

Investory PRO Guide

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1.1 External Update Recipients


When publishing an update, you can now directly add any email address as a recipient without the need add/invite the recipient to investory.io first.

Update Setup

1 Select Recipients from Your Connections
 Select or invite people to investory below. After you have invited them, you will be able to send them an update immediately.

Connections

 Team (1/1) ▶

 Investors (5/5) ▶

[Invite Investor\(s\)](#) [Invite Team Member\(s\)](#)

2 External Recipients
 External recipients (outside of your connections) receive an update once, without invitation.
 Note that these recipients are only saved in this update (they are not saved anywhere else).

Add a External Recipient

example@address.com

You can add as many external recipients to each update as needed. Please note that currently external recipients will not be saved outside the update.

Tip: If you wish to use the same external recipients on another update, simply clone the update containing the desired recipients.

1.2 Update Scheduling

You can now change your Company Update from recurring Monthly to Weekly or Quarterly schedule.

Recurring updates are automatically generated based on a selected schedule and contain the information from your previously published update. Any chart within the update will be automatically refreshed with the latest data available in your dashboard.

Company Update Schedule
✕

1 Set Company Update Frequency
Choose your company's update frequency. Note that there is only one scheduled update per company. The contents of the last scheduled update will be copied to a new one according to this setting.

Frequency Quarterly ▼

2 Personal Reminder Option
Do you want to be reminded that the update has been generated, is due soon and overdue?

Send me Scheduled Update Reminders

3 Preview Update Schedule
Below you can preview when the next update will be made available and how the schedule will work.

Quarterly Update

Q2, 2019 Update

📌 Available on 28th, June 2019

Update Schedule

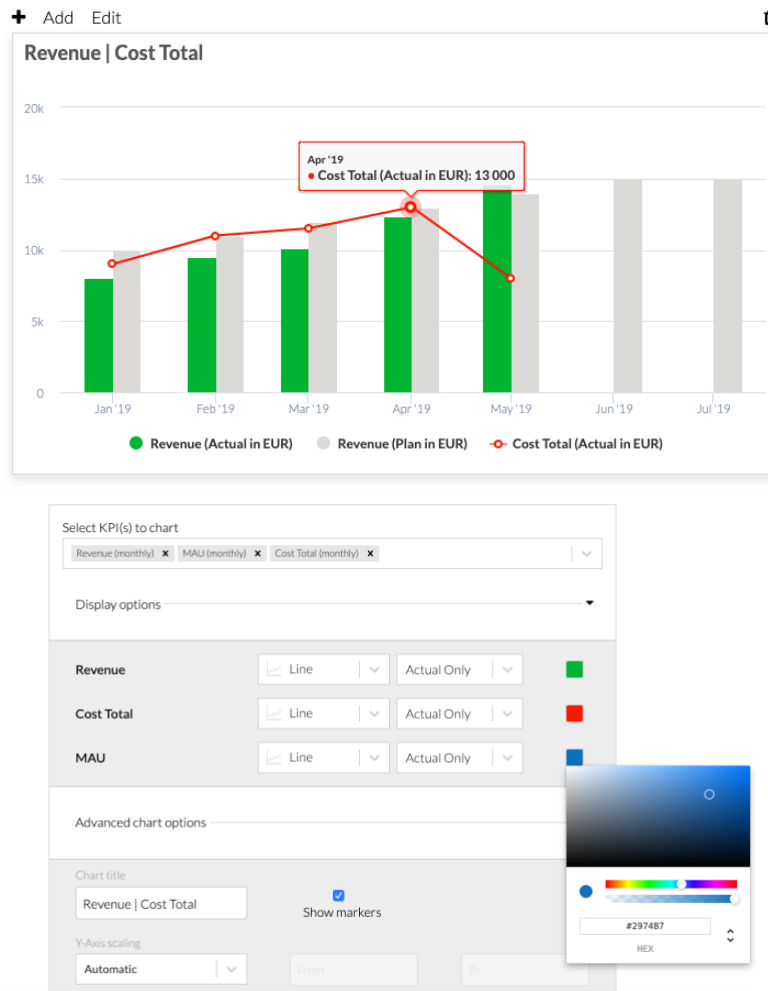
At the **end of every quarter** a draft copy of the last scheduled update will be generated. On the **15th** of the following month, we will send you a reminder to write and publish this update if you haven't done so yet.

Save Schedule

Tip: If you wish to avoid email notifications when your update is available, due or overdue, please switch Personal Reminder off in Step 2.

