



Multi-Entity Batch User Guide

Altvia's Correspond Investor Edition enables you to effectively communicate with Investor Contacts by generating and delivering documents via email and ShareSecure for capital calls, distributions, tax documents, and general correspondence.

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Getting Started: Multi-Entity Batch

Object Glossary

- **Investor Contact:** An individual contact for a specific Investor.
- **Investor Correspondence Preference:** The object that Correspond Investor Edition uses to determine who to deliver to and how. A child of the Investor Contact object, the delivery types directly tie to Investor Correspondence Batch record types and are marked true/false for each investor contact per type, ultimately determining how to deliver a batch of any particular type.
- **Investor Correspondence Batch:** A blast (via email and/or ShareSecure) of an investor correspondence (i.e. Capital Calls) sent to investors for a particular Entity.
- **Investor Correspondence:** Represents a delivery to all recipients to a single Investor. Any information you would like to merge into documents you create via Correspond Investor Edition must exist on this object.

Sending a Batch

Prerequisites for Sending a Batch

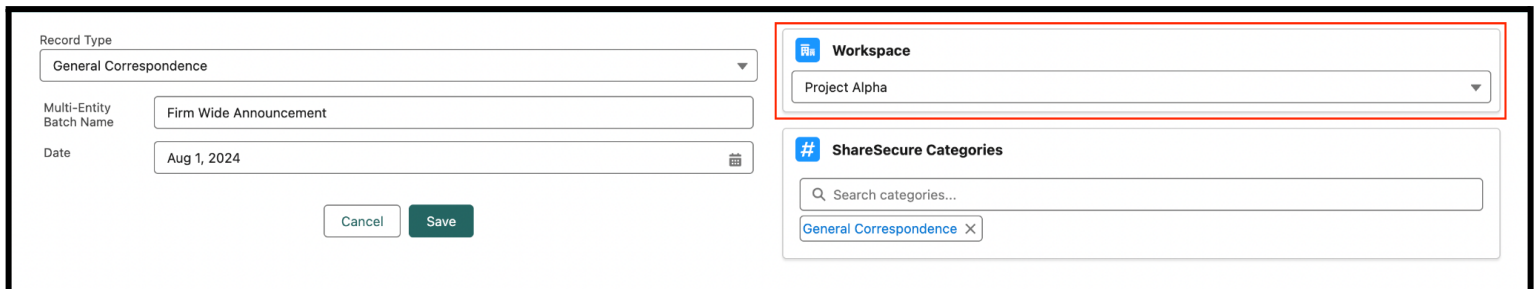
To send a Multi-Entity Batch, you'll need to ensure that the following conditions have been met. Please don't hesitate to [reach out to the Altvia Care team](#) if you're unsure about any of them:

- You have an Entity with Investors, Investor Contacts, and Investor Correspondence Preferences.
- ShareSecure and Correspond Investor Edition have been configured in AIM CRM.
- For ShareSecure deliveries: The user who will be preparing and sending your Investor Correspondence Batch is a ShareSecure administrator whose API key has been correctly configured within AIM CRM and has permission to publish documents in ShareSecure.

Batch Details and Categories

Start the batch from the Investor Correspondence Tab within AIM, under the 'Multi-Entity Batch' section.

- Fill out batch details: Select the appropriate Multi-Entity Batch type, and enter information related to the batch.
 - *If you have multiple ShareSecure Workspaces, select the relevant workspace to send the Multi-Entity Batch to, this will impact the ShareSecure delivery statistics depending on which workspace is selected.*



The screenshot shows the 'Multi-Entity Batch' creation interface. On the left, there are three input fields: 'Record Type' with a dropdown menu showing 'General Correspondence', 'Multi-Entity Batch Name' with the text 'Firm Wide Announcement', and 'Date' with a calendar icon and the date 'Aug 1, 2024'. Below these fields are 'Cancel' and 'Save' buttons. On the right, there is a 'Workspace' section with a dropdown menu showing 'Project Alpha', and a 'ShareSecure Categories' section with a search bar and a tag labeled 'General Correspondence'.

- **Add ShareSecure Categories:** Before pressing save, add any ShareSecure categories you would like to have applied to all documents in this batch. You can tag the batch either with existing ShareSecure categories, or you can create new ones.

- Reminder: the Batch Name and Batch Type will automatically be added as categories for all documents in a batch, so no need to enter those manually.

Select Recipients

The next step of the Multi-Entity batch creation process will require the input of Entities that should be included within the batch, using the *Add Entities* lookup component. Once all desired Entity records have been added, using the *Generate Recipients* button will create recipients for the Multi-Entity Batch.

