



Multi-Entity Batch 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: Multi-Entity Batch

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.
- **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.

Sending a Batch

Prerequisites for Sending a Batch

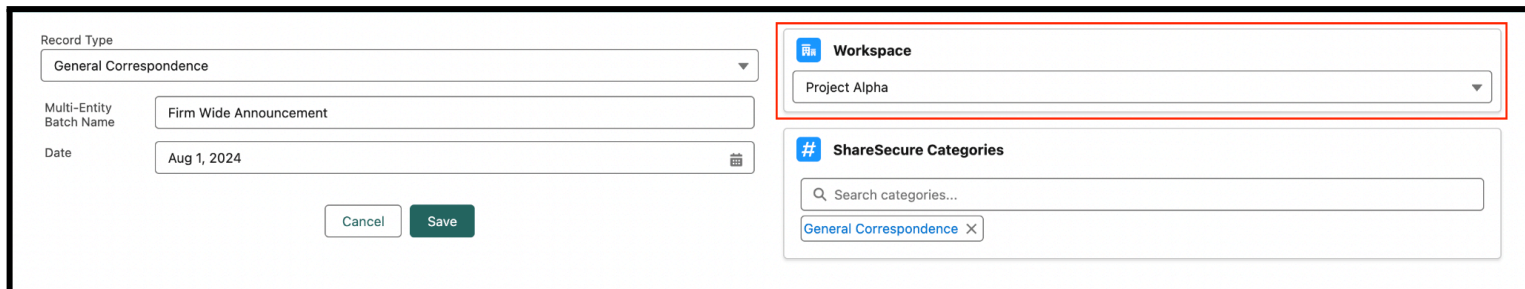
To send a Multi-Entity Batch, you'll need to ensure that the following conditions have been met. Please don't hesitate to [reach out to the Altvia Care team](#) if you're unsure about any of them:

- 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.

Batch Details and Categories

Start the batch from the Investor Correspondence Tab within AIM, under the 'Multi-Entity Batch' section.

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



The screenshot shows a form for creating a Multi-Entity Batch. On the left, there are three input fields: 'Record Type' with a dropdown menu set to 'General Correspondence', 'Multi-Entity Batch Name' with the text 'Firm Wide Announcement', and 'Date' with a calendar icon and the date 'Aug 1, 2024'. Below these fields are 'Cancel' and 'Save' buttons. On the right, there are two sections: 'Workspace' with a dropdown menu set to 'Project Alpha', and 'ShareSecure Categories' with a search bar and a tag for 'General Correspondence'.

- **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.

Select Recipients

The next step of the Multi-Entity batch creation process will require the input of Entities that should be included within the batch, using the *Add Entities* lookup component. Once all desired Entity records have been added, using the *Generate Recipients* button will create recipients for the Multi-Entity Batch.

Add Entities

Generate Recipients

Maple Partners VIII, L.P. ✕

Maple Partners X, L.P. ✕

- **Recipients with Correspondence:** Any recipient that has an Investor Contact tied to an Investor that is associated with one of the Entity records selected. At least one of the potential many Investor Contacts related to one Recipient needs to have ShareSecure or Email preferences for the selected Correspondence Type of the Multi-Entity Batch.
- **Recipients without Correspondence:** Any recipient whose Investor Contact(s) do not have ShareSecure or Email selected for the selected Correspondence Type of the Multi-Entity Batch.

Add Entities

Generate Recipients

Maple Partners X, L.P. ✕

Maple Partners VIII, L.P. ✕

Correspondence Type: General Correspondence **Save and Continue**

Recipients With Correspondence
Recipients Without Correspondence

Showing 1-4 of 4 records.

RECIPIENT	EMAIL	RELATED INVESTORS	<input checked="" type="checkbox"/> SHARESECURE DELIVERY	<input checked="" type="checkbox"/> EMAIL DELIVERY
Cole Maltese	cole+test1@altvia.com	View Investors	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Finn Ijjas	jeff.ijjas+finn@altvia.com	View Investors	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Hannah Test User	hannah+mpv2@altvia.com	View Investors	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Rosey LaRose	demos+rosey@altvia.com	View Investors	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Showing 1-4 of 4 records.

Recipients and their respective delivery methods can be updated directly within the table for the Multi-Entity Batch. Ensure that after you adjust any delivery methods that you press the *Save Changes* button!

****Note:** Updating delivery methods within the Multi-Entity Batch workflow does not update any Preferences on underlying Investor Contacts & Preferences. The updates are being made for the current batch and nothing else.

