



Correspond Mailings User Guide

Altvía's Correspond Mailings is a mass email tool specifically designed to leverage contact data within the CRM, build smart mailing lists, and always keep mailings up to date with the most accurate contact information.

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Getting Started: Correspond Mailings

Object Glossary

- **Correspond:** The communication hub within Altvia's platform, where you can manage mailings, document generation and distribution (capital calls, docs, etc.), PPMs, and Multi-Entity Batches.
- **Mailings:** Altvia's mass email marketing and communication tool, enabling the creation and distribution of large-scale emails to investors, stakeholders, or other contacts.
- **Recipients:** Individuals or entities that are targeted in a mailing.
- **Mailing Lists:** Existing lists of contacts created within Correspond that you can add to a mailing.
- **Templates:** Pre-built, customizable formats used to streamline the creation of common communications. There are two options: text-only templates (standard email) and HTML templates (more visually dynamic emails created via a drag-and-drop editor).

Sending a Mailing

Prerequisites for Sending a Mailing

To send a Mailing, 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:

- For VDR/Portal deliveries: The user who will be preparing and sending your Mailing is a VDR/Portal administrator whose API key has been correctly configured within the CRM and has permission to publish documents in VDR/Portal.

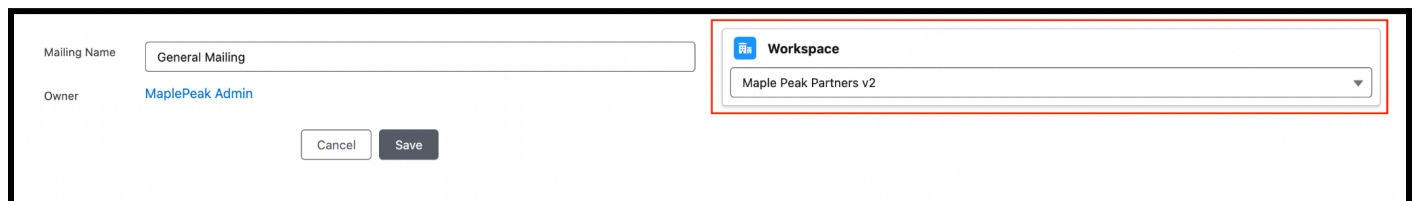
Mailing Details

You can start a Mailing from the Correspond tab:

- Ensure that *Mailings* is selected within the left hand navigation and then press *New*.
- Fill out Mailing details: Input the name of the Mailing, this will be an internal name to reference the mailing, this does not impact the subject of the email being sent.

If you have multiple VDR/Portal Workspaces, select the relevant workspace to send documents within the Mailing to, this will impact the VDR/Portal delivery statistics depending on which workspace is selected.

- A workspace must always be selected, however, if you only have one available workspace or are not a VDR/Portal client, then this option will be automatically selected for you.



The screenshot shows a form for creating a mailing. It includes a 'Mailing Name' field with the value 'General Mailing', an 'Owner' field with the value 'MaplePeak Admin', and a 'Workspace' dropdown menu with the selected value 'Maple Peak Partners v2'. There are 'Cancel' and 'Save' buttons at the bottom.

Select Recipients

The next step of the Mailing creation process focuses on adding recipients to the Mailing from your CRM contact data. There are 4 distinct ways that you can add recipients to a Mailing.

- Mailing Lists
- Reports
- File Upload

- Individually

After any of these options are used within a Mailing, the source for recipients being added to the Mailing will show up within the *Recipient Sources* component. Multiple sources can be used to add recipients to a Mailing, even if some contacts overlap between the different sources, we will de-duplicate the recipients based on email address ensuring no duplicate email addresses are found within the recipient list.

Mailing Lists

If you have existing lists of contacts created within Correspond, then you will use this option to add that list of contacts as recipients to the Mailing.

If any new Mailing Lists need to be created, that can be done back within the Correspond tab under the *Mailings* section. Within the right hand side, there is an option to switch the view to Mailing Lists and create new ones.

Reports

Utilizing CRM reports to source recipients is also possible within a Mailing, this option will prompt a search for a specific report that already exists within the CRM. Once selected, a preview of the contacts being pulled in as recipients will display.

- The report must contain the Contact ID of the contact record in order to be successful.