Add Entities

Generate Recipients

Maple Partners VIII, L.P. X Maple Partners X, L.P. X

- Recipients with Correspondence: Any recipient that has an Investor Contact tied to an Investor that is associated with one of the Entity records selected. At least one of the potential many Investor Contacts related to one Recipient needs to have ShareSecure or Email preferences for the selected Correspondence Type of the Multi-Entity Batch.
- Recipients without Correspondence: Any recipient whose Investor Contact(s) do not have ShareSecure or Email selected for the selected Correspondence Type of the Multi-Entity Batch.

Add Entities

Generate Recipients

Maple Partners X, L.P. X Maple Partners VIII, L.P. X

Correspondence Type: General Correspondence

Save and Continue

Recipients With Correspondence Recipients Without Correspondence

Showing 1-4 of 4 records.

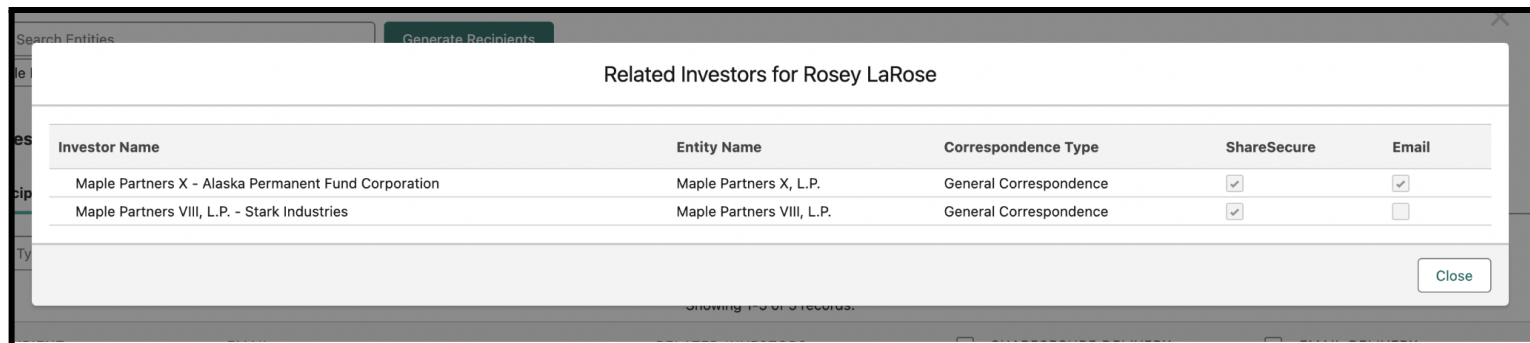
RECIPIENT	EMAIL	RELATED INVESTORS	☒ SHARESECURE DELIVERY	☒ EMAIL DELIVERY
Cole Maltese	cole+test1@altvia.com	View Investors	☒	☒
Finn Iijas	jeff.ijias+finn@altvia.com	View Investors	☒	☒
Hannah Test User	hannah+mpv2@altvia.com	View Investors	☒	☒
Rosey LaRose	demos+rosey@altvia.com	View Investors	☒	☒

Showing 1-4 of 4 records.

Recipients and their respective delivery methods can be updated directly within the table for the Multi-Entity Batch. Ensure that after you adjust any delivery methods that you press the *Save Changes* button!

****Note:** Updating delivery methods within the Multi-Entity Batch workflow does not update any Preferences on underlying Investor Contacts & Preferences. The updates are being made for the current batch and nothing else.

Within the Recipients table for each Recipient, there is an option to view the related Investors, this provides clarity on why a specific recipient was pulled into the batch and how delivery methods were decided upon.



Investor Name	Entity Name	Correspondence Type	ShareSecure	Email
Maple Partners X - Alaska Permanent Fund Corporation	Maple Partners X, L.P.	General Correspondence	☒	☒
Maple Partners VIII, L.P. - Stark Industries	Maple Partners VIII, L.P.	General Correspondence	☒	☐

Showing 1 of 1 records.

