



Paribus Interactive[™]

for Microsoft Dynamics 365

Product Tour



Paribus Intelligent Search

Explore the power of Paribus Search



Paribus Lookup Support

Replace CRM lookups with Paribus



Paribus Lead Management

Enhance Lead management with Paribus



Paribus Duplicate Prevention

Explore the prevention of duplicate data



Paribus Duplicate Detection

Explore how Paribus detects duplicates



Paribus Cloud Match Engine

The power behind the Paribus Cloud

Welcome to the Paribus Interactive™ Product Tour

Explore the many ways how Paribus Interactive enhances the user experience when searching and finding customers in Dynamics 365.

See how Paribus supports your data quality management objectives by readily identifying existing data when adding new customers, and therefore preventing the needless creation of duplicate data.

Appreciate the importance and benefits of Paribus' duplicate detection in providing a virtual Single Customer View (SCV) when engaging with customers in Dynamics 365.

*Realize your customer data with
Paribus Interactive™ – Find it, trust it, engage it!*

www.ParibusCloud.com





About Paribus Intelligent Search

At the heart of the Paribus Interactive™ solution is an intelligent search engine, providing a sophisticated fuzzy search capability embedded seamlessly within Microsoft Dynamics 365.

Performing fuzzy searches within Dynamics 365 using Paribus Interactive™ is like having your favourite internet search engine replace the standard Dynamics 365 searches and lookups.

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



QGate

Paribus (UCI) Main

Paribus Interactive™ Intelligent Searching for Microsoft Dynamics 365

Search Profile General Search

- Paribus Interactive™ General Search

Person Name

Account Name

Address/Location

Search

60% 100%

- Detailed Address Search

Street Address

City

State or Province

Postal Code

Country

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

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

Contact Robert Dixon Go To Review

1st Network Communications

5010 Lincoln Drive
Ft Myers, Florida
33534
US

≈ 97%

Contact Bob Dickson Go To Review

Marketing Manager

1st Network Communications

123 Maple Ave
Los Angeles, CA
92653-1649
United States

≈ 96%

Contact Robert Dickson Go To Review

IT Support

1st Communications & Networks

12 Web Street
Orlando, FL
32814
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.



QGate Paribus (UCI) Main >

Paribus Interactive™ Intelligent Searching for Microsoft Dynamics 365

Search Profile: General Search

1 - Paribus Interactive™ General Search

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

- Detailed Address Search

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

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

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

Contact Robert Dixon Go To Review
1st Network Communications
5010 Lincoln Drive
Ft Myers, Florida 33554
US ≈ 97%

Contact Bob Dickson Go To Review
Marketing Manager
1st Network Communications
123 Maple Ave
Los Angeles, CA 92653-1649
United States ≈ 96%

Contact Robert Dickson Go To Review
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.



QGate

Paribus (UCI) Main

Paribus Interactive™ Intelligent Searching for Microsoft Dynamics 365

Search Profile: General Search

Search

60% 100%

- Paribus Interactive™ General Search

Person Name: Bob Dixon

Account Name: Communications

Address/Location:

- Detailed Address Search

Street Address:

City:

State or Province:

Postal Code:

Country:

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

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

Contact Robert Dixon Go To Review

1st Network Communications

5010 Lincoln Drive

Ft Myers, Florida

55354

US

≈ 97%

Contact Bob Dickson Go To Review

Marketing Manager

1st Network Communications

123 Maple Ave

Los Angeles, CA

92653-1649

United States

≈ 96%

Contact Robert Dickson Go To Review

IT Support

1st Communications & Networks

12 Web Street

Orlando, FL

23114

US

≈ 96%

Total Results: 3

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.



QGate

Paribus (UCI) Main

Paribus Interactive™

Intelligent Searching for Microsoft Dynamics 365

Search Profile: General Search

- Paribus Interactive™ General Search

Person Name: Bob Dixon

Account Name: Communications

Address/Location:

- Detailed Address Search

Street Address:

City:

State or Province:

Postal Code:

Country:

2 Search

60% 100%

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

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

Contact Robert Dixon Go To Review

1st Network Communications

5010 Lincoln Drive
Ft Myers, Florida
55354
US

≈ 97%

Contact Bob Dickson Go To Review

Marketing Manager

1st Network Communications

123 Maple Ave
Los Angeles, CA
92653-1649
United States

≈ 96%

Contact Robert Dickson Go To Review

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 Interactive™ 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 Dickson
IT Support
[1st Communications & Networks](#)
12 Web Street
Orlando, FL
23114
US

≈ 96%

Total Results: 3

Paribus Interactive™ 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 Interactive™ 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

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 Interactive™ 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.



