MyRepChat®
User Guide

This is reference guide on how to use MyRepChat for texting with clients. This document is meant to serve as a reference guide only and while we maintain this document regularly, please note that processes change often. Where these processes differ from FINRA, SEC, or MyRepChat guidance, those guidelines and rules shall prevail. This is for reference purposes only.
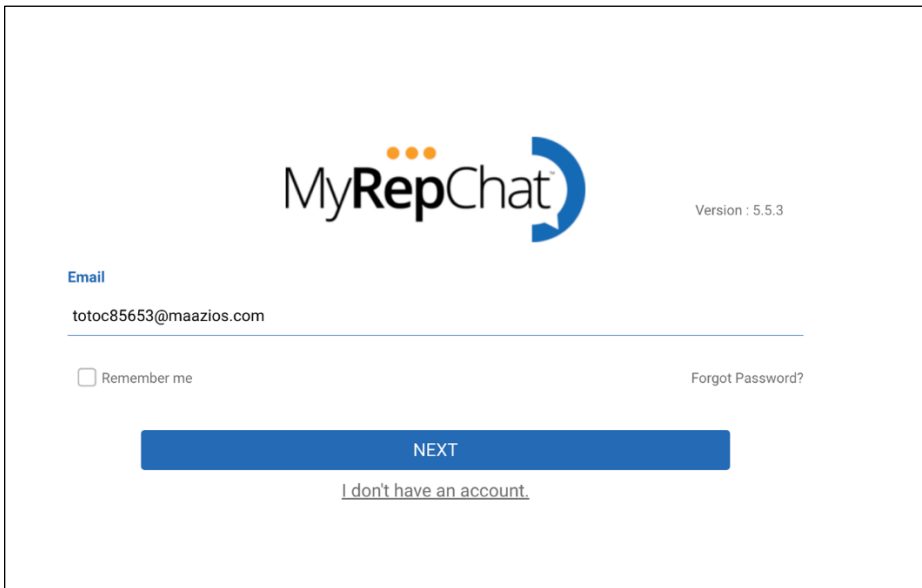
Signup Process

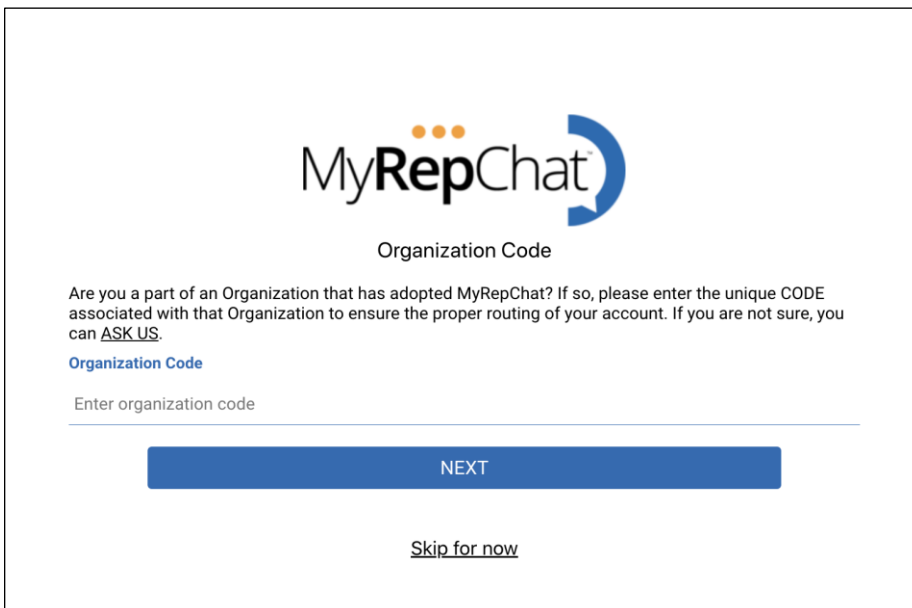To sign up for MyRepChat, view a demo or view FAQ's please click on the following link:
https://ionlake.com/cetera-and-myrepchat/

How to get Started with MyRepChat Video

Go to dart.ionlake.com
- Enter your email and select I don't have an account.

