



# Correspond Investor Edition 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: Correspond Investor Edition

## 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.
- **Master Investor Contact (MIC):** A Contact associated with an Account, which can be used to quickly add, update, or deactivate Investor Contacts for that Account's Investor commitments found in AIM CRM.
- **Master Investor Correspondence Preference:** A standard set of preferences associated with a Master Investor Contact, which can be used to update preferences for Investor Contacts for that Account's Investor commitments.
- **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.
- **Investor Correspondence Delivery, Investor Correspondence Delivery Doc, Investor Correspondence Email Template, Investor Correspondence Static Doc:** Legacy objects that are no longer used by Correspond Investor Edition

## Investor Contacts

Investor Contacts are the individual recipients in an Investor Correspondence Batch and are grouped by the Investor they are assigned to. For example, if State Retirement System invested into your Entity, *Fund I*, and they requested that all documentation be sent to Carolina Webster, you would create one Investor Contact for the State Retirement System Investor commitment tied to Fund I.

The screenshot displays the 'Investor' interface for 'SRS - Fund I'. At the top, there are buttons for '+ Investor Contacts', '+ Interaction', 'Edit', 'Delete', 'Clone', and 'Add File'. Below this, a summary row shows: Account: State Retirement System, Entity: Fund I, Commitment: \$25,000,000.00, Pro rata (%): 32.47%, Last Interaction, and Last Interaction Date.

The main area is divided into 'Details' and 'Files & History'. The 'Details' section includes fields for Investor Name (SRS - Fund I), Investor Legal Name (State Retirement System), Entity (Fund I), Account (State Retirement System), and GP Member (unchecked). Below this is a 'Commitment Details' section with fields for Original Commitment (\$25,000,000.00), Commitment Date (11/17/2021), Commitment (\$25,000,000.00), and Pro rata (%) (32.47%).

On the right side, there is a section for 'Edit Correspondence Preferences' and a table for 'Investor Correspondence'. The table has columns for Network, Investor Correspondence, Transfers, and Tasks. A red box highlights the 'Investor Contacts (1)' section, which shows a single item: 'Carolina Webster - SRS - Fund I' with a 'Carolina Webster' contact name and a checked 'Primary' checkbox.

## Correspond Preferences

To control which types of Investor Correspondence Batches an Investor Contact will receive and whether they'll receive documents via ShareSecure or email or both, you'll need to fill out their Investor



Correspondence Preferences in the grid shown below. In this example, Carolina Webster would receive all types of Investor Correspondence Batches (Capital Call, Distribution Notice, and General Correspondence) via email and ShareSecure delivery.

**Investor Contact**  
**Carolina Webster - SRS - Fund I**

Contact: Carolina Webster    Investor: SRS - Fund I    Correspondence Email: cwebster@app-xdemo.com

**Correspondence Preferences**

CORRESPONDENCE TYPE	<input checked="" type="checkbox"/> SHARESECURE	<input checked="" type="checkbox"/> EMAIL	<input type="checkbox"/> FAX	<input type="checkbox"/> MAIL	<input type="checkbox"/> OTHER
Capital Call	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Distribution Notice	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
General Correspondence	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

[Clone Preferences](#)

The Clone Preferences action at the bottom of the Preferences grid allows you to apply the preferences for this Investor Contact to another Investor Contact, either new or existing.

### Overrides

By default, the email address for this Investor Contact will be the email address from its parent Contact record. If you would like to override that email address with a different one, you can do so on the Investor Contact record. The same applies to Address and Fax overrides.

### Mass Edit Correspondence Preferences

If you'd like to edit Preferences for all Investor Contacts related to either an Investor or a Contact on a single screen, click the *Edit Correspondence Preferences* button on either of those records to navigate to this screen:

**Edit Correspondence Preferences: Carolina Webster**

Correspondence Preferences - Bulk Update

Carolina Webster - SRS - Fund I (cwebster@app-xdemo.com)

**Correspondence Preferences**

CORRESPONDENCE TYPE	<input checked="" type="checkbox"/> SHARESECURE	<input checked="" type="checkbox"/> EMAIL	<input type="checkbox"/> FAX	<input type="checkbox"/> MAIL	<input type="checkbox"/> OTHER
Capital Call	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Distribution Notice	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
General Correspondence	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Carolina Webster - SRS - Fund II (cwebster@app-xdemo.com)

**Correspondence Preferences**

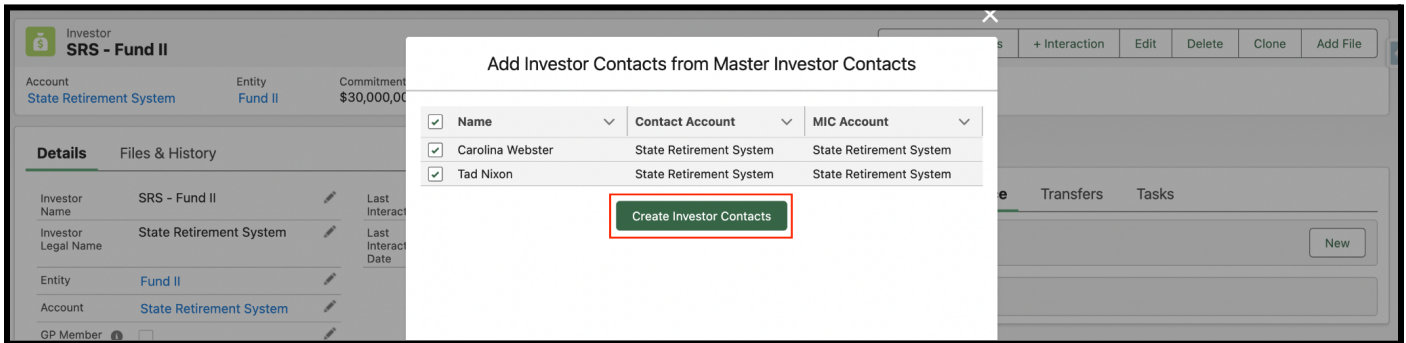
CORRESPONDENCE TYPE	<input checked="" type="checkbox"/> SHARESECURE	<input checked="" type="checkbox"/> EMAIL	<input type="checkbox"/> FAX	<input type="checkbox"/> MAIL	<input type="checkbox"/> OTHER
Capital Call	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Distribution Notice	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
General Correspondence	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

The bulk update button can be used to add delivery preferences in bulk to all underlying Investor Contact records.



