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Signup Process

Signing up for MyRepChat occurs in 3 Phases.

Phase 1: Signup Phase 2: Sign In Phase 3: Setup

You can signup to our general account on our website, see link below, or you may have been provided a unique URL from your firm. Both processes work the same.

https://dart.ionlake.com/dart/web/Login.html?theme=myrepchat

Note: If you have unique link from your firm that will roll you under your firms pricing and policies. If you sign-up on our website, you will be set to a standardized price and policies.

Phase 1:

1. If you signup using the general URL, you will be provided the opportunity to input a Group Code, should you be affiliated with a broader organization. If you have a Group Code, insert it here, if not, you can simply select Continue. The process after this is the same.

Note, if you use the unique URL provided by a group, you will not see this step



MyRepChat Account Signup

Are you a member of a group that uses MyRepChat?

- If yes, enter your group code here
 (No code? Ask your group administrator OR <u>ask us</u>)
 If no just click continue
- If no, just click continue

 Group Code



VCard

Create a virtual business card that you can send to your clients to get your contact info into their phones

Already created an account? LOGIN TO COMPLETE YOUR SETUP

2. The second step requires some basic information about the individual establishing an account. This information will also be used to pre-populate your vCard later in the process.



MyRepChat Account Signup

Tell us about you (*=required fields)

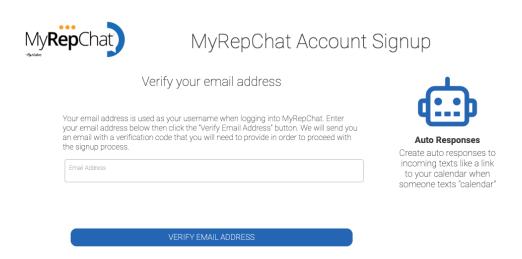




CRM Integration

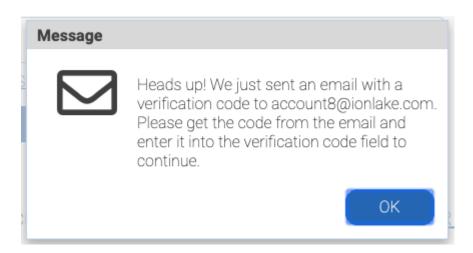
Connect with your CRM to get your contacts into MyRepChat, and create notes for your sms messages

- 3. This step is extremely important for a couple of reasons:
 - a We need to verify your email address
 - b Your email address will become your Username once the set-up process is complete
 - This is the only chance you will have to change your email address (username) without having to contact MyRepChat Support



Already created an account? LOGIN TO COMPLETE YOUR SETUP

4. You will notice an alert instructing you to check your email



5. Once you have retrieved the email and the code within, insert the Verification Code.

IMPORTANT: The verified email will be your username when logging in to MyRepChat.

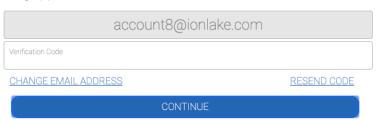
Note that you can have the code resent if you did not receive it and you can also change the email address



MyRepChat Account Signup

Verify your email address

Your email address is used as your username when logging into MyRepChat. Enter your email address below then click the "Verify Email Address" button. We will send you an email with a verification code that you will need to provide in order to proceed with the signup process.





VCar

Create a virtual business card that you can send to your clients to get your contact info into their phones

Already created an account? LOGIN TO COMPLETE YOUR SETUP

6. The next step is to create your password to use when logging in to MyRepChat via the mobile app or the desktop.



MyRepChat Account Signup

Set your password

Security is really important. For MyRepChat you will need to create a password that is at least 8 characters long, contains at least one uppercase letter, one lowercase letter, and one number.

Password	
Password Strength:	
Verify Password	
	CONTINUE



Templates

Create templates for messages that you send on a regular basis

7. The next step is to verify your mobile phone number. This is a verification step necessary to ensure only real people are creating account.



MyRepChat Account Signup

Verify your mobile phone

We need to verify that we can send a text message to your mobile phone. Enter in your mobile phone number below and click the "Send Code" button.

