



# *Paribus 365<sup>TM</sup>*

*for Microsoft Dynamics 365*

Product Tour

[www.Paribus365.com](http://www.Paribus365.com)



### Paribus Intelligent Search

Explore the power of Paribus Search



### Paribus Duplicate Prevention

Explore the prevention of duplicate data



### Paribus Duplicate Detection & Merge

Explore how to detect & merge duplicates



### Paribus Cleanse, Merge & Consolidation

Discover, review and bulk merge duplicates



### Paribus Lead Management

Enhance Lead management with Paribus



### Paribus Smart Lookup Support

Replace CRM lookups with Paribus Search



### Paribus 365™ Match Engine

The power behind the Paribus Cloud

## Welcome to the Paribus 365™

### Product Tour

Explore Paribus' proven core principles for data quality management and see how Paribus is revolutionizing the way Dynamics users manage their data.

See how the Paribus search capabilities enable users to quickly find information in Dynamics and avoid adding in costly duplicates.

Embrace the power of the Paribus data quality firewall inside of Dynamics to pro-actively identify potential duplicates.

Harness the Paribus duplicate detection and data cleansing capabilities to provide a **Single Customer View (SCV)**, and to always ensure you are working with the correct version of the truth.

Making Data Quality Everyone's Mission

# Find It - Trust It - Engage it

Paribus 365™

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The screenshot shows the Paribus 365™ interface within a Microsoft Dynamics 365 environment. The top navigation bar includes the Paribus logo, the text 'Paribus (UCI)', and a 'Main' button. The left sidebar contains a navigation menu with categories like 'My Work', 'Customers', 'Marketing', and 'Service'. The main content area displays a 'Search Profile' for 'General Search' with a 'Search' button and a progress indicator. Below the search bar, a list of search results is visible, including entries for 'Paribus 365™ General Search', 'Detailed Address Search', and 'Paribus 365™ General Search'.

## About Paribus Intelligent Search

At the heart of Paribus 365™ is our Intelligent Search engine, providing a sophisticated fuzzy search capability. Performing searches using Paribus 365™ is like having your favorite internet search engine right inside of your CRM, searching across multiple entities in a single search.

With Paribus intelligent fuzzy matching you can always find what you are looking for, even if you do not spell it correctly, or know the exact name of the person or company.

The following section outlines the Paribus intelligent search features within Microsoft Dynamics 365.





The screenshot displays the Paribus 365 interface within a Microsoft Dynamics 365 application. The left sidebar shows the navigation menu with 'Customer Search' highlighted and numbered '1'. The main content area is titled 'Paribus 365™' and 'Intelligent Searching for Microsoft Dynamics 365'. It features a 'Search Profile' dropdown set to 'General Search' and a 'Search' button. Below this, there are input fields for 'Person Name' (Bob Dixon), 'Account Name' (Communications), and 'Address/Location'. A 'Detailed Address Search' section includes fields for 'Street Address', 'City', 'State or Province', 'Postal Code', and 'Country'. The search results are displayed in a table with three columns: 'Contact', 'Go To', and 'Review'. The results show three contacts: Robert Dixon (97% likeness), Bob Dickson (96% likeness), and Robert Dickson (96% likeness). Each contact entry includes a profile picture, name, title, company, address, and a likeness percentage.

Contact	Go To	Review
<b>Robert Dixon</b> 1st Network Communications 5010 Lincoln Drive Ft Myers, Florida 33534 US ≈ 97%		
<b>Bob Dickson</b> Marketing Manager 1st Network Communications 123 Maple Ave Los Angeles, CA 92653-1649 United States ≈ 96%		
<b>Robert Dickson</b> IT Support 1st Communications & Networks 12 Web Street Orlando, FL 23114 US ≈ 96%		

## Embedded Paribus Search

- 1 The Paribus search engine is seamlessly embedded within each of your Dynamics 365 applications, providing intelligent search capabilities right within the application.





The screenshot displays the Paribus 365™ web application interface. The top navigation bar includes the Paribus logo, the text 'Paribus (UCI)', and a 'Main' dropdown menu. The left sidebar contains a navigation menu with options like Home, Recent, Pinned, My Work, Dashboards, Activities, Customers, Customer Search, Accounts, Contacts, Social Profiles, Marketing, Opportunities, Enquiries, and Service. The main content area is titled 'Paribus 365™' and 'Intelligent Searching for Microsoft Dynamics 365'. It features a 'Search Profile' section with a 'General Search' dropdown and a 'Search' button. Below this is a 'Detailed Address Search' section with input fields for Street Address, City, State or Province, Postal Code, and Country. The search results are displayed in a table with three columns: Contact, Go To, and Review. The results show three contacts: Robert Dixon, Bob Dickson, and Robert Dickson, each with a 'Go To' button, a 'Review' button, and a similarity score (97%, 96%, and 96% respectively). A green box highlights the 'General Search' section and the first result, Robert Dixon.

1 - Paribus 365™ General Search

Person Name: Bob Dixon  
Account Name: Communications  
Address/Location:

- Detailed Address Search

Street Address:  
City:  
State or Province:  
Postal Code:  
Country:

Paribus 365™ Search Results - CRM Contacts (80% Likeness)

3 CRM Contacts | 1 CRM Lead (Person) | 20 CRM Accounts | 2 CRM Lead Companies

Contact	Go To	Review
<b>Robert Dixon</b> 1st Network Communications 5010 Lincoln Drive Ft Myers, Florida 33534 US ~ 97%		
<b>Bob Dickson</b> Marketing Manager 123 Maple Ave Los Angeles, CA 92653-1649 United States ~ 96%		
<b>Robert Dickson</b> IT Support 12 Web Street Orlando, FL 32814 US ~ 96%		

## Embedded Paribus Search

- 1 Perform searches using as much or as little information as is known, and have Paribus intelligently search to find matching results.





