



Branded Calling ID – Enterprise User Guide

This guide walks **Enterprise** users through the process of **logging in, completing a 7-step BCID application, and tracking its status** within the Branded Calling platform.

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1 Logging In

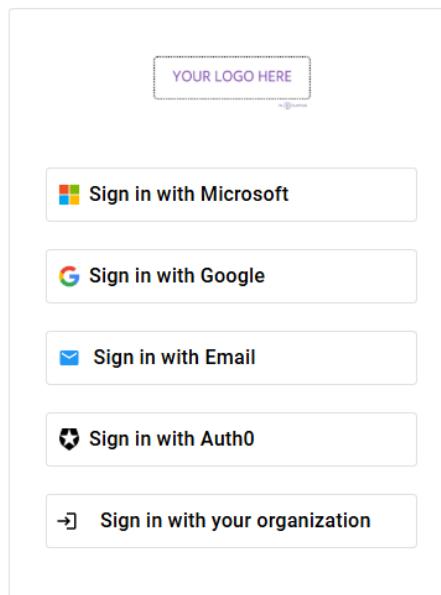
1. Invitation Link

- a. Infobip will email you a unique portal link.
- b. If you don't have this link or need it re-sent, **contact Infobip** directly.

2. Sign In with Microsoft, Google or Email/Password

- a. Click the invitation link in the onboarding email you have received. You will be directed to the login page, where multiple sign-in options are available.
- b. If you received the invitation using:
 - i. **A Microsoft email address**, select **Sign in with Microsoft**.
 - ii. **A Google (Gmail) email address**, select **Sign in with Google**.
 - iii. If you **do not use Microsoft or Google**, the onboarding email includes a temporary password. Select the **Sign in with Email** option.

Note that the options “sign in With Auth0” and “Sign in with your organization” are not applicable and will be removed at some point in time from this login screen.



3. Dashboard Arrival

After successful authentication, you'll land on the **Dashboard**, which serves as your home page. Refrain from starting your onboarding until you reach the section "Submit Your Branded Calling (BCID) Application" on page 12.

2 Portal Overview

2.1 Left-Hand Menu

As an **Enterprise user**, the left-hand menu provides access to the following sections:

2.1.1 Branded Calling

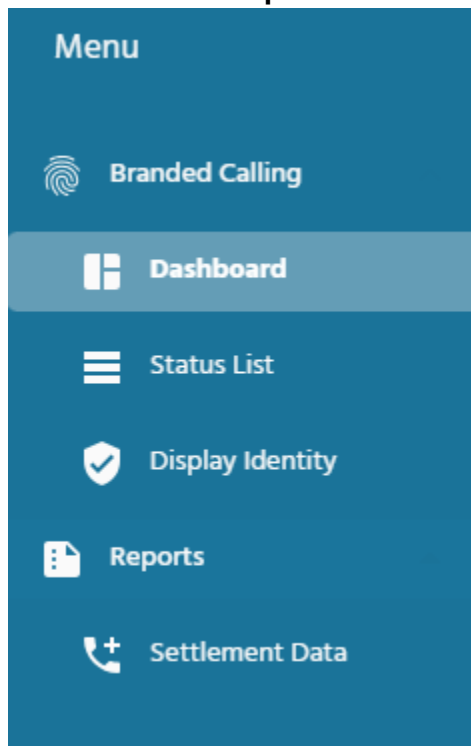
This is the primary section for managing your Branded Calling applications and display identities. It includes the following sub-menus:

- Dashboard
- Status List
- Display Identity

2.1.2 Reports

This section provides access to call performance and settlement data.

- **Settlement Report**



2.2 Dashboard Overview

The **Dashboard** is the default home page and provides a high-level view of your Branded Calling activity.

2.2.1 Enterprise Onboarding & Vetting Status

This widget displays a pie chart summarizing the current status of your Branded Calling (BCAD) application, allowing you to quickly understand where it stands.

Application statuses include:

- **Pending Review** – The application was submitted and received, but vetting has not started yet.
- **In Progress** – The vetting process is actively underway.
- **Complete** – The application is fully approved, and the display identity is active.
- **Saved** – The application was started but not yet submitted.
- **Rejected** – The application was reviewed and rejected; flagged steps must be corrected.
- **Resubmitted** – The application was resubmitted after corrections and is awaiting review.

2.2.2 Branded Calling Applications Widget

This widget provides a preview list of your submitted application, including key details such as:

- Submission date
- Applicant
- Application status
- Available actions (three-dot menu)

A **New Application** button is available in the top-right corner of this widget, allowing you to start a new Branded Calling application at any time.

Please note that **only one application** should be submitted at any time. If additional Display Identifies can be added once the initial 7 step onboarding has been submitted and approved, we do not support registering multiple applications for the same customer account.

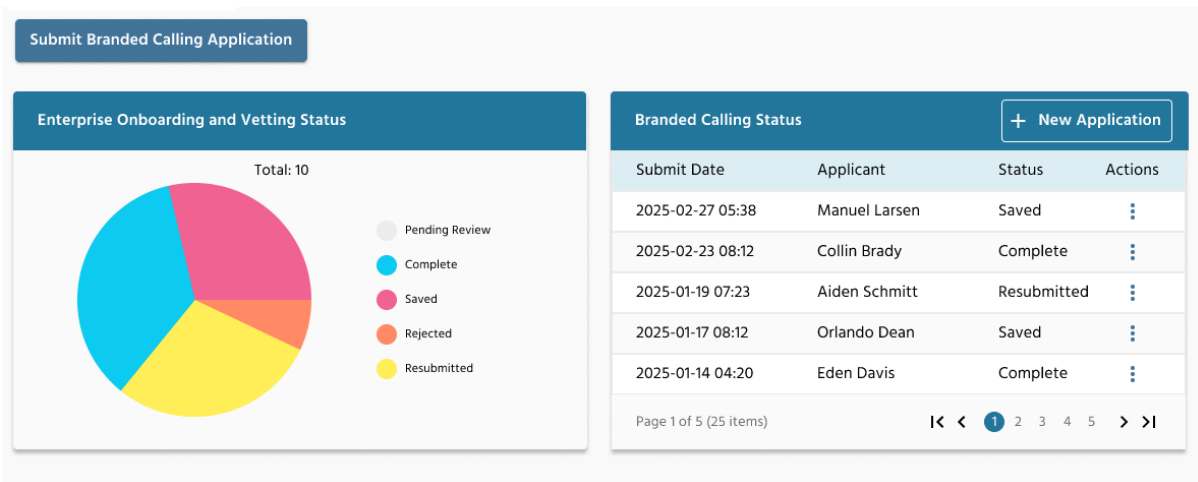
2.2.3 Alerts

The Alerts widget notifies you of important actions or updates, such as:

- 180-day attestations
- Annual re-verification reminders
- Requests for additional information during vetting (Flagged Steps)

2.2.4 Submit Branded Calling Application

A primary action button is available on the Dashboard to begin the **7-step Branded Calling application process**.



2.3 Status List

The **Status List** provides a detailed view of the Branded Calling application you have created.

2.3.1 Application Table

The table includes the following information:

- Submission date
- Applicant
- Company name
- Application status
- EID (Enterprise Identifier)
- Logo preview
- Telephone number count
- **Comments**
- **Actions** (three-dot menu)

2.3.2 Comments Column

The Comments column displays messages related to your application.

- A message icon with a **red indicator** means action or clarification is required.
- Selecting the icon opens a pop-up showing all comments and requests.

2.3.3 Actions Menu

Available actions include:

- **Edit** – Continue or update an application that is not yet complete.
- **View** – View a read-only version of the full 7-step application.
- **Download** – Download a PDF copy of the application.

