Social Admin Guide

Hearsay Social Admin Guide
Last Updated: August 2025

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Hearsay Social is the leading social selling solution for the financial services and insurance industries, helping advisors and agents harness the power of social media to grow their business. It automates top-of-funnel marketing activity, identifies key selling opportunities, and drives 1:1 advisor/client engagements. Hearsay Social enables the advisor to focus on the most important part of their job—building and servicing relationships—without heavily investing time in social media management or worrying about compliance.

This guide enables admins to manage and supervise their organizations' social media programs across multiple networks while ensuring compliance policies are met.

Product Overview

Hearsay Social is built on top of the Hearsay client engagement platform, the pre-eminent omni-channel digital engagement center for the financial services advisor. It binds the most effective marketing, acquisition, and servicing channels into one ecosystem, enabling agents and advisors to focus on the most important part of their job—building client relationships—without the friction of switching between systems or the fear of compliance backlash. Our social solution helps advisors use technology to strengthen human relationships, not replace them, and is used by more than 200,000 users around the globe.

HEARSAY SOCIAL FEATURES

With Hearsay Social, you can:

- Publish pre-approved content
- Share automated content
- Create original content
- Modify content
- Monitor social signals
- Respond to messages
- Post comments
- Organize your contacts
- Create compliant social profiles
- Follow Recommended Actions for guidance

GET SUPPORT

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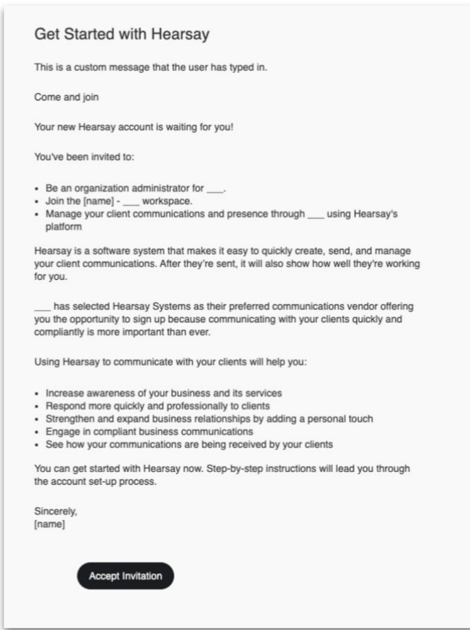
HELP CENTER
https://success.hearsaysocial.com/hc/en-us

Technology should strengthen human relationships, not replace them.

Getting Started

The first thing you'll need to do is accept your invitation from Hearsay Systems to activate your Hearsay Social workspace.

1. Check your email for the invitation to Hearsay Social. Then select **Accept Invitation**.



Get Started with Hearsay

This is a custom message that the user has typed in.

Come and join

Your new Hearsay account is waiting for you!

You've been invited to:

- Be an organization administrator for ___.
- Join the [name] - ___ workspace.
- Manage your client communications and presence through ___ using Hearsay's platform

Hearsay is a software system that makes it easy to quickly create, send, and manage your client communications. After they're sent, it will also show how well they're working for you.

___ has selected Hearsay Systems as their preferred communications vendor offering you the opportunity to sign up because communicating with your clients quickly and compliantly is more important than ever.

Using Hearsay to communicate with your clients will help you:

- Increase awareness of your business and its services
- Respond more quickly and professionally to clients
- Strengthen and expand business relationships by adding a personal touch
- Engage in compliant business communications
- See how your communications are being received by your clients

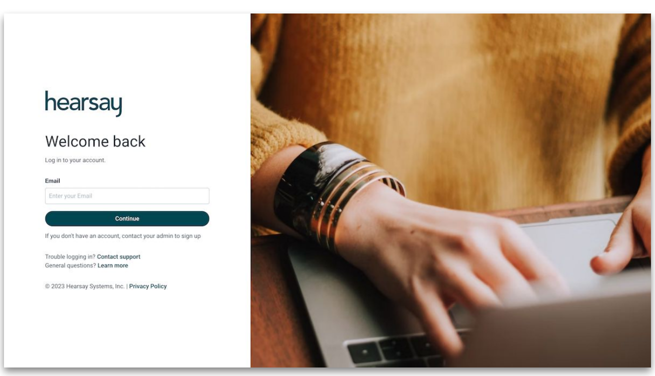
You can get started with Hearsay now. Step-by-step instructions will lead you through the account set-up process.

Sincerely,
[name]

Accept Invitation

Alternatively, click on the signup link in the email you received.

2. Follow your organization's login method which could be via Facebook, LinkedIn, or your company login through single-sign on.



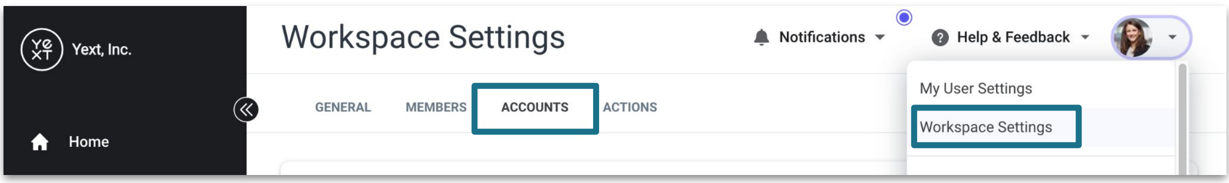
Note: Remember to always log in using the same method and platform you used to sign up for **Hearsay Social**. If you are unsure of which login method to use, contact your social program administrator.

Connect Accounts

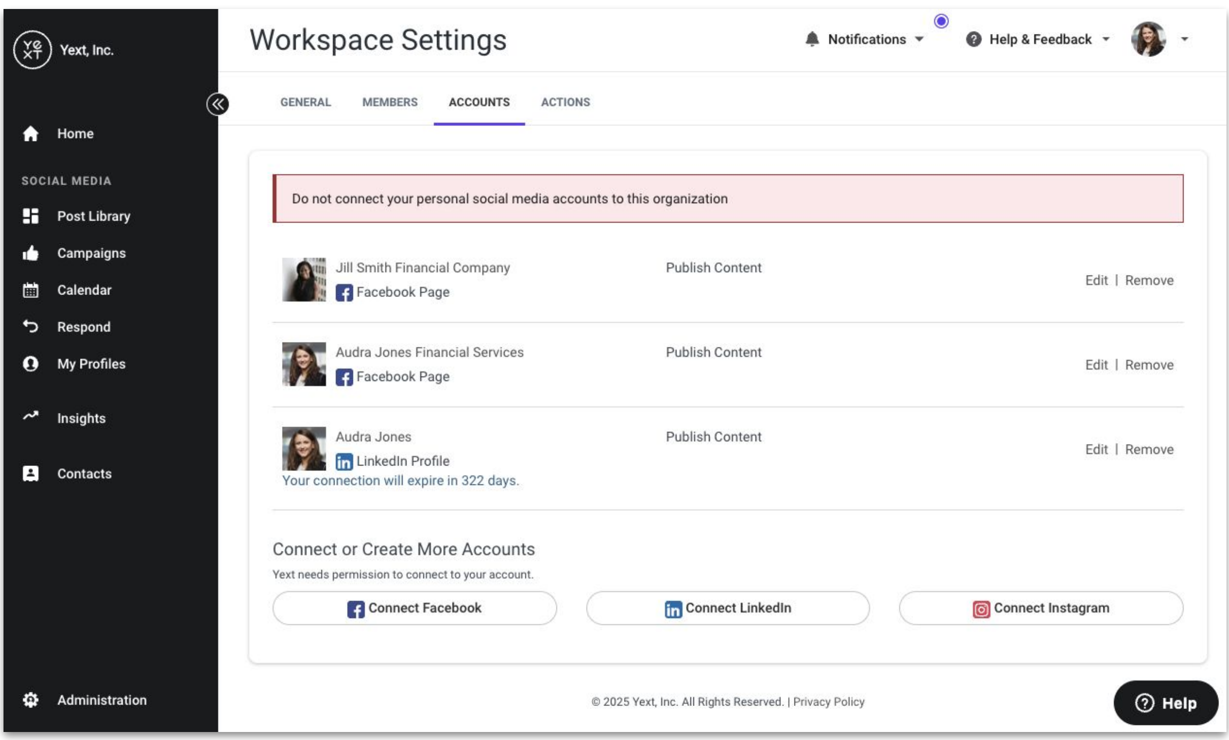
A key part of your social media experience and engagement is managing the social accounts you have linked to Hearsay Social.

To connect your social media accounts to Hearsay:

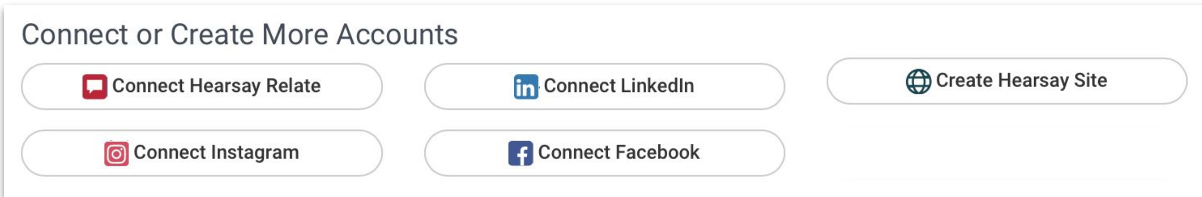
1. From the **User Dropdown,** select **Workspace Setting > Accounts**



2. Any connected accounts will be listed on this page along with the account type.



3. To connect a social account to Hearsay, select the Connect button associated with the social media account you would like to add.



PROFILE ACCOUNTS

Profile accounts are for individual use and must be held under an individual name.

- When connecting LinkedIn or Twitter, you will be prompted to enter in your profile login credentials.
- After successfully logging in, you will be prompted to first choose your profile and then click Finish to complete the process.

BUSINESS PAGE ACCOUNTS

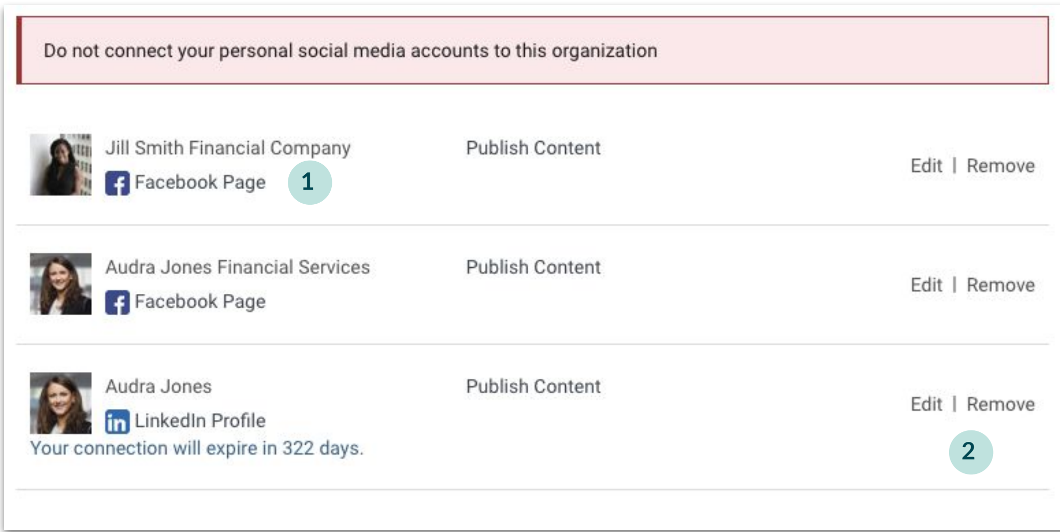
Business Page accounts are assets owned by a profile.

- When connecting Facebook or Instagram, only business pages can be connected to Hearsay Social. Personal profiles cannot be connected to Hearsay Social.
- To connect, you will be prompted to first enter your personal login credentials.
- Once logged in, you will be prompted to connect a business page your profile either owns or administers.
- Check the box for the correct business page and click Finish.
- Once your business page is connected, Hearsay drops the connection to your profile entirely and only monitors your business page.
- If you are alerted “No Accounts to Connect,” this means your profile does not own or administer a business page and you will need to reach out to your organization’s social media team for assistance.
- LinkedIn allows LinkedIn company pages to be connected to Hearsay. The process is the same as for connecting a LinkedIn personal profile.

Manage Social Accounts

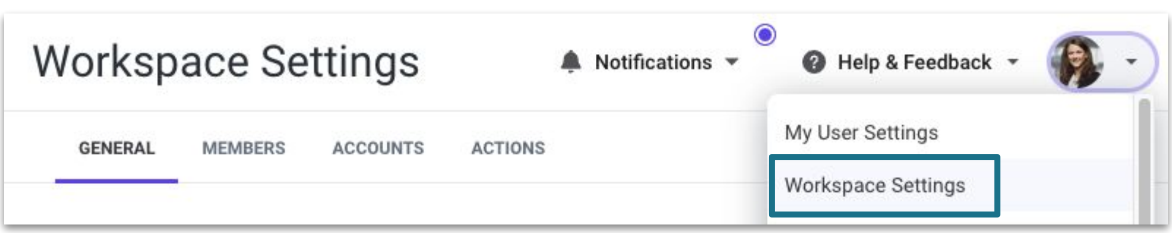
To manage social accounts:

1. Click on the profile link to view the social media account connected to Hearsay Social.
2. Click on **Edit** to manage the account or **Remove** to delete the account.



Workspace Settings

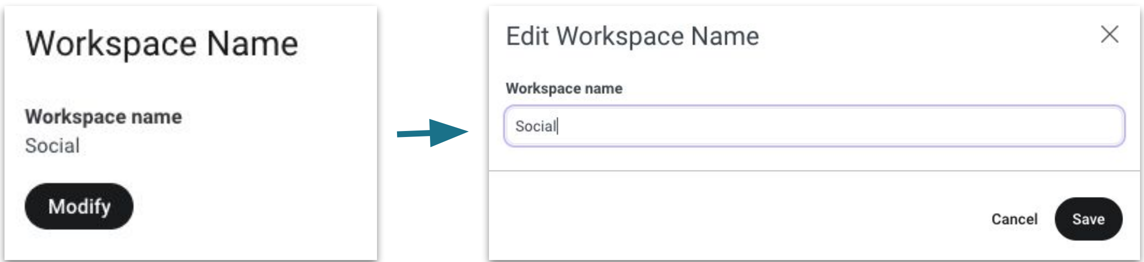
A Workspace is an instance of Hearsay. You can invite multiple users to a Workspace such as assistants or team members to help you manage your Hearsay Social account. To update your Workspace, click on the **User dropdown** in the top right corner and select **Workspace Settings**.



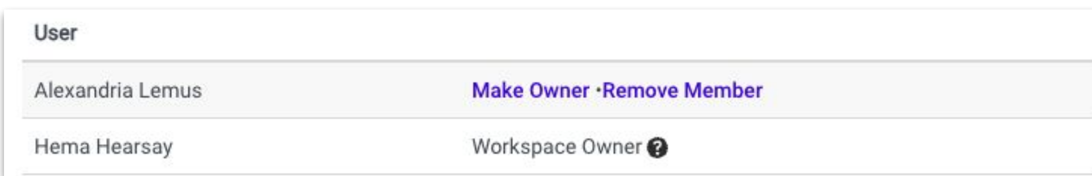
You will see the following tab options:

- General - Update the workspace name
- Members - Add and update delegate users
- Accounts - Connect, edit, and remove accounts
- Actions - Review Actions settings

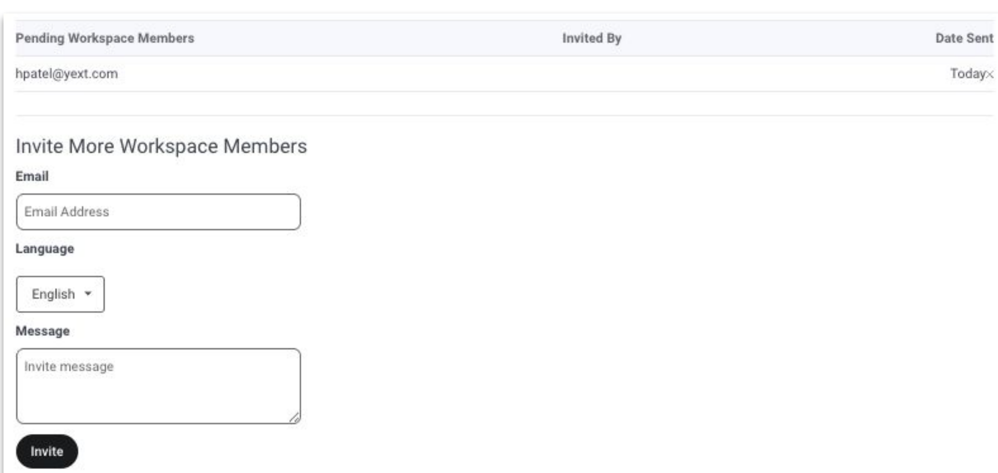
- **General**
  To change the Workspace name associated with your Hearsay Social account, click **Modify**. Type the new name and click **Save**.



- **Members**
  To change the Workspace Owner, click on **Make Owner** to the right of the user. You can only designate one Workspace owner. If you are the Workspace owner, you can click on **Remove Member** to remove a user from your Workspace.



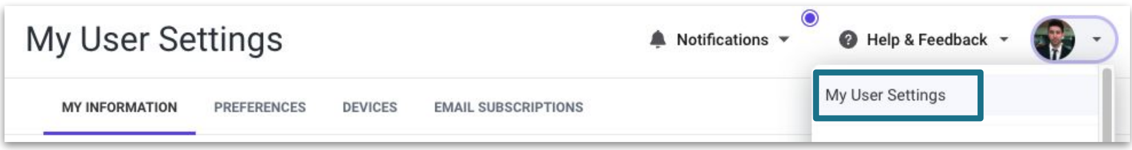
To invite staff members to your Workspace, enter the staff member's email address and click **Invite**. If you have sent an invitation to join your Workspace, you will see those members under Pending Workspace Members. To cancel or expire the invitation, click on the "**x**" next to the date the invitation was sent.



