Discovery Data

DISCOVERY DATA MARKETLINK FOR SALESFORCE

Admin Guide

Welcome to Discovery Data MarketLink for Salesforce!

This guide, designed for Salesforce Administrators, introduces Discovery Data MarketLink for Salesforce and helps you through setup, customization, and ongoing maintenance, as well as provides tips and best practices to turn your CRM system into a powerful business management and growth engine.

About MarketLink for Salesforce
MarketLink for Salesforce is the only comprehensive data integration app for Salesforce in the U.S. financial services industry, providing access to registered BD and RIA firms and reps so you can easily populate and maintain accurate and complete data within Salesforce.

About Discovery Data
Discovery Data provides the most accurate and trusted information on the firms and people essential to the financial services and insurance industries. Our data, analytics, and services create actionable intelligence that enable our clients to more effectively target opportunities and execute go-to-market initiatives.

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Introduction

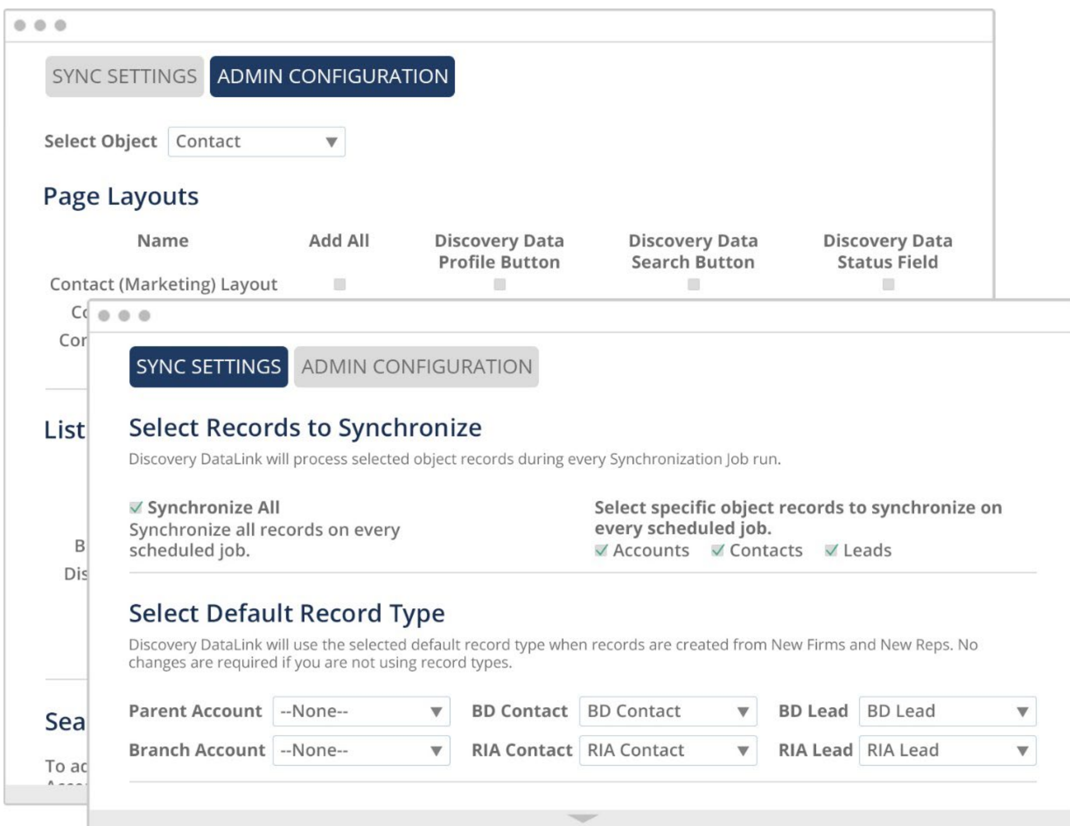
MarketLink for Salesforce solves a number of critical CRM data challenges. How do I keep my current data accurate and complete? How can I eliminate as much manual data entry as possible? How do I automatically bring new records into my target market? How do I keep our CRM users logged in and not jumping from site to site? To help solve these and other data issues, MarketLink for Salesforce was created.

There are four major features within the app:

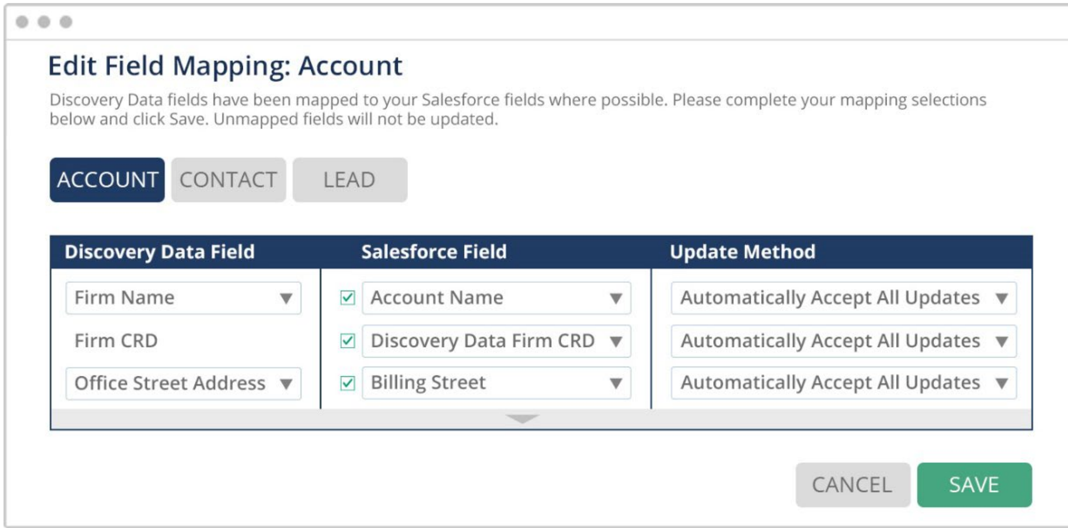
1. Maintain accurate Accounts, Contacts and Leads through weekly updates.
2. Add new firms and reps that meet your target market.
3. Easily add data for new records using Discovery Data Search.
4. View detailed profiles in Discovery Data right from Salesforce.

Here is a quick rundown of the app installation and features:

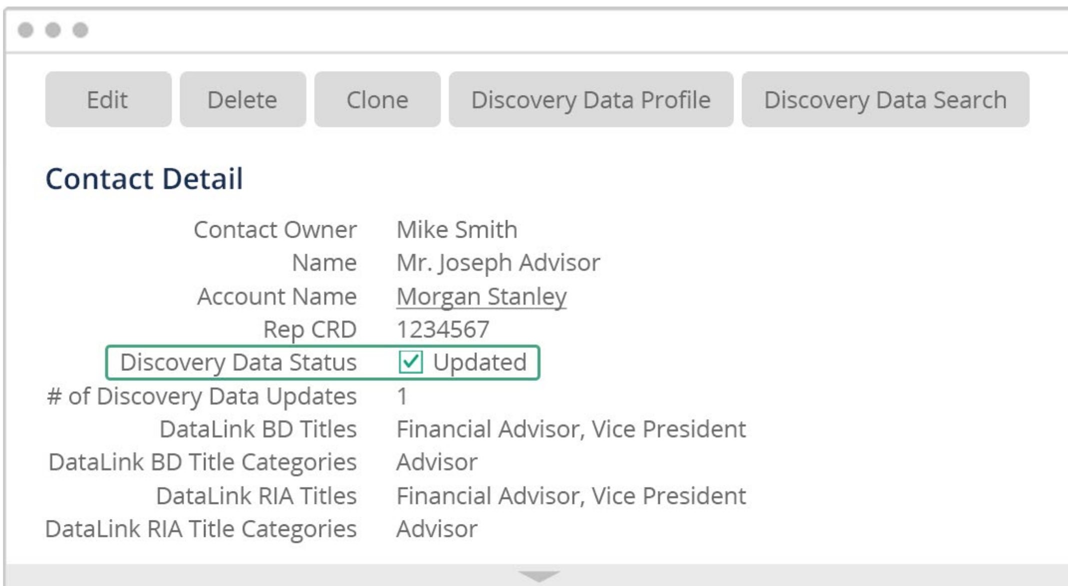
Configure App Settings in Salesforce



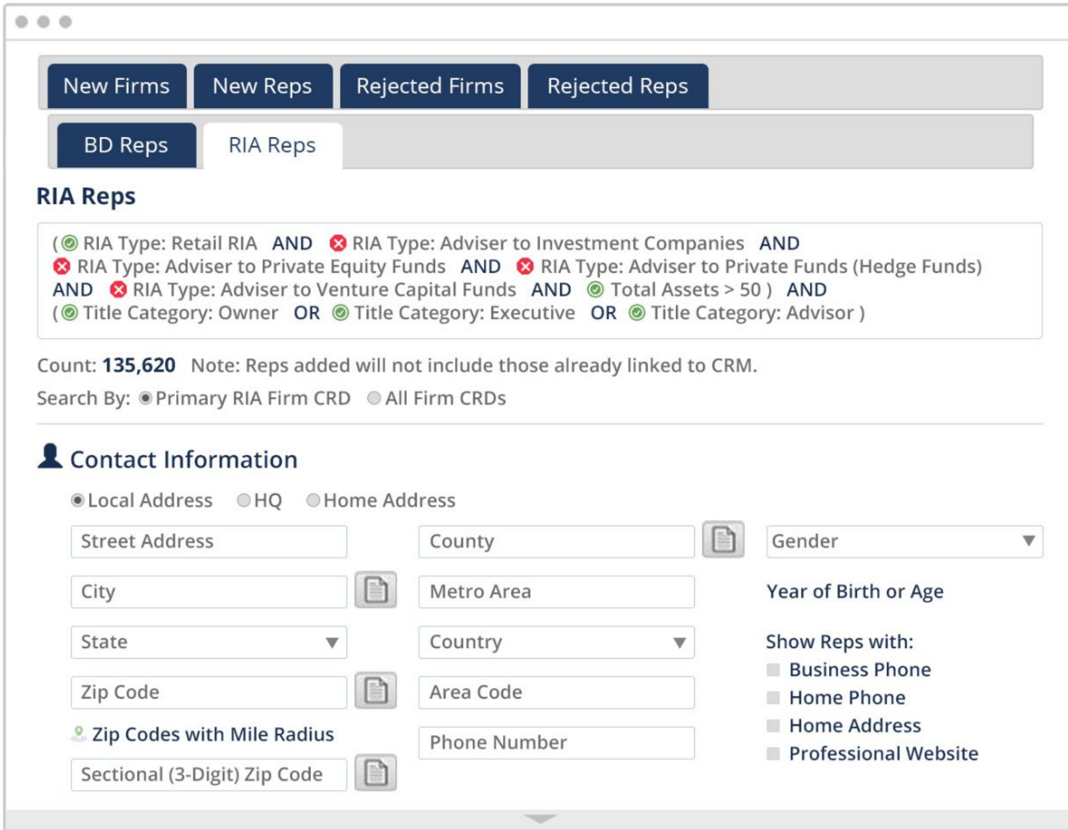
Map Discovery Data Fields to Salesforce Fields



