



# Interactions User Guide

Interactions represent communication between your organization and other individuals and firms. These Interactions relate to other records in AIM including Accounts, Contacts, Deals, and Investors. The purpose of Interactions is to log touch points and accompanying notes that can be valuable to understanding the status of relationships and active fundraising or investing opportunities. This includes emails to potential LPs, calls regarding due diligence, meetings with advisors or intermediaries, annual meetings, etc. Interactions provide transparency across your organization, track emails and calls for compliance, provide insight on coverage, and empower leadership to understand employee activity.

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## Interactions Differentiation

### What are Interaction References?

Interaction References are the real power behind Interactions. They connect Interactions to the other relevant records within AIM. One Interaction can be linked to multiple Interaction References. Interaction References link an Interaction to whichever records in the system represent participants or referenced topics. The following objects can be referenced by Interactions:

- Account
- Contact
- Entity
- Deal
- Fund
- Fundraising
- Investor
- User

### Why Use Interactions Instead of Salesforce Activities?

Interactions are a proprietary solution and they replace standard Salesforce Activities (Tasks, Events, Emails) because Interactions can be related to multiple WHO records (Contacts) and multiple WHAT records (Accounts, Contacts, Deals, Funds, Investors, etc). Salesforce activities allow multiple WHO records but only one WHAT record. For example, if a user discusses multiple investment opportunities (Entities) or co-investment Deals with an Investor, Salesforce Activities would not allow the user to link to all of these records.

### What Happens when an Interaction is Created?

If an Interaction is created with a Reference or multiple References, a few key automated events occur. **Cascading** will happen which means that if a Contact, Deal, Fund, Fundraising, or Investor record is referenced, an Interaction Reference will be created for its parent Account. **Last Interaction/Last Interaction Date** and **Last Touch/Last Touch Date** fields on any record that has been referenced will be updated once that Reference has been saved. Additionally, if the Summary field is left blank, it will be populated with the first 255 characters of the Notes field.



## How to Enter Interactions

### Interactions Page Overview

\* Exact fields will vary in each org

Interaction **Meeting with State U**

Type	Date	Owner	
Conference	5/26/2020	Ryan Watts	

Interaction Name	Meeting with State U	
Type	Conference	
Date	5/26/2020	
Summary	Intro meeting with State University. They are interested in investing.	
Interaction Notes	Good meeting with State University. Discussed potential investments and next steps on diligence. Kathy will follow up with materials and will set up next meeting date. Multiple partners should be involved in the meeting to finalize the LPA.	

System Information

Created By	Ryan Watts, 3/3/2020 2:55 PM	Last Modified By	MaplePeak Admin, 1/5/2024 8:27 AM
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Interaction References (3)

	Name	Reference Type	Notes	Touch
<div style="display: inline-block; border: 1px solid #ccc; padding: 2px 5px; margin-right: 5px;">Edit</div> <div style="display: inline-block; border: 1px solid #ccc; padding: 2px 5px;">Delete</div>	State University Endowment (Account)	Participant		<input checked="" type="checkbox"/>
<div style="display: inline-block; border: 1px solid #ccc; padding: 2px 5px; margin-right: 5px;">Edit</div> <div style="display: inline-block; border: 1px solid #ccc; padding: 2px 5px;">Delete</div>	White Family Investing (Account)	Referenced	White Family is large donor to State U	<input type="checkbox"/>
<div style="display: inline-block; border: 1px solid #ccc; padding: 2px 5px; margin-right: 5px;">Edit</div> <div style="display: inline-block; border: 1px solid #ccc; padding: 2px 5px;">Delete</div>	Maple Partners VII, L.P. (Entity)	Entity	Interested in Fund VII	<input type="checkbox"/>