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

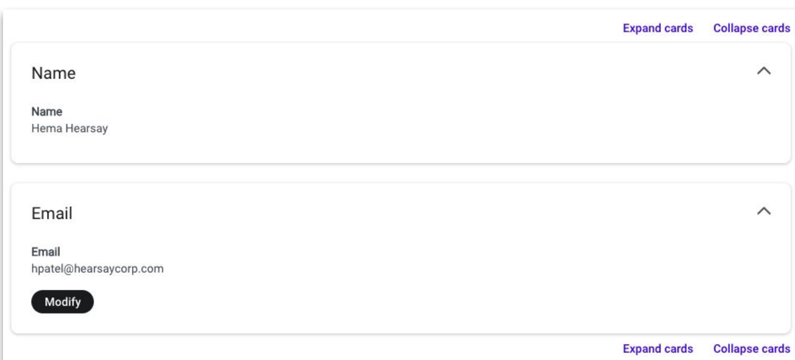
My User Settings

You can adjust your Hearsay Social account to make the application work best for you by changing your user settings. To update user settings, from your **User dropdown** in the top right corner, select **My User Settings.**

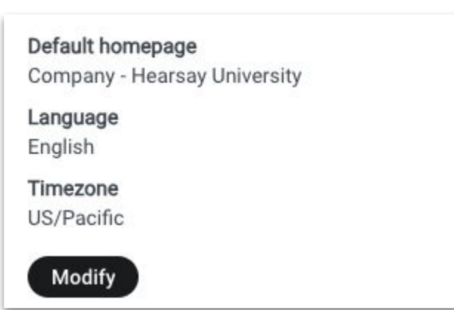


You will see the following tab options:

- **My Information**
  Update your name (if allowed) and email address. Hearsay Social 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.

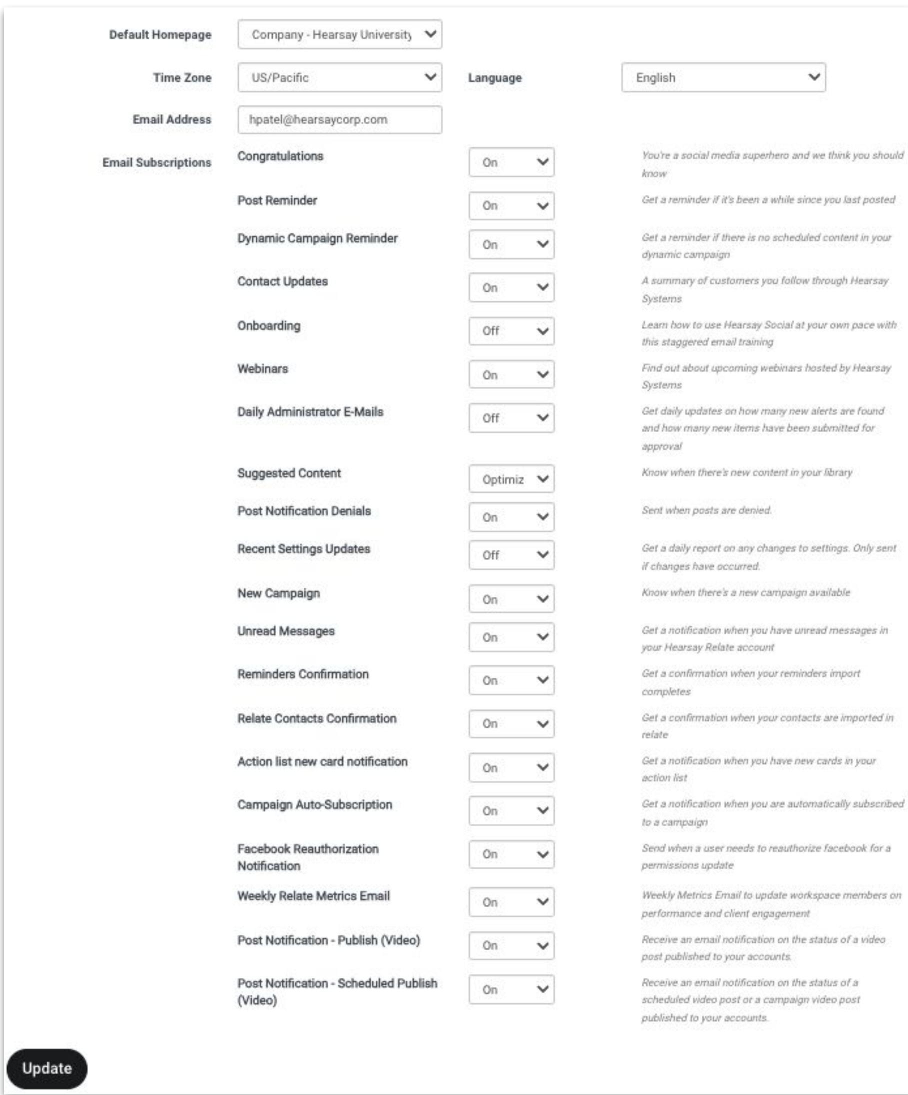


- **Preferences**
  Update your default home page, preferred language, and timezone (this is important to make sure your scheduled posts go out at the right time.



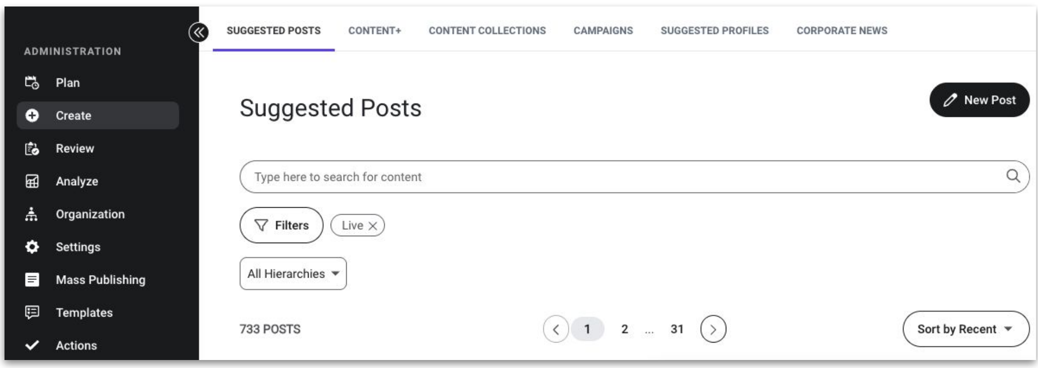
- **Devices**
  Review or disconnect your connected devices. Click **Connect New Device** and follow the prompts to connect a new device to the platform.

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

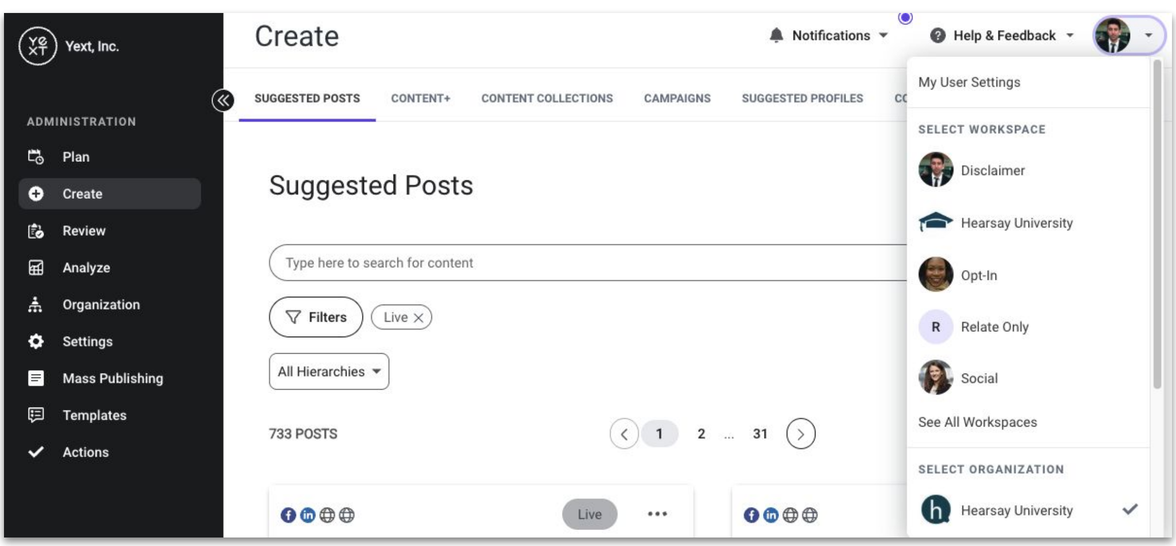


Navigating Hearsay Social

After accepting your invitation from Hearsay Systems to activate your Hearsay Social Workspace, you will have access to administrative features of the platform. The Administration tab will show you the options for **Plan, Create, Review, Analyze**, **Organization**, **Settings**, **Mass Publishing**, and **Actions**. The features available to you depend on your organization's settings.



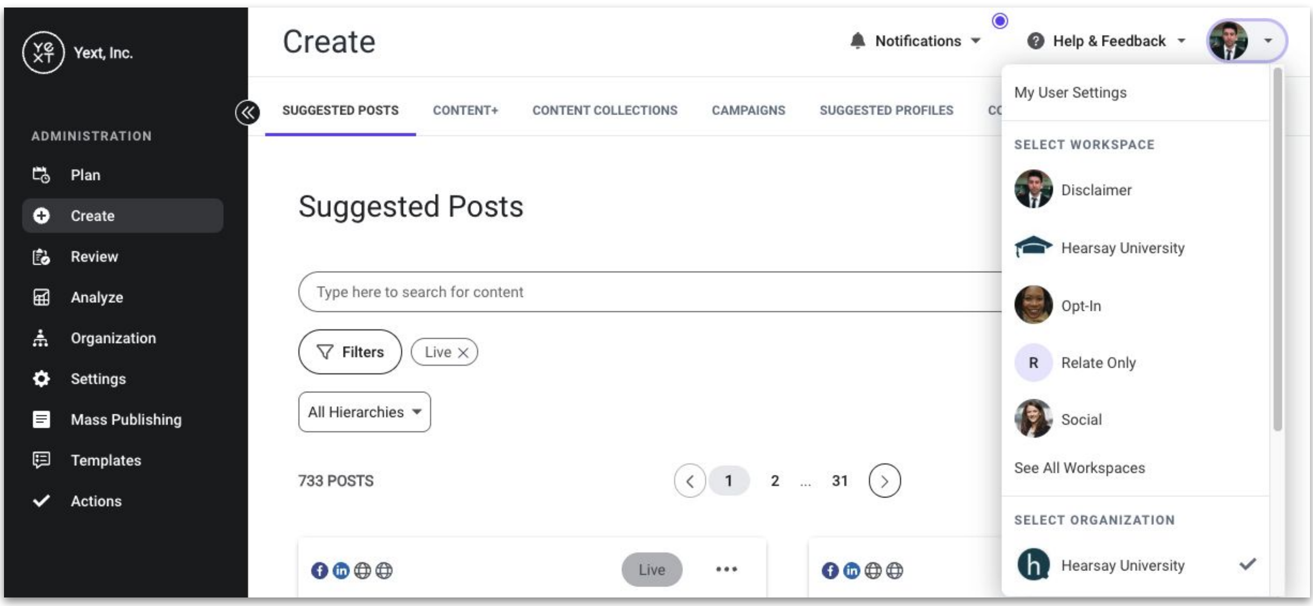
If you have additional workspaces in Hearsay or belong to multiple organizations (i.e. a sandbox organization), you can navigate to them by clicking the **User dropdown** located at the top right of your screen and selecting the workspace or organization you would like to access.



To navigate back to your Administrative view from an end-user workspace, click on **Administration** located at the bottom left of the screen.

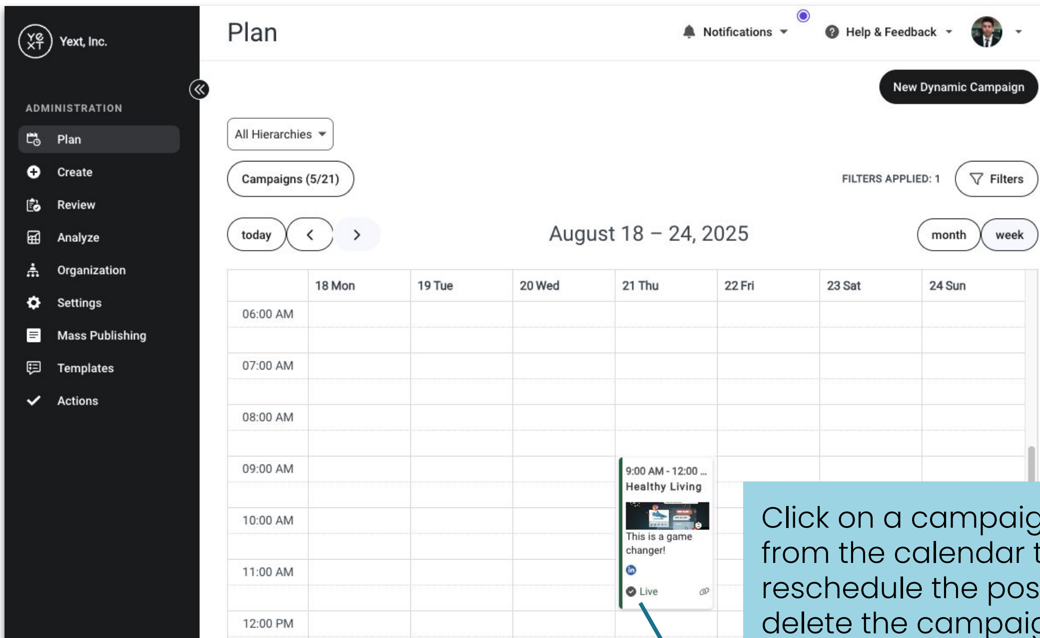
To navigate the Hearsay platform:

1. **Navigation Bar**: Select tabs from the left-side navigation bar to navigate through the product pages and features.
2. **Notifications**: Alerts users of important notifications such as profile status, content status, corporate news, and system notifications.
3. **Help & Feedback**: Directs users to the Hearsay Help Center or to leave product feedback.
4. **Workspace/Organization Toggle**: Allows users to toggle between other workspaces they are connected to within their parent organization. Also allows users to access additional organizations they belong to.

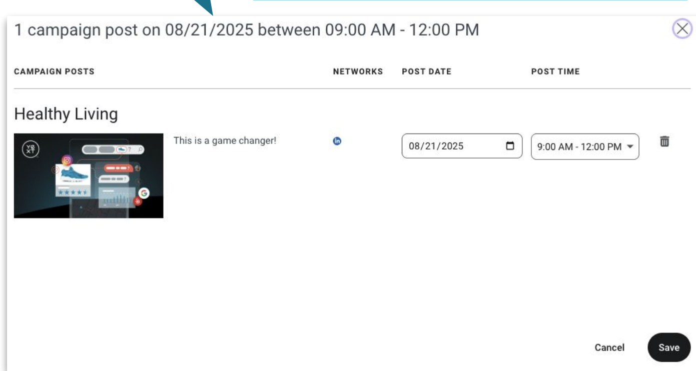


Plan

The Admin planner from the **Plan tab** allows you to see all the different campaigns and campaign posts together in a calendar view. This calendar makes it easier to visualize all your campaigns in one place and identify any scheduling conflicts or cadence issues.



Click on a campaign post from the calendar to reschedule the post or delete the campaign post by clicking the bin icon.



Calendar Views:

- Week view (default)
- Month view

Filter Options:

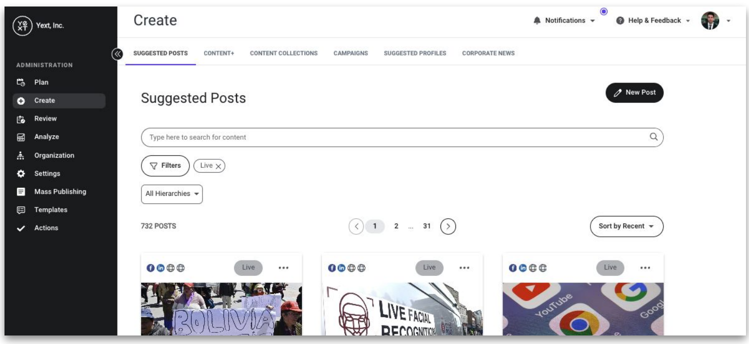
- Network
- Content type
- Modification Rule
- Status
- Tags

Create

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

Suggested Posts

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

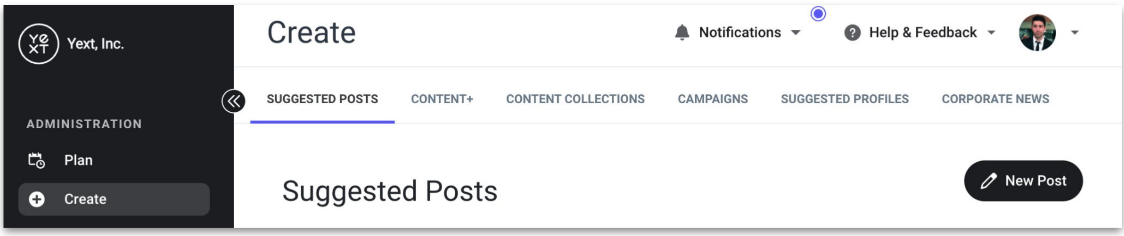


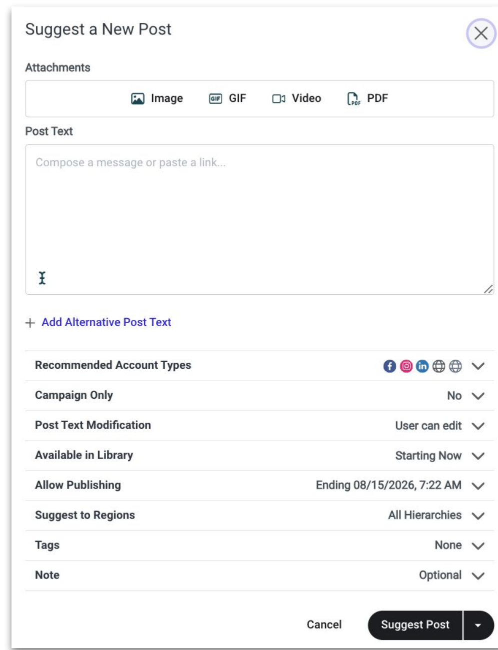
1. **Sort by dropdown:** Sort suggested posts by:
    - **Engaging**: Content that is receiving the most likes, comments, and shares on social media
    - **Popular**: Content that the majority of users within your organization is publishing
    - **Recent**: The newest content added to your library
2. **Filter button:** Filter suggested posts by:
    - **Campaign only**: View content that is tagged for campaign use only and unavailable in the end-user Suggested Post Library
    - **Channel**: Filter by content for each available channel
    - **Type**: Gif, Link, Message, Picture, Video
    - **Status**: Filter by Denied, Draft, Expired, Live, Scheduled, Unreviewed
    - **Modification**: Filter by Allows or Not Allowed
    - **Creator**: Who has created content
    - **Tags**: View content with specific tags
3. **Search box:** Type a keyword or topic in the Search box to surface related posts

Creating a New Post

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

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





2. In the **Suggest a New Post** window, review the fields:
    - **Text box**: Add a text caption or paste a link to a website in the post.
    - **Image**: Add a photo/image to your post.
    - **GIF**: Add a short image clip with no sound (Graphical Interchange Format) to the post.
    - **PDF**: Attach a PDF to the post.
    - **Video**: Include a video with the post.
    - **Add Alternate Message**: Write an unlimited number of different descriptions to go with the post. When a user publishes the post, they can choose which description to use.
    - **Recommend Account Types**: Select the networks the post can be shared to. Social networks that are unchecked cannot be selected by end users when publishing the content from the library.
    - **Post Text Modification**: Specify how a post can be modified by choosing User can edit or Not allowed - required modifications only.
        - **User can edit**: Users can edit any part of the post text.
        - **Not allowed - required modifications only**: Users cannot edit the post text except for Modification Required fields, if present. Profile variables are populated automatically.

