

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.

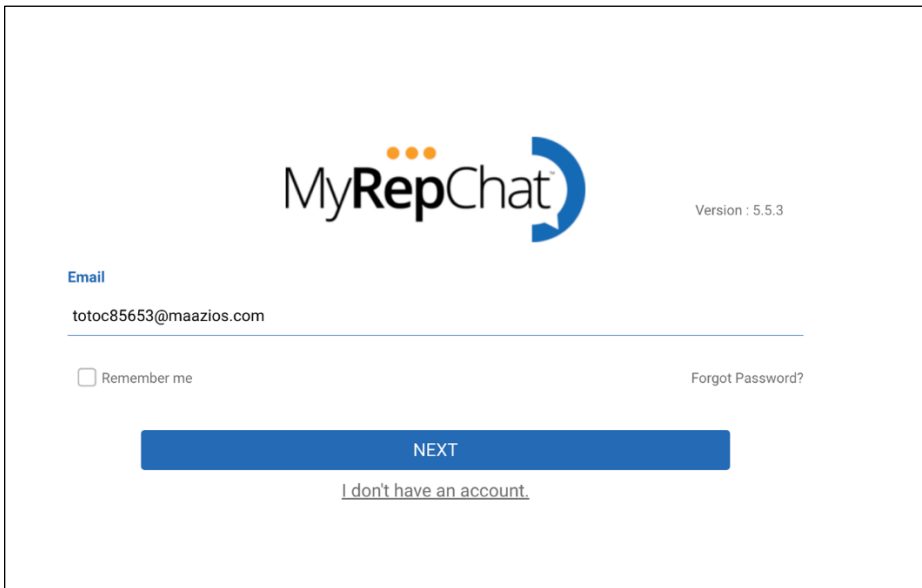
Signup Process

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

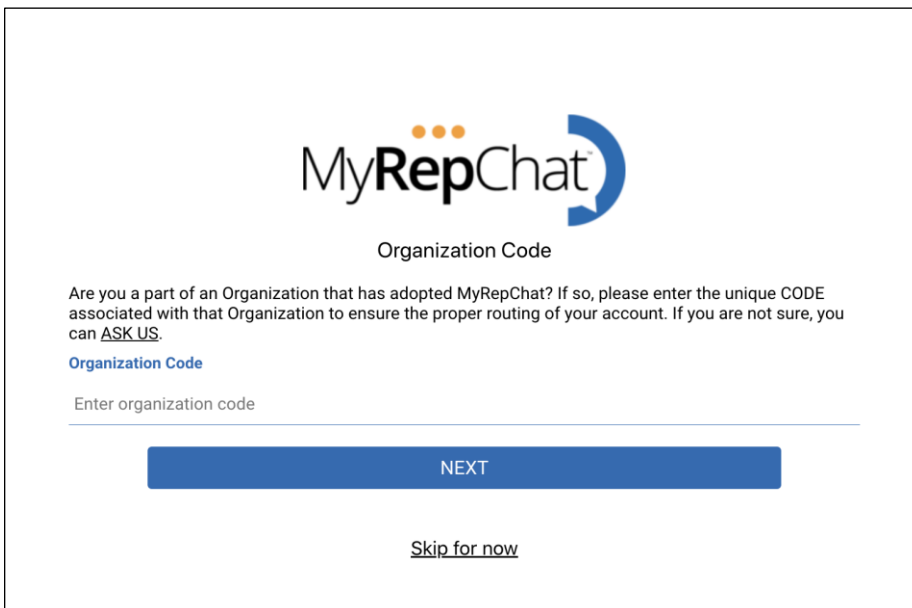
Go to dart.ionlake.com

- Enter your email and select I don't have an account.



The screenshot shows the MyRepChat login and registration interface. At the top center is the MyRepChat logo, which consists of the text "MyRepChat" followed by a blue circular icon with three orange dots above it. To the right of the logo, it says "Version : 5.5.3". Below the logo is an "Email" input field containing the text "totoc85653@maazios.com". Underneath the email field is a checkbox labeled "Remember me" and a link that says "Forgot Password?". At the bottom, there is a large blue button labeled "NEXT" and a link below it that says "I don't have an account".

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



The screenshot shows the MyRepChat organization code entry screen. At the top center is the MyRepChat logo, which consists of the text "MyRepChat" followed by a blue circular icon with three orange dots above it. Below the logo is the heading "Organization Code". Underneath is a paragraph of text: "Are you a part of an Organization that has adopted MyRepChat? If so, please enter the unique CODE associated with that Organization to ensure the proper routing of your account. If you are not sure, you can [ASK US](#)." Below this text is a link that says "Organization Code". Underneath is an "Enter organization code" input field. At the bottom, there is a large blue button labeled "NEXT" and a link below it that says "Skip for now".

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 your name, email, and create a password. Click Finish.



