Paribus 365™

for Microsoft Dynamics 365

Product Tour

www.Paribus365.com

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Paribus 365™ Product Tour Menu

Paribus Intelligent Search
Explore the power of Paribus Search

Paribus Smart 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 Data Cleansing
Discover, review and merge duplicates

Paribus Cloud 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.

Realize the true potential of your customer data with Paribus 365™

Find it, trust it, engage it!

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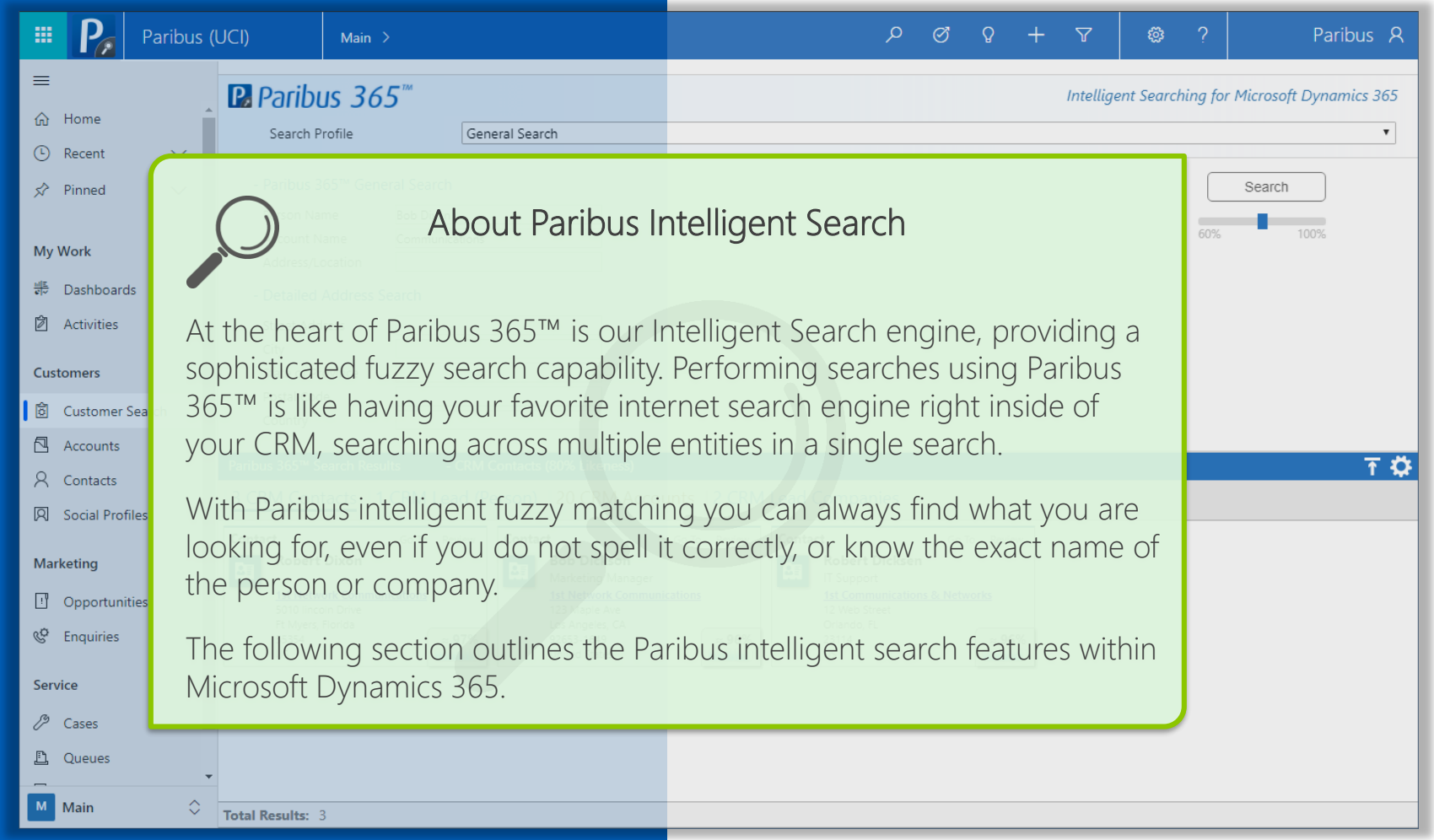
Paribus Intelligent Search

Tour Menu



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.

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Paribus Intelligent Search

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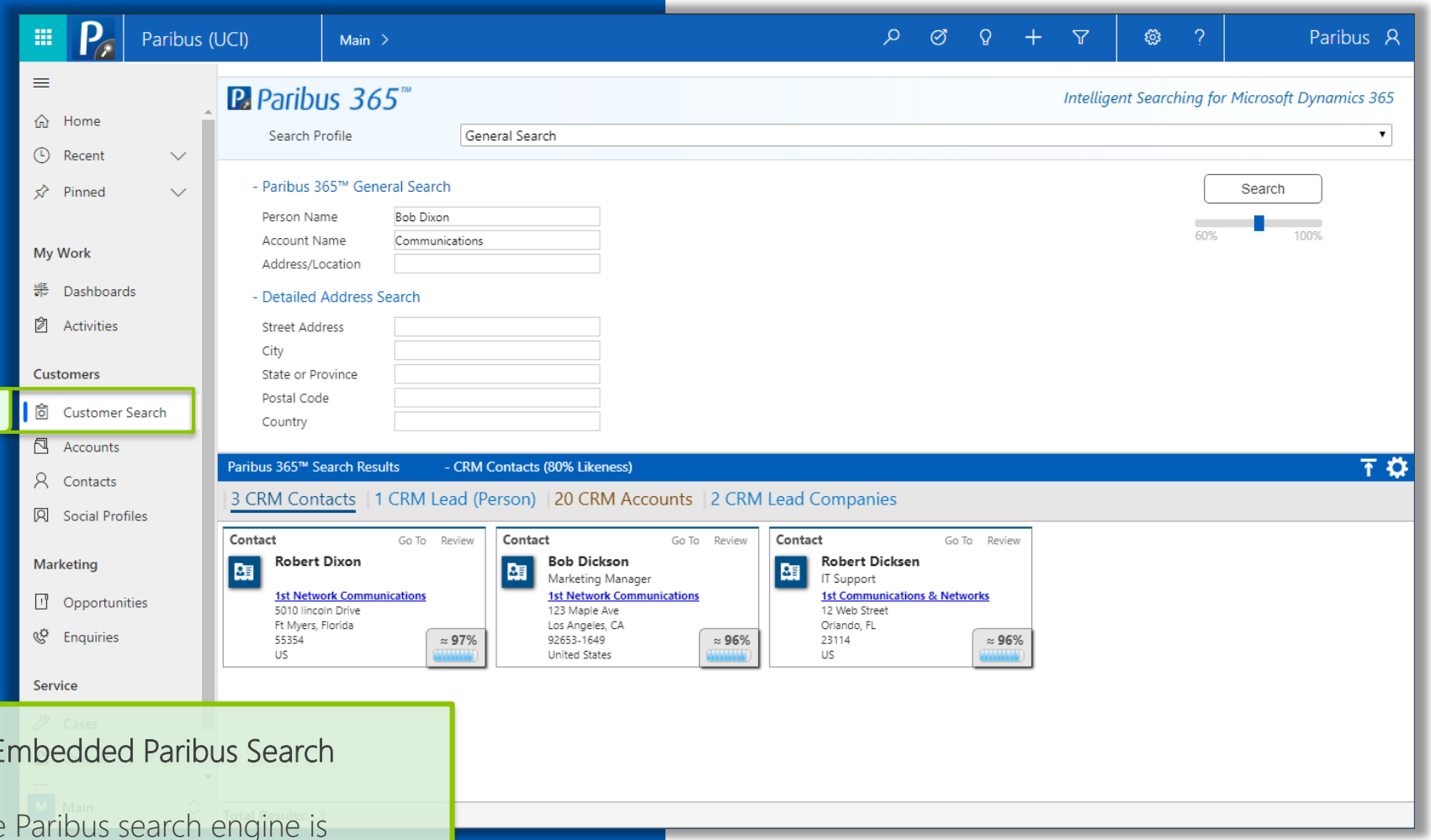

