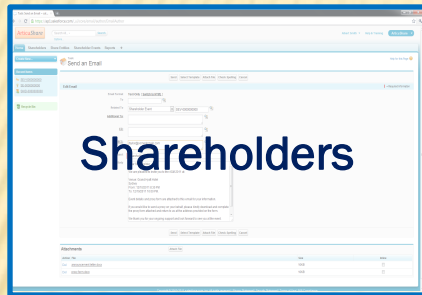
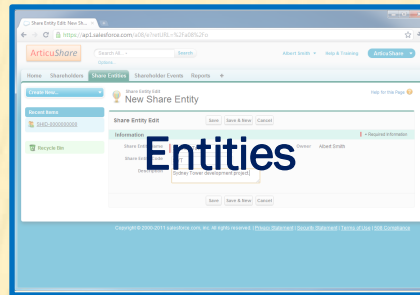


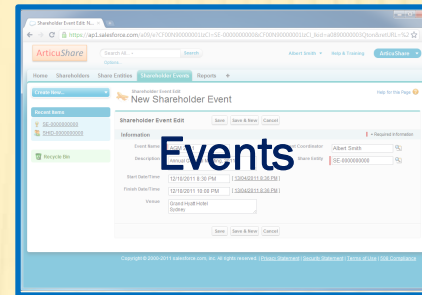
MANAGE SHAREHOLDER COMMUNICATIONS ONLINE



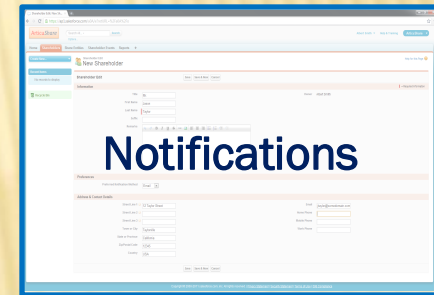
Keep shareholder data secure



*Companies
Development projects
Trusts
Other Investments*



*Annual General Meetings
Corporate Events
Investment Updates*



*Invitations
Communications*

ArticuShare v1.1

USER GUIDE

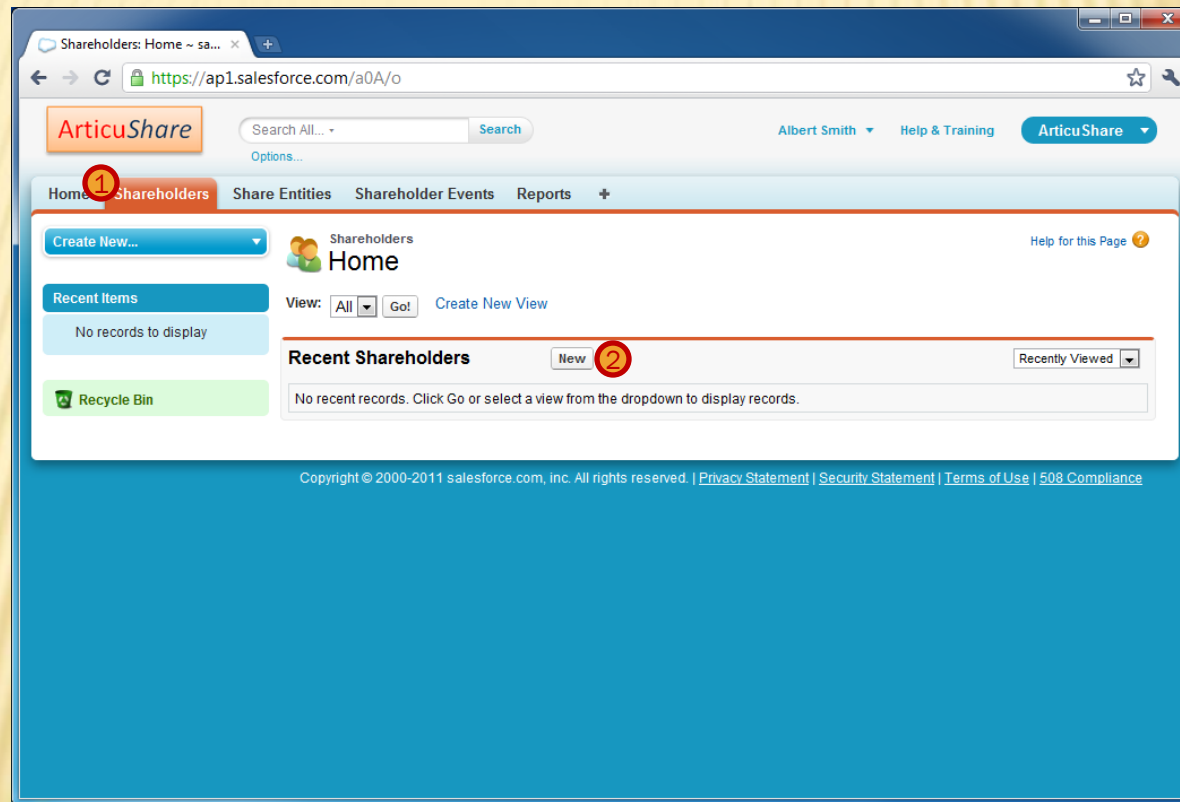
May 15, 2011

CONTENT

- ✕ Add Shareholder
- ✕ Add Entity
- ✕ Add Event
- ✕ Get Contact Details
- ✕ Send Notification Email
- ✕ Reports

CREATE NEW SHAREHOLDER

- 1 Select the Shareholders tab
- 2 Click New button to create a new Shareholder



CREATE NEW SHAREHOLDER

- ③ Enter shareholder details
- ④ Click Save button

Shareholder Edit: New Sh...