Add New Reference

1. **Interactions Header** - Key summary fields about the Interaction. Fields displayed in the header can be adjusted based on organization preference.
2. **Interactions Fields** - Key fields about the Interaction. The fields, field order, and picklist values can be adjusted based on organization preference.
3. **Summary** - The Summary field is used to enter a brief summary of the Interaction (maximum of 255 characters). If this field is left blank, it will be automatically populated with the first 255 characters of the Interaction Notes field. The Summary field is often used in reporting.
4. **Reference List** - This field will automatically populate with the References, separated by commas. Users should not populate this field. This field makes it easier to report on Interactions and associated References.
5. **Interaction Notes** - The Interaction Notes field is used to enter detailed notes about the Interaction. Formatting in this field is supported. This field has a 32k character limit.
6. **Interaction References** - After an Interaction is saved, users can quickly add References to all relevant records. Users can capture the Reference Type and any relevant notes about the Reference.



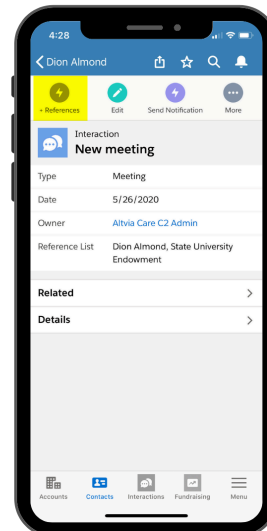
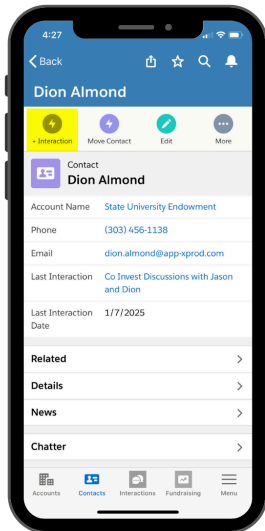


Cascading means that, when you create a reference to a Contact, Deal, Fund, Fundraising, or Investor record, our code creates a 'cascaded' reference to that record's parent Account record. If you need to add additional Interaction References, click on the green "Add New Reference" button to quickly add additional References from the Interaction record.

Interaction References (2)					
		Name	Reference Type	Notes	Touch
Edit	Delete	State University Endowment (Account)	Cascade	Cascade from Dion Almond	<input type="checkbox"/>
Edit	Delete	Dion Almond (Contact)			<input type="checkbox"/>
<div style="border: 1px solid red; padding: 5px; display: inline-block;">Add New Reference</div>					

### Entering Interactions - Mobile App

Salesforce's mobile app (available on [Apple's App Store](#) or the [Google Play store](#)) enables on-the-go Interaction creation. Just like on the desktop version, we recommend creating an Interaction from one of the records you'd like to reference.



### Entering Interactions - e2sf

Users can send or forward emails to their specified Email to Salesforce (e2sf) email address to archive the email message as a new Interaction record in AIM. Your organization's unique e2sf email address will end in "@e2sf.com". If you do not know your e2sf email address, please contact [Altvia Support](#).

e2sf will automatically create an Interaction and Interaction References for any Contacts whose email addresses are found in the email (From, To, CC, and Email Body). References will also be created with the cascade feature covered above.



Users can specify information to be included in the Interaction record that references existing records in AIM by adding information to the top of the email body.

### To Add Information to the Interaction

Type = \_\_\_\_\_ (sets the Type field on the resulting Interaction)

Summary = \_\_\_\_\_ (sets the Summary field on the Interaction, 255 characters max)

### To Reference other Records

Touch = \_\_\_\_\_ (references created for the Interaction to be flagged as Touch)

Account = \_\_\_\_\_ (adds Reference to an Account)

Contact = \_\_\_\_\_ (adds Reference to a Contact \*and cascades to Account)

Deal = \_\_\_\_\_ (adds a Reference to a Deal \*and cascades to Account)

Fund = \_\_\_\_\_ (adds a Reference to a Fund \*and cascades to Account)

Fundraising = \_\_\_\_\_ (adds a Reference to a Fundraising \*and cascades to Account)

Investor = \_\_\_\_\_ (adds a Reference to an Investor \*and cascades to Account)

Entity = \_\_\_\_\_ (adds a Reference to an Entity)