## Master Investor Contacts

Master Investor Contacts (MICs) allow you to set up a standard set of Contacts for an Account that can quickly be added as Investor Contacts to that Account's Investor Commitments within AIM CRM. For example, if State Retirement System always wants Carolina Webster and Tad Nixon to receive Investor Correspondence, you could add them as MICs for that Account. Whenever you create a new Investor record, you can quickly add Carolina and Tad as Investor Contacts with the preferences that have been defined on the Master Investor Contacts created for each person.



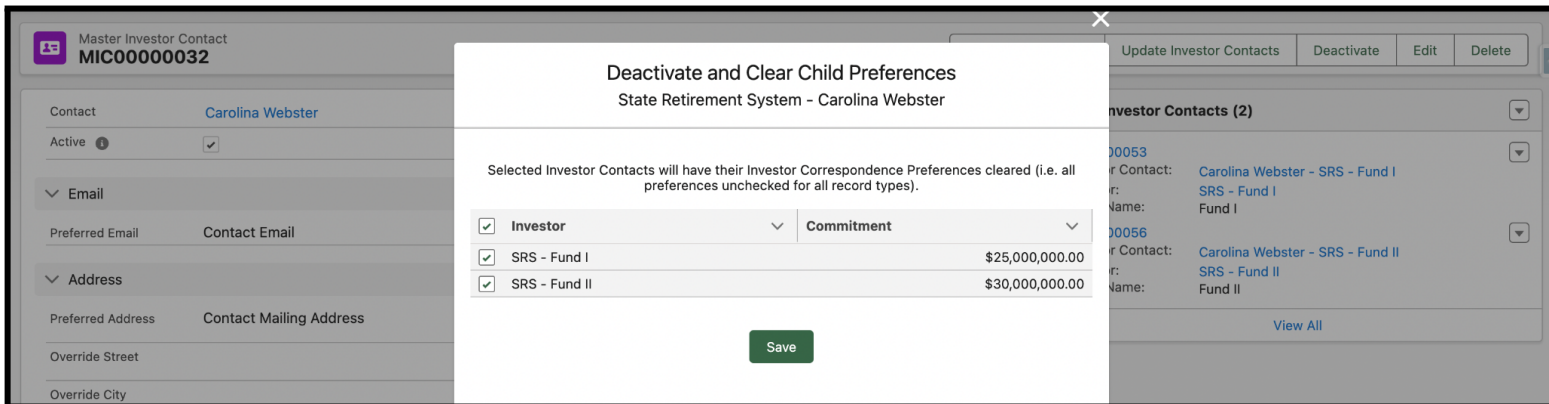
Additionally, if you create a new MIC, you can use the *+ Investor Contacts* button on MIC to create Investor Contacts related to that MIC in some/all of that Account's existing Investor Commitments.

## Updating Investor Contacts

If you make an update to an MIC – for example, tweaking delivery preferences – you can apply that change to all Investor Contacts related to the MIC by using the *Update Investor Contacts* button and selecting which Investor Contacts you'd like to apply that change to.

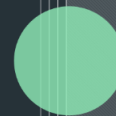
## Deactivating Investor Contacts

You can also use MICs to clear out preferences on all related Investor Contacts if that individual has left a firm or for any other reason should no longer receive Investor Correspondence. Simply press the *Deactivate* button and select all Investor Contacts where Preferences should be removed. Once you deactivate that MIC, its *Active* checkbox will be unchecked, and that MIC will no longer appear as an option when creating Investor Contacts through the *+ Investor Contacts* popup on Investor.



## Mass Editing Master Correspondence Preferences

In the same way you can edit Preferences for all Investor Contacts related to either an Investor or a Contact on a single screen, you can also edit Preferences for all MICs related to a single Account by



clicking the *Edit Master Preferences* button on Account. Additionally, you can update each MIC's Investor Contacts as you go using the *Update Investor Contacts* button associated with each grid.

**Edit Master Preferences: State Retirement System**

State Retirement System - Tad Nixon Update Investor Contacts

**Master Investor Contact Correspondence Preferences**

CORRESPONDENCE TYPE	<input checked="" type="checkbox"/> SHARESECURE	<input checked="" type="checkbox"/> EMAIL	<input type="checkbox"/> FAX	<input type="checkbox"/> MAIL	<input type="checkbox"/> OTHER
Capital Call	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Distribution Notice	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
General Correspondence	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

State Retirement System - Carolina Webster Update Investor Contacts

**Master Investor Contact Correspondence Preferences**

CORRESPONDENCE TYPE	<input checked="" type="checkbox"/> SHARESECURE	<input type="checkbox"/> EMAIL	<input type="checkbox"/> FAX	<input type="checkbox"/> MAIL	<input type="checkbox"/> OTHER
Capital Call	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Distribution Notice	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
General Correspondence	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## Sending a Batch

### Prerequisites for Sending a Batch

To send an Investor Correspondence 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.
- For document generation from a template: You've worked with Altvia to set up the templates from which you'll generate your investor-specific documents.

### Batch Details and Categories

You can start your batch from two places:

1. The Entity you'd like to send from
2. Or the Investor Correspondence tab



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

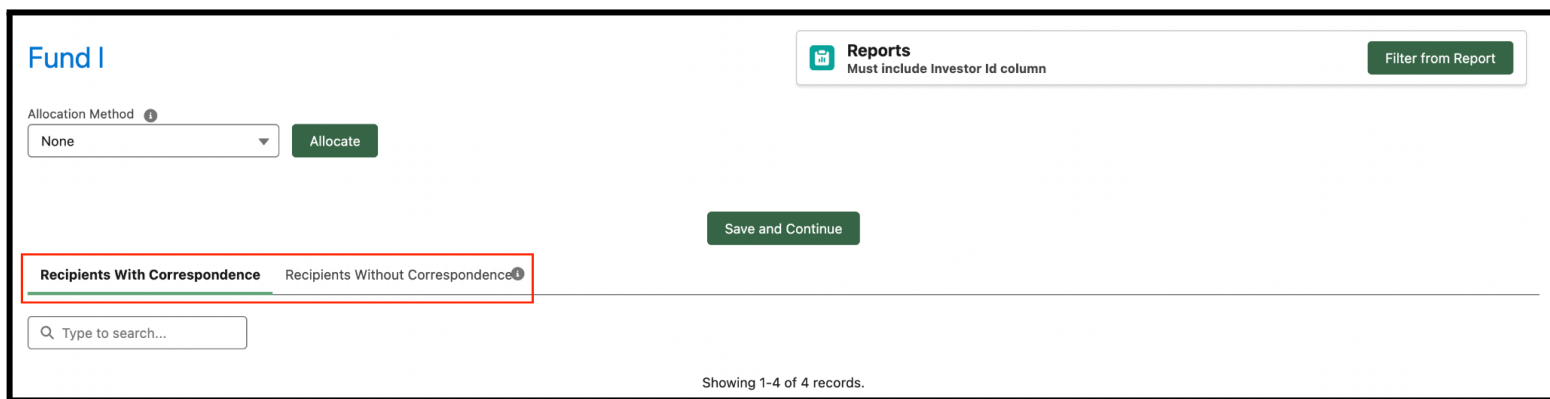
- Add ShareSecure Categories: Before pressing save, add any ShareSecure categories you would like to have applied to all documents in this batch. You can tag the batch either with existing ShareSecure categories, or you can create new ones.
  - Reminder: the Batch Name and Batch Type will automatically be added as categories for all documents in a batch, so no need to enter those manually.
  - If you would like additional categories to be added automatically to all documents in the batch, please [reach out to the Altvia Care team](#) to have those setup.