The screenshot displays the Paribus 365™ web application interface. The top navigation bar includes the Paribus logo, the text 'Paribus (UCI)', and a 'Main' dropdown menu. On the right side of the top bar are icons for search, share, help, and settings, along with a user profile icon labeled 'Paribus'. A left-hand sidebar contains a menu with options: Home, Recent, Pinned, My Work (Dashboards, Activities), Customers (Customer Search, Accounts, Contacts, Social Profiles), Marketing (Opportunities, Enquiries), and Service (Cases, Queues, Main). The main content area is titled 'Paribus 365™' and 'Intelligent Searching for Microsoft Dynamics 365'. It features a 'Search Profile' dropdown set to 'General Search' and a 'Search' button. Below this, there are two search sections: 'Paribus 365™ General Search' with input fields for Person Name (Bob Dixon), Account Name (Communications), and Address/Location; and 'Detailed Address Search' with input fields for Street Address, City, State or Province, Postal Code, and Country. A progress bar indicates a search status of 60% to 100%. A green box labeled '1' highlights the search results section, which shows 'Paribus 365™ Search Results - CRM Contacts (80% Likeness)' and a summary of '3 CRM Contacts | 1 CRM Lead (Person) | 20 CRM Accounts | 2 CRM Lead Companies'. Below the summary, three contact cards are displayed, each with a 'Go To' and 'Review' link. The first card is for 'Robert Dixon' with a 97% likeness score. The second card is for 'Bob Dickson' with a 96% likeness score. The third card is for 'Robert Dickson' with a 96% likeness score. Each card includes a company logo and address details.

## Paribus Multi-Entity Searches

- 1 Paribus is able to search across multiple Dynamics 365 entities in one single search, and presents a collective set of search results as clickable links.





**Paribus 365™** Intelligent Searching for Microsoft Dynamics 365

Search Profile: General Search

**- Paribus 365™ General Search**

Person Name: Bob Dixon  
Account Name: Communications  
Address/Location:

**- Detailed Address Search**

Street Address:  
City:  
State or Province:  
Postal Code:  
Country:

**Paribus 365™ Search Results** - CRM Contacts (80% Likeness)

3 CRM Contacts | 1 CRM Lead (Person) | 20 CRM Accounts | 2 CRM Lead Companies

Contact	Go To	Review
<b>Robert Dixon</b> 1st Network Communications 5010 Lincoln Drive Ft Myers, Florida 33554 US ~ 97%		
<b>Bob Dickson</b> Marketing Manager 1st Network Communications 123 Maple Ave Los Angeles, CA 92653-1649 United States ~ 96%		
<b>Robert Dickson</b> IT Support 1st Communications & Networks 12 Web Street Orlando, FL 23114 US ~ 96%		

## Paribus Search Results

1 Clicking upon any of the Paribus search result links will show the respective set of search results.

2 The sensitivity of the Paribus matches found can also be adjusted to show more or less results based upon their match score.





Paribus 365™ Search Results - CRM Contacts (80% Likeness) ↑ ⚙

[3 CRM Contacts](#) | [1 CRM Lead \(Person\)](#) | [20 CRM Accounts](#) | [2 CRM Lead Companies](#)

**Contact** Go To Review

**Robert Dixon**

[1st Network Communications](#)  
5010 Lincoln Drive  
Ft Myers, Florida  
55354  
US

≈ 97%

**Contact** Go To Review

**Bob Dickson**  
Marketing Manager  
[1st Network Communications](#)  
123 Maple Ave  
Los Angeles, CA  
92653-1649  
United States

≈ 96%

**Contact** Go To Review

**Robert Dicksen**  
IT Support  
[1st Communications & Networks](#)  
12 Web Street  
Orlando, FL  
23114  
US

≈ 96%

Total Results: 3

Paribus 365™ Search Results - CRM Contacts (80% Likeness) ↑ ⚙

[3 CRM Contacts](#) | [1 CRM Lead \(Person\)](#) | [20 CRM Accounts](#) | [2 CRM Lead Companies](#)

Name	Job Title	Account	Address/Location	≈ Likeness	Actions
Robert Dixon		<a href="#">1st Network Communications</a>	5010 Lincoln Drive, Ft Myers, Florida, 55354, US	97%	<a href="#">Go To</a> <a href="#">Review</a>
Bob Dickson	Marketing Manager	<a href="#">1st Network Communications</a>	123 Maple Ave, Los Angeles, CA, 92653-1649, United States	96%	<a href="#">Go To</a> <a href="#">Review</a>
Robert Dicksen	IT Support	<a href="#">1st Communications &amp; Networks</a>	12 Web Street, Orlando, FL, 23114, US	96%	<a href="#">Go To</a> <a href="#">Review</a>

Total Results: 3

## Paribus Search Result Styles

Paribus provides a collection of display styles by which to show Paribus search results.




Each of these display styles can be defined to contain custom content and relative actions.






