



Paribus 365TM

for Microsoft Dynamics 365

Product Tour

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 Intelligent Search interface within a Microsoft Dynamics 365 environment. The top navigation bar includes the Paribus logo, the user name 'Paribus (UCI)', and the page title 'Main'. The main header displays 'Paribus 365™' and 'Intelligent Searching for Microsoft Dynamics 365'. A search profile dropdown is set to 'General Search'. A search bar contains the text 'Paribus 365™ General Search'. Below the search bar, a search button and a progress indicator (60% to 100%) are visible. The left sidebar shows navigation options: Home, Recent, Pinned, My Work, Dashboards, Activities, Customers, Customer Search, Accounts, Contacts, Social Profiles, Marketing, Opportunities, Enquiries, Service, Cases, Queues, and Main. The main content area shows search results for 'Paribus 365™ General Search' with columns for Name, Role, and Location. A green callout box is overlaid on the search results, containing the title 'About Paribus Intelligent Search' and three paragraphs of text. The bottom status bar shows 'Total Results: 3'.



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.



Paribus (UCI) Main > Paribus 365™ Intelligent Searching for Microsoft Dynamics 365

Search Profile: General Search

- Paribus 365™ General Search

Person Name:

Account Name:

Address/Location:

- Detailed Address Search

Street Address:

City:

State or Province:

Postal Code:

Country:

Search

60% 100%

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%		
Bob Dickson Marketing Manager 1st Network Communications 123 Maple Ave Los Angeles, CA 92653-1649 United States ≈ 96%		
Robert Dickson 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™ interface within a Microsoft Dynamics 365 environment. The top navigation bar includes the Paribus logo, the user name 'Paribus (UCI)', and a 'Main' dropdown menu. The search profile is set to 'General Search'. A search form contains the following fields:

- Person Name: Bob Dixon
- Account Name: Communications
- Address/Location: (empty)

Below the search form is a 'Detailed Address Search' section with fields for Street Address, City, State or Province, Postal Code, and Country. The search results are displayed under the heading 'Paribus 365™ Search Results - CRM Contacts (80% Likeness)'. The results summary shows: 3 CRM Contacts, 1 CRM Lead (Person), 20 CRM Accounts, and 2 CRM Lead Companies. Three contact cards are visible:

Contact	Go To	Review	Likeness
Robert Dixon 1st Network Communications 5010 Lincoln Drive Ft Myers, Florida 55354 US			≈ 97%
Bob Dickson Marketing Manager 1st Network Communications 123 Maple Ave Los Angeles, CA 92653-1649 United States			≈ 96%
Robert Dickson IT Support 1st Communications & Networks 12 Web Street Orlando, FL 23114 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 shows the Paribus 365 search interface. The search profile is set to 'General Search'. The search results are categorized as 'CRM Contacts (80% Likeness)'. The results are displayed as a list of contact cards, each with a name, title, company, address, and a similarity score. A green box highlights the search results header and the first three contact cards.

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 Marketing Manager 1st Network Communications 5010 Lincoln Drive Ft Myers, Florida 33904 US ≈ 97%		
Bob Dickson Marketing Manager 1st Network Communications 123 Maple Ave Los Angeles, CA 92653-1649 United States ≈ 96%		
Robert Dickson IT Support 1st Communications & Networks 12 Web Street Orlando, FL 32814 US ≈ 96%		

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.



The screenshot displays the Paribus 365 search interface. The top navigation bar includes the Paribus logo, the user name 'Paribus (UCI)', and a 'Main' dropdown menu. The search profile is set to 'General Search'. The search results are categorized as 'CRM Contacts (80% Likeness)' and include 3 CRM Contacts, 1 CRM Lead (Person), 20 CRM Accounts, and 2 CRM Lead Companies. Three contact cards are visible, each with a match score: Robert Dixon (97%), Bob Dickson (96%), and Robert Dickson (96%). A search bar with a 'Search' button and a progress indicator is also shown.