A **New Application** button is also available to start a new submission. Please note that **only one application** should be submitted at any time. If additional Display Identifies can be added once the initial 7 step onboarding has been submitted and approved, we do not support registering multiple applications for the same customer account.

2.4 Display Identity

Note: If you do not see the Display Identity option, please contact Infobip to request access.

The **Display Identity** section allows you to manage active display identities associated with your enterprise.

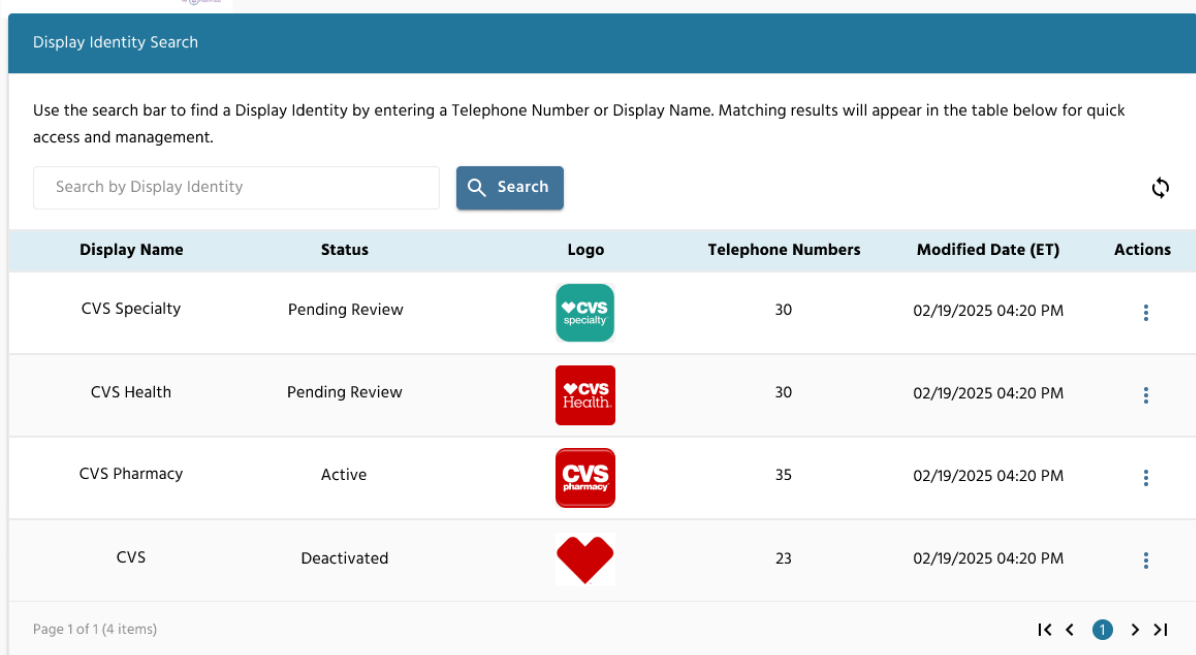
2.4.1 Display Identity Table

The table includes:

- Display Name
- Company Name
- Status (Active, Pending Review, Deactivated)
- Last Modified Date
- Actions (three-dot menu)

Status meanings:





- **Active** – Display identity is live and branding is being displayed on calls.
- **Pending Review** – A change request is under review; the existing identity remains active.
- **Deactivated** – The display identity is no longer active.



Display Identity Search

Use the search bar to find a Display Identity by entering a Telephone Number or Display Name. Matching results will appear in the table below for quick access and management.

Search by Display Identity

Display Name	Status	Logo	Telephone Numbers	Modified Date (ET)	Actions
CVS Specialty	Pending Review		30	02/19/2025 04:20 PM	⋮
CVS Health	Pending Review		30	02/19/2025 04:20 PM	⋮
CVS Pharmacy	Active		35	02/19/2025 04:20 PM	⋮
CVS	Deactivated		23	02/19/2025 04:20 PM	⋮

Page 1 of 1 (4 items)

2.4.2 Viewing a Display Identity

Selecting **View** displays the following read-only fields:

- Display Name
- Call Reason
- Logo
- Call From Numbers

- Activated Date
- Last Modified Date
- Deactivated Date (if applicable)

2.4.3 Change Requests

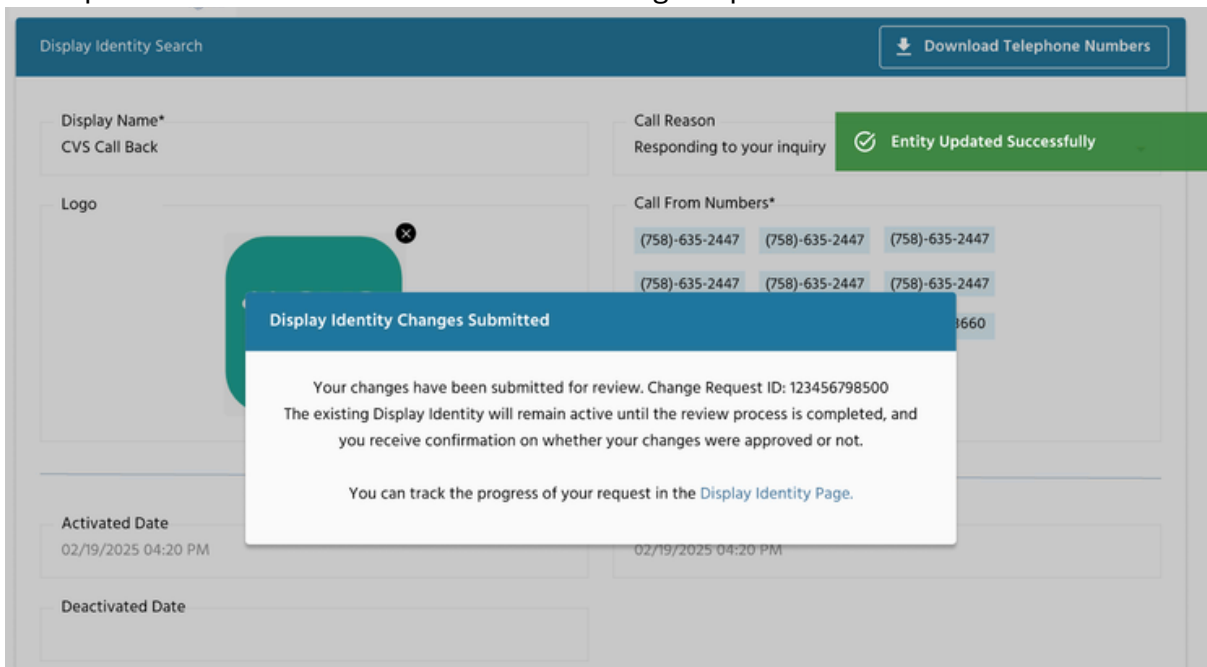
To request changes (e.g., update logo, display name, call reason, or phone numbers):

1. Select **Edit**.
2. Update the editable fields:
 - a. Display Name
 - b. Call Reason
 - c. Logo
 - d. Call From Numbers
3. Acknowledge that a **Change Request fee may apply**.
4. Select **Save**.

A confirmation message will appear with a **Change Request ID**, stating that:

- The existing Display Identity remains active during review.
- Approval or next steps will be communicated.
- Progress can be tracked in the Display Identity table.

Infobip will also receive notification of the change request.



2.5 Reports – Settlement Report

The **Settlement Report** allows you to track confirmed branded call activity.

