Discovery Data

DISCOVERY DATA MARKETLINK FOR SALESFORCE

User Guide

MarketLink for Salesforce

User Guide

Welcome to MarketLink for Salesforce!

This guide, designed for Salesforce users, introduces Discovery Data MarketLink for Salesforce and helps you through daily use of the app within Salesforce.

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 is the leading provider of data, insights, and analytics on the firms and people driving the financial services and insurance industries across North America. The top asset and wealth management, fintech, media, consulting, and insurance companies turn to Discovery Data to improve their business performance.

Introduction

MarketLink for Salesforce connects our industry database to your Salesforce CRM system and keeps your records up-to-date. This includes all Accounts, Contacts and Leads that have valid CRD/ID field(s). Once a link is established, data updates take place weekly and additional profile details can be viewed in and added right from Discovery Data.

There are four major features within the app:

- Maintain accurate Accounts, Contacts, and Lead through weekly updates.
- Easily add data for new records using Discovery Data Search.
- Viewed detailed profiles in Discovery Data right from Salesforce
- Add new firms and reps that meet your target market.

How the App Works

How does Discovery Data determine a link?

The unique value that links Discovery Data to your Salesforce CRM system is the industry regulatory ID, **CRD**, which stands for Central Registration Depository. This is an official financial services industry regulatory ID never recycled, making it the ideal key to map to the Salesforce ID for your records. Discovery Data determines a successful link to Accounts using Firm CRD and to Contacts and Leads using both Firm CRD and Rep CRD.

If your firm uses a Parent Account/Branch Account/Contact hierarchy, Discovery Data's unique **Branch ID** is also utilized to determine a link.

What triggers an update?

If a linked record has a change in Discovery Data to any of the fields mapped to your CRM system, an update is triggered and new or different data is sent to Salesforce.

Discovery Data Updates

How does Discovery Data determine a link?

Accounts, Contacts and Leads have the **Discovery Data Status** field populated, alerting you that a record has been updated or there is an action that needs to be taken or key data is missing. This field is updated weekly if there is a change in Salesforce or Discovery Data and contains one of the following statuses:

Linked – The link to Discovery Data was successful and the data in your Salesforce record is identical to Discovery Data.

Updated – An update from Discovery Data has been applied to this record.

Update Available – An update is available for this record that requires your manual review.

Inactive – This record is populated with the required CRD/ID field(s) and had previously linked to Discovery Data, but the record is no longer linked. A firm with an Inactive status is no longer active in the industry. A rep with an Inactive status, in most cases, either moved to another firm or is no longer active in the industry.

Pending Link – If a CRD/ID number is typed into Salesforce, the record is pending a link to Discovery Data, which will take place weekly.

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

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 will occur in very limited cases and often will mean the rep is not in Discovery Data.

Accounts and Contacts using Branch Accounts will have a **Discovery Data Parent Status** or **Discovery Data Parent/Branch Status** field with one of the following statuses:

- **Linked** - The correct Parent Account is linked to the Branch Account or the correct Account is linked to the Contact.
- **No Parent** - There is no Parent Account linked to the Branch Account.
- **Wrong Parent or Wrong Account** - The Branch Account is not linked to the proper Parent Account or the Contact is not linked to the proper Account.
- **Not Linked** - The Account for this Contact is not linked to Discovery Data.

Accepting/Rejecting Available Updates

You can accept or reject the updates available from Discovery Data for records you own using the **Update Available** status link. While you are on a particular record you can click the link to view a side-by-side comparison of the data in Salesforce and Discovery Data. To see a list of all records you own that have this status, use the Discovery Data Updates list view.

! Update Available

From a list view:

- Go to the Accounts tab.
- Select Discovery Data Updates from the view drop down and click 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.

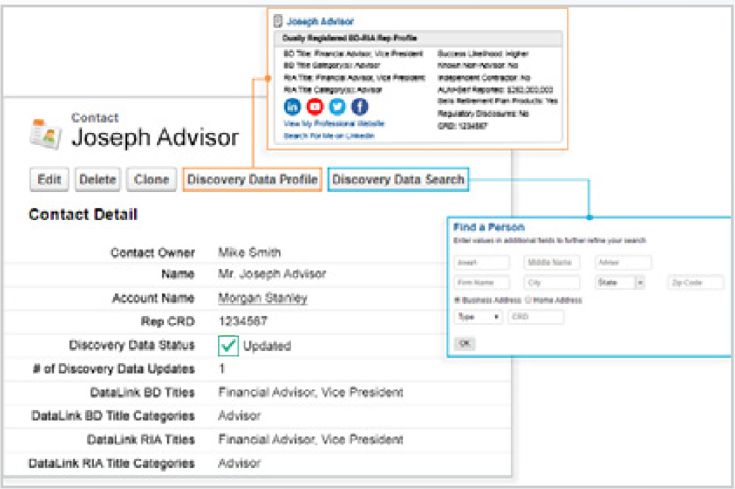
To update multiple records at once:

- Go to the Accounts tab.
- Select Discovery Data Updates from the view drop down and click Go.
- Sort by the Firm Changed checkbox to see records that may have common fields being updated due to a firm change.
- Review the Update Summary 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.