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



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*

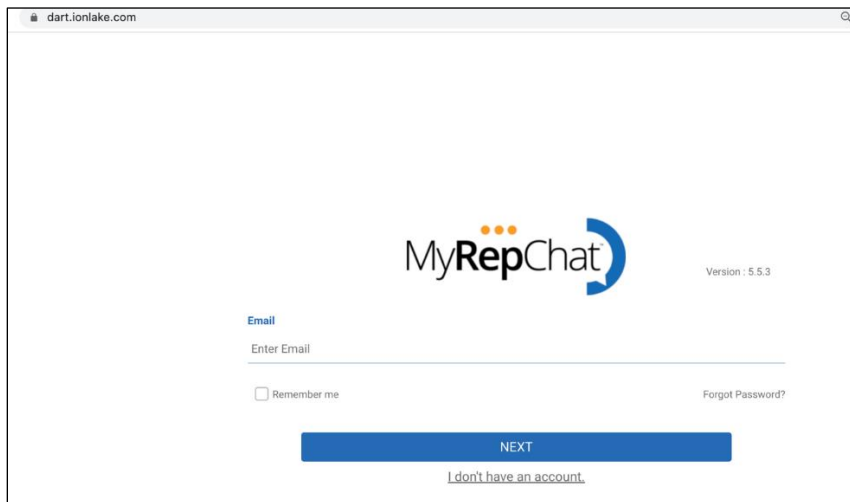
Enter Verification code

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.lionlake.com to sign in and walk thru the setup process.



dart.lionlake.com

MyRepChat Version : 5.5.3

Email
Enter Email

☐ Remember me [Forgot Password?](#)

NEXT

[I don't have an account.](#)

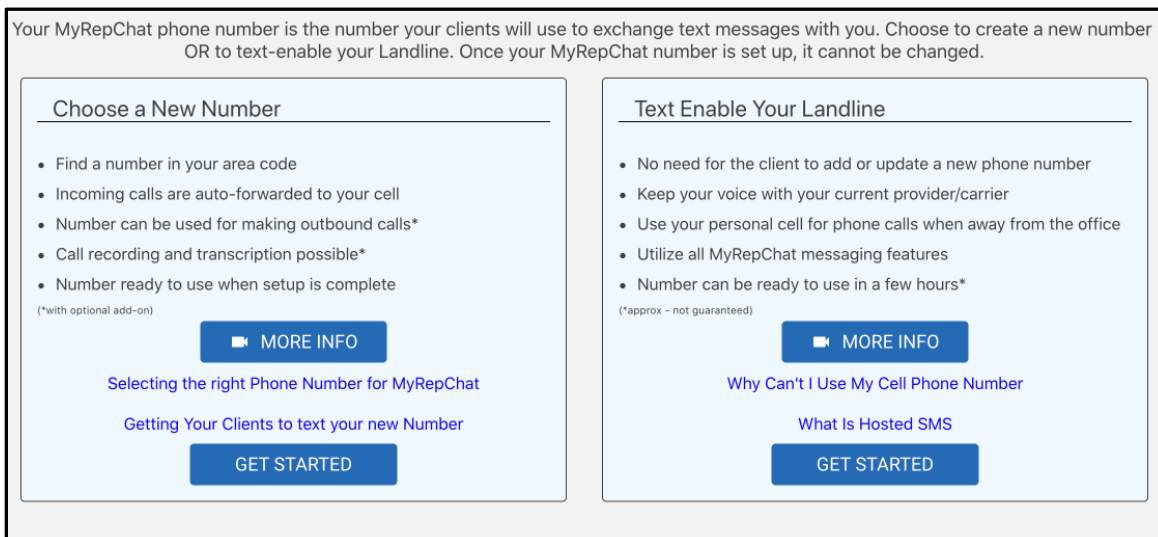
Setup your Account

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?](#)



Your MyRepChat phone number is the number your clients will use to exchange text messages with you. Choose to create a new number OR to text-enable your Landline. Once your MyRepChat number is set up, it cannot be changed.

Choose a New Number

- Find a number in your area code
- Incoming calls are auto-forwarded to your cell
- Number can be used for making outbound calls*
- Call recording and transcription possible*
- Number ready to use when setup is complete

(*with optional add-on)

MORE INFO

Selecting the right Phone Number for MyRepChat

Getting Your Clients to text your new Number

GET STARTED

Text Enable Your Landline

- No need for the client to add or update a new phone number
- Keep your voice with your current provider/carrier
- Use your personal cell for phone calls when away from the office
- Utilize all MyRepChat messaging features
- Number can be ready to use in a few hours*

(*approx - not guaranteed)

MORE INFO

Why Can't I Use My Cell Phone Number

What Is Hosted SMS

GET STARTED

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.

MyRepChat

→ MyRepChatNum

Virtual Business Card

CRM

Archive

Payment

Finished

MyRepChat Number Setup

To choose a new number to use for MyRepChat you will need to search for numbers that are in your area code, or an area code near you.