## Choose Recipients

The next step of the batch creation process will load with all Investors in your chosen Entity separated into two tabs:

- **Recipients with Correspondence:** Any Investors with a commitment amount greater than \$0 will load in this first tab. If you'd like to remove any investors from this batch, simply uncheck the *Send Correspondence?* checkbox and save your changes within the table.
- **Recipients without Correspondence:** We assume that you do not want to send correspondence to Investors who have transferred out of your fund, so any Investors with a commitment of \$0 will be excluded from the Investor Correspondence Batch by default. If you wish to include these Investors, navigate to the *Recipients without Correspondence* tab and check the *Send Correspondence?* checkbox and save the changes.



The screenshot shows the 'Fund I' interface. At the top left, there's a title 'Fund I'. Below it, an 'Allocation Method' dropdown is set to 'None', with an 'Allocate' button next to it. In the top right, there's a 'Reports' section with a sub-note 'Must include Investor Id column' and a 'Filter from Report' button. In the center, there's a 'Save and Continue' button. Below that, there are two tabs: 'Recipients With Correspondence' (which is highlighted with a red box) and 'Recipients Without Correspondence'. At the bottom left, there's a search bar with the placeholder text 'Type to search...'. At the bottom center, it says 'Showing 1-4 of 4 records.'

If you would like to allocate a capital call or distribution amount, you can do so using the *Allocation Method* dropdown. Your options are the following:

- **None:** Correspond Investor Edition defaults to this option, which means that no allocation happens and all amounts will remain \$0.
- **Pro Rata:** Each investor will be allocated their pro rata share of the total set amount you choose.
- **Percentage:** Each investor will be allocated a set percentage (chosen by you) of its total commitment.

After you've allocated, you can still adjust individual Investors' amounts in the table by using the *Adjusted Amount* column, just be sure to click the Save button within the table so that you don't lose your work.



Fund I

**Reports**  
Must include Investor Id column

Filter from Report

Allocation Method  ⓘ

▼
Percentage

Percentage Amount

20

Allocate

**Current Batch Amount** \$15,400,000.00

Save and Continue

Recipients With Correspondence

Recipients Without Correspondence ⓘ

🔍

Showing 1-4 of 4 records.

INVESTOR	RECIPIENTS	COMMITMENT	PRO RATA %	CURRENT AMOUNT	ADJUSTED AMOUNT	<input checked="" type="checkbox"/> <span style="font-size: 0.7em;"> SEND CORRESPONDENCE?</span>
PGA Capital Partners - Fund I		\$10,000,000.00	12.99%	\$2,000,000.00	2000000	<input checked="" type="checkbox"/>
SRS - Fund I	<a href="#">Carolina Webster</a> (cwebster@app-xdemo.com) <a href="#">Tad Nixon</a> (tnixon@app-xdemo.com)	\$25,000,000.00	32.47%	\$5,000,000.00	5000000	<input checked="" type="checkbox"/>
State University Endowment - Fund I		\$12,000,000.00	15.58%	\$2,400,000.00	2400000	<input checked="" type="checkbox"/>
UTIMCO - Fund I		\$30,000,000.00	38.96%	\$6,000,000.00	6000000	<input checked="" type="checkbox"/>

Finally, if you'd like to send an Investor Correspondence Batch to a subset of Investors in a particular Entity – for example, GPs who need a special version of a static document – you can do so by using the Filter from Report button in the upper right-hand corner of this screen. The report you'll need for this needs to meet the following conditions:

- The report type must be one where the Investor is the primary object (for example, **Investors with Investor Contacts** will work; **Entities with Investors** will not)
- It must contain the column **Investor ID**.
- It must be filtered to only include Investors for the Entity you've selected for your batch.
- The report is saved in a publicly accessible folder within AIM CRM.

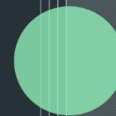
Set up other filter parameters so that the resulting list of Investors is those you want to include in your batch. Press Save, and the Investors not included in this report will be removed from this page as batch recipients.

## Manage Documents

There are three batch-wide types of documents Correspond Investor Edition allows you to send: static documents, split documents, and template documents. Descriptions of each are below:

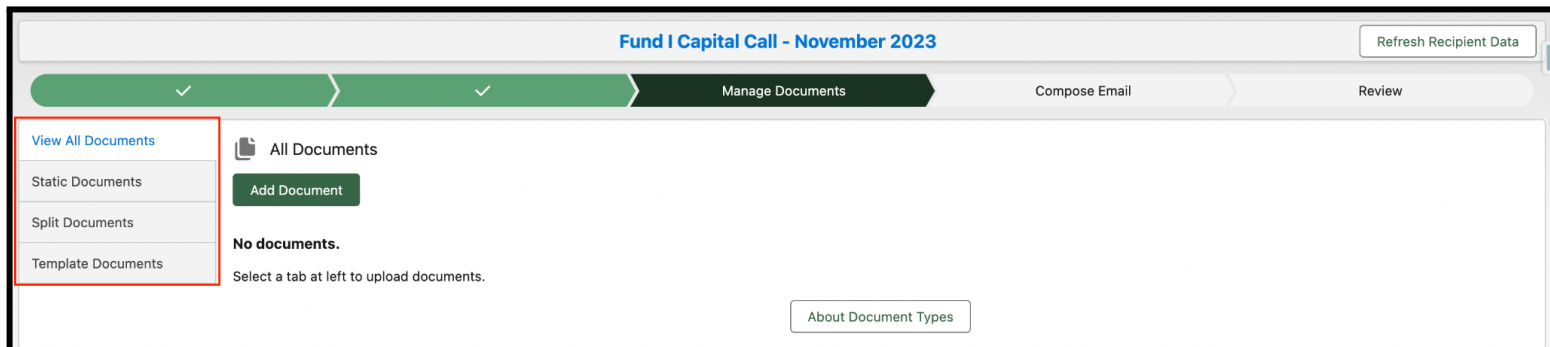
- **Static Documents:** Static documents are documents that do not contain any information that varies among Investors, so each Investor will receive the same document containing the same text. Examples include quarterly and annual reports, schedules, exhibits, memos, etc. Static documents will be uploaded 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 Investors using delimiters and merge keys. The maximum filesize for a single PDF document to be split in 200 MB.
  - **Match Existing Documents:** Separates one ZIP file containing many documents and assigns each document to the correct Investor within the batch using delimiters and merge keys that are found within the filename.
- **Template Documents:** Dynamic documents are created by populating a template with data unique to





