



ARK GENERAL MAILINGS

Ark is excited to announce the release of General Mailings, our new email feature, designed to streamline your communications and make your workflows more efficient than ever.

With General Mailings, funds can stay connected with investors and customize their communication experience like never before.

- **New document postings** - Whether it is Audited & Unaudited Financial Statements or K1s, Ark's new email feature will automatically compile recipient lists for this file & will send emails with a direct document link to the appropriate contacts.
- **Other miscellaneous notifications** - Sending Annual Meeting invites, Fund & Firm announcements, investment updates or capital call reminders has never been easier.

Some key features:

- Ark will gather existing Fund/Investor/Role associations to generate recipients of emails, creating an integrated solution that will allow you to retire your clunky mail merge tools
- Email composer allows users to structure and design emails with ease
- Client-level outbox, which allows any user who works for the fund to preview email drafts prior to sending them.

This feature is available on the Admin Portal > Documents > Mail Selected OR Admin Portal > Mailings > General Mailings.

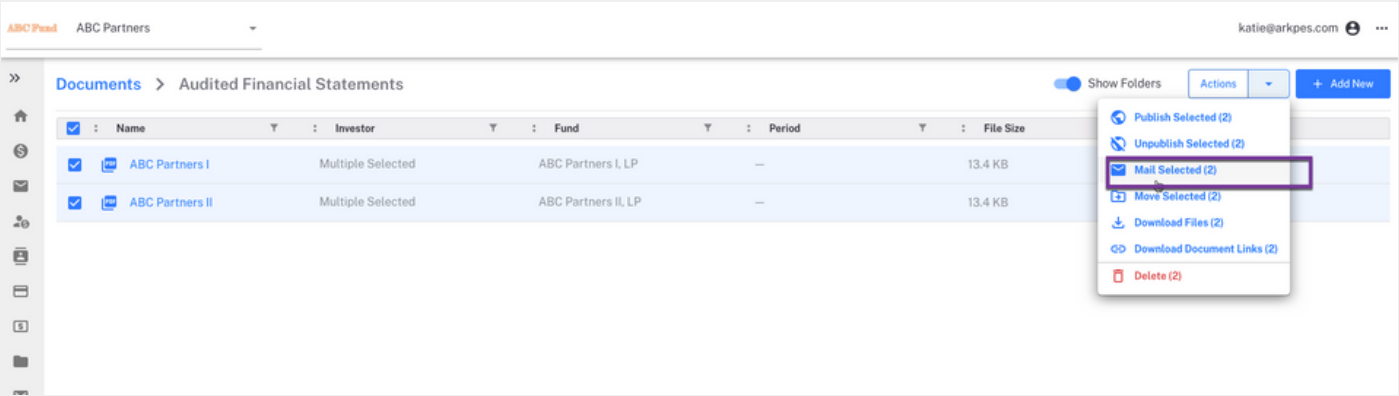
DOCUMENT NOTIFICATIONS

Ark is implementing a tool that will allow you to easily notify users of document postings.

- K1s
- Audited Financial Statements & Quarterly Reports
- Fundraising updates
- Other misc. documents