The screenshot shows a 'Reports' dashboard with the following elements:

- Filters:** 'Your Company' dropdown, two date range selectors (1/14/2025 2:33:38 PM and 2/13/2025 2:33:38 PM), a 'Search' button, and an 'Export' button.
- Summary Panels:**
 - Confirmed Branded Calls:** 12,500 (Successful Branded Delivery)
 - Total Calls:** 15,425 (Total Number of Calls Signed)
 - Participating Enterprises:** 1 (Total Participating Enterprises)
- Table:** A table with columns: Call Date & Time, Internal ID, EID, DIR ID, Outbound TN, and Requeste. It contains 4 rows of call records.
- Page Info:** Page 1 of 1 (4 items) and navigation arrows.

Call Date & Time	Internal ID	EID	DIR ID	Outbound TN	Requeste
02/19/2025 04:20 PM	ASIDOYHOS0001	1ef5fd89f28d6d53a3ef61e2987db3a5	1ef5fd607f2963d3810325b72e164fa0	12033768714	N
02/19/2025 04:20 PM	ASIDOYHOS0001	1ef5fd89f28d6d53a3ef61e2987db3a5	1ef5fd607f2963d3810325b72e164fa0	12033768714	N
02/19/2025 04:20 PM	ASIDOYHOS0001	1ef5fd89f28d6d53a3ef61e2987db3a5	1ef5fd607f2963d3810325b72e164fa0	12033768714	N
02/19/2025 04:20 PM	ASIDOYHOS0001	1ef5fd89f28d6d53a3ef61e2987db3a5	1ef5fd607f2963d3810325b72e164fa0	12033768714	N

2.5.1 Filters & Controls

You can:

- Select your enterprise
- Choose a date range or timeframe
- Select **Search** to load results
- Select **Export** to download data

2.5.2 Summary Panels

The report displays three summary panels:

- **Confirmed Branded Calls** – Calls where branding was successfully displayed
- **Total Calls** – All calls, regardless of branding outcome
- **Participating Enterprises** – Enterprises with records in the selected timeframe

2.5.3 Settlement Table Columns

The table includes:

- **Call Date & Time** (UTC)
- **Internal ID** – Identifier assigned by Infobip
- **EID** – Your BCID enterprise identifier
- **DIR ID** – Display Identity used for the call (clickable to view details)
- **Outbound TN** – Phone number used to place the call
- **Requested Claims** – Branding requested (N = Name, L = Logo, C = Call Reason)
- **Confirmed Claims** – Branding successfully displayed
- **Carrier** – Network used (e.g., T-Mobile, Verizon)

Tooltip icons explain Requested and Confirmed Claims.

2.5.4 Exporting Data

The **Export** option downloads a spreadsheet containing all confirmed call records for analysis or internal tracking.

3 Submit Your Branded Calling (BCID) Application

To begin placing branded calls, your organization must submit a **Branded Calling (BCID) application** for vetting and approval. This is a **7-step process** designed to be easy to follow, with instructions provided throughout each step.

Our goal is to get your application vetted **as quickly and efficiently as possible**—please follow each step carefully to avoid delays.

3.1 Where to Start

You can start a new Branded Calling application from multiple places in the portal:

- **Dashboard (Main Button):** Select **Submit a Branded Calling Application**.
- **Dashboard Widget:** In the **Branded Calling Status** widget, select **New Application**.
- **Status List:** Go to **Branded Calling > Status List**, then select **New Application** (if visible).

Please note that only one application should be submitted at any time. If additional Display Identifies can be added once the initial 7 step onboarding has been submitted and approved, **we do not support registering multiple applications** for the same customer account.

3.2 The 7-Step Application

Each step includes specific instructions on what information is needed. The **Save & Next** button is used to move forward through each step.

Important: Each time you select **Save & Next**, the platform automatically saves your progress. If you need to stop at any time, you can return later by going to **Status List**, selecting your application, and choosing **Edit** to continue.

3.2.1 Step 1: Applicant Information

This step collects information about the person completing the application:

- **Who:** The individual completing this form.
- **Fields (required):** First Name, Last Name, Email, Phone Number.
- Select **Save & Next** to continue.

Branded Calling Onboarding

Please submit your Brand Identity information using this form to help us protect and strengthen your brand. Our goal is to get your application vetted as quickly and efficiently as possible.

1 Applicant Information — 2 Business Details — 3 Business Identity — 4 Customer Contacts — 5 Agent Of Record — 6 References — 7 Display Identity

Application Information

This is the contact information for the person responsible for the submission and will be used during the verification process and for any future interactions or reviews. This person is accountable for the information entered in the following steps and will be verified by email. Please use a company email address and a direct mobile number that they can be reached at. The main point of contact can be modified after the application is submitted if necessary.

First Name * Emily	Last Name * Carter
Email Address * ecarter@vitacaresolutions.com	Phone Number * 965-852-9741

Save & Next

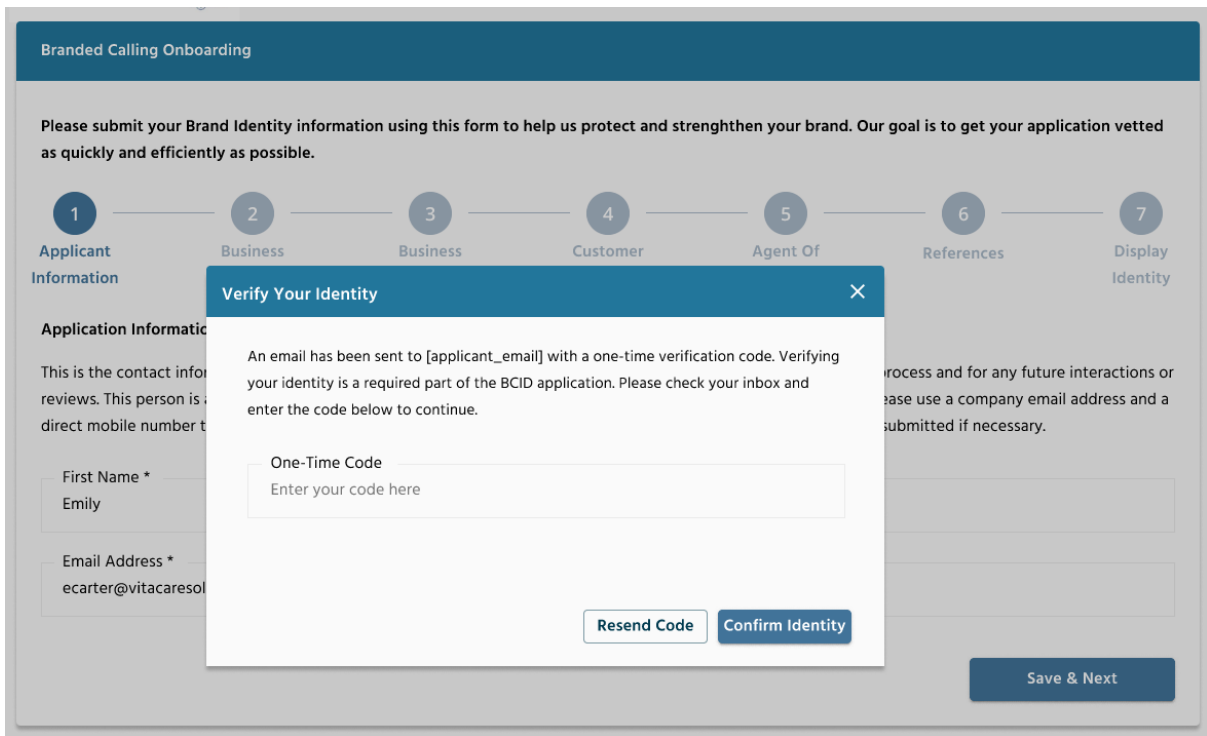
Applicant Email Verification

After selecting **Save & Next**, you will see a pop-up: **Verify Your Identity**.