(Numbers Only)			
Area Code			



CRM Integration

Connect with your CRM to get your contacts into MyRepChat, and create notes for your sms messages

SEND CODE

Already created an account? LOGIN TO COMPLETE YOUR SETUP

8. The final step in the initial set up phase of your MyRepChat account is to review and accept the terms of use.



MyRepChat Account Signup

Create your MyRepChat account

One last thing! In order to create a MyRepChat account you must accept our terms of use.

✓ Click Here to view terms of use



Voice Calling

With the voice add-on you can call your clients using the MyRepChat phone number

ACCEPT TERMS OF USE AND CREATE ACCOUNT

FINISH

9. Once you have accepted the terms of use, you can finish the 1st Phase of the signup process.



MyRepChat Account Signup

Create your MyRepChat account



We are busy creating your account, this can take up to a minute to complete, so please be patient.



CRM Integration

Connect with your CRM to get your contacts into MyRepChat, and create notes for your sms messages

FINISH

Already created an account? LOGIN TO COMPLETE YOUR SETUP

10. Congratulations, your account has been created. Please review the information on the screen to help guide you as you complete the rest of the signup process.



MyRepChat Account Signup

Create your MyRepChat account

Congratulations! You now have a MyRepChat account. Your new account is ready for you to log in. You should have received an email with login instructions. After you have logged in you will be guided through:

Setting up a MyRepChat phone number Creating your VCard Connecting your CRM

Let us know if you have any questions by emailing our support team at support@ionlake.com.



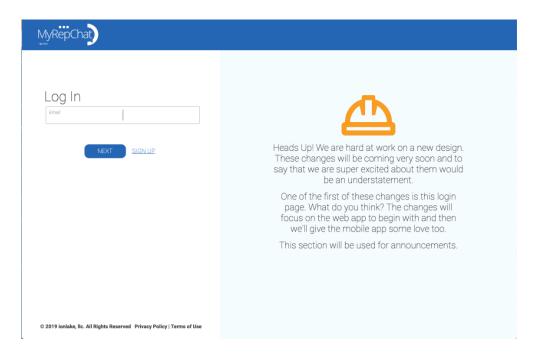
Auto Responses

Create auto responses to incoming texts like a link to your calendar when someone texts "calendar"

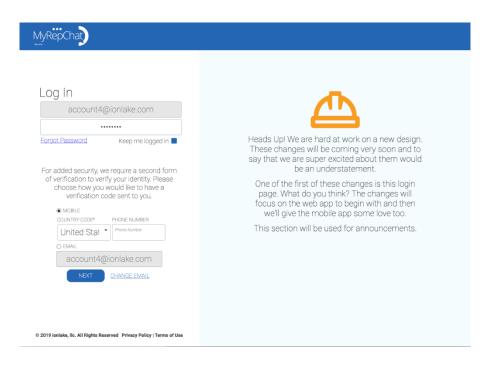
FINISH

Phase 2:

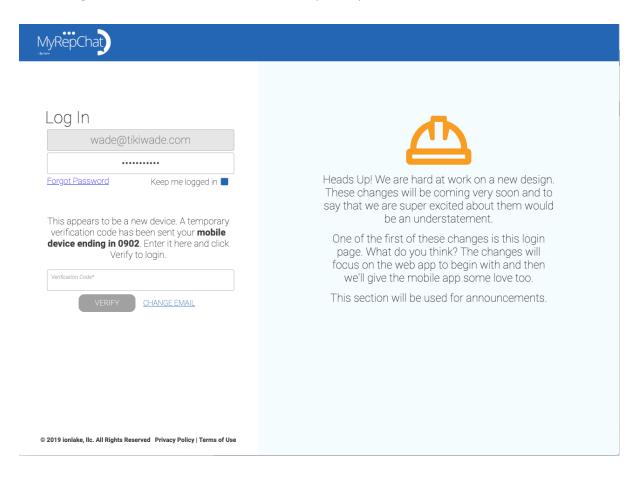
1. Now that your account has been completed, to continue the process you will need to log in using the username (email) and password you created during the Signup process.