Enter your organization code - found from this link: https://ionlake.com/cetera-and-myrepchat/

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Enter your cell phone number for verification. We use this number to call or text for verification.

Verify Cell Phone Number

Please enter your personal cell phone number and click "Call" or "Text" to receive a confirmation code (standard message rates apply).

Phone Number Only

CALL	TEXT	CANCEL

Enter you name, email, and create a password. Click Finish.

MyRepChat

Your Name
Enter Your Name

Email
Enter Email

Password
Enter Password

Confirm Password
Confirm Password

FINISH

I have an account. Login Here

We need to verify your email address. A verification code to your email to verify. The email will be sent from noreply@ionlake.com

MyRepChat

We sent an email with a verification code to totoc85653@maazios.com. Please find the email and enter the verification code from the email into the space provided below. Don't forget to check your junk mail.
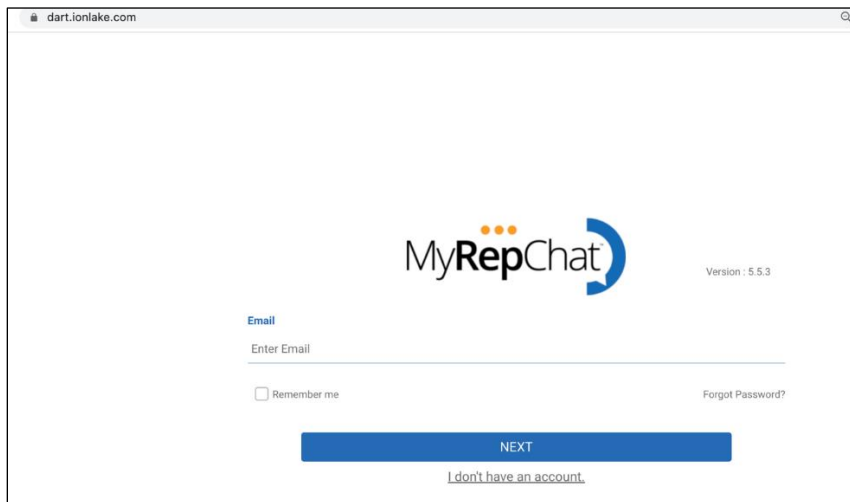
Verification Code*
Enter Verification code

NEXT

BACK

How to Log into MyRepChat from a Computer

Now that your account is complete, to continue you will need to log in using the username (email) and password that you created during the sign-up process. Go to Dart.Ionlake.com to sign in and walk thru the setup process.
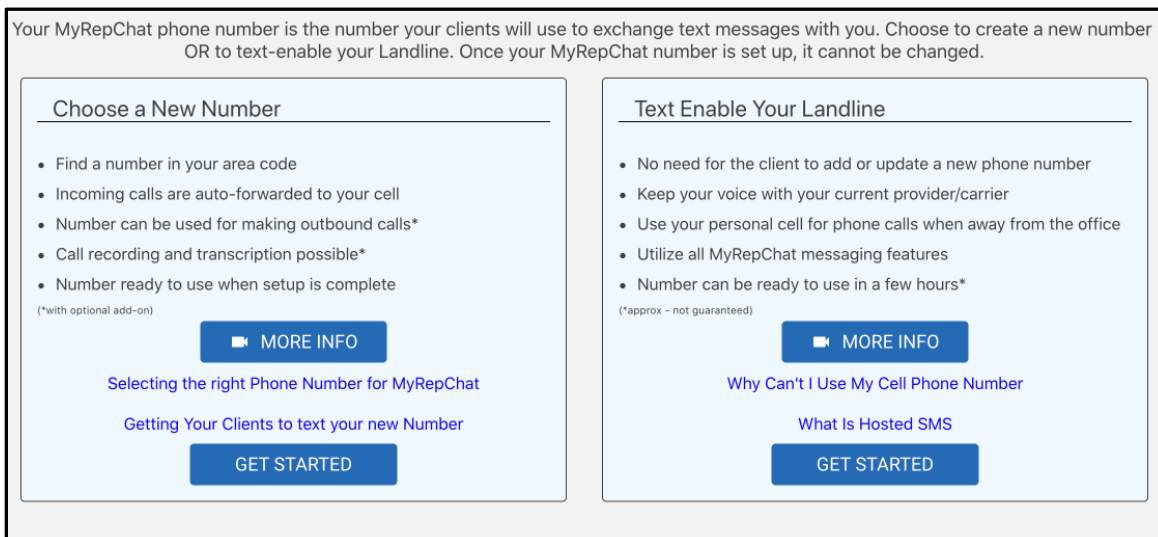