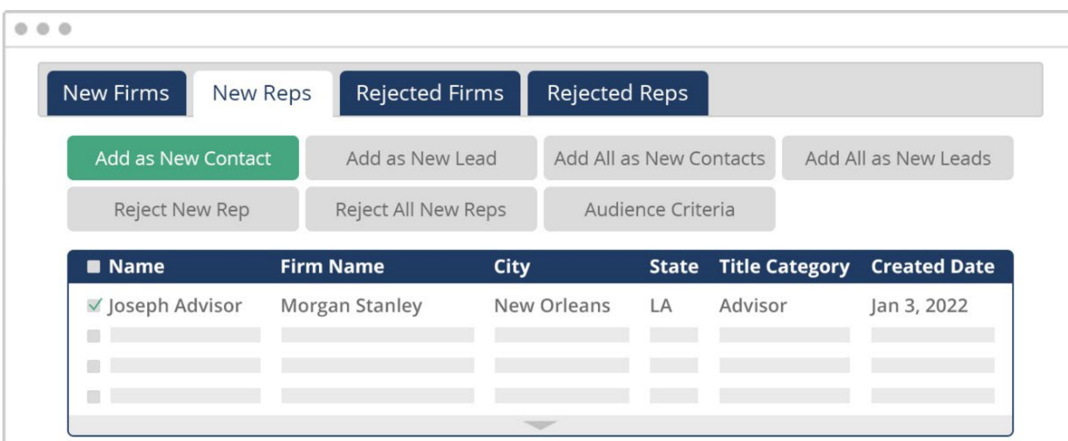
Update Salesforce Fields



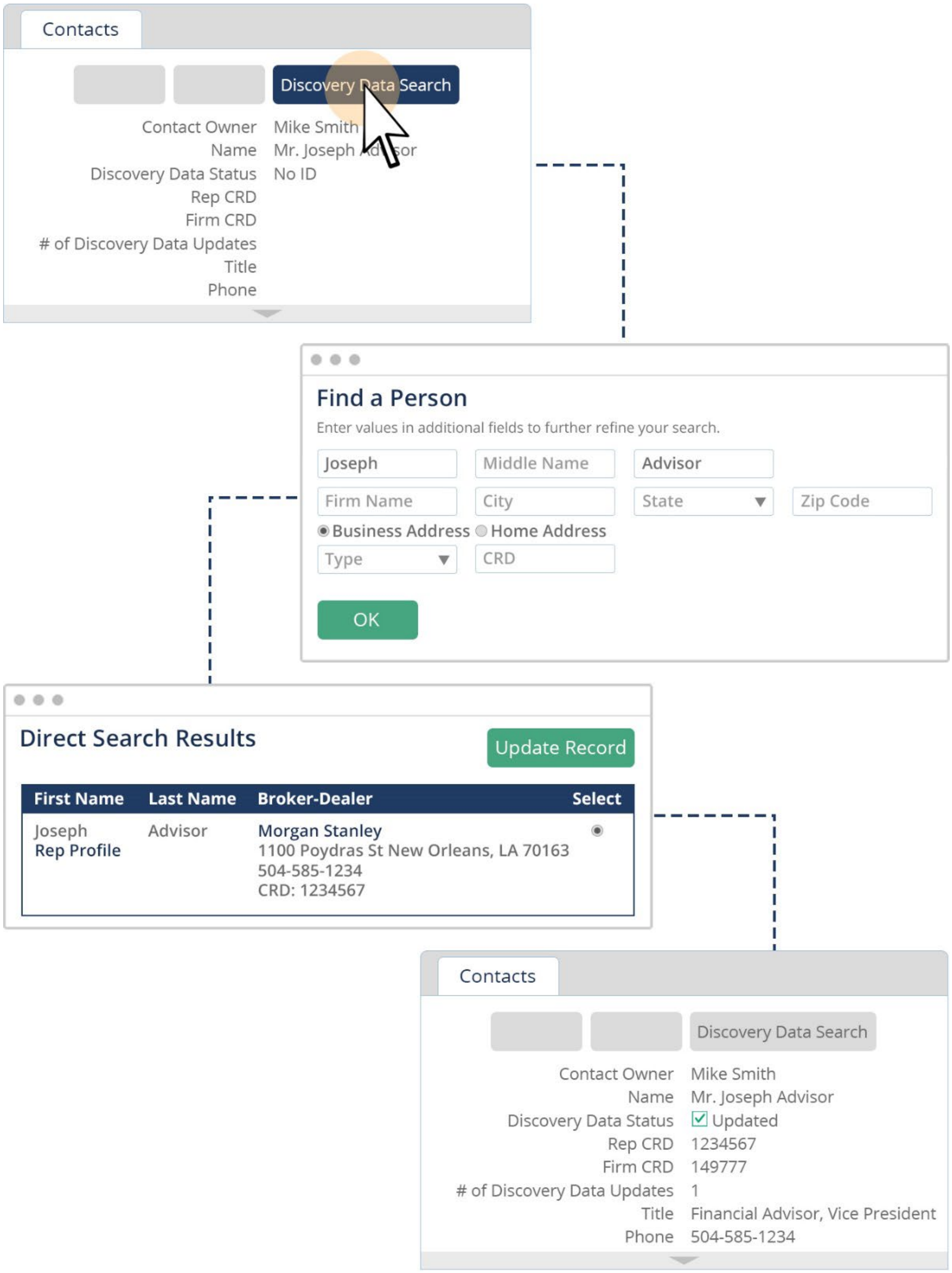
Set Your Target Market with Audience Criteria



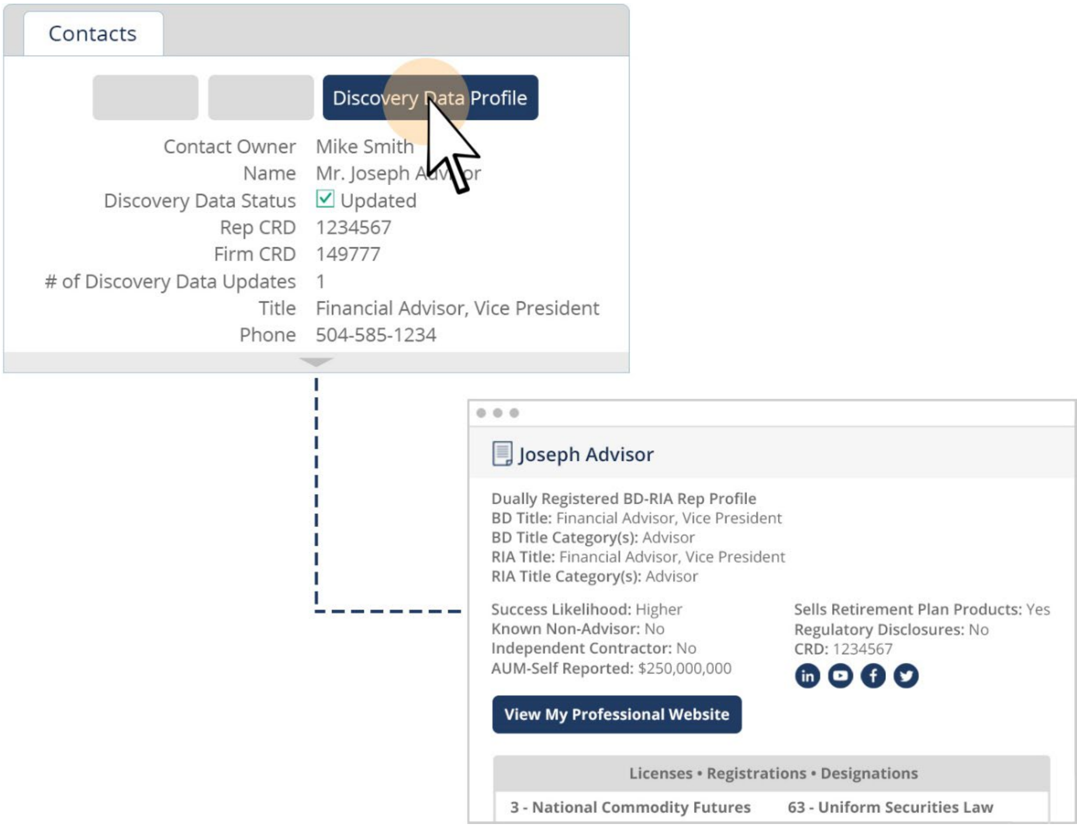
Create New Firms and Reps That Meet Your Target Market



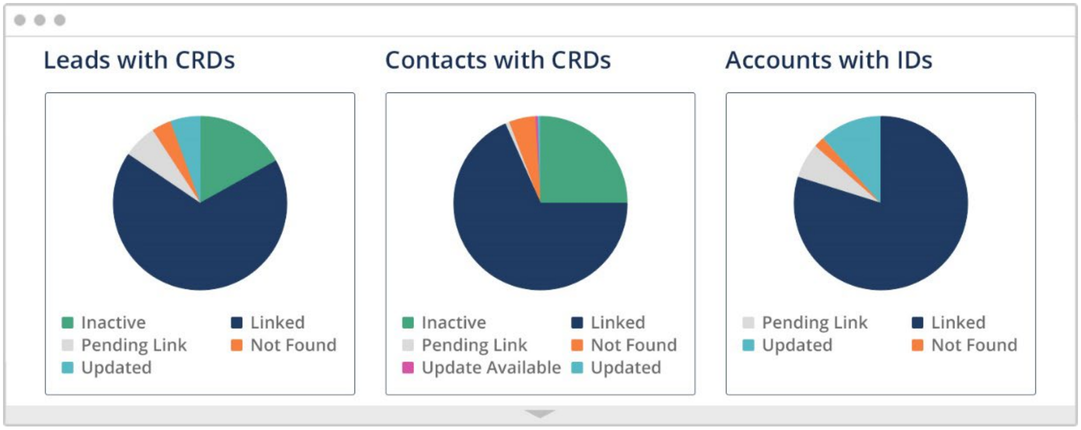
Search in Discovery Data to Populate New Records



View Discovery Data Profiles in Salesforce with One Click



Quickly Know the Status of Your Data with Reports and Dashboards



Now let's get started!

Requirements

Installing MarketLink for Salesforce is relatively easy, but before it is installed into a Salesforce sandbox or production environment it is necessary to have the correct business and IT resources engaged to ensure that MarketLink for Salesforce is configured, tested and deployed properly. It is recommended that the following types of resources be available throughout the project:

- Salesforce Administrator (preferably Salesforce Certified)
- IT Resource with Salesforce knowledge
- Data Quality Manager
- Project Manager
- Business Manager

If your organization does not have a large internal support staff, Discovery Data's Managed Services team can help with your MarketLink for Salesforce installation. Please contact us to learn more.