2. Upon logging in for the first time you will be prompted to set up Multi Factor Authentication.



3. Moving forward, should Authentication be required, you will see a screen similar to this:

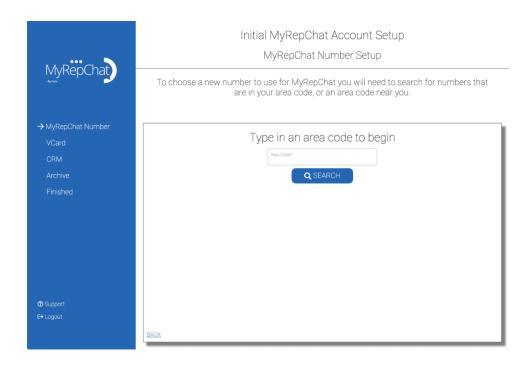


Phase 3:

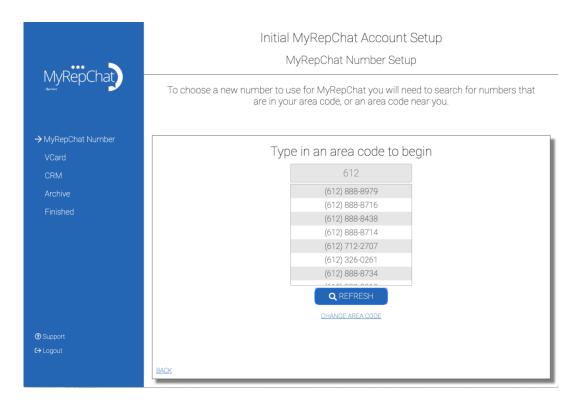
1. Upon logging in for the first time, you will be prompted to compete the final Set Up phase of MyRepChat. The first decision to make is whether you want to choose a new number for texting within MyRepChat or if you would like to SMS enable a landline.



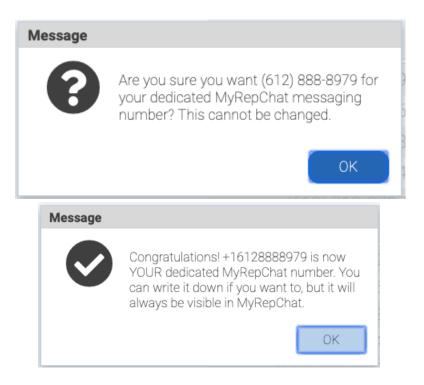
2. If Choose a New Number is selected, you will be guided to the following page to input your desired area code:



3. Upon entering an area code, you will be presented with 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.



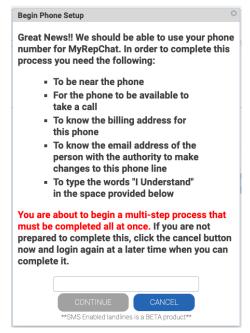
4. When a number is selected, you will be asked to confirm your selection:



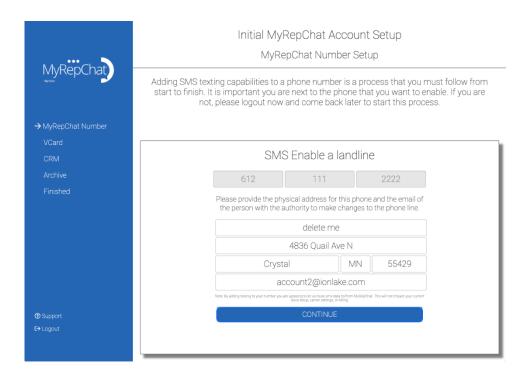
5. If you choose to SMS enable your landline number, you will be guided to the following page to complete the process:



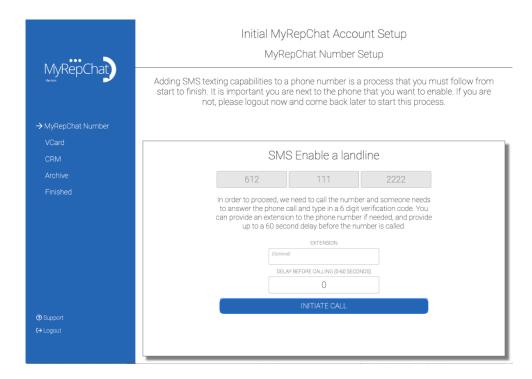
6. After entering a number and selecting the Verify Phone Number button, you will see a dialogue like this if the number you entered is a landline and we can SMS enable the number. If you do not get this dialogue box, please read the alert in full to know what, if anything, can and needs to be done in order for us to SMS enable the number entered.



