Yext Relate User Guide

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Yext Relate is a texting and voice platform that allows financial professionals to reach out to their clients directly. Yext Relate enables maintaining client contact with less effort by combining automation and human touch. Essential information about client relationships is used to give financial professionals and their teams context and guide them to reach out at the right time, strengthening relationships.

This guide provides an overview of the Yext Relate features and tools which help you along the way. The guide provides a better understanding of how using texting and voice can impact your return on investment.

Product Overview

Yext Relate is built atop the Yext business platform, the pre-eminent omni-channel digital engagement center for the financial services advisor. It tethers the most effective marketing, acquisition, and servicing channels in one ecosystem, enabling agents and advisors to focus on the most important part of their job—building and servicing relationships—without the friction of switching between systems or the fear of compliance backlash.

KEY FEATURES

Some of the high level capabilities of Yext Relate are:

- Sending Text Messages
- Sending Broadcast & Group Messages
- Scheduling Texts and Reminders
- Using Message Templates
- Sharing On-Demand Links
- Receiving VOIP Inbound Calls
- Making VOIP Outbound Calls
- Managing Contacts

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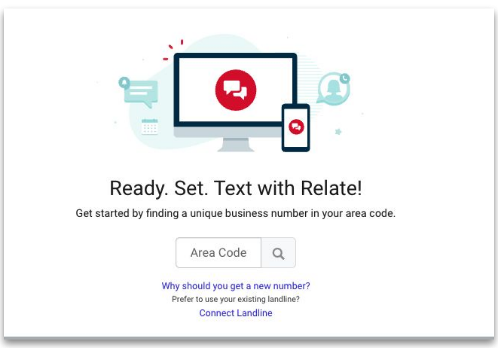
“Our field is the most productive it has ever been. We feel so much closer to our clients now that we are able to reach them at these critical moments.”

Getting Started

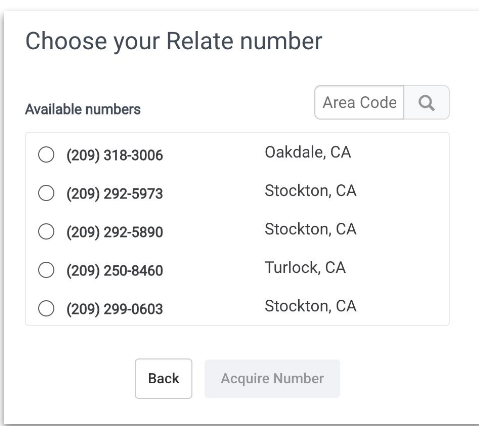
Create a Yext Relate Number Using a Desktop Computer

To create a Yext Relate dedicated number:

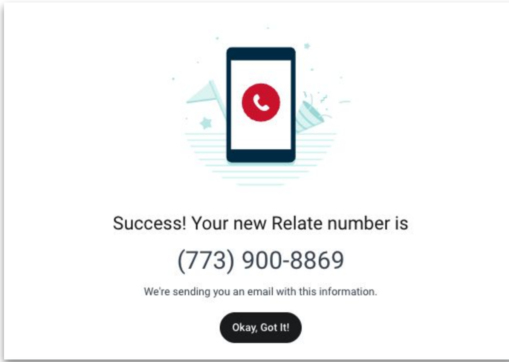
1. Log into your Yext workspace and click **Message & Call** from your side navigation bar.
2. Type in the 3-digit area code and click the magnifying glass to search for available local numbers.



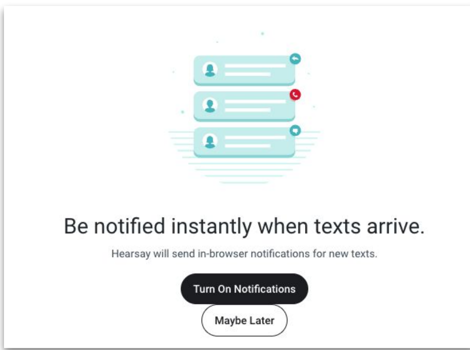
3. Choose one and click **Acquire Number**.



4. Click Okay! Got It. to complete the process. You will receive an email from support@hearsaysystems.com with your Relate phone number information.



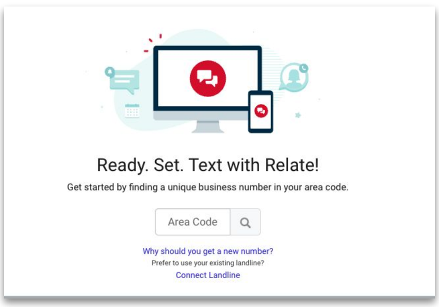
5. You will then be prompted to turn on notifications.



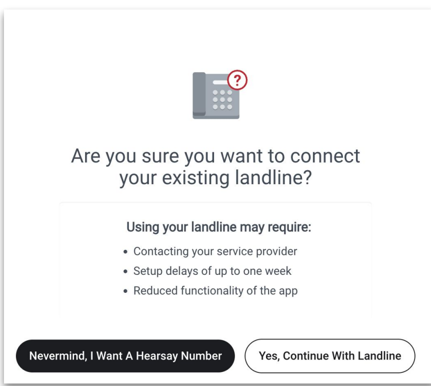
Connect an Existing Landline Using a Desktop Computer

To connect your text-enabled landline number to Yext Relate:

1. Log into your Yext workspace and click **Message & Call** from your side navigation bar.
2. Click **Connect Landline** located at the bottom of the pop-up screen.

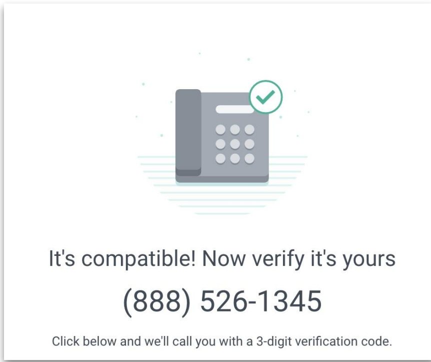


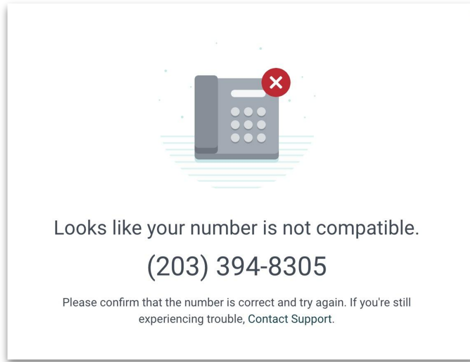
3. Confirm you want to connect your landline by clicking on **Yes, Continue with Landline**.



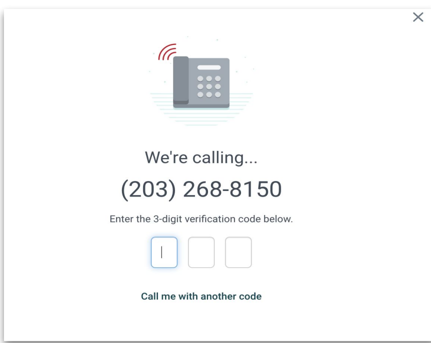
4. Enter your landline number and click **Check Compatibility**.
5. Your landline number will be checked for compatibility.

6. If your landline number is compatible, click Call Me With The Code to verify your number. If your landline number is not compatible, you will see a screen to Try Again or to contact Yext Support.

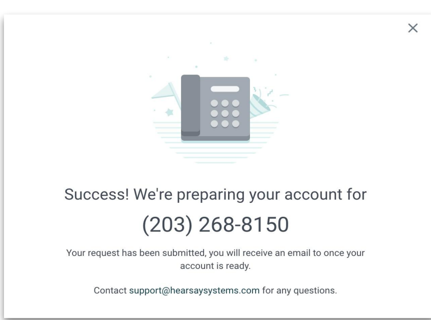




7. When you receive your call with the verification code, enter the code on the screen to verify your landline number.
   Note: If you enter your code incorrectly 5 times, you will need to start over.



8. Once you've successfully verified your landline number, you will see a confirmation screen. We will begin preparing your number for Yext Relate. Click **Done**.

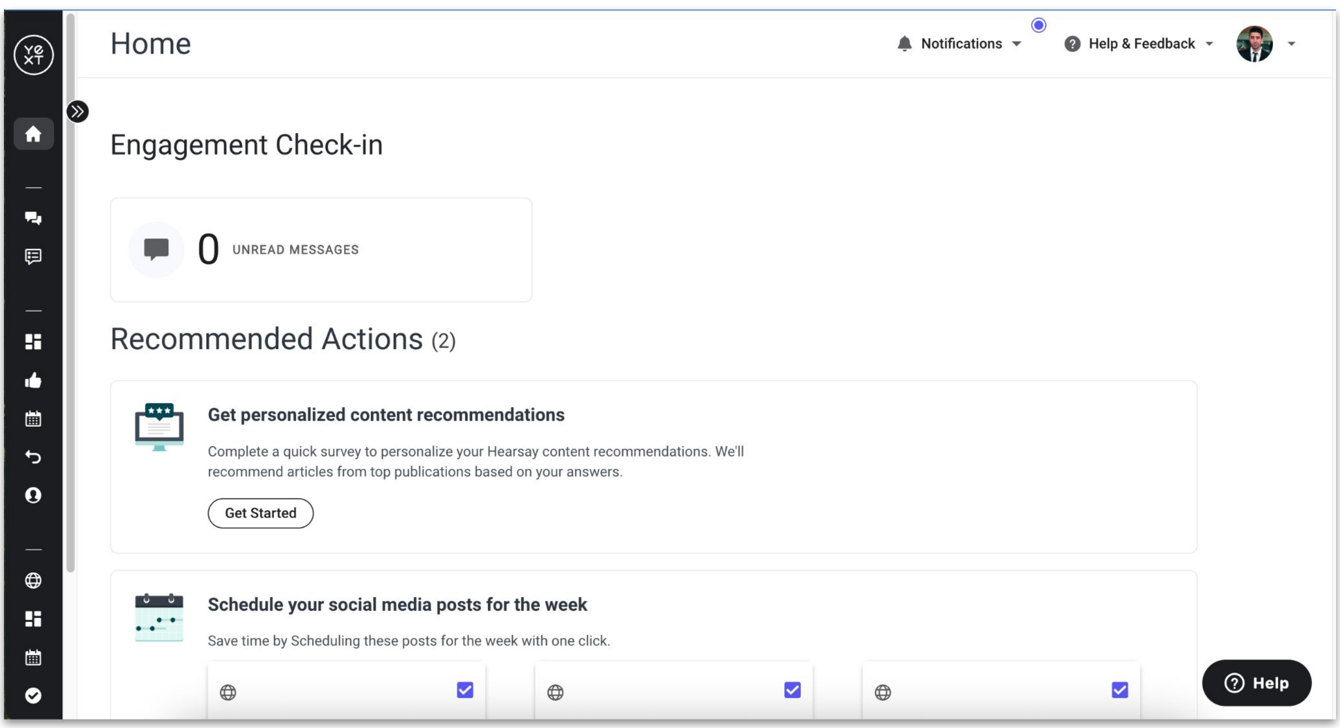


Home Page (for users with Social + Relate)

See Relate Notifications on the Homepage

To help users stay current on high-impact client engagement opportunities, the Engagement Check-In section on the homepage displays a count of unread Relate text messages.

