

Texting for Agents

Where to text from, what happens automatically, and the one rule that catches people out.

What this guide covers

You text customers from inside EnrollHere, in the places you already work. Messages send from an agency line, not your personal phone, and the system handles opt-outs for you.

TOPIC	SHORT ANSWER	GO TO
Where to text	Conversations, the lead SMS tab, or the call panel. One thread.	Section 1
What gets sent	An agency line sends it. An opt-out line may be added for you.	Section 2
Customer replies	STOP, START, and HELP are handled automatically.	Section 3
Opt-out rules	STOP stops texts, not calls. Do Not Call stops both.	Section 4
Blocked sends	Work the checklist before escalating.	Section 5
Missing threads	Visibility is set per line by your admin.	Section 6

FIRST DISTINCTION

Opting out of texts is not opting out of calls. Voice, texting, and email are tracked separately. Section 4 covers it.

1. Where texting lives

Three places, one conversation. A thread you start during a call is the same thread you open later from the sidebar, so you never hunt for what was already said.

WHERE	WHEN TO USE IT
Conversations, in the sidebar	Your inbox view, where your agency has it enabled. Work through replies, pick up threads, and see what is waiting.
SMS tab on a lead	You are already on a lead and want their message history in context with their calls and notes.
Lead panel during a call	Mid-call, when you need to send something while still on the phone: a confirmation, an address, a link.

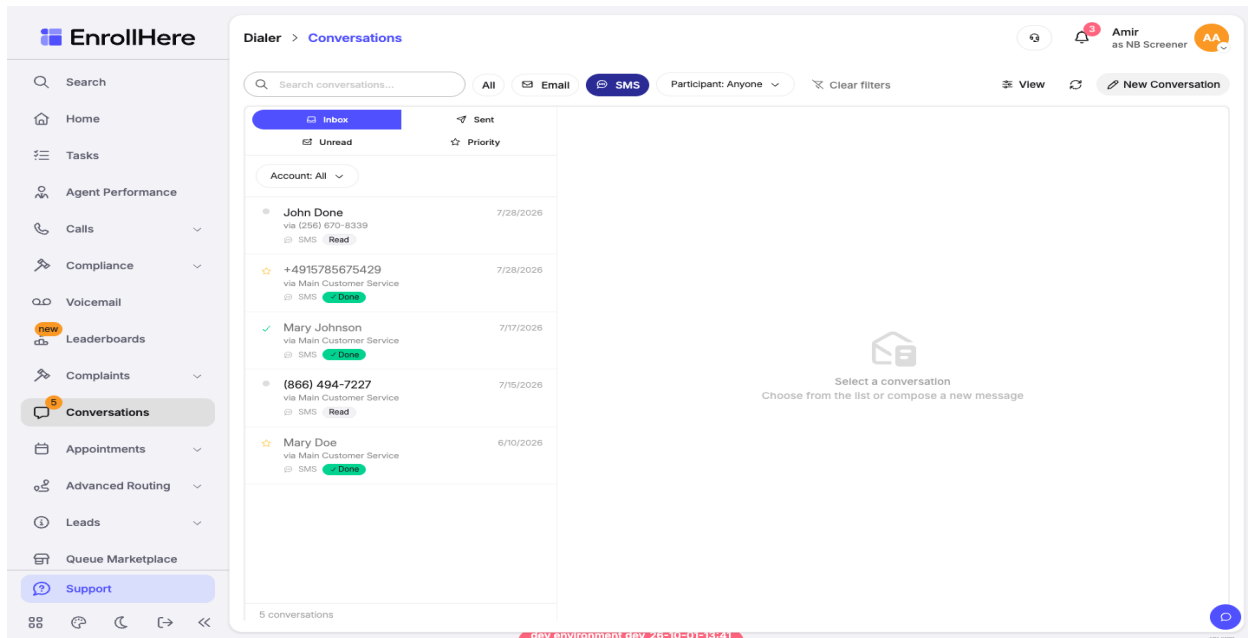


Figure 1. Conversations is the inbox view. Every thread here is the same thread the lead and call panels show.