- A one-time verification code will be sent to the **email address entered in Step 1**.
- Check your inbox and enter the code into the pop-up.
- If you do not receive an email, select **Resend Code**.
- Select **Confirm Identity** to proceed.
- If the code is incorrect or expired, request a new code and try again.
 - Codes expire after **24 hours**.

Once successful, you will see a confirmation message:

“Identity verified successfully. You may now continue your application.”



3.2.2 Step 2: Business Entity Details

This step collects the basic business information used to identify your company.

- **Purpose:** Identify your organization and validate legal business information.
- **Fields (required):**
 - Legal Business Name (*must match your state registration*)
 - Business Website
 - Headquarters or Primary Business Address: Address Line 1, City, State, ZIP Code.
- Select **Save & Next** to continue.

Important: Use your **legal business name** (do not enter DBA names unless your legal registration reflects it).

Branded Calling Onboarding

1 Applicant Information — 2 Business Details — 3 Business Identity — 4 Customer Contacts — 5 Agent Of Record — 6 References — 7 Display Identity

Business Entity Details

We collect basic business information to identify your company and ensure compliance with legal standards. Please enter the official Legal Business Name, headquarters address, and a valid company website. These details must be accurate and consistent, as they will be cross-checked during verification. For businesses with multiple locations, use the main location or headquarters. State-level business records will be confirmed based on the state of the primary business address.

Legal Business Name *
VitaCare Solutions, Inc.

Business Website *
www.vitacaresolutions.com

Address Line 1 *
1234 Wellness Blvd, Suite 500

City *
Orlando

State *
FL

Zip Code *
32801

Previous Save & Next

3.2.3 Step 3: Business Identity Details

This step collects unique identifiers to help confirm your organization.

- **Purpose:** Support business identity verification.
- **Required Field:**
 - **FEIN (Federal Employer Identification Number)** (*required*)
 - Tip: Your FEIN can typically be found on your organization's **W-9 form**.
- **Optional but strongly recommended fields (to reduce delays):**
 - Dun & Bradstreet Number (DBN)
 - State Corporation Registration Number
 - State Professional License Number
 - Primary Business Domain (SIC Code)

Important: This is one of the most common areas where applications are delayed—please ensure your **FEIN is entered correctly** and matches your official records.

Branded Calling Onboarding

1 Applicant Information 2 Business Details 3 Business Identity 4 Customer Contacts 5 Agent Of Record 6 References 7 Display Identity

Business Identity Details

The primary business ID will be a Federal Employer ID Number (FEIN) or Dun & Bradstreet Number (DBN). Please provide both if available. Your employer's W-9 form should hold the FEIN. Supporting elements are usually found on the Secretary of State website for your state. Standard Industrial Classification (SIC) codes are self-assigned and can be found on the SEC SIC code list.

To help us verify your business identity more efficiently, please ensure all details match your official records. Including supporting ID elements is highly recommended to avoid delays during the verification process.

Primary Federal ID

Federal Employee ID Number: 92-4567890 Dun & Bradstreet Number: 10-234-5678

Supporting ID Elements

State Corporate Registration Number: FL2025-987654 State Professional License Number: HLT-456321

Primary Business Domain (SIC Code): 8011

Previous Save & Next

3.2.4 Step 4: Consumer Protection Contacts (Optional)

This step allows you to add contact details consumers can use for inquiries or complaints.

- **Fields (optional):**
 - Consumer Complaint Email (*recommended: Customer Support / Compliance-managed email*)
 - Consumer Complaint Phone Number
 - Data Privacy Website URL (if applicable)
- **Note:** If provided, ensure this information is accurate and actively monitored.

Branded Calling Onboarding

1 Applicant Information — 2 Business Details — 3 Business Identity — 4 Customer Contacts — 5 Agent Of Record — 6 References — 7 Display Identity

Customer Protection Contacts

This information helps us ensure that consumers have a clear and accessible path to address any concerns. In most organizations, consumer complaint information is documented and managed by teams such as Customer Support, Quality Assurance, or Compliance. Please ensure the contact details are accurate and active, as they may be referenced during compliance checks or follow-ups.

Consumer Complaint Email
Enter your Consumer Complaint Email

Consumer Complaint Phone Number
Enter your Consumer Complaint Phone Number

Data Privacy Website URL
Enter your Data Privacy Website URL

Previous Save & Next

3.2.5 Step 5: Business Agent of Record

This step collects the registered agent information listed in your state business registration.

- **Who:** The individual or entity listed as the **Registered Agent** on your state registration.
- **Important Notes:**
 - The agent's name and address must **match your state records**.
 - Do not list your CEO/owner/legal counsel unless they are officially listed as the Registered Agent.
- **Fields (required):**
 - Institution Name
 - Street Address, City, State, ZIP Code
 - Contact Name
 - Phone Number
 - Email Address

Branded Calling Onboarding

1 Applicant Information — 2 Business Details — 3 Business Identity — 4 Customer Contacts — 5 Agent Of Record — 6 References — 7 Display Identity

Business Agent Of Record

The Business Agent of Record is the individual or entity listed as the registered agent in your company's official state business registration records. This person or entity is responsible for receiving legal documents and government notices. The name and address provided here must exactly match what's listed in your Secretary of State registration. Any discrepancies may delay processing or trigger additional verification steps.
Important: Do not list your CEO, owner, or legal counsel unless they are specifically named as the registered agent in the state records.

Institution Name * VitaCare Solutions, LLC	Street Address * 1234 Wellness Blvd, Suite 500
City * Orlando	State * FL
Zip Code * 32801	Contact Name * Emily Carter
Phone Number * 407-555-7890	Email Address * ecarter@vitacaresolutions.com

Previous Save & Next

3.2.6 Step 6: References

References are required to confirm your organization's identity.

Internal Business References (Required):

- You must provide **two internal business references**.
 - These should be employees such as executives, senior managers, or leadership team members.
 - You **cannot list yourself** as a reference (the applicant and references must be different people).
- **Fields (required for each internal reference):**
 - Name
 - Title
 - Phone
 - Email

Important: Each internal reference will receive an email with a verification link.

- Use **company email addresses** (no personal domains such as Gmail/Outlook).
- The link expires after **24 hours**. If expired, a new verification email/link may be sent automatically.
- If verification attempts are exhausted and the link becomes invalid, contact Infobip for assistance.

Branded Calling Onboarding

1 Applicant Information — 2 Business Details — 3 Business Identity — 4 Customer Contacts — 5 Agent Of Record — 6 References — 7 Display Identity

References

Two internal business references are required for verification to confirm business identity and validate all call presentations. Ideally, this is done through documented phone verification; however, email verification is acceptable if phone contact is not possible.

For external financial reference, please provide contact information for one of the following:

- A licensed CPA who works with your organization
- A financial institution that has a business relationship with your organization

To locate these references, please reach out to your organization's executive team, finance department, or telecom management, as appropriate.

Internal Business References

Important: Important: We'll verify your internal references via a link sent to each email below. Use a company email address (no personal domains like Gmail/Outlook). Emails can't be changed after submission, so double-check before continuing.

