

# 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 a 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 account link or group code for opening the account. Get that **BEFORE** you start 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.

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## Detailed steps to open an account (**Account Creation Guide**)

You will be guided onscreen through the account opening steps.

- 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.
    - [How do I log in for the first time on a computer browser](#)
    - [How do I log in for the first time on the mobile app](#)
    - [How do I log in for the first time with SSO](#)
    - [Can I use biometrics with the MyRepChat app?](#)
- 2 Number Selection** You can either text enable a landline number or select a local area code number from our inventory. [Selecting the right phone number for MyRepChat.](#) Follow the onscreen instruction.
- 3 Vcard** The Vcard is your electronic business card. You can easily send your business contact information for clients to add as a contact in their phone and identify your texts. [Articles on vCard setup for browser and app.](#)



- 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 synch 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.
  - [Articles on the CRM integrations with setup details and CRM specific behaviors](#)
- 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. [Article on your 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.
  - Some users may not have an existing archiving solution. We offer an archiving add-on for these situations. [Article on how set up the archiving add-on.](#)
- 6 **Billing Information** Depending on your firm and their payment arrangement, you will be prompted to enter your payment information for your monthly subscription to MyRepChat. [Article on adding your payment information.](#)

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**This completes your account setup. Next be sure to read “Getting Started with your MyRepChat account” to send your first text.**

**Note:** Many firms/groups will automatically place your account in Review status so your home office team can complete their back-office processes. You cannot text when your account is in Review status. Please reach your home office team if you have questions on their timing to complete the Review and move your account to Active status.