About Paribus Entity Lookups

The power of the Paribus Interactive™ search engine can be used to replace the CRM standard lookup capabilities of Microsoft Dynamics 365, to provide more intelligently powered entity lookups.

Using multiple search criteria, CRM users can perform Paribus searches for business entities and have these populate into the standard CRM lookup fields.

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



Paribus Entity Lookups

[Tour Menu](#)

The screenshot displays the QGate software interface. The top navigation bar includes the QGate logo, the current entity 'Paribus (UCI)', and a 'Main' dropdown. A toolbar with icons for search, share, help, and other functions is visible. The left sidebar contains a navigation menu with sections like 'Home', 'Recent', 'Pinned', 'My Work', 'Customers', 'Marketing', and 'Service'. The 'Opportunities' section is currently selected. The main content area shows the 'New Opportunity' form. A tab labeled 'Paribus Entity Lookup' is highlighted with a green box and a green circle containing the number '1'. Below this tab, the 'Paribus Interactive™' section is visible, featuring a search bar and a 'Search' button. The search results show '5 possible associated Contacts' and '5 possible associated Accounts'. The search criteria include 'Contact Name' (Robert Dickson), 'Account Name' (1st Networks), and 'Filter by location' (Address/Location).

Paribus Entity Lookups

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



QGate

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 Interactive™

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 Robert Dickson

- Search for the related Account for this Opportunity
Account Name 1st Networks

- Filter by location
Address/Location

Search

Save

Paribus 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.



QGate

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 Interactive™ Search Results - Associated Contacts

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

Name	Job Title	Account	Address/Location	2 Likeness	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 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 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).



About Paribus Lead Management

Paribus Interactive™ can play an active role in the management of Leads within Microsoft Dynamics 365, to assist in the qualification process and to automatically safeguard against duplicate data.

Paribus Lead management provides valuable insight during the Lead engagement and qualification process to ensure Leads do not potentially conflict with existing data (e.g. existing Accounts and Contacts). Paribus proactively alerts users when Leads are in fact already customers, assisting to better qualify them and avoid misguided interaction with existing customers.

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



The screenshot displays the QGate Dynamics 365 interface for Paribus Lead Management. The top navigation bar shows the QGate logo and the current view is 'Paribus (UCI)'. The left sidebar contains navigation options like Home, Recent, Pinned, My Work, Customers, Marketing, and Service. The main content area is titled 'Enquiry: Enquiry' and 'Rob Dickson'. A green box highlights the 'Paribus Lead Qualification' tab, which is also indicated by a green circle with the number '1'. Below this tab, there is a 'Contact' section with fields for Topic, First Name, Last Name, Job Title, Business Phone, and Mobile Phone. To the right of the contact details is a 'Timeline' section showing two auto-posts from QGate Software. Further right is a 'Stakeholders' section listing 'Bob Dickson' with a 'Stake' role. At the bottom right, there is a 'Competitors' section stating '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 QGate Paribus Lead Management interface. The top navigation bar includes the QGate logo and a dropdown menu for 'Paribus (UCI)'. The main content area shows a lead profile for 'Rob Dickson' with a 'Paribus Lead Qualification' tab highlighted. A summary bar indicates '1 possible duplicate Lead', '3 possible qualifying Contacts', and '3 possible qualifying Accounts'. Below this is a 'Paribus Interactive' section with a 'Paribus Duplicate Detection/Lead Qualification' message and a form for CRM Lead Contact Information.