Paribus 365™ Search Results - CRM Contacts (80% Likeness)

3 CRM Contacts | 1 CRM Lead (Person) | 20 CRM Accounts | 2 CRM Lead Companies

Contact	Go To	Review
 <b>Robert Dixon</b> <a href="#">1st Network Communications</a> 5010 Lincoln Drive Ft Myers, Florida 55354 US ≈ 97%		
 <b>Bob Dickson</b> Marketing Manager <a href="#">1st Network Communications</a> 123 Maple Ave Los Angeles, CA 92653-1649 United States ≈ 96%		
 <b>Robert Dickson</b> IT Support <a href="#">1st Communications &amp; Networks</a> 12 Web Street Orlando, FL 23114 US ≈ 96%		

Total Results: 3

Contact Go To Review

 **Bob Dickson**  
Marketing Manager  
[1st Network Communications](#)  
123 Maple Ave  
Los Angeles, CA  
92653-1649  
United States  
≈ 96%

## Paribus Search Result - Match Scoring











1 Each Paribus search result is automatically awarded a match score, denoting a percentage of likeness to the search criteria used to find it.

Paribus match results are shown/ranked in their match score order of likeness.





## Paribus 365™ Search Results - Associated Contacts

							1	Actions		
Name	Job Title	Account	≈ Likeness							
 Bob Dickson		<a href="#">First Networks</a>	99%					<a href="#">Associate</a>	<a href="#">Go To</a>	<a href="#">Review</a>
 Bobby Dixon		<a href="#">Network 1st Ltd</a>	97%					<a href="#">Associate</a>	<a href="#">Go To</a>	<a href="#">Review</a>
 Robert Dicksen	IT Support	<a href="#">1st Communications &amp; Networks</a>	97%					<a href="#">Associate</a>	<a href="#">Go To</a>	<a href="#">Review</a>
 Bob Dickson	Marketing Manager	<a href="#">1st Network Communications</a>	96%					<a href="#">Associate</a>	<a href="#">Go To</a>	<a href="#">Review</a>
 Robert Dixon		<a href="#">1st Network Communications</a>	96%					<a href="#">Associate</a>	<a href="#">Go To</a>	<a href="#">Review</a>

## Paribus Search Results – Take Action

1

Each Paribus match result provides a collection of actions which can be performed in context to the search operation.



**About Paribus Duplicate Prevention**

We know that without appropriate data quality safeguards and policies in place just how vulnerable your Dynamics 365 system can be. With Paribus Duplicate Prevention, your Dynamics system is automatically protected by our data quality firewall, enforcing data governance and safeguarding users from adding in costly duplicates.

Paribus 365™ actively prevents the creation of duplicate data by automatically alerting users when they are about to add an Account, Contact or Lead that already exists within CRM.

The following section outlines the Paribus 365™ duplicate prevention features within Microsoft Dynamics 365.





The screenshot shows the Paribus 365 CRM interface. The left sidebar contains navigation options: Home, Recent, Pinned, My Work, Dashboards, Activities, Customers, Customer Search, Accounts, Contacts (selected), Social Profiles, Marketing, Opportunities, Enquiries, and Service. The main content area is titled 'New Contact' and has tabs for Summary, Paribus Duplicate Prevention (highlighted with a green box and a green '1'), Enquiries, and Details. The 'Paribus Duplicate Prevention' tab displays a message: 'Paribus is here to assist you when adding a new Contact and to ensure that you do not potentially add a duplicate. Enter the basic details of the new Contact you wish to add and have Paribus check for any existing Contacts which may exist. Any potential duplicates found will be listed in the results above, if no duplicates are detected then this information will be populated into the Contact summary to continue your new Contact entry.' Below this message are two sections: 'New CRM Contact Details' with fields for First Name (Robert), Last Name (Dixon), Account Name (First Communications), and Email Address; and 'New CRM Contact Address (optional)' with fields for Street Address, City, State or Province, Postal Code, and Country. A 'Check Existing' button is located to the right of the 'New CRM Contact Details' section. The top of the interface shows the Paribus (UCI) header and a search bar.

## Paribus Duplicate Prevention

1 When adding new data into Dynamics 365 (e.g. Accounts, Contacts or Leads), Paribus will automatically present the "Paribus Duplicate Prevention" tab to request the information you wish to add.





The screenshot shows the Paribus 365 web application interface. The top navigation bar includes the Paribus logo, the text 'Paribus (UCI)', and a 'Main' dropdown menu. A left sidebar contains navigation links for Home, Recent, Pinned, My Work, Dashboards, Activities, Customers, Customer Search, Accounts, Contacts (selected), Social Profiles, Marketing, Opportunities, and Enquiries. The main content area is titled 'Contact: Contact' and 'New Contact'. It features tabs for Summary, Paribus Duplicate Prevention (active), Enquiries, and Details. A Paribus 365 banner is present. Below it, a 'Paribus Duplicate Prevention' information box explains the system's purpose. A form section labeled '1 - New CRM Contact Details' contains fields for First Name (Robert), Last Name (Dixon), Account Name (First Communications), and Email Address. A '2' is placed next to a 'Check Existing' button. Below this is a section for 'New CRM Contact Address (optional)' with fields for Street Address, City, and State or Province. The bottom status bar shows 'unsaved changes' and a 'Save' button.

## Paribus Duplicate Prevention Search

- 1 On the "Paribus Duplicate Prevention" tab, enter the basic information about the entity to be added.
- 2 Clicking the "Check Existing" has Paribus perform a complete check across multiple business entities for any possible duplicates.



