

hearsay

Hearsay Relate User Guide



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

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

Product Overview

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

KEY FEATURES

Some of the high level capabilities of Hearsay Relate are:

- Text Messages
- Broadcast Messages
- Scheduling Texts and Reminders
- Scheduling Meetings
- On-Demand Links
- VOIP Inbound Calling
- VOIP Outbound Calling
- Contacts
- Account Settings

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HELP CENTER

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

Growing and maintaining your business with texting and voice involves:

- Connecting with your clients via Text & Voice
- Setting up Regular Touch Points with Clients
- Configuring your Relate Account Settings
- Leveraging your Team with Delegation
- Using Administration & Security for Relate

Each of the sections below will help you get started with the fundamentals of managing your texting and voice efforts.

Connecting with Your Clients via Text & Voice

Connecting with your clients via text is a great way to open up a channel that is direct, intimate and has the fastest response time (compared to other communication channels like email).

Texting is a compliance-driven channel where attestation (consent) from the client to receive texts from a Hearsay Relate number is a critical step in the process. You can find more details on your org's methods of connecting with clients via texting leveraging attestation by connecting with your compliance admins.

Voice is another great channel to connect with clients—jumping on the phone to touch base or to establish next steps is helpful to ensure forward progress with a client.

Set Up Regular Touchpoints with Clients

Client engagement can be boosted through regular touch points. Hearsay Relate enables you to proactively reach out to clients via text and voice, ensuring that the client feels that you are looking out for them and that they are involved.

Configure Your Relate Account Settings

Hearsay Relate is configurable to how an office needs to operate. Our goal is to provide workspaces with the ability to ensure that your clients have the best experience while setting boundaries for texts that come in after hours (set working hours & auto reply text), or how a call should be directed (inbound call handling).

Leverage Your Team - Delegation

Hearsay Relate isn't just about you; it is about how you AND your team can provide clients with the best experience and engagement opportunities. You can invite delegates to your workspace so they can support your communications and client relationships.

Administration & Security for Hearsay Relate

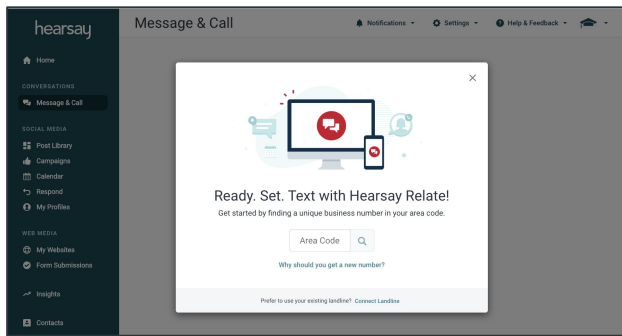
With Hearsay Relate, we know that there are many activities that need to be monitored for compliance purposes. Hearsay Relate allows your compliance admins to monitor texts. We have also created biometric and PIN security measures to restrict mobile access on Hearsay Relate.

Getting Started

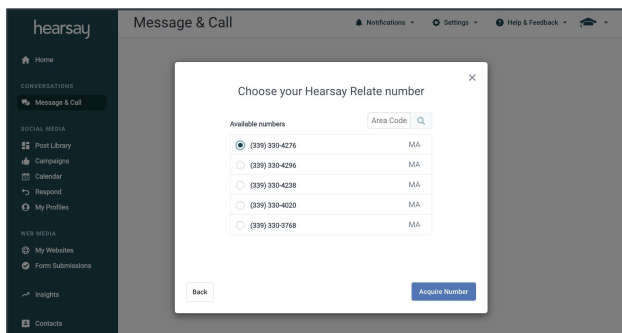
Create a Hearsay Relate Number Using a Desktop Computer

To create a Hearsay Relate dedicated number:

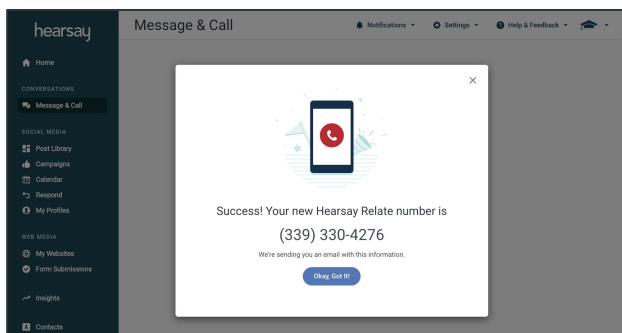
1. Log into your Hearsay workspace and click **Message & Call** from your side navigation bar.
2. Type in the 3-digit area code and click the Magnifying Glass to search for available local numbers.



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



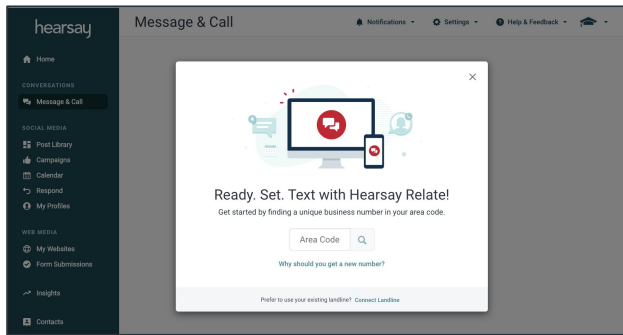
4. Click **Okay! Got It.** to complete the process. You will receive an email from support@hearsaysystems.com with your Relate phone number information.



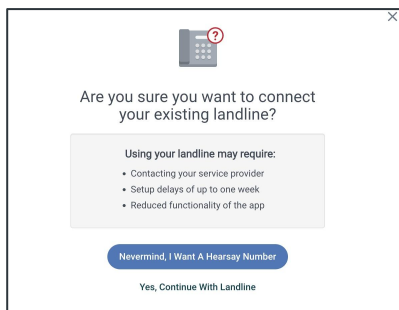
Connect an Existing Landline Using a Desktop Computer

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

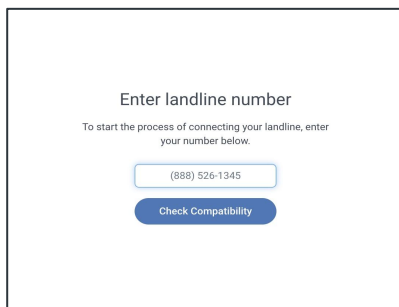
1. Log into your Hearsay workspace and click **Message & Call** from your side navigation bar.
2. Click **Connect Landline** located at the bottom of the pop-up screen.



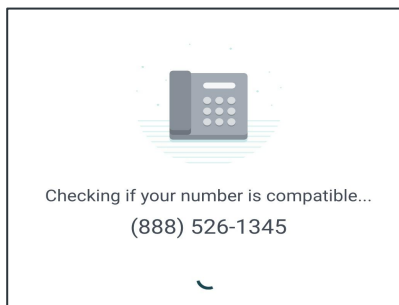
3. Confirm you want to connect your landline by clicking on **Yes, Continue with Landline**.



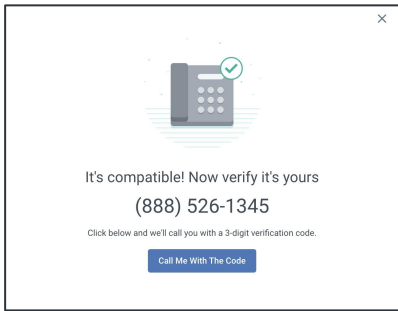
4. Enter your landline number and click **Check Compatibility**.



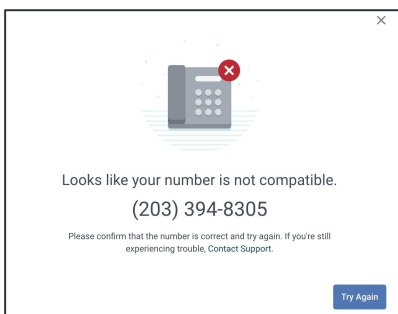
5. Your landline number will be checked for compatibility.



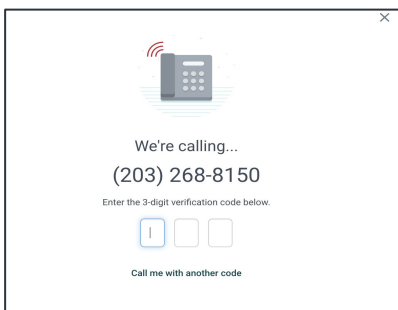
6. If your landline number is compatible, click **Call Me With The Code** to verify your number.



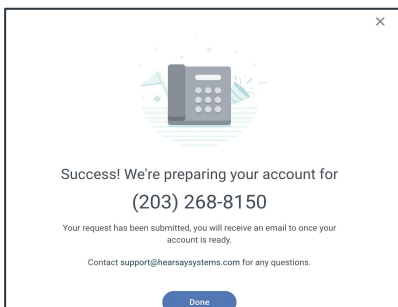
If your landline number is not compatible, you will see a screen to Try Again or to contact Hearsay Support.



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



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

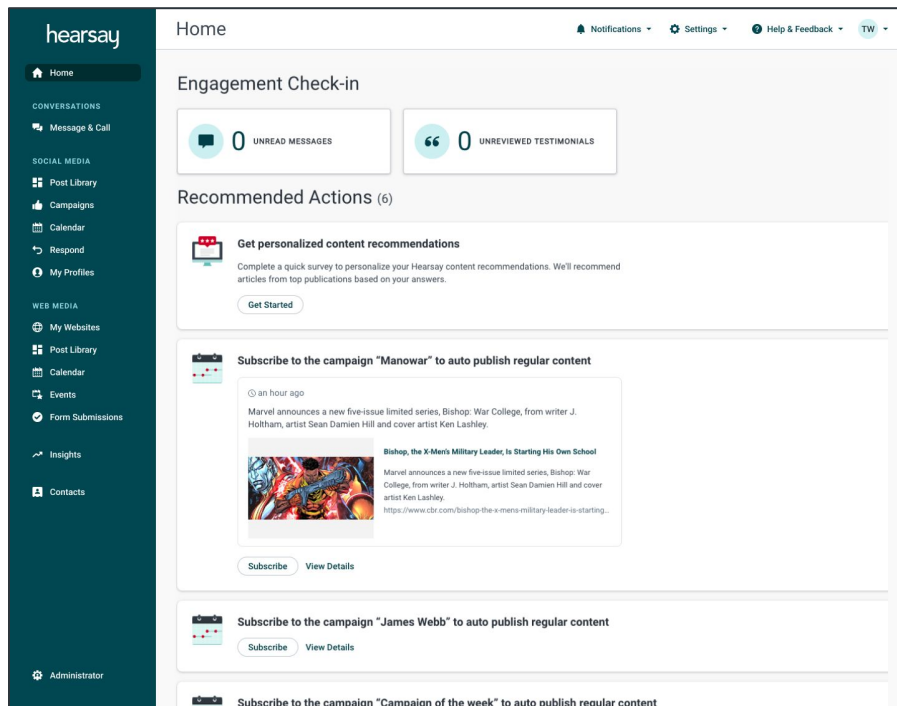


Home Page (for users with Social + Relate)

See Relate Notifications on the Homepage

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

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



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

Contacts

Manage Your Hearsay Contacts

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

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

To add a contact, simply follow these steps:

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

The image shows two parts of the Hearsay Relate interface. On the left is the 'Contacts' tab, and on the right is the 'Add Contact' form.

Contacts Tab: The 'Contacts' tab is selected in the side navigation bar (indicated by a red circle with the number 1). The main content area shows a table of contacts with columns: Name, Phone Number, Email, Contact Type, Lists, and Opt-In Status. A red circle with the number 2 points to the 'Add Contacts' dropdown button in the top right corner of the table.

Add Contact Form: The form is titled 'Add Contact' (indicated by a red circle with the number 3). It contains the following fields:

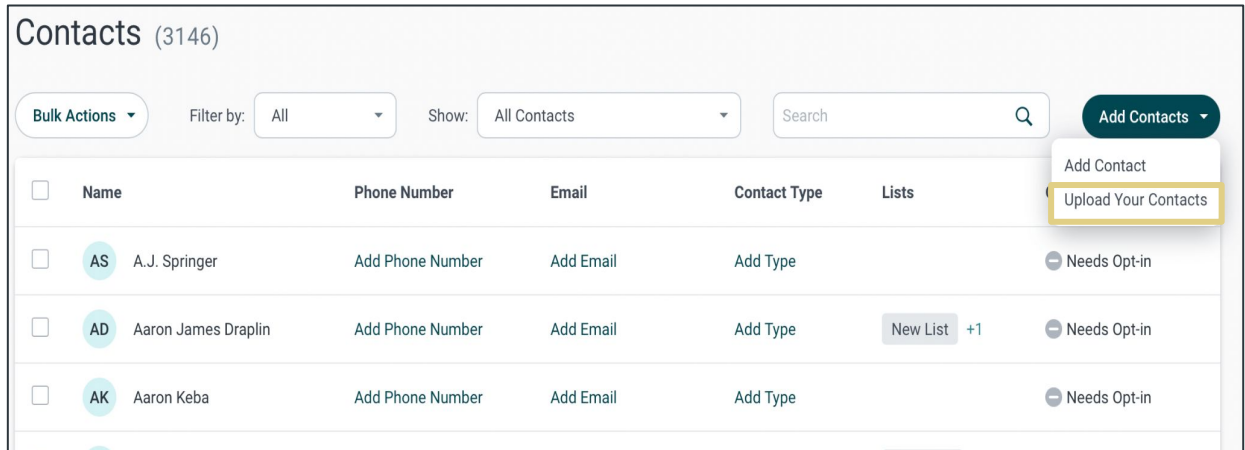
- Engagement Information:**
 - Contact Type:** A dropdown menu with 'None' selected.
 - Language Preference:** A dropdown menu with 'None' selected.
 - Preferred Channel:** A dropdown menu with 'None' selected.
- Personal Information:**
 - First Name *:** A required text input field.
 - Last Name *:** A required text input field.
 - Preferred Name:** An optional text input field.
 - Birthday:** Fields for Month (MM), Day (DD), and Year (YYYY).
- Contact Information:**
 - Phone Number:** A dropdown menu with 'Mobile' selected, followed by a text input field with a placeholder '(999) 999-9999'.
 - Email Address:** A text input field.

At the bottom of the form are three buttons: 'Add Contact', 'Cancel', and 'Help'.

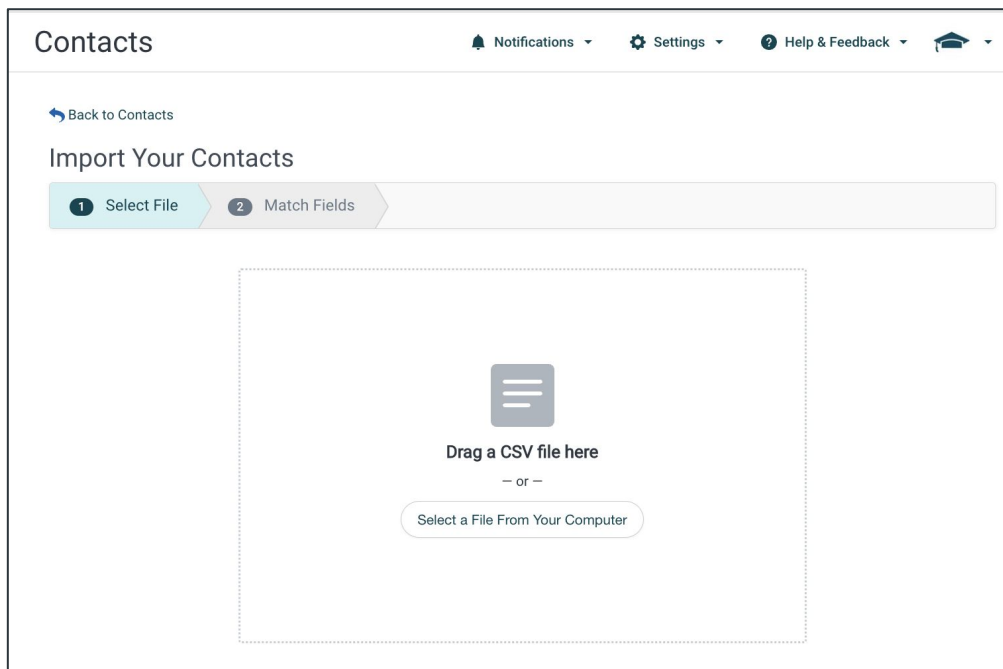
Add Contacts in Bulk

To add contacts in bulk, simply follow these steps:

1. Select the **Contacts** tab on the side navigation bar.
2. Click the **Add Contacts** drop down and choose **Upload Your Contacts**.



3. Click the **Select File** button or drag and drop your contacts file into the panel to the right. This will prompt you to locate a .CSV file on your computer that contains your contact information. The .CSV file must include the following columns: First Name, Last Name, and Phone Number.



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

Back to Contacts

Import Your Contacts

1 Select File 2 Match Fields

Preview your file

Verify that the columns from your file match the Hearsay field.

First Name	Last Name	Email	Phone	Contact Type	Do Not Import
A	B	C	D	E	F
First	Last	email	phone	type	other
Maeybe	Funke	maey@be.com	345-654-45643	nOnE	English
George Michael	Bluth	george@bluth.com			
GOB	Bluth		4578888544		

Previewing the first 3 contacts in your file out of 3 total.

Add to List (Optional)

Select a List New Contact List Create

arrested development

Cancel Submit

5. You will be presented with the **Contact Attestation** popup. If **I Attest** is selected, you will receive the contact import confirmation message.

Contact Attestation

By uploading this file, I attest to the following:

- I have consent to contact the people listed in the file.
- The personal information in the file has not been purchased, rented, or acquired from distribution lists.

Cancel I Attest

Your contact import is being processed. You will receive an email when completed.

Contacts (56)

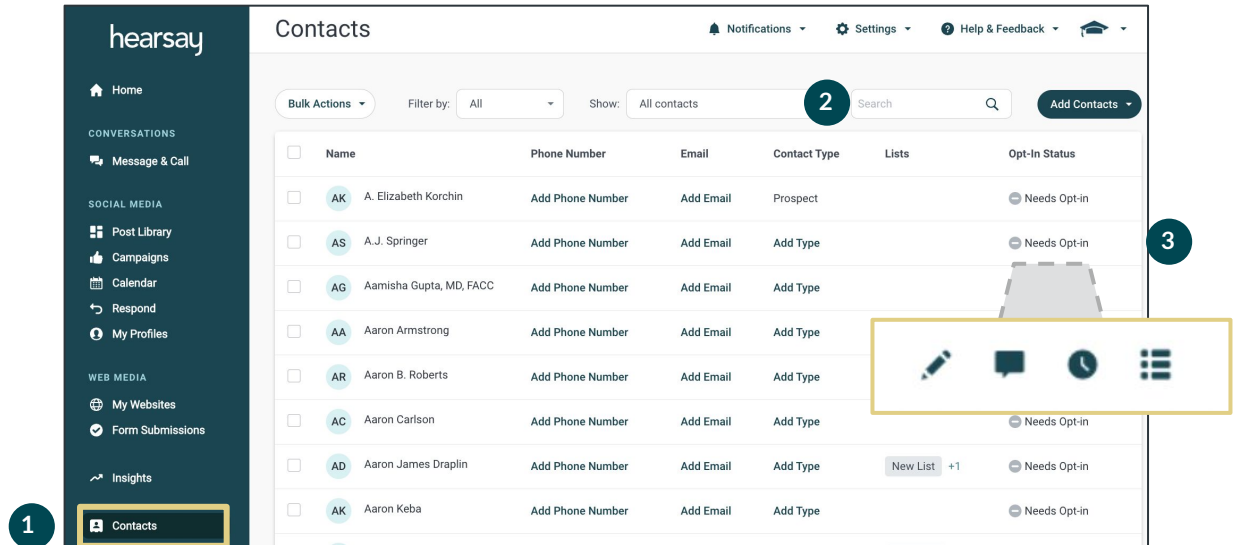
Bulk Actions Filter by: All Show: All Contacts Search Add Contacts

Name	Phone Number	Email	Contact Type	Lists	Opt-In Status
AL Alice Liddell	555-444-3321	alice@wonderland.com	Add Type	alice in wonderland +2	Needs Opt-in

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

Search for Contacts

1. Select the **Contacts** tab on the side navigation bar.
2. In the **Search** box, type the name of the person, then click within the box or press enter.



3. Hover over the Opt-In Status to show the Action icons and click on the desired action.



Edit Contact



New Message*



Schedule a Message*



Add to List

Conversations

Attestation

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

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

Send the Opt-In Attestation Text

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

Send Message

To:

(203) 394-8305

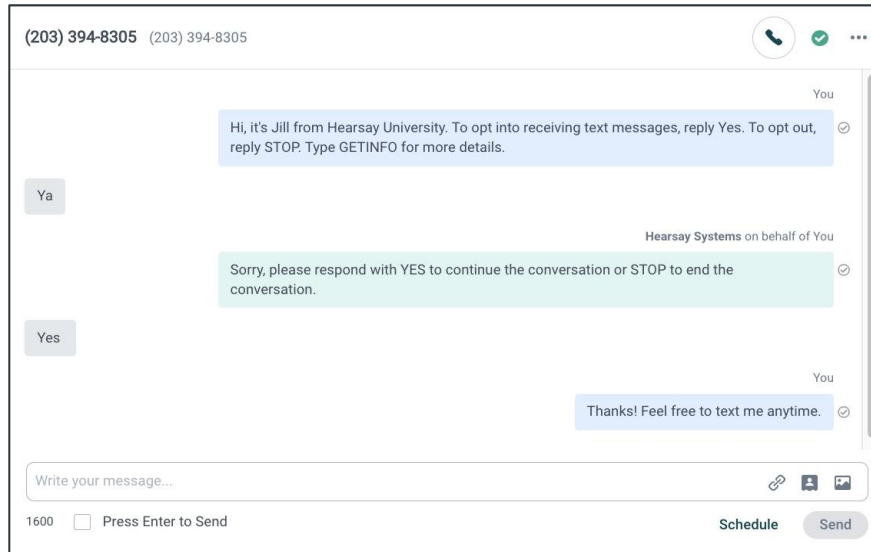
Message:

Hi, it's Jill from Hearsay University. To opt into receiving text messages, reply Yes. To opt out, reply STOP. Type GETINFO for more details.

Cancel Send

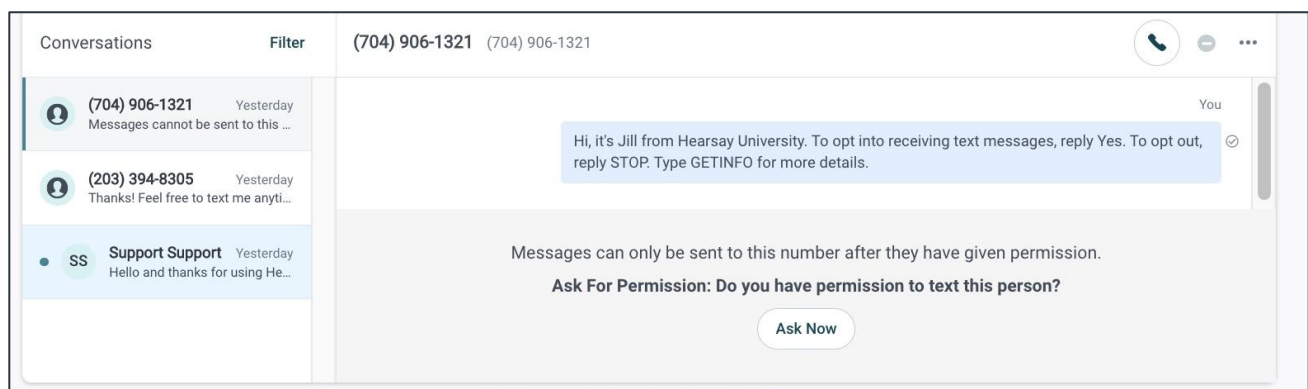
Opt-In Guidance Follow-Up Text

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



Resend the Opt-In Attestation Text

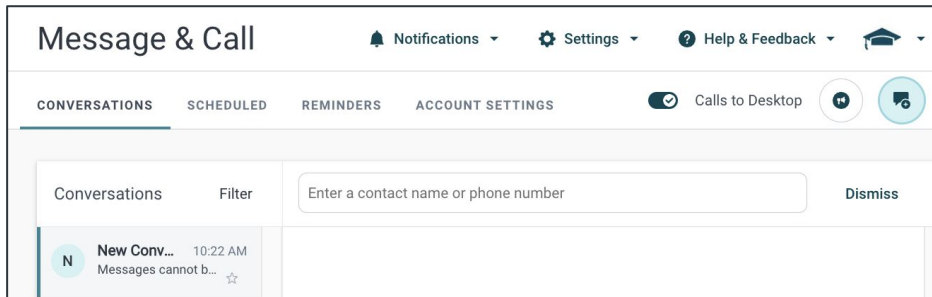
If the contact does not respond for 24 hours, you will be able to re-send the opt-in message up to 5 times total. To resend, locate your contact's conversation and click **Ask Now**. This button will only re-appear once 24 hours have passed since your prior attempt.