If a user clicks Unread Messages, they are taken to the Conversations page, where they'll find unread text messages awaiting their review. **The Unread Messages tile only appears for Relate + Social users and does not include Social Direct Messages.**



**The homepage and homepage features are only visible to users with a Social license, and are not available to Relate-only users.*

Conversations

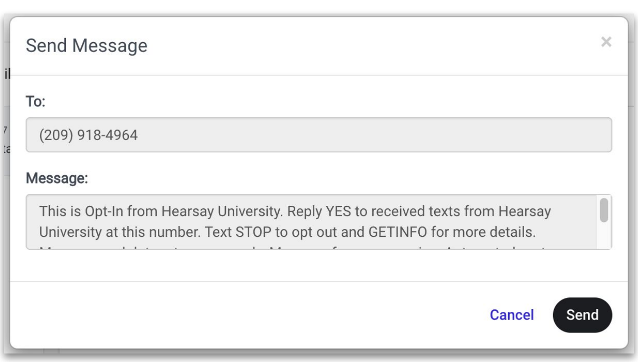
Attestation

Attestation is the process of requesting permission to text message customers or prospects. This means getting legal consent to have communication and activity monitored and retained. Opt-In is a process which puts the power in the hands of your contacts, helping protect you and your staff regarding telecommunication regulations. In order to text compliantly, your organization will have chosen from either of the following opt-in methods:

- **Opt-In:** Requires the user to send the opt-in message. The contact must respond "YES", verbatim, in order for the user to send further text messages.
- **Personalized Opt-In:** Allows the user to include a greeting message that appears prior to the opt-in message. The contact must respond "YES", verbatim, in order for the user to send further text messages.
- **Implied Opt-In:** The user sends the opt-in message and is able to send follow-up text messages directly after. The contact can opt out of the conversation at any time by responding "STOP".

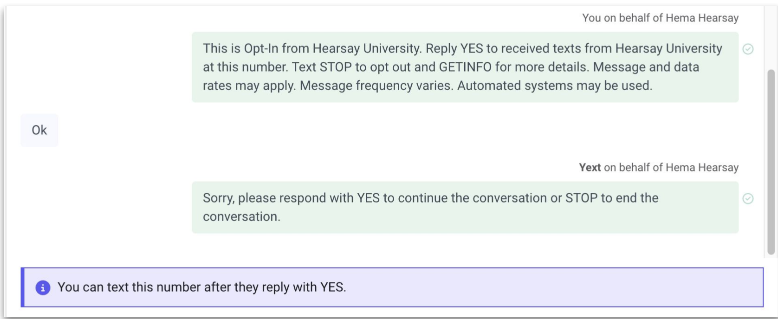
Send the Opt-In Attestation Text

If your organization requires Opt-In Attestation, in order to compliantly text your contacts, you will need to send them the Opt-In (Attestation) message before you can begin using your own custom language. Once your contact responds YES, you will then be able to text them using your own custom language. If the contact does not respond for 24 hours, you will be able to re-send the opt-in message again, up to 5x in total.



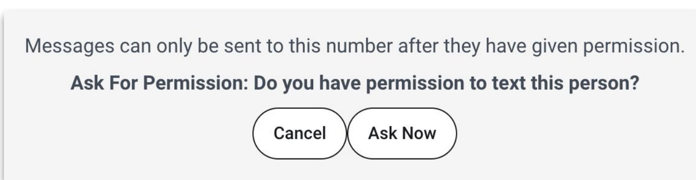
Opt-In Guidance Follow-Up Text

If a client responds to an attestation request with something other than YES, they will receive a follow-up instructional text telling them that they either need to respond with YES to continue or STOP to end the conversation.



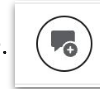
Resend the Opt-In Attestation Text

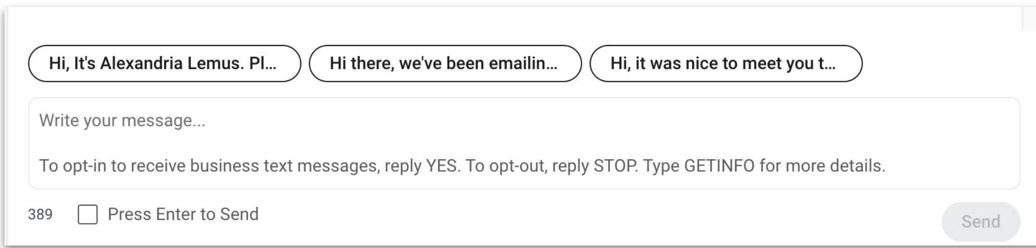
If the contact does not respond for 24 hours, you will be able to re-send the opt-in message up to 5 times total. To resend, locate your contact's conversation and click Ask Now. This button will only re-appear once 24 hours have passed since your prior attempt.



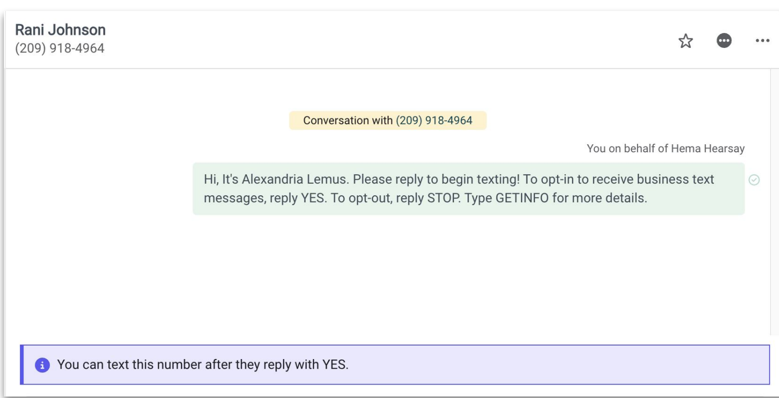
Customize the Opt-In Attestation Text

If enabled and approved by your organization, you will have the ability to customize the language included in your Opt-In message:

1. Click the **New Conversation** icon in the top-right corner of your workspace. 
2. Type in the name or phone number of the contact you wish to text.
3. You will be presented with the screen shown below. Type in your custom text where it says, "Write your message..." to proceed. Once you have typed in your message, click **Send**. **Note: Per compliance rules, the following message will be appended with your text: "To opt-in to receive business text messages, reply YES. To opt-out, text STOP. Type GETINFO for more details."**

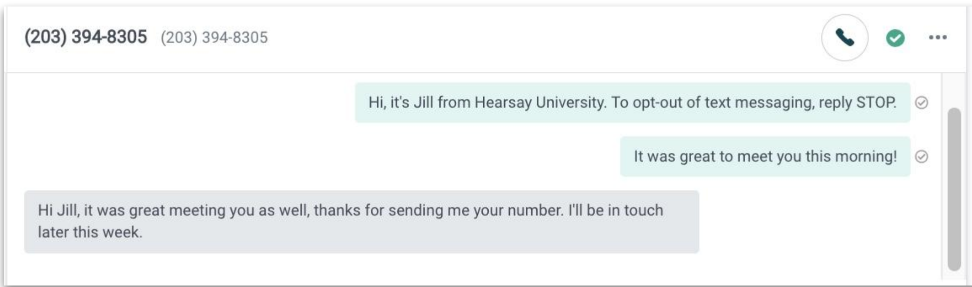


4. Your message will then be combined with your organization's Opt-In requirement, allowing your contact to respond YES once they are ready to text.

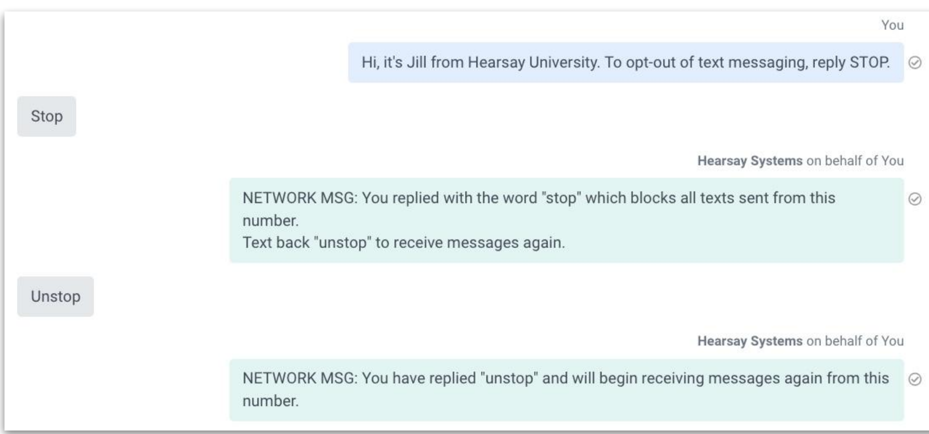


Implied Opt-In

Another option available based on your organization's compliance policy is the Implied Opt-In method. This prompts you to first send the opt-in message. However, directly after, you can begin texting your contact using your own custom language without the contact needing to respond YES. Your contact can opt out of the conversation at any time by responding STOP.



