PPM User Guide

Altvia Correspond: Investor Edition enables your communication with Investor Contacts by generating and delivering documents via email and ShareSecure for capital calls, distributions, tax documents, and general correspondence.

Master Investor Contacts

Master Investor Contacts (MICs) allow you to set up a standard set of Contacts for an Account that can be leveraged to bulk send PPMs. Simply add a particular Contact as a Master Investor Contact, set her PPM Preference to Email, ShareSecure, or both, and that Contact will be pre-added as a recipient whenever you send PPMs out to that Account.

Master Investor Contact Correspondence Preferences

CORRESPONDENCE TYPE	SHARESECURE	EMAIL	FAX	MAIL	OTHER
Capital Call	✓	✓			
Distribution Notice	✓	✓			
General Correspondence					
PPM	✓	✓			

Mass Editing Master Correspondence Preferences

You can edit Preferences for all MICs related to a single Account by clicking the Edit Master Preferences button on Account. Additionally, you can update each MIC's Investor Contacts as you go using the Update Investor Contacts button associated with each grid.

Prerequisites for Sending PPMs

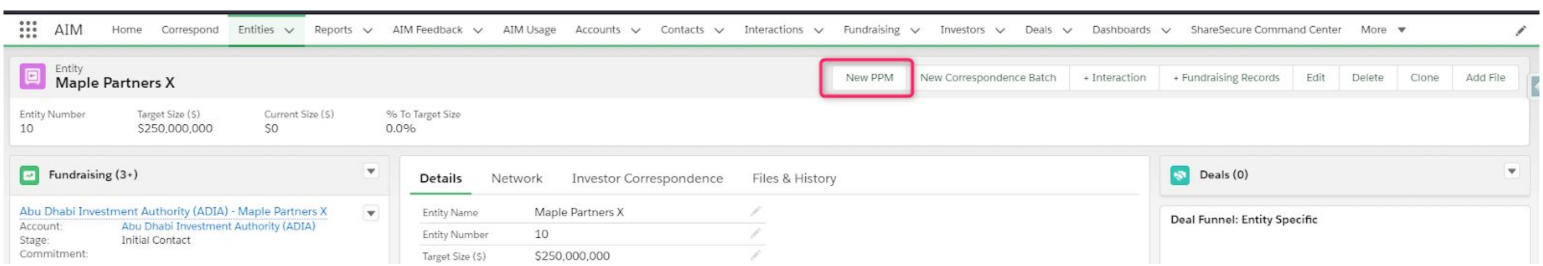
In order to send PPMs, you'll need to ensure that the following conditions have been met. Please don't hesitate to reach out to the Altvia Care team if you're unsure about any of them:

- PPMs have been configured in AIM.
- For ShareSecure deliveries: The user who will be preparing and sending your IC Batch is a ShareSecure administrator whose API key has been correctly configured in AIM and who has permission to publish documents in ShareSecure.
- For document generation from a template: You've worked with Altvia to set up the templates you'll create your account-specific documents from.

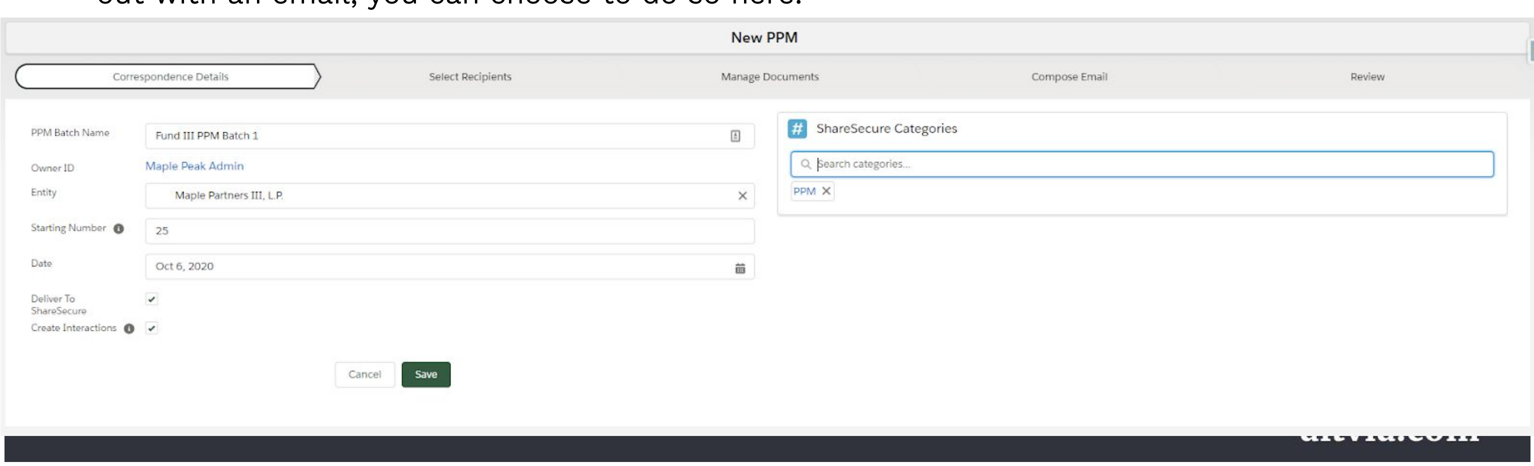
Sending a Batch

Batch Details and Categories

- You can start your batch from four places: 1) the Entity you'd like to send from; 2) a specific Account you'd like to create a PPM for; 3) a Fundraising record you'd like to create PPM for; or 4) or the Correspondences tab.



- Fill out batch details: Select the appropriate Investor Correspondence batch type, and enter information related to the batch. If you'd like to deliver PPM documents to ShareSecure, indicate that here. Additionally, if you'd like to create Interactions for each PPM that's generated and sent out with an email, you can choose to do so here.



