



DAKOTA MARKETPLACE

# Claude Setup Guide

Connecting Dakota Marketplace to Claude – search Dakota’s allocator, contact, and private fund data in plain English, right inside a conversation.

*“Find family offices in Boston with at least \$1B AUM allocating to private credit” – ask, and Claude answers from Dakota Marketplace records. No fabricated names, contacts, or figures.*

This guide walks you through connecting your Dakota Marketplace subscription to Claude. The same setup works for both Claude on the web (claude.ai) and the Claude Desktop app – configure the connector once on your account and it follows you to every device where you sign in.

#### AUDIENCE

Dakota Marketplace subscribers

#### SETUP TIME

About 5 minutes

#### WORKS WITH

Web · Desktop · Mobile

## SECTION 01

# Before You Begin

## What you need

- An active Dakota Marketplace subscription. You'll sign in with your existing Dakota credentials during setup.
- A Claude account. Custom connectors are available on Free, Pro, Max, Team, and Enterprise plans. Free accounts are limited to one custom connector.
- The Dakota Marketplace MCP server URL, provided to you by Dakota:

```
https://marketplace-mcp.dakota.com/mcp
```

## If you're on a Claude Team or Enterprise plan

On Team and Enterprise plans, only an organization Owner can add a custom connector for the whole organization. If you are not an Owner, forward this guide to whoever administers your company's Claude workspace – they follow the Team / Enterprise steps once, after which every member can connect with a single click.

**TIP**

Claude connects to the Dakota Marketplace MCP server from Anthropic's cloud, not from your laptop. You don't need to install anything, run any code, or open any firewall ports on your machine.

## SECTION 02

# Set Up on Claude (Web)

Use this section if you primarily use Claude in a web browser at [claude.ai](https://claude.ai). The connector you add here also works in Claude Desktop and the mobile apps once you sign in with the same account.

## For Pro and Max plans

- 1 Sign in to [claude.ai](https://claude.ai) in your browser.
- 2 In the left sidebar, click your name, then choose **Settings**.
- 3 In the Settings menu, click **Connectors** (or go directly to [claude.ai/settings/connectors](https://claude.ai/settings/connectors)).
- 4 Click the + button, then choose **Add custom connector**.
- 5 In the **Remote MCP server URL** field, paste the Dakota Marketplace MCP server URL above.
- 6 Give the connector a **Name** – we recommend **Dakota Marketplace**.
- 7 Leave **Advanced settings** alone unless Dakota Support has given you a specific OAuth Client ID and Secret. The server handles authentication in the next step.
- 8 Click **Add**.
- 9 Back on the Connectors page, find **Dakota Marketplace** and click **Connect**.
- 10 A Dakota sign-in window opens in a new tab. Sign in with your Dakota Marketplace email and password and approve access.
- 11 When the window closes, the page shows **Dakota Marketplace as Connected**. You're done.

## For Team and Enterprise plans

### Step A — An organization Owner adds the connector once

- 1 Sign in to [claude.ai](https://claude.ai) as an Owner or Primary Owner.
- 2 Go to [Organization settings › Connectors](#).
- 3 Click **Add**, hover over **Custom**, then click **Web**.
- 4 Enter the Dakota Marketplace MCP server URL.
- 5 Set the name to **Dakota Marketplace** and leave Advanced settings alone unless you have credentials from Dakota.
- 6 Click **Add**. The connector is now available to everyone in your organization.

### Step B — Each team member connects their own Dakota account

- 1 Sign in to [claude.ai](https://claude.ai).
- 2 Go to [Customize › Connectors](#).
- 3 Find **Dakota Marketplace** (marked **Custom**) and click **Connect**.
- 4 Sign in with your individual Dakota Marketplace credentials. Each user authenticates separately, so Claude only ever sees the data that user is entitled to.

#### IMPORTANT

Every user must authenticate with their own Dakota Marketplace login. The Owner who adds the connector does not log in on anyone else's behalf, and Dakota credentials are never shared between users.

## SECTION 03

## Set Up on Claude Desktop

If you already added the connector on [claude.ai](https://claude.ai) using Section 02, you don't need to do anything else – it appears in Claude Desktop the next time you sign in. Skip ahead to *Using Dakota Marketplace in a Conversation*. To add it from inside Claude Desktop instead, follow the steps below.

### Install Claude Desktop

- 1 Download Claude Desktop from [claude.com/download](https://claude.com/download) and install it on your Mac or Windows PC.
- 2 Open Claude Desktop and sign in with the same Claude account you use on the web.