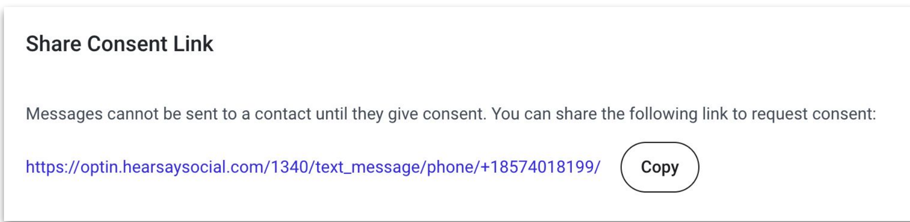
If a contact writes STOP, Relate will send a message on your behalf letting the contact know that communication has been halted. However, the contact can respond UNSTOP to reinstate communication at which point Relate will send a second message on your behalf.

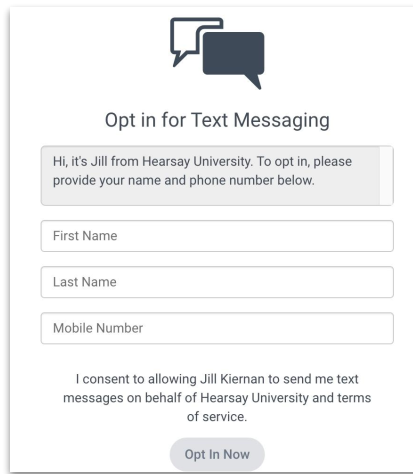


Opt-In Web Link

The Opt-In Web Link enables you to allow your audience to opt-in to texting you without needing to send them an opt-in text message. To do so send the Opt-In link:

- Click **Account Settings** and then copy the Share Consent Link. This link can be shared within email or on social media and allows your customers to agree to your opt-in message on their own.
- When your customer clicks on the link, they will be prompted to enter in their first name, last name, and phone number. They will then click **Opt-In Now**.





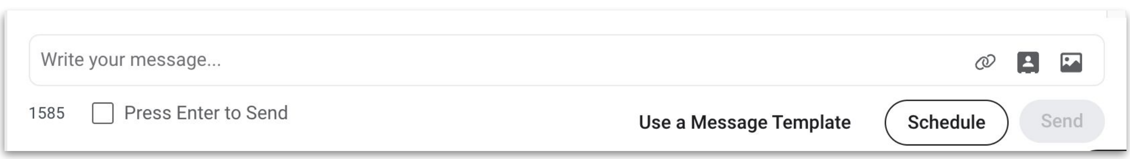
Once a customer completes this form, your Relate account will update automatically, and you'll be able to send text messages to users who have opted into texting you, instantly. Depending on your organization's settings, once a customer completes the form, they will immediately receive a follow up text from you letting them know that they have opted in for texting. Check with your administrators to determine if you have the Opt-in Follow up Text feature enabled.

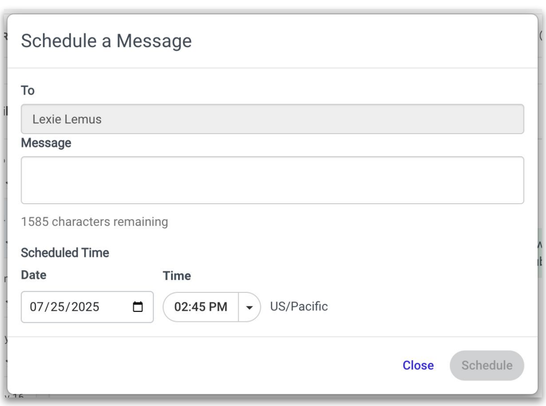
Send and Schedule Text Messages

When logged into Relate on your computer, you can send and schedule text messages from within an existing conversation.

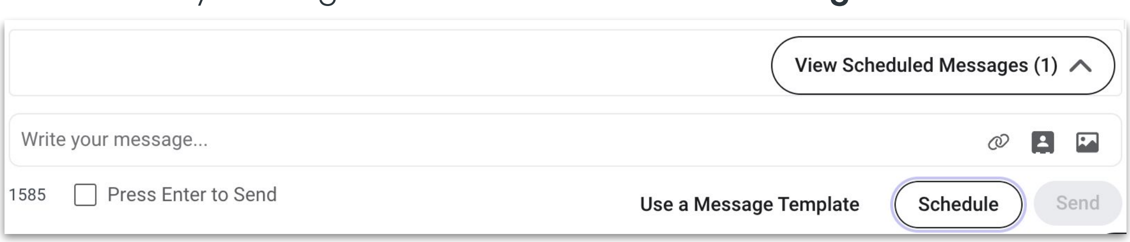
To send and schedule text messages from your computer:

1. Log into Relate on your computer.
2. Go into an existing conversation with a contact.
3. At the bottom of the screen, type your message. To include a visual image within your text message, click the Photo icon and choose the image or file from your computer. Click **Send** to send the message immediately. Continue to step 4 if you would like to schedule your message instead.
4. Select **Schedule** and then follow the on-screen prompts to select a date and time.
5. Click Schedule to complete the process.

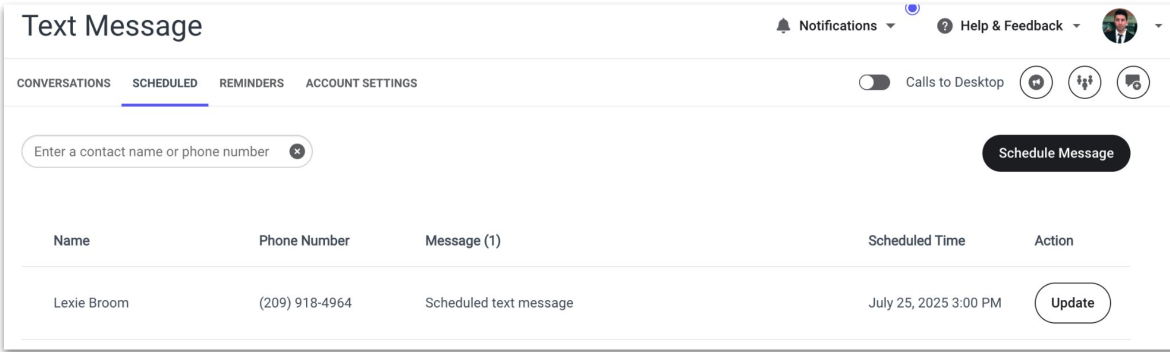




You can view your scheduled messages within your conversations with your contacts by clicking on the **View Scheduled Messages** arrow.

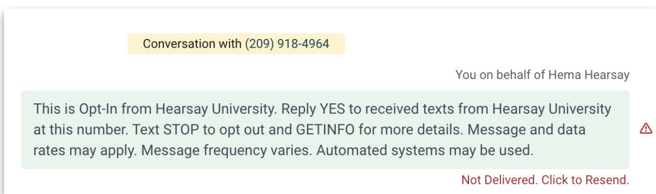


You can also view and modify your scheduled text messages by clicking on the Scheduled tab from the top navigation bar. From here, you can change the text, date, and time of the message. You can also unschedule the message entirely.

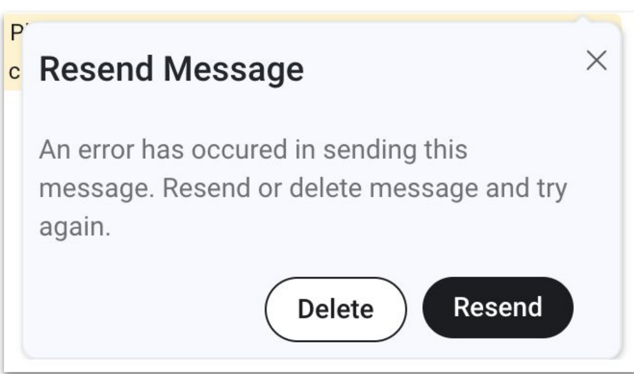


Resend a Text Message

If your text message does not deliver to your contact, Yext will display a "!" icon next to the text affected message. By tapping the "!" icon, you will be presented with the following screen which will prompt you to resend the text message a second time.



If you are resending an opt-in message, click **Resend** to complete the process, or click Cancel to return to back to the conversation, where you'll have the option to resend the message at your convenience.



If you are resending a regular text message and not an opt-in message, you'll have both above options in addition to clicking **Delete** which will delete the text message from your conversation and prevent it from being sent to the contact.

Quick Replies

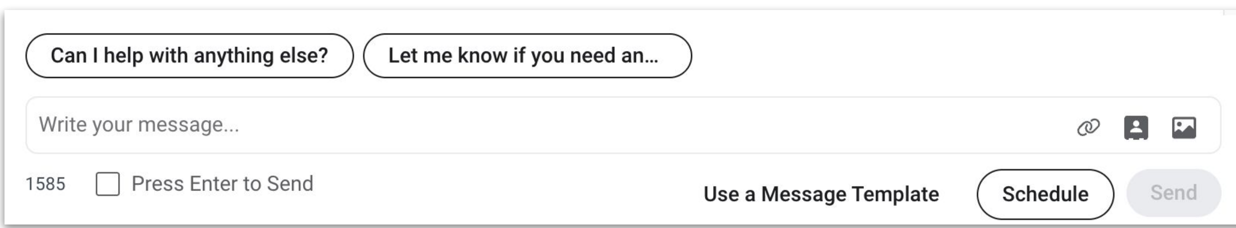
With Quick Replies, you can easily select canned responses that are generated contextually based on conversations that contain common inquiries related to claims, meetings, policy changes and more. With Quick Replies, you can:

- Leverage auto-generated replies within the app
- Choose from three automatically generated messages designed to help you respond quickly and keep the conversation going

To use Quick Replies:

Once a response from a contact is received, you can choose from three automatically generated messages.

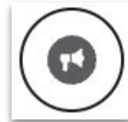
1. Click on the **Quick Reply** that you'd like to send.
2. The selected message will appear in the text field. You can edit and customize the text if you'd like.



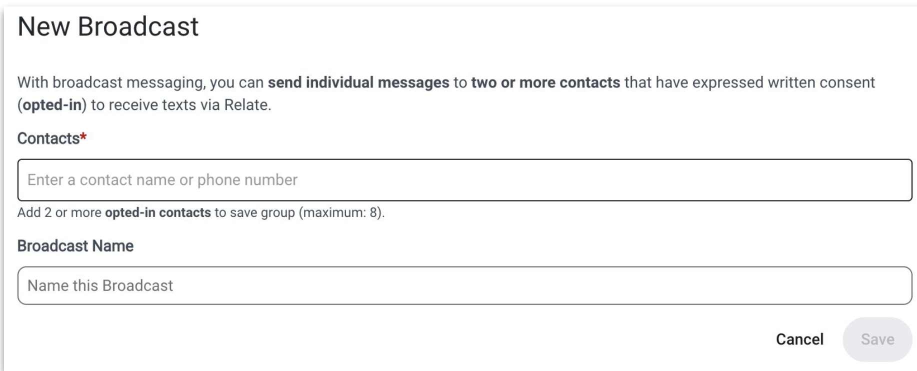
Broadcast Messages

With Broadcast Messages, you can write a single text message and share it with up to 40 recipients. Your contacts will receive the text message individually and privately, allowing them to continue the conversation based on their specific needs. Broadcast Messaging enables you to share important information with your customers, privately, without needing to send the same text message over and over again.

