

SMS Text Message Opt-In Consent Form

Tradesman Systems - For contractor / trades business use

Have the customer complete and sign this form before you send SMS from Tradesman (or any business line). Keep the signed copy with your records. You may also enter the consent in Tradesman under Customers -> SMS opt-in.

Business information

Business name

Business phone

Business address (optional)

Customer information

Customer full name

Mobile phone number

Email (optional)

Consent disclosure (read to customer or provide a copy)

"By submitting a service request or contacting Your Business, you agree to receive SMS messages related to your inquiry, scheduling, estimates, job updates, and customer support from Your Business. Message frequency varies. Message and data rates may apply. Reply STOP to opt out. Reply HELP for help."

☐ I agree to receive text messages as described above. I understand message frequency varies, message and data rates may apply, and I can reply STOP to opt out or HELP for help.

Consent to receive SMS messages is not required as a condition of purchasing goods or services.

Customer signature

Date (customer)

Business record (optional)

Recorded by (staff name)

Date (recorded)

Consent method (e.g. in person, phone)

Retention: Store this signed form (or equivalent proof) where you keep customer files. Tradesman Systems facilitates one-to-one messaging; your business is responsible for consent and opt-outs. This template is not legal advice.