Select Report

Report

Colorado Contacts X

Report Results (125)

Search rows...

Contact ID	Email	First Name	Last Name	Mailing State/Province
0036A00000gEtDT	demos+dan.king@altvia.com	Dan	King	Colorado
0036A00000gEtDX	demos+phil.wiland@altvia.com	Phil	Wiland	Colorado
0036A000005q3oz	demos+daniel.mckinnon@altvia.com	Daniel	Mckinnon	Colorado
0036A000005q3p4	demos+carolina.webster@altvia.com	Carolina	Webster	Colorado
0036A000005q3pB	demos+ingrid.hooper@altvia.com	Ingrid	Hooper	Colorado
0036A000005q3pG	demos+tad.nixon@altvia.com	Tad	Nixon	Colorado
0036A000005q3pI	demos+mark.lucas@altvia.com	Mark	Lucas	Colorado
0036A000005q3pK	demos+giselle.norton@altvia.com	Giselle	Norton	Colorado
0036A000005q3pq	demos+beth.busenhart@altvia.com	Beth	Busenhart	Colorado
0036A000005q3pu	chris@altvia.com	Chris	Wojciak	Colorado
0036A000005q3oo	demos+sean.cahill@altvia.com	Sean	Cahill	Colorado
0036A000005q3pS	demos+jason.viado@altvia.com	Jason	Viado	Colorado
0036A000005q3pU	demos+riley.morris@altvia.com	Riley	Morris	Colorado
0036A000005q3pd	demos+channing.tanner@altvia.com	Channing	Tanner	Colorado

Save

File Upload

Recipients may also be imported into a Mailing from a file upload. Once the file has been uploaded, depending on the file type, you'll be asked to select the specific sheet to reference (for XLSX files) along with which column in the file correlates with the Contact ID of contact records found in the CRM.

- Supported file types include CSV & XLSX
- File must contain the Contact ID for a successful import

Upload Recipients

Upload CSV or XLSX file

Upload Files

Or drop files

Please upload your CSV or XLSX file containing Contact Ids. Once uploaded, you will be asked to select which column within the file correlates to the Contact Id in AIM.

