hearsay

Hearsay Sites Admin Guide

Contents

Hearsay Sites allows you to provide branded websites to your field. As an admin, you can effectively manage website programs via a centralized platform that empowers your field representatives with personalized, compliant websites that drive new business.

This guide will help Admins create and select formats and creative assets for their organization's Hearsay Sites.

Product Overview

Hearsay Sites is built atop the Hearsay business platform, the pre-eminent omnichannel 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 concerns.

HEARSAY SITES FEATURES

With Hearsay Sites, you can:

- Manage your profile and website, create a professional and cohesive online image
- Share quality content, showcase your thought leadership by creating and managing posts
- Create events, host virtual or in-person meetings for your clientele
- Follow up on your leads gathered through your website

GET SUPPORT

NORTH AMERICA
888.399.2280

UNITED KINGDOM
+44.800.808.5124

EMAIL
support@hearsaysystems.com

HELP CENTER
https://success.hearsaysocial.com/hc/en-us

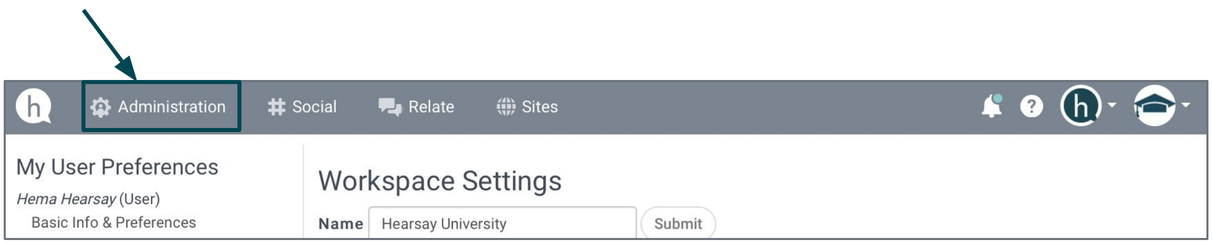
Branded websites built for your field

Getting started

The Hearsay Sites administrator can create formats and assets for all end-user websites. You will log into your Sites admin tool and have add and edit rights pre-assigned them content (media).

Please contact your customer success manager for access to the sandbox and production environment Sites admin tool. We recommend testing out changes in the sandbox before applying them in production. Additionally, contact your customer success manager for your log-in or password information.

All other administrative functions can be carried out within the **Administration** tab in Hearsay.

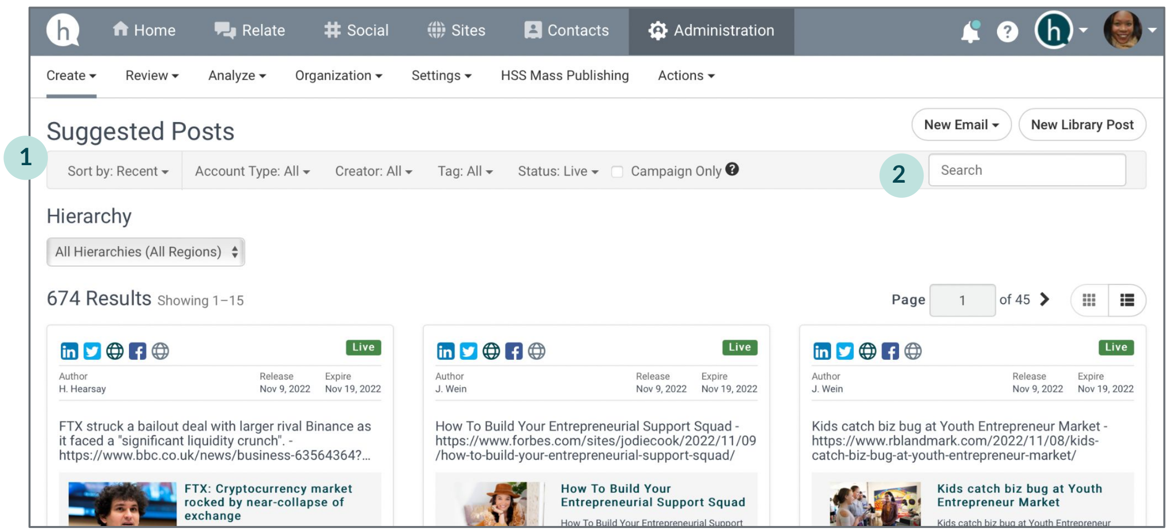


Create Tab

The Create tab is where marketing-focused admins will go to create **suggested posts**, manage **content channels** and **campaigns**, create **suggested profiles**, and add **corporate news**.

Suggested Posts

Clicking on **Create > Suggested Posts** will take you to the Suggested Posts page, which houses all the pre-approved content from your marketing/social media team. This is where admins can create new library posts for the field to share.

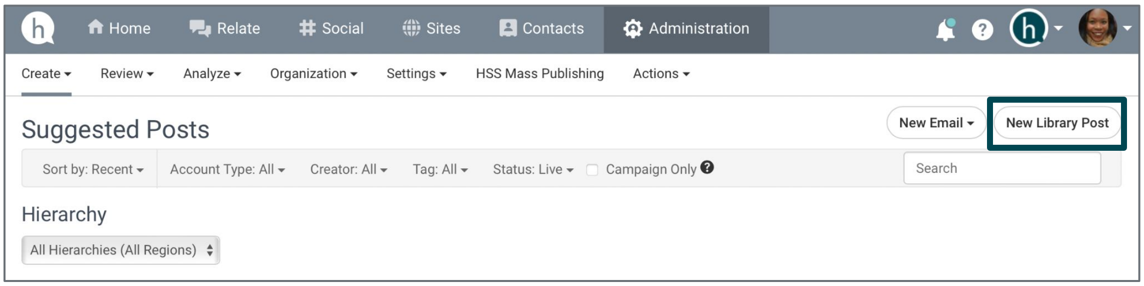


1. Sort Suggested Posts by:
   - **Engaging:** Content that is receiving the most likes, comments, and shares on social media
   - **Popular:** Content that the majority of users within your organization is publishing
   - **Recent:** The newest content added to your library
   - **Account Type:** Filter by content for each available account type
   - **Creator:** Who has created content
   - **Tags:** View content with specific tags
   - **Status:** Filter by Draft, Live, Unreviewed, Scheduled, Live, Expired, Denied
   - **Campaign only:** View content that is tagged for campaign use only and unavailable in the end-user Suggested Post Library
2. Type a keyword or topic in the **Search** box to find related content

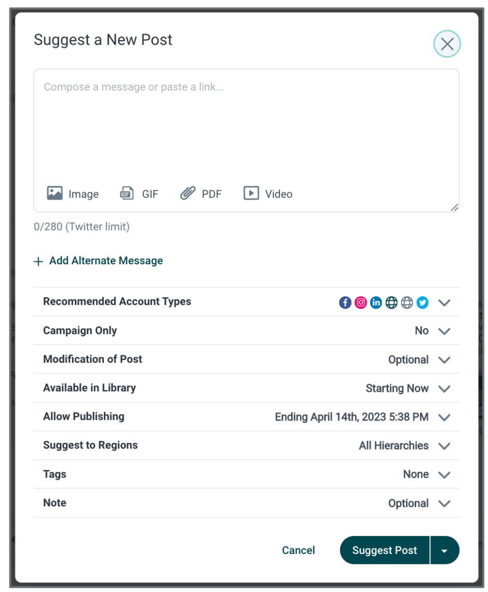
Creating a New Post

Follow these steps to create a new post. Keep in mind, admins can create content only for the hierarchy or hierarchies that they are in.

1. Select **New Library Post** from the top right of the **Suggested Posts** screen.



2. In the **Suggest a New Post** window, review the fields:



Text box: Add a text caption or paste a link to a website in the post.
Image: Add a photo/image to your post.
GIF: Add a short image clip with no sound (Graphical Interchange Format) to the post.
PDF: Attach a PDF to the post.
Add Video: Include a video with the post.
Recommend Account Types: Make sure to check the box next to Hearsay Sites to allow the content to publish to Sites.
Modification: Specify how a post can be modified by choosing Optional, Prohibited or Required.
Optional: The text can be modified.
Prohibited: The text cannot be modified.
Required: The post will have sections enclosed in brackets that require the user to edit prior to being published.

Available in Library: Select to either release the post to the library **Now** or **Set Release to Library Date** to select a date and time for the post to become available.

Allow Publishing:

Can Publish On: Set a specific date for the post to be eligible for publishing by end users. If you set a future date, this content will be visible in "Pre-released" but cannot be published until the "publish on" date.

Cannot Publish After: This is the expiration date for this content. Expiration dates can be added to a post before or after it has been made available.

Suggest to Regions: Specify the region(s) or hierarchy of your organization that can publish this post.

Tags: Set a category that can end users can use to search for content.

The Pin Tag: Allows you to select content to be highlighted in the Suggested Content email.

Note: An internal message you can write that is only visible to your organization.

2. Once the fields have been completed, select:
   - **Suggest Post** to add the posts to the users' Post Library
   - **Save as Draft** to store the post for later review
   - **Request Approval** to route the content to compliance for review and approval
   - **Cancel** (or the "X") to exit the Create process without saving the current post

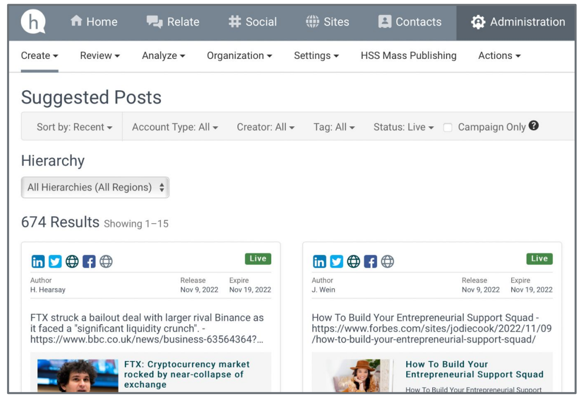
Note: Request Approval is available if your organization requires your library posts to be reviewed and approved to follow any compliance or regulatory policies.

Cloning a Post

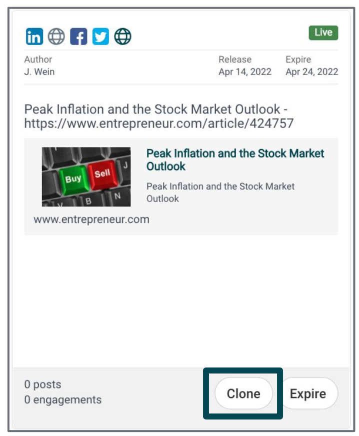
As an Admin, you can clone, or create a copy, of a piece of suggested content. Cloning retains the existing hierarchy targeting from a post and creates a new content ID for that content.

Follow the steps below to clone a post:

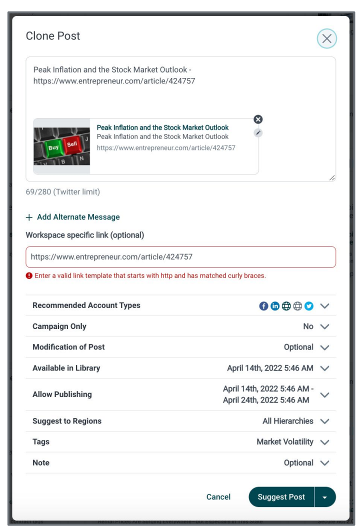
1. Navigate to Create > Suggested Posts.



2. Click on the “Clone” button on a piece of content in the library.



3. Update the fields and select one of the drop-down options to suggest, save or request approval.



Content Channels

Content Channels enable admins to import RSS feeds into Hearsay Social and convert them to suggested posts for their end users.

Adding a Content Channel

To add a new Content Channel:

1. Click on Create > Content Channels.
2. Select **Edit Channels** from the upper-right of the screen.
3. In the Edit Content Channels box, select **+Add**.
4. Paste the RSS URL (website link) in the Paste RSS URL Here field under New Feed.
    - Channel Name: To keep the imported feeds organized, customize the name of the Content Channel such as Personal Finance, Entertainment, or News.
    - Force Channel To Picture Type: Selecting this check box forces the display of an image from the RSS Feed.
    - Auto Suggest: Option to direct every update from this content channel to automatically become a post in the Post Library. It is recommended that this option is used sparingly.
5. Select Save.

Editing and Deleting An RSS Feed

To edit an RSS feed:

1. Select Edit on the right side of the Content Channel or the Content Channel dropdown arrow.
2. Edit the content and selections within the RSS feed.
3. Select Save.

To delete an RSS feed, select Remove on the right side of the Content Channel in the Edit Content Channels pop-up box.

To add a suggested post from your Content Channels to your organization's users' Post Library:

1. Select the content you'd like to suggest for the Post Library.
2. Edit the text and customize the post just as you would any other piece of suggested content.
3. Select Suggest to send the post to your users' Post Library.
    a. Select Save Changes to save your changes without sending.
    b. Select Cancel to exit without saving any of your changes.

Note: Request Approval is available if your organization requires your library posts to be reviewed and approved to follow any compliance or regulatory policies before they are displayed in your users' Post Library.

Automated Content Approval

Pre-approval is a process that enables Hearsay administrators to better manage third-party content. By creating a lexicon of filtered words Hearsay will automatically review and approve the selected post. Content passing the lexicon check will be made available in the Content Library. Those that fail will remain in the Content Channel available for manual review.

Automated Content Approval allows for all articles in a content channel to go through lexicon review automatically. If a post passes the lexicon review, it will be suggested to the library. If the post gets rejected, it will remain in the content channel page, where content admins can review the post and take an appropriate action on it. This feature is not available for channels that are not on Auto Suggest.

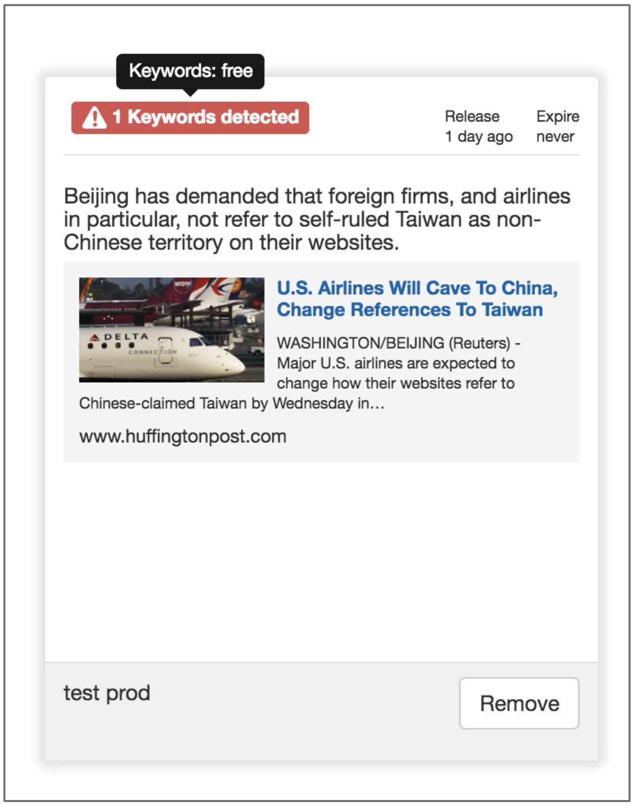
The entire post goes into lexicon review. This means the title, content of the post, and even the post's summary preview text is reviewed, ensuring all parts of the auto-suggested content are compliant.

