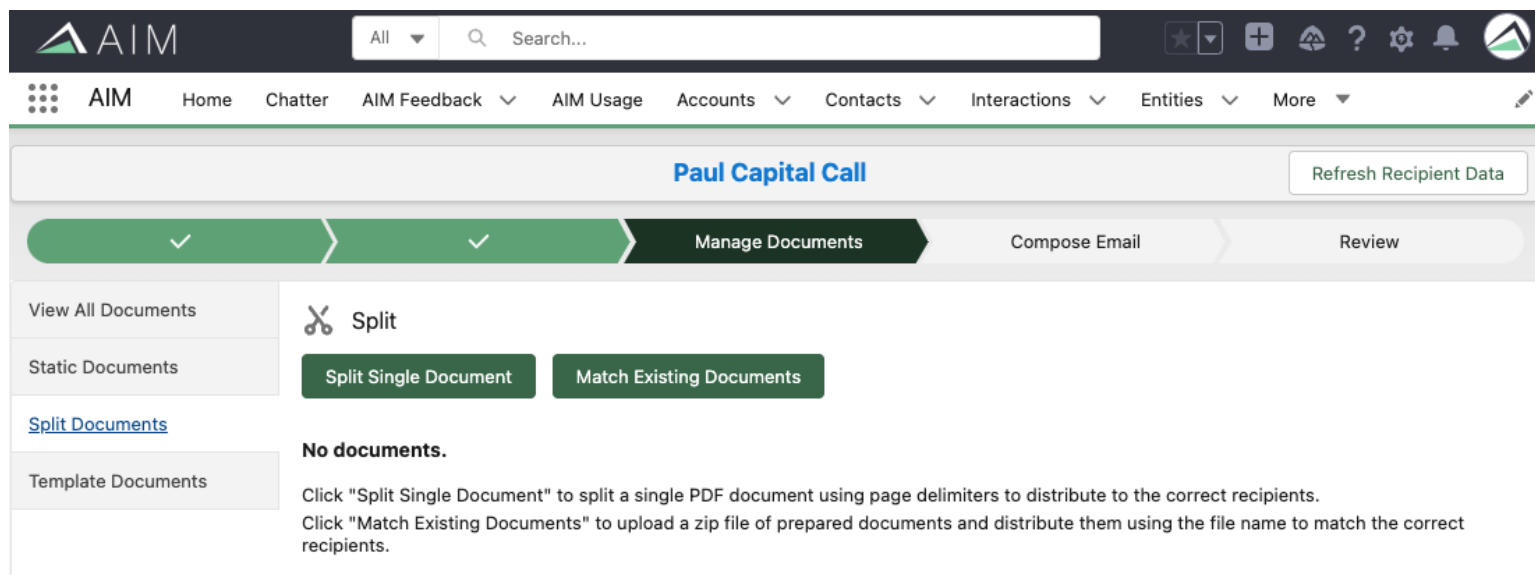# Match By Filename - IC - User Guide

There are three batch-wide document types that Investor Correspondence allows you to send: static documents, split documents, and template documents. Within the split documents batch type there are two options for distributing documents.

Investor Correspondence > Manage Documents > Split Documents:

- **Split Single Document**
  - Correspond's document split single document functionality separates one PDF document into multiple PDFs, essentially assigning different sections of the original file to different Investors. The maximum file size for a PDF to be split is 200 MB.

- **Match Existing Documents (Match By Filename)**
  - Correspond's match existing documents functionality takes a zip file containing any number of files/file types and uses the filenames of each individual file to match with the correct Investors (Recipients).
  - This feature supports common file types including pdf, docx (word documents), and xlsx (excel files). This is not an exhaustive list of what file types it supports.
  - Multiple files of the same or different types going to the same Investor (Recipient) is supported

Match Existing Documents (Match By filename)
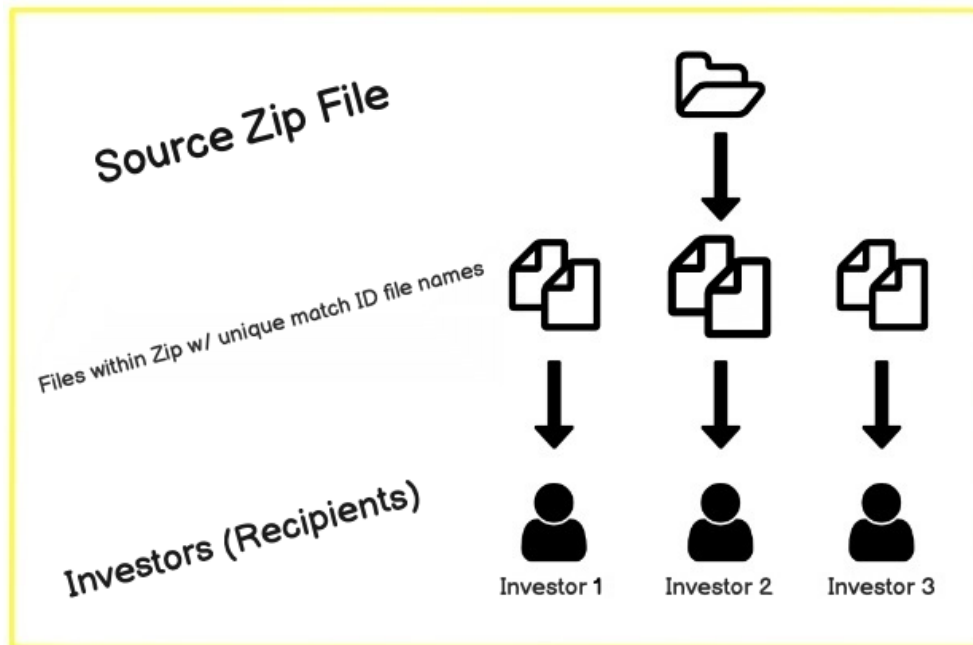
Before you Match By filename

The Investor Correspondence Match Existing Documents feature is capable of ingesting a single Zip file parsing through the filenames, reading each filename and file type, and matching each file to corresponding investors for distribution.