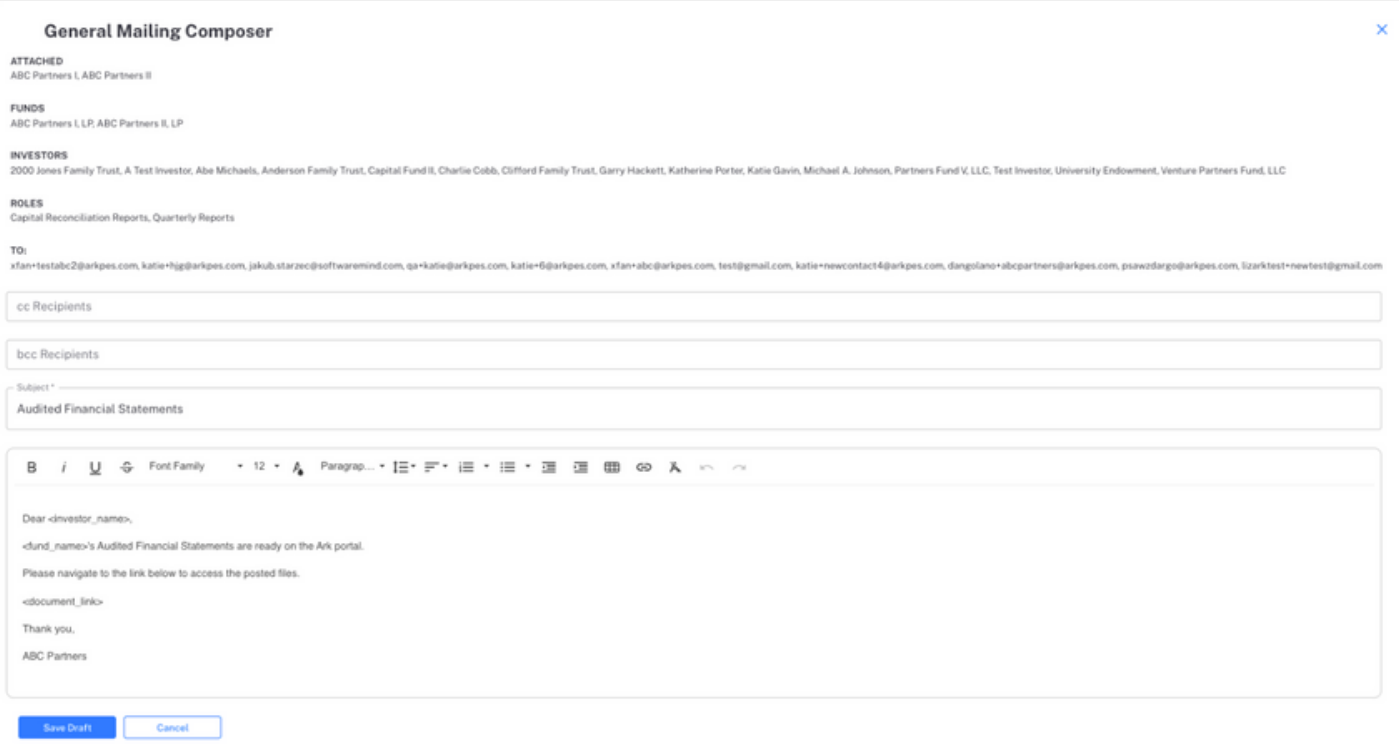
Note: The Ark platform already supports Capital Call & Distribution document notifications.

UPLOAD FILES & SELECT TO NOTIFY USERS



Files must be tagged to funds & investors and published, prior to mailing them to users.

CUSTOMIZE EMAIL LANGUAGE



Users can customize the body of emails to include text, tables, merge fields and logos. Available merge fields include <investor_name>, which will pull the unique investor name for each email to be sent and <fund_name>, which will pull the fund name associated to the document included in the mailing. One logo or image with a maximum file size of 100kb can be attached per email template by dragging and dropping the image file into the email template.

CUSTOMIZE EMAIL LANGUAGE (CONT.)

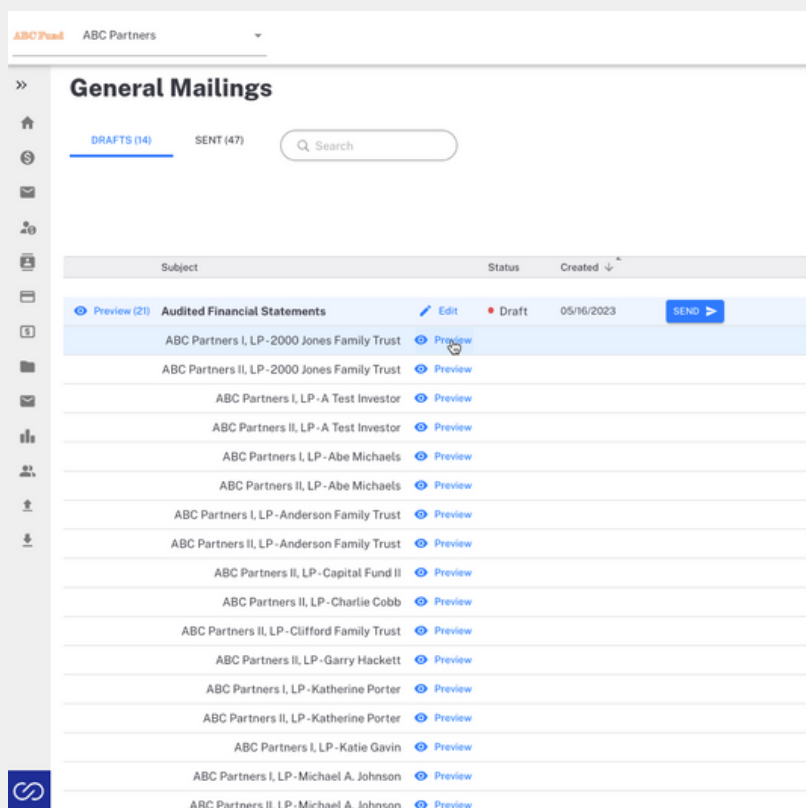
When sending documents, the recipient list is based off of:

- The file's role, based on which folder it is in.
- The Fund & Investor tags added to the file.