Setup your Account

Determine which MyRepChat number is right for your business needs. The MyRepChat is the number you will use for texting clients. The two choices are: Choose a new number or Text Enable Your Landline

Pros and cons of picking a new number versus using an existing number.

Should I choose a new number?

Should I use an existing number?

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Choose a New Number

Upon entering an area code, you can choose from a list of available numbers. Please keep in mind that not all area codes have available numbers, and you can refresh the list or change area codes if you prefer.

Select a number from the drop down menu, you want as your MyRepChat number.

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Text Enable your Landline

Select – Text Enable Your Landline – Get Started

Enter the number you want to text enable.

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Start the Letter of Authorization DocuSign process:

Review the DocuSign and click continue.

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Sign the docusign to complete and Click Finish.

If you want to download, print or close the DocuSign form.

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DocuSign is complete – the form is sent to Support at MyRepChat for processing.
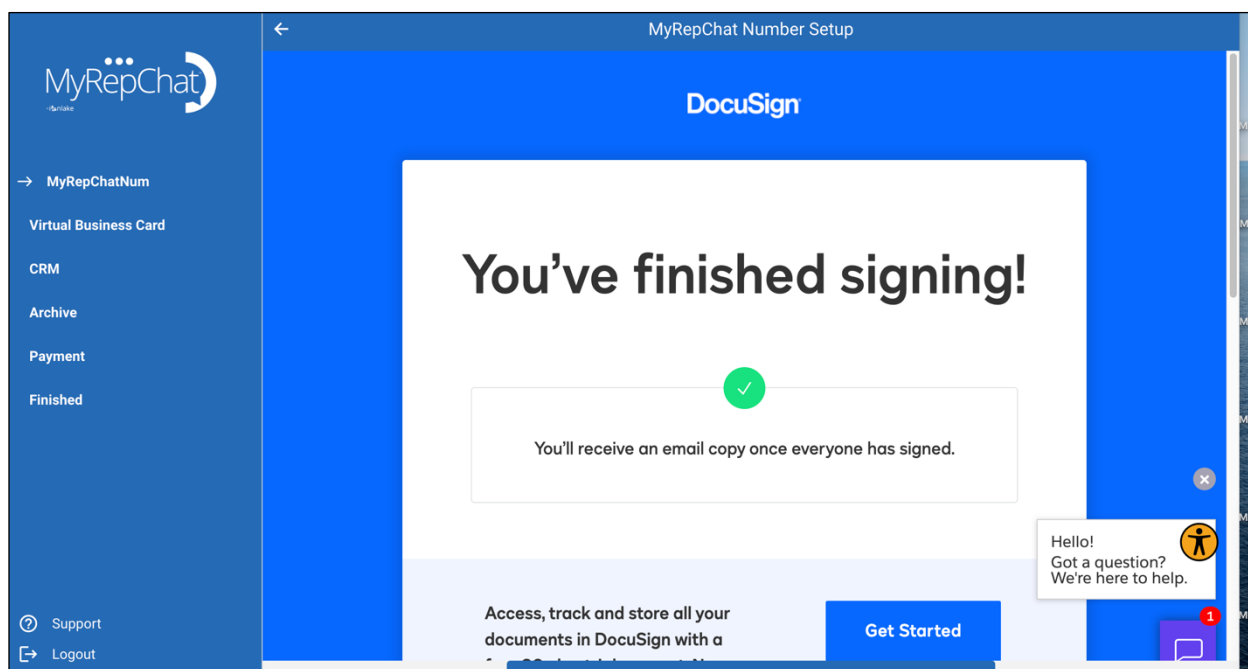
Setup your Virtual Business Card