Installation Checklist

MarketLink for Salesforce should first be installed and fully tested in a Salesforce sandbox. This will allow you to test features and monitor for any other third party application conflicts. Once the sandbox is operational and approved, you are ready to begin migrating to production. Installation for both environments will be most effective if the following steps are taken:

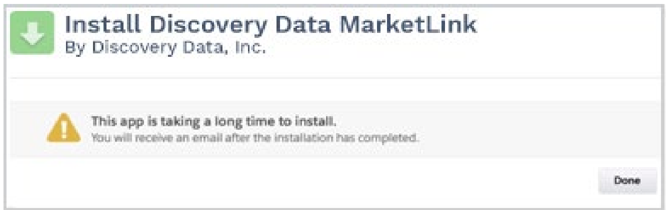
		Sandbox	Production
☐	**Send All Records to Discovery Data for Analysis**		✓
☐	**Assign Resources**	✓	✓
☐	**Confirm Salesforce Version Supports APIs**		✓
☐	**Confirm Salesforce Supported Browsers**	✓	✓
☐	**Review MarketLink for Salesforce Admin Guide**	✓	✓
☐	**Review MarketLink for Salesforce Field Mappings**	✓	✓
☐	**Prepare the Sandbox**	✓	
☐	**Determine Unique IDs**	✓	✓
☐	**Populate Firm CRDs/Branch IDs and Rep CRDs**	✓	✓
☐	**Determine Which Users Need Access to Discovery Data**	✓	✓
☐	**Optional: Create Additional Fields**	✓	✓
☐	**Optional: Manage Duplicates**	✓	✓
☐	**Schedule a MarketLink for Salesforce Sandbox Installation**	✓	
☐	**Install to Sandbox**	✓	

	Sandbox	Production
☐ **Test the Sandbox**	✓	
☐ **Confirm Salesforce Permissions**		✓
☐ **Review Storage Space**		✓
☐ **Review API Usage**		✓
☐ **Back Up Records**		✓
☐ **Take Inventory of Page Layouts**		✓
☐ **Schedule User Training**		✓
☐ **Schedule a MarketLink for Salesforce Production Installation**		✓
☐ **Install to Production**		✓
☐ **Review Production Installation**		✓
☐ **Set Audience Criteria**	✓	✓

Installation Instructions

1. Log into your Salesforce sandbox or production environment.
2. Click the MarketLink for Salesforce URL provided to you by Discovery Data.
3. Select Install for Admins Only and click the Install button. Note: If you have custom System Admin profiles, select Install for Specific Profiles instead and grant Full Access to each System Admin profile.

4. Approve Third-Party Access and click Continue.
5. You may be required to log into Salesforce again to confirm installation.
6. Depending on how long the process takes you may see the following:



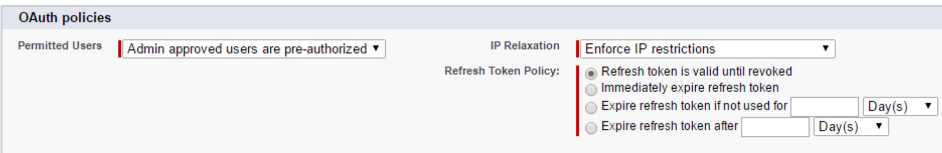
7. Click the Done button. You will then have to wait until Salesforce completes the installation process. When MarketLink for Salesforce has been installed, you will receive an email from support@salesforce.com confirming that the request to install the package was successful.

Clone Permission Set

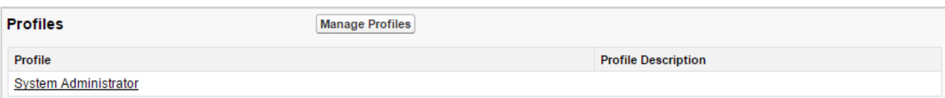
1. Go to Setup > Users > Permission Sets.
2. Select Clone next to the Permission Set Label Discovery Data Standard MarketLink User.
3. Add "Clone" to the end of the current label name.
4. Add "Clone" to the API name.
5. Click Save.

Configure Connected Apps to Allow Salesforce to Access Discovery Data

1. Go to Setup > Apps > Manage Connected Apps > Select Edit next to Discovery Data MarketLink Settings.
2. Under OAuth policies > Permitted Users > Choose Admin approved users are pre-authorized, select OK when the pop-up window appears and click Save.



3. Back at the Connected Apps screen, select the link for Discovery Data MarketLink Settings from the Master Label column to view the Connected App detail page. Review the profiles by selecting the Manage Profiles button and add System Administrator and any other profiles you would like to access MarketLink for Salesforce and select Save.

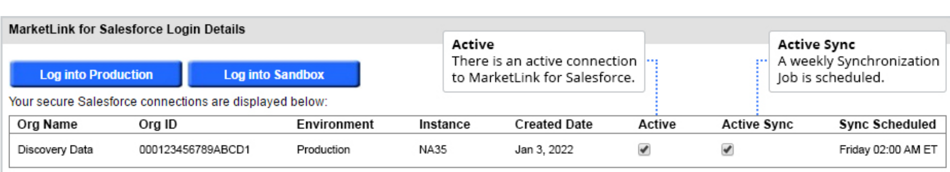


4. Back at the Connected Apps screen, select the link for Discovery Data MarketLink Settings from the Master Label column to view the Connected App detail page. Review the permission sets by selecting the Manage Permission Sets button and add Discovery Data Standard MarketLink User Clone permission set to access MarketLink for Salesforce and select Save.

Connect Salesforce to Discovery Data

Establish a secure connection between Salesforce and Discovery Data.

1. [Log into Discovery Data](#) > My Account > MarketLink for Salesforce Login Details.
2. Select the Log into Production or Log into Sandbox button.
3. If necessary, enter your Salesforce username and password to establish a secure connection. You may already be logged in through single sign-on authentication.



Enable MarketLink for Salesforce Settings

Once you allow access to MarketLink for Salesforce Settings you can set your preferences.

1. Go to Discovery Data MarketLink Mapping.
2. Select the Settings link and click Admin Configuration.
3. Copy the URL that displays.
4. Go to Setup > Security > Remote Site Settings.
5. Select the New Remote Site button.
6. Enter Remote Site Name: DiscoveryDataMarketLinkSettings.
7. Enter Remote Site URL: {Paste the URL}.
8. Select Save.

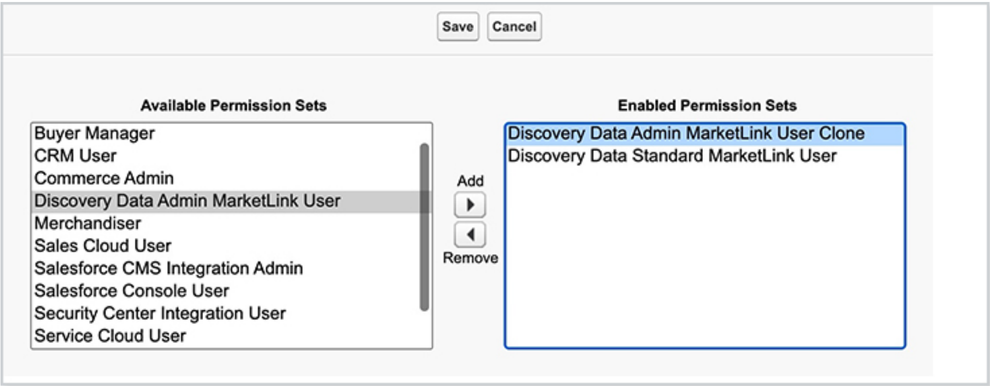
Grant Permission to Admin Users

If access to MarketLink for Salesforce was not granted to an admin user during installation, you can add the permission set Discovery Data Admin MarketLink User at any time.

Grant Permission to Users

If access to MarketLink for Salesforce was not granted to a user during installation, you can add the permission set Discovery Data Standard MarketLink User at any time.

1. Go to Setup > Users > Users > Select a User > Permission Set Assignments > Edit Assignments and move Discovery Data Standard MarketLink User Clone from Available Permission Sets to Enabled Permission Sets.
2. Click Save.



Grant Visibility to Users

If visibility to MarketLink for Salesforce was not granted to a user during installation, you can check and provide visibility to Discovery Data fields at any time.

1. By default, your user Profiles should have API Enabled selected. To confirm, go to Setup > Users > Profiles > Select a Profile > System Permissions.
2. To confirm field level security, go to Setup > Object Manager > {Select Accounts, Contacts or Leads} > Fields > {Field Name} > Set Field Level Security. Check the custom fields listed under the MarketLink for Salesforce Installed Package. Some fields are installed as read-only, which cannot be modified.

Add Fields and Buttons

Quickly add fields to multiple page layouts and list views using the Discovery Data MarketLink Admin Configuration settings or add them using standard Salesforce settings.

1. Go to Discovery Data MarketLink Mapping > Settings > Admin Configuration.
2. Select an object from the drop down menu.
3. Add fields to Page Layouts and List Views.
4. Click Save.
5. Go to standard Salesforce settings to add buttons to Search Layouts.

Enable Middle Name and Name Suffix Fields
If you wish to map Discovery Data middle name and suffix fields to correlating standard Salesforce fields, allow Discovery Data MarketLink Mapping to access these Salesforce fields. If mapping to custom Salesforce fields, this instruction does not apply.

1. Go to Setup > Customize > User Interface > User Interface > Name Settings.
2. Click the checkboxes for Enable Middle Names for Person Names and Enable Name Suffixes for Person Names.
3. Select Save.
4. Then go to Setup > Custom Code > Custom Settings and click on Manage next to
5. Discovery Data MarketLink Settings.
6. Select Manage and click Edit. Click the checkboxes for Enable Middle Names for Person Names and Enable Name Suffixes for Person Names.
7. Select Save.

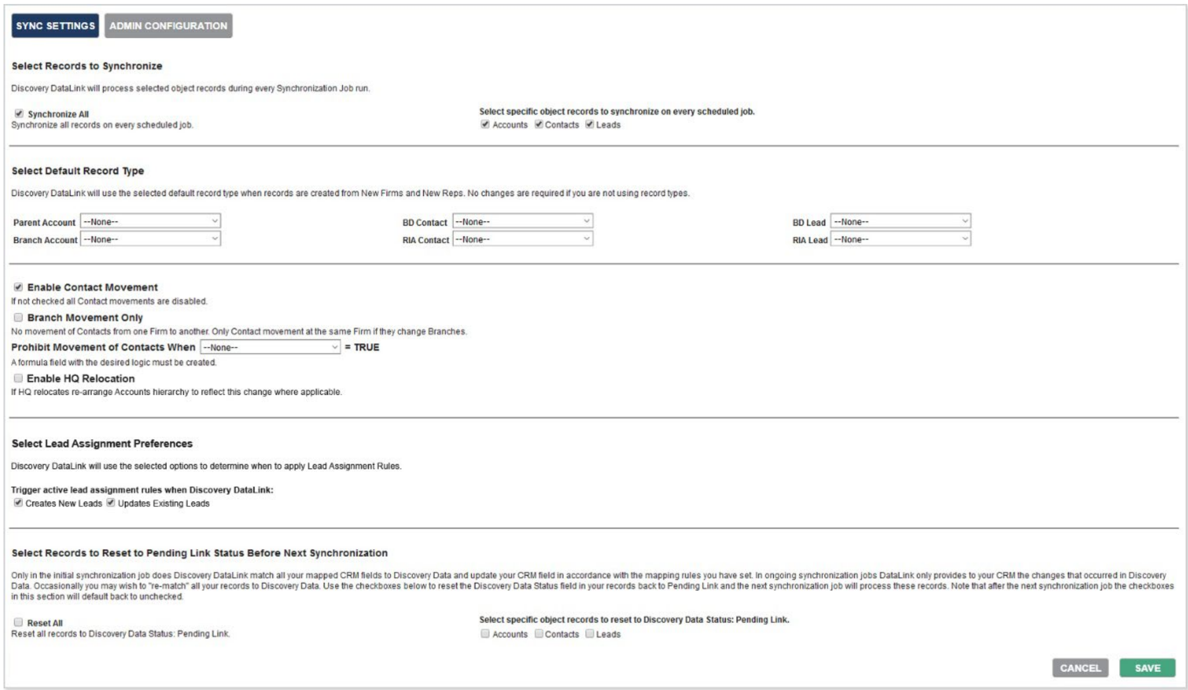
Congratulations! MarketLink for Salesforce is installed.