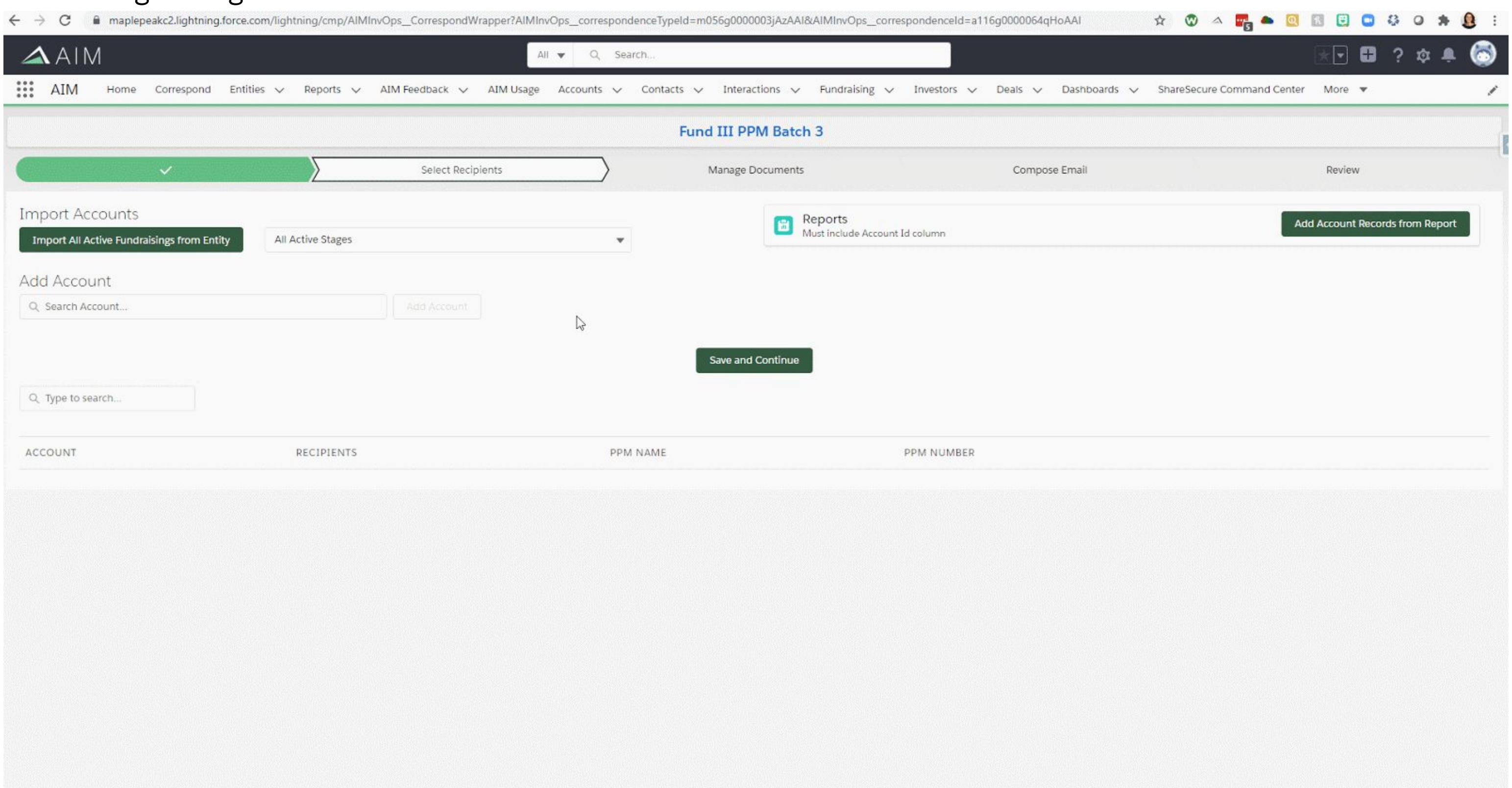
- Add ShareSecure categories: Before pressing save, add any ShareSecure categories you would like to have applied to all documents in this batch. You can tag the batch either with existing ShareSecure categories, or you can create new ones.

Choose Recipients

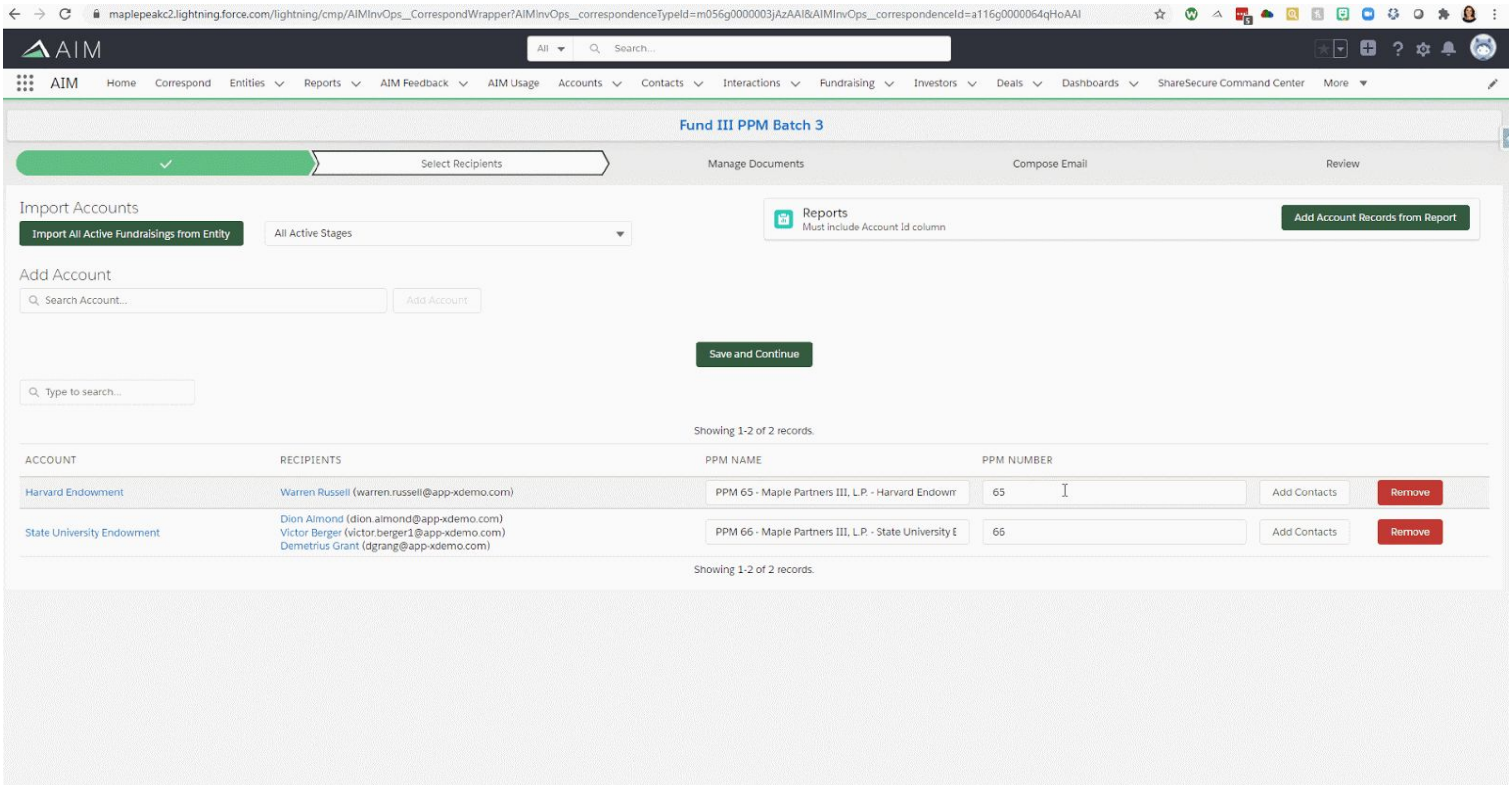
Adding Accounts

On this screen, you can add any Accounts you'd like to send a PPM to within this batch in one of three ways:

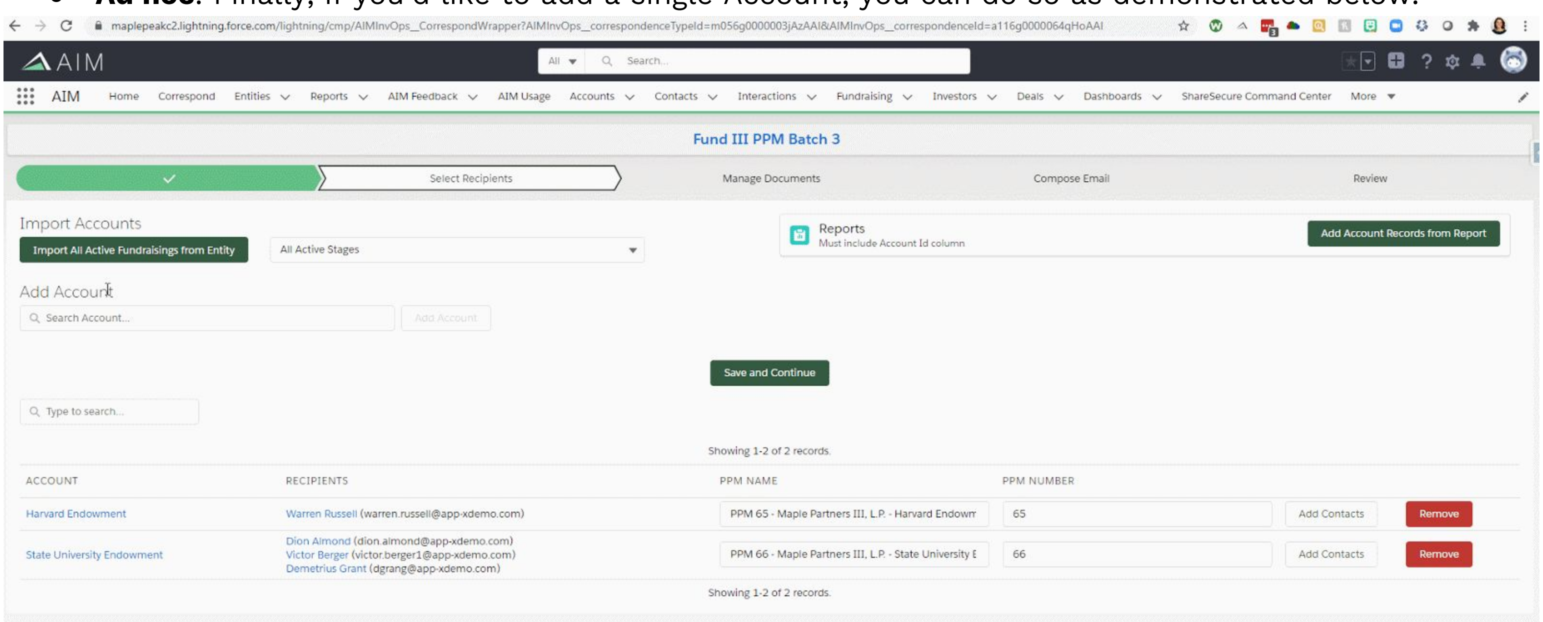
- **Fundraising stage**: You can add all Accounts with an active Fundraising opportunity associated with your chosen Entity, or you can narrow your selection down to Fundraising opportunities in a single stage.