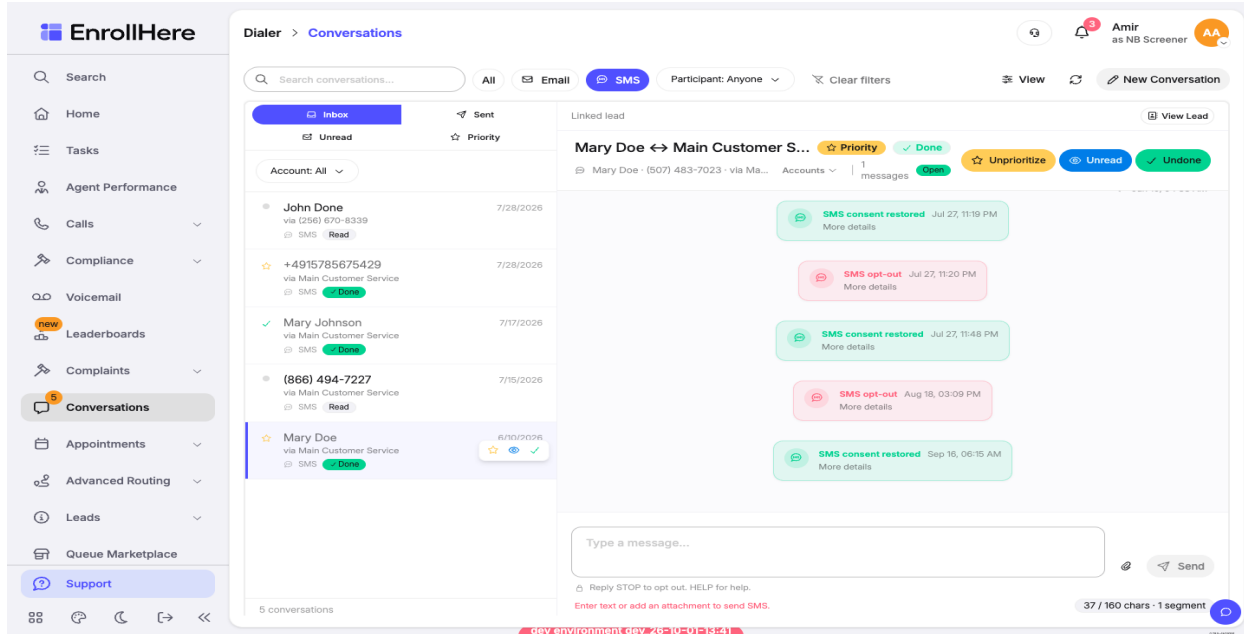


Figure 2. The SMS tab keeps a lead's texts in context with the rest of the record.

From inside a conversation, **View Lead** opens the lead in a panel beside the thread instead of navigating away. That panel has an action to open the full lead page.