* Sheet name

Colorado Contacts

* Contact Id matches to

Contact ID

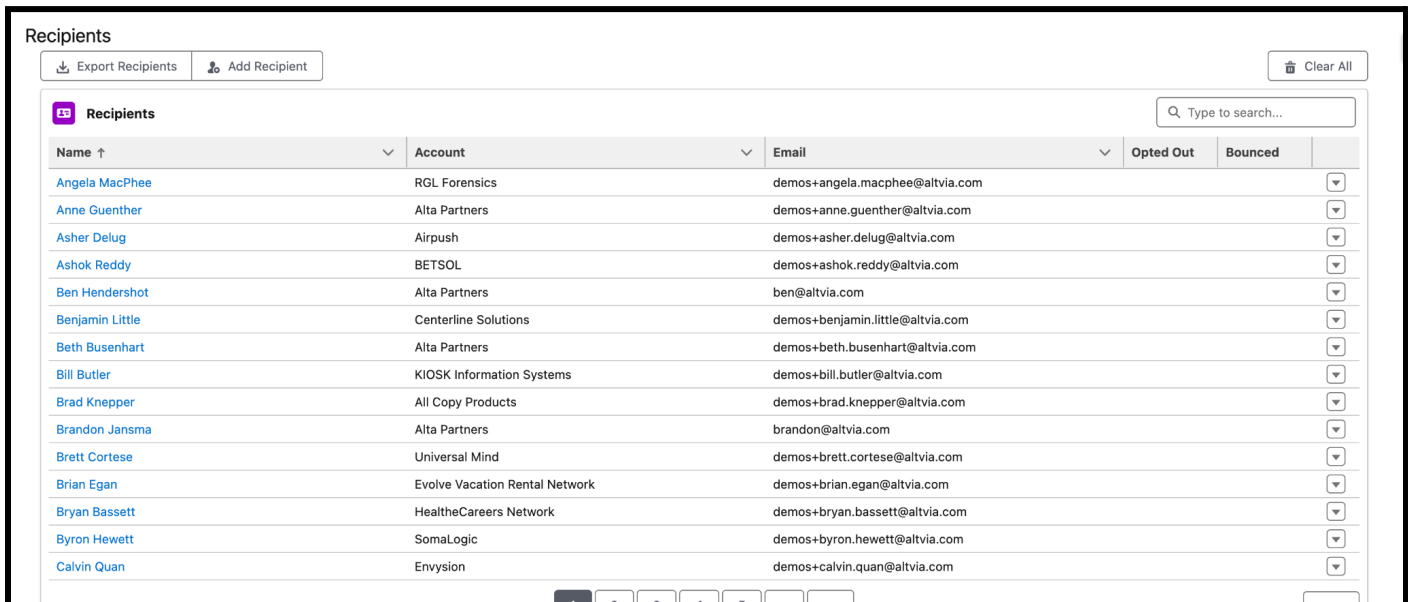
Confirm & Upload

Individually

Contacts may also be searched individually in order to add them to the Mailing, this can be done by using the *Add Recipient* button. Once pressed, a search component will display where the contact can be searched by name.



Once all recipient/recipient sources have been added to the Mailing, they will display within the Recipients portion of the step. The recipients will be displayed in a table along with indications of whether or not they have previously opted out of future mailings or if emails sent to the recipients have bounced previously.



Name ↑	Account	Email	Opted Out	Bounced
Angela MacPhee	RGL Forensics	demos+angela.macphee@altvia.com		
Anne Guenther	Alta Partners	demos+anne.guenther@altvia.com		
Asher Delug	Airpush	demos+asher.delug@altvia.com		
Ashok Reddy	BETSOL	demos+ashok.reddy@altvia.com		
Ben Hendershot	Alta Partners	ben@altvia.com		
Benjamin Little	Centerline Solutions	demos+benjamin.little@altvia.com		
Beth Busenhart	Alta Partners	demos+beth.busenhart@altvia.com		
Bill Butler	KIOSK Information Systems	demos+bill.butler@altvia.com		
Brad Knepper	All Copy Products	demos+brad.knepper@altvia.com		
Brandon Jansma	Alta Partners	brandon@altvia.com		
Brett Cortese	Universal Mind	demos+brett.cortese@altvia.com		
Brian Egan	Evolve Vacation Rental Network	demos+brian.egan@altvia.com		
Bryan Bassett	HealtheCareers Network	demos+bryan.bassett@altvia.com		
Byron Hewett	SomaLogic	demos+byron.hewett@altvia.com		
Calvin Quan	Envysion	demos+calvin.quan@altvia.com		

Customize Email

During this step of the Correspond Mailing process is where the email will be customized and curated to the recipients.

Input Fields

There are five main input fields that will impact the email being sent to the recipients added in the previous step.

- From Address: The email address that will be used as the send from address for the email.
- From Name: The name that will appear as the send from sender.
- Mailing Subject: The subject of the email being sent
- CC Address: Any additional email address(es) that you would like to add to the email. The CC address(es) added will be the same across all emails sent from the Mailing.
 - If there are multiple CC addresses being added, they should be comma-separated.
- BCC Address: Any additional email address(es) that you would like to add to the email. The BCC address(es) added will be the same across all emails sent from the Mailing.
 - If there are multiple BCC addresses being added, they should be comma-separated.

Email Templates

Mailings offer the ability to start from a fresh email template or utilize an existing email template that has already been created. There are two primary forms of templates that can be used within Correspond Mailings:

- *Text Only* templates which mimic the look and feel of a standard email sent from either Gmail or Outlook.
- *HTML* templates which are created via an easy to use drag & drop editor. Mailings come with pre-defined HTML templates that can be chosen from, otherwise, selecting the *Blank* template will start you in the template editor with no pre-existing formatting.

Within each template type, Mailings offer the ability to add merge fields that will dynamically populate data from the CRM based on the contact the email is being sent to. The merge field dropdown can be found in different places depending on the email template type that is selected.

- If there are any additional merge fields that need to be added to the dropdown, please [reach out to the Altvia Care team](#).