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%
Bob Dickson Marketing Manager 1st Network Communications 123 Maple Ave Los Angeles, CA 92653-1649 United States		≈ 96%
Robert Dickson 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		1st Network Communications	5010 Lincoln Drive, Ft Myers, Florida, 55354, US	97%	Go To Review
Bob Dickson	Marketing Manager	1st Network Communications	123 Maple Ave, Los Angeles, CA, 92653-1649, United States	96%	Go To Review
Robert Dickson	IT Support	1st Communications & Networks	12 Web Street, Orlando, FL, 23114, US	96%	Go To Review

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
Robert Dixon 1st Network Communications 5010 Lincoln Drive Ft Myers, Florida 55354 US		
Bob Dickson Marketing Manager 1st Network Communications 123 Maple Ave Los Angeles, CA 92653-1649 United States		
Robert Dicksen IT Support 1st Communications & Networks 12 Web Street Orlando, FL 23114 US		

Total Results: 3

Contact Go To Review

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

1 ≈ 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.

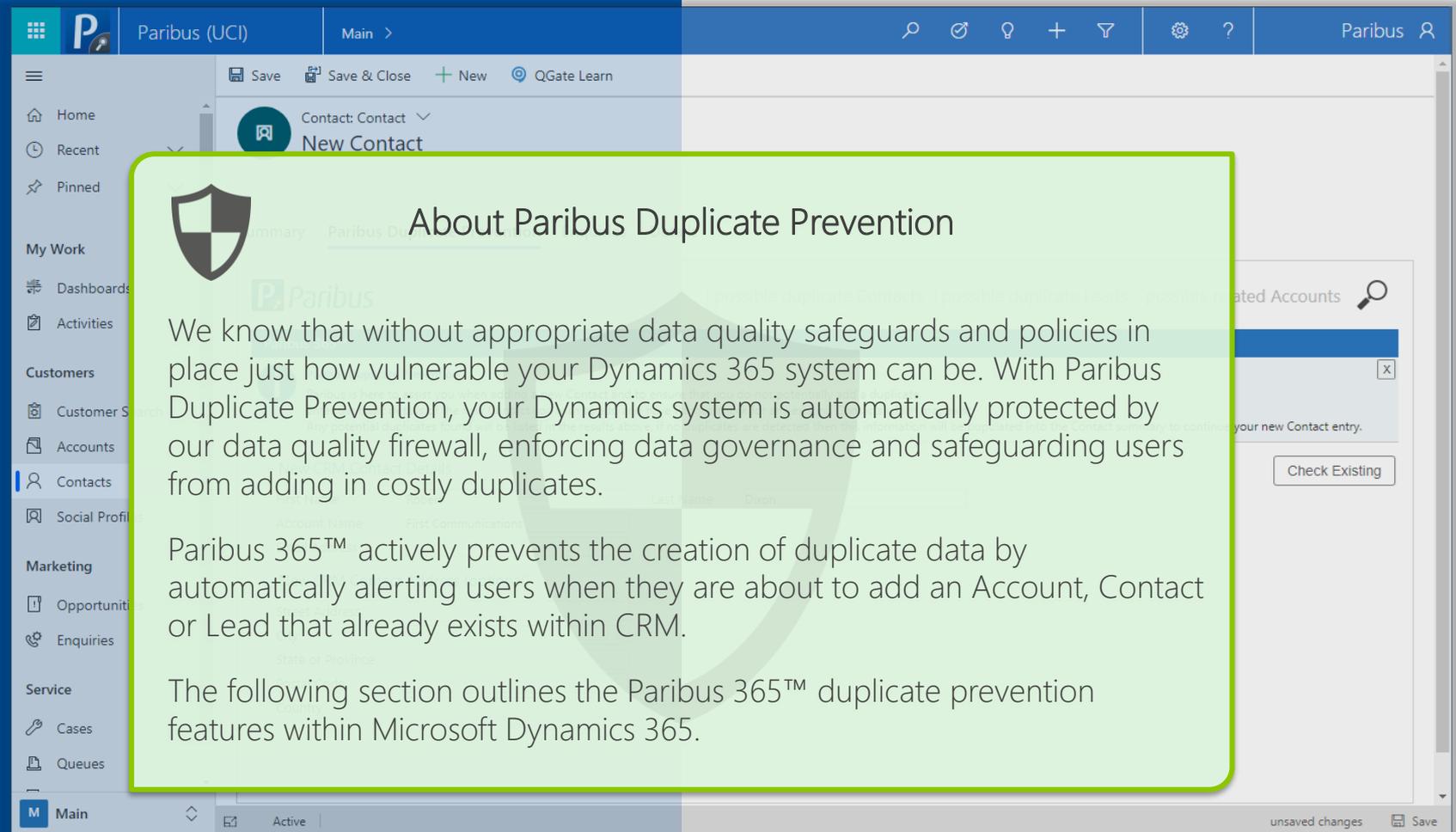


Paribus 365™ Search Results - Associated Contacts

Name	Job Title	Account	≈ Likeness	1	Actions
Bob Dickson		First Networks	99%	Associate	Go To Review
Bobby Dixon		Network 1st Ltd	97%	Associate	Go To Review
Robert Dickson	IT Support	1st Communications & Networks	97%	Associate	Go To Review
Bob Dickson	Marketing Manager	1st Network Communications	96%	Associate	Go To Review
Robert Dixon		1st Network Communications	96%	Associate	Go To Review

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.



The screenshot shows the Microsoft Dynamics 365 user interface. The top navigation bar includes the Paribus logo and the text 'Paribus (UCI)'. The left-hand navigation pane lists various sections: Home, Recent, Pinned, My Work, Dashboards, Activities, Customers, Customer Service, Accounts, Contacts, Social Profiles, Marketing, Opportunities, Enquiries, Service, Cases, and Queues. The main content area is titled 'New Contact' and features a 'Check Existing' button. A large, semi-transparent green box with a white border is overlaid on the center of the screen, containing the following text:

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 Dynamics 365 CRM interface. At the top, the navigation bar includes 'Paribus (UCI)', 'Main >', and search, refresh, and help icons. The left sidebar contains navigation options like Home, Recent, Pinned, My Work, Customers, Marketing, and Service. The main content area is titled 'New Contact' and has a tab labeled 'Paribus Duplicate Prevention' highlighted with a green box and the number '1'. Below the tab, there's a notification banner for 'Paribus Duplicate Prevention' with an information icon and a close button. The notification text reads: '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 the notification 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 first section. At the bottom right of the window, it says 'unsaved changes' and 'Save'.

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.



Paribus (UCI) Main > Save Save & Close + New QGate Learn

Contact: Contact ▾
New Contact

Summary **Paribus Duplicate Prevention** Enquiries Details

Paribus | possible duplicate Contacts | possible duplicate Leads | possible related Accounts 🔍

Paribus 365™

Paribus Duplicate Prevention ⓘ
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.

1 - New CRM Contact Details

First Name Last Name
Account Name
Email Address

2 Check Existing

- New CRM Contact Address (optional)

Street Address
City
State or Province

Service
Country
Queues

unsaved changes Save

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.



The screenshot shows the Paribus 365 interface for a 'New Contact' entry. The top navigation bar includes 'Paribus (UCI)', 'Main', and search icons. The left sidebar lists navigation options like Home, Recent, Pinned, My Work, Customers, and Marketing. The main content area displays 'Paribus Duplicate Prevention' results. A notification banner at the top of the results section states '3 possible duplicate Contacts | 1 possible duplicate Lead | 3 possible related Accounts'. Below this, a table lists potential duplicates with columns for Name, Job Title, Account, Address/Location, Likeness percentage, and Actions.