https://ap1.salesforce.com/a0A/e?retURL=%2Fa0A%2Fo

ArticuShare

Search All... Search

Albert Smith Help & Training ArticuShare

Home Shareholders Share Entities Shareholder Events Reports

Create New... Recent Items No records to display Recycle Bin

Shareholder Edit New Shareholder Help for this Page

Shareholder Edit Save Save & New Cancel

Information Required Information

Title Mr. Owner Albert Smith

First Name Jason

Last Name Taylor

Suffix

Remarks

Preferences Preferred Notification Method Email

Address & Contact Details

Street Line 1 12 Taylor Street Email jtaylor@somedomain.com

Street Line 2

Street Line 3

Town or City Taylorville Home Phone

State or Province California Mobile Phone

Zip/Postal Code 12345 Work Phone

Country USA

Save Save & New Cancel

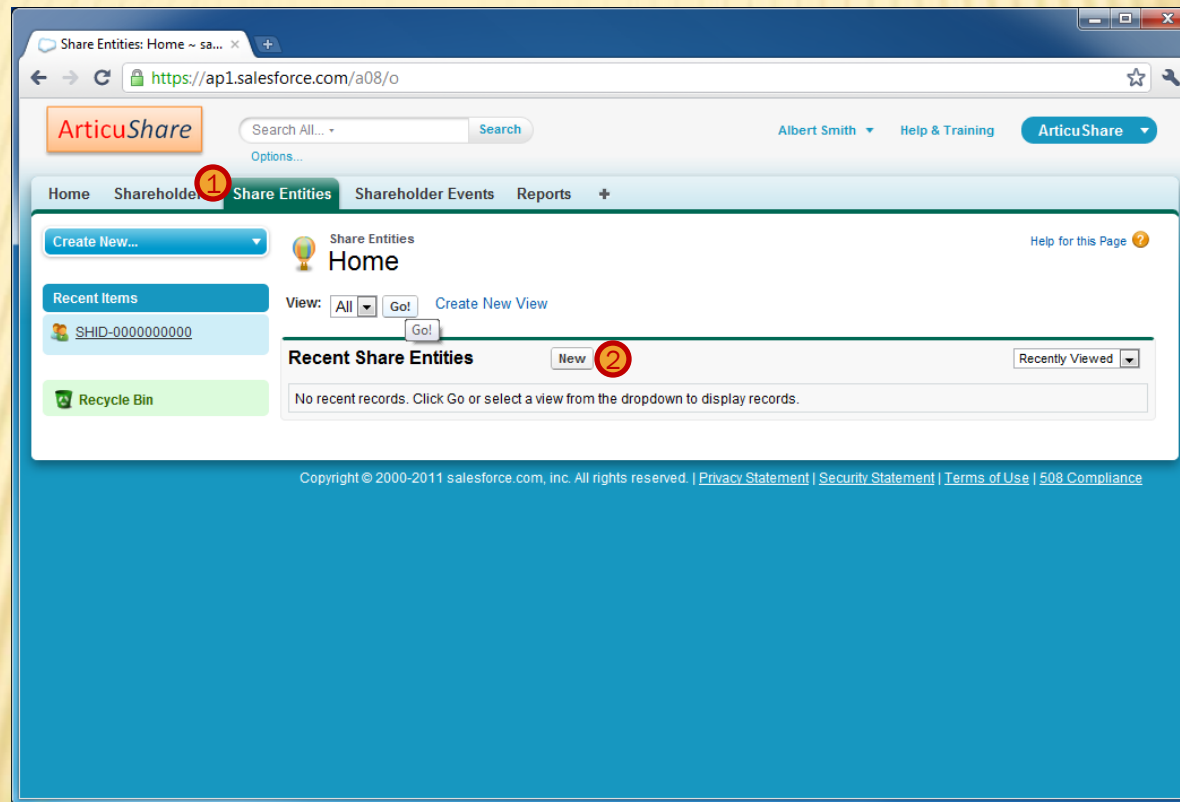
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CONTENT

- ✕ Add Shareholder
- ✕ Add Entity
- ✕ Add Event
- ✕ Get Contact Details
- ✕ Send Notification Email
- ✕ Reports

CREATE NEW ENTITY

- 1 Select the Share Entities tab
- 2 Click New button to create a new Entity



CREATE NEW ENTITY

- ③ Enter entity details
- ④ Click Save button

Share Entity Edit: New Sh...

https://ap1.salesforce.com/a08/e?retURL=%2Fa08%2Fo

ArticuShare Search All... Search Albert Smith Help & Training ArticuShare

Home Shareholders Share Entities Shareholder Events Reports +

Create New...

Recent Items SHID-0000000000

Recycle Bin

Share Entity Edit New Share Entity Help for this Page

Share Entity Edit Save Save & New Cancel

Information ③ Required Information

Share Entity Name Sydney Tower Owner Albert Smith

Share Entity Code SYT

Description Sydney Tower development project

④ Save Save & New Cancel

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ADD SHAREHOLDERS TO ENTITY

- ⑤ Click New Join Shareholder to Share Entity button to add shareholders to this Entity.

The screenshot displays the ArticuShare web application interface. The browser address bar shows the URL <https://ap1.salesforce.com/a0890000003Qton>. The page title is "Share Entity: SE-0000000000". The main content area is titled "Share Entity SE-0000000000" and includes a "Share Entity Detail" section with fields for Share Entity ID, Name, Code, Description, and Created By. Below this, there are several sections: "Open Activities", "Activity History", "Notes & Attachments", "Join Shareholders to Share Entities", and "Shareholder Events". Each section has a "No records to display" message and a "New" button. A red circle with the number 5 highlights the "New Join Shareholder to Share Entity" button in the "Join Shareholders to Share Entities" section. The footer of the page contains copyright information: "Copyright © 2000-2011 salesforce.com, inc. All rights reserved. | Privacy Statement | Security Statement | Terms of Use | 508 Compliance".

ADD SHAREHOLDERS TO ENTITY

- ⑥ Click lookup icon next to Shareholder field to open the Lookup dialog box
- ⑦ Select the Shareholder in the Lookup dialog box (use the Search field if necessary to locate the Shareholder)
- ⑧ Click the Save button to commit the changes.

The screenshot shows the ArticuShare web application interface. The main page is titled 'New Join Shareholder to Share Entity' and contains a form with two fields: 'Share Entity' (containing 'SE-0000000000') and 'Shareholder' (empty). A red circle with the number 6 is next to the lookup icon on the 'Shareholder' field. Below the form are 'Save', 'Save & New', and 'Cancel' buttons. A red circle with the number 8 is next to the 'Save' button. To the left of the form is a sidebar with 'Recent Items' (listing 'SE-0000000000' and 'SHID-0000000000') and a 'Recycle Bin' section. The top navigation bar includes 'Home', 'Shareholders', 'Share Entities' (active), 'Shareholder Events', and 'Reports'. The top right shows the user 'Albert Smith' and a 'Help & Training' link.