### e2sf Best Practices

- **Include References and Additional Information** - As noted in the overview above, instructions can be typed at the top of your email message to automatically connect the Interaction with other records in the system. Valid Interaction References can be made to Accounts, Contacts, Deals, Funds, Fundraising, Investors, or Entities. If you do not specify "Contact=" as an instruction, then e2sf will search for every email address in the message and create a Reference for any contacts whose email addresses are included in the email.
- **Use Descriptive Subject Lines** - The Subject from the email will be imported into AIM as the Subject for the Interaction. Therefore, users are encouraged to change the Subject before forwarding the email into AIM to more accurately depict the nature of the Interaction. For example: "Quarterly Update" could be amended to "Q2 2020 Update."
- **Include Attachments** - All email attachments up to 10 MB are archived and attached to Interactions. If the file is larger than 10MB, best practice is to upload directly to the File section on the Interaction record.
- **Add a Summary** - You can use the "Summary=" instruction to add information to the Summary field for the Interaction. If no summary information is included, the Summary will contain the first 255 characters of the email message. The Summary instruction is limited to 255 characters (about 2 lines) for reporting purposes.
- **Do not forward every email into AIM** - You and your team may rely on data in the Interactions tab to see concise, relevant information about important records. Forwarding every email into AIM may create clutter and difficulty in finding relevant or important Interactions.
- **Use a Blank Link Separator** - In order for e2sf to know when the instructions end, users must insert a blank line (or carriage return) between the last instruction and the first line of the email message body.

If you're viewing emails on your mobile device that you want to record as an Interaction, the easiest and fastest way to do that is to forward the email to your Email to Salesforce (e2sf) address. This will create an Interaction and References for every email address that is associated with a Contact in your system.

## Entering Interactions - Tasks and Events

Salesforce Activities (Tasks, Events) automatically convert to Interactions.

Tasks convert to Interactions once the Status field is updated to 'Completed'. References are created for each record referenced in the Task or Event's 'Related To' and Name fields.



### Task Creation:

+ Task
— ✎ ✕

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**\* Status**

Completed ▼

**\* Priority**

Normal ▼

**\* Due Date**

12/13/2023 📅

**Subject**

Send fund marketing materials 🔍

**Name**

👤 Christof Wojciak ✕

**Related To**

🏢 Lake University Endowment ✕

Save

### Created Interaction from Task:

💬 Interaction  
**Send fund marketing materials**

Type  
Closed Task - Completed

Date  
12/13/2023

Owner  
👤 Ryan Watts

---

Interaction Name	Send fund marketing materials	✎
Type	Closed Task - Completed	✎
Date	12/13/2023	✎
Summary	Send fund marketing materials	✎
Interaction Notes	Send fund marketing materials	✎

▼ System Information

Created By 👤 Ryan Watts, 5/27/2020 8:41 AM

Last Modified By 👤 MaplePeak Admin, 2/28/2024 9:55 AM

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🔗 Interaction References (2)

	Name	Reference Type	Notes	Touch
<span style="border: 1px solid #ccc; padding: 2px 5px;">Edit</span> <span style="border: 1px solid #ccc; padding: 2px 5px; margin-left: 5px;">Delete</span>	<span style="color: #0070c0;">👤 Christof Wojciak (Contact)</span>	Closed Task - Completed	Closed Task - Completed	<input type="checkbox"/>
<span style="border: 1px solid #ccc; padding: 2px 5px;">Edit</span> <span style="border: 1px solid #ccc; padding: 2px 5px; margin-left: 5px;">Delete</span>	<span style="color: #0070c0;">🏢 Lake University Endowment (Account)</span>	Closed Task - Completed	Closed Task - Completed	<input type="checkbox"/>

Add New Reference



Events convert to Interactions once the Start Date and Time has passed. The fields that transfer from the Event to the Interaction are: Date, Subject, Description, and Location.