Type in an area code to begin

Area Code*

SEARCH

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

MyRepChat

→ MyRepChatNum

Virtual Business Card

CRM

Archive

Payment

Finished

MyRepChat Number Setup

To choose a new number to use for MyRepChat you will need to search for numbers that are in your area code, or an area code near you.

Type in an area code to begin

952

✓ (952) 522-5170(Twin Cities)

(952) 522-5145(Twin Cities)

(952) 522-5187(Twin Cities)

(952) 522-3384(Twin Cities)

(952) 522-4038(Twin Cities)

(952) 522-3401(Twin Cities)

(952) 522-4212(Twin Cities)

(952) 522-4058(Twin Cities)

(952) 522-3426(Twin Cities)

(952) 522-3503(Twin Cities)

(952) 522-4714(Twin Cities)

(952) 522-2654(Twin Cities)

(952) 522-4239(Twin Cities)

(952) 522-3309(Twin Cities)

(952) 522-4957(Twin Cities)

(952) 522-3307(Twin Cities)

(952) 522-3825(Twin Cities)

(952) 522-3382(Twin Cities)

(952) 522-4152(Twin Cities)

(952) 522-5161(Twin Cities)

(952) 522-5212(Twin Cities)

(952) 522-1670(Twin Cities)

(952) 522-4385(Twin Cities)

(952) 522-3477(Twin Cities)

(952) 522-4401(Twin Cities)

(952) 522-4226(Twin Cities)

(952) 522-9874(Twin Cities)

(952) 522-2784(Twin Cities)

(952) 522-4228(Twin Cities)

(952) 522-1658(Twin Cities)

Text Enable your Landline

Select – Text Enable Your Landline – Get Started

The screenshot shows the 'MyRepChat Number Setup' page. On the left is a blue sidebar with the MyRepChat logo and navigation links: MyRepChatNum, Virtual Business Card, CRM, Archive, Payment, Finished, Support, and Logout. The main content area has a blue header 'MyRepChat Number Setup' and a sub-header 'Your MyRepChat phone number is the number your clients will use to exchange text messages with you. Choose to create a new number OR to text-enable your Landline. Once your MyRepChat number is set up, it cannot be changed.' There are two main sections: 'Choose a New Number' and 'Text Enable Your Landline'. The 'Text Enable Your Landline' section is highlighted. It lists benefits: no need for client to add/update number, keep voice with current provider, use personal cell for calls, utilize all MyRepChat features, and number ready in a few hours. It includes a 'MORE INFO' button, a link 'Why Can't I Use My Cell Phone Number', a link 'What Is Hosted SMS', and a 'GET STARTED' button. A help icon is in the bottom right.

MyRepChat Number Setup

Your MyRepChat phone number is the number your clients will use to exchange text messages with you. Choose to create a new number OR to text-enable your Landline. Once your MyRepChat number is set up, it cannot be changed.

Choose a New Number

- Find a number in your area code
- Incoming calls are auto-forwarded to your cell
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- Call recording and transcription possible*
- Number ready to use when setup is complete

(*with optional add-on)

[MORE INFO](#)

[Selecting the right Phone Number for MyRepChat](#)

[Getting Your Clients to text your new Number](#)

[GET STARTED](#)

Text Enable Your Landline

- No need for the client to add or update a new phone number
- Keep your voice with your current provider/carrier
- Use your personal cell for phone calls when away from the office
- Utilize all MyRepChat messaging features
- Number can be ready to use in a few hours*

(*approx - not guaranteed)

[MORE INFO](#)

[Why Can't I Use My Cell Phone Number](#)

[What Is Hosted SMS](#)

[GET STARTED](#)

Support
Logout

Enter the number you want to text enable.

The screenshot shows the 'MyRepChat Number Setup' page at the 'SMS Enable a landline' step. The sidebar is the same as the previous screenshot. The main content area has a blue header 'MyRepChat Number Setup' and a sub-header 'SMS Enable a landline'. It lists three steps: Step 1 (Verify phone number), Step 2 (Sign Letter of Authorization), and Step 3 (Finish remaining steps). Below the steps are input fields for 'Area Code*', 'Prefix', and 'Last 4'. A 'VERIFY PHONE NUMBER' button is at the bottom. A help icon is in the bottom right.

MyRepChat Number Setup

SMS Enable a landline

Step 1 Verify your phone number by entering it below and clicking 'Verify Phone Number'.

Step 2 Sign the following Letter of Authorization form and click 'Continue' only once you've been instructed that all signing has been completed.

Step 3 Finish the remaining steps to complete setup of your MyRepChat account.