an Investor. The data must be stored in fields on the Investor Correspondence object to be populated correctly within the created document. Please refer to the “AIM Docs Template Wizard” tab within AIM CRM when creating a template and adding fields to it.

You can create/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 Investors). 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.

You can assign specific ShareSecure categories that will be applied only to this document within the batch. If you would like to add the Investor Legal Name category to the Static Document this can also be done, however, it changes the behavior of the document delivery. If the Investor Legal Name category is added to a Static document, Correspond Investor Edition will create a separate copy of the Static document for each Investor and share that document with the correct Investor in the batch, this is done to ensure that no Investor Legal Name category is exposed to the wrong Investor within ShareSecure.

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** ?

Your batch name and record type have been added as categories automatically to all documents in this batch, so no need to add them manually here.

Add Investor Legal Name Category ?

Upload

## Split Documents

### Single Split Document

#### Before You Split: Document Formatting

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 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. 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*

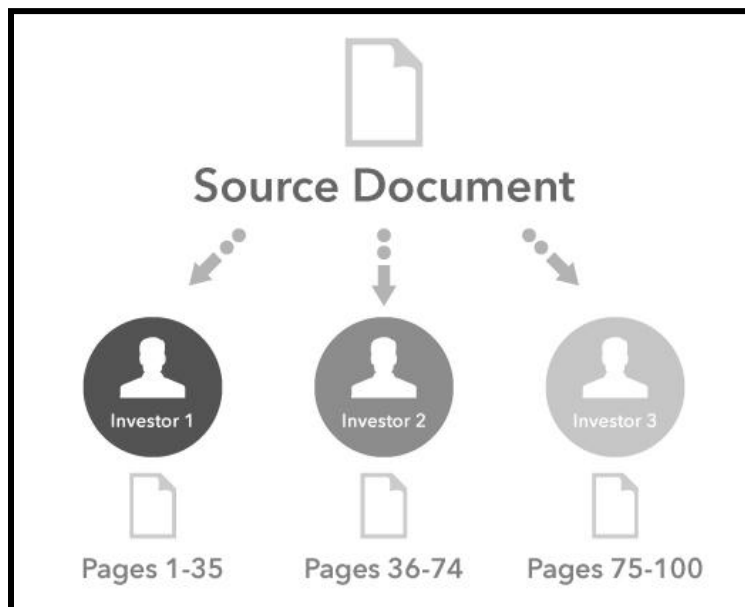
*Delimiter End*

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

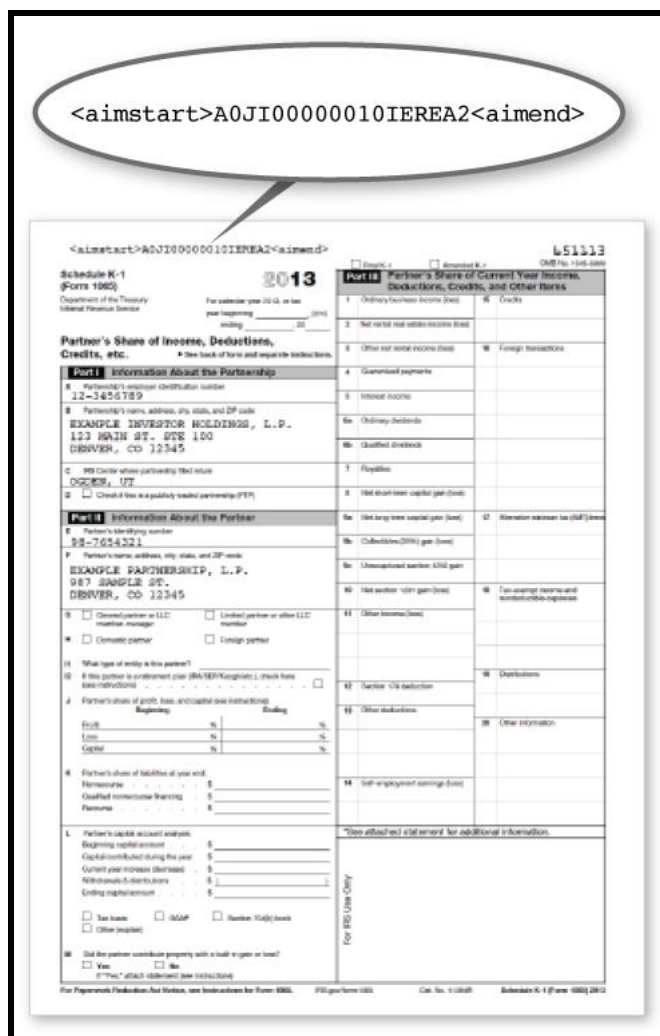
Correspond Investor Edition is capable of splitting a source document that produces multiple pages per investor, even if each investor's resulting document is of differing lengths. In other words, a source document that contains 100 pages can be properly split to produce 35 pages for one investor, 40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