Reference One Name * Enter you Reference One Name	Reference One Title * Enter you Reference One Title
Reference One Phone * Enter you Reference One Phone	Reference One Email * Enter you Reference One Email
Reference Two Name * Enter you Reference Two Name	Reference Two Title * Enter you Reference Two Title
Reference Two Phone * Enter you Reference Two Phone	Reference Two Email * Enter you Reference Two Email

External Financial Reference

Financial Institution Name * Enter your Financial Institution Name	Street Address * Enter your Street Address
---	---

External Financial Reference (Required)

Provide one external financial reference such as a **bank** with an active business relationship with your organization.

Fields (required):

- Financial Institution Name
- Street Address, City, State, ZIP Code
- Contact Name (*must be someone at the institution*)
- Phone Number
- Email Address

3.2.7 Step 7: Display Identity Information

Your Display Identity defines how your brand appears in outbound calls.

Required fields:

- **Call-From Numbers** (*enter numbers separated by commas; up to 20 at a time*)

- **Caller Display Name** (*the name that is displayed during calls*)

Optional fields (recommended):

- Logo (*256 × 256, BMP format recommended*)
- Call Reason (*select from pre-approved list, or choose Custom*)

Important Notes:

- Your Caller Display Name should reflect your company name (or an approved brand name). Names unrelated to your organization may be rejected.
- Custom Call Reasons will be reviewed but are not guaranteed approval.

Multiple Display Identities

If your organization needs multiple branding profiles (e.g., multiple brands or business units), select the **plus (+)** option to add additional display identities with different numbers, display names, logos, and call reasons.

LOA (Letter of Authorization)

Infobip only allows associating Call-From Numbers that you have acquired from Infobip to a Display Identity. Externally sourced numbers are not supported. Therefore, you do not need to provide a LOA whose purpose would be to confirm authorization to use the Call-From Numbers

Supporting Documents

Use **Upload Documents** to add **required** supporting files:

- For all customers: Infobip Invoice or screen capture from the Infobip portal confirming the Call-From numbers are associated to your Infobip account.
- For platform / BPO type customers, who are registering Display Identities on behalf of their own customers, an LOA from your customer granting you the right to register their brand assets on their behalf is required and must be uploaded in this section. The LOA template can be downloaded from the Infobip Branded Calling ID product documentation (in the subsection “Onboarding as a Platform or BPO customer”).

Branded Calling Onboarding

1 Applicant Information — 2 Business Details — 3 Business Identity — 4 Customer Contacts — 5 Agent Of Record — 6 References — 7 Display Identity

Display Identity Information

Your Display Identity defines how your brand appears in outbound calls. You must provide a Caller Display Name and a list of phone numbers using the required Excel template. Call Logo and Call Reason are optional. To add numbers, download the Telephone Numbers Template, fill it in, and upload it. Also upload supporting documentation (e.g. bill or invoice) that confirms ownership of these numbers. Logos must be 256x256 BMP. Content must follow SHAFT and IP guidelines. Custom Call Reasons will be reviewed, but are not guaranteed approval.

Call From Number(s) *
7586254110, 6983421780, 9872365430

Caller Display Name *
VitaCare

Upload Call Logo

Call Reason
Customer Service

Download LOA Template

Upload Documents

VitaCare LOA Signed.pdf X

Invoice Statement.pdf X

Upload LOA

Previous Save & Next

3.3 Registrant Obligations & Final Submission

After Step 7, a Registrant Obligations pop-up will appear:

- Review the obligations and confirm compliance.
- Enter **Registrant Full Name**.
- Confirm the **Submission Date** (auto-filled).
- Check the box: “I certify that I have read and agreed... and that all information provided is true and accurate.”
- Select **Submit**.

Certification

By checking the box below, you certify that:

- You have read and understood the **Registrant Obligations** outlined above.
- All information provided in this Application is accurate, true, and complete.
- You agree to comply with all the requirements and responsibilities described herein.

Registrant Full Name*

Enter your Full Name

Date of Submission*

Enter Date of Submission

I certify that I have read and agree to the **Registrant Obligations**, and that all information provided is true and accurate.

After submitting, you will receive a confirmation pop-up that includes your **Application ID**, and your application status will become **Pending Review**.

Branded Calling Onboarding

1 Applicant Information | 2 Business Details | 3 Business Identity | 4 Customer Contacts | 5 Agent Of Record | **Entity Created/Updated Successfully** | Identity

Display Identity Information

Your Display Identity defines how your brand appears in outbound calls. You must provide a Caller Display Name and a list of phone numbers using the required Excel Numbers Template, fill it in, and upload it. Also upload support documents. The image must be 256x256 BMP. Content must follow SHAFT and IP guidelines.

Call From Name

Enter your name

VitaCare LOA Signed.pdf Invoice Statement.pdf

Application Submitted

Thank you for submitting your application. Application Id: 1740703372351

You will receive an email in 10 days to confirm your registration. If any issues are found, our team will reach out.

Follow your progress on the [Branded Calling Status Page](#).

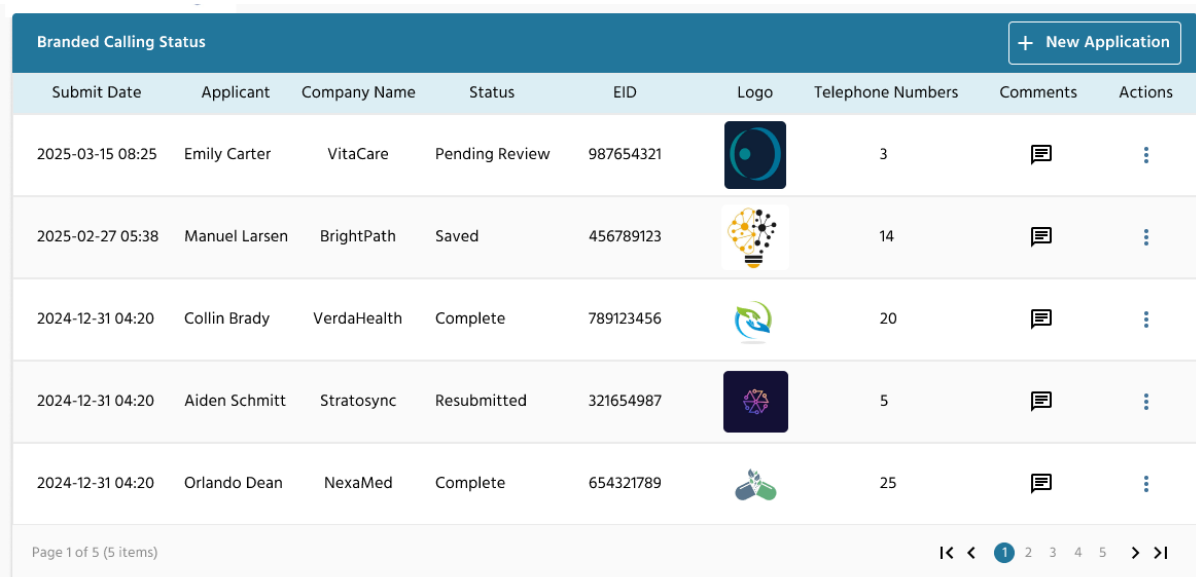
You will receive a notification once the application is approved, rejected, or if additional information is required during vetting.

3.4 What to Expect After You Submit Your BCID Application
















After you submit your BCID application, it will enter the **vetting process**. During vetting, one of the following outcomes will occur:

Approved (No Additional Information Needed)

Your application may be approved without requiring any extra documents or clarification. Once approved, your status will move to **Complete**, and your Display Identity becomes active for branded calling.



