



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.



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.



- Touch** - The Touch field is used to record important Interactions (e.g., we had a meeting with State University Endowment). In situations where other records are referenced, it's important to capture the Reference but not record it as a Touch (e.g., we discussed White Family Investing but we did not meet with them). Touch can help report on Interactions.

Entering Interactions - Browser

You can create a new Interaction manually from any records on the following objects: Account, Contact, Entity, Deal, Fund, Fundraising, or Investor. To create a new Interaction, click on the *Log Interaction* button. We recommend creating an Interaction from one of the records you'd like to reference, by doing so, you'll automatically create that reference in addition to the interaction itself. This reference will also *cascade* to associated records if applicable.

 Contact Dion Almond		 Log Interaction		Move Contact	Edit	Delete	Clone	Add File
Account Name State University Endowment	Phone (303) 456-7891	Email demos+dion.almond@altvia.com	Last Interaction Meeting with Dion	Last Interaction Date 12/15/2024				

Within the Log Interaction workflow:

- Input interaction details within the available interaction record fields. If there are any fields that you would like added to this screen, please reach out to [Altvia Support](#).

Log Interaction

Source Record: Dion Almond

* Interaction Name

* Date

May 16, 2025

* Type

--None--

Summary

Interaction Notes

Salesforce Sans

12

B

I

U

Attach Files

Cancel

Save

2. Attach any document support for the interaction by using the *Upload Files* button
3. Related record tables will display any additional records that may be relevant for the interaction based on their relationship to the parent account record. If you would like to add any of these records as interaction references, simply select those records.

Log Interaction

✓ **Related Fundraising Records**

1 items • 0 items selected

🔍 Search this list...

<input type="checkbox"/>	Name	Entity	Stage	Commitment
<input type="checkbox"/>	State University Endow...	Fund I	Commitment Won	\$5,000,000.00

✓ **Related Investor Records**

1 items • 0 items selected

🔍 Search this list...

<input type="checkbox"/>	Name	Investor Legal Name	Entity Name	Commitment
<input type="checkbox"/>	State University Endow...	State University Endow...	Fund I	\$5,000,000.00

✓ **Related Entity Records**

1 items • 0 items selected

🔍 Search this list...

Cancel
Save

4. At the bottom of the pop-up, there is an additional table where you can review the interaction references that will be created alongside your interaction, along with the ability to update their reference type and any any additional notes about their involvement in the interaction.


✓ **Interaction References Added: 2**

Reference Name	Reference Object	Reference Type	Notes	Touch
Dion Almond Source	Contact	Participant ▼	<input style="width: 100%;" type="text"/>	<input type="checkbox"/>
State University Endow...	Fundraising	Referenced ▼	<input style="width: 100%;" type="text"/>	<input type="checkbox"/>



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.

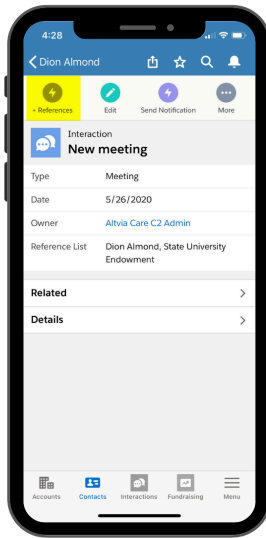
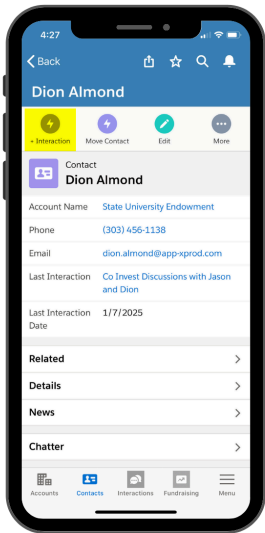

Interaction References
(2)

	Name	Reference Type	Notes	Touch
<div>Edit</div> <div>Delete</div>	State University Endowment (Account)	Cascade	Cascade from Dion Almond	<input type="checkbox"/>
<div>Edit</div> <div>Delete</div>	Dion Almond (Contact)			<input type="checkbox"/>

Add New Reference

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 Line 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

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

Interaction References

(2)

	Name	Reference Type	Notes	Touch
<div>Edit</div> <div>Delete</div>	<div>Christof Wojciak</div> (Contact)	Closed Task - Completed	Closed Task - Completed	<input type="checkbox"/>
<div>Edit</div> <div>Delete</div>	<div>Lake University Endowment</div> (Account)	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

Subject

Meeting to Review Fund Materials

Start

Date

Dec 13, 2023

Time

3:45 PM

End

Date

Dec 13, 2023

Time

4:45 PM

All-Day Event

☐

Name

Christof Wojciak

Related To

Lake University Endowment

Assigned To

Save

Interaction created from Event:

Interaction

Meeting to Review Fund Materials

Type

Date

Owner

Event

12/13/2023

Ryan Watts

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

System Information

Created By

Ryan Watts, 5/27/2020 9:02 AM

Last Modified By

MaplePeak Admin, 2/28/2024 9:57 AM

Interaction References

(2)

	Name	Reference Type	Notes	Touch
<div>Edit</div> <div>Delete</div>	Lake University Endowment (Account)	Event	Cascade from Christof Wojciak	<input type="checkbox"/>
<div>Edit</div> <div>Delete</div>	Christof Wojciak (Contact)	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.