### Event Creation:

Meeting to Review Fund Materials
⌵ ⌵ ⌵

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Subject

Meeting to Review Fund Materials 🔍

**Start**

**Date**  📅 **Time**  🕒

**End**

**Date**  📅 **Time**  🕒

All-Day Event

Name

👤 Christof Wojciak ✕

Related To

🏢 Lake University Endowment ✕

**Assigned To**

Save

### Interaction created from Event:

🗨️

Interaction

**Meeting to Review Fund Materials**

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Type	Date	Owner
Event	12/13/2023	<span style="color: #0070c0;">👤 Ryan Watts</span>

---

Interaction Name	Meeting to Review Fund Materials	✎
Type	Event	✎
Date	12/13/2023	✎
Summary	Meeting to Review Fund Materials	✎
Interaction Notes	Meeting to Review Fund Materials	✎

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System Information

Created By <span style="color: #0070c0;">👤 Ryan Watts, 5/27/2020 9:02 AM</span>	Last Modified By <span style="color: #0070c0;">👤 MaplePeak Admin, 2/28/2024 9:57 AM</span>
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📄

**Interaction References**

(2)

	Name	Reference Type	Notes	Touch
<div style="display: flex; gap: 5px;"> <span style="border: 1px solid #ccc; padding: 2px 5px;">Edit</span> <span style="border: 1px solid #ccc; padding: 2px 5px;">Delete</span> </div>	<a href="#">Lake University Endowment (Account)</a>	Event	Cascade from Christof Wojciak	<input type="checkbox"/>
<div style="display: flex; gap: 5px;"> <span style="border: 1px solid #ccc; padding: 2px 5px;">Edit</span> <span style="border: 1px solid #ccc; padding: 2px 5px;">Delete</span> </div>	<a href="#">Christof Wojciak (Contact)</a>	Event	Event	<input type="checkbox"/>

Add New Reference





## Email Plugins, Calendar Syncs, and Third Party Products

Most email plugins and calendar syncs push emails and events to Salesforce as Tasks, Events, or Email Messages. AIM's code creates Interactions and Interaction References from those standard Salesforce records, parsing each one to find email addresses from which to create Interaction References. We regularly test the Salesforce plugin for Gmail/Outlook and recommend using that as your email plugin solution.

There are third party products that fall outside the email connector/calendar sync categories that create Tasks and Events in Salesforce. Our code will also attempt to convert those records into Interactions and Interaction References as well. If you would **not** like to convert those, please contact [Altvia Support](#) to restrict parameters for conversion.

## Correspond: Market Edition

When you send a Correspond: Market Edition mailing with 100 or fewer recipients, you can create a separate Interaction (and References) for each recipient.

Preview Project Wolverine Mailing

Recipients

Export as CSV

Search:

First	Last	Account	Email	Opted Out?	Documents
Luke	Mackenzie	Harvard Endowment	demos+luke.mackenzie@altvia.com	No	<a href="#">Preview Email</a>
Peter	Thiel	Peter Thiel	demos+pthiel@altvia.com	No	<a href="#">Preview Email</a>
Joseph	Vaughan	UTIMCO	demos+joseph.vaughan@altvia.com	No	<a href="#">Preview Email</a>
Matt	Danzeisen	Peter Thiel	demos+mdanzeisen@altvia.com	No	<a href="#">Preview Email</a>
Christopher	Wright	UTIMCO	demos+christopher.wright@altvia.com	No	<a href="#">Preview Email</a>
Andrew	Smith	Colorado Funds, LLC	andrew+demos@altvia.com	No	<a href="#">Preview Email</a>
Una	Gill	UTIMCO	demos+una.gill@altvia.com	No	<a href="#">Preview Email</a>
James	Smith	Broomfield Family Office	demos+james@altvia.com	No	<a href="#">Preview Email</a>
Theresa	Walker	UTIMCO	demos+theresawalker@altvia.com	No	<a href="#">Preview Email</a>
Andrew	Sullivan	Teachers Pension Fund	demos+andrew.sullivan@altvia.com	No	<a href="#">Preview Email</a>
Jasmine	Vance	Abu Dhabi Investment Authority (ADIA)	demos+jasmine.vance@altvia.com	No	<a href="#">Preview Email</a>
Bob	Smith	Smith Family Office	demos+bob@altvia.com	No	<a href="#">Preview Email</a>
Conor	Henderson	Abu Dhabi Investment Authority (ADIA)	demos+conor.henderson@altvia.com	No	<a href="#">Preview Email</a>
Aaron	Oberman	Smith Family Office	craig+aaron.oberman@altvia.com	No	<a href="#">Preview Email</a>
Jill	Montera	Buchanan Advisors	jill+demo@altvia.com	No	<a href="#">Preview Email</a>

