



Embedded Relate for Salesforce Installation Guide

Last updated March 2025

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Overview

Embedded Relate for Salesforce allows users to compliantly send messages directly in Salesforce, simplifying their daily workflows.

Embedded Relate extends Salesforce's functionalities by providing the following features:

- Send and receive one-to-one text messages
- Send and receive attachments (photos, PDFs, and contact cards)
- Send texts using admin-created message templates
- Schedule to send messages at a particular time and date
- Integrate with your Salesforce contacts seamlessly
- Compliantly archive all sent and received messages
- Block sending messages that may contain inappropriate words and phrases
- Initiate texting capabilities only after permission has been granted to receive text messages

In July 2024, Embedded Relate upgraded to [Salesforce's Second-Generation Managed Package](#). This upgrade provides a more flexible approach to organizing and distributing Embedded Relate, ultimately leading to greater scalability and maintainability. Organizations looking to update to this newest version will need to uninstall their current Embedded Relate package and install the new version. While this one-time process involves uninstallation and reinstallation, it paves the way for smoother future updates. Once organizations complete this transition, subsequent upgrades will be more seamless, eliminating the need for further uninstallation and reinstallation cycles.



Configuration Settings

The following steps walk admins through the initial configuration settings for getting started with installing the newest version of Embedded Relate for Salesforce.

Pre-installation

If you are a new Embedded Relate customer, the Hearsay Professional Services team will consult with your organization so that we can better understand your Salesforce configuration and address any potential implementation issues.

Uninstall Older Version

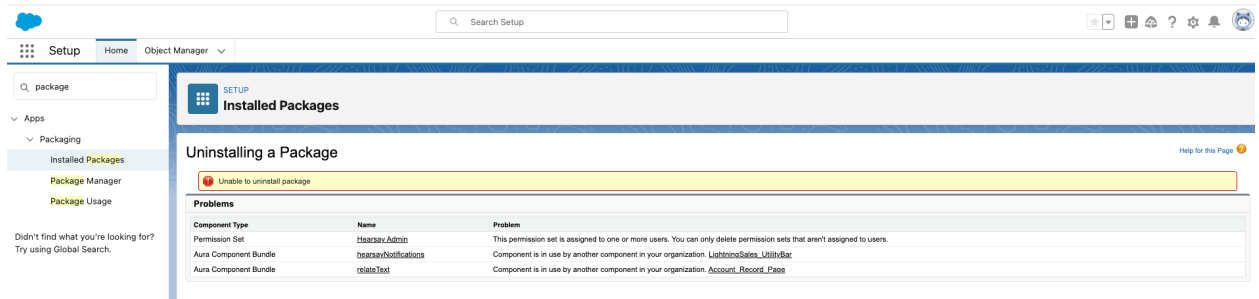
If you are an existing Embedded Relate customer on an older version of the managed package (before v.4.5), you will first have to uninstall your Embedded Relate package. This is a one-time requirement when updating to the newest version of Embedded Relate, which has upgraded to [Salesforce's Second-Generation Managed Package](#). While this process is cumbersome, it paves the way for smoother future updates, eliminating uninstall and reinstall cycles going forward.

To uninstall the package:

1. Go to **Setup** → **Installed Package**.
2. Click **Uninstall** for the **Hearsay Applications For Salesforce** item.
3. Select an option (Yes / No) for saving your package data for 48 hours after uninstallation. Saving your package data allows you to retain application settings made by admins.
4. Click **Uninstall** at the bottom of the page.

If any of the components are still in use during the uninstallation process, an error message will display showing a list of conflicts.

Error message showing a list of conflicts



The following components may need to be individually removed:

- Permission Sets** - To remove admin and user permission sets:
 - Go to **Setup** → **Permission Sets**
 - Select **Hearsay Admin**
 - Click **Manage Assignments** at the top of the page
 - Delete users from the Current Assignments table
 - Repeat this process for the **Hearsay User** permission set if applicable.
- Hearsay Relate widgets** - Please follow [Salesforce's instructions](#) to remove the Hearsay Relate widgets from the pages where they have been added (like the Home page, Contact pages, etc.).
- Hearsay Notifications utility bar** - To remove the notification bar:
 - Go to **Setup** → **App Manager**
 - In the App Manager table, locate the application where Hearsay Notifications has been added.
 - In the final column of the application row, click the inverted triangle icon for more options, then click **Edit**.
 - In the Lightning Builder's side menu, select **Utility Bar**, then click **Remove**.
 - Repeat the process for any other application that includes the Hearsay Notifications utility bar. You don't need to remove the utility bar from the Hearsay app because it will be automatically removed during the uninstallation process.

Learn more about deleting components of a managed package at [Salesforce Help](#).



Installing the Hearsay Relate for Salesforce Second-Generation Managed Package

After uninstalling older versions of the managed package (if needed), you are now ready to install the newest version of Embedded Relate. You will receive an installation link that takes you to the Hearsay for Salesforce package.

Choose an installation option

The Embedded Relate installation link will take you to a page with 3 installation options:

- Install for admins only
- Install for all users
- Install for specific profiles

Learn more about [installing managed packages](#) and [managing permission sets](#) at Salesforce Help.

Approve Third-Party Access

After selecting an installation option, use the default selection for third party access. Check the box to grant access and click **Continue**. The installation will now begin and it may take some time. The administrator will receive an email notification once the installation has been completed.



Approve Third-Party Access

This package may send or receive data from third-party websites. Make sure you trust these websites. [What if you are unsure?](#)