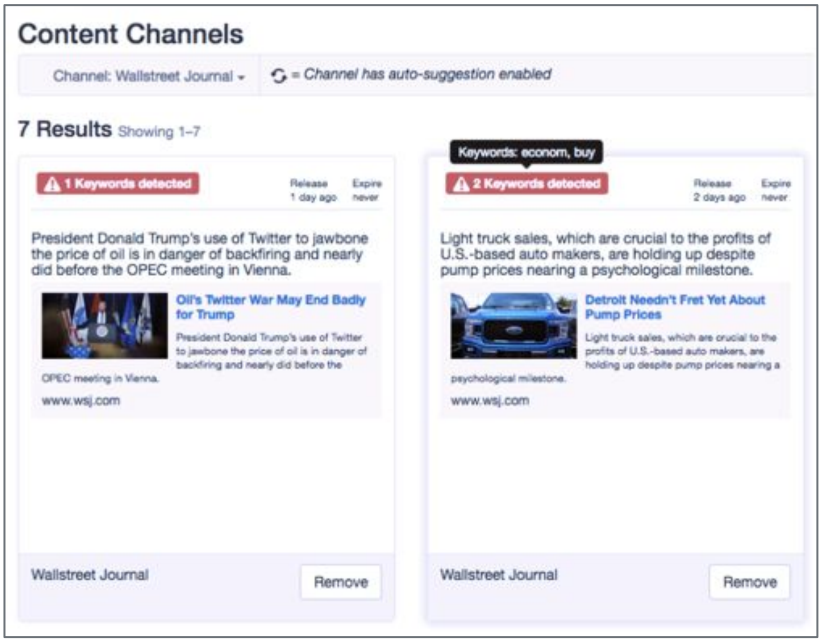
To turn this feature on:

1. Log into Hearsay as an administrator.
2. Click on the Create button in the top bar.
3. Select Content Channels from the options presented.
4. Click the Edit Channels button located at the top right of the screen.
5. Click the Edit button within any channel.
6. Scroll to the bottom of the options presented for that channel.
7. From the Auto Suggest options, select Auto Suggest WIth Review.

All posts from this channel will run through your firm's lexicon list and will be suggested to the library upon passing the review.

If the selected content fails the lexicon review it will remain in the Content Channel. The content will be flagged as failing the review and the words or phrases which failed will be displayed. Administrators can manually decide to add the content to the Content Library. If the content passes the lexicon review, it will automatically be added to the Content Library.
When a post is rejected, you will be able to see which keywords it was rejected for by hovering over the Keywords detected icon.





Campaigns

Admins can curate content with separate pre-determined publish dates as one fluid campaign. Once a user subscribes to a campaign, all of the content within the campaign will be scheduled on their behalf.

When new campaigns are created, users will receive a notification on their home page inviting them to subscribe to the campaign. Compliance related action cards will remain priority, with new campaign and content cards following after.

There are two types of campaigns: Dynamic and Relative.

Dynamic Campaigns – Automate publishing for as long as you like

- Adding New Content – If an admin adds content to a Dynamic Campaign after a user has already subscribed, this content will be scheduled without the user needing to re-subscribe.
- Publishing Schedule – Content from a Dynamic Campaign will be published on a specified date at a specified time.

Relative Campaigns – A short series of posts

- Adding New Content – If an admin adds content to a Relative Campaign that users have already subscribed to, then they will have to unsubscribe and resubscribe in order to schedule the new content. (NOTE: It is highly recommended that Dynamic Campaigns are used if an admin wants to create an ongoing campaign).
- Publishing Schedule – Content from Relative Campaigns will be published on a specified schedule relative to the date an advisor subscribes. Posts are published at specified time intervals.

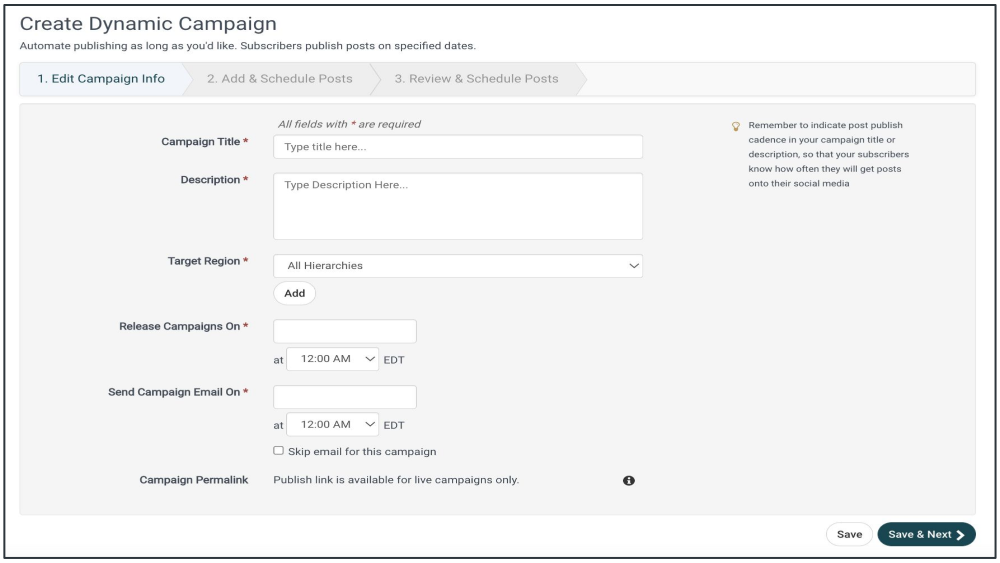
On the Campaigns page, you can sort by campaign type (All, Dynamic, Relative), status (Drafts, Pending Release, Live, Expired), Release Time, and Create Time.

You can also grab the Campaign Permalink. Use this link to promote the campaign using multiple channels. Advisors will be taken directly to the campaign when they click on the link.

Edit all campaigns, delete pending campaigns, and expire live campaigns all from the campaign list. Once a campaign is expired, the user will not be able to see or subscribe to that campaign.

Create a Dynamic Campaign

Edit Campaign Info Section



1. Select **Create > Campaigns**.
2. Select **Create New Campaign** in the top right corner of the Campaign Library page and choose **Dynamic Campaign**.

Fill in the campaign settings:

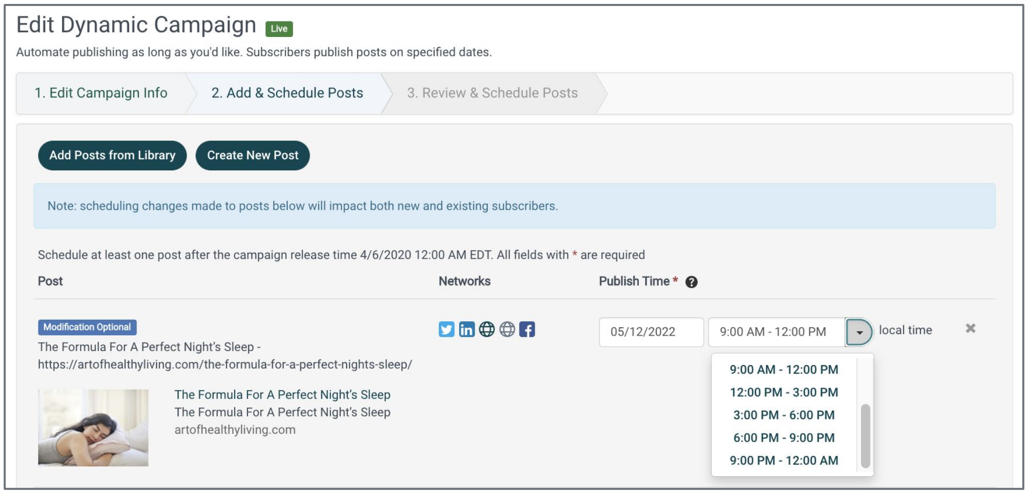
- **Campaign Title:** This will be the title that end users see.
- **Description:** An end user will see this information that explains what this campaign is about.
- **Target Region:** Only the selected regions (and regions which fall underneath) will have access to this campaign.
- **Release Campaigns On:** This will be the date that the campaign is available to end users.
- **Send Email Campaign On:** Here you can choose to schedule an email when the campaign is released to end users, or checkmark Skip email for this campaign to bypass.

The Campaign Permalink will be available once the campaign is live. Use this link to promote the campaign using multiple channels and take users directly to the campaign.

Once settings are determined, select **Save & Next**.

Add Posts from Library

Select existing posts from your Suggested Library that you'd like to include in the campaign. You'll then set the publish date and time once you select the content.



Create New Post

Create new content not yet found within your Suggested Library for use within the campaign.

Post: Displays the media contained within the content.

Networks: Showcases the networks the piece of campaign content will publish to.

Publish Time: Allows the admin to choose the date and three hour window at which time the campaign content will publish for the user.

Once completed, select Save & Next. You will be prompted to review the campaign information before clicking All Set, Schedule Campaign to complete the process.

Creating and adding Campaign Only Content

Admins can create specific campaign content that only be found in campaigns, and not in an end user's Suggested library.

To create campaign specific content:

1. Click **Create** > **Suggested Posts**.
2. Click **New Library Post**.
3. Fill out the post and click the box that states Mark this post for campaign use only.
4. By clicking the ▼ arrow at the bottom, you can choose to save this post as a Draft or click Request Approval to send the campaign only post to your compliance review team before suggesting for a campaign. Or click Suggest to complete the process.

Adding Campaign-Specific Content to a Campaign

Admins can create specific campaign content that only be found in campaigns, and not in an end user's Suggested library.

To add campaign specific content:

1. Click **Create > Campaigns**.
2. Click **Edit** next to an available campaign, or click **Create New Campaign** to start fresh.
3. To add & schedule posts, click **Add Posts from Library**.
4. Checkmark the box that states **Campaign Only**. This will showcase content that specifically designated for campaign use. You can also search for content via their associated tag or designated social network.
5. Click on the content you want to add to the campaign.
6. Once completed, select **Save & Next**. You will be prompted to review the campaign information in the Review & Schedule Posts section before clicking All Set, Schedule Campaign to complete the process.

Create a Relative Campaign

Edit Campaign Info Section

1. Select **Create > Campaigns**.
2. Select **Create New Campaign** in the top right corner of the Campaign Library page and choose **Relative Campaign**.

Fill in the campaign settings:

- **Campaign Title:** This will be the title that end users see.
- **Description:** An end user will see this information that explains what this campaign is about.
- **Target Region:** Only the selected regions (and regions which fall underneath) will have access to this campaign.
- **Release Campaigns On:** This will be the date that the campaign is available to end users.
- **Expire Campaign On:** This will be the date that the campaign will no longer be available to users. This is optional.
- **Send Email Campaign On:** Here you can choose to schedule an email when the campaign is released to end users, or checkmark Skip email for this campaign to bypass.

The Campaign Permalink will be available once the campaign is live. Use this link to promote the campaign using multiple channels and take users directly to the campaign.

Once settings are determined, select **Save & Next**.

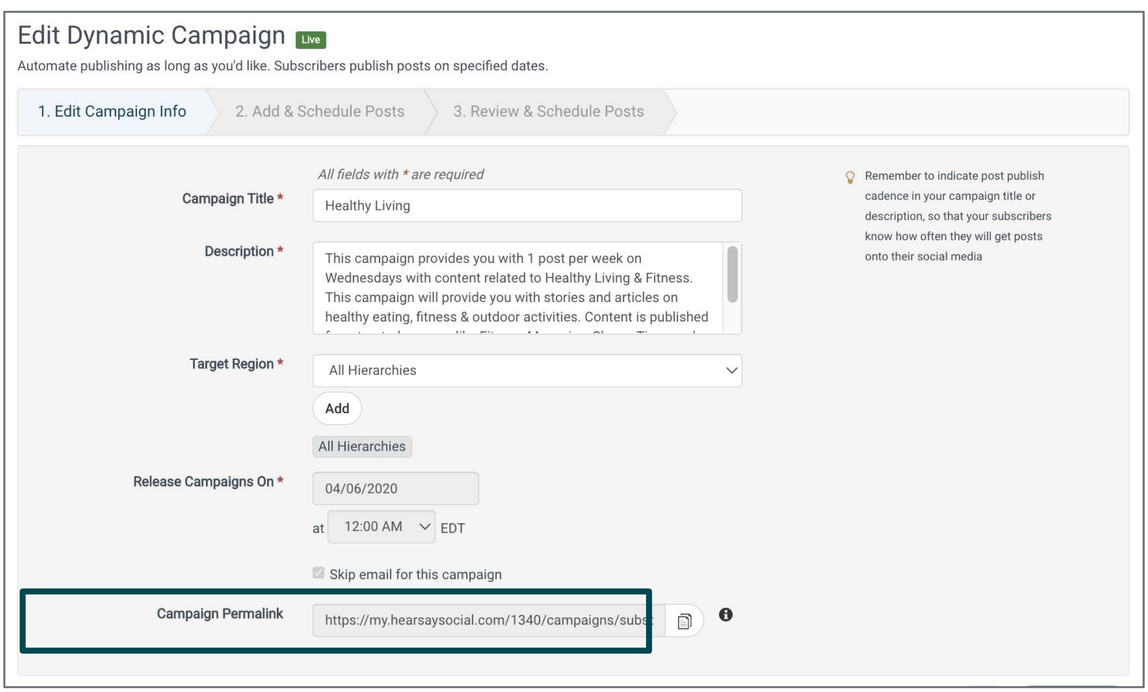
Content is added to Relative Campaigns in the same ways that it is added to Dynamic Campaigns.

Sharing a Campaign with Permalinks

A campaign permalink is a permanent hyperlink to a specific live campaign. When advisors click on the link, they will be taken to their workspace campaign homepage with the campaign highlighted.

To access the permalink:

1. Click **Create > Campaigns**.
2. Click on the campaign of interest.
3. Click on **Edit Campaign** info.
4. Copy the Campaign Permalink at the bottom of the screen. You can also click the clipboard icon to copy it.



Add Facebook Video Posts in Campaigns

Facebook videos can be added to a Campaign in two ways:

- From the Suggested Library
- From Step 2 of the Campaign Edit Screen

To add a video from the Suggested Library:

1. Navigate to **Create > Suggested Posts**.
2. Click **New Library Post.**
3. Click **Video** and select a video file to upload. A preview of the uploaded video will be shown.
4. Click **Suggest Post**.
5. Navigate to **Create** > **Campaigns,** select a campaign, and select Step 2 of the Campaign edit screen entitled **Add & Schedule Posts**.
6. Click **Add Posts from Library**.
7. Select the video post from the side panel.
8. Specify the date/time for publication.
9. Click **Save** or **Save & Next**.

To add a video from Step 2 of the Campaign Edit Screen:

1. Navigate to **Create**> **Campaigns**.
2. Edit or create a new Campaign.
3. Navigate to Step 2 of the Campaign edit screen entitled **Add & Schedule Posts**.
4. Click **Create New Post**.
5. Click **Video** and select a video file to upload. A preview of the uploaded video will be shown.
6. Click **Create Post**.
7. Specify the date/time for publishing and click **Save** or **Save & Next**.