- **Add from report**: If you'd like to add a group of Accounts using a Salesforce report, you can do so. Just be sure to include the Account ID as a column in the report you use.



- **Ad hoc**: Finally, if you'd like to add a single Account, you can do so as demonstrated below.

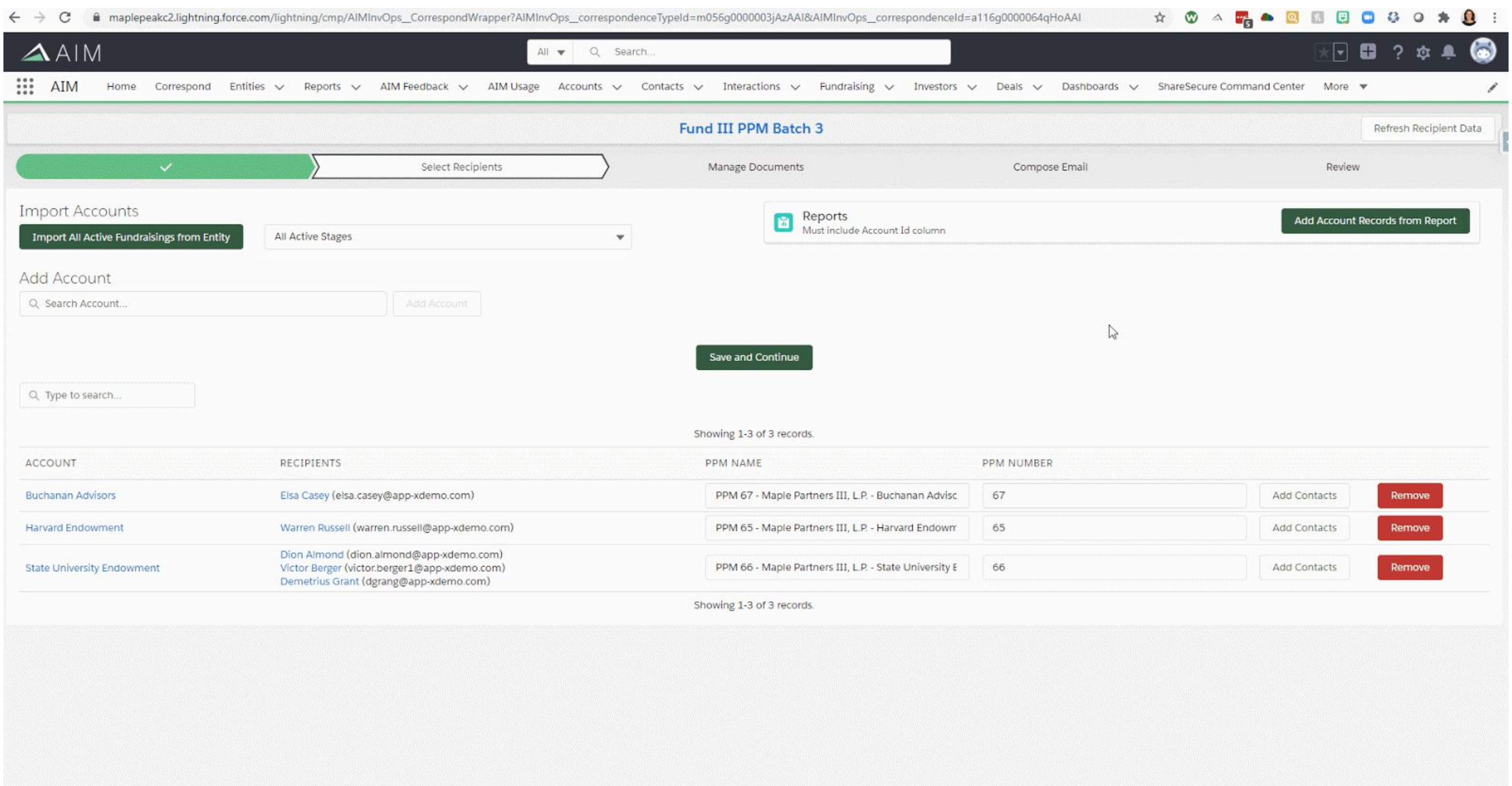


Once you've added the Accounts you'd like to send PPMs to in this round, you can make manual adjustments to PPM numbers or PPM names (PPM names will be assigned as the names of the documents you generate in the next step. Out of the box, this naming convention is **PPM Number - Entity Name - Account Name**.

Adding Contacts

Once you've added Accounts, you can select Contacts who should receive the PPM for each Account in two ways:

- **Prepopulate recipients using Master Investor Contacts**: If you'd like to preselect Contacts who should receive PPMs for a particular account, use Master Investor Contacts to do so. If you choose to use this option, any accounts added to a particular PPM batch will appear with those Contacts already selected as recipients.
- **Ad hoc Contact addition**: If you'd prefer not to leverage Master Investor Contacts to prepopulate PPM recipients for each Account, you can add Contacts one by one using the **Add Contacts** button. When recipients are added in this ad hoc manner, we will attempt to deliver PPMs to that Contact using all delivery methods you've selected when building your batch (Email, ShareSecure, or both).

