

May 15, 2011 Charlotte, NC

RIA Database Launches Salesforce.com Integration Tool

RIA Database announced the launch of a new integration tool for Salesforce.com. “Nearly 50% of our clients use Salesforce.com,” said Julie Cooling, Founder & CEO of RIA Database (www.RIADatabase.com). “We made a simple and stress-free, 3 step data mapping and integration wizard for our clients’ CRM system.”

RIA Database Julie@riadatabase.com
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Search | Results Summary | RIA Database Reports | Your Lists & Searches | Definitions | Please Note | File Matching

Salesforce Integration

49 Advisors match your search criteria

Sort by: [Name](#), [Location](#), [Total Assets](#) Select All Refresh Add To Salesforce

1. ASPIRIANT, LLC 101 SECOND STREET, SUITE 1400 SAN FRANCISCO, CA 94105 Phone: 415-371-7800 Fax: 415-371-7801 www.aspiriant.com	Total Assets: \$4,558,692,864 Discretionary Assets: \$3,384,559,104 Discretionary Accounts: 2,823 Financial Planning Assets: \$0	<input type="checkbox"/>
2. ATHERTON LANE ADVISERS, LLC 3000 SAND HILL ROAD, BLDG. 1, SUITE 170 MENLO PARK, CA 94025 Phone: 650-233-1200 Fax: 650-233-1201 www.athertonlane.com	Total Assets: \$2,252,702,208 Discretionary Assets: \$2,129,118,848 Discretionary Accounts: 667 Financial Planning Assets: \$0	<input type="checkbox"/>
3. BALASA D'INVERNO FOLTZ, LLC 500 PARK BOULEVARD, SUITE 1400 ITASCA, IL 60143 Phone: 630-875-4900 Fax: 630-875-1150 www.bdfic.com	Total Assets: \$1,740,041,216 Discretionary Assets: \$1,641,062,272 Discretionary Accounts: 3,095 Financial Planning Assets: \$0	<input type="checkbox"/>
4. BALLENTINE PARTNERS 230 THIRD AVENUE, SUITE 6 WALTHAM, MA 03894 Phone: 781-341-1300 Fax: 781-359-8412 www.balentinepartners.com	Total Assets: \$3,246,000,128 Discretionary Assets: \$1,928,000,000 Discretionary Accounts: 1,070 Financial Planning Assets: \$0	<input type="checkbox"/>

Please login into your Salesforce account and choose where to map this data:

Salesforce Email Address:

Salesforce Password:

Salesforce Security Token*:

Data Should Map To: Accounts AND Contacts
Accounts AND Contacts
Leads

Step 1: Choose some or all for importing

Step 2: Login to Salesforce.com right through RIA Database and choose to add as Accounts/ Contacts or Leads

Salesforce Integration

4 Firm(s) Selected for Import

[New Search](#) | [Your Saved Mapping](#) | [Save This Mapping](#)

Map Firm Fields

RIA Database Fields	Map to:	Salesforce Fields
CRD Number	Map to:	Create RIA_CRD_number
Firm Name	Map to:	Account Name
Address 1	Map to:	Billing Street
Address 2	Map to:	
City	Map to:	Billing City
State	Map to:	Billing State/Province
Zip	Map to:	Billing Zip/Postal Code
Phone	Map to:	Account Phone
Fax	Map to:	
Website	Map to:	Website
Total Assets Under Management	Map to:	Create RIA_AUM_total
Total Accounts	Map to:	Create RIA_total_of_accounts
Discretionary Assets	Map to:	Account Type
Discretionary Accounts	Map to:	Parent Account ID
Average Account Size	Map to:	Billing Street
		Billing City

Step 3: Map the fields, save you mapping, and import the data.

Call RIA Database for a demo: 704.543.4554.