CCs added to the email template will be included on every email that is generated. Only use email addresses that can be seen by any Contact within the client.

Ark will automatically pull in any CCs that are set in client configuration. Users do not need to manually add these to each email.

PREVIEW AND REVIEW EMAILS



Email drafts are generated & sent based on Fund/Investor relationships. Each Fund/Investor included on the file will receive a single email with all recipients included.

Email drafts are generated based on the template subject and body. `<fund_name>` and `<investor_name>` merge fields can be used to customize the body, but they cannot otherwise be customized per Fund/Investor.

PREVIEW AND REVIEW EMAILS (CONT.)

Preview (1 of 21)

ATTACHED:
ABC Partners I

TO: ABC Partners I, LP - 2000 Jones Family Trust
xfan+testabc2@arkpes.com, katie+hjg@arkpes.com, jakub.starzec@softwaremind.com, qa+katie@arkpes.com, katie+6@arkpes.com, xfan+abc@arkpes.com, test@gmail.com, katie+newcontact4@arkpes.com, dangolano+abcpartners@arkpes.com

ROLES:
Capital Reconciliation Reports, Quarterly Reports

SUBJECT:
Audited Financial Statements

Dear 2000 Jones Family Trust,

ABC Partners I, LP's Audited Financial Statements are ready on the Ark portal.

Please navigate to the link below to access the posted files.

[ABC Partners I](#)

Thank you,

ABC Partners

< Previous

Close

Next >

EMAIL USERS

ABC Fund ABC Partners

katie@arkpes.com

Dashboard

Funds

Portfolio Investments

Investors

Contacts

Transactions

Capital Accounts

Documents

Mailings

Reports

Teams

Upload History

Download History

General Mailings

DRAFTS (5)

SENT (3)

Search

Messages	Status	Created	
ABC Partners Audited Financial Statements	Draft	04/10/2023	SEND
Your AFS are ready!	Draft	04/07/2023	SEND
AFS are ready!	Draft	04/07/2023	SEND
Annual Meeting Invite	Draft	04/07/2023	SEND
Q3 report available on Ark	Draft	04/06/2023	SEND

By clicking the send button on the template level, users can easily send multiple emails to various Contacts with the click of a single button. Please note that only ACTIVE contacts will receive emails. Contacts who are PENDING, NEW or INACTIVE will not receive an email sent from General Mailings.

Emails will be sent from either no-reply@arkpes.com, or the Send From email address that is managed in Client Configuration.

GENERAL NOTIFICATIONS

This email tool will allow admin users to select all or groups of contacts to notify about miscellaneous, non-document related items:

- Annual Meeting invitations
- Investment updates
- Firm or Fund updates
- Other misc. updates

SELECT RECIPIENTS

General Mailing Composer

RECIPIENTS:

Funds ▼

Investors ▼

Roles ▼

cc Recipient

bcc Recipient

Subject *

B i

Draft your message

...

1

2

3

4

5

6

7

8

9

10

11

12

13

14

15

16

17

18

19

20

21

22

23

24

25

26

27

28

29

30

31

32

33

34

35

36

37

38

39

40

41

42

43

44

45

46

47

48

49

50

51

52

53

54

55

56

57

58

59

60

61

62

63

64

65

66

67

68

69

70

71

72

73

74

75

76

77

78

79

80

81

82

83

84

85

86

87

88

89

90

91

92

93

94

95

96

97

98

99

100

Search

☐ All

☐ 2000 Jones Family Trust

☐ A Test Investor

☐ AO Test 01

☐ AO Test 02

☐ AO Test 03

☐ AO Test 04

☐ AO Test 06

Apply Filter

Clear Filter

Save Draft

Cancel

Users can select a combination of Funds, Investors and Roles to narrow down a recipient list for a mailing. To email all contacts, a user would select all funds, investors and roles.

