

hearsay

# Hearsay Relate User Guide



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

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

# Product Overview

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

## KEY FEATURES

Some of the high level capabilities of Hearsay Relate are:

- Sending Text Messages
- Sending Broadcast & Group Messages
- Scheduling Texts and Reminders
- Using Message Templates
- Sharing On-Demand Links
- Receiving VOIP Inbound Calls
- Making VOIP Outbound Calls
- Managing Contacts

## GET SUPPORT

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EMAIL

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HELP CENTER

<https://success.hearsaysocial.com/hc/en-us>

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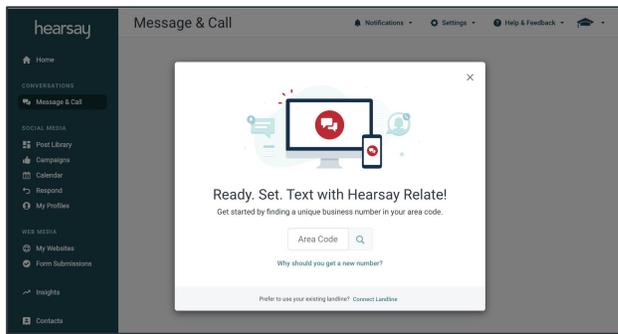
Our field is the most productive it has ever been. We feel so much closer to our clients now that we are able to reach them at these critical moments.

# Getting Started

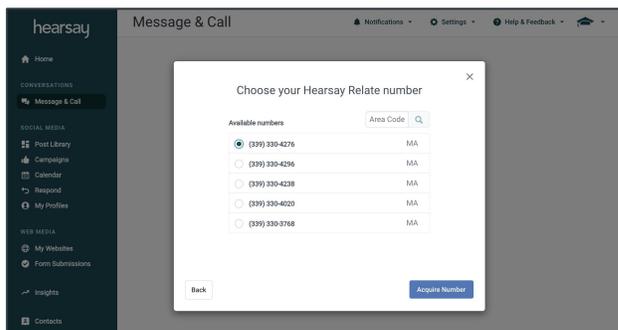
## Create a Hearsay Relate Number Using a Desktop Computer

To create a Hearsay Relate dedicated number:

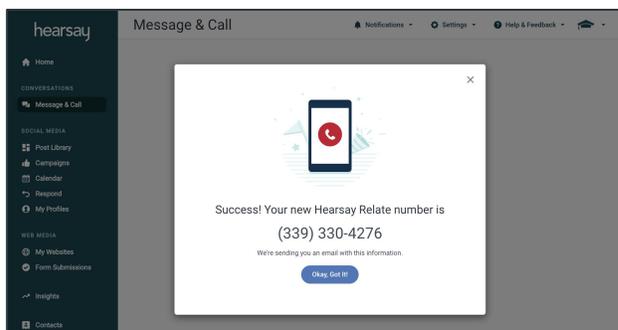
1. Log into your Hearsay workspace and click **Message & Call** from your side navigation bar.
2. Type in the 3-digit area code and click the Magnifying Glass to search for available local numbers.



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



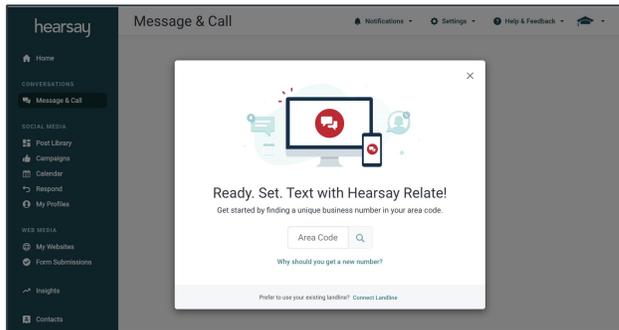
4. Click **Okay! Got It.** to complete the process. You will receive an email from [support@hearsaysystems.com](mailto:support@hearsaysystems.com) with your Relate phone number information.



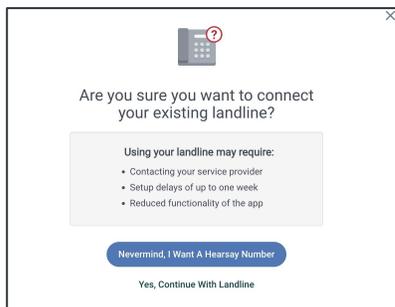
## Connect an Existing Landline Using a Desktop Computer

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

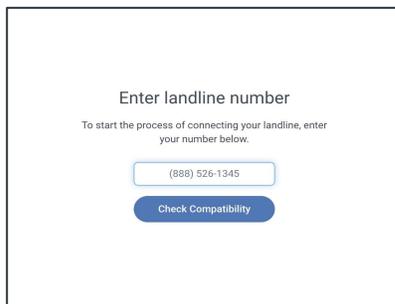
1. Log into your Hearsay workspace and click **Message & Call** from your side navigation bar.
2. Click **Connect Landline** located at the bottom of the pop-up screen.



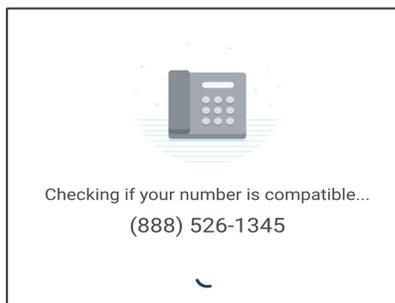
3. Confirm you want to connect your landline by clicking on **Yes, Continue with Landline**.



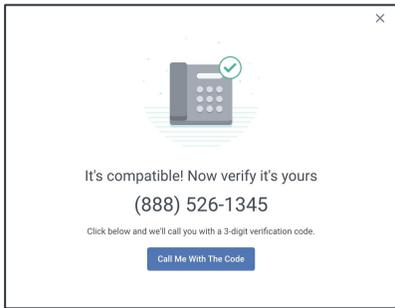
4. Enter your landline number and click **Check Compatibility**.



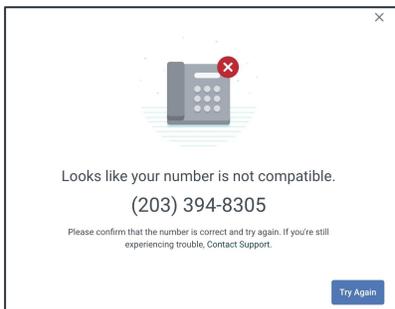
5. Your landline number will be checked for compatibility.



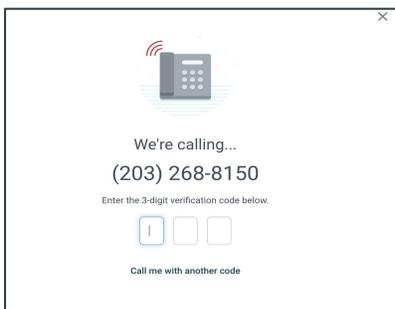
6. If your landline number is compatible, click **Call Me With The Code** to verify your number.



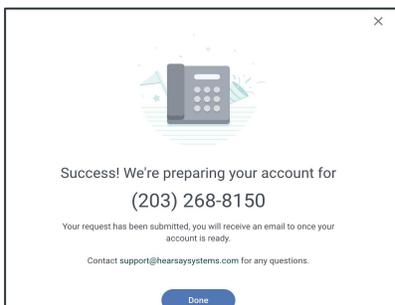
If your landline number is not compatible, you will see a screen to Try Again or to contact Hearsay Support.