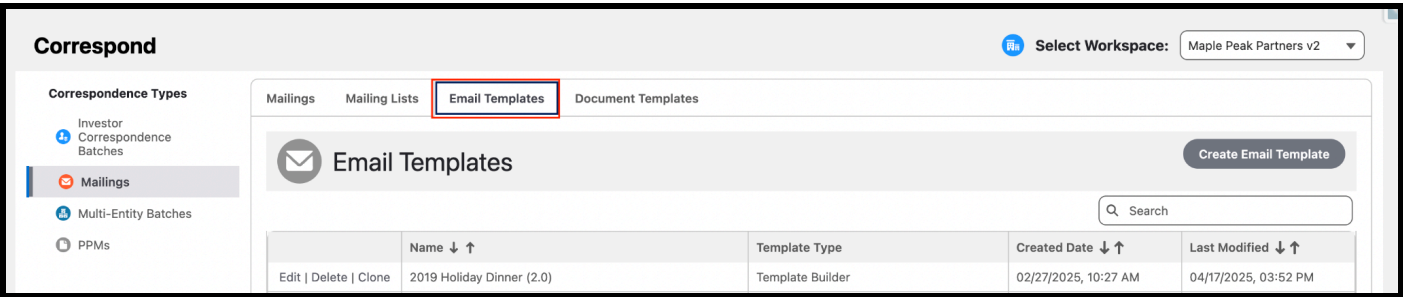
Text Only Template:

The screenshot shows the 'Customize Email' interface for a Text Only Template. At the top, there are three fields: 'From Address' (admin.maplepeakdemo@altvia.com), 'From Name' (Maple Peak Partners), and 'Subject' (General Mailing Subject). Below these, there is a section for 'Email Body Merge Fields'. A dropdown menu is open, showing 'First Name' as the selected option. To the right of the dropdown, there is a text box containing 'Copy and paste into editor' and '{{\$FirstName}}'. Below this section is a rich text editor toolbar with various formatting options like bold, italic, underline, link, and list. The main content area is a large text box. At the bottom right, there is a 'Save' button.

HTML Template:

The screenshot shows the HTML Template editor interface. At the top, there are tabs for 'Actions', 'Show structure', and 'SAVE'. Below the tabs, there is a text box with the placeholder text 'I'm a new Text block ready for your content.' and a plus icon. Below the text box is a rich text editor toolbar with various formatting options like bold, italic, underline, link, and list. The 'Merge tags' button is highlighted with a red box. On the right side, there is a sidebar with 'CONTENT', 'ROWS', and 'SETTINGS' tabs. The 'TEXT PROPERTIES' section is active, showing options for 'Text color' (hex code #555555), 'Link color' (hex code #0000ff), 'Line height' (dropdown menu), and 'Letter spacing' (input field with minus, 0, and plus buttons). Below this is the 'BLOCK OPTIONS' section, showing 'Padding' (input field with minus, 10, and plus buttons) and a 'More options' toggle switch. At the bottom right, there is a small preview icon.

Correspond Mailings allows users to create Email Templates that can be reused across Mailings, if you would like to manage these email templates, return to the Correspond home page, ensure you have Mailings selected on the left hand navigation, then click into the Email Templates. From here, you'll be able to create new email templates that can be used for future Mailings.



If you would **not** like to send an email, simply set the toggle off on top of the page. Note that anytime a document is shared with a user via VDR/Portal, they will receive a separate email from VDR/Portal (unless notifications have been paused or disabled in VDR/Portal or the user opted not to receive notifications from VDR/Portal).

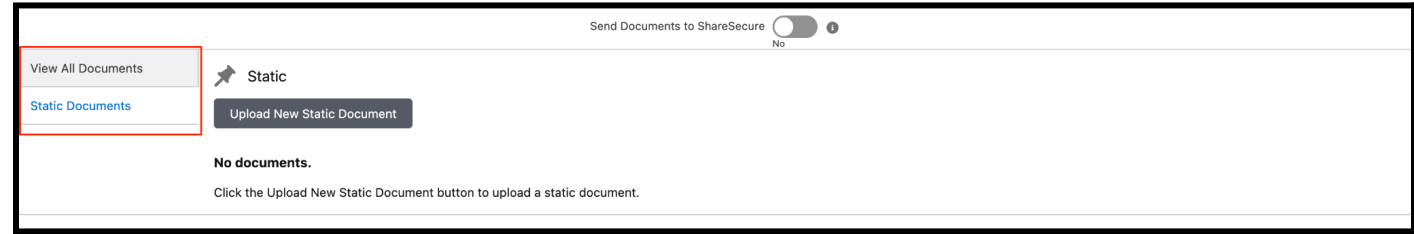
A screenshot of the email configuration form. At the top, there's a 'Send Email?' toggle switch set to 'Yes', highlighted with a red box. Below this are fields for 'From Address' (admin.maplepeakdemo@altvia.com), 'From Name' (Maple Peak Partners), and 'Mailing Subject' (General Mailing Subject). To the right are 'CC Address' and 'BCC Address' fields, and a checkbox for 'BCC every mailing?' which is checked. At the bottom, there are buttons for 'Edit Existing Email', 'Choose New Template', and 'Save and Continue'. A preview of the email content is shown at the bottom: 'Hello {{Name}}, Please see the information below. Thanks, Maple Peak Partners'.