CUSTOMIZE EMAIL TEMPLATES

CCs added to the email template will be included on every email that is generated. Only use email addresses that can be seen by any Contact within the client.

Ark will automatically pull in any CCs that are set in client configuration. Users do not need to manually add these to each email.

General Mailing Composer

RECIPIENTS:

Funds (5)

Investors (30)

Roles (1)

FUNDS

ABC Partners II, LP, ABC Partners III, LP, CO Test Fund, ABC Partners IV, LP, ABC Partners I, LP

INVESTORS

Katie Gavin manual2, Anderson Family Trust, katie gavintest, Capital Fund II, Test Investor, AO Test 02, Trust dated 1/31/2023, Abe Mic Family Trust, AO Test 06, Venture Partners Fund, LLC, New Inv Alloc, Charlie Cobb, AO Test 01, CO Test Investor

ROLES

Annual Meeting

cc Recipients

bcc Recipients

Subject *

Annual Meeting Invite

B*i*UFont Family14Normal

Hello, you are invited to our annual meeting. |

Save Draft

Cancel

REVIEW

Preview (1 of 27)

TO: ABC Partners I, LP - 2000 Jones Family Trust

dangolano•abcpartners@arkpes.com, jakub.starzec@softwaremind.com, katie•6@arkpes.com, katie•hjc@arkpes.com, katie•newcontact4@arkpes.com, qa•katie@arkpes.com, test@gmail.com, xfan•abc@arkpes.com, xfan•testabc2@arkpes.com

ROLES:

Annual Meeting

SUBJECT:

Annual Meeting Invite

Hello, you are invited to our annual meeting.

< Previous

Close

Next >

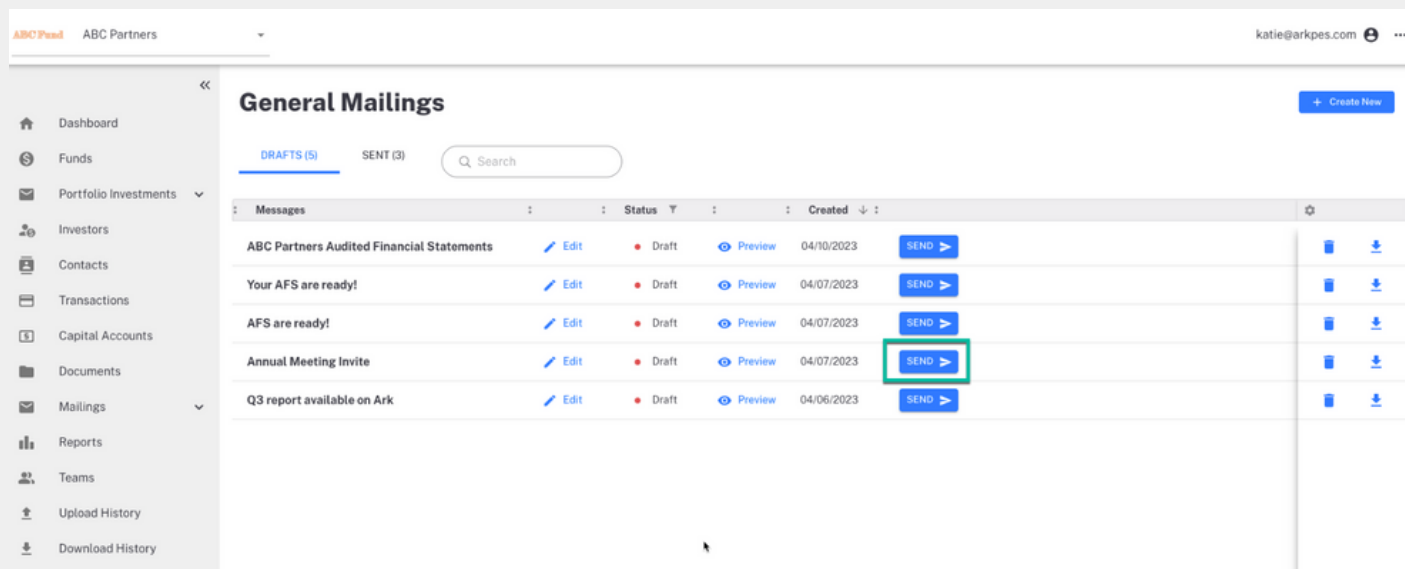
REVIEW (CONT.)

