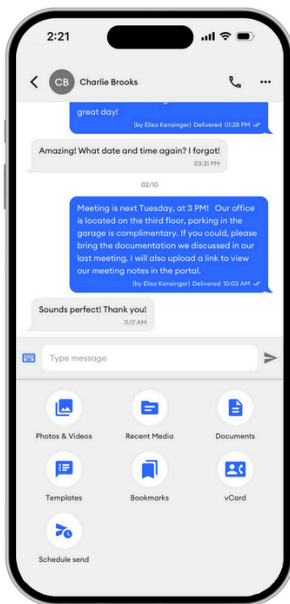


Setting Up Your MyRepChat Account



Setting up your MyRepChat account can take 10-15 minutes. There are several multi-factor authentications (MFA) steps so be prepared to get/give codes from texts and in some cases phone calls. If you are opening an account on behalf of someone else, be sure they are accessible for the MFA codes.



You can't use an existing mobile number

Why can't I use my personal cell number?

If you planned to use a mobile number, please do not start an account before reviewing the Number Selection options below.

Firms/groups have a specific group code or account link that can be used during registration. You'll want to get that before you sign-up from your home office or call our Support at 844-402-2401.

Account Link

You can **ONLY** open an account on a computer browser, not a phone browser. (*Google Chrome highly recommended*)

Group Code

You can either open an account on a computer browser (*Google Chrome highly recommended*) **OR** the MyRepChat app after downloading from your phone store.

Create a new account

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.

Organization Code

NEXT

[Skip for now](#)

Don't have a code?

Please contact us so that we can assist you with setting up your account.

ASK US



Detailed Steps to Open a MyRepChat Account

You will be guided onscreen through the account opening steps.

Check out our [Basic Setup portal](#) for FAQ and support

1 Account information:

Your basic contact information. Name, address, email, phone.

- This will create your account and your account database. The database can take up to a few minutes to create so you may need to wait to log into your account.
- You will receive two emails from noreply@ionlake.com. One stating that your account is being created and where to log into your account. The second with your password. Sometimes they end up in Spam/Junk so check there if you don't see it within 5 minutes.

The screenshot shows the 'MyRepChat An FMG Company' logo at the top. Below it, the form is titled 'Your Name'. It contains four input fields: 'Enter Your Name', 'Email', 'Enter Password', and 'Confirm Password'. A blue 'FINISH' button is at the bottom, with a small link 'I have an account. Login Here' below it.

The screenshot shows the 'MyRepChat An FMG Company' logo at the top. Below it, the form is titled 'Company Name*'. It contains five input fields: 'Address*', 'Address 2', 'City*', 'State/Region*', and 'Post Code*'. A blue 'NEXT' button is at the bottom.

2 Number Selection

You can either text enable a landline number or select a local area code number from our inventory. [Watch here](#) about selecting the right phone number for MyRepChat. Follow the onscreen instructions.



You'll see the two options once you sign into your account, with more information on how to select and get started.

The screenshot shows the 'MyRepChat Number Setup' screen. At the top, it says: '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 options:

- 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

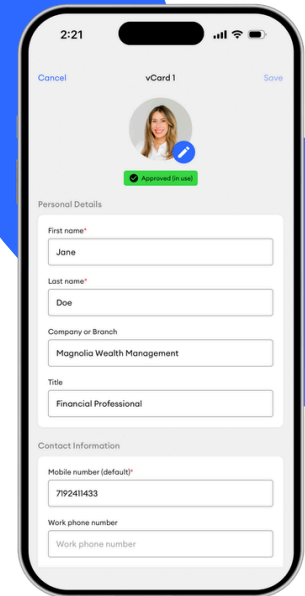
What Is Hosted SMS

GET STARTED

3

Virtual Business Card

This is your digital business card. You can easily send your business contact information for clients to add as a contact in their phone and identify your texts.



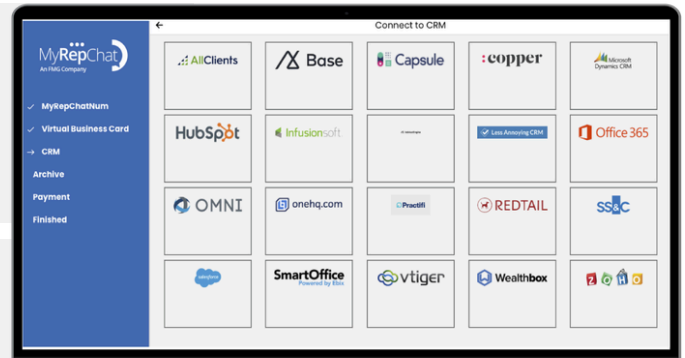
4

CRM Integration

This is the most highly regarded feature by users outside of the compliant texting itself. We offer about 20 different CRM integrations including the top CRMs used by financial advisors. There are two benefits of integrating your CRM.

Pull contacts dynamically into MyRepChat from the CRM as you text new people. Note: Your Contacts count in MyRepChat will start at zero. MyRepChat does not sync all contacts in your CRM. As you text new people the MyRepChat Contact count will grow.

The ability to automatically write notes of the texts into the CRM under the contact.



5

Connect to Archiver

This is what makes your business texting compliant and allows you to use MyRepChat texting as a true business communication tool. We offer about 15 different archiving options.

Many firms/groups have already set up the archiving process at the firm level. If so, that will be noted and you will bypass this section.



6

Billing

Depending on your firm and their payment arrangement, you will be prompted to enter your payment information for your monthly subscription to MyRepChat.



Payment Setup

Payment information
Your current monthly billing cost is \$20.

Set up your method of payment for monthly recurring usage charges. Charges on your statement will come from Ionlake. If your account is a trial account or in default, your credit card will be charged to make your account active.

+ ADD CREDIT CARD

Name	Number	Expiration
No Payment Methods		

If you have any billing questions regarding billing, contact us at support@ionlake.com or 844-402-2401. Support issues are handled Monday-Friday from 8am to 5pm CST (excluding holidays). Note: Billing and payment methods cannot be managed in the mobile app.

Braintree
A PayPal Company

Payment History

ID	Type	Status	Amount	Payment Method	Created
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DONE

