



Short Code Enablement Workbook

This document was created to provide an overview of the information needed to complete the Campaign Application Form (CAF) for a new US Private Short Code to be used with Marketing Cloud's MobileConnect. Items in purple are required from the client and used for CAF submission.

Key Links and Resources

- [CTIA Short Code Monitoring Handbook](#)
- [Character Counter](#)

COMPANY INFORMATION		
<i>All US mobile carriers require the following company information for all new Campaign Submissions.</i>		
0.1	Company Name	
0.2	Parent Company	<i>(if applicable)</i>
0.3	Tax ID	
0.4	Company URL	
0.5	Company Mailing Address	
0.6	Client Point of Contact	
0.7	POC Email Address	
0.8	POC Phone Number	

1. CAMPAIGN DETAILS

1.1	Note	The 5- or 6-digit number provided by Salesforce after you submit your Reservation Form to request a short code number. If you selected a random code , this will be a random number. If you purchased a vanity code from your Salesforce Account Executive, the availability of your desired number will need to be confirmed.
	Short Code	
1.2	Note	This is a dropdown option and includes a variety of options for SMS and/or MMS, different opt-in methods, and different transaction styles. <i>Example: Standard Rate SMS (Keyword Opt-In, One Time Transaction)</i>
	Campaign Type	
1.3	Note	This number can be found in the URL while logged into your Marketing Cloud org. <i>Example: S12</i>
	Stack Number	
1.4	Note	It is important to include whether you plan to send only SMS or include MMS as well. This will determine how your MobileConnect is provisioned. If you submit for SMS and decide later you'd like to send an MMS, you'll need to resubmit. <i>Example: SMS, MMS, or SMS/MMS</i>
	Campaign Message Type	
1.5	Note	A migration is when you carry your existing short code number to your MobileConnect. If you are using another messaging platform but a new short code, it is not a migration.
	Migration / Transfer Details	<i>(if applicable)</i>
1.6	Note	The Campaign Name / Sponsor should include the brand name and description of the program type. <i>Example: MarDreamin' Promo Alerts, MedCenter Appt Reminders, NEWS10 Weather Alerts</i>

	Campaign Name / Sponsor	
1.7	Note	Share a short summary of the purpose and nature of the messages that will be sent from this campaign and include what type of program you are running. See 5.1 for more information on Service Type. The Campaign Overview and Campaign Description can be the same. <i>Examples: 'This code will be used to promote Sercante's annual marketing event, MarDreamin', to those who've opted in to receive communication.'</i> or <i>'News, updates, offers, and alerts from Sercante.'</i>
	Campaign Overview	
	Campaign Description	
1.8	Note	There will be a checkbox if this is intended to be Location Based Services (LBS). If so, you'll need to provide the LBS Aggregator.
	LBS	(if applicable)
1.9	Note	Most campaigns are considered 'Ongoing', but you will have to select that radio button. If there is an end date to your campaign, you'll need to include that date.
	End Date or Ongoing	(if applicable)
1.10	Note	Also known as Opt-In MO, this is the keyword that your customers will text to your short code in order to subscribe to your campaign. Choose one Opt-In Keyword. You also have the option to utilize a double opt-in process. <i>Example(s): MARDREAMIN, EVENTS, DRAGONS</i>
	Opt-In Keyword	
1.11	Note	Disclose how often you intend to send mobile messages to your subscribers as part of this campaign. <i>Example: 'Message frequency may vary' or '4x/month'</i>
	Freq. of Messages	
1.12	Note	The list of keywords below are the standard required keywords available to a subscriber to send to your short code to opt-out of all future messaging.

	Opt-Out Keywords	STOP, END, CANCEL, QUIT, UNSUBSCRIBE
1.13	Note	This is the standard keyword that subscribers will send to your short code in order to receive Customer Support information. Short code programs should promote customer care contact instructions at campaign opt-in and at least once per month.
	Help Keyword	HELP
1.14	Note	Include an email address subscribers may contact for support or with questions.
	Help Email	
1.15	Note	Include the toll-free phone number subscribers may contact for support or with questions. Note that Sprint requires a toll-free number for all programs.
	Help Toll-Free Number	
1.16	Note	Provide an example of a message that subscribers may receive during the campaign. This example should contain the 1.6 Campaign Name Sponsor, 1.11 Frequency of Messages, HELP and STOP information, and additional carrier cost disclosure. Keep your message to 160 character count maximum. <i>Example: Don't miss the \$200 savings on your workshop if you register now! (URL) Msg freq may vary. Reply HELP for help, Reply STOP to cancel.</i>
	Sample Alert	
1.17	Note	Mobile messaging/SMS must be addressed and included in your Terms & Conditions web page. The example link below does not constitute legal advice. Your updated Terms & Conditions must be live on your site prior to submission to the carriers. You may also submit the updated language via PDF for aggregator review with initial CAF submission. <i>Example: See Page 2 for best practices, Terms & Conditions template, and common errors.</i>
	Terms & Conditions URL	
1.18	Note	Update your existing Privacy Policy to include information collected for mobile messaging will not be shared.
	Privacy Policy URL	