Paribus (UCI) Main >

Save Save & Close + New QGate Learn

Contact: Contact ▾  
New Contact

Summary **Paribus Duplicate Prevention** Enquiries Details

**Paribus** 1 | 3 possible duplicate Contacts | 1 possible duplicate Lead | 3 possible related Accounts 🔍

**Paribus 365™ Search Results - Possible Duplicate Contacts**

**Potential Duplicate Contacts**  
Warning! - The following Contacts may be potential duplicates to the Contact you wish to add?

Name	Job Title	Account	Address/Location	≈ Likeness	Actions
Robert Dixon		<a href="#">1st Network Communications</a>	5010 Lincoln Drive, Ft Myers, Florida, 55354, US	98%	<a href="#">Go To</a> <a href="#">Review</a>
Robert Dickson	IT Support	<a href="#">1st Communications &amp; Networks</a>	12 Web Street, Orlando, FL, 23114, US	98%	<a href="#">Go To</a> <a href="#">Review</a>
Bob Dickson	Marketing Manager	<a href="#">1st Network Communications</a>	123 Maple Ave, Los Angeles, CA, 92653-1649, United States	97%	<a href="#">Go To</a> <a href="#">Review</a>

## Paribus Duplicate Prevention Results

1 Following the Paribus duplicate prevention search, any potential duplicates will be listed in the notification area.

2 Action may be taken to review any of the suggested duplicates, including navigation to the intended business entity and avoid duplicate entry.



The screenshot shows the Paribus 365 interface. At the top, there's a navigation bar with 'Paribus (UCI)' and 'Main >'. Below this is a sidebar with navigation options like Home, Recent, Pinned, My Work, Dashboards, Activities, Customers, Customer Search, Accounts, Contacts, Social Profiles, and Marketing. The main content area is titled 'New Contact' and shows a 'Summary' tab selected. Below the summary, there's a section titled 'Paribus 365™ Search Results - Possible Related Accounts'. This section displays a table of potential associated accounts with columns for Account, Address/Location, Likeness, and Actions. The table lists three accounts: '1st Communications & Networks', '1st Network Communications', and 'Communication First'. Each account has a 97% likeness score and an 'Associate' button. A green box labeled '1' highlights the search results header, and another green box labeled '2' highlights the 'Associate' button for the first account.

Account	Address/Location	≈ Likeness	Actions
1st Communications & Networks	, Tunbridge Well, United Kingdom	97%	Associate Go To Review
1st Network Communications	123 Maple Ave, Los Angeles, CA, 92653-1649, United States	97%	Associate Go To Review
Communication First	Winchester Road, Southampton, Hampshire, UK	97%	Associate Go To Review

## Paribus Duplicate Prevention - Association

During the process of adding a new entity (e.g. Contact), the new Contact may not be a duplicate, however, the associated Account may already exist.

1 Selecting the Paribus related Accounts list will provide a set of intelligently matched Accounts.

2 Any of these related Accounts may be selected and 'Associated' to the new Contact being added.



Paribus (UCI) Main >

Save Save & Close + New QGate Learn

Contact: Contact ▾  
**New Contact**

**Summary** Paribus Duplicate Prevention Enquiries Details

**CONTACT INFORMATION**

First Name  
**Robert**

Last Name  
**Dixon**

Account Name  
**1st Communications & Networks**

Job Title

**Timeline**

This record hasn't been created yet. To view this record, save it to your timeline.

**Company**

**1st Communications & Networks**

unsaved changes Save

## Paribus Duplicate Prevention – New Data Entry

If the Paribus duplicate prevention process did not find any related duplicates, standard data entry can resume.

1 Any information gathered by Paribus to check for duplicates will be automatically presented on the Dynamics 365 detail form content (no double entry required).

2 Any Account associations made with Paribus will also be automatically set for the new Contact.





**About Paribus Duplicate Detection & Merge**

When engaging with business entities in Dynamics 365, it is vitally important for users to know if that entity has any potential duplication and to ensure they are always working with the single version of the truth.

Paribus 365™ Duplicate Detection & Merge plays an active role to provide users with valuable insight of any potential conflicting duplication, before they engage with a given entity. This makes it easy for users to cross review each conflict and to establish a Single Customer View (SCV).

The following section outlines the Paribus 365™ duplicate detection & merge features within Microsoft Dynamics 365.

**Contact: Bob Dickson**  
Summary | Paribus Duplicate Detection | Enquiries | Details | Related

bob.dickson@fnc.com  
Business Phone  
(555) 123-9999

No data available.





Paribus (UCI) Main >

Paribus found 7 possible duplicates. Please see the Paribus Duplicate Detection tab for more details.

Create Enquiry + New Deactivate Connect Add to Marketing List Assign Email a Link Delete Refresh Process

Contact: Contact  
BD Bob Dickson

Summary Paribus Duplicate Detection Enquiries Details Related

1 Paribus Duplicate Detection  
7 possible duplicates detected [Manage Duplicates](#)

CONTACT INFORMATION

First Name  
Bob

Last Name  
Dickson

Job Title  
Marketing Manager

Account Name

1st Network Communications

Email  
bob.dickson@fnc.com

Timeline

Enter a note...

OLDER

Auto-post on wall Bob Dickson - 6/8/2018 10:24 AM  
Contact: Created By QGate Software.