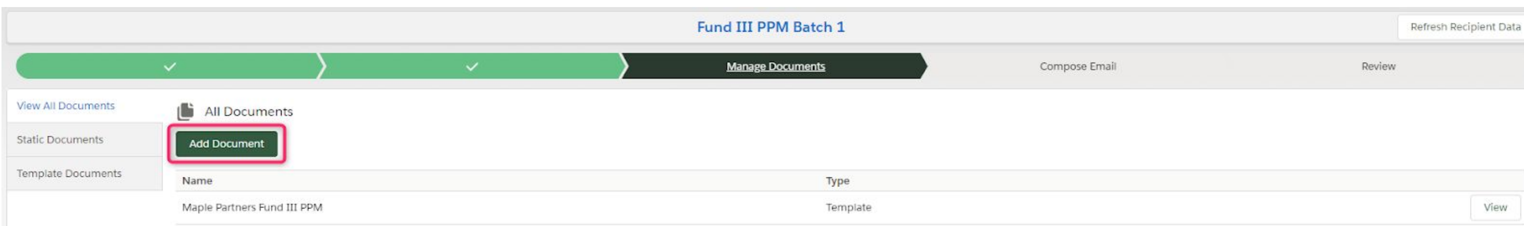


Manage Documents

There are two types of documents you can use to generate a PPM. Descriptions of each below:

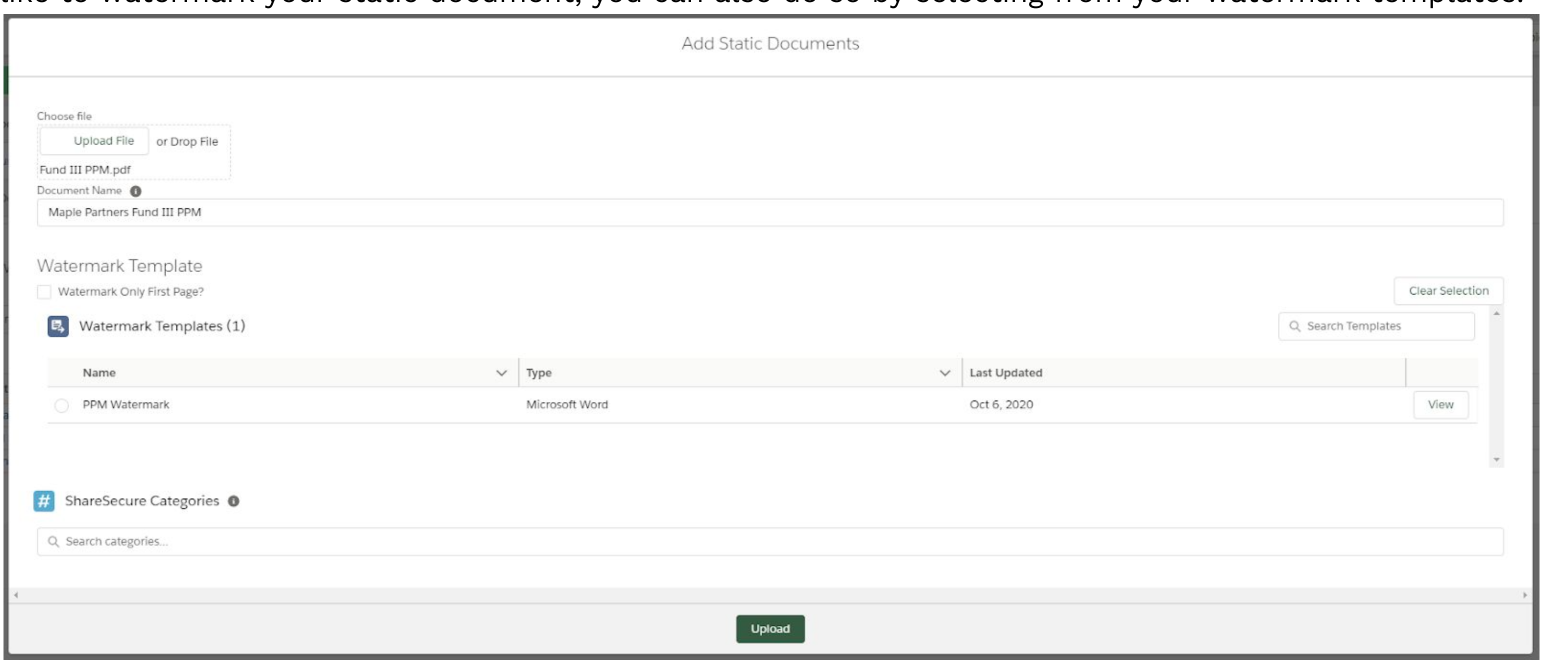
- **Static Documents**: Static documents are documents that do not contain any information that varies among Accounts, so each recipient will see the same document containing the same text. Static documents will be uploaded from a user's local machine.
- **Template Documents**: Dynamic documents are created by populating a template with data unique to an Account. The data must be stored in fields on the PPM object in order to be populated correctly using Investor Correspondence. Please refer to the "AIM Docs Template Wizard" tab when creating a template and adding fields to it.

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



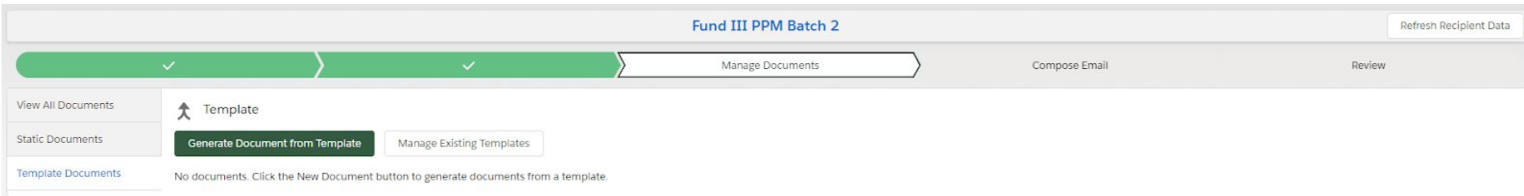
Static Documents

Static documents will be shared with all batch recipients (unless you manually remove them from certain Investors). You can customize the Document Name when you're uploading the document from your machine, and you can assign ShareSecure categories that will be applied only to this document. If you'd like to watermark your static document, you can also do so by selecting from your watermark templates.



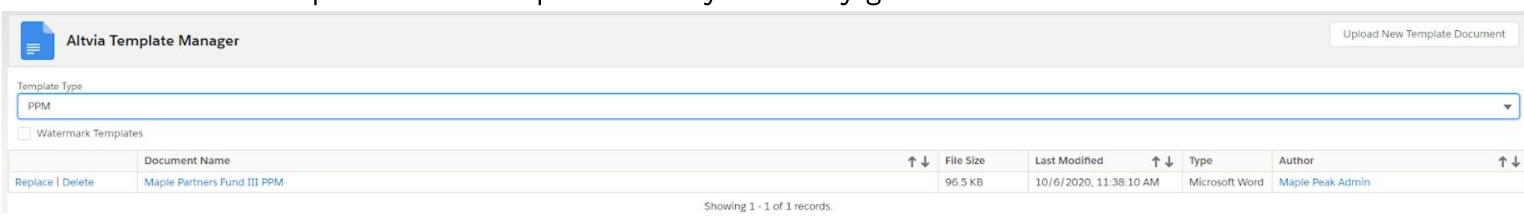
Template Documents

By navigating to the template documents tab, you can add or replace templates to base dynamically generated documents on, or you can generate documents for the batch you're working on.