Email drafts are generated & sent based on Fund/Investor relationships. Each Fund/Investor included on the file will receive a single email with all recipients included.

Email drafts are generated based on the template subject and body. <fund_name> and <investor_name> merge fields can be used to customize the body, but they cannot otherwise be customized per Fund/Investor.

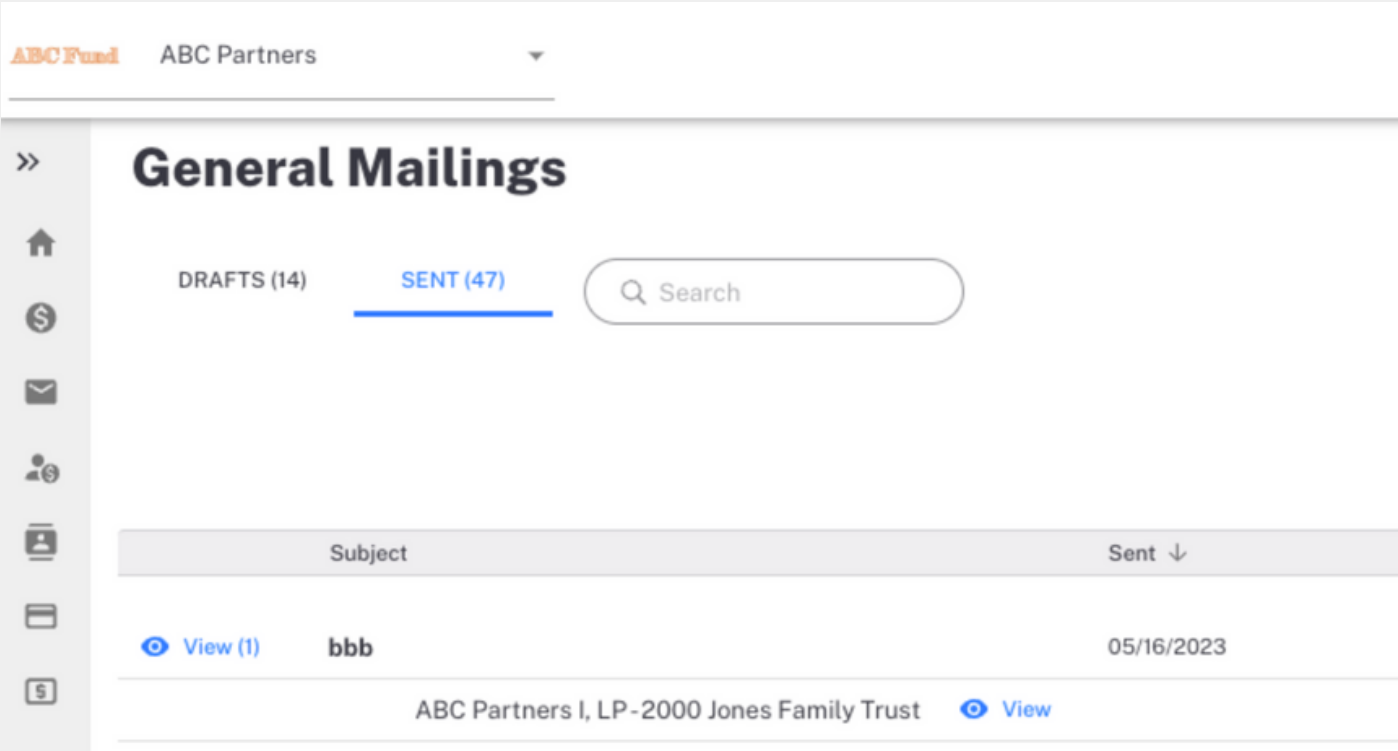
Users can shuffle through emails drafts to review few, many or all of the emails that will be delivered to contacts, prior to sending.

NOTIFY



By clicking the send button on the template level, users can easily send multiple emails to various Contacts with the click of a single button. Please note that only ACTIVE contacts will receive emails. Contacts who are PENDING, NEW or INACTIVE will not receive an email sent from General Mailings.

Emails will be sent from either no-reply@arkpes.com, or the Send From email address that is managed in Client Configuration.



Once emails are sent, they cannot be Unsent.

Emails will move from the Drafts folder to the Sent folder, and can be used for future reference or template copying.

EMAIL AUDITING

After emails are sent from the Ark platform, they will be audited in our email delivery report.

If users are using a custom “Send From” email, they will receive all bounce backs to their local inbox.