- **Available in Library**: Select to either release the post to the library Now or Set Release to Library Date to select a date and time for the post to become available.
- **Allow Publishing**:
    - **Can Publish On**: Set a specific date for the post to be eligible for publishing by end users. If you set a future date, this content will be visible in "Pre-released" but cannot be published until the "publish on" date.
    - **Cannot Publish After**: This is the expiration date for this content. Expiration dates can be added to a post before or after it has been made available.
- **Suggest to Regions**: Specify the region(s) or hierarchy of your organization that can publish this post.
- **Tags**: Set a category that can end users can use to search for content.
- **The Pin Tag**: Allows you to select content to be highlighted in the Suggested Content email.

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

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

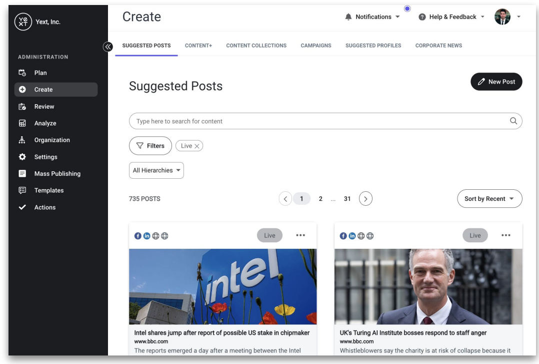
Note: Request Approval is available if your organization requires your library posts to be reviewed and approved to follow any compliance or regulatory policies.

Cloning a Post

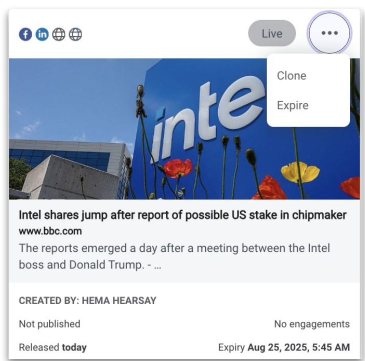
As an Admin, you can clone, or create a copy, of a piece of suggested content. Cloning retains the existing hierarchy targeting from a post and creates a new content ID for that content.

Follow the steps below to clone a post:

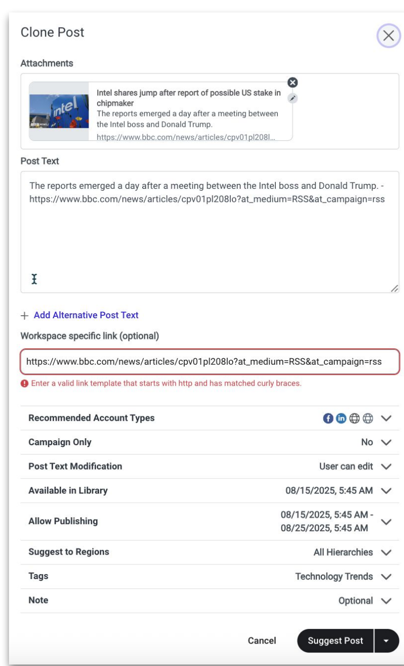
1. Navigate to **Create** > **Suggested Posts**.



2. Click on the three dots within a piece of content and click "**Clone**".



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



Content Collections

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

Adding a Content Collection

To add a new Content Collection:

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

Editing and Deleting An RSS Feed

To edit an RSS feed, select **Edit Collections** and modify the collection you would like to adjust. Make sure to click **Save** when finished.

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

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

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

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

Automated Content Approval

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

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

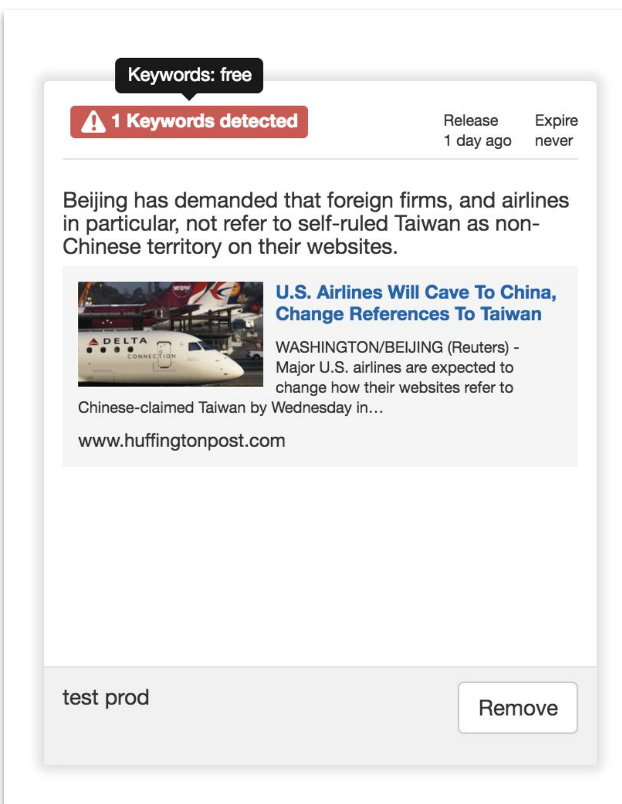
The entire post goes into lexicon review. This means the title, content of the post, and even the post's summary preview text is reviewed, ensuring all parts of the auto-suggested content are compliant.

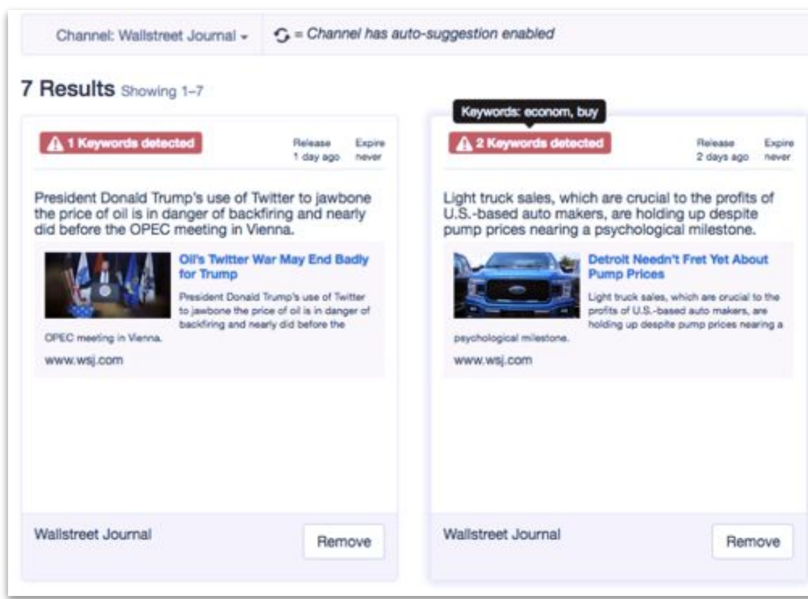
To turn this feature on:

1. Log into Hearsay as an administrator.
2. Navigate to **Create** > **Content Collections**
3. Click the **Edit Collections** button located at the top right of the screen.
4. Click the **Edit** button within any channel.
5. Scroll to the bottom of the options presented for that channel.
6. From the Auto Suggest options, select Auto Suggest With Review.

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

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



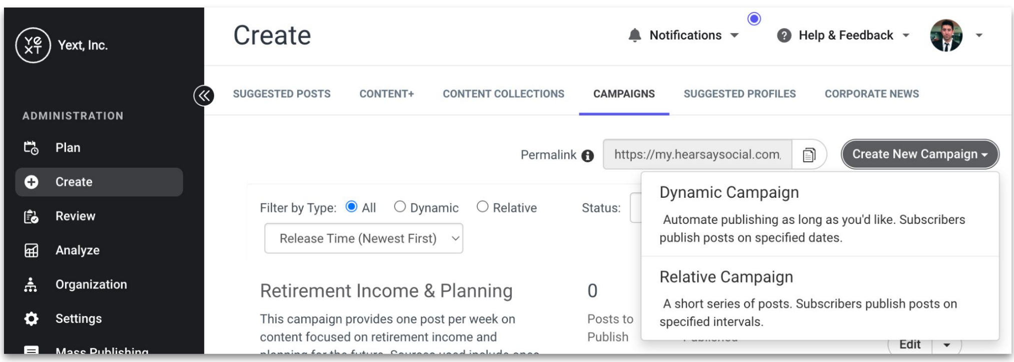


Campaigns

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

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

To create a new campaign, navigate to the **Create tab > Campaigns**. Then click the **Create New Campaign** dropdown.



There are two types of campaigns: Dynamic and Relative.

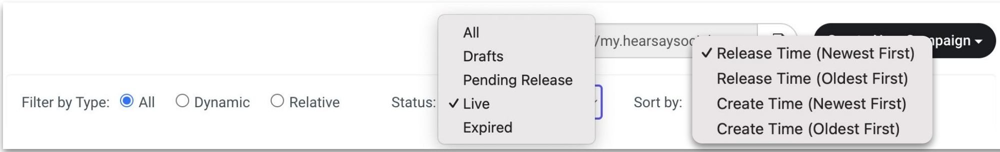
Dynamic Campaigns – Automate publishing for as long as you like

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

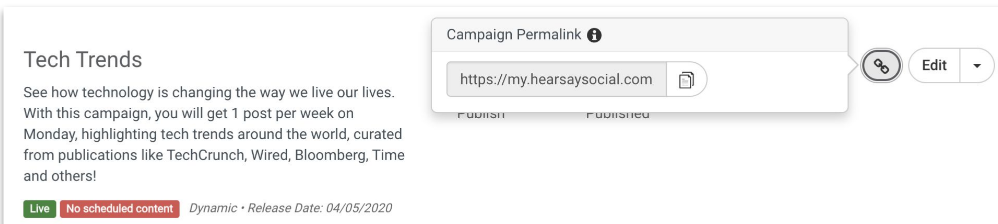
Relative Campaigns – A short series of posts

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

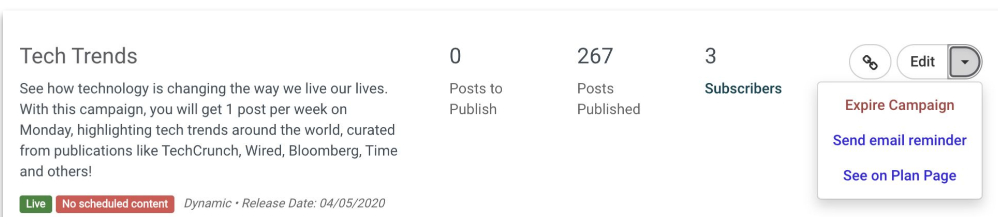
On the Campaigns page, you can sort by campaign type (All, Dynamic, Relative), status (Drafts, Pending Release, Live, Expired), Release Time, and Create Time.



You can copy the Campaign Permalink and share it to promote the campaign using multiple channels. Users will be taken directly to the campaign when they click on the link.

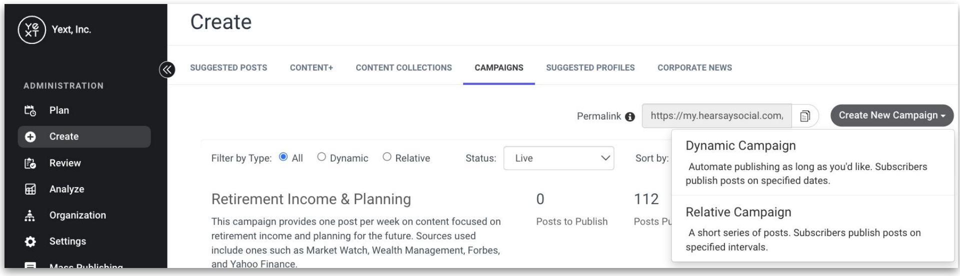


Edit all campaigns, delete pending campaigns, and expire live campaigns all from the campaign list. Once a campaign is expired, the user will not be able to see or subscribe to that campaign.

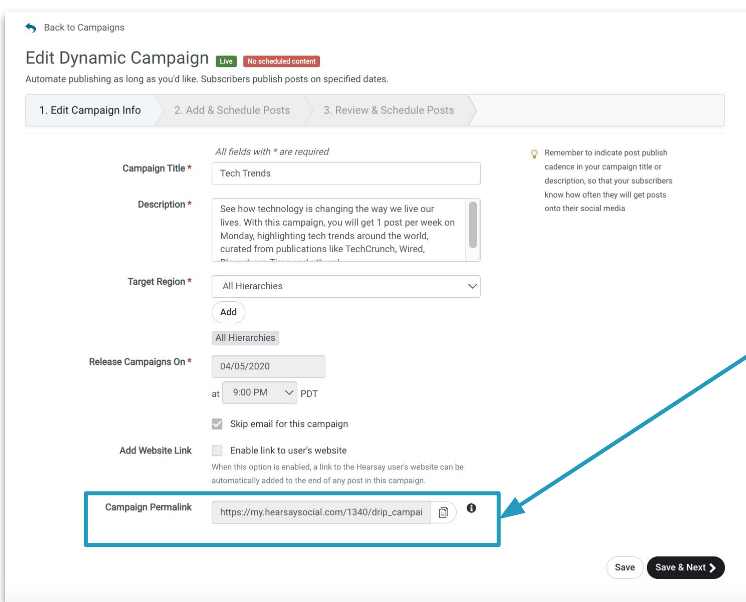


Create a Dynamic Campaign

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



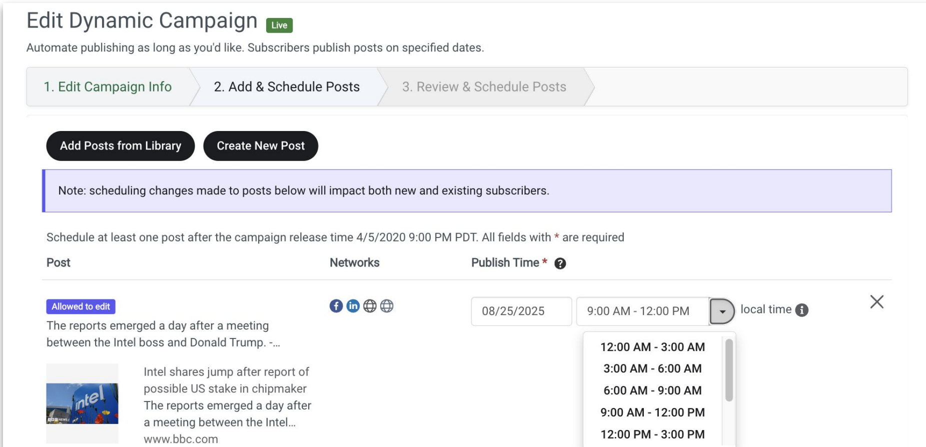
3. Fill in the campaign settings in the **Edit Campaign Info** section.
    - **Campaign Title**: This will be the title that end users see.
    - **Description**: An end user will see this information that explains what this campaign is about.
    - **Target Region**: Only the selected regions (and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



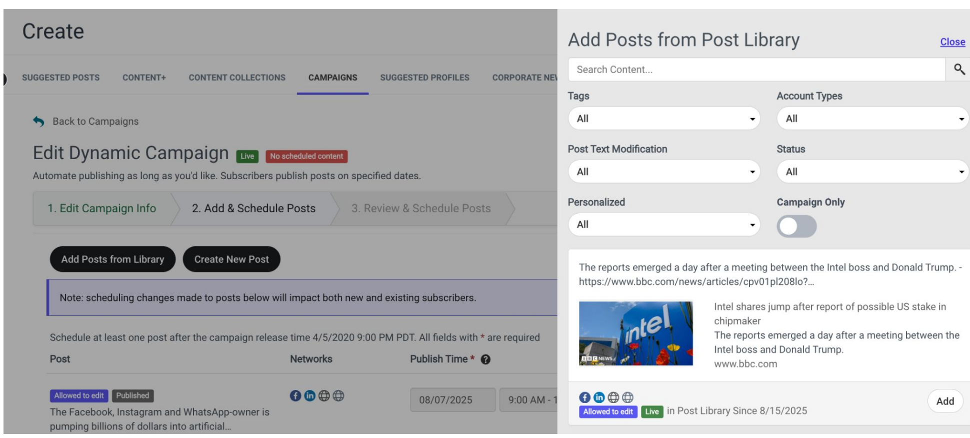
*The **Campaign Permalink** will be available once the campaign is live. Use this link to promote the campaign using multiple channels and take users directly to the campaign.

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

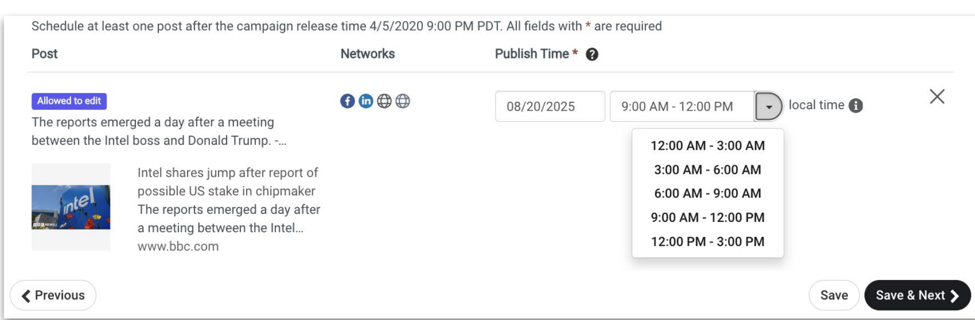
5. On the **Add & Schedule Posts** screen, choose to **Add Posts from Library** or **Create New Post**.



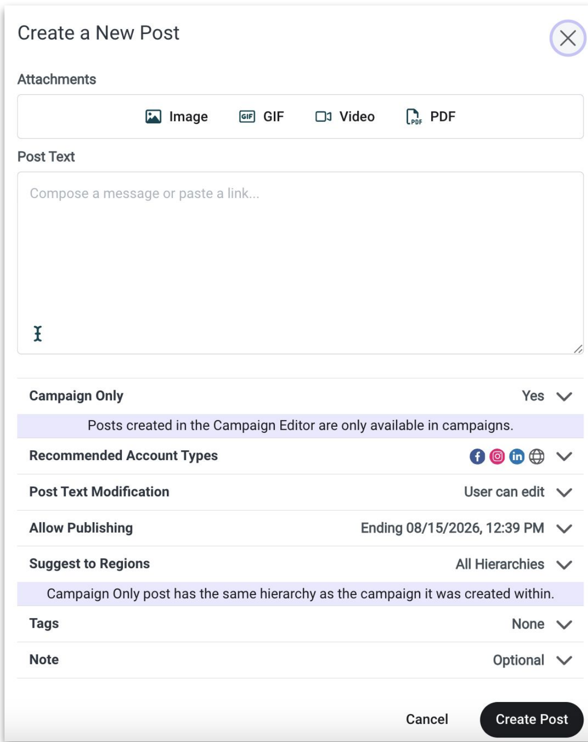
- **Add Posts from Library:**
  Select existing posts from your Suggested Post Library that you'd like to include in the campaign. Use the filter and sort criteria at the top as needed to search for library content. Then click **Add**.