Like Reply

Company  
Network

RECENT OPPORTUNITIES  
No data available.

RECENT CASES  
No data available.

Save

## Paribus Duplicate Detection

- 1 Paribus' duplicate detection is seamlessly embedded into Dynamics 365 detail forms to proactively warn of any possible duplicates.
- 2 A warning of potential duplicates can also be shown as a notification bar.





Paribus (UCI) Main >

Create Enquiry + New Deactivate Connect Add to Marketing List Assign Email a Link Delete Refresh

Contact: Contact  
RD Robert Dixon

Summary **Paribus Duplicate Detection** Enquiries Details Related

Paribus 365™ Search

Paribus Duplicate Detection  
Paribus has used the following information from the Contact you are working with to detect potential duplicates.

1 - CRM Contact Information

First Name Robert Last Name Dixon

Account/Company Name 1st Network Communications

Address/Location

Email Address

2 | 4 possible duplicate Contacts | 3 possible duplicate Leads

Check for Duplicates

## "Paribus Duplicate Detection" Tab

Paribus' duplicate detection support is provided upon a tab within the Dynamics 365 detail form.

- 1 Paribus uses information from the current business entity to automatically search for potential duplicates.
- 2 Any potential duplicates detected are automatically displayed as clickable notifications.



The screenshot shows the Paribus (UCI) interface. The top navigation bar includes a search icon, a plus icon, a filter icon, a settings icon, and a help icon. The main header shows 'Paribus (UCI)' and 'Main >'. The left sidebar contains navigation links: Home, Recent, Pinned, My Work, Dashboards, Activities, Customers, Customer Search, Accounts, Contacts, Social Profiles, Marketing, Opportunities, and Enquiries. The main content area displays the 'Paribus Duplicate Detection' results for contact Robert Dixon. A warning message states: 'Warning! - Paribus has detected the following Contacts as potential duplicates to the Contact you are currently working with.' Below this, a table lists four potential duplicate contacts, sorted by likeness percentage. The table has columns for Name, Job Title, Account, Address/Location, Likeness, and Actions. The actions column includes 'Go To', 'Review', and 'Merge' links. A green box highlights the '4 possible duplicate Contacts' link in the top right of the results section. Another green box highlights the table of results.

Name	Job Title	Account	Address/Location	≈ Likeness	Actions
Bobby Dixon		Network 1st Ltd	, Tampa, FL	97%	<a href="#">Go To</a> <a href="#">Review</a> <a href="#">Merge</a>
Bob Dickson	Marketing Manager	1st Network Communications	123 Maple Ave, Los Angeles, CA, 92653-1649, United States	96%	<a href="#">Go To</a> <a href="#">Review</a> <a href="#">Merge</a>
Bob Dickson		First Networks	5010 Lincoln Dr, Tampa, FL, 33802, USA	94%	<a href="#">Go To</a> <a href="#">Review</a> <a href="#">Merge</a>
Robert Dickson	IT Support	1st Communications & Networks	12 Web Street, Orlando, FL, 23114, US	93%	<a href="#">Go To</a> <a href="#">Review</a> <a href="#">Merge</a>

## Paribus Duplicate Detection - Results

- 1 Selecting one of the Paribus duplicate detection links will show those possible duplicate search results.
- 2 Paribus' match results show possible duplicates in order of their closest likeness.





Paribus (UCI) Main >

Create Enquiry + New Deactivate Connect Add to Marketing List Assign Email a Link Delete Refresh

Home Recent Pinned My Work Dashboards Activities Customers Customer Search Accounts Contacts Social Profiles Marketing Opportunities

Summary

3 possible duplicate Leads

≈ Likeness	Go To	Review	1 Merge
97%	Go To	Review	Merge
96%	Go To	Review	Merge
94%	Go To	Review	Merge
93%	Go To	Review	Merge

OK Cancel

## Paribus Duplicate Detection - Merge

1 Any of these potential duplicate Contacts may be 'Merged' into the current, primary Contact.\*

2 Clicking Merge will open a dialog to confirm details before merging with the primary Contact record.

\*(user permissions-dependent).





## About Paribus Data Cleanse, Bulk Merge and Consolidation

Achieving duplicate-free data should be a key goal of any data quality strategy. However, despite best endeavors, this can be marred by endless challenges which fail to achieve a truly merged customer view.

Paribus 365™ Data Cleansing provides capabilities to search across your entire Dynamics 365 system to identify large-scale data duplication, empowering your data analysts with valuable insight on data quality.

Once identified, duplicates can be reviewed and approved before easily merging and consolidating into a single master golden record and Single Customer View (SCV).

The following section outlines the Paribus 365™ data cleansing features for achieving duplicate-free data within Microsoft Dynamics 365.



## Step 1

### Define Paribus Data Matching Criteria

The Paribus 365™ Data Cleansing process is achieved in three simple steps.

The first of which being to easily define the matching criteria by which to identify duplicates within Dynamics 365.