CUSTOMER SUPPORT INFO / PRIMARY OPERATIONAL CONTACT

1.19	Note	Includes a toll-free number, web address, and/or e-mail address. Sprint requires a toll free number for all programs. Toll free numbers must be represented in 888-888-8888 format. This can match 1.14 and 1.15 above. T-Mobile requires a support URL for all programs. If a dedicated support web page does not exist, please use the 'Contact' page as the URL.
	Email Address	
	Toll Free Number	
	Website URL	

2. USER EXPERIENCE

2.1	Note	The Call-to-Action is self-populated in the CAF based on the information provided above, however, confirm it contains a description of how the user can opt in, how the CTA is delivered (web/in store signage/email/direct mail, etc.), HELP and STOP instructions, message frequency, and the URLs to both the Terms & Conditions and the Privacy Policy. <i>Example: Text DRAGONS to 12345 for your promo code. Msg freq may vary. Text HELP for help, STOP to cancel. T&C: URL, Privacy Policy: URL</i>
	CTA	
2.2	Note	The text that will be delivered to your subscribers mobile device in response to the 1.10 Opt-In Keyword, 1.13 Help Keyword, or 1.12 Stop Keyword. <i>Example Opt-In: Welcome to Sercante's events and all things MarDreamin'. Msg freq may vary. Msg and data rates may apply. Reply HELP for help, Reply STOP to cancel.</i> <i>Example Help: Sercante: For more info, call 888-888-8888 or visit http://sercante.com/sms. Msg freq may vary. Data rates may apply. Reply STOP to cancel.</i> <i>Example Stop: You have opted-out and will receive no further messages from Sercante for events. Reply HELP for more info, or call (800) 555-5555.</i>
	Opt-In MT	
	Help MT	
	Stop MT	

3. CARRIERS

3.1	Note	Tier 1, Tier 2, and Tier 3 carriers are listed individually and selectable by checkbox. You have the option to Select All for each tier. Important: SMS is available to send to all tiers, but MMS messages are limited to Tier 1 carriers only.
	Select Carriers	

AVERAGE US CARRIER REVIEW TIMELINES

The following estimates are the average time periods taken by the carrier(s) and may vary.

AT&T	4 - 6 weeks
Sprint / Boost / Virgin	4 - 6 weeks
T-Mobile / MetroPCS	8 - 10 weeks
Verizon	8 - 12 weeks
Tier 2 & Tier 3 Carriers	8 - 12 weeks

5. SERVICE TYPES

5.1	Note	Service Types are listed individually and selectable by checkbox. The options include Alerts, Coupons/Advertising, Sweepstakes or Contest, Information on Demand, In Venue, Print/Outdoor, MMS, Voting/Polling, and Location Based Services. Alerts provide urgent, relevant information to a mobile subscriber. Alerts campaigns can be utilized to provide customers with account notifications, event-specific communications, appointment reminders, shipping alerts, and many more. You must select MMS if your short code will be both SMS/MMS.
	Service Types	
5.2	Note	Content Ratings are listed individually and selectable by checkbox. The options include C7+, T13+, YA17+ and an open-text place to include Other.
	Content Ratings	
5.3	Note	Connectivity Preferences are listed individually and selectable by checkbox. The options are SMPP and HTTP.
	Connectivity Preference	

6. LEGAL CONCERNS

6.1	Note	Legal Concerns are listed individually and selectable by checkbox. The options are FTEU, Location Based Services, Lottery or Gambling, Sweepstakes or Contest, M18+, N/A, and an open-text place to include Other.
	Legal Concerns	

7. UPLOAD DOCUMENTS

7.1	Note	If you have documentation to provide to support your Campaign Application, it will be submitted here. PDFs should be submitted on company letterhead. If you have short code migration documents, you would add those here as well.
	Upload Documents	<input type="checkbox"/> Terms & Conditions <input type="checkbox"/> Privacy Policy <input type="checkbox"/> Call-to-action mockup (web/in store signage/email/direct mail, etc.)