

Complete and return this form to marketlinksupport@issmarketintelligence.com

Client Information

Company Name			
Client Name	Title/Role	Phone	Email
CRM Used:	HubSpot	MS Dynamics	Salesforce DealCloud
Frequency:	Weekly	Monthly	
CRM Org ID:			

Checklist Items

Initial Setup

- Verify HubSpot Edition:** Ensure your HubSpot license is either Professional or Enterprise.
- Back Up:** CRM data before updating CRM Firm and Rep records. This is optional but highly recommended at each stage of the integration onboarding process.
- Establish CRM Connection:** Connect your CRM system to the MarketLink CRM application.
- Define Company Technical Properties:** Create and configure technical properties for company records.
- Define Contact Technical Properties:** Create and configure technical properties for contact records.
- Map MarketPro Fields:** Use the Data Guide to select MarketPro fields for integration mapping.
- Add Internal Names to Data Guide:** Create company and contact properties, then add their Internal Names to the Data Guide.

Workflow Settings

- Specify Primary Association:** Identify the primary association for dually registered representatives.
 - Broker-Dealer
 - Investment Adviser
- Define CRM Hierarchy Preference:** Provide ISS MI with your preferred CRM structure:
 - Structure - HQ → All reps under firm.
 - Branch Structure - HQ → Branches → Reps under firm or branch.
- Enable Contact Movement:**
 - Fully open movement.
 - Define movement criteria for specific firms only.
- Create New Records:**
 - Schedule a call with your Client Success Manager to define the target audience using filters from the Data Guide.

Duplicates

- De-duplicate MarketCleanse Results**
 - Ensure all MarketCleanse results are de-duplicated before updating records. The integration relies on unique industry IDs for accuracy.
- Assign Unique Integration IDs**
 - Each Company and Contact record must have a single, unique integration ID. This prevents conflicts during data syncing.
- Handle Duplicate Records Strategically**
 - If duplicates must be addressed later, assign an integration ID to only one of the duplicate records. This allows the integration process to begin without disruption.