Embedded Paribus Search

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

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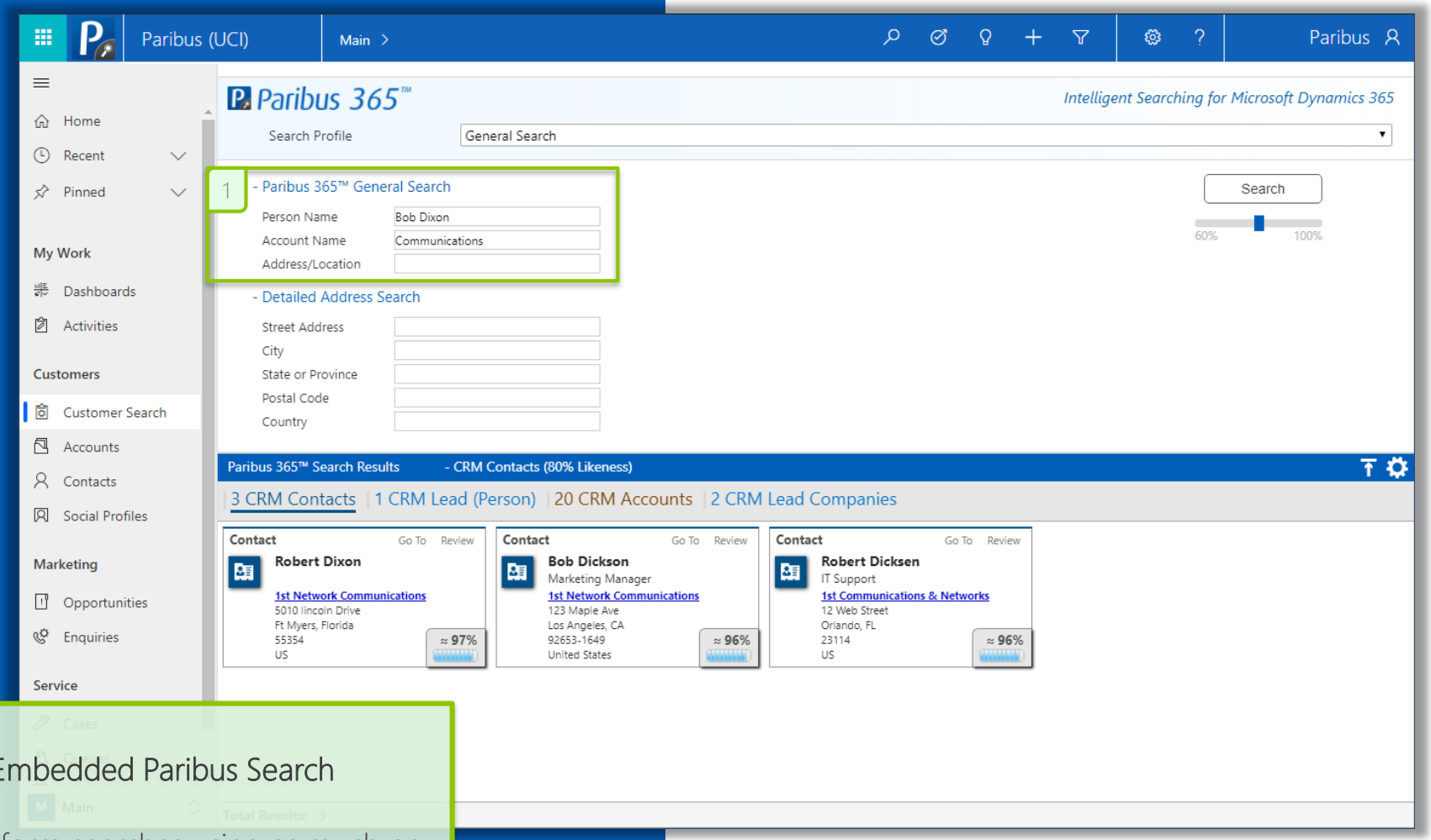

Embedded Paribus Search

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

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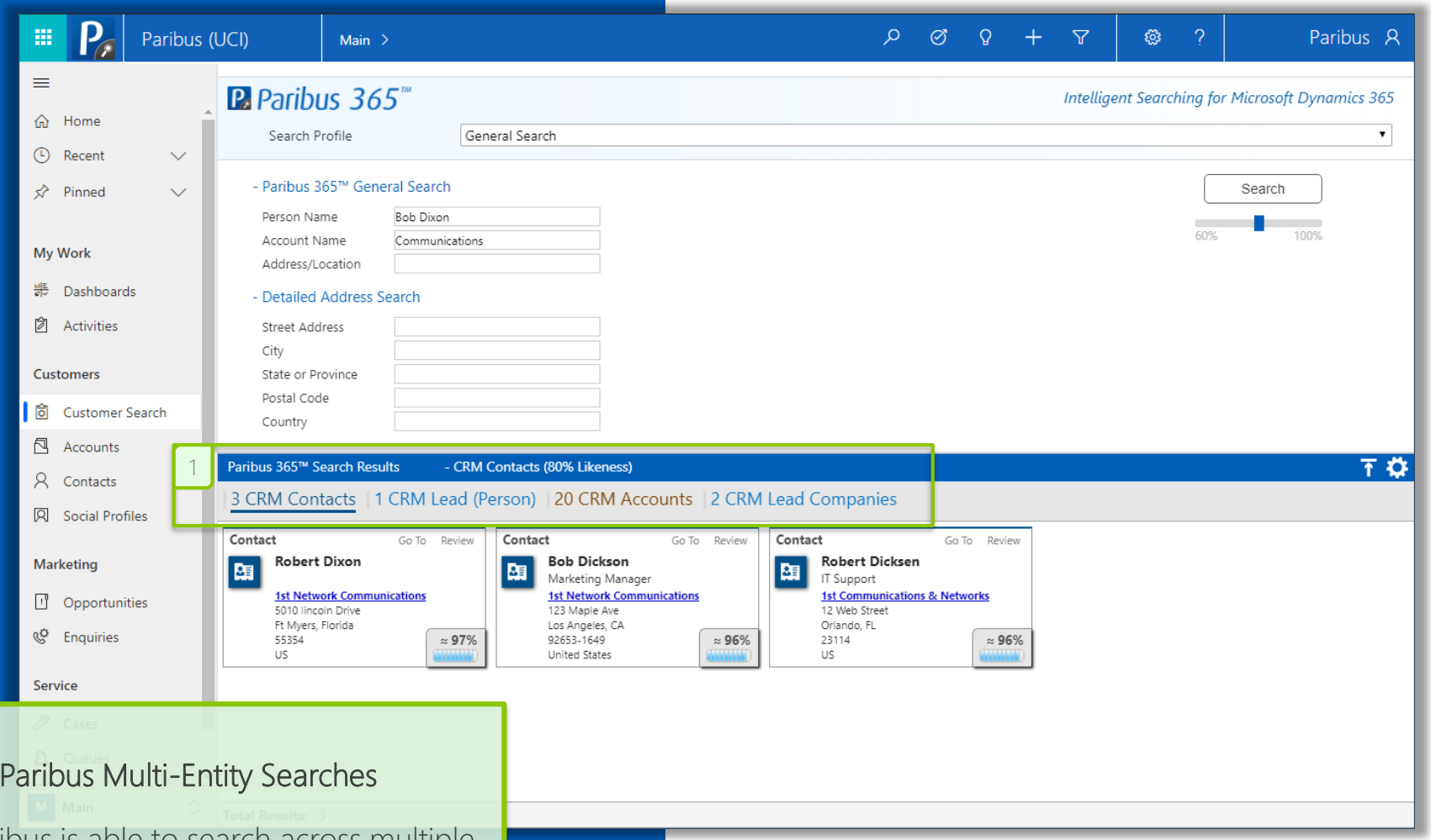

Paribus Multi-Entity Searches

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.

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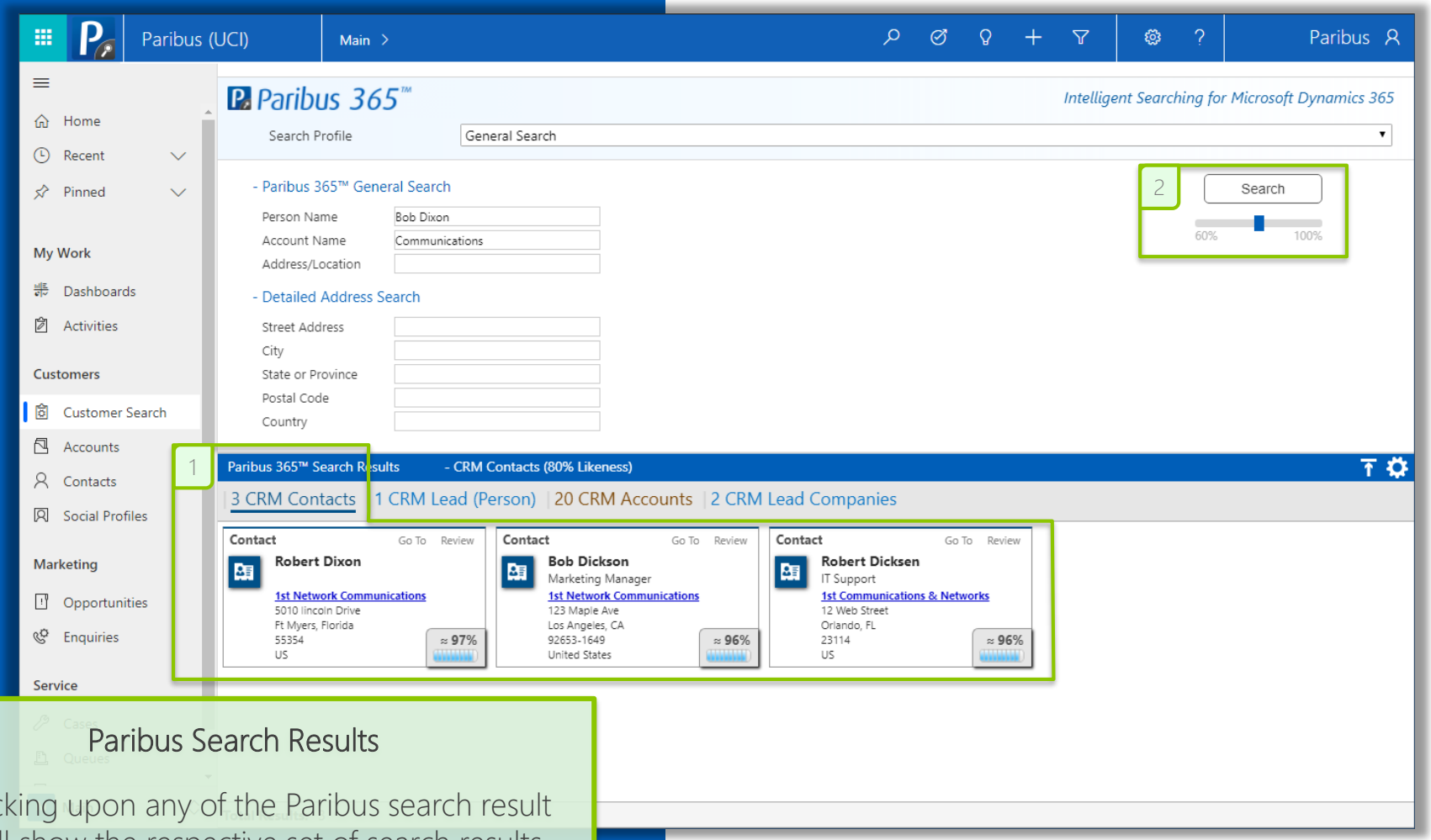

Paribus Search Results

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.