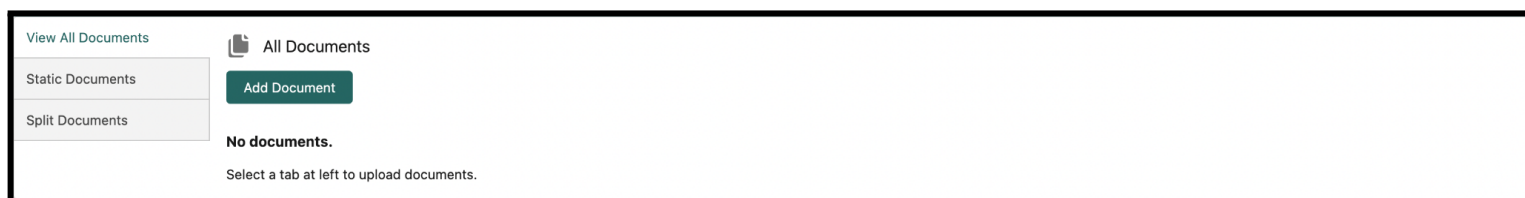
Close

Manage Documents

There are two document types that can be used with Multi-Entity Batches, including static documents and split documents. A description of a static document can be found below:

- **Static Documents:** Static documents are documents that do not contain any information that varies among Recipients, so each Recipient will receive the same document containing the same text. Examples include quarterly and annual reports, schedules, exhibits, memos, etc. Static documents will be uploaded from a user's local machine.
- **Split Documents:** Correspond Investor Edition's document splitting functionality consists of two main splitting options.
 - **Single Split Document:** Separates one PDF document into multiple PDF documents, by assigning different sections of the original file to different recipients by Investor using delimiters and merge keys. The maximum file size for a single PDF document to be split is 200 MB.
 - **Match Existing Documents:** Separates one ZIP file containing many documents and assigns each document to the correct recipients by Investor within the batch using delimiters and merge keys that are found within the filename.

You can upload documents either by navigating to their individual tabs or using the *Add Document* button on the **View All Documents** tab.



Static Documents

Static documents will be shared with all batch recipients (unless you manually remove them from certain recipients). You can customize the Document Name when you're uploading the document from your machine as well as having the option to categorize the document as "Read Only" within ShareSecure once it is delivered to ShareSecure. Additionally, you can assign specific ShareSecure categories that will be applied only to this document within the batch.

If you'd like to watermark your static document, you can also do so by selecting from your watermark templates.



Add Static Documents

Choose file

Upload File or Drop File

 **Document Options**

Document Name ?

☐ Make Document(s) Read Only in ShareSecure ?

Watermark Template
Choose a PDF document to enable watermarking.

 **ShareSecure Categories** ?

Upload

Split Documents

Single Split Document

Before You Split: Document Formatting

Multi-Entity Batches within Correspond: Investor Edition is capable of ingesting a single document and using identifiers within any pdf document to split pages out, create multiple documents, and match the resulting documents to corresponding investors & relevant recipients for distribution. It does so by reading special codes embedded on the pages of the source document, and by matching those codes to their corresponding investors, it can then assign out documents to the correct recipients based on the relationships to those Investors found within AIM CRM. To ensure accurate matching, it is important to properly format the codes used to identify which page(s) correspond to which investor(s).

Creating Proper Split Codes

Properly-formed split codes are made up of the following three parts:

- **Delimiter Start:** tells Correspond Investor Edition to begin looking for a matching ID.
- **Match ID:** a unique identifier used to match pages that are split to the corresponding Investor. This ID is **case-sensitive**. We recommend using a tax ID or Salesforce Investor ID.
- **Delimiter End:** tells Correspond Investor Edition to stop looking for a matching ID.



An example of a well-formed split code is as follows:

<aimstart>A0JI00000010IEREA2<aimend>

Delimiter Start

Match Id

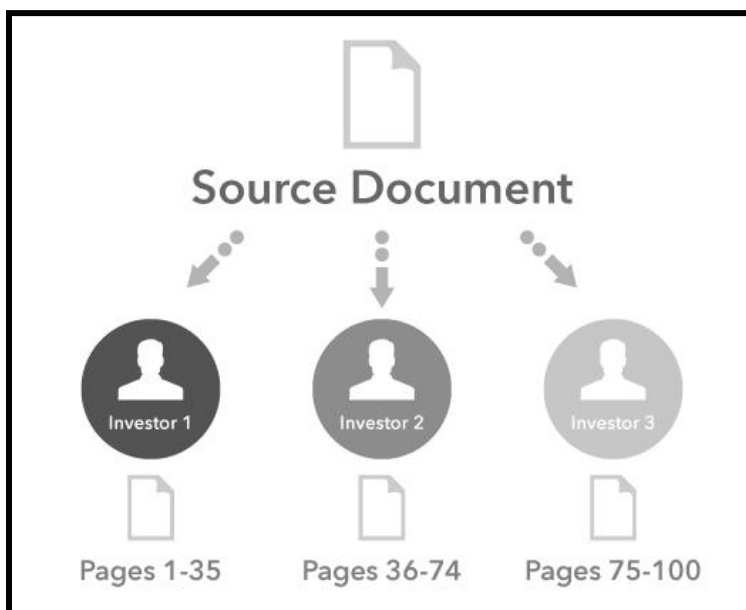
Delimiter End

In this example, upon seeing <aimstart>, Correspond: Investor Edition is instructed to begin looking for a Match ID, and it knows when that Match ID ends by reading <aimend>. It will then attempt to find an investor whose ID is, for example, A0JI00000010IEREA2. Be sure that the code does not contain spaces as delimiters should be continuous. While Correspond Investor Edition is capable of using any delimiter, <aimstart> and <aimend> are the preferred defaults. If not using these defaults, be sure to use delimiters that do not appear anywhere else in the content of the document.

