MarketLink CRM

Customer Admin Guide

ISS MI
MARKET INTELLIGENCE

Table of Contents

Introduction

Welcome to MarketLink CRM.

MarketLink CRM seamlessly integrates your CRM with ISS MI's trusted financial services database, ensuring your records remain accurate, complete, and current allowing you to focus on business growth rather than data maintenance.

Key Benefits of MarketLink CRM:

- Automatic updates for Firms and Financial Professionals (Reps)
- Update Reps that change firms
- Add new financial professionals aligned with your target market
- Access detailed profile data directly within your CRM
- Receive email notifications upon updates and inserts

Installation Checklist for Hubspot

INITIAL STEPS

- Confirm your HubSpot edition. Professional or Enterprise is required.
- Confirm a team member has HubSpot Super Admin access.

CLEANSE

- Send CRM Firm and Rep records to ISS MI for MarketCleanse analysis.
- Review the analysis and approve the MarketCleanse project.
- Perform data cleansing on CRM Firm and Rep records.
- Back up all CRM data before updating CRM Firm and Rep records.
- Apply cleansed data to CRM.
- Back up all CRM data after updating CRM Firm and Rep and before the integration begins.
- Create a sandbox environment if you plan on testing in a lower environment.

INTEGRATIONS

- Connect CRM sandbox or production environment to MarketLink CRM.
- Review the MarketLink CRM Data Guide, Onboarding Checklist and Admin Guide.
- Configure HubSpot according to the Admin Guide.
- Complete the Onboarding Checklist and send it to ISS MI.
- Back up all CRM data prior to starting the integration workflow (Optional).
- Replicate the above steps in the Production environment if needed.
- Check the data to ensure everything looks correct.
- Configures the integration and initiates the first series of workflows on Sandbox or Production.

DATA BACKUP REQUIREMENT

Before proceeding with the app connection and configuration (in the below steps), it is essential to complete the following:

- Back up your CRM data - All CRM data should be backed up before running MarketCleanse and again after MarketCleanse is complete, (but prior to initiating the first integration workflow).

IMPORTANT: To safeguard against data loss and ensure a reliable restore point, this step must be completed without exception. In the event that data restoration becomes necessary, the responsibility for executing the restore process lies solely with the Customer. It is strongly recommended that Customers maintain regular backups and verify their integrity to facilitate a successful recovery if needed.