Showing 1 to 15 of 15 entries

Previous 1 Next

Create Interactions for Recipients ?

Send Test Email | Test recipients (use commas between email addresses)

Send Mailing Now | Schedule Send

## PPMs

When sending a PPM Batch, you have the option to create a corresponding Interaction (and References) for all recipients in the PPM Batch.

New PPM

Correspondence Details | Select Recipients | Manage Documents | Compose Email | Review

PPM Batch Name:

Owner: [MaplePeak Admin](#)

Entity:  X

Starting Number:

Date:  📅

Deliver To ShareSecure:

Create Interactions:

[ShareSecure Categories](#)

Cancel Save



## How to Share Interactions

### Printable View

By clicking the 'Printable View' button, you can generate a print-ready PDF for every Interaction.

### Send Notifications

Use the 'Send Notifications' button to send users, groups or people an email notification with information about an Interaction, along with the option to include a print-ready PDF of its contents.

### View All Interactions

You can access a print-ready list of all Account, Contact, Deal, Entity, Fund, Fundraising, or Investor record's Interactions by clicking the 'View All' button on that record's Interaction related list. The 'View All' button shows all related Interactions, including the details. Users are able to add filters including Start Date, End Date, Exact Date, Interaction Owner, and Interaction Type. Users are also able to click the 'Printable View' button to generate a print-ready pdf of all Interactions, including the details.

**Interactions for Account: Lake University Endowment**

Clear Filters **Printable View**

Start Date: [ ] End Date: [ ] Exact Date: [ ]

Interaction Owner: [ ] Interaction Types: 1 selected (All Types X)

**Meeting to Review Fund Materials**

**Subject** Meeting to Review Fund Materials  
**Date** 2023-12-13  
**Interaction Notes** Meeting to Review Fund Materials

**Send fund marketing materials**

**Subject** Send fund marketing materials  
**Date** 2023-12-13  
**Interaction Notes** Send fund marketing materials

The 'View All' link at the bottom of the related list shows a list view of all Interactions, but does not display details like Interaction Summary and Notes.