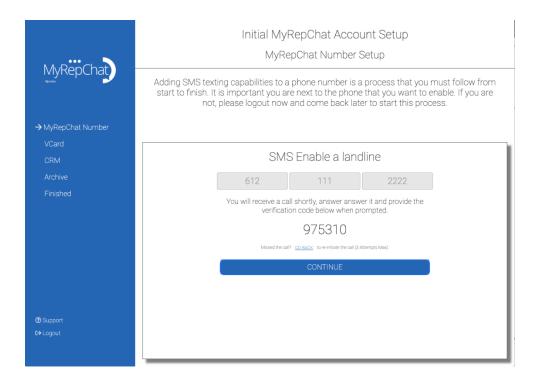
7. We must first know the business information for the phone number that you wish to SMS enable.



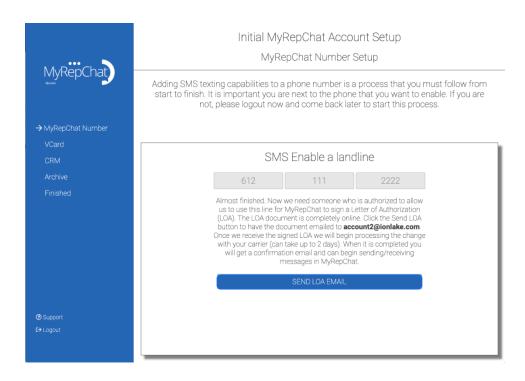
8. The next step requires us to place a call to the number you with to SMS enable so we can verify that it can receive phone calls and that you are in position to act on behalf of the number.



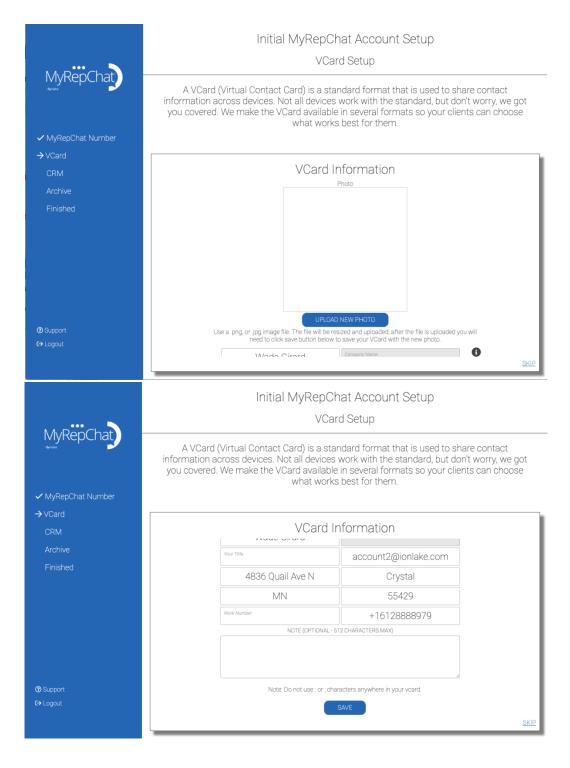
9. After answering the phone and when prompted, please type the number displayed on the computer in to the landline phone to complete the verification process.



