

FAQs for Partners leveraging Symphony Messaging in Embedded Mode

How do I know if my firm is a Symphony Messaging customer?

See how to [check if a Symphony Messaging instance is set up for your firm](#).

If I'm sponsored, will I be the administrator of the Symphony Messaging tenant?

No, via Sponsorship, you will not have administrative rights over the tenant. The tenant will be administered by Symphony. All the settings are automatically adjusted to provide the smoothest experience within your Partner platform.

How many users can my firm onboard for free?

With the Symphony sponsorship, you can onboard up to 10 users.

How long will Symphony Messaging be offered as part of the sponsorship?

With the Symphony sponsorship, you can leverage Symphony Messaging for a year without charge.

Who can I contact for more information about Symphony Messaging before using it?

Reach out to sales@symphony.com or fill out the [Symphony contact form](#).

If I'm sponsored, how do I export all of my chats for compliance archiving?

When requesting sponsorship to Symphony Messaging via the web form, Symphony will create a tenant for your firm and will automatically generate export files every day.

A compliance user for your firm can be appointed at the time of the sponsorship request or afterwards by emailing onboarding@symphony.com.

The compliance user needs to:

- Declare their authority to manage chat export files.
- Provide a public PGP encryption key so that Symphony cannot access the content of the exported files.
- Optionally, provide an RSA public key to secure access to the files on the Symphony FTP server.

Symphony will share the SFTP URL to the Compliance user. The Compliance user can then set up your archiving platform to retrieve the files and ingest the files.

Symphony does not provide archiving capabilities for Sponsored Access users, but can feed your own archiving platform.

If I'm sponsored, what if I want to restrict some functionality (such as external file sharing)?

All sponsored companies share the same configuration. Changing the configuration is exclusive to standard Symphony clients. If you feel strongly about a configuration change, reach out to Symphony at sales@symphony.com so that we can assess options.

How do I reset my password to access Symphony Messaging?

The password reset link is available on the login screen that pops up automatically when you open Symphony Messaging in your Partner platform, or when you click on the chat icon.

See [How to reset your Symphony Messaging password when SSO is not enabled](#).

How do I report a bug?

You can reach out to the Symphony Support team at support@symphony.com. Mention in the email that you are using Symphony Messaging within a Partner platform (e.g. DTCC CTM, Broadridge NyFix) and provide as much information as possible, including screenshots of the error.

How do I know who to reach out to for an exception?

Some Partner platforms such as DTCC CTM provide Symphony with the counterparty BIC(s) attached with an exception. This allows Symphony to leverage its Enhanced Directory and restrict the counterparty groups able to be searched to those that match the BIC codes.

By clicking in the **Search** field, you will be presented with a list of matching groups. You will need to pick the most relevant using the group description. The Product or Region of the groups proposed are likely to be the most decisive factors.

I don't see any counterparty group for my exception or trade, what should I do?

If you don't have any result when you look to add a counterparty, it can be due to several reasons:

- The counterparty has not granted you visibility to their group. See [Make counterparty groups discoverable](#).
- The counterparty does not have a Symphony Messaging group created for the BIC/BRMG code at hand.
- The counterparty is not on Symphony Messaging.

I am interested in a counterparty that is not on Symphony, how can I get them on Symphony?

You can reach out to sales@symphony.com or a known Symphony representative so that we can help establish the connection.

Can I add another group after the room is created?

Currently you are not able to add new groups after the chat room is created. However, it is possible to add individuals by clicking on the **Add member** link or icon from within the Symphony Messaging chat room.

Can I be notified when a new message is sent by the counterparty in the room?

Yes. The Partner platform will highlight via a colored badge on the chat icon linked to the exception when new messages that you have not read are sent in a room that you are a member of. The badge can also indicate the number of unread messages.

How can I access the full Symphony Messaging application?

You simply need to type your Symphony Messaging instance URL in a browser tab and log in using the username and password you have set up initially. The URL of your Symphony Messaging instance is available in the email that you have received to set up your password, or in the Symphony “Welcome Email” if you have not set up your password yet.

It is recommended that you bookmark that URL in your browser.

How can I be notified that a counterparty message is pending if I’m not on the Partner platform?

If you are not always on your Partner platform, you have the possibility to open Symphony Messaging in a standalone browser tab. The URL of your Symphony Messaging instance is available in the email that you have received to set up your password. It is recommended that you bookmark that URL in your browser.

From the full Symphony Messaging application, you will be able to be notified of all incoming messages in the various chat rooms you are part of. Please note that you will lose the structure and association to the exceptions that your Partner platform provides.

Can I see the full list of my chats in one go?

Using the full Symphony Messaging application in a separate browser tab, you can see the full list of your chats in one go.

Can I be automatically logged in to Symphony Messaging?

Currently, the login process between Symphony and Partner platforms is disjointed, meaning that you need to log in separately from Symphony Messaging and your Partner platform.

Once you log in to Symphony Messaging, a cookie is saved in your browser and remains active for a period of time so you do not have to log in again until it expires.

How do I control who can engage with my firm over Symphony?

You have two mechanisms to control which individual/firm has the ability to chat with you:

- As an individual user, you can use the connection requests to grant or remove access to chat with you. If you do not accept a connection request or you remove a previously accepted connection request for a counterparty, that counterparty will no longer be able to engage in a direct or in group chat with you.
- As a Group, you can use the visibility settings in order to determine which counterparty user or firm has the right to see your group in the search results on Symphony Messaging. If you have not provided visibility into your group, the user will not be able to select your Group to engage in a chat.

If I enable auto-accept connections, can I remove the connections I don't want?

Yes. In the full Symphony Messaging application, you can access the **Connections** panel on the navigation bar, go to the **Connected** section and search for the connections you want removed. Clicking on an entry opens the corresponding profile, where you can use the **Remove connection** link to remove the connection.

Can I remove rooms from my chat list when exceptions are fixed?

Currently you can only hide chat rooms that have been created by a counterparty. Hiding chats can be done either manually using the chat list, or automatically, after a certain time that can be set up in your user settings.

The other possibility to get an external chat removed from your chat list is to leave the room.

How can I better organize my chat rooms (for example, per counterparty)?

Currently, organizing chats in the navigation panel is manual. Folders can be created and chats placed under them using drag and drop. The folder structure is specific to an individual and cannot be shared or replicated automatically amongst colleagues.

How can I search for past exceptions chats?

The magnifying glass at the top of the navigation panel allows you to search for rooms or messages using text available in the room name or within a message (e.g. Master Reference).