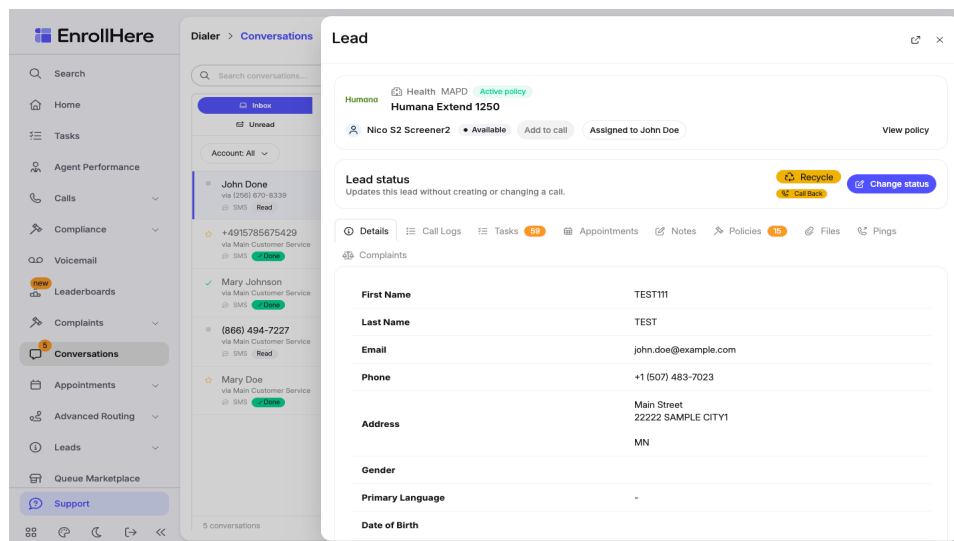


Figure 4. View Lead keeps the conversation open while you check the record.

2. Sending a text

The number you send from

You do not choose a number the way you pick a caller ID for dialing. Texting sends from a line your agency registered with the carriers, and your admin decides which line a conversation belongs to. If you think you are texting from the wrong line, ask your admin. Do not work around it.

NOT YOUR DIRECT NUMBER

You will not text from your own direct number. That is deliberate. Every texting number has to be individually registered and maintained, so agencies keep that to a small set of lines.

What gets added to your message

Depending on how your admin set up the line, an opt-out line may be appended to your message automatically: on the first message in a conversation, on every message, or periodically.

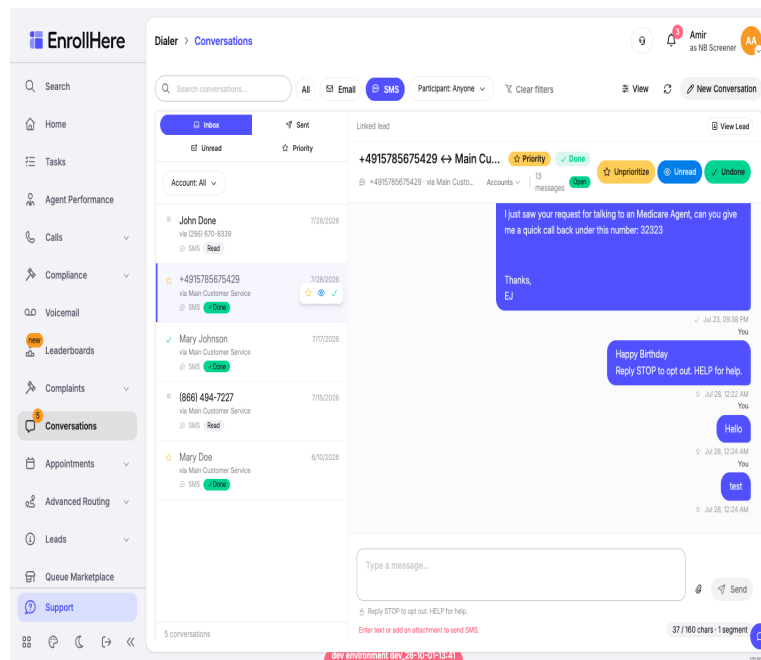


Figure 5. The opt-out line is added for you when the line is set to append it.

DO NOT TYPE THE OPT-OUT LINE

You do not need to type it yourself, and you should not. If the line appends it, typing it as well sends it twice.

Attachments

You can attach an image or a PDF. Files must be under **1 MB** and in a supported format: **JPG, PNG, WebP, HEIC, or PDF**. Anything larger or in another format is rejected.