## Splitting Your Document in Correspond Investor Edition

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

- **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

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Choose file

Upload File or Drop File


\* Delimiter Start

\* Delimiter End

Delimiter Merge Key

Delimiter Values and Merge Key For Splitting ⓘ


<aimstart>AIMInvOps\_\_UPPERCASE\_Investor\_Id\_\_c<aimend>

 **Document Options**

Document Name ⓘ

Append investor legal name to file name

Make Document(s) Read Only in ShareSecure ⓘ

 **ShareSecure Categories** ⓘ

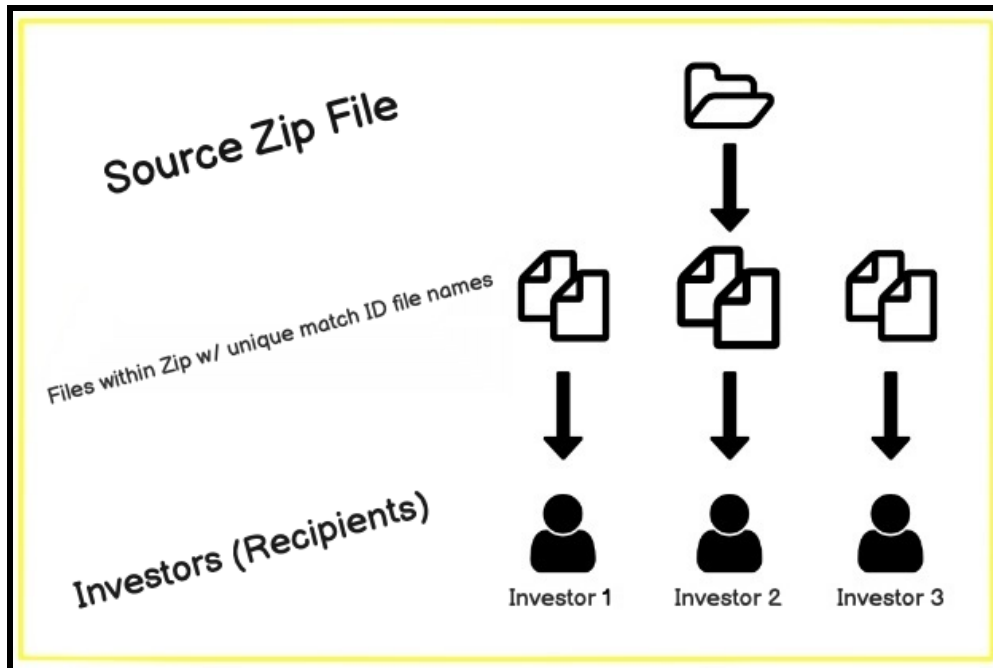
*Your batch name and record type have been added as categories automatically to all documents in this batch, so no need to add them manually here.*

Split

## Match Existing Documents

Correspond Investor Edition is capable of ingesting a ZIP file with many documents and assigning documents to the corresponding 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 Correspondence 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

---

Choose file

Upload Zip File or Drop Zip File

Delimiter Start (optional) ⓘ

Delimiter End (optional)

Delimiter Match ID

UPPERCASE Investor Id ▼

Field to be Matched ⓘ

AIMInvOps\_\_UPPERCASE\_Investor\_Id\_\_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** ⓘ

*Your batch name and record type have been added as categories automatically to all documents in this batch, so no need to add them manually here.*

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

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 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

or Drop Zip File

Delimiter Start (optional) i

Delimiter End (optional)

Delimiter Match ID

Investor Name
▼

Field to be Matched i

-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

- **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.

## Template Documents

By navigating to the template documents tab, you can add or replace templates to base dynamically generated documents on, or you can generate documents for the batch you're working on.

## Managing Existing Templates

Clicking the *Manage Existing Templates* button on the Template Documents tab will take you to a page where you can both add new template documents and replace or delete existing documents, all of which will be template options when you generate a dynamic, investor-specific document in the next step. All documents uploaded as templates for dynamically generated documents must be **docx** files.

	Document Name	↑ ↓	File Size	Last Modified	↑ ↓	Type
<a href="#">Replace</a>   <a href="#">Delete</a>	Distribution Notice Template		13.4 KB	11/21/2023, 2:50:52 PM		Microsoft Word
<a href="#">Replace</a>   <a href="#">Delete</a>	Capital Call Template		13.4 KB	11/21/2023, 2:50:33 PM		Microsoft Word

If the current instance of Correspond Investor Edition is connected to multiple ShareSecure Workspaces, a *Select Workspace* dropdown will appear. Document templates are Workspace specific, meaning there are separate sets of document templates per ShareSecure Workspace.



## Generating Template Documents

Once you've set up the templates you'd like to use, you'll be able to use them to generate documents that incorporate investor-specific merge data. This process can be started by using the *Generate Document from Template* button.

Generate Documents

📄 **Templates (2)**

🔍 Search Templates

Name <span style="float: right;">▼</span>	Type <span style="float: right;">▼</span>	Last Updated	View
<input checked="" type="radio"/> Capital Call Template	Microsoft Word	Nov 21, 2023	View
<input type="radio"/> Distribution Notice Template	Microsoft Word	Nov 21, 2023	View

> Override Template

📄 **Document Options**

Rename Files ⓘ

Append investor legal name to file name  
 Make Document(s) Read Only in ShareSecure ⓘ

# **ShareSecure Categories ⓘ**

*Your batch name and record type have been added as categories automatically to all documents in this batch, so no need to add them manually here.*

🔍 Search categories...

Generate Documents

Once you choose a template for your batch, you can choose investor-specific overrides for any Investors who need tweaked versions of your template. This option is held within the *Override Template* section that can be opened up if needed.

## Document Generation Options

- **Rename Files:** Entering a name into this field will rename each generated document as desired. You may leave this field blank, if you do so, the generated documents will be assigned the name of the Investor Correspondence Batch.
- **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 the generated document's file name 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 file name.
- **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 generated from a template.

Once you've generated your documents, you'll have a few options for interacting with your generated documents.



**Fund I Capital Call - November 2023** Refresh Recipient Data

✓
✓
Manage Documents
Compose Email
Review

View All Documents

Static Documents

Split Documents

Template Documents

↑ **Template**

Generate Document from Template

Manage Existing Templates

▼ Capital Call Template

**Inspector**

Use the inspector to double check merge data.

Launch Template Inspector

**Regenerate**

If you've changed merge data or templates themselves, you can regenerate your documents here.

Regenerate Documents

**Delete**

If you'd like to delete all documents generated from this template, do so here.

Delete Documents

Click the Generate Document from Template button to generate documents from a template.

Use the *Template Inspector* to double-check all of the data that's been merged into your documents, for each Investor. This searchable table includes a row for each Investor, and each column is a merge field that was included in the template document.