To upload a Facebook video please ensure the file is less than 4 GB and in MP4 or MOV format.

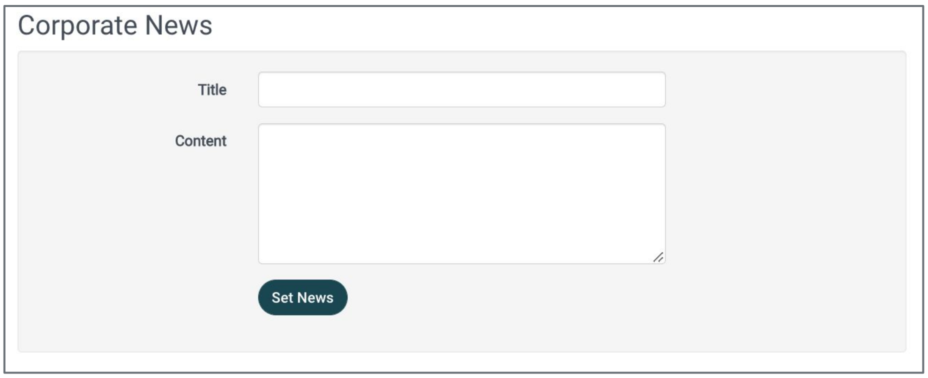
Corporate News

Create and share internal updates and news within your organization. What you write in Corporate News will only appear in users' Notifications section in Hearsay Social.

Creating Corporate News

To create Corporate News:

1. Select **Create** > **Corporate News.**
2. Enter a title.
3. Enter your internal message.
4. Select **Set News.**



Note: Corporate News cannot be mass deleted once set. Contact your Customer Success Manager (CSM) if you have an issue.

Review Tab

The Review tab is where compliance-focused admins will go to review Supervision items. Supervision refers to the review workflows which admins perform within the Hearsay Systems platform. This includes:

- Conducting pre-review on static (eg: Social Media Profiles) and dynamic content (eg: Posts, Comments). In Supervision, these items are referred to as **Approval Requests.**
- Conducting post-review on static and dynamic content to Dismiss, Resolve, or Approve those items (eg: Social Media Profiles, Posts, Comments) based on the organization's configuration settings that trigger these items to be flagged. In Supervision, these items are referred to as **Alerts**.
- Conducting post-review on dynamic content to Dismiss or Resolve those items (eg: Posts, Comments, Private Messages) that were not initially flagged based on the organization's configuration settings. In Supervision, these items are referred to as **Sampled**.

Within the Admin platform, select **Review > Supervision** on the top navigation bar to locate your organization's compliance workflow.

Dashboard

This area allows you to quickly access prior saved searches made within Supervision. You can add and save new searches here as well as rename or delete prior ones.

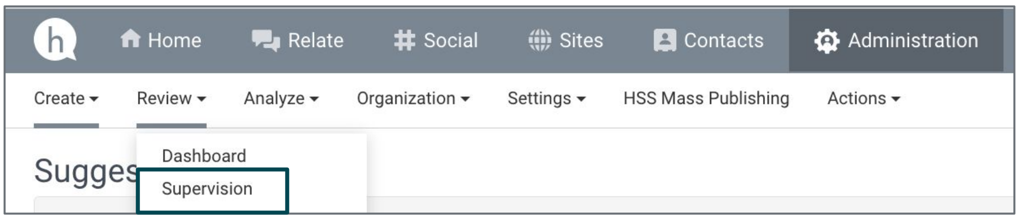
Dashboards are a great way to streamline a Compliance & Supervision team's process and procedure within Hearsay as they are conducting review. Commonly created dashboards include:

- Unreviewed Approval Requests for Profiles
- Unreviewed Approval Requests for Posts
- Unreviewed Alerts for Profiles
- Unreviewed Alerts for Posts, Comments, Likes, Private Messages
- Unreviewed Review Items for a Specific Queue

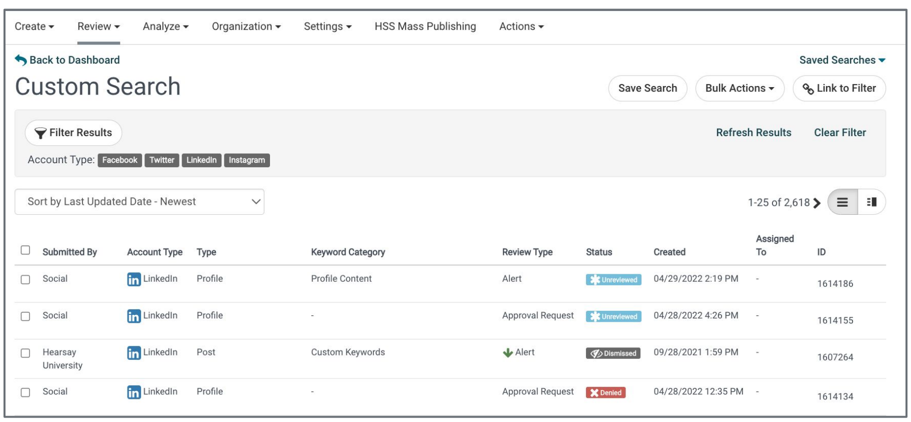
Supervision

Hearsay's Supervision functionality provides a review and approval system that unifies all your review items into one display. Supervision displays alerts, approval requests, and sampled review items, while providing you with the ability to filter and sort your review items to create a more streamlined compliance process for your supervision team or administrator(s).

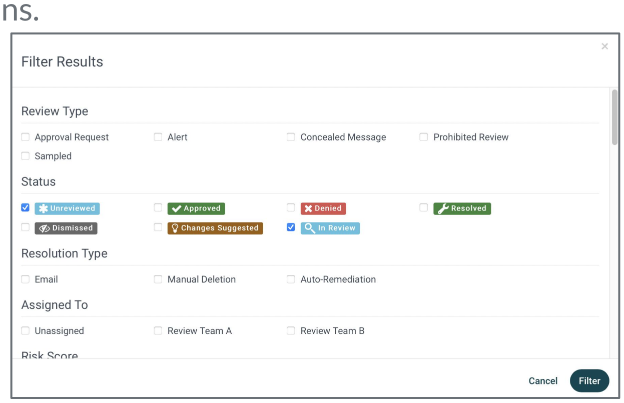
To see a list of workflow items, navigate to the **Administration** dashboard and select **Review** > **Supervision**:



A queue of workflow items appear in the admin's dashboard and each workflow item is marked by their status.



Workflow items can be filtered by Review Types, Status, Account Type, and more by making the appropriate selections.



Supervision Results Table

Submitted By	Name of the user who generated the activity.
Account Type	The social network where the activity took place or is meant for.
Type	The category of the activity, such as post, profile submission, private message, etc.
Keyword Category	Engagement activity which triggers via your organization's lexicon term list.
Review Type: Approval Request	The user has taken action within Hearsay to either publish a post with original content, respond to an engagement, or update their profile/business page information. The action will not complete until a compliance member approves of it.
Review Type: Alert	The user has taken action outside of Hearsay, natively on their social account. This action has already taken place, and Hearsay has detected it. With alerts, a colored arrow will be displayed (green, orange or red), which represents Hearsay's prediction of the severity of the alert, from low risk to high risk. The more an admin approves, resolves, or dismisses an alert, the more Hearsay's supervision tool can better detect important alerts.
Review Type: Sampled	Activities that are sampled did not trigger an alert due to no infraction detected.
Status: Unreviewed	Action by an admin has not yet taken place on the user's activity.
Status: Approved	Only applicable for approval requests. The admin has deemed the user's activity within their compliance policy.
Status: Denied	Only applicable for approval requests. The admin has flagged the user's activity, as it falls outside of their compliance policy.
Status: Resolved	Only applicable for alerts. The admin has contacted the user via email, notifying them that their activity was approved, or the admin has chosen to delete the activity in question.
Status: Dismissed	Only applicable for alerts. The admin has deemed the activity as within compliance, and has chosen not to contact the user.
Status: Changes Suggested	Only applicable to profile approval requests. The admin has deemed the user's profile request to be outside of their compliance policy, and has adjusted the user's requested information to fall within the compliance policy. The user is then given the opportunity to accept these changes, which will then go live on their social account, or the user can resubmit a second request.

Supervision Results Table (continued)

Created	The date and time at which the activity was detected.
Assigned To	The name of the admin who was assigned the particular activity for review.
ID	The reference ID of the activity. This is very helpful when contacting Hearsay Support for assistance.

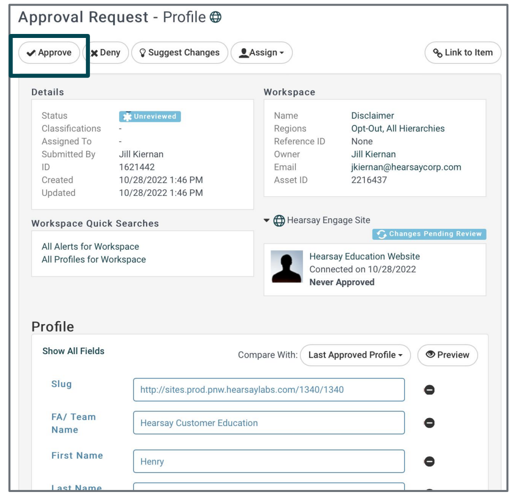
Supervision Filter Results Table

Review Type	Approval Request, Alert, or Prohibited Review (depending on Org Settings)
Status	Unreviewed, Approved, Denied, Resolved, Dismissed, Changes Suggested
Resolution Type	Email, Manual Deletion, Auto-Remediation
Assigned To	Lists queues from which admins are assigned to
Risk Score	Hearsay's prediction of the severity of the alert, from low risk to high risk. The more an admin approves, resolves, or dismisses an alert, the more Hearsay's supervision tool can better detect important alerts.
Account Type	The social network where the activity took place or is meant for.
Type	The category of the activity, such as post, profile submission, private message, etc.
Keyword Classifications	Engagement activity which triggers via your organization's lexicon term list.
Author	Classifies whether the activity was made by the owner of the workspace, or by a social network connection, such as private messaging, or commenting.
Profile Submissions	Filters between profile submissions that were automatically submitted because the user just connected their social account, or the social account already was connected and the user manually chose to submit their profile update.
Workspace	Enables the admin to search for the name of the user, name of the workspace, or the reference ID pertaining to the user/workspace.
Hierarchy	Enables the admin to see region specific activity.
Hierarchy Scope	Enables the admin to see inside the hierarchy selection only.
Match Words	Search for activity containing specific keywords.
ID	Search for activity by using the reference ID of the engagement.
Date/Time Range	Adjust the time frame from when the activity was detected.
Filter by Profile Change	Filter the activity by which field of the social account was updated.

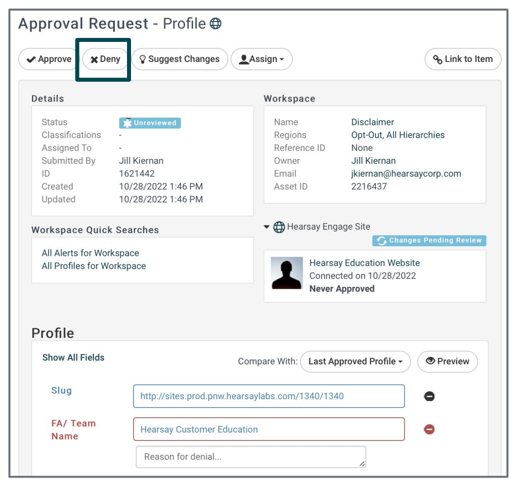
Reviewing Supervision Items

Clicking a supervision item allows you to quickly review the activity in question.

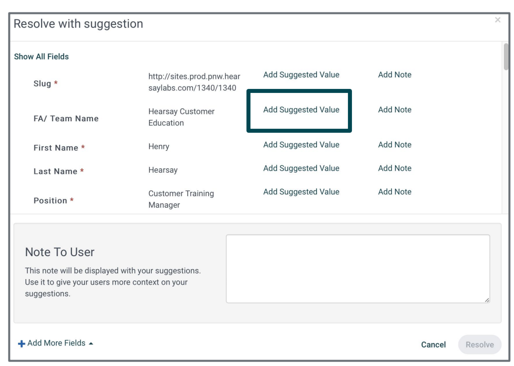
To manage a Profile Approval Request:



1. Click an **Approval Request** from your search results to view it in greater detail.
2. Under **Profile**, sections that the end-user has requested changes for will be displayed. To view and compare the request against the information currently public on the end-users profile, click the field. The yellow-highlighted text represents text the end-user added in that section, and greyed out text, marked by the strikethrough, represents text the end-user removed.
3. The **Action** buttons for Profile Approval Requests are listed at the bottom and top of the screen. If the requested changes for the profile align with compliance policy, click **Approve**. The end-users profile will then update with their new information.



4. If the profile request does not align with compliance policy and therefore must be denied, scroll down to the Profile section and locate the specific fields that do not align with a compliance policy. Click the minus button next to the field to deny it. The field label will turn red and a text box will appear where admins can provide reason and guidance for the end-user. Once finished, click **Deny** and your end-user will receive a notification in their inbox, providing the next steps on how to resubmit their profile for review.



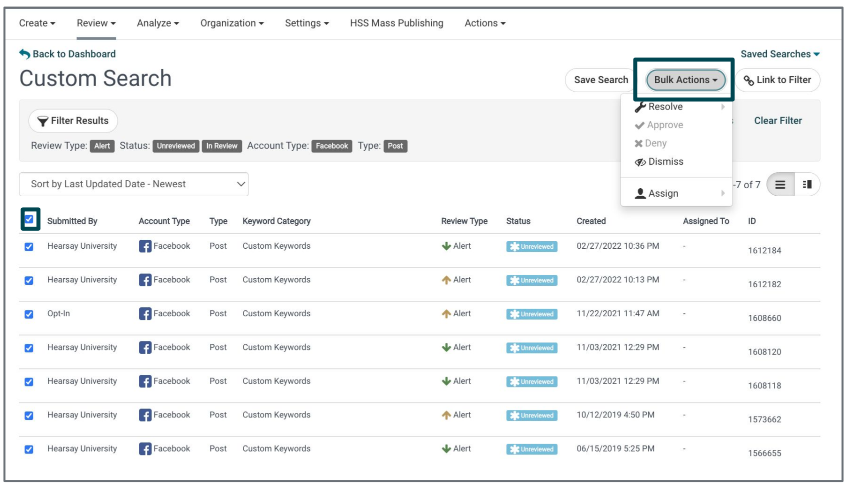
5. To Suggest Changes for a profile, such as a disclosure, contact information, or more, click **Suggest Changes**. In the window that appears, admins can modify the end-user's requested information by clicking **Add Suggested Value**. Doing so will populate a text-editable box where admins can add, change or remove text from the request. Once finished, click **Resolve**. Your Suggested Changes will be sent back to the end-user, and if the end-user accepts the changes, their social profile or page will update with the approved information.

