



Paribus Discovery[™]

for Microsoft Dynamics CRM

Product Tour



Stage 1: Data Discovery



- ❖ Highly configurable matching criteria
- ❖ Sophisticated data matching
- ❖ Artificial intelligence
- ❖ Multi-layered



Stage 2: Data Discovery Review (Approval)



- ❖ Review the data matches found
- ❖ Approve or reject findings
- ❖ Mass systematic approval available
- ❖ Control/define master/duplicate merge roles



Stage 3: Data Cleansing



- ❖ Intelligently merge/purge data
- ❖ Dedicated plugin technology
- ❖ Systematic data merge logic
- ❖ Pluggable and extensible logic



Phonetic Data Matching

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

Synonyms and Abbreviations and Acronym Matching

- ❖ Robert, Bob, Bobbie, Rob, Robbie, Roberto
- ❖ William, Will, Willy, Bill, Billy
- ❖ Richard, Rich, Ric, Dick, Ricky
- ❖ 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

Data Segmentation

- ❖ QGate Software, Q Gate Software Q-Gate Software
- ❖ GuideMark, Guide Mark, Guide-Mark
- ❖ 3Com, 3 Com, 3-Com

Gender Analysis

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

CRM Contact



- ❖ Bill Dixon
- ❖ Marketing Manager
- ❖ IBM
- ❖ 123 Flat A
Acacia Avenue
Phoenix
Arizona

ARIZONA

PHOENIX



CRM Contact



- ❖ Bill Dixon
- ❖ Marketing Manager
- ❖ 1st National Bank of Arizona
- ❖ 123 Flat A
Acacia Avenue
Phoenix
Arizona

CRM Contact



- ❖ William Dickson
- ❖ Manager of Marketing
- ❖ First Bank of Arizona
- ❖ (Flat A) 123 Acacia Avenue
Phoenix
AZ

