

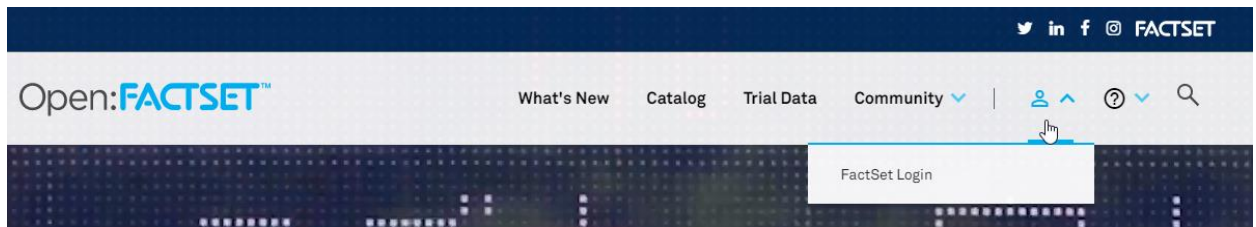


Dear Open:FactSet Partner,

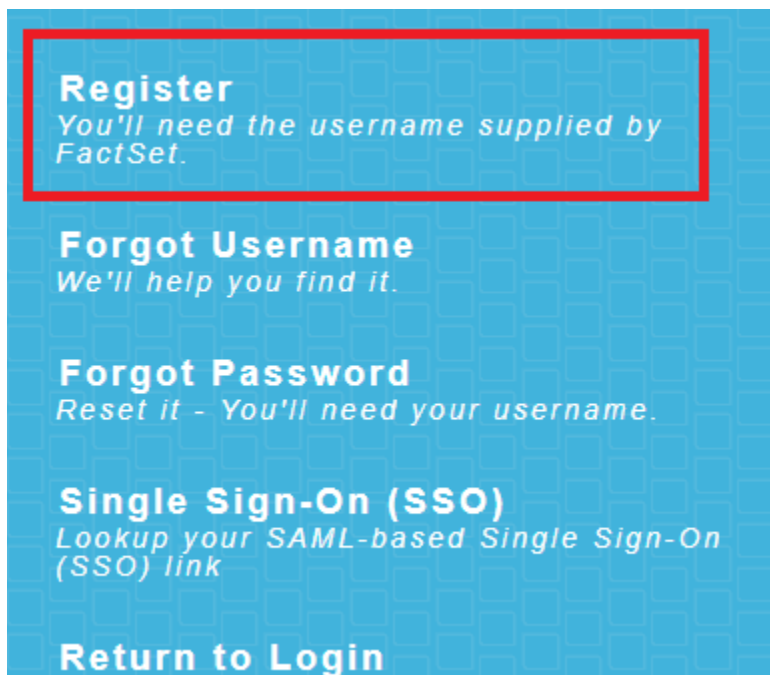
You can now create your Open:FactSet Marketplace catalog pages. Please visit <https://open.factset.com> and follow these steps to access your account:

1. In the upper-right, log-in using your FactSet.net ID.

FactSet.net IDs are typically **firstname.lastname@factset.net**. Please reach out to OFSupport@factset.com to confirm yours if necessary.



You will need to register the first time you log in. A passcode will be emailed to your company email.



2. Once logged in, click on your name in the upper right. You should see “My Account” in the drop-down. This will take you to your dedicated section of our Content Management System. Please complete/review all required* fields. There are 3 tabs:
 1. My Account – basic firm contact info (if you self-registered this will already be completed based on the information from your initial submission).
 2. Company Page – company details including social media links, firm description, etc. Note that the Company Info field has a max of 500 characters. Your logo must be a file less than 50kb in size, ideally .SVG format but PNG will also work. Transparent backgrounds look best on our site.
 3. Products – product details including a description, at least one bullet point, and at least one product tag. You may also add sample data files, documentation files or URLs, and/or a coverage table. See our [Suggestions for Webpage Copy Document](#) for additional details and information as to the language preferred by our editors.
3. We recommend that you use the Save button often. Once you are satisfied with your inputs, use the Submit for Approval buttons on the company page and the product page(s). We review submissions daily, but please email OFSupport@factset.com if you would like more immediate attention.