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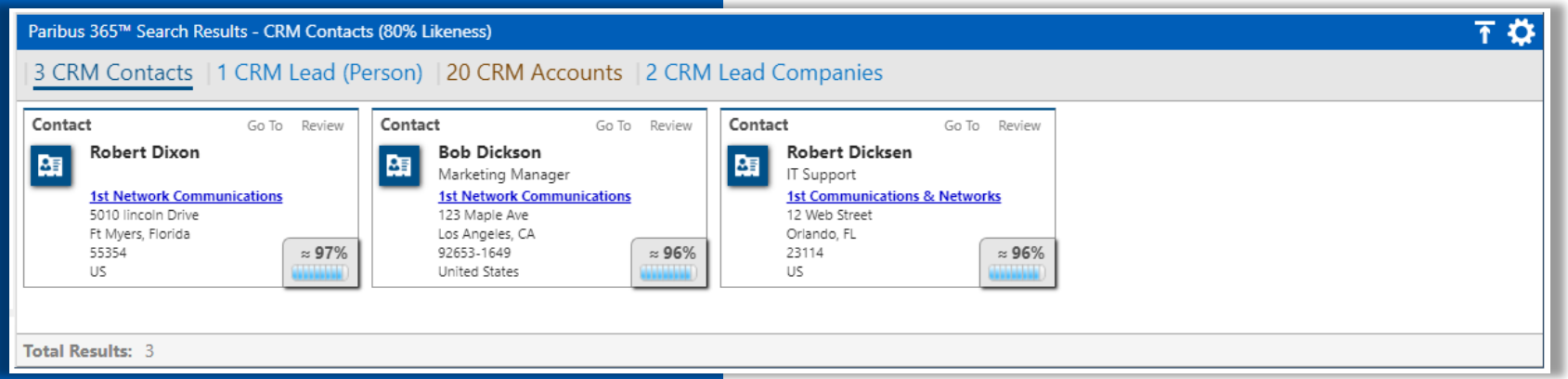

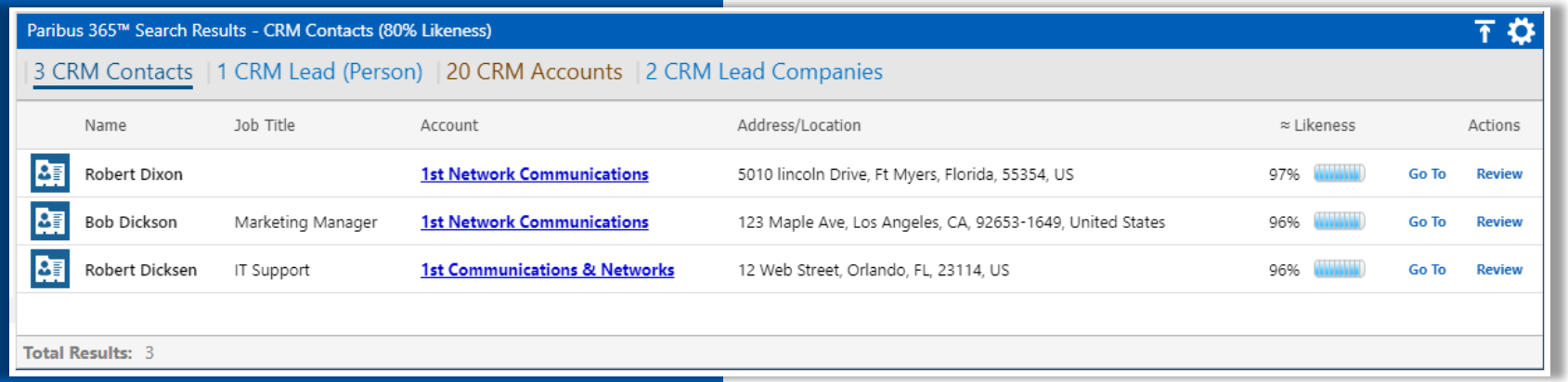

Paribus Search Result Styles

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.

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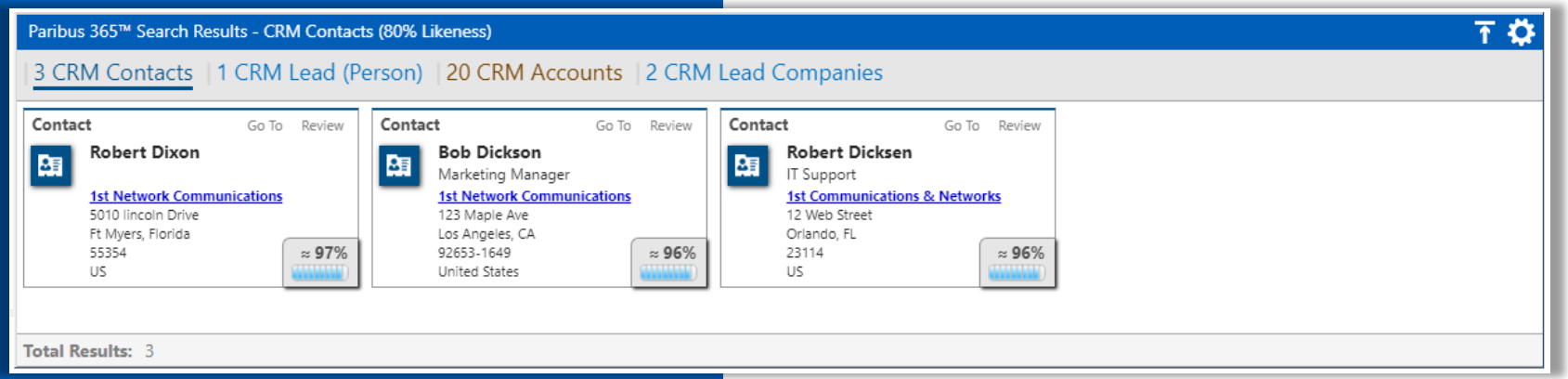

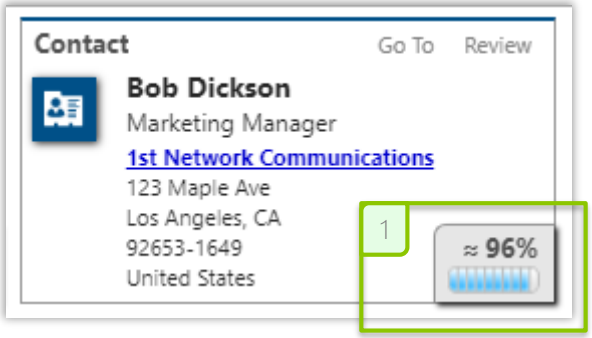

Paribus Search Result - Match Scoring

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.

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Paribus Intelligent Search

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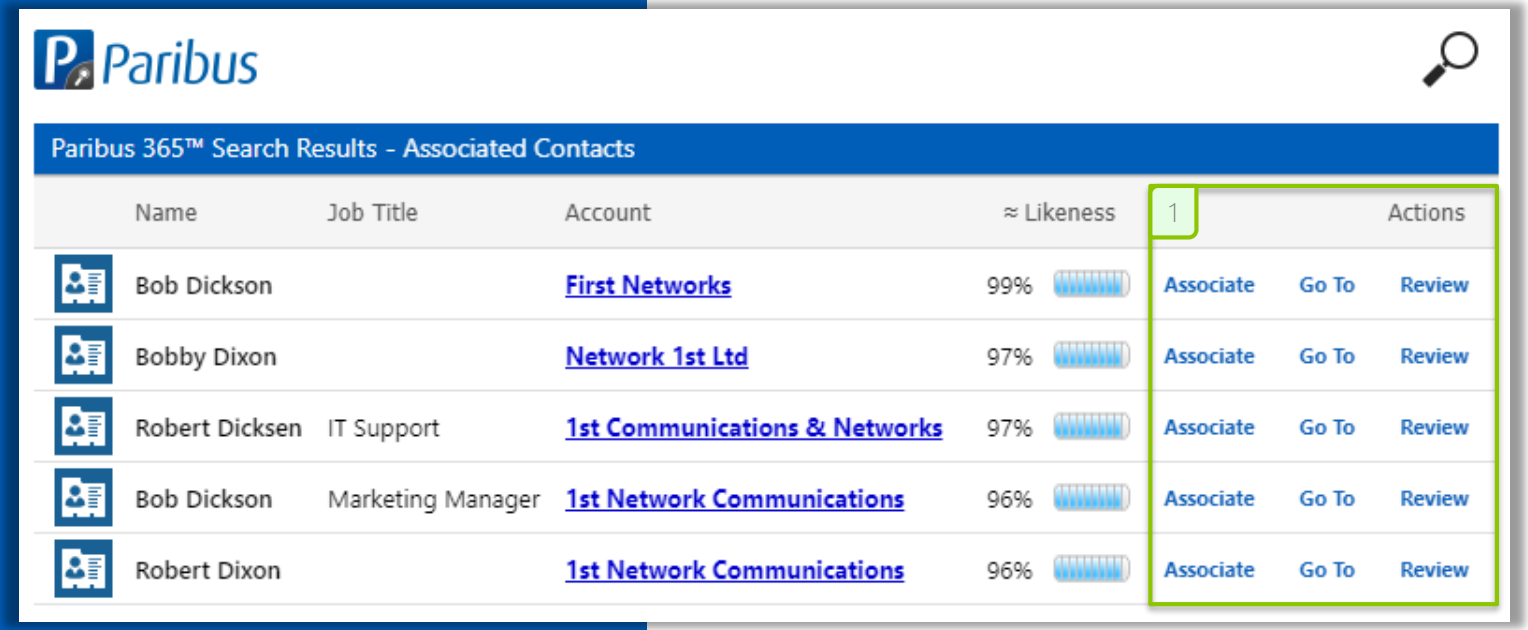