The 'Lookup' dialog box is open, showing a search field and a 'Go!' button. Below the search field is a table titled 'Recently Viewed Shareholders' with columns 'Shareholder ID Number', 'First Name', and 'Last Name'. The table contains one row with the ID 'SHID-0000000000' (marked with a red circle 7), 'Jason', and 'Taylor'. The dialog box also includes a search bar at the top and a 'Go!' button.

Shareholder ID Number	First Name	Last Name
SHID-0000000000	Jason	Taylor

ADD SHAREHOLDERS TO ENTITY

- ⑨ Once you are back in the Share Entity Detail page, notice that the Join Shareholders to Share Entities list now shows the Join record we just created.

The screenshot shows the ArticuShare web application interface. The top navigation bar includes the ArticuShare logo, a search bar, and user information (Albert Smith). The main navigation menu has tabs for Home, Shareholders, Share Entities (selected), Shareholder Events, and Reports. The left sidebar contains a 'Create New...' button, 'Recent Items' (listing SE-0000000000 and SHID-0000000000), and a 'Recycle Bin' button.

The main content area displays the 'Share Entity Detail' for 'SE-0000000000'. The entity details include: Share Entity ID (SE-0000000000), Share Entity Name (Sydney Tower), Share Entity Code (SYT), Description (Sydney Tower development project), and Created By (Albert Smith, 13/04/2011 8:26 PM). The Owner is listed as Albert Smith (Change).

Below the details are sections for 'Open Activities', 'Activity History', 'Notes & Attachments', 'Join Shareholders to Share Entities', and 'Shareholder Events'. The 'Join Shareholders to Share Entities' section is highlighted, showing a table with the following data:

Action	Join Shareholder to Share Entity: Join Shareholder to Share Entity ID	Shareholder ID Number
Del	JSHTSE-0000000000	SHID-0000000000

A red circle with the number 9 is placed over the 'Del' button in the first row of the table. The bottom of the page includes a copyright notice: Copyright © 2000-2011 salesforce.com, Inc. All rights reserved. | Privacy Statement | Security Statement | Terms of Use | 508 Compliance.

CONTENT

- ✕ Add Shareholder
- ✕ Add Entity
- ✕ Add Event
- ✕ Get Contact Details
- ✕ Send Notification Email
- ✕ Reports

ADD EVENT

- 1 Still in the Share Entity Details page, click on the New Shareholder Event button to create a new event for this Entity.

The screenshot shows the ArticuShare web application interface. The top navigation bar includes the ArticuShare logo, a search bar, and user information for Albert Smith. The main content area is titled 'Share Entity Details' for the entity 'SE-0000000000'. The entity details include: Share Entity ID (SE-0000000000), Share Entity Name (Sydney Tower), Share Entity Code (SYT), Description (Sydney Tower development project), and Created By (Albert Smith). The page also features sections for Open Activities, Activity History, Notes & Attachments, and Shareholder Events. In the Shareholder Events section, the 'New Shareholder Event' button is highlighted with a red circle and the number 1. The page footer contains copyright information for 2000-2011 salesforce.com, Inc.

ADD EVENT

- ② Enter the details for this Event
- ③ Click the Save button to persist the details for this new Event.

The screenshot shows a web browser window with the URL https://ap1.salesforce.com/a09/e?CF00N900000011zCI=SE-0000000000&CF00N900000011zCI_lkid=a0890000003Qton&retURL=%2. The page is titled 'ArticuShare' and has a navigation bar with 'Home', 'Shareholders', 'Share Entities', 'Shareholder Events', and 'Reports'. The 'Shareholder Events' tab is selected. On the left, there is a 'Recent Items' section with links to 'SE-0000000000' and 'SHID-0000000000', and a 'Recycle Bin' button. The main content area is titled 'Shareholder Event Edit' and 'New Shareholder Event'. It contains a form with the following fields:

- Event Name: AGM 2011
- Description: Annual General Meeting, 2011
- Start Date/Time: 12/10/2011 8:30 PM (13/04/2011 8:36 PM)
- Finish Date/Time: 12/10/2011 10:00 PM (13/04/2011 8:36 PM)
- Venue: Grand Hyatt Hotel Sydney
- Event Coordinator: Albert Smith
- Share Entity: SE-0000000000

At the bottom of the form, there are three buttons: 'Save', 'Save & New', and 'Cancel'. The 'Save' button is highlighted with a red circle and the number 3. The footer of the page contains the text: 'Copyright © 2000-2011 salesforce.com, inc. All rights reserved. | [Privacy Statement](#) | [Security Statement](#) | [Terms of Use](#) | [508 Compliance](#)'.

ADD EVENT

④ The Shareholder Event Details page displays the details of the newly saved event

The screenshot shows the ArticuShare web application interface. The browser address bar displays <https://ap1.salesforce.com/a099000000v69D>. The page title is "Shareholder Event: SEV-0...". The navigation bar includes "Home", "Shareholders", "Share Entities", "Shareholder Events", and "Reports". The "Shareholder Events" tab is active, showing a "Create New..." button and a "Recent Items" list with three events: SEV-0000000000, SE-0000000000, and SHID-0000000000. The main content area displays the "Shareholder Event Detail" for event SEV-0000000000. A red circle with the number 4 is overlaid on the event ID. The event details include: Shareholder Event ID (SEV-0000000000), Event Name (AGM 2011), Description (Annual General Meeting, 2011), Start Date/Time (12/10/2011 8:30 PM), Finish Date/Time (12/10/2011 10:00 PM), Venue (Grand Hyatt Hotel, Sydney), Event Coordinator (Albert Smith), Share Entity (SE-0000000000), Created By (Albert Smith, 13/04/2011 8:40 PM), and Last Modified By (Albert Smith, 13/04/2011 8:40 PM). Below the details are four sections: "Open Activities" (No records to display), "Activity History" (No records to display), "Notes & Attachments" (No records to display), and "NotificationAddresses" (No records to display). The footer contains copyright information: "Copyright © 2000-2011 salesforce.com, inc. All rights reserved." and links to "Privacy Statement", "Security Statement", "Terms of Use", and "508 Compliance".