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



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

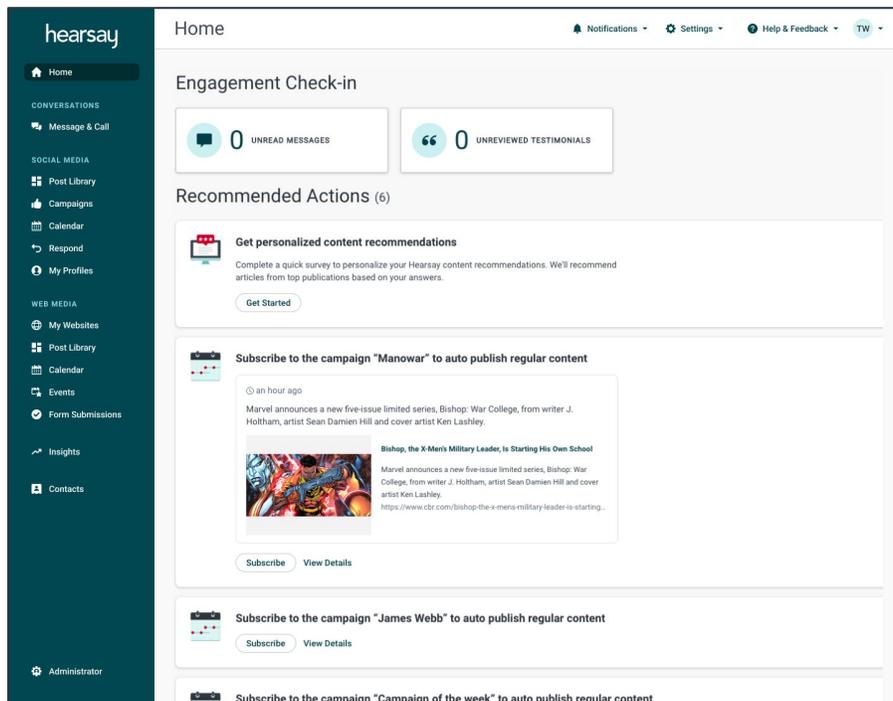


# Home Page (for users with Social + Relate)

## See Relate Notifications on the Homepage

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

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



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

# Conversations

## Attestation

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

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

## Send the Opt-In Attestation Text

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

Send Message
✕

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**To:**

(203) 394-8305

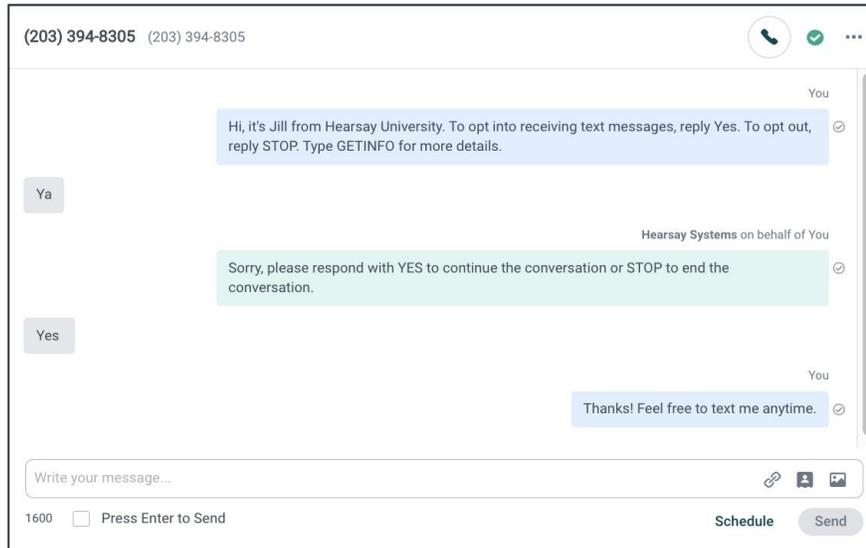
**Message:**

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

Cancel
Send

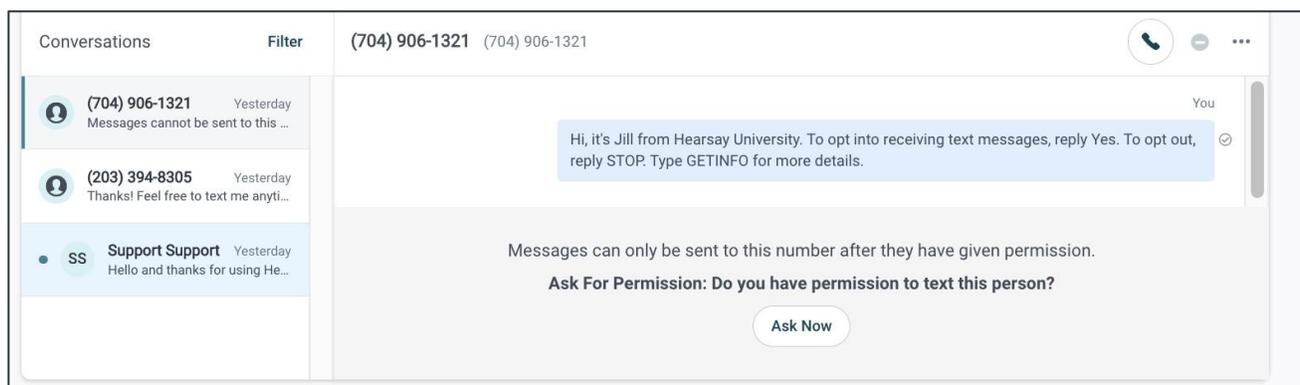
## Opt-In Guidance Follow-Up Text

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



## Resend the Opt-In Attestation Text

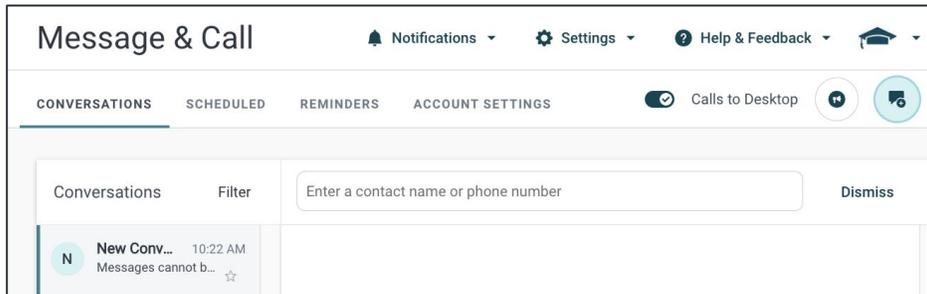
If the contact does not respond for 24 hours, you will be able to re-send the opt-in message up to 5 times total. To resend, locate your contact's conversation and click **Ask Now**. This button will only re-appear once 24 hours have passed since your prior attempt.



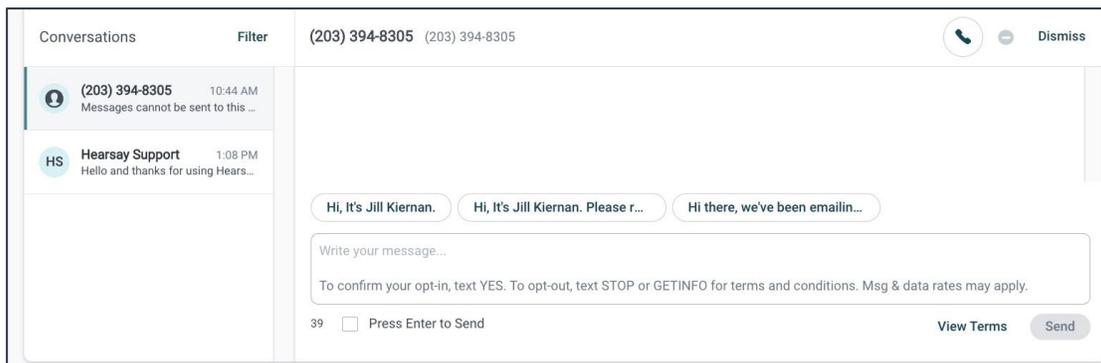
## Customize the Opt-In Attestation Text