Per Cetera: A vCard is required to have your MyRepChat account approved by Advertising Review once created. The virtual business card you can set up under MyRepChat's Settings > Profile menu serves as an electronic format of your paper business card. We recommend you include all information that you're prompted to personalize (name, company name, title, email, address, phone number).

You will also be required to enter your broker-dealer's disclosure in the notes section—this will be the same as what appears on either your approved email signature block or printed business card.

Integrate with your CRM. If you connect your CRM uploading contacts is simple. This step allows you the opportunity to connect your CRM to MyRepChat.
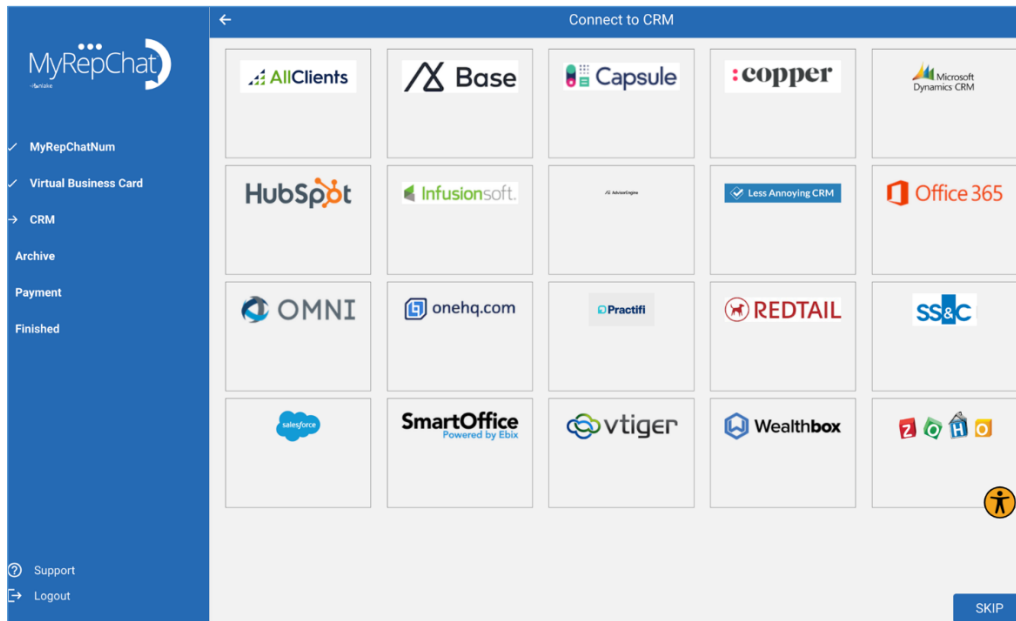
Cetera handles the archiving setup for MyRepChat users. No action is required from you.