Split Code Placement

Correspond Investor Edition is capable of splitting a source document that produces multiple pages per investor, even if each investor's resulting document is of differing lengths. In other words, a source document that contains 100 pages can be properly split to produce 35 pages for one investor, 40 pages for another investor, and 25 pages for a third investor.

Split codes should be placed only on the first page that corresponds to the page(s) in the source document that will be split for each investor. In our 100-page document, Investor 1's ID will be found on page 1, Investor 2's ID will be found on page 36, and Investor 3's ID will be found on page 75. The application knows -- by seeing Investor 2's ID on Page 36 -- that every page from 1 (where it last saw a Match ID) to Page 35 (one page short of the next Match ID it finds) belongs to Investor 1.



Split codes can be placed anywhere on the page, and – if desired – may be hidden by formatting them in white text. See the following example of a well-formed, properly-placed split code on the first page of an investor's K-1 file.



The image shows a sample Schedule K-1 (Form 1065) for the year 2013. A speech bubble at the top points to the header area, containing the split code: `<aimstart>A0JI00000010IEREA2<aimend>`. The form is filled out with sample data for 'REXAMPLE INVESTOR HOLDINGS, L.P.' and 'REXAMPLE PARTNERSHIP, L.P.'. The form includes sections for 'Part I Information About the Partnership', 'Part II Information About the Partner', and 'Part III Partner's Share of Current Year Income, Deductions, Credits, and Other Items'. The form is titled 'Schedule K-1 (Form 1065) 2013' and 'OMB No. 1545-0045'.

Splitting Your Document with Multi-Entity Batches in Correspond Investor Edition

After uploading your properly formatted file, you'll need to fill in a few key pieces of information

- **Select relevant Entity:** From the dropdown at the top, you must select a relevant Entity record that has been added to the Multi-Entity Batch in order to perform a split. This gives us the context as to which Entity, Investor, and Investor Contacts to use in order to assign the resulting documents to the correct recipients.
- **Delimiter Start:** Indicate the delimiter start you've used in your document. Correspond Investor Edition will default to `<aimstart>`, so we recommend using that if possible.
- **Delimiter Merge Key:** Choose the field you've used for the Match ID in your document. Once you select a field, Correspond Investor Edition will remember your Merge Key for future batches.
- **Delimiter End:** Indicate the delimiter end you've used in your document. Correspond Investor Edition will default to `<aimend>`, so we recommend using that if possible.
- **Document Name:** If you'd like to rename the document you've uploaded, here's the place to do so.
- **Append Investor Legal Name to File Name:** This checkbox defaults to true, and, if you leave it checked, each Investor's legal name will be appended to the root document name you've chosen in the field above.



- **Make Document(s) Read Only in ShareSecure:** This option allows users to categorize the document(s) as “Read Only” within ShareSecure once it is delivered to ShareSecure.
- **ShareSecure Categories:** You can assign ShareSecure categories that will be applied only to the documents created from splitting the document you uploaded.

Add a Split Document

* Select Entity

OMPEI

Choose file

Upload File

or Drop File

* Delimiter Start

<aimstart>

* Delimiter End

<aimend>

Delimiter Merge Key

Investor Legal Name

Delimiter Values and Merge Key For Splitting ⓘ

<aimstart>AIMInvOps__Investor_Legal_Name__c<aimend>

Document Options

Document Name ⓘ

☒ Append investor legal name to file name

☐ Make Document(s) Read Only in ShareSecure ⓘ

ShareSecure Categories ⓘ

Search categories...

Split

Match Existing Documents

Multi-Entity Batches within Correspond Investor Edition is capable of ingesting a ZIP file with many documents and assigning documents to the corresponding recipients related to specific Investors for distribution. It does so by reading a specified Match ID held within AIM CRM within the document name established within the upload process. This functions very similar to the Single Split Document process, as opposed to splitting out one single document into many documents, it splits out one ZIP file that contains many documents and assigns them accordingly.