Configuration

MarketLink for Salesforce Settings

Go to Discovery Data MarketLink Mapping and click the Settings link to manage Sync Settings and Admin Configuration.

Sync Settings



Select Records to Synchronize
By default, MarketLink for Salesforce will synchronize records for Accounts, Contacts and Leads. To customize which objects are processed the next time a Synchronization Job runs, uncheck Synchronize All and use the checkboxes for Accounts, Contacts and Leads to select the objects you want to ignore.

Select Default Record Type
When adding records using New Firms and New Reps, the selected record type will be used when creating new Accounts, Contacts and Leads. Using record types allows you to separate records into groups. When None is selected MarketLink for Salesforce will use the Salesforce default record type for that object.

Note, if you have separate BD and RIA record types the following will apply:

- If a New Rep originates from the RIA Rep search screen, then that rep defaults to the RIA Contact or RIA Lead record type (no matter if the rep is dually-registered or RIA-only).
- If a New Rep originates from the BD Rep search screen, then that rep defaults to the BD Contact or BD Lead record type (no matter if the rep is dually-registered or BD-only).
- If a New Rep originates from both the RIA Rep and BD Rep search screens, then that rep defaults to the BD Contact or BD Lead record type (the rep is dually-registered).

TIP: Discovery Data will work closely with you to create Audience Criteria. Use Primary Firm CRD and comprehensive filtering on Audience Criteria to help eliminate the possibility of duplicate records.

Contact Movement

By default, MarketLink for Salesforce will move a Contact from its current Account association to an Account that matches the new firm association or new branch. Unchecking Enable Contact Movement will result in MarketLink for Salesforce not moving the Contact and instead changing its Discovery Data Status to Inactive. With the latter approach the only way the rep will become a Contact associated with the new Account is if the rep meets your Audience Criteria and comes in as a New Rep. In this scenario you will have the rep duplicated in Salesforce: an inactive Contact related to the Account of the prior firm and a newly created Contact related to the Account of the firm with which the rep is now associated.

You have the option to customize what type of Contact movement takes place using the Branch Movement Only, Prohibit Movement of Contacts and Enable HQ Relocation settings. If you select Branch Movement Only movement of Contacts from one firm to another is disabled. Only Contact movement at the same firm if they change branches is enabled. If you make a selection from the Prohibit Movement of Contacts drop down menu movement of Contacts is disabled based on the selected field equal to TRUE. Otherwise, Contact movement is enabled. If you select Enable HQ Relocation your parent and branch Accounts will automatically re-arrange when there is a headquarters location update.

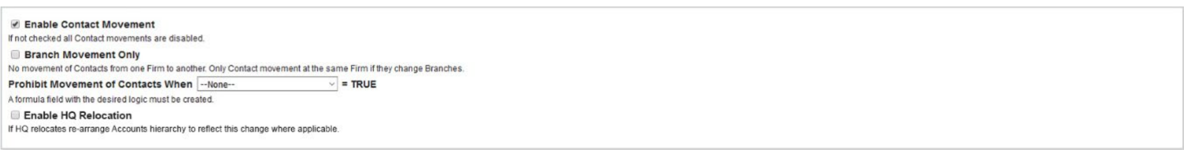
Keep in mind:

- If Enable Contact Movement is selected, the Contact will be moved to the Account with which the rep is now associated and all of the mapped data fields will be updated. It is important to note that if the Account does not have a CRD/ID or it is incorrect, a duplicate Account will be created.
- If a duplicate Account exists, the Contact will be moved to the Account with the most recent Last Activity Date.
- If you want to enable Branch Movement Only, Enable Contact Movement must be selected.
- If a Contact moves from one Account to another, the Contact Owner does not change unless your organization has rules in place to change the owner. This may give an unauthorized user visibility to the Contact. Run reports to track Contact movement and ensure that Contact Owners are updated appropriately.
- Enable Contact Movement only applies to Contacts and Accounts, not Leads. If a Lead changes firms they will be updated based on the Discovery Data MarketLink Mapping.
- If the firm a rep moves to does not already have an existing Salesforce Account, a new Account will be created as long as the new firm and the updated rep meet your Audience Criteria. The Contact is then moved to the newly created Account.*
- If a rep moves from their current branch to a different branch at the same firm and an Account for the succeeding branch doesn't exist in Salesforce, a new branch Account will be created automatically (regardless of Audience Criteria) and the Contact will be moved to be associated with the newly created branch Account.
- If a rep moves to a firm for which an Account does not already exist in Salesforce, a new parent Account (and new branch Account if applicable) will be created as long as the succeeding firm and the updated rep meet your Audience Criteria. The Contact will then be moved to the newly created Account.*
- If a rep moves to a firm for which a parent Account already exists in Salesforce, but the rep is in a branch for which a branch Account does not exist in Salesforce, a new branch Account will be created and associated with the parent Account as long as the succeeding firm and the updated rep meet your Audience Criteria. The Contact will then be moved to the newly created branch Account.*
- If a rep moves to a firm for which neither a parent Account nor a branch Account for the rep's new branch exist in Salesforce, a new parent Account and a new branch Account will be created as long the succeeding firm and the updated rep meet your Audience Criteria. The Contact will then be moved to the newly created branch Account and the branch will be associated to the newly created parent Account.*
- The auto-creation of Accounts using Audience Criteria ignores past rejections of firms in the New Records view in Salesforce.

- If a rep with one Contact currently in Salesforce moves to two different firms at once, and only one of the two firms meets your Audience Criteria, the Contact will move to the Account of the firm that meets your Audience Criteria.
- If a rep with one Contact currently in Salesforce moves to two different firms at once, and both firms meet your Audience Criteria, the Account to which the Contact is moved will be selected at random.
- MarketLink for Salesforce only handles movement of reps when they move from one RIA firm to another RIA firm or from one BD firm to another BD firm. Cross-channel movement is not currently supported.

***NOTE:** If the succeeding firm and updated rep do not meet your Audience Criteria, the Contact is marked with a Discovery Data Status of Inactive and remains with the Account with which it has been associated.

To change your settings, go to Discovery Data MarketLink Mapping > Settings > Sync Settings > Enable Contact Movement.



Select Lead Assignment Preferences

By default, MarketLink for Salesforce will utilize active Lead Assignment Rules when it creates new or updates existing Leads. To modify these settings use the two checkboxes provided: Create New Leads and Updates Existing Leads. Create New Leads encompasses any new Leads added from View New Records. Updates Existing Records includes Leads updated using the Discovery Data Search button and via Synchronization Jobs or accepting or rejecting updates for Leads with the Update Available status.

Select Records to Reset to Pending Link Status Before Next Synchronization

Only in the initial Synchronization Job does MarketLink for Salesforce match all of your mapped CRM fields to Discovery Data and update your fields based on the mapping rules you have set. In ongoing Synchronization Jobs MarketLink for Salesforce only provides the changes that occurred in Discovery Data. Occasionally you may wish to re-sync all or certain records to Discovery Data. Use the checkboxes provided to reset records to the Discovery Data Status Pending Link and process them in the next Synchronization Job. This is useful, for instance, when you have added fields to Discovery Data MarketLink Mapping and want all records to have the newly mapped fields populated.

TIP: After each Synchronization Job all checkboxes are reset to their default (unchecked) status.

Admin Configuration

Select Object
Select the Salesforce object you want to update.

Assign Page Layouts
Select which buttons and fields should be added to each page layout.

TIP: If you have many page layouts and not all appear in the list, you will have to edit each page layout using standard Salesforce settings.

Assign List Views
Select the fields you want to display on list views.

Assign Search Layouts List View Buttons
Follow the instructions to add the Accept and Reject buttons on list views.

Account Hierarchy (**IMPORTANT**)

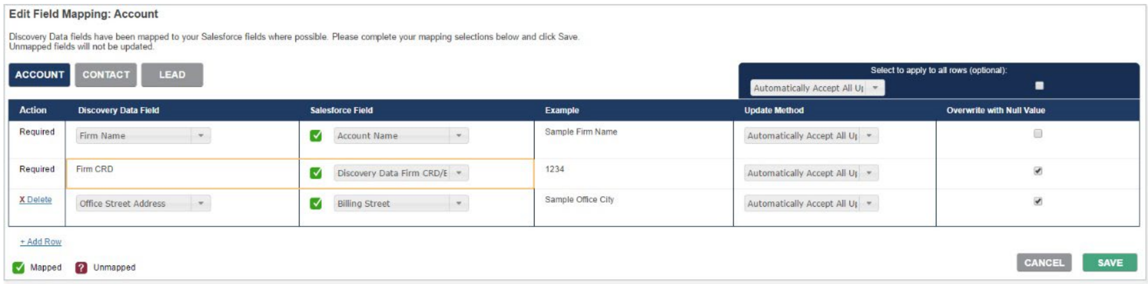
One of the most powerful components of MarketLink for Salesforce is the ability to select which unique ID will be used to synchronize Accounts and Leads with Discovery Data. You will be able to select your unique ID one time at initial setup. All subsequent changes will require support from Discovery Data.

Firm CRD – Selecting this field in the Discovery Data Field column indicates that you have a Parent Account/Contact hierarchy within Salesforce. CRD stands for Central Registration Depository and is a unique, official financial services industry regulatory ID never recycled. This makes it the ideal key to map to the Salesforce ID for your records.

Branch ID – Selecting this field in the Discovery Data Field column indicates that you have a Parent Account/Branch Account/Contact hierarchy within Salesforce. There are two Branch ID options available:

- **Discovery Physical Branch ID**: This Discovery Data field allows firms to be identified uniquely by their Firm CRD and their physical building location. This is typically the approach selected as it avoids having multiple Branch Accounts for the same firm in the same building.
- **Discovery Branch ID**: This Discovery Data field allows firms to be identified uniquely by their Firm CRD and their distinct address 1 and address 2 location. Use this ID if you wish to separate unique suites and floors for a single firm. Note, this may result in the same location having two Branch Accounts due to different filing approaches, such as Floor 1 and Suite 100.

IMPORTANT: Our recommendation is to utilize the Discovery Physical Branch ID for any client in the Branch Structure as long as there is no specific need for unique Branches to be based on the Address 2 field.



Synchronization Job

Once you have set up your Discovery Data MarketLink Mapping you are ready to schedule a Synchronization Job to start receiving Discovery Data updates in Salesforce. To schedule a Synchronization Job, contact Discovery Data so we can select a convenient day and time outside of business hours together. With many factors to consider, such as already existing API connections, we will help you determine a schedule with the least impact on your organization, and more importantly, your users. Sandbox jobs will be set on a one-off basis and production jobs must be reoccurring weekly.

IMPORTANT: You cannot make edits to Discovery Data MarketLink Mapping or access any of the features available through the View New Records button while a job is running.

Optional: Salesforce Application Custom Settings

If needed you can update custom application settings for specific purposes. Please work with Discovery Data to safely adjust these settings as there may be performance implications. To find these custom settings, go to Setup > Custom Code > Custom Settings > Discovery Data MarketLink Settings > Manage > Edit

- Data Sync Process Running – Used by the Update Process. An update process set to TRUE does not allow more than one update process while the updated process is running.
- Enable Middle Names for Person Names – Indicates if Middle Name field is turned on or off.