Paribus Search Results – Take Action

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

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Paribus Smart Entity Lookups

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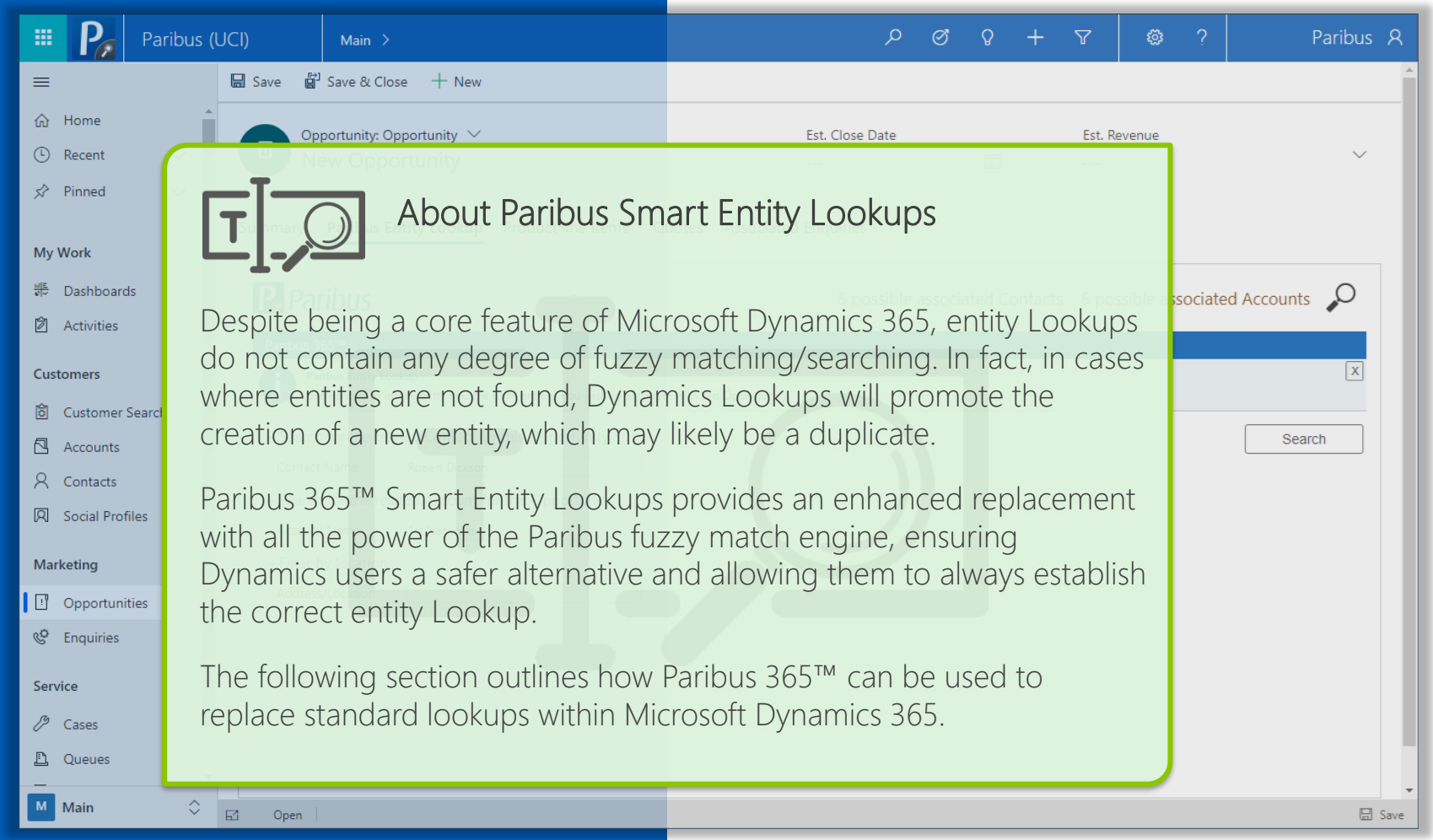

About Paribus Smart Entity Lookups

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.

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Paribus Entity Lookups

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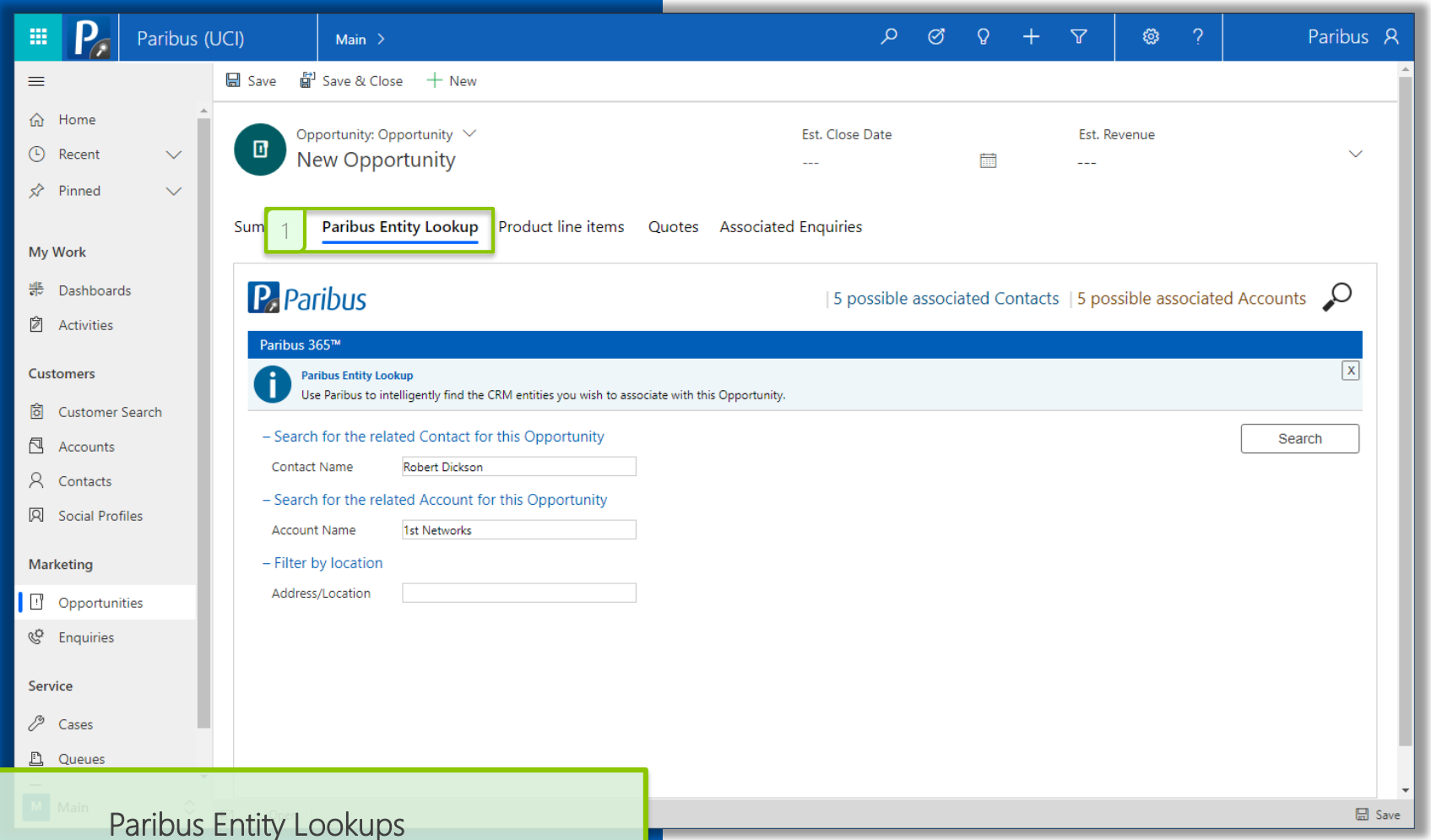