## Paribus Duplicate Data Matching

- ❖ Search for mass duplicates within Dynamics
- ❖ Match duplicates using multiple fuzzy match criteria
- ❖ Set each match criteria to a given match score threshold
- ❖ Match upon any entity data items including custom data
- ❖ Filter the Paribus matching process to only match upon sub-sets of data
- ❖ Match upon both one-to-one and one-to-many data items





## Step 2

### Review Paribus Matching Results

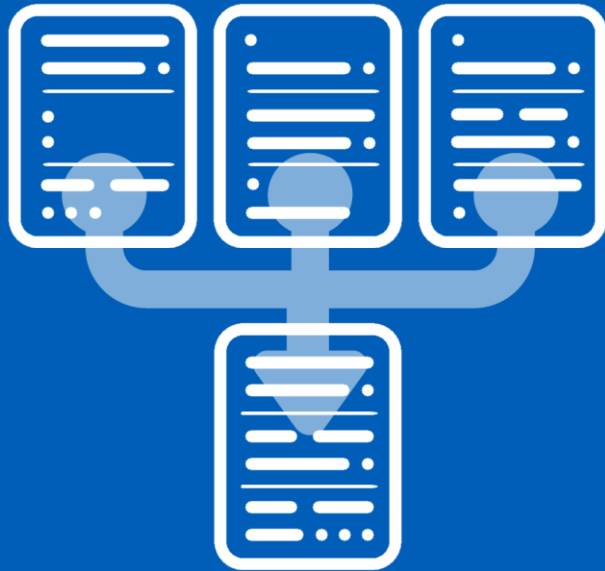
Once Paribus has identified duplicates within Dynamics, the Paribus 365™ Data Cleansing process provides the ability to review the results before merging.

This important element of the process confirms your approval and always ensures you remain in total control of your data.

## Paribus Duplicate Data Review

- ❖ Review duplicates side-by-side to ensure they are valid duplicates
- ❖ View multiple data items (including custom data) to assist side-by-side comparison
- ❖ Allows for mass review and approval of duplicates
- ❖ Include/exclude duplicates from results and merge processing
- ❖ Promote selective entities to become the surviving master entity (post the merge)





## Step 3

### Merge and Consolidate Duplicates

Once the identified duplicates have been reviewed and approved, the Paribus duplicate merge process can be used to merge and consolidate Dynamics entities.

This automated merge process removes the need for tedious, user intervention and likely possible human error.

## Paribus Data Merging Capabilities

- ❖ Merge duplicate Dynamics entities
- ❖ Consolidate all associated data
- ❖ Achieve a single surviving master golden record (Single Customer View)
- ❖ Remove or hide (deactivate) duplicate entities
- ❖ Save precious time automatically merging duplicates on-mass
- ❖ Support for custom data merge processing and analysis
- ❖ Merge processing achieved using Dynamics non-interactive user (higher daily transaction/API limits)





## About Paribus Lead Management

Efficient and effective Lead management is essential to providing a clear insight of business opportunities and monitor progress with new prospects and existing customers.

Paribus 365™ Lead Management provides valuable insight during the Lead qualification and engagement process to automatically highlight existing customers (Single Customer View - SCV).

By proactively associating Leads with existing customers, Paribus greatly assists qualification, avoids duplicate conflict and prevents embarrassing and misguided interaction with customers.

The following section outlines the Paribus Lead management features within Microsoft Dynamics 365.





The screenshot displays the Paribus Lead Management interface. The top navigation bar includes the Paribus logo, the text 'Paribus (UCI)', and a 'Main' dropdown. The left sidebar contains navigation options: Home, Recent, Pinned, My Work (Dashboards, Activities), Customers (Customer Search, Accounts, Contacts, Social Profiles), Marketing (Opportunities, Enquiries), and Service (Cases). The main content area shows a lead profile for 'Rob Dickson' with a 'Summary' tab selected. A green box highlights the 'Paribus Lead Qualification' tab. The 'Contact' section lists details: Topic, First Name (Rob), Last Name (Dickson), Job Title (Marketing Manager), Business Phone, and Mobile Phone. The 'Timeline' section shows two auto-posts from QGate Software. The 'Stakeholders' section lists 'Bob Dickson' with a 'Stake' role. The 'Competitors' section shows 'No data available.'.

## Paribus Lead Management

1 When engaging with Leads in Dynamics 365, Paribus provides support to the qualification process by the presence of the "Paribus Lead Qualification" tab.





The screenshot displays the Paribus 365™ Lead Management interface. The top navigation bar includes the Paribus logo, the user name 'Paribus (UCI)', and a 'Main' dropdown. The left sidebar contains navigation links for Home, Recent, Pinned, My Work, Dashboards, Activities, Customers (Customer Search, Accounts, Contacts, Social Profiles), and Marketing (Opportunities). The main content area shows a lead profile for 'Rob Dickson' with an 'Enquiry Source' of '---' and a 'Rating' of 'Warm'. The 'Paribus Lead Qualification' tab is selected, showing a summary of the lead's qualification status. A green box highlights the 'Paribus Lead Qualification' tab. Below the summary, a green box highlights the text '1 possible duplicate Lead | 3 possible qualifying Contacts | 3 possible qualifying Accounts'. The 'Paribus 365™' section includes a 'Paribus Duplicate Detection/Lead Qualification' notification and a 'CRM Lead Contact Information' form with fields for Lead First Name, Lead Company Name, Address/Location, and Email Address. A 'Detailed Address Search' section is also visible.

## Paribus Lead Qualification

1 The "Paribus Lead Qualification" tab takes information about the Lead you are engaging with to automatically search across multiple business entities for any related parties.