Area Code*

Prefix

Last 4

[VERIFY PHONE NUMBER](#)

Support
Logout

Start the Letter of Authorization DocuSign process:

The screenshot shows the 'MyRepChat Number Setup' page. On the left is a blue sidebar with the MyRepChat logo and navigation links: MyRepChatNum, Virtual Business Card, CRM, Archive, Payment, Finished, Support, and Logout. The main content area has a blue header with a back arrow, the MyRepChat logo, and 'BEGIN SIGNING' and 'HELP' buttons. The central white box is titled 'PowerForm Signer Information' and contains instructions to complete the form for the Hosted SMS Process. It asks for the signer's name and email. There are input fields for 'Full Name' and 'Email Address', each preceded by a red asterisk. A 'BEGIN SIGNING' button is at the bottom of the box. At the bottom of the page, there is a 'CONTINUE' button and a small yellow icon of a person.

MyRepChat

MyRepChat Number Setup

BEGIN SIGNING HELP

PowerForm Signer Information

Please complete the enclosed form to facilitate the Hosted SMS Process.

Please enter your name and email to begin the signing process.

Signer

Your Name: *

Full Name

Your Email: *

Email Address

BEGIN SIGNING

Support Logout

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CONTINUE

Review the DocuSign and click continue.

The screenshot shows the 'MyRepChat Number Setup' page at the 'Please Review & Act on These Documents' step. The sidebar is the same as in the previous screenshot. The main content area has a blue header with a back arrow, the MyRepChat logo, and 'BEGIN SIGNING' and 'HELP' buttons. The central white box is titled 'Please Review & Act on These Documents' and shows a document preview for 'ionlake support'. Below the preview is a 'View More' link. A blue bar contains the text 'Please review the documents below.' and three buttons: 'CONTINUE' (highlighted in yellow), 'FINISH LATER', and 'OTHER ACTIONS'. Below this bar are three sections of information to be reviewed: 1. First Name, Last Name, and Business Name (with input fields); 2. Service Address (with input fields for Street, City, State, and Zip Code); 3. List all the Telephone Number(s) which you authorize to Host SMS features through ionlake, LLC. (with input fields for Phone Number and Service Provider). At the bottom of the page, there is a 'CONTINUE' button and a small yellow icon of a person.

MyRepChat

MyRepChat Number Setup

BEGIN SIGNING HELP

Please Review & Act on These Documents

ionlake support
ionlake

View More

Please review the documents below.

CONTINUE FINISH LATER OTHER ACTIONS

First Name **Last Name**

Business Name (if the service is in your company's name)

2. Service Address on file with your current carrier:

Address

Street

City State Zip Code

City State/Province Zip/Postal Code

3. List all the Telephone Number(s) which you authorize to Host SMS features through ionlake, LLC.

Phone Number* **Service Provider**

() Text Enabling Phone Number Voice Provider of Phone Number

()

()

Support Logout

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CONTINUE

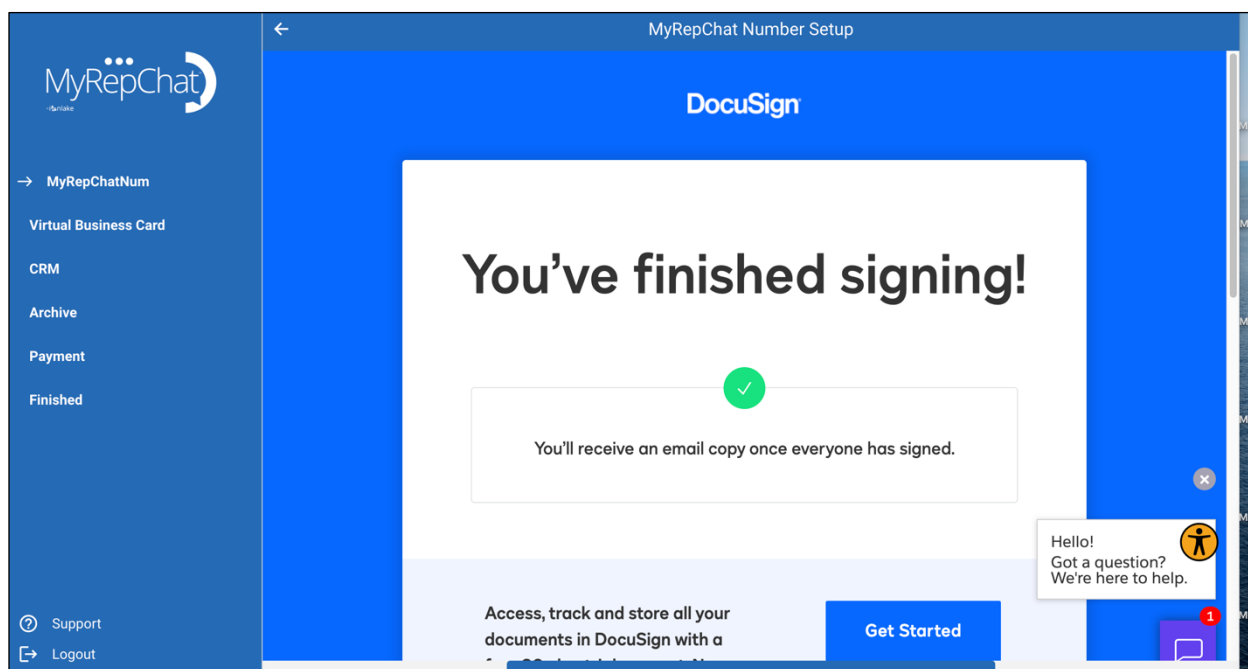
Sign the docusign to complete and Click Finish.