Credit Card Setup

The monthly subscription cost for MyRepChat is $10 for Cetera-affiliated financial professionals. MyRepChat will collect your payment directly; Cetera will not be involved in billing.
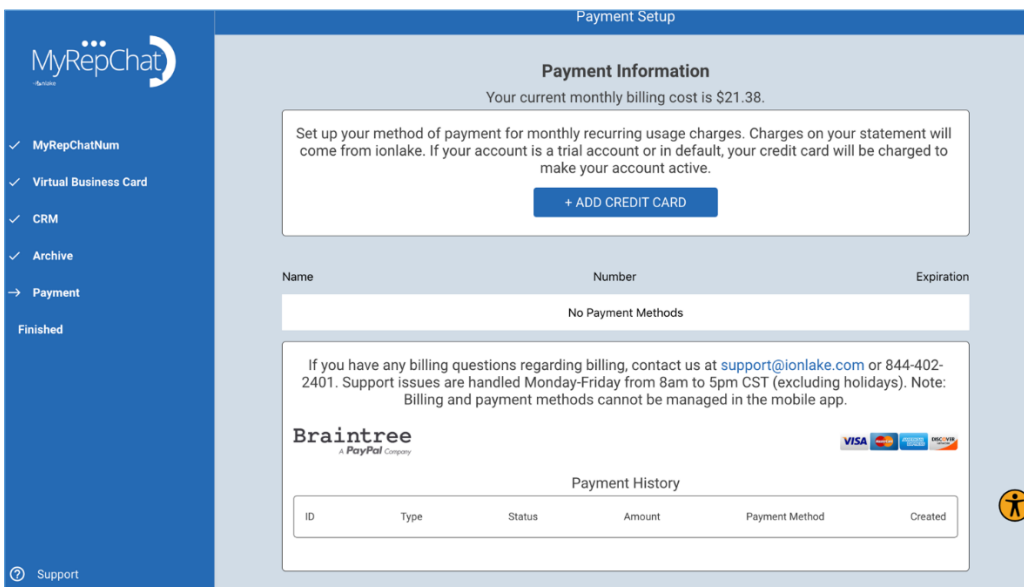
Once you have completed your account setup, your account will be sent to Cetera Advertising Review to approve and activate.

How to Send a Message

From the Message Tab, you can view and create messages. NOTE: Client needs to be sent the consent before text messages can be sent or scheduled.

Cetera consent message: Hi, it's (First and Last Name from Virtual Business Card) with (Business Name from Virtual Business Card). This is my business mobile number, feel free to call or text. Text STOP to stop receiving these texts at any time.

- To send a message click on the messages tab, then select an existing chat, or select the

- To start a conversation either enter the name of your client and pull in First Name, Last Name and Mobile number from the CRM or click Quick Create to create a new contact.
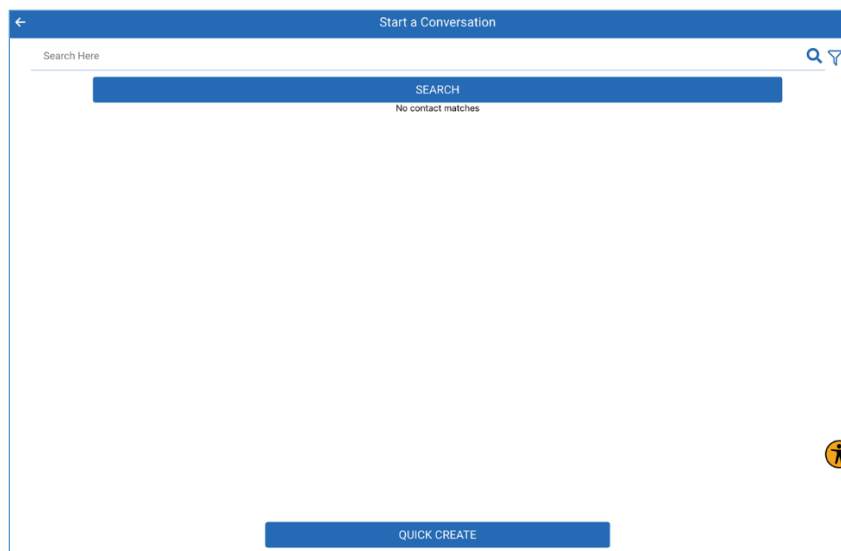
Send the consent by clicking the paper airplane, then you can then text the client.

