

Getting Started with your MyRepChat Account



You got your account set up! Now what do you do? Here are some practical tips for getting started with MyRepChat and building your compliant business texting skills.

- Need a refresher of the platform? [Recorded platform demo](#)
- [How to change password?](#) - Settings, Profile, Change Password
- Do you want to add more logins on your account? [Managing Account Logins](#)
- [Can I use Biometrics with MyRepChat?](#)



How do I send my first text?

Depending on your firm, the home office may need to complete their review of your account and approve your account before you can send any texts. When your account shows Active status then you can text.

Before you start texting with clients we recommend texting with yourself and other office staff to get the feel for the platform and to see what your clients will experience.

Add yourself as a contact

Mobile: From Recent hit the back arrow in the upper left for the blue menu screen. Push Contacts, Add Contact or DL, Add Contact Manually. Enter your First and Last Name. Add Phone for your mobile number. Press Save.

Computer Browser: From the Dashboard, click Contacts on the blue menu. Click Add Contact or Distribution List, click Create a New Contact. Enter your First and Last Name. Add Phone Number and be sure to toggle Use For Messaging to green.

Note: If you integrated a CRM, your Contacts do not automatically "show up" in MyRepChat. As you text new people or Distribution Lists, MyRepChat will create a Contact(s) for that person in real time. It's OK if your Contacts count in MyRepChat does not match your CRM Contact count.

Send yourself a text

Mobile: Open the app, click the pencil icon in the bottom right, search for yourself. Click into your Contact, then type and send your message at the bottom.

Computer Browser: Log into your account. From your Dashboard, click Messages on the left in blue, click Compose Message near the bottom in white, search for yourself. Select your name, then type and send your message at the bottom.

Note: Some firms have Positive Consent enabled. If so, the first action you will take is to send the Positive Consent message to the Contact. Once they Accept, then you can openly text.

[Understanding Positive Consent](#)


[Positive Consent sent to your Personal Number](#)



Try some of the other features available when sending messages

Besides basic text messages there are other texting features available.

Icons on the computer browser



Send multimedia
Click that then select documents or images to text per your firm's compliance policies.

Schedule a message
Once you've created your message you can schedule for a date/time and frequency such as just once or every quarter.

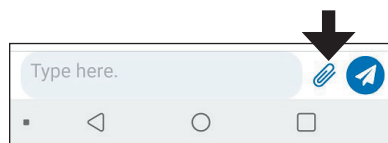
vCard
The vCard is your electronic business card. You can send out your vCard to get your business contact information into your client's phone.

Apply a template
You can create templates of frequently used messages on the blue menu, then use this icon to apply a template into a message. Examples – [Template Starting Points](#)

Emoticons
Everybody loves an emoticon!

Make phone call
This icon will only appear if you have enabled the optional voice feature. If so, click the icon to initiate a call on your forwarding number.

Icons on the MyRepChat phone app – Press paperclip for options



Reach out to a handful of clients who you know want to text

Now that you've got the basics down reach out to several clients who want to text. Tell them you've added the ability to text and meet the regulatory requirements that apply in financial services.

- Send them a welcome text and tell them to save your vCard as your business contact in their phone. Remind them that all business texting needs to happen there and not on your personal cell number.
- Send them your vCard.

After a period of texting with a handful of clients and you are feeling good about your MyRepChat skills, it's time to look at introducing MyRepChat to your client base.