To create a broadcast message:



- Log into Relate and click on the megaphone in the top-right corner.
- Accept the disclaimer message that pops up.
- Name the broadcast message so that you can easily find it when you need it and include the names of the contacts you wish to send the message to.
- Click **Save**.
- At the bottom of the screen, type in your broadcast message.
- Once finished, click Send.



The text will then appear in the conversation window with a megaphone icon appended, indicating the message was sent to multiple recipients.

If one of your recipients responds, their individual Conversation tab will turn blue, indicating a new message was received. Clicking into the conversation, you'll see your broadcast message appended with the megaphone icon and your recipients' response will be listed below privately.

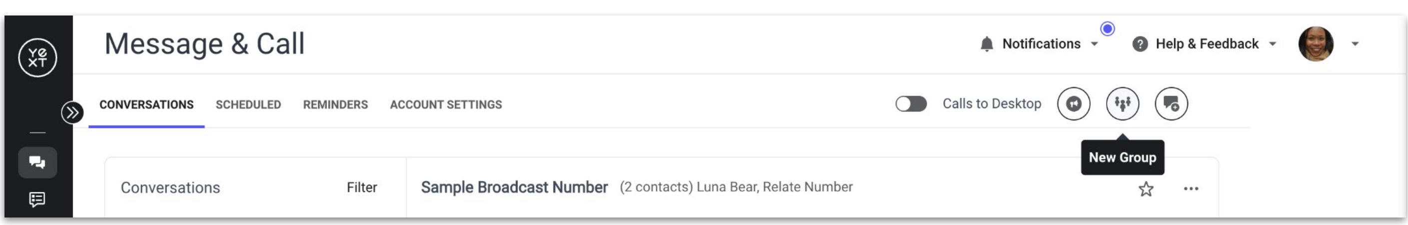
Additional Notes:
Users must send their first text via the desktop application. After that, users can send broadcast messages from either the desktop or mobile application.
Replies to messages sent with broadcast lists will never go back to the broadcast list, but will instead appear as individual 1-1 messages. It is important to note that broadcast messages should not be equated with group texting.

Group Texting

Group Texting allows users to send and receive messages as well as share files (in JPEG, GIF, and PNG formats) with groups of up to 9 contacts simultaneously, while also meeting compliance guidelines. Group Texting makes several use cases possible, such as allowing a wealth advisor to simultaneously hold conversations with multiple individuals in a household, or empowering an insurance agent to communicate with many different team members in a client organization at the same time.

To create and send a group text on Yext Desktop, log in to your account and follow these steps:

- Log into Yext Relate and click **Message & Call** from the left side menu.
- Click the **New Group** button located at the top right of your conversations.
- Search for and add between 2 and 9 contacts that you would like to include in the group text. Only contacts who have opted in to receiving messages appear in this list. If a contact has not opted in to receiving messages, they must complete the organization's opt-in process before that can be added to a group. Toll-free numbers cannot be added to a group.
- Under Group Name, enter a name for your group, then click Save. The group name can be edited later, if needed.
- Confirm if all the necessary contacts have been added to your group, and in the pop-up window, click Yes. If you need to add more members, click Cancel. Once a group has been created, new contacts cannot be added and existing contacts cannot be removed from the group.
- Your new group will appear in the Conversations tab and you can start sending messages to it. Once the text is received by group members, anyone in the group can respond.

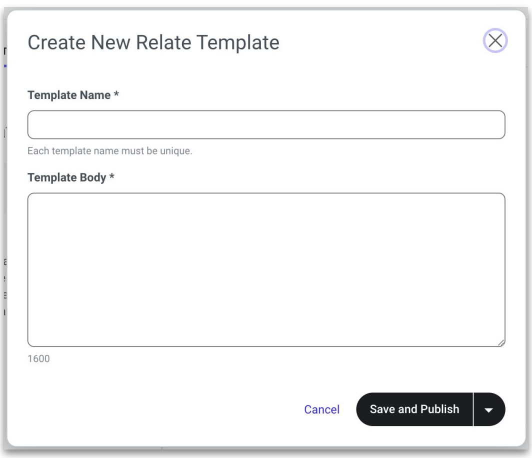


Message Templates

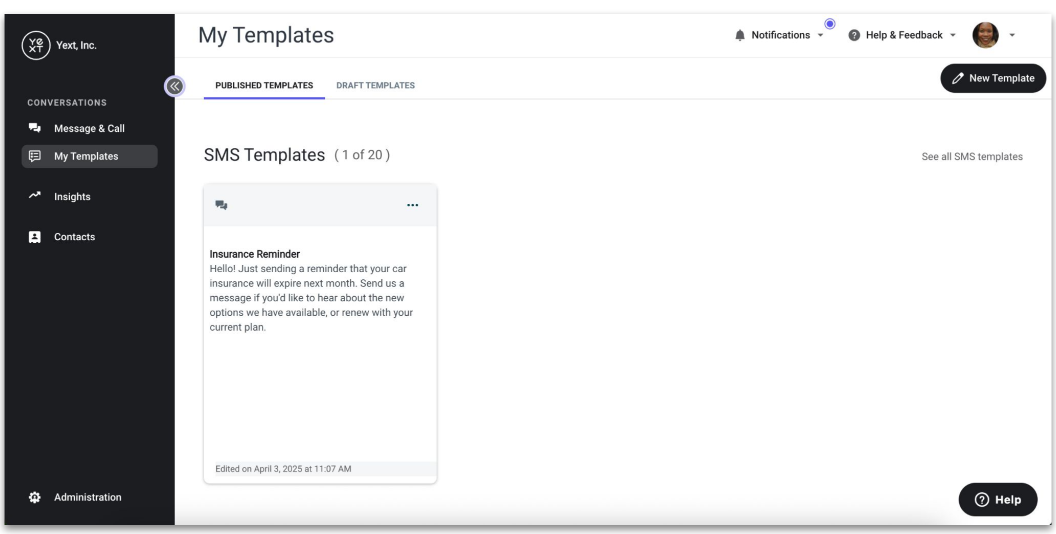
Message templates allow users to save time when sending the same message to different clients. Users can access available templates that your organization has created in the Relate message composer. If enabled, users can also create their own templates in the My Templates tab.

To create a template:

- From the side menu, under Conversations, click My Templates.
- Click on the button for New Template at the top right. This opens the Create New Template publisher where you can enter the template name and text. Then select to save as draft or publish to your message templates.

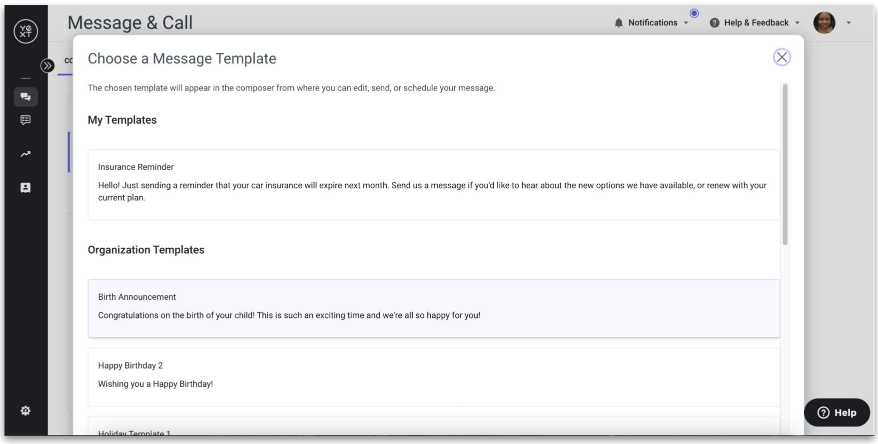


- Published templates can be deleted but they cannot be edited after publishing. A new template would need to be created if any changes are required.

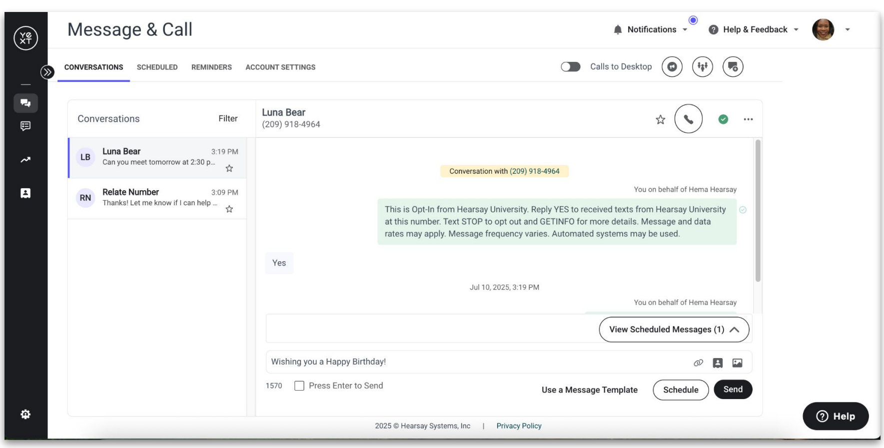


To add a template to a text message:

1. From the side menu, under Conversations, click Message & Call.
2. Open the Relate message composer by selecting an ongoing message chain or by clicking the new message icon in the top right of the screen.
3. Click **Use a Message Template** at the bottom of the screen.
4. Choose one of the available options in the message templates pop out.



5. The text of the selected template will be entered into the message composer, where you can edit, send or schedule to send the message.

