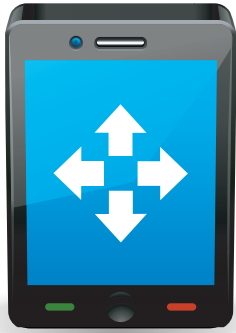


Advanced MyRepChat Features



MyRepChat is designed to be a business communication platform. It allows you to take advantage of the inherent advantages of texting like high read rates and quick responses. Business texting is an excellent complement to traditional phone and email communication to service clients and build your business.

Best practices - Best practices when texting in your business

Besides client relationship touches there are many ways that advisors use MyRepChat on a day-to-day basis. As always be sure to follow your firm's compliance requirements and guidelines.

- Meeting Confirmations – only 40% of advisors do this but once confirmed the “stick” rate is 90%. Make sure you are preparing for a meeting that actually is going to happen.
- Direct clients to see/respond to important emails like account paperwork and proposals.
- Trust building with prospects – a single text improves the conversion rate to a client.
- Courtesy account activity updates – distributions, deposits, transfers, and more.
- Event invitations and reminders.
- Requests to schedule annual or quarterly meetings.
- Market and economy updates, perspective on “headline” news.

Please find more information on advanced features/functions and other MyRepChat topics.

Business Building

- [Using MyRepChat for seminars](#)
- [How to use texting with prospects](#)

Contacts

Contacts do not automatically pre-populate in MyRepChat and that's ok. They will dynamically pull in from your integrated CRM as you text new people or Distribution Lists.

- [How to add a new Contact from a web UI](#)
- [How do I get my contacts from my CRM into MyRepChat](#)
- Not seeing notes of the texts as expected in your CRM? One possibility is that the link between the contact in MyRepChat and your CRM is broken. Use Reconcile Contact to link or relink Contacts.
[How does Reconcile Contact work?](#)
- Don't have a CRM for bringing your Contacts into MyRepChat? Here's another method using a CSV file. It's recommended to add a few first to test the process before doing a large list.
[How do I upload a CSV file with my Contacts?](#)



Positive Consent

Some firms have Positive Consent enabled for their advisors. Positive Consent requires that advisors get their clients to grant consent to be texted with the keyword "accept".

- [What is Positive Consent](#)
- [How to send Positive Consent to a Distribution List](#)

Templates and Auto Responses

- [Template Starting Points](#)
- [How to create auto response templates](#)
- [Placeholders for Templates and Auto Response](#)

Calling with MyRepChat

- [Using MyRepChat as a fully function 2nd number](#)
- [Introducing the MyRepChat dial pad](#)
- [Outbound Calling Options with Hosted SMS](#)

Various Topics

- [How do I send my vCard?](#) - Be sure to get your contact information into your client's phone
- [How to receive an email for any inbound texts](#) - An effective way to get notified of inbound text activity
- [Changing Your Telephone Provider with Hosted SMS](#) - What happens if I change my phone provider when you are hosting my texting?