The screenshot shows the 'MyRepChat Number Setup' DocuSign form. The left sidebar contains the MyRepChat logo and navigation links: MyRepChatNum, Virtual Business Card, CRM, Archive, Payment, and Finished. The main content area displays the document title, a 'Done! Select Finish to send the completed document.' message, and a table for listing phone numbers. Below the table is a signature block with the text: 'By signing the below, I verify that I am, or represent (for a business), the above-named service customer, authorized to change the SMS carrier(s) for the telephone number(s) listed, and am at least 18 years of age. The name and address I have provided is the name and address on record with my local telephone company for each telephone number listed. I authorize ionlake, LLC., or its designated agent to act on my behalf and notify my current carrier(s) to change my SMS carrier(s) for the listed number(s) and service(s), to obtain any information ionlake, LLC. deems necessary to make the carrier change(s), including, for example, an inventory of telephone lines, carrier or customer identifying information, billing addresses, and my credit history.' The signature block includes a signature line with 'Stacey Irene Witty', a 'Print' button, and a 'Date' field with '1/4/2023'. A 'Required - Signature Applied' stamp is visible. At the bottom, there is a 'FINISH' button and a 'Letter_of_Authorization.pdf' label.

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

This screenshot shows the same DocuSign form as above, but with a 'Save a Copy of Your Document' dialog box open. The dialog box contains the text: 'Your document has been signed' and 'If you would like a copy for your records, select Download or Print and save.' Below this text are three buttons: 'DOWNLOAD', 'PRINT', and 'CLOSE'. The background form is dimmed, showing the same signature and date information.

DocuSign is complete – the form is sent to Support at MyRepChat for processing.



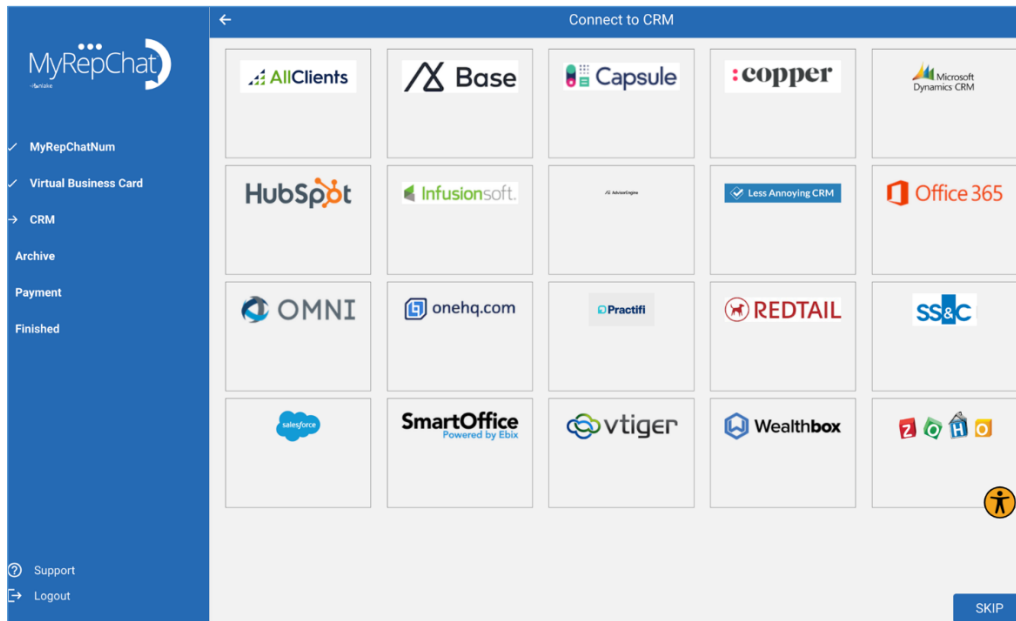
Setup your Virtual Business Card

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.

A screenshot of the 'Virtual Business Card Information' form within the MyRepChat application. The form is set against a light gray background. On the left is a blue sidebar with the MyRepChat logo and navigation links: 'MyRepChatNum' (checked), 'Virtual Business Card' (selected), 'CRM', 'Archive', 'Payment', and 'Finished'. At the bottom of the sidebar are 'Support' and 'Logout' links. The form fields are as follows: 'Photo' with a camera icon; 'Name' with the text 'Stacey Witty'; 'Email' with 'totoc85653@maazios.com'; 'Title' with 'ionlake'; 'Company' with 'ionlake'; 'Address' with '1234 golf lane'; 'City' with 'Golf city'; 'State' with 'MN'; 'Zip' with '99880'; 'Phone' with '9526078444'; and a 'Note' field with the text '+19525223503'. A blue 'SAVE' button is located at the bottom right of the form.

