

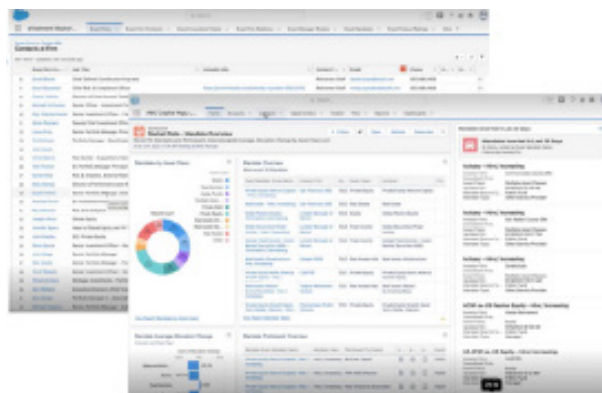
Nasdaq eVestment Market Lens for Salesforce

Integrate powerful market intelligence from Nasdaq eVestment Market Lens directly to Salesforce. Without software development or IT support.

The Nasdaq eVestment Market Lens for Salesforce application brings Market Lens data to life in your native Salesforce environment.

Data from Market Lens lives alongside your existing CRM data with no disturbance to existing data or cluttering work queues and/or dashboards.

Integrate and configure your dashboard with Market Lens data in a day, with no IT support or coding work required. Never miss a critical mandate announcement or allocation change notification.



With the Market Lens for Salesforce App you can:

Get up and running in the same-day with no Salesforce development needed

Market Lens for Salesforce can be installed and configured in less than a day and can be operated by a Salesforce Administrator, with no coding experience required or IT involvement. An advanced matching and linking operation runs in the background that connects Market Lens data with the Customer's existing data to limit manual mapping.

Enrich your proprietary data with insights from Market Lens

Market Lens data can now live alongside your existing CRM data with no risk of overwriting or impacting your existing records. Identify key professionals and contacts at investors you don't already have within your CRM, and easily link to your own records.

Use pre-built industry workflows to stay on top of changes and opportunities in your coverage area. Filter information to your territory or coverage area to only see the Plans, Mandates, Ratings, Allocations and Documents that matter to you. Schedule "Saved Search" criteria to find "hidden opportunities" in Document notes prior to Mandates being issued.

Leverage Market Lens data in your existing Salesforce automation workflows

Market Lens data lives natively in Salesforce, meaning Salesforce Administrators and Developers now have the ability to develop their own workflows, reports, and alerts using the data. Contact information from Market Lens can be:

- Added to existing Outlook email integrations with CRM
- Added to existing Marketing Automation integration with CRM
- Collaborated with other internal Sales Team members via Slack

Implementing Market Lens For Salesforce

Step 1

Once the app is downloaded from the Salesforce App Exchange, connect your Market Lens subscription using your qualifying Nasdaq eInvestment API key.

Step 2

Market Lens for Salesforce imports, links and updates the entire Market Lens data set into your Salesforce environment.

How Linking Firms and Contacts Works

- An advanced matching and linking operation runs in the background connecting Market Lens data with your firm's existing data.
- Ability to "create local copies" of Market Lens data into your Salesforce Contact tables either by curating missing Contacts one record at a time or by one Firm at a time.

Technical And Salesforce Administration Details

Customizable Job Manager Workflows

Users can customize workflows and records for enhanced insights with the 17 available functionalities.

- Mandates
- Mandate History
- Mandate Participants
- Manager Roster
- Asset Allocation
- Firm Profiles
- Firm Relations
- Firm Key Contacts
- Consultant Firm Clients
- Product Ratings
- Investor Plans
- DOL Asset Allocations
- Service Providers
- DOL Manager Roster
- Documents
- Products
- Universes

Expanded Functionality

Record Staging / Transformation / Loading Jobs: Process Staged Records to transform and load Market Lens data into a mirrored database within your Salesforce organization, optimized for Salesforce user navigation and reporting.

Matching Jobs: 4 Data Duplicating and Matching Jobs help link your account and contact data with Market Lens Firm and Contact Data. Data linking jobs can be run based on selected schedules. Data Matching and Duplicate rules out of the box and can be further configured after initial set-up.

Matching Data Functionality: Custom Lightning Web Components identify matching Firm and Contact records in the Market Lens data set.

Job Scheduler: Find updated Market Lens data and updates via recommended sequences and recommended intervals or customize when jobs run and in which order by preference.

Job Monitor: The Job Monitor interface allows Data Administrators to view when Jobs start and stop, as well as provide summary statistics into the successful matching of existing data or onboarding new data.

To request a tour of Market Lens for Salesforce, visit nasdaq.com/solutions/evestment

