



Paribus Interactive™

for Microsoft Dynamics 365

QGate's Paribus Interactive allows our sales and service staff to find customer records quickly and easily, and means that we can concentrate on delivering service rather than finding names in a database.

Our CRM data is as duplicate-free as it could be, with no added effort, making it easier for forecasting and reporting!

Steve Lockett, Director Locketts Travel

Paribus Interactive™ - Empowering every user to prevent duplicate data

What is Paribus Interactive™

Paribus Interactive is a subscription based solution with a sophisticated data matching engine at its core, which empowers all CRM users to prevent the creation of duplicate Accounts, Contacts and Leads. The solution provides immediate identification of potential existing records, as well as enhanced lookup and search capabilities. Along with preventing the creation of duplicate data, the solution saves users a considerable amount of time in their daily tasks making them more productive and eliminating the frustration of not finding the person or the organization they are looking for, thus improving user adoption.

How Paribus Interactive™ works

Paribus Interactive's sophisticated algorithms work intelligently to identify matching records within your Microsoft Dynamics 365 / CRM. It looks, not only for identical words, but also for phonetic likenesses, synonyms, name variations, word segmentation, noise words, spelling errors, and even word sequencing. The solution shows the search results in a clear and intuitive way and allows the user to click & navigate to that Contact, Lead or Account. The matching is configurable so you can adapt it to your specific CRM customizations as required.

Paribus Interactive™ for Microsoft Dynamics CRM

Paribus Interactive works across Accounts, Contacts and Leads. The solution considers people and companies and therefore can find a "person" with a single search, whether they are a Contact or a Lead. Paribus Interactive works very well with limited information input. For example, it will find people or companies even when the user only remembers part of the company or the person's name. Paribus Interactive is embedded with standard forms, providing an intuitive user experience. It can be added to any form requiring "lookup" capability, and is applied to Opportunities and Cases by default.



Benefits

- Intuitive inline user experience
- Increase user adoption
- Increase customer satisfaction
- Improve and maintain higher data quality
- Improve compliance and report accuracy
- Add enhanced lookup function to any form
- Codeless customization



Example of enhanced Paribus search screen

How Paribus Interactive™ Matches Data

Paribus Interactive's sophisticated matching algorithm provides the ability to intelligently identify matches within your data, based on phonetic likenesses, synonyms and name variations, irrespective of word segmentation, noise words, spelling errors, and even word sequencing.

Phonetic Matching

- > Foto Centre, Photo Center
- > Charyl Wiatt, Sheryl Wyatt

Synonyms and Abbreviations

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

Data Segmentation

- > QGate Software, Q Gate Software, Q-Gate Software
- > Guidemark, Guide Mark, Guide-Mark
- > 3Com, 3 Com, 3-Com

Sequence variations

- > Florida University, University of Florida
- > Arizona 1st National Bank, First National Bank of Arizona

Setting up Paribus Interactive™

The Paribus Interactive service is hosted on Azure and can be located in the geolocation of your choice. Implementation into your CRM Online or IFD CRM instance is simple via QGate's Solution Manager. This administration application will check for the latest version of the solution, allow easy management of roles and security as well as providing access to the codeless customisation features.

Key features

- Subscription based solution hosted on Microsoft Azure
- Intelligent search engine for CRM data
- Find a person (Contact/Lead) or a company (Account/Lead) in a single search
- Supports CRM online and on premises deployments, via IFD
- Directly embedded in Microsoft Dynamics 365 / CRM
- Sophisticated fuzzy matching
- Configurable matching sensitivity
- Intuitive User Experience - easy to use
- Enhanced Lookup & Search
- No data export
- Simple to install, codeless configuration