Customize the Opt-In Attestation Text

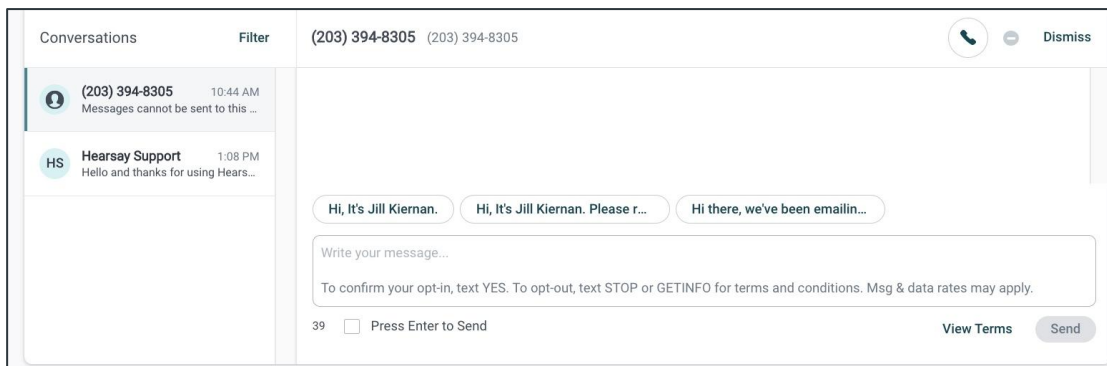
If enabled and approved by your organization, you will have the ability to customize the language included in your Opt-In message:

1. Click the **New Conversation** icon in the top-right corner of your workspace.
2. Type in the name or phone number of the contact you wish to text.

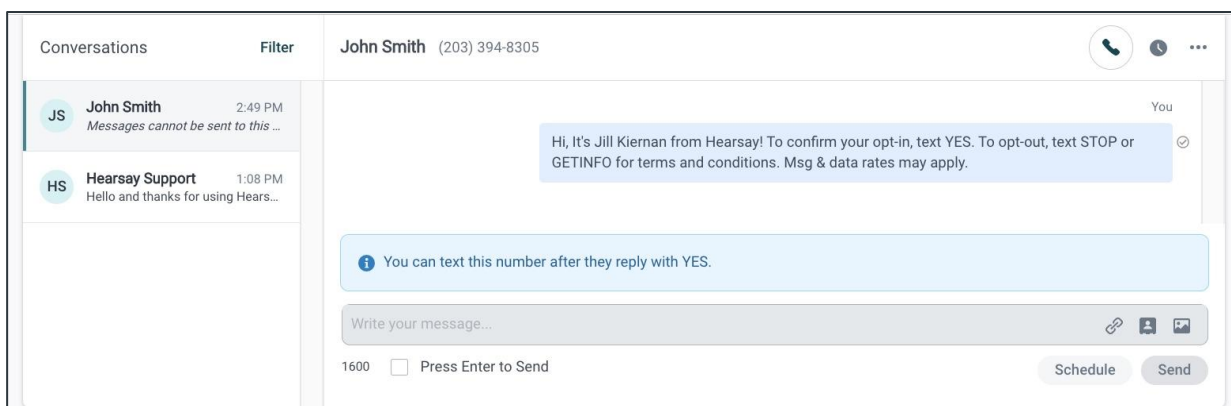


3. You will be presented with the screen shown below. Type in your custom text where it says "Write your message..." to proceed. Once you have typed in your message, click **Send**.

Note: Per compliance rules, the following message will be appended with your text: "Text YES to opt-in, to opt-out text STOP. Type GETINFO for more details."

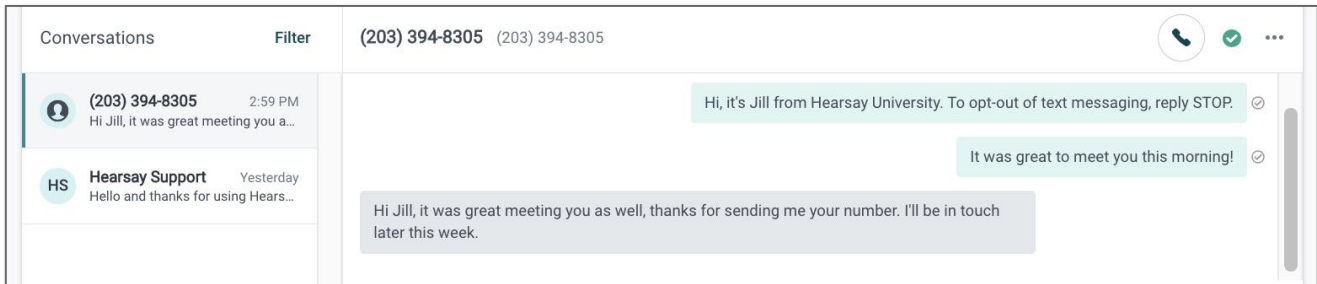


4. Your message will then be combined with your organization's Opt-In requirement, allowing your contact to respond YES once they are ready to text.

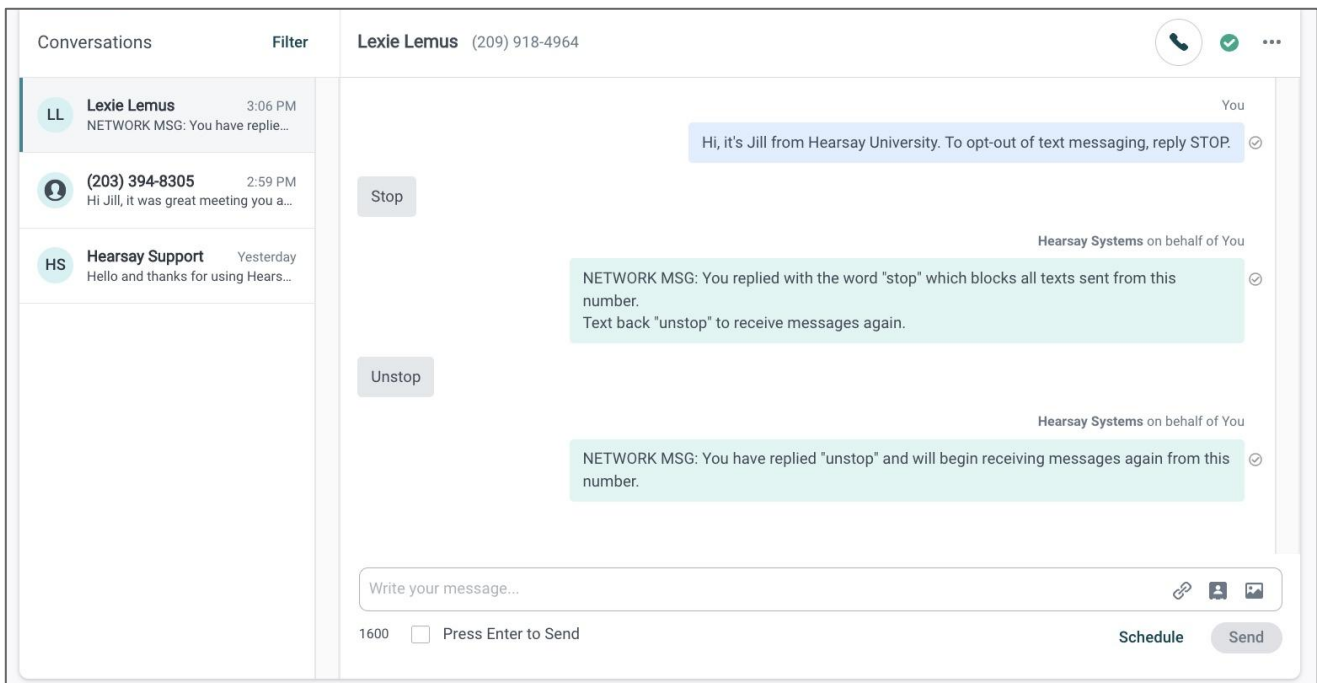


Implied Opt-In

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



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



Opt-In Web Link

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

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

The left screenshot shows the 'Message & Call' interface with the 'ACCOUNT SETTINGS' tab selected. Under the 'Account' section, there is a 'Your Contact Info' box and a 'Share Consent Link' section. The 'Share Consent Link' section includes a link: https://optin.hearsaysocial.com/1340/text_message/phone/+14154621934/ and a 'Copy' button. A red circle with the number 1 is placed over the 'Share Consent Link' text.

The right screenshot shows the 'Opt in for Text Messaging' form. It includes a message: 'Hi, it's Jill from Hearsay University. To opt in, please provide your name and phone number below.' Below this are three input fields: 'First Name', 'Last Name', and 'Mobile Number'. At the bottom, there is a consent statement: 'I consent to allowing Jill Kiernan to send me text messages on behalf of Hearsay University and terms of service.' and an 'Opt In Now' button. A red circle with the number 2 is placed over the 'Opt In Now' button.

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

The screenshot shows the 'Conversations' list on the left with a 'Filter' button. The selected conversation is with 'Zak Fargo (203) 394-8305'. The conversation history shows a message from 'Zak Fargo' at 3:35 PM: 'Hello +12033948305! Thank you ...'. The current message from 'Zak Fargo' is highlighted in yellow and says: 'Zak Fargo: Signed up to receive text messages via Web Form.' The response from 'Hearsay Support' is highlighted in green and says: 'Hello (203) 394-8305 Thank you for opting in for texting with Jill Kiernan at Hearsay University. Text STOP to Opt Out, GET INFO to learn more.'

Send and Schedule Text Messages

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

To send and schedule text messages from your computer:

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

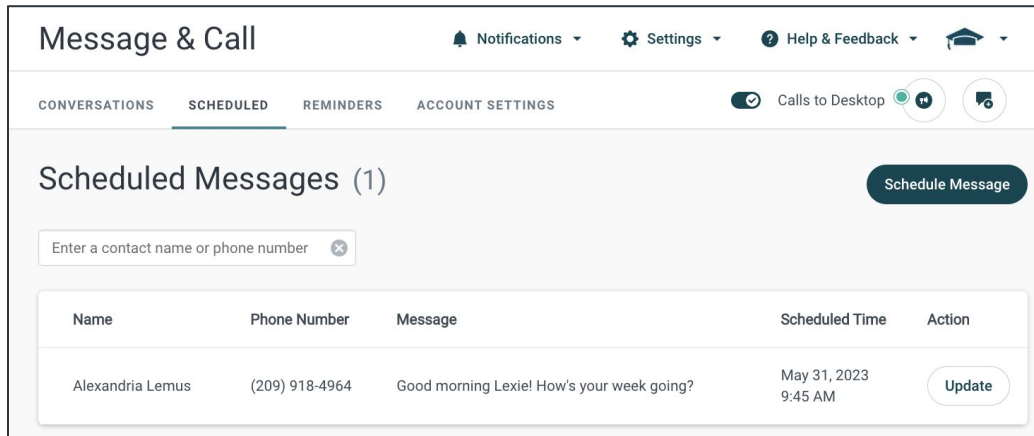
The screenshot shows the bottom of a messaging conversation. At the top is a text input field with the placeholder "Write your message...". To the right of the input are icons for linking, adding a contact, and adding a photo. Below the input field, on the left, is a character count "1600" and a checkbox labeled "Press Enter to Send". On the right are two buttons: "Schedule" and "Send".

Below this is a modal window for scheduling. It has a "To" field with "Zak Fargo" selected. Below that is a "Message" field containing the text "Good morning, Zak! How's your week going?". Under the message field, it says "1559 Characters Remaining". Below that is a "Scheduled Time" section with "Date" and "Time" labels. The date is set to "Wednesday, Apr 06" and the time is "09:45 AM" with a dropdown arrow and "EDT" to its right. At the bottom right of the modal are "Close" and "Schedule" buttons.

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

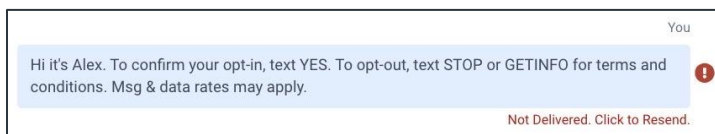
This screenshot shows the same messaging interface as the previous one, but with an additional button in the top right corner of the conversation area labeled "View Scheduled Messages (1)" with an upward-pointing arrow. The rest of the interface, including the text input field and the "Schedule" and "Send" buttons, remains the same.

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

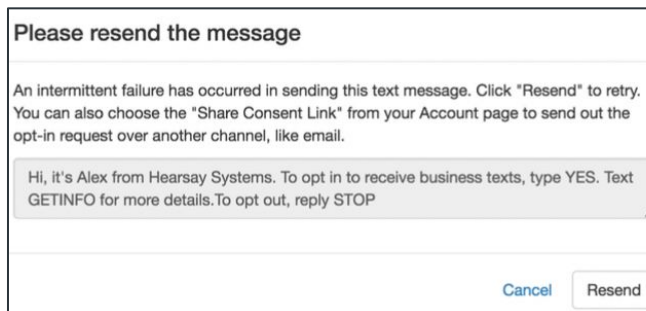


Resend a Text Message

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



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



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

Quick Replies

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

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

To use Quick Replies:

1. Once a response from a contact is received, you can choose from three automatically generated messages.
2. Click on the Quick Reply that you'd like to send.
3. The selected message will appear in the text field. You can edit and customize the text if you'd like.

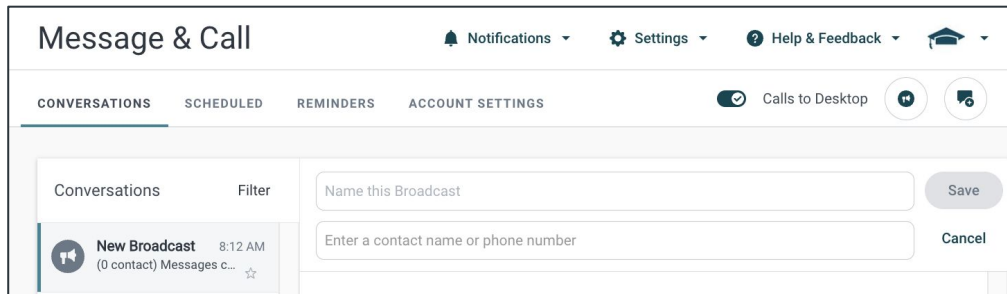
Broadcast Messages

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

- **Wealth Management:** quickly contact your highest net worth clients to reassure them during volatile market movements
- **Life Insurance:** proactively communicating with a list of clients who are due to renew their services on a particular date
- **P&C Insurance:** create a geographical list of clients to notify them of developments in the area, such as weather-related catastrophes you'd like.

To create a broadcast message:

1. Log into Hearsay Relate and click on the megaphone in the top-right corner.
2. Title the Broadcast Message so that you can easily find it when you need it and include the names of the contacts you wish to send the message to.
3. Click **Save**.
4. At the bottom of the screen, type in your broadcast message.
5. Once finished, click **Send**.



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

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

Additional Notes:

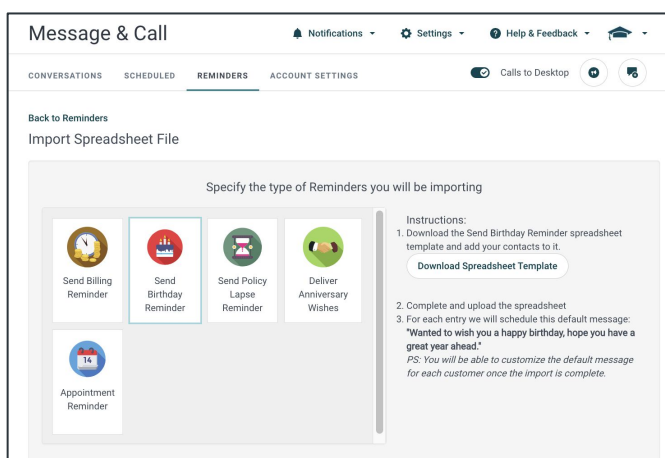
- Users must send their first text via the desktop application. After that, users can send Broadcast messages from either the desktop or mobile application.
- Replies to messages sent with Broadcast lists will never go back to the Broadcast list, but will instead appear as individual 1-1 messages. It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

Reminder Messages

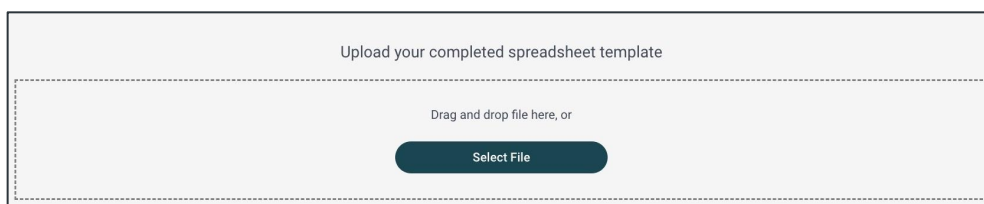
Hearsay Relate Reminders allow you to schedule greetings, birthday wishes and appointment reminders for either a select group of contacts or your entire book of business with just a few clicks. By entering in the appropriate information within a spreadsheet, Hearsay Relate can templatzize important text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

To get started, follow these steps:

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



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

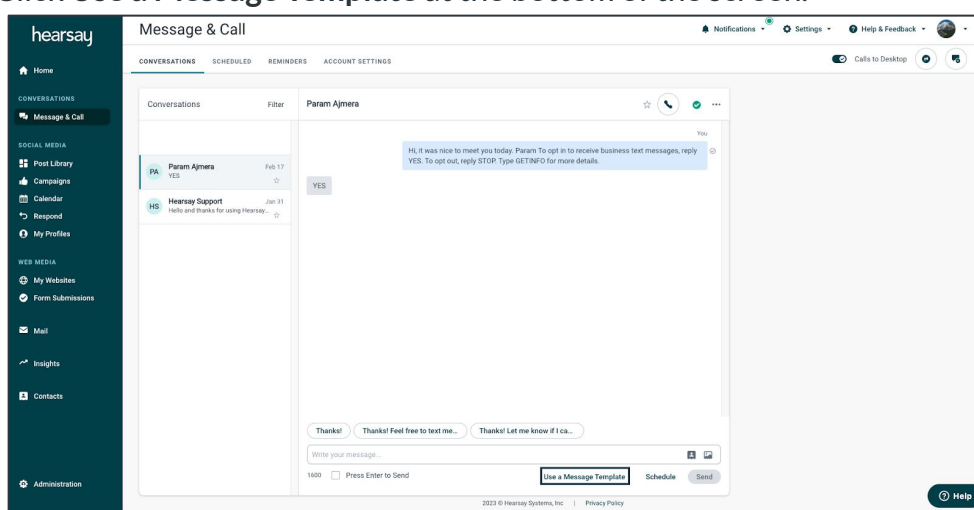


Message Templates

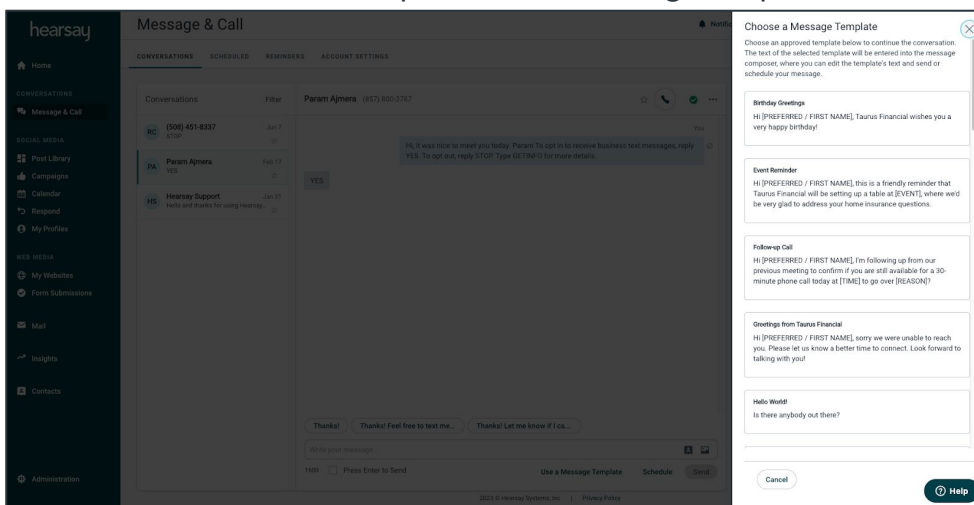
Message templates allow users to save time when sending the same message to different clients. Users can access available templates that your organization has created in the Relate message composer.

All Relate users can access and use text message template by following these steps:

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



4. Choose one of the available options in the message templates drawer.



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

6. Then click **Continue**.

Import Spreadsheet File

Preview your file
You are going to import reminders for **Send Birthday Reminder**. Verify that the columns from your file match the Hearsay field.

First Name	Last Name	Phone	Birthday Date
A	B	C	D
First Name	Last Name	Phone	Birthday Date
Kate	Shaw	508-843-3472	16-Apr
Bill	Grenberg	217-987-9864	7-Jun
Adam	Stats	404-455-2397	6-Aug

Previewing the first 3 contacts in your file out of 3 total.

Continue

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

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

Share your Contact Card in Text Messages

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

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

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

hearsay

Message & Call

CONVERSATIONS SCHEDULED REMINDERS **ACCOUNT SETTINGS**

Account

Your Contact Info

Name Alexandria Lemus

Relate Number (415) 462-1934

Email alemus@hearsaycorp.com

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



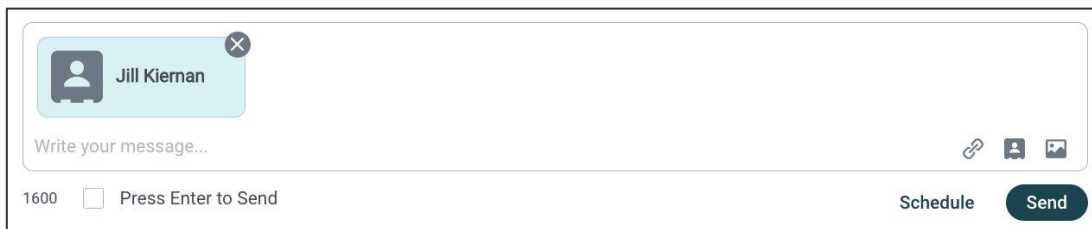
Write your message...

1600 ☐ Press Enter to Send

Schedule Send

The screenshot shows a message composition interface. At the top is a text input field with the placeholder 'Write your message...'. Below it is a character count '1600' and a checkbox labeled 'Press Enter to Send'. On the right side, there are three icons: a link icon, a contact card icon (highlighted with a red box), and a photo icon. At the bottom right, there are two buttons: 'Schedule' and 'Send'.

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



Jill Kiernan

Write your message...

1600 ☐ Press Enter to Send

Schedule Send

The screenshot shows the same message composition interface as before, but now a contact card for 'Jill Kiernan' is added to the message body. The card is a light blue rectangle with a person icon and the name 'Jill Kiernan'. Below the card is the text input field with the placeholder 'Write your message...'. The character count '1600' and the 'Press Enter to Send' checkbox are still present. The 'Attach Contact Card' icon is no longer highlighted. The 'Send' button is now a dark blue button with white text.

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

Share On-Demand Links in Text Messages

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

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

Links to Insert into Messages

Links added below will be available for easy insertion into messages to clients.

Calendar Link

Video Conference Link


Client Portal Link

Cancel **Save Changes**

3. After you've included your links, click **Save Changes**.

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

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

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

Write your message...

1600 ☐ Press Enter to Send

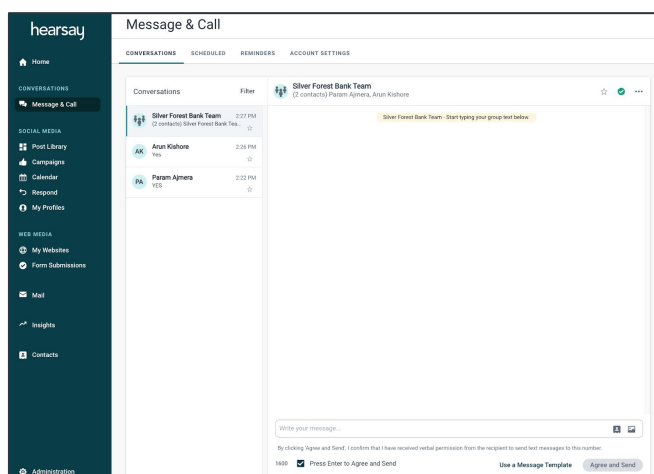
Schedule **Send**

Group Messages

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

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

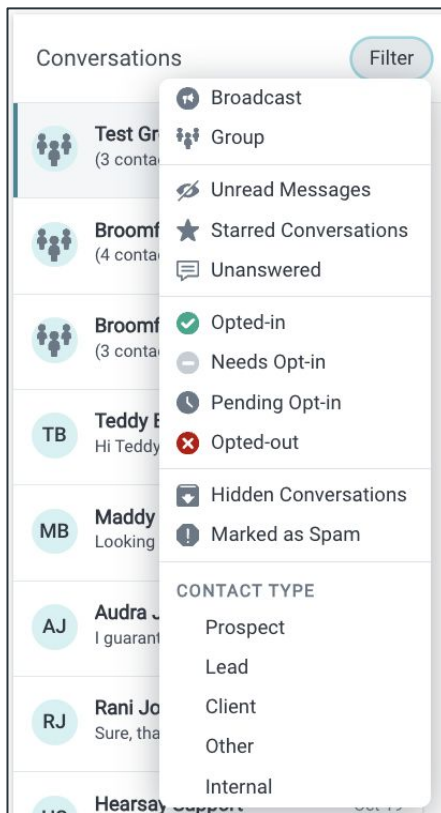
1. Log into Hearsay Relate and click **Message & Call** from the left side menu.
2. Click the **New Group** button located at the top right of your conversations.
3. Search for and add between 2 and 9 contacts that you would like to include in the group text. Only contacts who have opted in to receiving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



Filter Conversations

You can filter your conversations within Hearsay Relate by selecting Filter within the Conversations tab.