Add Documents

Correspond Mailings allow users to upload static documents to the Mailing to include in the email being sent to the recipients.

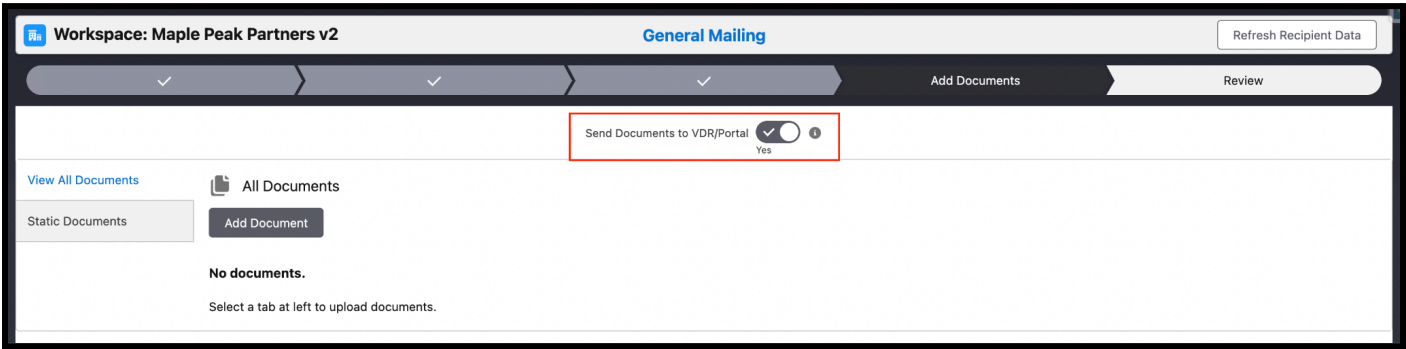
- **Static Documents:** Static documents are documents that do not contain any information that varies among recipients, each recipient will receive the same document containing the same text unless manually removed from a recipient after document upload. Static documents may be watermarked if needed.