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

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.



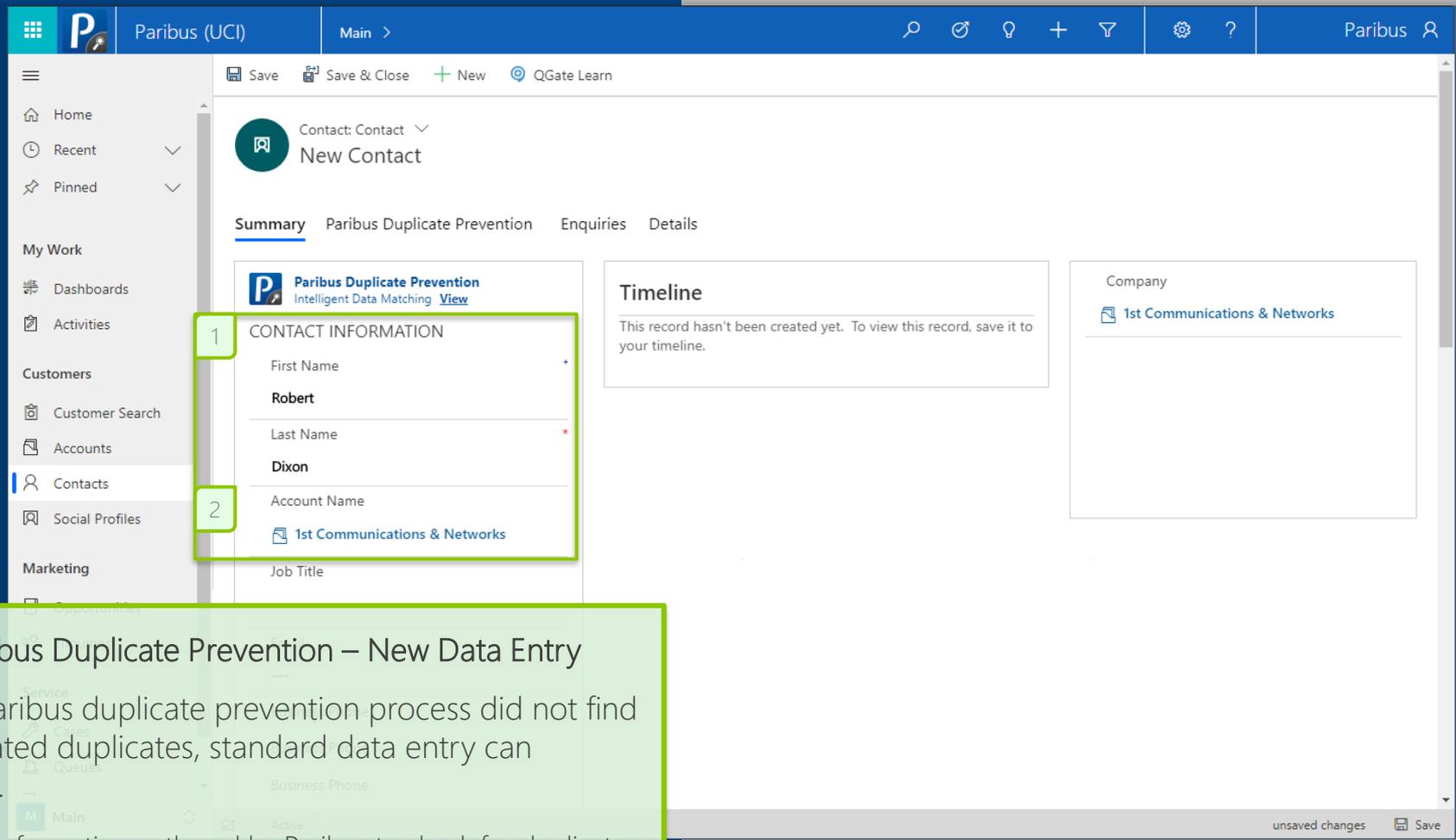
Account	Address/Location	≈ Likeness	Actions
1st Communications & Networks	, Tunbridge Well, United Kingdom	97%	Associate Go To Review
1st Network Communications	123 Maple Ave, Los Angeles, CA, 92653-1649, United States	97%	Associate Go To Review
Communication First	Winchester Road, Southampton, Hampshire,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



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

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.