**Interactions (10+)** [Settings] [Refresh] [New] [View All]

10+ items • Sorted by Date • Updated a few seconds ago

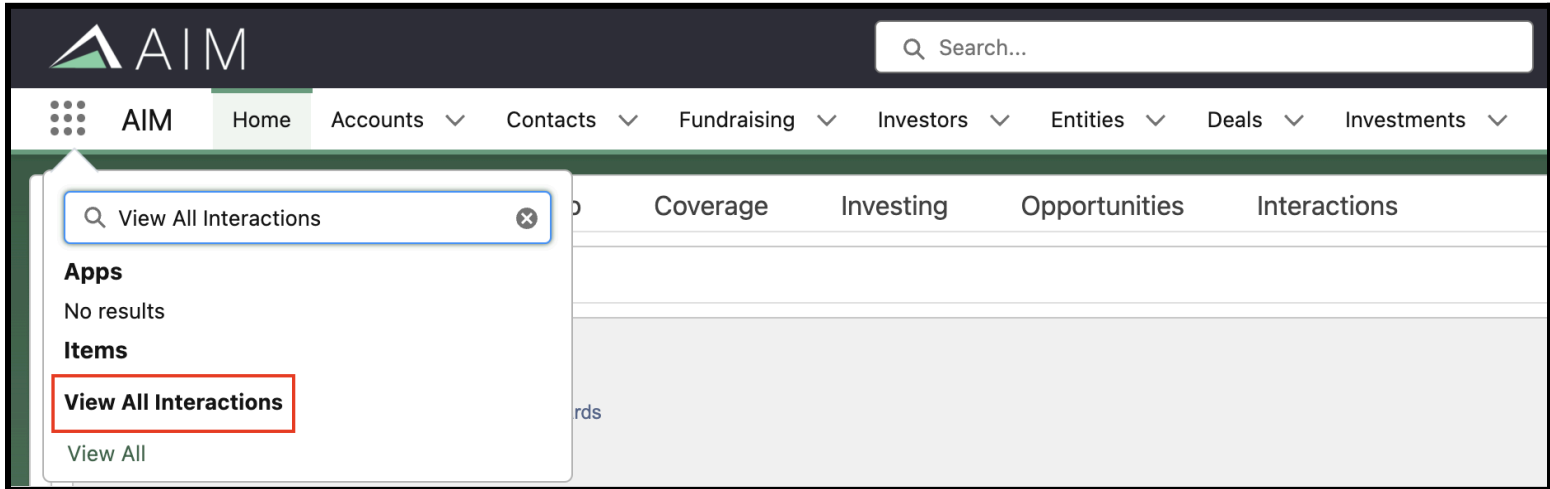
<input type="checkbox"/>	Interaction	Type	Date ↓	Reference Type	Interaction Owner
<input type="checkbox"/>	<a href="#">Send fund marketing materials</a>	Closed Task - Compl...	12/13/2023	Closed Task - Compl...	Watts
<input type="checkbox"/>	<a href="#">Meeting to Review Fund Materials</a>	Event	12/13/2023	Event	Watts
<input type="checkbox"/>	<a href="#">Call with Sara - Finishing analysis</a>	Call	11/3/2020	Cascade	Wojciak
<input type="checkbox"/>	<a href="#">Interaction with whomever</a>	e2sf	10/19/2020	e2sf	Wojciak
<input type="checkbox"/>	<a href="#">Initial Sourcing Call - Amount?</a>	Call	9/15/2020		Prod Admin
<input type="checkbox"/>	<a href="#">Test</a>	e2sf	7/28/2020	e2sf	Wojciak
<input type="checkbox"/>	<a href="#">Fwd: Data Structure and Sample</a>	e2sf	7/24/2020	e2sf	Wojciak
<input type="checkbox"/>	<a href="#">Test Event</a>	Event	5/27/2020	Event	Watts
<input type="checkbox"/>	<a href="#">Test Meeting</a>	Event	5/27/2020	Event	Watts
<input type="checkbox"/>	<a href="#">Test Interaction</a>	Call	5/26/2020	Cascade	Watts

