



# Getting Started on Instagram

End Users

## CONNECT INSTAGRAM BUSINESS PROFILE

Instagram's API only allows for posting to Instagram Business Profiles. Before you can connect your Instagram to Hearsay Social, you must first convert it to a Business Profile. We recommend doing this on the desktop through Facebook.

By far the most successful way to convert your Instagram profile is through your Facebook page. This will also automatically connect your Instagram Business Profile to your Facebook Page, circumventing the possibility of accidentally making a new Facebook Page.

To connect your Facebook Page and Instagram account:

1. Click Settings at the top of your Page.
2. Click Instagram in the left column.
3. Click Log in.
4. Enter your username and password and click Log In.

As you follow the instructions on your screen, Facebook will then take you through the process of converting your profile. You can then go to Hearsay Social and connect Instagram under Workspace Settings > Accounts.

With the Hearsay Social Instagram integration, you can reach over 1 billion Instagram users in the US and across the globe. You can connect an Instagram Business Profile and create and publish content to Instagram from both your desktop and the mobile app.

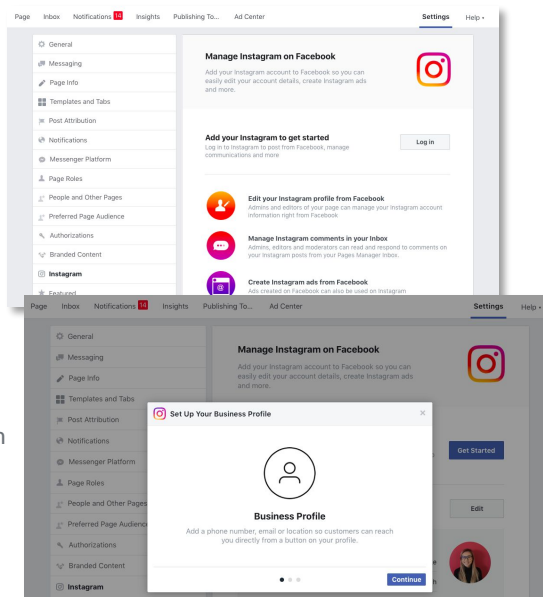


## CREATING CONTENT FOR INSTAGRAM

### On Desktop:

Because Instagram is an image-first platform with photo restrictions, Hearsay Social has been optimized for use with its API. If your organization allows you to create custom content, please note these restrictions:

- Only single photos can be published to Instagram.
- Photos should be under 8MB size and between 150x150 and 1920x1080 pixels.
- For best viewing quality, we recommend you choose between 3 photo sizes:  
**Square - 1:1 ratio**  
**Portrait - 4:5 ratio**  
**Landscape - 1.91:1**



### On Mobile:

We are excited to offer Instagram inside the Hearsay Social Mobile App. The app offers suggested content as well as the ability to post original content (which it is uniquely suited for).

In the mobile app, you will be able to:

- Publish, schedule or request approval of a single photo post to Instagram
- Upload and crop images using preset sizes: Square, Portrait and Landscape for the best viewing quality
- Search for Instagram posts in the library

Please note that the cropping feature is only available in the Mobile App. Because cropping is available, you can select any photo to upload and you will be able to crop it to the correct dimensions within the Hearsay Social mobile app.

## SHARING MULTIPLE IMAGES IN INSTAGRAM POSTS

Agents and advisors can publish multiple photos **natively** on Instagram and Hearsay will automatically capture those images from the network and include them in archiving. This feature is on by default if Instagram is enabled for the organization. The multi-photo post will create a Supervision alert but the images will not be displayed in Supervision. The Instagram API does not support posts with multiple photos to be published through Hearsay; the action must be completed natively on Instagram.



Landscape (1.91:1)



Square (1:1)



Portrait (4:5)

## ADDITIONAL FEATURES

Hearsay supports the majority of the IG offering. This includes image and multi-image IG posts, as well as comments and other activities. Two additional features we support are:

- Archiving and compliance for videos
- Capture and supervision of Direct Messaging

### ABOUT HEARSAY SYSTEMS

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

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