CRM Contact

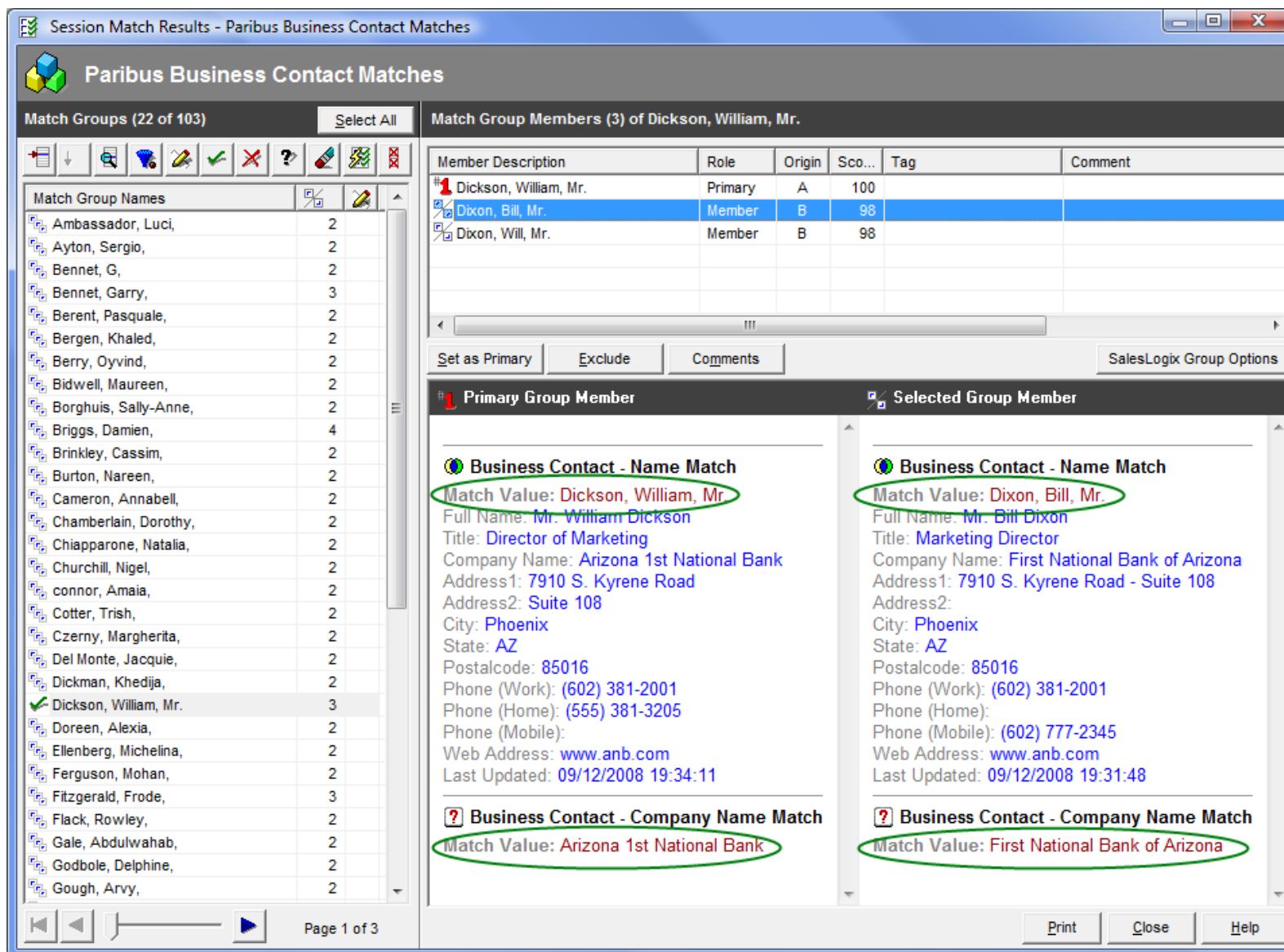


- ❖ Billy Dicksen
- ❖ Marketing Director
- ❖ 1st Bank of National Arizona
- ❖ 123 Acacia Avenue (Flat A)
Phoenix
Arizona

- ❖ Phonetic Data Matching
- ❖ Synonyms and Abbreviations
- ❖ Data Sequence Variation
- ❖ Data Segmentation
- ❖ Gender Analysis
- ❖ Acronym Matching



“Data Discovery Review” (Data Matching Approval)





CRM Duplicate Contact



- ❖ Bill Dixon
- ❖ Marketing Manager
- ❖ 1st National Bank of Arizona
- ❖ 3 x Activities
- ❖ 4 x Orders

CRM Duplicate Contact



- ❖ William Dickson
- ❖ Marketing Manager
- ❖ 1st Bank of Arizona
- ❖ 1 x Activity
- ❖ 2 x Orders

CRM Duplicate Contact



- ❖ Bill Dixon
- ❖ Marketing Manager
- ❖ 1st National Bank of Arizona
- ❖ 2 x Activities
- ❖ 3 x Orders



New CRM Master Contact



- ❖ William Dickson
- ❖ Marketing Manager
- ❖ 1st National Bank of Arizona
- ❖ 6 x Activity
- ❖ 9 x Orders