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

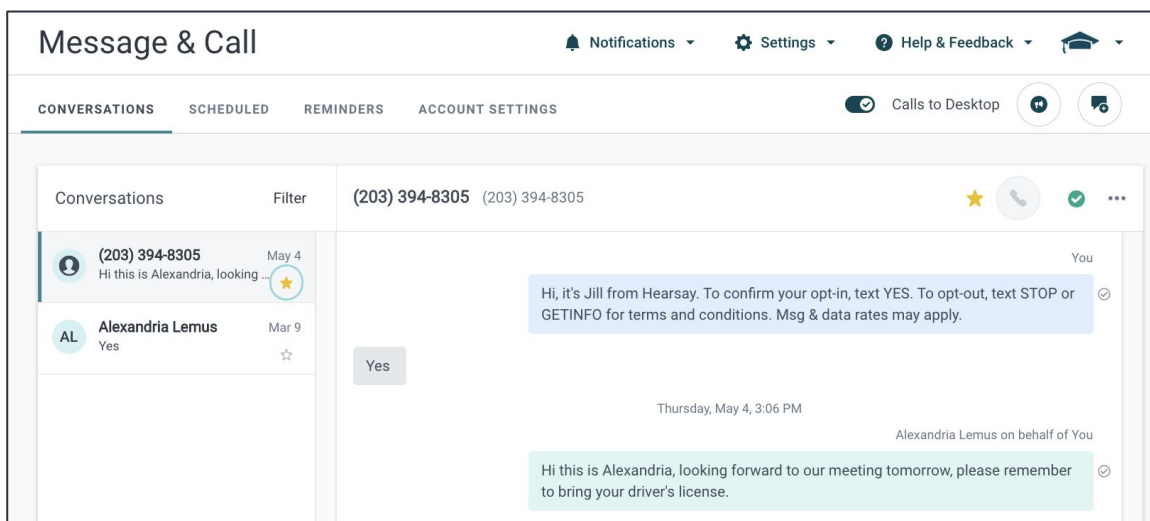


You can choose to hide or mark a conversation as spam from a conversation by selecting the three-dots icon on the right-hand side to display your options. In addition, Workspace Owners can conceal select text messages to keep sensitive information private.

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



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

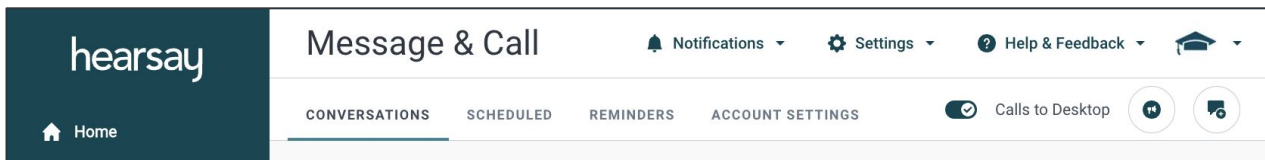


Phone Calls

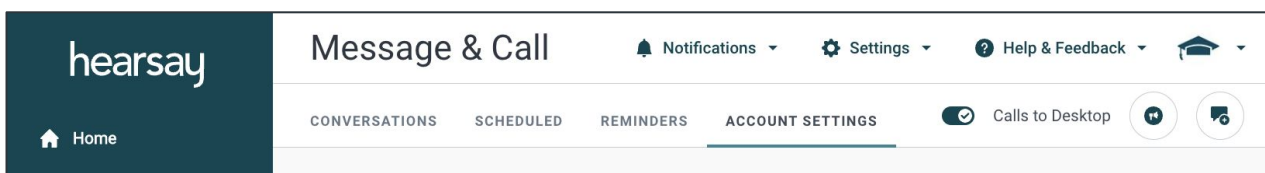
Answer Incoming Hearsay Relate Calls from Your Computer (Inbound VOIP)

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

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



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

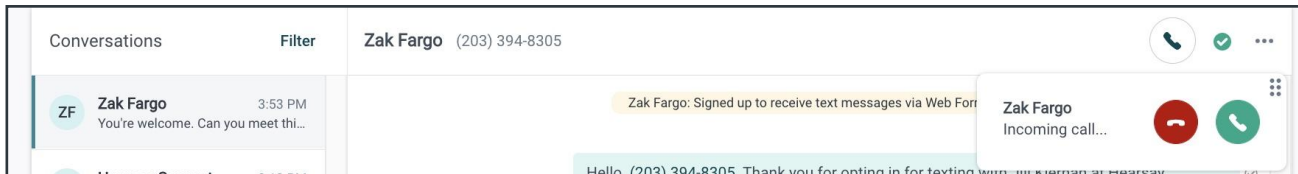


Inbound Call Handling

- ☒ All calls go to all office members (Default)
- ☐ All calls go to a designated office member
- ☐ All calls go to Workspace Owner
- ☐ All calls go to office number

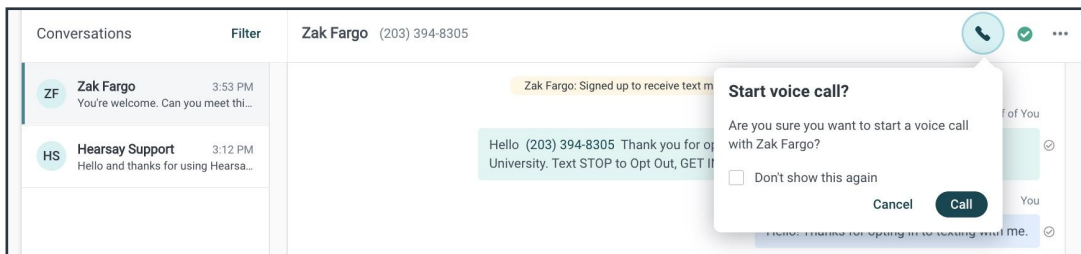
Cancel
Save Changes

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

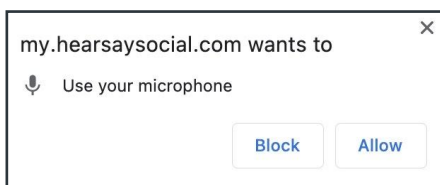


Make Outbound Hearsay Relate Calls from Your Computer (Outbound VOIP)

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



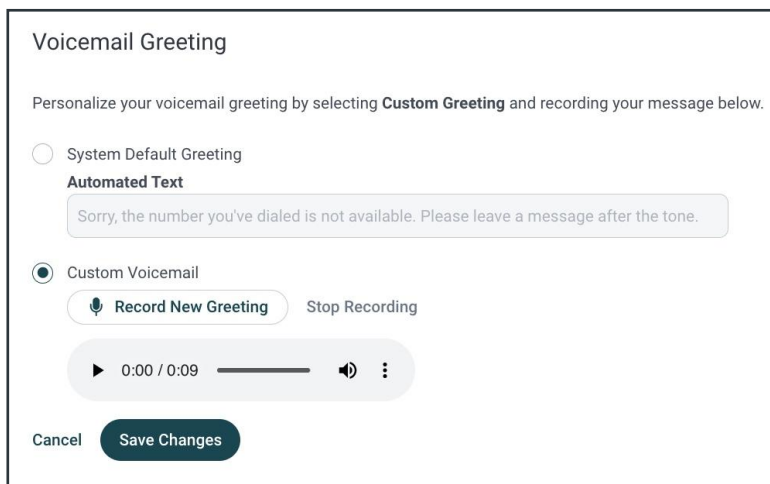
Make sure that your microphone is enabled before making an outbound call via Hearsay Relate. Similar to inbound calls, the call history will be recorded on the Phone tab on your Hearsay Relate mobile app.



In-App Voicemail

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

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



Voicemail Greeting

Personalize your voicemail greeting by selecting **Custom Greeting** and recording your message below.

☐ System Default Greeting

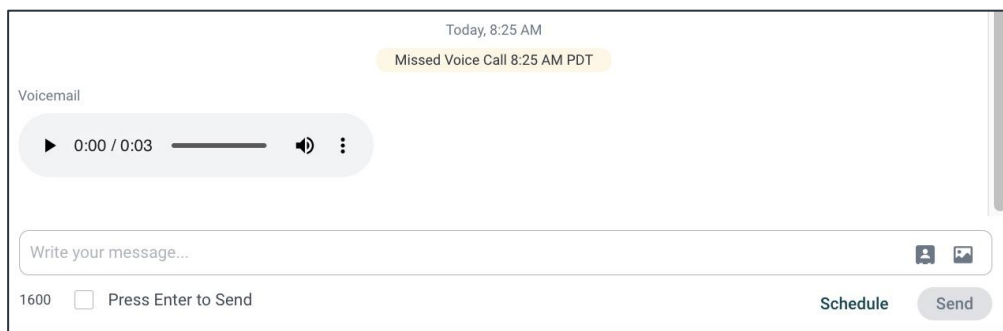
Automated Text

Sorry, the number you've dialed is not available. Please leave a message after the tone.

☒ Custom Voicemail

0:00 / 0:09

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



Today, 8:25 AM

Missed Voice Call 8:25 AM PDT

Voicemail

0:00 / 0:03

Write your message...

1600 ☐ Press Enter to Send

Set Working Hours and Auto-Reply

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

To set working hours:

1. Log into Hearsay Relate on your computer.
2. Click **Account Settings** from the navigation bar and scroll down to Working Hours.
3. Checkmark which days of the week your business is open.
4. For each day, designate the time at which your business opens and closes.

Working Hours

Use working hours to notify clients for when you're out-of-office or unavailable to respond.

Select your **working hours** (US/Pacific):

Monday, Tuesday, Wednesday, Thursday, Friday

Select your **working hours** (US/Pacific):

Day	Start Time	End Time
Monday	8:00 AM	5:00 PM
Tuesday	8:00 AM	5:00 PM
Wednesday	8:00 AM	5:00 PM
Thursday	8:00 AM	5:00 PM
Friday	8:00 AM	5:00 PM

Once a workspace has its working hours set, you have the options to send outside of working hours calls to voicemail and set an outside of working hours auto-reply text message for texts received outside of working hours. This message is sent only once to the contact in a given 24-hour window. This auto-reply message is limited to 160 characters and is run through your organization's lexicon to ensure banned words are not used.

5. If desired, underneath the working hours section, checkmark the box that states Enable outside of working hours auto-reply text.
6. You will then be presented with a box where you can enter in your custom message.
7. Click **Save Changes**.

☒ Send outside of working hours calls to voicemail

☒ Send outside of working hours auto-reply text

Outside of Working Hours Auto-Reply

Customize the Auto-Reply for any texts received outside of your working hours

Thank you for your message. We are currently out of the office and will get back to you shortly.

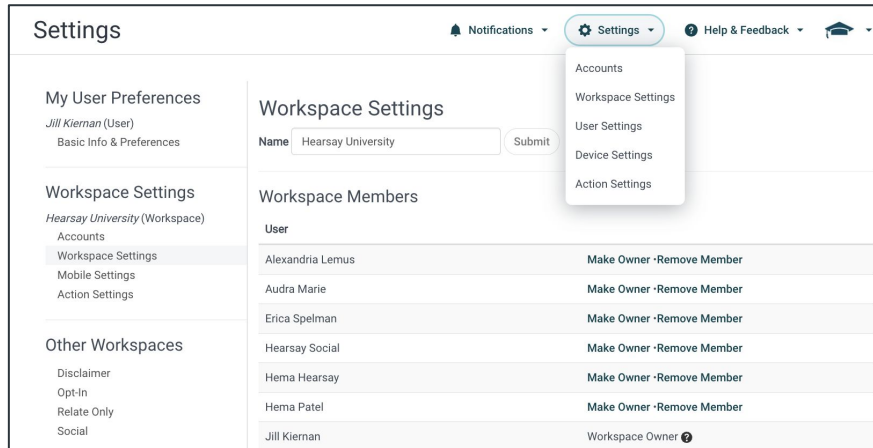
96/160

Cancel **Save Changes**

Settings

Workspace Settings

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



1. To change the Workspace name associated with your Hearsay Relate account, select the Name text box, type your new name, and click **Submit**.
2. To change the Workspace Owner, click on **Make Owner** to the right of the user. You can only designate one Workspace owner.
3. If you are the Workspace owner, you can click on **Remove Member** to remove a user from your Workspace. If you have sent an invitation to join your Workspace, you will see those members under Pending Workspace Members. To cancel or expire the invitation, click on the “x” next to the date the invitation was sent.
4. To invite staff members to your Workspace, enter the staff member’s email address and click **Invite**.

(screenshot on next page)

Workspace Settings (continued)

Settings

Notifications Settings Help & Feedback

My User Preferences
Jill Kiernan (User)
Basic Info & Preferences

Workspace Settings
Hearsay University (Workspace)
Accounts
Workspace Settings
Mobile Settings
Action Settings

Other Workspaces
Disclaimer
Opt-In
Relate Only
Social

Workspace Settings

Name: Hearsay University Submit

Workspace Members

User	Workspace Owner
Alexandria Lemus	Workspace Owner
Audra Marie	Make Owner
Erica Spelman	Make Owner
Hearsay Social	Make Owner
Hema Hearsay	Make Owner
Hema Patel	Make Owner
Jill Kiernan	Make Owner
Josh Wein	Make Owner
Lexie Hearsay	Make Owner
Mike Skalandunas	Make Owner
Pradeep Ananthapadmanabhan	Make Owner
Sophie Gonzal	Make Owner

Pending Workspace Members

Invited by	Date Sent
jillian.m.kiernan@gmail.com	Jill Kiernan 5/5/23

Invite More Workspace Members

Email: Email address

Language: English

Message: Invite message

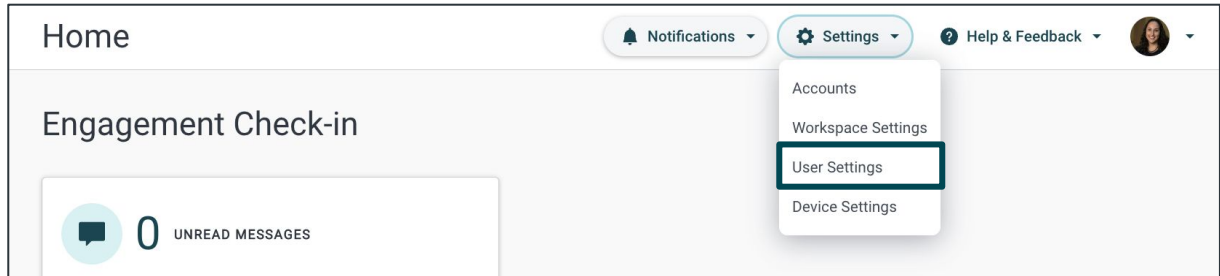
Invite

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

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

User Settings

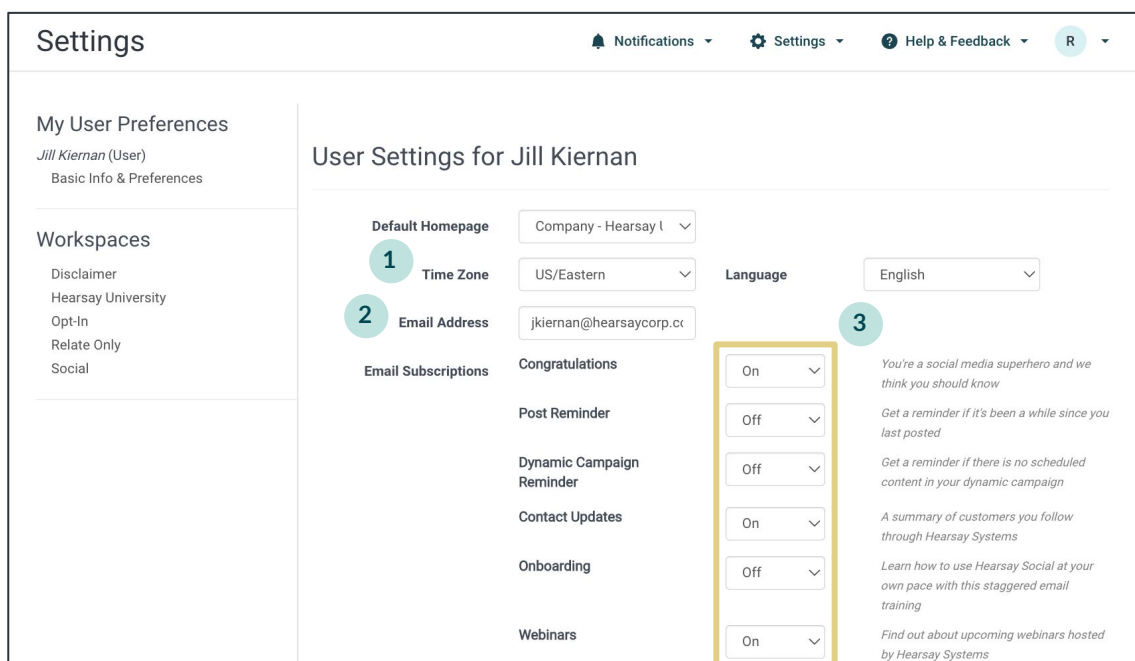
You can adjust your Hearsay Relate account to make the application work best for you by changing your User Settings. To update user settings, select **User Settings** from the Settings dropdown located at the top of your screen.



1. Adjust your local time zone. This is important to make sure your scheduled posts go out at the right time.
2. Change or update your email address in the Email Address text box. Hearsay Relate notifications will be sent to this email address.

Note: If you sign on to Hearsay using the LinkedIn or Facebook login method, your email in Hearsay will update automatically to the email you use to login to your social network. We recommend updating your email in Hearsay to your corporate email address so you can receive Hearsay notifications to that email.

3. You can opt-in or opt-out of email notifications by selecting “ON” or “OFF” from the Email Subscriptions dropdown.



Mobile Application

Download and Install Hearsay Relate to your Mobile Device

Apple iOS Devices

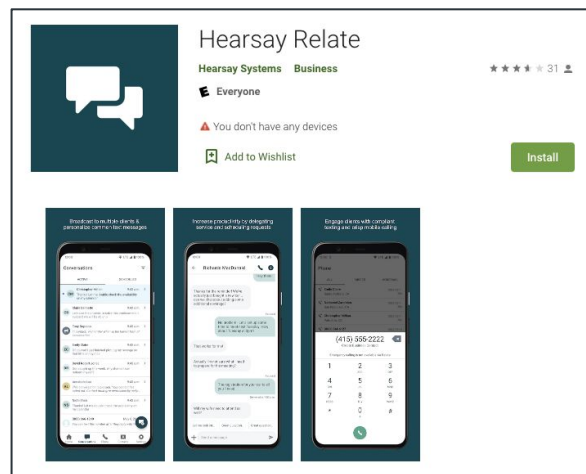
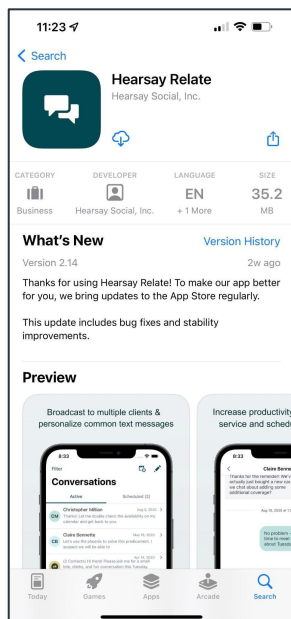
Follow these instructions to download and install the Hearsay Relate app for iPhone and iPad:

1. Tap on the App Store application on your iPhone or iPad.
2. Search for **Hearsay Relate**.
3. Tap on the **Hearsay Relate** app from the list of search results.
4. Tap **Get**.
5. Tap **Install**.
6. Type in your Apple ID password and select **OK** if applicable.

Android Devices

Follow these instructions to download and install the Hearsay Relate app for Android devices:

1. Tap on the Google Play Store application on your Android device.
2. Search for **Hearsay Relate**.
3. Tap on the **Hearsay Relate** app from the list of search results.
4. Tap **Install**.
5. Tap **Accept**.

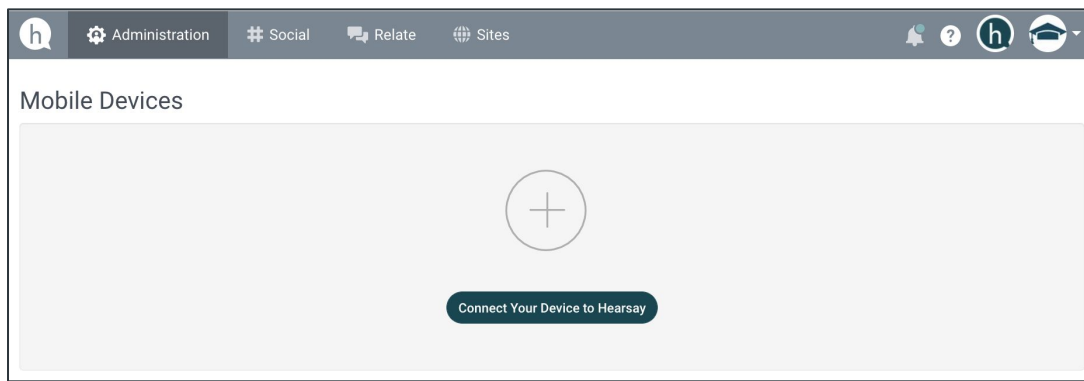


Authorize your mobile device

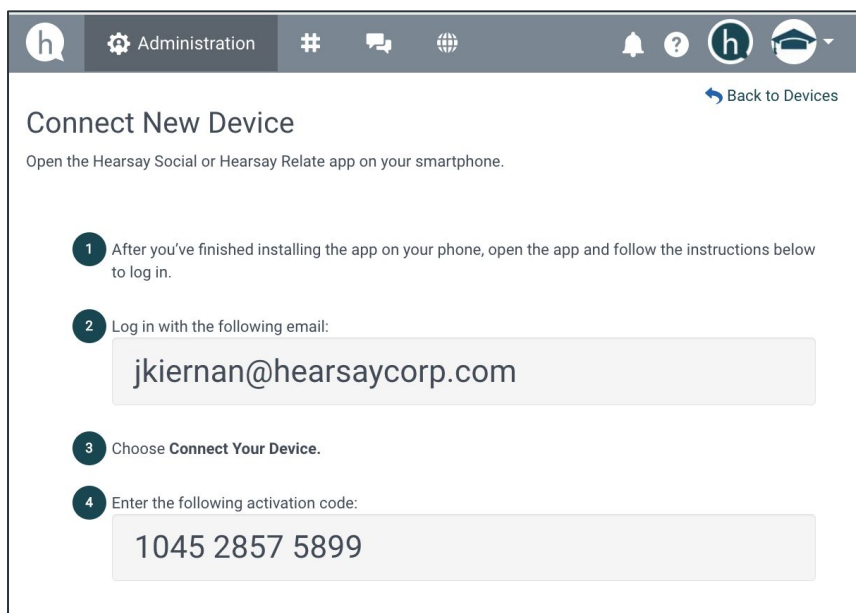
Authorize your mobile device with your Hearsay workspace

Before accessing the Hearsay Mobile application, make sure that your mobile device is synced and authorized by your workspace.

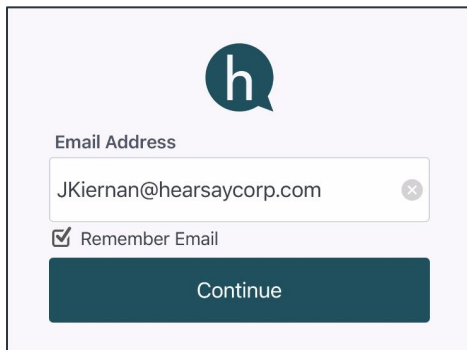
1. Log into your **Hearsay** workspace on your desktop computer.
2. Click your workspace drop-down menu and choose **Mobile Settings**.
3. Click **Connect Your Device to Hearsay**.



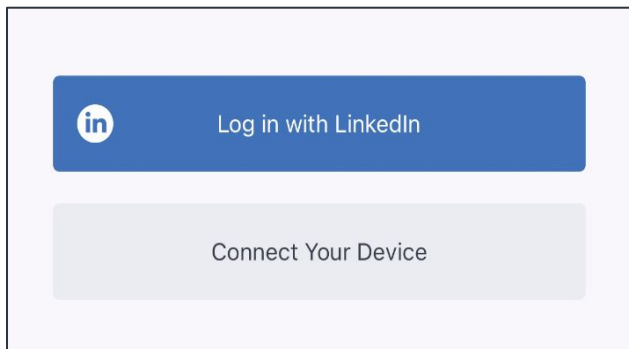
4. You will be presented with instructions on the next page, highlighting your user email address and activation code in Steps 2 and 4. Keep this information open on your computer, and open up the Hearsay Relate application on your mobile device.



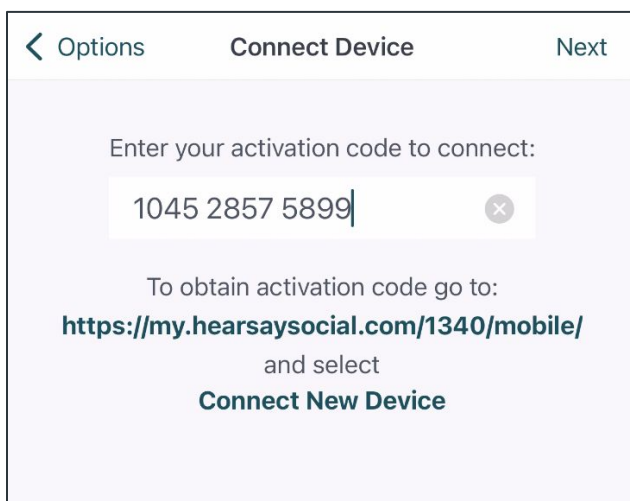
5. When the Hearsay Relate app opens for the first time on your phone, you will need to log in. Enter the email address you were presented with in Step 4 and click **Continue**.
Pro Tip: Click the Remember Email box for easy access.

A screenshot of the Hearsay Relate app's login screen. At the top is the Hearsay logo, a dark teal circle with a white 'h'. Below it is the text 'Email Address' above a text input field containing 'JKiernan@hearsaycorp.com'. To the right of the input field is a small grey circle with a white 'x'. Below the input field is a checkbox with a checkmark and the text 'Remember Email'. At the bottom is a dark teal button with the text 'Continue' in white.