Within the Recipients table for each Recipient, there is an option to view the related Investors, this provides clarity on why a specific recipient was pulled into the batch and how delivery methods were decided upon.



Search Entities Generate Recipients

Related Investors for Rosey LaRose

Investor Name	Entity Name	Correspondence Type	ShareSecure	Email
Maple Partners X - Alaska Permanent Fund Corporation	Maple Partners X, L.P.	General Correspondence	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Maple Partners VIII, L.P. - Stark Industries	Maple Partners VIII, L.P.	General Correspondence	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Showing 1-2 of 2 records. Close

Manage Documents

Static Documents are currently the only document type that is supported by Multi-Entity Batches. A description of a static document can be found below:

- Static Documents:** Static documents are documents that do not contain any information that varies among Recipients, so each Recipient 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.

You can upload documents either by navigating to their individual tabs or using the *Add Document* button on the **View All Documents** tab.

Workspace: Project Alpha Firm Wide Announcement

✓ ✓ **Manage Documents** Compose Email Review

[View All Documents](#)

[Static Documents](#)

📄 All Documents

Add Document

No documents.

Select a tab at left to upload documents.

Static Documents

Static documents will be shared with all batch recipients (unless you manually remove them from certain recipients). 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. Additionally, you can assign specific ShareSecure categories that will be applied only to this document within the batch.

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

or

Document Options

Document Name

Make Document(s) Read Only in ShareSecure

Watermark Template
Choose a PDF document to enable watermarking.






ShareSecure Categories

One-Off Recipient-Specific Documents

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

Preview Documents

Showing 1-5 of 5 records.

Recipient	Email	Document	Document Type	Categories	
Cole Maltese + Add Document	cole+test1@altvia.com	Document 1.pdf	Static	General Correspondence	
Finn Iijas (+ Add Document)	jeff.ijias+finn@altvia.com	Document 1.pdf	Static	General Correspondence	
Hannah Test User (+ Add Document)	hannah+mpv2@altvia.com	Document 1.pdf	Static	General Correspondence	
Rosey LaRose (+ Add Document)	demos+rosey@altvia.com	Document 1.pdf	Static	General Correspondence	
Theresa Walker (+ Add Document)	demos+theresawalker@altvia.com	Document 1.pdf	Static	General Correspondence	

Showing 1-5 of 5 records.

Compose Email

During this step of the Multi-Entity Batch process, you'll indicate whether you'd like to send a direct email as part of your batch.



Workspace: Project Alpha Firm Wide Announcement

Compose Email Review

Send Email? Yes ?

From Address

Template

[Manage Email Templates](#)

Email Body Merge Fields Copy and paste into editor

Subject ?

B I U
[List Icons]
[Link Icon]
[Text Icon]

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:

Template

[Manage Email Templates](#)

Email Body Merge Fields Copy and paste into editor

Correspond: Investor Edition allows users to create Email Templates that can be reused across Multi-Entity 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

	Name	Subject
Edit Delete	General Notification	General Notification from Maple Partners

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,

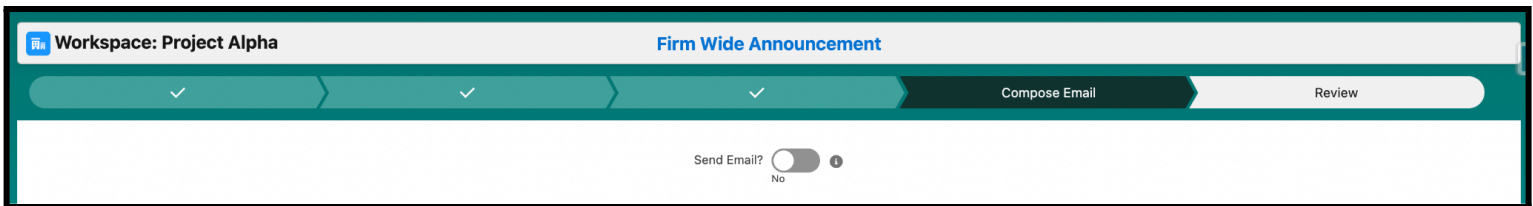


none of the documents generated or uploaded in the previous steps will be attached to direct emails that the recipients receive.

- **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).