Features

Discovery Data MarketLink Mapping

To map Discovery Data fields to Salesforce Account, Contact and Lead fields, navigate to Discovery Data MarketLink Mapping.

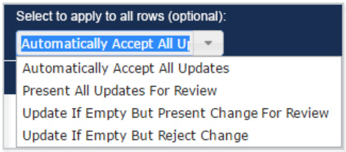
MarketLink for Salesforce installs a default set of fields listed on Discovery Data MarketLink Mapping to give you a head start and provide recommendations. We have auto-mapped many of these fields to standard Salesforce fields; however, these can be changed at any time to map to different Salesforce fields or to not map certain fields at all. If a standard Salesforce field does not exist that we believe would be a good fit for these default fields, we present the Discovery Data field unmapped. You will need to create a custom field or select an existing field to map this field to or you can remove it. It is recommended that you work with Discovery Data to determine what fields should be mapped and prior to setting the mapping create Salesforce fields that correspond with the available Discovery Data fields you plan to map.

To review and update your mapping:

- Go to Discovery Data MarketLink Mapping.
- Select Account, Contact or Lead and then click the Edit button.
- Complete the required fields first. By selecting **Firm CRD** you are telling the app to use a Parent Account/Contact hierarchy. If you use a Parent Account/Branch Account/Contact hierarchy instead, select one of the two **Branch ID options: Discovery Physical Branch ID or Discovery Branch ID**. You will be able to select your Account and Lead unique ID one time at initial setup. All subsequent changes will require support from Discovery Data.
- Continue to verify, revise, or remove the default fields.
- Add rows to map additional fields.
- Select or change your Update Method for each field.
- Where applicable select the **Overwrite with Null Value** checkbox. This allows a null value from Discovery Data to overwrite a Salesforce value.
- Save your mapping.

IMPORTANT: Changes to Discovery Data MarketLink Mapping cannot be made while the Synchronization Job is running. If you make updates to your mapping, they will be used the next time the job runs.

There are four update methods available for mapping Discovery Data fields to Salesforce fields: Automatically Accept All Updates, Present All Updates For Review, Update If Empty But Present Change For Review and Update If Empty But Reject Change. These can be set on a per field basis or applied to all fields using the Select to apply to all rows (optional): drop down menu.



- **Automatically Accept All Updates** – When a Discovery Data field is mapped to a Salesforce field and the option Automatically Accept All Updates is selected, data in the mapped Salesforce fields will be overwritten by Discovery Data's changes. For example, a Contact in Salesforce has the field Middle Name, which is Jane. When the Synchronization Job runs and information is received, if Discovery Data has the matching Contact's middle name as Joan, the Salesforce field will update to Joan with no action needed by the user or you. This is, of course, the ideal approach, but should only be used where you are highly confident that Discovery Data will not be overwriting data your users do not want to lose. If, instead, the Contact's middle name was empty in Salesforce, we would insert Joan for you.
- **Present All Updates For Review** – When selecting Present All Updates For Review users must manually review and accept or reject changes to the Salesforce record they own. Custom views called Discovery Data Updates have been installed on Accounts, Contacts and Leads where the information from Discovery Data that differs from the data in Salesforce can be reviewed and accepted or rejected.
- **Update If Empty But Present Change For Review** – When selecting this approach only fields in Salesforce that are null will be updated automatically when the Synchronization Job runs. No data will be overwritten, but empty fields will be populated with Discovery Data updates. Those fields with data already in Salesforce will require manual review, as described in Present All Updates For Review.
- **Update If Empty But Reject Change** – When selecting this approach only fields in Salesforce that are null will be updated automatically when the Synchronization Job runs. No data will be overwritten, but empty fields will be populated with Discovery Data updates. Proposed changes to those fields with data already in Salesforce will be rejected; therefore, not updated by Discovery Data.

If the data types of the Discovery Data field and the Salesforce field are not in sync with each other, an **error** or **warning** message may appear on Discovery Data MarketLink Mapping. Examples are below.

Warning: Truncation is possible.
The field size for "Last Name"(100)
is more than "Last Name"(80).

Error: Salesforce field for mapping
is not selected.

Discovery Data MarketLink Mapping can be saved if a warning message is displayed. However, error messages will appear when the data type of the Salesforce field is such that the Discovery Data field cannot be mapped and saved. For example, the data type of the Salesforce field is Phone and the Discovery Data field mapped to it is Firm Website. The data type URL cannot be saved to a Phone field until the error is corrected. An error will also result if a Salesforce field has multiple Discovery Data fields mapping to it, although a single Discovery Data field may be mapped to several different Salesforce fields.

IMPORTANT: Discovery Data MarketLink Mapping must be set for Accounts, Contacts and Leads in order for the Synchronization Job to run successfully. If your organization does not use Lead Management, you will need to set your Lead mapping to only include the fields Rep CRD, Last Name, Firm CRD and Firm Name. All should be set to use Update If Empty But Present Change For Review.

Once you have set your Discovery Data MarketLink Mapping and the first Synchronization Job runs, MarketLink for Salesforce will determine which Salesforce records match to Discovery Data records using CRDs or Branch IDs. For any records that match, we will do a complete comparison of your Salesforce data to Discovery Data values for all mapped fields and send over any updates according to your mapping update method. Moving forward, each time the Synchronization Job runs, we will send any changes in Discovery Data for matched records based on your current mapping and will look to match any additional records that have newly populated or updated.

Discovery Data MarketLink Mapping Tips and Best Practices

MAPPING METHODOLOGY
Only one mapping for Accounts, Contacts and Leads can be saved per Salesforce organization. Discovery Data fields can be mapped to multiple Salesforce fields. Discovery Data fields cannot be mapped to custom objects.

UPDATE DATA AUTOMATICALLY WHENEVER POSSIBLE
Due to the large amount of updates that will flow from Discovery Data to Salesforce, we recommend that the setting Automatically Accept All Updates is used for mapping most fields. This will ensure your users are seeing the most up-to-date data and not spending too much time reviewing and accepting updates.

CONSIDER MAPPING RECOMMENDATIONS PROVIDED BY DISCOVERY DATA
For your convenience, Discovery Data lists a default set of fields to map. While more fields may be added, most of our clients include these default fields in the final mapping configuration at minimum.

DO NOT AUTOMATICALLY UPDATE CERTAIN FIELDS
If your organization has data that shouldn't be modified by Discovery Data, we suggest presenting changes to these fields for manual review by users. Separately, creating a custom field to automatically map to Discovery Data fields is helpful, as it makes the most up-to-date data immediately available. For example, you likely will not want to automatically overwrite the standard Salesforce Phone field because your users may have collected a better phone number than is provided by Discovery Data. In this example, our recommendation is that you set the standard Salesforce Phone field update method to Update If Empty But Present Change For Review. Separately, you can create a custom Phone field to map to Discovery Data, which can use the update method Automatically Accept All Updates.

CAREFULLY REMOVE MAPPED FIELDS AND CHANGE UPDATE METHODS
Before you delete a field mapping, make sure all pending updates are accepted or rejected for that field or you could potentially end up with Update Available statuses with no data to review. Additionally, before changing the update method of a field make sure your users have accepted or rejected all pending updates or you will lose them after the next Synchronization Job runs.

CAREFULLY CHANGE DATA TYPES
If you need to change the data type for a mapped Salesforce field, contact Discovery Data ahead of time. Changing a data type can result in lost data. We can provide a data feed so you can upload the data back.

SET FIELD HISTORY TRACKING
To enable your users to see and reverse changes made to your organization's data, we strongly recommend that you set up field history tracking.

CREATE EMAIL ALERTS TO MONITOR CHANGES
To be immediately alerted if there has been a change made by Discovery Data to a sensitive field, set up a workflow rule using an email alert to notify anyone in your organization that may be interested in knowing about the change.

Discovery Data Updates

Adding the Discovery Data Status and Discovery Data Parent Status fields to page layouts will let your users quickly see the status of Accounts, Contacts and Leads and alert them if there is an action that needs to be taken or if key data is missing from a record. This field may be updated if there is a change in Salesforce or Discovery Data each time your Synchronization Job runs or the Update Record button is selected using Discovery Data Search.

The **Discovery Data Status** field will contain one of the following statuses:

Linked – This record is populated with the required CRD/ID field(s) and successfully matched to a firm or rep in Discovery Data. The data for the Salesforce record is the same as Discovery Data.

Pending Link – The required CRD/ID field(s) are populated, but the Synchronization Job has not run since adding or updating the CRD/ID field(s) to attempt a match to Discovery Data.

Updated – An update from Discovery Data has been applied to this record. This occurs through fields updated automatically and by a user accepting or rejecting data that has been presented for manual review.

Update Available – There are pending updates for this record that require manual review (accept or reject). When a record has this Discovery Data Status, it is a link that takes the user to a side-by-side comparison of Discovery Data and Salesforce data.

Inactive – This status indicates that a Salesforce record previously linked to MarketLink for Salesforce is no longer linked. For firms this always means the firm is no longer active in the industry. For reps the reason for Inactive status depends on your Salesforce settings. If you have Enable Contact Movement turned on, allowing movement of Contacts and Leads, then in nearly all cases when the record's status is Inactive that means the rep is no longer active in the industry. If you do not allow movement of Contacts and Leads within Salesforce, a Contact related to an Account of a firm the rep was previously associated with will have the status of Inactive when the rep is no longer associated with that firm. This does not mean the rep is no longer active in the industry.

Not Found – This record is populated with at least one required CRD/ID field, but the Firm CRD/ID or Firm CRD/ID and Rep CRD combination was not found in Discovery Data. This mostly occurs when a Rep CRD is present, but a Firm CRD/ID is empty or if one of the CRDs/IDs is not accurate.

No ID – This record is missing the required CRD/ID field(s).

Note, a similarly named field, **Discovery Data Report Status**, has also been provided. This field is the same value as the Discovery Data Status field, but it allows you to summarize reports by their status. It is recommended that this field is only used for reporting purposes, including summarizing and exporting, and is not made visible to most users.

If you are using a Parent Account/Branch Account/Contact hierarchy, Accounts will also have the **Discovery Data Parent Status** field, which will contain one of the following statuses:

- **Linked** – The correct Parent Account is linked to the Branch Account.
- **No Parent** – There is no Parent Account linked to the Branch Account.
- **Wrong Parent** – This Branch Account is not linked to the proper Parent Account.

Contacts will have a similar field labeled **Discovery Data Parent/Branch Status**, which will contain one of the following statuses:

- **Linked** – The correct Account is linked to the Contact.
- **Not Linked** – The Account for this Contact is not linked to Discovery Data.
- **Wrong Account** – This Contact is not linked to the proper Account.

The **# of Discovery Data Updates** field will show how many times an Account, Contact or Lead has been updated by Discovery Data. This value will only change when data has been applied from Discovery Data to a record from either the Synchronization Job or the Update Record button in Discovery Data Search. Rejecting updates will not change this field.