6. Click **Connect Your Device**.

A screenshot of the Hearsay Relate app's login options screen. It features two buttons. The top button is blue with the LinkedIn logo on the left and the text 'Log in with LinkedIn' in white. The bottom button is light grey with the text 'Connect Your Device' in dark grey.

7. Enter the activation number you were presented with in Step 4 to complete the authorization process.

A screenshot of the Hearsay Relate app's 'Connect Device' screen. At the top is a navigation bar with a back arrow and the text 'Options', the title 'Connect Device', and a 'Next' button. Below the navigation bar is the text 'Enter your activation code to connect:' above a text input field containing '1045 2857 5899'. To the right of the input field is a small grey circle with a white 'x'. Below the input field is the text 'To obtain activation code go to:' followed by the URL 'https://my.hearsaysocial.com/1340/mobile/' in bold. Below the URL is the text 'and select' followed by the text 'Connect New Device' in bold.

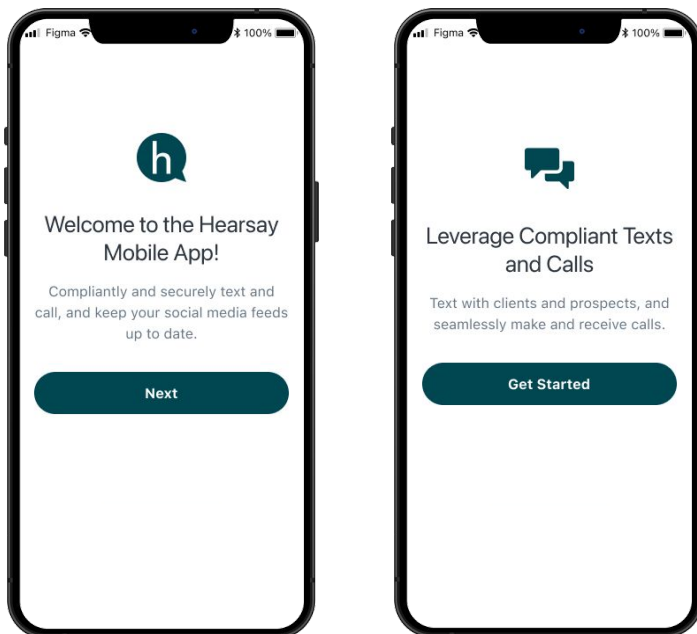
Getting started

Once you've authorized your mobile device to your workspace, you'll be able to start the onboarding process and access the **Home** tab for the app.

There are three possibilities, depending on your Hearsay access.

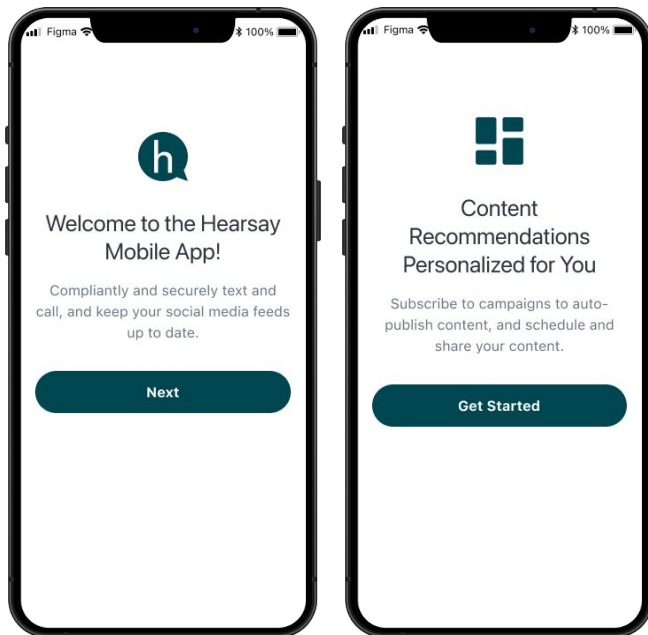
For Relate-only users:

1. Open the Hearsay Mobile app and click the **Next** button. This will take you to the next screen to the **Home** tab to onboard onto Relate.



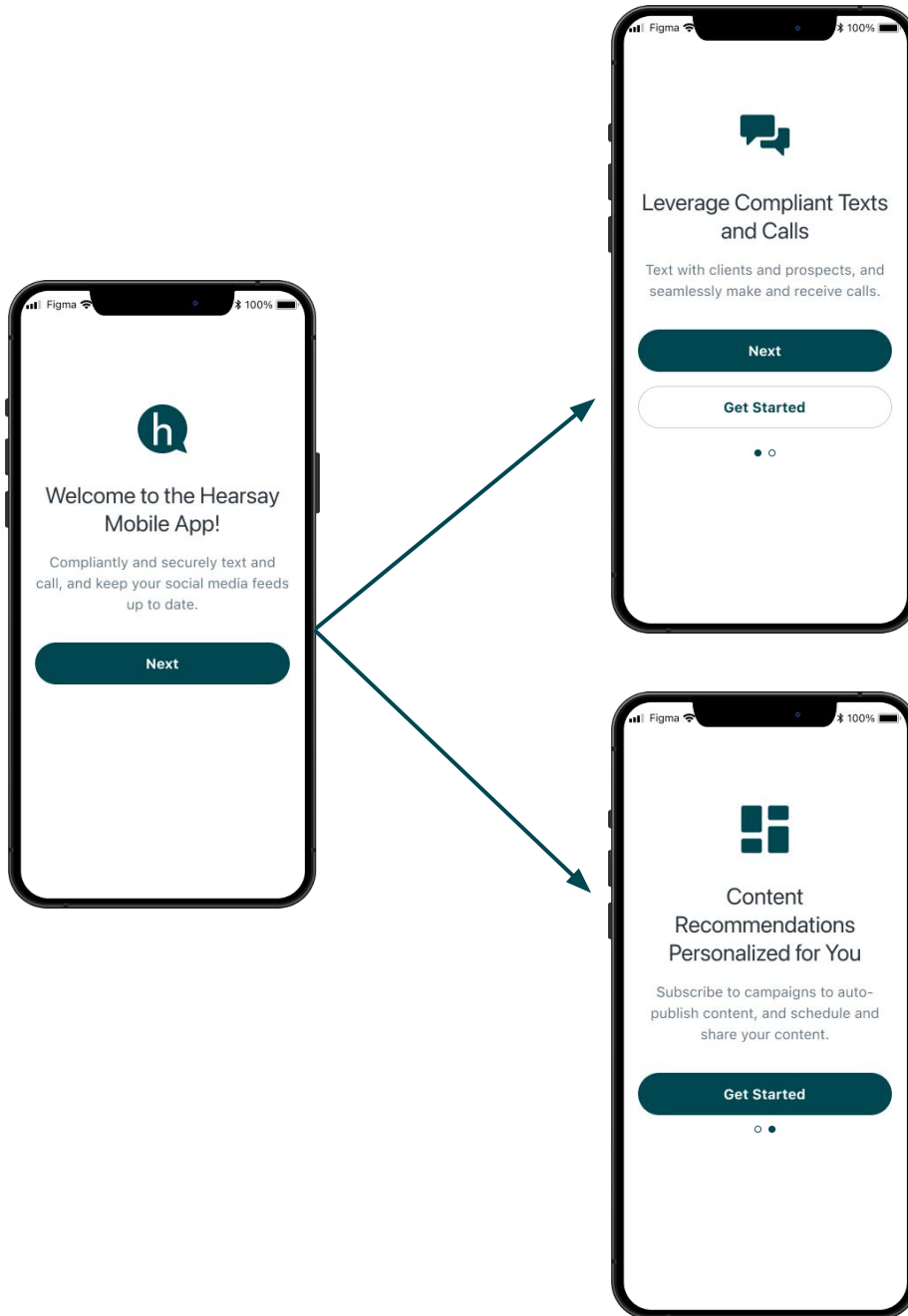
For Social-only users:

1. Open the Hearsay Mobile app and click the **Next** button. This will take you to the next screen to the **Home** tab onboard onto Social.



For Relate + Social users:

1. Open the Hearsay Mobile app and click the **Next** button. This will take you to the next screen where you can swipe to choose to onboard to Social or Relate. Clicking **Next** will also take you to the Social onboarding option. Click **Get Started** on the screen to go to the **Home** tab and onboard to the selected tool.

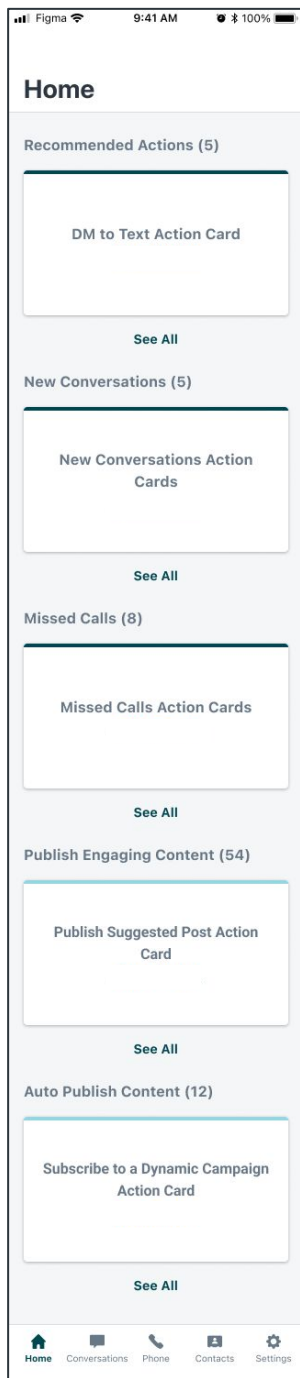


Home tab

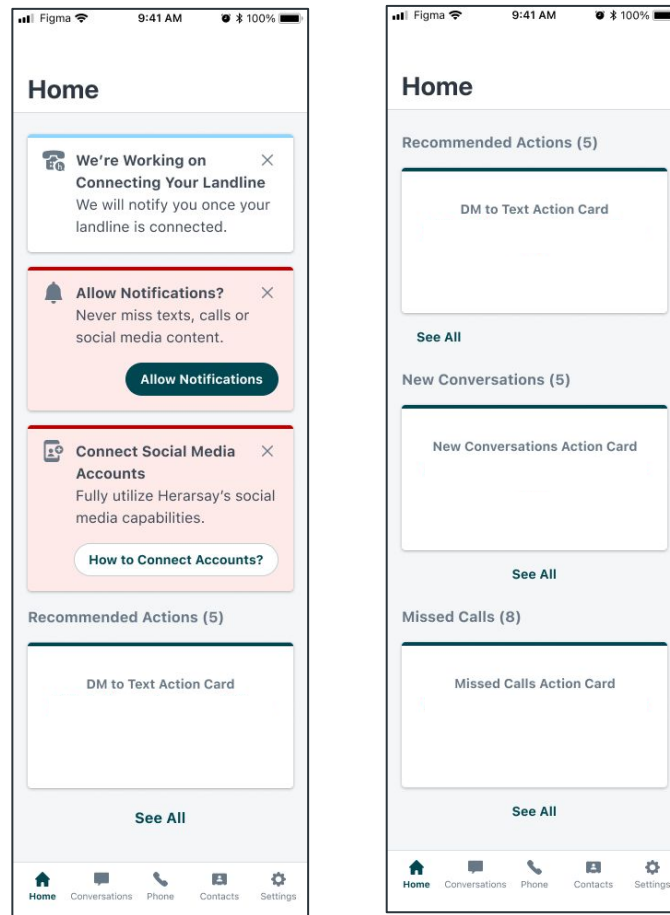
The **Home** tab in the Hearsay Relate app will display a number of **Action** cards similar to those found on the web platform. These cards will guide you through tasks to complete your onboarding. The displayed cards will change depending on which tasks are still outstanding.

Examples of Action cards

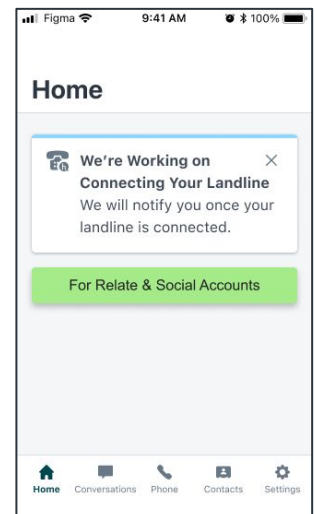
Card order



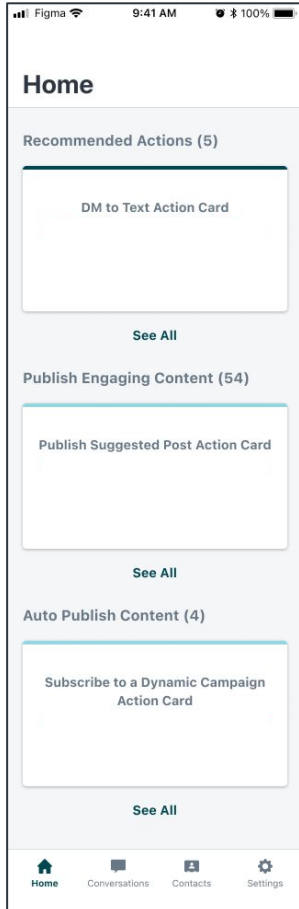
Relate only



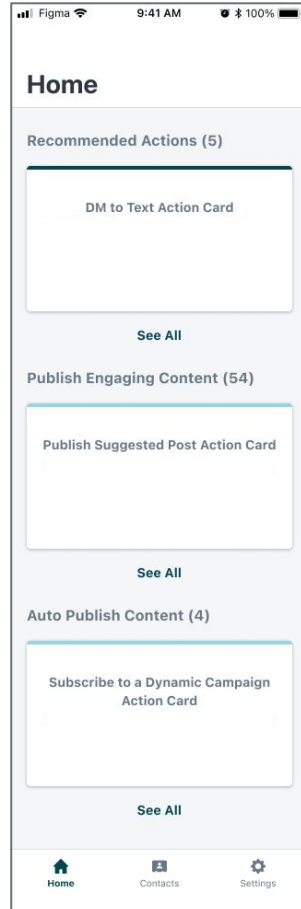
Landline provision in progress



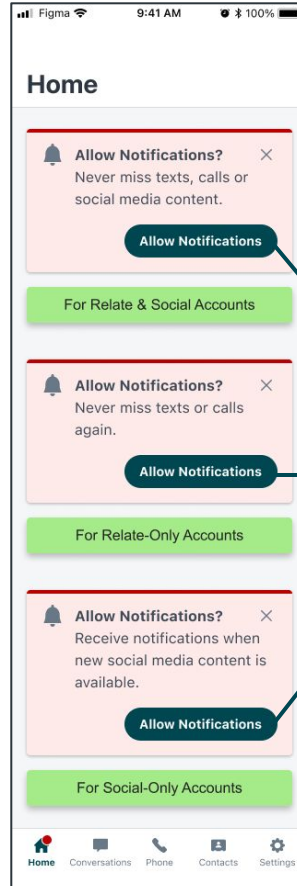
With social DMs



Without social DMs

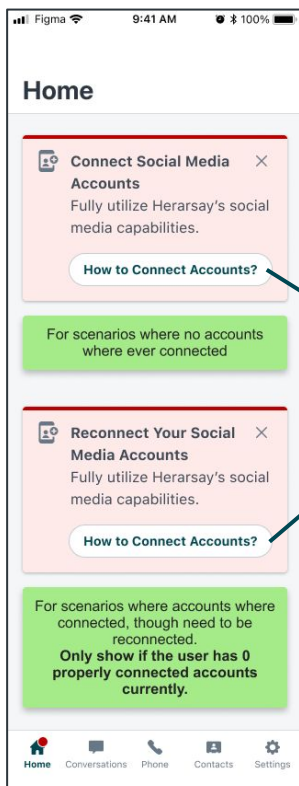


Notifications



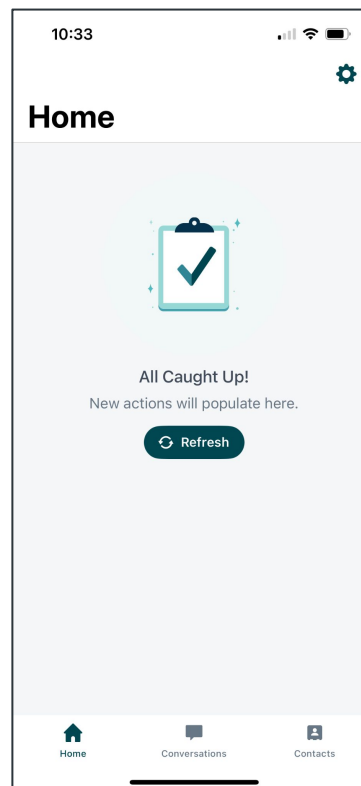
Open iOS phone settings

Connect Social accounts



Open Hearsay Help Center

All Caught Up!



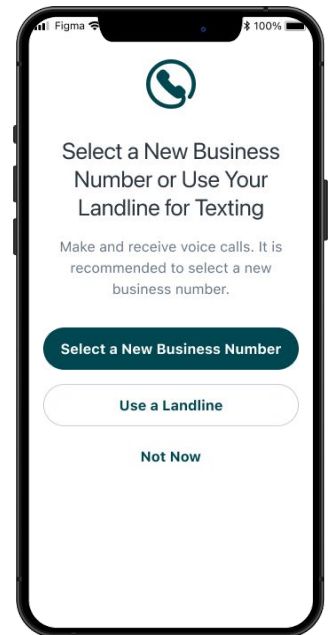
Screen appears when there are no more actions to complete

Get a Hearsay Relate number

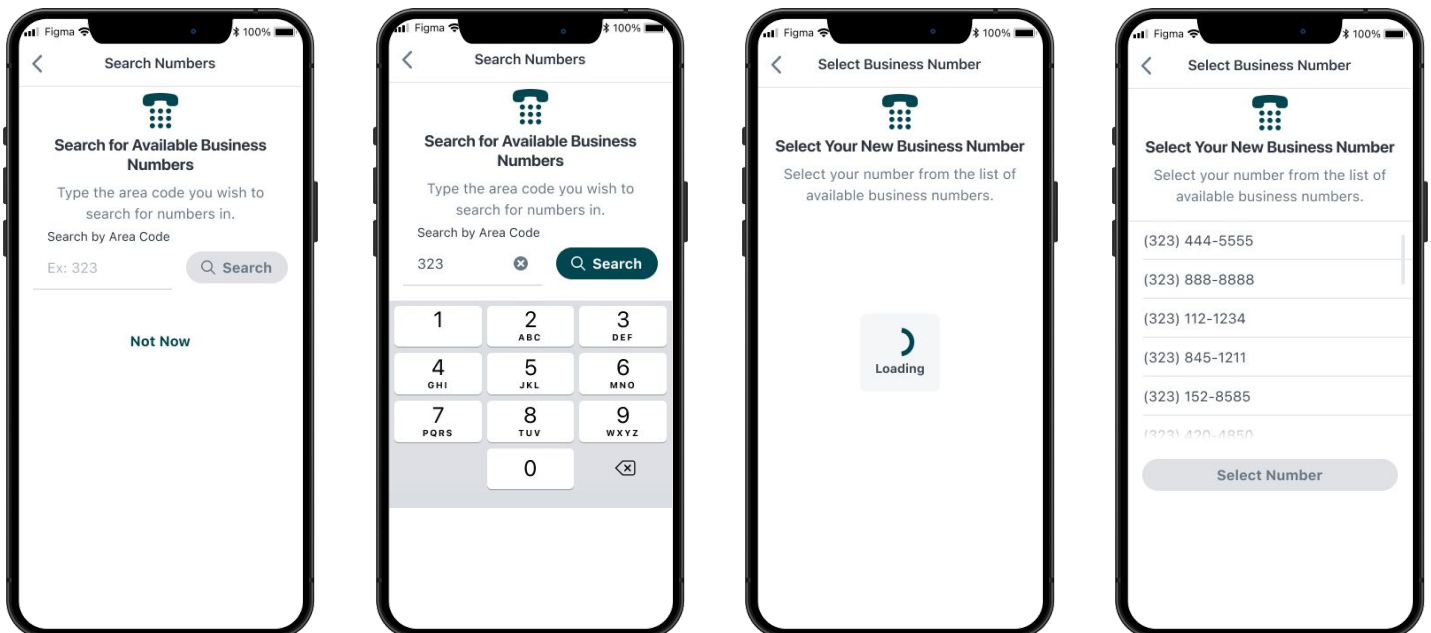
Once you've authorized your mobile device to your workspace, you'll be able to choose between obtaining a FREE Hearsay Relate dedicated number or connecting your text-enabled landline phone number.

To get a Hearsay Relate dedicated number:

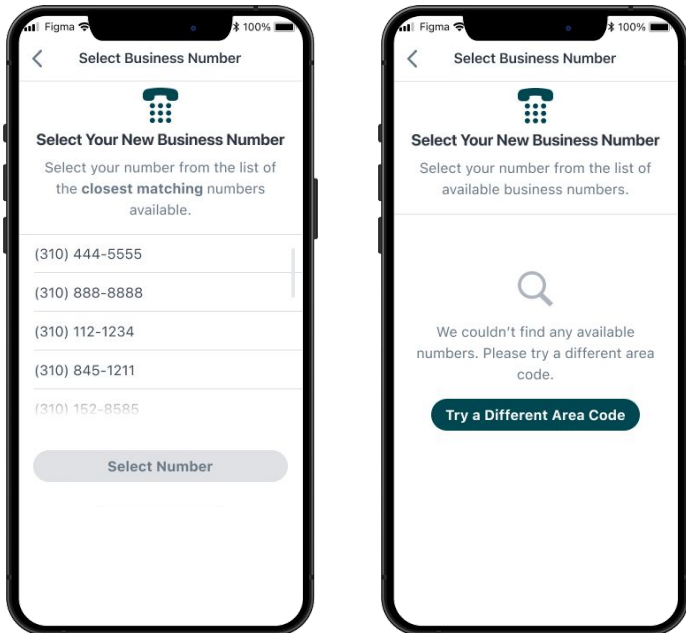
1. In the mobile app, click on the prompt to get a new number or click on the **Conversations** tab at the bottom of the screen. You will have the options to **Select a New Business Number**, **Use a Landline** or **Not Now**. Skipping setup will take you back to the previous screen.



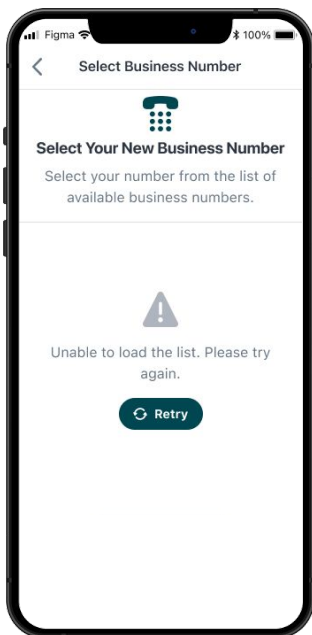
2. To get a dedicated Relate number, click **Select a New Business Number**. You will need to enter your area code to search for a new number. If numbers are available, you will see a screen with available numbers.



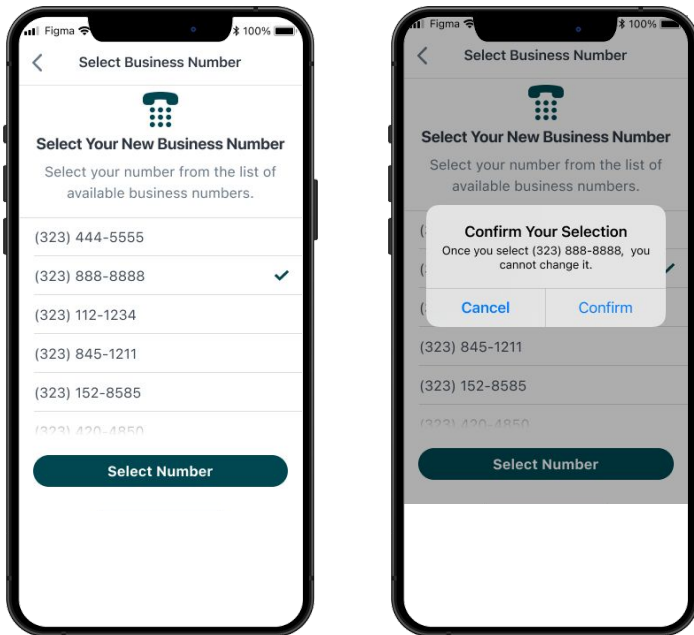
If there are no Hearsay Relate numbers available, you will see one of two possibilities. The first possibility is to select the closest matching area code. The other possibility is to search another area code.



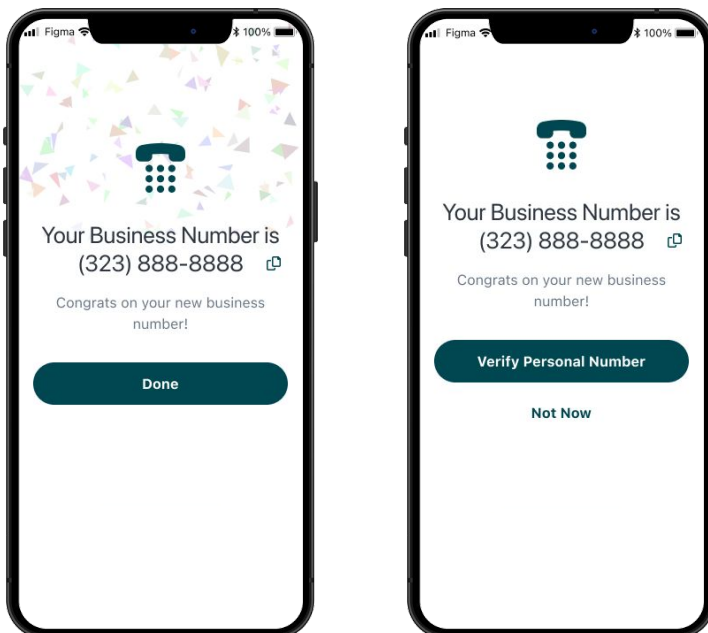
If you do run into any network errors, you will have the option to retry.