The screenshot shows a table titled "Branded Calling Status" with a "+ New Application" button in the top right. The table has columns for Submit Date, Applicant, Company Name, Status, EID, Logo, Telephone Numbers, Comments, and Actions. There are five rows of data. The first row shows a "Pending Review" status for VitaCare. The second row shows a "Saved" status for BrightPath. The third row shows a "Complete" status for VerdaHealth. The fourth row shows a "Resubmitted" status for Stratosync. The fifth row shows a "Complete" status for NexaMed. At the bottom, there is a pagination indicator "Page 1 of 5 (5 items)" and a navigation bar with buttons for back, forward, and page numbers 1 through 5.

Submit Date	Applicant	Company Name	Status	EID	Logo	Telephone Numbers	Comments	Actions
2025-03-15 08:25	Emily Carter	VitaCare	Pending Review	987654321		3		
2025-02-27 05:38	Manuel Larsen	BrightPath	Saved	456789123		14		
2024-12-31 04:20	Collin Brady	VerdaHealth	Complete	789123456		20		
2024-12-31 04:20	Aiden Schmitt	Stratosync	Resubmitted	321654987		5		
2024-12-31 04:20	Orlando Dean	NexaMed	Complete	654321789		25		

Flagged Step (Additional Information Required)

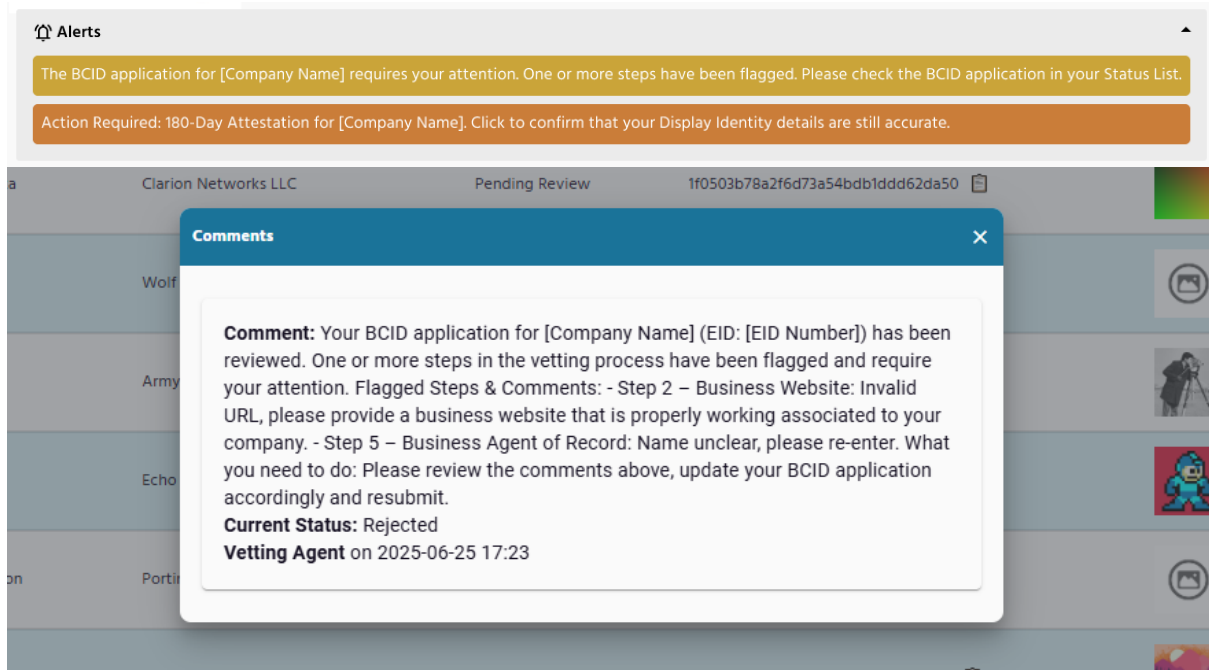
In some cases, a specific step in your application may be **flagged** during vetting. A flagged step means the vetting team needs **additional information**, such as:

- Clarifications to submitted details
- Supporting documents
- Corrections to specific fields

You will be notified in two places:

1. **Alerts Widget** on the Dashboard
2. **Comments column** in the **Status List** (message icon with a red indicator)

Infobip is also notified immediately when a step is flagged, so you can always contact us for status updates or guidance.



How to Resubmit After a Step is Flagged

If your application is flagged, resubmission is simple:

1. Go to **Branded Calling > Status List**
2. Find the flagged application and open the **Actions (three-dot menu)**
3. Select **Edit**
 - a. **Important:** Only the step(s) that were flagged will be editable. For example, if Step 3 was flagged, you will only be able to update **Step 3**, while the remaining steps stay locked to prevent unnecessary changes.
4. Update the requested information and select **Save & Next** to continue
5. Proceed through Step 7 and submit again
 - a. The **Registrant Obligations** pop-up will appear again
 - b. Enter your name, check the certification box, and select **Submit**

Once resubmitted, your application returns to vetting for review until it is approved or further information is requested.

Stay Informed

To stay updated on your application:

- Check your **portal Alerts** regularly
- Review the **Comments** column in the Status List
- Contact Infobip if you have questions or need help resolving a flagged step

4 Adding A New Display Identity

You can add a new Display Identity to an existing BCID application that has already been approved. This allows you to create additional branded profiles (e.g., different brands, business units, or use cases).

1. Start a New Display Identity

- In the **Display Identity table**, locate the **New Display Identity** button in the top-right corner
- Select **New Display Identity**



DIR ID	Display Name	Company Name	Status	Modified Date (ET)	Actions
1f0fbd395f4ef6f87894fe3ba61f856d7	New DIR ID	My legal name	Active	01/27/2026 10:57 PM	⋮
1f0bf50b62c369e1808b17f500a7f19d	display	My legal name	Active	01/27/2026 10:57 PM	⋮

2. Select the BCID Application

- A pop-up will appear prompting you to select a BCID application
- Use the dropdown to choose the approved application where you want to add the new Display Identity
- Select **Save & Next**

Note: Only BCID applications that are **fully approved** will be available in this list.

3. Enter Display Identity Details

- You will be taken to a form similar to **Step 7 of the BCID application**, where you must enter:
- **Call-From Numbers** (*required*) – Enter the phone numbers you want to use
- **Caller Display Name** (*required*) – The name that will appear during calls

Optional fields:

- **Call Reason**
- **Logo** (*256 × 256 BMP recommended*)

Use **Upload Documents** to add **required** supporting files:

- For all customers: Infobip Invoice or screen capture from the Infobip portal confirming the Call-From numbers are associated to your Infobip account.
- For platform / BPO type customers, who are registering Display Identities on behalf of their own customers, an LOA from your customer granting you the right

to register their brand assets on their behalf is required and must be uploaded in this section. The LOA template can be downloaded from the Infobip Branded Calling ID product documentation (in the subsection “Onboarding as a Platform or BPO customer”).

4. Acknowledge and Submit

- Select the checkbox:
“By submitting this new display identity, I acknowledge that a fee will be applied to my account.”
- Select **Submit**

Add New Display Identity - HorizonWave Technologies Inc.

Display Identity Information

Your Display Identity defines how your brand appears in outbound calls. You must provide a Caller Display Name and a list of phone numbers. Call Logo and Call Reason are optional. Upload supporting documentation (e.g. bill or invoice) that confirms ownership of these numbers. Logos must be a 256x256 BMP image with 32-bit depth. Content must follow SHAFT and IP guidelines. Custom Call Reasons will be reviewed, but are not guaranteed approval.