- This feature supports common file types including pdf, docx, and xlsx. However, this is not an exhaustive list of what file types it supports.
- Multiple files of the same or different type being assigned to the same Investor is supported.
- A desired Match ID can be configured in AIM CRM with the help of the Altvia Care team on the Investor Contact Object.

Zip Formatting



- Files should be compressed into a folder and have the zip file extension
- Files within the zip should be no more than 10MB in size per file
- Files within the zip should be of the same entity.
- Files within the zip can be multiple file types including pdf, docx, and xlsx files
- Files within the zip should have a consistent filename structure.

Filename Structure

- Filenames should be formatted to always include a desired Match ID that is found within AIM CRM.
- Match IDs should NOT contain a character that is also chosen as a delimiter
- Filenames should be consistent within the zip folder.
- Filenames should be unique in the sense that they contain the Match ID chosen. More than one file with the same name is allowed and will be assigned to the same Investor based on Match ID.

Upload a zip file to match the files within

Select Entity

OMPEI

Choose file

Upload Zip File

or Drop Zip File

Delimiter Start (optional) ⓘ

Delimiter End (optional)

Delimiter Match ID

Investor Legal Name

Field to be Matched ⓘ

AIMInvOps__Investor_Legal_Name__c

Document Options

Rename Files ⓘ

☒ Append investor legal name to file name

☒ Remove Delimiters and Match ID from file name

☐ Make Document(s) Read Only in ShareSecure ⓘ

ShareSecure Categories ⓘ

Search categories...

Match

Creating Proper Delimiter Codes

Properly-formed Delimiter (matching) codes are made up of three parts: Delimiter Start, Delimiter End, and Delimiter Match ID. Delimiters are optional. If both delimiter fields are left blank the tool will assume that the Match ID is the entire filename.



Delimiter Start (optional):

- Tells Correspond Investor Edition to begin looking for the chosen Match ID.
- If the Delimiter Start field is left blank and the Delimiter End field is filled in, it is assumed the filename STARTS within the Match ID as the first text in the filename and ends where the Delimiter End field is found.

Example: In this example, the tool will immediately start looking for "State Retirement System" in the filename and then stop reading the filename when it finds "-"

- Delimiter Start: Blank/Empty
- Delimiter End: - (DASH)
- Delimiter Match ID: Investor Name
- Filename within Zip: State Retirement System-Tax Document.pdf

Choose file

or Drop Zip File

Delimiter Start (optional) ⓘ

Delimiter End (optional)

Delimiter Match ID

▼

Field to be Matched ⓘ

AIMInvOps__Investor_Name__c-

Delimiter End (optional):

- Tells Correspond Investor Edition to stop looking for a Match ID.
- If the Delimiter End field is left blank and Delimiter Start field is filled in, it is assumed the Match ID begins where the start delimiter is found and ENDS with the last text in the filename.

Example: In this example, the tool will start looking for "State Retirement System" in the filename and when it finds the first instance of "-" it will ignore everything before it.

- Delimiter Start: - (DASH)
- Delimiter End: Blank/Empty
- Delimiter Match ID: Investor Name
- Filename within the Zip: 2023_K1-State Retirement System.pdf



Choose file

Upload Zip File
or Drop Zip File

Delimiter Start (optional) ⓘ

-

Delimiter End (optional)

Delimiter Match ID

Investor Name ▼

Field to be Matched ⓘ

-AIMInvOps__Investor_Name__c

Using both Start and End Delimiters:

- Tells Correspond Investor Edition that the Match ID is between the start and end chosen delimiters.

Example: In this example, the tool will read the file name to find the first instance of the "-" and then expect the Match ID followed by the second instance of "-".

- Delimiter Start: - (DASH)
- Delimiter End: - (DASH)
- Delimiter Match ID: Investor Name
- Filename within Zip: 2023-State Retirement System-K1.pdf

Choose file

Upload Zip File
or Drop Zip File

Delimiter Start (optional) ⓘ

-

Delimiter End (optional)

-

Delimiter Match ID

Investor Name ▼

Field to be Matched ⓘ

-AIMInvOps__Investor_Name__c-

Delimiter Match ID (Required):

- A unique identifier is used to match filenames within the Zip to the corresponding Investor.



- This drop-down is populated by the Investor Correspondence object and can be configured as desired.
- This ID is **case-sensitive**.
- We recommend using a Tax ID, Salesforce Investor ID, or anything else that may be unique to an individual Investor.