PPMs

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

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

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

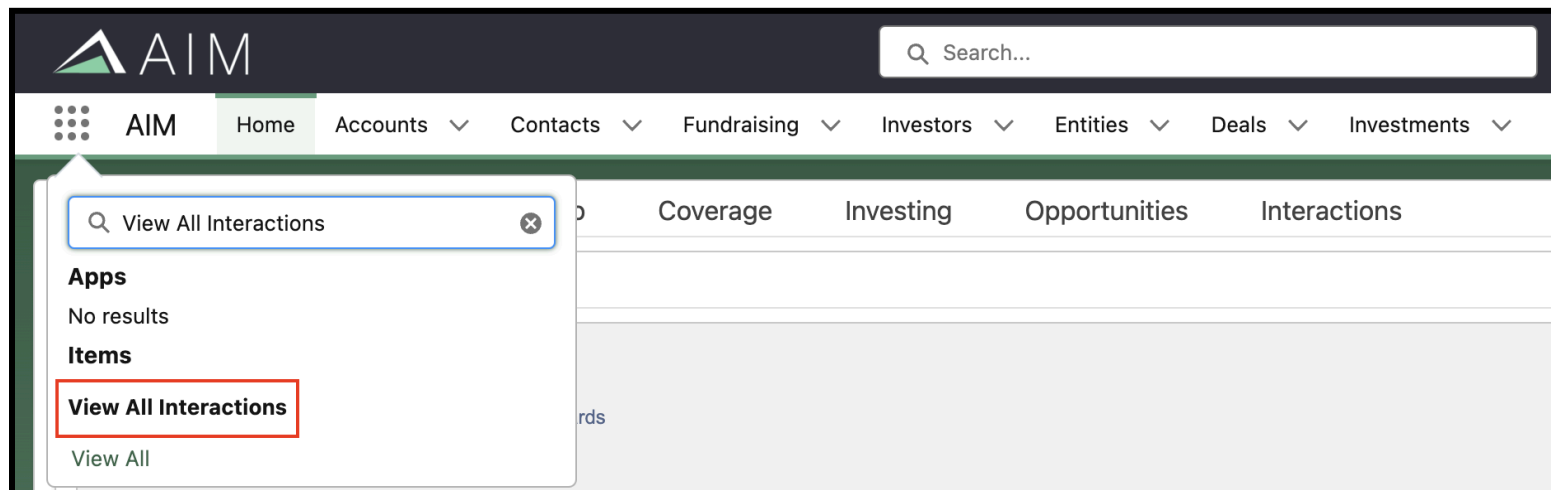
10+ items • Sorted by Date • Updated a few seconds ago

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

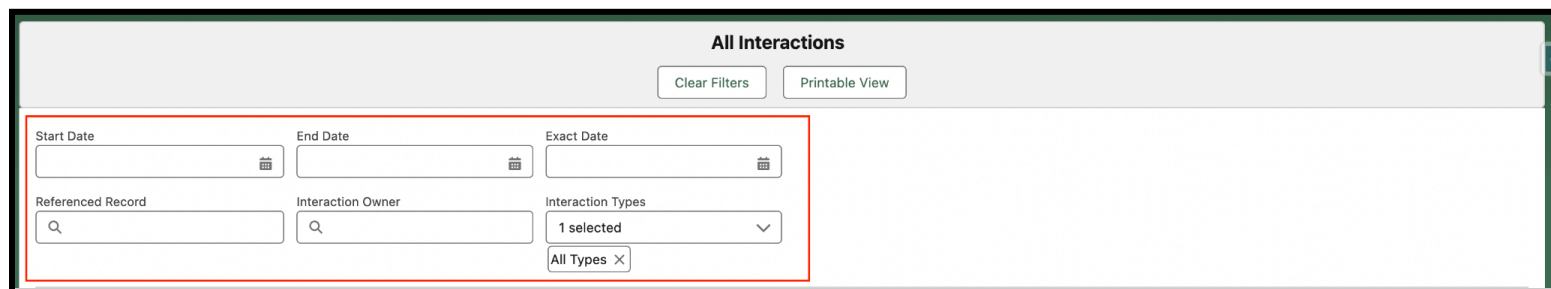
View All

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.

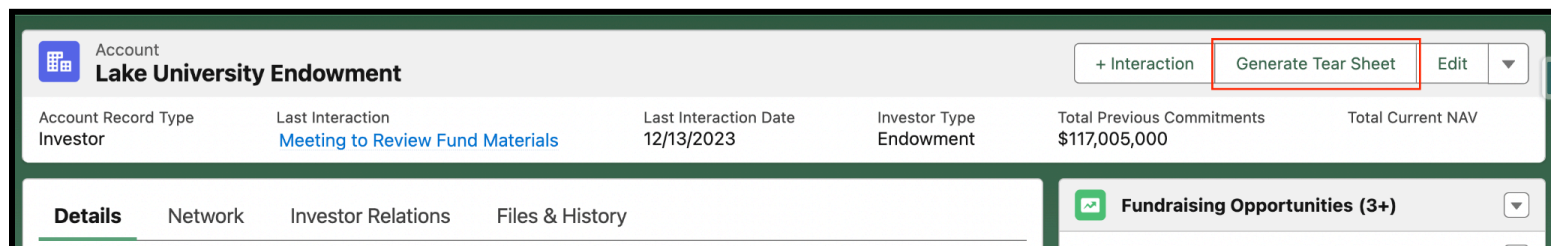


Users can add filters including Start Date, End Date, Exact Date, Referenced Record, Interaction Owner, and Interaction Type. Users are also able to click the 'Printable View' button to generate a print-ready PDF of all Interactions, including the details.



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					
Trend Enable Field Editing Q Add Chart Filter Edit					
	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, Pek
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 End
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

Trend
Enable Field Edit

Interaction: Interaction Name ↑	Reference	Date	Summary
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.
Subtotal			
Call about deal (2)	Permian Resources	1/18/2019	-
	Aaron Smith	1/18/2019	-
Subtotal			
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
Subtotal			
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.
Subtotal			

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.