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:

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

Recipients Receiving Correspondence					
Recipient	Document Type	Document	Categories	Delivery Methods	
Cole Maltese (cole+test1@altvia.com)	Static	Document 1.pdf	General Correspondence	Email, Sharesecure	Preview Email
Finn Iijas (jeff.ijias+finn@altvia.com)	Static	Document 1.pdf	General Correspondence	Email, Sharesecure	Preview Email
Hannah Test User (hannah+mpv2@altvia.com)	Static	Document 1.pdf	General Correspondence	Email, Sharesecure	Preview Email
Rosey LaRose (demos+rosey@altvia.com)	Static	Document 1.pdf	General Correspondence	Email, Sharesecure	Preview Email
Theresa Walker (demos+theresawalker@altvia.com)	Static	Document 1.pdf	General Correspondence	Email, Sharesecure	Preview Email



- Recipients Without Correspondence:** These are Recipients that will not be receiving correspondence from this batch. This could be caused by Investor Contacts without Correspondence Preferences for your selected batch type or by the Recipients having been manually unchecked on the Select Recipients tab.

Fund I Capital Call - November 2023 Refresh Recipient Data

Review

Correspondence Details

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

Investors Receiving Correspondence Investors Who Won't Receive Correspondence

Search recipients...

- 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:** Recipients who appear in this tab have Correspondence Preferences to receive your message via email, but they're missing an email address. (This tab does not appear unless you have chosen to send an email and have email recipients without an email address.)

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).

Workspace: Project Alpha **Firm Wide Announcement**

Review

Correspondence Details

Name	Firm Wide Announcement	Individual Recipients	5
Correspondence Type	Multi-Entity Batch	Documents	1
Created At	8/1/2024, 1:30:34 PM	Categories	General Correspondence
Status	Unsent		

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.



Workspace: Project Alpha Firm Wide Announcement

Review

Remove Drafts from ShareSecure View In ShareSecure Confirm & Deliver

Correspondence Details

Name	Firm Wide Announcement	Individual Recipients	5
Correspondence Type	Multi-Entity Batch	Documents	1
Created At	8/1/2024, 1:30:34 PM	Categories	General Correspondence
Status	Drafts sent		

Confirm & Deliver

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

Workspace: Project Alpha Firm Wide Announcement

Review

Remove Drafts from ShareSecure View In ShareSecure Confirm & Deliver

Correspondence Details

Name	Firm Wide Announcement	Individual Recipients	5
Correspondence Type	Multi-Entity Batch	Documents	1
Created At	8/1/2024, 1:30:34 PM	Categories	General Correspondence
Status	Drafts sent		

Using the Delivery Report

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

Workspace: Project Alpha Firm Wide Announcement

Review

Home View in ShareSecure Export to Excel

ShareSecure Deliveries

Delivered: 4
Failed: 1

ShareSecure Views

Viewed: 0
Partial View: 0
Not Viewed: 4

Email Deliveries

Delivered: 5
Pending: 0
Failed: 0

Email Opens

Opened: 3
Unopened: 2

Delivery Report Failures Batch Details

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

How many recipients can be included in a single batch?

A single batch can include up to 1000 individual recipients.

Is there a limit to the number of Entities that can be added to a Multi-Entity Batch?

Not necessarily, it's more about the number of recipients (Investors Contacts) that are pulled in for each Entity and how that impacts the limit of 1000 individual recipients within the batch.

Are Split Documents supported for Multi-Entity Batches?

Not yet, currently only Static documents are supported for Multi-Entity Batches

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

100 MB for ShareSecure Only deliveries.

10 MB if the Batch includes a direct email being sent.

Can I send a Multi-Entity Batch without any documents attached?

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

Is there any impact to underlying Investor Contacts & Preferences by updating the Delivery Preferences within the Multi-Entity Batch?

No there is not, any updates that are made within the process of a Multi-Entity Batch will only impact that single batch and will not update the underlying correspondence preference data for a given recipient.

How are Correspondence Preferences handled within a Multi-Entity Batch?

Correspondence Preferences are "combined" across Investors Contact for a given recipient.

- Ex. Contact has Investor Contact 1 related to Entity A and Investor Contact 2 related to Entity B. Investor Contact 1 is set to receive General Correspondence via ShareSecure ONLY while Investor Contact 2 is set to receive General Correspondence via Email ONLY. This will result in the Recipient within the Multi-Entity Batch to have both ShareSecure & Email selected for delivery methods for a General Correspondence Multi-Entity Batch.

What if an Investor Contact has an override email set for a specific Entity record?

If a recipient has an override email set on one of their Investor Contacts, the email input in the Override Email field will be considered as a separate recipient within the Multi-Entity Batch for direct email purposes.

- For ShareSecure Deliveries, those will still be shared with the related ShareSecure user associated with the Contact record for the Investor Contact.