CONTENT

- ✕ Add Shareholder
- ✕ Add Entity
- ✕ Add Event
- ✕ Get Contact Details
- ✕ Send Notification Email
- ✕ Reports

GET CONTACT DETAILS

① Still in the Shareholder Event Details page, click on the Get Notification Addresses button

The screenshot displays the ArticuShare web application interface. The top navigation bar includes the ArticuShare logo, a search bar, and user information (Albert Smith). The main navigation menu has tabs for Home, Shareholders, Share Entities, Shareholder Events, and Reports. The current page is 'Shareholder Event Details' for event ID SEV-0000000000. The event details section shows the event name 'AGM 2011', description 'Annual General Meeting, 2011', start and finish times, venue 'Grand Hyatt Hotel Sydney', and the event coordinator 'Albert Smith'. Below this, there are sections for 'Open Activities', 'Activity History', 'Notes & Attachments', and 'NotificationAddresses'. Each section has a 'No records to display' message and a 'Get Notification Addresses' button. A red circle with a '1' highlights the 'Get Notification Addresses' button in the 'NotificationAddresses' section. The footer contains copyright information and links to privacy and security statements.

GET CONTACT DETAILS

- ② The generated Notification Addresses record is added to the list at the end of the Shareholder Event Details page. Click on the Notification Addresses ID to view the record.

The screenshot displays the ArticuShare web application interface. The top navigation bar includes the ArticuShare logo, a search bar, and user information (Albert Smith). The main navigation menu has links for Home, Shareholders, Share Entities, Shareholder Events, and Reports. The 'Shareholder Events' section is active, showing the details for event SEV-0000000000. The event details include the Event Name (AGM 2011), Description (Annual General Meeting, 2011), Start Date/Time (12/10/2011 8:30 PM), Finish Date/Time (12/10/2011 10:00 PM), Venue (Grand Hyatt Hotel, Sydney), and Created By (Albert Smith, 13/04/2011 8:40 PM). Below the event details, there are four tabs: Open Activities, Activity History, Notes & Attachments, and NotificationAddresses. The NotificationAddresses tab is selected, showing a table with one record: 'NADD-0000000000'. A red circle with the number 2 highlights this record. The bottom of the page contains a copyright notice for 2000-2011 salesforce.com, inc. All rights reserved.

GET CONTACT DETAILS

- ③ The Notification Addresses Details page lists the email addresses for all shareholders preferring to be contacted by email
- ④ You can also click on the Refresh Notification Addresses button to retrieve the latest details at any time.

NotificationAddresses Details

NotificationAddresses ID: NADD-0000000000

Shareholder Event: SEV-0000000000

Notify by Email: itaylor@somedomain.com

Missing Email Addresses: (empty)

Notify by Post: (empty)

Missing Postal Addresses: (empty)

Missing Notification Method: (empty)

Created By: Albert Smith, 13/04/2011 9:14 PM

Last Modified By: Albert Smith, 13/04/2011 9:14 PM

Buttons: Edit, Delete, Clone, Refresh Notification Addresses

CONTENT

- ✖ Add Shareholder
- ✖ Add Entity
- ✖ Add Event
- ✖ Get Contact Details
- ✖ Send Notification Email
- ✖ Reports

SEND NOTIFICATION DETAILS

- ① Still in the Notification Addresses Detail page, select and copy the email addresses in the Notify by Email section.
- ② Click on the Shareholder Event ID above the email addresses to return to the Shareholder Event Detail page.

The screenshot displays the 'NotificationAddresses Detail' page in the ArticuShare application. The browser address bar shows the URL <https://ap1.salesforce.com/a0790000000yX7H>. The page header includes the ArticuShare logo, a search bar, and user information for Albert Smith. The main navigation bar shows 'Home', 'Shareholders', 'Share Entities', 'Shareholder Events', and 'Reports'. The left sidebar contains a 'Create New...' button, a 'Recent Items' list with links to SEV-0000000000, SE-0000000000, and SHID-0000000000, and a 'Recycle Bin' section. The main content area shows the 'NotificationAddresses Detail' for ID NADD-0000000000. It includes a 'Back to List: Installed Package' link and buttons for 'Edit', 'Delete', 'Clone', and 'Refresh Notification Addresses'. The details section shows the 'NotificationAddress ID' as NADD-0000000000, the 'Shareholder Event' as SEV-0000000000 (highlighted with a red circle and a red '2' icon), and the 'Notify by Email' as taylor@somedomain.com (highlighted with a red circle and a red '1' icon). The 'Missing Email Addresses' section is empty. The 'Created By' and 'Last Modified By' fields both show Albert Smith, with a timestamp of 13/04/2011 9:14 PM. The bottom of the page has a copyright notice: Copyright © 2000-2011 salesforce.com, inc. All rights reserved. | [Privacy Statement](#) | [Security Statement](#) | [Terms of Use](#) | [508 Compliance](#).

SEND NOTIFICATION DETAILS

③ Click on the Send an Email button to launch the email preparation page.

The screenshot displays the ArticuShare web application interface. The top navigation bar includes the ArticuShare logo, a search bar, and user information (Albert Smith). The main navigation menu has tabs for Home, Shareholders, Share Entities, Shareholder Events, and Reports. The 'Shareholder Events' tab is active, showing a list of events. The 'SEV-0000000000' event is selected, and its details are shown in a table. The table includes fields for Shareholder Event ID, Event Name, Description, Start Date/Time, Finish Date/Time, Venue, Created By, Event Coordinator, Share Entity, and Last Modified By. Below the table, there are sections for Open Activities, Activity History, Notes & Attachments, and NotificationAddresses. The 'Activity History' section contains buttons for Log A Call, Mail Merge, and Send An Email. A red circle with the number 3 is placed over the 'Send An Email' button. The footer of the page contains copyright information and links to Privacy Statement, Security Statement, Terms of Use, and 508 Compliance.