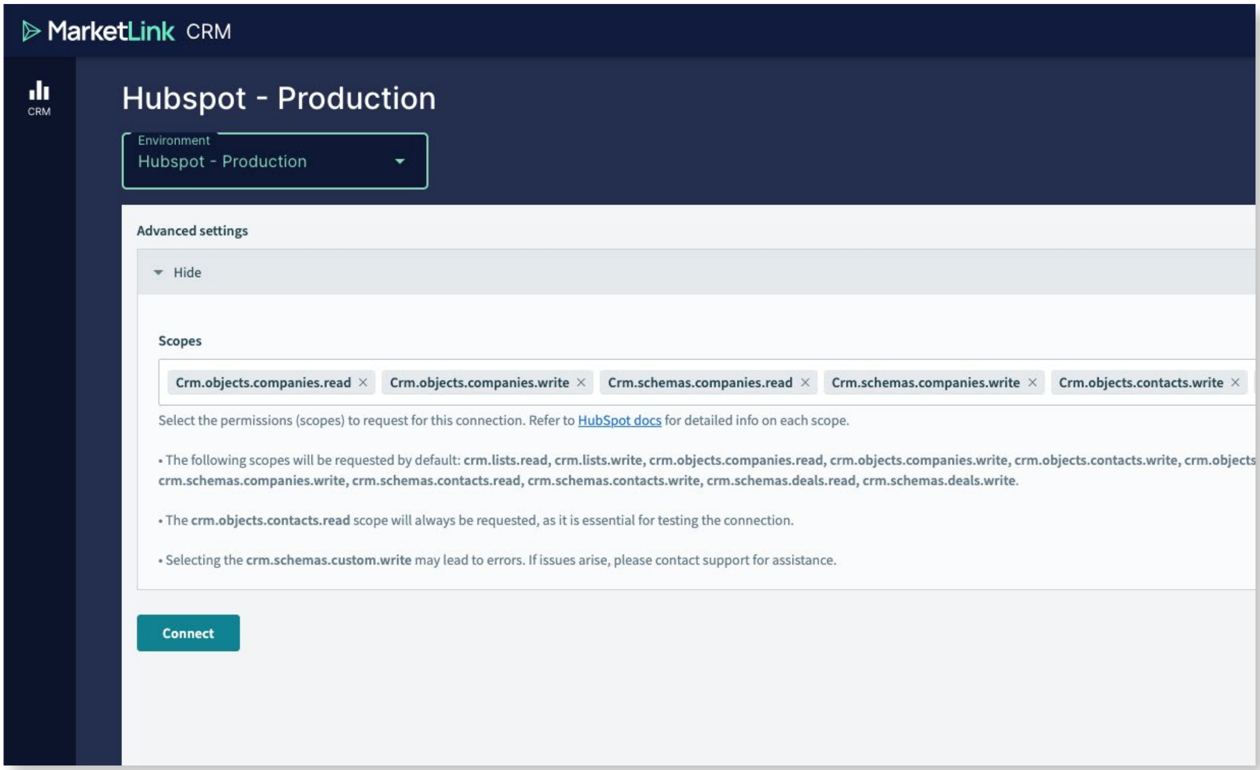
APP AND CONFIGURATION

Account Setup:

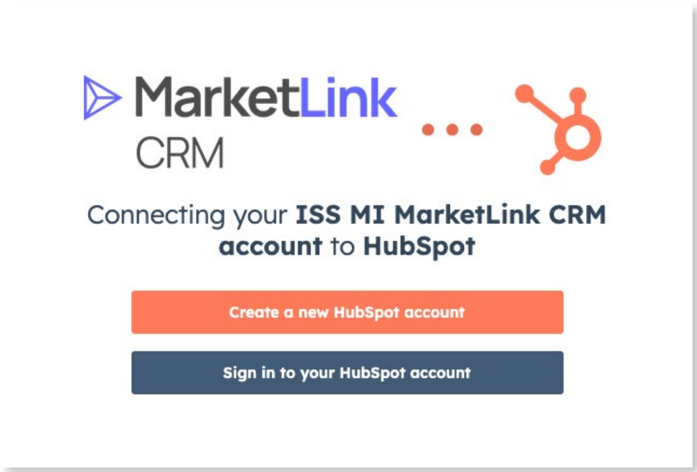
- [ ] Create sandbox account
- [ ] Create production account