Paribus Lead Qualification

Summary **Paribus Lead Qualification** Details Related

Paribus 1 possible duplicate Lead | 3 possible qualifying Contacts | 3 possible qualifying Accounts

Paribus Interactive™

Paribus Duplicate Detection/Lead Qualification

Paribus has used the following information from the Lead you are working with to:

- Detect for potential duplicate Leads.
- Assist in qualifying the Lead against existing Accounts and Contacts.

- CRM Lead Contact Information

Lead First Name: Rob Lead Last Name: Dickson

Lead Company Name: First Communications

Address/Location:

Email Address:

- Detailed Address Search

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 QGate Paribus Lead Management interface. The top navigation bar includes the QGate logo, the current lead 'Paribus (UCI)', and a 'Main' dropdown. A secondary toolbar contains actions like New, Delete, Qualify, Refresh, Process, Disqualify, Add to Marketing List, Assign, Share, and Email a Link. The left sidebar lists navigation options: Home, Recent, Pinned, My Work, Dashboards, Activities, Customers (Customer Search, Accounts, Contacts, Social Profiles), and Marketing (Opportunities). The main content area displays lead details for 'Enquiry: Enquiry' and 'Rob Dickson' (RD). Below this, tabs for Summary, Paribus Lead Qualification (active), Details, and Related are shown. A summary bar indicates '1 possible duplicate Lead', '3 possible qualifying Contacts', and '3 possible qualifying Accounts'. A red warning banner titled 'Paribus Duplicate Detection' states: 'Warning! - Paribus has detected the following Leads as potential duplicates to the Lead you are currently working with.' Below the banner is a table of potential duplicates:

Name	Job Title	Account	Address/Location	≈ Likeness	Actions
Bobby Dixon	Marketing Manager	1st Network Communications	, Boston, MA	97%	Go To Review

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 QGate Paribus Lead Management interface. The top navigation bar includes the QGate logo, the user 'Paribus (UCI)', and a 'Main' dropdown. A secondary toolbar contains actions like New, Delete, Qualify, Refresh, Process, Disqualify, Add to Marketing List, Assign, Share, and Email a Link. The left sidebar lists navigation options: Home, Recent, Pinned, My Work, Dashboards, Activities, Customers (Customer Search, Accounts, Contacts, Social Profiles), and Marketing (Opportunities, Enquiries, Service). The main content area shows a lead profile for 'Enquiry: Enquiry' by 'Rob Dickson' (RD) with an 'Enquiry Source' of '---' and a 'Rating' of 'Warm'. Below this, the 'Paribus Lead Qualification' tab is active, displaying 'Paribus Interactive™ Search Results - Possible Qualifying Contacts'. A summary bar indicates '1 possible duplicate', '3 possible qualifying Contacts', and '3 possible qualifying Accounts'. A 'Lead Qualifying Contact' section prompts the user to 'Select one of the following Contacts to associate/qualify against this Lead.' Below this is a table of search results:

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 Duplicate Prevention

Paribus Interactive™ plays an active role when adding new data (Accounts, Contacts and Leads) into Microsoft Dynamics 365 to automatically prevent and safeguard against duplicate data entry.

Paribus duplicate prevention works proactively as data is being entered (and before the information is fully committed) to alert users of potential duplicate data, thus saving users valuable time, improving user efficiency, and preventing duplicate data entry.

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



The screenshot shows the QGate CRM interface. The top navigation bar includes 'Paribus (UCI)' and 'Main'. The left sidebar lists various modules like Home, Recent, Pinned, My Work, Dashboards, Activities, Customers, and Marketing. The main content area is titled 'New Contact' and features a tabbed interface with 'Summary', 'Paribus Duplicate Prevention', 'Enquiries', and 'Details'. The 'Paribus Duplicate Prevention' tab is highlighted with a green box and a green '1' in the top left corner. Below the tabs, there's a section for 'Paribus Interactive™' with a message about duplicate prevention. The form fields for 'New CRM Contact Details' include First Name (Robert), Last Name (Dixon), Account Name (First Communications), and Email Address. Below that, there's a section for '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 form fields. The bottom status bar shows 'unsaved changes' and a 'Save' button.

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.



QGate

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 Interactive™

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: Robert Last Name: Dixon

Account Name: First Communications

Email Address:

2 - New CRM Contact Address (optional)

Street Address:

City:

State or Province:

2 Check Existing

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.