Bulk Action of Supervision Items

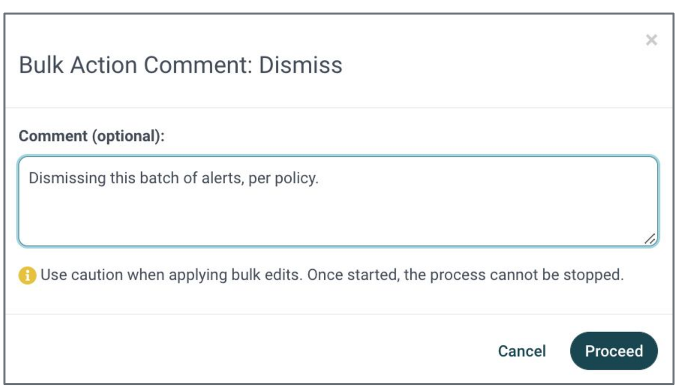
Admins can save time and effort by taking bulk actions on Supervision items.

To take a bulk action on Supervision items, they must be the same type of action (i.e. Sites Profile Approval Requests, Sites Post Alerts).

1. Navigate to **Review** > **Supervision**
2. Filter for the type of alert you would like to take a bulk action on.
3. Checkmark box next to items individually or checkmark the box at the top to select all of the items displayed on the page. You can act on up to 25 items at once based on the pagination in the Supervision view.
4. Click on the **Bulk Actions** dropdown and select the bulk action you would like to complete.



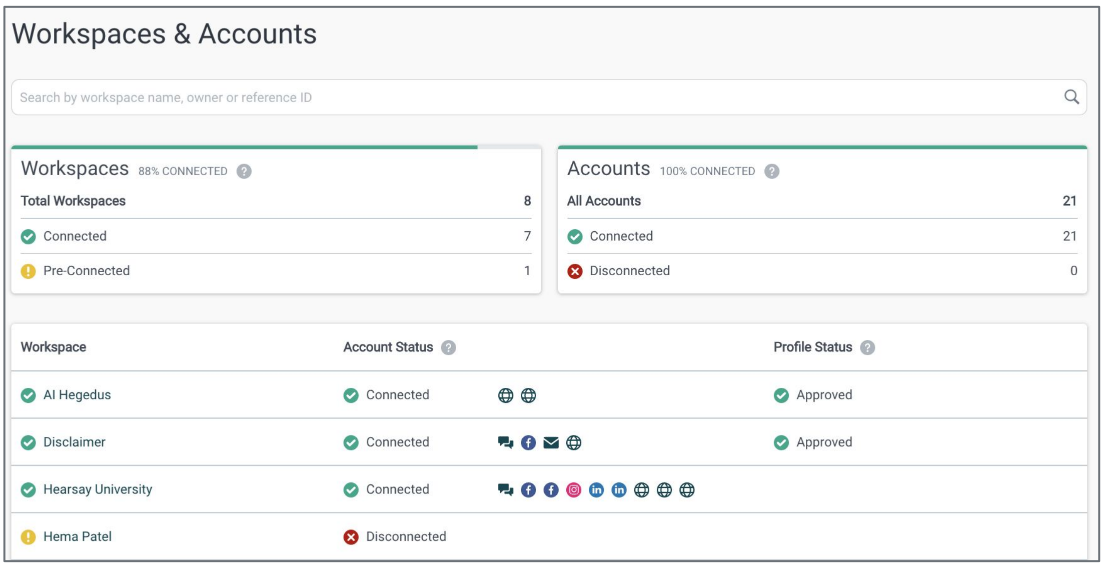
5. You can include a comment that will be added to each individual workflow item. These will appear across individual workflow items to simplify management and remediation. Bulk comments allow you to provide context and more easily track any bulk actions. Click **Proceed** to complete the action.



Workspace & Accounts Overview

On this page, you can easily view a user's entire workspace and any connected or disconnected accounts in one location.

Admins can access the Workspace and Accounts Overview page by navigating to **Review** > **Accounts Overview**, or **Organization**> **Workspaces & Accounts.** There you will be able to view both the Workspaces and Accounts for your organization.

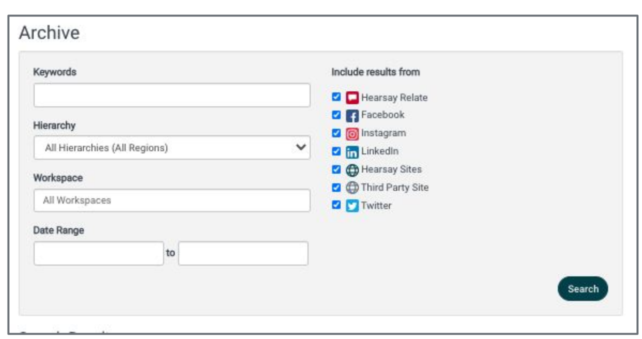


Archive

Keeping accurate and easily searchable historical records of social media conversations and interactions is important and often required by law. If your organization is archiving using Hearsay, all content is searchable under **Review**> **Archive**.

You can filter your Archive by the following:

- Keywords
- Hierarchy
- Workspace
- Date Range
- Social Media Networks



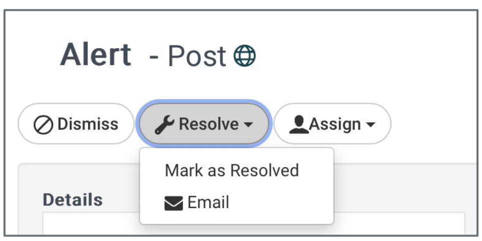
Alerts

An alert occurs when a user creates or updates their Site on a native site (third-party connected site) that is connected to their Hearsay account. An alert is a **post-activity** event because it occurs after the user has created or updated content on the native site.

If the Hearsay account has a lexicon filter in place and the content does not violate the rules of that filter, then the content will remain on the social media site.

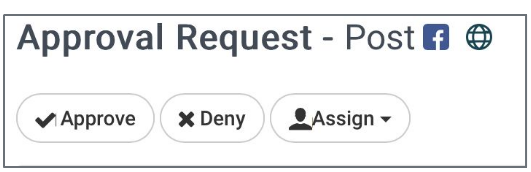
However, if the Hearsay account has been configured such that all native posts require administrator approval, then an administrator will review an alert. The admin must then review the content and do one of the following:

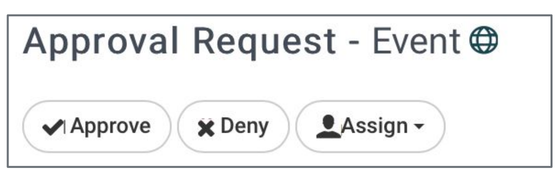
- Dismiss the alert (i.e. implicitly approves the content), in which case the content remains on the native site as is.
- Email the user with suggested changes, in which case the user must make the changes, thus restarting the whole process.
- Delete the item (i.e. post) altogether which removes it from the native site.



Approval Requests

An approval request occurs when a user submits content that requires review before it can be posted. Since this activity occurs before the content goes live (i.e. appears on the native site), it is said to be a **pre-activity** event. Approval requests include all workflow items from the **Pending Posts**, **Suggested Posts**, and **Pending Activities** queues, and may also include **Profile Approval Requests** for profile changes and **Events**.

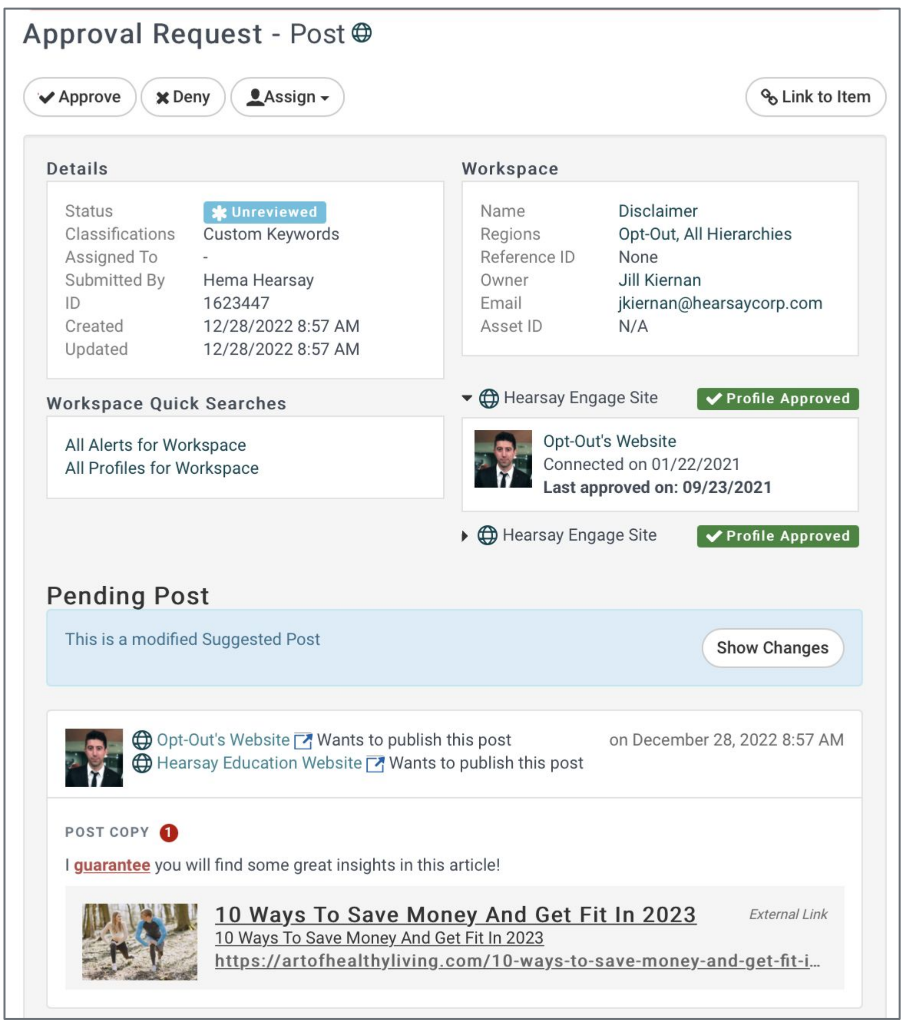




For Pending Posts with Flagged Lexicon in Place

A **Pending Post** occurs when the user requests approval through Hearsay. If a lexicon filter has been configured, then the following workflow occurs:

- If the post does not violate the rules of the Hearsay account's lexicon filter, then it is published to the native site.
- If the post violates the rules of the Hearsay account's lexicon filter, then the event is listed in the **Supervision** dashboard and marked with **Approval Request** and the lexicon term will be listed in red in the Pending Post section. An administrator must then review the post and do one of the following;
    - Approve the post, which keeps the post as is on the site.
    - Deny the post, in which case the user receives the reason for the denial, and must update the post to restart the whole process.



For Pending Posts Where all Posts Require Approval

A Hearsay account can be configured so that an approval for **Pending Posts** is either required or optional, depending upon compliance requirements. If the account has been configured so that approval is required, then each post will be flagged for admin approval within the **Pending Posts** queue.

Rules for Scheduled Posts:

- If an admin approves a scheduled post before the scheduled publish date, the post will be published at the scheduled time. The user will also have the option to reschedule the post for another future date.
- If the admin approves a scheduled post after the scheduled publish date, the post will be published immediately upon approval.

For Suggested Posts

An admin such as a marketing administrator can create content suggestions and post them to the **Content Suggestions** queue for review by a compliance administrator. A compliance administrator must then review the suggestions and do one of the following:

- Approve the content suggestion, in which case the post will appear in the target **Suggested Posts** library for the marketing administrator to use.
- Deny the content suggestion, in which case the post is marked as denied and the marketing admin is notified about the reason for the denial. The marketing admin must then create a new post (or clone the denied post to create a new copy while retaining a record of the denied version), make the suggested changes, and re-submit for review.

This workflow applies only when the pre-approval setting for content suggestions is enabled.

For Pending Activities

The **Pending Activities** queue lists activities other than posts performed by a user that have been flagged for an admin to review and approve prior to being posted on their site. **Pending Activities** are considered **pre-activity** workflow items because they require approval before they are applied to the native site through Hearsay.

For each event in the **Pending Activities** queue, the administrator must do one of the following:

- Approve the activity, which in turn applies the activity to the native site.
- Deny the activity, in which case the activity is not applied to the native site.

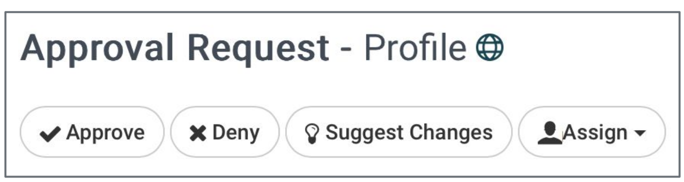
For Profiles Edited through Hearsay or on the Native Site

Depending on the configuration of the Hearsay account, profile changes submitted by a user through Hearsay can take one of two paths:

1. Profile changes are submitted for review before being published to the native site.
2. Profile changes are published directly to the native site in which case an admin will receive an alert for review.

Upon submission, an admin reviews the profile, and must do one of the following:

- Approves the profile if it is compliant, in which case no further action is required.
- Deny the profile, in which case the user can do the following:
  - Update the profile through Hearsay and resubmit it to restart the whole process.
  - Make no change, in which case the user profile is flagged as denied and the admin receives an alert.
  - Make the change on the native site, in which case the user profile is flagged as denied and the admin receives an alert.
- Suggest changes to the profile, in which case the Suggested Changes will be sent back to the end-user, and if the end-user accepts the changes, their social profile or page will update with the approved information.



Depending on the network and field, users may need to copy and paste the approved updates natively on those sites.

For Profile Auto-submissions when Connecting to Hearsay

When a user first connects a social media account to the Hearsay platform, the social media profile is routed to an admin for review to ensure that the profile is compliant. Upon this auto-submission, the profile enters a grace period configured by the organization, during which users must make the requested edits to ensure their profile is compliant. Upon entering this grace period an administrator reviews the profile and does one of the following:

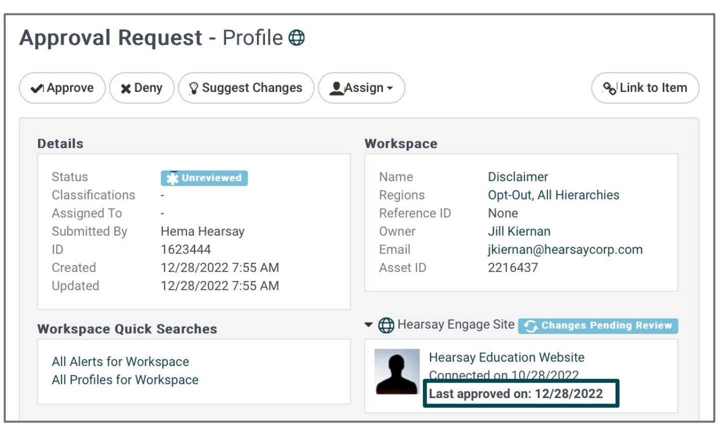
- Approves the profile if it is compliant, in which case no further action is required.
- Denies the profile, in which case the user must do one of the following:
    - Update the profile through Hearsay and resubmit it. During the grace period, the admin will be notified, and will re-review the profile for compliance.
    - Make no change, in which case the user profile is flagged as denied and the admin receives an alert.
    - Make the change on the native site, in which case the user profile is flagged as denied and the admin receives an alert.
- Suggest changes to the profile, in which case the Suggested Changes will be sent back to the end-user, and if the end-user accepts the changes, their social profile or page will update with the approved information.

