G.A. REPPLE Docupace

When an advisor joins G.A. Repple & Company they will be introduced to our business workflow platform. All client requests and new business either with our custodial third-party (NFS) or direct business need to be submitted through here.

Step 1:

Provide the username and password for Docupace & DocuSign – these work in tandem.

Step 1a:

Ask if the user has a CRM in place.

Step 1b:

We can export their entire book of business into Docupace, they can then use the integration feature to upload new clients that did not export into Docupace or are new.

Step 2: Send the advisor the link to eLearning with Docupace

Step 3:

Schedule training with their OSJ – this is a brief GoToWebinar with the advisor to cover creating a client, creating a client folder, creating a work item

Step 4:

Integrate with their CRM

Current CRMs

- Redtail
- Salesforce
- Wealthbox (coming in July)
- Smart Office