

February 2024 Release Notes

Production Environment

MATCHBOOK RELEASE UPDATE

In the interest of our customers, users, and product experience, the Matchbook AI leadership team has decided to launch our latest Production updates on the following date:

PRODUCTION ENVIRONMENT RELEASE IS CURRENTLY SCHEDULED FOR SATURDAY, FEBRUARY 3rd, 2024

With our February 2024 release, we at Matchbook AI continue to innovate and evolve our platform to satisfy our customer needs and ever-changing industry demands.

We will continue to deliver additional enhancements based on our customers' feedback. Please help us by sending an email to success@matchbookai.com with your input.

PRODUCTION Release Date:

Saturday, February 3rd 2024 @ 9:00 PM EDT / 6:00 PM PDT

This is a maintenance downtime notice for the Matchbook Production environment. During this period, the system will be offline for 3 hours starting at the times noted above.

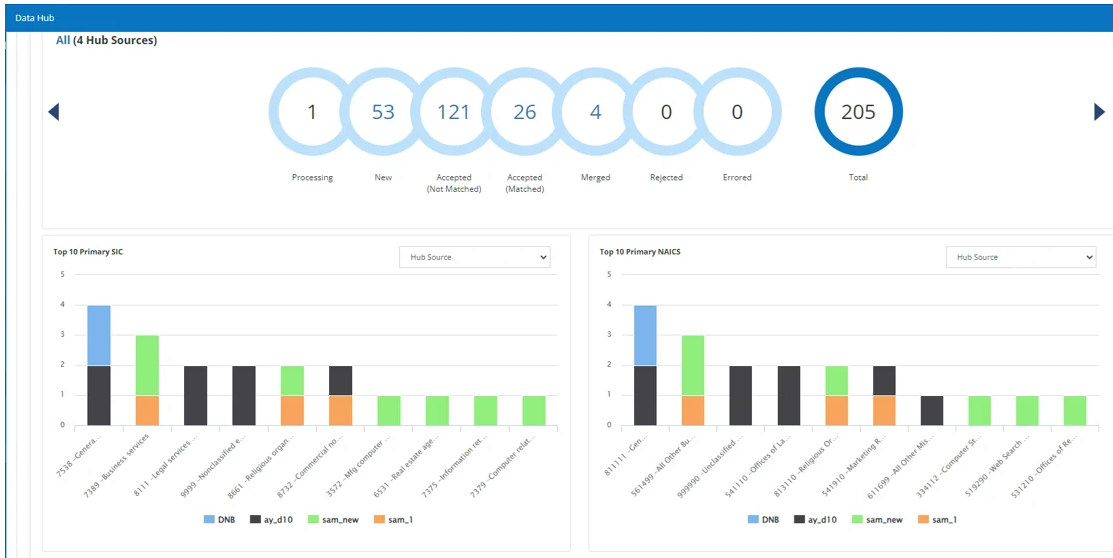
Data Hub

The Matchbook AI Data Hub is your home base to integrate, manage and govern your company's enterprise data. It enables you to seamlessly oversee your data with multiple industry-leading third-party reference data providers including Dun & Bradstreet, Moody's, Experian, and many others. Data Hub allows you to combine numerous disparate sources and align them to form a single, real-time holistic view that yields actionable results. Matchbook AI's Data Hub creates a true data crosswalk giving secure access to varying business units across the enterprise so they can extract both strategic and tactical business insights for informed decision-making.

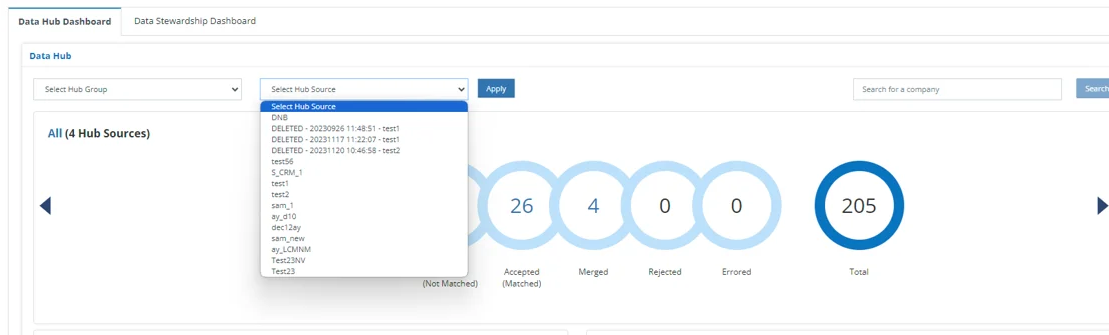
Data Hub facts at a glance

Datahub Dashboard:

- Datahub featureset includes a dashboard that provides high level visibility into datahub data. Charts are based off of industry codes.