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

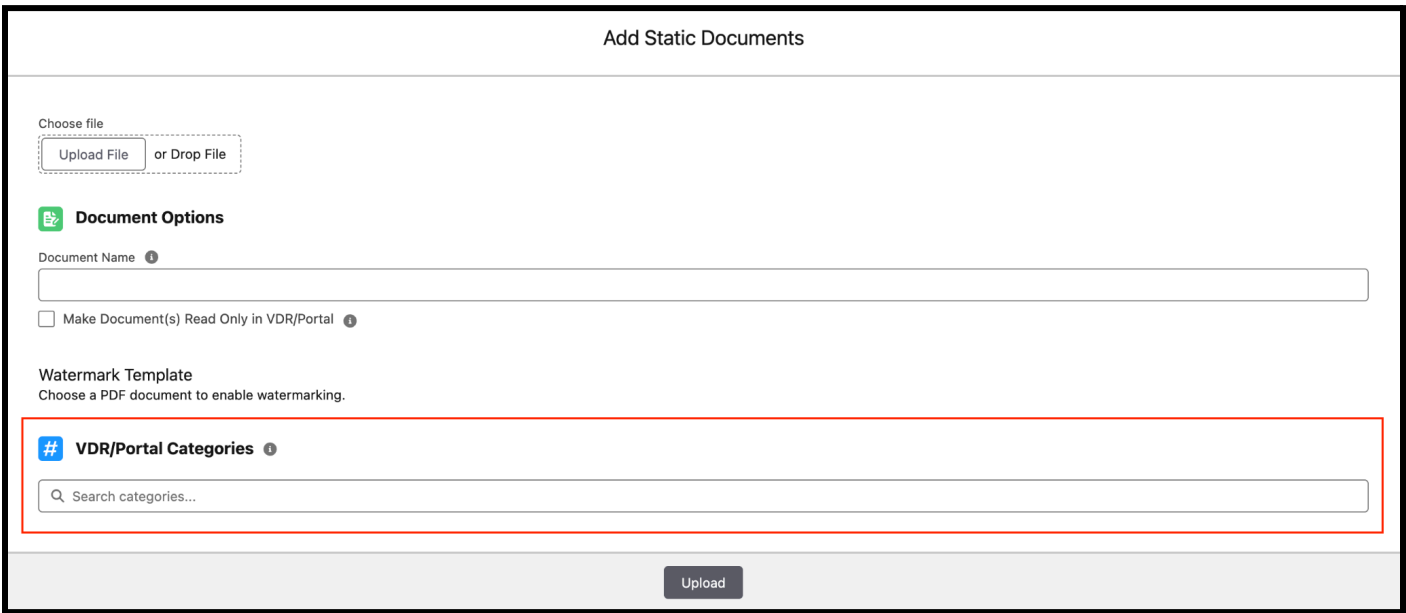


Send Documents to VDR/Portal

Mailings offers the ability to send documents directly into VDR/Portal along with attaching to the email being sent. If you would like to send documents into VDR/Portal to be shared with your recipients who have a corresponding VDR/Portal user, you may toggle the *Send Documents to VDR/Portal* toggle at the top of the *Add Documents* step.



When the *Send Documents to VDR/Portal* toggle is turned on, you'll be able to assign VDR/Portal categories to the documents included in the Mailing as well so that they are probably assigned categories when they are shared within VDR/Portal.



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 an additional document due to special circumstances – you can upload it in the table in the bottom half of this page. Simply locate that recipient and use the *+ Add Document* option to upload the document.

Preview Documents				
Q Search recipients...				
Showing 1-125 of 125 records.				
Recipient	Email	Document	Document Type	Categories
Angela MacPhee (+ Add Document)	demos+angela.macphee@altvia.com			
Anne Guenther (+ Add Document)	demos+anne.guenther@altvia.com			
Asher Delug (+ Add Document)	demos+asher.delug@altvia.com			
Ashok Reddy (+ Add Document)	demos+ashok.reddy@altvia.com			
Ben Hendershot (+ Add Document)	ben@altvia.com			

Reviewing a Mailing and Delivering

Review Mailing Data

We've provided a few tabs to help you make sure that everyone who's supposed to be receiving this Mailing is going to based on all the information that Correspond has available:

- Recipients Receiving Correspondence:** This tab displays all recipients who will receive the mailing. The table displays recipient names along with their email address, any documents & categories assigned to the documents, along with the delivery methods. Additionally, you can preview the email that recipients will receive using the *Preview Email* option.

Recipients Receiving Correspondence					
Q Search recipients... Export Recipients					
Recipient	Document	Document Type	Categories	Delivery Methods	
Angela MacPhee (demos+angela.macphee@altvia.com)	Static	Document 1.pdf	General Correspondence	Email, ShareSecure	Preview Email
Anne Guenther (demos+anne.guenther@altvia.com)	Static	Document 1.pdf	General Correspondence	Email, ShareSecure	Preview Email
Asher Delug (demos+asher.delug@altvia.com)	Static	Document 1.pdf	General Correspondence	Email, ShareSecure	Preview Email
Ashok Reddy (demos+ashok.reddy@altvia.com)	Static	Document 1.pdf	General Correspondence	Email, ShareSecure	Preview Email
Ben Hendershot (ben@altvia.com)	Static	Document 1.pdf	General Correspondence	Email, ShareSecure	Preview Email
Benjamin Little (demos+benjamin.little@altvia.com)	Static	Document 1.pdf	General Correspondence	Email, ShareSecure	Preview Email
Beth Busenhart (demos+beth.busenhart@altvia.com)	Static	Document 1.pdf	General Correspondence	Email, ShareSecure	Preview Email
Bill Butler (demos+bill.butler@altvia.com)	Static	Document 1.pdf	General Correspondence	Email, ShareSecure	Preview Email

- Recipients without Correspondence:** This tab displays a list of recipients who have specifically unsubscribed/opted out from a previous mailing and no longer want to receive future mailings, or whose email address has resulted in a bounce.
- Recipients Missing Delivery Info:** This tab displays a list of recipients who are missing an associated email address and therefore we cannot deliver anything to.