Splitting Your Zip File in Correspond Investor Edition

- **Select relevant Entity:** From the dropdown at the top, you must select a relevant Entity record that has been added to the Multi-Entity Batch in order to perform a split. This gives us the context as to which Entity, Investor, and Investor Contacts to use in order to assign the resulting documents to the correct recipients.
- **Rename Files:** Entering a name into this field will rename each file as desired. You may leave this field blank, if you do so, each file within the Zip will retain its original filename.
- **Append Investor Legal Name to file name:** This box is checked by default. Leaving it checked will append the Investor Legal Name stored within AIM CRM to the end of any filename regardless of whether or not you choose to rename the file. Uncheck this box if you DO NOT want to append the Investor's legal name to the filename.
- **Remove Delimiters and Match ID from filename:** This box is checked by default and will remove the chosen delimiters and Match ID from the filename, while leaving everything else from the existing filename. Uncheck this box to leave the name as is. If you choose to rename the file then this option will become unavailable.
- **Make Document(s) Read Only in ShareSecure:** This option allows users to categorize the document(s) as "Read Only" within ShareSecure once it is delivered to ShareSecure.
- **ShareSecure Categories:** You can assign ShareSecure categories that will be applied only to the documents created from splitting the Zip file you uploaded.

One-Off Recipient-Specific Documents

If you ever need to add a one-off document for a specific Recipient – for example, if a particular Recipient needs additional information provided in a batch due to a side letter – you can upload it in the table in the bottom half of this page. Simply locate the recipient and use the *+ Add Document* option to upload the document.

Preview Documents

Remove All Documents

Save and Continue

Showing 1-5 of 5 records.

Recipient	Email	Document	Document Type	Categories	
Cole Maltese (+ Add Document)	cole+test1@altvia.com	Document 1.pdf	Static	General Correspondence	
Finn Iijas (+ Add Document)	jeff.ijias+finn@altvia.com	Document 1.pdf	Static	General Correspondence	
Hannah Test User (+ Add Document)	hannah+mpv2@altvia.com	Document 1.pdf	Static	General Correspondence	
Rosey LaRose (+ Add Document)	demos+rosey@altvia.com	Document 1.pdf	Static	General Correspondence	
Theresa Walker (+ Add Document)	demos+theresawalker@altvia.com	Document 1.pdf	Static	General Correspondence	

Showing 1-5 of 5 records.

Compose Email

During this step of the Multi-Entity Batch process, you'll indicate whether you'd like to send a direct email as part of your batch.

Workspace: Project Alpha Firm Wide Announcement

✓ ✓ ✓ Compose Email Review

Send Email? ☒ Yes

From Address
admin.maplepeakdemo@altvia.com

Template
None Selected
Manage Email Templates

Email Body Merge Fields *i*
Select merge field Copy and paste into editor

Subject *i*

Salesforce Sans 12 B I U

If you'd like to send an email, you'll be required to fill in a subject and body. You can use merge fields in both the subject and body, and we've provided you dropdowns you can use to copy-paste the exact text you'll need to use, there are two types of merge fields:

Template
None Selected
Manage Email Templates

Email Body Merge Fields *i*
Select merge field Copy and paste into editor

Correspond: Investor Edition allows users to create Email Templates that can be reused across Multi-Entity Batches, if you would like to manage these email templates, press the *Manage Email Templates* button and you will be redirected to a new page that will display all current email templates with options to create new templates, edit existing ones, or delete existing email templates.

Email Templates Create Email Template

Template Type
Multi-Entity Batch

	Name	Subject
Edit Delete	General Notification	General Notification from Maple Partners

After you've composed your email, there are a few more choices available:

- **Send Documents as Attachments?:** This checkbox will default to true. If you deselect this option,



none of the documents generated or uploaded in the previous steps will be attached to direct emails that the recipients receive.

- **Send Email to Recipients without Documents?:** This checkbox will default to true, if you deselect this option, any recipient without an associated document on the direct email will **NOT** be sent an email from this batch.
- **BCC Address:** Users can input email address(es) into this field, and those email addresses will receive a copy of each email that is sent from the batch. Multiple emails may be input here as long as they are comma-separated.

Finally, you'll be able to choose a preset signature to append to the end of the email. Clicking the *Manage Signatures* button will allow you to add a new signature or designate a different primary signature. If the current instance of Correspond Investor Edition is connected to multiple ShareSecure Workspaces, a *Select Workspace* dropdown will appear. Signatures are Workspace-specific, meaning there are separate sets of signatures per ShareSecure Workspace.

If you would **not** like to send an email, simply set the toggle on top of the page to the No setting. Do note that anytime a document is shared with a user via ShareSecure, s/he will receive a separate email from ShareSecure (unless notifications have been paused or disabled in ShareSecure or the user opted not to receive notifications from ShareSecure).