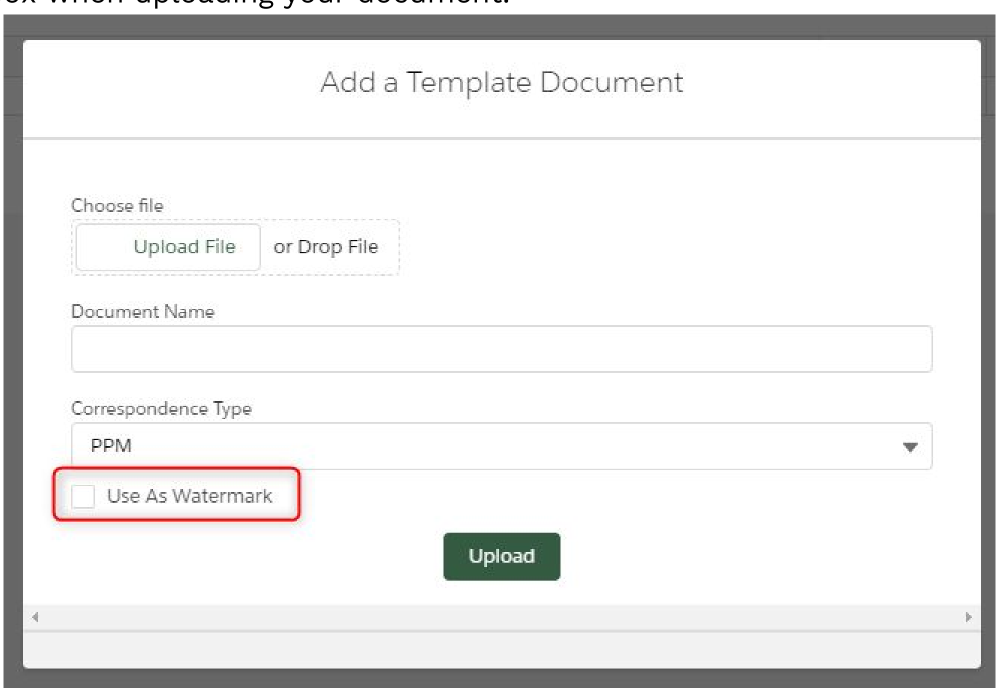


Managing Existing Templates

Clicking the Manage Existing Templates button on the Template Documents tab will take you to a page where you can both add new template documents and replace or delete existing documents, all of which will be options when you generate a dynamic, Account-specific document in the next step. All documents that are uploaded as templates for dynamically generated documents must be **docx** files.

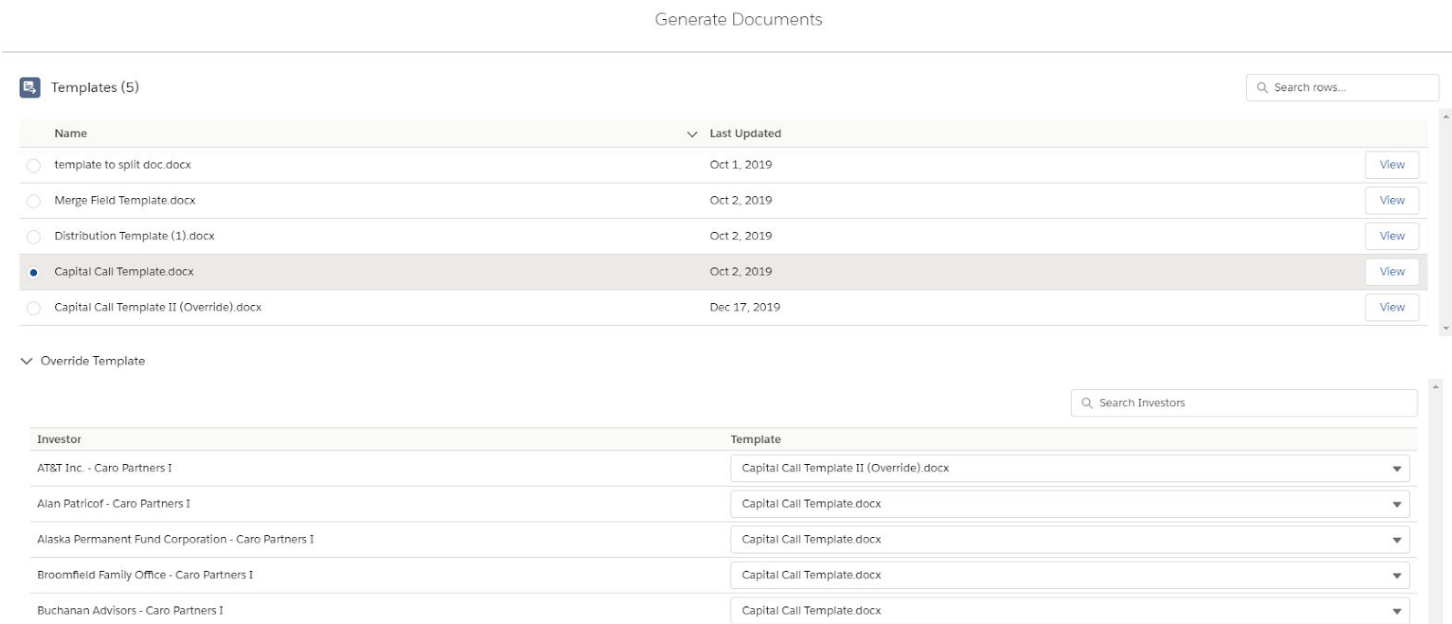


To use a template as a watermark, as mentioned in the Static Documents section above, select the Watermark checkbox when uploading your document.

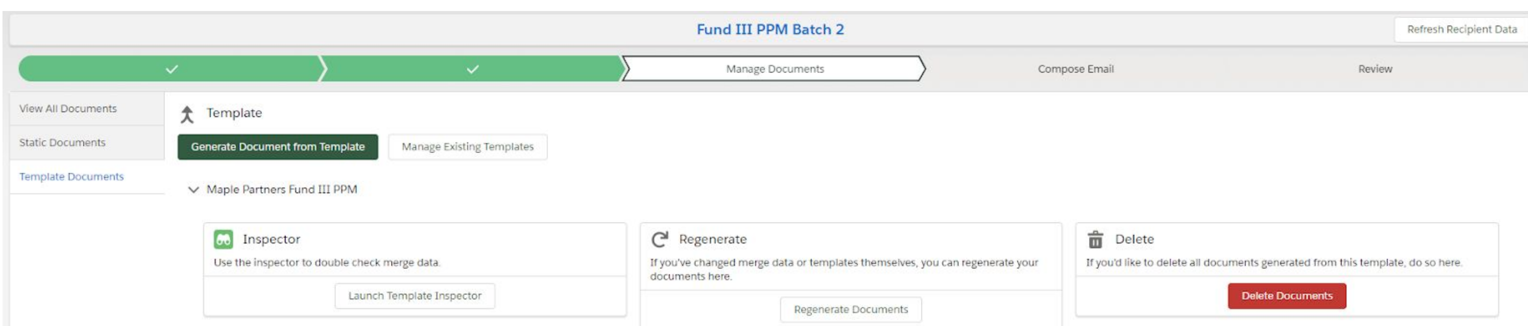


Generating Template Documents

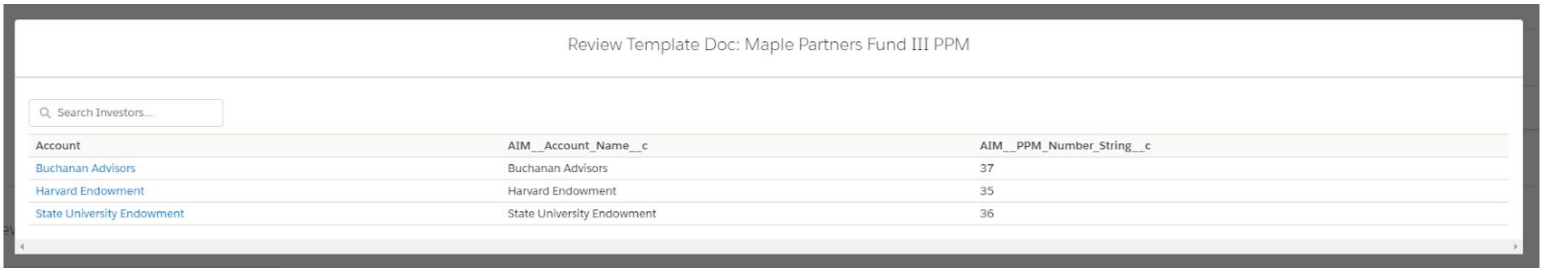
Once you've gotten set up with the templates you'd like to use, you'll be able to use them to generate documents that incorporate Account-specific merge data. Once you choose a template for your batch, you can choose Account-specific overrides for any Investors who need tweaked versions of your template.



Once you've generated your documents, you'll have a few options for interacting with your generated documents.