CSP Trusted Site

https://*.hearsaysocial.com

https://*.pusher.com

wss://*.pusher.com

Website

SSL Encrypted

api.hearsaysocial.com



api.hearsaysocial.com



hsl-pnw-downloadable-files.s3.amazonaws.com



integration-mcint.prod.hearsayplatform.com



login.hearsaysocial.com



my.hearsaysocial.com



sentry.io



sentry.io



www.apexdevnet.com



Yes, grant access to these third-party web sites

Continue

Cancel

Approve Third-Party Access

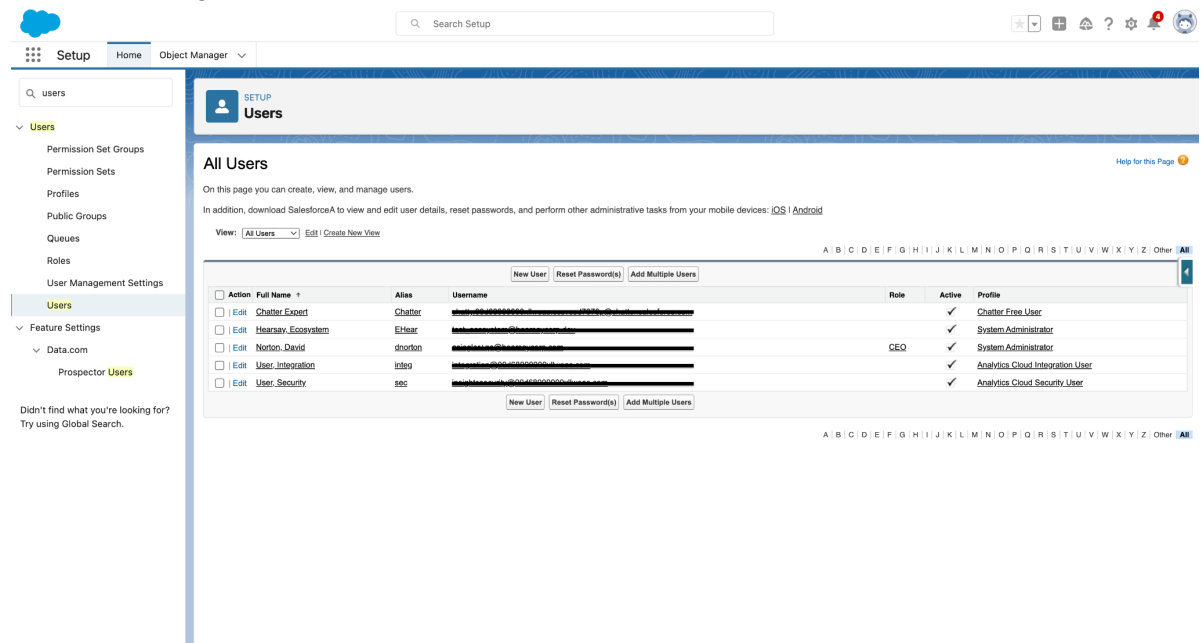
Assign the Hearsay Admin permission set

Assign the **Hearsay Admin** permission set to System Administrator types of users, which grants admin access to Embedded Relate to define mappings and enable the integration.

- To assign the Hearsay Admin permission set to an individual Salesforce user:



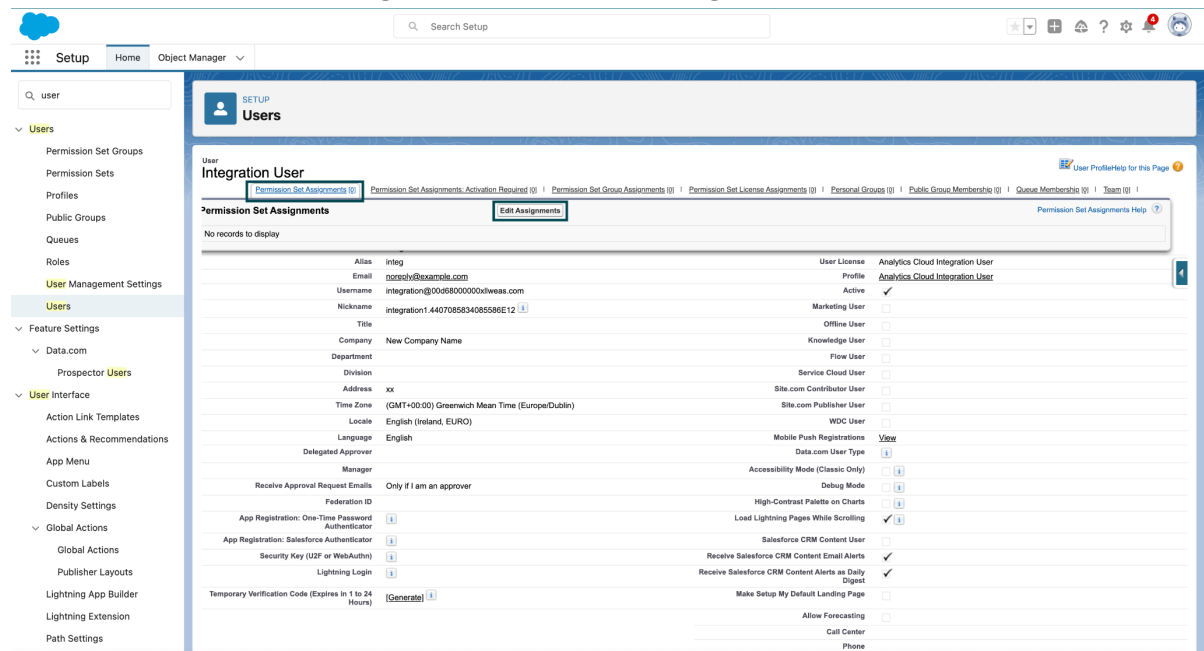
1. In Salesforce, go to **Setup** → **Users**



The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'users' entered. The 'Users' section is expanded, showing options like 'Permission Set Groups', 'Permission Sets', 'Profiles', 'Public Groups', 'Queues', 'Roles', and 'User Management Settings'. The main content area is titled 'All Users' and includes a description: 'On this page you can create, view, and manage users. In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: iOS | Android'. Below this is a table of users with columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The table lists five users: Chatter Expert, Hearsay_Ecosystem, Norton_David, User_Integration, and User_Security. The 'User_Integration' user is highlighted.

2. Select desired User

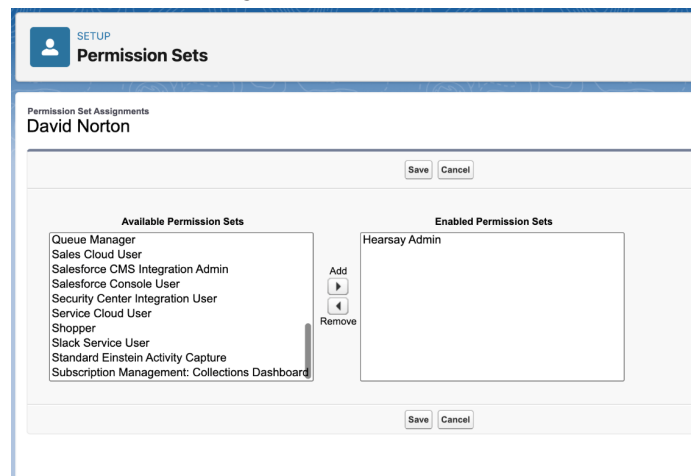
3. Under **Permission Set Assignments**, click **Edit Assignments**



The screenshot shows the Salesforce Setup interface for a specific user, 'Integration User'. The left sidebar has a search bar with 'user' entered. The 'Users' section is expanded, and the 'Integration User' is selected. The main content area is titled 'Integration User' and includes a description: 'User Profile: Analytics Cloud Integration User'. Below this is a table of 'Permission Set Assignments' with columns for Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, Locale, Language, Delegated Approver, Manager, Receive Approval Request Emails, Federation ID, App Registration: One-Time Password Authenticator, App Registration: Salesforce Authenticator, Security Key (U2F or WebAuthn), Lightning Login, Temporary Verification Code (Expires in 1 to 24 Hours), User License, Profile, Active, Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Mobile Push Registrations, Data.com User Type, Accessibility Mode (Classic Only), Debug Mode, High-Contrast Palette on Charts, Load Lightning Pages White Scrolling, Salesforce CRM Content User, Receive Salesforce CRM Content Email Alerts, Receive Salesforce CRM Content Alerts as Daily Digest, Make Setup My Default Landing Page, Allow Forecasting, Call Center, and Phone. The 'Integration User' is highlighted.



4. Select the **Hearsay Admin** permission set from the left box



5. Click the **Add** arrow to move it to the right box
6. Click **Save**

- To assign the Hearsay Admin permission set to multiple Salesforce users:

1. Go to **Setup** → **Permission Sets**
2. Find the **Hearsay Admin** permission set and click on it
3. Click **Manage Assignments**
4. Click **Add Assignment**
5. Find and select all users you'd like to assign the permission to.
6. Click **Next**
7. Select an expiration date, if desired
8. Click **Assign**

Assign the Hearsay Users permission set

Assign the **Hearsay Users** permission set to any End Users, such as advisors or agents, who will be using the Embedded Relate texting widget.