Shareholder Event: SEV-0... x

https://ap1.salesforce.com/a099000000v69D

ArticuShare

Search All... Search

Albert Smith Help & Training ArticuShare

Home Shareholders Share Entities Shareholder Events Reports +

Create New... Shareholder Event SEV-0000000000

Recent Items

SEV-0000000000

SE-0000000000

SHID-0000000000

Recycle Bin

Open Activities (0) | Activity History (0) | Notes & Attachments (0) | NotificationAddresses (1)

Shareholder Event Detail

Edit Delete Clone

Shareholder Event ID SEV-0000000000

Event Name AGM 2011

Description Annual General Meeting, 2011

Start Date/Time 12/10/2011 8:30 PM

Finish Date/Time 12/10/2011 10:00 PM

Venue Grand Hyatt Hotel Sydney

Created By Albert Smith, 13/04/2011 8:40 PM

Event Coordinator Albert Smith

Share Entity SE-0000000000

Last Modified By Albert Smith, 13/04/2011 8:40 PM

Edit Delete Clone

Open Activities

New Task New Event

No records to display

Activity History

Log A Call Mail Merge Send An Email ③

No records to display

Notes & Attachments

New Note Attach File

No records to display

NotificationAddresses

Get Notification Addresses

Action NotificationAddresses ID

Edit Del NADD-0000000000

Always show me more records per related list

Back To Top

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SEND NOTIFICATION DETAILS

- ④ In the Send an Email page, click on the Select Template button
- ⑤ Select the template from the ArticuShare folder (note that you can use your own templates, too)

The screenshot shows the ArticuShare web application interface. The main page is titled 'Send an Email' and contains a form for composing an email. The 'Email Format' is set to 'Text Only'. The 'To' field is empty, and the 'Related To' field is set to 'Shareholder Event'. The 'Additional To' field is empty. The 'CC' field is empty. The 'BCC' field is set to 'hanimassoud@gmail.com'. The 'Subject' field is empty. The 'Body' field is empty. The 'Send' button is highlighted with a red circle and the number 4. The 'Select Template' button is also visible. A dialog box titled 'Select a Template - Google Chrome' is open, showing a list of templates. The 'Folder' dropdown is set to 'ArticuShare'. The table below shows the available templates:

Name	Type	Description
Shareholder: Notification Template	Text	Shareholder event notification template

The 'Shareholder: Notification Template' is highlighted with a red circle and the number 5. The 'Attachments' section at the bottom shows 'no attachments'.

SEND NOTIFICATION DETAILS

- ⑥ Email contents are populated from selected template
- ⑦ Notice that the Attachments are also added from the template

Task: Send an Email - sal... x

https://ap1.salesforce.com/_ui/core/email/author/EmailAuthor

ArticuShare Search All... Search Options...

Albert Smith Help & Training ArticuShare

Home Shareholders Share Entities Shareholder Events Reports +

Create New... Task Send an Email Help for this Page

Recent Items SEV-0000000000 SE-0000000000 SHID-0000000000 Recycle Bin

Send Select Template Attach File Check Spelling Cancel

Edit Email

Email Format Text Only [Switch to HTML]

To [Search]

Related To Shareholder Event SEV-0000000000 [Search]

Additional To [Search]

CC [Search]

BCC [Search]

Subject Shareholder Notification

Body

Dear Shareholder,

We are pleased to invite you to the AGM 2011 at:

Venue: Grand Hyatt Hotel
Sydney
From: 12/10/2011 8:30 PM
To: 12/10/2011 10:00 PM

Event details and proxy form are attached to this email for your information.

If you would like to send a proxy on your behalf, please kindly download and complete the proxy form attached and return to us at the address provided on the form.

We thank you for your ongoing support and look forward to see you at the event.

Send Select Template Attach File Check Spelling Cancel

Attachments Attach File

Action	File	Size	Inline
Del	announcement letter.docx	10KB	☐
Del	proxy form.docx	10KB	☐

SEND NOTIFICATION DETAILS

- ⑥ Paste the email addresses that we copied from the Notification Addresses Detail page earlier, into the BCC as shown in the image below (by using the BCC field we prevent shareholders to see each others email addresses)
- ⑦ You will also need to enter an Additional To email address (we recommend you use the email address of the Event Coordinator so they are copied on all replies).

Task: Send an Email - sal... x

https://ap1.salesforce.com/_ui/core/email/author/EmailAuthor

ArticuShare

Search All... Search

Albert Smith Help & Training ArticuShare

Home Shareholders Share Entities Shareholder Events Reports +

Create New... Task Send an Email

Recent Items

- SEV-0000000000
- SE-0000000000
- SHID-0000000000

Recycle Bin

Send Select Template Attach File Check Spelling Cancel

Edit Email

Email Format: Text Only | Switch to HTML

To: [Empty]

Related To: Shareholder Event SEV-0000000000

Additional To: [Empty]

CC: [Empty]

BCC: jtaylor@somedomain.com

Subject: Shareholder Notification

Body:

Dear Shareholder,

We are pleased to invite you to the AGM 2011 at:

Venue: Grand Hyatt Hotel
Sydney
From: 12/10/2011 8:30 PM
To: 12/10/2011 10:00 PM

Event details and proxy form are attached to this email for your information.

If you would like to send a proxy on your behalf, please kindly download and complete the proxy form attached and return to us at the address provided on the form.

We thank you for your ongoing support and look forward to see you at the event.

Send Select Template Attach File Check Spelling Cancel

Attachments

Attach File

Action	File	Size	Inline
Del	announcement letter.docx	10KB	☐
Del	proxy form.docx	10KB	☐

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SEND NOTIFICATION DETAILS

- ⑧ A copy of the email message is available in the Activity History on the Shareholder Event Detail page and can be viewed at any time

The screenshot displays the ArticuShare web application interface. The top navigation bar includes the ArticuShare logo, a search bar, and user information (Albert Smith). The main navigation menu has tabs for Home, Shareholders, Share Entities, Shareholder Events, and Reports. The 'Shareholder Events' tab is selected, showing a list of events on the left and a detailed view of event 'SEV-0000000000' on the right. The event details include fields for Event ID, Name, Description, Start/Finish Date/Time, Venue, and Created/Last Modified By. Below the event details are four sections: Open Activities, Activity History, Notes & Attachments, and NotificationAddresses. The Activity History section contains a table with columns for Action, Subject, Name, Task, Due Date, Assigned To, and Last Modified Date/Time. A red circle with the number 8 highlights the entry 'Email: Shareholder Notification' in the Subject column. The NotificationAddresses section shows a table with columns for Action and NotificationAddresses ID.