### Add the Dakota Marketplace connector

- 1 In Claude Desktop, click your profile icon and choose **Settings**.
- 2 Select **Connectors** from the left side of the Settings window.
- 3 Click **+ Add custom connector**.
- 4 Paste the Dakota Marketplace MCP server URL: `https://marketplace-mcp.dakota.com/mcp`
- 5 Set the name to **Dakota Marketplace**.
- 6 Click **Add**.
- 7 Find Dakota Marketplace in the connector list and click **Connect**. A browser window opens.
- 8 Sign in with your Dakota Marketplace credentials and approve access. When the window closes, the status changes to **Connected**.

#### NOTE FOR TEAM & ENTERPRISE MEMBERS

If your Claude workspace is on a Team or Enterprise plan, you won't see an "Add custom connector" button – your organization Owner must add Dakota Marketplace from Organization settings first (see Section 02). After that, the connector shows up in your Connectors list and you only need to click Connect.

## SECTION 04

## Using It in a Conversation

Once the connector shows as Connected, you can use it in any Claude conversation.

### Enable the connector for a chat

- 1 Open a new chat in Claude (web or desktop).
- 2 Click the + button in the lower-left of the composer, then choose **Connectors**.
- 3 Toggle **Dakota Marketplace** on. The toggle is remembered per conversation — you can disable it again at any time.
- 4 Ask your question. Claude tells you which Dakota tool it's calling and may ask you to approve the first call.

### Example prompts to try

*Find family offices in Boston with at least \$1B AUM allocating to private credit.*

*Who handles emerging manager allocations at MIT Investment Management?*

*Show recent fundraising news for healthcare-focused private equity.*

*List the top ten public pensions investing in real assets in the Midwest.*

*Pull the contact and recent activity for Brown University Endowment.*

#### TIP

Claude says so when a record isn't in Dakota Marketplace rather than guessing. If a result looks incomplete, ask Claude to search again with different criteria, or check the record directly in Dakota Marketplace.

## SECTION 05

# Troubleshooting

## › “Connect” opens a Dakota page that won’t load or shows an error

- Confirm you have an active Dakota Marketplace subscription by logging in directly at dakota.com.
- Disable any browser extensions that block pop-ups or third-party cookies for the Dakota sign-in page.
- Try again in a private / incognito window.

## › Claude says it cannot reach the Dakota Marketplace connector

- In Claude’s Connectors settings, click the three-dot menu next to Dakota Marketplace, choose Disconnect, then Connect and sign in again.
- Confirm the MCP server URL exactly matches what Dakota provided — no trailing spaces, no extra characters.
- If your company uses a strict corporate firewall, ask IT to confirm outbound traffic to Anthropic’s service is allowed. The connector is hosted by Dakota and accessed from Anthropic’s cloud, so your local network doesn’t need to reach it directly.

## › I added the connector but I don’t see it in my chat

- Make sure you’re signed in to Claude with the same account you used during setup.
- Click the + button in the composer and check that the Dakota Marketplace toggle is switched on.
- On Team / Enterprise plans, confirm your organization Owner has finished adding the connector at the organization level.

## › I want to remove the connector

- Go to [Customize › Connectors](#) (or Organization settings › Connectors for Team / Enterprise Owners), click the three dots next to **Dakota Marketplace**, and choose **Remove**.

## SECTION 06

## Security & Privacy

### Your password is never shared

Authentication uses a standard OAuth flow on Dakota's sign-in page. Claude receives a per-user access token that can be revoked at any time.

### Each user authenticates individually

Claude can only retrieve Dakota records that your own Dakota Marketplace subscription is entitled to.

### Disconnect at any time

Removing the connector from Claude immediately revokes its access to your Dakota account.

### Dakota data stays grounded

The server only returns information that exists in Dakota's records. Claude says so when a record isn't available rather than fabricating one.

### PER-CONVERSATION CONTROL

You can disable the Dakota Marketplace connector for any individual chat using the + menu in the composer.

## SECTION 07

## Need Help?

### Dakota Support

For questions about your Dakota Marketplace subscription, the MCP server URL, or anything specific to Dakota data, contact [support@dakota.com](mailto:support@dakota.com).

### Claude & Connectors

For questions about Claude itself — connector settings, plan limits, or sign-in issues — see Anthropic's [Custom Connectors help article](#).