

Open:FactSet Guidelines for Creating Catalog Pages

General

For new providers in the Candidate/Onboarding stage:

- Number of Pages - The fewer pages the better. Typically, it's best to start with one product page and then once FactSet starts the integration process we can schedule a call about packaging and additional pages if necessary.
- Product Type - In general all providers should create Data Feed products (as opposed to API or Solution). Again, once we begin onboarding we can always edit or add product types as needed.
- Tags - The fewer the tags the better. This is especially important for FactSet's Digital Transformation initiatives as we work to make discovery more seamless.

Suggestions for Web Page Copy

Company Page

- Note the character limits for each field.
- Avoid superlatives, e.g. words such as "broadest" or "deepest". Please use alternatives such as "broad" and "deep." or use adjectives such as "leading" or "one of the leading".
- Firm types and target markets may be helpful but avoid mentioning specific client names or details.
- Logos should be min 500 pixels wide and less than 50kb with a transparent background. PNG is accepted, but SVG is preferred due to reduced load times and optimal display across all browsers and mobile apps.

Product Page

- Note character limits for each field.
- Product Name determines the URL to access a page. Aim to be descriptive but succinct.
- Please keep information on your product page relevant to your data feed product(s) only.
- Show don't tell - Use active vs. passive language so copy is more action-oriented and compelling. Start sentences with verbs such as "leverage", "identify", "gain", "utilize", etc.
- Focus on why the product/content *matters* - Avoid stating what the product is vs. what a client can do with it and the challenges it solves.
- Clarity – Don't assume knowledge on behalf of the reader. Avoid using technical descriptions and acronyms that can be confusing.
- Avoid superlatives (see above).
- Links and Additional Research – Ensure all URLs you provide are publicly available.
- Public v. Private documents & links – If something is marked public it will be visible to anonymous browsers. Otherwise it will be private (hidden behind a FactSet.net login).
- Coverage Table – A coverage table is optional. It can have a maximum of 15 rows and between 2-4 columns. Edit the column headings to create a table that best represents your content set.