2 Paribus shows the collection of related entities as clickable links.





The screenshot shows the Paribus Lead Management interface. The top navigation bar includes a search icon, a plus icon, a filter icon, a settings icon, and a help icon. The main header displays the Paribus logo and the text "Paribus (UCI)". The left sidebar contains navigation links for Home, Recent, Pinned, My Work, Dashboards, Activities, Customers, Customer Search, Accounts, Contacts, Social Profiles, Marketing, and Opportunities.

The main content area shows a lead profile for "Enquiry: Enquiry" and "Rob Dickson". The lead's "Enquiry Source" is "---" and the "Rating" is "Warm". Below the profile, there are tabs for "Summary", "Paribus Lead Qualification" (selected), "Details", and "Related".

The "Paribus Lead Qualification" tab displays a search results summary: "1 possible duplicate Lead", "3 possible qualifying Contacts", and "3 possible qualifying Accounts". Below this, a section titled "Paribus 365™ Search Results - Possible Duplicate Leads" contains a warning message: "Paribus Duplicate Detection: Warning! - Paribus has detected the following Leads as potential duplicates to the Lead you are currently working with."

Name	Job Title	Account	Address/Location	≈ Likeness	Actions
Bobby Dixon	Marketing Manager	1st Network Communications	, Boston, MA	97%	<a href="#">Go To</a> <a href="#">Review</a> <a href="#">Merge</a>

## Paribus Lead Qualification – Duplicate Detection

As part of the Paribus Lead Qualification process, it is vitally important to ensure that the Lead is not a duplicate to any other Lead.

- 1 Paribus will always perform this check to ensure that any Lead engagement is focused upon the single version of the truth (Single Customer View – SCV).





The screenshot displays the Paribus (UCI) interface. The top navigation bar includes a search icon, a plus icon, a filter icon, a settings icon, and a help icon. The main header shows the user's name 'Paribus' and a profile icon. The left sidebar contains navigation links for Home, Recent, Pinned, My Work, Dashboards, Activities, Customers, Customer Search, Accounts, Contacts, Social Profiles, and Marketing. The main content area shows a lead profile for 'Enquiry: Enquiry' by 'Rob Dickson' with a rating of 'Warm'. Below this, the 'Paribus Lead Qualification' tab is active, displaying search results for 'Possible Qualifying Contacts'. A summary bar at the top of the results shows '1 possible duplicate', '3 possible qualifying Contacts', and '3 possible qualifying Accounts'. A table lists three potential contacts: Bob Dickson, Robert Dixon, and Robert Dickson. Each row includes columns for Name, Job Title, Account, Address/Location, and Likeness. The 'Associate' button for each contact is highlighted with a green box. A green box also highlights the '3 possible qualifying Contacts' link in the summary bar.

Name	Job Title	Account	Address/Location	≈ Likeness	Actions
Bob Dickson	Marketing Manager	1st Network Communications	123 Maple Ave, Los Angeles, CA, 92653-1649, United States	98%	Associate Go To Review
Robert Dixon		1st Network Communications	5010 Lincoln Drive, Ft Myers, Florida, 55354, US	97%	Associate Go To Review
Robert Dickson	IT Support	1st Communications & Networks	12 Web Street, Orlando, FL, 23114, US	97%	Associate Go To Review

## Paribus Lead Qualification – Qualifying Parties

- 1 Paribus Lead Qualification provides references to qualifying parties (e.g. Accounts and Contacts) to easily allow the user to qualify the Lead against existing Dynamics business entities.
- 2 Selecting the qualifying entity with 'Associate' will qualify and associate the Lead to that related entity.





## About Paribus Smart Entity Lookups

Despite being a core feature of Microsoft Dynamics 365, entity Lookups do not contain any degree of fuzzy matching/searching. In fact, in cases where entities are not found, Dynamics Lookups will promote the creation of a new entity, which may likely be a duplicate.

Paribus 365™ Smart Entity Lookups provides an enhanced replacement with all the power of the Paribus fuzzy match engine, ensuring Dynamics users a safer alternative and allowing them to always establish the correct entity Lookup.

The following section outlines how Paribus 365™ can be used to replace standard lookups within Microsoft Dynamics 365.





The screenshot displays the Paribus 365™ user interface. The top navigation bar includes the Paribus logo, the text 'Paribus (UCI)', and a 'Main' dropdown menu. The left sidebar contains a navigation menu with categories: 'Home', 'Recent', 'Pinned', 'My Work', 'Customers', and 'Marketing'. The 'Marketing' section is expanded, showing 'Opportunities' as the selected item. The main content area shows the 'New Opportunity' form. The 'Paribus Entity Lookup' tab is highlighted with a green box and a green '1' in a square. The form includes fields for 'Est. Close Date' and 'Est. Revenue'. Below the tabs, there is a search bar with the text '5 possible associated Contacts' and '5 possible associated Accounts'. The search results show 'Paribus 365™' and 'Paribus Entity Lookup'. The search criteria are: 'Contact Name: Robert Dickson', 'Account Name: 1st Networks', and 'Filter by location: Address/Location'. A 'Search' button is visible.

## Paribus Smart Entity Lookups

1 Paribus smart entity lookup support is provided upon the "Paribus Entity Lookup" tab within the entity detail form (e.g. Opportunity).







## Paribus Smart Entity Lookups

- 1 In one single transaction, enter the details of the entity you wish to lookup (e.g. Account and Contact for new Opportunity) and perform a Paribus search.
- 2 A list of possible matches are then provided as Paribus match results.