Shareholder Event: SEV-0000000000

Shareholder Event Detail

Shareholder Event ID: SEV-0000000000
Event Name: AGM 2011
Description: Annual General Meeting, 2011
Start Date/Time: 12/10/2011 8:30 PM
Finish Date/Time: 12/10/2011 10:00 PM
Venue: Grand Hyatt Hotel, Sydney
Created By: Albert Smith, 13/04/2011 8:40 PM
Event Coordinator: Albert Smith
Share Entity: SE-0000000000
Last Modified By: Albert Smith, 13/04/2011 8:40 PM

Open Activities

Activity History

Action	Subject	Name	Task	Due Date	Assigned To	Last Modified Date/Time
Edit Del	Email: Shareholder Notification		✓	13/04/2011	Albert Smith	13/04/2011 9:53 PM

Notes & Attachments

NotificationAddresses

CONTENT

- ✕ Add Shareholder
- ✕ Add Entity
- ✕ Add Event
- ✕ Get Contact Details
- ✕ Send Notification Email
- ✕ Reports

REPORTS

- 1 ArticuShare provides several inbuilt reports that are available in the ArticuShare Reports folder within the reports tab.
- 2 Click on the Report Name, for example, “Notify by Email” to view the desired report.

The screenshot shows the ArticuShare Reports interface. The top navigation bar includes 'Home', 'Shareholders', 'Share Entities', 'Shareholder Events', and 'Reports'. The 'Reports' tab is active. On the left, there is a 'Recent Items' section with three items: 'SEV-0000000000', 'SE-0000000000', and 'SHID-0000000000'. Below this is a 'Recycle Bin' section. The main content area is titled 'ArticuShare Reports' and shows a list of reports. A red circle with the number 1 points to the 'ArticuShare Reports' folder. Below the folder, there is a table of reports. A red circle with the number 2 points to the 'Notify by Email' report.

Action	Report Name	Description	Last Modified By	Last Modified Date
Edit Del Export	Missing Notification Pref by Entity	My Share Entities with Shareholders with no preferred Notification Method	Massoud, Hani	13/04/2011 1:59 PM
Edit Del Export	Missing Notification Preference	My Shareholders with no preferred Notification Method	Massoud, Hani	13/04/2011 1:59 PM
Edit Del Export	Notify by Address	My Shareholders with Address as preferred Notification Method	Massoud, Hani	13/04/2011 1:59 PM
Edit Del Export	Notify by Address by Share Entity	My Share Entities with Shareholders with Address as Preferred Notification Method.	Massoud, Hani	13/04/2011 1:59 PM
Edit Del Export	Notify by Email	My Shareholders with Email as preferred Notification Method	Massoud, Hani	13/04/2011 1:59 PM
Edit Del Export	Notify by Email by Share Entity	My Share Entities with Shareholders with Email as Preferred Notification Method	Massoud, Hani	13/04/2011 1:59 PM
Edit Del Export	Shareholders	My Shareholders	Massoud, Hani	13/04/2011 1:59 PM
Edit Del Export	Shareholders by Entity	My Share Entities' Shareholders	Massoud, Hani	13/04/2011 1:59 PM

REPORTS

- ③ Generated reports can be further tailored through Report Options and Customization features
- ④ In addition, the data can be Exported to external programs such as Microsoft Excel for further analysis and for traditional mail merge

Notify by Email ~ salesfo... x

https://ap1.salesforce.com/00090000001YuOC

ArticuShare Search All... Search Albert Smith Help & Training ArticuShare

Home Shareholders Share Entities Shareholder Events Reports +

Notify by Email

Report Generation Status: Complete

Report Options:

Summarize information by: --None-- Show: My shareholders

Time Frame

Date Field: Shareholder: Created Date Range: Custom

From: To:

Run Report Hide Details Customize Save As Printable View Export Details

Filtered By: Edit Preferred Notification Method equals Email Clear

Shareholder: Shareholder ID Number	First Name	Last Name	Email
SHID-0000000000	Jason	Taylor	jtaylor@somedomain.com

Grand Totals (1 record)

Confidential Information - Do Not Distribute

REPORTS

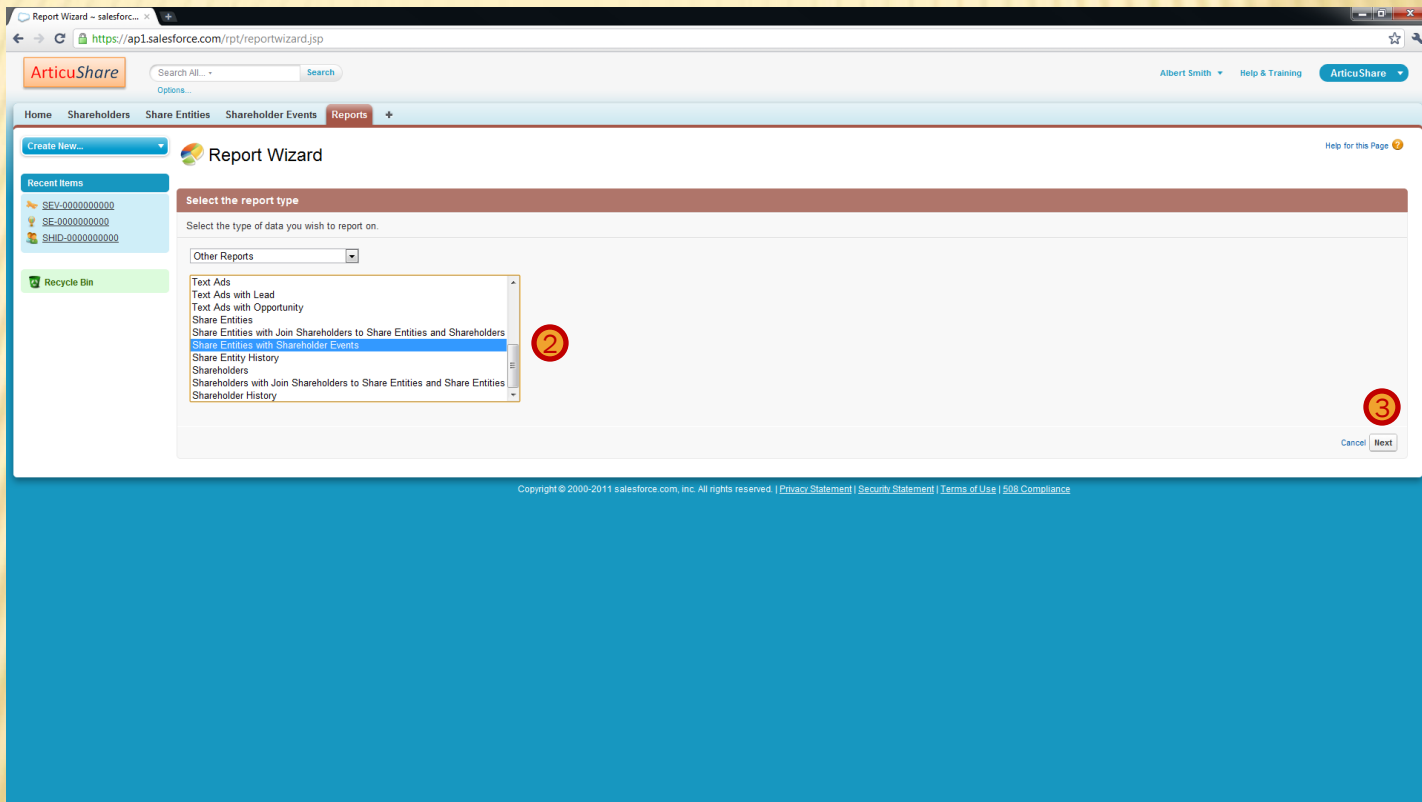
- 1 In addition to the inbuilt reports, you can create your own reports by clicking on the Create New Custom Report button.