1.3 Customizable KPI Charts

In your update, you can track multiple KPIs and assign colours to best represent your data. Cross multiple KPIs, select to show Actual, Planned or both values as a comparison and customize the time period.

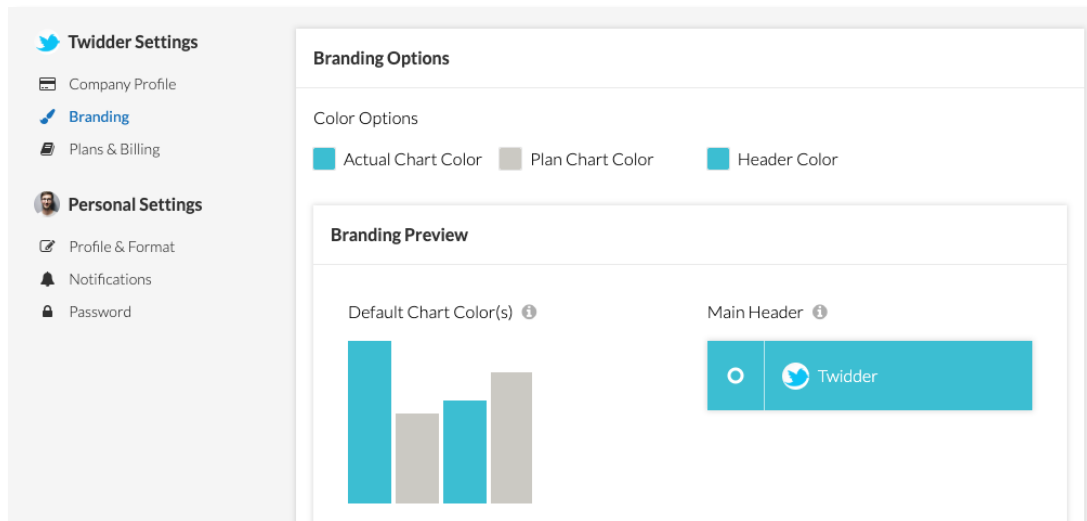


Each chosen KPI can be assign a different colour as well as Actual and Planned values for easy comparison.

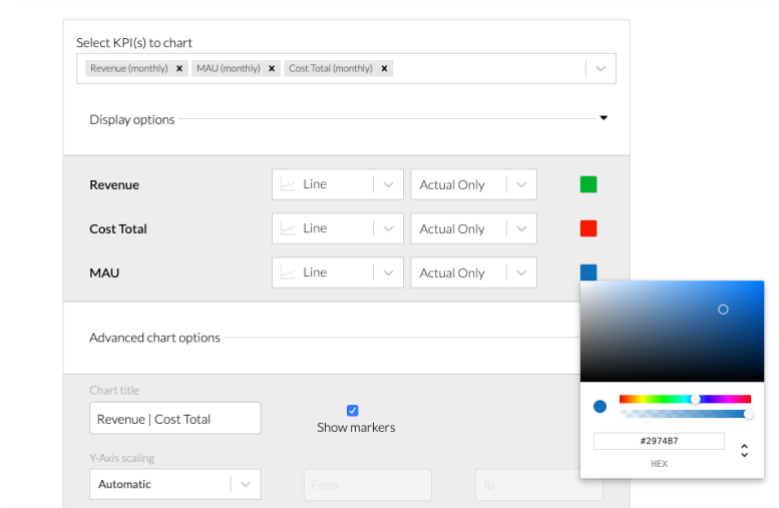
2. Company Branding

You can choose a custom colour scheme for the navigation header as well as default chart colours for Actual and Planned values.

Colours are set under Company Settings -> Branding.



Further customization of charts is available within the update itself, where you can cross multiple KPIs and select individual colours for each.



3. Multiple Data Rooms

In addition to your company Data Room with investors with access permission can view, you can now also create multiple shareable data rooms.

Each Data Room can be shared via a shareable link with anyone, regardless of their investory.io status.

Setting up your Data Room:

- Unlimited number of individual Data Rooms up to 5GB overall storage limit
- Ability to allow for commenting at a Data Room level
- Download All files within each Data Room
- Password protected shareable links
- Notifications and Data Room Stats (number of views and downloads)

Data Room Setup

✎ Name

🔒 Access

🔗 Shareable Link

📄 Copy

💬 Comments
Data Room Comments ⓘ

📧 Notifications
Data Room Access Notifications ⓘ