- After reviewing the available numbers, you can select the one you prefer. You will then be asked to confirm your selection in the pop-up notification.



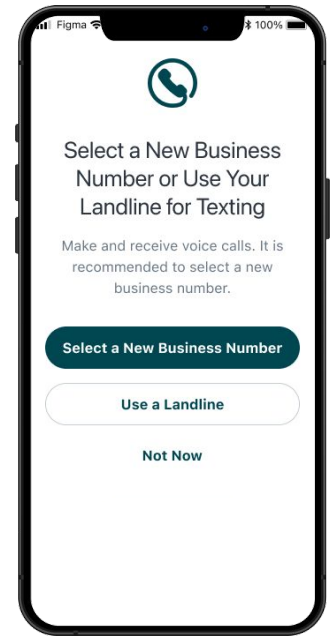
After confirming your number, you will see the “Congratulations” message. You can then click **Done**. You have the option to copy your new business number by tapping the teal paper icon next to it. If your device number setup is required, you will see the option to **Verify Personal Number**. You can select **Not Now** to go back to the **Home** tab.



Connect your landline number

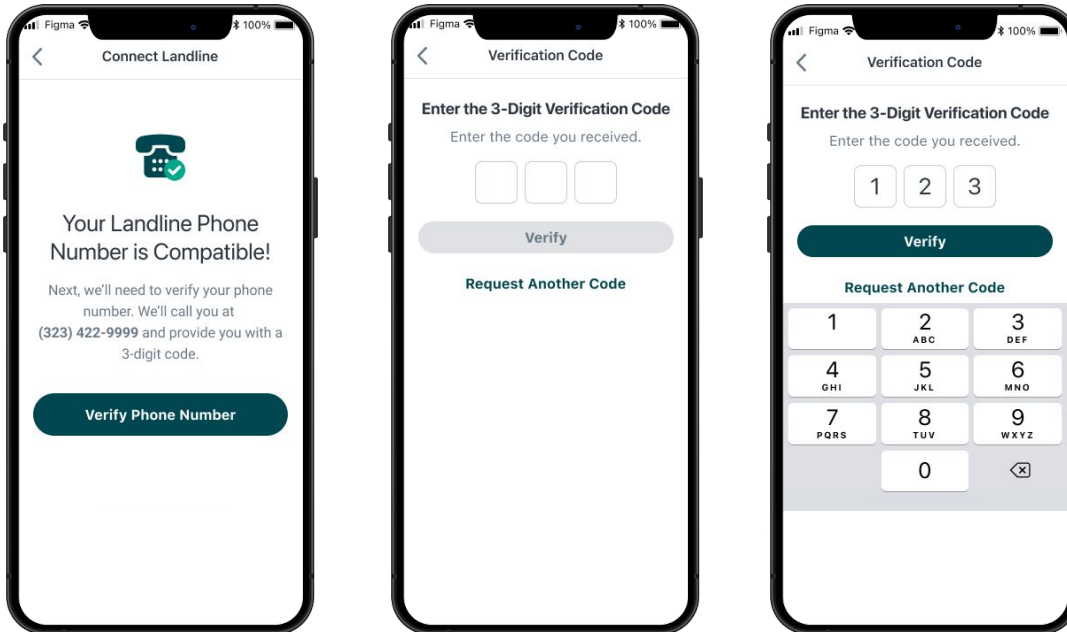
To connect your existing landline number:

1. In the mobile app, click on the prompt to enable your landline number or click on the **Conversations** tab at the bottom of the screen. You will have the options to **Select a New Business Number**, **Use a Landline** or **Skip Setup for Now**. Skipping setup will take you back to the previous screen.

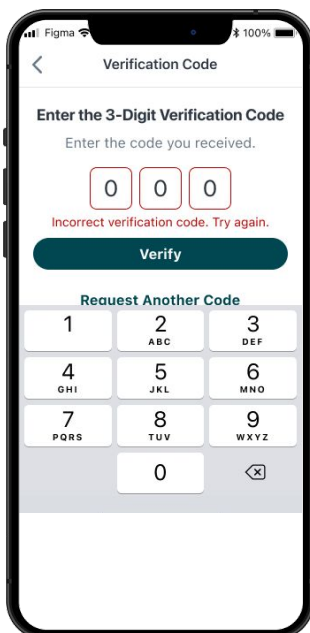


2. To connect your existing landline number, tap **Use a Landline**. On the next screen, enter your landline phone number to check for compatibility. After typing in your number, tap **Connect Landline**.

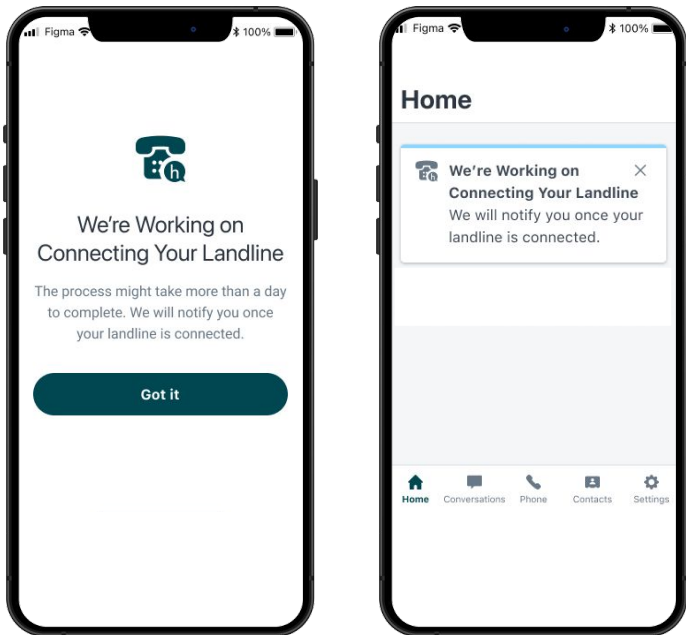
3. If your landline number is compatible, you will have the option to **Verify Phone Number**. This will walk you through the steps to confirm you have access to the landline number. Tapping **Verify Phone Number** will authorize Hearsay to call you with a three-digit verification code you will need to enter on the next screen and tap **Verify**. If necessary, you will have the option to request another code.



If you type in the wrong code, or your code expires, you will receive an error message and you can type it in again. You can also request another code if you need to.



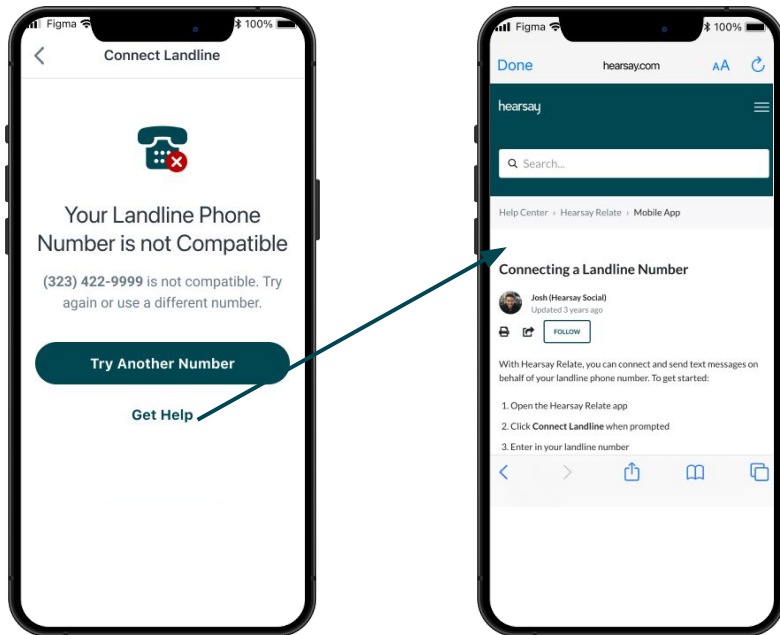
- After clicking verify, Hearsay will then prepare your landline for use. This step does not require any action on your part. You will see the **Action** card on your **Home** tab notifying you that Hearsay is connecting your landline.



You will receive a Mobile app notification when your account and number are ready. Opening the notification will take you to the Mobile **Home** tab.



If your landline number is not compatible, you will see a screen asking you to try another number. Clicking on **Get Help** will open a Hearsay Help Center article with information on how to connect your landline number.

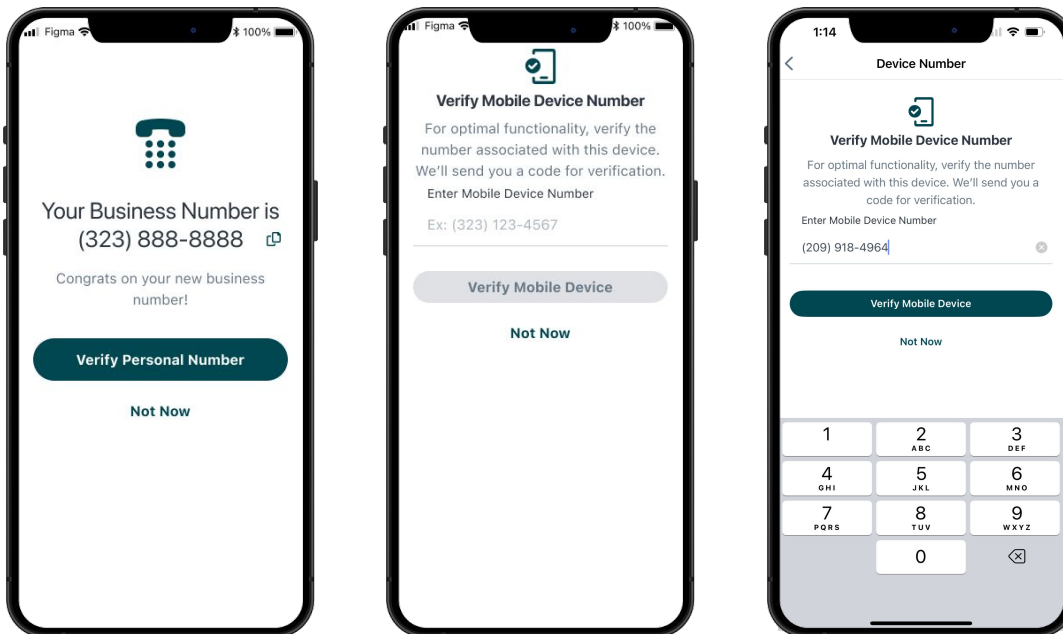


Verify your mobile device number

There are four places where you can activate the verification of your mobile device number so you can direct Relate calls to your mobile device: Number Confirmation Screen, Settings tab, Phone tab, and Contacts tab.

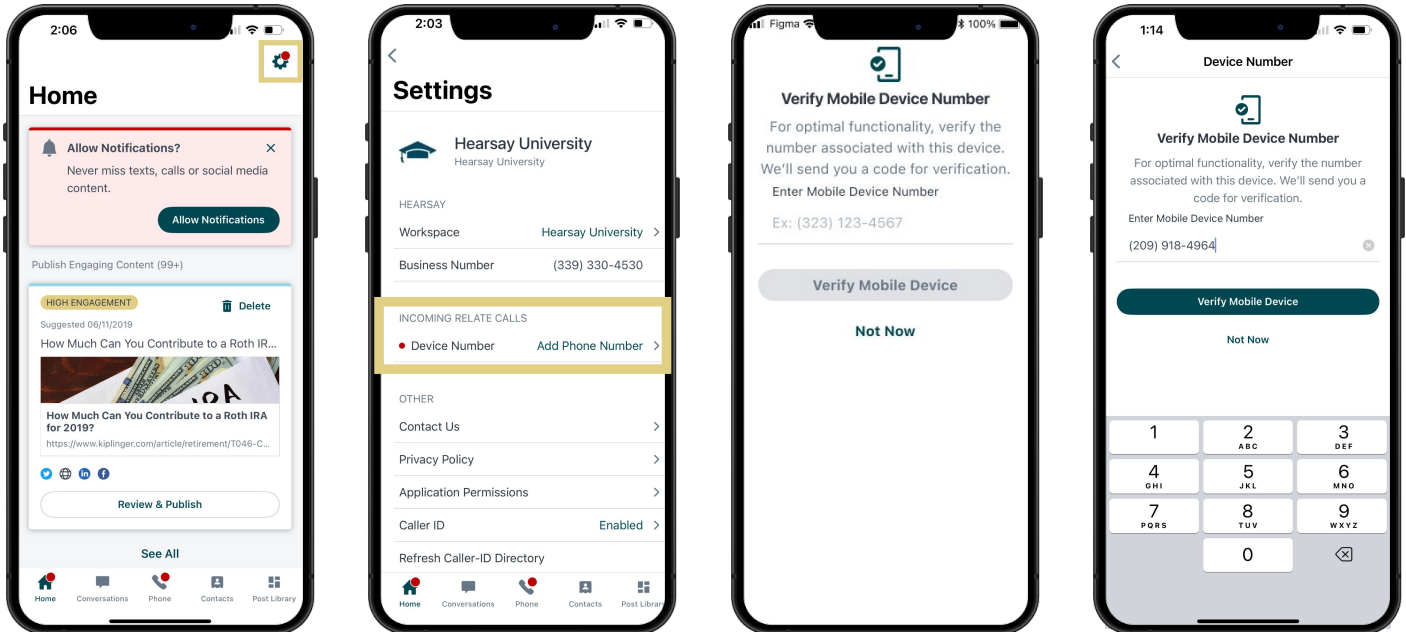
Number Confirmation Screen

1. From the number confirmation screen, you will need to tap **Verify Personal Number**. This will open a screen to enter your mobile device number.
2. Type in your mobile device phone number and tap **Verify Mobile Device**.



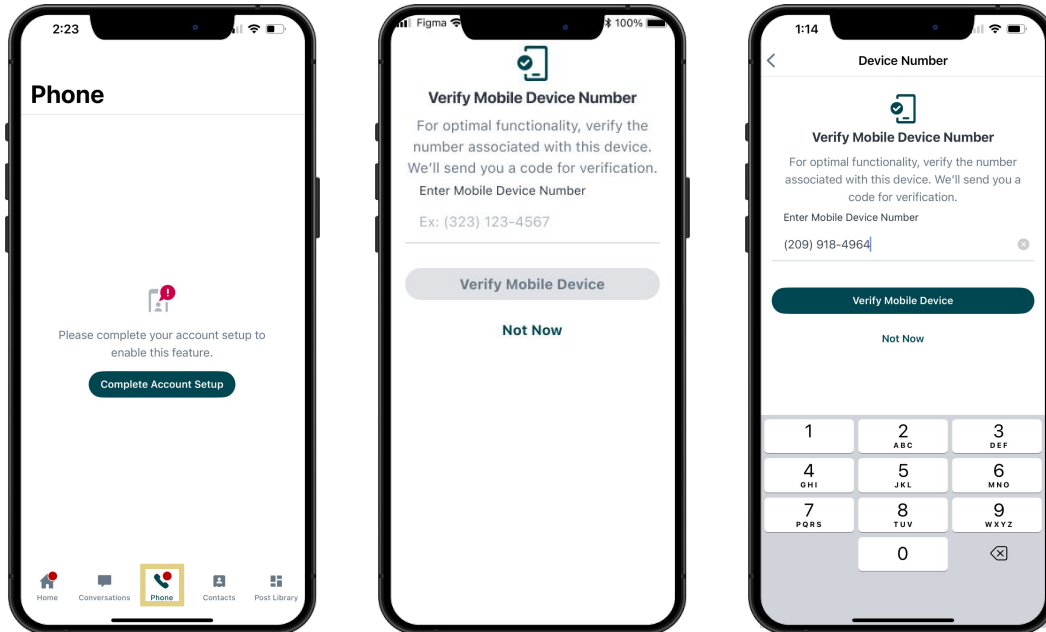
Settings Tab

1. From the number **Home** screen, click on the gear on the top right.
2. Tap **Add Phone Number** next to **Device Number**.
3. Enter your mobile device number on the next screen and tap **Verify Mobile Device**.



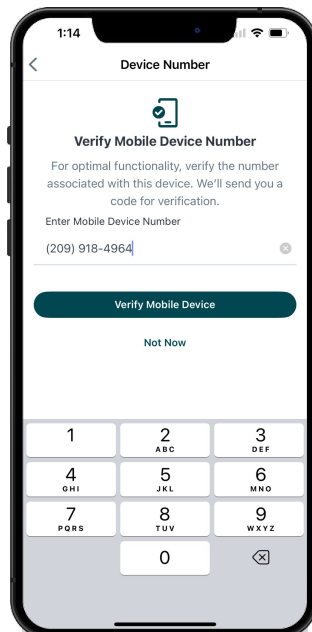
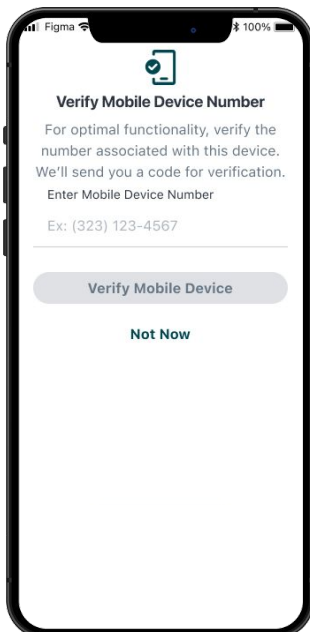
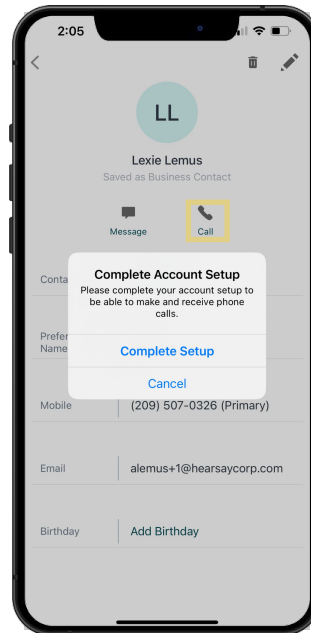
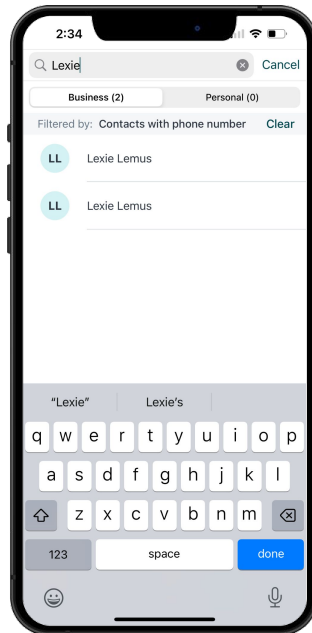
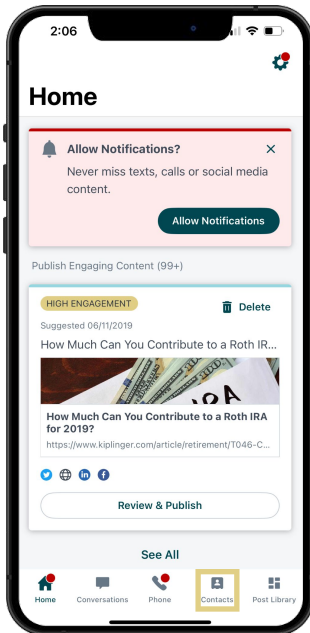
Phone Tab

1. Click on the phone icon on the bottom navigation bar.
2. Click on “Complete Your Account Setup” to enter in your mobile device phone number.
3. Enter in your device number and click **Verify Mobile Device**.



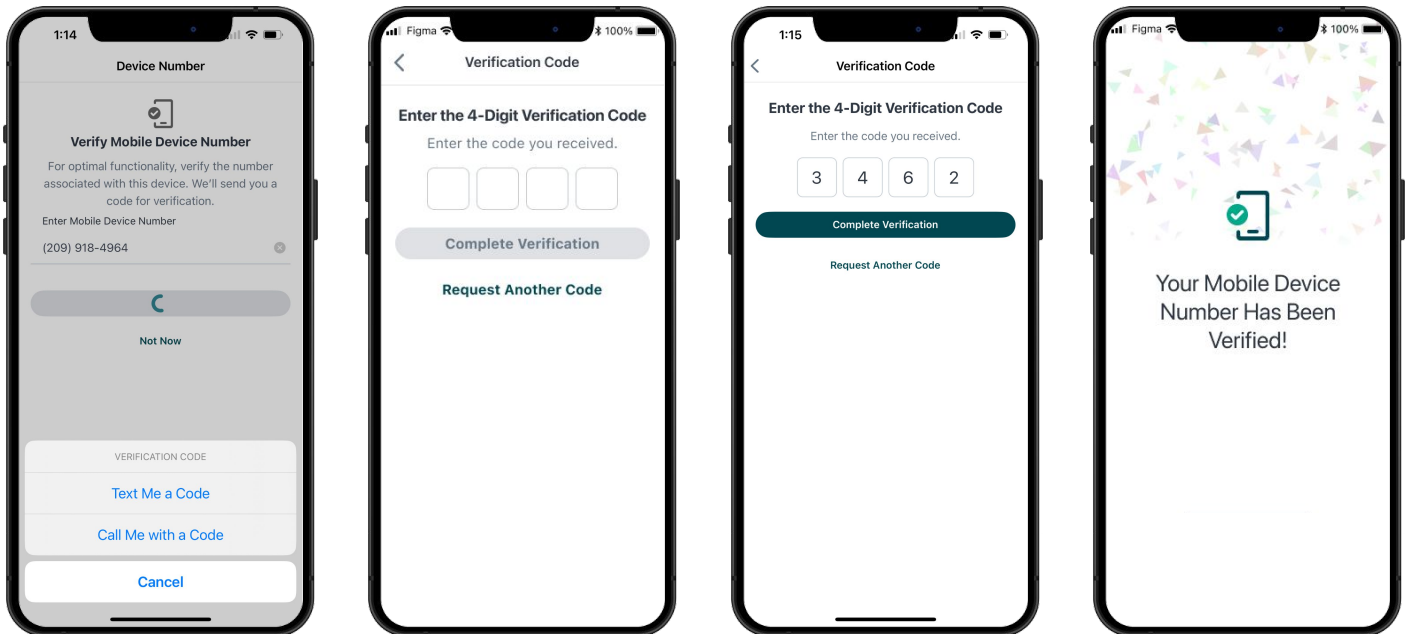
Contacts Tab

1. From the **Contacts** tab, you can search for a contact name.
2. Tap the contact name to open the contact card.
3. Click on the phone icon above **Call**.
4. This will prompt you to complete your account setup by verifying your mobile device number.



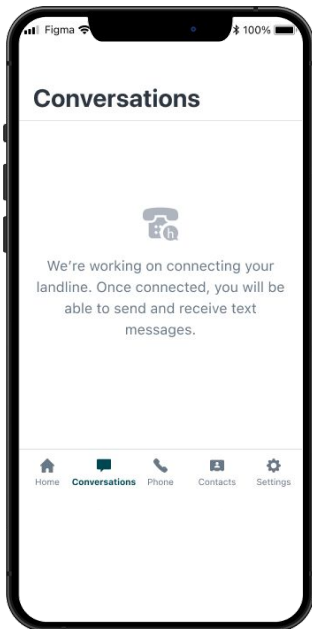
To complete the verification process regardless of which method you use, you will need to enter a verification code.

1. Choose **Text Me a Code** or **Call Me with a Code** to receive your verification code.
2. Type in the four-digit code and tap **Complete Verification**. You will see a confirmation on the next screen if the verification is successful.

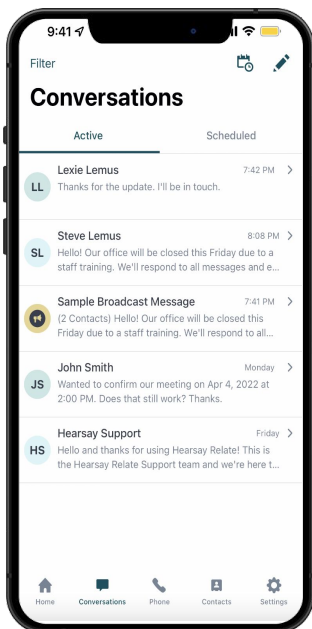


Conversations

Clicking on the **Conversations** tab will open up your texting conversations. If you are still waiting for your landline number to be provisioned, you will see a message on the screen informing you.



Once your number is ready, you will be able to view, send, and schedule text messages from the **Conversations** tab.