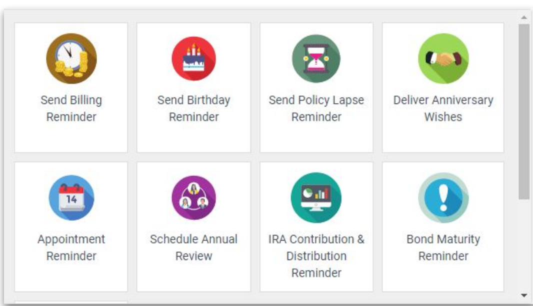


Reminder Messages

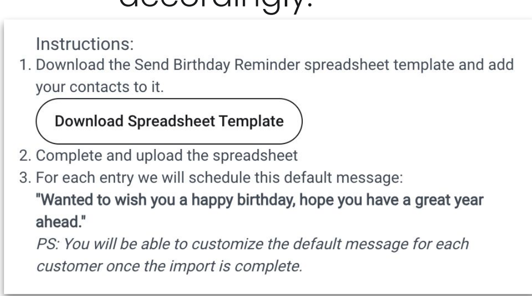
Reminder messages allow you to schedule greetings, birthday wishes, and appointment reminders for either a select group of contacts or your entire book of business with just a few clicks. By entering in the appropriate information within a spreadsheet, Yext Relate can templatize important text messages and schedule them at the appropriate time. This helps ensure that you never miss an opportunity to connect with your network during the most important times of the year.

To get started, follow these steps:

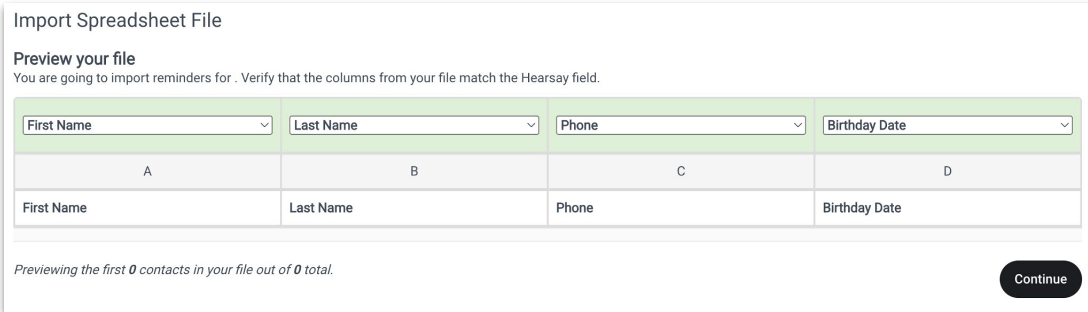
1. Log into Yext Relate and click Reminders from your navigation bar.
2. Choose from the available categories and then click Download Spreadsheet Template. A .CSV file will download to your computer which can be opened in Microsoft Excel.



3. Required fields will be listed in row 1 that correspond to the category you chose. Fill in the data appropriately and remember you can include 1 contact, 10 contacts, 100 contacts or even your entire book of business in this form.
4. Once finished, save the changes in Excel and return to Yext.
5. At the bottom of the Reminders page, click Select File and locate the .CSV on your computer. Once the .CSV has uploaded, you'll be brought to a preview page which will list the first 3 contacts in your file. If Yext is unable to recognize a column, simply assign it by clicking the drop-down menu and assign accordingly.



6. Then click **Continue**.



As long as your contact has consented to communicate via text messaging, all scheduled text messages will be listed with the ability to personalize them if needed. And when ready, click Schedule and choose to send the message on the date presented, referenced from your .CSV file, or choose Custom to set it for a different date.

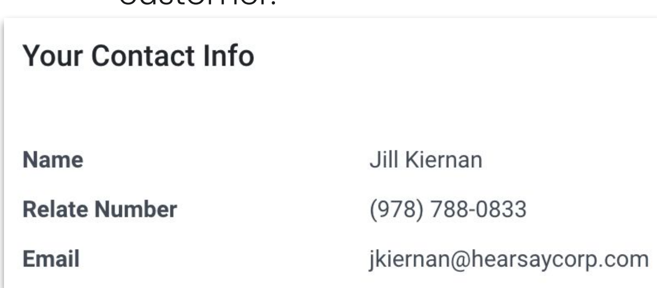
Once chosen, the page will clear and your scheduled text message will appear on your Scheduled page where you can customize or update the date parameters as many times as needed ahead of its scheduled share time.

Share your Contact Card in Text Messages

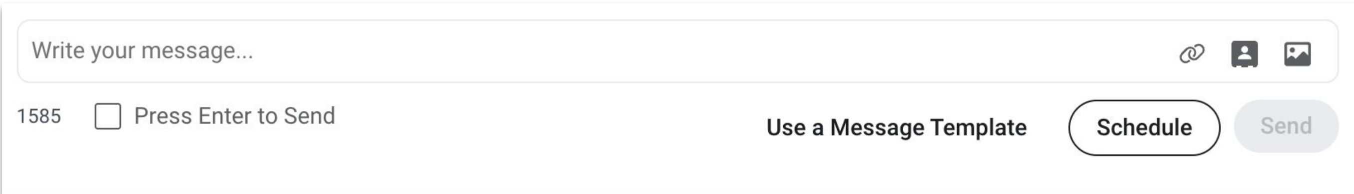
Relate makes it easy for your customers to save your contact information in their phone via Contact Cards. Like a business card but better, this allows you to send your name, phone number and email address at the same time so that your customer can simply save the contact card into their address book.

To verify and send your contact card, follow these steps:

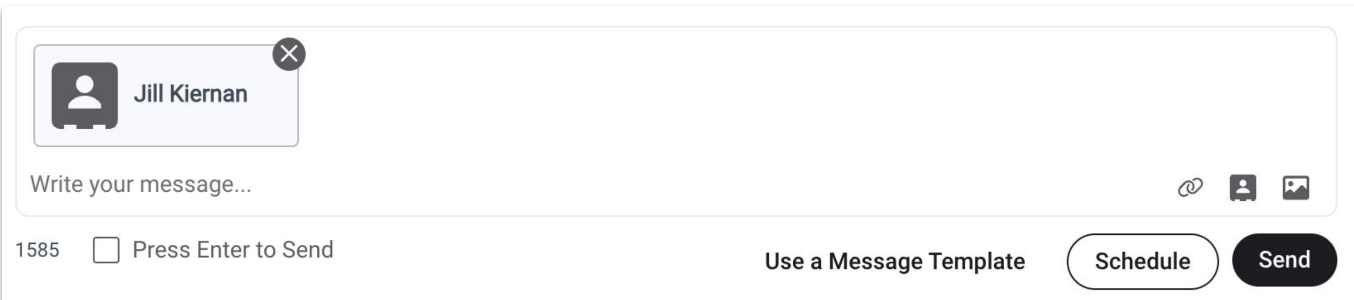
1. Log into Relate on your computer and click **Account Settings** from your navigation bar. The information listed will be the information shared to the customer.



2. To send a Contact Card, click Conversations.
3. Click the Attach Contact Card button in the bottom right corner.



4. The contact card will be added into the body of the message where you can include more information if necessary. Click Send to complete the process.

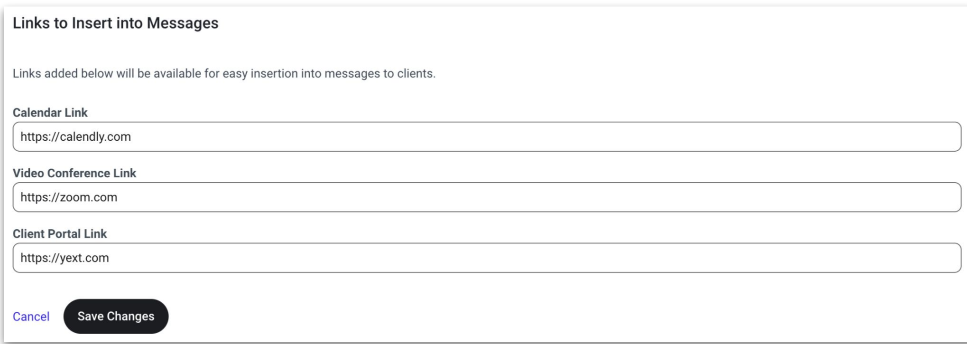


Once sent, the customer can tap the Contact Card to view it on their phone where they can then tap "Create New Contact", “Add to Existing Contact”, or “Update Contact” to save your information to their address book.

Share On-Demand Links in Text Messages

In Relate, you can save links on-demand and share them in seconds when your customers need them most. To add your links and insert them in text messages, follow these steps:

1. Log into Yext Relate on your computer and click your Account Page as links can only be added via this process.
2. Scroll down until you see several text-editable fields where you can include your own links. The sections act as guidelines but you can add whichever links you share most with your customers.



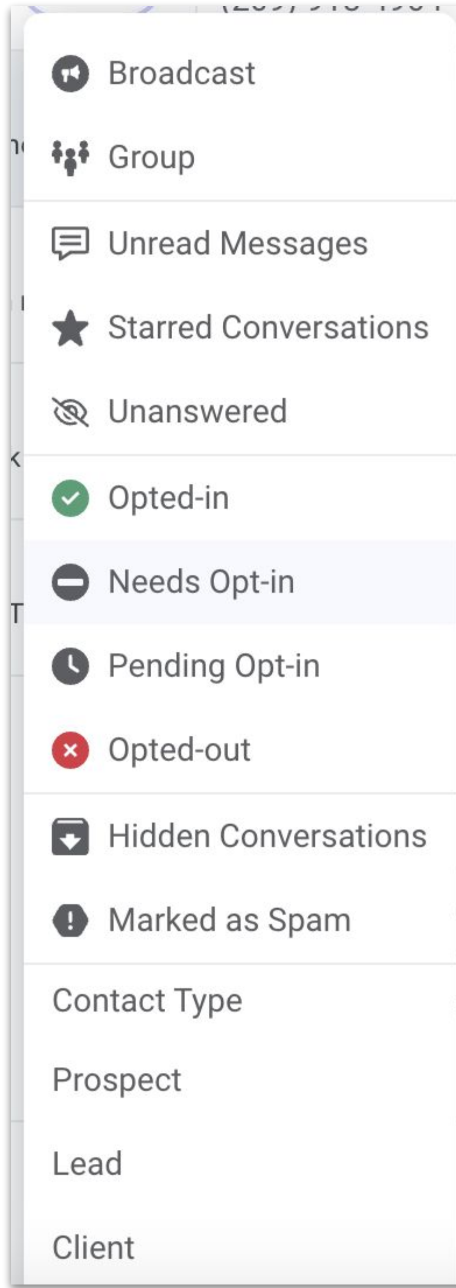
3. After you've included your links, click Save Changes.
4. When texting a customer, click the link symbol (🔗) to the right of your composer box and choose one of your saved hyperlinks. Click **Insert** and the link will be placed in the body of your text message, removing the need to manually re-type this link for all future messages.