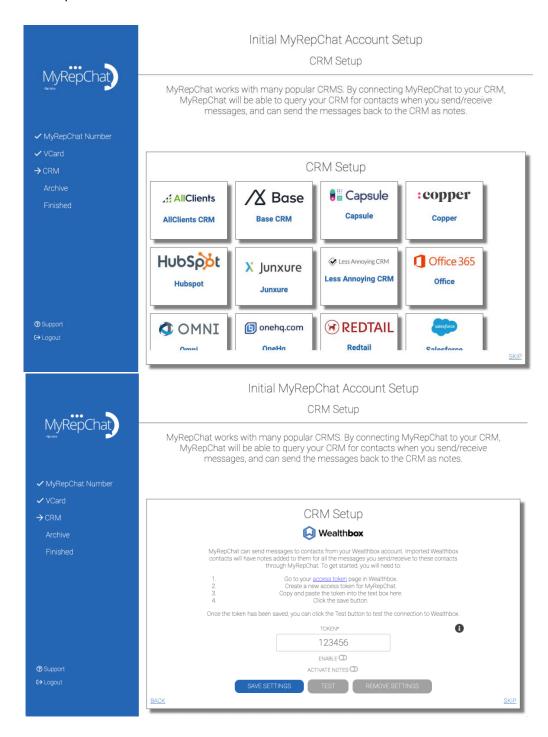
10. The final step in this process involves ionlake sending an electronic LOA that **must be signed** before we can complete the process.

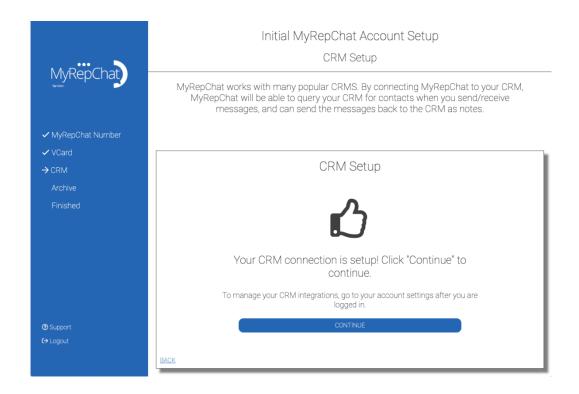


11. The next step is setting up your Virtual Business Card (vCard). The information in your vCard will come from the information you added in the Signup Phase. You can add a photo and edit this information here as well as in your account settings when logged in to your account at a later point.

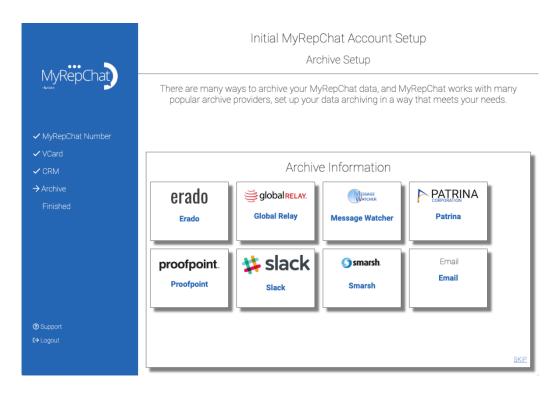


12. Adding contacts is essential to MyRepChat and our CRM integrations make this very simple. This step allows you the opportunity to connect your CRM to the MyRepChat. You can set your CRM here or by selecting SKIP in the bottom right you will be provided instructions on how to set this up at a later point in time.

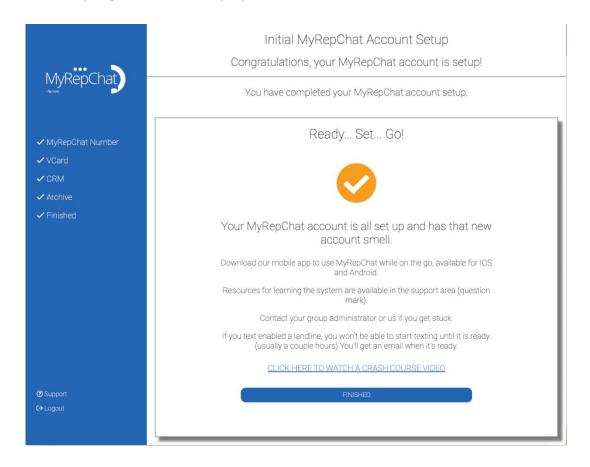




13. If you have an existing relationship with an archiving firm, you can make the connection between MyRepChat and your archiver here. If you do not have an archiver, you can also choose to have ionlake archive your messages. You can also skip this step and complete later.