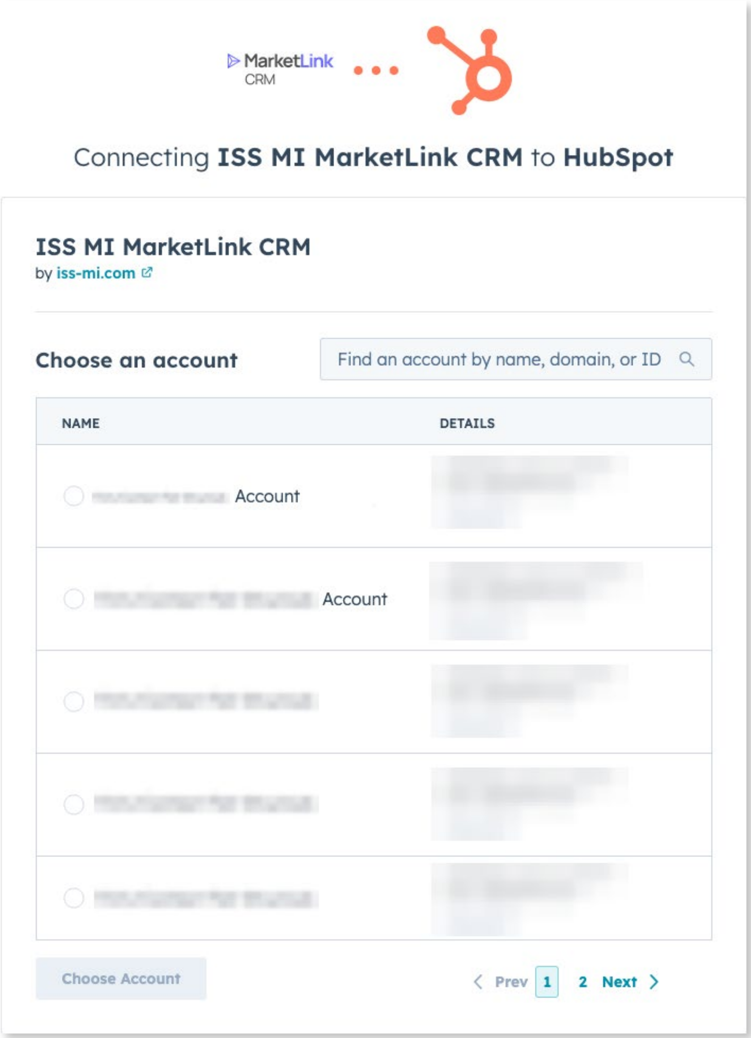
Connect CRM sandbox or production environment to MarketLink CRM App through MarketLink CRM by performing the following steps below.

1. Navigate to the MarketLink CRM Connection Page.
   URL: http://marketlinkcrm.iss-mi.com/
2. Login with credentials.
3. Select the environment to connect from the environment dropdown (sandbox or production).



4. Click “Connect” to bring up the CRM Login page.





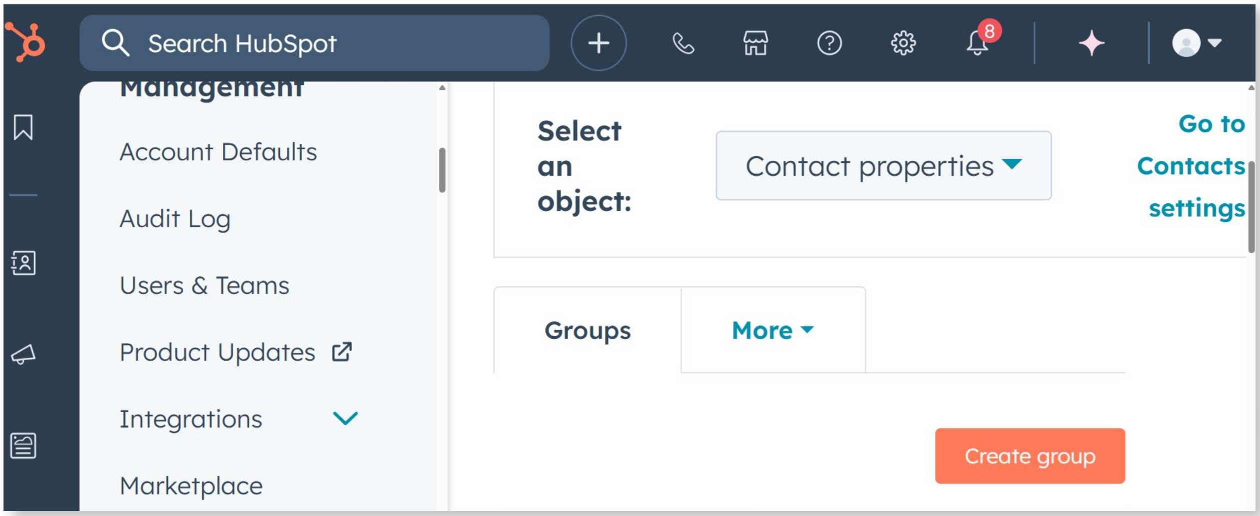
5. Login to your CRM account and select the account to link with the chosen environment.