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

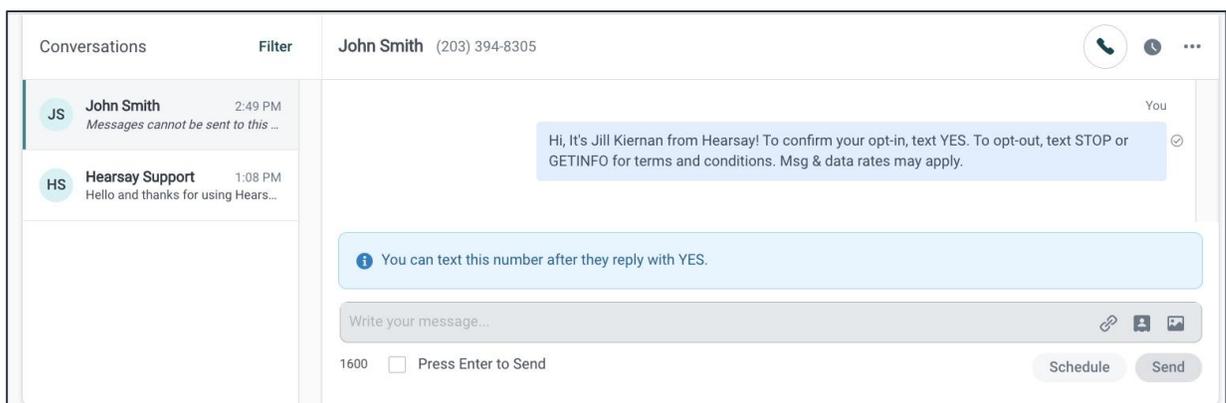
1. Click the **New Conversation icon** in the top-right corner of your workspace.
2. Type in the name or phone number of the contact you wish to text.



3. You will be presented with the screen shown below. Type in your custom text where it says "Write your message..." to proceed. Once you have typed in your message, click **Send**.  
**Note: Per compliance rules, the following message will be appended with your text: "Text YES to opt-in, to opt-out text STOP. Type GETINFO for more details."**

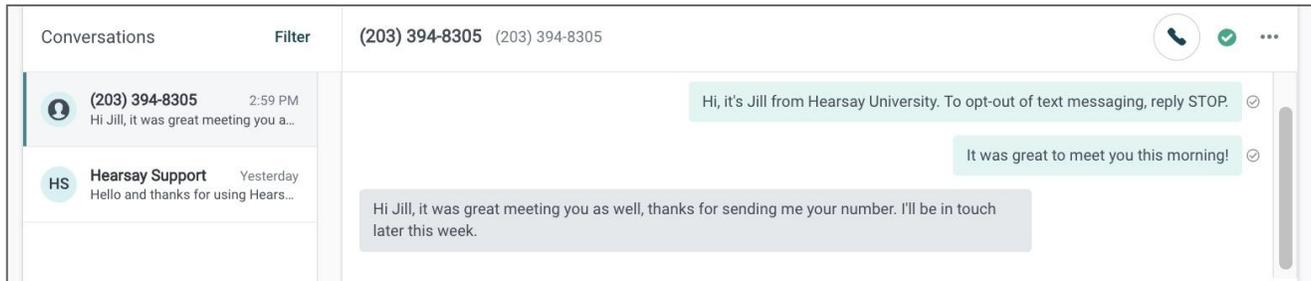


4. Your message will then be combined with your organization's Opt-In requirement, allowing your contact to respond YES once they are ready to text.

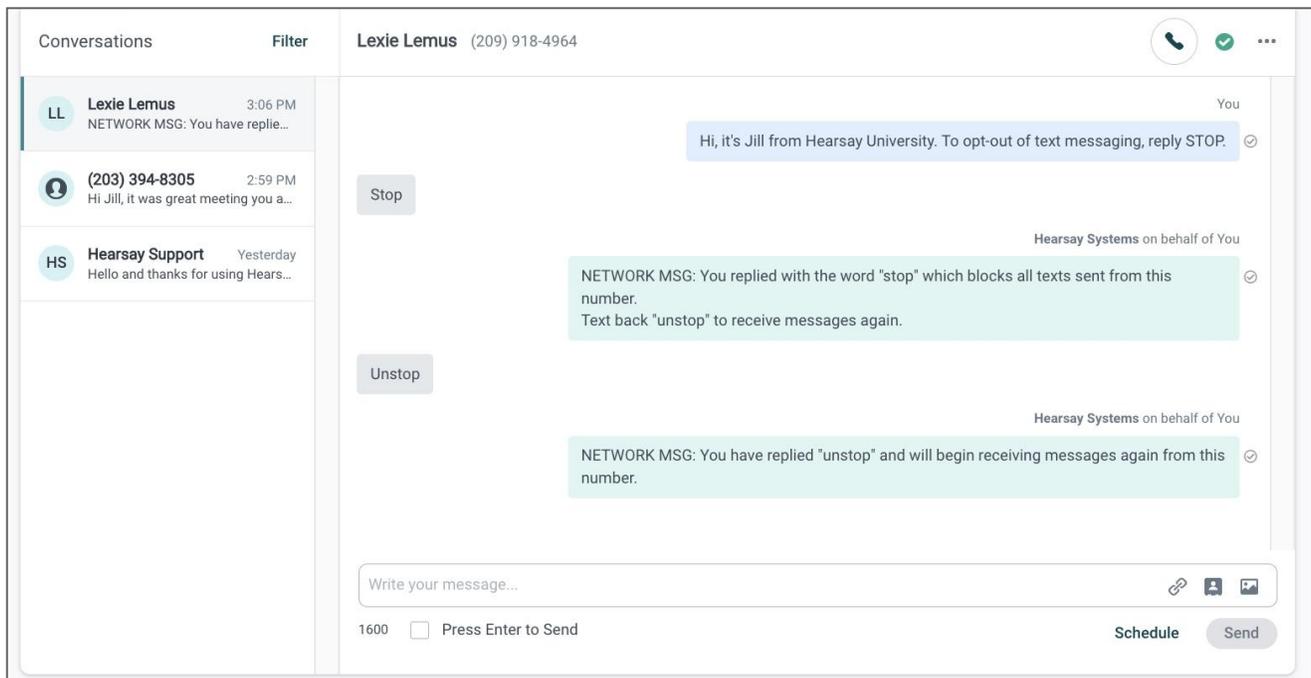


## Implied Opt-In

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



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



## Opt-In Web Link

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

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

The image shows two side-by-side screenshots. The left screenshot is from the 'Message & Call' interface, specifically the 'ACCOUNT SETTINGS' tab. Under the 'Account' section, there is a 'Your Contact Info' box with fields for Name (Alexandria Lemus), Relate Number ((415) 462-1934), and Email (alemus@hearsaycorp.com). Below this is a 'Share Consent Link' section, marked with a circled '1', which contains a link: [https://optin.hearsaysocial.com/1340/text\\_message/phone/+14154621934/](https://optin.hearsaysocial.com/1340/text_message/phone/+14154621934/) and a 'Copy' button. The right screenshot is the 'Opt in for Text Messaging' form. It features a header with two speech bubbles, a message: 'Hi, it's Jill from Hearsay University. To opt in, please provide your name and phone number below.', and three input fields for 'First Name', 'Last Name', and 'Mobile Number'. Below the fields is a consent statement: 'I consent to allowing Jill Kiernan to send me text messages on behalf of Hearsay University and terms of service.', marked with a circled '2', and an 'Opt In Now' button.

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

The image shows a screenshot of a text message conversation in the Hearsay Relate interface. The contact is 'Zak Fargo' with the phone number '(203) 394-8305'. The conversation history shows a message from 'Zak Fargo' at 3:35 PM: 'Hello +12033948305! Thank you ...'. Below that is a message from 'Hearsay Support' at 3:12 PM: 'Hello and thanks for using Hearsay...'. The current message, from 'Hearsay Systems on behalf of You', is: 'Zak Fargo: Signed up to receive text messages via Web Form.' followed by 'Hello (203) 394-8305 Thank you for opting in for texting with Jill Kiernan at Hearsay University. Text STOP to Opt Out, GET INFO to learn more.' The message is marked as read with a checkmark icon.