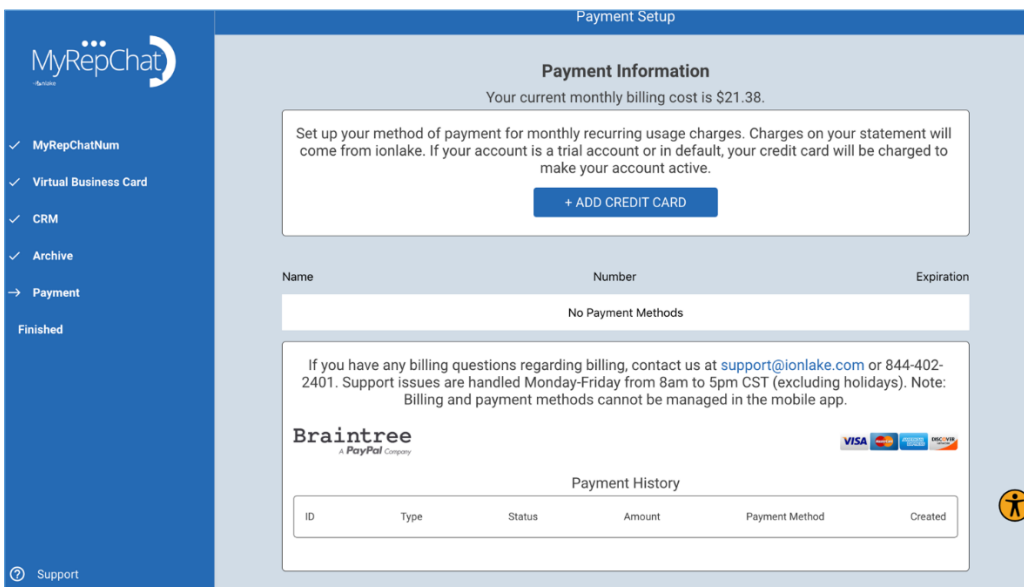
Integrate with your CRM. If you connect your CRM uploading contacts is simple. This step allows you the opportunity to connect your CRM to MyRepChat.



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.




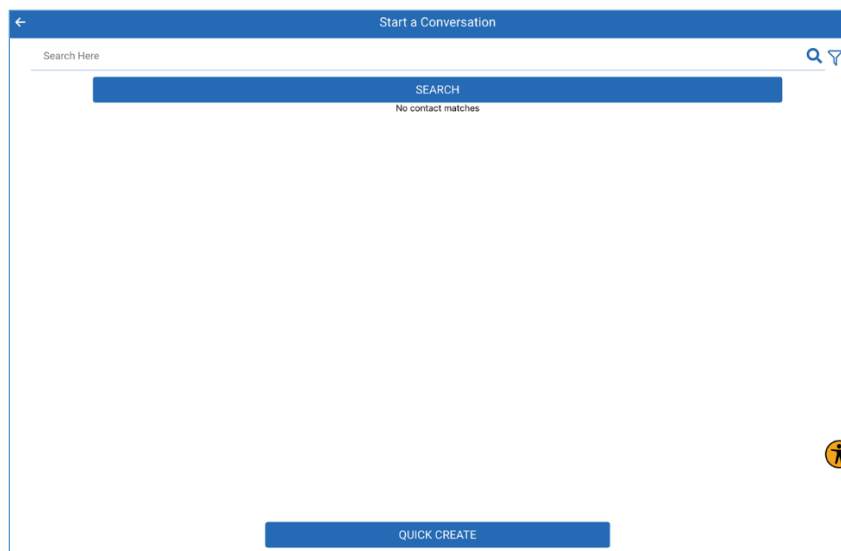
Once you have completed your account setup, your account will be sent to Cetera Advertising Review to approve and activate.