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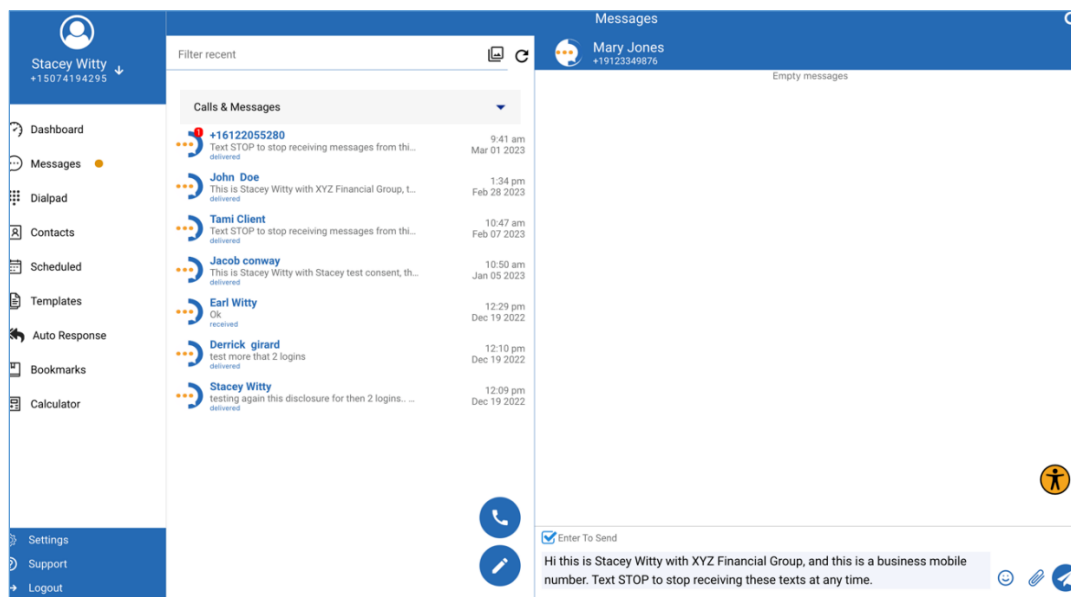
From the message screen, click the paper clip for the other functionality.
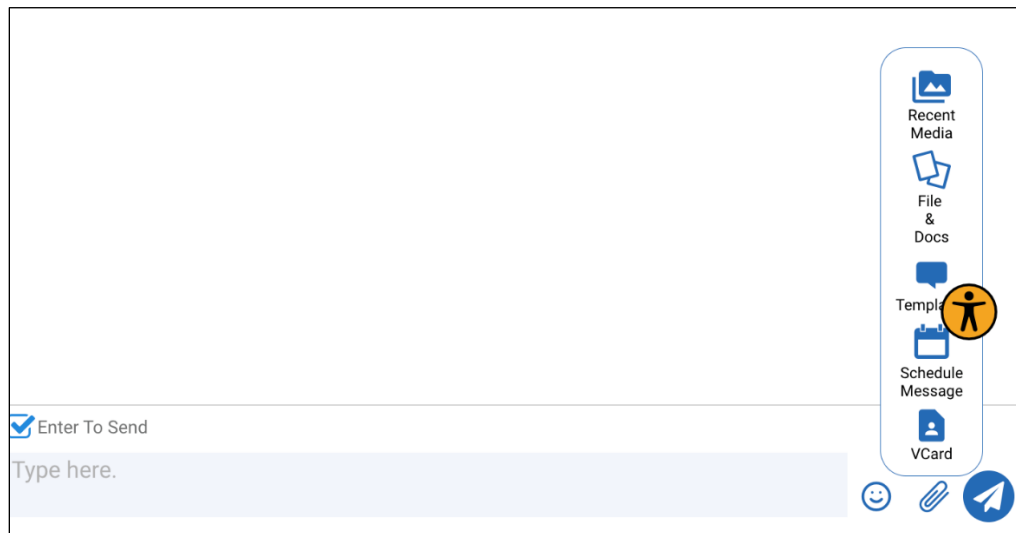
Scheduled Messages

Scheduled messages allow you to create a reminder text for your client's next appointment. You can schedule a message by date, time, and frequency.