## Send and Schedule Text Messages

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

### To send and schedule text messages from your computer:

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

Write your message...

1600  Press Enter to Send

Schedule Send

To  
Zak Fargo

Message  
Good morning, Zak! How's your week going?

1559 Characters Remaining

Scheduled Time

Date Time  
Wednesday, Apr 06 09:45 AM EDT

Close Schedule

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

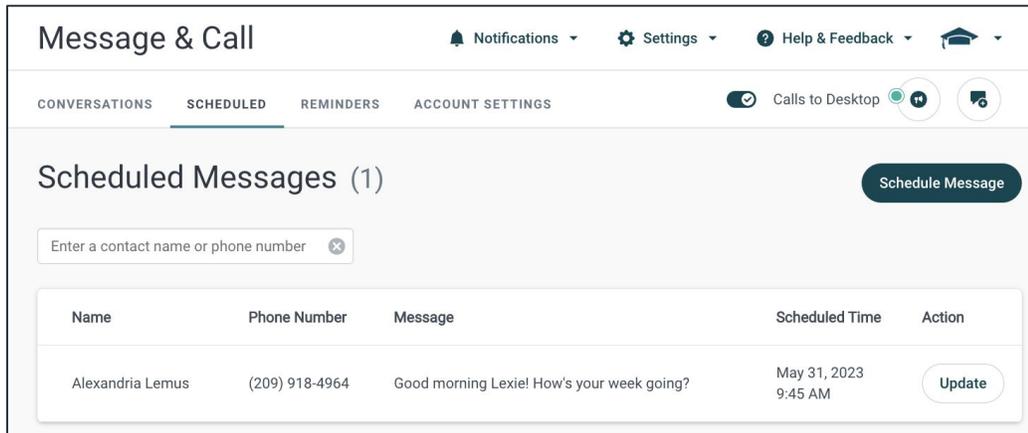
View Scheduled Messages (1) ^

Write your message...

1600  Press Enter to Send

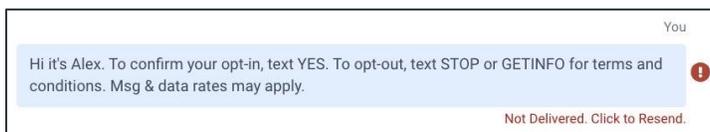
Schedule Send

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

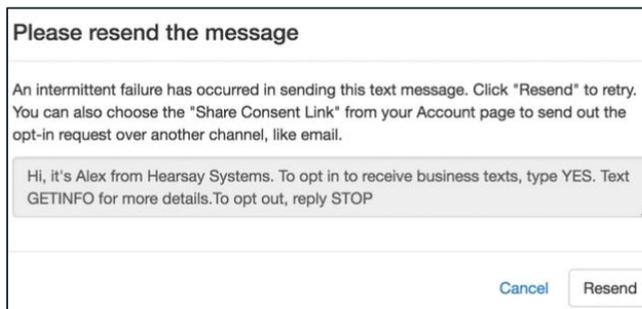


## Resend a Text Message

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



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



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

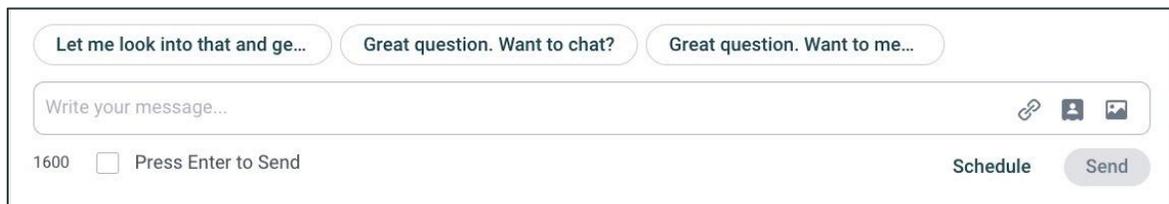
## Quick Replies

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

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

### To use Quick Replies:

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



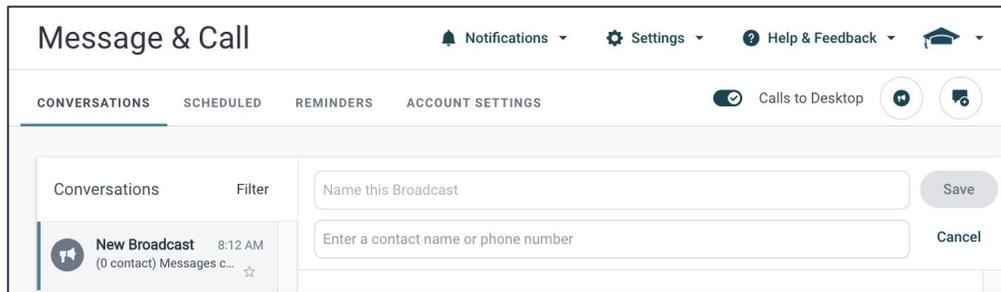
## Broadcast Messages

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

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

### To create a broadcast message:

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



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

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

### Additional Notes:

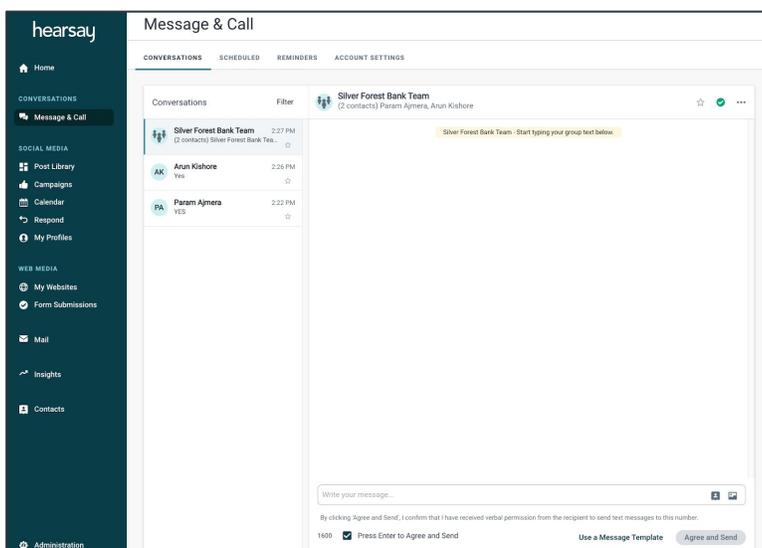
- Users must send their first text via the desktop application. After that, users can send Broadcast messages from either the desktop or mobile application.
- Replies to messages sent with Broadcast lists will never go back to the Broadcast list, but will instead appear as individual 1-1 messages. It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

## Group Messages

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

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

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



## Message Templates

Message templates allow users to save time when sending the same message to different clients. Users can access available templates that your organization has created in the Relate message composer. If enabled, users can also create their own templates in the **My Templates** tab.

To create a template:

1. From the side menu, under Conversations, click **My Templates**.
2. Click on the dark teal button for **New Template** at the top right. This opens the **Create New Template** publisher where you can enter the template name and text. Then select to save as draft or publish to your message templates.

Create New Template

Template Name \*

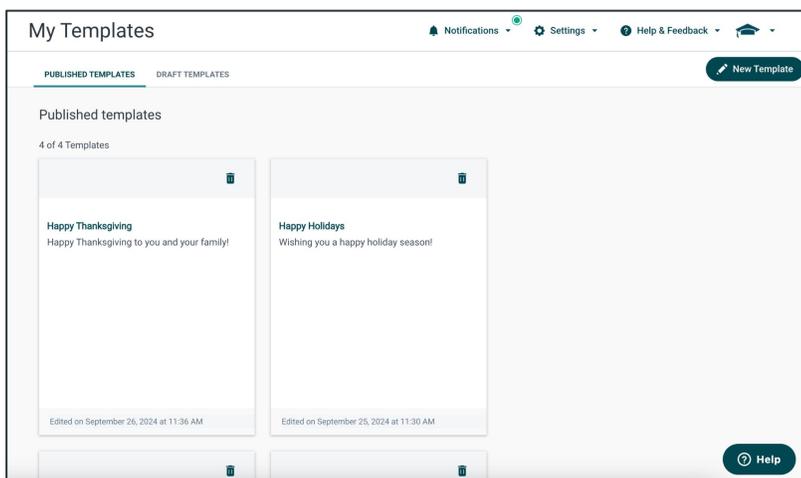
Each template name must be unique.