Paribus (UCI) Main >

Save Save & Close + New

Opportunity: Opportunity  
New Opportunity

Est. Close Date --- Est. Revenue ---

Summary **Paribus Entity Lookup** Product line items Quotes Associated Enquiries

**Paribus** 1 | 5 possible associated Contacts 5 possible associated Accounts

**Paribus 365™ Search Results - Associated Contacts**

**Opportunity Associated Contacts**  
Select one of the following Contacts to associate to this Opportunity.

Name	Job Title	Account	Address/Location	Similarity	Actions
Bob Dickson		<a href="#">First Networks</a>	5010 Lincoln Dr, Tampa, FL, 33802, USA	99%	Associate Go To Review
Bobby Dixon		<a href="#">Network 1st Ltd</a>	, Tampa, FL	97%	Associate Go To Review
Robert Dickson	IT Support	<a href="#">1st Communications &amp; Networks</a>	12 Web Street, Orlando, FL, 23114, US	97%	Associate Go To Review
Bob Dickson	Marketing Manager	<a href="#">1st Network Communications</a>	123 Maple Ave, Los Angeles, CA, 92653-1649, United States	96%	Associate Go To Review
Robert Dixon		<a href="#">1st Network Communications</a>	5010 lincoln Drive, Ft Myers, Florida, 55354, US	96%	Associate Go To Review

## Paribus Smart Entity Lookups

- 1 Selecting the Paribus match results will display those business entities for review/selection.
- 2 The 'Associate' option provided for each of the Paribus match results will select that entity and place reference to it within the related CRM lookup.





## Paribus Smart Entity Lookups

- 1 Upon selecting an entity within the Paribus match results and performing 'Associate', this will set the entity association into the CRM lookup.
- 2 In addition to a single association, Paribus can also automatically associate related entities in one single operation (e.g. set related Account association from the selected Contact).





## Paribus 365™ Match Engine

The Paribus 365™ match engine is a cloud-based service, hosted within Microsoft Azure data centers, providing global coverage to the Microsoft Dynamics 365 business community.

The powerful capabilities of the Paribus Cloud Match Engine and its ability to search, find and compare data is based upon a collection of sophisticated matching algorithms – some of these capabilities are listed aside.

*Paribus 365™ together with Microsoft Dynamics 365, empowers Dynamics 365 users with better data quality and greater user efficiencies to provide the best in customer engagement.*

### Phonetic Data Matching

- ❖ Foto Centre, Photo Center
- ❖ Kris Dixon, Chris Dickson, Criss Dicksen
- ❖ Cheryl Wiatt, Sheryl Wyiatt, Sherril Wyatt

### Synonyms, Abbreviations and Acronyms

- ❖ Robert, Bob, Bobbie, Rob, Robbie, Roberto
- ❖ William, Will, Willy, Bill, Billy
- ❖ International Business Machines, IBM, I.B.M

### Data Sequence Variation

- ❖ Florida University, University of Florida
- ❖ Arizona 1<sup>st</sup> National Bank, First National Bank of Arizona
- ❖ 123 (Flat A) Acacia Avenue, Flat A – 123 Acacia Avenue

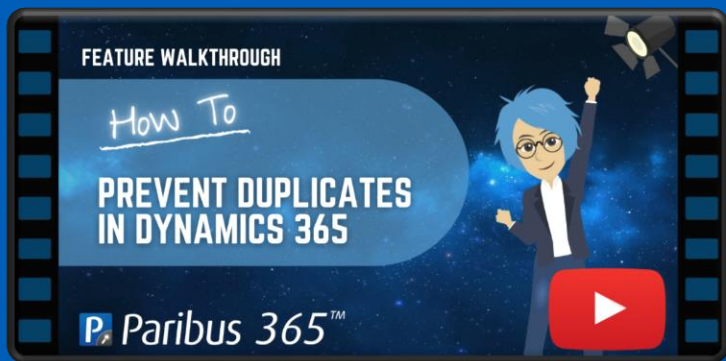
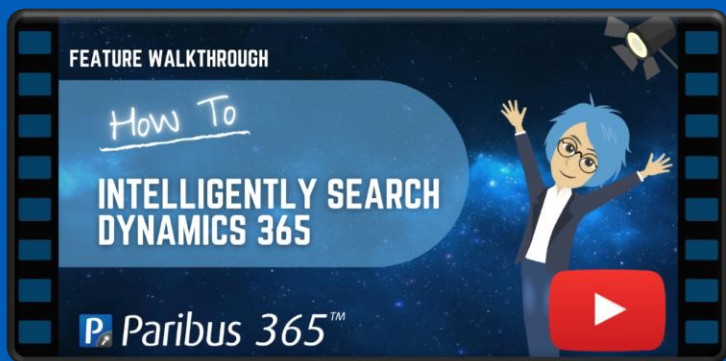
### Gender Analysis

- ❖ Paul v Paula
- ❖ Daniel v Danielle
- ❖ Jo v Joe
- ❖ Andy v Andie

### Data Segmentation

- ❖ QWARE, Q WARE, Q-WARE
- ❖ GuideMark, Guide Mark, Guide-Mark
- ❖ 3Com, 3 Com, 3-Com





## Paribus Product Walkthroughs

For a deeper insight into the capabilities of Paribus 365™ and to see many of its proven data quality features in action, be sure to watch each of our product walkthrough videos.





# *Paribus 365<sup>TM</sup>*

[www.Paribus365.com](http://www.Paribus365.com)

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