



ChatGPT Connector Setup Guide

Use Dakota Marketplace data inside ChatGPT

WHAT YOU WILL NEED

- An active Dakota Marketplace membership
- An active ChatGPT Enterprise or ChatGPT Business subscription
- Your Dakota Marketplace login credentials

Questions? Contact support@dakota.com | dakota.com

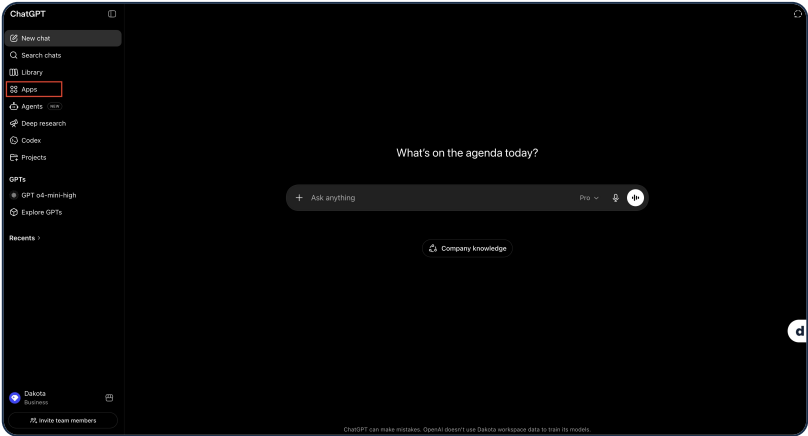
What is the ChatGPT Connector?

The Dakota Marketplace ChatGPT Connector lets you query Dakota's institutional allocator intelligence directly inside ChatGPT. Ask ChatGPT to build call lists, research accounts, draft outreach, and prep for meetings using live Dakota data. No switching tabs. No copy-paste. Your data, in your AI workflow.

Use Case	Example Prompt
Find allocators	Find family offices in Chicago allocating to private credit
Build a call list	Build a list of RIAs with AUM over \$1B interested in alternatives
Research an account	Summarize GIC Group's investment preferences and recent activity
Draft outreach	Draft a cold email to the CIO at Rockefeller Capital Management
Meeting prep	What should I know before calling Siguler Guff tomorrow?

1 Open Apps from the left sidebar

Log in to ChatGPT at chatgpt.com with your Enterprise or Business account. In the left sidebar, click Apps to open the connector directory.