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

No data available.

Save



The screenshot displays the Dynamics 365 interface for a contact named Bob Dickson. A yellow notification bar at the top states: "Paribus found 7 possible duplicates. Please see the Paribus Duplicate Detection tab for more details." Below this, a tab labeled "Paribus Duplicate Detection" is highlighted, showing "7 possible duplicates detected" and a "Manage Duplicates" link. The contact's profile includes fields for First Name (Bob), Last Name (Dickson), Job Title (Marketing Manager), and Account Name. A timeline entry shows an auto-post on the wall for Bob Dickson on 6/8/2018 at 10:24 AM, with the note "Contact: Created By QGate Software." The right sidebar shows sections for Company, Network, Recent Opportunities, and Recent Cases, all of which currently display "No data available."

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.



The screenshot shows the Paribus 365 CRM interface for a contact named Robert Dixon. The interface includes a top navigation bar with various actions like 'Create Enquiry', 'New', 'Deactivate', 'Connect', 'Add to Marketing List', 'Assign', 'Email a Link', 'Delete', and 'Refresh'. A left-hand navigation pane lists sections like 'Home', 'Recent', 'Pinned', 'My Work', 'Dashboards', 'Activities', 'Customers', 'Contacts', and 'Marketing'. The main content area shows the contact details for Robert Dixon, with tabs for 'Summary', 'Paribus Duplicate Detection', 'Enquiries', 'Details', and 'Related'. A notification banner at the top right of the main area indicates '4 possible duplicate Contacts' and '3 possible duplicate Leads'. Below this, a 'Paribus Duplicate Detection' section provides information on how duplicates were detected. A form below this section shows CRM contact information for Robert Dixon, including '1st Network Communications' as the account/company name. A 'Check for Duplicates' button is visible on the right side of the form.

“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 365 interface. At the top, the user is logged in as Robert Dixon. The main content area displays 'Paribus Duplicate Detection' results for contact Robert Dixon. A search bar at the top of the results section shows '4 possible duplicate Contacts' and '3 possible duplicate Leads'. Below this, a warning message states: 'Warning! - Paribus has detected the following Contacts as potential duplicates to the Contact you are currently working with.' A table lists the detected duplicates:

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

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

RD Contact

Merge Contacts

Choose data from the fields to combine the records into a single primary record.

Merge records by choosing fields with data View fields with conflicting data

Enable parent check

Select Primary record Robert Dixon Bob Dickson

CONTACT INFORMATION Select all fields in this section Select all fields in this section