Call From Number(s)*
813-981-8164

Caller Display Name*
HorizonWave Support

Upload Call Logo

Call Reason
Responding to Your Inquiry

Upload LOA*

Upload Documents*

Download LOA Template

By submitting this new Display Identity, I acknowledge that a fee will be applied to my account.

Submit

5. Review & Approval

After submission:

- A confirmation pop-up will appear indicating your request has been submitted for review
- Review typically takes **2-7 business days**
- If additional information is required, you will be contacted

6. Track Status

- The new Display Identity will appear in the table with status **Pending Review**
- Once approved, the status will change to **Active**

Once active:

- You can begin placing calls using the associated phone numbers
- Your branding (name, logo, call reason) will appear on supported devices

5 180-Day Attestation & Annual Re-Verification

To remain active in the BCID ecosystem, enterprises must periodically confirm that their business and branding information remains accurate.

5.1 180-Day Attestation

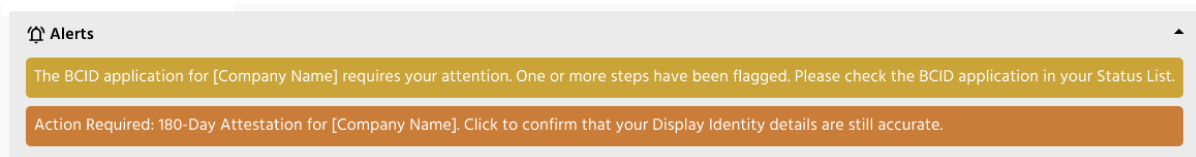
Every **180 days**, enterprises are required to attest that the information submitted in their BCID application is still accurate.

How You Are Notified

- You will receive an **Alert notification** in the Dashboard
- You will receive an **email notification** to the email used for your BCID onboarding
- Infobip **is notified at the same time**
- The alert appears approximately **10 days before the 180-day deadline**

The alert message will be similar to:

“Action Required: 180-Day Attestation for [Company Name]. Click to confirm that your display identity details are still accurate.”



Failure to complete the 180-Day attestation may result in the deactivation of your BCID Application – including all approved Display Identities. Make sure you are acting on the email notifications!

Completing the 180-Day Attestation

1. Click the alert to open the **180-Day Attestation Required** table
2. Locate your BCID application and select **Actions (three-dot menu) > View**

Last Modified Date	Applicant	Company Name	Status	EID	Logo	Telephone Numbers	Actions
2025-03-15 08:25	Emily Carter	VitaCare	Complete	987654321		3	⋮
2025-03-11 03:54	Manuel Larsen	BrightPath	Complete	456789123		14	⋮

You will be taken through the **7-step application** with your previously submitted information displayed.

At the end, choose one of the following:

No Changes Needed

- Select No Changes Needed
- A confirmation pop-up will appear
- Your attestation is complete

The screenshot displays a user interface for an application. It features three main sections: 'Applicant Information', 'Business Entity Details', and 'Business Identity Details'. A green banner at the top right indicates 'Entity Updated Successfully'. A blue banner in the center reads '180-Day Attestation Submitted'. A white pop-up box in the center contains the text: 'Thank you! Your 180-day attestation has been recorded. No further action is required.' and a 'Go To Dashboard' button.

Applicant Information			
First Name	Last Name	Email Address	Phone Number
Ricardo	Martinez	ricardo.martinez@pulsemedsystems.com	312-555-6184

Business Entity Details			
Legal Business Name	Business Website	Address Line 1	City
PulseMed Health Systems Inc.	www.pulsemedsystems.com	1500 Harmony Medical Plaza, 5th Floor	Chicago
State			
IL			

Business Identity Details			
Federal Employer ID Number		State Professional License Number	
59-3048271	N/A	N/A	N/A
Primary Business Domain (SIC Code)			

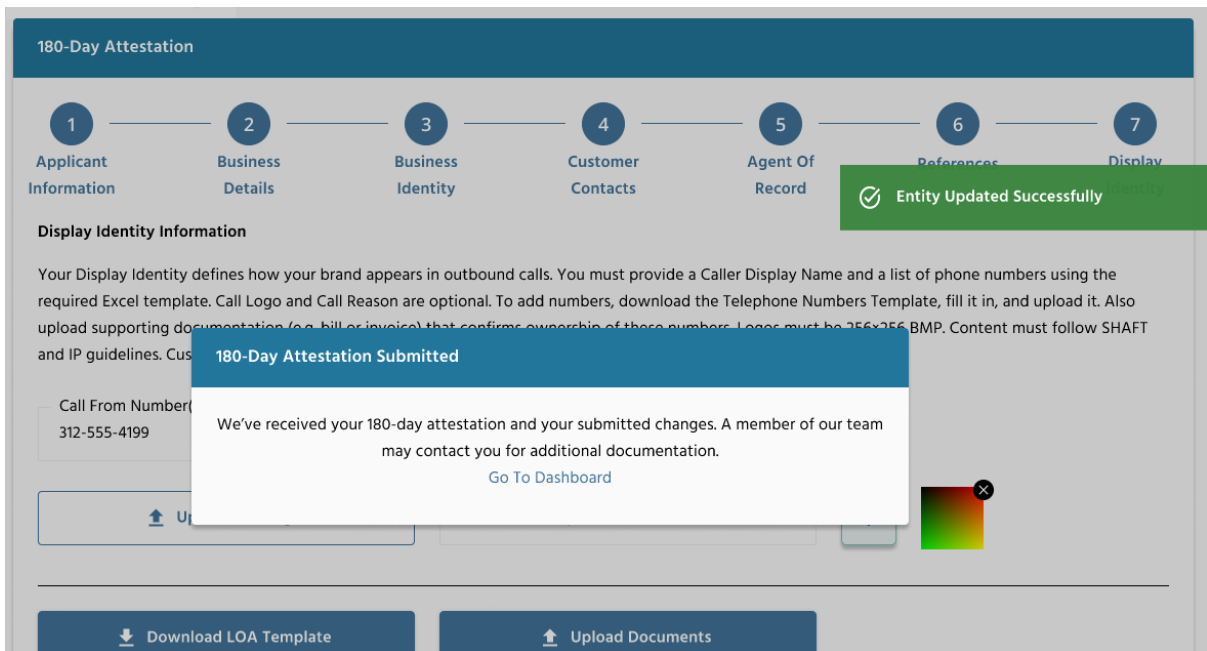
Update Required

If any information has changed (e.g., FEIN, references, business details):

1. Select **Update Required**
2. Navigate to the step that needs updating
3. Select **Edit**, update the information, then **Save & Next**
4. Continue to Step 7 and submit

A confirmation message will appear stating that your attestation and updates were received.

Infobip is notified when the attestation is submitted.



Important:

During the 180-day attestation process:

- Your Display Identities **remain active**
- Branded calls **continue without interruption**
- Status may show **Pending Review** or **In Progress** while reviewed

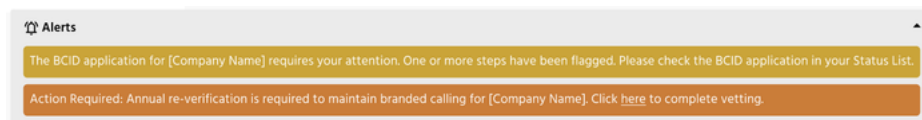
5.2 Annual Re-Verification (Required)

Once per year, enterprises must complete a **full annual re-verification**. This is a required review to confirm continued eligibility in the BCID ecosystem.

Failure to complete the annual re-verification may result in the deactivation of your BCID Application – including all approved Display Identities. Make sure you are acting on the email notifications!