Use the **Template Inspector** to double check all of the data that's been merged into your documents, for each Account. This searchable table includes a row for each Account, and each column is a merge field included in the document.

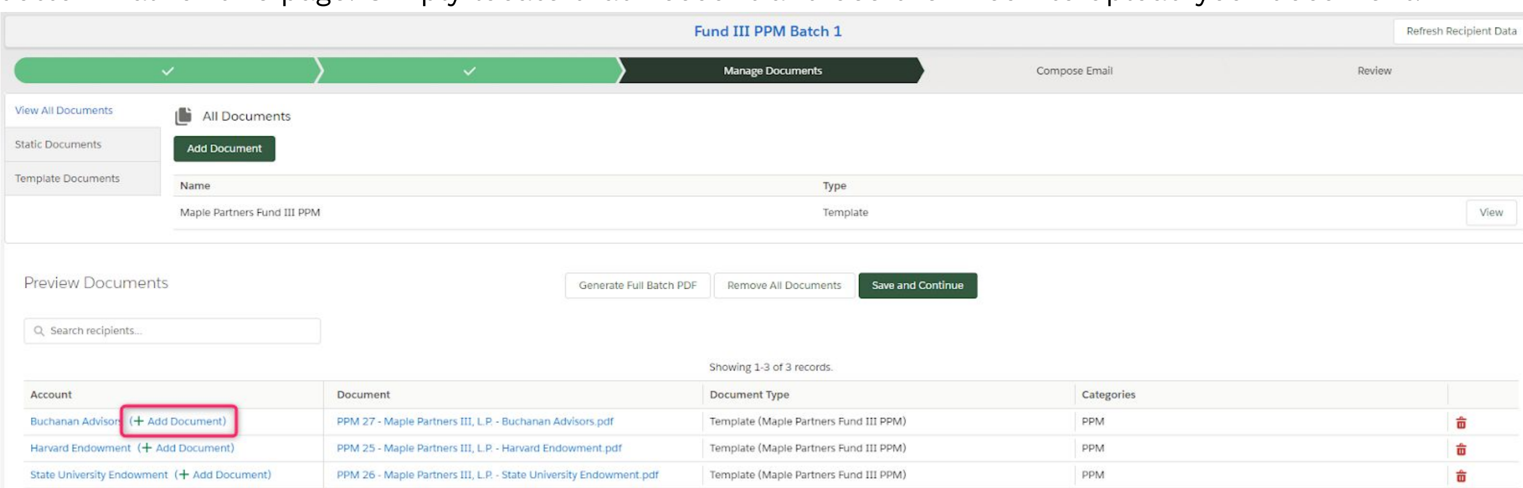


If you need to make any changes to the data that's been merged into the template documents (or to the templates themselves), you can do so by clicking the **Regenerate Documents** button.

Finally, if you need to remove all the documents you've generated and start over, use the **Delete Documents** button.

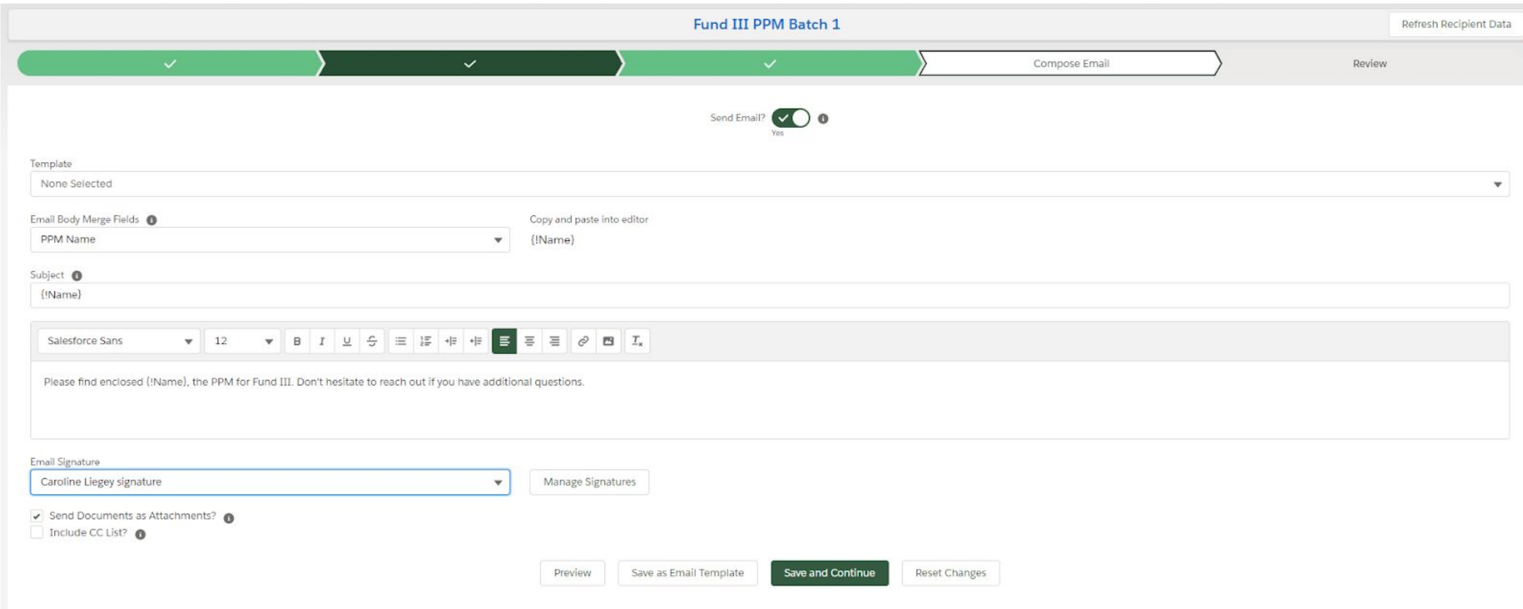
One-Off Account-Specific Documents

If you ever need to add a one-off document for a specific Account, you can upload it in the table in the bottom half of this page. Simply locate that Account and use the + icon to upload your document.



Compose Email

On this screen, you'll indicate whether you'd like to send an email as part of your batch.



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 two types of merge field:

- **Email Body Merge Field**: In this dropdown, you'll find merge fields that you might use in the subject or body of your email – for example, *Account Name* or *PPM Number*.

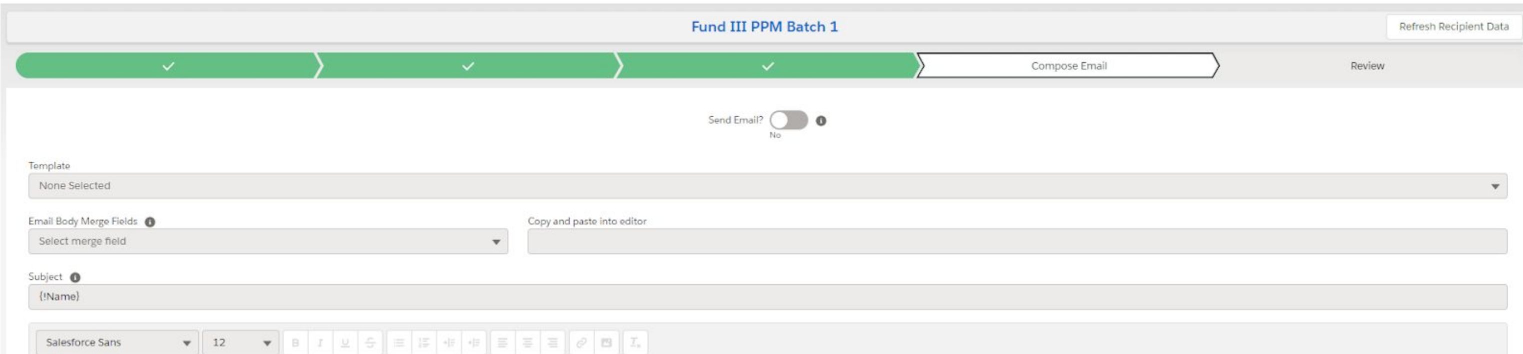
After you've composed your email, there are two more choices you can make:

- **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 you took to put this batch together will be attached to emails Investor Contacts receive.
- **Include CC List?**: If this is selected, a line will be added to this email indicating which other recipients associated with an Account have received this email. For example, if one Account has two recipients named Joe Smith and Jane Doe who will receive this email, the line added to the end of the email delivered to Joe Smith would be "cc: Joe Smith (joesmith@email.com), Jane Doe (janedoe@email.com)". You can use the Preview Email button at the bottom of this email to see exactly how the email for a particular Account will look with this box checked.