Create MarketLink CRM Property Group(s)

- [ ] Create a “MarketLink CRM” property group for each (Company and Contact object).

TIP How to Create a Property Group in HubSpot

- Click the settings icon (gear) in the top navigation bar.
- In the left sidebar menu, click Properties.
- At the top, click the Select an object dropdown.
- Click on Contact properties.
- Click the “Groups” Tab.
- Click the Create group button on the upper right.



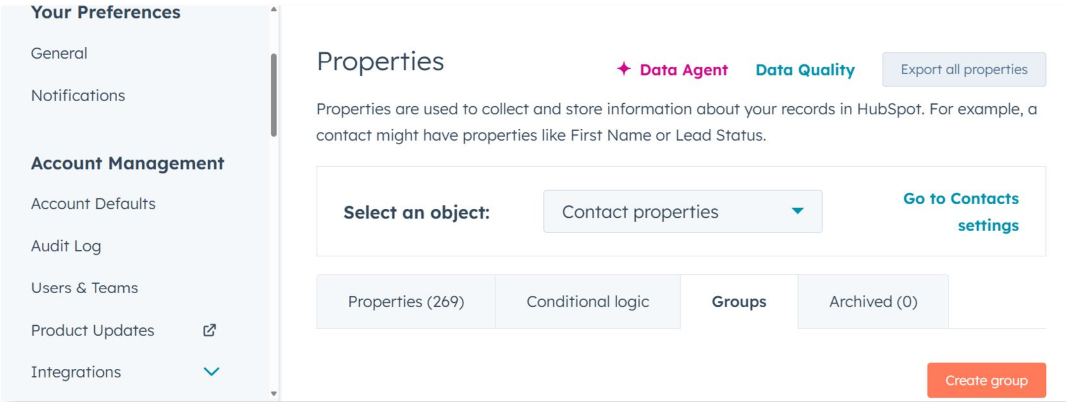
- A dialog pops up. Enter your desired property group name which will be MarketLink CRM.
- Save Your Group.
- Click Save.
- Repeat these steps for Company properties as well.

Create MarketLink CRM Properties

- [ ] Create properties required for sync (objects must have unique identifiers to prevent duplicates). The required properties can be found in the Customer Onboarding Checklist document.
- [ ] Assign the properties to the “MarketLink CRM” group.

TIP How to Create a Contact Properties in HubSpot

- In your HubSpot account, click the settings icon (looks like a gear) in the top navigation bar.
- In the left sidebar menu, find and click Properties.
- At the top of the Properties page, click the dropdown labeled “Select an object.”
- Choose Contact properties from the list.
- In the upper right corner, click Create property.



