

# Getting Started with MyRepChat

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Tips for getting started and building your  
compliant business texting skills

# Now that your account is set up, it's time to get started!

Here are some practical tips for getting started with MyRepChat and building your compliant business texting skills.

## 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.

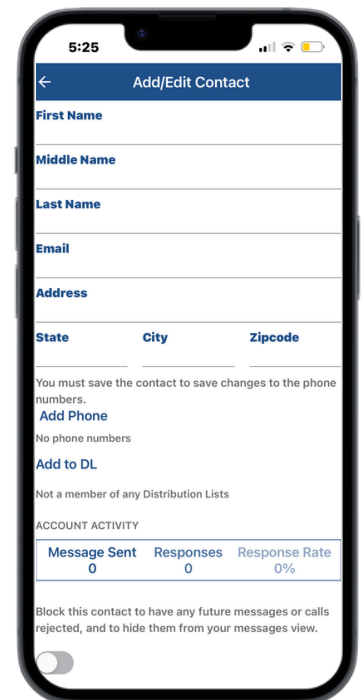
Before you start texting with clients we recommend texting with yourself and other office staff to get the feel for the platform and to see what your clients will experience.

### 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.

**Desktop:** 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.

**Desktop:** 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.

This is from Jackie Lucente from Magnolia Wealth.  
By replying with the word 'ACCEPT' you are agreeing to the terms of use. Available at this link:  
[www.magnoliawealth.com/terms-of-use](http://www.magnoliawealth.com/terms-of-use). Reply with the word 'ACCEPT' to continue.  
(sent by Jackie Lucente) Delivered 2:04 pm

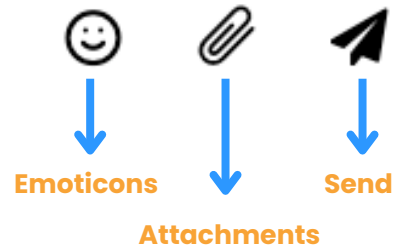
Accept  
message-received 2:04 pm



**Example of Positive Consent messaging**

## Try some of the other features available when sending messages

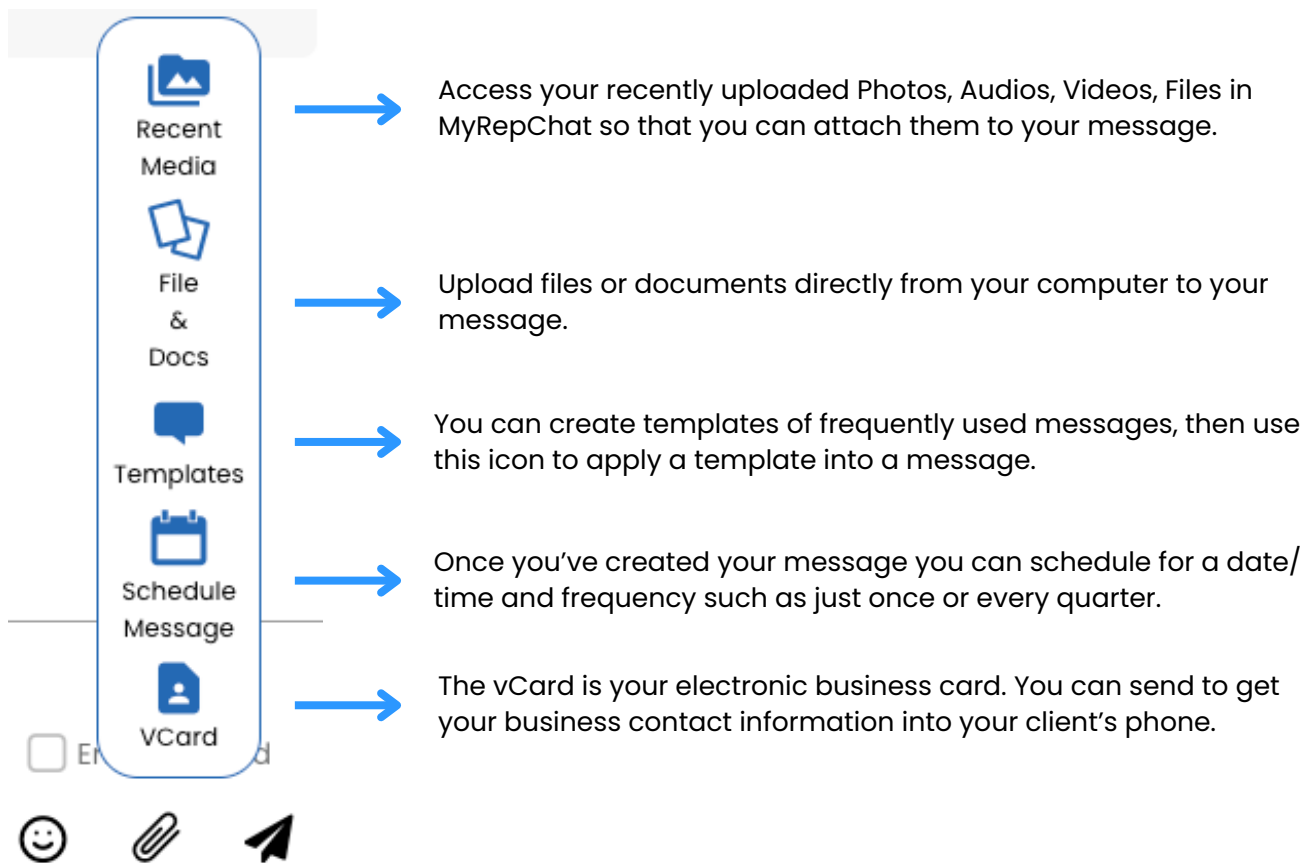
Aside from basic text messages, there are other texting features available. When sending a message, you'll see three icons within the message window:



## There are several options when selecting the attachment icon

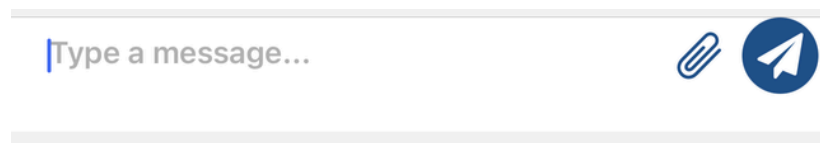
Learn what each of them does below:

### Desktop:

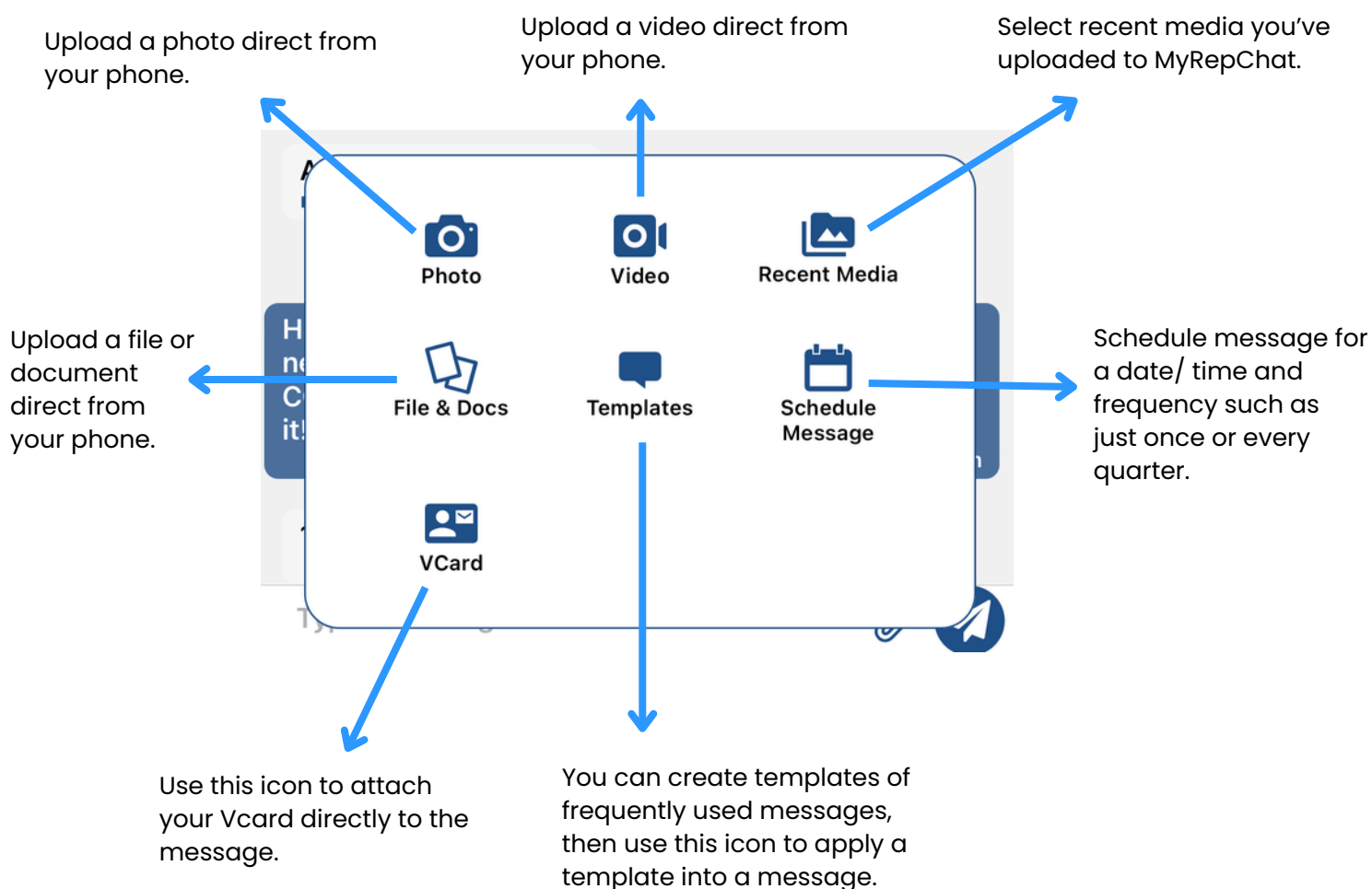


## Mobile

There are two icons to select within the mobile messaging box:



When selecting the attachment icon, the following shows up:



## 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 Virtual Business Card 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 Virtual Business Card.

**Questions? Reach out to [support@myrepchat.com](mailto:support@myrepchat.com) or visit our website for more help & FAQ: <https://myrepchat.com/support/#get-support>**