Send Test Email

If you would like to send out a test email to yourself to review how the email looks within an inbox, you can do so by using the *Send Test Email* button. Within this popup, simply input your email address and then press *Send Test Email Now* and you will receive a test email within your inbox.

- The email will contain randomly selected merge data.

Schedule Send

If you would like to schedule the mailing to be sent out at a specific date and time, this can be accomplished using the *Schedule Send* button. Input the time and date in which you would like the Mailing to be sent and then press *Confirm Scheduled Delivery*. Mailings may only be scheduled up to 7 days in the future.

- You may unschedule mailings, this is not permanent and can be undone if needed.

Schedule for future delivery

Select Date and Time ⓘ

* Date

Feb 12, 2025

📅

* Time

1:30 PM

🕒

(Maximum time is up to 7 days in the future)

Confirm Scheduled Delivery

Send Drafts to VDR/Portal

If documents are being sent into VDR/Portal, the *Send Drafts to VDR/Portal* button will display within the review step of the Mailing. This button will deliver all VDR/Portal deliveries in a draft state, meaning that your recipients will not be able to see them (draft documents in VDR/Portal are visible only to admins).

Workspace: Maple Peak Partners v2

General Mailing

Refresh Recipient Data

Review

Send Test Email

Schedule Send

Send Drafts to VDR/Portal

Confirm & Deliver

Correspondence Details

Name

General Mailing

Correspondence Type

Mailing

Created At

11/5/2025, 7:42:15 AM

Status

Unsent

Individual Recipients

1

Documents

1

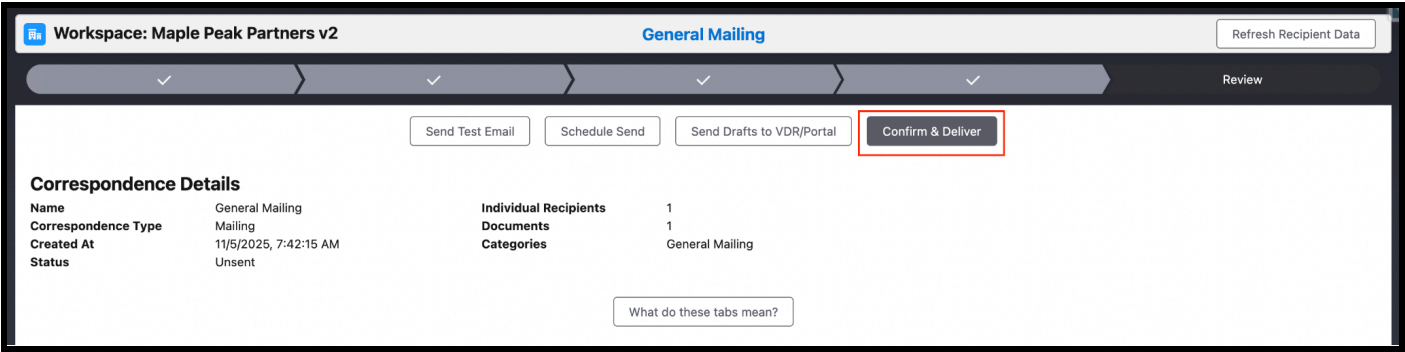
Categories

General Mailing

What do these tabs mean?