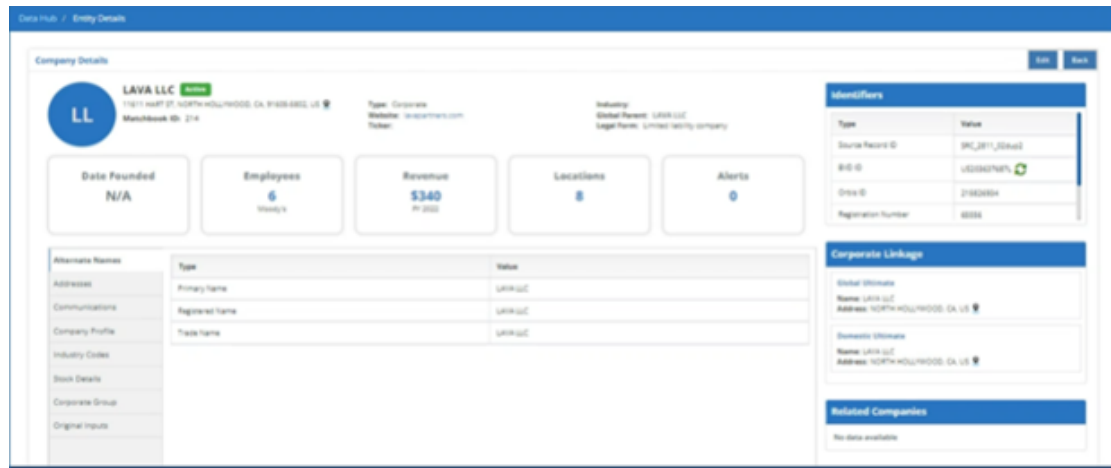


- The Datahub dashboard now contains all hub sources.



Datahub Entity Details:

- Users can now rematch a record when it has been incorrectly associated with a Third-Party Identifier.
- Users have the capability to edit the name and address in the company details page.
- The entity details page has been enhanced.



- Company identifiers are displayed on the right top corner of the Company details page.
- Duplicate companies are now identified from the same Hub Sources on the Entity Details page.
- On the left-hand side of the Entity Details page, company profile details will now be displayed in more detail.
- Related companies are now displayed on the right-hand side of Entity Details page when the Global Parent is identical between different companies.
- Corporate linkage will now be displayed with the Global and Domestic Ultimate details on the right side of the Entity Details page.
- Duplicate companies now identified from different Hub Sources on the Entity Details page.

Datahub Entity Stewardship:

- Data Hub Entity Stewardship allows for the review and deduplication of records from a single Source Tag. The user can now see duplicate companies from the Company Details page and the user can now see particular duplicate company details by clicking on Matchbook ID.
- Users can now rematch a record when it has been incorrectly associated with a Third-Party Identifier.
- The match percentage for any potential duplicate record has been added.

Datahub Hierarchy Management:

- The "Manage Family Tree" feature has been relocated to the "Data Hub" feature and renamed "Hierarchy Management." Its UI and functionality have not been changed.

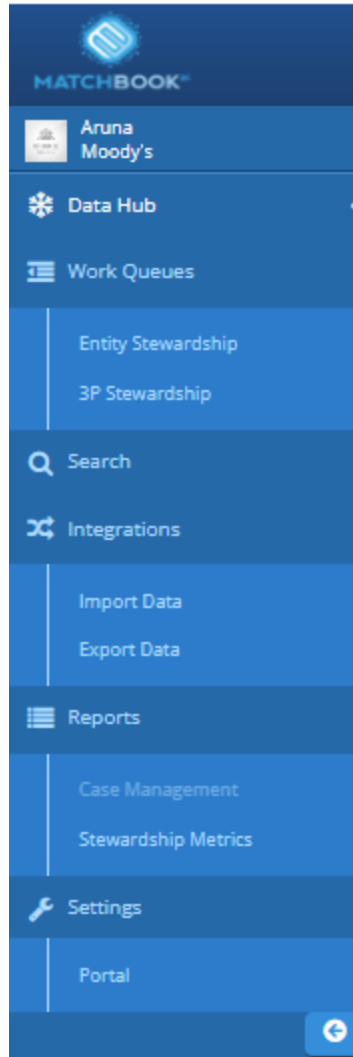
Datahub Import Data

- The Data Hub Import feature allows users to import data for various entity types including businesses, people, and places.