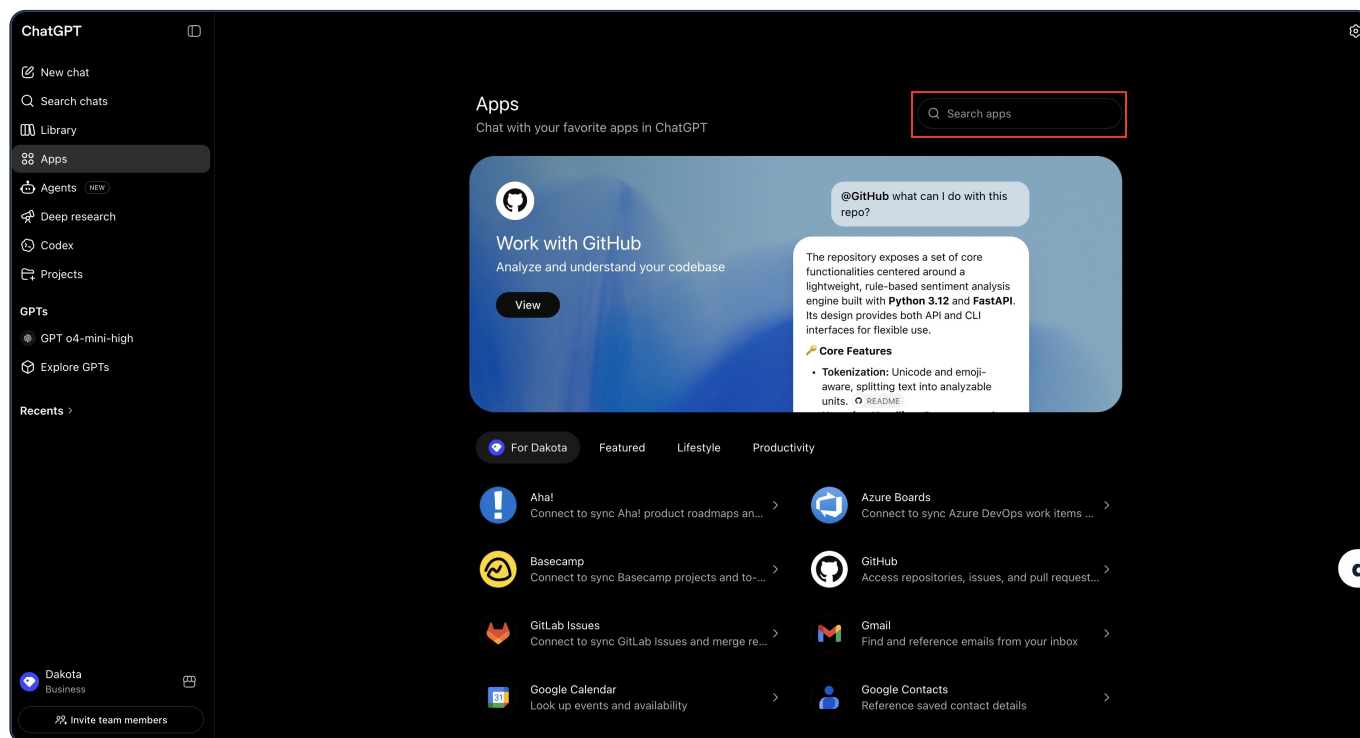
ChatGPT sidebar — click Apps

TIP

Make sure you are signed in with the email on your ChatGPT Enterprise or Business plan. The Apps directory is not available on free or Plus accounts.

2 Search for Dakota in the Apps directory

The Apps page will open with featured connectors. In the top-right search bar, type Dakota to find the Dakota Marketplace connector.

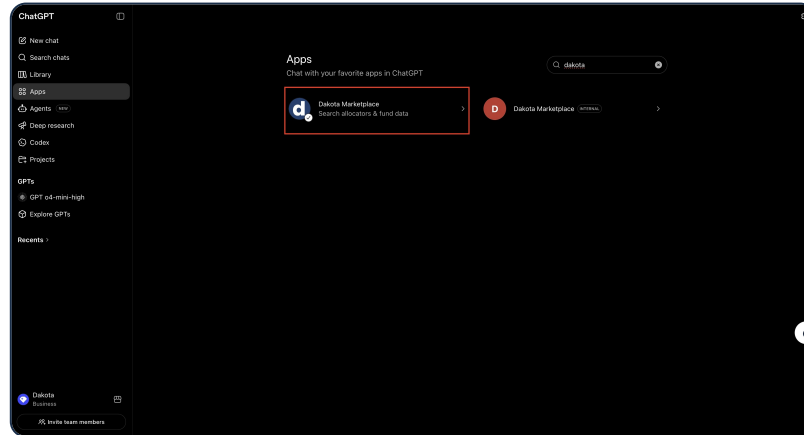


Apps directory — use the search bar in the top right

3

Select Dakota Marketplace from the results

The Dakota Marketplace connector will appear in the search results. Click the card to open the connector page.



Search results — click the Dakota Marketplace card

TIP

If you see two Dakota Marketplace listings, choose the public one (not the one tagged Internal) unless your administrator has instructed otherwise.

4 Click Connect on the connector page

You will land on the Dakota Marketplace connector page. This page shows what the connector can do and the data it accesses. Click the Connect button in the top right to begin authentication.

The screenshot shows the ChatGPT interface with the Dakota Marketplace connector page. The left sidebar contains navigation options: New chat, Search chats, Library, Apps (selected), Agents (NEW), Deep research, Codex, Projects, GPTs, and Recents. The main content area displays the Dakota Marketplace logo and a 'Connect' button in the top right corner. Below the logo, there is a search bar and a description of the platform. A sample search result is shown, listing RIA allocators in Boston that allocate to crypto. The table below shows the results of the search.

RIA allocator	Office	AUM
Pathstone	Boston, MA	\$110
Partners Capital Group	Boston, MA	\$90
SCS Financial Services	Boston, MA	\$45

Dakota Marketplace is an investment research and institutional sales intelligence platform used by thousands of leading investment firms. Search and analyze 250,000+ LP accounts, 386,000+ verified contacts, 640,000+ private companies, and 57,000+ private funds. Every allocator account is 100% verified as actively allocating capital to outside managers, updated daily by a 60-person research team. Built for fundraisers, deal teams, and capital raisers who need context, not just contacts.