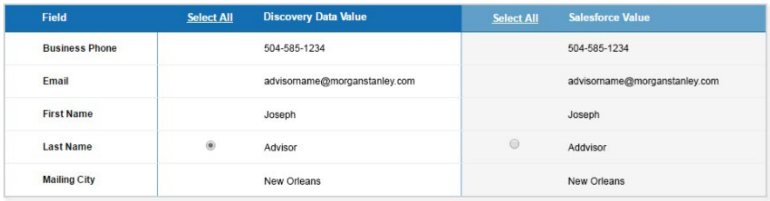
IMPORTANT: Note, while Discovery Data is the most extensive source for information on the industry, there are data limitations that may cause, in very limited cases, an active rep to not be included in Discovery Data. Users should not make assumptions about a rep solely based on the Discovery Data Status field.

Accepting/Rejecting Available Updates

Users can accept or reject the updates available from Discovery Data for those fields that have the mapping set to Present All Updates For Review or Update If Empty But Present Change For Review if data exists in the field. The update available is presented on the Account, Contact and Lead list view Discovery Data Updates and on a record detail.

From a list view:

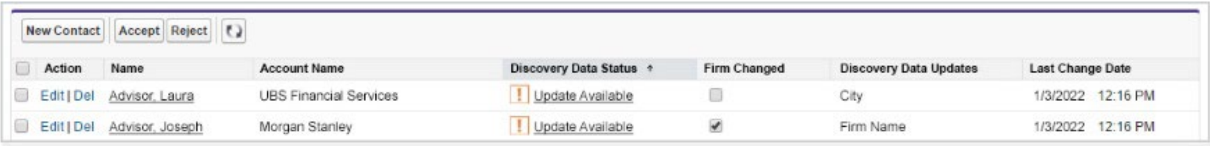
- Go to the Accounts tab.
- Select Discovery Data Updates from the view drop down menu then Go.
- Click the Update Available link in the Discovery Data Status column.
- Select the radio buttons next to the data you want to save on the record.
- Note, to only show values that differ, use the Hide Identical Values checkbox.
- Press Save and the page will then redirect you to the record.
- Repeat these steps for Contacts and Leads with updates available.



Field	Select All	Discovery Data Value	Select All	Salesforce Value
Business Phone		504-585-1234		504-585-1234
Email		advisorname@morganstanley.com		advisorname@morganstanley.com
First Name		Joseph		Joseph
Last Name		Advisor		Addvisor
Mailing City		New Orleans		New Orleans

To update multiple records at once:

- Go to the Accounts tab.
- Select Discovery Data Updates from the view drop down menu then Go.
- Sort by the **Firm Changed** checkbox to see records that may have common fields being updated due to a firm change.
- Review the **Discovery Data Updates** field to quickly see fields that have pending updates.
- Use the **Last Change Date** to see when Discovery Data last sent an update for that record to Salesforce.
- Select the checkbox to the left of each record you want to update.
- Click the **Accept** or **Reject** buttons to process Discovery Data's proposed updates.
- Repeat these steps for Contacts and Leads with updates available.



New Contact | Accept | Reject

Action	Name	Account Name	Discovery Data Status	Firm Changed	Discovery Data Updates	Last Change Date
Edit | Del	Advisor, Laura	UBS Financial Services	Update Available		City	1/3/2022 12:16 PM
Edit | Del	Advisor, Joseph	Morgan Stanley	Update Available	✓	Firm Name	1/3/2022 12:16 PM

Discovery Data Update Tips & Best Practices

COUNTING UPDATES
If updates are applied via a combination of automatically, manual review and/or only if empty in a single Synchronization Job, it will count as one update. If updates have been applied to a Lead and the Lead is then converted to a Contact, the # of Discovery Data Updates field will carry over the number of updates applied when the Contact was a Lead and continue to increase as updates are applied to the Contact. If a new Account is also created during the Lead conversion process, the # of Discovery Data Updates field for the Account will be zero initially and will begin to update when the next Synchronization Job is run and a successful link has been found. To fully populate a new Account quicker, we recommend using the Discovery Data Search button.

CREATE EMAIL ALERTS TO NOTIFY USERS
Workflow rules using email alerts can be created to notify your users when an update is available.

CREATE INDIVIDUAL VIEWS
It is recommended that you create individual views for each user so they can quickly review their pending updates. These views can be restricted if needed to only the entitled person.

CHECK VALIDATION RULES
As a Salesforce Administrator, you should be aware of any validation rules or security settings that you have in place that may prevent your users from updating data. These restrictions should be reviewed prior to the installation of MarketLink for Salesforce.

PREVENT USER ERROR
It is important to communicate to your users that the Accept and Reject buttons can be available on multiple views, not just Discovery Data Updates. If your users select records and click either of these buttons on any view besides Discovery Data Updates, they will receive a message instructing them to 'Select a record', which will not make changes to any records.

TRACK MASS ACCEPTS
If you or your users are accepting or rejecting updated values via the view often, it may be a sign that the mapping for your fields needs to be revisited because you are ready to consider accepting updates automatically.

SET FIELD HISTORY TRACKING
Accepting the changes from Discovery Data will overwrite your existing Salesforce data. If field history tracking is not enabled, the prior value in the updated field is not retrievable.

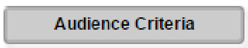
CHECK LEAD ASSIGNMENT SETTINGS
To have active Lead Assignment Rules followed when existing Leads are updated (accepted or rejected) go to MarketLink for Salesforce Sync Settings and verify the checkbox Updates Existing Leads is selected.

New Firms and New Reps

Create Audience Criteria

Define your organization's Audience Criteria in MarketLink for Salesforce so that each week firms and reps that are in your target market can be added to Salesforce.

IMPORTANT: It is highly advised that you don't make Audience Criteria changes without having Discovery Data assist you to help ensure you will only receive records that meet your target market.



- Go to Discovery Data MarketLink Mapping.
- Click the View New Records button, then click New Firms or New Reps.
- Navigate to the Audience Criteria button.
- Go to the BD and RIA search screens and select your filters. Skip the search screens that do not apply to your business.
- Click Save. You will be presented with a pop-up window with the following options: 1) Replace existing pending records with the results from the updated Audience Criteria or 2) Include in audience previously rejected records if it meets the updated Audience Criteria.
- Select an option and then click OK or Cancel.

By clicking Save you have set the Audience Criteria for your organization and a Synchronization Job will run to deliver your results. All firms and reps that meet your criteria and do not already exist as linked records within your CRM will be listed in New Firms and New Reps for you to review and add or reject. New Firms and New Reps will update each time you change and save your Audience Criteria or when your weekly Synchronization Job runs and new firms and reps meet your Audience Criteria.

Audience Criteria Tips and Best Practices

WORK TOGETHER

Audience Criteria is an organization-wide setting. If your company has multiple Salesforce Administrators in one instance, you need to work closely together along with Discovery Data to determine the correct filters for your target market and ensure that all applicable firms and reps are being sent for review.

ADDING NEW REPS AS CONTACTS MAY CREATE NEW ACCOUNTS

When new reps are added from Discovery Data, associated new firms will be added as well if they do not already exist in Salesforce. By accepting New Reps as Contacts, you may also be creating new Accounts if we have not determined there is an existing Account with the correct Firm CRD/Branch ID. This may result in duplicates. To help prevent this from happening, make sure your CRM system is fully populated with CRD/ID field(s) and review New Firms before going to New Reps to add new Contacts.

SAVE!

To set your criteria, you must press Save for each search screen from which you want new records. You must have at least one filter in order to save the criteria. Clicking the Save button is what activates your Audience Criteria. If you mistakenly press Save or no longer want to receive new firms or reps from all or certain tabs, type None in the Copy & Paste pop-up window for City and press OK.

DEFAULT LOCAL ADDRESS

If your Audience Criteria includes geographical restrictions, keep the default selection Local Address on RIA Reps.

PREVENT AUDIENCE DISCREPANCIES

You are able to set completely different criteria for each of the four search screens since the filters work independently, but be careful. Between both BD and both RIA search screens you should use common filters such as firm type to prevent audience discrepancies. For instance, if you have set your criteria to be wirehouse on BD Firms, the same filter should be used on BD Reps or you will not get the associated reps.

UPDATING AUDIENCE CRITERIA

If your target market changes, (for example, if you have a new selling agreement) and that change will result in a significant amount of new firms and reps in your target market, contact Discovery Data before updating your Audience Criteria. It may be best to import a file of these new records. Discovery Data can then work with you to update your Audience Criteria so that any firms or reps that change to fit your criteria moving forward are being sent for review.

FILTER BY FIRM CRD

To include or exclude specific firms, use the Firm CRD filter. An OR command should be between each Firm CRD in the criteria if you want to include multiple firms. An AND command should be between each Firm CRD in the criteria if you want to exclude multiple firms. This criteria functionality is one tool for which you will be best served to engage Discovery Data for initial creation of your target market.

CHECK THE COUNT

Each Audience Criteria search screen includes a count of all records that meet your criteria that are not already linked in Salesforce to Discovery Data. This count will increase or decrease as you add and remove filters.

SEARCH BY PRIMARY FIRM CRD

On the BD Reps and RIA Reps search screens you have the option to search by Primary Firm CRD or All Firm CRDs. By default Primary Firm CRD is selected to help prevent duplicate records in Salesforce. If you switch the radio button to All Firm CRDs your Audience Criteria will include multiple records for the same rep if the rep is associated with multiple firms.

Add or Reject New Firms and New Reps

Each week new firms and reps are added to Discovery Data. Any new firms or reps that meet your Audience Criteria that have been added to Discovery Data since the last Synchronization Job will be presented to you for review on New Firms and New Reps. You can add them as new Accounts, Contacts or Leads or opt to reject them.

Discovery Data determines if the Firm CRD/Branch ID and/or Rep CRD already exists within Salesforce and will not send any definitive matches for review to help prevent adding duplicate records. If a rep's firm does not exist already in Salesforce with the correct CRD/ID a new firm will be created and the rep will be associated properly. If a rep or firm exists in Salesforce but does not have a CRD/ID, then there is a risk that MarketLink for Salesforce will create a duplicate record.

To add New Firms and New Reps:

- Click the View New Records button on Discovery Data MarketLink Mapping.
- Select New Firms or New Reps.
- Once you have reviewed the records available, use the checkboxes to the left and buttons at the top to add or reject them.

To download pending new or rejected firms or reps, click the Download icon next to the search box. All firms or reps will be provided in a CSV file.

Below are the buttons you can use to add or reject new firms:

- **Add as New Account** – By selecting this option, the New Firm will be created as an Account in Salesforce with data from Discovery Data.
- **Add as New Account with New Contacts** – This will add the New Firm as a new Account and also create New Reps as Contacts.
- **Add All Accounts** – This will add all of the New Firms as new Accounts.
- **Add All Accounts with New Contacts** – This will add all of the New Firms as new Accounts and add all of the associated New Reps as Contacts.
- **Reject New Firm** – This New Firm will be moved to Rejected Firms.
- **Reject New Firm with New Reps** – This New Firm and any associated New Reps will be moved to Rejected Firms and Rejected Reps.

Below are the buttons you can use to add or reject new reps:

- **Add as New Contact** – By selecting this option, the New Rep will be created as a Contact in Salesforce with the data from Discovery Data. The Contact will be associated to an existing Account if the correct firm is in Salesforce and linked through the app, but if not, a new Account will be created.
- **Add as New Lead** – This will add the New Rep as a Lead.
- **Add All New Contacts** – This will add all of the New Reps as Contacts. These Contacts will be associated to existing Accounts if the correct firms are in Salesforce and linked through the app, but if not, new Accounts will be created.
- **Add All New Leads** – This will add all of the New Reps as Leads.
- **Reject New Rep** – This New Rep will be moved to Rejected Reps.
- **Reject All New Reps** – All New Reps will be moved to Rejected Reps.