How to Send a Message

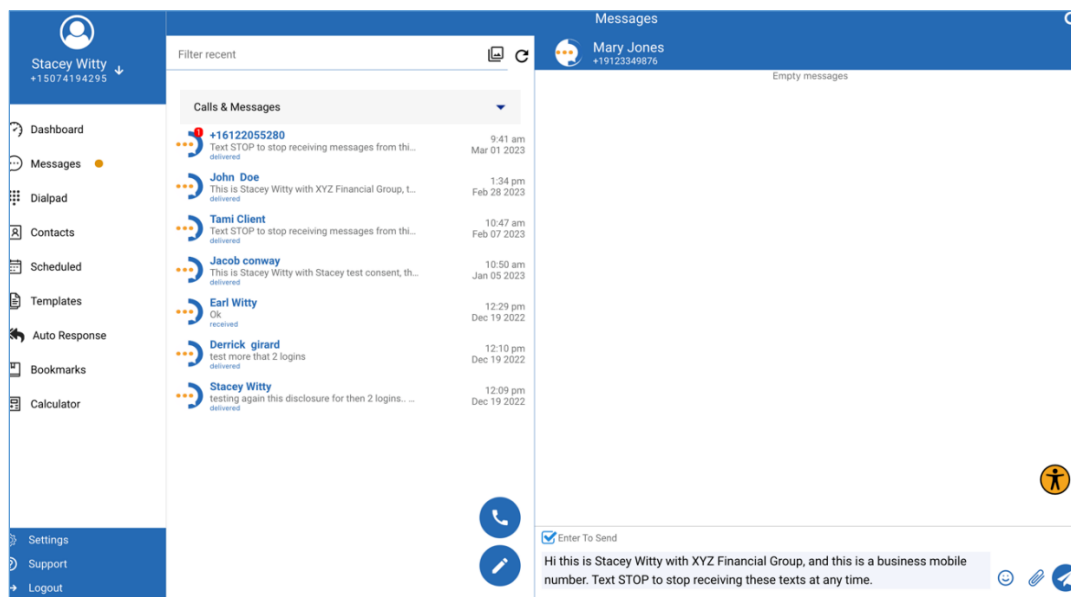
From the Message Tab, you can view and create messages. NOTE: Client needs to be sent the consent before text messages can be sent or scheduled.

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.

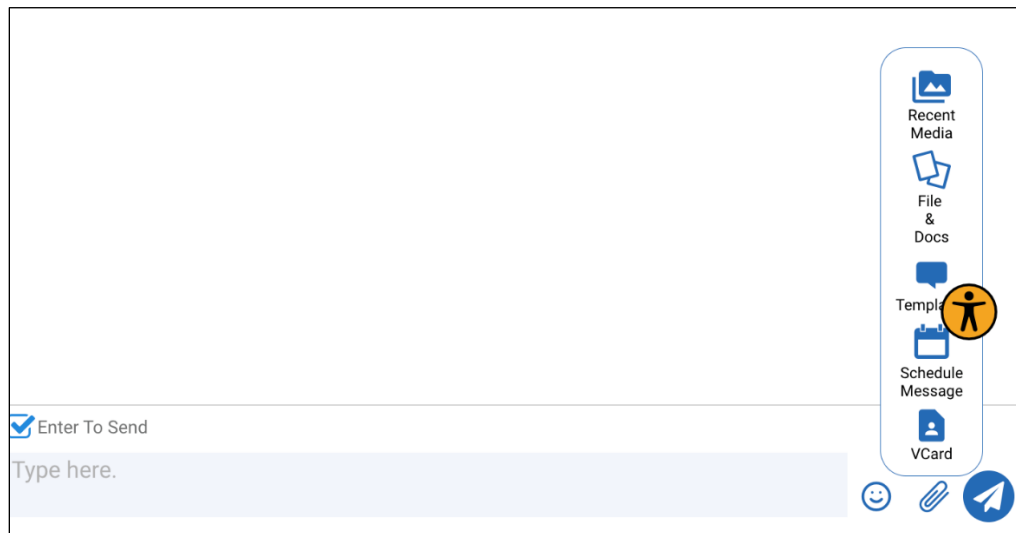
- To send a message click on the messages tab, then select an existing chat, or select the 
- To start a conversation either enter the name of your client and pull in First Name, Last Name and Mobile number from the CRM or click Quick Create to create a new contact.



Send the consent by clicking the paper airplane, then you can then text the client.



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.

A screenshot of the 'Scheduled Message' form in a mobile app. The form has a blue header with a back arrow and the title 'Scheduled Message'. Below the header, there are several fields: 'To' (with a person icon), 'Date' (with the value '03/05/2023' and a calendar icon), 'Time' (with the value '8:25 pm' and a clock icon), 'Frequency' (with the value 'Just once' and a dropdown arrow), and 'Message' (with the placeholder 'Type Something'). Below the 'Message' field is a link 'Select Template'. At the bottom, there are two blue buttons: 'SAVE' and 'DELETE'.

Templates

Message Templates are a 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.