Paribus Discovery™

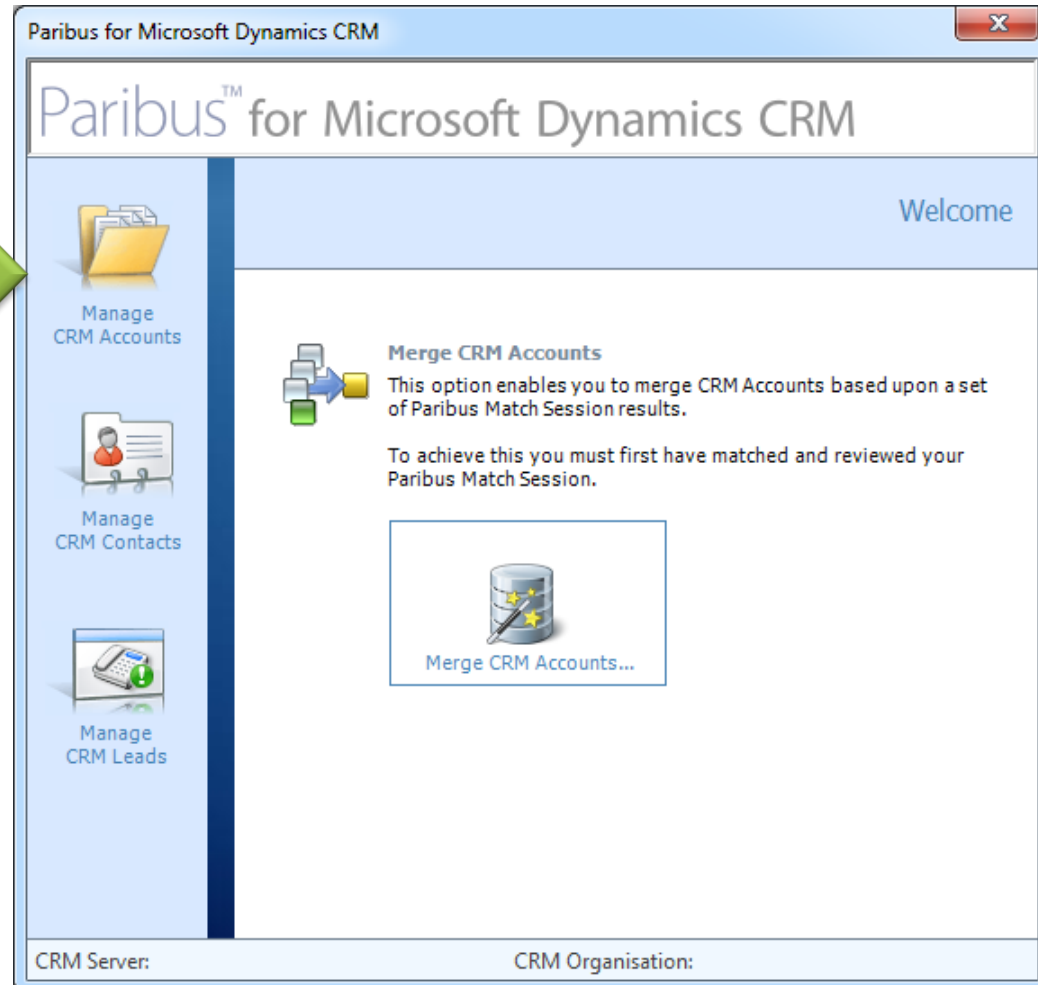
for Microsoft Dynamics CRM

“Data Cleansing”
(Dynamics CRM Merge Plugin)



Paribus CRM Plugin

Dedicated Paribus for Microsoft Dynamics CRM plugin responsible for the data cleansing (data merging, purging and consolidation) of CRM data.






Session Selection

Select a Paribus session of match results by which to cleanse your Microsoft Dynamics CRM.

CRM

Paribus - Data Merge Wizard (CRM Accounts)

Paribus Merge of CRM Accounts
Step 2 of 6

 **Select Paribus Match Session**
Select a Paribus Match Session containing match results of CRM Accounts you wish to merge.

Note: Only Paribus Match Groups with a 'Reviewed' status will be included in the merge process.

Paribus Match Session	
Session Detail	Session Value
Session Name	Microsoft Dynamics CRM - Account Match
Session Description	Parbus intelligent matching of CRM Accounts.
Session Code	CRM-ACCOUNTS
Match Groups	47
Groups Members	108

Select Session...

Cancel < Back Next >




Group Processing

Control the way a group of Paribus match results are used to merge data within your Microsoft Dynamics CRM.

This area is also open to customization of custom rules.

Paribus - Data Merge Wizard (CRM Accounts)

Paribus Merge of CRM Accounts
Step 3 of 6

 **Match Group Processing**

During the processing of Paribus match results, Paribus provides the ability for each Match Group being merged to be re-evaluated to determine the best primary group member (master entity).

Select the Match Group processing option you would like to use in this operation:

☐ **As Reviewed**
Select this option to leave the Match Group as it was manually reviewed.

☒ **Re-evaluate Match Group**
Select this option to automatically re-evaluate the Match Group with a selected rule.

Match Group Processing Rule

Group Rule: Account most recently created ▼

Class Name: AccountMostRecentlyCreated
Version: 1.0

Use this rule to auto-select the Master Account with the most recent CreatedOn date.

Click Next to continue...

Cancel < Back Next >




Merge Rules

Select from a collection of Paribus data merge rules how duplicate data is merged within your Microsoft Dynamics CRM.

This area is also open to customization of custom rules.

Paribus - Data Merge Wizard (CRM Accounts)

Paribus Merge of CRM Accounts
Step 4 of 6

 **CRM Entity Data Merging**

During the merging of CRM entities, Paribus will attempt to merge data into the master CRM entity from the related duplicates. As part of this merge process, all 1-to-1 and 1-to-many data values will be consolidated from the duplicate(s).

Select the Paribus Merge Rule you would like to use in this CRM Account merge operation.

Entity Data Merge Rule

Merge Rule:

Class Name: AccountStandardMergeRule

Version: 1.0

Description: Use this rule to merge missing items within the base Account entity. This rule will also preserve all addresses and manage 'Do not solicit' flags.

Click Next to continue...




Merge Processing

Progressive status
information on the
merging of duplicate
data within your
Microsoft Dynamics
CRM.


Paribus for Microsoft Dynamics CRM - Data Merge Wizard

Paribus Account Merge

 **Paribus Data Merging...**
Paribus is now merging your CRM Accounts.
This process may require considerable time to complete based upon the amount of records to be processed.