Template Body \*

1600

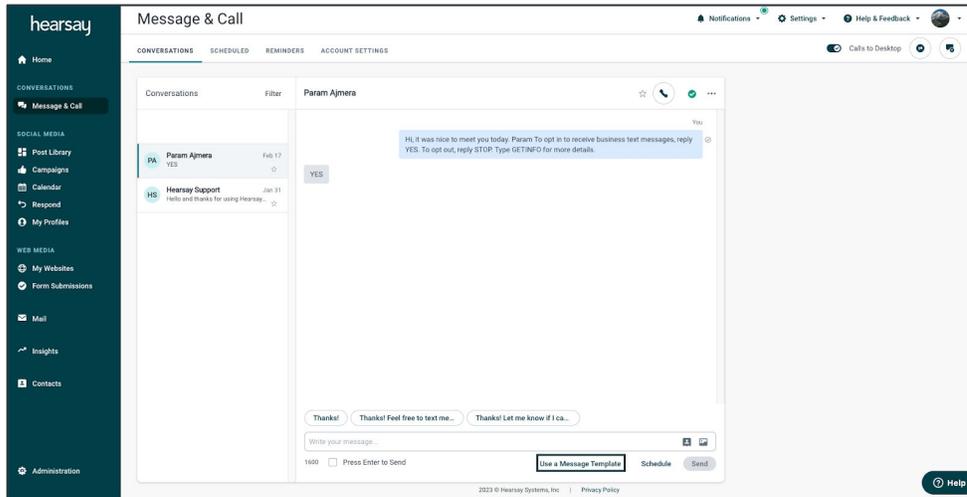
Cancel Save as Draft Save and Publish

3. Published templates can be deleted but they cannot be edited after publishing. A new template would need to be created if any changes are required.

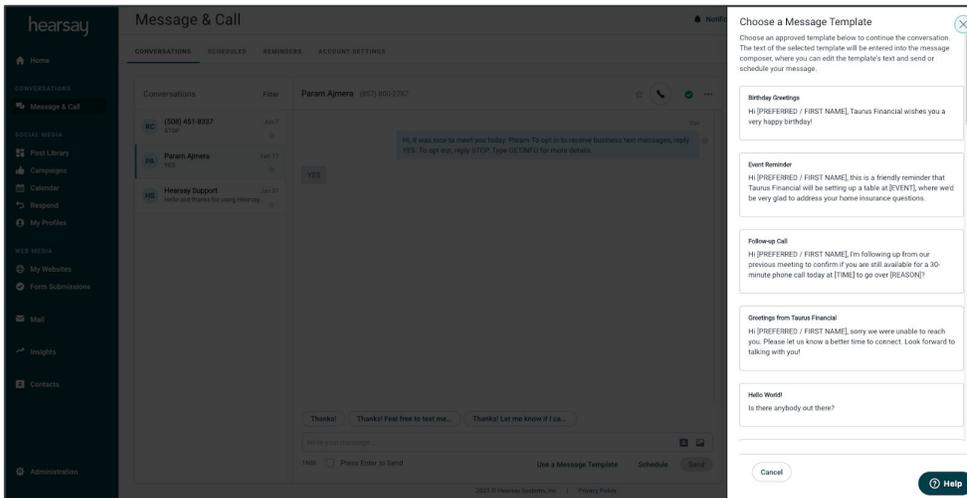


To add a template to a text message:

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



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



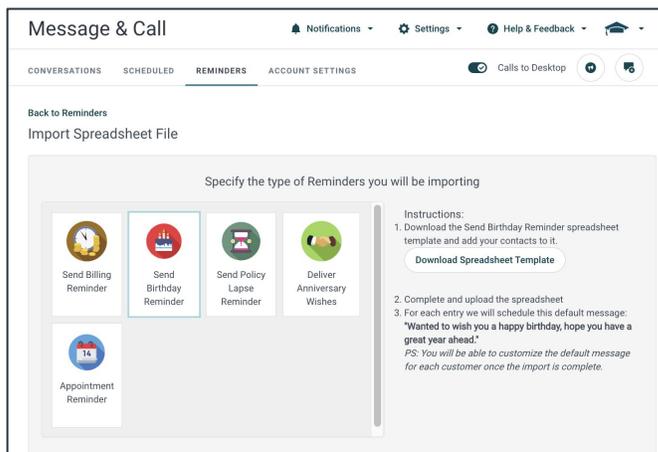
5. The text of the selected template will be entered into the message composer, where you can edit, send or schedule the message.

## Reminder Messages

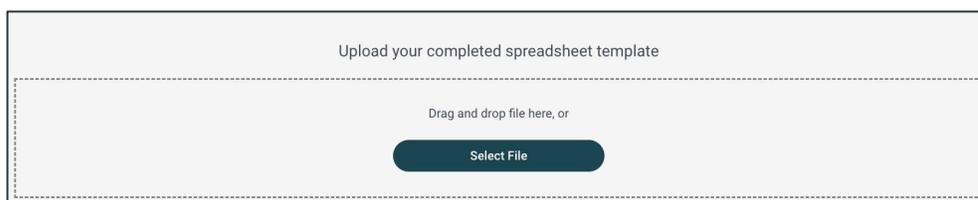
Hearsay Relate Reminders allow you to schedule greetings, birthday wishes and appointment reminders for either a select group of contacts or your entire book of business with just a few clicks. By entering in the appropriate information within a spreadsheet, Hearsay Relate can templatzize important text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

### To get started, follow these steps:

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



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



## 6. Then click **Continue**.

Import Spreadsheet File

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

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

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

[Continue](#)

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

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

## Share your Contact Card in Text Messages

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

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

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

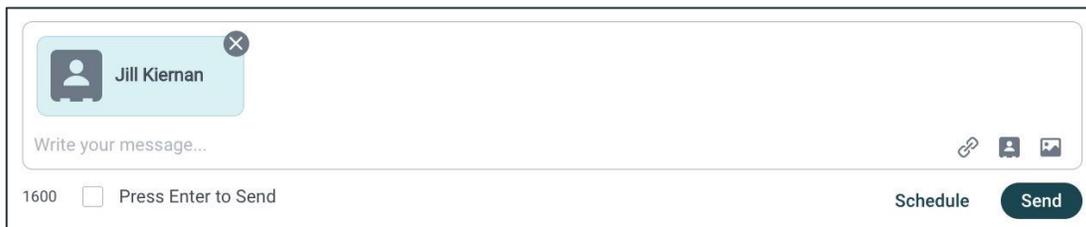
The screenshot shows the Hearsay Relate interface. On the left is a dark navigation sidebar with the Hearsay logo and menu items: Home, Message & Call (selected), Post Library, Campaigns, Calendar, Respond, and My Profiles. The main content area is titled 'Message & Call' and has tabs for CONVERSATIONS, SCHEDULED, REMINDERS, and ACCOUNT SETTINGS (selected). Below the tabs, there's a 'Calls to Desktop' toggle and two circular icons. The 'Account' section is visible, showing 'Your Contact Info' with the following details:

- Name: Alexandria Lemus
- Relate Number: (415) 462-1934
- Email: alemus@hearsaycorp.com

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



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



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

## Share On-Demand Links in Text Messages

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

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

Links to Insert into Messages

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

**Calendar Link**

**Video Conference Link**

**Client Portal Link**

Cancel **Save Changes**

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

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

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

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

Write your message...