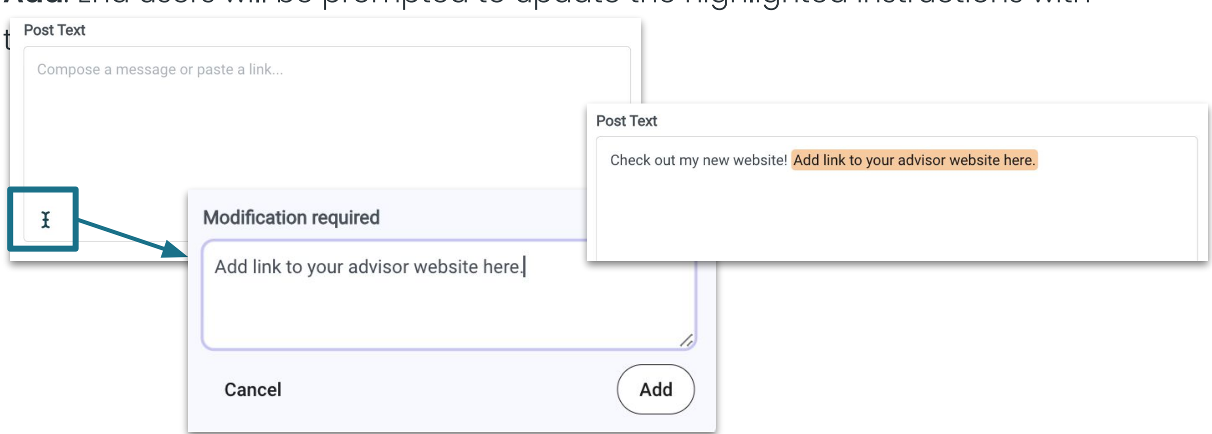
You'll then set the publish date and time and click **Save & Next > Update Campaign.**



- **Create New Post:** Create new content not yet found within your Suggested Library for use within the campaign. Similar to creating a new post from the Suggested Posts section, upload any attachments (image, GIF, video, or PDF) and add a post text. Then select the remaining settings as needed for the campaign post.



- To add **Modification Instructions** for end users within the Post Text, click the tag in the bottom left of the Post Text box and type the instructions. Then click **Add**. End users will be prompted to update the highlighted instructions with t

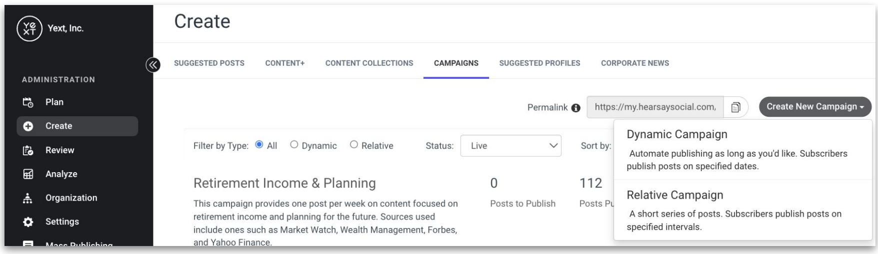


- Once complete, click **Create Post > Update Campaign.**

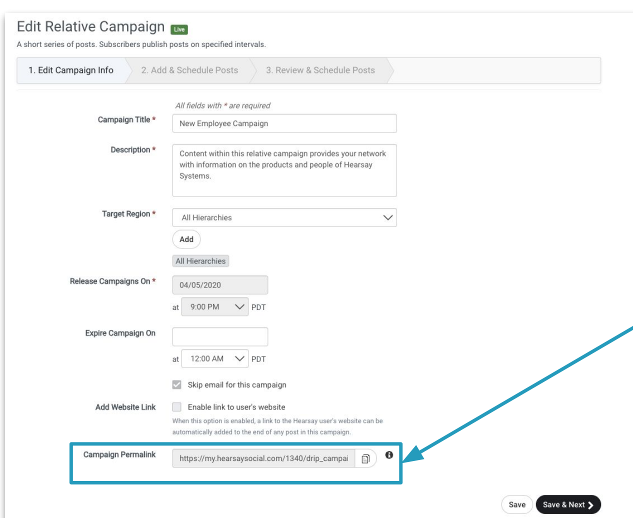
Create a Relative Campaign

Edit Campaign Info Section

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



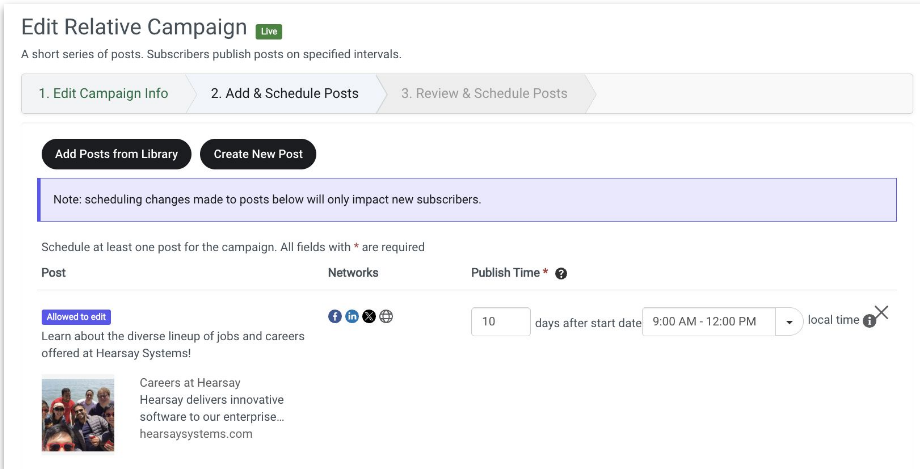
3. Fill in the campaign settings in the **Edit Campaign Info** section.
   - **Campaign Title**: This will be the title that end users see.
   - **Description**: An end user will see this information that explains what this campaign is about.
   - **Target Region**: Only the selected regions (and regions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



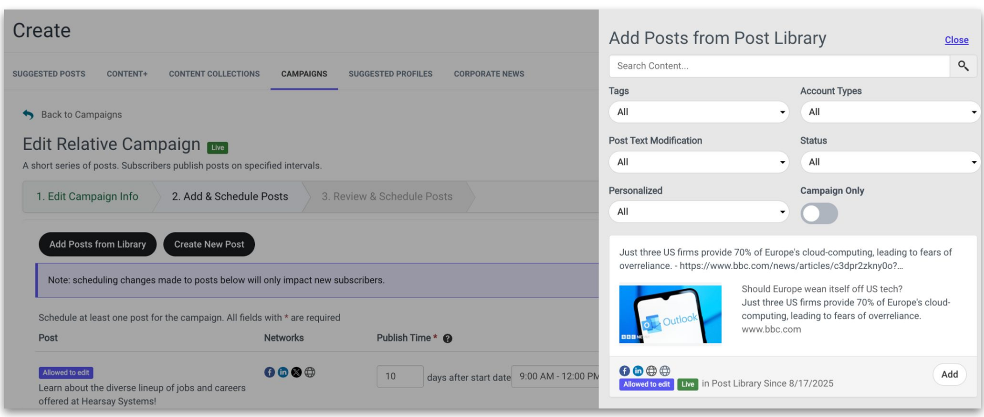
*The **Campaign Permalink** will be available once the campaign is live. Use this link to promote the campaign using multiple channels and take users directly to the campaign.

4. Click **Save & Next**.

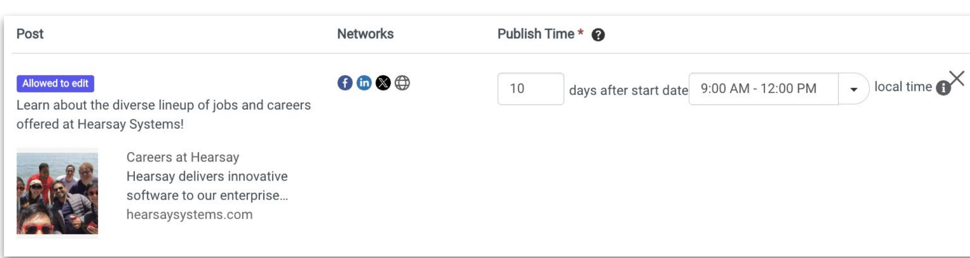
5. On the **Add & Schedule Posts** screen, choose to **Add Posts from Library** or **Create New Post**.



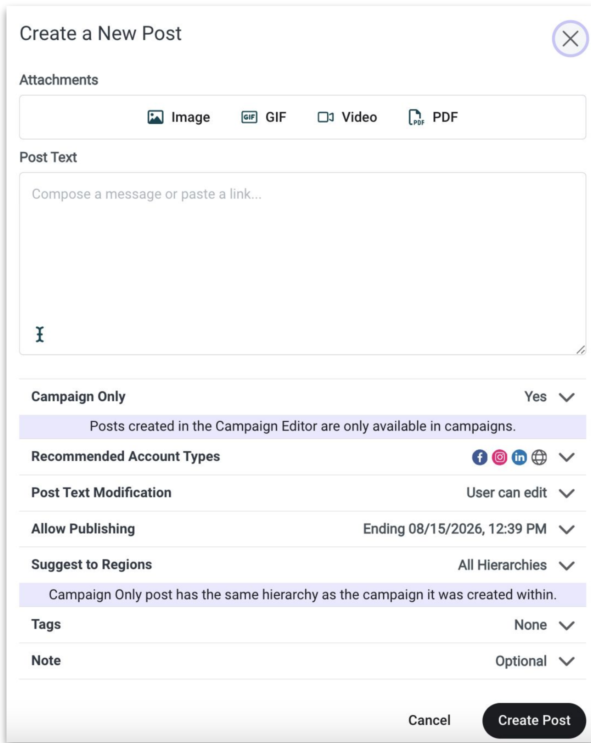
- **Add Posts from Library:**
  Select existing posts from your Suggested Post Library that you'd like to include in the campaign. Use the filter and sort criteria at the top as needed to search for library content. Then click **Add**.



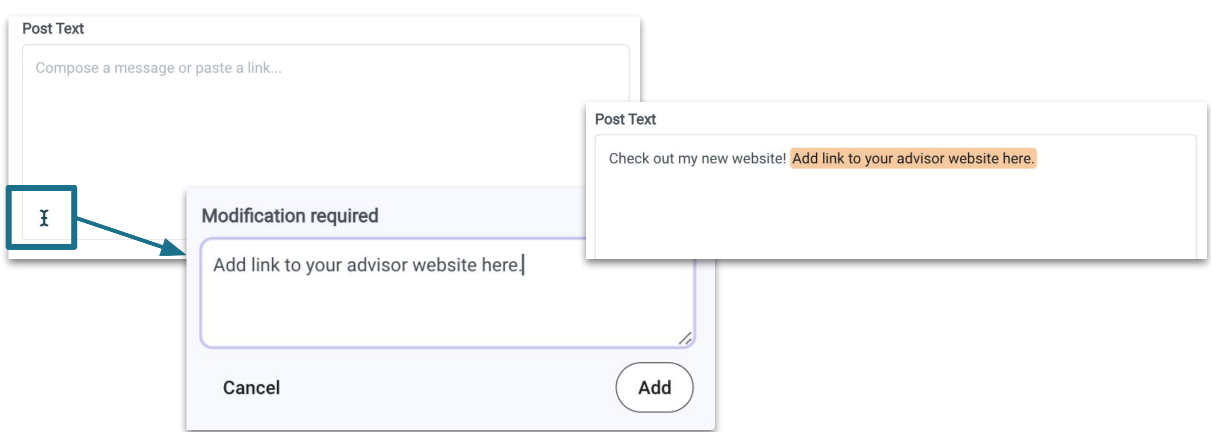
In the Publish Time section, set the number of days the post should be published relative to the campaign start date (ex: 1, 2, 3 days after) and select the time frame. Then click **Save & Next > Update Campaign.**



- **Create New Post:** Create new content not yet found within your Suggested Library for use within the campaign. Similar to creating a new post from the Suggested Posts section, upload any attachments (image, GIF, video, or PDF) and add a post text. Then select the remaining settings as needed for the campaign post.



- To add **Modification Instructions** for end users within the Post Text, click the tag in the bottom left of the Post Text box and type the instructions. Then click **Add**. End users will be prompted to update the highlighted instructions with their own content before publishing.



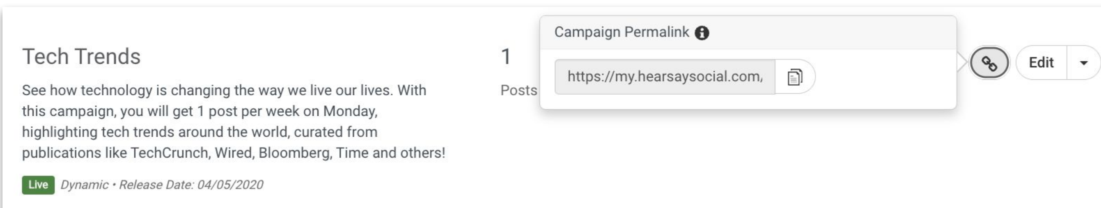
- Once complete, click **Create Post > Update Campaign.**

Sharing a Campaign with Permalinks

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

To access the permalink:

1. Navigate to **Create** > **Campaigns**.
2. Click on the **link** icon to the right of the campaign of interest.
3. Click the **copy** icon to copy the Campaign Permalink and share it with others.



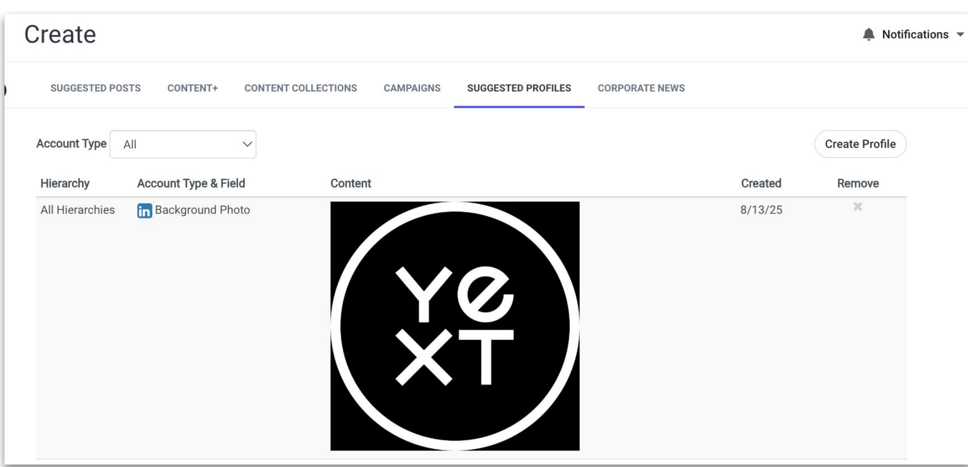
Suggested Profiles

This is the static, biographic information that resides on users' pages and outlines basic background Information (e.g., About, Job Description, Address). Admins can suggest content for specific fields within users' profiles on their social media pages.

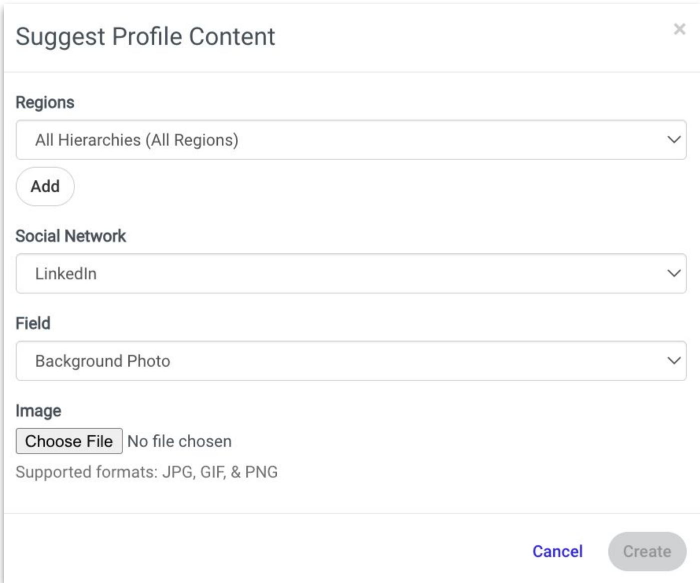
Adding Suggested Profile Content

To create Suggested Profile content:

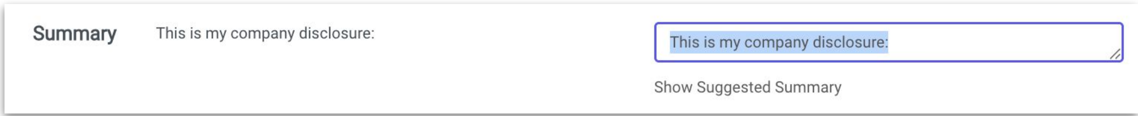
1. Navigate to **Create** > **Suggested Profiles**.
2. Select **Create Profile** in the top right corner of the Suggested Profiles page.



3. Choose the regions that will have access to this profile content.
4. Choose a Social Network from the list and a field bar will appear. All fields available for that specific network will appear as an option, and know that fields will vary based on the network you've selected.
5. Choose a field and type in the information you wish your end-users to include on their profile.
6. Select **Create** to finish this process.



Now, when your end users attempt to update their profile or page information in Hearsay, they'll have a 'Show Suggested' option under the listed field. Clicking it will populate all suggestions you or other marketing admins created, allowing end users to simply select one and submit their profile for final approval.