First Name Robert Bob

Last Name Dixon Dickson

Job Title Marketing Manager

Email bob.dickson@fnc.com

Business Phone (555) 123-9999

OK Cancel

3 possible duplicate Leads

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

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

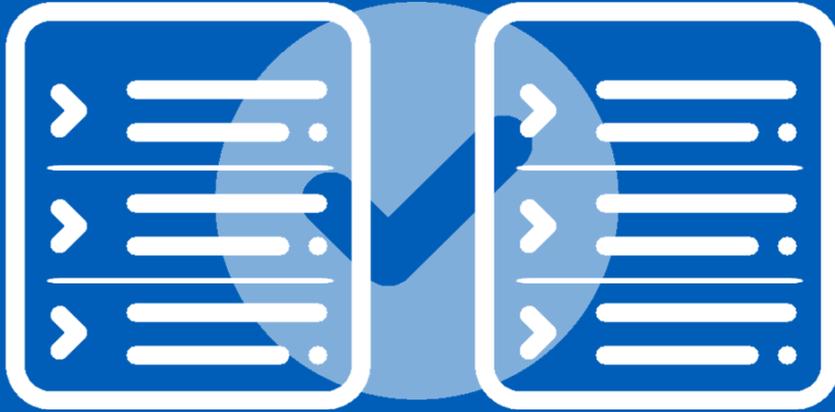
Define Paribus Data Matching Criteria

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

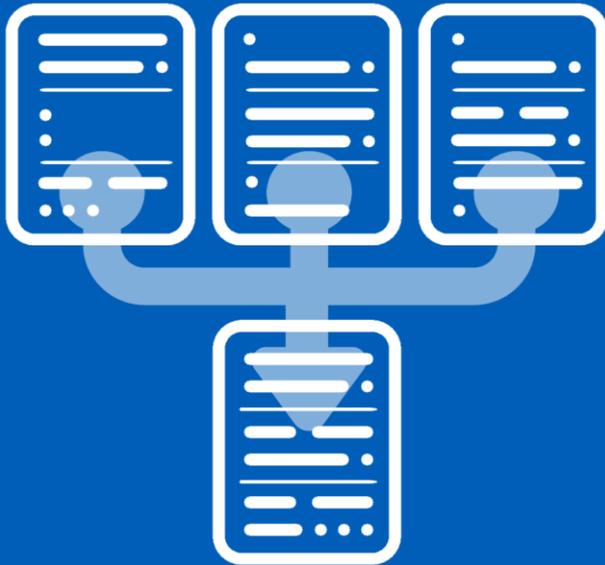
Review Paribus Matching Results

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 Dynamics 365 Paribus Lead Management interface for a lead named Rob Dickson. The interface is divided into several sections:

- Header:** Shows the Paribus logo, the user's name (Paribus (UCI)), and navigation options like Home, Recent, and Pinned.
- Left Navigation:** Lists various sections such as My Work, Customers, Marketing, and Service.
- Lead Profile:** Displays the lead's name (Rob Dickson), enquiry source, and rating (Warm). A green box with the number '1' highlights the 'Paribus Lead Qualification' tab.
- Contact Information:** Shows fields for Topic, First Name (Rob), Last Name (Dickson), Job Title (Marketing Manager), Business Phone, and Mobile Phone.
- Timeline:** Lists events such as 'Auto-post on wall Rob Dickson' with timestamps and actions like Like and Reply.
- Stakeholders:** Shows the lead's name (Bob Dickson) and role (Stakeholder).
- Competitors:** Displays 'No data available.'

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 shows the Paribus Lead Management interface. The top navigation bar includes the Paribus logo, the user name 'Paribus (UCI)', and a 'Main' dropdown menu. The left sidebar contains navigation options: Home, Recent, Pinned, My Work (Dashboards, Activities), Customers (Customer Search, Accounts, Contacts, Social Profiles), and Marketing (Opportunities). The main content area displays a lead profile for 'Enquiry: Enquiry' with the name 'Rob Dickson' and a rating of 'Warm'. A green box labeled '1' highlights the 'Paribus Lead Qualification' tab. Below the profile, a search bar shows 'Paribus' and a green box labeled '2' highlights the results: '1 possible duplicate Lead | 3 possible qualifying Contacts | 3 possible qualifying Accounts'. A 'Paribus 365™' banner is visible, followed by a 'Paribus Duplicate Detection/Lead Qualification' section with a search button and a form for CRM Lead Contact Information (Lead First Name: Rob, Lead Last Name: Dickson, Lead Company Name: First Communications, Address/Location, Email Address). Below this is a 'Detailed Address Search' section.