QGate 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 Interactive™ 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		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

unsaved changes Save

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.



QGate Paribus (UCI) Main

Save Save & Close New QGate Learn

Contact: Contact New Contact

Summary **Paribus Duplicate Prevention** Enquiries Details

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

Paribus Interactive™ Search Results - Possible Related Accounts

Potential Associated Accounts

Paribus has identified the following Accounts as potentially associated to the Contact you wish to add. By selecting one of these Accounts, the new Contact will become associated to that Account.

Account	Address/Location	≈ Likeness	Actions
1st Communications & Networks	, Tunbridge Well, United Kingdom	97%	2 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

unsaved changes Save

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.



QGate

Paribus (UCI)

Main >

Save Save & Close + New QGate Learn

Contact: Contact

New Contact

Summary Paribus Duplicate Prevention Enquiries Details

Paribus Duplicate Prevention
Intelligent Data Matching [View](#)

CONTACT INFORMATION

First Name
Robert

Last Name
Dixon

Account Name
[1st Communications & Networks](#)

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.



QGate Paribus (UCI) Main

Paribus Interactive 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

Paribus Interactive™ plays an active role when viewing information within Microsoft Dynamics 365 to automatically detect whenever possible where duplicates may exist.

When working with business entities within Dynamics 365 (e.g. customers), it is vitally important to appreciate if that entity has any potential duplicates and to know you are not always working with the single version of the truth (Single Customer View – SCV).

Paribus' duplicate detection automatically alerts users if the entity they are engaging with has any possible duplication, providing an easy ability for users to cross-review those duplicates within Dynamics 365.

The following section outlines the Paribus Interactive duplicate detection features within Microsoft Dynamics 365.

CONTACT INFORMATION

Bob Dickson

Summary Paribus Duplicate Detection Enquiries Details Related

RECENT OPPORTUNITIES

RECENT CASES

Knowledge Articles

(555) 123-9999

M Main Active Save



QGate

Paribus (UCI) Main >

2

1

Paribus Interactive 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

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.



The screenshot shows the QGate Dynamics 365 interface. The top navigation bar includes the QGate logo, the contact name 'Paribus (UCI)', and a 'Main' dropdown. A secondary bar contains action buttons: 'Create Enquiry', 'New', 'Deactivate', 'Connect', 'Add to Marketing List', 'Assign', 'Email a Link', 'Delete', and 'Refresh'. The left sidebar lists navigation options: Home, Recent, Pinned, My Work, Dashboards, Activities, Customers, Customer Search, Accounts, Contacts (selected), Social Profiles, and Marketing. The main content area displays the contact details for 'Robert Dixon' (RD). The 'Paribus Duplicate Detection' tab is active, showing a notification that 4 possible duplicate contacts and 3 possible duplicate leads were found. Below this, the 'CRM Contact Information' section is highlighted, showing fields for First Name (Robert), Last Name (Dixon), Account/Company Name (1st Network Communications), Address/Location, and Email Address. A 'Check for Duplicates' button is visible on the right. The bottom of the interface shows a 'Save' button.

"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.



QGate Paribus (UCI) Main

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

Contact: Contact Robert Dixon

Summary **Paribus Duplicate Detection** Enquiries Details Related

Paribus 1 | 4 possible duplicate Contacts 3 possible duplicate Leads

Paribus Interactive™ Search Results - Possible Duplicate Contacts

Paribus Duplicate Detection
Warning! - Paribus has detected the following Contacts as potential duplicates to the Contact you are currently working with.

Name	Job Title	Account	Address/Location	≈ Likeness	Actions
Bobby Dixon		Network 1st Ltd	, Tampa, FL	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
Bob Dickson		First Networks	5010 Lincoln Dr, Tampa, FL, 33802, USA	94%	Go To Review
Robert Dickson	IT Support	1st Communications & Networks	12 Web Street, Orlando, FL, 23114, US	93%	Go To Review

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 Cloud Match Engine

The Paribus Interactive™ 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 Interactive™ 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 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

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



Paribus Interactive™

www.ParibusCloud.com

For more information and to request a free trial, contact your Microsoft Dynamics partner or local QGate business center:

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