Review Template Doc: Capital Call Template

Investor	AIMInvOps__Amount__c	AIMInvOps__Batch_Date__c	AIMInvOps__Due_Date_Text__c	AIMInvOps__Investor_Pro_Rata__c	AIMInvOps__Merge_Entity_Name__c
PGA Capital Partners - Fund I	\$2,000,000.00	11/17/2023	November 24, 2023	12.99%	Fund I
SRS - Fund I	\$5,000,000.00	11/17/2023	November 24, 2023	32.47%	Fund I
State University Endowment - Fund I	\$2,400,000.00	11/17/2023	November 24, 2023	15.58%	Fund I
UTIMCO - Fund I	\$6,000,000.00	11/17/2023	November 24, 2023	38.96%	Fund I

If you need to make any changes to the data that's been merged into the template documents (or to the templates themselves), you can re-create the documents quickly after the change by clicking the *Regenerate Documents* button.

Lastly, if you need to remove all the documents you've generated via templates and start over, use the *Delete Documents* button.

### One-Off Investor-Specific Documents

If you ever need to add a one-off document for a specific Investor – for example, if a particular Investor 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 that investor and use the *+ Add Document* option to upload the document.



Preview Documents Generate Full Batch PDF Remove All Documents Save and Continue

Search recipients...

Showing 1-4 of 4 records.

Investor	Document	Document Type	Categories	
PGA Capital Partners - Fund I (+ Add Document)	Fund I Capital Call - November 2023_PGA Capital Partners.pdf	Template (Capital Call Template)	Capital Call, Fund I Capital Call - November 2023, PGA Capital Partners	
SRS - Fund I (+ Add Document)	Fund I Capital Call - November 2023_State Retirement System.pdf	Template (Capital Call Template)	Capital Call, Fund I Capital Call - November 2023, State Retirement System	
State University Endowment - Fund I (+ Add Document)	Fund I Capital Call - November 2023_State University Endowment.pdf	Template (Capital Call Template)	Capital Call, Fund I Capital Call - November 2023, State University Endowment	
UTIMCO - Fund I (+ Add Document)	Fund I Capital Call - November 2023_UTIMCO.pdf	Template (Capital Call Template)	Capital Call, Fund I Capital Call - November 2023, UTIMCO	

Showing 1-4 of 4 records.

## Compose Email

During this step of the Correspond Investor Edition process, you'll indicate whether you'd like to send a direct email as part of your batch.

Send Email?  Yes

Template: None Selected Manage Email Templates

Salutation Merge Fields Copy and paste into editor  
 Select merge field

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

Subject

Rich text editor: Salesforce Sans, 12, Bold, Italic, Underline, Link, Unlink, Bulleted List, Numbered List, Indent, Outdent, Undo, Redo, Text Color, Background Color

Email Signature: No Signature Manage Signatures

Send Documents as Attachments?  
 Include CC List?  
 Send Email to Recipients without Documents?

BCC Address

Preview Save as Email Template Save and Continue

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:

- **Salutation Merge Field:** In this dropdown, you'll find merge fields that you could use in your salutation to individuals who will be receiving this email (Investor Contacts). For example, this is where you'll find the Contact Name or Contact First Name.
- **Email Body Merge Field:** In this dropdown, you'll find merge fields that you might use in the subject or body of your email – for example, Amount or Due Date.



Template

None Selected

Manage Email Templates


Salutation Merge Fields ⓘ Copy and paste into editor

Select merge field ▼

Email Body Merge Fields ⓘ Copy and paste into editor

Select merge field ▼


Correspond Investor Edition allows users to create Email Templates that can be reused across Investor Correspondence 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  
Investor Correspondence Batch ▼

	Name	Subject
<a href="#">Edit</a>   <a href="#">Delete</a>	Capital Call	Capital Call for {!AIMInvOps__Merge_Investor_Legal_Name__c}
<a href="#">Edit</a>   <a href="#">Delete</a>	Capital Call 2	Capital Call for {!AIMInvOps__Merge_Investor_Legal_Name__c}
<a href="#">Edit</a>   <a href="#">Delete</a>	Capital Call Notice	Capital Call Notice for {!Entity__c}
<a href="#">Edit</a>   <a href="#">Delete</a>	Distribution Notice	Distribution Notice - {!AIMInvOps__Merge_Investor_Legal_Name__c}
<a href="#">Edit</a>   <a href="#">Delete</a>	General Fund Announcement	General Fund Announcement

If the current instance of Correspond Investor Edition is connected to multiple ShareSecure Workspaces, a *Select Workspace* dropdown will appear. Email templates are Workspace-specific, meaning there are separate sets of email templates per ShareSecure Workspace.

 **Email Templates**
Create Email Template

Select Workspace  
Maple Peak Partners (v2) ▼

Template Type  
Investor Correspondence Batch ▼

	Name	Subject
<a href="#">Edit</a>   <a href="#">Delete</a>	Capital Call	Capital Call for {!AIMInvOps__Merge_Investor_Legal_Name__c}
<a href="#">Edit</a>   <a href="#">Delete</a>	Capital Call 2	Capital Call for {!AIMInvOps__Merge_Investor_Legal_Name__c}

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 Investor Contacts receive.
- **Include CC List?:** If this is selected, a line will be added to the email indicating which Investor Contacts associated with an individual Investor have received this email. For example, if one Investor has two Investor Contacts named Joe Smith and Jane Doe who will receive a direct email, the line added to the end of the email delivered to Joe Smith would be "cc: Joe Smith (joesmith@email.com),

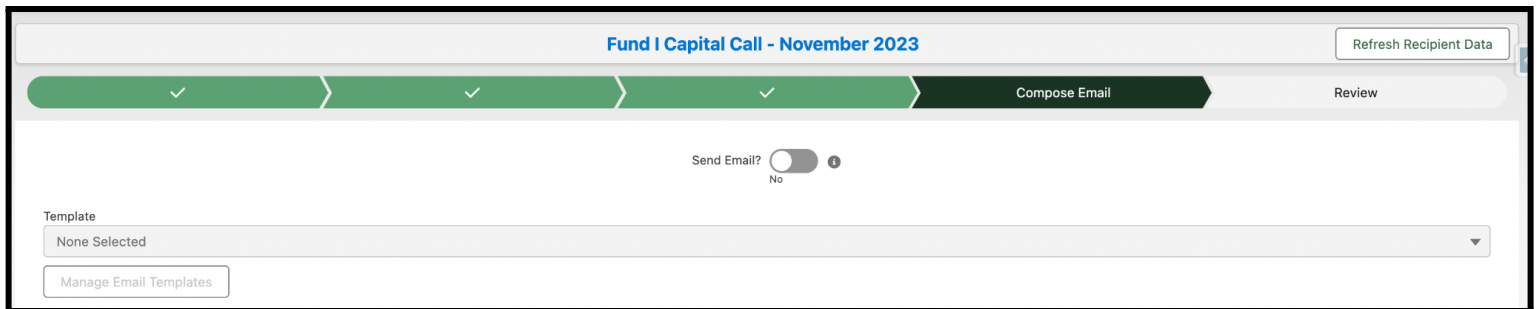


Jane Doe (janedoe@email.com)". You can use the Preview button at the bottom of this page to see exactly how the email for a particular Investor will look with this box checked.