- To assign the Hear Users permission set to an individual user:



1. Go to **Setup** → **Users**

Setup Users

All Users

On this page you can create, view, and manage users.

In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: [iOS](#) | [Android](#)

View: [All Users](#) | [Edit](#) | [Create New User](#)

Action	Full Name	Alias	Username	Role	Active	Profile
☐ Edit	Chatter Expert	Chatter	chatterexpert@hearsay.com		✓	Chatter Free User
☐ Edit	Hearsay_Ecosystem	Elhear	elhear@hearsay.com		✓	System Administrator
☐ Edit	Norton_David	dnorton	dnorton@hearsay.com	CEQ	✓	System Administrator
☐ Edit	User_Integration	integ	integration@00456000000shweas.com		✓	Analytics Cloud Integration User
☐ Edit	User_Security	sec	security@00456000000shweas.com		✓	Analytics Cloud Security User

2. Select desired User

3. Under **Permission Set Assignments**, click **Edit Assignments**

Setup Users

User Integration User

[Permission Set Assignments](#) | [Permission Set Assignments: Activation Required](#) | [Permission Set Group Assignments](#) | [Permission Set License Assignments](#) | [Personal Groups](#) | [Public Group Membership](#) | [Queue Membership](#) | [Team](#)

[Edit Assignments](#)

No records to display

Alias	integ	User License	Analytics Cloud Integration User
Email	integration@00456000000shweas.com	Profile	Analytics Cloud Integration User
Username	integration@00456000000shweas.com	Active	✓
Nickname	integration1.4407085834085586E12	Marketing User	☐
Title		Offline User	☐
Company	New Company Name	Knowledge User	☐
Department		Flow User	☐
Division		Service Cloud User	☐
Address	xx	Site.com Contributor User	☐
Time Zone	(GMT+00:00) Greenwich Mean Time (Europe/Dublin)	Site.com Publisher User	☐
Locale	English (Ireland, EURO)	WDC User	☐
Language	English	Mobile Push Registrations	☐
Delegated Approver		Data.com User Type	View
Manager		Accessibility Mode (Classic Only)	☐ x
Receive Approval Request Emails	Only if I am an approver	Debug Mode	☐ x
Federation ID		High-Contrast Palette on Charts	☐ x
App Registration: One-Time Password Authenticator	x	Load Lightning Pages White Scrolling	☒ x
App Registration: Salesforce Authenticator	x	Salesforce CRM Content User	☐
Security Key (U2F or WebAuthn)	x	Receive Salesforce CRM Content Email Alerts	✓
Lightning Login	x	Receive Salesforce CRM Content Alerts as Daily Digest	✓
Temporary Verification Code (Expires in 1 to 24 Hours)	Generate x	Make Setup My Default Landing Page	☐
		Allow Forecasting	☐
		Call Center	☐
		Phone	☐

4. Select the **Hearsay Users** permission set from the left box

5. Click the **Add** arrow to move it to the right box

6. Click **Save**

- To assign the Hearsay Users permission set to multiple users:

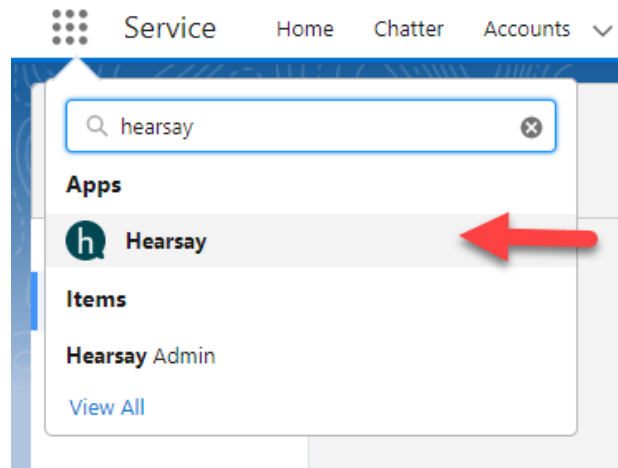


1. Go to **Setup** → **Permission Sets**
2. Find the **Hearsay Users** permission set and click on it
3. Click **Manage Assignments**
4. Click **Add Assignment**
5. Find and select all users you'd like to assign the permission to.
6. Click **Next**
7. Select an expiration date, if desired
8. Click **Assign**

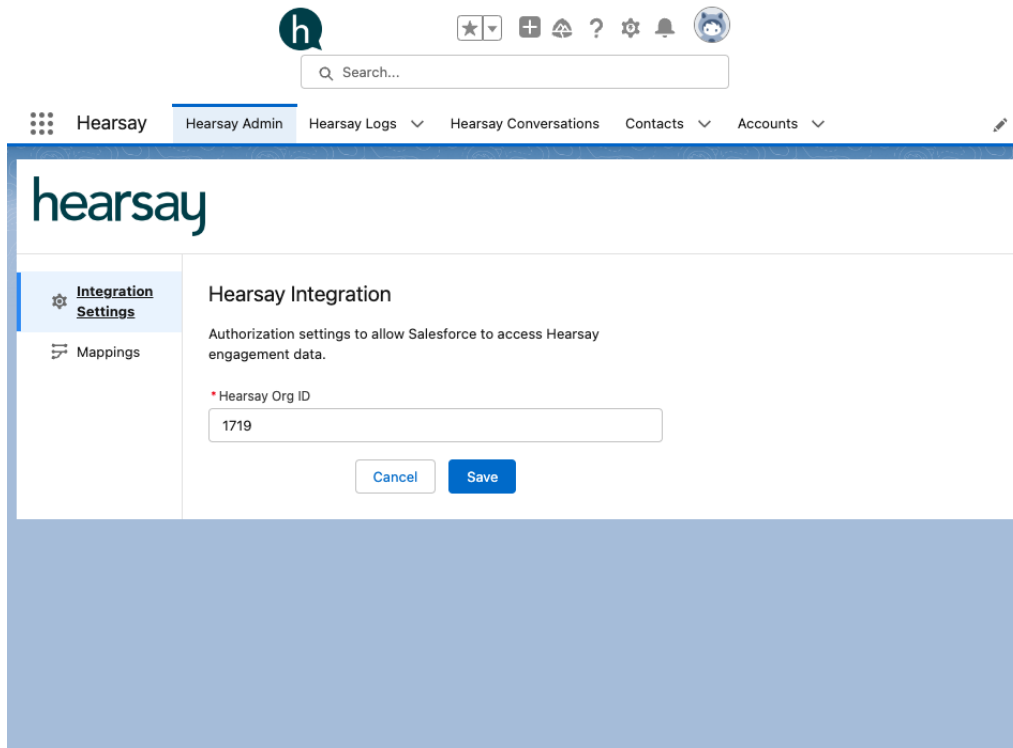
Authorize Salesforce to access Hearsay engagement data

Follow these steps to connect Hearsay and Salesforce orgs and share data between them:

1. Open the **Hearsay** app from the Salesforce AppLauncher.



2. Select **Hearsay Admin** in the top menu.
3. Click **Integration Settings** in the left-hand menu.



4. Add/update/view your Hearsay Org ID and click **Save**.

NOTE: Your Hearsay Org ID will be provided to you during deployment. Changing your Hearsay Org ID might cause functional issues in the application, so please consult Hearsay before making any changes.

Enable the Hearsay Embedded Relate widget

Follow these steps to enable the Hearsay Embedded Relate widget:

1. Open the **Hearsay** app from the Salesforce AppLauncher
2. Click on the **Mappings** tab in the left-hand navigation
3. Enable Hearsay Embedded Relate toggle.