Attestation on the Mobile Application

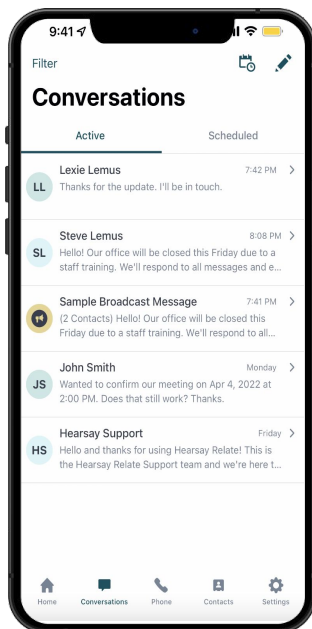
Attestation is the process of requesting permission to text message customers or prospects. This means getting legal consent to have communication and activity monitored and retained. Opt-In is a process which puts the power in the hands of your contacts, helping protect you and your staff regarding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

In order to text compliantly, your organization will have chosen from either of the following opt-in methods:

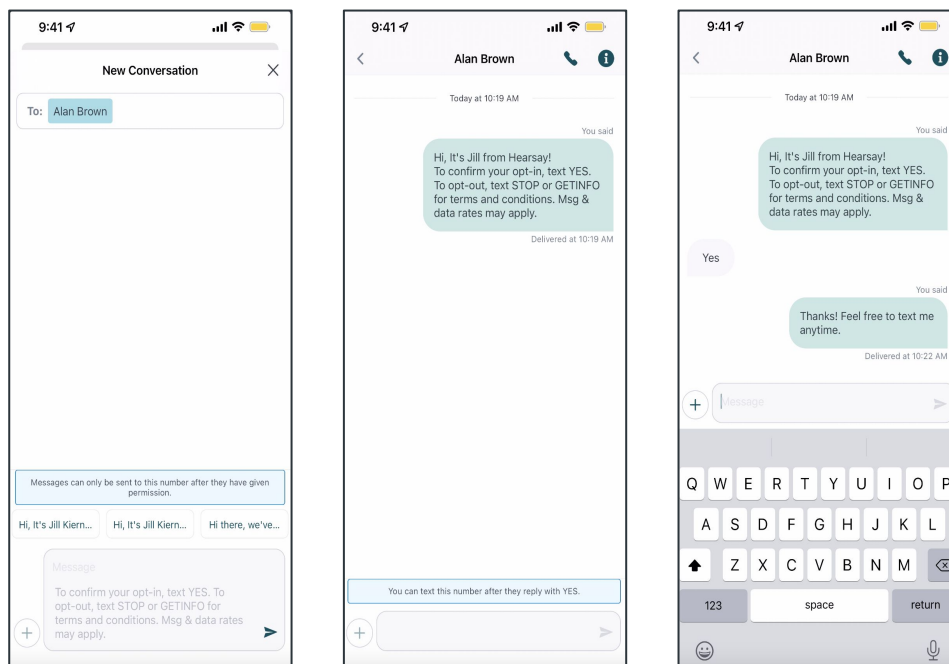
- **Opt-In:** Requires the user to send the opt-in message. The contact must respond "YES", verbatim, in order for the user to send further text messages.
- **Personalized Opt-In:** Allows the user to include a greeting message that appears prior to the opt-in message. The contact must respond "YES",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

To send the opt-in attestation message via the Mobile App, follow the steps below:

1. Navigate to the **Conversation** screen.
2. Tap the **Pencil** in the top right corner of the application.



3. Type in the number you wish to text or search the name of the contact. Then tap the number when completed.
4. The opt-in message will appear in the text box for you to read and review. If your organization allows, you may be able to personalize this message. Proceed by personalizing the message (as shown below) and click the blue arrow to send the opt-in message. If your organization does not allow you to customize the message, simply click the blue arrow to send the opt-in message as-is. Note: the Opt-in message has a 160 character limit.
5. Until your contact responds Yes, the conversation will display “You can text this number after they reply with YES.”
6. Once your contact responds Yes will you then be able to text them.



If the contact does not respond for 24 hours, you will be able to re-send the opt-in message again, up to 5 times in total.

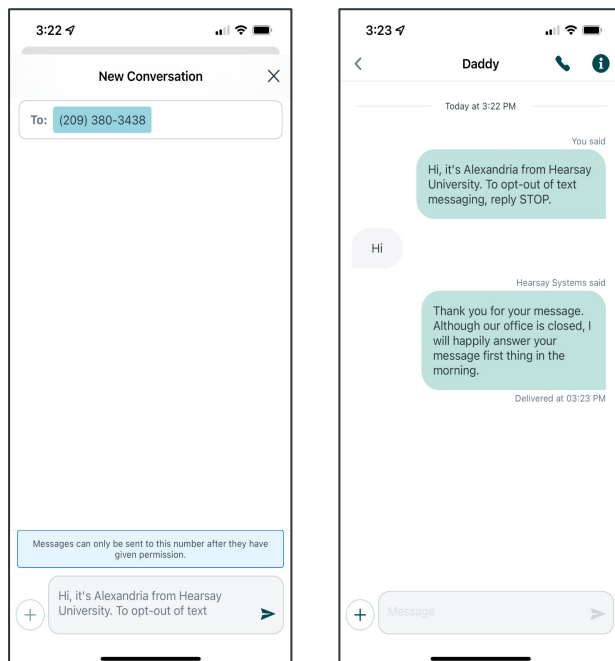
Send the Implied Opt-in Attestation Text

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

If a contact writes STOP, Hearsay Relate will send a message on your behalf letting the contact know that communication has been halted. However, the contact can respond UNSTOP to reinstate communication at which point Hearsay Relate will send a second message on your behalf. If the recipient texts back GETINFO, a message will be sent with a web link to more information (this link is set by your organization).

To send the implied opt-in attestation message via the Mobile App, follow the steps below:

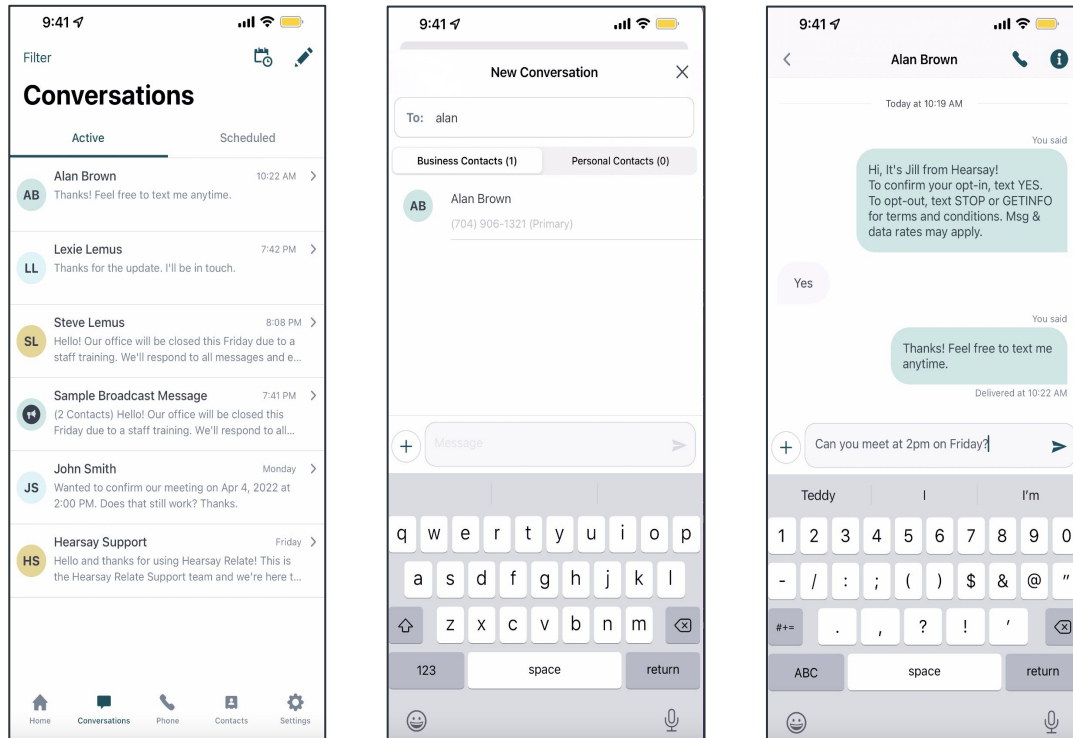
1. Navigate to the **Conversation** screen.
2. Tap the **Pencil** in the top right corner of the application.
3. Type in the number you wish to text or search the name of the contact. Then tap the number when completed.
4. The implied opt-in attestation message will appear in the text box for you to read and review. Simply click the blue arrow to send the implied opt-in attestation message.
5. You can begin texting the contact as soon as a delivery receipt is confirmed (usually less than 2 seconds).



Send Text Messages

To send a new text message within the Hearsay Relate mobile application:

1. Tap the **Pencil** icon to send a text message.
2. You will be prompted to choose a contact.
3. Once chosen, type your message. Depending on your organization's policy, you may be able to add a photo, link, or your contact card to the message.
4. To send the message, click on the **blue arrow**.



Send Quick Replies

With Quick Replies, you can leverage auto-generated replies within the app by choosing from three automatically generated messages designed to help you respond quickly and keep the conversation going.

To use Quick Replies:

1. Once a response from a contact is received, you can choose from three automatically generated messages.
2. Click on the Quick Reply that you'd like to send.
3. The selected message will appear in the text field. Please edit and customize the text if you'd like.

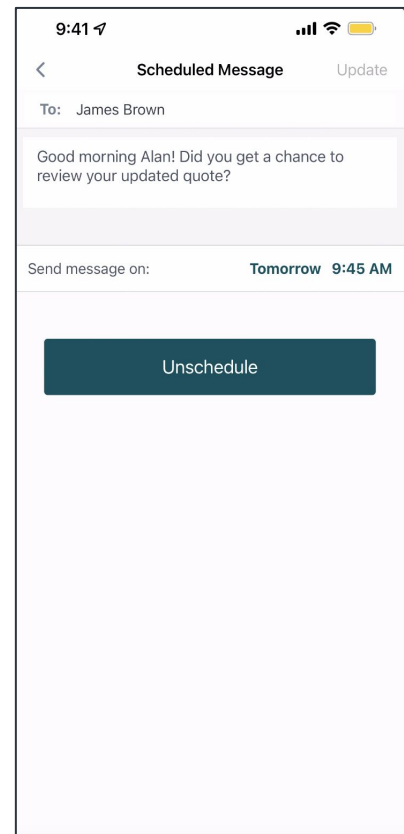
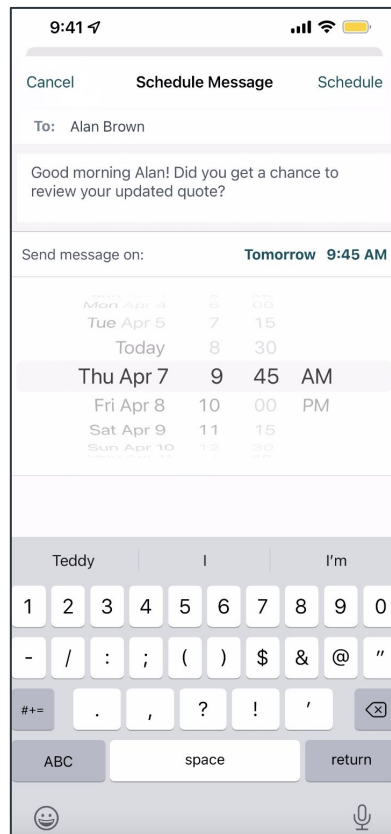
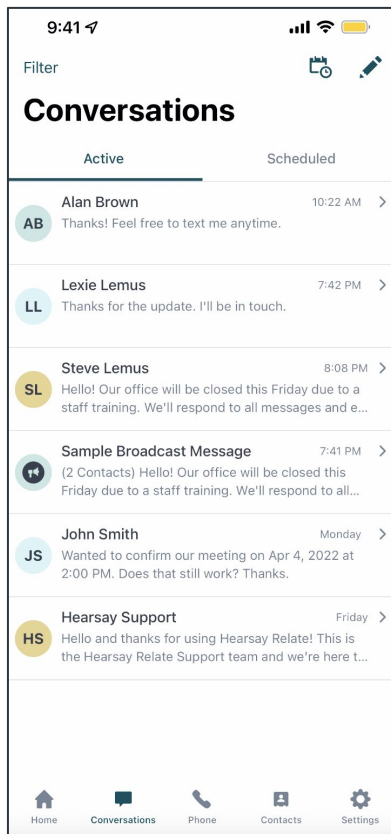
Schedule Text Messages

You have the option to send a text message immediately or schedule it to send on a date and time that you select.

To schedule a new text message within the Hearsay Relate mobile application:

1. Tap the **Calendar** icon next to the pencil icon to schedule a text message.
2. You will be prompted to choose a contact.
3. Once chosen, type your message. Then select a date and time for the text message delivery.
4. To finish, select **Schedule**. The scheduled message will appear when you click on your Scheduled messages.

You can modify a scheduled text message by opening it within your Scheduled messages. This will allow you to change the text, date, and time of the message. You can also unschedule the message entirely.



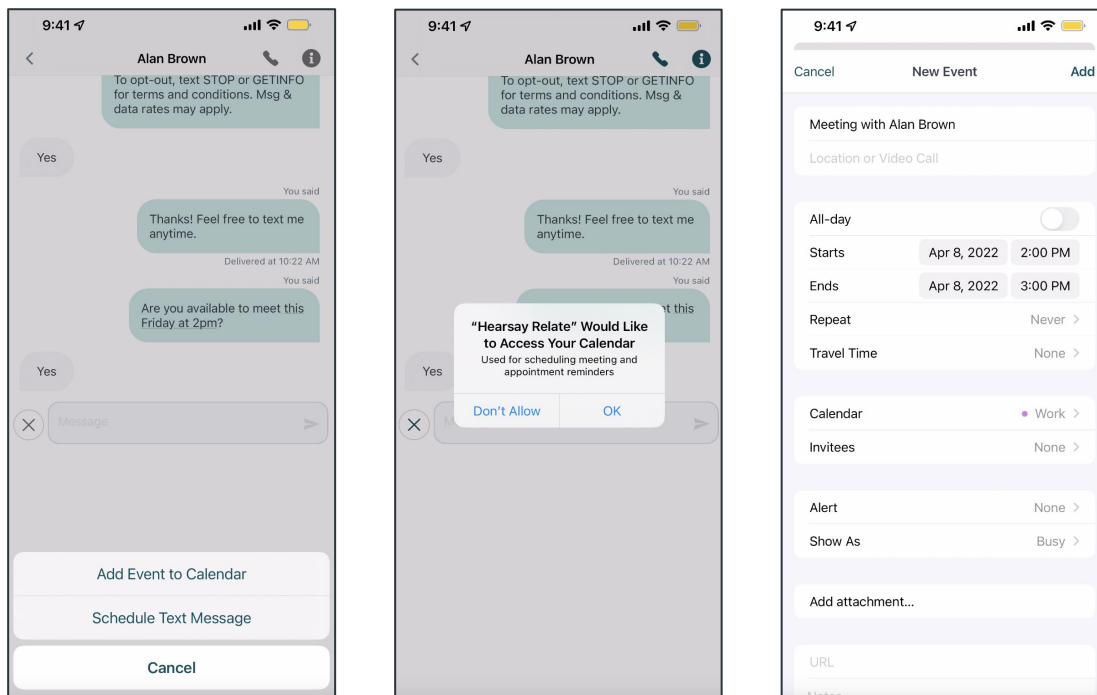
Schedule a Calendar Event

When using the Hearsay Relate app, you can schedule events directly from a conversation. Hearsay Relate will detect text messages that include a date and time and will underline this specific information. By tapping the underlined text, Hearsay Relate will prompt you to choose between:

- **Generating a Calendar Event:** Hearsay Relate will add an event to your mobile phone's calendar, including the name and phone number of your contact, at the date and time specified in the underlined text.
- **Scheduling a Meeting Reminder Text:** Hearsay Relate will present a templated reminder text message reminding your contact of your upcoming meeting, set at the underlined date and time.

To add an event to your calendar:

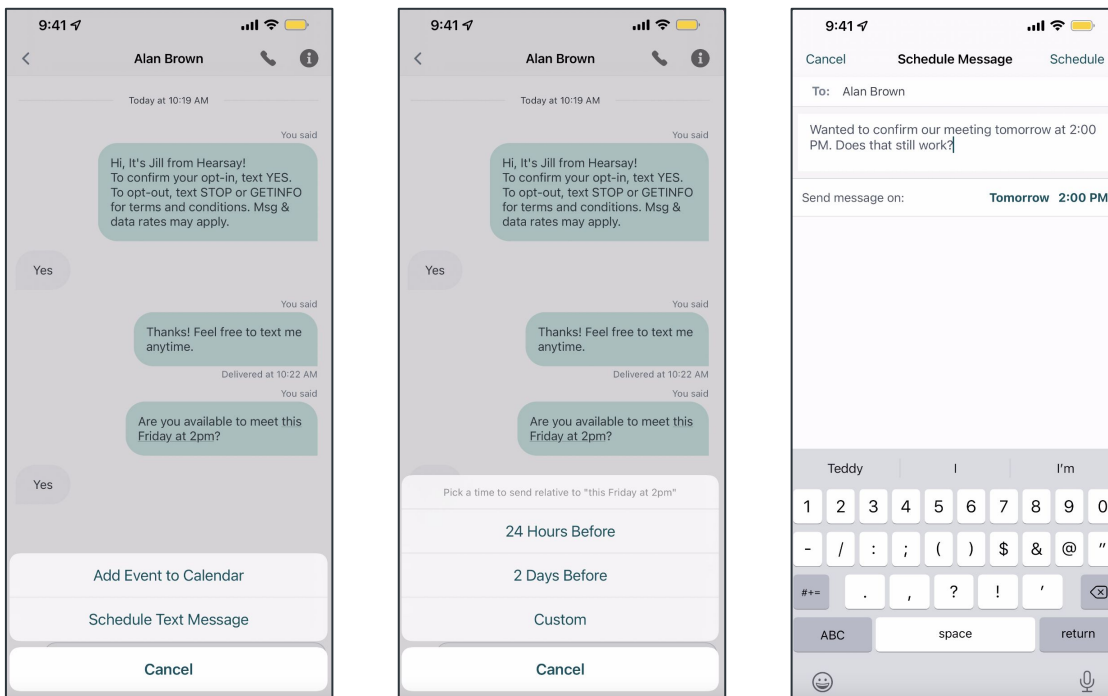
1. Open a conversation within Hearsay Relate. Hearsay Relate will detect and underline dates listed within your conversation. Hearsay Relate distinguishes the context in which the date is referenced such as this “Friday” “This Friday” and “Next Friday.”
2. Tap the underline date and a menu will appear. Tap **Add Event to Calendar** and Hearsay Relate will generate an appointment on your phone’s native calendar app, such as iCal for iPhone users.
3. Tap **Add** to finish this process.



Schedule a Reminder Text

To schedule a meeting reminder text:

1. Open a conversation within Hearsay Relate. Hearsay Relate will detect and underline dates listed within your conversation.
2. Tap the underline date and a menu will appear. Tap **Schedule Text Message** and pick a time to send relative to your meeting.
3. You can customize the text and Tap **Schedule** to finish this process.

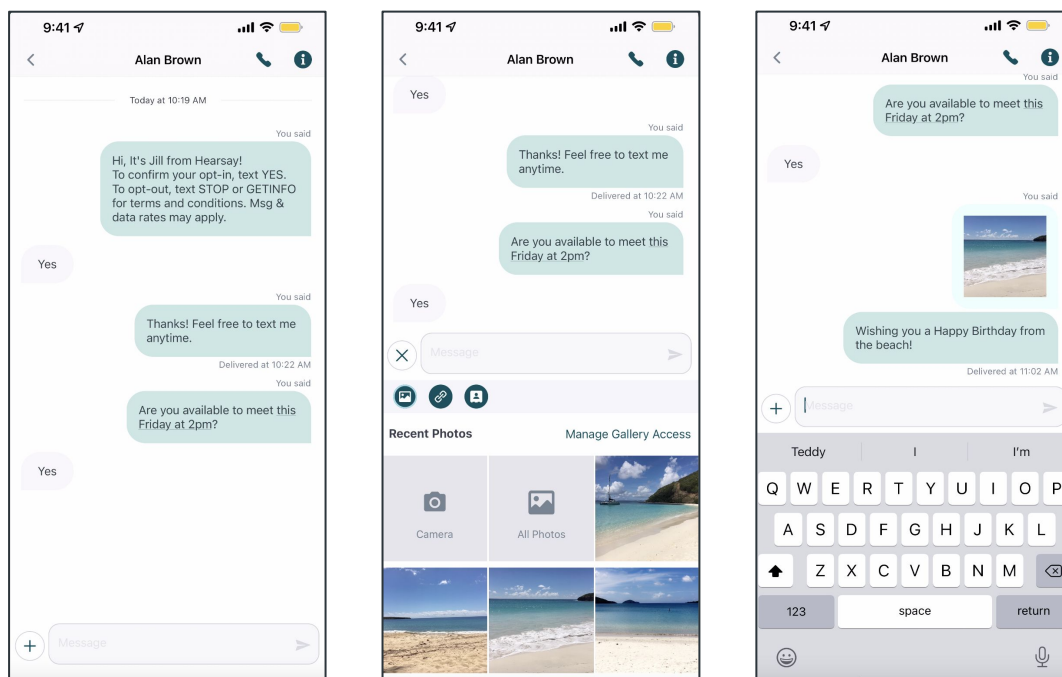


Share Images/Attachments in Text Messages

Grab your customer's attention and build relationships with visually engaging content like birthday wishes, report screenshots, and documentation photos. You can send outbound picture messages through Hearsay Relate by selecting photos from your camera roll or taking an in-app picture. Check your organization's compliance policy regarding the type of attachments you are allowed to send.

Follow these steps to send an attachment via the Hearsay Relate Mobile App:

1. Open a Conversation and tap the **+** button.
2. Tap the **Photo** icon.
3. The camera roll on your device will be shown in the app, giving you the option to pick a photo to send or initiate taking a photo, or opening the full photo gallery on the phone by clicking on **All Photos**.





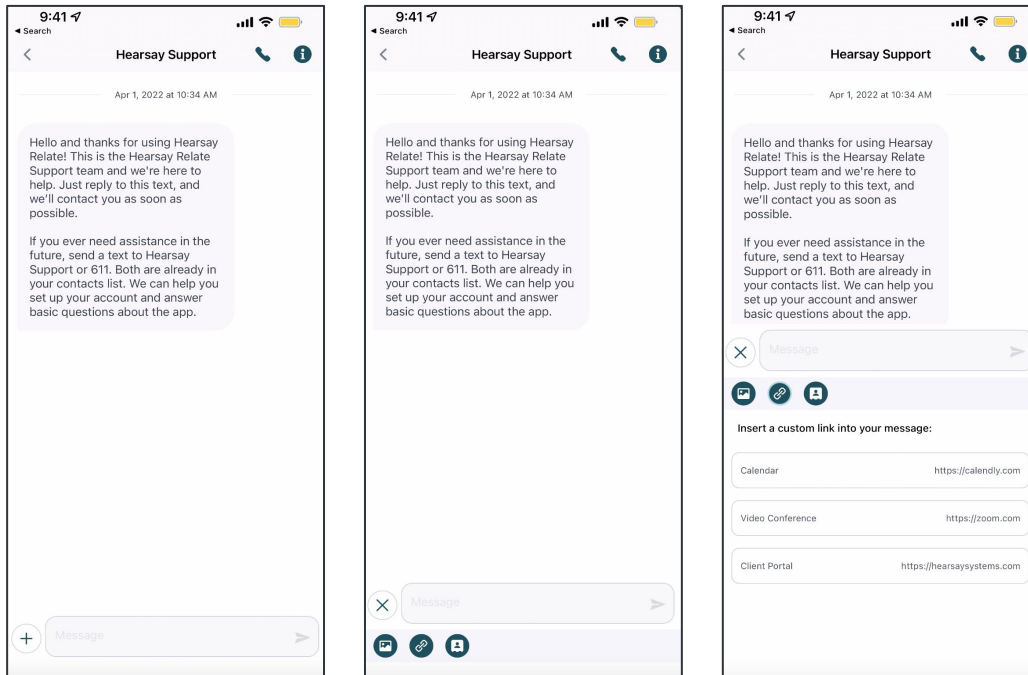
Important Notes for Users:

- Users can only send PNG or JPEG images (standard format for iOS and Android photos).
- If the photo was a live photo, it will be converted into a PNG when it is brought into the Relate platform.
- The maximum amount of media that can be sent is 2 MB.
- If a user tries to attach an unsupported file type like an MP4 video, an error message will advise the user to try to attach the file in a different format.

Share On-Demand Links in Text Messages

Once you've added links via the Account page on your desktop browser, you can attach them in text messages sent via the Hearsay Relate mobile app by following these steps:

1. Open a Conversation and tap the  button.
2. Tap the  symbol.
3. Choose one of your saved links to have it added to your text message.



Filter Conversations

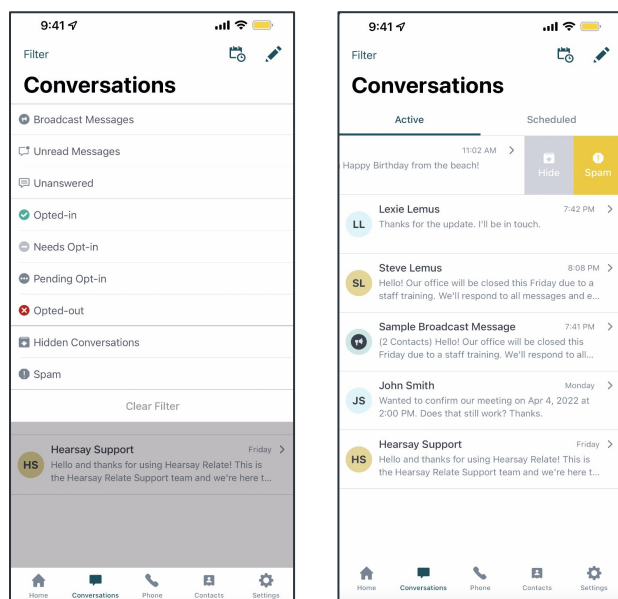
You can filter your conversations within Hearsay Relate by tapping Filter in the top-left corner of the Conversations tab.