Paribus Entity Lookups

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

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Paribus Entity Lookups

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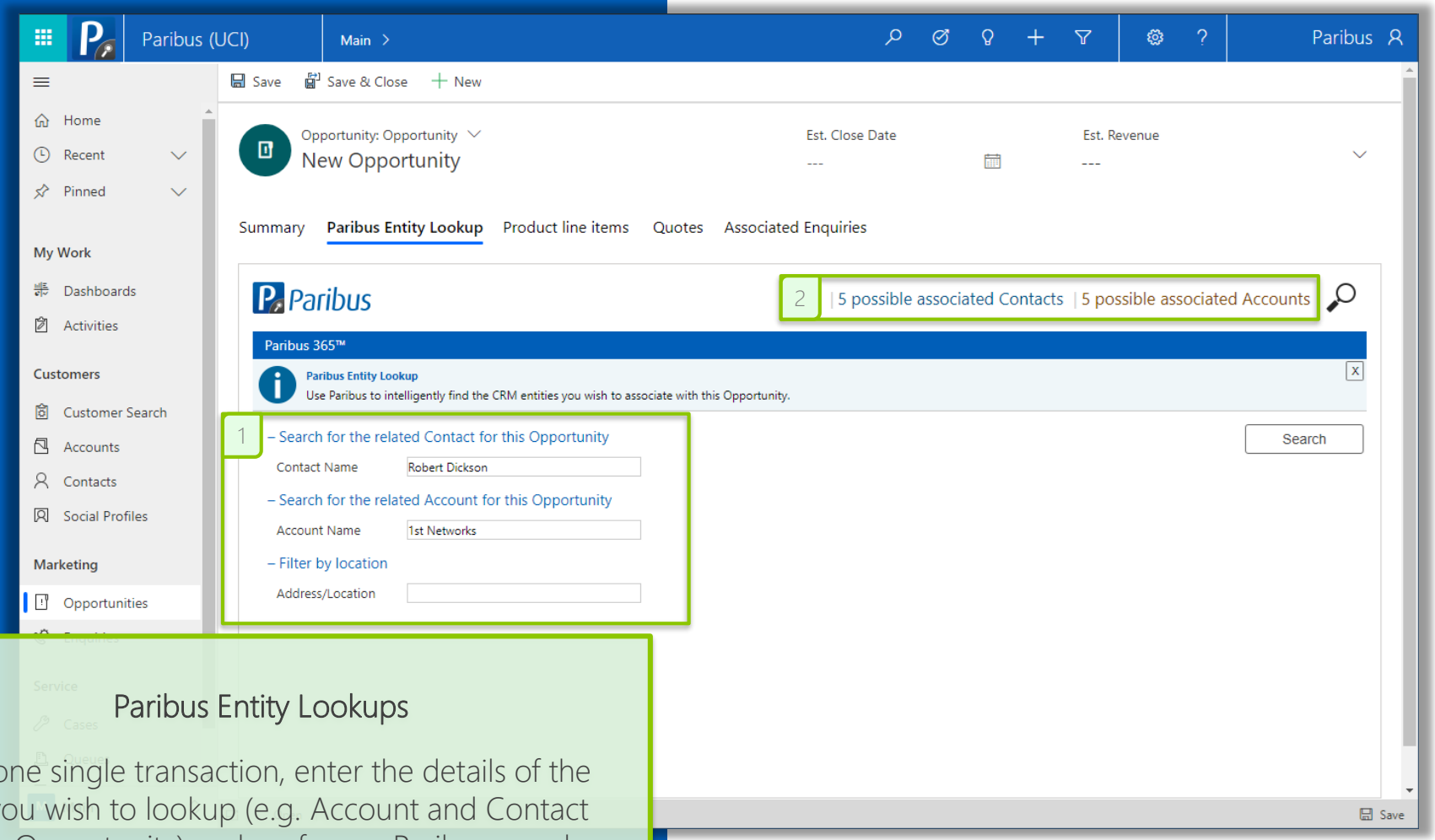

Paribus Entity Lookups

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.

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Paribus Entity Lookups

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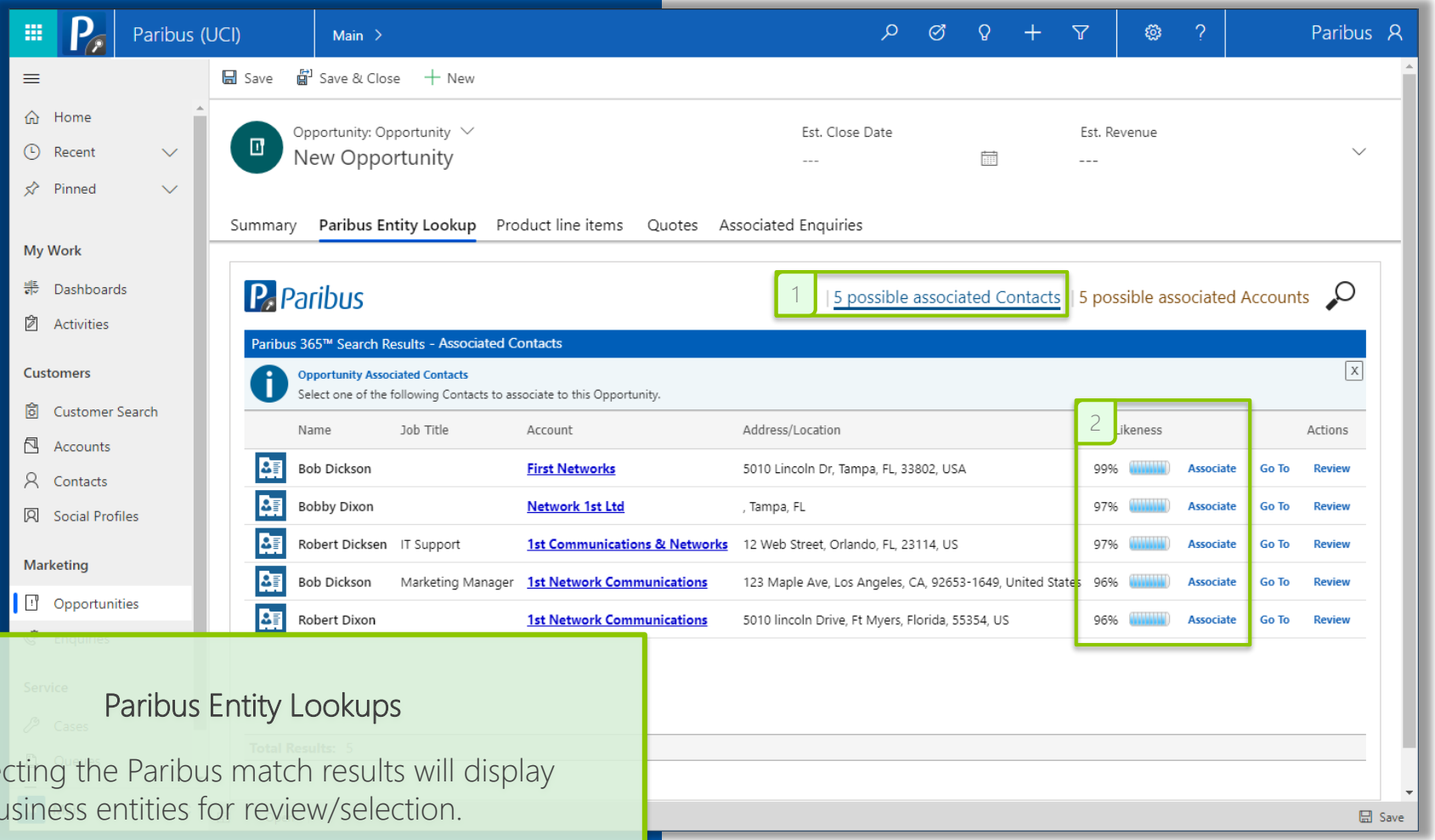

Paribus Entity Lookups

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.

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Paribus Entity Lookups

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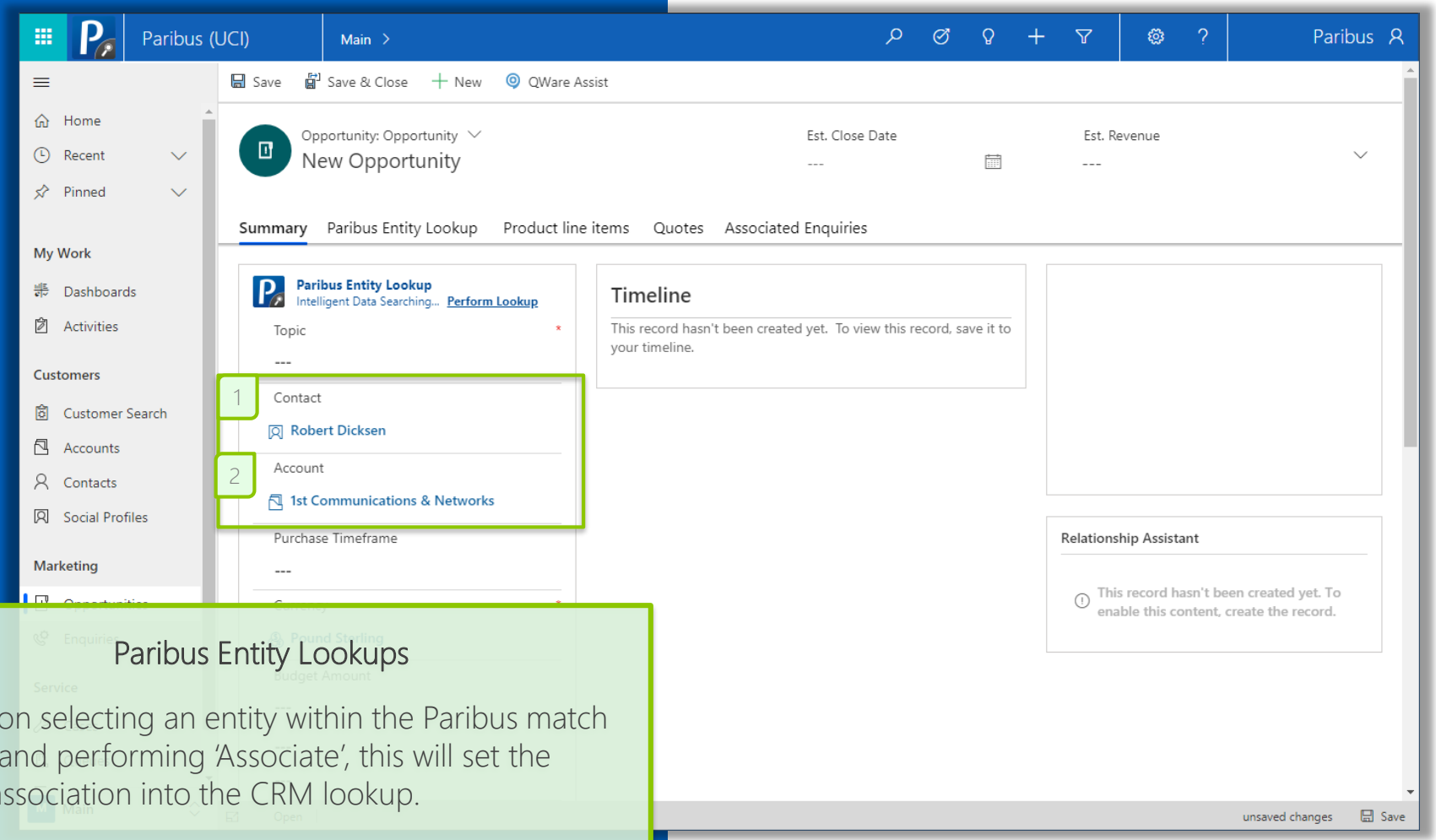

Paribus Entity Lookups

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).