Note: Links must begin with https:// (yext.com > https://yext.com)

- http:// and www. will not work
  - http:// is missing the required "s" in the hyperlink and must be rewritten as https://
  - www. must be rewritten as https://
- Links that redirect to another website (such as bitly.com and TinyURL.com) are not supported.

Filter Conversations

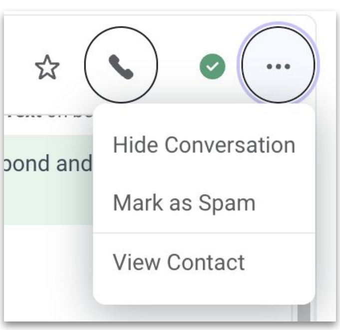
You can filter your conversations within Yext Relate by selecting Filter within the Conversations tab:



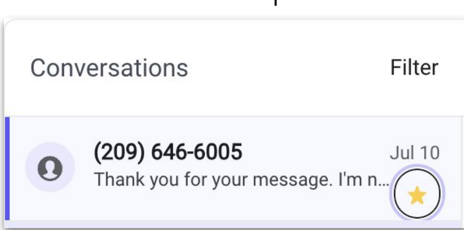
Broadcast: Messages sent using the Broadcast feature
Group: Group messages will appear
Unread Messages: Messages you have not yet read
Starred Conversations: Messages that have been starred/flagged as important
Unanswered: Messages you have read but have not answered
Opted-in: Contacts who have replied YES to your opt-in message
Needs Opt-in: Contacts to whom you have yet to send the opt-in message
Pending Opt-in: Contacts who have yet to answer your opt-in message
Opted-out: Contacts who have replied STOP to your opt-in message
Hidden Conversations: Conversations you have set to hide and are hidden from your main conversations list
Marked as Spam: Conversations you have set to spam and will no longer receive incoming text messages from the contact
Contact Type: Prospect. Lead, Client, Other, Internal

You can choose to hide or mark a conversation as spam from a conversation by selecting the three-dots icon on the right-hand side to display your options. In addition, Workspace Owners can conceal select text messages to keep sensitive information private.

Mark as Spam: removes the conversation from your Conversations window and blocks all incoming text messages from the contact.
Hide Conversation: removes the conversation from your Conversations window.
Conceal a Message from View: removes the conversation from your Conversations window. if a customer sends a text message which includes sensitive data that should not be visible to your workspace members, such as a social security number, password, or more, Yext Relate can conceal the message to prevent it from being viewed in the software. This feature is helpful when the customer needs to send important information to their advisor or agent, but afterward, for privacy and security reasons, would need the information deleted, similar to a paper shredder for printed documents. This action cannot be undone and will trigger a notice to your compliance team.



You can star and un-star conversations from the conversation header and the conversation preview list. Being able to star and un-star conversations simplifies prioritization and follow-up tasks. It allows you to flag important conversations and respond more quickly and effectively. This functionality is currently only available on Relate in Desktop.

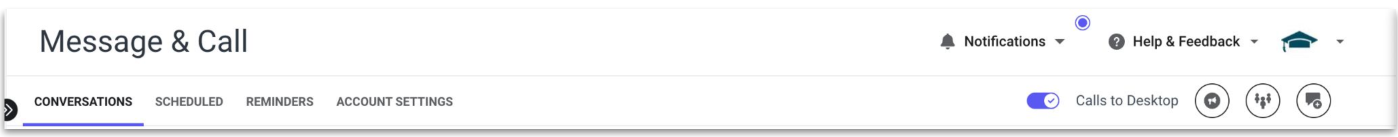


Phone Calls

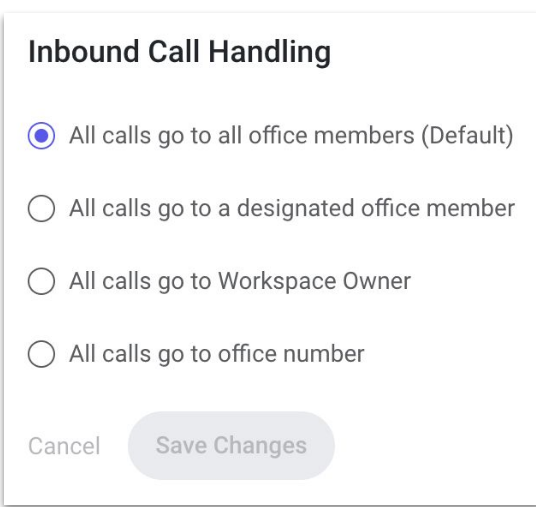
Answer Incoming Yext Relate Calls from Your Computer (Inbound VOIP)

When a customer calls your Yext Relate number and you've downloaded the Yext Relate mobile application, your mobile device will ring notifying you of the call. Yext Relate users can also answer incoming calls on their computer using VoIP technology, allowing them to integrate customer phone calls right into their established workflow and helping ensure a customer call never goes unanswered.

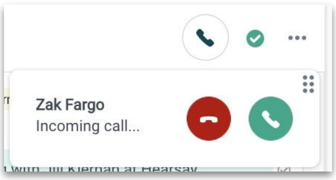
To enable this, log into Yext Relate on your computer and make sure that the "Calls to Desktop" function is toggled on, noted by the checkmark icon.



Next, you can choose to either have incoming calls ring for all workspace members, a designated workspace member such as yourself, or to have phone calls forwarded to a specific phone number by clicking on the **Account Settings** tab from your navigation bar and scrolling down to Inbound Call Handling.

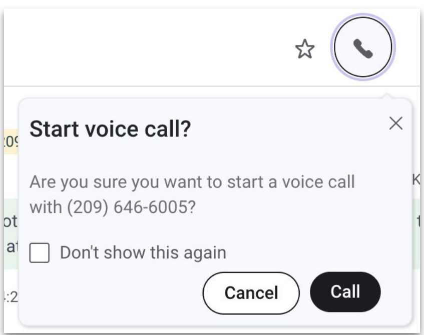


If you've designated incoming phone calls to be received by either you or your entire team, your mobile device and desktop will alert you when a new call is coming through. Simply choose to answer or dismiss the call. Once you or a member of your team answers the call, the notification will end and the call history will be recorded on the Phone tab on your Relate mobile app.

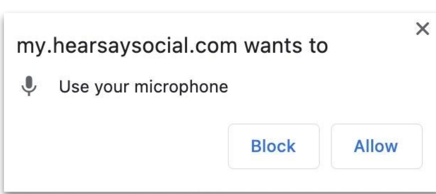


Make Outbound Yext Relate Calls from Your Computer (Outbound VOIP)

When desktop calling is enabled, Yext Relate users can place outbound calls directly from a conversation using VoIP technology. The call will automatically go to the phone number for the current conversation. Calls can only be made to phone numbers that have already engaged in a text message conversation.



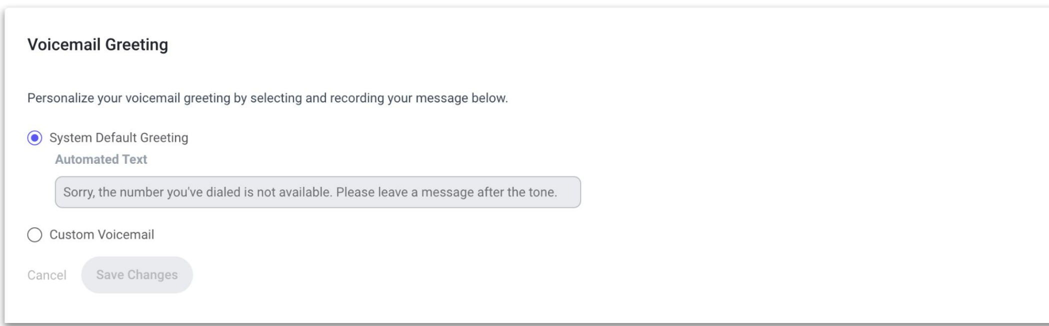
Make sure that your microphone is enabled before making an outbound call via Yext Relate. Similar to inbound calls, the call history will be recorded on the Phone tab on your Yext Relate mobile app.



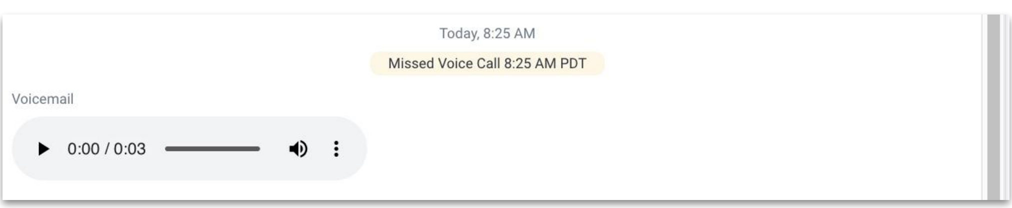
In-App Voicemail

In-app voicemail increases productivity and improves the client experience by allowing any workspace member to respond to voicemails as well as create customized greetings and disclaimers. When voicemail is enabled, unanswered inbound calls go to a Relate voicemail system. Relate voicemails can be accessed within your Relate conversations.

By default, the voicemail greeting will use a standard, generic read out: “Sorry, the number you’ve dialed is not available. Please leave a message after the tone.” You can also record a custom greeting in the Account Settings page. When recording a custom greeting, make sure to enable microphone access.



When voicemail is enabled and you receive an inbound call, the phone will ring for approximately 40 seconds and then go to voicemail if no one answers. The caller will hear either the standard greeting or the custom greeting (if set). After you have missed an inbound call, the voicemail will now show up in the conversation. You can play the voicemail directly from the conversation view by pressing the Play button ▶ .