The screenshot shows the Hearsay Admin interface. At the top, there's a navigation bar with the Hearsay logo, a search bar, and menu items: Hearsay, Hearsay Admin, Hearsay Logs, Hearsay Conversations, Contacts, and Accounts. Below this is a sidebar with 'Settings' and 'Mappings' (selected). The main content area is titled 'hearsay' and contains three sections: 'Force a User to Log Out' with a text input for email and a 'Log User Out' button; 'Enable Hearsay Embedded Relate' with a toggle switch set to 'Enabled'; and 'Object Mapping' with an 'Add New Mapping' button. Below the button, 'Current Mappings' are listed: 'Object: Contact (Contact)' with 'Field: Mobile Phone (MobilePhone)' and 'Object: Lead (Lead)' with 'Field: Mobile Phone (MobilePhone)'. Each mapping has 'Edit' and 'Delete' buttons.

Map the Object and Phone fields

After enabling the widget, you will need to map the Object and Phone fields so that Embedded Relate can integrate with contact types and phone numbers. Optionally, admins can also map the Firstname and Lastname fields, enabling users to better distinguish between contacts. To map the Object, Phone, Firstname, and Lastname fields:

1. Open the **Hearsay** app from the Salesforce AppLauncher
2. Click on the **Mappings** tab in the left-hand navigation
3. Click **Add New Mapping** under **Object Mapping**
4. Start typing the **Object** name (Account, Contact, Lead, etc.) or the **Phone Field** name in the appropriate section to search.
5. Click **Save**.

6. Confirm all the Objects that should work with the texting widget under **Current Mappings**.



Update Page Layout(s)

Now that you have enabled Hearsay Embedded Relate, you can make the widget visible on Object Record Pages that have first name, last name, and phone number fields. The following steps cover updating the page layout of Object Record Pages to display the Hearsay Embedded Relate texting widget.

1. Open the Object Record Page you want to edit, or create a new Record if there are none.
2. In the upper-right corner, click the setup gear icon.
3. Click **Edit Page**.
4. Search and find the **Hearsay Relate Text** custom component from the **Components** bar on the left. The Hearsay Relate Text custom component only appears if the Object Record Page has first name, last name, and phone number fields.
5. Drag the Hearsay Relate Text custom component from the Components bar onto the page. Make sure that the custom component is placed directly on the page, and not inside a tab, accordion, another component, widget, or customized section. The page layout bar on the top-right of the screen should say **Page > Hearsay Relate Text** when properly placed.

Successfully placed Hearsay Relate Text custom component

The screenshot displays the Lightning App Builder interface. On the left, the 'Components' sidebar shows a search bar and a list of components, including 'Hearsay Relate Text' under the 'Custom' section. The main canvas shows a 'Contact Record Page' for 'TED LASSO'. The page layout bar at the top right indicates 'Page > Hearsay Relate Text'. A callout box points to this bar with the text: 'Page layout column correctly indicates Page > Hearsay Relate Text'. The page content shows a contact record with fields for Title, Account Name, Phone, Email, and Contact Owner. Below these fields, there are sections for 'Related' (Opportunities, Cases, Campaign History, Notes & Attachments) and a 'Details' section. The 'Hearsay Relate Text' custom component is visible on the right side of the page.

6. On the top right, click **Save**.

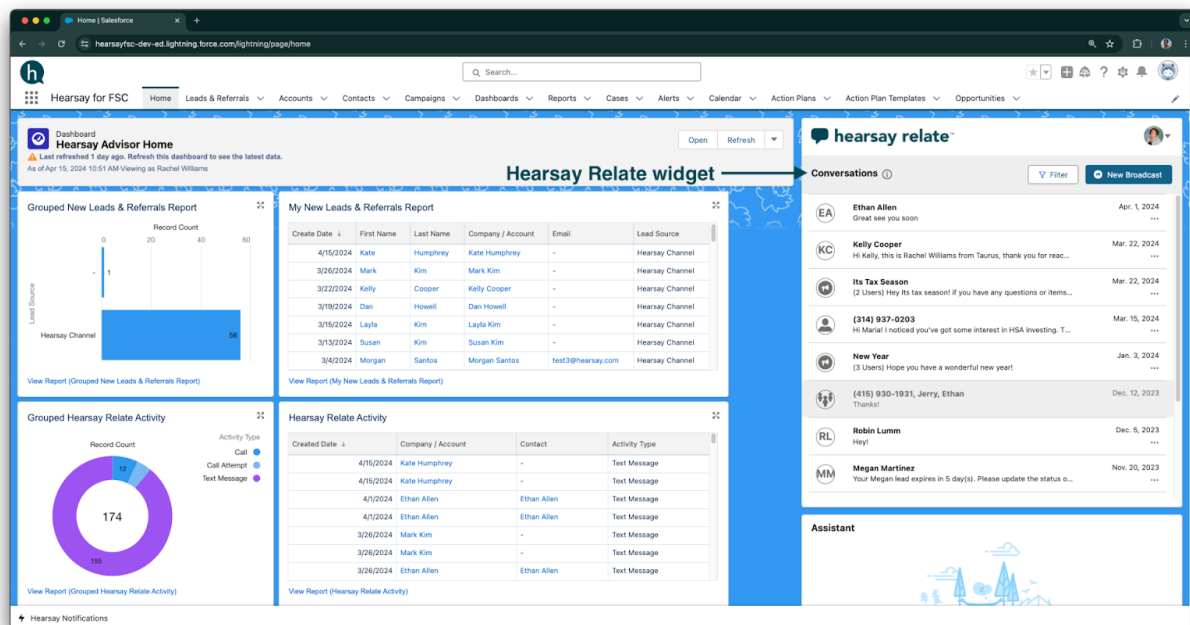


7. In the popup, click **Activate**.
8. Repeat for each Object Record Page where you'd like to include the Hearsay Embedded Relate texting widget.

You can also use these steps to add the **Hearsay Conversations** widget. The Hearsay Conversations widget acts as the central hub for viewing and filtering all texts in one place, making it easier to reach out to contacts and manage ongoing conversations. The Hearsay Conversations widget has the following features:

- View the conversation type (one-on-one or group text), contact name or phone number, date of last message, and a message preview for all your conversations.
- Click on a conversation to send a text and read your message history.
- Filter conversations by unread messages, unanswered messages, attestation status (opted-in, needs opt-in, pending opt-in, opted-out), hidden conversations, spam, and Broadcast Messages.
- Mark conversations as spam and remove junk messages.
- Hide conversations from view. Hidden conversations can be unhidden manually, and are automatically unhidden if you receive a new text.
- Send a Broadcast Message, allowing you to send the same message to several contacts at once. [Learn more about Broadcast Messages.](#)

Hearsay Relate Conversations widget





Add the Hearsay Conversations Utility Bar

The Hearsay Conversations Utility Bar component provides real-time alerts when new messages arrive, enabling users to respond promptly, filter through their messages, and navigate their ongoing conversations.