**View All**

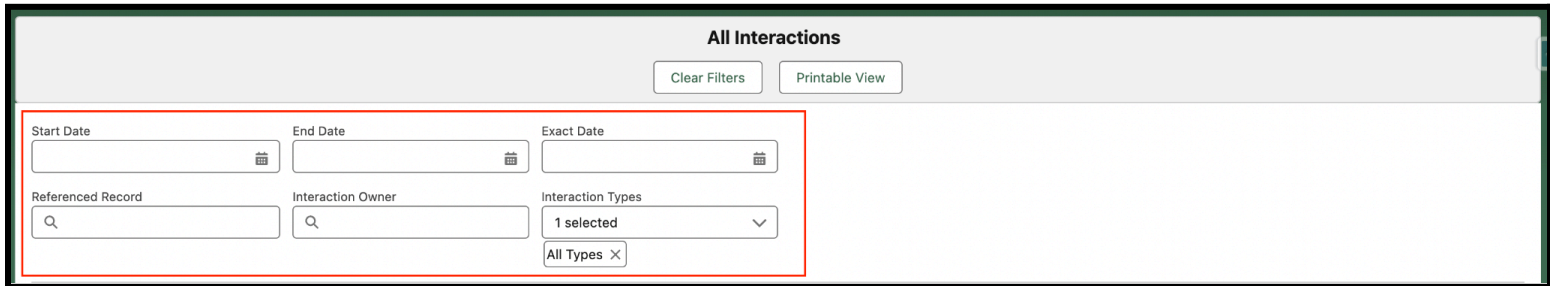


If users want to View All Interactions, including details, across multiple records, users can use the View All Interactions tab. For example, users might want to understand all meetings over the past 7 days, including meeting details and references.

To see all Interactions, click on the app launcher (9 dots in the upper left corner). Type "View All Interactions" and select the Item. This tab is also available to be added to the main navigation bar.

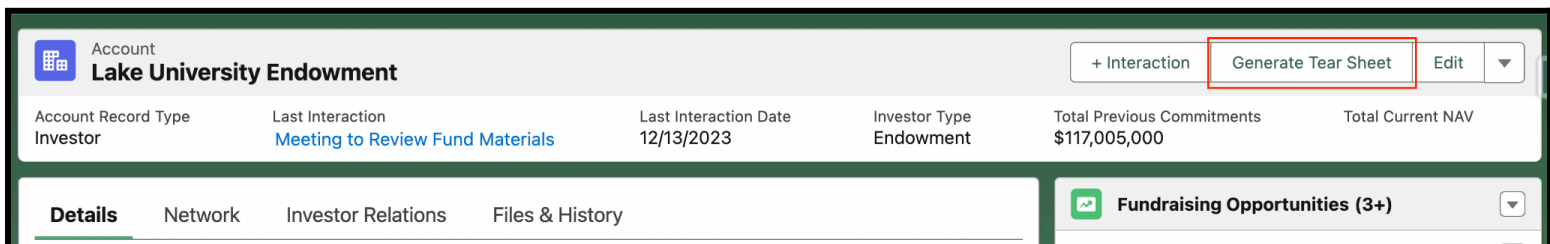


Users can add filters including Start Date, End Date, Exact Date, Referenced Record, Interaction Owner, and Interaction Type. Users are also able to click the 'Printable View' button to generate a print-ready PDF of all Interactions, including the details.



### **Recent Interactions on Tearsheets - Account**

You can access a print-ready tearsheet by clicking the 'Generate Tearsheet' button on the Account page. This will generate a tearsheet with Account details, related Contacts, Most Recent Interactions, and other relevant related lists. Tearsheets are an easy way to review Account information, including Interactions.





## How to Report On Interactions

Reporting on Interactions is an important tool to understand recent meetings, coverage, next steps, etc. Reports can be scheduled in AIM on a regular cadence and sent to Users via email. Common reports include:

- Interactions - Last Week
- Accounts where Last Interaction Date is greater than X days (e.g., Current LPs where Last Interaction Date is greater than 30 days)
- Coverage Reports (e.g. For the Accounts that I cover, who have not been contacted in the past 30 days)
- Interaction Count by Type

Report Types are key for creating Interaction reports. It's important to think about what information needs to be included in the Report.

If you need summary information, use the Last Interaction and Last Interaction Date fields. This allows you to use Report Types with each object as the base object of the report (e.g. Account). The Notes field is truncated in this view so that multiple rows of data appear. However, if the Report is exported to Excel, all data is visible.