It does so by reading the match ID found within the filename of each file and correlating to the corresponding investors from within AIM.

A desired Match ID can be configured in your AIM org with the help of Implementation or Support on the Investor Correspondence Object.

It is important to properly create the zip file containing files and format the filenames held within to identify which files correspond to which investor(s) and the Match ID chosen in AIM.

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 excel files (additional files supported)
- Files within the zip should have a consistent filename structure (see below)

filename Structure

- filenames should be formatted to always include a desired Match ID that is found within AIM.
- 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 distributed to the same investor.
- Multiple files of the same name regardless of file type will be matched with a single investor based on the Match ID

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 fields are left blank the tool will assume that the Match ID is the entire filename.

- **Delimiter Start (optional):**

- Tells Investor Correspondence to begin looking for the chosen Match ID.
- If the Delimiter Start Field is left blank and Delimiter End Field is filled in, it is assumed the filename STARTS with 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 "Paul V" in the filename and then stop reading the filename when it finds "-"
- **Delimiter Start**: Blank/Empty
- **Delimiter End**: - (DASH)
- **Delimiter MatchID:** Investor Name
- **filename within Zip:** Paul V-Tax_Document.PDF

- **Delimiter End (optional):**
  - Tells Investor Correspondence 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 "Paul V" in the filename and when it finds the first instance of "-" and will ignore everything before it "2022_k1_document".
- **Delimiter Start**: - (DASH)
- **Delimiter End**: Blank/Empty
- **Delimiter MatchID:** Investor Name
- **filename within Zip:** 2022_k1_document-Paul V.PDF

- **Using Both Start and End Delimiters**
    - Tells the Investor Correspondence that the match ID is between the start and end chosen delimiters

Example: In this example, the tool will read the filename to find the first instance of "-", find the match ID, and then end when the second instance of "-" is found.

- **Delimiter Start**: - (DASH)
- **Delimiter End**: - (DASH)
- **Delimiter MatchID:** Investor Name
- **filename within Zip:** 2022_k1_document-Paul V-950000.PDF

- **Match ID (Required):**
    - Unique identifier 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.
    - **PLEASE NOTE** - Match IDs should NOT contain a character that is also chosen as a delimiter

Renaming Files, Investor Legal Name, Remove Delimiters, ShareSecure Categories

Rename Files - Field
- Entering a name into this field will rename each file as desired. As an example, if you wanted to name each file within the zip file to something generic.
  - Example: k1_2022.pdf
- You may leave this field blank. If you do so, each file within will retain its original filename from the zip folder.

Append Investor legal name to filename - Checkbox
- This box is checked by default. Leaving the "Appended Investor Legal Name To Each filename" checkbox checked will append the investor legal name to the end of any filename regardless of whether or not you chose to rename the files or not. Uncheck the box if you DO NOT want to append the investor's legal name to the filename.

Remove Delimiters and Match ID from filename - Checkbox
- This box is checked by default and will remove the chosen delimiters and match ID from the filename and leave everything else from the existing filename structure. Uncheck this box to leave the name as is. If you choose to rename the file then this box will be unavailable as an option.

ShareSecure Categories - Field
- You can also assign ShareSecure categories that will be applied only to the files distributed from the zip folder you uploaded.
- Your batch name, investor legal name, and record type have been added as categories automatically to all documents in this batch, so no need to add them manually here.

Results Preview Screen

The results preview screen is very similar to the results preview screen of the original Split Single Document feature with the following differences:

- **Generate Full Batch PDF Button**
  - This button will ONLY batch together the PDF files found within the files ready to be distributed. If no PDF files exist to be distributed then the tool will show an error when the button is pressed.
- **Documents Column**
  - Will show files other than PDF since the Match Existing Documents feature can parse through and distribute other file types such as .docx and .xlsx. Individual documents can still be added on a one off basis per investor.

✂ Split

View All Documents

Static Documents

Split Documents

Template Documents

| Split Single Document | Match Existing Documents |

Name		
K1_Tax_Document_2022.zip	View	Delete

Click "Split Single Document" to split a single PDF document using page delimiters to distribube to the correct recipients.
Click "Match Existing Documents" to upload a zip file of prepared documents and distribute them using the file name to match the correct recipients.

Preview Documents

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

🔍 Search recipients...

Showing 1-100 of 100 records.

Investor	Document	Document Type	Categories	
Investor1 (+ Add Document)	K1_Tax_Document_2022_Investor_Legal_Name_1.xls	Split	Capital Call, a0pR000000BS3v2, Investor Legal Name 1	🗑
	K1_Tax_Document_2022_Investor_Legal_Name_1.pdf	Split	Capital Call, a0pR000000BS3v2, Investor Legal Name 1	🗑
Investor10 (+ Add Document)	K1_Tax_Document_2022_Investor_Legal_Name_10.xls	Split	Capital Call, a0pR000000BS3v2, Investor Legal Name 10	🗑
	K1_Tax_Document_2022_Investor_Legal_Name_10.pdf	Split	Capital Call, a0pR000000BS3v2, Investor Legal Name 10	🗑
Investor100 (+ Add Document)	K1_Tax_Document_2022_Investor_Legal_Name_100.xls	Split	Capital Call, a0pR000000BS3v2, Investor Legal Name 100	🗑
	K1_Tax_Document_2022_Investor_Legal_Name_100.pdf	Split	Capital Call, a0pR000000BS3v2, Investor Legal Name 100	🗑