Workspace: Project Alpha Firm Wide Announcement

Progress: [Step 1] [Step 2] [Step 3] [Step 4: Compose Email] [Review]

Send Email? ☐ No

Reviewing a Batch, Sending Drafts, and Delivering

Review Batch Data

We've provided a few tabs to help you make sure that everyone who's supposed to be receiving this batch is going to get the correct materials:

- **Recipients Receiving Correspondence:** This tab displays all recipients who will receive your batch. The table displays all recipient names & emails, the documents they'll receive, which categories those documents will be assigned, and delivery method(s). Additionally, you can preview emails that recipients with email correspondence preferences will receive.

Recipients Receiving Correspondence Recipients Without Correspondence Recipients Missing Delivery Info					
Search recipients...					
Recipient	Document Type	Document	Categories	Delivery Methods	
Cole Maltese (cole+test1@altvia.com)	Static	Document 1.pdf	General Correspondence	Email, Sharesecure	Preview Email
Finn Iijas (jeff.ijias+finn@altvia.com)	Static	Document 1.pdf	General Correspondence	Email, Sharesecure	Preview Email
Hannah Test User (hannah+mpv2@altvia.com)	Static	Document 1.pdf	General Correspondence	Email, Sharesecure	Preview Email
Rosey LaRose (demos+rosey@altvia.com)	Static	Document 1.pdf	General Correspondence	Email, Sharesecure	Preview Email
Theresa Walker (demos+theresawalker@altvia.com)	Static	Document 1.pdf	General Correspondence	Email, Sharesecure	Preview Email

- **Recipients Without Correspondence:** These are Recipients that will not be receiving correspondence from this batch. This could be caused by Investor Contacts without Correspondence Preferences for your selected batch type or by the Recipients having been manually unchecked on the Select Recipients tab.

Fund I Capital Call - November 2023

Refresh Recipient Data

✓

✓

✓

✓

Review

Send Drafts to ShareSecure

Confirm & Deliver

Correspondence Details

Name

Fund I Capital Call - November 2023

Correspondence Type

Investor Correspondence Batch

Created At

11/17/2023, 11:33:09 AM

Status

Unsent

Total Amount

\$15,400,000.00

Investors

1

Individual Recipients

2

Documents

1

Categories

Capital Call, Fund I Capital Call - November 2023

What do these tabs mean?

Investors Receiving Correspondence

Investors Who Won't Receive Correspondence

Q Search recipients...

PGA Capital Partners - Fund I — \$2,000,000.00 — No Recipients

State University Endowment - Fund I — \$2,400,000.00 — No Recipients

UTIMCO - Fund I — \$6,000,000.00 — No Recipients

- **Email Recipients Missing Email Address:** Recipients who appear in this tab have Correspondence Preferences to receive your message via email, but they're missing an email address. (This tab does not appear unless you have chosen to send an email and have email recipients without an email address.)

Send Drafts to ShareSecure

Pressing the *Send Drafts to ShareSecure* button will deliver all ShareSecure deliveries in a draft state, meaning that your recipients will not be able to see them (draft documents in ShareSecure are visible only to admins).

Workspace: Project Alpha

Firm Wide Announcement

✓

✓

✓

✓

Review

Send Drafts to ShareSecure

Confirm & Deliver

Correspondence Details

Name

Firm Wide Announcement

Correspondence Type

Multi-Entity Batch

Created At

8/1/2024, 1:30:34 PM

Status

Unsent

Individual Recipients

5

Documents

1

Categories

General Correspondence

Once you send your deliveries to ShareSecure as drafts, you can do a final spot check on documents, recipients, and categories directly in ShareSecure before you officially share them. If you notice a problem with your drafts, you can remove them from ShareSecure, make modifications, and re-draft them.

Workspace: Project Alpha Firm Wide Announcement

Review

Remove Drafts from ShareSecure View In ShareSecure Confirm & Deliver

Correspondence Details

Name	Firm Wide Announcement	Individual Recipients	5
Correspondence Type	Multi-Entity Batch	Documents	1
Created At	8/1/2024, 1:30:34 PM	Categories	General Correspondence
Status	Drafts sent		

Confirm & Deliver

Once you're ready to send your batch, click this button!