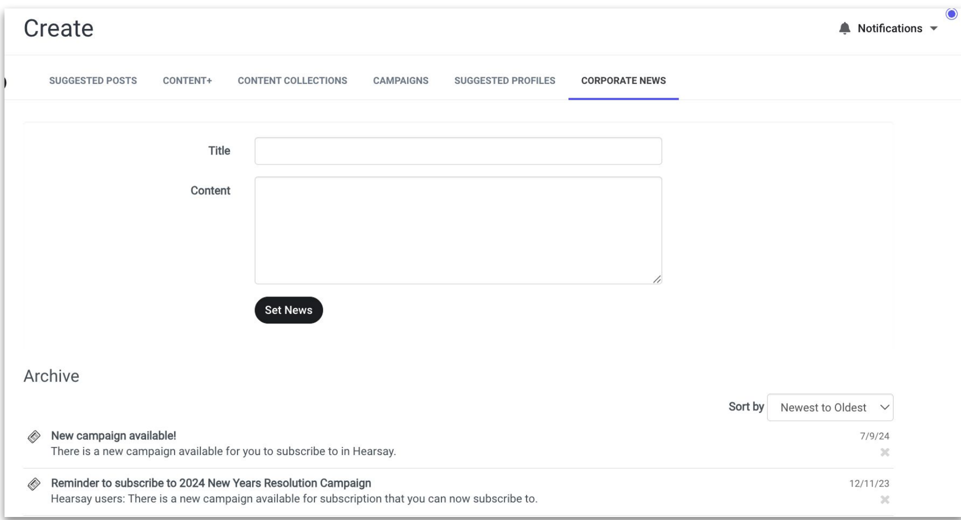
Corporate News

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

Creating Corporate News

To create Corporate News:

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



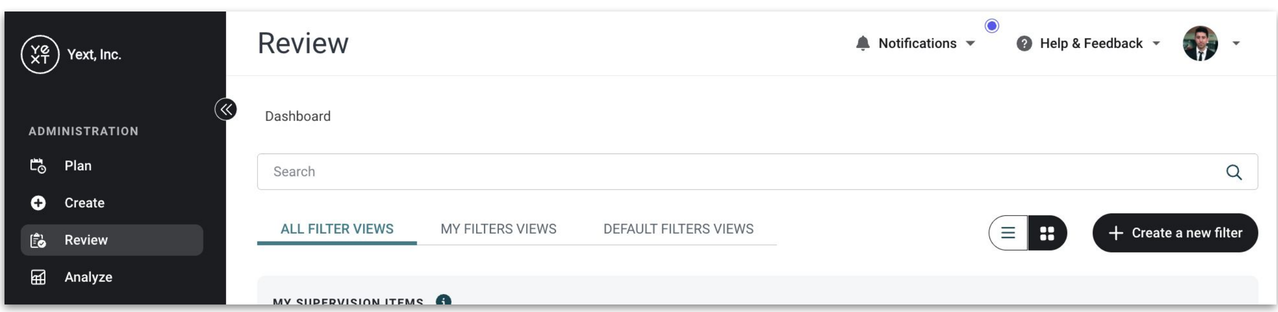
Note: Corporate News cannot be mass deleted once set. Contact your Customer Success Manager (CSM) if you have an issue.

Review

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

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

Within the Admin platform, select **Review** from the side navigation bar to locate your organization's compliance workflow.

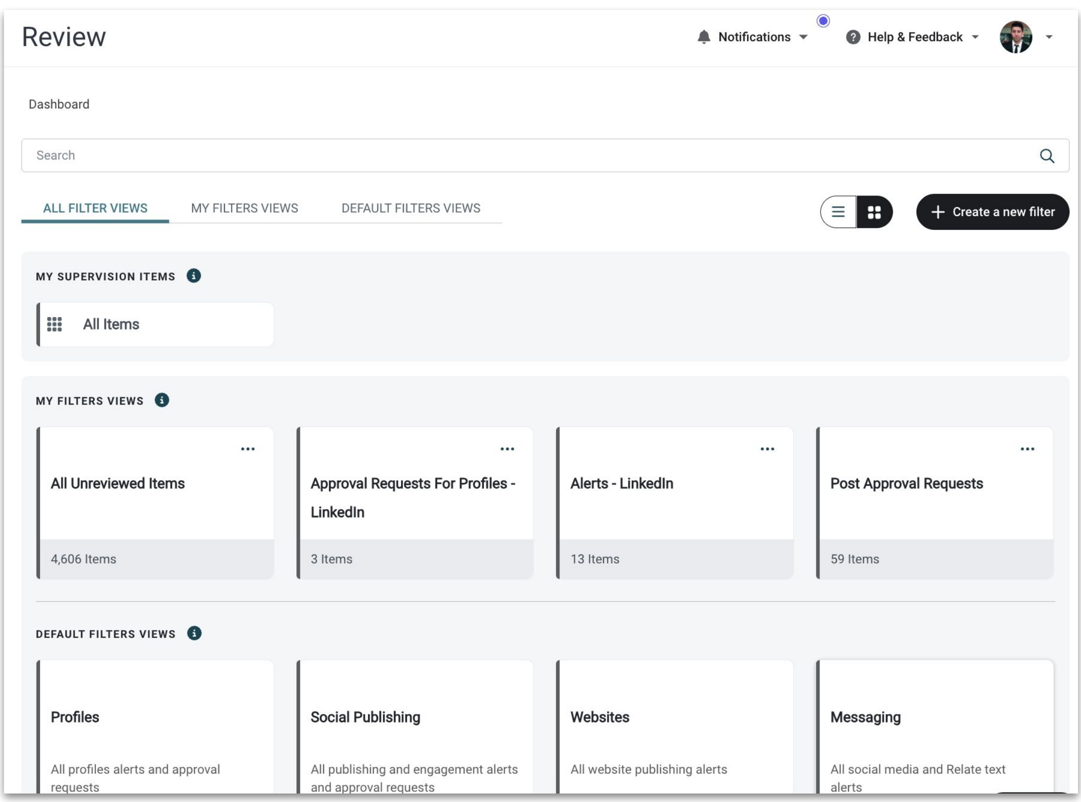


Dashboard

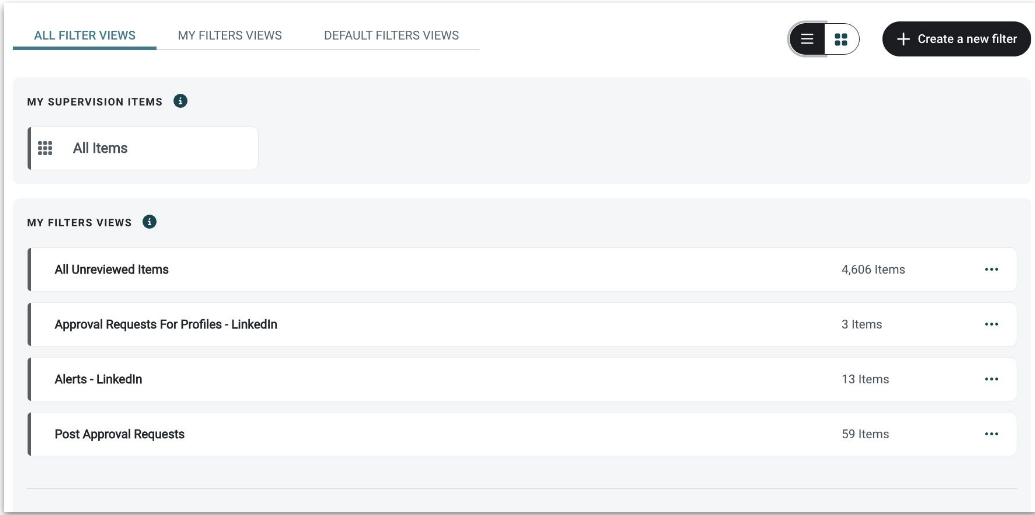
This area allows you to quickly access prior saved filters made within Supervision. You can review all supervision items, your saved filters, and default filters. You can add and save new searches here as well as rename or delete prior ones.

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

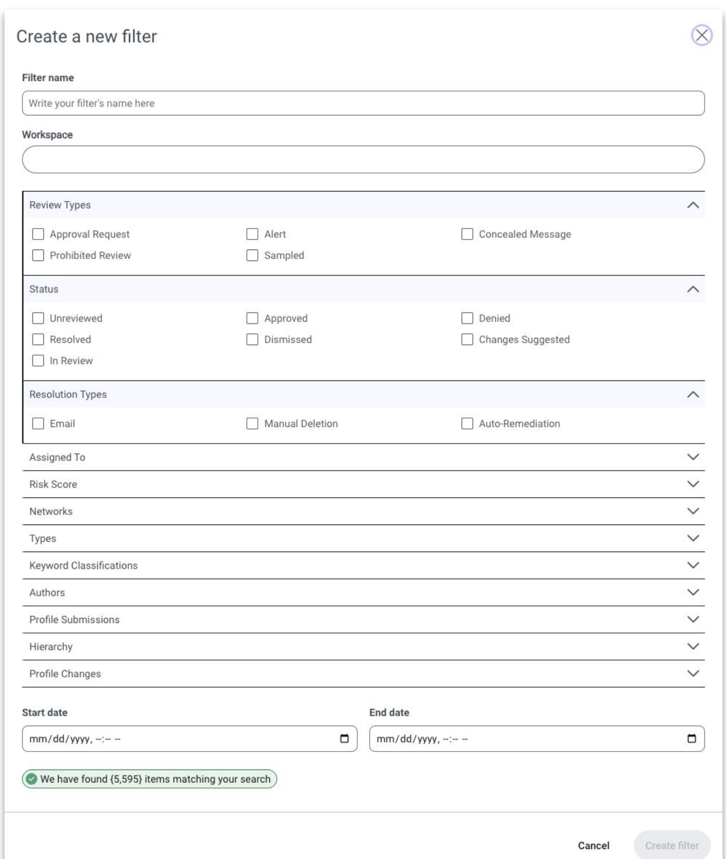
- Unreviewed Approval Requests for Profiles
- Unreviewed Approval Requests for Posts
- Unreviewed Alerts for Profiles
- Unreviewed Alerts for Posts, Comments, Likes, Private Messages
- Unreviewed Review Items for a Specific Queue



1. Use the toggles in the top right to change the dashboard view from Tile to List view according to your preferences. The toggle will stay on the one you've selected if you navigate away from the page.



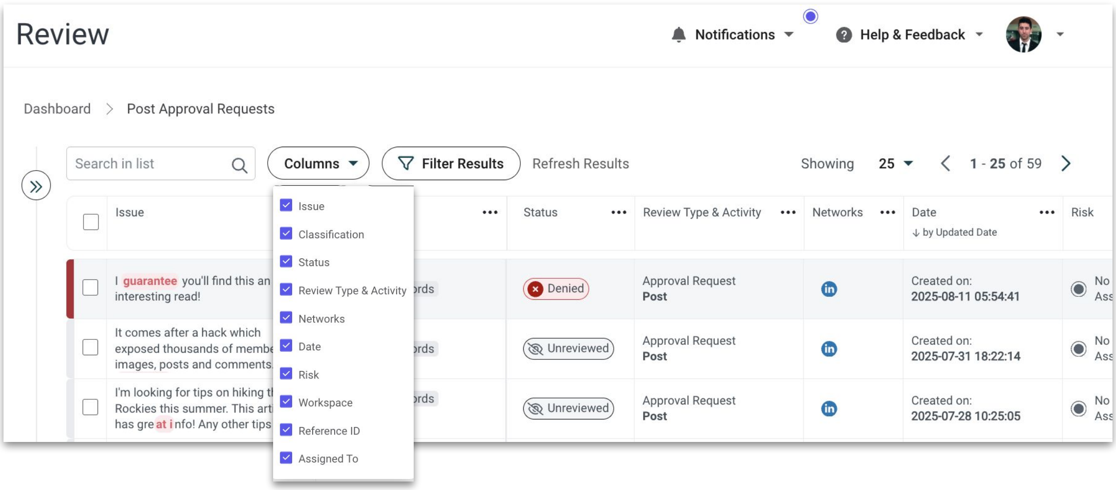
2. Click the **Create a New Filter** button to create a new filter view on the dashboard. Be sure to provide a filter name and make your desired selections for the filter. Then click **Create filter**.



Filter Options

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

3. When you click into a dashboard filter, a queue of workflow items is displayed based on the filter criteria set up. Use the Search box as needed to search for items by keyword.
    - **Columns:** deselect columns that you do not want to appear in the Results table.
    - **Filter Results:** update filter settings as needed.



Supervision Results Table

Issue	Displays the post copy/text.
Classification	Engagement activity which triggers via your organization's lexicon term list.
Status: Unreviewed	Action by an admin has not yet taken place on the user's activity.
Status: Approved	Only applicable for approval requests. The admin has deemed the user's activity within their compliance policy.
Status: Denied	Only applicable for approval requests. The admin has flagged the user's activity, as it falls outside of their compliance policy.
Status: Resolved	Only applicable for alerts. The admin has contacted the user via email, notifying them that their activity was approved, or the admin has chosen to delete the activity in question.
Status: Dismissed	Only applicable for alerts. The admin has deemed the activity as within compliance, and has chosen not to contact the user.
Status: Changes Suggested	Only applicable to profile approval requests. The admin has deemed the user's profile request to be outside of their compliance policy, and has adjusted the user's requested information to fall within the compliance policy. The user is then given the opportunity to accept these changes, which will then go live on their social account, or the user can resubmit a second request.
Review Type & Activity: Approval Request	The user has taken action within Hearsay to either publish a post with original content, respond to an engagement, or update their profile/business page information. The action will not complete until a compliance member approves of it.
Review Type & Activity: Alert	The user has taken action outside of Hearsay, natively on their social account. This action has already taken place, and Hearsay has detected it. With alerts, a colored arrow will be displayed (green, orange or red), which represents Hearsay's prediction of the severity of the alert, from low risk to high risk. The more an admin approves, resolves, or dismisses an alert, the more Hearsay's supervision tool can better detect important alerts.
Review Type & Activity: Prohibited Review	Testimonials that are prohibited based on your organization's settings. This feature is off by default and must be enabled and configured by the admin. To configure settings go to Settings > Organization Settings > Review & Archive. *See Page 55 for more information on testimonial settings.*
Review Type & Activity: Sampled	Activities that are sampled did not trigger an alert due to no infraction detected.
Networks	The social network where the activity took place or is meant for.
Date	The date and time at which the activity was created/detected

Supervision Results Table (continued)

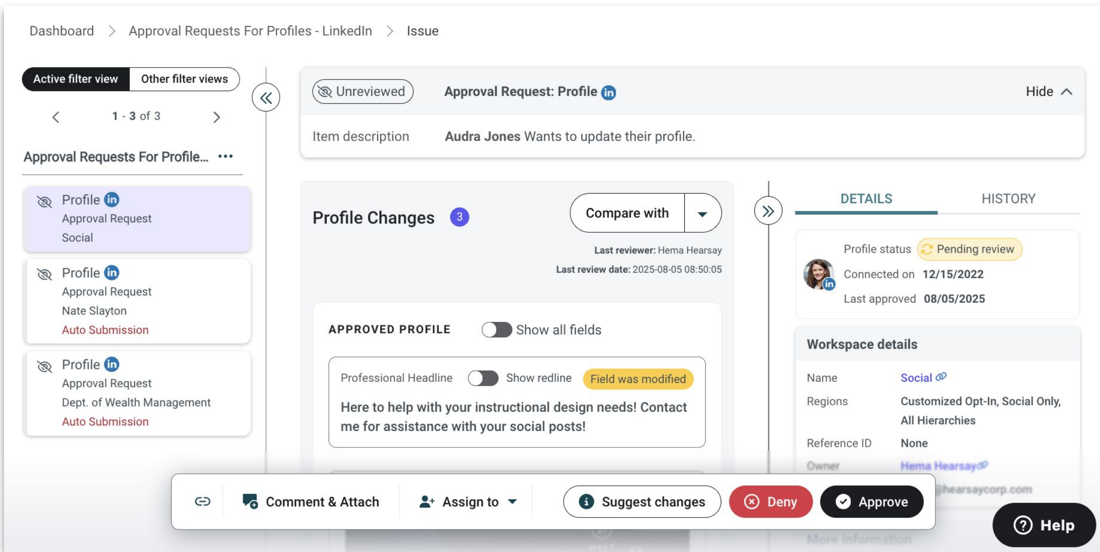
Workspace	The workspace the activity is taking place on.
Reference ID	The reference ID of the activity. This is very helpful when contacting Hearsay Support for assistance.
Assigned To	The name of the admin who was assigned the particular activity for review.

Reviewing Supervision Items

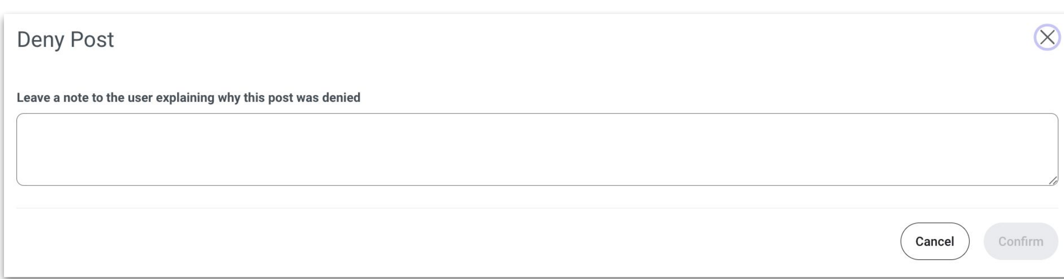
Clicking a supervision item allows you to quickly review the activity in question.

To manage a Profile Approval Request:

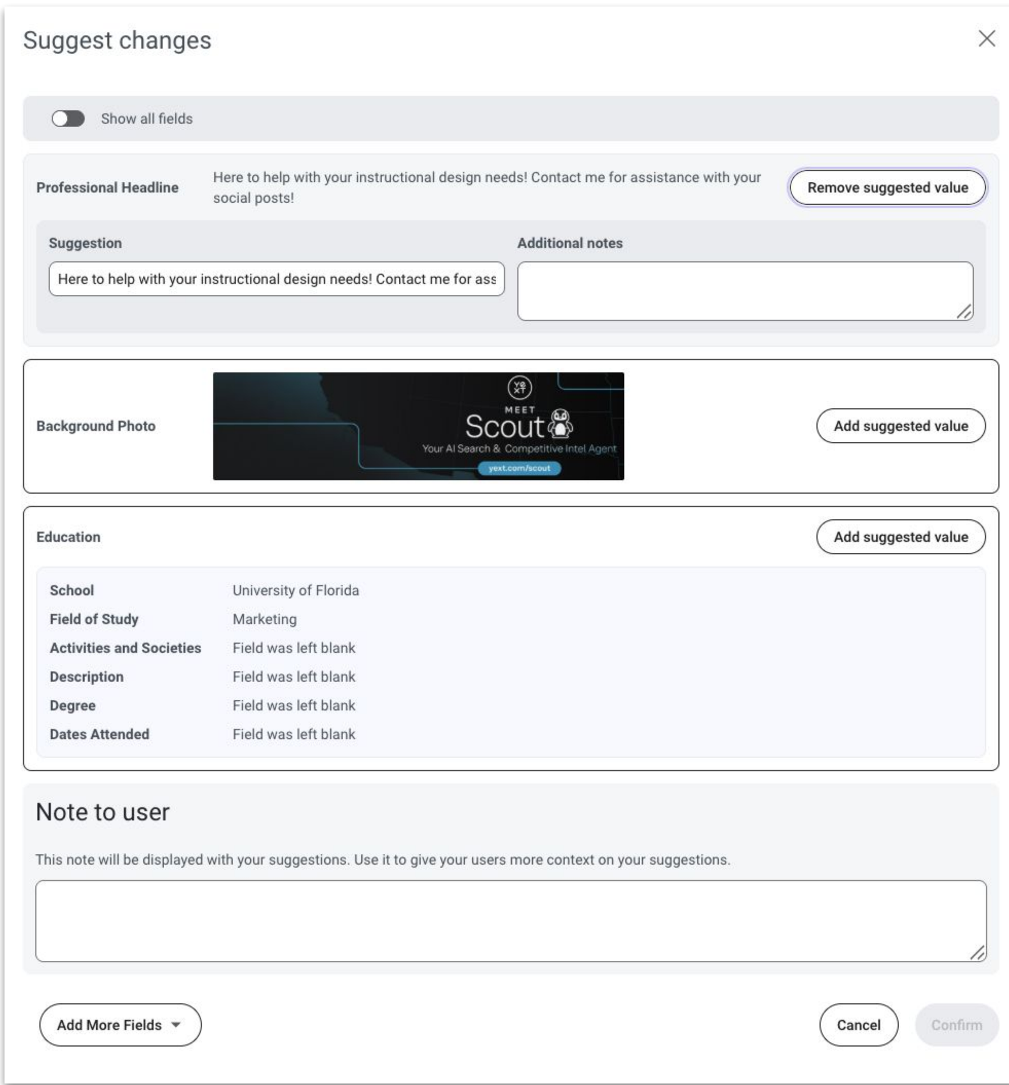
1. Click an **Approval Request** from your search results to view it in greater detail.
2. Under **Profile**, sections that the end user has requested changes for will be displayed. To view and compare the request against the information currently public on the end users profile, click the field. The highlighted text represents text the end user added in that section, and greyed out text, marked with a strikethrough, represents text the end user removed.