The screenshot shows the ArticuShare Reports page. The browser address bar displays <https://ap1.salesforce.com/000?fcf=00190000000TqHk>. The page header includes the ArticuShare logo, a search bar, and user information for Albert Smith. The main navigation bar has tabs for Home, Shareholders, Share Entities, Shareholder Events, and Reports. The Reports tab is active, showing a 'Create New...' button and a 'Recent Items' list. The main content area displays a table of reports with the following columns: Action, Report Name, Description, Last Modified By, and Last Modified Date. A red circle with the number 1 highlights the 'Create New Custom Report' button. The table lists several reports, including 'Missing Notification Pref by Entity', 'Missing Notification Preference', 'Notify by Address', 'Notify by Address by Share Entity', 'Notify by Email', 'Notify by Email by Share Entity', 'Shareholders', and 'Shareholders by Entity'. The footer of the page contains copyright information: Copyright © 2000-2011 salesforce.com, inc. All rights reserved. | [Privacy Statement](#) | [Security Statement](#) | [Terms of Use](#) | [508 Compliance](#).

Action	Report Name	Description	Last Modified By	Last Modified Date
Edit Del Export	Missing Notification Pref by Entity	My Share Entities with Shareholders with no preferred Notification Method	Massoud, Hani	13/04/2011 1:59 PM
Edit Del Export	Missing Notification Preference	My Shareholders with no preferred Notification Method	Massoud, Hani	13/04/2011 1:59 PM
Edit Del Export	Notify by Address	My Shareholders with Address as preferred Notification Method	Massoud, Hani	13/04/2011 1:59 PM
Edit Del Export	Notify by Address by Share Entity	My Share Entities with Shareholders with Address as Preferred Notification Method.	Massoud, Hani	13/04/2011 1:59 PM
Edit Del Export	Notify by Email	My Shareholders with Email as preferred Notification Method	Massoud, Hani	13/04/2011 1:59 PM
Edit Del Export	Notify by Email by Share Entity	My Share Entities with Shareholders with Email as Preferred Notification Method	Massoud, Hani	13/04/2011 1:59 PM
Edit Del Export	Shareholders	My Shareholders	Massoud, Hani	13/04/2011 1:59 PM
Edit Del Export	Shareholders by Entity	My Share Entities' Shareholders	Massoud, Hani	13/04/2011 1:59 PM

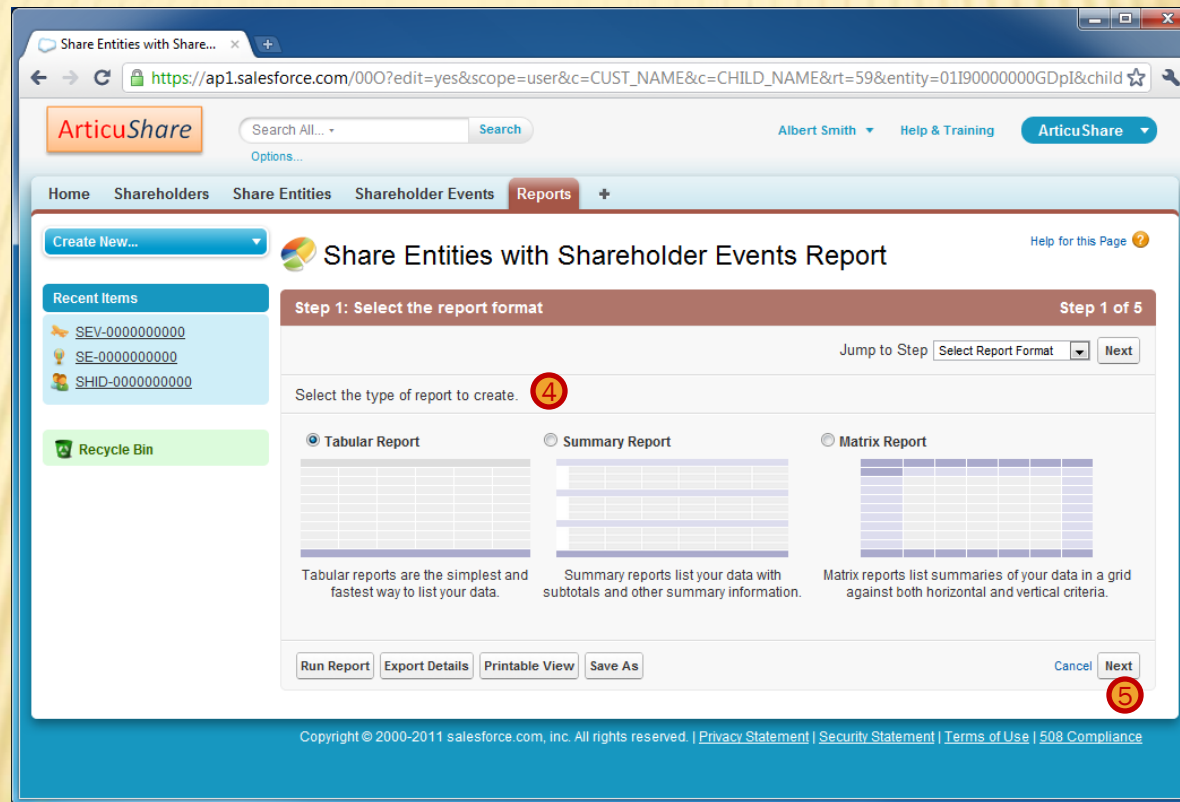
REPORTS

- ② In the Report Wizard, select the Report Type
- ③ Click the Next button to continue