1600  Press Enter to Send



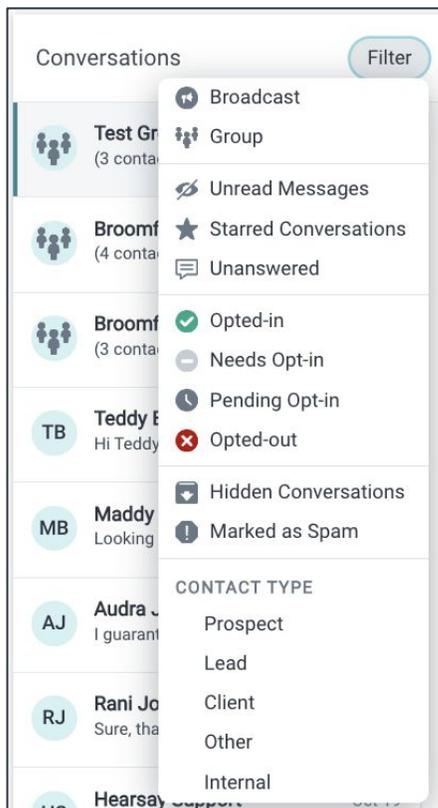


Schedule **Send**

## Filter Conversations

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

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

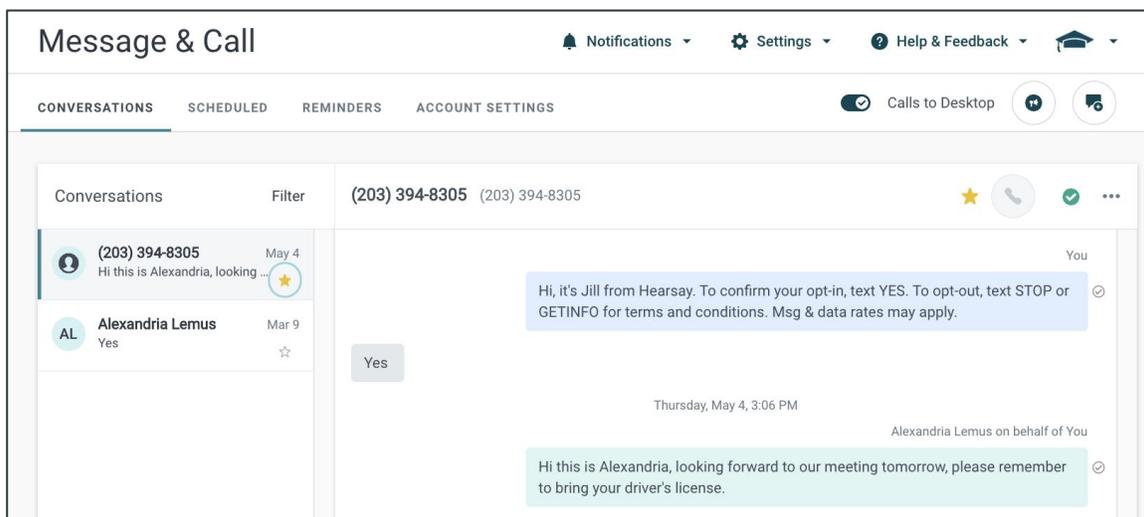


You can choose to hide or mark a conversation as spam from a conversation by selecting the three-dots icon on the right-hand side to display your options. In addition, Workspace Owners can conceal select text messages to keep sensitive information private.

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



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

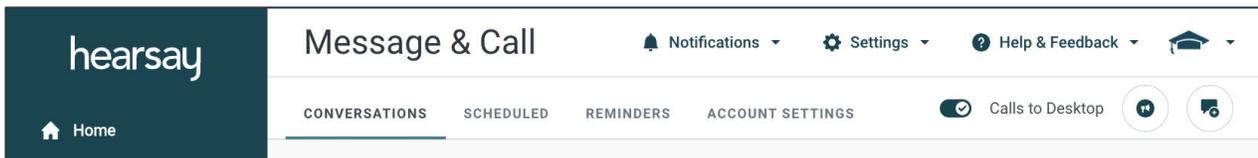


# Phone Calls

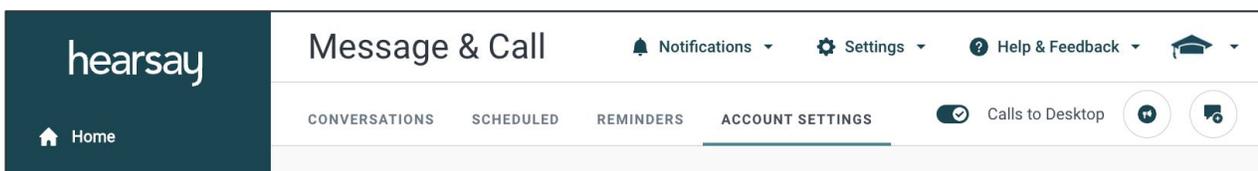
## Answer Incoming Hearsay Relate Calls from Your Computer (Inbound VOIP)

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

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



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



### Inbound Call Handling

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

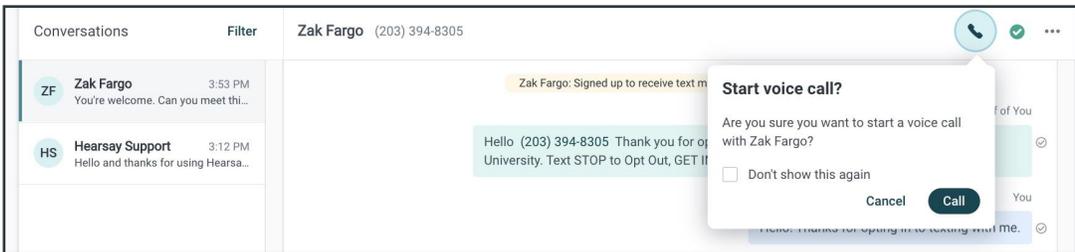
Cancel Save Changes

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

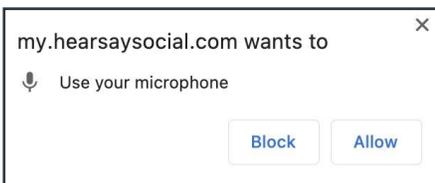


## Make Outbound Hearsay Relate Calls from Your Computer (Outbound VOIP)

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



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



## In-App Voicemail

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

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

The screenshot shows the 'Voicemail Greeting' settings page. At the top, it says 'Personalize your voicemail greeting by selecting **Custom Greeting** and recording your message below.' There are two radio button options: 'System Default Greeting' and 'Custom Voicemail'. The 'System Default Greeting' option is selected, and below it is a text box containing the text: 'Sorry, the number you've dialed is not available. Please leave a message after the tone.' The 'Custom Voicemail' option is also visible, with a 'Record New Greeting' button and a 'Stop Recording' button. Below these buttons is a progress bar showing '0:00 / 0:09' and a speaker icon. At the bottom, there are 'Cancel' and 'Save Changes' buttons.

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

The screenshot shows a conversation view with a missed voice call notification. The notification says 'Missed Voice Call 8:25 AM PDT'. Below the notification is a 'Voicemail' section with a play button and a progress bar showing '0:00 / 0:03'. Below the play button is a text input field with the placeholder text 'Write your message...'. At the bottom, there is a '1600' character count, a checkbox for 'Press Enter to Send', and 'Schedule' and 'Send' buttons.