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. At the top, there is a navigation bar with the Paribus logo and 'Paribus (UCI)'. Below this is a main menu with options like Home, Recent, Pinned, My Work, Customers, and Marketing. The main content area displays a lead profile for 'Rob Dickson' with an enquiry source of 'Enquiry Source' and a rating of 'Warm'. Below the profile, there are tabs for 'Summary', 'Paribus Lead Qualification', 'Details', and 'Related'. The 'Paribus Lead Qualification' tab is active, showing a search result for 'Paribus 365™ Search Results - Possible Duplicate Leads'. A warning message states: 'Warning! - Paribus has detected the following Leads as potential duplicates to the Lead you are currently working with.' Below the warning is a table with columns: Name, Job Title, Account, Address/Location, ≈ Likeness, and Actions. The table contains one entry for 'Bobby Dixon', Marketing Manager at '1st Network Communications' in 'Boston, MA', with a 97% likeness score. A green box highlights the number '1' next to the text '1 possible duplicate Lead' in the search results summary.

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 shows the Paribus Lead Management interface. At the top, there's a navigation bar with 'Paribus (UCI)' and 'Main >'. Below that, a toolbar contains various actions like 'New', 'Delete', 'Qualify', 'Refresh', 'Process', 'Disqualify', 'Add to Marketing List', 'Assign', 'Share', and 'Email a Link'. The main content area displays a lead for 'Enquiry: Enquiry' by 'Rob Dickson' with an 'Enquiry Source' of '---' and a 'Rating' of 'Warm'. Below this, there are tabs for 'Summary', 'Paribus Lead Qualification', 'Details', and 'Related'. The 'Paribus Lead Qualification' tab is active, showing a search bar with 'Paribus' and results: '1 possible duplicate', '3 possible qualifying Contacts', and '3 possible qualifying Accounts'. A table titled 'Paribus 365™ Search Results - Possible Qualifying Contacts' lists three contacts: Bob Dickson, Robert Dixon, and Robert Dickson. Each contact has columns for Name, Job Title, Account, Address/Location, and Likeness. The 'Associate' button for each contact is highlighted with a green box labeled '2'. A green box labeled '1' highlights the search results summary.

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.



The screenshot shows the Microsoft Dynamics 365 user interface. The top navigation bar includes the Paribus logo, the text 'Paribus (UCI)', and a 'Main' dropdown menu. The left-hand navigation pane lists various sections: Home, Recent, Pinned, My Work, Dashboards, Activities, Customers (with sub-items like Customer Search, Accounts, Contacts, Social Profiles), Marketing (with sub-items like Opportunities, Enquiries), and Service (with sub-items like Cases, Queues). The main content area displays a 'New Opportunity' form with fields for 'Opportunity: Opportunity', 'Est. Close Date', and 'Est. Revenue'. A search bar for 'Associated Accounts' is visible on the right. A large, semi-transparent green box with a white border is overlaid on the center of the screen, containing the title 'About Paribus Smart Entity Lookups' and three paragraphs of text. The Paribus logo icon is also present in the top-left corner of this overlay box.

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. At the top, the header shows 'Paribus (UCI)' and 'Main >'. 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, Queues). The main content area shows an 'Opportunity: Opportunity' record titled 'New Opportunity'. Below the title, there are tabs: 'Sum 1', 'Paribus Entity Lookup' (highlighted with a green box), 'Product line items', 'Quotes', and 'Associated Enquiries'. The 'Paribus Entity Lookup' tab is active, displaying a search interface for associated CRM entities. It includes a search bar with the text 'Paribus 365™' and a magnifying glass icon, followed by the text '| 5 possible associated Contacts | 5 possible associated Accounts'. Below this, there is a section titled 'Paribus Entity Lookup' with a sub-header 'Use Paribus to intelligently find the CRM entities you wish to associate with this Opportunity.' and a 'Search' button. The search interface contains three sections: '- Search for the related Contact for this Opportunity' with a 'Contact Name' field containing 'Robert Dickson'; '- Search for the related Account for this Opportunity' with an 'Account Name' field containing '1st Networks'; and '- Filter by location' with an 'Address/Location' field.