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Paribus Lead Management

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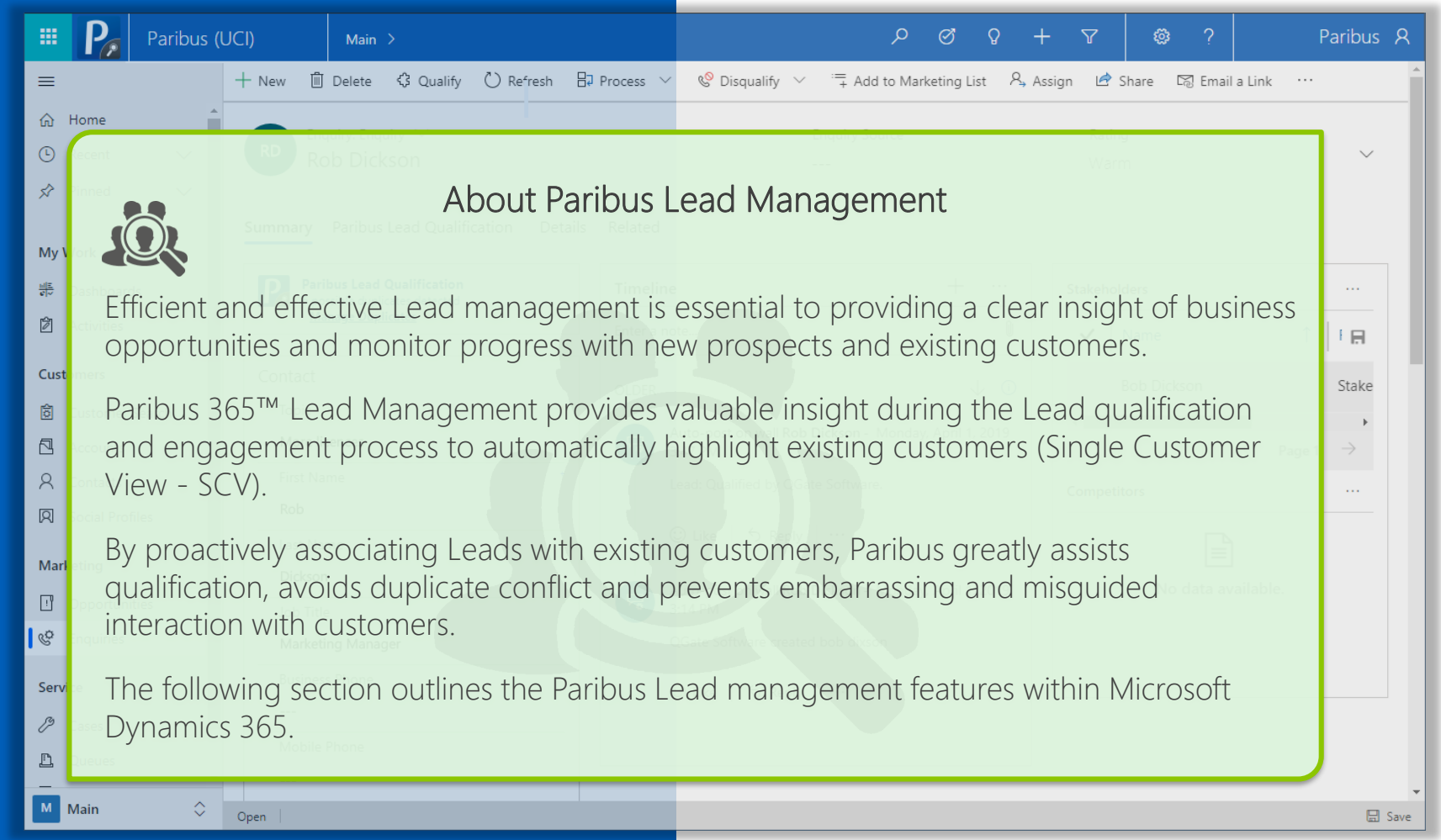

About Paribus Lead Management

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.

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Paribus Lead Management

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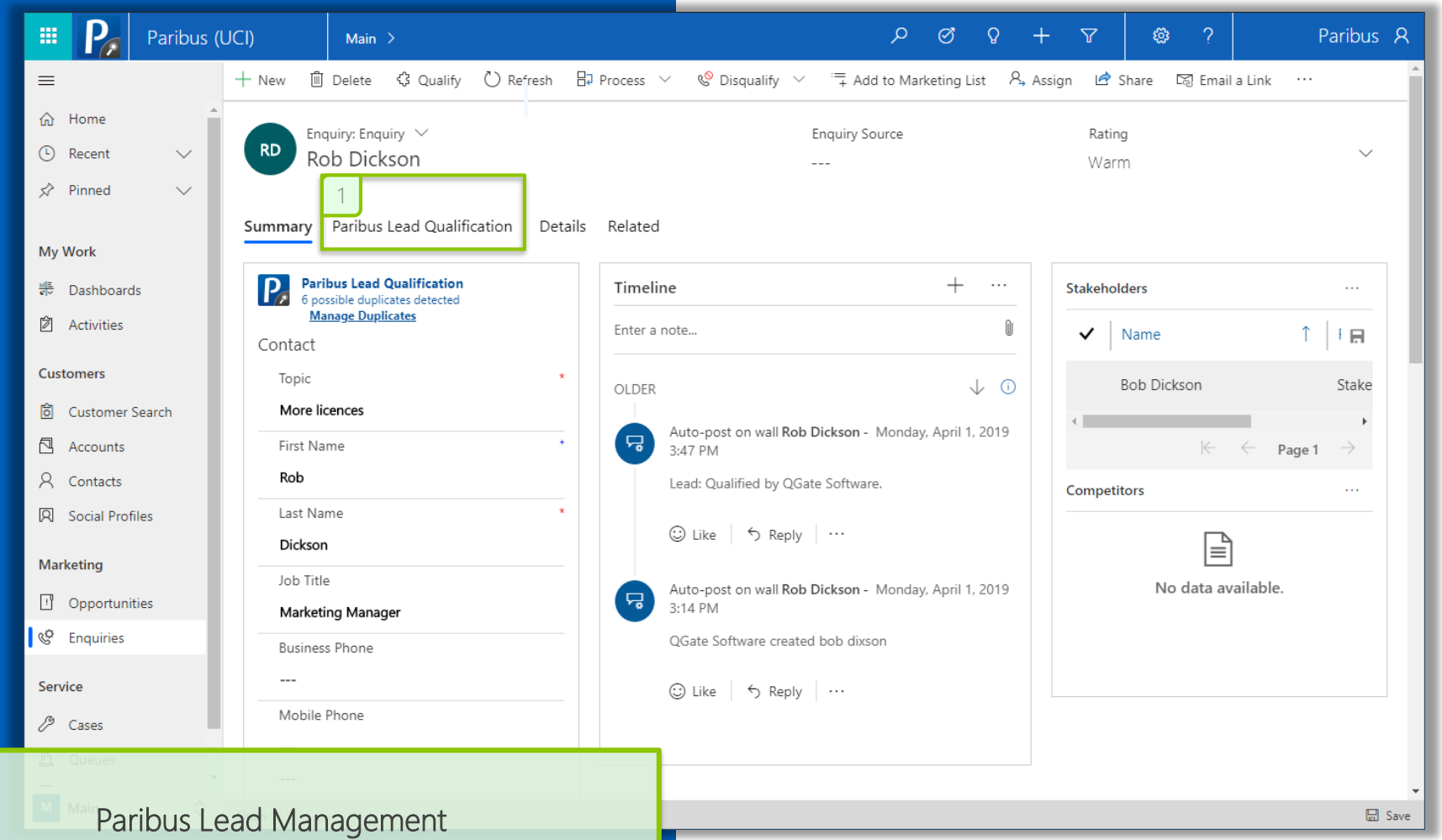