The Hearsay Conversations Utility Bar component can be added to any Lightning App within Salesforce by following these steps:

1. In Salesforce's Setup, go to the **App Manager**
2. Click the **Edit** drop down icon (the downward triangle) in the final column for the Lightning App where you'd like to add the Conversations utility custom component
3. Click **Utility Items**, then **Add Utility Item**
4. Select the **Hearsay Conversations** custom component
5. Input these recommended settings:
 - a. **Label:** Hearsay Conversations
 - b. **Icon:** notification
 - c. **Panel Width:** 700
 - d. **Panel Height:** 710
 - e. **Start automatically:** checked
6. Click **Save**

NOTE:

- This component is added by default to the Hearsay app for users with the Hearsay Admin permission set.
- If you decide to disable the Embedded Related Widget from the Admin screen, remember to remove the utility bar component from page layouts as well, otherwise users will continue to receive notifications regardless of the disablement of the widget.

Hearsay Conversations in the Salesforce Utility Bar showing an unread message alert



Search...

Hearsay

Hearsay Admin

Hearsay Conversations

Contacts ▾

Accounts ▾

Contacts

My Contacts ▾

Total Contacts

3

No Activity ⓘ

3

Idle ⓘ

0

No Upcoming ⓘ

0

Overdue

0

Due Today

0

Upcoming ⓘ

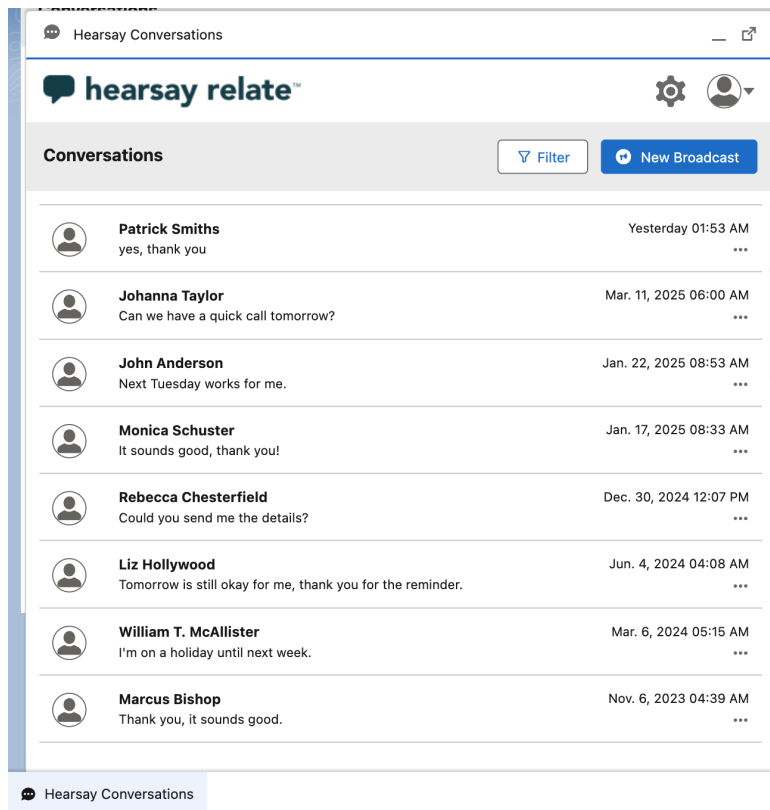
0

3 items • Filtered by Created Date, Me, Total Contacts

☐	Name ▾		Title ▾	Account Name
1	☐ Greta Gadbois			Gadbois
2	☐ Shane Gerrity			Gerrity
3	☐ Michael McLean			McLean

Hearsay Conversations (1)

Expanded view of Hearsay Conversations in the Salesforce Utility Bar



Salesforce Instance Custom Fields Prerequisites

The following settings should be validated by the Salesforce System Administrator after installation:

- Hearsay Users Permission Set users must also have permission to update the following custom fields on the User object. These fields store User preferences and Hearsay identification values for each user:
 - Dismissed_Group_Message__c
 - Enter_To_Send__c
 - Hearsay_Asset_Name__c
 - Hearsay_Relate_Account_ID__c
 - Hearsay_Salesforce_Asset_ID__c
 - Hearsay_User_Group_ID__c
 - Hearsay_User_ID__c
 - Hearsay_user_Ref_ID__c



- Hearsay Users Permission Set users should also have access to the following Custom Setting objects. To access these settings go to Setup → Custom Settings:
 - HearsayCo__HearsayTextSetting__c : Stores Hearsay phone field mappings
 - HearsayCo__UserCredential__c : Is a protected variable to store Hearsay Credentials
 - HearsayCo__UserToken__c

NOTE: Credential fields are not accessible nor visible by design outside the package.

- Hearsay Admin Permission Set users should have access to the following Custom Metadata Types. To access these settings go to Setup → Custom Metadata Types:
 - HearsayCo__Hearsay_API_Setup__mdt
 - HearsayCo__Log_Settings__mdt

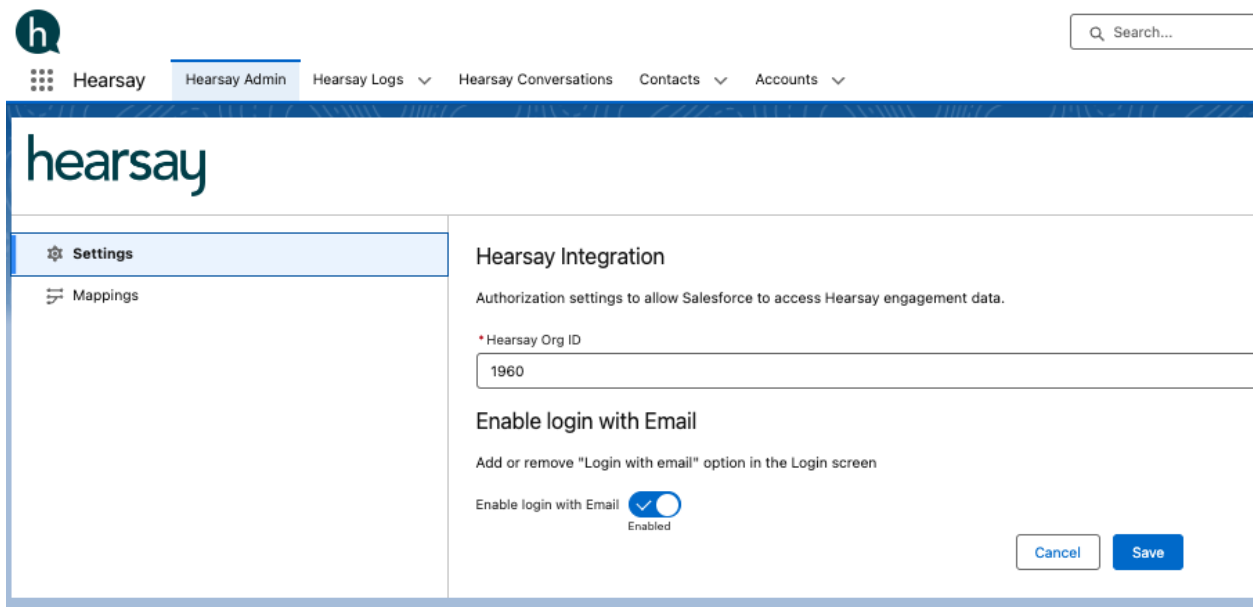
Set Login Method for Individual Users

You can configure 2 login methods for users:

1. Only login with Company Credentials (SSO)
2. Login with Company Credentials (SSO) or with email associated with Hearsay account.

