



User Guide:

Follow-Up Emails in Correspond Investor Edition

Now, Correspond Investor Edition offers the ability to send follow-up emails directly from the delivery report of a given delivered batch. This functionality provides GPs with a streamlined communication workflow to investors. GPs will have access to relevant contacts and email addresses for any given investor as well as access to the previous email body for all the context needed for a follow-up email to an investor.

This product enhancement:

- Streamlines the GP-LP communication workflow to quickly follow-up with investors.
- Allows you to reply on top of original emails sent within Correspond Investor Edition.
- Saves you time going through Correspond Investor Edition to find communications.
- Allows you to provide a high-touch investor experience.

Within Correspond Investor Edition's delivery report, if the given batch included direct emails to investors, end users will see a *Send Follow-Up Email* button. (Granted that there was at least one successful email delivery for a given investor.)

- Follow-Up Emails are investor specific due to the nature of possible merge fields included within the initial email body related to the given investor information.

The screenshot displays the 'ShareSecure Deliveries' section of a delivery report. It features three donut charts and a table of delivery details.

Status	Contact	Delivery Method	First Opened (Email)	ShareSecure View Status
Delivered	Julio Rodriguez	Email		View Email
Failed Cannot Deliver	Julio Rodriguez	ShareSecure		
Delivered	Kris Bryant	Email		View Email
Failed Cannot Deliver	Kris Bryant	ShareSecure		

Pressing the 'Send Follow-Up Email' button will open a pop up that will display an email creation screen (see below).

- The email creation screen will include the subject of the initial email that was sent in the batch. This can be edited, **but editing the subject may cause the follow-up email to not appear within the same thread in the recipient's inbox.**



- If the *'Include the value of original email'* checkbox at the bottom of the email creation screen is checked, **then the email body of the original email will be included in the body of the follow-up email.**

Follow-Up Email for Boeing Company Pension Fund - Altvia Sample Fund I, LP

Salutation Merge Fields ⓘ
 Contact Name ▾ Copy and paste into editor
 {!AIMInvOps__Contact_Name_String__c}

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

Subject ⓘ
 {!AIMInvOps__Entity_Name__c} Capital Call Notice

Salesforce Sans ▾ 12 ▾ B I U S [List Icons] [Link Icon] [Text Icon]

Hello {!AIMInvOps__Contact_Name_String__c},
 This is a follow-up email to the Capital Call email that we sent to you previously, please see the contents below.
 Thanks,
 {!AIMInvOps__Entity_Name__c}

Include the value of original email

Email Signature
 No Signature ▾

Cancel Next

Charlie Blackmon Email View Email

After the follow-up email has been created, the next screen will display the list of recipients that will receive a follow-up email for the given investor. **This list of recipients is pulled based on the initial email delivery statistics, if a recipient successfully received the initial email then they will be pulled into the list of recipients to receive the follow-up email.**

- Users have the option to view the contents of the email being sent to a given recipient using the *View Email* option that can be found within the table.

Follow-Up Email for Boeing Company Pension Fund - Altvia Sample Fund I, LP

Recipients:

Contact	Delivery Method	Email Preview
Julio Rodriguez	Email	View Email
Kris Bryant	Email	View Email

Back Send

Pressing the *Send* button will send out the follow-up email to the listed recipients. **Once delivered, follow-up email delivery statistics can be viewed via the link labeled *Follow-Up Email Deliveries* next to the *Send Follow-Up Email* button.**



Delivery Report Failures Batch Details

Failed: 0

Boeing Company Pension Fund - Altvia Sample Fund I, LP: \$1,714,285.71 [Send Follow-Up Email](#) [Follow-Up Email Deliveries](#)

Status	Contact	Delivery Method	First Opened (Email)	ShareSecure View Status	
Delivered	Julio Rodriguez	Email			View Email
Failed Cannot Deliver	Julio Rodriguez	ShareSecure			
Delivered	Kris Bryant	Email			View Email
Failed Cannot Deliver	Kris Bryant	ShareSecure			

Capital University Endowment - Altvia Sample Fund I, LP: \$1,285,714.29 [Send Follow-Up Email](#)

Status	Contact	Delivery Method	First Opened (Email)	ShareSecure View Status	
Delivered	Charles Schwab	Email			View Email
Failed Cannot Deliver	Charles Schwab	ShareSecure			
Delivered	Charlie Blackmon	Email			View Email
Failed Cannot Deliver	Charlie Blackmon	ShareSecure			

Multiple follow-up emails to the same investor is supported, and the statistics for each follow-up email sent will be broken out by the specific date the follow-up email was sent within the *Follow-Up Email Deliveries* report.

Follow-Up Email Deliveries for Boeing Company Pension Fund - Altvia Sample Fund I, LP

Follow-Up sent on Mar 21, 2024

Status	Contact	Delivery Method	First Opened	Email Preview
Delivered	Kris Bryant	Email		View Email
Delivered	Julio Rodriguez	Email		View Email

FAQs

Can you attach the original attachment sent to the follow-up email?

- No, only the contents of the original email can be included in the follow-up email.

Is it possible to add a BCC address to a follow-up email?

- No, a BCC address cannot be added to a follow-up email at this time.