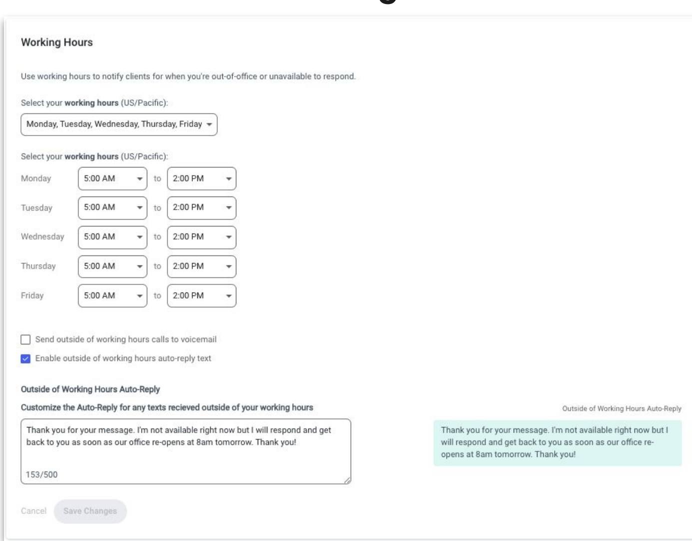


Set Working Hours and Auto-Reply

Yext Relate workspace owners and members can define working hours and deliver an automated text message response if a client texts them outside of those set hours. They can also send outside of working hours calls to voicemail. These workflows provide a responsive client experience outside of work hours.

To set working hours:

1. Log into Yext Relate on your computer.
2. Click Account Settings from the navigation bar and scroll down to Working Hours.
3. Checkmark which days of the week your business is open.
4. For each day, designate the time at which your business opens and closes. Once a workspace has its working hours set, you have the options to send outside of working hours calls to voicemail and set an outside of working hours auto-reply text message for texts received outside of working hours. This message is sent only once to the contact in a given 24-hour window. This auto-reply message is limited to 160 characters and is run through your organization's lexicon to ensure banned words are not used.
5. If desired, underneath the working hours section, checkmark the box that states Enable outside of working hours auto-reply text.
6. You will then be presented with a box where you can enter in your custom message.
7. Click **Save Changes**.

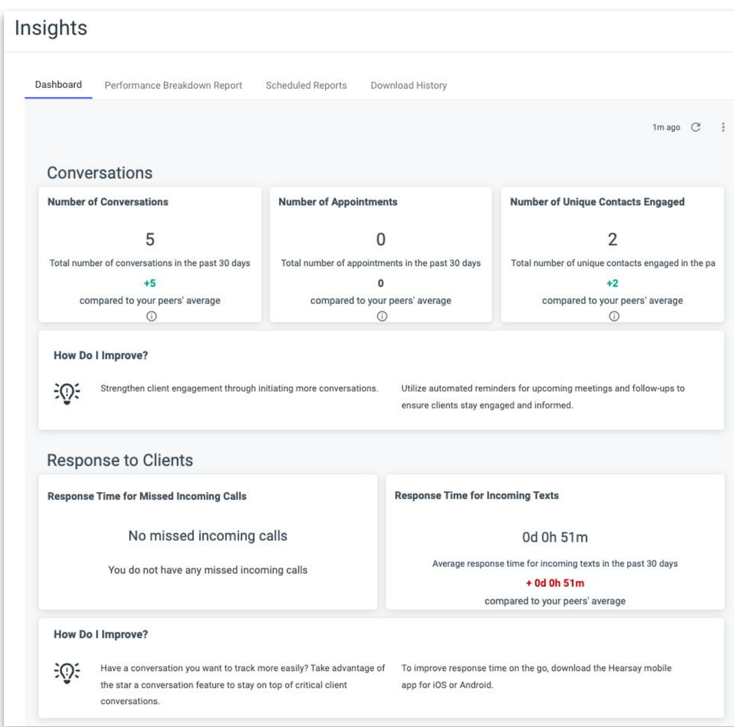


Insights

The Relate Insights dashboard is available to users from the Insights page. The Relate Insights dashboard provides data and visualizations of key business measures over a 30-day period for an individual workspace, identifies where a user's Relate performance is better or worse than the performance of their peers, and gives recommended actions to boost client engagement.

The Relate Insights dashboard provides the following measures:

- Number of Conversations
- Number of Appointments
- Number of Unique Contacts Engaged
- Response Time for missed incoming calls
- Response Time for incoming texts
- Number of Incoming/Outgoing calls
- Number of Incoming/Sent messages
- Number of New Contacts
- Number of Contacts Opted-In



Contacts

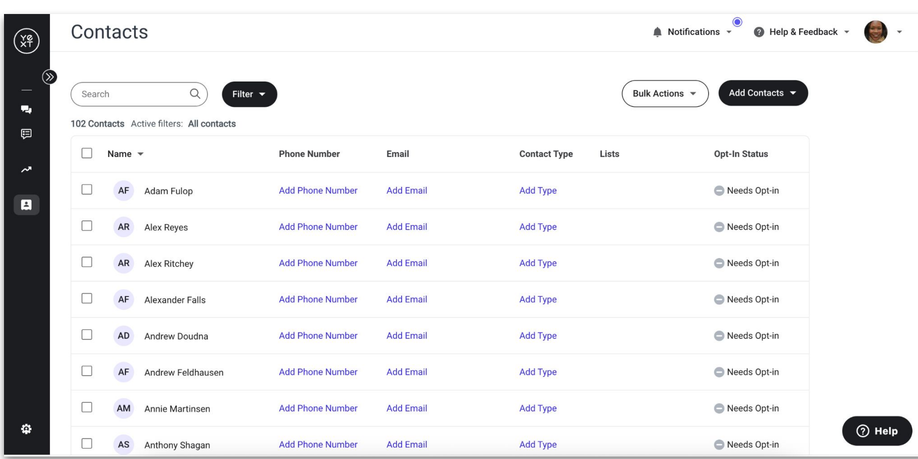
Manage Your Yext Contacts

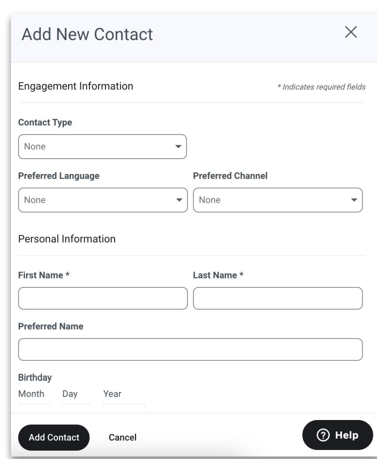
The Contacts tab consolidates channel-specific contact lists. Contacts will display all names and phone numbers associated with your Yext workspace. If granted permission, Yext Relate will also display your mobile phone's contact list on the mobile-app, enabling you to text or call a number saved outside of the application. You can search through your existing contacts and classify the type of contact. The contact type helps you to gain valuable customer journey insights by tracking where your customer is in the marketing funnel. The available contact types are "Prospect", "Lead", "Client", "Other", and "None".

Relate users can click on **Add Contacts** to add new contacts without needing to start a new conversation.

To add a contact, simply follow these steps:

1. Select the **Contacts** tab on the side navigation bar.
2. Click the **Add Contacts** dropdown and choose Add Contact to add an individual contact.
3. A side drawer will open that looks like the image below. Fill out the required fields: First Name, Last Name, and Phone Number. If you'd like, you can fill out the optional fields: Contact Type, Preferred Name, Birthday and Email Address as well. Then click Add Contact.

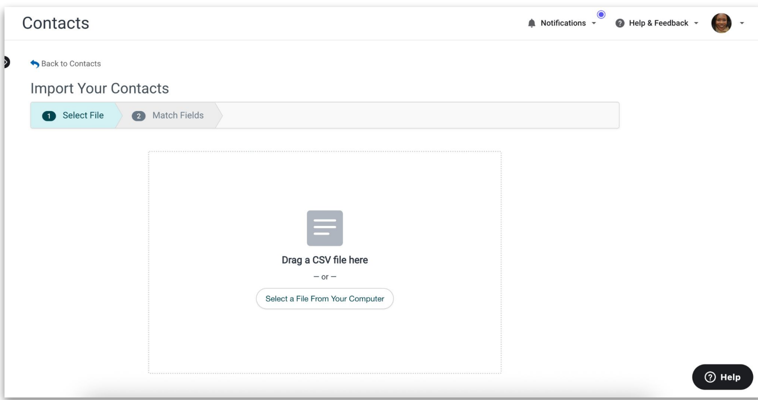




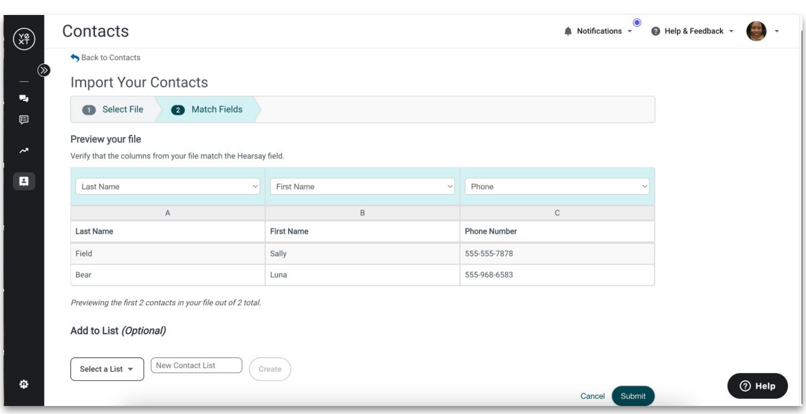
Add Contacts in Bulk

To add contacts in bulk, simply follow these steps:

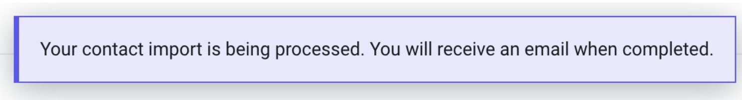
1. Select the **Contacts** tab on the side navigation bar.
2. Click the **Add Contacts** drop down and choose **Upload Your Contacts**.
3. Click the **Select File From Your Computer** button or drag and drop your contacts file into the panel to the right. This will prompt you to locate a .CSV file on your computer that contains your contact information. The .CSV file must include the following columns: First Name, Last Name, and Phone Number.



4. You will be presented with a preview of your .CSV file. Note: This is only a preview, as demonstrated by the text under the table which reads "Previewing the first X contacts in your file out of x total." If needed, you have the ability to toggle the fields by pressing the arrow buttons to reassign the column. Once completed, click Submit to complete the process.