Admins can choose one of these logins methods by:

1. Go to **Hearsay Admin** in Salesforce
2. Select **Settings** in the side menu
3. Switch the toggle for **Enable Login with Email**. If turned on, users will be able to Login with Company Credentials (SSO) or with their email associated with their Hearsay account. If turned off, only logging in with Company Credentials (SSO) will be available.



Optional Disable Salesforce Record Creation

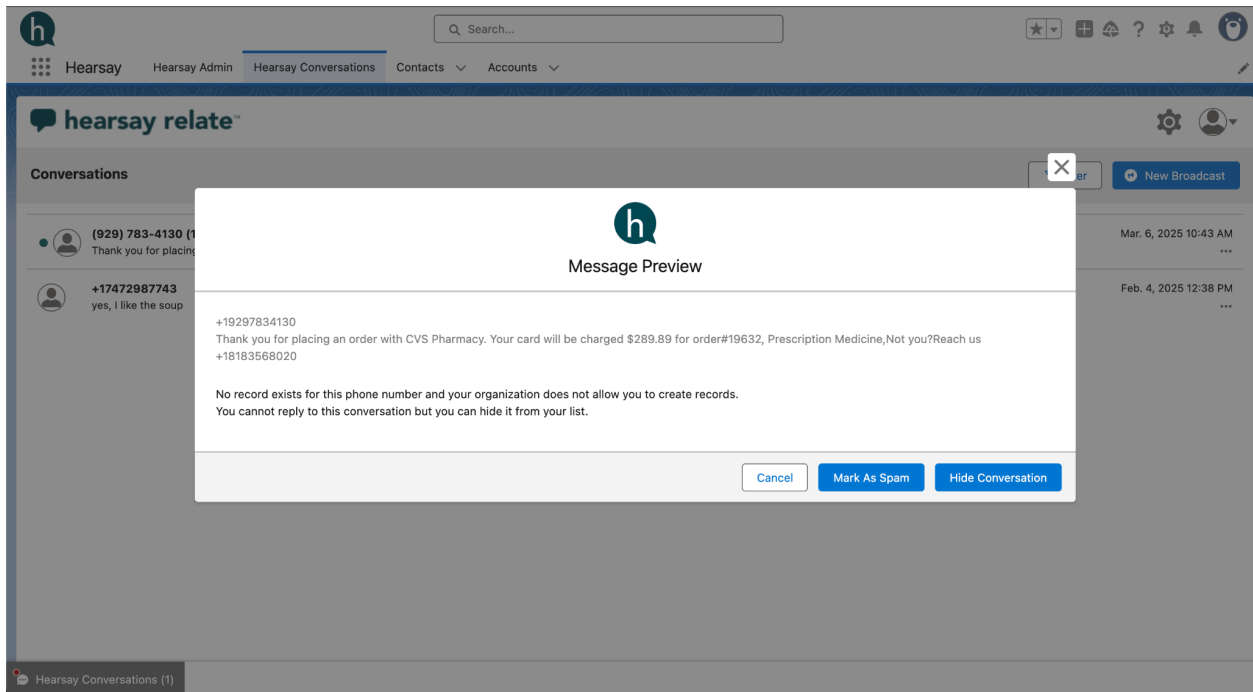
Admins can also prevent users from creating new Salesforce records through Embedded Relate's Conversation widget. When Salesforce record creation in Embedded Relate is disabled, this restriction:

- Blocks responses to messages from phone numbers not associated with existing Salesforce records
- Shows users a message preview from unassociated numbers, but only allows them to mark as spam or hide the conversation
- Only applies to the Hearsay Conversations widget and doesn't affect record creation in non-Hearsay Salesforce interfaces or Hearsay Web/Mobile

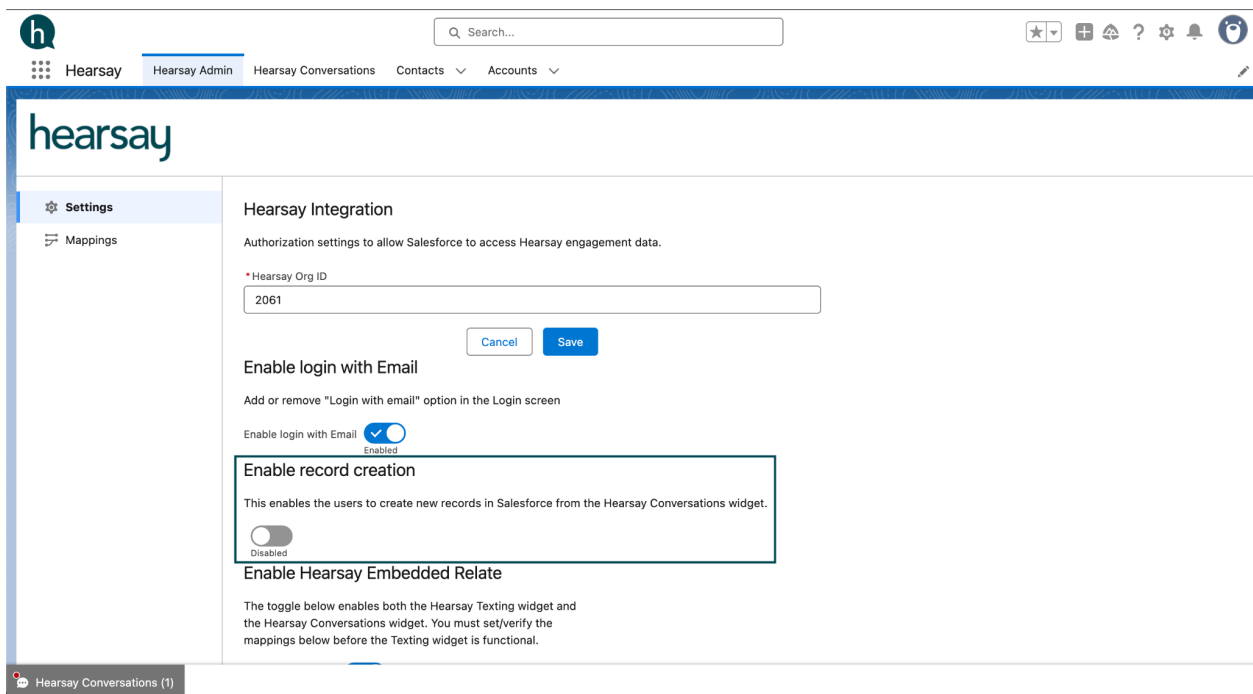
By default, Salesforce record creation in Embedded Relate is *enabled*. To disable Salesforce Record Creation:

1. Go to **Hearsay Admin** in Salesforce
2. Select **Settings** in the side menu
3. Switch the toggle for **Enable record creation**.

Preview for message received from unassociated number. Note that Salesforce record creation is disabled.