The maximum number of days for the Grace Period is 60.

Labels to Indicate Approval Status of Profiles in Supervision items

The labels to indicate approval status of profiles are enabled by default. These labels:

- Display the last approved profile date or indicate that there is no approved profile on record.
- Help admins more easily determine whether a user has an approved profile in the system.

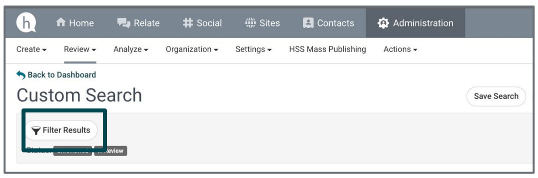


Filtering Workflow Items

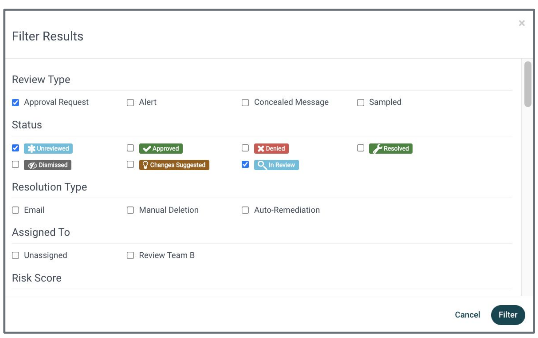
Filtering allows administrators to create custom searches for reviewable workflow items in the Supervision Dashboard.

To configure filtering:

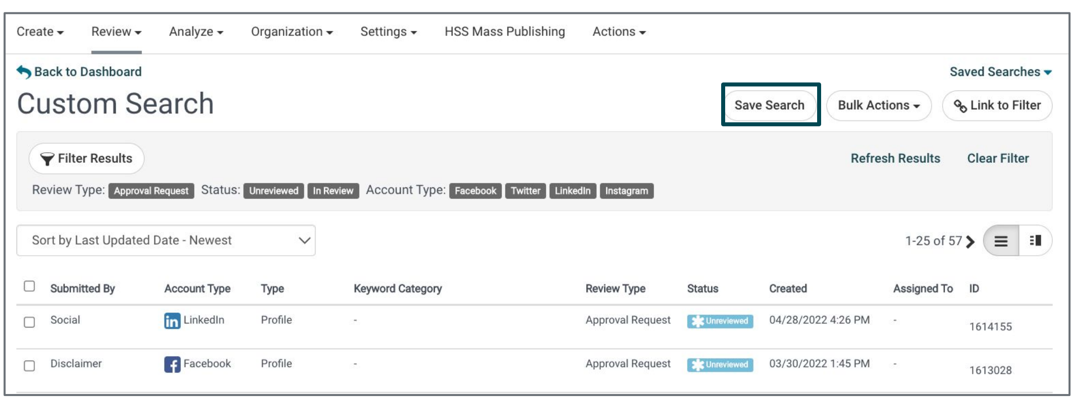
1. Open the Admin Dashboard.
2. Navigate to **Review** > **Supervision** and click **Filter Results** to display the Filter Results configuration popup:



3. Select the desired items to filter by (descriptions are documented on page 26) and click **Filter**.



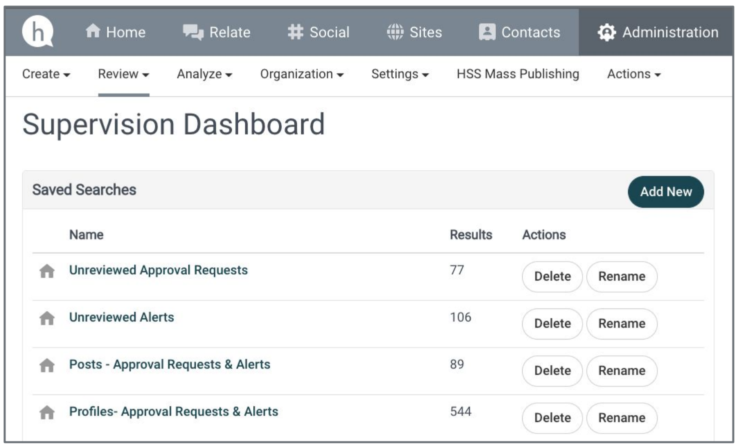
4. Your filtered results will be displayed. Pro tip: Make sure to save your search results by clicking **Save Search,** entering a descriptive name, and clicking **Save**. Applying descriptive names when saving a filter makes it easy to identify the filter's use case.



Accessing Saved Filters

The Supervision Dashboard allows you to quickly access previously saved searches. You can add new searches here, as well as rename or delete prior ones. Saving searches allows you to create a more streamlined compliance process for your supervision team. Once saved, these searches will appear on the **Review** > **Dashboard** tab along with the number of results that potentially need action taken upon them.

To start you off, we recommend these Saved Searches:



You can delete or rename a filter from the Supervision Dashboard as well.

Profile Auto-Remediation

Profile Auto-Remediation enables Hearsay to automatically revert a profile, if changed natively, back to the last compliance-approved version.

As an example:

1. An advisor changes their profile natively.
2. Hearsay detects these changes and reverts the profile information, referencing the last supervision-approved version of the profile. Hearsay will also automatically submit a profile approval request on behalf of the advisor, containing all the changes the advisor made natively.
3. Compliance can then review this request, and choose to approve or deny it.
    - **Deny**: if the advisor has an older approved profile, Hearsay auto-remediates to the prior approved profile
    - **Approve**: this approved profile becomes the basis for all future auto remediations
    - **Suggest Changes**: the version an admin suggests becomes the new approved profile version used for auto remediation

Partial Auto-Remediation happens when Hearsay can only revert some fields in a user's profile due to API limitation. Hearsay consolidates the result into "successful" or "unsuccessful" remediations to simplify the process.

If remediation is successful:

- Hearsay creates a profile change request and submits it for supervision on behalf of the advisor.

If unsuccessful:

- Hearsay creates an alert, showcasing the detected native changes, and allows compliance admins to follow up with the advisor to make necessary changes.

If an advisor submits an approval request in Hearsay but then immediately makes changes on the social network natively before the admin takes any action, Hearsay auto-remediates based on the previous approved profile and either creates an alert or a new approval request.

If an alert is generated:

- It can be resolved when the approval request is approved/denied if both the alert and the native changes contain the exact same language.

If the advisor submits an approval request in Hearsay, then immediately makes changes on the social network natively that do not match the language in the request:

- Hearsay auto-remediates based on the previous approved profile, and either creates an alert or a new approval request.

Profile Auto-Remediation FAQ

Q: How can I enable this for my organization?
A: Please contact your Customer Success Manager to have this enabled.

Q: Will the end-user be notified that their profile has been auto-remediated?
A: End-users will receive an email if the auto remediation is 100% successful.

Q: What are the scenarios in which a profile goes into an Action Required Post Remediation versus Pending Approval?
A: If there is an existing approval request for the profile or there are changes suggested from the admin (i.e. profile status is changes pending review and changed suggested), Hearsay auto-remediates the profile without creating an approval request as there were changes already in pending status. An email notification will not be generated.

Q: In Supervision queue, how can you tell which approval requests are a result of auto-remediation?
A: In Supervision, click Filter and make sure to checkmark **Profile Submissions >Autosubmitted.**

Q: Is Twitter profile auto-remediation supported?
A: Due to API limitations, Twitter auto-remediation is currently not supported.

PDF Capture of 3rd Party Links

PDF Capture enables the automatic archiving of 3rd party links published by users to their networks. This greatly reduces the manual process compliance admins must follow in order to comply with FINRA guidelines. It simplifies the role of the compliance Admin by automatically "freezing" the showcase URL, capturing a pdf of the website at the time it's processed via Hearsay and including it in an archive email.

When the Hearsay compliance platform processes a social media post that contains a link URL, the PDF snapshot service will generate a PDF of the third-party URL and include it in a second archive email sent to the customer.

To enable PDF capture, contact your Customer Success Manager.

Whitelist Publishing Sources

Whitelisting 3rd party content sources enables any content published from that source to be archived but not scanned for lexicon terms. This allows advisors to publish directly to their networks, streamlining their content workflow and saving compliance teams time.

Hearsay can configure a 3rd-party publishing source to be whitelisted as a trusted source of content. Any content that is published directly to social accounts from that source will be archived by Hearsay but not scanned for lexicon terms. 3rd-party publishing sources can be set based on hierarchy.

Analyze Tab

The **Analyze** tab is where you can monitor and evaluate your organization's social media activity metrics via Hearsay Dashboards and Reports. The dashboards and reports provide actionable insights on your program's performance, centered on content, compliance, directory, and social media performance.

Getting Started

1. From the Analyze tab, you can navigate to either Reports (for individual reports) or Dashboards.
2. You can access additional documentation and definitions of the report's column headers by selecting the report and clicking **Report documentation and data dictionary available here**.
3. The latest data available is from the day before the current date and not real time data. All changes recorded until 0:00 UTC are loaded by 9:30 UTC. As no date filter can be applied on the report, when downloaded after 9:30 UTC, the data in it will show the status as of yesterday.

You can access and download Hearsay's Guide to Reports & Dashboards via this link.

To generate and download a report:

1. Select the report
2. Select the date range of data
3. If applicable, select other filters (e.g. by region, tags, etc.)
4. Click **Filter Report**
5. Click **Download Report**

Organization Tab

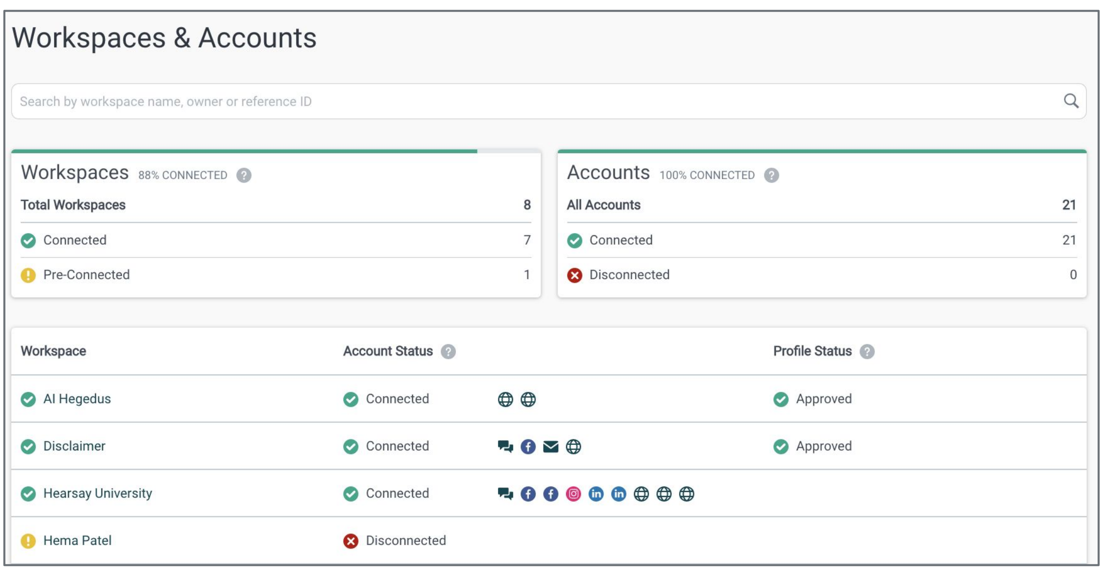
The **Organization** tab provides the following submenus:

- Workspaces & Accounts
- Users
- Hierarchy
- User Invitations

Workspace & Accounts

On this page, you can easily view a user's entire workspace and any connected or disconnected accounts in one location.

Admins can access the Workspace and Accounts Overview page by navigating to **Review** > **Accounts Overview**, or **Organization**> **Workspaces & Accounts.** There you will be able to view both the Workspaces and Accounts for your organization.



Users

The **Users** tab allows Admins to view their Users within Hearsay. This page will display both **users** and **workspace owners**. Workspace owners are users who own a workspace. Whereas a user is an assistant or team member that manages or shares the social media responsibilities.

Accessing Users

To access Users, navigate to **Organization**> **Users.**

Searching for Users

You can use the search bar at the top of the screen to search for users. The drop down to the left of the search bar allows you to search by name (default), email, or reference ID. If applicable, you can enable the **Administrators only** checkbox to search for administrator users only.

The search results include the following information for each user:

- **Name**: the user's name. Click on the name to see more information (e.g., when they joined Hearsay and what workspace they belong to).
- **Email**: the user's email address.
- **Reference ID:** the user's reference ID.

Editing a User

When you click on a user's name in the search results. the user screen is displayed, allowing you to view and edit their information.

Viewing and Editing User Details

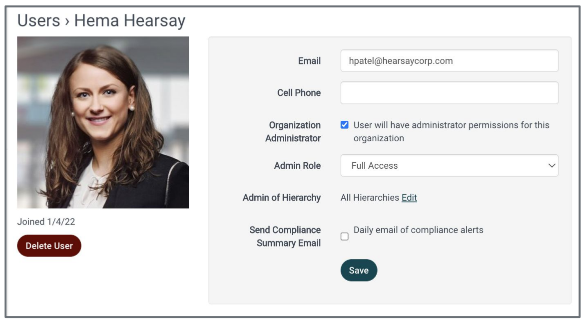
You can view and edit the following user fields near the top of the screen:

- Email: the user's email address.
- Cell Phone: the user's cell phone number.
- Organization Administrator: specifies if the user is an administrator. Enabling this field displays the following additional fields:
    - **Admin Role**: specifies the permissions to allow.
    - **Admin of Hierarchy**: specifies the regions that the user can administer.
    - **Send Compliance Summary Email:** when enabled, the user will receive a daily email of compliance alerts.

Deleting a User

The **Delete User** button allows admins to deactivate a user's account. Pressing it will:

- Deactivate the user's account and prevent access to Hearsay.
- Remove the user from any workspace(s) they are associated with.
- If the account is listed as the owner of the workspace, the workspace will be deactivated. In addition, if the workspace contains workspace members, who are not associated with any other workspaces, their Hearsay accounts will be deactivated as well.



Adding and Removing Workspaces

The **Workspaces** section within the **Users** tab allows you to view and edit the workspaces that the user manages. The list view displays the names of the current workspaces.

To add an additional workspace, select a workspace from the dropdown list and click **Add**; the workspace will be added to the list view.

To remove a workspace, select it in the list view and click **Remove**.

The **Workspace** section below the dropdown, provides a link to the user's workspace screen.

Managing Mobile Devices

The **Mobile Devices** section lists the following information for each mobile device that the user is logged in to:

- **Device**: the ID of the device.
- **Application**: the application that the user was/is using on the device.
- **Connected**: the date when the user was connected.
- **Last Used**: the date when the user last used the device.
- **Expiry Date**: the expiry date for the login.
- **Access**: allows you to log the user out of the device.

