Texting new customers your contact card

After a new customer's first text or call, HQ texts them your contact card once, so your number is saved under your name on their phone.

Steps

1. Open Configure, then This company.
2. Tick or untick Text new customers your contact card, and press Save. It is on unless you turn it off.

Good to know

The card goes once to each phone number, after the customer says yes to texts: by text, on a call, in your website chat, or when the office takes a job by phone.

It holds your company's name, your HQ number and your website. Never your address.

It follows the same rules as every other text: quiet hours, STOP, and the carriers' approval. Until the carriers approve your texting, no card goes.