Paribus Lead Management

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

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Paribus Lead Management

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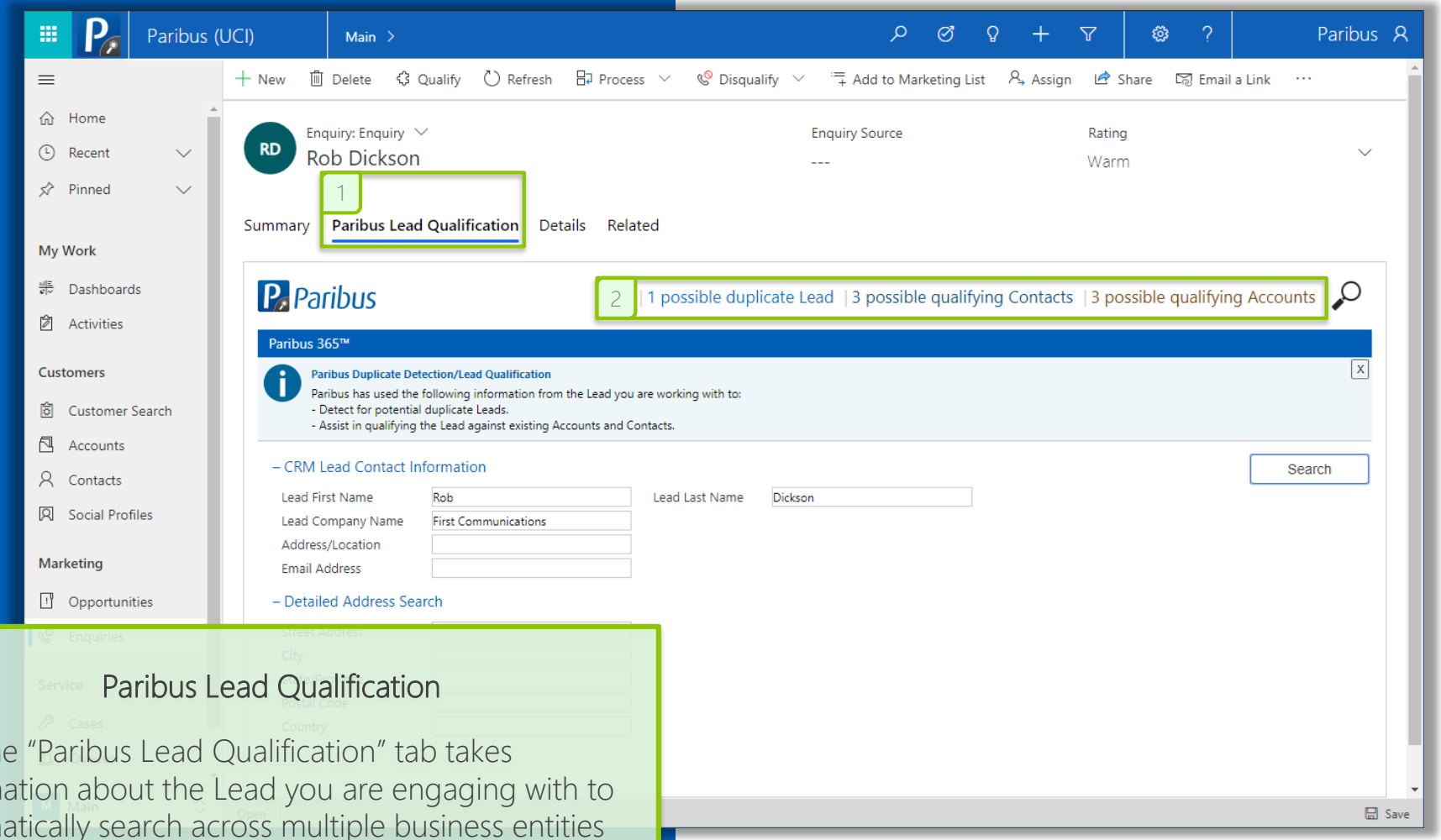

Paribus Lead Qualification

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.

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Paribus Lead Management

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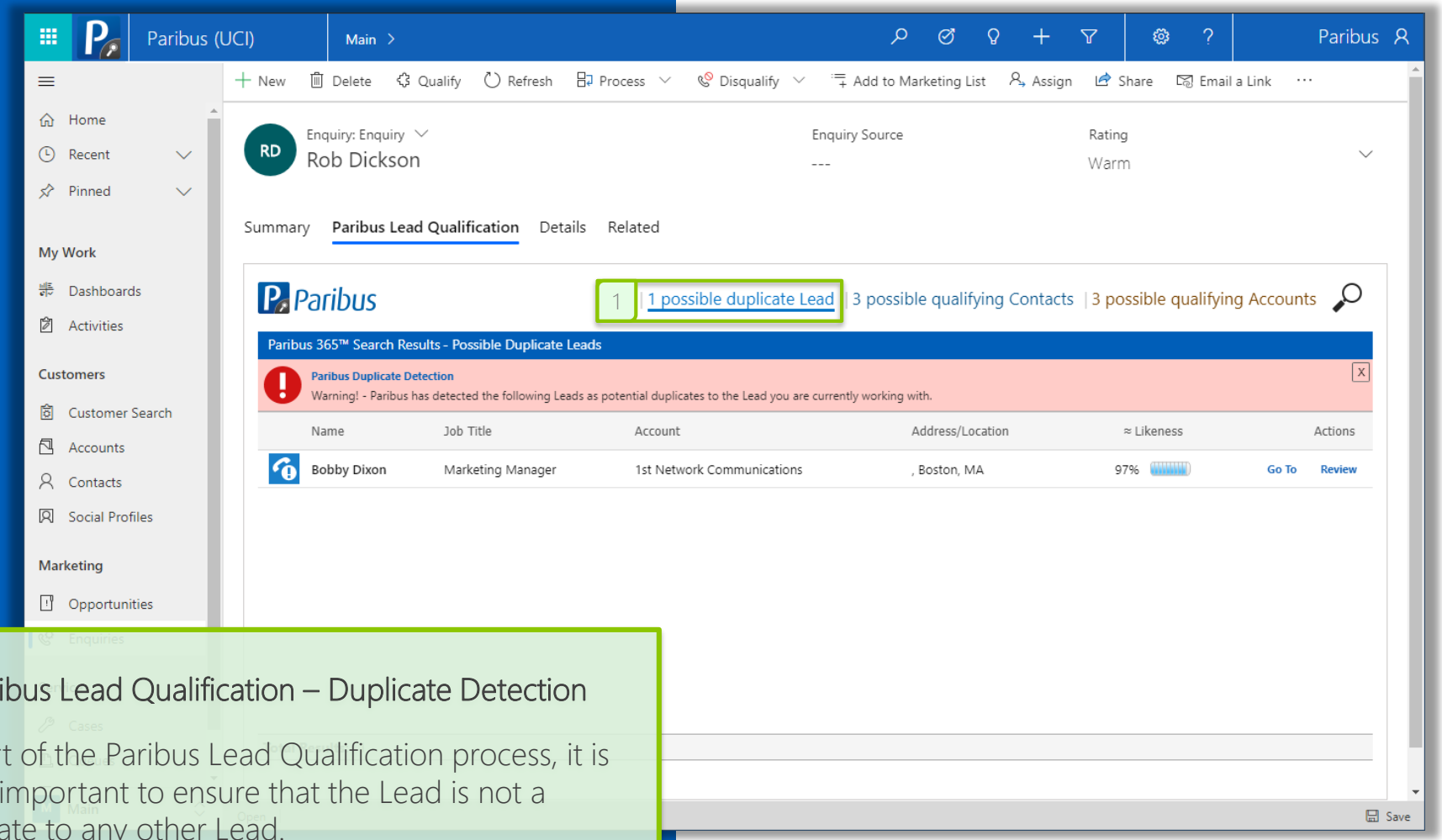

Paribus Lead Qualification – Duplicate Detection

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).

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Paribus Lead Management

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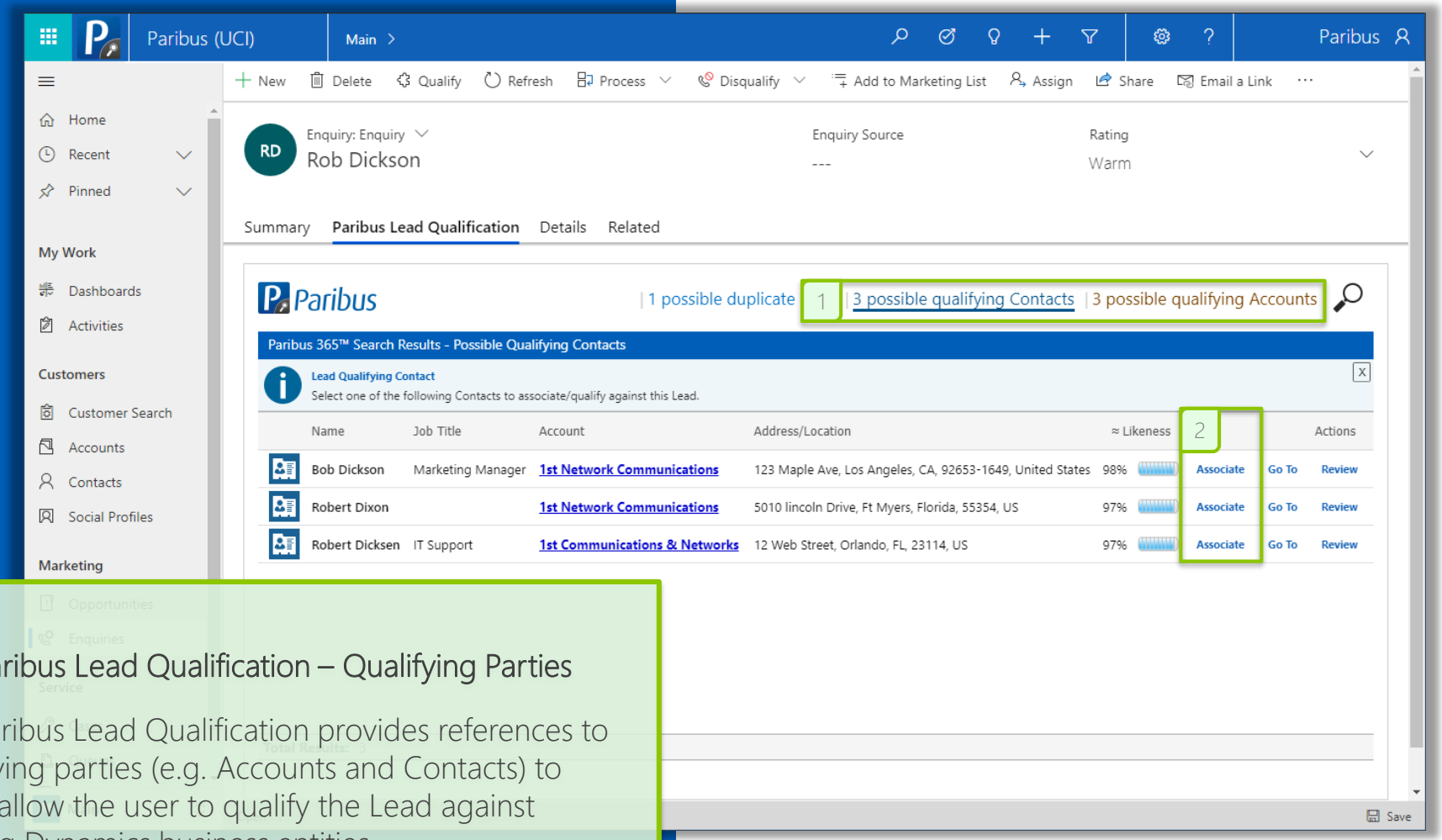