Templates

Message Templates are great way to save time when sending a message multiple times by allowing you to type the message once and sending it as needed. You can easily recall a message template in the messages view by clicking the templates button.

Template Samples

You can use the following placeholders in your message template.

- **${contact.name}** - combined first and last name of the contact (formerly ${name})
- **${contact.firstname}** - first name of contact (formerly ${fname})
- **${contact.lastname}** - last name of contact (formerly ${lname})
- **${contact.address}** - the address line of the contact
- **${contact.city}** - the city of the contact
- **${contact.state}** - the state of the contact (two letter)
- **${contact.zip}** - the zip code of the contact

When the message is sent, these placeholders will be replaced with the values from the contact record.

To create your template – enter the name and message. Click Save.

←	Templates

Name Template*

Happy Birthday

Message*

Happy Birthday ${contact.firstname}! Have a great day!

SAVE
CANCEL

You can use the following place holders in your message

${contact.name} - combines first and last name of the contact (formerly ${name})
${contact.firstname} - first name of contact (formerly ${fname})
${contact.lastname} - last name of contact (formerly ${lname})
${contact.phone} - the messaging number of the contact
${contact.address} - the address line of the contact
${contact.city} - the city of the contact
${contact.state} - the state of the contact (two letter)
${contact.zip} - the zip code of the contact

When the message is sent, these place holders will be replaced with the values from the contact record.

Auto Responses

An auto response is a way to return an automatic reply to an incoming text message. An example would be to have MyRepChat send back a link to your calendar when someone sends the word "calendar" to your MyRepChat number.

You cannot create auto responses for built in keywords, including keywords that are used for adherence to the Telephone Consumer Protection Act (TCPA). The keywords you cannot use are:
- **vcard** (MyRepChat Keyword)
- **vcardlink** (MyRepChat Keyword)
- **contactinfo** (MyRepChat Keyword)
- **start** (TCPA Keyword)
- **stop** (TCPA Keyword)
- **stopall** (TCPA Keyword)
- **subscribe** (TCPA Keyword)
- **unsubscribe** (TCPA Keyword)
- **cancel** (TCPA Keyword)
- **end** (TCPA Keyword)
- **quit** (TCPA Keyword)
- **unstop** (TCPA Keyword)
- **help** (TCPA Keyword)
- **info** (TCPA Keyword)