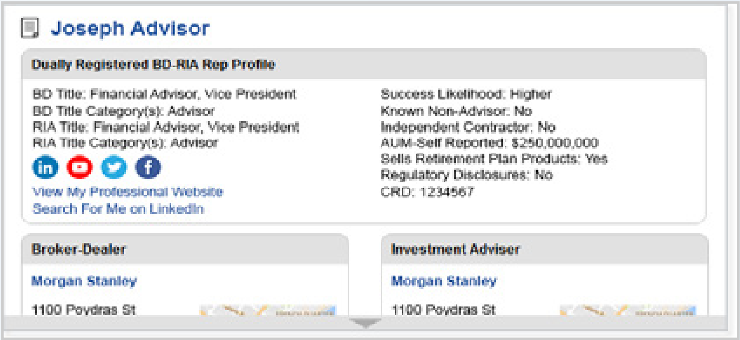
Field	Select All	Discovery Data Value	Select All	Salesforce Value
Business Phone		504-585-1234		504-585-1234
Email		advisorname@morganstanley.com		advisorname@morganstanley.com
First Name		Joseph		Joseph
Last Name		Advisor		Addvisor
Mailing City		New Orleans		New Orleans

Discovery Data Profile and Search

Two custom buttons are available on Accounts, Contacts and Leads: Discovery Data Profile and Discovery Data Search. By clicking either button, you are automatically logged into Discovery Data.



At the click of a button within Salesforce, the **Discovery Data Profile** button provides detailed profiles on BD and RIA firms and reps. 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 you utilize this link when you want to view more information than what is available in Salesforce. The Discovery Data Profile button is available for Accounts, Contacts and Leads.



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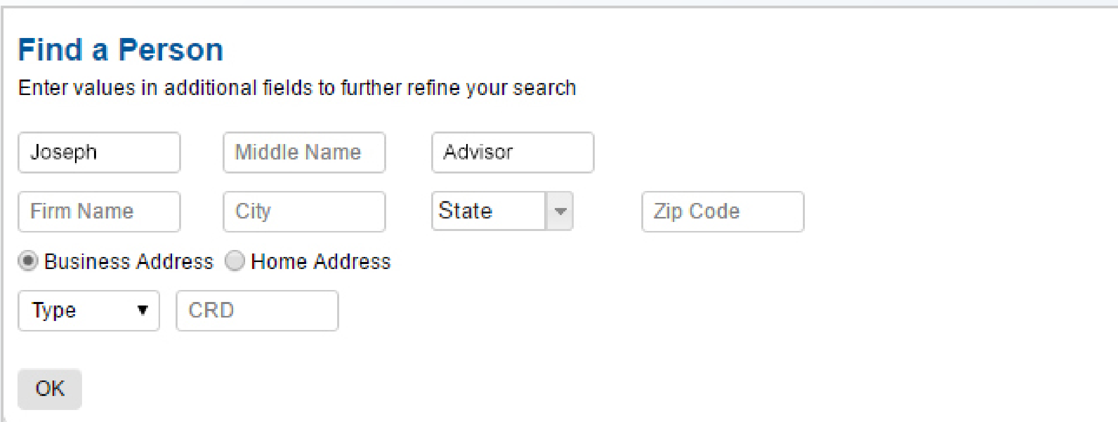
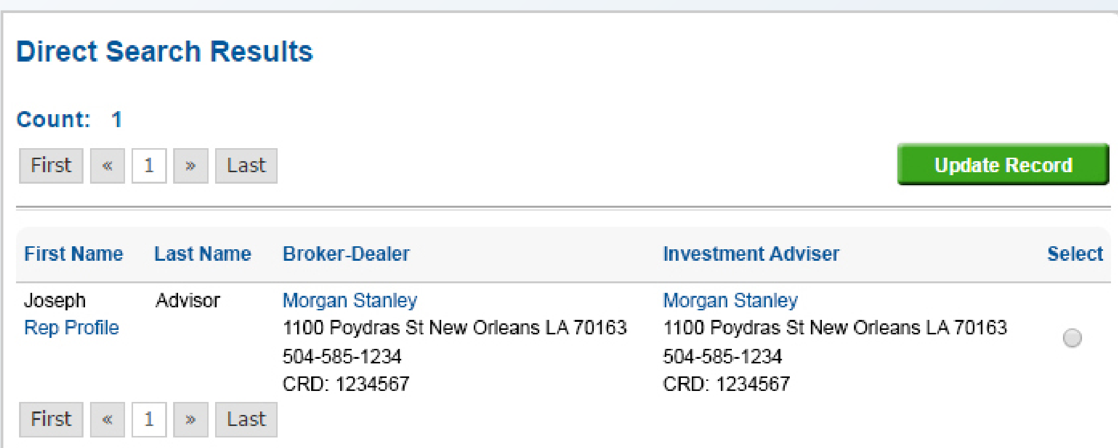
You can search Discovery Data right from Salesforce using the **Discovery Data Search** button to update existing records and quickly populate new records on demand.

- Select the Discovery Data Search button and click OK.



- Once at the Direct Search Results page, select the radio button for the record that matches the one you want updated in Salesforce and then click the Update Record button.



- Discovery Data will then display a confirmation message. Click OK. Your Salesforce record will now be populated with values from Discovery Data. If fields have been set for manual review, you will need to accept or reject these updates.

New Firms and New Reps

MarketLink for Salesforce offers an additional feature to populate new Accounts, Contacts and Leads in Salesforce based on the audience criteria your Salesforce Administrator has set up. For instance, you can be notified and have a record created every time a new Merrill Lynch advisor is added to Discovery Data within your territory. Your Salesforce Administrator will share with you more specifics regarding this part of the app.

For more information, please visit our MarketLink for Salesforce Support Center.