Hierarchy

Hierarchies are used to manage users in discrete groups that may have different user requirements across content, compliance, product usage, and analytics. For example, Administrators can create a separate region of users who will require different social content or who are in another line of business supported by different corporate teams.

Think of the Hierarchy as how your organization maps itself (tree structure) in Hearsay Social. How you set up your hierarchy will affect how you target suggested content to specific departments/regions, filter compliance alert reviews, align internal personnel, and analyze social media metrics and data.

If you need to change something in your Workspace Management or Enterprise Hierarchy, select **Organization**> **Hierarchy**.

Follow the steps below to set up your Enterprise Hierarchy:

1. Select **Open Hierarchy Manager**.
2. To add to the hierarchy, enter the name and select **Add**.
3. Add subdivisions to the hierarchy by selecting the region/department/LOB and repeat the process in Step 2.
4. Restructure and rename your hierarchy by using the **Rename** and **Delete** options. **Note**: You cannot delete a region once it has users in it.

During the implementation process, your CSM can help walk you through the hierarchy setup.

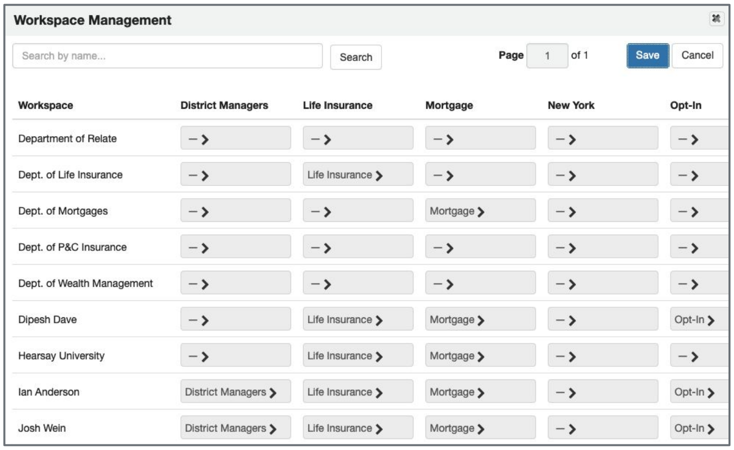
Follow the steps below to move a user to a new workspace within your organization.

1. Select **Organization**> **Hierarchy**.
2. Select **Open Workspace Manager**. Note: You can search for a user in the upper left search box.
3. Select the **Company**, **Region**, and/or **Vertical** and select the new workspace.
4. Select **Save**.
5. **Note**: Only activated workspaces (workspaces that have, or once had a social account connected) will be accessible in the Workspace Manager tool.

Placing Workspaces within a Region

Follow the steps below to place a workspace within a region:

1. Select **Open Workspace Manager.**
2. Search for the workspace in the top-left corner of the window. The hierarchies will be listed horizontally.
3. Within a hierarchy, click the grey boxes to display available regions. Click **Save.**



User Invitations

The User Invitations page will allow you to invite users and admins to have access to Hearsay by sending an invitation directly to their email inbox. The email will contain a one-time use invitation. Once the user accepts the invitation, they will be able to sign up and log into the platform. **User Types**:

- **Company Administrator**: a regional or corporate admin who generally oversees Hearsay and has special permissions (custom configure these with your Hearsay CSM).
- **New Workspace**: a single office, location, or branch. This is the basic organization level associated with a set of connected social accounts.
- **Workspace Member**: someone who helps manage a Workspace using a Hearsay account. Workspace members use their own login credentials, but are otherwise accessing the Workspace account/dashboard and posting to the connected accounts.

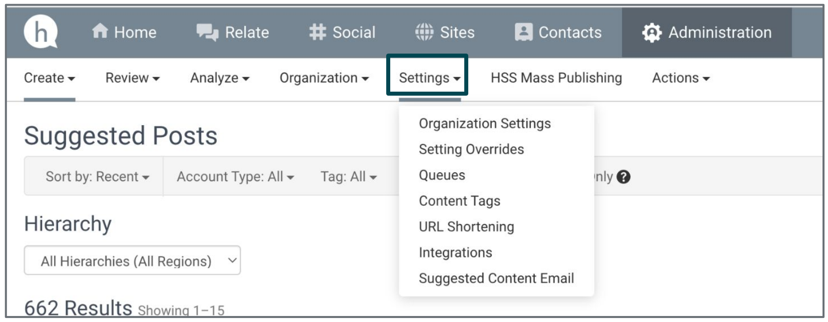
How to send an Invite:

1. Select **User Invitations** from the **Organization** tab dropdown menu.
2. Select the User Type.
3. Enter the User's email.
4. Enter a personal message (optional).
5. Click **Invite.**

Settings Tab

The **Settings** tab provides the following submenus:

- Organization Settings
- Setting Overrides
- Queues
- Content Tags
- URL Shortening
- Integrations
- Suggested Content Email

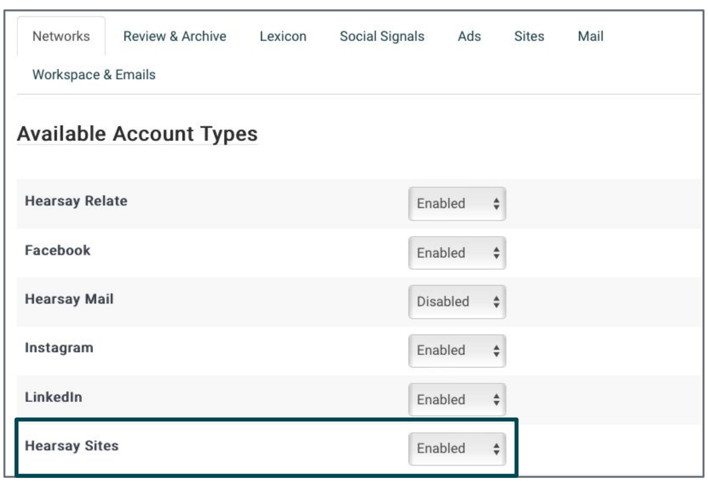


Organization Settings

To access settings that can be set regionally for your organization, select **Settings** > **Organization Settings**. You can navigate to a specific region in your Hierarchy by selecting the **All Hierarchies** dropdown menu. The default is **All Hierarchies**.

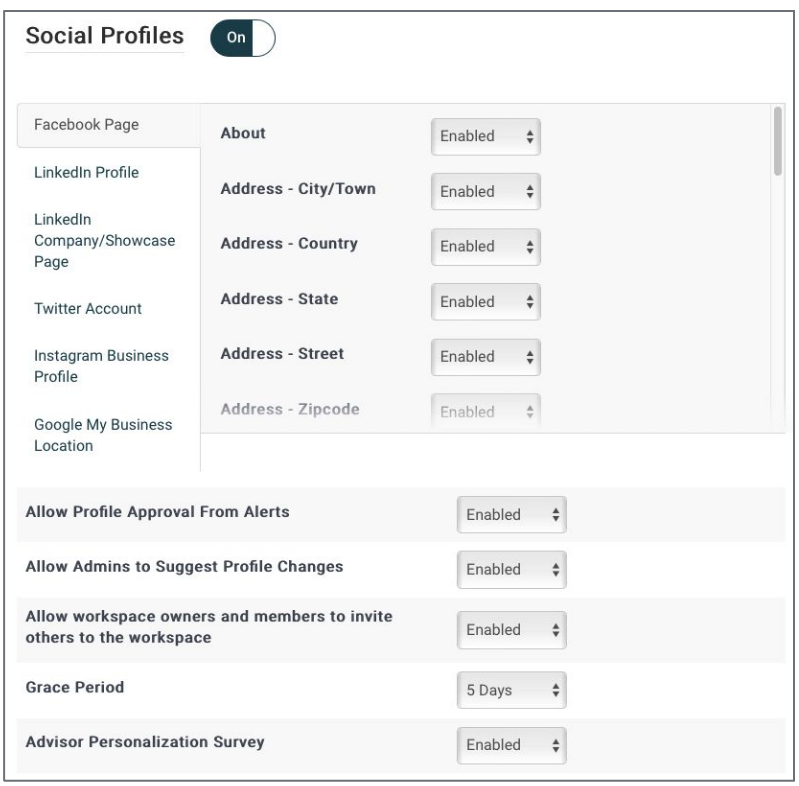
Networks Tab

- **Available Account Types:** Enable Hearsay Sites



Networks Tab (continued)

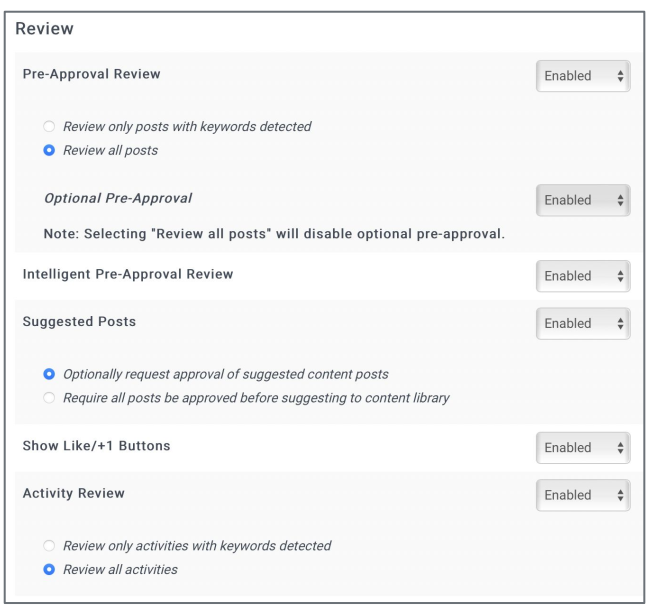
- **Social Profiles**: Hearsay Social can pull in different fields of users' static profile content for review by turning the fields per social network on or off. When turned on, that field of profile content will be monitored and routed for approval the first time a user signs up or when a change is detected on already-approved profile content.
- **Allow Profile Approval from Alerts:** When enabled, this will allow compliance admins to 'approve' alerts as opposed to the ability to just 'resolve' or 'dismiss' them.
- **Allow Admins to Suggest Profile Changes**: When enabled, this will allow admins to type in a suggestion for the contents of a profile field. If the advisor finds the suggestion acceptable, they can simply click 'approve'.
- **Allow workspace owners and members to invite others to the workspace**: Allows users to invite their staff to their workspace to work on their behalf.
- **Grace Period**: Number of days that users have to make their profiles compliant before they're submitted as alerts for review.
- **Allow workspaces to create video posts**: Allows users to publish videos to their connected social media accounts.



Review & Archive Tab

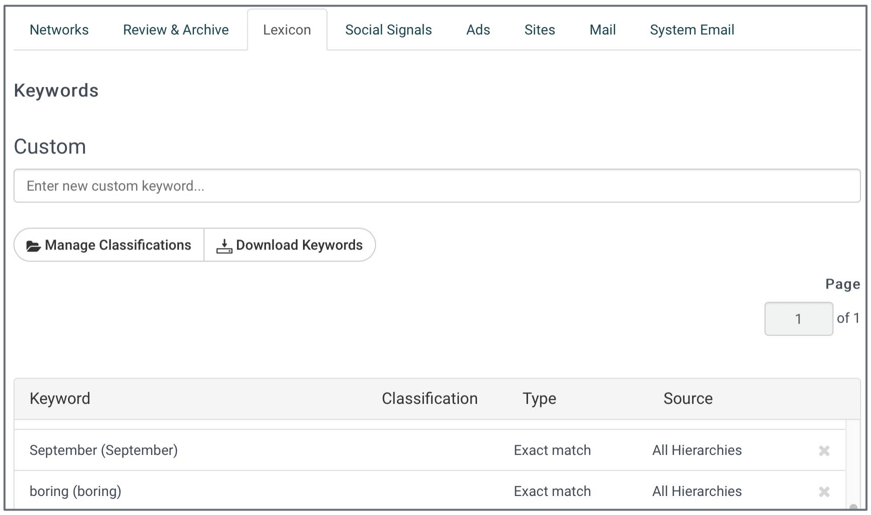
- **Suggested Content Expiration:** Adjust the default expiration rule of suggested content. Note: The content creator can change this expiration date at the time of the content creation.

- **Review > Pre-Approval Review**: Request approval of all content (posts) prior to publishing or request approval of only posts containing keywords. You may also choose whether you want to allow for optional pre-approval which provides users with a dropdown, where they can choose to have their post approved by an administrator prior to publishing the content.
- **Review > Suggested Posts**: Optionally request approval of suggested content posts or require all posts be approved before suggesting to the content library.
- **Review > Show Like/+1 Buttons:** Allow users to see and use “Like” and “+1” in Hearsay Social
- **Review > Activity Review**: Supervise and archive actions taken by users within the Hearsay Social Activity stream. This applies to all actions taken to streams within the Activity tab (Responses, Feeds, Published Posts)



Lexicon Tab (Keywords)

Hearsay can flag certain words, phrases, or numbers for admins to review. Whether you're monitoring your social media pages for compliance infractions, brand mentions, or customer complaints, the keyword lexicon provides the flexibility to track an unlimited number of custom phrases. The keywords will be flagged any time they appear on one of your managed social media pages, regardless of whether the post was created by one of your users or one of their connections.



In addition to your custom lexicon, we cover the basics out-of-the-box:

- Profanity
- Phone Numbers
- Social Security Numbers
- Credit Card Numbers

Keyword Classifications

Hearsay allows you to classify the keywords in your lexicon. Classifications allow you to group sets of keywords together which you can then filter by, report on, and route for approval. Not every keyword needs to have a classification.

Segment for:

- Categories for reporting
- Infraction review filtering
- Escalation

Examples:

- Brand mentions, campaign tracking
- Regulatory, competitive mentions
- High priority/urgent

Matching Rules

In order to clearly define how to flag keywords, the keyword lexicon is structured using different matching rules. **Note**: the keyword lexicon is NOT case sensitive.

Match Type	To Import	Description
Starts with	prefix	Identifies any terms that start with the specified combination of letters
Exact match	exact	Match a word or phrase exactly
Boolean	boolean	A combination of terms to identify a matching or non-matching pair (e.g. Identify all x and y in any order in a sentence or all x only if y is not anywhere else in a sentence)

Configuring Your Lexicon to Prevent Compliance Infractions
When an advisor or agent modifies a post from their suggested content library, or creates their own original post, and if they've included a keyword listed in your lexicon, the user will be prevented from publishing the post.

A prompt will appear, highlighting the lexicon term, and directing the user to either remove the keyword in order to publish the post, or, submit the post for compliance review in its current state.

The lexicon can be configured specific to your organization's hierarchy, and syncs across all Hearsay products, including Social, Relate & Sites. This enables your organization to connect with their network on a deeper level, all while protecting them with fewer work for Compliance administrators.

To add a Keyword:

1. Select **Settings** > **Organization Settings**
2. Click **Lexicon**.
3. Click and adjust the hierarchy switcher if you need to adjust the lexicon for a specific region within your organization.
4. Type the word in the **Custom** text box.
5. Select **Classify** to put the keyword into an existing classification (set of related words), such as 'Profanity', or add a new classification name by typing the classification in the text box and selecting **Add.**
6. Select the option you'd like: Exact match, Starts with, or Boolean (e.g. Hearsay AND Social, Hearsay AND NOT Social).
7. Click **Add**.
8. At the bottom of the page, make sure **Custom Keywords** is set to **Enabled**. And below, Hearsay recommends to keep **Display Lexicon Violations** set to **Enabled**, in order to properly guide and educate your end-users.