## Set Working Hours and Auto-Reply

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

### To set working hours:

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

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

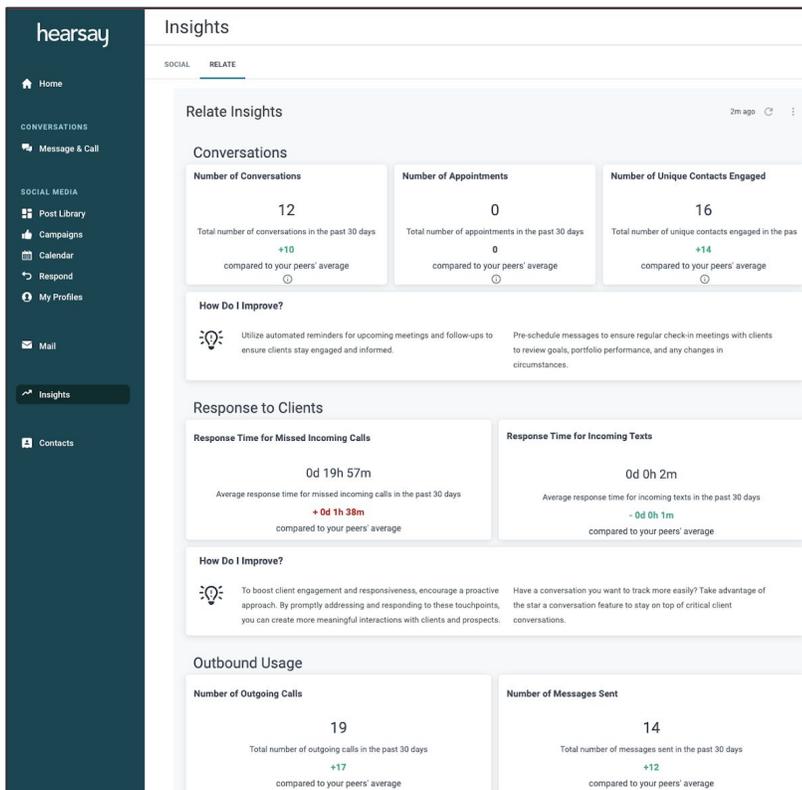
5. If desired, underneath the working hours section, checkmark the box that states Enable outside of working hours auto-reply text.
6. You will then be presented with a box where you can enter in your custom message.
7. Click **Save Changes**.

# Insights

The Relate Insights dashboard is available to users from the Insights page in the side menu. The Relate Insights dashboard provides data and visualizations of key business measures over a 30-day period for an individual workspace, identifies where a user's Relate performance is better or worse than the performance of their peers, and gives recommended actions to boost client engagement.

The Relate Insights dashboard provides the following measures:

- Number of Conversations
- Number of Appointments
- Number of Unique Contacts Engaged
- Response Time for missed incoming calls
- Response Time for incoming texts
- Number of Incoming/Outgoing calls
- Number of Incoming/Sent messages
- Number of New Contacts
- Number of Contacts Opted-In



The screenshot displays the Hearsay Insights dashboard. On the left is a dark sidebar with navigation options: Home, Message & Call, Post Library, Campaigns, Calendar, Respond, My Profiles, Mail, Insights (highlighted), and Contacts. The main content area is titled 'Insights' and has tabs for 'SOCIAL' and 'RELATE'. It is divided into three main sections: 'Inbound Usage', 'Inbound Communication', and 'Contacts'. Each section contains key metrics, a line chart, and a 'How Do I Improve?' tip.

### Inbound Usage

Metric	Value	Change
Number of Incoming Calls	2	+1
Number of Incoming Messages	21	+18

**Inbound Communication**

Line chart showing 'Calls' (blue) and 'Messages' (green) from Feb 12 to Mar 11. Messages show a significant spike on Mar 11.

### Contacts

Metric	Value	Change
Number of New Contacts	16	+12
Number of Contacts Opted-in	4	+4
Percentage of Contacts Opted-in	25%	+13%

**How Do I Improve?**

- Inbound Usage:** Celebrate their wins and milestones... Leverage group texting to streamline communication across multiple contacts.
- Contacts:** Provide clients with opt-out options for text message communications... Connect with a client before you send them opt-in requests or marketing information.