Workspace: Project Alpha Firm Wide Announcement

Review

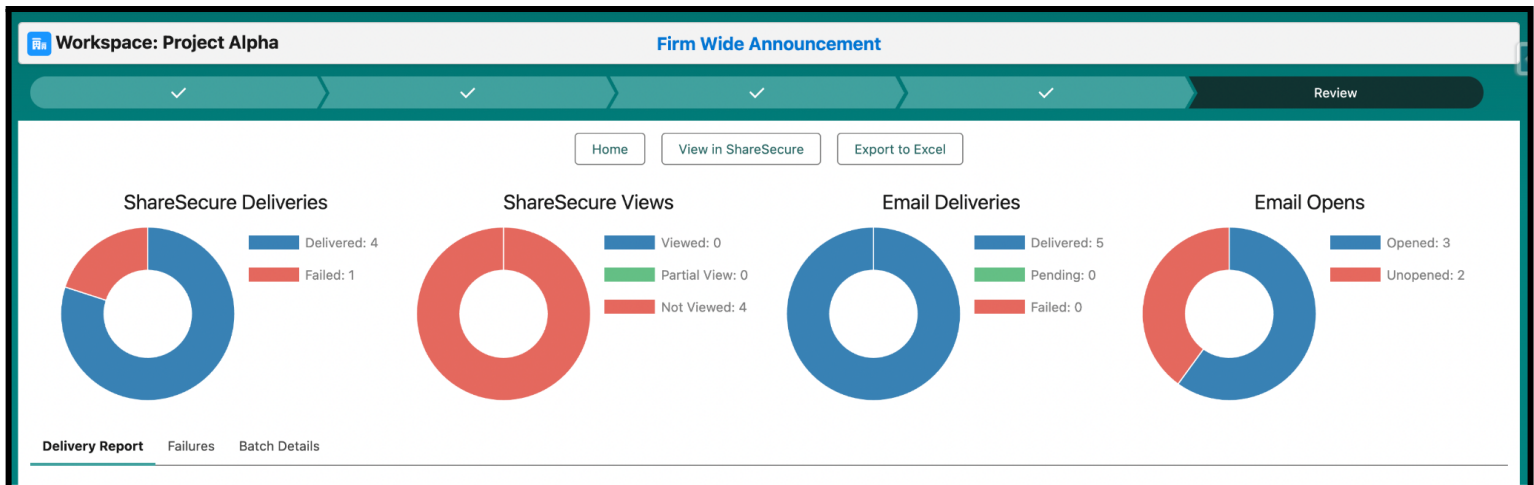
Remove Drafts from ShareSecure View In ShareSecure Confirm & Deliver

Correspondence Details

Name	Firm Wide Announcement	Individual Recipients	5
Correspondence Type	Multi-Entity Batch	Documents	1
Created At	8/1/2024, 1:30:34 PM	Categories	General Correspondence
Status	Drafts sent		

Using the Delivery Report

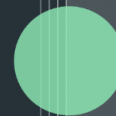
Once your batch has started making its way out to recipients, you'll be redirected to a delivery report.



You can use the charts at the top of the page to filter down to subsets of recipients. For each delivery, you'll be able to either view documents in ShareSecure or the email you've sent.

If any of your deliveries have failed, navigate to the Failures tab to figure out what happened, make the modifications we suggest, and retry delivery.

If you would like to export the delivery results to Excel, simply use the *Export to Excel* button found above the charts on this page.



Appendix

Frequently Asked Questions

How many recipients can be included in a single batch?

A single batch can include up to 5000 individual recipients.

Is there a limit to the number of Entities that can be added to a Multi-Entity Batch?

Not necessarily, it's more about the number of recipients (Investors Contacts) that are pulled in for each Entity and how that impacts the limit of 5000 individual recipients within the batch.

What's the largest static document I can send via Correspond Investor Edition?

100 MB for ShareSecure Only deliveries.

10 MB if the Batch includes a direct email being sent.

Can I send a Multi-Entity Batch without any documents attached?

Yes. Simply skip the Manage Documents screen as you run through the wizard steps.

Is there any impact to underlying Investor Contacts & Preferences by updating the Delivery Preferences within the Multi-Entity Batch?

No there is not, any updates that are made within the process of a Multi-Entity Batch will only impact that single batch and will not update the underlying correspondence preference data for a given recipient.

How are Correspondence Preferences handled within a Multi-Entity Batch?

Correspondence Preferences are "combined" across Investors Contact for a given recipient.

- Ex. Contact has Investor Contact 1 related to Entity A and Investor Contact 2 related to Entity B. Investor Contact 1 is set to receive General Correspondence via ShareSecure ONLY while Investor Contact 2 is set to receive General Correspondence via Email ONLY. This will result in the Recipient within the Multi-Entity Batch to have both ShareSecure & Email selected for delivery methods for a General Correspondence Multi-Entity Batch.

What if an Investor Contact has an override email set for a specific Entity record?

If a recipient has an override email set on one of their Investor Contacts, the email input in the Override Email field will be considered as a separate recipient within the Multi-Entity Batch for direct email purposes.

- For ShareSecure Deliveries, those will still be shared with the related ShareSecure user associated with the Contact record for the Investor Contact.