# ShareSecure Admin Updates

Overview

We're excited to introduce enhancements to ShareSecure's admin experience, designed to offer our admin users a more intuitive and customizable experience. These updates will streamline workflows, improve navigation, and provide enhanced customization options, enabling fund administrators to create unique portal experiences that boost LP engagement and loyalty.

These admin enhancements also pave the way for other key updates on our roadmap, such as Investor Landing Pages.

What's New for ShareSecure Admins Starting July 23, 2024:

- **Date:** On Tuesday, July 23, you will have access to the new admin experience.
- **End User LP Portal Interface:** This update does not affect your stakeholders' portal interface.
- **Toggle Feature:** Starting on July 23, you will see a toggle labeled "New Experience" at the top of the ShareSecure application. This allows you to switch back to the standard ShareSecure experience at any point.
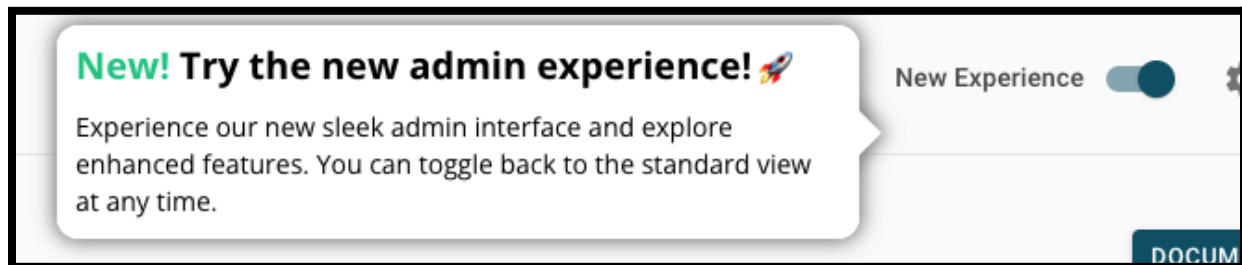
What Does This Mean for You?

- Increased productivity and improved organization of your document handling.
- Greater flexibility in how you view, manage, and share your ShareSecure data.
- Ability to toggle back to the standard ShareSecure experience at any point.
- Ability to upgrade to future ShareSecure enhancements.

New Admin Functionality:

- **Customizable Columns & In-Line Editing:** Modify column displays to fit your needs and in-line edit fields directly within ShareSecure.
- **Flexible Data Exports:** Export specific data points of your choosing for more tailored and efficient reporting.
- **Newly Added CRM Data:** Enjoy new contextual column selections for Entity, Investor Legal Name, and Document Type, providing deeper insights and context to documents related to specific AIM records.
- **Advanced Filtering:** Improve the accuracy, organization, and overall management of documents with enhanced search and filter capabilities.
- **Bulk Editing:** Save hours of admin work and edit at scale with the new bulk-edit functionality.
- **Simplified Navigation:** We have improved the layout of the admin interface to be more intuitive to navigate through documents, users, and groups all within a single view.

Next on the Q3 Roadmap…

- **New Landing Page Builder:** The landing pages feature for ShareSecure aims to enhance investor engagement and satisfaction by providing a personalized, branded, and interactive experience. This feature allows admins (General Partners in Private Equity, Venture Capital, and Real Estate Funds) to create and manage landing pages tailored to investors' needs, offering transparency, document management, and real-time updates. Investors will benefit from an intuitive interface that provides clear and relevant investment information.
(*This is a premium feature within ShareSecure that will require an additional cost.)

Overview FAQs

ShareSecure Admin Overview Enhancements Q/A

Overview

- **Q: Do these admin enhancements impact end users/LPs?**
  - A: No. Your key stakeholders will have the same end user experience in ShareSecure.
- **Q: What is the purpose of the new enhancements to ShareSecure's admin experience?**

- ○ A: The enhancements are designed to offer admin users a more intuitive and customizable experience, streamline workflows, improve navigation, and provide enhanced customization options.
- **Q: How do these admin enhancements relate to ShareSecure's roadmap?**
  - ○ A: These enhancements pave the way for other key updates on the roadmap, such as landing pages and dashboards.
- **Q: What new capabilities do admins have regarding columns, data exports, and in-line editing?**
  - ○ A: Admins can now modify column displays, select specific data for export, and update fields directly through in-line editing.
- **Q: What new fields are available from contextual CRM data?**
  - ○ A: New column options include Entity, Investor Legal Name, and Document Type, providing deeper insights and context for documents related to specific AIM records.
- **Q: What improvements have been made to filtering and bulk edit capabilities?**
  - ○ A: Enhanced filtering and bulk editing capabilities improve the accuracy, organization, and overall management of documents, promoting GP self-service and a better user experience.
- **Q: Will the new application work with AIM/ Investor Correspondence and ShareSecure?**
  - ○ A: Yes - workflows between AIM and ShareSecure will work as expected.