REPORTS

- ④ Select the Report Format
- ⑤ Click Next when you are done



REPORTS

- ⑥ Select the Report Columns
- ⑦ Click Next again when you are done

Share Entities with Shareholder Events Report

Step 2: Select the report columns

Jump to Step: Select Columns Next

Select the columns to include in your report. ⑥

[Select All Columns](#) | [Deselect All Columns](#)

Share Entity: Info			
☐ Share Entity: ID	☒ Share Entity: Share Entity ID	☐ Description	☐ Share Entity Code
☐ Share Entity Name	☐ Share Entity: Owner Name	☐ Share Entity: Owner Alias	☐ Share Entity: Owner Role
☐ Share Entity: Created By	☐ Share Entity: Created Alias	☐ Share Entity: Created Date	☐ Share Entity: Last Modified By
☐ Share Entity: Last Modified Alias	☐ Share Entity: Last Modified Date	☐ Share Entity: Last Activity Date	

Shareholder Event: Info			
☐ Shareholder Event: ID	☒ Shareholder Event: Shareholder Event ID	☐ Description	☐ Event Coordinator
☐ Event Name	☐ Finish Date/Time	☐ Start Date/Time	☐ Venue
☐ Shareholder Event: Created By	☐ Shareholder Event: Created Alias	☐ Shareholder Event: Created Date	☐ Shareholder Event: Last Modified By
☐ Shareholder Event: Last Modified Alias	☐ Shareholder Event: Last Modified Date	☐ Shareholder Event: Last Activity Date	

[Run Report](#) [Export Details](#) [Printable View](#) [Save As](#) [Cancel](#) [Next](#) ⑦

REPORTS

- ⑧ Optionally, add Summary Fields
- ⑨ Click Next when you are ready to move on

Share Entities with Share...

https://ap1.salesforce.com/000

ArticuShare Search All... Search Albert Smith Help & Training ArticuShare

Home Shareholders Share Entities Shareholder Events Reports

Create New...

Recent Items

- SEV-0000000000
- SE-0000000000
- SHID-0000000000

Recycle Bin

Share Entities with Shareholder Events Report

Step 3 of 5

Jump to Step Select Columns to Total Next

Select the summary information and summary type.

⑧

Standard Summary Fields				
Date Field	Sum	Average	Largest Value	Smallest Value
Record Count	☐			

Run Report Export Details Printable View Save As

Cancel Next

⑨

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REPORTS

- 1 Optionally, order the report columns
- 2 Click Next to move on

The screenshot shows the ArticuShare web application interface. The browser address bar displays <https://ap1.salesforce.com/000>. The page title is "Share Entities with Shareholder Events Report". The navigation bar includes "Home", "Shareholders", "Share Entities", "Shareholder Events", and "Reports". The left sidebar contains "Create New...", "Recent Items" (with links to SEV-0000000000, SE-0000000000, and SHID-0000000000), and "Recycle Bin". The main content area is titled "Step 4: Order the report columns" and "Step 4 of 5". It includes a "Jump to Step" dropdown menu and a "Next" button. The "Report Column Order" section shows a list of "Selected Columns": "Share Entity: Share Entity ID" and "Shareholder Event: Shareholder Event ID". To the right of the list are controls for "Top", "Up", "Down", and "Bottom". A red circle with the number "1" is placed over the "Up" button. At the bottom right, there are "Run Report", "Export Details", "Printable View", and "Save As" buttons, along with a "Cancel" button and a "Next" button. A red circle with the number "2" is placed over the "Next" button. The footer contains the copyright notice: "Copyright © 2000-2011 salesforce.com, inc. All rights reserved. | Privacy Statement | Security Statement | Terms of Use | 508 Compliance".

REPORTS

- Optionally set criteria
- Finally, click Run Report when you are done

Share Entities with Shareholder Events Report

Step 5: Select your report criteria

Select criteria to determine which records display.

Standard Filters

Show: My share entities Date Field: Share Entity: Created Date Range: Custom

From: To:

Field Filters

Field	Operator	Value	
--None--	equals		AND
--None--	equals		AND
--None--	equals		AND
--None--	equals		AND
--None--	equals		

Limit Rows

Limit the number of rows displayed in this report. For example: "Top 10 accounts by account revenue."

Rows to Display: All

Advanced Settings

☐ Hide report details

Run Report Export Details Printable View Save As

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REPORTS

- ⑤ The report we developed is generated and shown
- ⑥ It can be further customized as desired.

The screenshot displays the ArticuShare web application interface. The browser address bar shows the URL <https://ap1.salesforce.com/000>. The application header includes the ArticuShare logo, a search bar, and user information for Albert Smith. The main navigation bar highlights the 'Reports' section.

The report title is 'Share Entities with Shareholder Events Report', marked with a red circle ⑤. Below the title, the 'Report Generation Status' is 'Complete'. The 'Report Options' section includes a 'Summarize information by' dropdown set to '--None--', a 'Show' dropdown set to 'My share entities', and a 'Time Frame' section with a 'Date Field' dropdown set to 'Share Entity: Created Date' and a 'Range' dropdown set to 'Custom'. The 'Time Frame' section also includes 'From' and 'To' input fields.

Below the report options, there are buttons for 'Run Report', 'Hide Details', 'Customize', 'Save As', 'Printable View', and 'Export Details'. A red circle ⑥ is placed over the 'Customize' button.

The report results are displayed in a table with the following data:

Share Entity: Share Entity ID	Shareholder Event: Shareholder Event ID
SE-0000000000	SEV-0000000000
Grand Totals (1 record)	

At the bottom of the page, there is a footer with the text 'Confidential Information - Do Not Distribute' and a copyright notice: 'Copyright © 2000-2011 salesforce.com, inc. All rights reserved. | Privacy Statement | Security Statement | Terms of Use | 508 Compliance'.

ArticuShare v1.1

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www.commerity.com/profile/hani

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