New firms and reps will be populated based on the Discovery Data MarketLink Mapping set for your organization.

New Firms and New Reps Tips and Best Practices

CONSIDER THESE POSSIBLE LIMITATIONS
When adding new firms and reps, you should be aware of existing validation rules that might prevent creation of a new Account, Contact or Lead. Similarly, you should be mindful of any workflow rules that may trigger when an Account, Contact or Lead is created.

DUPLICATION POSSIBLE
MarketLink for Salesforce does not prevent duplicate Accounts, Contacts or Leads from being created. If this is a concern for your organization, Discovery Data recommends working with a de-duping tool, many of which can be found on the Salesforce AppExchange.

BE AWARE OF YOUR DATA STORAGE LIMITATIONS
Adding new records can also have an impact on your Salesforce data storage. When adding a large number of new records, it is recommended that you check the data storage available in your organization.

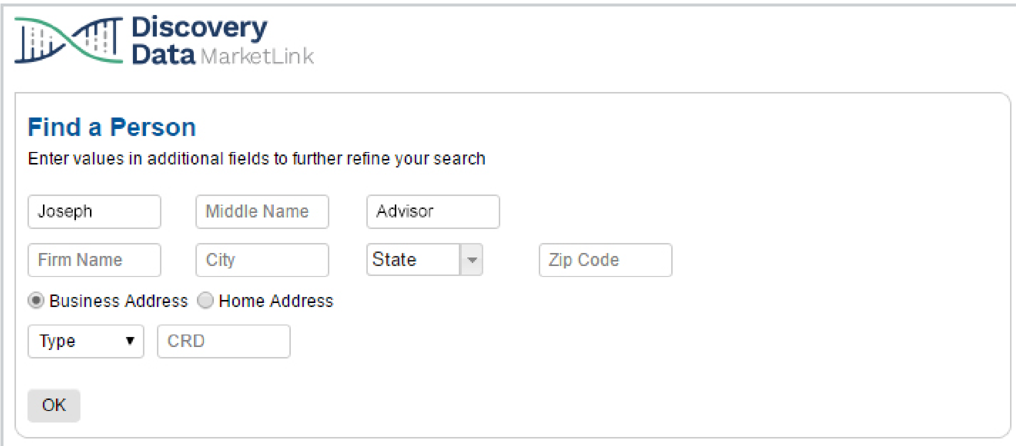
FULLY POPULATED RECORDS
New Reps can be created as a Contact or Lead and will be populated based on the specific mapping for that object.

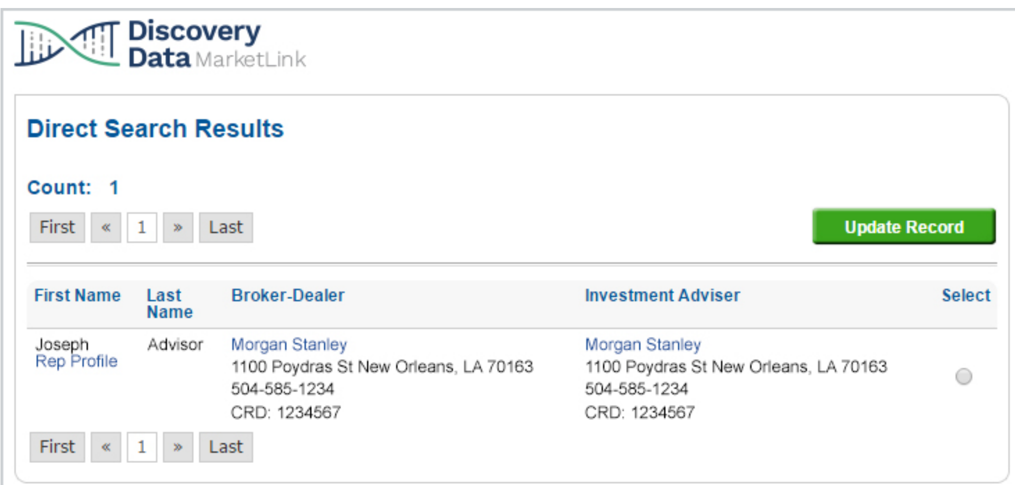
MAP DATA FROM LEADS TO CONTACTS
If adding New Reps to Salesforce as Leads, make sure your Lead fields are mapped to Contact fields so no data loss occurs during conversion.

CHECK LEAD ASSIGNMENT SETTINGS
To have active Lead Assignment Rules followed when new records are added as Leads go to MarketLink for Salesforce Sync Settings and verify the checkbox Create New Leads is selected.

Discovery Data Search

Users can search Discovery Data right from Salesforce using the Discovery Data Search button to update existing records and quickly populate new records on demand using the powerful Update Record option.





Update Existing Records and Populate New Records

Salesforce users who also have a Discovery Data user seat can populate Accounts, Contacts and Leads with missing or incomplete information. The below steps can also be used when creating new records, allowing users to manually enter only the minimum required information and populate all mapped fields available with just a few clicks.

- Select the Discovery Data Search button on Accounts, Contacts or Leads.

This button takes the user directly to a Discovery Data search screen through single sign-on authentication.

- Review or update the pre-populated information and search filters.
- Click OK.
- On the Direct Search Results page, select the radio button for the record that matches the one you want to update in Salesforce.
- Select the Update Record button.

- A confirmation message will display letting you know that the CRD/ID field(s) have been applied to the Salesforce record.
- Click OK.
- The Salesforce record will refresh (this may take a moment) and now be populated with values from Discovery Data based on the mapping set.
- If fields have been set for manual review, you will need to accept or reject these updates.

Discovery Data Search Tips and Best Practices

EDUCATE USERS ON SCENARIOS
Discovery Data has extensive logic behind the Update Record button. While every effort will be made to help guide users in the right direction, users could potentially apply the wrong CRD/ID to a record or create duplicate records. This is something you should be aware of and monitor.

ELIMINATE THE NEED FOR VALIDATION RULES AND REQUIRED FIELDS
Encourage your users to populate new records utilizing this feature to eliminate data entry errors as well as ensuring that your records have all necessary fields populated.

EVALUATE YOUR MAPPING
Users who populate Accounts, Contacts and Leads via this feature should quickly see an improvement in data quality and the completeness of records. If your organization is still missing key data fields it may be a sign to revisit your Discovery Data MarketLink Mapping to add additional fields.

AUTOMATICALLY UPDATE
The more fields that are set to Automatically Accept All Updates, the less action your users have to take when using Discovery Data Search. If many fields are set to Present All Updates For Review or Update If Empty But Present Change For Review, your users may soon be overwhelmed with the amount of updates they have to review and hesitant to continue using this feature.

CREATE A DISCOVERY DATA SECTION ON YOUR PAGE LAYOUTS
If your users are sensitive to having their data overwritten, we recommend that a section is created on each page layout to house Discovery Data information. This allows custom fields to be set to update automatically, without affecting any data that may have been entered by your users.

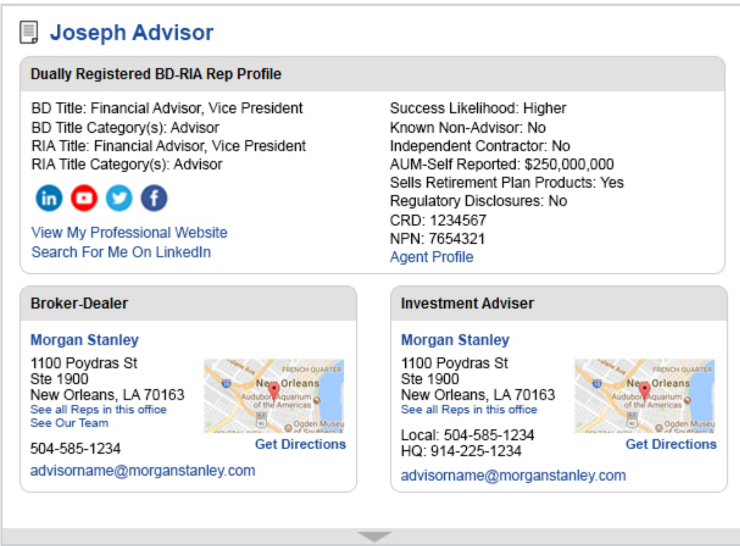
CHECK DUPLICATE MANAGEMENT SETTINGS
If you have rules in place to prevent or warn against duplicates users may encounter an error message when they select Update Record. This will display either the Alert Text you have set or a standard message letting them know an error has occurred and to contact their Salesforce Administrator for assistance.

CHECK LEAD ASSIGNMENT SETTINGS
To have active Lead Assignment Rules followed when existing Leads are updated go to MarketLink for Salesforce Sync Settings and verify the checkbox Updates Existing Leads is selected.

Discovery Data Profile

Discovery Data Profile

At the click of a button within Salesforce, the Discovery Data Profile button provides detailed profiles on all firms and over 730,000 reps in the financial services industry. Each profile includes the most extensive data to help you qualify and connect with the right clients and prospects, and always displays the most current information available in Discovery Data. It is recommended that users utilize this link when they want to view more information than what is available in Salesforce. The Discovery Data Profile button is available for the Accounts, Contacts and Leads and for users that are also Discovery Data users via single sign-on authentication.



Discovery Data Profile Tips and Best Practices

MAKE FULL USE OF THIS ACCESS TO DISCOVERY DATA

Adding and maintaining within Salesforce all of the fields available in Discovery Data would be a large and time-consuming process, and unnecessary. This is why we offer Discovery Data Profile. By using this deep link into Discovery Data, users can access the full dataset for Accounts, Contacts and Leads without you having to worry about creating and mapping fields. This button will only work if the record is linked and the Salesforce user is also a Discovery Data user.

USE THE DISCOVERY DATA PROFILE TO EVALUATE YOUR MAPPING

If your users are routinely asking why information in the Discovery Data Profile is not available to them on the Salesforce record, it may be helpful to use these fields as a guide on how to set your mapping.