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.

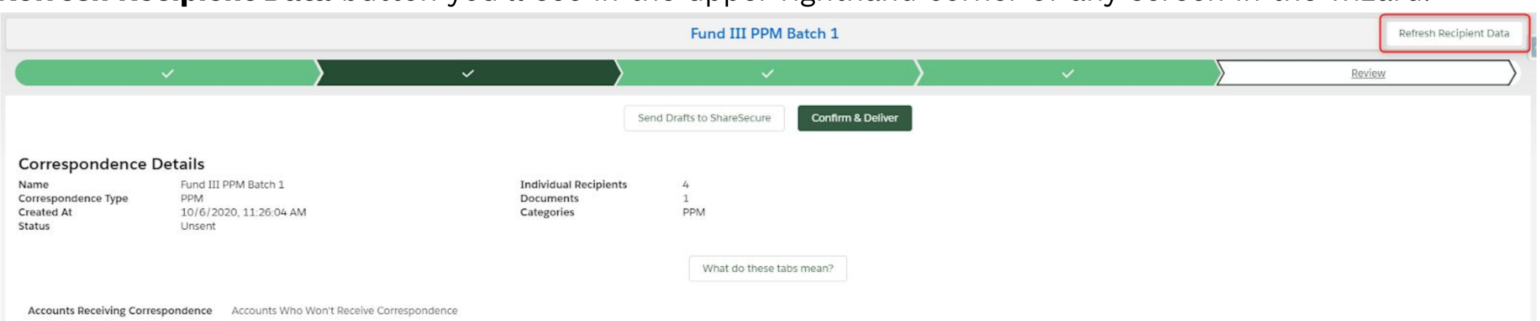
When you've finished composing your email, you can preview it for specific Accounts using the button at the end of the screen, and you can also save your work as a template to use in a later batch.

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 in ShareSecure or the user opted not to receive notifications from ShareSecure).



Refreshing Recipient Data

As you put your batch together, if you notice any email addresses or preferences that need to be changed, you can do so by clicking into the recipient in question and making updates. In order for those changes to take effect in any batches that have already been started, you'll need to click the new **Refresh Recipient Data** button you'll see in the upper righthand corner of any screen in the wizard.



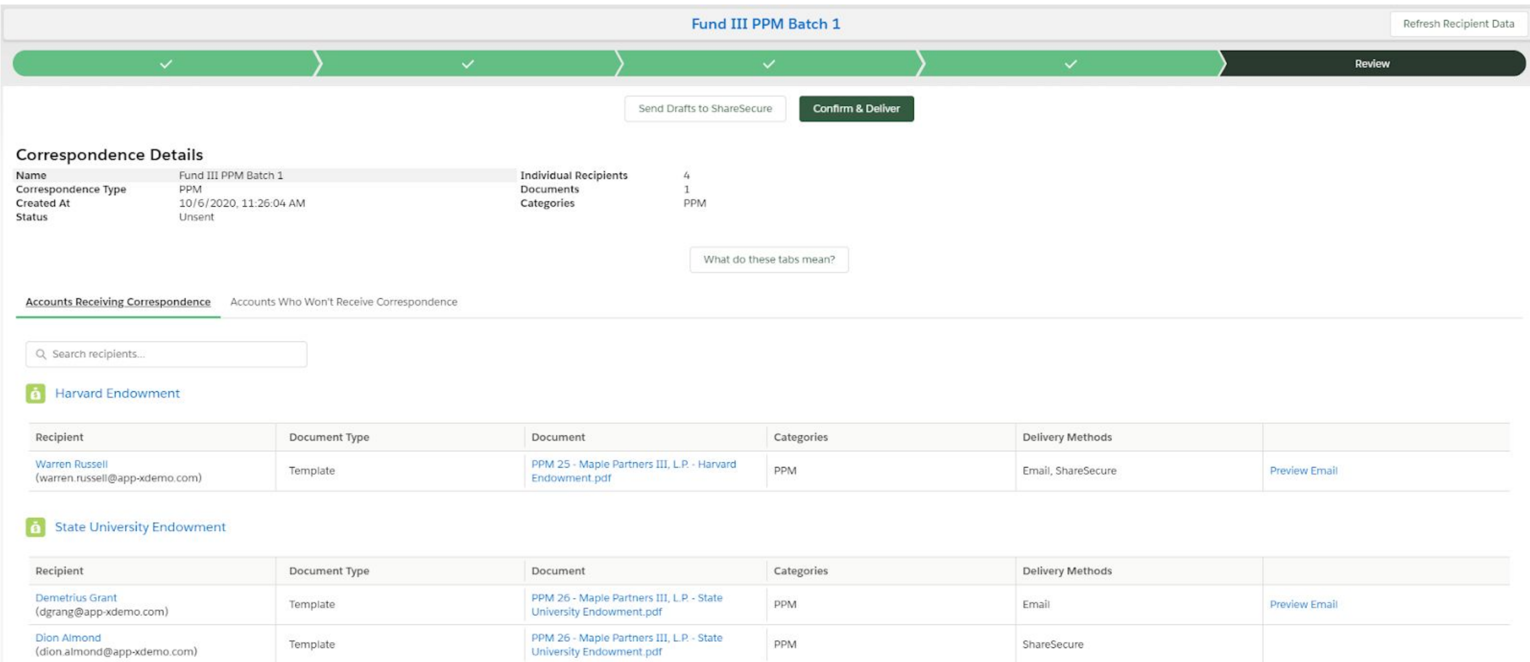
You can refresh data as many times as you'd like as you put your batch together. The best practice we suggest is to click Refresh Recipient Data right before sending your batch to ensure that you're taking advantage of the most up-to-date data in AIM.