Filter Options:

- **Broadcast:** Messages sent using the Broadcast feature
- **Unread Messages:** Messages you have not yet read
- **Unanswered:** Messages you have read but have not answered
- **Opted-in:** Contacts who have replied YES to your opt-in message
- **Needs Opt-in:** Contacts to whom you have yet to send the opt-in message
- **Pending Opt-in:** Contacts who have yet to answer your opt-in message
- **Opted-out:** Contacts who have replied STOP to your opt-in message
- **Hidden Conversations:** Conversations you have set to hide and are hidden from your main conversations list
- **Spam:** Conversations you have set to spam and will no longer receive incoming text messages from the contact

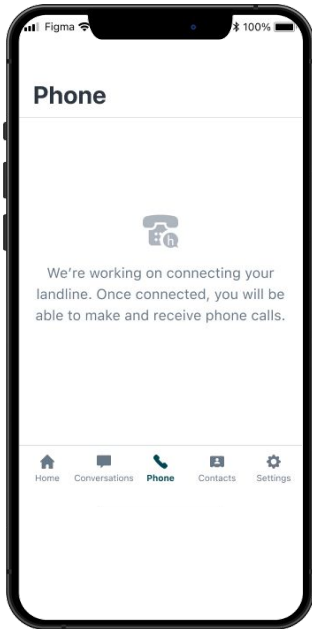
You can choose to hide or mark a conversation as spam from a conversation. In the mobile app, go to your Conversations tab. Starting on the right-hand side of a conversation, slide your finger toward the left to uncover the Hide and Spam labels.

- **Mark as Spam:** Removes the conversation from your Conversations window and blocks all incoming text messages from the contact.
- **Hide Conversation:** Removes the conversation from your Conversations window.

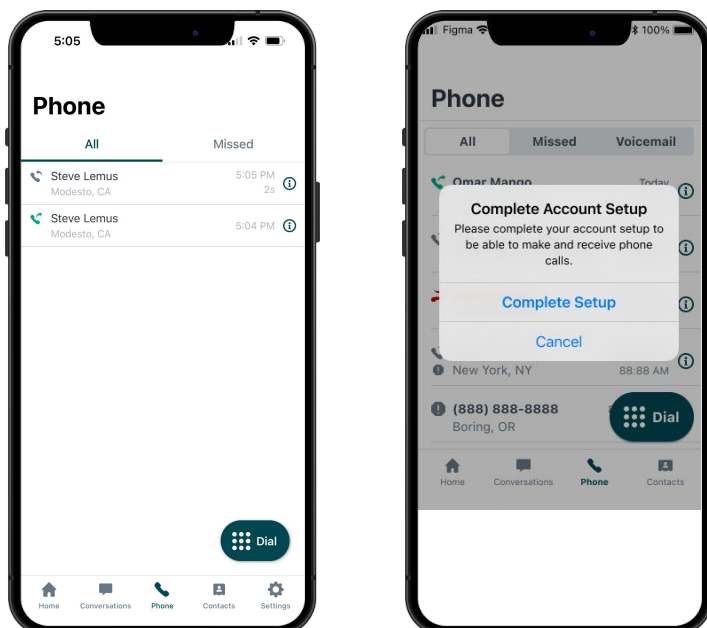


Phone

Clicking on the **Phone** tab will open up your call log in the Mobile app. If you are still waiting for your landline number to be provisioned, you will see a message on the screen informing you.



If you remove the connected device phone number but still have call logs available, you will be able to see the existing call log. If you click a number in the log or click on **Dial**, you will receive a message to complete your account setup. You will not be able to make a call from the app until you complete setup.



Using a Hearsay Relate dedicated phone number, users have the ability to make and receive phone calls directly from their new number.

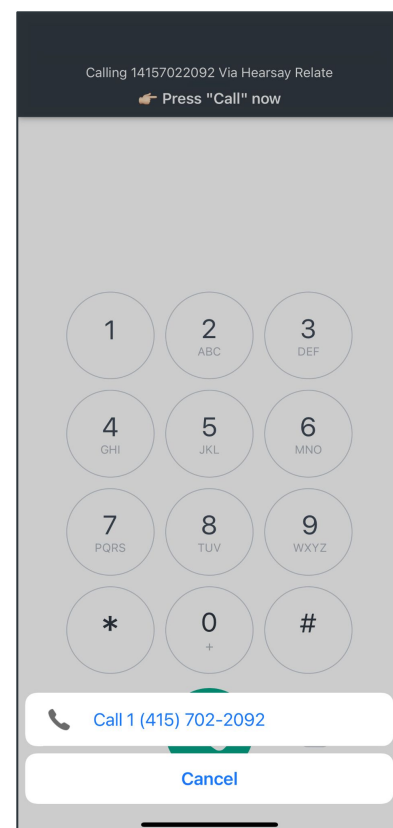
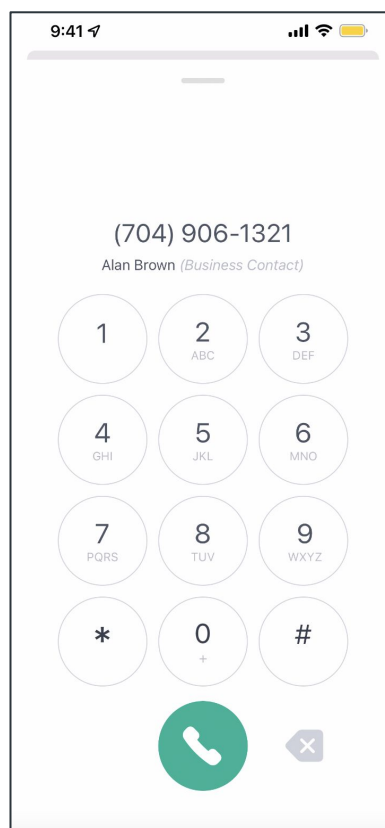
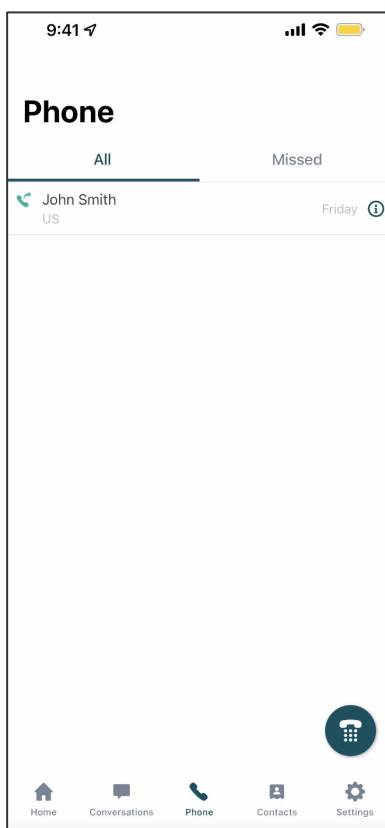
To make a call:

1. Tap the Phone button at the bottom of the screen and click the phone icon to bring up the dial pad.
2. Dial the number you wish to call.
3. Tap the green Phone icon to make the call.
4. Tap Call.

Review your Outbound/Inbound Calls

To review your outbound/inbound calls, tap the **Phone** button at the bottom of the screen.

- The All tab showcases your entire phone call history.
- The Missed tab showcases calls your Hearsay Relate number received, but were not answered.

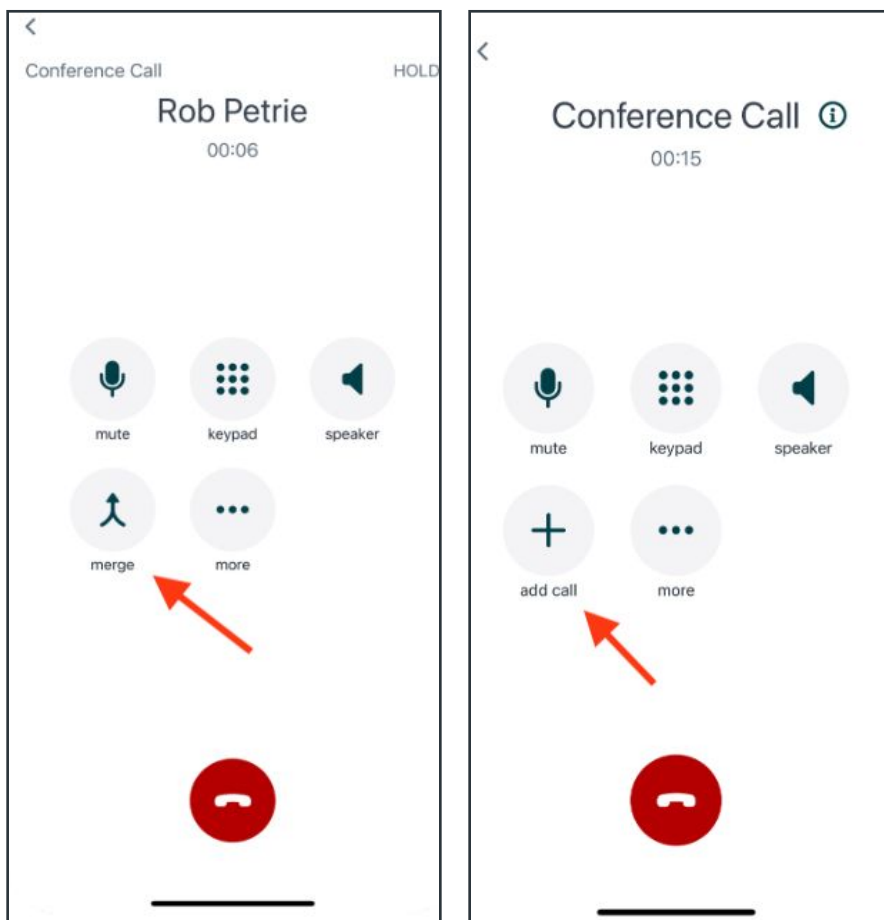


Add and Merge Outbound VoIP Calls

The Hearsay Relate mobile app allows you to add and merge and outbound call from the call screen within the Relate mobile app. This allows reps or members of a client household to join one call.

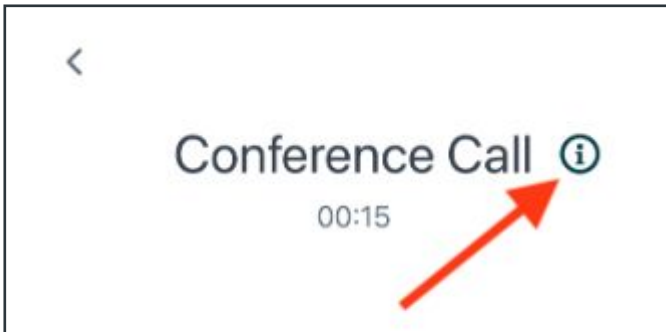
To merge one call to an existing outbound call, tap **Add Call** and select a number from your contacts or dial a new number on the keypad.

Once the call is connected, tap **Merge**. You can do this up to five times to add up to six numbers to the same call.



To view or remove participants:

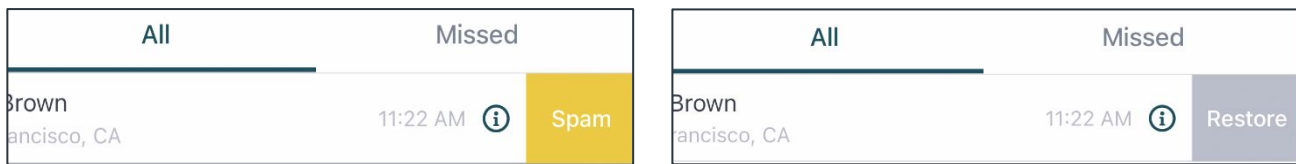
On iOS, tap the **i** symbol next to **Conference Call**.



Mark Calls as Spam

If you are receiving unwanted phone calls from contacts or telemarketers on your Hearsay Relate number, you can mark the conversation as Spam to block future incoming calls. Text messages from numbers marked as spam will be received but workspace members will not be alerted to these messages. They will be viewable only as Conversations under the Spam Messages filter.

To mark a call as spam, simply swipe left on the recent or missed call, then select “Spam.” If a call was inadvertently marked as spam, you can easily undo it by swiping left again on the call and select “Restore.”



Inbound Call Handling

Inbound call handling routes an incoming call to you and your workspace member's mobile devices at the same time, allowing everyone on your team the opportunity to answer the call.

Note: Your workspace members will need to download the Hearsay Relate Mobile Application and connect their mobile device to your workspace in order for this feature to work properly. Landline numbers do not support this feature.

Answering the Call:

- If a workspace member answers the call, that workspace member will be prompted to speak with the incoming caller.
- All other workspace member's mobile devices will default back to the phone's last action/screen.
- The call will appear under the All section within Hearsay Relate's Call History tab.

Missing the Call:

- If the call goes unanswered, the caller will be prompted to leave a voicemail.
- The call will be recorded under the Missed section of Hearsay Relate's Call History tab.

The Inbound Call Handling features provides four configurable options that workspaces can choose from:

- All calls go to all office members
- Directing calls to a dedicated office member
- Directing calls to the workspace owner
- Forwarding calls to an office landline number

The default option is *All calls go to all office members*. This setting directs all members of the workspace that have downloaded the Hearsay Relate app to have their phone ring. Once the first member answers the call, all other member's phones will stop ringing.

The second option is *All calls go to a designated office member*. This setting allows a workspace to indicate a specific workspace member to receive all inbound calls that are placed to the Relate phone number. If this option is selected, when a call comes in to a given Relate workspace, only that individual's phone will ring. No other phones of workspace members will ring. The advantage of this setting is that a workspace can always ensure that a designated member of their team is teed up to receive calls from clients. Changing which workspace member receives calls is as simple as selecting their name from the list and now only their mobile phone will ring for inbound Relate calls.

The third option is *All calls go to Workspace Owner*. This setting allows a workspace to route all inbound calls that are placed to the Relate phone number to the Workspace Owner. If this option is selected, when a call comes in to a given Relate workspace, only the workspace owner's phone will ring. No other phones of workspace members will ring.

Inbound Call Handling

☒ All calls go to all office members (Default)

☐ All calls go to a designated office member

☐ All calls go to Workspace Owner

☐ All calls go to office number

Cancel Save Changes

The fourth option is *All calls to office number*. This setting allows a workspace to forward Relate phone calls to an existing landline office number. There is a validation process to ensure that the phone number entered is correct. Once a workspace member enters the phone number, they will receive a call with a code and will need to input it correctly to save the number. There is an optional field for offices that have extensions (also known as an Interactive Voice Response system or IVRs). This field instructs our automated system on how to navigate the user's phone directory or extension system. Users can enter "w", instructing our system to wait for 0.5 seconds and then entering 0-9, #, or * to tell our system which tones of the dial pad to play in order to navigate the phone directory.

Inbound Call Handling

☐ All calls go to all office members (Default)
☐ All calls go to a designated office member
☐ All calls go to Workspace Owner
☒ All calls go to office number

Connect your office number by entering it below.

Office Number **Extensions (optional)** ⓘ
 (###) ###-#### #123 Call to Validate

Cancel Save Changes

For example, the Insurance Office of Jane Smith has an extension system that has the following steps that need to be taken to get to the right extension:

- Dial 1 for individuals within this office
- Dial 24 for Jane Smith's extension

Jane Smith would need to call her extension and measure the time before each option is available. She does this and identifies that the first option can be selected after 3 seconds and the second option can be selected after 5 seconds. In the Extension field for this feature, Jane would need to enter the following: "wwwwww1wwwwwwwwww24"—ensuring our system can dial the correct extension automatically in order to deliver the one-time code so the user can verify their landline.

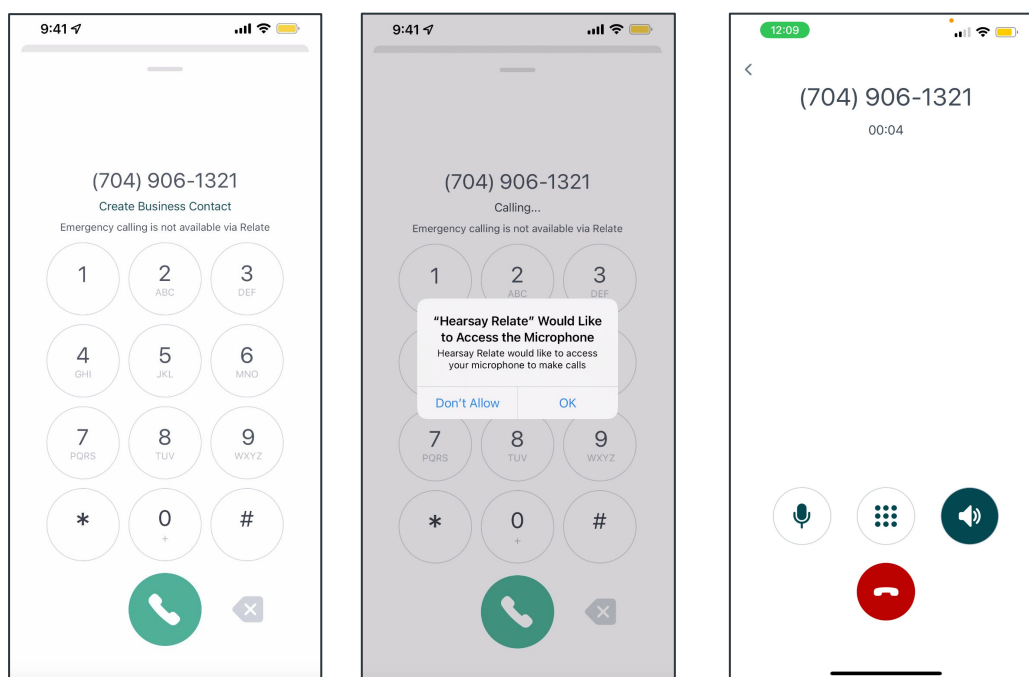
Once this option has been set up, all inbound calls to the Relate phone number will be directed to the landline number but the caller still needs to navigate the advisor's extension system. Workspace members' personal devices that are set up with Relate will not ring. The advantage of this setting is that calls will always be directed to the office where they can be answered by a team member or directed to the office voicemail.

Make Outbound Hearsay Relate Calls from Mobile (Outbound VoIP)

With this feature enabled, users of the Hearsay Relate mobile app can make calls using VoIP technology. Calls will be made all within the Relate App. **Note: To use this feature, Relate users must enable microphone permissions for the application. These permissions can be found within your mobile device's Settings.**

Open up the Relate App and a call can be placed from these locations within the app:

1. The contact details
2. The dialpad (inputting a number)
3. Recents/Missed calls
4. From the conversation



FAQs about making calls through VoIP

Q: Does VoIP have any effect on outbound Caller ID?

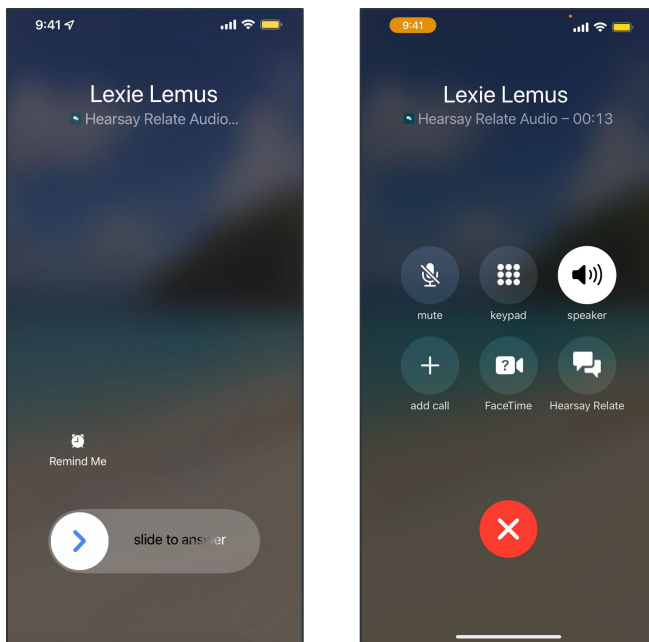
A: No, if the person you are calling has your Relate number saved as a contact it will appear with that information in your recent calls. Otherwise the call will just appear with your Relate number and no further contact info.

Q: Can I navigate to other places on my phone with an ongoing call?

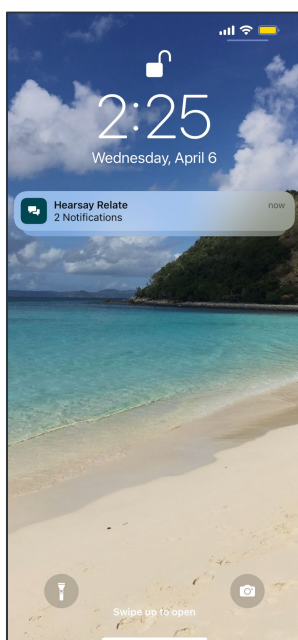
A: Yes but fully closing the Relate app will end the call.

Answer Incoming Hearsay Relate Calls from Mobile (Inbound VoIP)

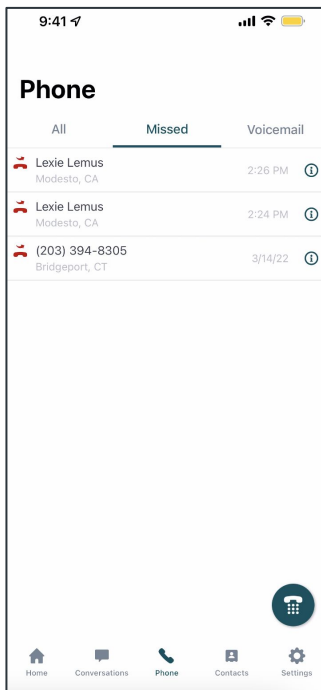
Users of the Hearsay Relate mobile app with this feature enabled can receive calls using VoIP technology. This also includes a revamped Caller ID that is both reliable and easy to use. When enabled, calls are answered via the Relate application. Active incoming calls will appear with the contact's name or number and a Hearsay Relate Audio subheading with the Relate logo. These calls have their own unique Hearsay ringtone and notification sound.



Missed Calls will appear as push notifications on the locked screen or while using the device.



Missed Calls will also appear in the native call logs on iOS and tapping a missed call will open Relate. A missed call on Android will not appear in the native call logs, just as a push notification and within Relate. Within the Relate app, missed calls will appear in the Missed tab.



FAQs about receiving calls through VoIP

Q: When I'm using VoIP, what happens if I'm logged out of the Relate app and I receive a call?

A: If you are logged out you should not receive the call or the push notification for the call.

Q: When I'm using VoIP, what happens if I'm currently active in one workspace and a call comes in to another workspace? (For multi-workspace users)

A: You should still receive the call even if you are in another workspace. Push notifications for calls are tied to the User ID not to the workspace. When answering the call it will open the app in that workspace.

Q: Can I add someone to my current call? (call merging)

A: Not at this time.

Q: While I am on a Relate call can I receive other calls?

A: Yes.

Note: We do not handle 911 calling from Relate with VoIP. When calling 911 the following message will play "Emergency calling is not available via Relate. Please use an alternate means to contact 911."

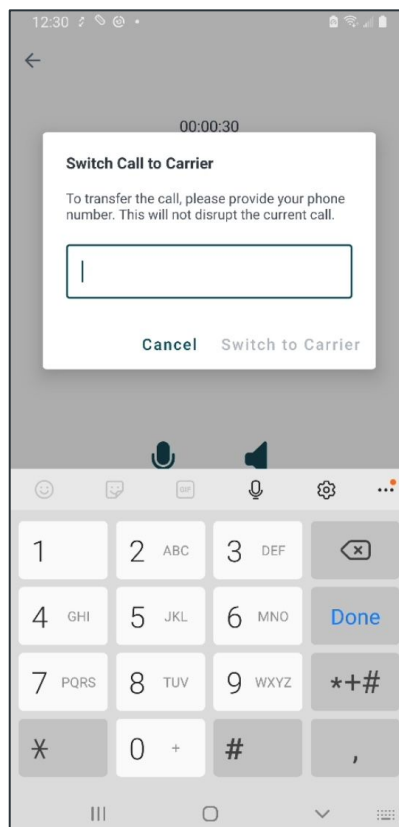
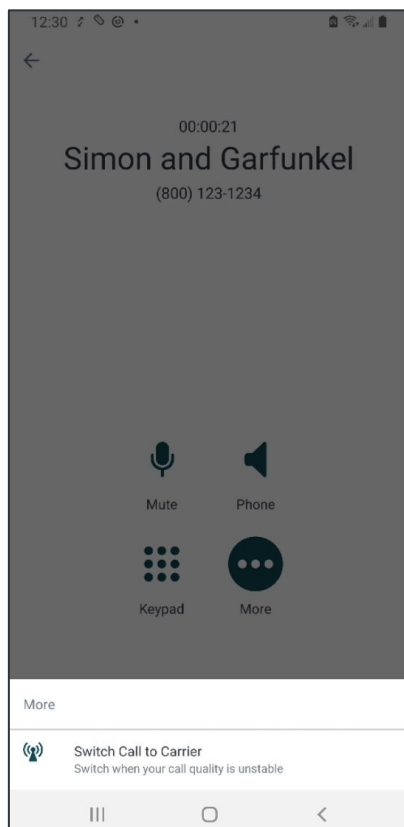
Switching a VoIP Call to Cellular

Hearsay Relate users that have VoIP enabled can proactively transfer a VoIP call to their mobile phone without disrupting the conversation. Seamlessly transferring the call to your cellular carrier helps to improve VoIP call quality issues due to a slow or unstable internet connection.

From a Hearsay Relate mobile VoIP call, “Switch Call to Carrier” initiates an inbound call to swiftly move to cellular without notifying the other caller.

To transfer a VoIP call to cellular:

1. On the VoIP call screen, click **More (...)**
2. Click **Switch Call to Carrier**. Enter your mobile phone number, and then answer the incoming call on your mobile phone to continue the conversation. **Note:** After you’ve transferred your first call, your mobile phone number is saved and you don’t need to enter it again.