Only the first auto response that meets the criteria of the incoming text will be used, make sure to order your auto responses to meet your requirements. An example would be if an unknown contact sends a keyword and you have an auto response for unknown contacts AND for the keyword, you need to specify which one should be used first by setting its order higher using the arrow buttons.
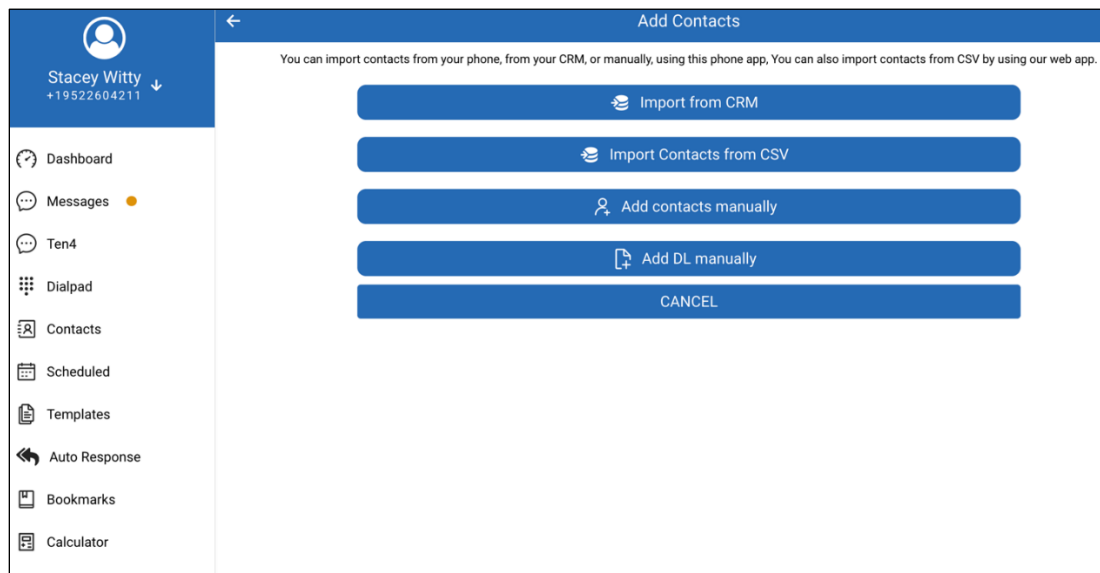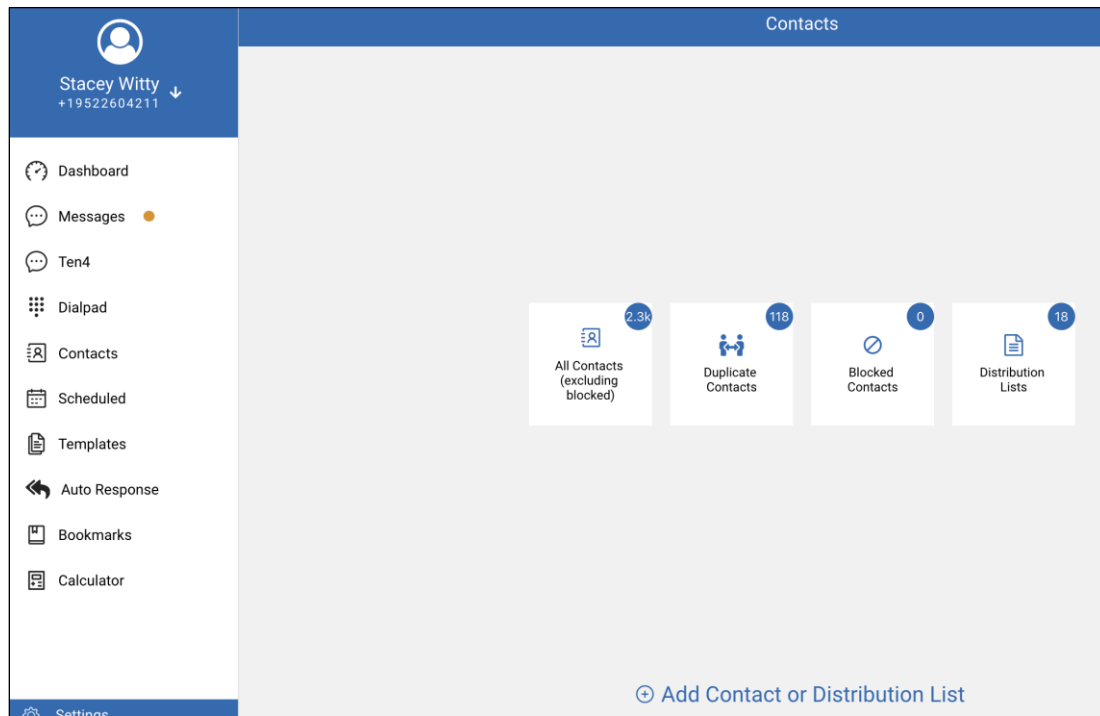
Create auto response – enter the key word and the auto response message.

Creating Contacts

Contacts can be added manually, from CSV, or from a CRM Integration.

Contact Section Support documentation

- Import from CRM
- Import Contact from CRM
- Add Contact Manually
- Add DL Manually (Distribution list)

Download MyRepChat® app

Download and install mobile app (available for Android and IOS) on your device. You can find it in the App store for Apple devices, or the Google Play store for Android devices- search for MyRepChat®.