Review Batch, Send Drafts, and Deliver

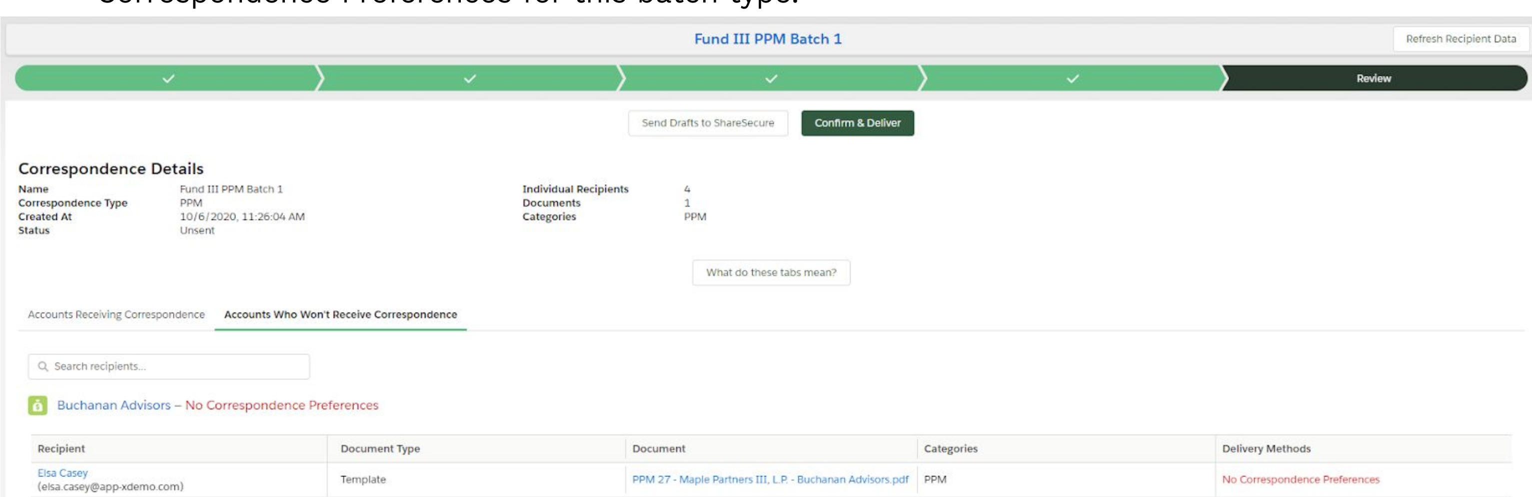
Review Batch Data

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:

- **Accounts Receiving Correspondence**: This tab displays all Accounts who have recipients who will receive your batch. The table displays all recipients grouped by Account, the documents they’ll receive, which categories those documents will be assigned, and delivery mode(s). Additionally, you can preview emails that recipients with email correspondence preferences will receive.



- **Accounts Not Receiving Correspondence**: This tab displays a list of Accounts who should be receiving documents as part of this batch – in other words, Accounts you added on the Choose Recipients page – but will not, either because 1) they lack recipients or 2) their recipients lack Correspondence Preferences for this batch type.

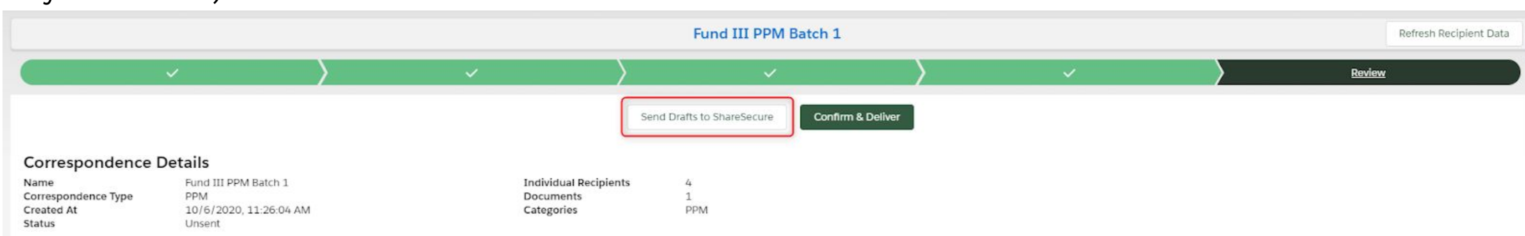


- **Email Recipients Missing Email Address**: In this tab, you'll find a list of recipients whose Correspondence Preferences indicate they should receive this batch via email **but don't have an email address filled in**.

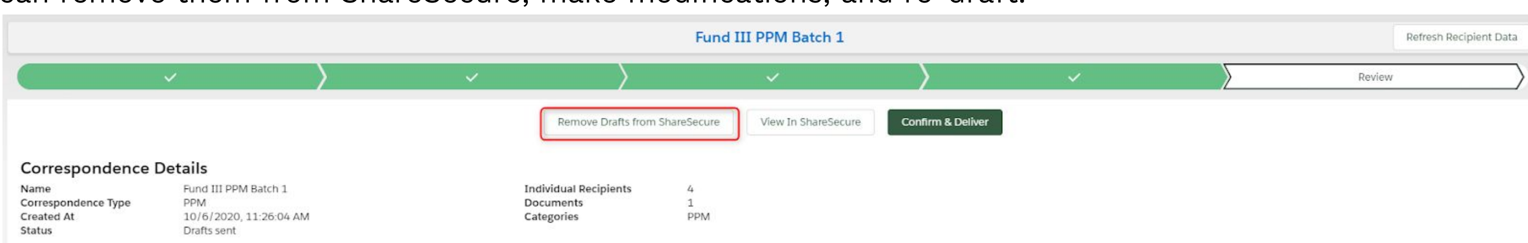
If you notice any data points you need to fix on this page, you can do so by clicking into the recipient in question and making updates. In order for those changes to take effect in your batch, however, you'll need to click the new **Refresh Recipient Data** button you'll see in the upper righthand corner of any screen in the wizard.

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).



Once you send your deliveries to ShareSecure as drafts, you can do a final spot check on documents, recipients, and categories before you officially share them. If you notice a problem with your drafts, you can remove them from ShareSecure, make modifications, and re-draft.

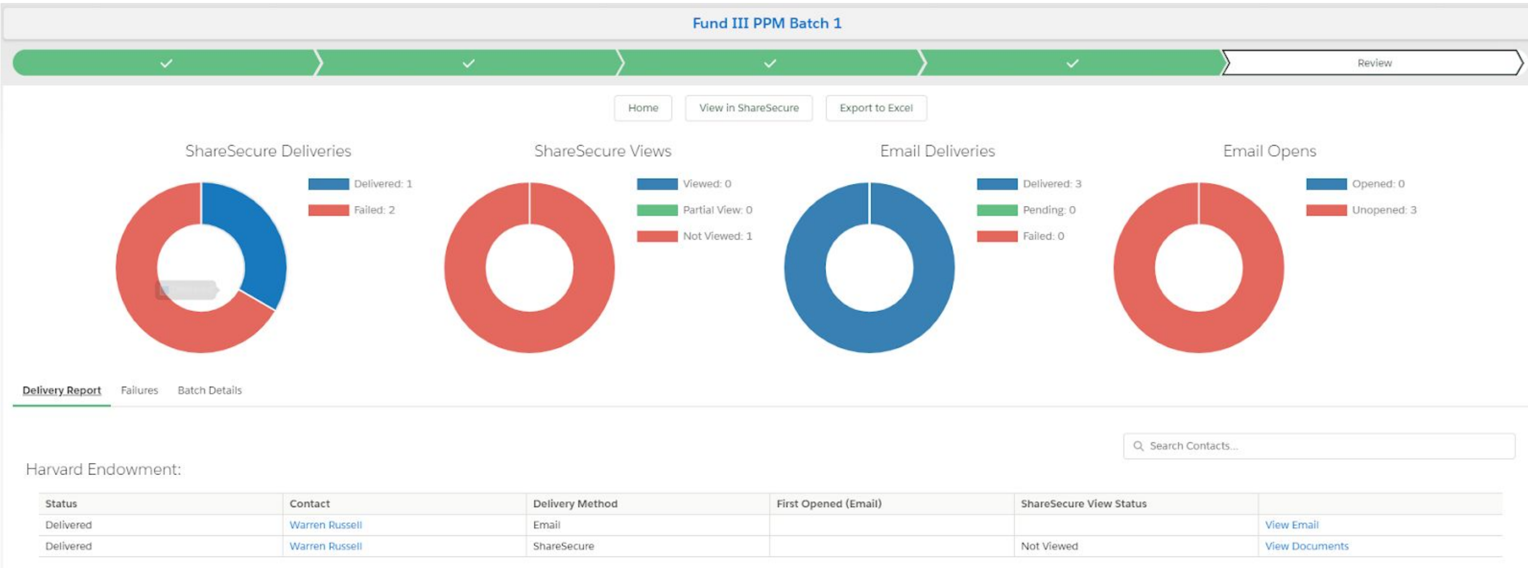


Confirm & Deliver

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

Using the Delivery Report

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



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.