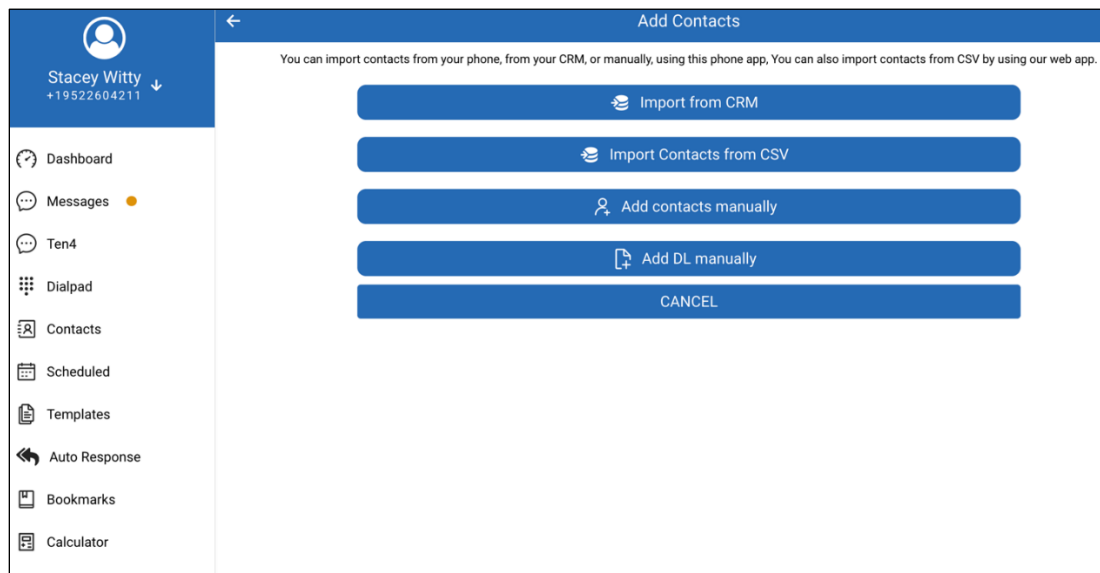
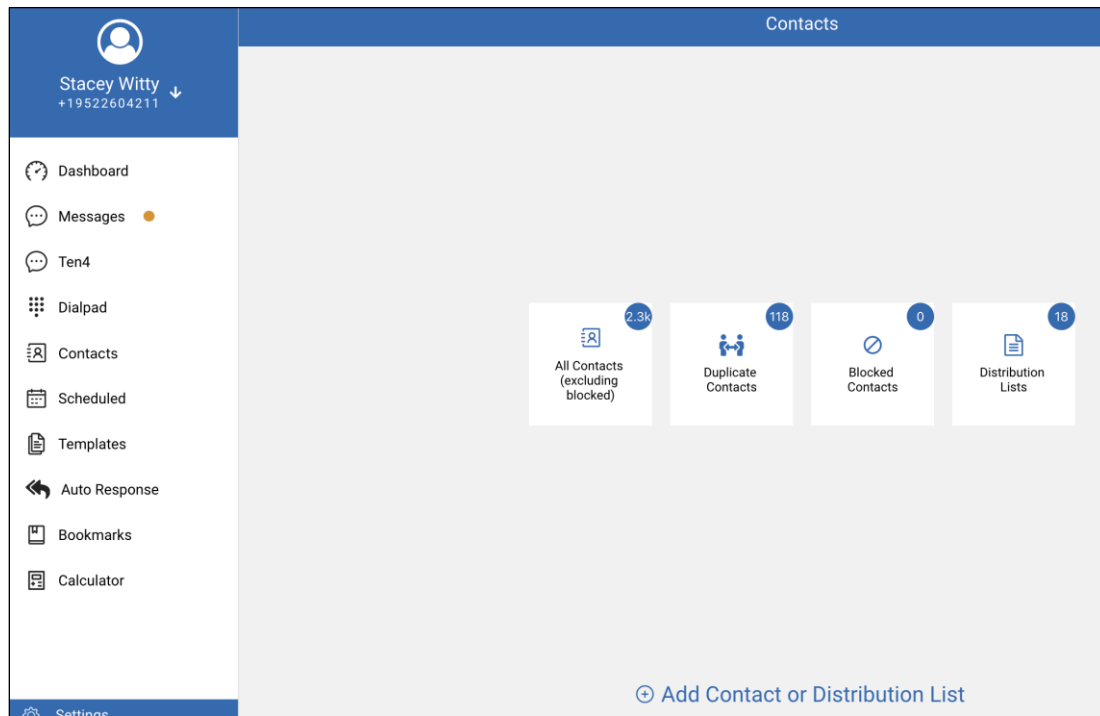
Create auto response – enter the key word and the auto response message.

The screenshot shows a mobile application interface for configuring an auto response. At the top is a blue header bar with a back arrow on the left and the title "Auto Response" in the center. Below the header, the form is organized into sections. The "When An" section has a dropdown menu currently set to "Incoming SMS". The "Equals" section has a text input field containing the word "Yes". The "Then.." section has a dropdown menu currently set to "Reply with". Below these sections is a "Message*" section with a text input field containing the text "Looking forward to seeing you.". At the bottom left of the form is a "Disabled" toggle switch, which is currently turned off (grey). At the bottom center are two large blue buttons: "SAVE" and "CANCEL".

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®.