Moody's Integration

Export Features:

- Export features in the Datahub UI have been enhanced. A primary feature with datahub is having Moody's as a data provider.
- The Moody's Datahub left side menu navigation has been updated.



Master Data Management

Master Record:

- A user can now create a master record by merging two records.

Merge Entities:

- Users can merge entities in the Entity Mastering screen for Duplicate records.

Data Hub / Entity Details / Duplicate Companies / Merge

Comparison

Current Entity
Matchbook Id : 203

Source Information

Source Record Id: SRC_612_11
Source Name: NKTest_07Nov
Group Name: NKTest_7Nov

Addresses

144C COMMUNITY COLLEGE RD, AHOSKIE, NC, 27910-8047, US (Primary Address)
 144C COMMUNITY COLLEGE RD, AHOSKIE, NC, 27910-8047, US (Registered Address)

Names

DETOX (Primary Name)
 DETOX (Registered Name)

Matching Entity
Matchbook Id : 214

Source Information

Source Record Id: SRC_2811_02dup2
Source Name: NKTest_09Nov
Group Name: NKTest_09Nov

Addresses

11611 HART ST, NORTH HOLLYWOOD, CA, 91605-5802, US (Primary Address)
 11611 HART ST, NORTH HOLLYWOOD, CA, 91605-5802, US (Registered Address)

Names

LAVA LLC (Primary Name)
 LAVA LLC (Registered Name)

Master Entity Preview
Matchbook Id : 214

Source Information

Source Record Id: SRC_2811_02dup2, SRC_612_11
Source Name: NKTest_09Nov
Group Name: NKTest_09Nov

Addresses

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Potential Duplicates

- Users can merge entities in the Entity Mastering screen for Potential Duplicate records.

Data Hub / Entity Details / Duplicate Companies / Merge

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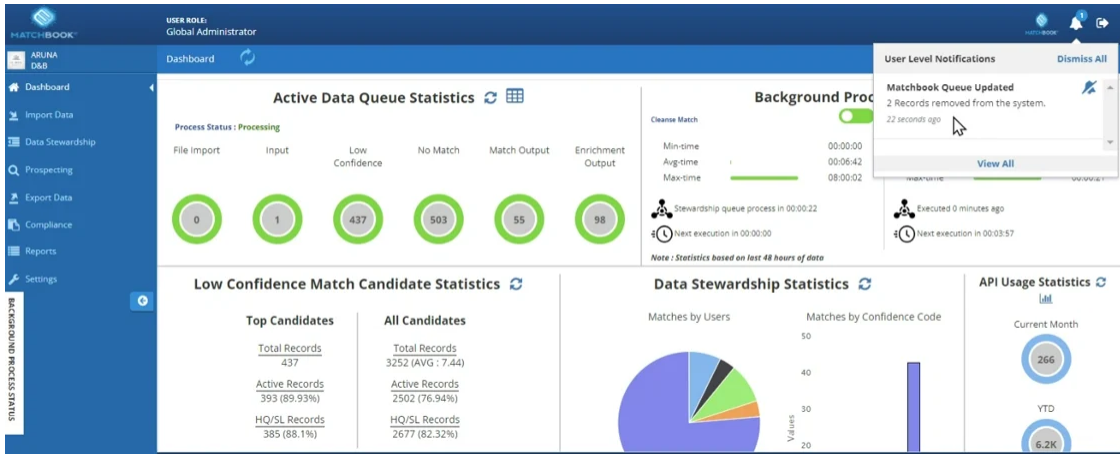
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General Updates

- Purge Functionality** - Purge functionality has been updated in the LCM and No Match queue.
- Exclusion Rule** - Previously, when a user selected the Exclusion rule, the data would land in the No Match queue and an error message would display as "Invalid parameters". This is now fixed.
- Additional Action** - When a record with Domain/Duns/Email/Registration Number in the No match queue is searched, users can now search by company using the Additional Actions button.
- File Matching** - Imported files containing the Netherlands as a country now work as expected.
- Un-match Records** - When a user un-matches a record now, the record will remain unmatched.
- Delete Notification** - The correct notification message when a file or tag is deleted will now be displayed.



- **Address Standardization** - Integrated AI parsing algorithm to support poorly formatted input addresses.
- Standard name and standard address will no longer be duplicated. Matchbook AI has their own proprietary capabilities for standardizing address records.



Matchbook AI, 400 Continental Blvd, 6th Floor, El Segundo, CA 90245
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