What's new in Dynamo

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Major changes

Sync Agent Web

Sync Agent Web is a web-based application that allows you to import emails from Outlook to Dynamo. It replicates the main concept of the email sync functionality of the Outlook Sync Agent tool, while at the same time it adds a significant number of new features, such as:

- Ability to connect directly to a Microsoft Exchange server and sync multiple user mailboxes,
- Ability to search for companies by the email address domains of contacts which are present in an email, and relate synced emails to those companies,
- Ability to move processed emails between folders, and delete older messages,
- Detailed sync history,
- Smart rules for post-processing of imported emails.

Please, contact your client services representative for details.
Single Sign-On

Dynamo now offers a Single Sign-On (SSO) authentication with Active Directory integration, which lets you access all of your Dynamo sites (tenants) after logging in to a SSO page just once. This enables you to navigate between your Dynamo tenants without having to log in again, and thus eliminates the need for multiple usernames and passwords.

Dynamo for iOS

A brand new app created especially for devices running iOS 8 or higher. Dynamo for iOS provides optimized graphics and completely redesigned interface for a better and more intuitive user experience. The app also allows you to access your Dynamo contact and company records on your iPhone or iPad even if you do not have Internet connection. All items that you add or edit offline are automatically updated in Dynamo when you go online.

You can install Dynamo for iOS from the App Store on your iOS device.

Data Submission Forms

Dynamo allows you to create and publish customized online forms for various purposes, such as manager valuation updates, portfolio valuation updates, or profile updates by investor. You can then invite contacts to fill them in, and submit the information back to Dynamo.

Other changes

Productivity

- **Multi-location support.** Dynamo now allows Company items to have multiple office addresses. Each employee can be associated with a specific office, and the employee address can now be automatically updated when any office address changes.

- **Automated generation and sending of Capital Account Statements.** For each reporting period, you can generate Capital Account Statements directly from Dynamo and mail them out to all the investors in a fund. The files are generated and stored in Dynamo and thus you do not need to download them and save them to a local folder on your computer.
- **Batch Portfolio Transaction** enables you to streamline the creation of multiple transactions through a single entry form. If you are a GP, you can now book simultaneously multiple summary transactions such as capital calls, management fees and distributions, and have them split automatically into individual transactions per investor account. If you are an LP, you can now book simultaneously multiple capital call, various fees, and distribution transactions between your investor account and a GP.

- **A new Domains field added to Company entity** which allows Dynamo to automatically manage Contact-Company relations, depending on the logic associated with the field. For example, when you edit the email address of a contact, and the new email address matches an existing company’s email domain, Dynamo can automatically relate the contact to the respective company and assign role and relationship to the newly created relation. Please, contact your client services representative if you want the feature enabled for your Dynamo.

**Mail Merge**

- **Send on behalf of other users.** You are now able to send merged emails on behalf of any other user in your organization which has an email account on the same Microsoft Exchange server.

- **Fixed Mail Merge jobs.** You can now save a fixed mail merge job that stores the exact recipients list and generated mail merge letters per recipient. Thus, the letters can be reviewed and edited before sending. Fixed jobs take the reviewer straight to step 5 of the Mail Merge wizard where she can either review the letters individually or open and edit the folder where they are stored.

**LP Reporting**

The following reports have been added:

- **Duplicate Suspects.** This report identifies suspected duplicate records for the Contact, Deal and Company entities.

- **Fund Pipeline Status.** The report provides both a funnel chart of the funds at each stage in the pipeline status, as well as a detailed listing of the total number of funds.

**Changes in Site Settings (Administration)**

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<th>admin This text refers to features and procedures that require administrative permissions.</th>
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<td><strong>Email History.</strong> You are now able to monitor and resend system-generated emails. All system-generated emails are logged in Dynamo as Email History items, and each of them is automatically related to its recipient Dynamo contacts.</td>
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- **Mail Merge Options.** A new section in Application Settings which enables you to configure whether activities and documents created by Mail Merge should be rolled up to
the parent entities of the participants in a Mail Merge circulation. In addition, you can configure Mail Merge to send success or failure log reports upon completing every mail merge Email or Send to Drafts operation.

- **Additional parameters in the Document Notification email template.** Three new parameters allow you to show the preferred notification frequency of each individual user in the resulting notification emails:
  - [Period] – gets replaced by today, last week, last month, depending on the notification frequency set by the user (daily, weekly, monthly).
  - [PeriodStart] – returns the beginning of the period specified by the user (daily, weekly, monthly).
  - [PeriodEnd] – returns the end of the period specified by the user (daily, weekly, monthly).