dakota CRM Integrations

salesforce Webinar

Webinar

Post-Call Notes

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Overview

Dakota hosted a product webinar unveiling version 4.0 of the Dakota Marketplace Salesforce app, walking through the newest enhancements to account and contact linking, custom list views, record page detail, and permissions. The session was presented by Pat Tighe, Head of Product, and Dominique Mortelliti, Account Executive for CRM Integrations, and included a live demo of the new release.

Agenda

1. Welcome & Introductions
2. What's New in v4.0: Key Enhancements
3. Live Demo Walkthrough
4. Upgrade Path & Next Steps

What's New in v4.0: Key Enhancements

- Link or create contacts directly from the related list preview on the account view, making it seamless to add new or existing contacts without leaving the record.
- Save custom searches and list views directly from the Dakota Marketplace Accounts and Contacts tabs, so frequently used filtered lists are ready whenever needed.
- One-click account and related contacts linking — accounts and all their related contacts can now be linked in a single action instead of two separate steps.
- Dakota Recommends is now accessible directly within the CRM, giving traveling sales teams curated city guides for hotels, coffee shops, event spaces, and more.
- Export specific lists straight from the Accounts and Contacts tabs to Excel, useful for sharing with colleagues before deciding what to pull into the CRM.
- Mass unlink records from Marketplace Search, so accounts or contacts linked in error can be removed in bulk.
- Related lists (investments, searches, consultant contacts, manager presentations, consultant reviews, and more) now appear directly on the account record page.

Live Demo Walkthrough

Marketplace Accounts & Contacts Tabs

- The former single Dakota Marketplace Search tab has been split into separate Marketplace Accounts and Marketplace Contacts tabs.
- Users can filter by metro area, investment preferences, and other criteria, then save the result as a named custom list view.
- Saved list views can be renamed, updated, pinned, unpinned, or deleted; pinned lists load automatically the next time the tab is opened.
- An export button lets users download any custom list to Excel directly from the tab.
- A reset/refresh option clears filters or refreshes the page after linking activity.

Linking Enhancements

- The mass action dropdown now includes a combined "link the account and its related contacts" option, alongside the existing create and link actions.
- Fuzzy matching connects accounts by name, phone number, website, or CRD number; contacts are matched by full name.
- Linking an account and its contacts is now a single action rather than two separate steps.

Record Page Enhancements

- A new Nearby Accounts map view shows records located close to a given account, useful for scheduling in-person meetings.
- A Marketplace Updates tab surfaces any changes made to the record over time.
- New Dakota Details fields have been added at the account level, including number of QPs and average ticket size by strategy (hedge funds, private credit, private equity, private real estate, and real assets), along with additional investment detail fields.
- Contacts can now be linked or created directly from the account record page, with a link icon confirming once a contact has synced.
- All related Dakota Marketplace lists for an account — clients, consultant reviews, searches, allocations, Dakota content, and more — now appear as tabs directly on the record.
- Records can be unlinked individually from the record page, or in bulk via the mass action dropdown.

Metro Areas & Additional Tabs

- Dakota Recommends is now available within the Metro Areas tab, including hotels, restaurants, event spaces, coffee shops, and city guides.
- The Map It / nearby accounts feature is available across account and contact record pages.
- Additional read-only tabs are now available within Dakota Marketplace, including Consultant Reviews, Pension Documents, Fund Presentations, Earnings Intelligence, Private Funds, Fund Launches, Hedge Fund Performance, Private Companies, Private Fund Performance, Alumni Network, and All Documents (formerly Manager Presentations).
- These tabs support custom list views but are read-only — data viewed there is not stored in Salesforce.

Permissions & Sharing

- A new Dakota Marketplace read-only user permission set restricts non-admin users to view-only access, with no ability to create, link, or run mass actions.
- •Sharing rules can be updated through the integration with support from the Dakota Salesforce admin team.
- This addresses requests from client data teams who wanted the ability to limit sales team members to view-only access.

Upgrade Path for Existing Customers

- Existing Dakota Marketplace for Salesforce customers will be contacted by the Dakota team to schedule their upgrade to v4.0.
- Customers who want to move faster can reach out to Dominique Mortelliti directly to get the upgrade scheduled sooner.

Next Steps

- Book a live demo with the Dakota team at dakota.com to see the v4.0 release firsthand.
- Existing customers can expect outreach from the Dakota team, or may proactively reach out to schedule their upgrade.

Ready to get started?

Book a demo here!