14. You are ready to get started with MyRepChat.



^{**}If you are part of a group, you may not be able to log in to MyRepChat until your administrator has approved your account**

MyRepChat® FAQs

1. Can I change my email address after my account is set up?

Yes; however, you will need to contact support@ionlake.com to do so once the account has been created. The best practice is do ensure you use the correct email address upon account creation.

2. Can I change my password after my account is set up?

Yes, this can be done within your account settings.

3. Why do I need to verify my personal mobile phone number?

This is important in the verification process. We need to ensure you are creating the account and that you are in fact a human being intentionally creating an account. We do not force you to use this number for anything once the account is created.

4. I have sent the email verification a few times and I have not received the email.

Some spam filters will reject our verification email resulting in your inability to move forward in the process. If this happens, you can either use a different email address that can receive the email so the progress continues and contact us after the account is created to change the email or you can contact us prior to creating the account and we can help with the verification process.

5. If I create my account without using the group code, can this be fixed later in the process?

Yes, this can be corrected; however, your organization may have specific policies in place that need to be followed. Going around these policies, even if by accident, may result in potential ramifications with your group. Best practice is to verify if you have a code and signup under the right group from the beginning.

6. Can more than one person use the same email address?

No, your email address is how we identify you as a user for MyRepChat.

7. Can the office details (address) be the same for more than one person?

Yes, this information can be used for more than one person.

8. How does the service work?

Users will be asked to download an app on their mobile device. Once the app is installed, the user will be provided with a new separate business phone number that can be used for both texting and phone calls. Users will also receive access to an online portal allowing them to send and receive text messages from their computer.

9. How can I access the service from my computer?

Once your account has been activated, the online portal can be accessed by going to the website https://dart.ionlake.com/web/Login.html. It is recommended you bookmark this page.

10. Does MyRepChat® have a Mobile App?

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

11. Do I need a separate device to use the texting service?

No, the app can be downloaded on your existing device. The app acts like a phone within a phone making it simple to keep your personal communications separate from business.

12. How will my clients know my new business phone number?

We recommend you reach out to your clients sharing your new number and explain that you are now able to communicate via text message for business purposes. You should also explain that nothing sensitive should be communicated via text messaging. You can also have them text the word "VCARD" to you and it will automatically transmit your contact information to them.

13. How am I going to know if an incoming call or text message is personal or business?

- If a user chooses to SMS enable a landline number, all incoming calls will go to the landline. If a
 new number is created, then by default all incoming calls will be forwarded to the voice number
 located within the Basic Tab of Account Settings.
- If Voice Features are turned on in the Add Ons Tab of Account Settings, then all inbound calls will run through the cell phone of the user. The user will receive an inbound call and it will show their own MyRepChat Number. Upon answering the call, they will be notified of the person calling and provided the chance to answer the call, "Press 1", or send the call to voicemail, "Press 2".
- **14.** Will I be able to import my existing contacts in my cellphone to the new app? Yes, if you allow the app to access your mobile phone's contacts; however, this is not dynamic connection similar to your CRM integration.
- **15.** How long does it take to get MyRepChat® account approved? Accounts are created instantly; however, if your firm prefers a pre-review before the account goes live it could take longer before you can begin texting with a client.

16. What is a vCard?

A vCard is a virtual business card. You can text the "vCard" to your client and they will receive your MyRepChat® information and they can then add you as their contact.

15. Will I be able to text more than one client at a time?

Yes, please keep in mind that all messages are sent 1 to 1. This means that even if you send a message to 10 people, our system will send an individual message to each recipient.

16. Do I need to accept the app's request to access my phone's contacts, microphone and notifications?

If you would like for your contacts to be automatically imported into the program, you will need to allow access. The voice function within the app requires access to your device's microphone. Notifications must also be enabled to alert you of an incoming text or phone call.

17. When using the app to make phone calls, does it count against my cellphone's minutes?

The app will attempt to first use a Wi-Fi connection for the call. If Wi-Fi is not available, and your cellular network is used for the call, then the minutes used will count toward your plan.

18. How can I change/reset my password?

Forgotten Password

You will need to request a password reset from the main log in page in the app.

Changing Password

You can change your password in the Settings page located in the upper right-hand corner near the gear icon.