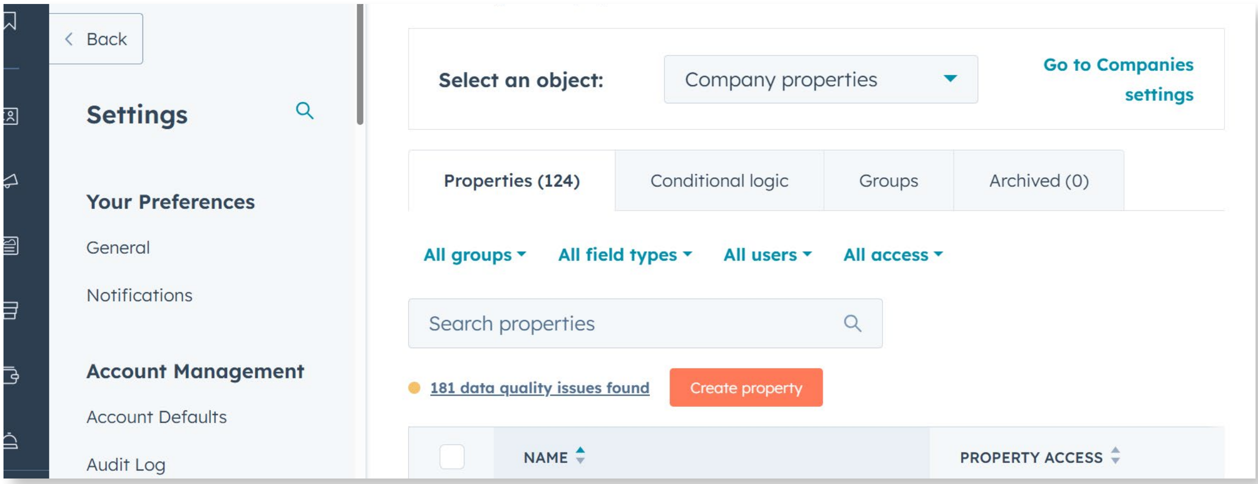
- In the panel that opens:
  - » Select the Object type (Contact should be chosen).
  - » Select the Group MarketLink CRM (which you created in the above steps).
  - » Enter a Label for your new property (refer to the Contact Object Properties Table).
  - » Edit, if needed, the internal_name (located under Property Label) (refer to the Contact Object Properties Table).
    Note: The internal_name is the name used to connect the integration fields not the label.
  - » On the left side of the screen click on Field Type.
  - » Click the Field type dropdown and pick the type of property (refer to the Contact Object Properties Table).
  - » Click Create.
    For Unique Properties (Refer to Contact Object Properties Table)-click Rules on the left side of the screen. Then check the box for “Require unique values for this property.
  - » Repeat these steps for all properties listed in the (Contact Object Properties Table).

CONTACT OBJECT PROPERTIES TABLE

Property Name	Internal Name	Field Type	Unique
Rep CRD	rep_crd	Unformatted Number	True
Firm CRD	firm_crd	Unformatted Number	False
Physical Branch ID	physical_branch_id	Single line text	False
Created from MarketLink	created_from_marketlink	Single Checkbox	False
MarketLink Status	marketlink_status	Single line text	False
MarketLink Update Date	marketlink_update_date	Date Picker	False

TIP How to Create a Company Properties in HubSpot

- In your HubSpot account, click the settings icon (looks like a gear) in the top navigation bar.
- In the left sidebar menu, find and click Properties.
- At the top of the Properties page, click the dropdown labeled “Select an object.”
- Choose Company properties from the list.
- In the upper right corner, click Create property.



- In the panel that opens:
  - » Select the Object type (Company should be chosen).
  - » Select the Group MarketLink CRM (which you created in the above steps).
  - » Enter a Label for your new property (refer to the Company Object Properties Table).
  - » Edit the internal_name (located under Property Label) (refer to the Company Object Properties Table).
    Note: The internal_name is the name used to connect the integration fields not the label.
  - » On the left side of the screen click on Field Type.

- Click the Field type dropdown and pick the type of property (refer to the Company Object Properties Table)
  For Unique Properties (Refer to Company Object Properties Table)-click Rules on the left side of the screen. Then check the box for "Require unique values for this property.
- Click Create.
- Repeat these steps for all properties listed in the (Company Object Properties Table).