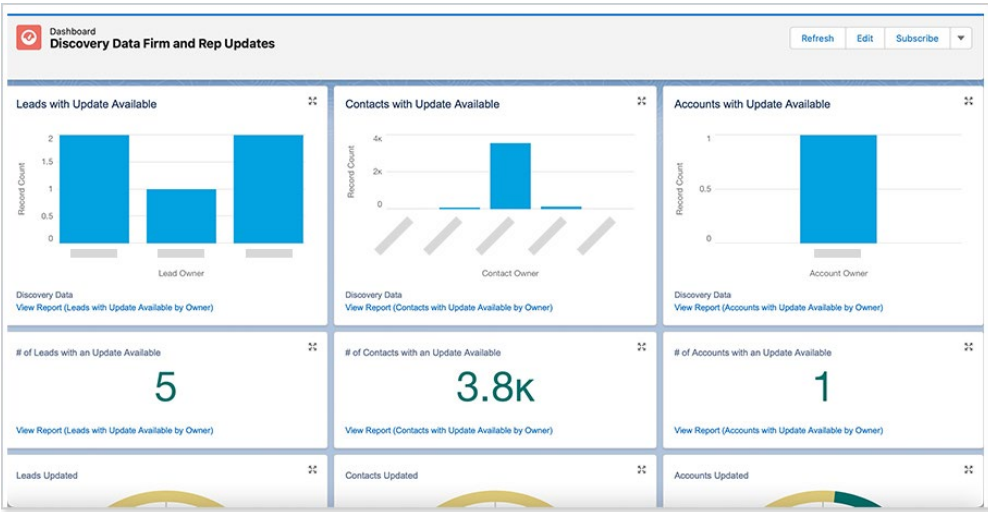
Reports and Dashboards

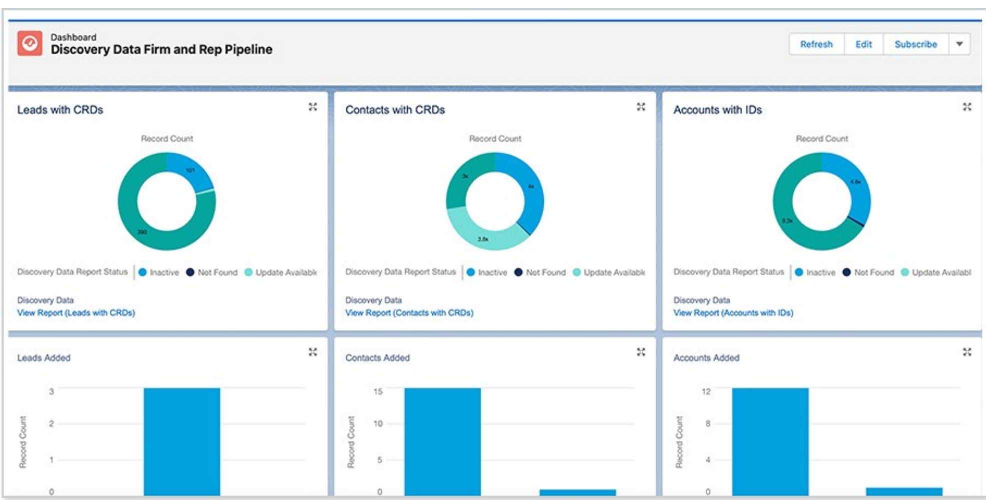
There are 18 reports available to assist your organization in using and accessing all the features of MarketLink for Salesforce.

1. Accounts Added:
   Show all New Firms added as new Accounts by Discovery Data
2. Accounts Added in Current & Previous CQ:
   Show all New Firms added as new Accounts by Discovery Data in the current and previous CQ
3. Accounts Updated:
   Show all Accounts updated by Discovery Data
4. Accounts with IDs:
   Show all Accounts with Firm CRDs/Branch IDs summarized by Discovery Data update status
5. Accounts with Inactive IDs:
   Show all Accounts inactive in the financial services industry
6. Accounts with Update Available by Owner:
   Show all Accounts with an update available summarized by Account Owner
7. Contacts Added:
   Show all New Reps added as new Contacts by Discovery Data
8. Contacts Added in Current & Previous CQ:
   Show all New Reps added as new Contacts by Discovery Data in the current and previous CQ
9. Contacts Updated:
   Show all Contacts updated by Discovery Data
10. Contacts with CRDs:
    Show all Contacts with CRDs summarized by Discovery Data update status
11. Contacts with Inactive CRDs:
    Show all Contacts inactive in the financial services industry
12. Contacts with Update Available by Owner:
    Show all Contacts with an update available summarized by Contact Owner
13. Leads Added:
    Show all New Reps added as new Leads by Discovery Data
14. Leads Added in Current & Previous CQ:
    Show all New Reps added as new Leads by Discovery Data in the current and previous CQ
15. Leads Updated:
    Show all Leads updated by Discovery Data
16. Leads with CRDs:
    Show all Leads with CRDs summarized by Discovery Data update status
17. Leads with Inactive CRDs:
    Show all Leads inactive in the financial services industry
18. Leads with Update Available by Owner:
    Show all Leads with an update available summarized by Lead Owner

Dashboards visually present an overview of updates made by MarketLink for Salesforce to existing Salesforce records and the creation of new records.

1. Discovery Data Firm and Rep Updates:
   Show all records that have Discovery Data updates
2. Discovery Data Firm and Rep Pipeline:
   Show all records and their current Discovery Data Status





Reports and Dashboards Tips and Best Practices

LEVERAGE REPORTS TO IMPROVE DATA QUALITY AND USER EFFECTIVENESS
Reports are a powerful tool for tracking the ROI of MarketLink for Salesforce. See which record owners still have pending updates that require their review, how many and which records are missing CRD/ID field(s) and are preventing MarketLink for Salesforce from updating them for you, and more.

UTILIZE THE DISCOVERY DATA REPORT STATUS FIELD
The Discovery Data Report Status field provides the same statuses as the Discovery Data Status field, but should only be utilized to summarize reports. Continue to use the Discovery Data Status field when included in a report as a column of data and not the summary field. The Discovery Data Status field will show Update Available as a link, which the Discovery Data Report Status will not. Note, when editing reports, the Discovery Data Status field will display a broken image when customizing, but displays the image when the report is run.

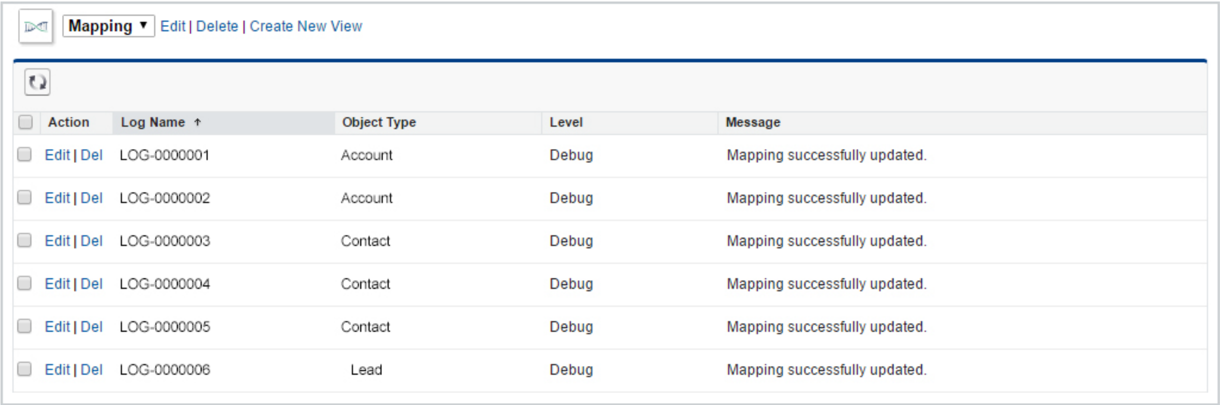
ADD DASHBOARDS TO HOME PAGE FOR QUICK ACCESS
It may be helpful to add one of the dashboards to your home page to track user progress or MarketLink for Salesforce potential.

REFRESH YOUR DATA
Remember to schedule refreshes for these and any other dashboards you have created so you are always displaying the most up-to-date data. You can also have dashboards emailed to you and/or users once refreshed so you do not have to log into Salesforce to see this information.

CREATE ADDITIONAL CUSTOMIZED REPORTS
These reports and dashboards can be used as a template for any report or dashboard that you or your users need created. We suggest when changing filters or adding and removing columns that you use Save As to keep the original report or dashboard intact.

Discovery Data MarketLink Activities

Discovery Data MarketLink Activities is a custom object installed to assist with troubleshooting, monitoring and tracking Salesforce related aspects of MarketLink for Salesforce. View details on success or failure of application features within this tab or create reports to pass this information along to colleagues.



Action	Log Name ↑	Object Type	Level	Message
Edit | Del	LOG-0000001	Account	Debug	Mapping successfully updated.
Edit | Del	LOG-0000002	Account	Debug	Mapping successfully updated.
Edit | Del	LOG-0000003	Contact	Debug	Mapping successfully updated.
Edit | Del	LOG-0000004	Contact	Debug	Mapping successfully updated.
Edit | Del	LOG-0000005	Contact	Debug	Mapping successfully updated.
Edit | Del	LOG-0000006	Lead	Debug	Mapping successfully updated.

FAQs

Is there a way to update records without scheduling a Synchronization Job?
The app provides a powerful Discovery Data Search button, which allows users to update existing records at any time. Discovery Data also offers comprehensive data cleansing services, which we recommend be completed in advance of installing this app.

What is MarketLink Cleansing?
With our MarketLink Cleansing service your records are matched to Discovery Data Archive™, an enormous, historical database where we have accumulated all of the information we have collected over the years on firms and professionals in the financial services industry. There is no database like it available anywhere and it is the best tool for matching. If throughout a rep's career they changed branch addresses within a firm twice, changed firms three times, got married and changed their last name, used a nickname and are a member of a team, there is a good chance we have all or most of that data. Once we determine a match, data updates and additions plus new records are provided, and ongoing updates can be sent on a frequent basis. Contact us to request a MarketLink Cleansing Analysis and Recommendations Report.

What if I don’t want certain data changed?
You are in complete control of what fields of data are updated. At any point you can make changes to the Discovery Data MarketLink Mapping.

What about firms and reps in my target market that aren’t in Salesforce yet?
Accounts, Contacts and Leads can be created from Discovery Data using New Firms and New Reps. Here you will work with Discovery Data to create a target market and after each Synchronization Job the results will appear in a list which can then be added to your CRM as new records. In addition, Discovery Data can provide initial target market data files for bulk import.

Does MarketLink for Salesforce create duplicates?
Duplicates can be created in rare instances. 1) If you are adding New Firms and New Reps and the current records within your Salesforce are not linked, meaning that they don’t have a CRD/ID, you may create a duplicate firm or rep that is linked. 2) If you have Contact movement enabled and the new firm association already exists in Salesforce as an Account not linked, a new Account will be created that is linked. For these scenarios, you can implement internal processes or utilize standard Salesforce settings or third party apps to manage and eliminate duplicates.

What happens when a rep moves to another firm and I have duplicate Accounts?
When a rep moves from one firm to another and there are duplicate Accounts, MarketLink for Salesforce will move the rep to the Account with the most recent activity.

What is the status code INACTIVE_OWNER_OR_USER in Discovery Data MarketLink Activity?
If you notice Accounts, Contacts and Leads can’t be updated in Salesforce and have this error in Discovery Data MarketLink Activity it means the record is assigned to an inactive Salesforce user and can’t be updated.

Why are some of my Salesforce records not updating?
The first place to look if you think data is not being updated by MarketLink for Salesforce is the Discovery Data Status field. Updated, Linked and Update Available statuses indicate that your records are either up-to-date or pending user approval of updates. The Discovery Data statuses No ID and Not Found indicate that the required CRD/ID field(s) do not match what is in Discovery Data or are missing in Salesforce. Once the CRD/ID field(s) have been updated or populated, the status field will change to Pending Link, indicating that a record will be processed during your next weekly update.

How can I see which records are not getting updated?
The Discovery Data Firm and Rep Pipeline Dashboard will provide you with all records summarized by their Discovery Data Status.

What should I do with Contacts or Accounts that have an Inactive status?
Deciding what to do with Inactive records is a decision that varies based on your business requirements. We have seen some firms delete these records from Salesforce, while others leave them as is or employ an internal inactive field on their objects so that they can exclude them from reports and list views. Ultimately the decision is up to you and Discovery Data can provide guidance if needed.

How do I contact MarketLink for Salesforce support?
Contact us at marketlinkapi@discoverydata.com for assistance.