3. The **Action** buttons for Profile Approval Requests are listed at the bottom of the screen. If the requested changes for the profile align with compliance policy, click **Approve**. The end user's profile will then update with their new information.
4. If the profile request does not align with compliance policy and therefore must be denied, scroll down and click **Deny** and your end user will receive a notification in their inbox, providing the next steps on how to resubmit their profile for review.



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

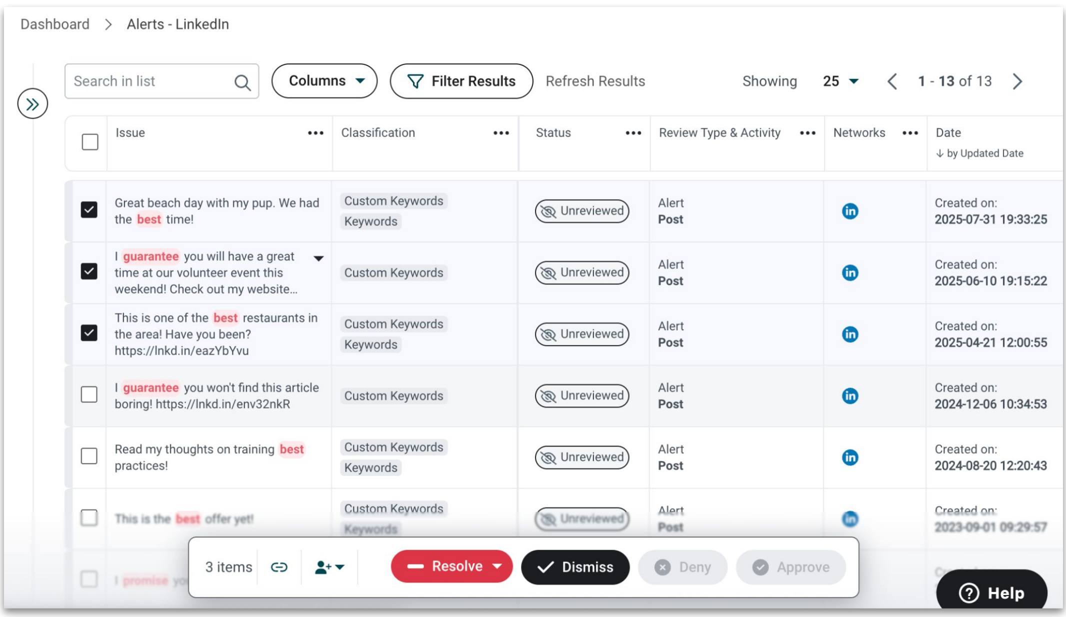


Bulk Action of Supervision Items

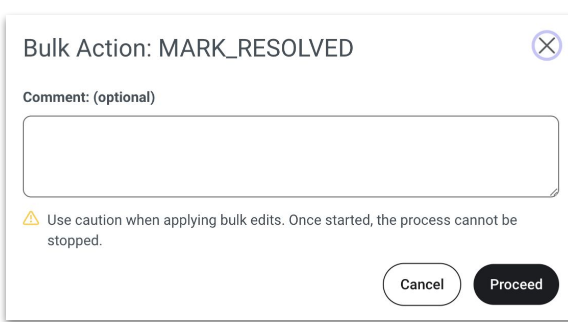
Admins can save time and effort by taking bulk actions on Supervision items.

To take a bulk action on Supervision items, they must be the same type of action (i.e. LinkedIn alerts, Facebook Post Alerts).

1. Checkmark box next to items individually or checkmark the box at the top to select all of the items displayed on the page. You can act on up to 25 items at once based on the pagination in the Supervision view.



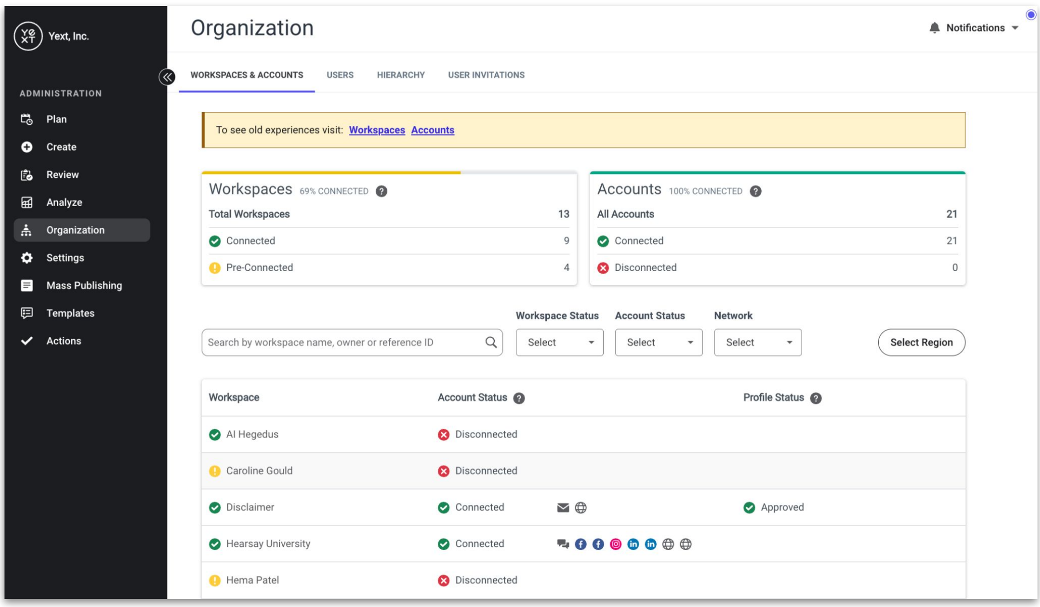
2. You can include a comment that will be added to each individual workflow item. These will appear across individual workflow items to simplify management and remediation. Bulk comments allow you to provide context and more easily track any bulk actions. Click **Proceed** to complete the action.



Accounts Overview

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

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

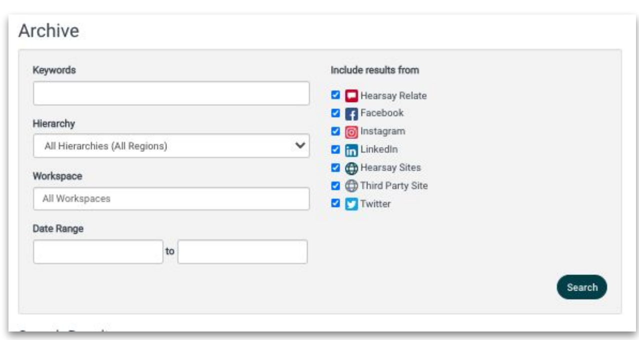


Archive

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

You can filter your Archive by the following:

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



Alerts

An alert occurs when a user creates or updates mentions, posts, comments, or profiles on a native site that is connected to the Hearsay account. An alert is a **post-activity** event because it occurs after the user has created or updated content on the native site.

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

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

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

Approval Requests

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

For Pending Posts with Flagged Lexicon in Place

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

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

For Pending Posts Where all Posts Require Approval

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

Rules for Scheduled Posts

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

For Suggested Posts

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

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

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

For Pending Activities

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

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

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

For Profiles Edited through Hearsay or on the Native Site

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

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

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

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

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

For Profile Auto-submissions when Connecting to Hearsay

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

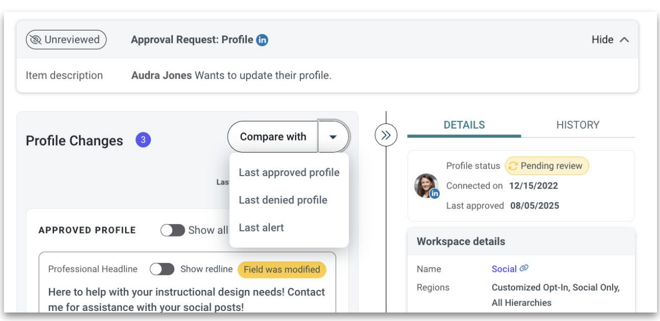
- Approves the profile if it is compliant, in which case no further action is required.
- Denies the profile, in which case the user must do one of the following:
  - Update the profile through Hearsay and resubmit it. During the grace period, the admin will be notified, and will re-review the profile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

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

Labels to Indicate Approval Status of Profiles in Supervision items

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

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



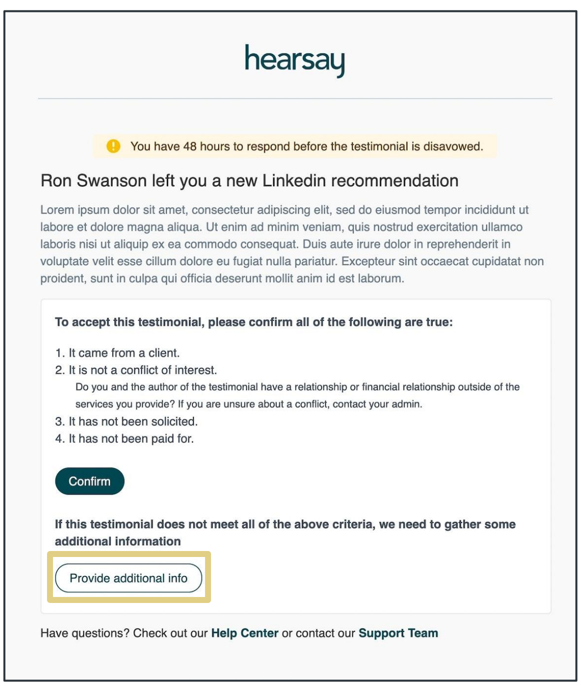
Prohibited Review

When someone leaves a testimonial, the advisor/agent receives an email asking them to identify the individual who wrote it, and gives the timeframe for them to take action.

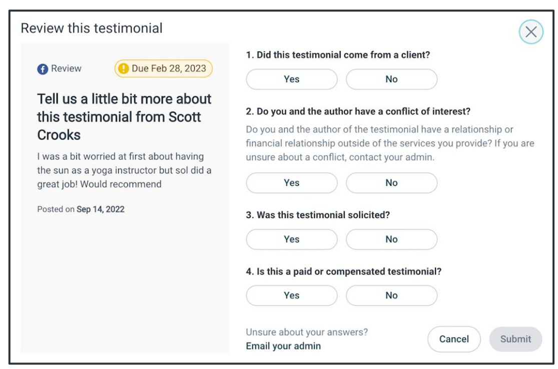
- **Facebook**
  Under Facebook's New Page Experience, advisors/agents must either respond to all reviews or completely ignore all reviews in order stay compliant with the SEC rule. Hearsay's solution is to automatically reply to every review, with language provided by a setting controlled by admins, that either accepts or disavows the review. Reviews can be turned off completely from the advisor/agent's native Facebook page.
- **LinkedIn**
  LinkedIn Recommendations can be hidden after they are accepted, which allows Compliance to hide recommendations that violate their individual policies.

Advisor/Agent Workflow for Testimonials:

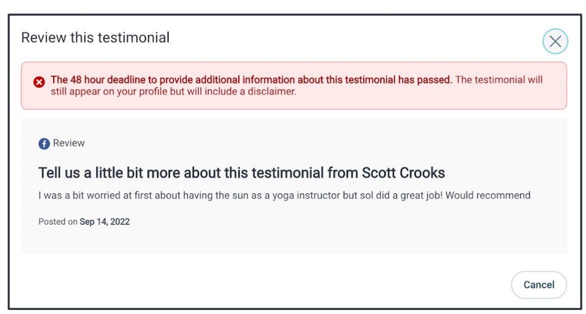
When someone leaves a testimonial, the advisor/agent receives an email asking them to identify the individual who wrote it, and gives the timeframe for them to take action.



If they select **Provide additional info**, they are taken to this screen to provide the information.

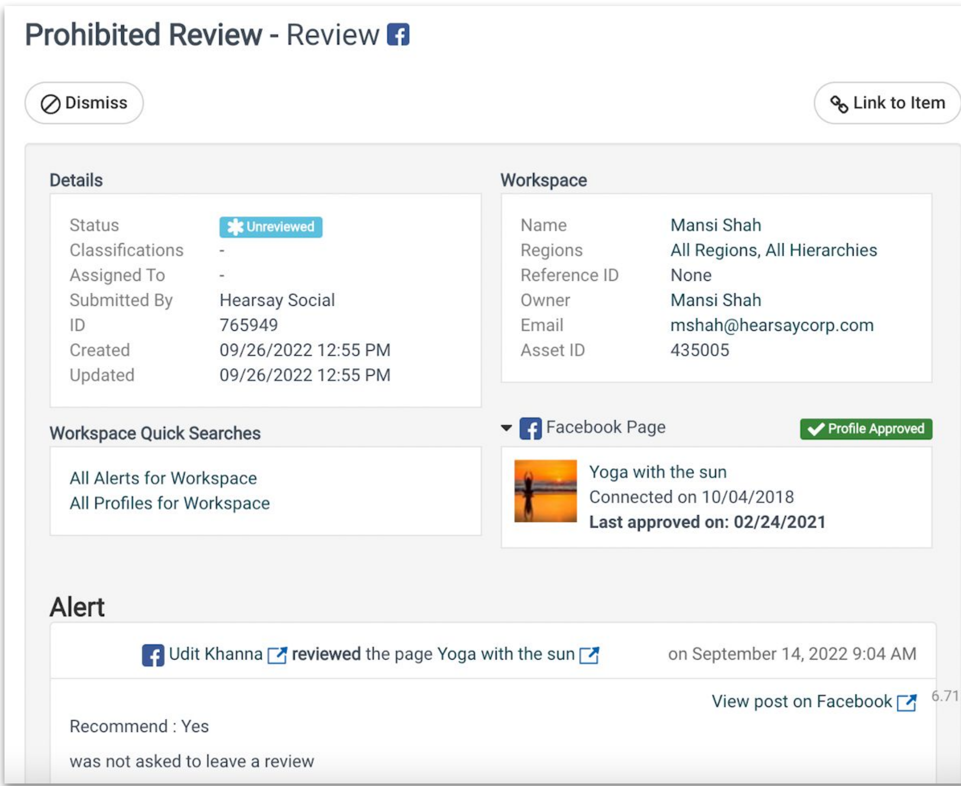


If the advisor/agent doesn't provide the information on time, they are informed that the testimonial is disavowed.



Testimonials that are passed through to Supervision are put into Review status.
Supervision options:

- **Accept**: Keep the testimonial (LinkedIn) or leave a comment with acceptance language (Facebook).
- **Reject**: Remove the testimonial (LinkedIn) or leave a comment with disavowed language (Facebook).
- **Reject & Block**: Leave a comment with disavowed language and block the user from posting on that page (Facebook only).

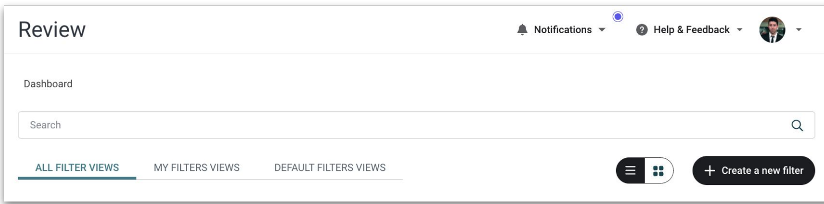


Filtering Workflow Items

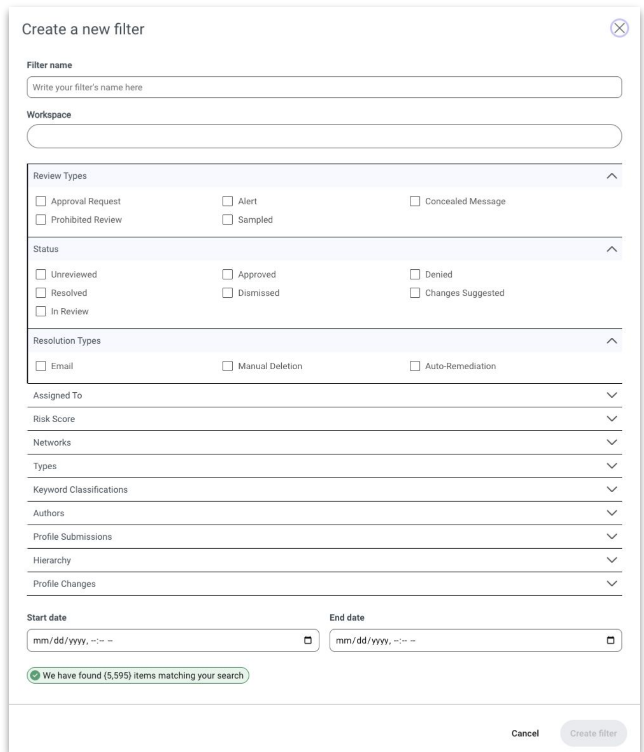
Filtering allows administrators to create custom searches for reviewable workflow items in the Supervision Dashboard.