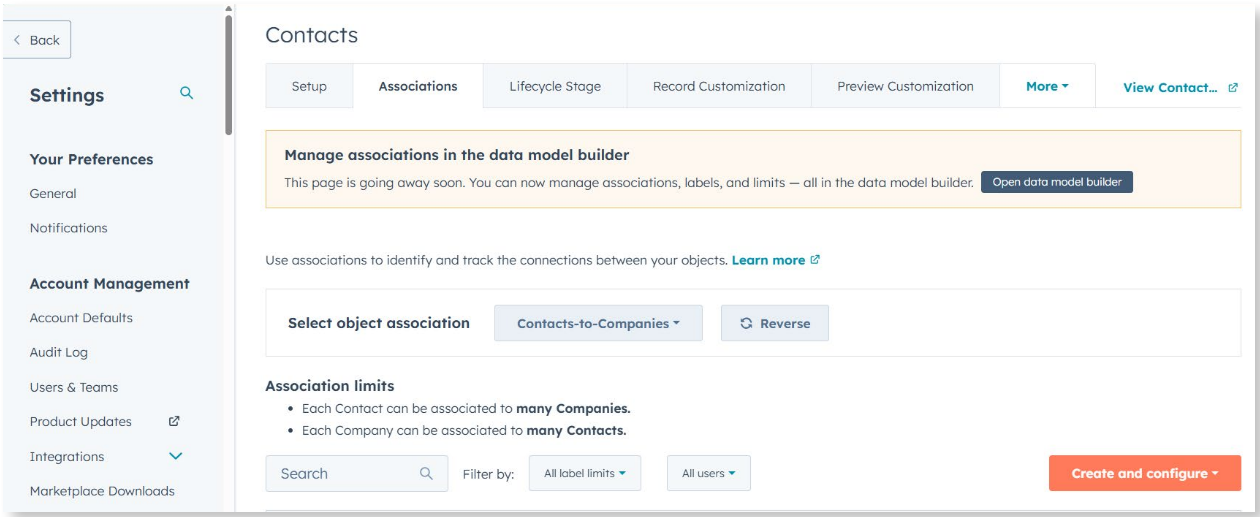
COMPANY OBJECT PROPERTIES TABLE

Property Name	Internal Name	Field Type	Unique
CRD or Physical Branch ID	crd or physical_branch_id	Unformatted Number; Single line text	True
Created from MarketLink	created_from_marketlink	Single Checkbox	False
MarketLink Status	marketlink_status	Single line text	False
MarketLink Update Date	marketlink_update_date	Date Picker	False

Create MarketLink CRM Association Labels

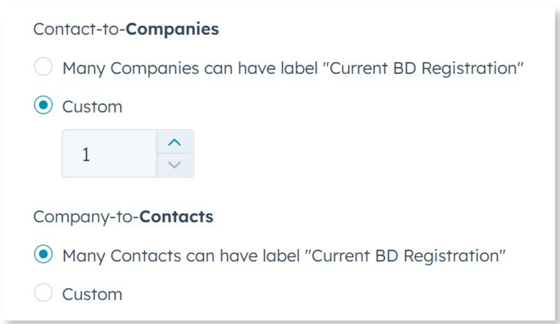
TIP How to Create Association Labels in Hubspot

- In your HubSpot account, click the settings icon (gear) in the top navigation bar.
- In the left sidebar, click Objects.
- Select Contacts.
- In the object's settings, click on the Associations tab.
- Click Create and configure.
- From the menu, select Create and configure label limits.

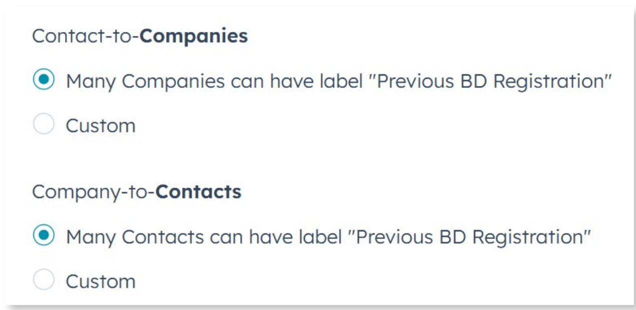


- In the right panel, click the Objects you're associating dropdown and select the object relationship Contacts-to-Companies.
- How many labels do you need?
  - » Pick single label.
  - » Put a label name in the text box (Refer to the Contact-to-Company Association Labels).
- Select Next.
  - » You will be brought to Configure label limit.
  - » Please see the screenshot for each Association label in the Contact-to-Company Association Labels). After entering each one select save.

