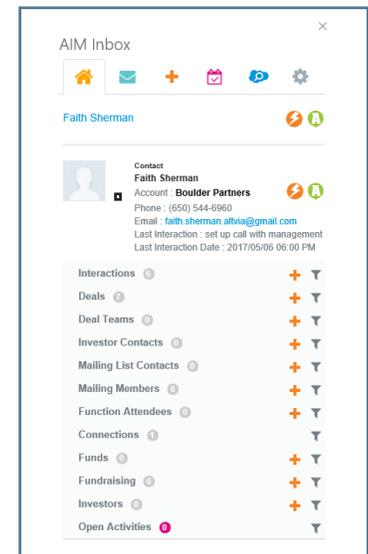
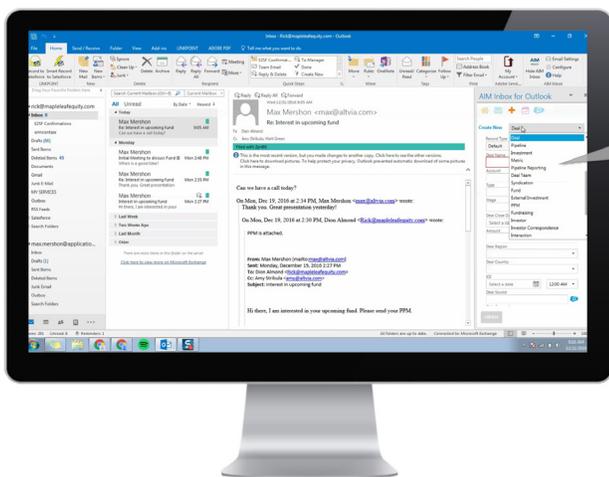


AIM INBOX

CONNECT YOUR EMAIL TO YOUR CRM SEAMLESSLY

By integrating your email platform with your CRM, information is transmitted to create one centralized system. AIM Inbox maintains updated contact information, recent email communications and meetings, and all client interactions with your emails and website. Even better, AIM Inbox integrates with email platforms you are already familiar with – Gmail or Outlook. No more alternating between systems or using outdated information. AIM Inbox increases productivity and allows you to access better information, faster.



KEY BENEFITS



SIMPLE INTEGRATION

Integrate Microsoft Outlook and Gmail with AIM, the premier CRM for private equity



UPDATE INFORMATION

Create or update AIM client records without ever leaving Outlook or Gmail



EASY ACCESS

Convenient access to your contact information, anytime, anywhere with your email client



EMAIL IQ

Gain insights to how your contacts are interacting with your communications with email open and website visit analytics



AUTO FILE

Simply click one button to automatically add new contacts and emails to AIM



360 VIEW

Search any record in AIM directly from Outlook or Gmail and know the most recent interaction



OUR SOLUTION

At Altvia, we created a seamless integration with Microsoft Outlook or Gmail to easily view, create or edit your CRM data without ever leaving your email. Built on the Salesforce Platform and powered by Zynbit, AIM Inbox will improve data integrity, enabling more effective decision-making and eliminating disconnected workflows for greater operational efficiency. Feel confident with your CRM data, knowing it's accurate and up to date. As your partner, Altvia enables your firm to harness and translate data into institutional knowledge giving you the competitive advantage to achieve success.

AIM Inbox by Zynbit offers users the opportunity to create and edit data directly, so you don't need to exit your email to create a new deal or update your records.

-JEFF WILLIAMS, VP OF PRODUCTS, ALTVIA

WHY CHOOSE ALTVIA?

A HOLISTIC SYSTEM

Our software and services support internal and external teams and provide a path to hundreds of integrations to support client's business growth.

PREMIUM SERVICES

We have a team of experts, with decades of experience, who work with clients to support system adoption, change management, and unique business needs.

BUILT ON SALESFORCE

Altvia is a private equity solution, built on top of the #1 CRM platform in the world, Salesforce.

13
Years in
Business

2
Global Offices
(US and UK)

2,300+
Users

170+
Clients

See How Altvia Works

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