- **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.

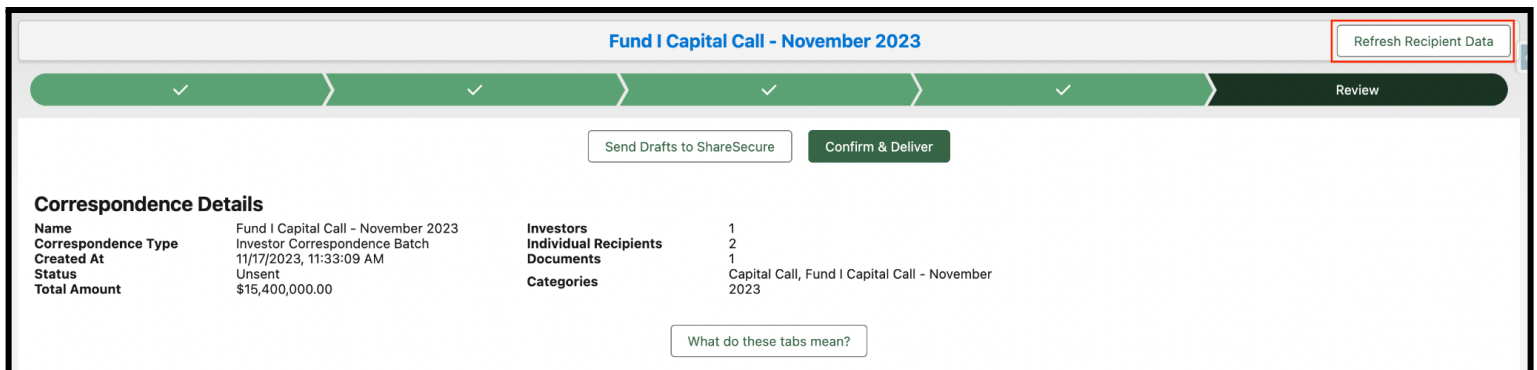
Finally, you'll be able to choose a preset signature to append to the end of the email. Clicking the *Manage Signatures* button will allow you to add a new signature or designate a different primary signature. If the current instance of Correspond Investor Edition is connected to multiple ShareSecure 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).



## Refreshing Recipient Data

As you put your batch together, if you notice any email addresses or preferences that need to be changed, you can do so by clicking on the Investor Contact in question and making updates. For those changes to take effect in any batches that have already been started, you'll need to click the new *Refresh Recipient Data* button you'll see in the upper right hand corner of any screen in Correspond Investor Edition.



You can refresh data as many times as you'd like as you put your batch together. The best practice we suggest is to click Refresh Recipient Data right before sending your batch to ensure that you're taking



advantage of the most up-to-date data in AIM CRM.

The *Refresh Recipient Data* button will not pull in any net new Investor records that were created related to the Entity the batch was created for. If you do add new Investor records, a new Investor Correspondence Batch will need to be created for those to be pulled in successfully.

## 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:

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

Fund I Capital Call - November 2023
Refresh Recipient Data

✓
>
✓
>
✓
>
✓
>
Review

Send Drafts to ShareSecure
Confirm & Deliver

**Correspondence Details**

<b>Name</b>	Fund I Capital Call - November 2023	<b>Investors</b>	1
<b>Correspondence Type</b>	Investor Correspondence Batch	<b>Individual Recipients</b>	2
<b>Created At</b>	11/17/2023, 11:33:09 AM	<b>Documents</b>	1
<b>Status</b>	Unsent	<b>Categories</b>	Capital Call, Fund I Capital Call - November 2023
<b>Total Amount</b>	\$15,400,000.00		

What do these tabs mean?

**Investors Receiving Correspondence**
Investors Who Won't Receive Correspondence

SRS - Fund I
—
\$5,000,000.00

Recipient	Document Type	Document	Categories	Delivery Methods	
<a href="#">Carolina Webster</a> <small>(cwebster@app-xdemo.com)</small>	Template	<a href="#">Fund I Capital Call - November 2023_State Retirement System.pdf</a>	Capital Call, Fund I Capital Call - November 2023, State Retirement System	Email, ShareSecure	<a href="#">Preview Email</a>
<a href="#">Tad Nixon</a> <small>(tnixon@app-xdemo.com)</small>	Template	<a href="#">Fund I Capital Call - November 2023_State Retirement System.pdf</a>	Capital Call, Fund I Capital Call - November 2023, State Retirement System	No Correspondence Preferences	

- Investors Who Won't Receive Correspondence:** This tab displays a list of Investors who should be receiving documents as part of this batch – in other words, Investors where *Send Correspondence?* is checked on the Choose Recipients page – but will not, either because 1) they lack Investor Contacts or 2) their Investor Contacts lack Correspondence Preferences for this batch type.





**Fund I Capital Call - November 2023** Refresh Recipient Data

Review

Send Drafts to ShareSecure Confirm & Deliver

**Correspondence Details**

<b>Name</b>	Fund I Capital Call - November 2023	<b>Investors</b>	1
<b>Correspondence Type</b>	Investor Correspondence Batch	<b>Individual Recipients</b>	2
<b>Created At</b>	11/17/2023, 11:33:09 AM	<b>Documents</b>	1
<b>Status</b>	Unsent	<b>Categories</b>	Capital Call, Fund I Capital Call - November 2023
<b>Total Amount</b>	\$15,400,000.00		

[What do these tabs mean?](#)

Investors Receiving Correspondence **Investors Who Won't Receive Correspondence**

- 🔒 **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:** If this tab appears, you'll find a list of Investor Contacts whose Correspondence Preferences indicate they should receive this batch via email but don't have an email address set on their Investor Contact record.