Now, when an end-user includes a lexicon keyword in their writing, Hearsay will prevent the activity and guide them toward resolution.

To delete a Keyword:

1. Select **Settings** > **Organization Settings**
2. Click **Lexicon**.
3. Select the 'x' on the right side of the keyword you wish to delete in the Keyword list.
   Note: Selecting the 'x' immediately deletes that keyword from the list.

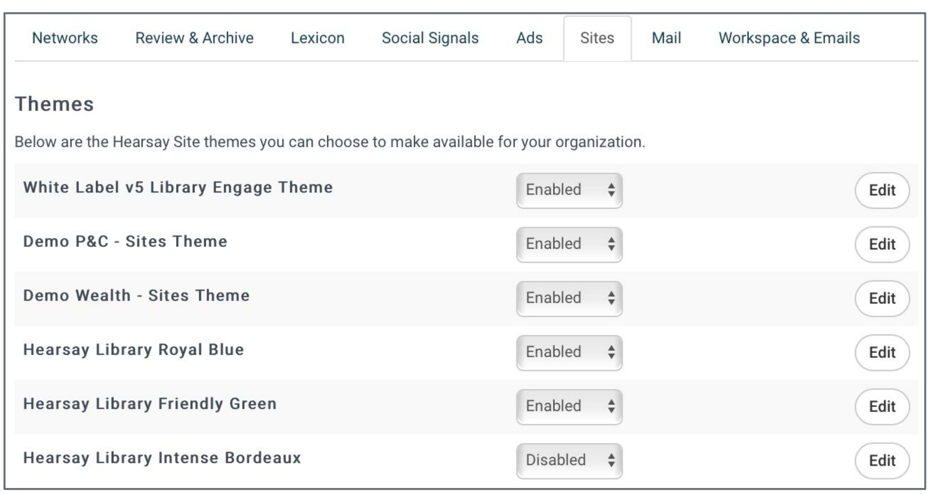
To manage Keyword Classifications:

1. Select **Settings** > **Organization Settings**
2. Click **Lexicon**.
3. Click **Manage Classifications.**
4. To add a new classification, type the new classification in the text box.
5. Select **Add.**
6. To delete an existing classification, select the 'x' located on the right side of the classification you wish to delete.
7. Select **Yes** in the Warning pop-up box.
   Note: The keywords associated with that classification are also be deleted upon selecting Yes.

To download a list of your organization's keywords to a .CSV file, select **Download Keywords**.

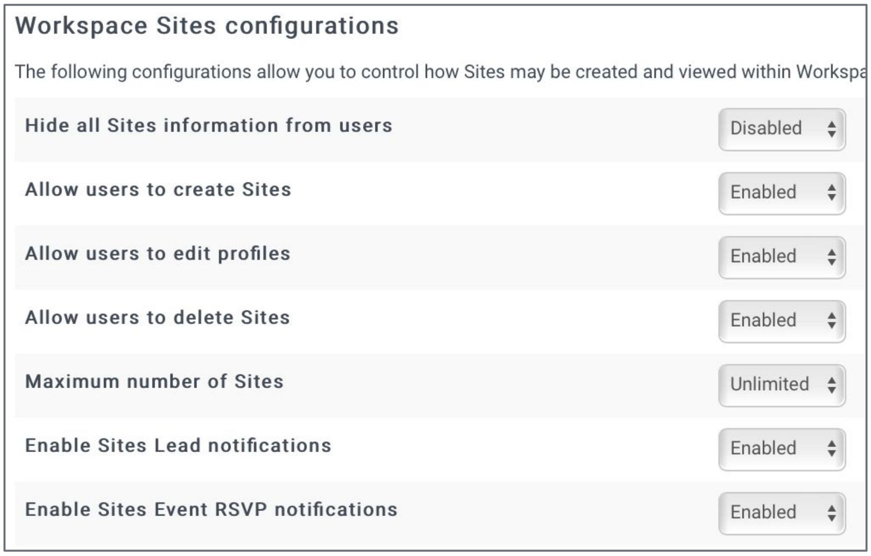
Sites Tab

Choose from a list of themes to make available for your organization.



Sites Tab (continued)

Configure how Sites may be created and viewed within Workspaces.



Workspace & Emails Tab

The **Workspace & Emails Tab** allows admins to configure several features pertaining to your workspaces and customize which emails users will receive from Hearsay.

Workspace Settings

- Allow workspace owners/members to invite staff/assistants into their workspace
- Allow workspace owners and members to select the language of email invitations
- Allow users to create original content that includes multiple photos in the post
- Enable Facebook targeting for your users
- Allow users to create video posts
- Hide content creator’s name

Email Settings - Admins can enable/disable the following:

- Account Notifications
- Friendly Reminders
- Onboarding
- Daily Admin Emails

Setting Overrides

Settings > **Setting Overrides** will show you all of the settings that have been overridden by request by your organization. If you need to adjust any overrides or you need one created, please reach out to your Customer Success Manager or support@hearsaysystems.com.

Queues

Hearsay allows you to set up Approval Queues to manage your compliance review process more effectively. Once you have defined a set of Queues that fits your review process, you can assign Administrators to their appropriate Queues. You can manually assign content/infractions to any Queue so the correct Administrators are reviewing the correct content/infractions.

To organize and make changes to your organization's routing process for compliance review, select **Settings** > **Queues**.

To manually assign an item to a queue, click **Assign** while viewing the item and select the queue from the dropdown that appears.

Content Tags

Content tags organize suggested content into categories. Tags help make the type of content users are looking for more easily accessible, and allow Admins to more easily review what type of content is used most or performing best.

Each content item that you suggest into your Content Library can have multiple Content Tags associated with it (e.g. "Holiday" and "Promotions"). You can always edit your Content Tags as time goes on, but we generally recommend maintaining around 10-20 Content Tags. If you have too many tags, the Content Library can get cluttered for users.

Here are some common Content Tags ideas to help you get started:

Industry News	Purpose-Driven
Company News	Advisor Spotlights
Holiday/Seasonal	Company Initiative
Community Events	Product/Service-Specific

To create and edit a tag:

1. Go to **Settings** > **Content Tags**.
2. Type a new tag and click **Add.**
3. To edit a tag, select the pencil icon to the right of the tag.
4. To remove a tag, select the 'X' to the right of the tag.

URL Shortening

Hearsay supports an integration with Bitly, a software that automatically shortens links and provides link engagement data for admins. Once integrated, link-type posts suggested to the content library will automatically convert to bit.ly URLs when users publish the posts to social media, allowing you to leverage the Analytics dashboard in your bit.ly account to track additional metrics like click-through rates on your library content.

Admins can also use this to compare how URLs perform across different parts of an organization (as reflected in your organization's Hearsay Social hierarchy). To enable this feature, please work with your Implementation Manager to get the appropriate configurations enabled. Once this feature is enabled, you can shorten your links (URLs), control your brand and capture your data all by connecting your bitly account to Hearsay Social. **Note**: If the account of the admin who connected the Bitly account to Hearsay is deactivated, the Bitly account will need to be reconnected.

Connecting bitly with Hearsay

For the entire organization:

1. Select **Settings** > **URL Shortening**.
2. Click **Connect bitly Account**.
3. Follow the remaining prompts.

For a specific region:

1. Follow the above 1-3 steps.
2. Email support@hearsaysystems.com requesting regional configuration for the bitly account. Please include:
   - The name of the Bitly account
   - The region to which it needs to be mapped

Configuring in Bitly

Set default group:

1. Log in to Bitly.
2. Select the drop down by their profile (top right).
3. Select Profile Settings.
4. Select Default API Group.
5. Select the name associated with the group they would like our API integration to use.

Set default domain:

1. Log in to Bitly.
2. Select the drop down by their profile (top right).
3. Select group settings.
4. Select Domain default.
5. Select the domain they would like our API integration to use.

Integrations

You can manage the API tokens that are used to access the Hearsay Social API. To view the Developer API page and display any API tokens you have created or to generate a new API token, select **Settings** > **Integrations**.

Follow the steps below to generate a new API token.

1. Select **Settings** > **Integrations**.
2. Select the **Generate Token** button in the top right corner above the list of API tokens.
3. Add a description of the API token, if necessary.
4. Click **Generate**.

To deactivate an API token, select the pencil icon next to the token you wish to deactivate and click the **Deactivate** button.

To display a current API token, select the pencil icon next to the token you wish to view and click the **View** button.

API tokens should never be communicated via unsecure channels. This includes, but is not limited to the following: email, instant messaging services (i.e. slack), screen share services (i.e. GoToMeeting, Zoom, WebEx), file hosting services (i.e. Dropbox or Google Drive, or via any Microsoft document (i.e. Word, Excel, PowerPoint). Please work with your Hearsay Implementation team to securely transfer this information.

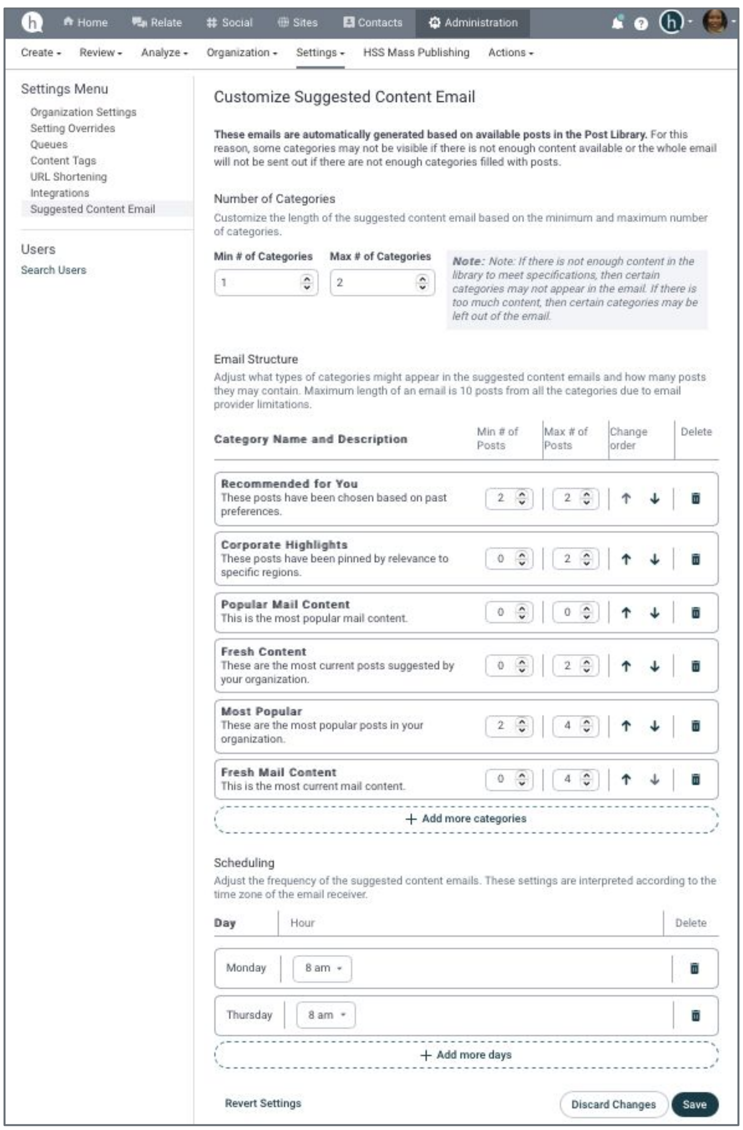
In the event a token is communicated via an unsecure channel, Hearsay policy requires the token be promptly deactivated. Should this occur, you will be notified of the deactivation and will be required to generate a new token using the steps above.

For detailed information on APIs in Hearsay Social, refer to the API documentation on Hearsay Developer Reference (password: HearsayDocs).

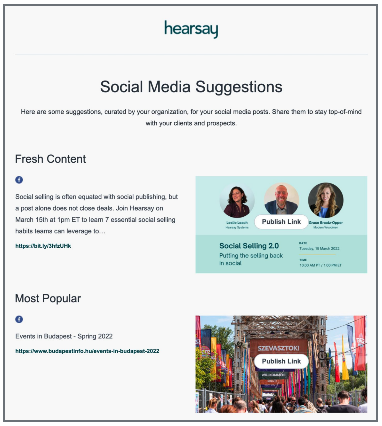
Suggested Content Email

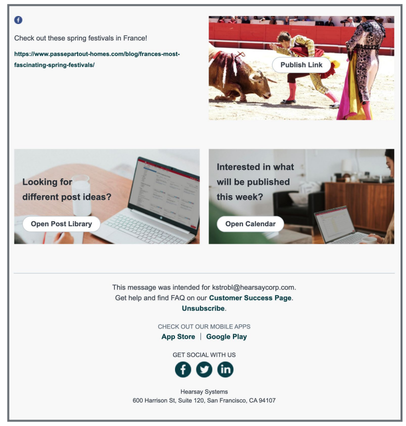
The Suggested Content email that advisors and agents receive has a section dedicated to content from the Content Library that is personalized for each specific workspace. Admins have the capability to manage the Suggested Content Email in the Settings Menu. There, you can find a feature called **Customize Suggested Content Email**, which enables the following:

- Customizing the length of the Suggested Content Email
- Adjusting the post categories (e.g. Fresh Content, Most Popular Content, Corporate Highlights, etc) included in the email and their preferred appearance order
- Defining the preferred number of posts per categories
- Adjusting the sending frequency of the emails
- Reverting back to the system default logic of the Suggested Content Email content and sending frequency



There are direct navigation links to the Post Library and user's Calendar pages in Hearsay Social. In addition, individual pieces of content have visual indicators of the social channels they can be published to and modification rule-related tags are also displayed. The email is also responsive to different screen sizes. Receivers are able to unsubscribe from this email via a link included in the email.





Configuration Rules

Admins are allowed to customize the Suggested Content Email only on the organizational level. This is due to the fact that a Workspace can belong to multiple hierarchies.

As with the system default configuration of the Suggested Content Email, the content displayed in the email is unique to the Workspace and is comprised of content that is available in the Workspace's library at the time the email is generated. This means that each email can be different for each Workspace even when the admin is configuring the email content.

The Workspace is able to control the receiving schedule or unsubscribe from the email in their respective User Settings. This setting is always ranking first when compared to the admin-created configuration.

Default Configuration of the Suggested Content Email

An organization doesn't have to customize their Suggested Content Email unless they want to.

If the org does NOT want to customize the email:

- They should not make or save any changes on the Customize Suggested Content Email feature
- In this case, the system defaults to the standard email sending logic

Default Suggested Content Emails can include the following content:

Pinned Posts ("Corporate Highlights")
These are items pinned by admins for specific regions. In an effort to get the most applicable content for the Workspace, we look for content that was suggested explicitly to the Workspace's leaf districts, sorted by the suggestion time. Then we walk up the hierarchy for each leaf district, we're looking for content at each level until we have enough content. We look for content suggested at the root district as the last resort.
Min # of posts: 1
Max # of posts: 2

Personalized Posts ("Recommended for You")
This section only appears if the feature flag is enabled. The posts in this section come from our machine learning based on the workspace's previously posts and what content they're likely to want to post next.