To configure filtering:

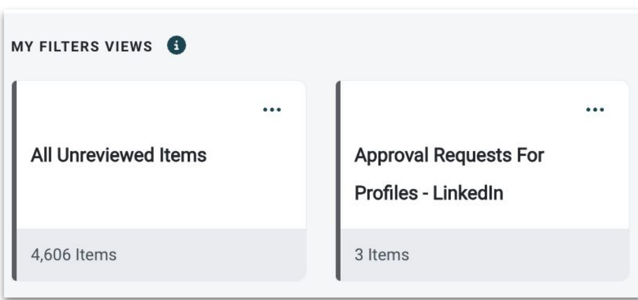
1. Click **Review** > **Create a New Filter** to display filter options.



2. Select the desired items to filter by (descriptions are documented on page 36) and click **Create Filter**.



3. Your filtered results will be displayed as a new dashboard tile in **My Filters Views**. *Pro tip: Applying descriptive names when saving a filter makes it easy to identify the filter's use case.*



Profile Auto-Remediation

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

As an example:

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

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

If remediation is successful:

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

If unsuccessful:

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

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

If an alert is generated:

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

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

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

Profile Auto-Remediation FAQ

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

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

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

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

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

PDF Capture of 3rd Party Links

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

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

To enable PDF capture, contact your Customer Success Manager.

Whitelist Publishing Sources

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

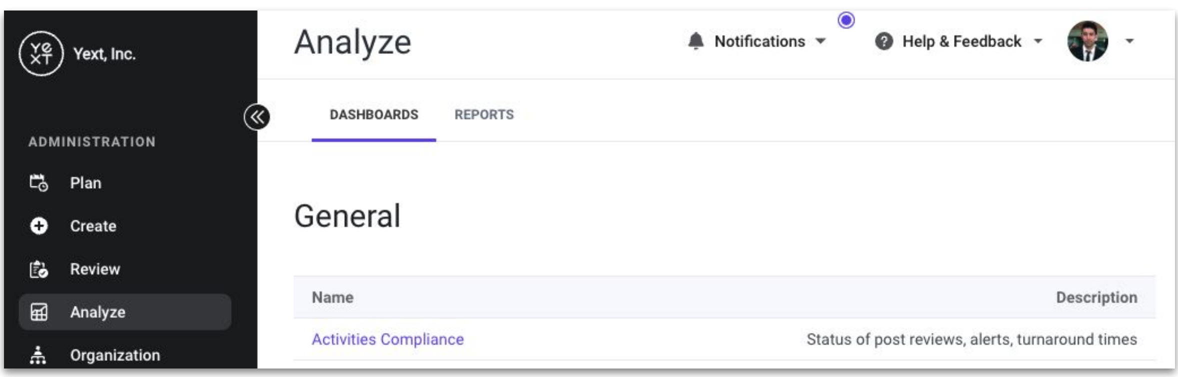
Hearsay can configure a 3rd-party publishing source to be whitelisted as a trusted source of content. Any content that is published directly to social accounts from that source will be archived by Hearsay but not scanned for lexicon terms. 3rd-party publishing sources can be set based on hierarchy.

Analyze

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

Getting Started

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



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

To generate and download a report:

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

Organization

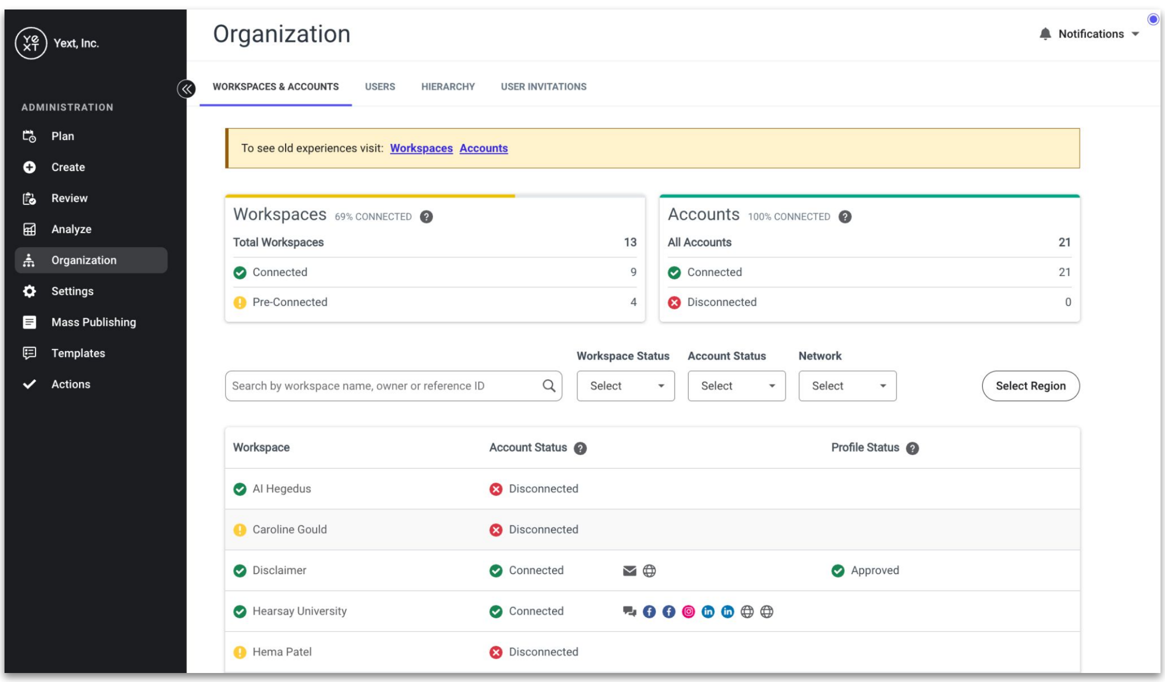
The **Organization tab** provides the following submenus:

- Workspaces & Accounts
- Users
- Hierarchy
- User Invitations

Workspace & Accounts

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

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



Users

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

Accessing Users

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

Searching for Users

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

The search results include the following information for each user:

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

Editing a User

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

Viewing and Editing User Details

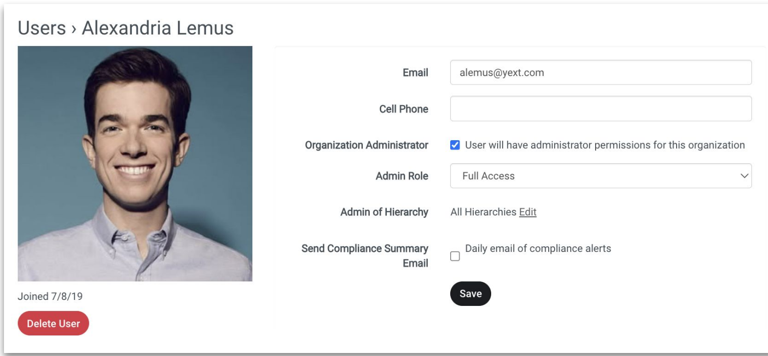
You can view and edit the following user fields near the top of the screen:

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

Deleting a User

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

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



Adding and Removing Workspaces

The **Workspaces** section within the User's profile allows you to view and edit the workspaces that the user manages. The list view displays the names of the current workspaces.

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

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

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

Managing Mobile Devices

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

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

Hierarchy

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

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

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

Follow the steps below to set up your Enterprise Hierarchy:

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

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

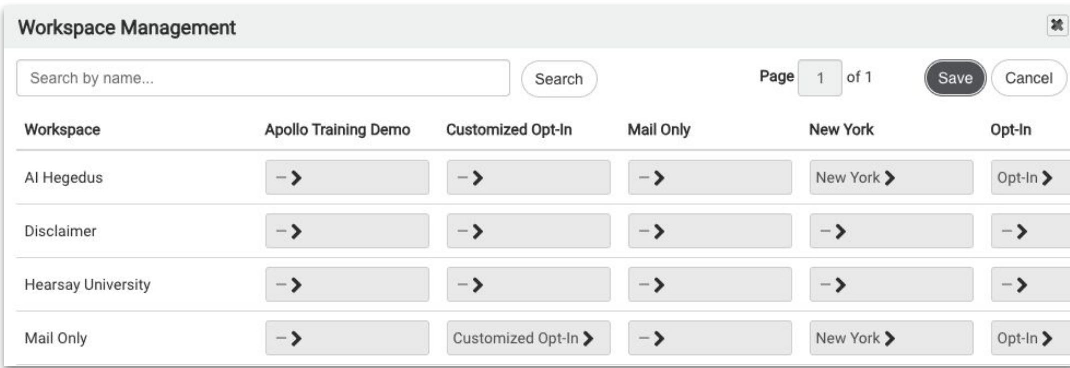
Follow the steps below to move a user to a new workspace within your organization.

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

Placing Workspaces within a Region

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

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



User Invitations

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

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

How to send an Invite:

1. Navigate to **Organization > User Invitations.**
2. Select the **User Type.**
3. Enter the User's email.
4. Enter a personal message (optional).
5. Click **Invite.**

Settings

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

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

Organization Settings

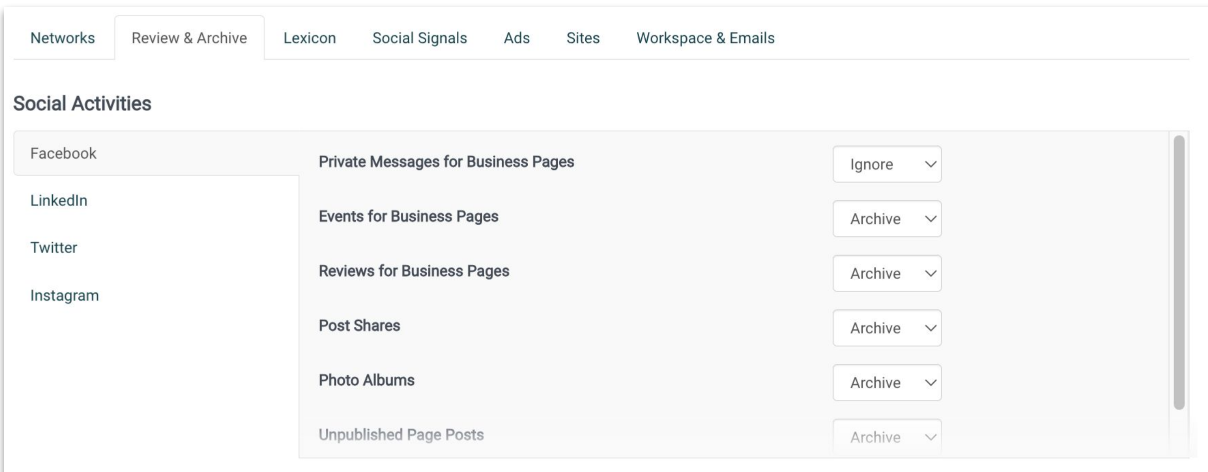
To access settings that can be set regionally for your organization, navigate to **Settings > Organization Settings.** You can navigate to a specific region in your Hierarchy by selecting the **All Hierarchies** dropdown menu. The default is **All Hierarchies.**

Networks Tab

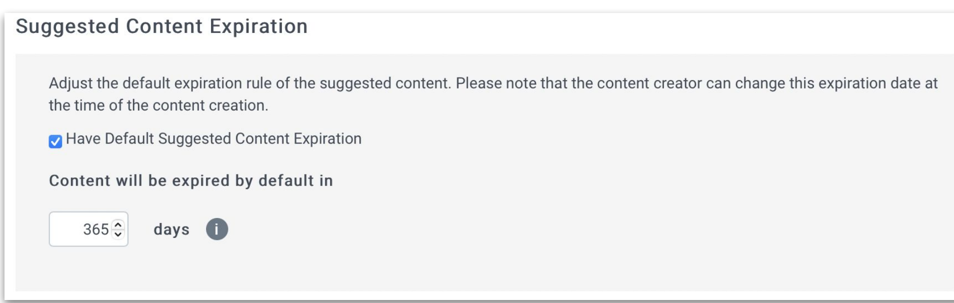
- **Available Account Types:** Select the accounts you want enabled/disabled. This affects the accounts that users can connect to Hearsay Social (Facebook, Instagram, LinkedIn, Twitter).
- **Social Profiles:** Hearsay Social can pull in different fields of users' static profile content for review by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

Review & Archive Tab

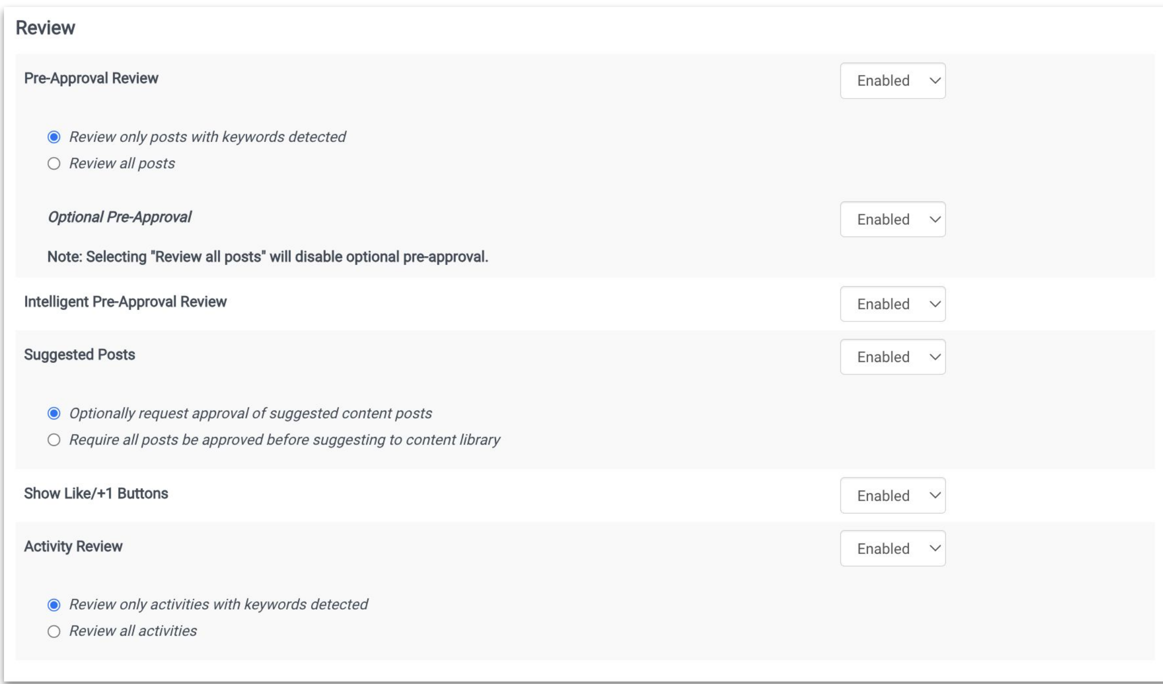
- **Social Activities (Archiving):** Hearsay Social can archive content from your organization's users' social media accounts, as well as collect and send this archived information to integrate into existing corporate records management and archiving tools. Archiving is generally used by highly regulated, compliance-focused organizations. If your organization requires content to be archived, select the sections you need turned on in order to comply with your social media policies.



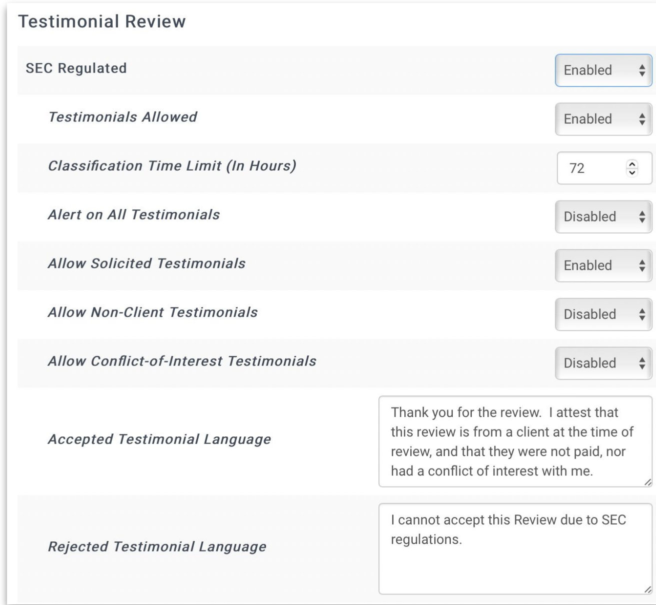
- **Suggested Content Expiration:** Adjust the default expiration rule of suggested content. Note: The content creator can change this expiration date at the time of the content creation.



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



- **Testimonial Review:** The SEC has implemented new rules that require advisors/agents to respond equally and appropriately to all testimonials they receive. To mitigate risk of non-compliance to the SEC's rule, admins can configure this setting according to whether the testimonial was left on Facebook or LinkedIn.



SEC Regulated

- Enabled: Testimonials left for advisors/agents are subject to these settings.
- Disabled: Ignore all testimonial checks and treat testimonials as they were before (same as a post or comment).

Testimonials allowed (LinkedIn only)

- Enabled: If yes, then following settings are used.
- Disabled: Testimonials are not allowed on LinkedIn and they will be hidden.

Classification Time Limit (in hours)

- Advisor/agent must respond to a testimonial within this time period or it is automatically disavowed. Can be set from 12 to 168 hours.

Alert on All Testimonials

- Enabled: Compliance must accept or reject every incoming testimonial.
- Disabled: Compliance accepts all testimonials that do not flag lexicon, and receives alerts on those that do flag.

Allow Solicited Testimonials

- Enabled: Testimonials won't be automatically disavowed if marked as solicited.
- Disabled: Testimonials marked as solicited will be disavowed and trigger a compliance review.

Allow Non-Client Testimonials

- Enabled: Testimonials won't be automatically disavowed if sent by a non-client.
- Disabled: Testimonials from a non-client will be disavowed and trigger a compliance review.

Allow Conflict-of-Interest Testimonials

- Enabled: Testimonials won't be automatically disavowed if a conflict-of-interest exists.
- Disabled: Testimonials that involve a conflict-of-interest will be disavowed and trigger a compliance review.

Accepted Testimonial Language (Facebook only)

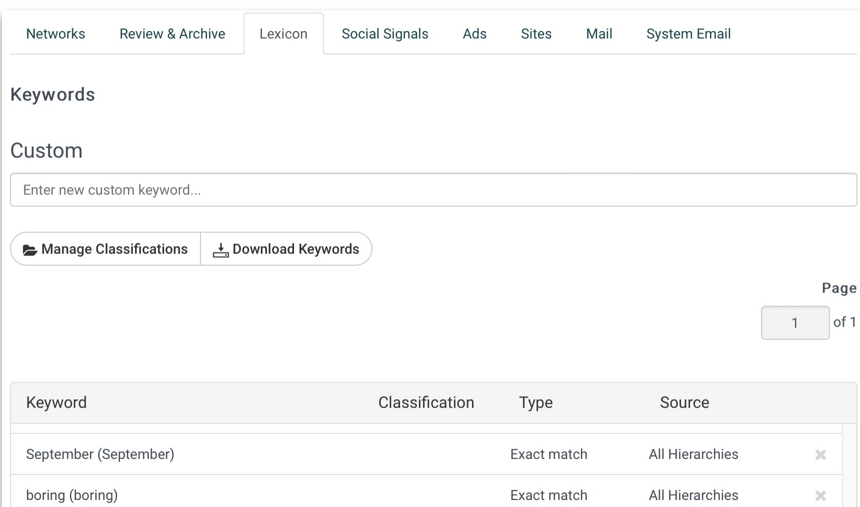
- Statement on accepted testimonials, up to 520 characters.