Report: Accounts and Last Interaction Investors to Contact					
Account Name ↑	Last Interaction: Date	Last Interaction: Subject	Last Interaction: Notes	Last Interaction: Refer	
28 Knapp Investments	10/1/2021	Call w/ State of GA	Interested in a \$40M commitment to Fund V.	Knapp Investments, Pe	
29 Lake University Endowment	12/13/2023	Meeting to Review Fund Materials	Meeting to Review Fund Materials	Lake University Endowm	
30 Maple Peak Partners (Us)	11/11/2020	Email: Referral	Becky,  Thanks for the connection to the CEO. We recently did a fireside chat with them and reviewed preliminary numbers. Will keep in touch on where this goes.  Thanks!  Brie	Russell Equity, Maple Pe Aletto	
31 Mountain University Endowment	3/1/2023	Send PPM for Fund III	-	Mountain University Enc	
32 Murray Family	2/3/2023	Meeting	-	Jim Murray, Murray Fam	
33 NM PERA	9/24/2020	Call with Jackie about Historic Fund Performance	Spoke with Jackie about their appetite for investing and whether they would have interest in our latest Fundraise. She wants to understand our historic funds in more detail before making a decision or bringing it to the team.	NM PERA, Jackie Perez	
34 NYU Endowment	6/29/2022	Please Join Altvia	96  *{box-sizing:border-box}body{margin:0;padding:0}a[x-apple-data-detectors]{color:inherit!important;text-decoration:inherit!important}#MessageViewBody a{color:inherit;text-decoration:none}p{line-height:inherit}.desktop_hide,.desktop_hide table{mso-hide...	NextVentures, NYU End Andrew Everett, Andrew	

If you need detailed information on Interactions, use a Report Type that includes Interactions WITH Interaction References. Please contact [Altvia Support](#) if you need help with creating Reports and/or Report Types.



Report: Interactions with Interaction References

### Interaction with References

Trend Enable Field Edit

Interaction: Interaction Name ↑	Reference	Date	Summary
<input type="checkbox"/> Call: 2021 Projection (1)	True Fit	11/23/2020	Call with Jack Bryant at Mountain University Endowment for a peak into 2021 projections and to urge investing in next fund.
<b>Subtotal</b>			
<input type="checkbox"/> Call about deal (2)	Permian Resources	1/18/2019	-
	Aaron Smith	1/18/2019	-
<b>Subtotal</b>			
<input type="checkbox"/> Call about Fund III (2)	Colorado Funds, LLC	3/26/2019	Great call, add to pipeline
	Maple Partners III, L.P. - Colorado Funds, LLC	3/26/2019	Great call, add to pipeline
<b>Subtotal</b>			
<input type="checkbox"/> Call about Fund III opportunity (5)	Harvard Endowment	3/14/2019	Great call with Caroline, add fundraising opp to pipeline.
	Caroline Edmunds	3/14/2019	Great call with Caroline, add fundraising opp to pipeline.
	NYU Endowment	3/14/2019	Great call with Caroline, add fundraising opp to pipeline.
	Harvard Endowment - Fund IV	3/14/2019	Great call with Caroline, add fundraising opp to pipeline.
	Andrew Everett	3/14/2019	Great call with Caroline, add fundraising opp to pipeline.
<b>Subtotal</b>			

## Interactions Best Practices

Unlock the full potential of interactions for your organization by implementing a variety of effective best practices:

- **All Users Input Interactions** - Encourage all users to input their Interactions. This allows for more timely information into the system and gets users in the habit of leveraging and enhancing the data in AIM.
- **Use Descriptive Subjects** - Use specific Subject lines so that it's easy for users to understand information about the Interaction without having to click into the Interaction. For example, if the subject of all meetings is "Meeting", users need to click into the Interaction to understand who participated and what was discussed. A better subject would be "Conversation with Dion Almond to discuss interest in Fund VII".
- **Standard Processes** - As a team, define and agree to general processes for entering Interactions. For example, does every meeting get entered as an Interaction, who enters the notes after the meeting, how general or specific should the notes be, should References be created for only Accounts and Contacts or all records?
- **Leverage the Cascade Feature** - Always start the Interaction on a related record so that at least one Interaction Reference is automatically created. If possible, start on the related Contact so that the Contact and related Account Interaction References are automatically created.
- **Enter Meaningful Interactions** - AIM can get cluttered if you input thousands of Interactions that don't provide significant value. Be thoughtful about what information is entered and, if entering emails as Interactions (either through e2sf or an email plugin tool), wait until an email thread is 'complete' before logging it as an Interaction.