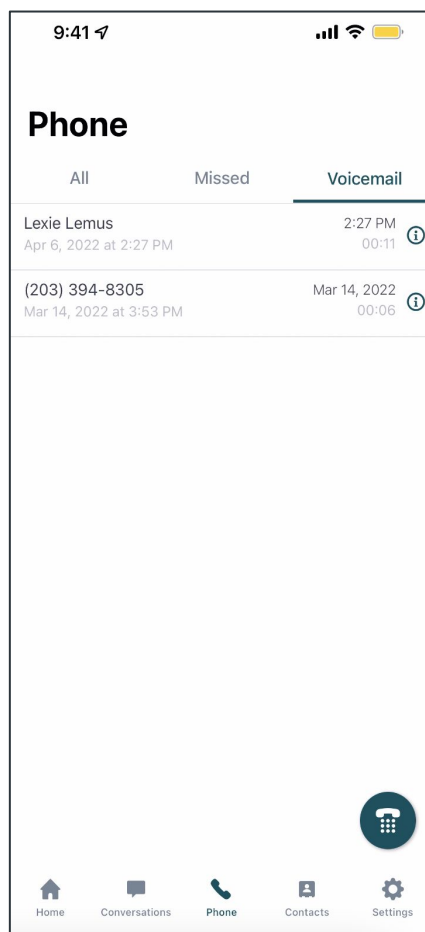
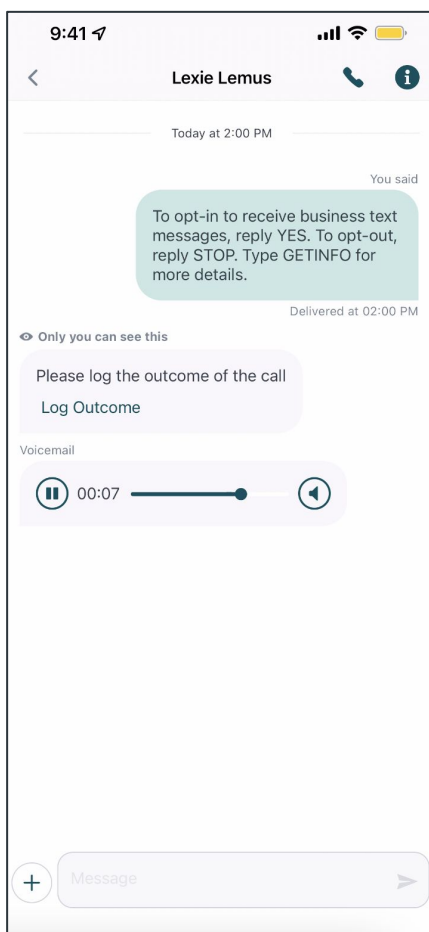
This feature is only compatible with U.S. phone numbers. Your organization must have VoIP enabled to use this feature.

In-App Voicemail

Users of the Hearsay Relate mobile app with voicemail enabled can listen to a voicemail message directly from a Relate conversation as well as from the Voicemail list. In-app voicemail increases productivity and improves the client experience by allowing any workspace member to respond to voicemails.

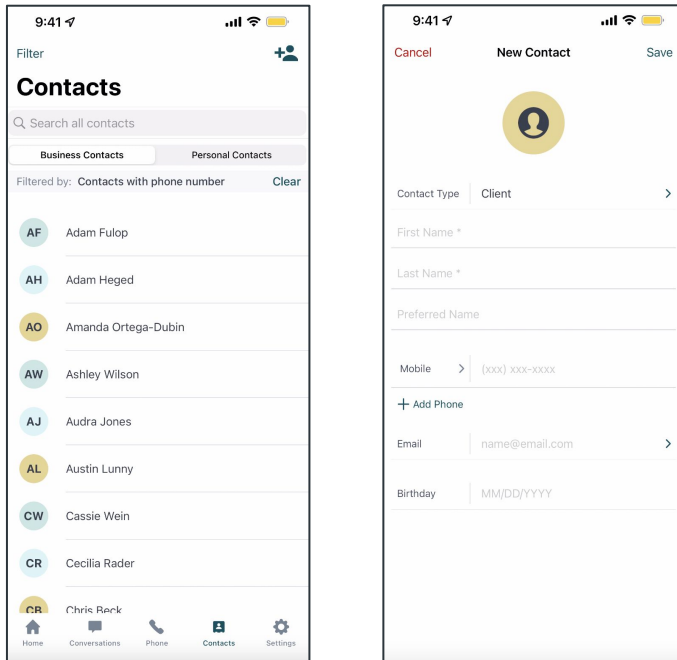
When voicemail is enabled and you receive an inbound call, the phone will ring for approximately 40 seconds and then go to voicemail if no one answers. The caller will hear either the standard greeting or the custom greeting (if set). After you have missed an inbound call, the voicemail will now show up in the conversation as well as in the Voicemail List. This list can be found by navigating to the phone tab and selecting Voicemails from the top navigation bar.

Whenever a voicemail is received, a push notification will appear on your mobile device to inform you that you have a new voicemail.

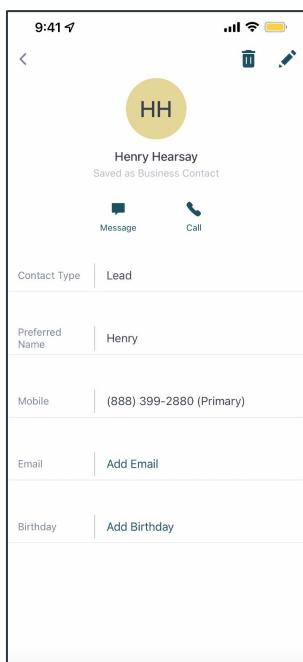


Contacts

Contacts can be added individually in the Hearsay Relate app. You'll need to click on the Contacts tab and then click on the icon to add a person. Enter in the information and save the contact. Make sure to grant Contacts permission within the Personal Contacts tab.



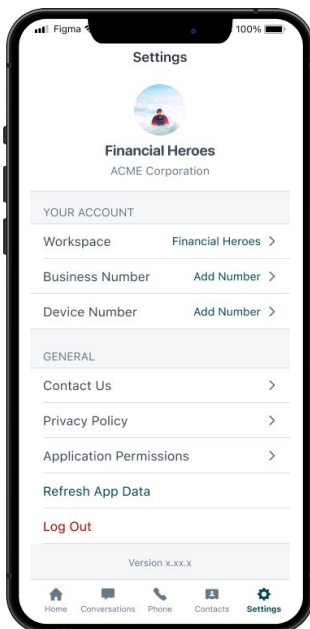
Once you have added a contact, you can text and call them directly from the Contact view. You can also edit the contact by selecting the pencil icon on the top right corner of the app.



Settings

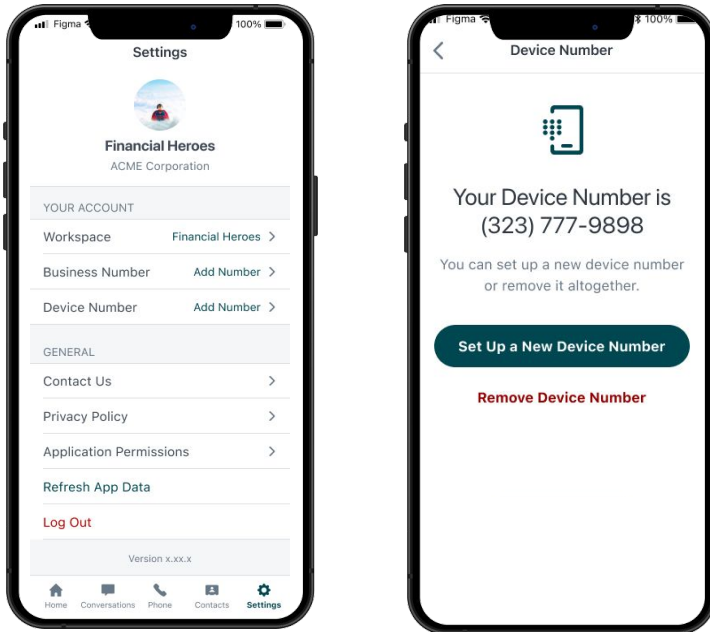
The Settings tab shows you information about your account. You can find the following on this tab:

- **Workspace:** Hearsay workspaces can only contain one Hearsay Relate account at a time. If you have multiple Hearsay Relate numbers, it is likely you have multiple Hearsay workspaces.
 1. To toggle between workspaces, tap **Workspace**.
 2. Choose the desired workspace to swap to the associated Hearsay Relate number.
- **Business Number:** This is the number you are currently using with your Hearsay Relate account. This is the number your contacts see when you text them.
- **Device Number:** This is your cell phone number and enables you to use Hearsay Relate's call/voice features.
- **Contact Us:** Enables you to send a message to Hearsay Support.
- **Privacy Policy:** Redirects you to Hearsay's Privacy Policy on the company's official website.
- **Application Permissions:** Redirects you to the applications you have granted Hearsay Relate access to.

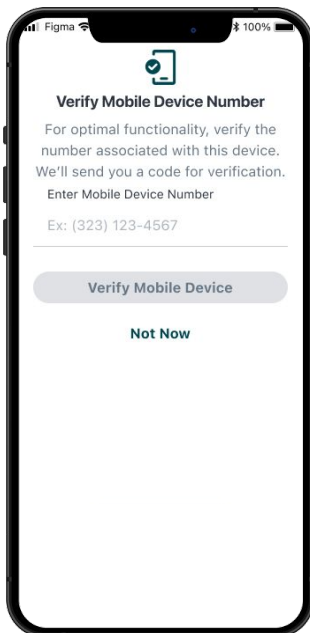


Edit or remove your device number

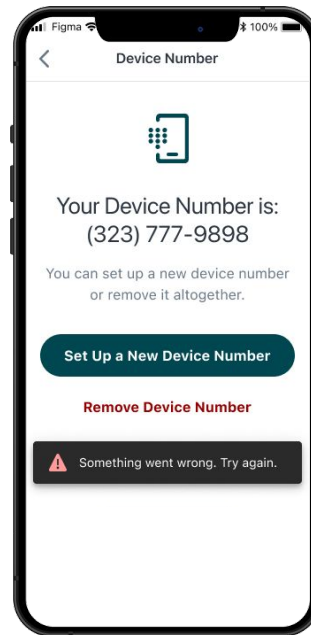
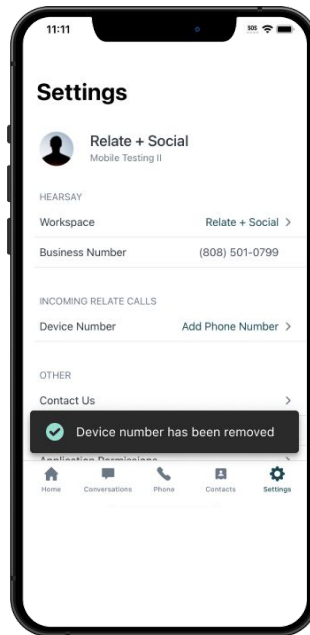
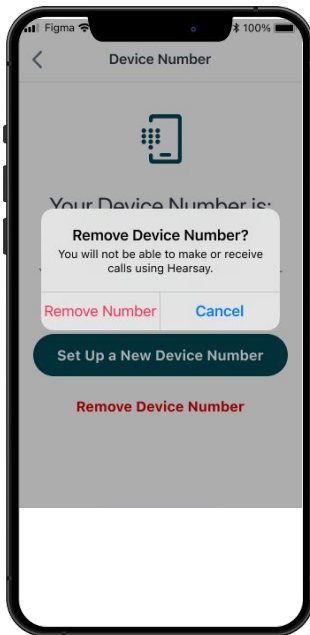
1. To edit or remove your device number, you will go to your **Settings** tab. Click on the dark teal device number. This will open the next screen to set up a new device number or to remove the current device number.



2. Click **Set Up a New Device Number** to update the connected mobile device number. This will initiate the same process as on [page 52](#).



- Click **Remove Device Number** to completely remove the connected device number. If the number is successfully removed, you will receive a confirmation and the device number will now show an option to **Add Phone Number**. If it was not successful, you will see an error.

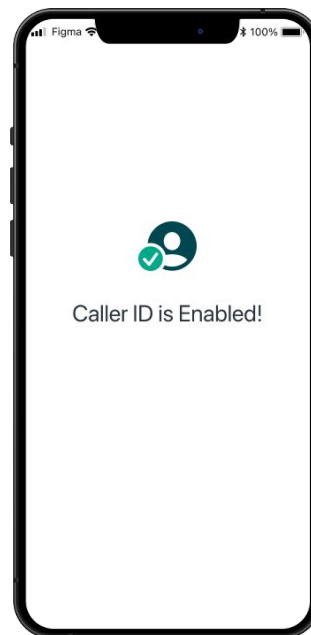
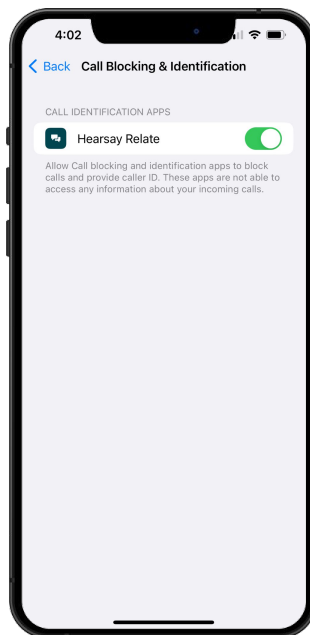
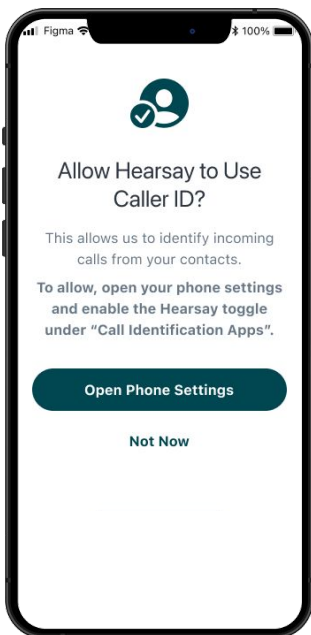


Permissions

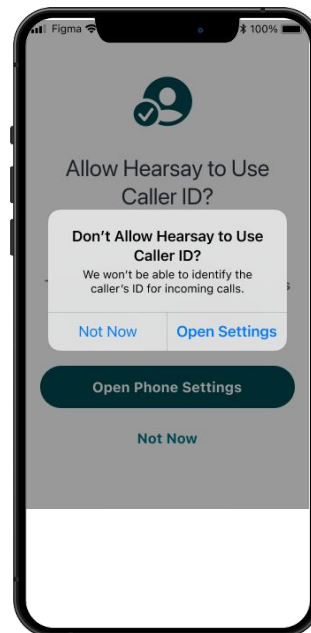
There are a number of different permissions in the Mobile app that will optimize your Hearsay experience.

Caller ID

1. To enable Caller ID, tap **Open Phone Settings**. You will need to open your phone settings, click on **Phone**, and then click **Call Blocking & Identification**.
2. If it isn't already green, toggle the slider to give Hearsay Relate permission to provide Caller ID. Tap the back button to take you back to the Mobile app and you will get the confirmation that Caller ID is enabled.

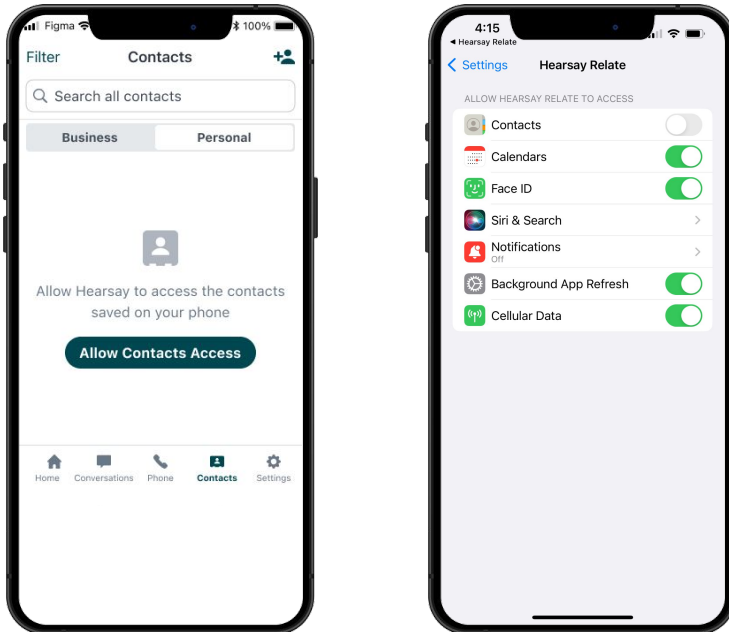


If you select **Not Now**, then you will be taken back to the **Home** tab. You can click on **Settings** at any time to trigger the prompt to open your phone settings.



Contacts

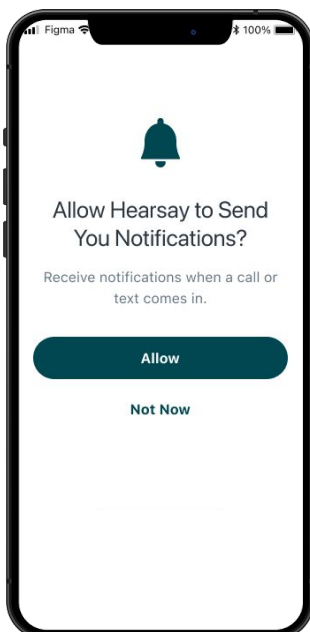
When you tap on the **Contacts** tab, you will have the option to all Hearsay to access the contacts on your device. Tap **Allow Contacts Access** to open the permissions on your device. You can toggle the slider to the right to give the app access to your contacts.



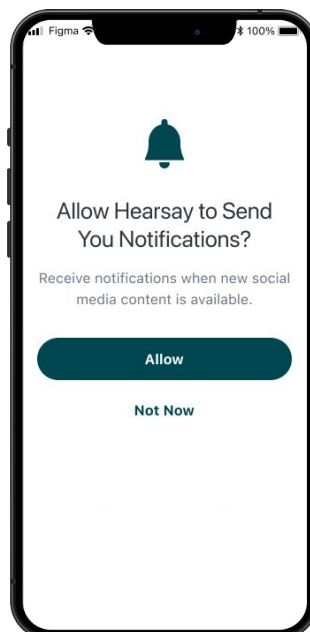
Notifications

You can enable notifications for the Mobile app so you'll receive alerts when there is new activity. If enabled, you will receive Push notifications on your mobile device's lock screen. This can be toggled off in your mobile phone's settings and notifications section.

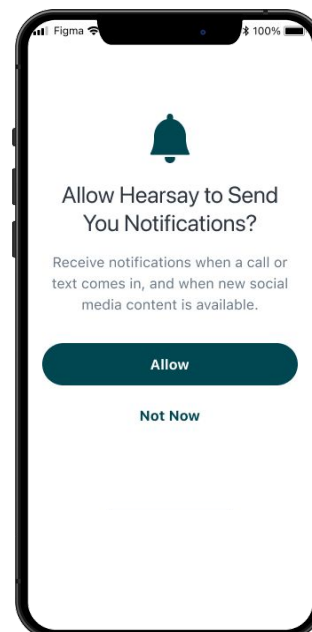
Relate only



Social only



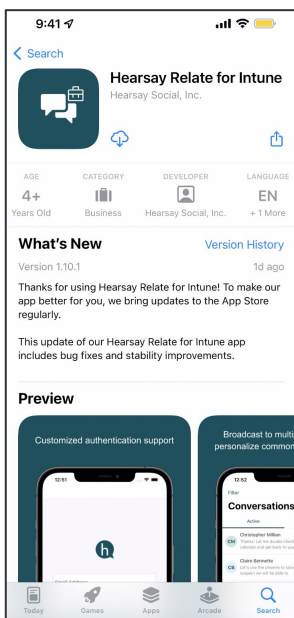
Relate + Social



Hearsay Relate for Microsoft Intune

Hearsay Relate can also be accessed in Microsoft's mobile application management platform Intune, ensuring corporate data is secure while empowering advisors to engage clients from a protected Bring Your Own Device (BYOD) environment. Hearsay Relate for Microsoft Intune enables advisors to manage and nurture their book of business in a protected BYOD environment with mobile application management (MAM). This version of Hearsay Relate allows IT administrators to protect corporate data. The application is available for iOS and Android, downloadable from the App Store, Play Store, or Microsoft Intune storefront.

If your organization has configured Hearsay Relate for Microsoft Intune, check with your administrators for organization-specific guides on downloading the application through your BYOD environment.



Biometric & In-App PIN Security

To protect your account in the event that your mobile phone is compromised, Hearsay Relate adds a layer of security in the form of a PIN, fingerprint or facial identification. The registration of these characteristics is associated with your device only and is not stored by the Hearsay Relate app.

To unlock the application, the Relate application will leverage the mobile device's preferred security method—facial recognition, fingerprint or PIN—to provide nearly instant access to secure conversations.

There are two forms of security protection:

- **Biometric:** This is a security process that relies on the unique biological characteristics of an individual to verify that person is a registered, approved user on the device to unlock an application.
- **In-App PIN:** This is a code that is tied to an application on a specific device. For example, if you are using Hearsay Relate on two different devices and have In-App PIN enabled, each mobile device will have a different PIN code.

FAQs about Biometric & In-APP Pin Security:

Q: Can PIN and biometric security be combined?

A: Not at this time.

Q: If biometric fails, can a fallback be set to a PIN?

A: No, the agent/advisor needs to use biometric to unlock the application. Otherwise, they will need to log in to Relate with credentials.

Q: Where is a user's biometric data stored?

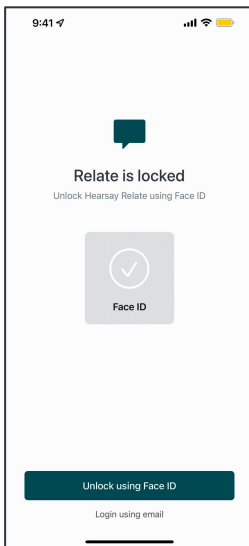
A: Biometric data is not stored by Hearsay Relate. The biometric data is stored on the device. The advisor's own device validates whether or not the biometric scan matches what it has recorded (whether it is fingerprint or FaceID). If the scan matches, it returns a Yes, and the application unlocks; if it returns a no, the application does not unlock. If the biometric unlocking fails the maximum number of times (3 times on iOS, 5 times on Android), the user will need to log in to Relate via email.

Biometric

If your organization enables Biometric, upon opening the Hearsay Relate mobile app, you will be prompted to secure your biometric recognition.

- **iOS:** Users will need to grant permission for FaceID or TouchID (depending on their device model).
- **Android:** If the user has fingerprint scanning set up on their device, the Relate application will use this as an unlocking method if this feature is enabled.

When an inactivity timeout occurs and the Relate application is opened, you will be prompted to unlock the application using the biometric method available on your device.



In-app PIN

If your organization enables In-app PIN, you will be asked to set it up on your iOS or Android device the next time you launch the Relate mobile application.

- You will need to set a 4-digit PIN that you will use to unlock the application which must be entered twice to set.
- When an inactivity timeout occurs, you will be prompted to unlock the application using the 4-digit PIN that you set.
- If the mobile login fails, you will have to log in via email and reset their 4-digit PIN. You will not be able to use your previously used PINs.

If the phone does not have biometric capabilities (older Android devices, for example), PIN or pattern will be used to unlock the Hearsay Relate application.

Hearsay Relate Best Practices

Know When to Text

Texting is an earned privilege. It's most effective when used properly. Be sure to send texts at the appropriate time of day.

Be Concise

The beauty of texting is that it's acceptable and appropriate to keep your message short. Be concise. This is especially true if you are typing on the desktop web interface. Say hello and then get to the point. Customers want you to be concise. Don't ramble.

Set Professional Boundaries

It's easy for texting to feel familiar—it's an intimate channel that can be used to communicate with faraway parents, partners and close friends. As an agent, on the other hand, you don't fit neatly into these categories, and although texting can feel familiar and friendly, you need to maintain a business relationship with your customers.

Text as part of a Broader Close Strategy

Use texting as a means to communicate when it makes the most sense, and when it is the customer's preferred method of contact. In general, texting is a good way to set up meetings, send reminder messages or obtain information from a customer, without having to make a call. For example, if you are running late for a meeting and have your customer's consent, go ahead and send a text to let them know. Or if you need to obtain a VIN in order to complete an application, texting may be the quickest way to obtain that information. Always keep your customer's contact preferences in mind; some people will want to catch up or ask you questions over text, while others will prefer a traditional phone call or email.

Be Yourself

Nobody wants to feel like they're texting with an automated machine, and texting gives you the opportunity to be yourself and interact with a customer in a casual way. Moreover, texting allows you the time to think about what you're going to say (before you type it) and respond thoughtfully. When done right, texting may be a crucial component of your digital strategy. By texting at the right moments, you may build deeper relationships and ultimately amplify business results.

Add your Hearsay Relate number to your business card and email signature. Once you have installed the app and retrieved your new Hearsay Relate number, add the number to your business card and email signature to let clients know what number to text.

Add events to your calendar. If you send a text that includes a date and time, the date and time will become a link. Click the link and click Add Event to Calendar to add the meeting to your calendar. You can specify the event name, location and time.

Schedule text reminders. To remind a client about an upcoming meeting, schedule a text reminder so that the person is notified in advance of the meeting. There are two ways to do this:

- If you send a text that includes a date and time, the date and time will become a link. Click the link and click Schedule a Text Reminder. From there, you can customize the reminder message and select a day and time for when you want that text delivered to your contact.
- At the bottom of the app interface, click Scheduled and then click Schedule Text Reminder. Type in your contact's name and then write a reminder message. You can select a day and time for when you want that text delivered to your contact.