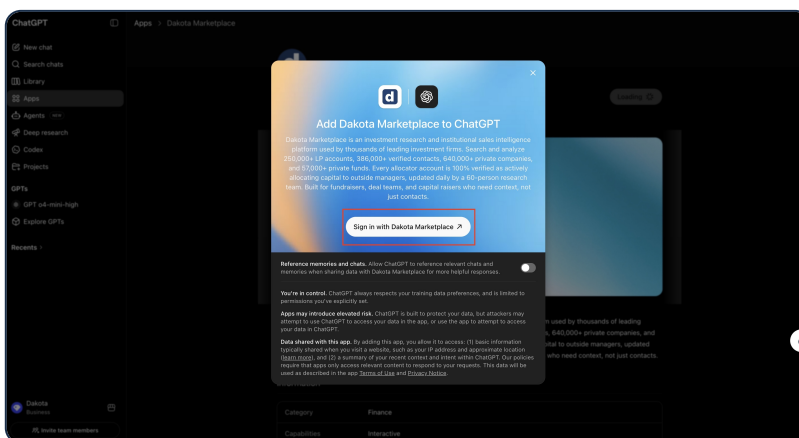
Information

Category	Finance
Capabilities	Interactive

Dakota Marketplace connector page — click Connect

5 Sign in with your Dakota Marketplace credentials

A dialog will appear asking you to add Dakota Marketplace to ChatGPT. Click Sign in with Dakota Marketplace and authenticate with the same email and password you use on dakota.com.



Authentication dialog — click Sign in with Dakota Marketplace

TIP

Use the same credentials you use to log into dakotanetworks.my.site.com — your Marketplace account email and password.

6

Confirm the connection and start chatting

After authenticating, the connector page will refresh and the button in the top right will change to Start chat. This confirms Dakota Marketplace is connected. Click Start chat to open a new conversation with the connector active.

The screenshot shows the ChatGPT interface with the Dakota Marketplace connector page. The left sidebar contains navigation options: New chat, Search chats, Library, Apps (selected), Agents, Deep research, Codex, Projects, GPTs, and Recents. The main content area displays the Dakota Marketplace logo and a search bar. A red box highlights the 'Start chat' button in the top right corner. Below the search bar, there is a preview of a search result showing a table of RIA allocators in Boston.

RIA allocator	Office	AUM
Pathstone	Boston, MA	\$110
Partners Capital Group	Boston, MA	\$90
SCS Financial Services	Boston, MA	\$43

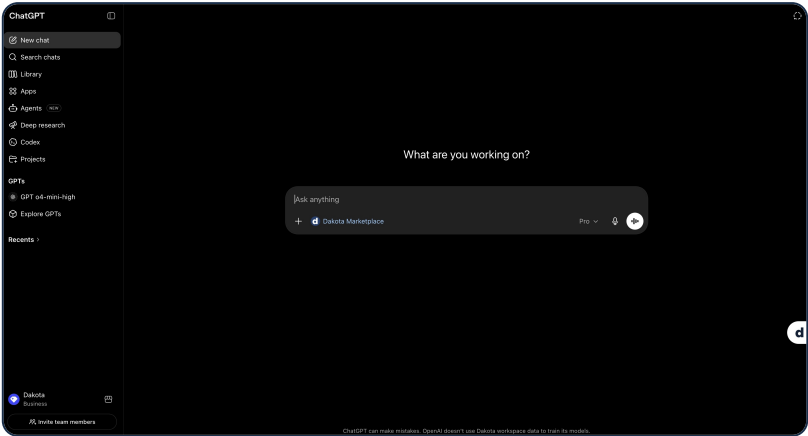
Information

Category	Finance
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Connector page — Start chat confirms the connection is active

You are connected. Start using it.

Dakota Marketplace will now appear in your Apps directory with a checkmark, confirming the connection is active. Open a new ChatGPT conversation, attach Dakota Marketplace, and try these prompts to get started:



Apps directory — Dakota Marketplace shown as connected

Use Case	Example Prompt
Find allocators	Find me 10 family offices in Texas investing in private equity with verified contacts
Research an account	What do you know about Rockefeller Capital Management's investment preferences?
Build a call list	Build a list of endowments and foundations with over \$500M AUM allocating to real assets
Draft outreach	Draft a cold email to the CIO at a mid-size RIA interested in liquid alternatives
Deal sourcing	Find private companies in healthcare IT in the Southeast backed by PE sponsors
Meeting prep	Summarize everything Dakota has on GIC Group before my call tomorrow