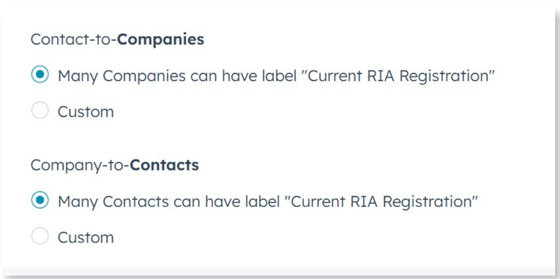
Current BD Registration



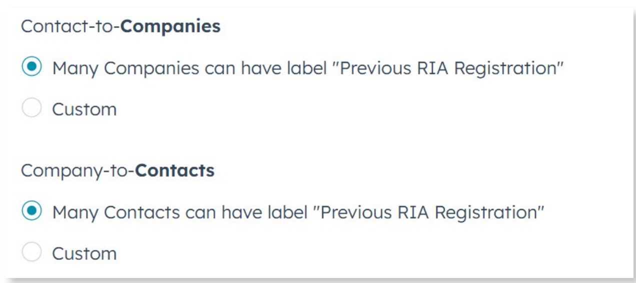
Previous BD Registration



Current RIA Registration



Previous RIA Registration



CONTACT-TO-COMPANY ASSOCIATION LABELS TABLE

Association Label	Limits
Current BD Registration	1-to-1; Inverse: Company to Contact (1-to-Many)
Previous BD Registration	1-to-Many; Inverse: Company to Contact (1-to-Many)
Current RIA Registration	1-to-Many; Inverse: Company to Contact (1-to-Many)
Previous RIA Registration	1-to-Many; Inverse: Company to Contact (1-to-Many)

Field Mapping

- [ ] Select the appropriate fields to map into your CRM based on the specifications outlined in the Data Guide. It is recommended to use custom fields properties to maintain control over data updates. By default, all mapped fields are configured to automatically accept updates, meaning the existing values in your CRM will be replaced with the latest data from ISS MI's MarketPro.

IMPORTANT!
Standard fields update automatically without review, which can lead to unwanted changes. Therefore, it is advised to use custom fields/properties.

Workflows

Update/Sync Workflow

The following actions can occur during a sync process. Typically, syncs are scheduled weekly to align with the release of the published dataset, but they can also be triggered on an ad-hoc basis for testing or other specific needs.

- Existing CRM records with IDs will be updated with the latest ISS MI MarketPro data based on your field mapping and update method.
- Updated records will show as 'Updated' in the MarketLink Status field.
- Primary Firm and BD/RIA Firm registration associations will be updated per the details submitted on the Customer Onboarding Checklist.
- Incorrect Rep/Firm ID combinations will retain existing company associations but may also result in the creation of a primary company as outlined in the Customer Onboarding Checklist.
- NOTE When a Branch office becomes a Headquarter office or vice versa, the integration will not make the switch.
- Rep Movement Scenarios
  - » Movement will occur if this feature was selected on the Customer Onboarding Checklist. The integration creates (if necessary) and associates the Rep to the appropriate Firm or Branch.

Movement To A New Firm/Branch

If the new Firm already exists in the CRM.

If the new Firm is included in the movement criteria per the Customer Onboarding Checklist.

When a Contact moves from one branch to another within the same firm, and an Account for the new branch does not yet exist in your CRM, a new branch Account will be automatically created—regardless of Audience Criteria. The Contact will then be reassigned to the newly created branch Account.

Movement will NOT occur if this feature was not selected on the Customer Onboarding Checklist.

Movement will NOT occur if a Rep moves to a Firm and the new Firm is NOT included in the movement criteria per the Customer Onboarding Checklist.

When no movement occurs, the Firm's original association remains in the CRM, and the MarketLink Status is updated to 'Inactive'.

Insert New Record Workflow

The following actions can occur during a sync process when record inserts have been enabled. Typically, syncs are scheduled weekly to align with the release of the published dataset, but they can also be triggered on an ad-hoc basis for testing or other specific needs.