# Contacts

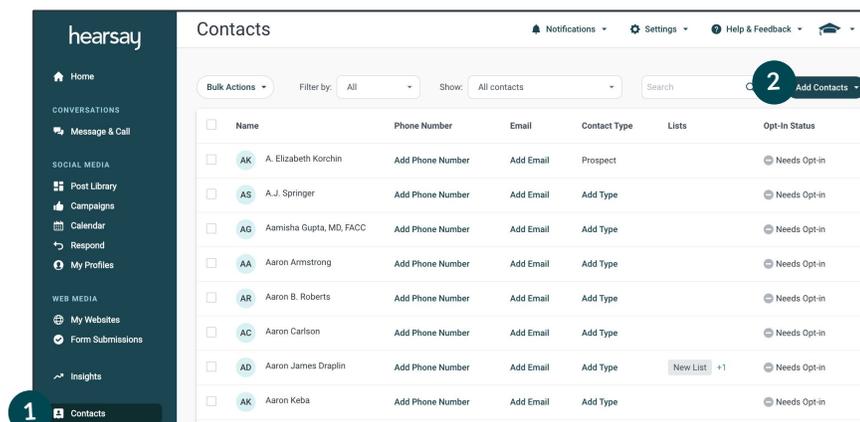
## Manage Your Hearsay Contacts

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

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

### To add a contact, simply follow these steps:

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



**Add Contact** 3

Engagement Information \* Indicates required fields

**Contact Type**  
None

**Language Preference** Preferred Channel  
None

**Personal Information**

**First Name \*** **Last Name \***

Preferred Name

**Birthday**  
Month Day Year  
MM / DD / YYYY

**Contact Information**

**Phone Number**  
Mobile (###) ###-####

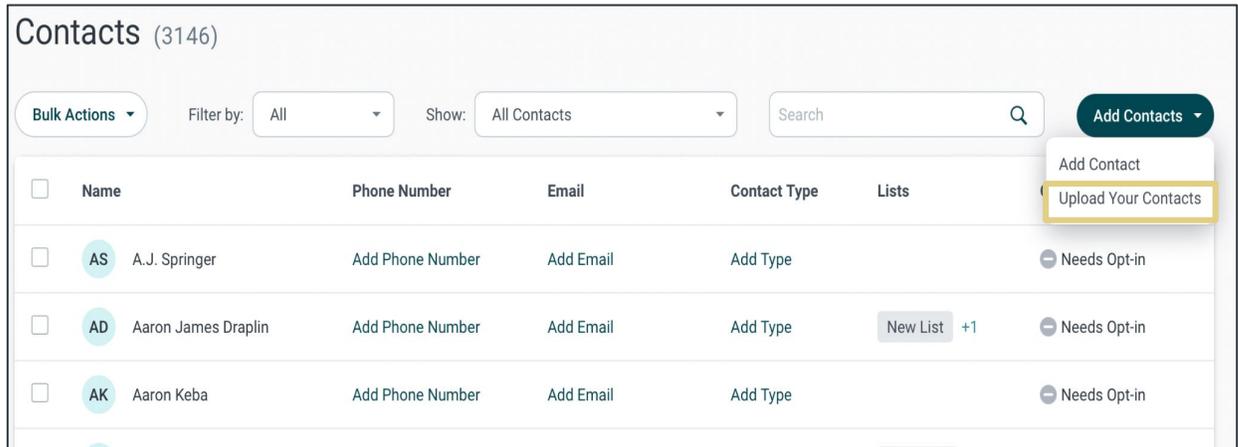
**Email Address**

Add Contact Cancel Help

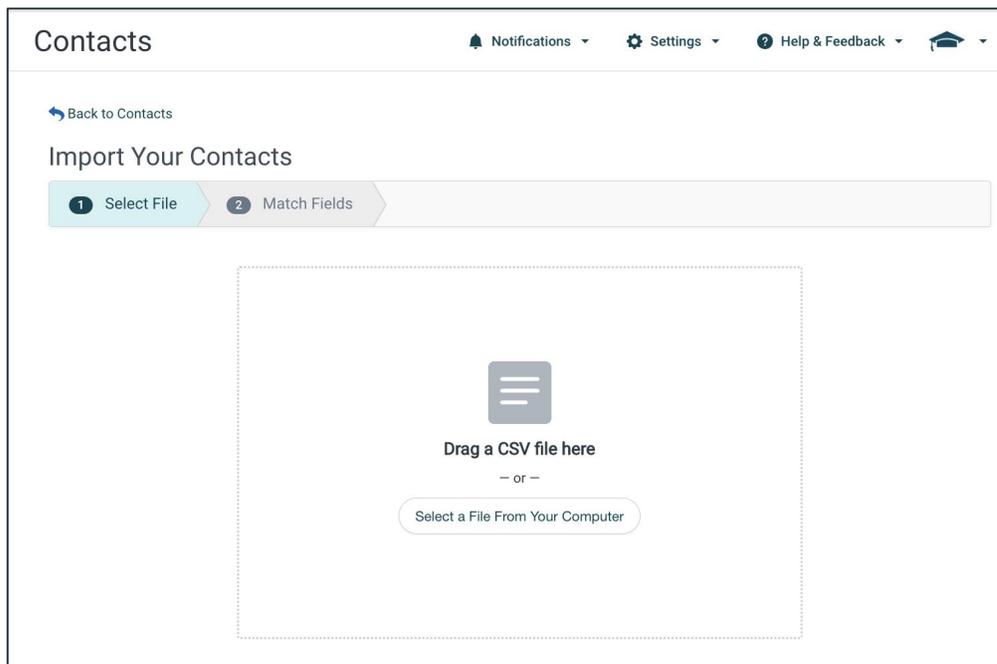
## Add Contacts in Bulk

To add contacts in bulk, simply follow these steps:

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



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



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

[Back to Contacts](#)

### Import Your Contacts

1 Select File 2 Match Fields

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

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

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

**Add to List (Optional)**

Select a List | New Contact List | Create

arrested development

Cancel **Submit**

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

**Contact Attestation**

By uploading this file, I attest to the following:

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

Cancel **I Attest**

→

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

**Contacts** (56)

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

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

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

## Search for Contacts

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

The screenshot shows the Hearsay interface. On the left is a dark sidebar with the 'hearsay' logo and navigation options: Home, CONVERSATIONS (Message & Call), SOCIAL MEDIA (Post Library, Campaigns, Calendar, Respond, My Profiles), WEB MEDIA (My Websites, Form Submissions), and Insights. The 'Contacts' tab is highlighted with a yellow box and a '1' callout. The main content area is titled 'Contacts' and includes a search bar with a '2' callout. Below the search bar is a table of contacts with columns: Name, Phone Number, Email, Contact Type, Lists, and Opt-In Status. A yellow box highlights the 'Opt-In Status' column for a contact, which has opened a menu of action icons (3). The icons are: a pencil (Edit Contact), a speech bubble (New Message\*), a clock (Schedule a Message\*), and a list icon (Add to List).

Name	Phone Number	Email	Contact Type	Lists	Opt-In Status
AK A. Elizabeth Korchin	Add Phone Number	Add Email	Prospect		Needs Opt-in
AS A.J. Springer	Add Phone Number	Add Email	Add Type		Needs Opt-in
AG Aamisha Gupta, MD, FACC	Add Phone Number	Add Email	Add Type		
AA Aaron Armstrong	Add Phone Number	Add Email	Add Type		
AR Aaron B. Roberts	Add Phone Number	Add Email	Add Type		
AC Aaron Carlson	Add Phone Number	Add Email	Add Type		Needs Opt-in
AD Aaron James Draplin	Add Phone Number	Add Email	Add Type	New List +1	Needs Opt-in
AK Aaron Keba	Add Phone Number	Add Email	Add Type		Needs Opt-in

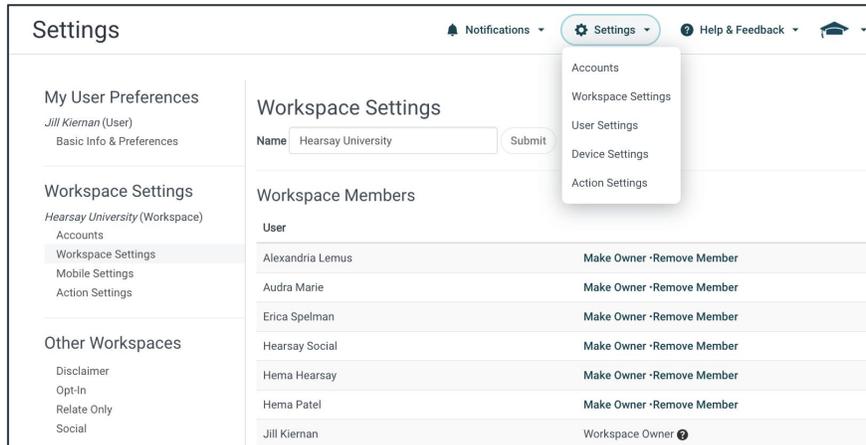
3. Hover over the Opt-In Status to show the Action icons and click on the desired action.

 Edit Contact
  New Message\*
  Schedule a Message\*
  Add to List

# Settings

## Workspace Settings

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



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

(screenshot on next page)

## Workspace Settings (continued)

**Settings**    Notifications    Settings    Help & Feedback

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

**Workspace Settings**  
 Hearsay University (Workspace)  
 Accounts  
**Workspace Settings** 1  
 Mobile Settings  
 Action Settings

**Other Workspaces**  
 Disclaimer  
 Opt-In  
 Relate Only  
 Social

**Workspace Settings**  
 Name: Hearsay University    Submit

**Workspace Members**

User	Workspace Owner
Alexandria Lemus	Workspace Owner ?
Audra Marie	Make Owner
Erica Spelman	Make Owner
Hearsay Social	Make Owner
Hema Hearsay	2 Make Owner
Hema Patel	Make Owner
Jill Kiernan	Make Owner
Josh Wein	Make Owner
Lexie Hearsay	Make Owner
Mike Skalandunas	Make Owner
Pradeep Ananthapadmanabhan	Make Owner
Sophie Gonzal	Make Owner

**Pending Workspace Members**

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

**4 Invite More Workspace Members**

Email:

Language:

Message:

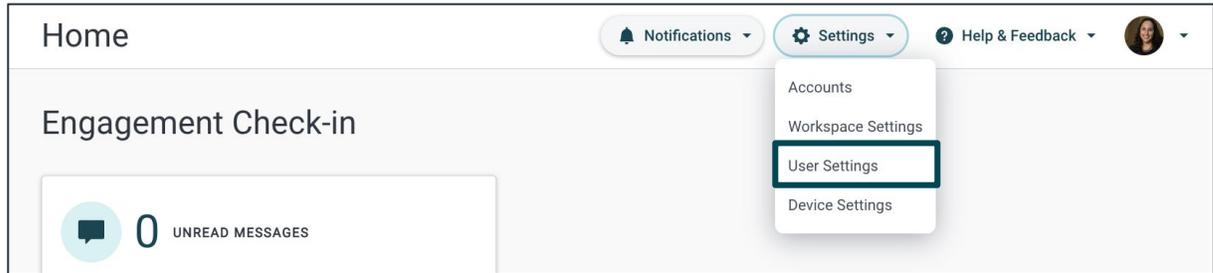
**Invite**

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

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

## User Settings

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



1. Adjust your local time zone. This is important to make sure your scheduled posts go out at the right time.
2. Change or update your email address in the Email Address text box. Hearsay Relate notifications will be sent to this email address.  
**Note:** If you sign on to Hearsay using the LinkedIn or Facebook login method, your email in Hearsay will update automatically to the email you use to login to your social network. We recommend updating your email in Hearsay to your corporate email address so you can receive Hearsay notifications to that email.
3. You can opt-in or opt-out of email notifications by selecting “ON” or “OFF” from the Email Subscriptions dropdown.