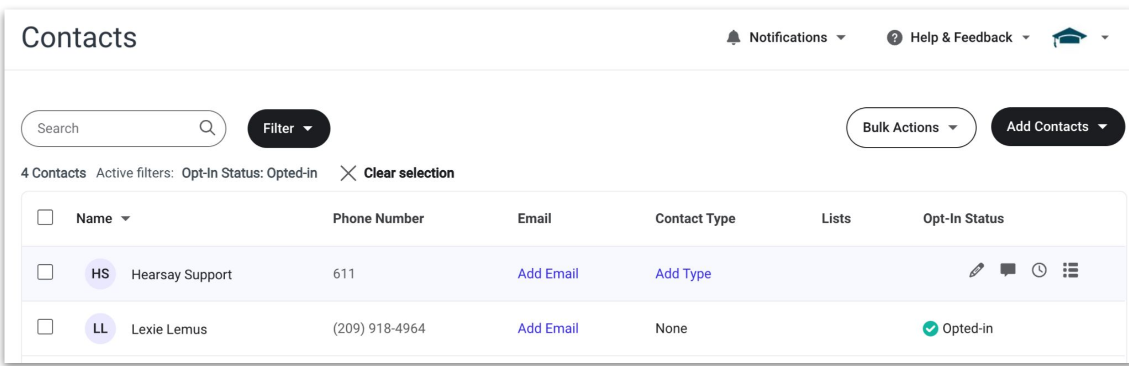
5. You will receive the contact import confirmation message.



Note: Per your organization's policy, you may be able to exports contacts from your email account or CRM. If you need assistance exporting your contacts from your email account or CRM, please review our help center article here.

Search for Contacts

1. Select the **Contacts** tab on the side navigation bar.
2. In the Search box, type the name of the person, then click within the box or press enter.
3. Hover over the Opt-In Status to show the Action icons and click on the desired action.

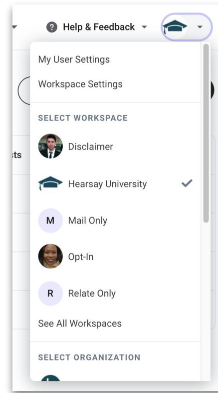


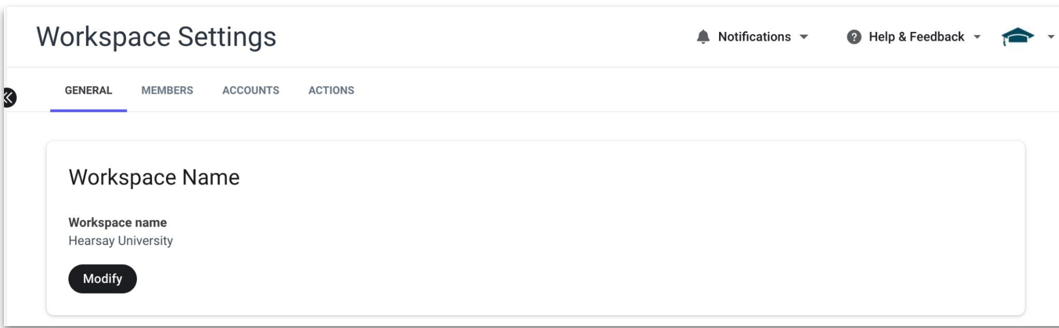
Edit Contact New Message Schedule a Message Add to List

Settings

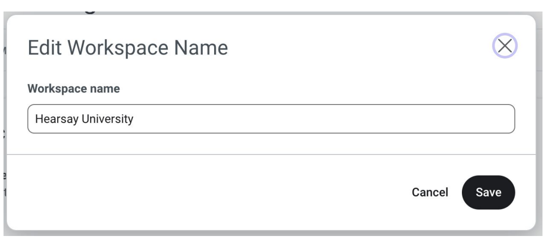
Workspace Settings

A Workspace is an instance of Yext. You can invite multiple users to a Workspace such as assistants or team members to help you manage your Yext Relate account. To update your Workspace, click on **Workspace Settings** from the workspace icon dropdown located at the top of your screen.





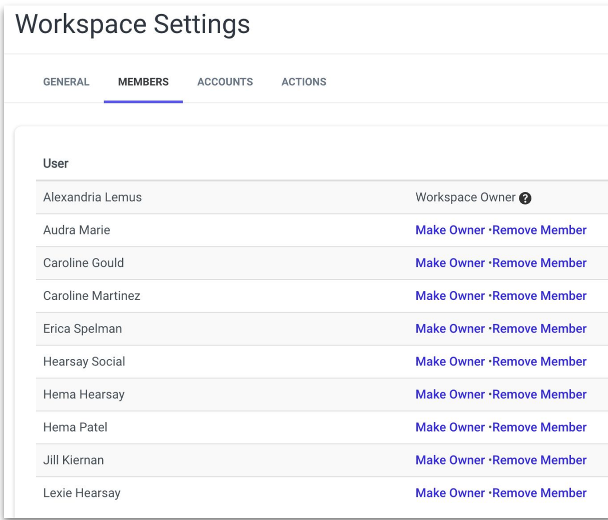
To change the Workspace name associated with your Relate account, select **Modify** and enter the new name in the pop-up box. Then click **Save**.



Members

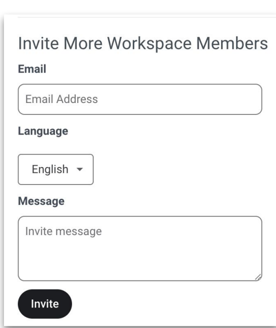
To change the Workspace Owner, click on the **Members** tab. Then click **Make Owner** to the right of the user. You can only designate one Workspace owner.

If you are the Workspace owner, you can click on **Remove Member** to remove a user from your Workspace.



If you have sent an invitation to join your Workspace, you will see those members under Pending Workspace Members. To cancel or expire the invitation, click on the "x" next to the date the invitation was sent.

To invite staff members to your Workspace, enter the staff member's email address and click Invite.



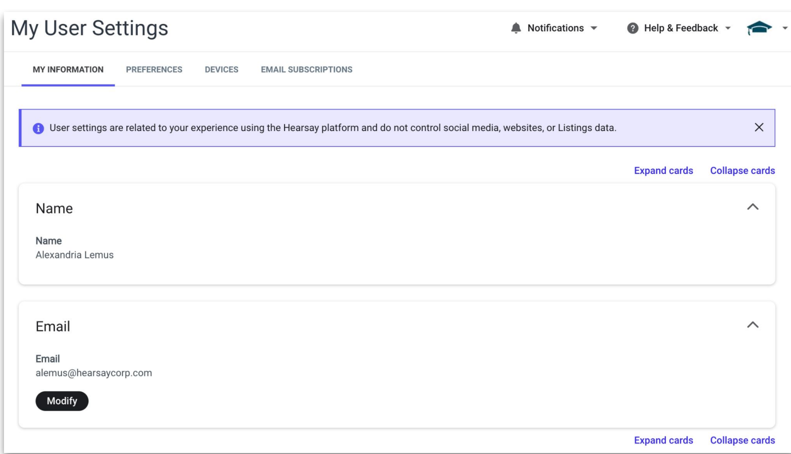
Depending on your organization's settings, when a staff member sends a text on your behalf, their first name and last initial (ex. Alexandria L.) may be added to the message. The assistant's name is pulled from the name for the user account associated with your workspace. This will show in texts sent to your clients, indicating to the client that a member of the workspace owner's staff has responded to the message. Check with your organization's administrators to see if team texting identification has been enabled. For more information on team texting, please review our help center article.

Note: By default, you are the owner of your Workspace.

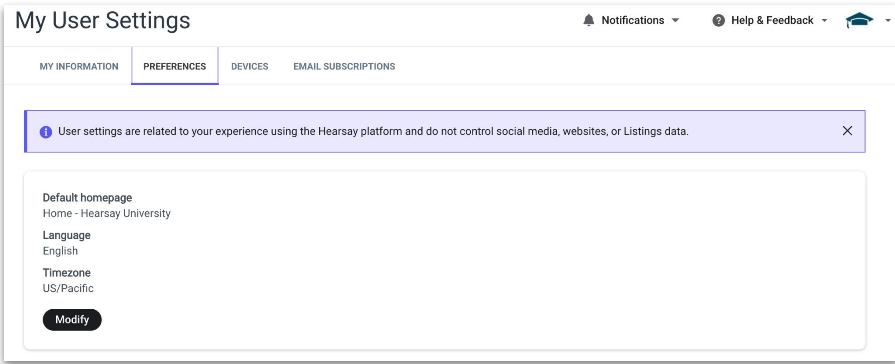
My User Settings

You can adjust your Yext Relate account to make the application work best for you by changing your User Settings. User settings can be found by clicking on **My User Settings** directly above Workspace Settings in the workspace icon dropdown menu.

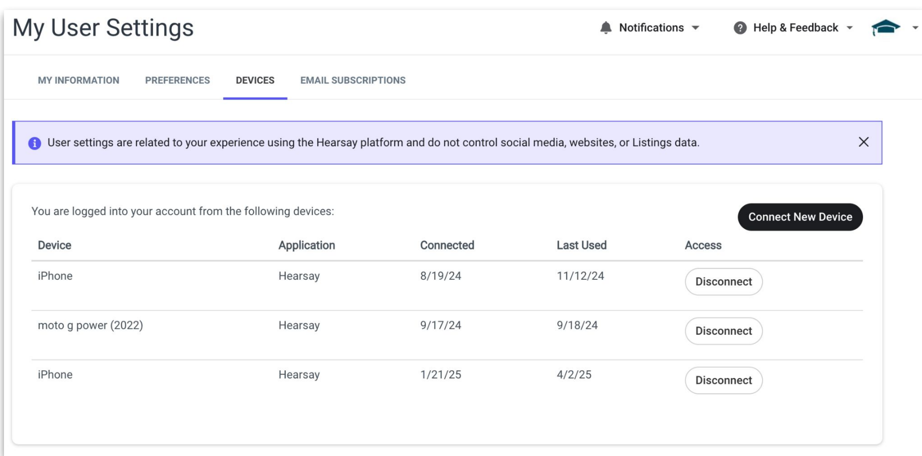
My Information is where you can view your name and view and edit your email address associated with your Yext account.



Preferences allows you to select the default homepage for your Yext platform. You can also update your language settings and your time zone.



Devices allows you to view all the mobile devices you've connected to your Yext account. You can disconnect any that are no longer in use. Depending on your organization's settings, you may have the ability to connect a new device using the **Connect New Device** process.



Email subscriptions allows you to select which emails you want to receive from the platform. The three most popular are: Unread Messages, Reminders Confirmation, and Relate Contacts Confirmation.