Paribus Merge Process	
Current Process:	Merging Entities...
Master Entity:	Great Bikes
Duplicate Entity:	Great Bicycle Supply

Paribus Merge Statistics	
Match Groups Processed:	4 of 6
Entities Merged:	4
Entities Skipped:	0



Note: Should you wish to cancel this merge process, Paribus will continue to merge the current Match Group Members before cancelling the merge.

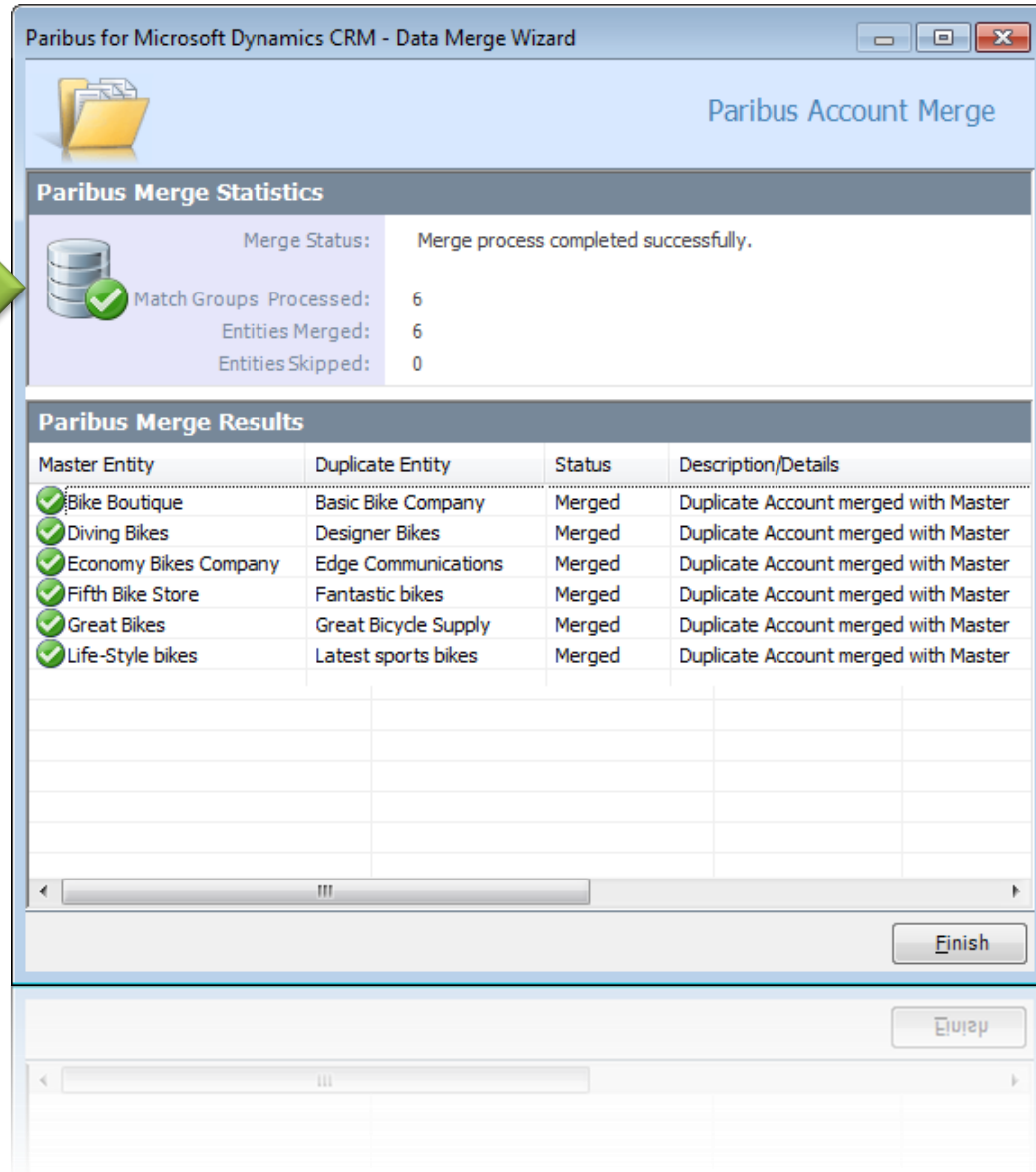
Cancel

Cancel



On completion of the Paribus merge process, merge statistics and merge results are presented for analysis on the processing of your Microsoft Dynamics CRM data.

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