Admin setting for changing Salesforce record creation permission



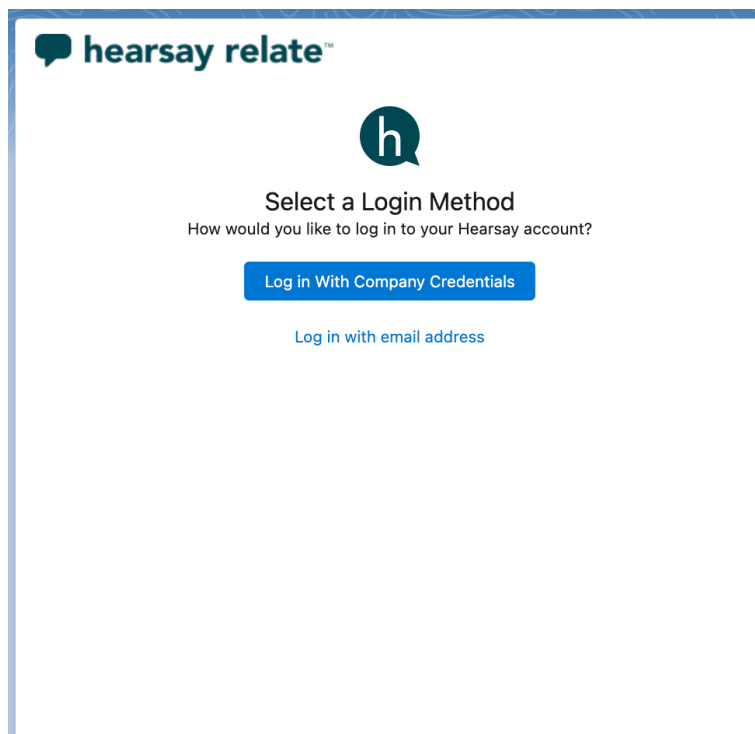


Instruct Individual Users to Authorize their Account

After a login method has been selected, each user will need to individually login to the Embedded Relate widget in Salesforce to complete the authentication process. **Depending on the method selected, users can login using their Company Credentials (SSO) or through their email associated with their Hearsay account.**

Logging in with Company Credentials (SSO)

To set up SSO login, you will need to share your organization's Salesforce domain address with Hearsay. Once enabled, users will be redirected to their SSO login flow when they select **Log in with Company Credentials** in the Embedded Relate widget in Salesforce.

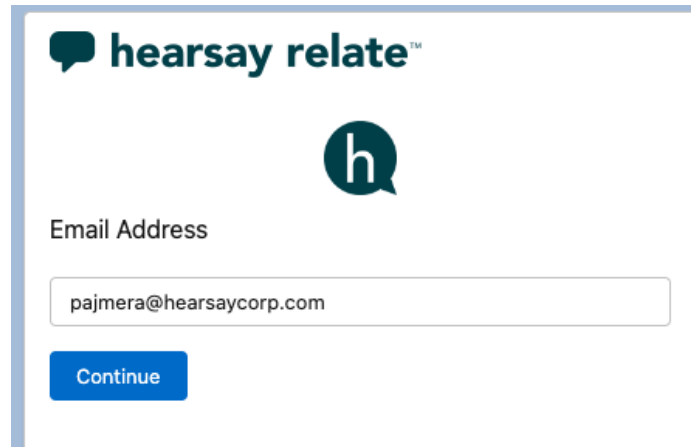


Logging in with a Hearsay-associated email address

1. Log into Salesforce

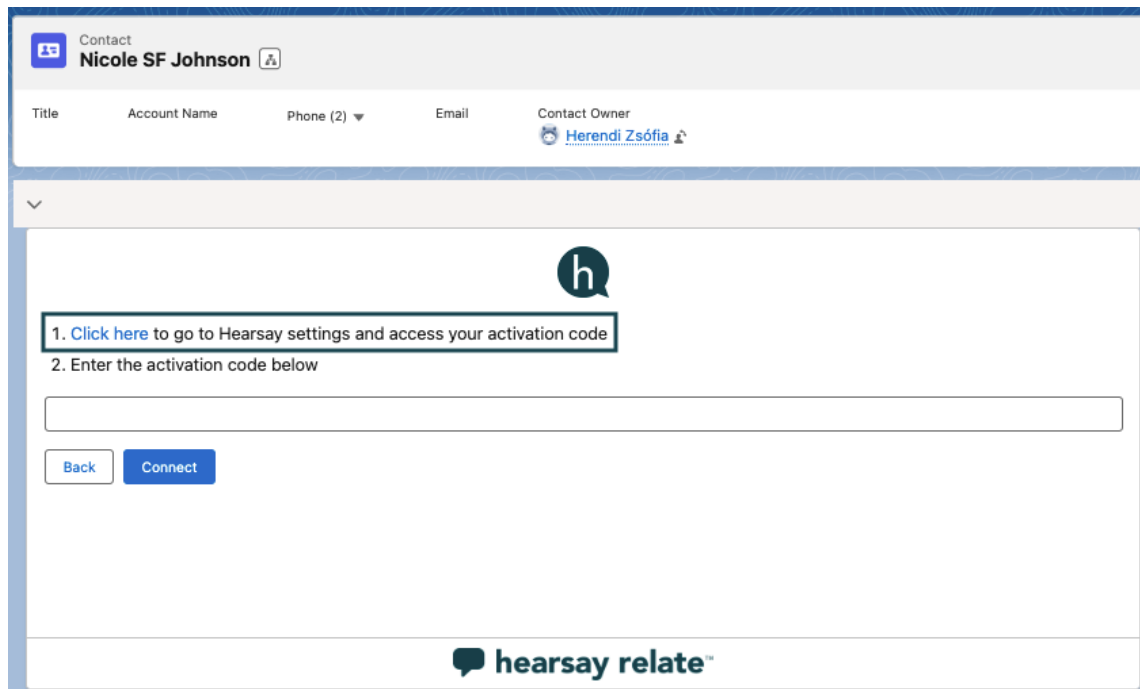
hearsay

2. Open any object record page (such as a Contact page or the Salesforce Home page) where the Hearsay Embedded Relate widget has been added.
3. Select **Log in with email address**
4. In the Embedded Relate widget, enter the email address associated with your Hearsay account.



The screenshot shows a login widget titled "hearsay relate™". It features a circular logo with a lowercase 'h' inside a speech bubble. Below the logo, the text "Email Address" is followed by a text input field containing the email address "pajmera@hearsaycorp.com". A blue "Continue" button is positioned below the input field.

5. Click **Continue**
6. Click on the link in the widget to access your Hearsay activation code. You may need to login to your Hearsay account, if you aren't already logged in.



The screenshot displays a Salesforce Contact record for "Nicole SF Johnson". The page includes a header with the contact's name and a table with columns: Title, Account Name, Phone (2), Email, and Contact Owner. The Contact Owner is listed as "Herendi Zsófia". Below the table, the Hearsay relate widget is embedded. It features the Hearsay logo and a list of instructions: "1. Click here to go to Hearsay settings and access your activation code" (with a link) and "2. Enter the activation code below". A text input field for the activation code is provided, along with "Back" and "Connect" buttons. The widget is branded with "hearsay relate™" at the bottom.



- Copy the activation code from the Hearsay Desktop settings page.

- Paste the Hearsay activation code in the Embedded Relate widget in Salesforce and click **Connect**.