Note that the Recall button is available should you need to access a page to make additional edits.

4. Our editors will review your page(s) and may pass suggested edits back to you for your approval. Once the page has been finalized it will be published on the [Open:FactSet Marketplace](#).
5. Once published you can log back in at any time to make changes. The Create a New Version button will allow you to make changes to the latest version of your page. You may edit, save and submit to start the review process again. See Appendix A & B for Partner & Product workflow diagrams.

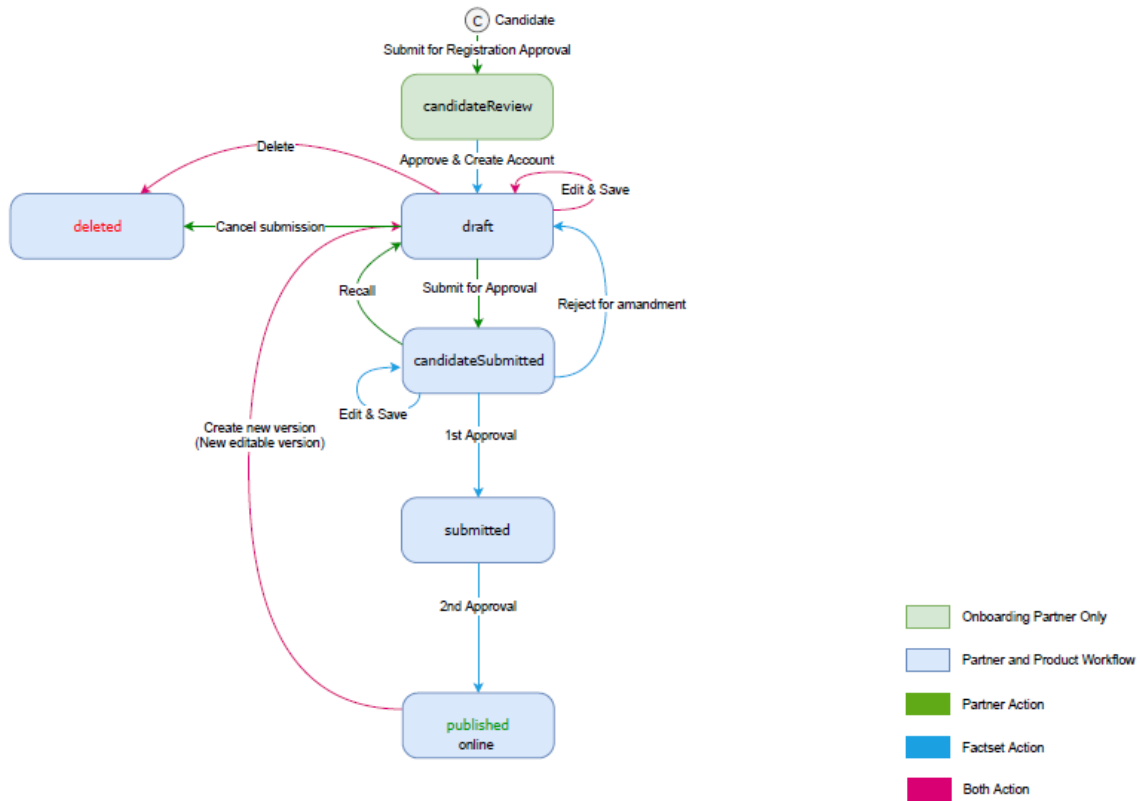
Please don't hesitate to let us know if you have any questions.

Sincerely,

The Open:FactSet Team

OFSupport@factset.com

Appendix A: Partner CMS Workflow



Appendix B: Product CMS Workflow

