



Follow steps to start CRM:

Below is the exact information to use for the A2P campaign verification: copy & paste make sure to replace/add your name

Step 1- Go to settings, phone numbers, trust center, A2P Registration, Start registering now:

- Yes in the U.S.
- Fidelity Insurance Direct LLC
- Phone # - YOUR CELL
- Yes Tax ID: 93-4312270
- Website - <https://www.verifiedproducerfidelityelevated.com>

Go to settings, phone numbers, trust center, campaigns, create campaign, Standard Low Volume Mixed Messaging Use Case | Page 1

#####

Use Case Description

Please explain in detail

This campaign sends appointment information - confirmation & reminder messages to customers once they have booked an appointment with Fidelity Insurance Direct on the website and opted-in to receive promotional and notification SMS from Fidelity Insurance Direct.

Sample Message #1

Must include lead name, **your name**, business name & opt-out language

Hi John! This is Stephen from Fidelity Insurance Direct. Our appointment for July 20 11:00 AM is confirmed. Please reach out to +1(321) 376-4198 in case you need to reschedule. Reply STOP to unsubscribe.

Sample Message #2

Must include lead name, your name, business name & opt-out language

Hello, this is Stephen from Fidelity Insurance Direct. We are confirming your appointment tomorrow at 9 am. Reply STOP to unsubscribe.

Check both boxes at bottom for embedded links and messages including phone numbers

User Consent | Page 2

#####

How do lead/contacts consent to receive messages?



End users opt-in by visiting - <https://verifiedproducerfidelityelevated.com/contact> and filling in their details. Users check a box to receive notifications & promotional messages from us to provide their consent. Additionally end users can also text START to +1(321) 376-4198. You can find our terms and conditions at this link <https://verifiedproducerfidelityelevated.com/privacy-terms-opt-out>

Opt-in Keywords

“START, SUBSCRIBE”

Opt-in Message

You have successfully opted-in to receive notification and promotional SMS from Fidelity Insurance Direct. Please reply STOP if you need to Opt-out in the future.

Step 2 - PURCHASE NUMBER to text from (wait for A2P approval OR buy toll free)

Phone System [Manage Numbers](#) Usage Summary Regulatory Bundle/Address Trust Center **New** Advanced Settings

You are now A2P 10DLC compliant.

Manage Numbers 1 Phone Number [+ Add Number](#)

Manage your Phone Numbers and their configuration here

[Phone Numbers](#) [Number Pools](#) [Verified Caller IDs](#)

Numbers	Friendly Name	Forwarding Number	Call Timeout
+1 321-850-2680 Default Number	Local	(321) 850-2680	+1 407-797-0414

Page 1 of 1 [Previous](#) [1](#) [Next](#)

After completing step 1 up above, it may take a while you wait for your A2P verification to be approved for your local number (can take days and sometimes weeks).

In the meantime you can begin by using a Toll Free number for temporary use. (optional)

Below is the exact information to use for the Toll Free number verification.



Use Case Description

This number will be used to send appointment information - confirmation & reminder messages to our customers once they have booked an appointment with us on our website and opted-in to receive promotional and notification SMS from us.

Message Content

Hi John! This is Stephen from Fidelity Insurance Direct LLC. Our appointment for July 20 11:00 AM is confirmed. Please reach out to +1(321) 376-4198 in case you need to reschedule. Reply STOP to unsubscribe.

Hello, this is Stephen from Fidelity Insurance Direct LLC. I am following up with you about our meeting yesterday, would you have time to discuss this today.

Reply STOP to cancel

Opt-In Workflow Image URLs

storage.googleapis.com/msgsndr/3HIKR3IA9TQA5IFScWI9/media/65caaa46fdc006d582543614.png