Error Logging

View Error Logs

Errors for Embedded Relate are tracked as records on the Hearsay Log custom object. To view any error logs that are created in association with the Hearsay managed package, follow the steps below:

1. Click the **AppLauncher**
2. Type and click **Hearsay Logs**
3. See error log records
 - a. Below are some examples of error records:

Log Number	User	Class Name	Level	Message	Created Date
LOG-0001395	Robert Hendersson	HearsayAPIService	ERROR	User token is no longer valid	12/5/2022, 1:34 PM
LOG-0001394	Robert Hendersson	HearsayAPIService	WARN	This message contains keyword(s) and/or symbols that do not adhere...	12/1/2022, 2:40 PM
LOG-0001393	Robert Hendersson	HearsayAPIService	WARN	This message contains keyword(s) and/or symbols that do not adhere...	12/1/2022, 2:40 PM
LOG-0001392	Robert Hendersson	HearsayAPIService	ERROR	The connection to Hearsay failed. Contact your admin.	12/1/2022, 2:38 PM
LOG-0001391	Robert Hendersson	HearsayAPIService	ERROR	The connection to Hearsay failed. Contact your admin.	12/1/2022, 2:37 PM
LOG-0001390	Robert Hendersson	HearsayAPIService	ERROR	The connection to Hearsay failed. Contact your admin.	12/1/2022, 2:36 PM
LOG-0001389	Robert Hendersson	HearsayAPIService	ERROR	The connection to Hearsay failed. Contact your admin.	12/1/2022, 2:35 PM
LOG-0001388	Robert Hendersson	HearsayAPIService	ERROR	The connection to Hearsay failed. Contact your admin.	12/1/2022, 2:34 PM
LOG-0001387	Robert Hendersson	HearsayAPIService	ERROR	The connection to Hearsay failed. Contact your admin.	12/1/2022, 2:33 PM
LOG-0001386	Robert Hendersson	HearsayAPIService	ERROR	The connection to Hearsay failed. Contact your admin.	12/1/2022, 2:32 PM
LOG-0001385	Robert Hendersson	HearsayAPIService	ERROR	The connection to Hearsay failed. Contact your admin.	12/1/2022, 2:31 PM
LOG-0001384	Robert Hendersson	HearsayAPIService	ERROR	The connection to Hearsay failed. Contact your admin.	12/1/2022, 2:30 PM
LOG-0001383	Robert Hendersson	HearsayAPIService	ERROR	The connection to Hearsay failed. Contact your admin.	12/1/2022, 2:29 PM
LOG-0001382	Robert Hendersson	HearsayAPIService	ERROR	The connection to Hearsay failed. Contact your admin.	12/1/2022, 2:28 PM
LOG-0001381	Robert Hendersson	HearsayAPIService	ERROR	The connection to Hearsay failed. Contact your admin.	12/1/2022, 2:27 PM
LOG-0001380	Robert Hendersson	HearsayAPIService	ERROR	The connection to Hearsay failed. Contact your admin.	12/1/2022, 2:26 PM
LOG-0001379	Robert Hendersson	HearsayAPIService	ERROR	The connection to Hearsay failed. Contact your admin.	12/1/2022, 2:25 PM
LOG-0001378	Robert Hendersson	HearsayAPIService	ERROR	The connection to Hearsay failed. Contact your admin.	12/1/2022, 2:24 PM
LOG-0001377	Robert Hendersson	HearsayAPIService	ERROR	The connection to Hearsay failed. Contact your admin.	12/1/2022, 2:23 PM
LOG-0001376	Robert Hendersson	HearsayAPIService	ERROR	The connection to Hearsay failed. Contact your admin.	12/1/2022, 2:22 PM
LOG-0001375	Robert Hendersson	HearsayAPIService	ERROR	The connection to Hearsay failed. Contact your admin.	12/1/2022, 2:21 PM
LOG-0001374	Robert Hendersson	HearsayAPIService	ERROR	The connection to Hearsay failed. Contact your admin.	12/1/2022, 2:20 PM

hearsay



Hearsay Log
LOG-0001431

Related

Details

Log Number

LOG-0001431

Class Name

HearsayRelateTextCtrl

Level

ERROR

User

[Adam Siegler](#)

Object Name

Object IDs

▼ Messages

Message

Upsert failed. First exception on row 3; first error: REQUIRED_FIELD_MISSING, Required fields are missing: [Name]: [Name]



Hearsay Log
LOG-0001461

Related

Details

Log Number

LOG-0001461

Class Name

HearsayNotificationsCtrl

Level

ERROR

User

[Adam Siegler](#)

Object Name

Object IDs

▼ Messages

Message

entity type ContactCleanInfo does not support search

Schedule Purge Logs Job

To schedule automatic deletion of the Hearsay Logs, follow the steps below. We recommend doing this to conserve data storage.

1. Go to **Setup** → **Custom Code** → **Apex Classes**
2. Click **Schedule Apex** button



3. Enter a name for the job into the field called **Job Name**
4. Select **LogPruneSchedulable** for **Apex Class**
5. Set the **Schedule Apex Execution** as desired

NOTE: The email address of the running user may require email verification on the first run. If so, an email with the subject **Salesforce email verification** will be received with a link to verify the email address for the Salesforce org

https://help.salesforce.com/s/articleView?id=release-notes.rn_sales_productivity_email_verification.htm&type=5&release=236

Troubleshooting Apex Class Errors

Depending on the organization's Salesforce Apex classes configurations, an error message may appear that says, "Error! Please contact your Salesforce Admin. You don't have access to the Apex class <class name>". This error typically shows up when the user or the user profile type does not have permission to access the Apex classes included in the Hearsay managed package. To check or change a user or user profile type's Apex class permissions, go to **Setup** → **Profiles** → <Select profile type the user has> → **Enabled Apex Class Access**. Embedded Relate requires permissions for the following Apex classes:

- CSUtils
- HearsayAPI
- HearsayAPICalloutHelper
- HearsayAPIService
- HearsayAPIWrapper
- HearsayActivityClass
- HearsayAddAttachmentCtrl
- HearsayApiSetupMsg
- HearsayBroadcastWrapper
- HearsayConfigMsg
- HearsayContactDetailsMsg
- HearsayConversationData
- HearsayConversationResponseMsg
- HearsayConversationV4Msg
- HearsayConversationWrapper
- HearsayConversationsController
- HearsayConversationsService
- HearsayCreateObjectWrapper
- HearsayDataMsg
- HearsayDebugLogger

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- HearsayDeleteUserCredentialJob
- HearsayDemoPostInstallationScript
- HearsayEndpointWrapper
- HearsayFileCredentialMsg
- HearsayFileCredentialResponseMsg
- HearsayFileUploadResultWrapper
- HearsayFileWrapper
- HearsayFilesService
- HearsayInitialConversationsWrapper
- HearsayLeadManagementWrapper
- HearsayLoginResponseMsg
- HearsayLoginTokenMsg
- HearsayLoginTokenResponseMsg
- HearsayLoginTokenResponseWrapper
- HearsayMessage
- HearsayMessageAndAttestationWrapper
- HearsayMessageRequestMsg
- HearsayMessageResponseMsg
- HearsayMetaMsg
- HearsayMetadataService
- HearsayMobileAccountResponseMsg
- HearsayMobileLoginResponseMsg
- HearsayMobileUserResponseMsg
- HearsayNameSpaceUtil
- HearsayNotificationsCtrl
- HearsayNotificationsInfoMsg
- HearsayNotificationsService
- HearsayObjectWrapper
- HearsayOrgConfigCtrl
- HearsayOrgConfigService
- HearsayPostInstallationScript
- HearsayRecipientInfoWrapper
- HearsayRelateTextCtrl
- HearsayScheduledMessageCtrl
- HearsayScheduledMessages
- HearsaySendMessageWrapper
- HearsaySettingsService
- HearsaySettingsWrapper
- HearsayUninstallationScript
- HttpUtil
- ILogWriter
- JSONParse

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- LogPruneBatch
- LogPruneQueueable
- LogPruneSchedulable
- LogToObject
- Logger
- LoggerMsg
- MetadataService
- PicklistOptionWrapper
- SentryCalloutJob
- hearsayInfo