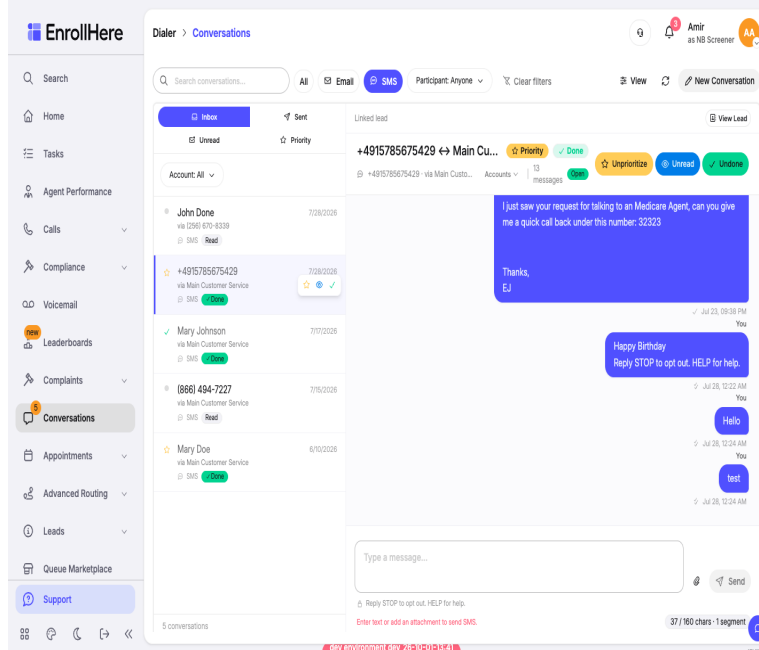


Figure 6. Attach an image or PDF under 1 MB.

3. What customers can reply

Some replies are handled before you see them. These are carrier requirements. They run automatically, and you cannot turn them off for an individual customer.

THEY SEND	WHAT HAPPENS
STOP, or a variant	They are opted out of texts immediately and get a confirmation. You cannot text them anymore. Not reversible from your side.
START or UNSTOP	They are opted back in and get a confirmation. Texting works again.
HELP or INFO	They get your agency's help message. Consent does not change, and they get it even if already opted out.

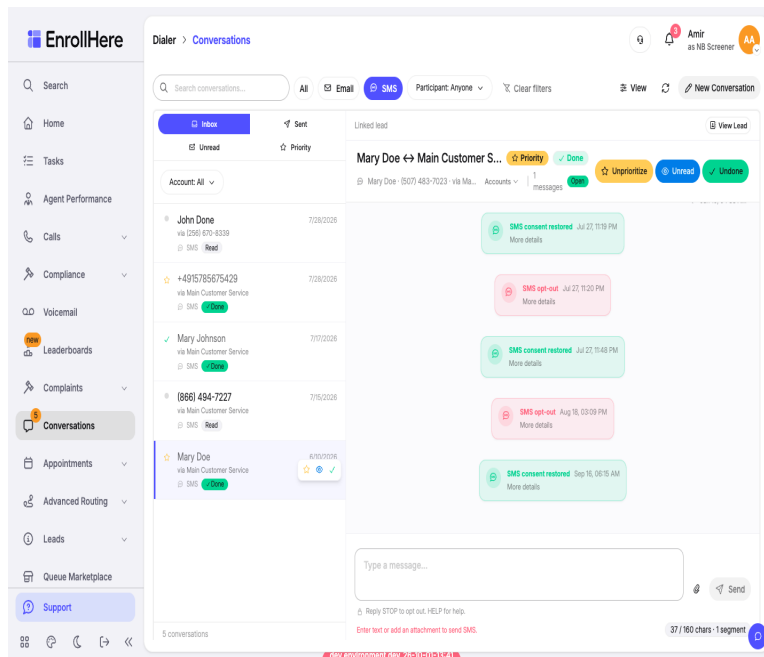


Figure 7. STOP is handled automatically. The confirmation is a system message.

DO NOT TRY TO TALK SOMEBODY OUT OF A STOP

Once it lands, the system enforces the block. Asking a colleague to text them from another line is a compliance problem, not a workaround.

4. The rule that catches people out

STOP IS NOT DO NOT CALL

Opting out of texts is not the same as opting out of calls. Voice, texting, and email are tracked separately.

WHAT HAPPENED	STOPS TEXTS	STOPS CALLS
Customer replied STOP	Yes	No. They are still dialable and still come up in campaigns.
Call dispositioned Do Not Call	Yes. They get a notice and can reply START .	Yes

If the customer clearly wants to be left alone entirely, do not assume the **STOP** handled it. Disposition the call **Do Not Call** so the voice side is covered too.

You cannot override any of this yourself. If a customer tells you on a call they want texts turned back on, have them reply **START**. Employees with lead access can override a block where there is a legitimate reason, and the system makes them record it.