Rejected Testimonial Language (Facebook only)

- Statement on disavowed testimonials, up to 520 characters.

Lexicon Tab (Keywords)

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



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

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

Keyword Classifications

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

Segment for:

- Categories for reporting
- Infraction review filtering
- Escalation

Examples:

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

Matching Rules

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

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

Configuring Your Lexicon to Prevent Compliance Infractions

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

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

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

To add a Keyword:

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

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

To delete a Keyword:

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

To manage Keyword Classifications:

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

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

Social Signals Tab

Enabling **Social Signals** will give your users the option to let Hearsay Social scan their networks for important money-in-motion life events. Users will be able to view these signals both in Hearsay Social directly (via **Opportunities**) and in a weekly email update. Admins can choose which networks to enable/disable Signals for (LinkedIn or Twitter). Once you've enabled the **Social Signals** feature for your organization, users will have to turn on their own signals individually in the **Opportunities section** of their workspace.

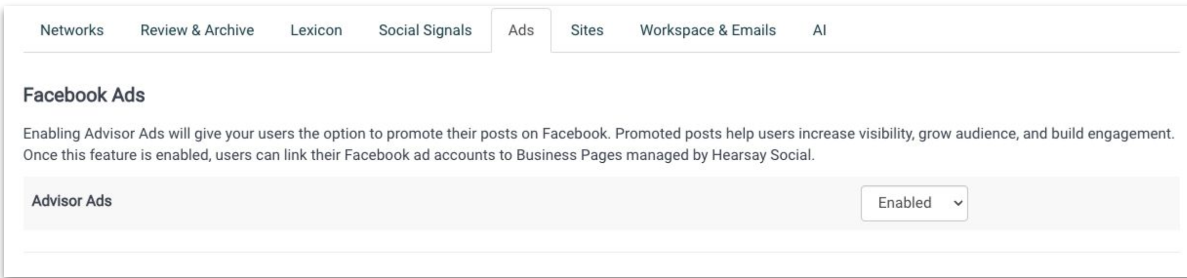
On LinkedIn, we detect changes in last name, headline, and location, industry and degree. Users need to have a LinkedIn Sales Navigator or Business Plus Premium Account in order to have access to social signals from this network.

On Twitter, we detect changes in name, location, follower count, and description.

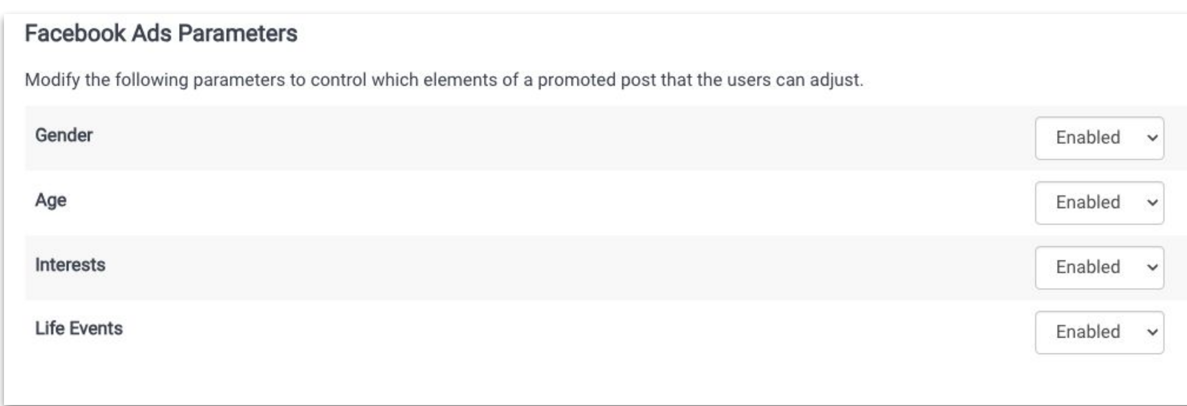
Ads Tab

The **Ads Tab** allows admins to configure settings for Facebook Ads and set Facebook Ads parameters.

- **Facebook Ads**
  Enabling Advisor Ads will give users the option to promote their posts on Facebook. Promoted posts help users increase visibility, grow audience, and build engagement. Once this feature is enabled, users can link their Facebook ad accounts to Business Pages managed by Hearsay Social. To enable this feature, select **Enabled** from the dropdown.



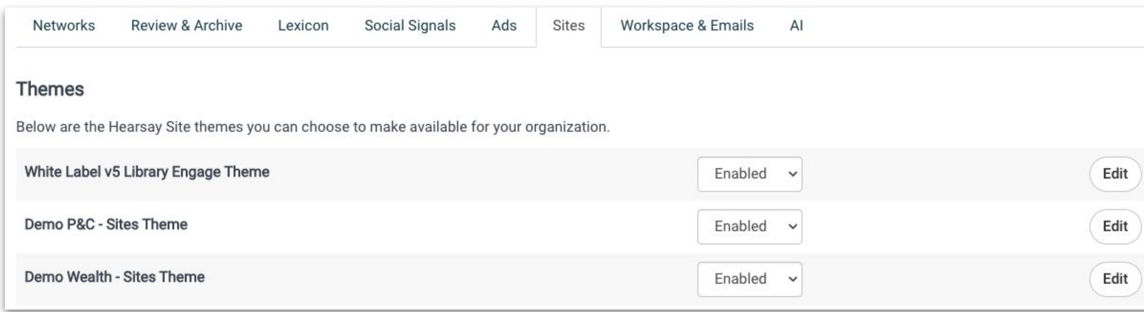
- **Facebook Ads Parameters**
  Modify the following parameters to control which elements of a promoted post that users can adjust. The following parameters are available:
  - Gender
  - Age
  - Interests
  - Life Events



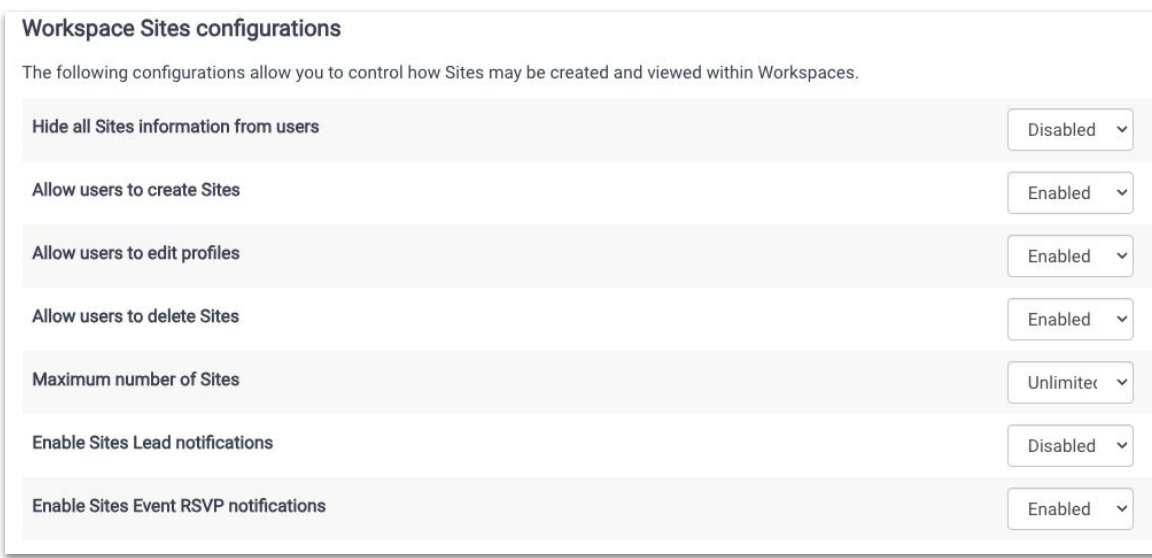
Sites Tab

The **Sites Tab** allows admins to enable Themes and Workspace Sites Configurations.

- **Themes**
  Select **Enabled** from the dropdown to make themes available for your organization.



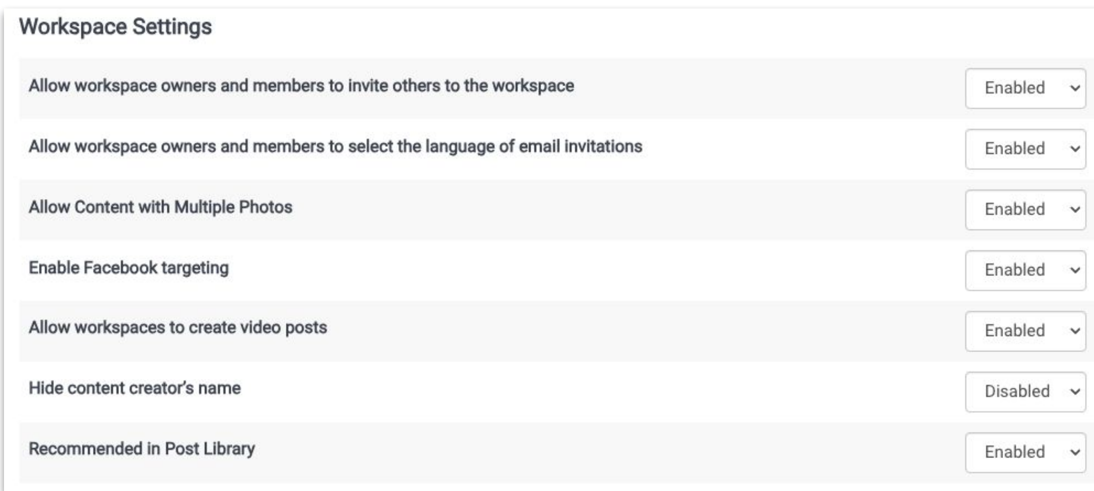
- **Workspace Sites Configurations**
  Configure how Sites may be created and viewed within Workspaces by using the **Enabled/Disabled** dropdown accordingly.



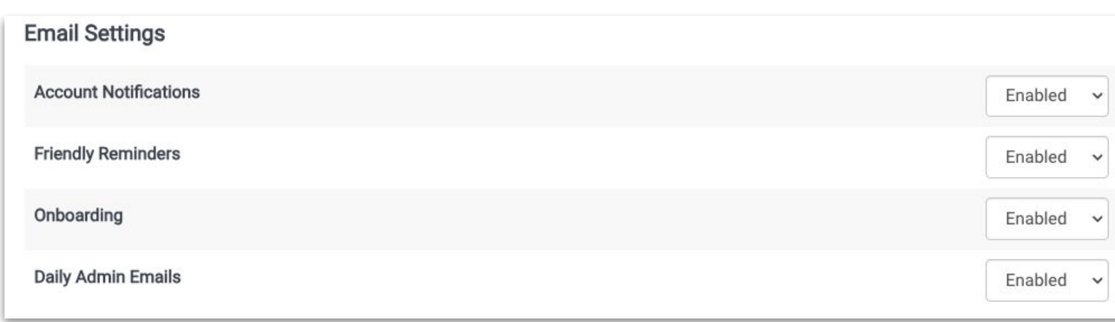
Workspace & Emails Tab

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

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



- **Email Settings** - Admins can enable/disable the following:
    - Account Notifications
    - Friendly Reminders
    - Onboarding
    - Daily Admin Emails



AI Tab

After Hearsay turns this feature on for your organization, admins can enable it from the **AI Tab.**

- **Create New Post with AI**
  Enabling this feature will allow advisors/end users to generate social media post descriptions using **Generative Artificial Intelligence** (AI). Advisors will be able to choose the tone and length of the description and select specific words or phrases to include in the description to generate the most relevant and helpful text. End users will be able to edit text and add images and links as needed before publishing.

  To enable this feature, select **Enabled** from the dropdown.

Setting Overrides

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

Queues

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

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

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

Content Tags

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

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

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

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

To create and edit a tag:

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

URL Shortening

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

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

Connecting bitly with Hearsay

For the entire organization:

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

For a specific region:

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

Configuring in Bitly

Set default group:

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

Set default domain:

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

Integrations

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

Follow the steps below to generate a new API token.

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

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

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

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

In the event a token is communicated via an insecure channel, Hearsay policy requires the token be promptly deactivated. Should this occur, you will be notified of the deactivation and will be required to generate a new token using the steps above. For detailed information on APIs in Hearsay Social, refer to the API documentation on Hearsay Developer Reference (password: HearsayDocs).

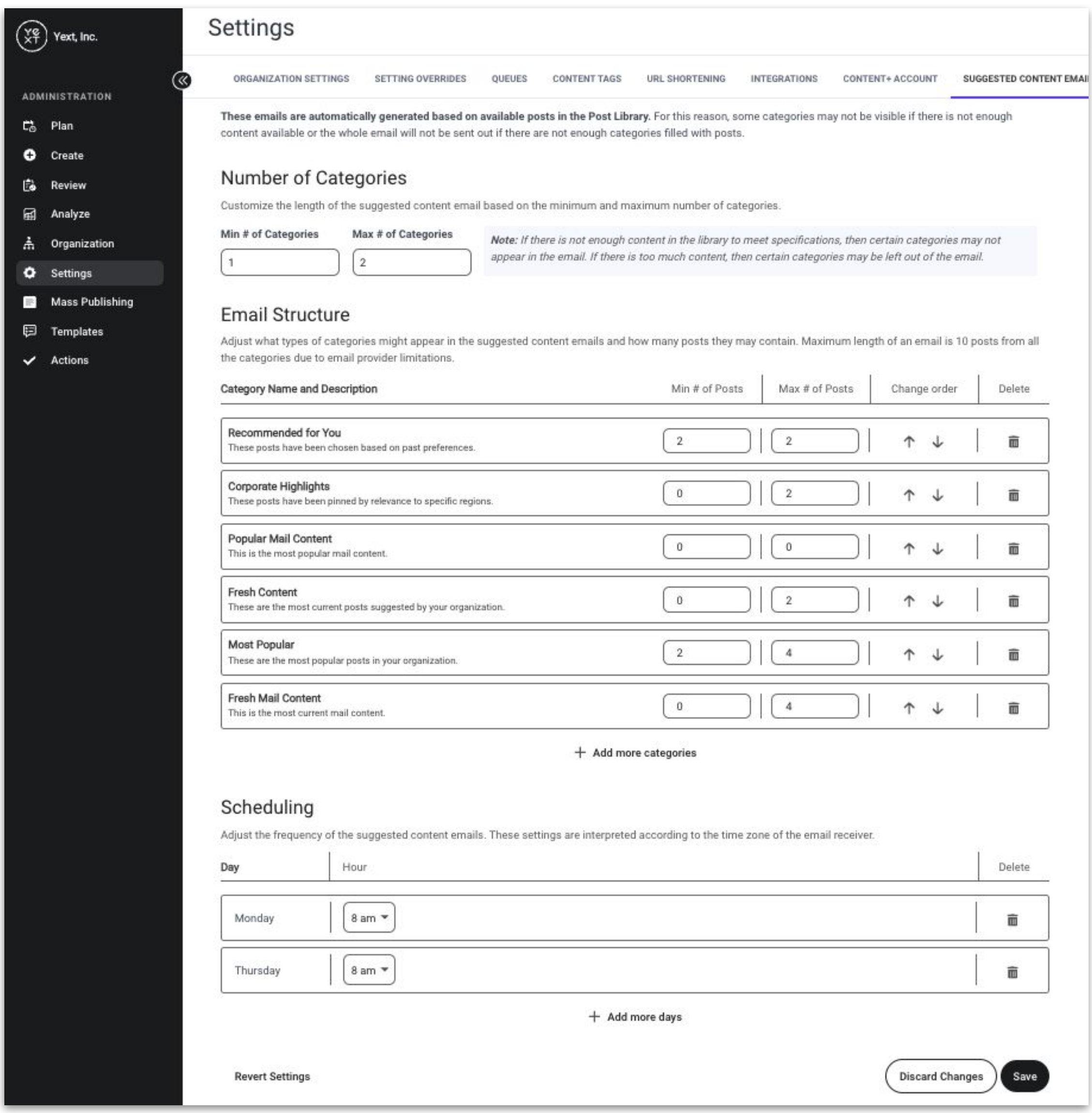
Content+ Account

You can view your connected Content+ account and disconnect it from this page.

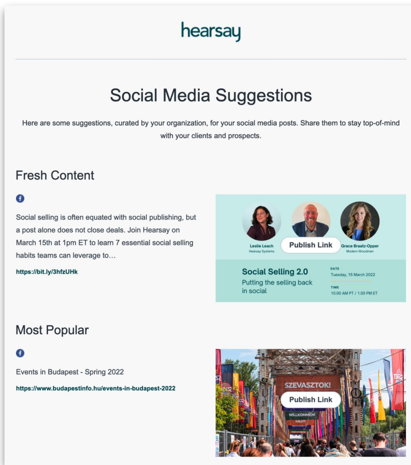
Suggested Content Email

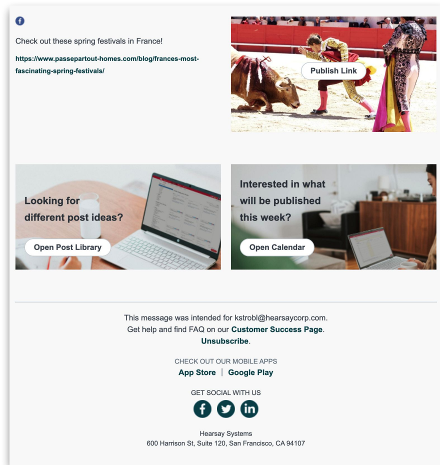
The Suggested Content email that advisors and agents receive has a section dedicated to content from the Content Library that is personalized for each specific workspace. Admins have the capability to manage the Suggested Content Email in the **Settings Menu.** There, you can find a feature called **Customize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

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



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





Configuration Rules

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

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

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

Default Configuration of the Suggested Content Email

Customizing the Suggested Content Email is optional for an organization.

If the org does NOT want to customize the email:

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

Default Suggested Content Emails can include the following content:

Pinned Posts ("Corporate Highlights")

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

Personalized Posts ("Recommended for You")

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

Recent Posts ("Fresh Content")

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

Popular Posts ("Most Popular")

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

Controlling Content

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

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

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

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

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

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

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

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

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

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

Additional Admin Features

URL Translation, Advisor Attribution and Dynamic URLs

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

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

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

For example:

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

URL Translation and Advisor Attribution

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

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

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

Some common use cases for this are:

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

Benefits:

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

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

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

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

Examples include:

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

Dynamic URLs

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

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

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

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

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

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

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

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

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

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

Admin Best Practices

Marketing Admin Best Practices

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

Compliance Admin Best Practices

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