- Firm and Rep records will be created in the CRM based on the Audience Criteria specified on the Customer Onboarding Checklist. This ensures that only relevant contacts are added, aligning with the client's targeting strategy and data governance standards.
- Primary Firm and BD/RIA Firm registration associations will be updated per the Customer Onboarding Checklist.
  NOTE: Duplicate records will be avoided since the integration is relying on industry ID's.
- Firm registration association of new Firms are only added if not already present in the CRM.

TIP Contact ISS MI to update your Audience Criteria if your target market changes.

Notifications

Upon completion of an update or insert workflow, a notification will be sent detailing the actions performed.

- Recipients identified on the Customer Onboarding Checklist will receive emails once a task has been completed.
- Email notifications include a summary of record counts for updates, inserts, and display and failures that may have occurred.

TIP Firm registration association counts may be higher if a rep is linked to multiple firms.

Job Scheduling

Syncs are typically scheduled weekly to align with the release of the published dataset, but they can also be triggered on an ad-hoc basis for testing or other specific needs.

- Automated weekly updates during off-peak hours.
- On-demand runs for urgent updates or initial imports.

FAQs

GENERAL FUNCTIONALITY

Q: How does the data cleansing process work?

A: MarketCleanse matches your records to ISS MI's extensive historical database of financial firms and professionals. It captures updates such as address changes, firm transitions, name changes, and team affiliations. Once matched, updates, additions, and new records are provided regularly.

Q: What are the main workflows?

A: The sync process includes updating existing Firm and Rep records, reassigning Reps when they change Firms, inserting new Firms and Reps that meet the defined Audience Criteria, and sending email notifications detailing the actions performed.

Q: Do you ever remove firms?

A: No — The workflows only create new Firm associations when applicable.

Q: Do you delete records?

A: No — The workflows only update existing data, create new Firm associations, and insert Firms and Reps that meet the defined Audience Criteria.

Q: Does MarketLink for CRM create duplicates?

A: No — Duplicates may occur if existing CRM records lack CRD/ID's.

Q: Do you merge duplicates?

A: No — Record merging is not performed. Existing records are interacted with as-is, without altering their structure. New Firm associates may be created when applicable.

INTEGRATION AND SYNCING

Q: Do you update all my HubSpot records?

A: No — Records only with unique identifiers (IDs) in the integration fields will be updated.

Q: Can I test the integration?

A: Yes — Initial testing can be conducted in a development environment. Once validated, support will be provided to facilitate a smooth migration to production.

Q: Can I run my sync anytime?

A: Yes — Upon request but typically scheduled to run weekly in-line with weekly data updates.

Sandbox: One-time syncs can be run upon request.
Production: Syncs follow a weekly or monthly schedule based on what level of updates has been purchased. For specific cases, we can run a one-time job.

Q: Can I schedule integration jobs on my own?

A: No — Currently all scheduled jobs are handled by the ISS MI team.

Q: How will I know if my sync or insert job was successful?

A: Email notifications are sent to indicate job success or failure, report any errors, and provide the number of records processed. Currently, in-app notifications are not supported.

Q: What if a data import fails or has errors?

A: An email is sent containing detailed information and a list of failed records to support timely review and correction.

CUSTOMIZATION AND DATA MANAGEMENT

Q: How can I control which CRM fields are updated?

A: The integration will update the fields selected in the Data Guide. All fields will be set to "Automatically Accept Update" to always replace the field values with the latest data.

Q: How many fields should I import?

A: It is recommended to start with 20–40 key fields and expand as needed.

Q: How do I avoid field name conflicts?

A: Follow CRM naming conventions, avoid reserved words, and clearly label IDs (e.g., Firm_ID).

Q: Can you help me build my Audience Criteria?

A: Yes — The ISS MI Customer Success team will work with you to build out your Rep Move and audience criteria.

Need Support?

Please direct any feedback or inquiries to:

marketlinksupport@issmarketintelligence.com