Confirm & Deliver

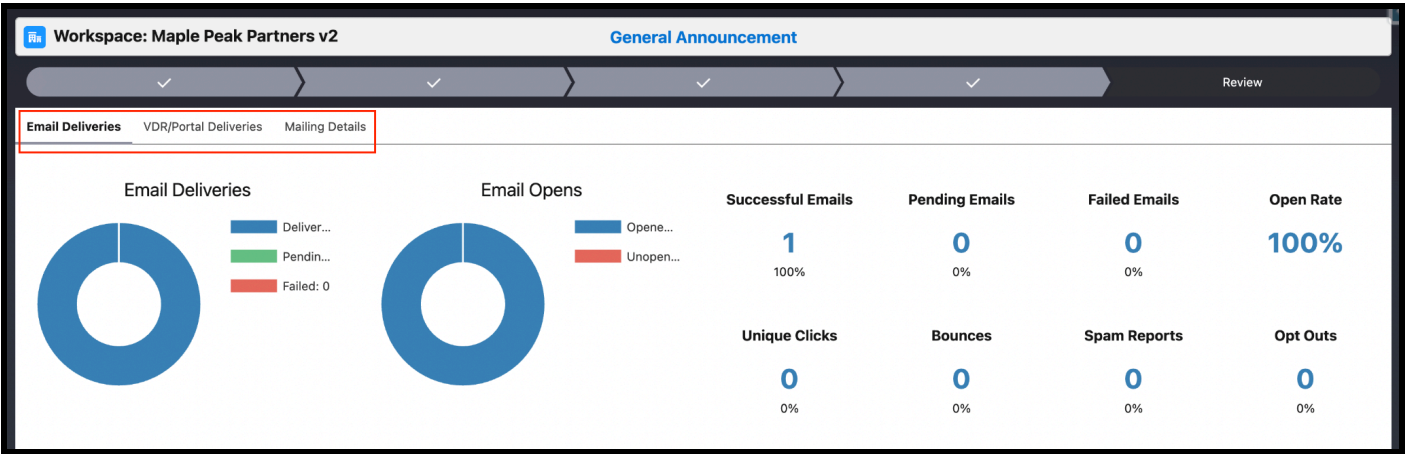
Once you're ready to send your Mailing, click this button!



Using the Delivery Report

Once your Mailing has started making its way out to recipients, you'll be redirected to a delivery report. The delivery report will have three main tabs that are found at the very top of the delivery report.

- Email Deliveries (will only display if email deliveries were enabled for the Mailing)
- VDR/Portal Deliveries (will only display if VDR/Portal deliveries were enabled for the Mailing)
- Mailing Details



Email Deliveries: All deliveries related to direct emails will display within this tab in the delivery report. There will also be general delivery charts & statistics found in the top half of the report. Engagement charts can be found under the general statistics and will display engagement within the emails based on the number of opens over a specific period of time along with listing out the top engaged contacts based on the number of email opens. Below the delivery charts will be a delivery table showing all underlying emails that were sent for the Mailing along with which recipients they went to.

VDR/Portal Deliveries: All deliveries related to VDR/Portal deliveries will be found within the VDR/Portal Deliveries tab. Similarly to the Email Deliveries tab, there will be general delivery charts found at the top half of the report along with a deliveries table found in the bottom half displaying all contacts that received a VDR/Portal delivery along with the VDR/Portal View Status.

Mailing Details: This tab will display basic information about the Mailing that was sent, such as the Date & Time in which the Mailing was delivered along with the number of individual recipients and the number of documents included.

Appendix

Frequently Asked Questions

How many total recipients can I include in a Mailing?

A single Mailing can include up to 45K recipients.

Do I always need to send an email in a Mailing?

No, with the option of toggling email deliveries or toggling VDR/Portal deliveries, Mailings can function as a way to send direct emails only, VDR/Portal deliveries only, or both.

What's the largest static document I can send in a Mailing?

- If the Mailing includes direct emails, 10MB
- If the Mailing is only VDR/Portal deliveries, 100 MB

How are unsubscribes tracked?

When a recipient unsubscribes from a Mailing, the system will recognize that unsubscribe along with the email address related to that event. The system will then find the contact record related to the email address, and update the *AC Email Opt Out* field on the specific contact record.

- If there are multiple contacts that match the email address associated with an unsubscribe event, the checkbox will be updated for all contacts with a matching email address.

Are unsubscribe events workspace specific?

No, unsubscribe events are not workspace specific if you are using multiple workspaces. If a recipient unsubscribes from a Mailing regardless of workspace, they are unsubscribed from all future mailings regardless of the related workspace selected for the Mailing.

Can the unsubscribe link be removed from an email sent in a Mailing?

No, any email sent through Correspond Mailings are considered broadcast emails which require an unsubscribe link to be included within the email.

How many contacts can be in a report that is used within a Mailing?

We support up to 8K contacts in a report that can be used in a Mailing. The report must contain the `Contact_Id` of the Contact records in order for the import to be successful.