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 (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 2 | 5 possible associated Contacts | 5 possible associated Accounts

Paribus 365™

Paribus Entity Lookup
Use Paribus to intelligently find the CRM entities you wish to associate with this Opportunity.

1 - Search for the related Contact for this Opportunity
Contact Name

- Search for the related Account for this Opportunity
Account Name

- Filter by location
Address/Location

Search

Save

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.



The screenshot shows the Paribus CRM interface. The top navigation bar includes 'Paribus (UCI)', 'Main', and various utility icons. The left sidebar contains navigation options like 'Home', 'Recent', 'Pinned', 'My Work', 'Dashboards', 'Activities', 'Customers', 'Marketing', and 'Opportunities'. The main content area displays a 'New Opportunity' card with tabs for 'Summary', 'Paribus Entity Lookup', 'Product line items', 'Quotes', and 'Associated Enquiries'. The 'Paribus Entity Lookup' tab is active, showing search results for 'Paribus 365™ Search Results - Associated Contacts'. A search bar at the top of the results area shows '5 possible associated Contacts' and '5 possible associated Accounts'. Below this is a table of 'Opportunity Associated Contacts' with columns for Name, Job Title, Account, Address/Location, Similarity, and Actions. The table lists five contacts with their respective details and an 'Associate' button for each. A green box highlights the search bar area (1) and another green box highlights the 'Associate' button for the first contact (2).

Name	Job Title	Account	Address/Location	Similarity	Actions
Bob Dickson		First Networks	5010 Lincoln Dr, Tampa, FL, 33802, USA	99%	Associate Go To Review
Bobby Dixon		Network 1st Ltd	, Tampa, FL	97%	Associate Go To Review
Robert Dickson	IT Support	1st Communications & Networks	12 Web Street, Orlando, FL, 23114, US	97%	Associate Go To Review
Bob Dickson	Marketing Manager	1st Network Communications	123 Maple Ave, Los Angeles, CA, 92653-1649, United States	96%	Associate Go To Review
Robert Dixon		1st Network Communications	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 (UCI) Main > Save Save & Close + New QWare Assist

Opportunity: Opportunity ▾ Est. Close Date Est. Revenue ▾
New Opportunity --- ---

Summary Paribus Entity Lookup Product line items Quotes Associated Enquiries

Paribus Entity Lookup
Intelligent Data Searching... [Perform Lookup](#)

Topic ---

1 Contact
Robert Dickson

2 Account
1st Communications & Networks

Purchase Timeframe ---

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

Relationship Assistant
This record hasn't been created yet. To enable this content, create the record.

unsaved changes Save

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 Dickson
- ❖ Cheryl Wiatt, Sheryl Wyatt, 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

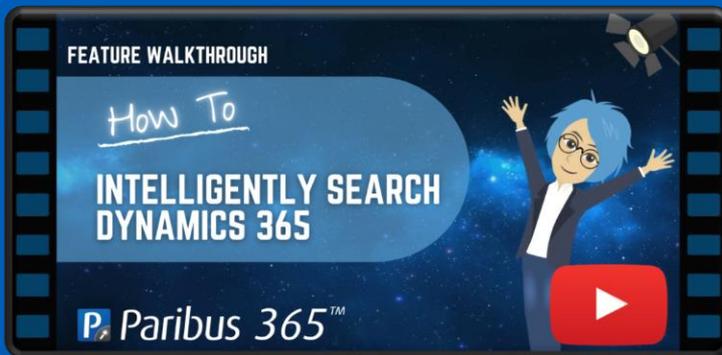
- ❖ Florida University, University of Florida
- ❖ Arizona 1st National Bank, First National Bank of Arizona
- ❖ 123 (Flat A) Acacia Avenue, Flat A – 123 Acacia Avenue

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*TM

www.Paribus365.com

For more information and to request your free trial of Paribus 365,
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