Recent Posts ("Fresh Content")
Shows the most recent suggested posts since the last Suggested Content Email was sent to the user, or within the last month (if the user has never received the email). These should be the same items as at the top of the content Suggested Content Library when "Recent" is selected. Items in previous sections will never be duplicated, so these may not be the most recent (e.g. if they were pinned), but the next items in recent order.
Min # of posts: 1
Max # of posts: 2

Popular Posts ("Most Popular")
This section is optional - it will only be included if one of the previous sections is not included. Shows the most popular items posted by other Workspaces in the organization during the last 6 months. Items in previous sections will never be duplicated in this section, so these may not be the actual top #1 and #2 items, but lower down the list cause the high ranked items might be in previous sections.
Min # of posts: 2
Max # of posts: 2

Controlling Content

Setting the Number of Categories

The length of the Suggested Content Email can be customized by setting the minimum and maximum number of categories (e.g., Corporate Highlights, Fresh Content, Most Popular...) appearing the email.

This setting is important because in cases in which there is not enough new content in the Suggested Content Library, then certain categories may not appear in the email. It can also be that there is too much new content, then certain categories may be left out.

Setting the Email Structure

This section allows to manage the category types appearing in the email, and how many posts each selected category may contain.

The categories are:

- Corporate Highlights (Pinned Posts)
- Recommended for You (Personalized Posts)
- Fresh Content
- Most Popular
- Most Engaging

These are the same categories which can appear in the system default configuration of the Suggested Content Email with the exception of the new category "Most Engaging," which can only be added into the email on this feature.

The admin is able to adjust the order the categories are checked by the algorithm, which determines the order they appear in the Suggested Content Email. This is dependent on having enough new Suggested Content available since the last generation and sending of the email.

It is also possible to add or delete categories, and adjust the length of an individual category section by defining the minimum and maximum number of posts each category may contain. This latter part again depends on the new available Suggested Content.

Scheduling

The sending frequency of the Suggested Content Email can be managed in the Scheduling section of the feature. The admin can add or delete days and choose any full hour per day for the sending.

The system interprets the settings according to the timezone of the Workspace.

Discard Changes and Revert Settings

- Clicking on ‘Discard Changes’ resets the Suggested Content Email configuration to the last saved config.
- Clicking on ‘Revert Settings’ resets the Suggested Content Email configuration to the system default configuration of the email sending

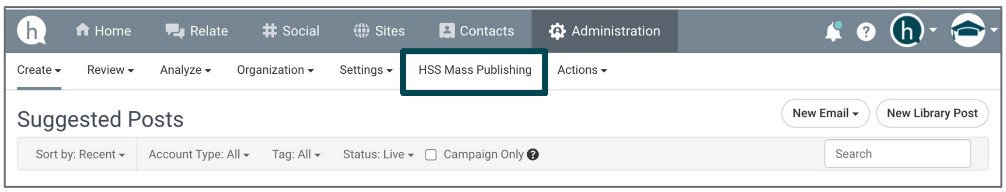
HSS Mass Publishing Tab

Mass Publishing allows admins to publish a post to ALL WEBSITES within their organization. The function bypasses the content library and publishes directly to every website. The post will be displayed under the News page on every website. New posts are displayed at the top and start from left to right while the older ones are displayed further down the page. Admins also have the ability to delete any mass-published corporate post from all websites.

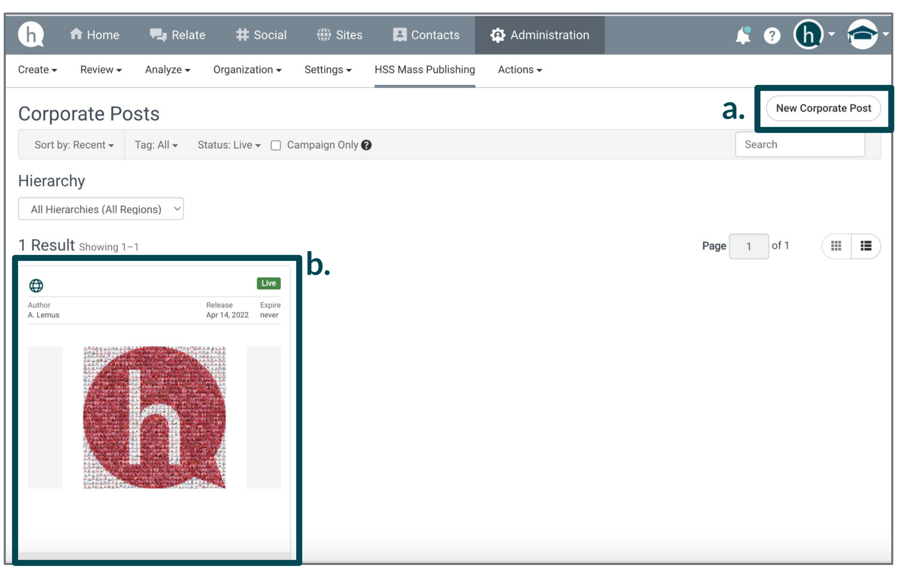
Create and Mass-Publish a Corporate Post to Multiple Sites

To create a mass-publish post to share to all advisor sites:

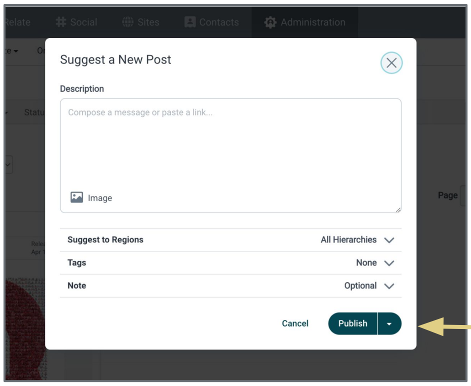
1. Select the HSS Mass Publishing Tab on the Navigation Bar.



2. On the Corporate Posts Page, create a post or select an existing post:
   a. To publish a new post: Select the New Corporate Post Button in the top right corner of the Corporate Posts Page. Create the post using the Publisher Tool.
   b. To publish an existing post: Click on the summary card to open and edit an existing Post.



3. In the publisher, select the **Suggest to Regions** section to select the regions in which you want the Post to be published. By default, All Regions is selected.



4. When complete, select the Publish button. You will receive a confirmation message.

Verify that a Mass-Published Post was Published

To review a site to confirm the mass-publish post was shared:

1. Enter the Hearsay Site URL into your preferred web browser's address bar.
2. Press the Enter or Return key.
3. Verify that the Post you mass published is displayed and available on the Hearsay Site.

Note: If the Post is missing or not accessible on the Hearsay Site, contact support@hearsaysocial.com.

Delete a Mass-Published Corporate Post

To delete a mass-published corporate post:

1. Select the HSS Mass Publishing Tab on the Navigation Bar.
2. Select the Post to be deleted.
   Note: Select the **Suggest To** section to remove regions or only select certain regions in which to delete the Post.
3. Select the Delete Button in the bottom right corner.
4. Select OK in the Confirmation Pop-Up Box. You will receive a confirmation message letting you know the Post has been deleted.

Verify that a Mass-Published Post was Deleted from the Hearsay Sites

After deleting a mass-published post, you can verify it was deleted by:

1. Entering the Hearsay Site URL into your preferred Web browser's address bar.
2. Pressing the Enter or Return key.
3. Verifying that the mass published Post is not displayed on the Hearsay Site.

Additional Admin Features

URL Translation, Advisor Attribution and Dynamic URLs

URL Attribution
Hearsay URL Attribution enables your company to dynamically customize the URLs of shared social content. By leveraging this feature, your business can improve the measure of ROI on its social program and direct user traffic from shared posts in a more meaningful way.

The Suggested Content ID Urchin Tracking Module tag, or UTM for short, enables you to track which content from your organization's suggested content library is receiving the most clicks and engagements on social media, as well as track which network the content was viewed on and which user and workspace within your organization published it.

This is achieved by configuring a set of rules that modify URLs based on specific domains identified by an organization. Once Hearsay receives the destination domain addresses, it appends UTM tags and creates rules based on the referral sources an organization would like to capture. When content is suggested in Hearsay from an admin to end-user group, it pulls metadata in Hearsay related to each end user's workspace and appends it to the URL when it gets published. The result is that specific variable information is tracked and collected when a viewer clicks the link.

For example:

- If the domain name was HearsaySystems.com, Hearsay would automatically add the UTM tag for the Reference ID into the URL. This workflow allows the end-user to be attributed to the link, allowing admins to understand where traffic to the URL originated from.
- In this example, if individual end users Josh and Louis both share the post from their workspace, their attribution would be added to the link. Therefore, if Louis's link receives more attention and clicks than Josh's, their admin teams will be able to track where the success came from.

URL Translation and Advisor Attribution

By using URL Translation, Advisor Attribution allows you to add tracking parameters or manipulate a URL based on a set of rules. As an example, let's say we were a business called Taurus Financial Services, and we owned taurus.com. One URL Translation rule could be - whenever taurus.com is in a piece of content in the Social Content Library or in an email template add a tracking code of **?publishedFromHearsay=true**. This would allow us to track referral traffic generated from our advisors' social posts and emails.

The key requirement to URL attribution is that URLs must include **http** or **https**. The URL Translation rule makes this possible. For example, **www.taurus.com** would not have the URL Translation rule applied to it, but **https://www.taurus.com** would.

Within Hearsay's internal system, Hearsay can configure a set of rules that modifies URLs based on specific domains. As an example, if the domain name was HearsaySystems.com, Hearsay will automatically add the following code within the URL "**add ?advisor_id={workspace_id})**." This workflow allows the advisor to be attributed to this action, allowing admins to understand where traffic to the URL originated from.

Some common use cases for this are:

- Add tracking codes to a URL to know which network or source the client is coming from
- Add the reference ID, or workspace ID, to a URL to track which advisor drove a client to the business

Benefits:

- Track referral traffic sent to corporate websites from your social, sites, and mail content
- Give advisors credit for the traffic/leads they refer to corporate
- Effective way to show the ROI of your program

Advisor Attribution appends specific code to the end of pre-determined URL domains and is applicable for both Suggested Content within Hearsay Social. The result is that specific variable information is tracked and collected when a viewer clicks the link, including:

Suggested Content ID	Track which content from your suggested content library is receiving the most clicks.
Social Network	Track which network the content was viewed on.
Reference ID	Track the reference ID of the user within Hearsay who used referred the link.
Group ID	Track the workspace within Hearsay from which the link was referred from.

The key requirement is that the URL must include http or https. To enable this feature, please consult your CSM contact at Hearsay for assistance with Solution Delivery Implementation.

Examples include:

- If the domain is '**http://hearsaysystems.com**', add '**?scid={suggested_content_id}**' to the end of the URL
- If the domain is '**http://hearsaysystems.com**', add '**?refid={reference_id}**' to the end of the URL
- If the domain is '**http://hearsaysystems.com**', add '**?sn={social_network}**' to the end of the URL
- If the domain is '**http://hearsaysystems.com**', add '**?reference_id={group_id}**' to the end of the URL

Dynamic URLs

If you do not wish to use this feature for all links across the specific domain, you have the option to access Dynamic URLs that can be used on a content-by-content basis.

With Dynamic URLs, admins can create templated content that automatically personalizes and links back to your advisors' websites when published, encouraging prospects and customers to interact with the advisor's website on a more frequent basis. Therefore, admins can create a single post that is personalized automatically for each and every one of their advisors and agents.

Whether your goal is to encourage customers to fill out a lead-form, request an appointment, or register for an event, Dynamic URLs help your organization drive clicks back to your advisor's websites without adding any steps to how they publish content from Hearsay, making the experience seamless for both the end-user and admin who created the post.

Dynamic URLs can be applied to various types of Hearsay posts. As a Hearsay admin, you can create a new post within the Suggested Content Library as well as edit existing library posts to apply Dynamic URLs. You can also create a new campaign or edit an existing campaign to apply Dynamic URLs to the campaign content as well.

With help from Hearsay's Professional Services team, your organization will be set up properly via the the following steps:

1. An organization defines the websites they are looking to redirect traffic to and extracts the variable part of the URL for each workspace. Here's an example: https://advisor.hearsay.com/{site.url}
2. Hearsay will update our back-end system with this data so that the variable part of the URL maps to content when shared from a specific workspace. Hearsay does this by writing the website variable into each Advisor's Hearsay workspace via API.
3. After this is set up, admins create content in the Suggested Content Library and modify the variable part of the URL so it uses the advisor website slug.

With that completed, let's review how an admin would create a piece of Hearsay Content and apply a Dynamic URL to it:

1. Navigate to **Create** > **Suggested Posts** and select the **New Library Post** button on the top right part of the screen.
2. In the publishing window, enter in a URL into the text box. Depending on your use case, this could be your corporate site, a general intake form, or a "find an advisor" page.
3. Your URL will generate a summary card, complete with image, headline and brief description. And below, in the Workspace Specific Link section is where you can include the Dynamic URL. In this example, it is https://advisor.hearsay.com/{site_url} . The end result is that regardless of which user or workspace shares this post, the Dynamic URL will adapt the Master URL to include information related to the end-user who shared the post, thus, directing the prospect or customer directly to the advisor's personal website.
4. Finalize your post details by adding other important information to your post such as which social networks the post can be published to, when the post will become available in your end-user's library, and more.
5. Once finished, click **Suggest**.

With this workflow, admins can create universal content which will be personalized for the end-user who shares the post. Thus, when end-user's shares this post, the link will redirect to the advisor's website when published from the suggested content library or a Hearsay campaign.

If you are interested in applying Dynamic URLs to Hearsay content, identify the websites you would like to redirect traffic to, and contact your Customer Success Manager to help you get started.

Admin Best Practices

Marking Admin Best Practices

- Create modifiable content that prompts end-users to ask questions and share personal stories.
- Use Suggested Profile fields to get profiles into an approved status faster.
- Run reports every couple of weeks to understand post performance, engagement metrics and track program adoption.

Compliance Admin Best Practices

- Save your searches as you filter through your Supervision Queue to streamline workflows.
- Manage your queue regularly, spend 15 minutes twice a week responding to alerts and approval requests.
- Manage your Lexicon by first enabling alerts for profanity, phone numbers and social security numbers and then add custom keywords to your Lexicon.

Find out how Hearsay can help your advisors and agents, contact us at:

VISIT hearsaysystems.com

EMAIL contact@hearsaysystems.com

CALL +1 415-373-0673
+1 844-556-4396

ABOUT HEARSAY SYSTEMS

Hearsay Systems is reinventing the human-client experience in financial services. The Hearsay Client Engagement Platform empowers over 200,000 advisors and agents to authentically and intelligently grow business relationships by proactively guiding and capturing the last mile of digital communications. The world's leading financial firms—including New York Life, Morgan Stanley, Charles Schwab, and Ameriprise—rely on Hearsay's SaaS platform to scale their reach, optimize sales engagements, and deliver exceptional client service in a consistent and compliant manner. Hearsay is headquartered in San Francisco, with globally distributed teams throughout North America, Europe and Asia.

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