5. When a message will not send

Work down this list before escalating. Most blocked sends are the first two.

WHAT YOU SEE	USUAL CAUSE
Send rejected as opted out	The contact replied STOP, or was dispositioned Do Not Call. Only a START from the customer, or a documented override by an employee with lead access, clears it.
Texting unavailable across the board	Your agency's carrier registration is not finished. Nothing on your side changes this. It is on your admin.
Thread will not open or is missing	You may not have visibility on that line. See Section 6.
Sent, no reply, no error	Sent is not delivered. Carriers filter mobile traffic aggressively, and shortened links are a known trigger. Use full links.

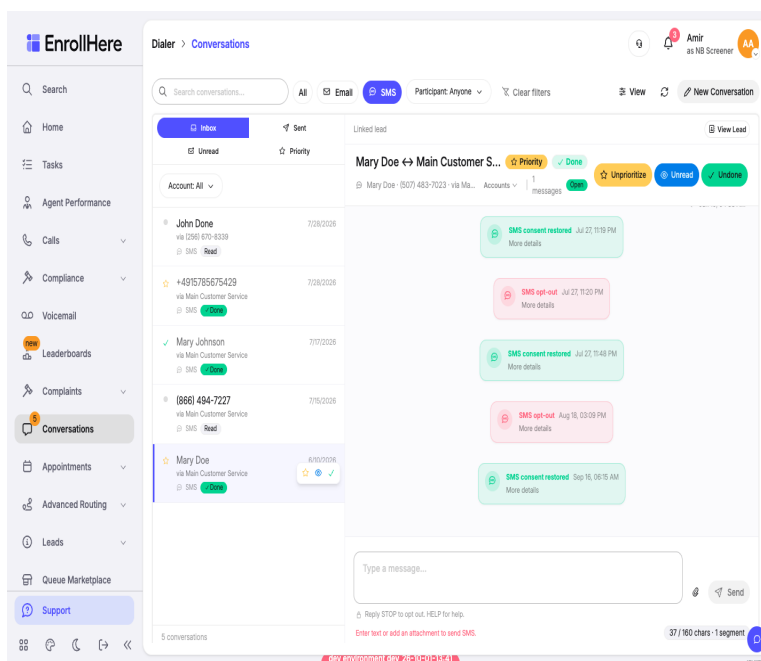


Figure 9. An opted-out contact cannot be texted until they reply START.

USE FULL LINKS

Link shorteners are a well-known carrier filtering trigger. A message can show as sent and never reach the phone.

6. What you can see

Which threads you can read is set per line by your admin. There are two models, and your agency can run both on different lines.

LINE MODEL	WHAT YOU SEE	TYPICAL USE
Shared line	Every thread on the line.	Support desk
Lead-owned line	Only threads for leads that are yours.	Sales floor

- **Unowned leads.** On a lead-owned line you do not see threads for leads nobody owns, so an inbound text from an unrecognized number may not reach you.
- **Lead history.** You can still read a lead's message history from their lead page or the call panel on a lead-owned line. That history belongs to the lead, not the inbox.

7. Quick answers

QUESTION	ANSWER
Can I text from my own cell?	Not through EnrollHere, and not outside it either. Anything sent outside the platform is invisible to the record and unprotected on compliance.
A customer replied STOP by mistake. Can I undo it?	Not from your side. Ask them to reply START.
Do I need to type the opt-out wording?	No. If your line appends it, it is added for you. Typing it sends it twice.
Can I send a picture?	Yes. An image or PDF under 1 MB in JPG, PNG, WebP, HEIC, or PDF.
Does texting STOP stop them being dialed?	No. Those are separate. See Section 4.
Why did it take so long before we could text at all?	Carrier registration, not EnrollHere. Campaign approval typically runs a couple of business days once submitted.

8. Related guides

- **EnrollHere Texting Agency Setup Guide.** Brand and campaign registration, numbers, consent settings, and line visibility. For admins.

If a send is blocked: check opt-out status → check registration with your admin → check line visibility.