## 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).

**Fund I Capital Call - November 2023** Refresh Recipient Data

Review

Send Drafts to ShareSecure Confirm & Deliver

**Correspondence Details**

<b>Name</b>	Fund I Capital Call - November 2023	<b>Investors</b>	1
<b>Correspondence Type</b>	Investor Correspondence Batch	<b>Individual Recipients</b>	2
<b>Created At</b>	11/17/2023, 11:33:09 AM	<b>Documents</b>	1
<b>Status</b>	Unsent	<b>Categories</b>	Capital Call, Fund I Capital Call - November 2023
<b>Total Amount</b>	\$15,400,000.00		

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.

**Fund I Capital Call - November 2023** Refresh Recipient Data

Review

Remove Drafts from ShareSecure View In ShareSecure Confirm & Deliver

**Correspondence Details**

<b>Name</b>	Fund I Capital Call - November 2023	<b>Investors</b>	1
<b>Correspondence Type</b>	Investor Correspondence Batch	<b>Individual Recipients</b>	2
<b>Created At</b>	11/17/2023, 11:33:09 AM	<b>Documents</b>	1
<b>Status</b>	Drafts sent	<b>Categories</b>	Capital Call, Fund I Capital Call - November 2023
<b>Total Amount</b>	\$15,400,000.00		



## Confirm & Deliver

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

[Refresh Recipient Data](#)

Remove Drafts from ShareSecure
View In ShareSecure
Confirm & Deliver

**Correspondence Details**

<b>Name</b>	Fund I Capital Call - November 2023	<b>Investors</b>	1
<b>Correspondence Type</b>	Investor Correspondence Batch	<b>Individual Recipients</b>	2
<b>Created At</b>	11/17/2023, 11:33:09 AM	<b>Documents</b>	1
<b>Status</b>	Drafts sent	<b>Categories</b>	Capital Call, Fund I Capital Call - November 2023
<b>Total Amount</b>	\$15,400,000.00		

## Using the Delivery Report

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

[Review](#)

Home
View in ShareSecure
Export to Excel

**ShareSecure Deliveries**

**ShareSecure Views**

**Email Deliveries**

**Email Opens**

**Delivery Report**   Failures   Batch Details

ADIA - Fund II: \$0.00

Status	Contact	Delivery Method	First Opened (Email)	ShareSecure View Status	
Opened	<a href="#">Caroline Edmunds</a>	Email	9/08/2023, 12:49 PM MDT		<a href="#">View Email</a>
Delivered	<a href="#">Caroline Edmunds</a>	ShareSecure		Not Viewed	<a href="#">View Documents</a>
Opened	<a href="#">Connor Henderson</a>	Email	9/08/2023, 12:49 PM MDT		<a href="#">View Email</a>
Delivered	<a href="#">Connor Henderson</a>	ShareSecure		Not Viewed	<a href="#">View Documents</a>

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

### **If a new Contact joins a firm and needs to be added as an Investor Contact for several Investor commitments, how can I do so most efficiently?**

Add that Contact as a Master Investor Contact to his/her new firm. Once you do that, you'll have the option to use the + Investor Contacts button to create Investor Contacts across all of that firm's existing Investor commitments.

### **How should I update Investor Contacts if a Contact leaves a firm and should no longer receive correspondence?**

You can deactivate that Contact's Master Investor Contact for that firm. Simply press the Deactivate button and select all Investor Contacts where Preferences should be removed. Once you deactivate that MIC, its Active checkbox will be unchecked, and that MIC will no longer appear as an option when creating Investor Contacts through the + Investor Contacts popup on a firm's Investor commitments.

### **How many total recipients can I include in a batch?**

A single batch can include up to 5,000 individual recipients (Investor Contacts).

### **How many Investors can I include in a single batch?**

A single batch can include up to 400 Investors.

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

100 MB.

### **What are the file size limits associated with single-split documents?**

The largest file size you can split is 250 MB or 20,000 pages. The largest investor-specific document file size is 3,000 pages.

### **What are the file size limits associated with files held within a Zip file?**

Files within the zip should be no more than 10MB in size per file.

### **What's the largest Full Batch PDF I can generate?**

250 MB.

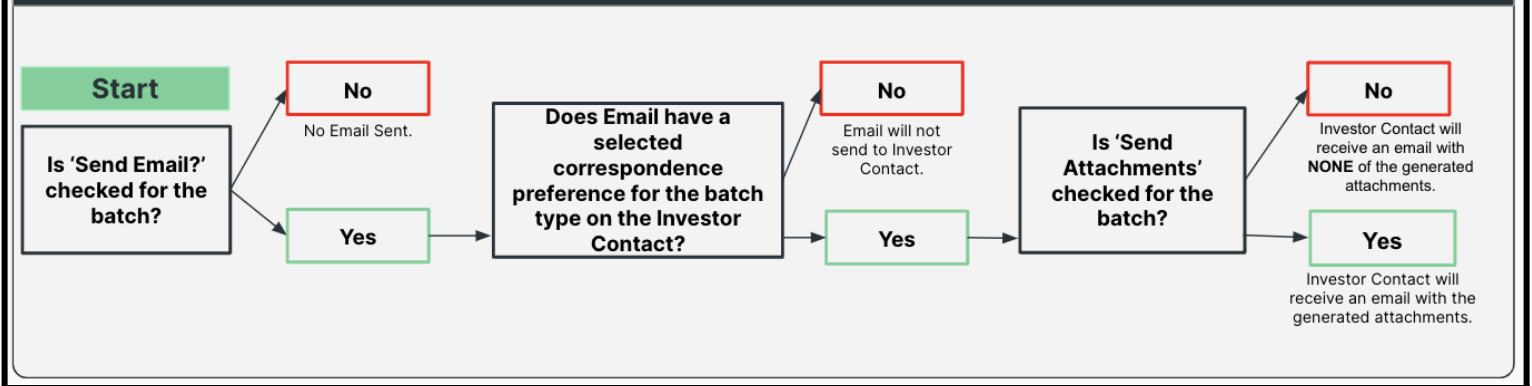
### **Can I send an Investor Correspondence Batch without any documents attached?**

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

### **When does Correspond Investor Edition send direct emails to recipients?**



## When does **Correspond Investor Edition** send emails?



*\*Note that anytime a document is shared with a user via ShareSecure, they will receive a separate email from ShareSecure, unless notifications have been paused in ShareSecure or the user opted not to receive notifications from ShareSecure.*