How Annual Re-Verification Works

- You will receive an **Alert notification** in the Dashboard
- **Infobip receives an email notification**
- Selecting the alert opens a **Re-Verification Required** table



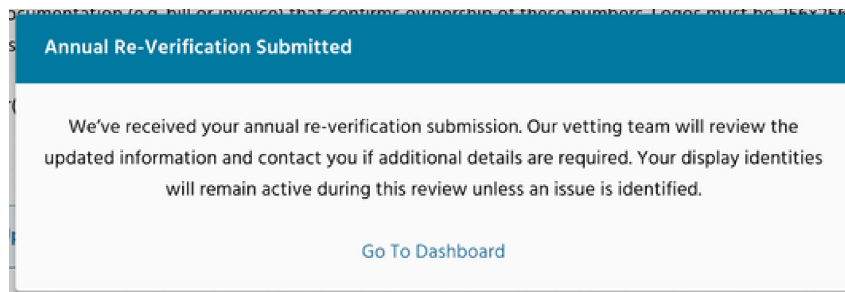
1. Select **Actions > Review**
2. You will be taken through the **full 7-step application**
 - All fields are **editable**

- Previously submitted data is pre-filled
- 3. Review and update any information as needed
- 4. Complete Step 7 and select **Save & Next**
- 5. Submit the application again

Annual Re-Verification Required (365 Days)						
As part of annual compliance, the applications below must go through a full re-verification. All information and documents will be reviewed again to confirm continued authorization. Please review and update any details as needed before submitting. Select "Actions" to continue.						
Last Modified Date	Applicant	Company Name	EID	Logo	Telephone Numbers	Actions
2025-03-15 08:25	Emily Carter	VitaCare	987654321		3	

After submission:

- A confirmation pop-up appears indicating **Re-Verification Submitted**
- Your application returns to the vetting process



Important Notes

- Display Identities **remain active** during annual re-verification
- Branded calling **does not pause**
- Vetting statuses may progress as:
 - **Pending Review** – recently submitted, awaiting review
 - **In Progress** – actively being reviewed
 - **Complete** – re-verification approved

Only in rare cases (e.g., impersonation or invalid business identity) would display identities deactivated.

You can track the outcome under **Branded Calling > Status List**.

If additional information is required, flagged steps may appear, and Infobip will assist.

6 Pre-Approved Call Reasons (Optional)

If you choose to include a Call Reason in Step 7, you may select from the following **pre-approved call reasons**. These do not require additional review.

Approved Call Reasons:

- Account Alert
- Account Notification
- Account Services
- Accounting Department
- Agent Call Back
- Appointment Confirmation
- Appointment Reminder
- Confirm Appointment
- Confirm Card Use
- Confirm Order
- Confirm Receipt
- Confirm Status
- Customer Service
- Delivery ETA
- Flight Arrival
- Flight Boarding
- Flight Cancellation
- Flight Delay
- Follow-Up Calls
- Fraud Alert
- General Support
- Identity Verification
- Investor Relations
- Item Ready
- Order Confirmation
- Order Ready
- Policy Update
- Recall
- Reschedule Request
- Reservation Ready
- Responding to Your Inquiry
- Response Requested
- Returning Your Call
- Rx Ready
- Sales Call
- School Closing Alert
- Service Outage Notification
- Snow Alert
- Technical Support
- Today's Delivery

- Upcoming Delivery
- Verification Code
- Weather Alert
- Your Account
- Your Order

7 Terminology

BCID Application: A BCID Application is a required 7-step registration process that a business must complete and submit to get approved for making branded calls. Its primary purpose is to securely verify your organization's identity and authorize the specific brand information you want to present to consumers.

The application collects two main types of information:

- **Business Verification Details:** Standard corporate information used to prove your business is legitimate, including your legal business name, Federal Employer Identification Number (FEIN), registered agent, and professional references.
- **Display Identity Information:** The actual branding elements you want to use, including the specific phone numbers you will call from, your requested Caller Display Name, and an optional logo or call reason.

Once submitted, the application undergoes a standard vetting process to ensure accuracy and compliance before your brand data is authorized to appear on recipients' screens

Display Identity: A Display Identity is the specific branding profile that defines exactly how your company appears on a recipient's mobile screen during an outbound call. It acts as the configuration that links your designated outbound phone numbers (the "Call-From" numbers) to your verified **Caller Display Name**. Beyond the name and numbers, a Display Identity can also encompass optional rich call elements, specifically your vetted company **Logo** and a selected **Call Reason**.

Key characteristics of a Display Identity include:

- **Flexibility for Multiple Brands:** If your organization operates various brands, departments, or business units (e.g., one for "Pharmacy" and another for "Customer Support"), you can create multiple unique Display Identities to ensure the caller information is highly relevant to the specific call.
- **Active Status Tracking:** Once submitted and successfully vetted, the Display Identity becomes "Active," meaning this approved branding is officially live and being presented to consumers on your outbound calls.
- **Updatable:** You can submit change requests to an existing Display Identity—such as updating the logo or adding new phone numbers—while the current version remains active during the review process.

Call-From Numbers: The specific list of outbound phone numbers that are authorized and linked to your Display Identity. These are the numbers that will trigger your brand information to appear on the recipient's screen when a call is placed.

Call Reason (or Reason for Call): An optional, short text message (limited to 35 characters) included as part of your Display Identity that tells the call recipient the exact purpose of your call before they answer. When setting up your branding, you can choose from a list of pre-approved call reasons—such as "Appointment Reminder," "Customer Service," or "Fraud Alert"—which are recommended for faster processing.

Flagged Step: A status that may appear during the vetting of your application, indicating that the review team requires additional information, clarification, or a

correction for a specific section. When resubmitting, only the flagged step will be editable.

180-Day Attestation: A mandatory compliance check occurring every 180 days where you must log in and confirm that your previously submitted business details and branding information are still accurate. Your display identities remain active during this process.

Annual Re-Verification: A required, comprehensive yearly review of your entire BCID application to confirm your continued authorization and eligibility in the Branded Calling ecosystem. Like the 180-day attestation, your branded calls will not pause during this review.

Change Request: A formal submission to update an existing, active Display Identity—such as modifying the display name, changing the logo, or adding new Call-From Numbers. Your existing branding remains live and uninterrupted while the new changes are being reviewed.

SHAFT Guidelines: Industry content standards that you must agree to during registration. They dictate that your Caller Display Name, Logo, and Call Reason cannot contain any prohibited content related to **Sex/Adult Content, Hate Speech, Alcohol, Firearms, or Tobacco.**

Impression (Confirmed Branded Call): A successful event where your verified brand information—such as your company name, logo, and call reason—is officially confirmed to have been delivered and displayed on the call recipient's mobile screen. They can alternatively be designated as "Confirmed Branded Calls".

Settlement (Settlement Report): The automated process and resulting data that tracks your successful brand impressions for billing and analytics. Because you are only charged a fee for calls where your branding is successfully confirmed on the recipient's device, the Settlement Report allows you to view the exact number of confirmed deliveries and monitor the performance of your active Display Identities

8 Frequently Asked Questions

1. How long does vetting take?

- Typically, **2–10 business days**. Status updates appear in **Status List**, and notifications may be sent by email.

2. What if my application is rejected?

- Review the **Comments**, address the issues, select **Edit**, and resubmit.

3. I lost my login link—what should I do?

- Contact **Infobip** to resend or issue a new invitation

Need Assistance?

- Contact **Infobip** for login issues, corrections, or application support
- Monitor your email and portal alerts for status updates or requests

By following these steps, you can confidently submit, manage, and maintain your BCID application—ensuring your branded calls remain trusted and recognized once your status is **Complete**.