Paribus Lead Qualification – Qualifying Parties

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.

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Paribus Duplicate Prevention

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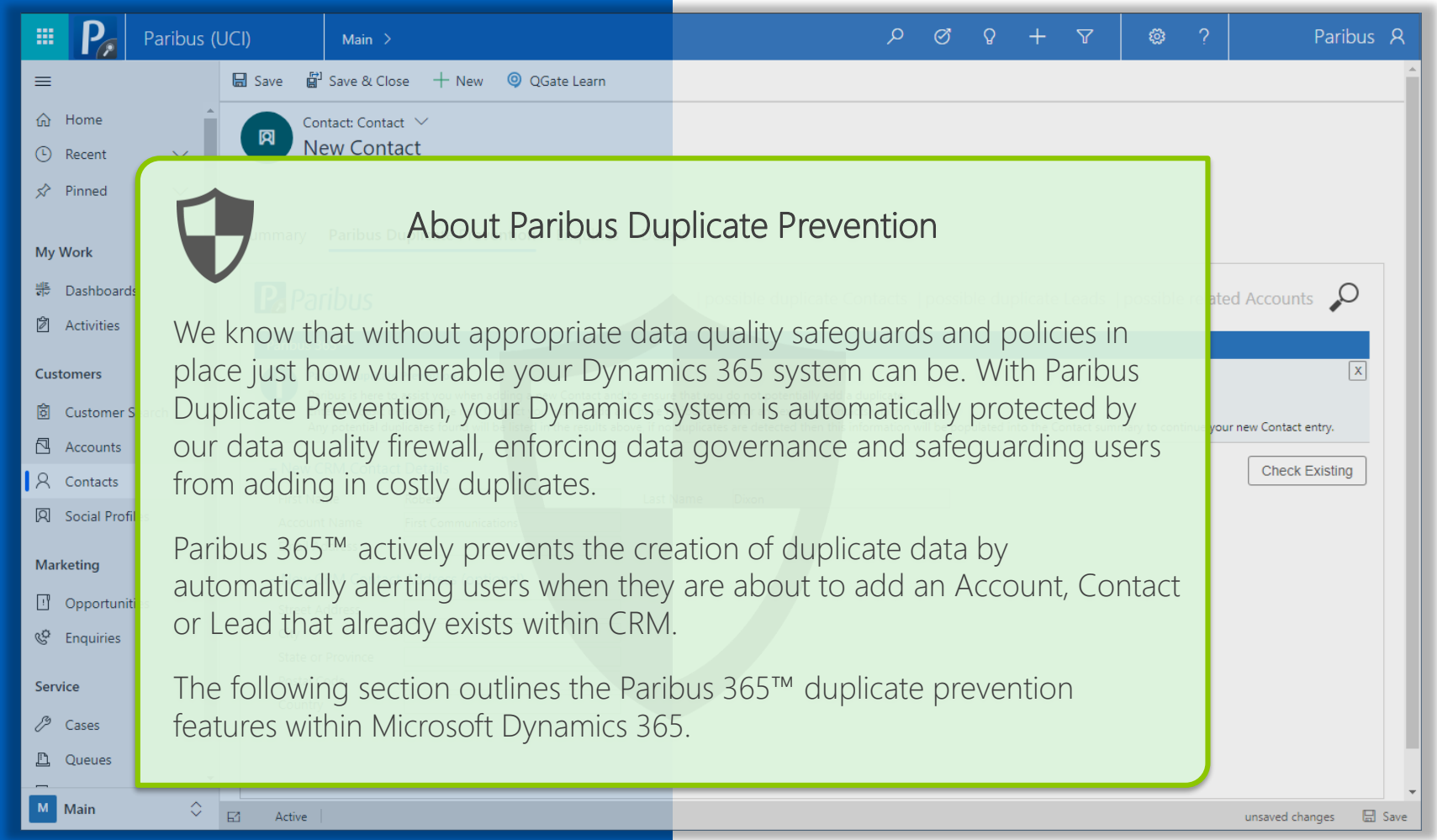

About Paribus Duplicate Prevention

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.

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Paribus Duplicate Prevention

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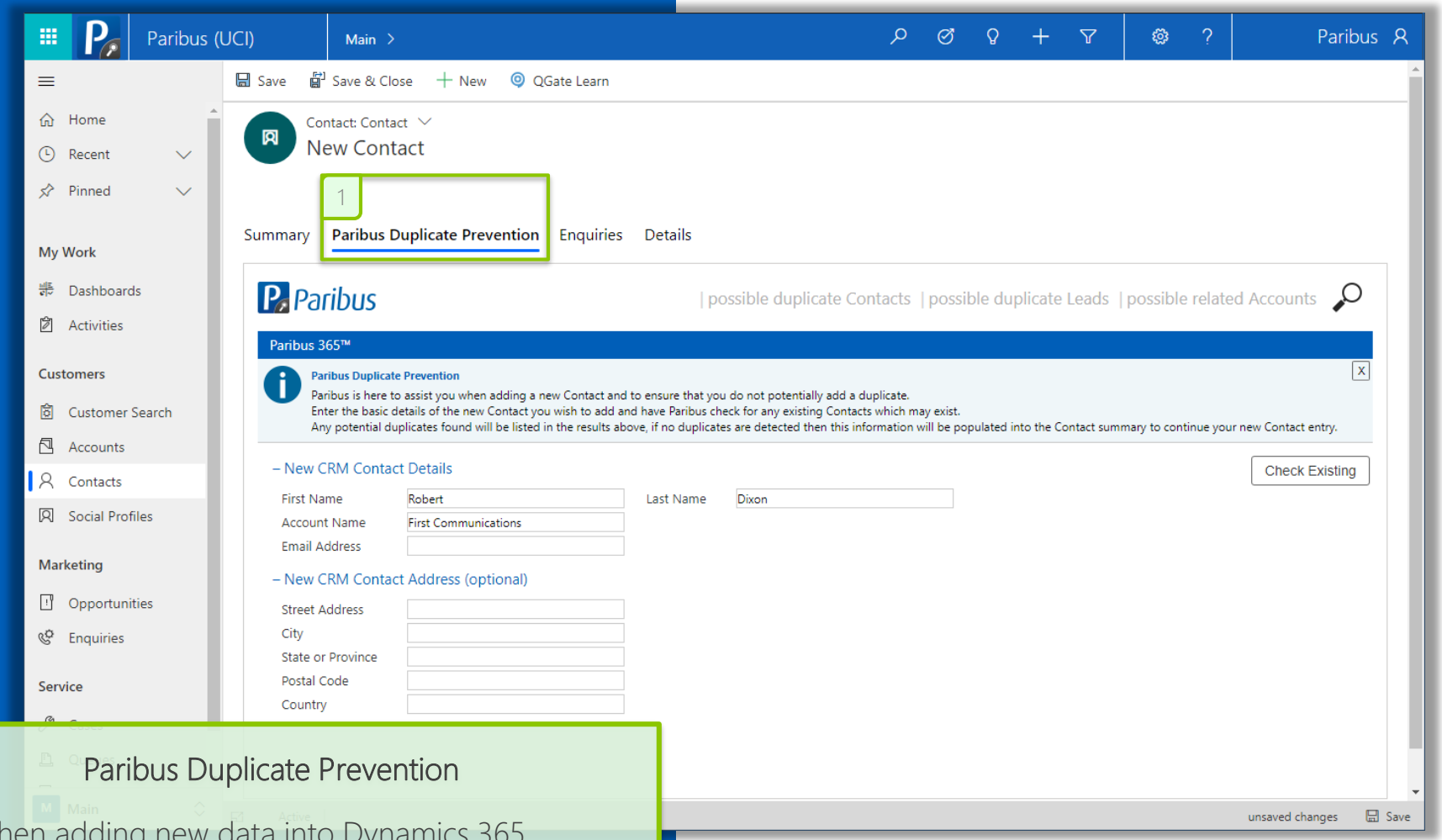

Paribus Duplicate Prevention

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.

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Paribus Duplicate Prevention

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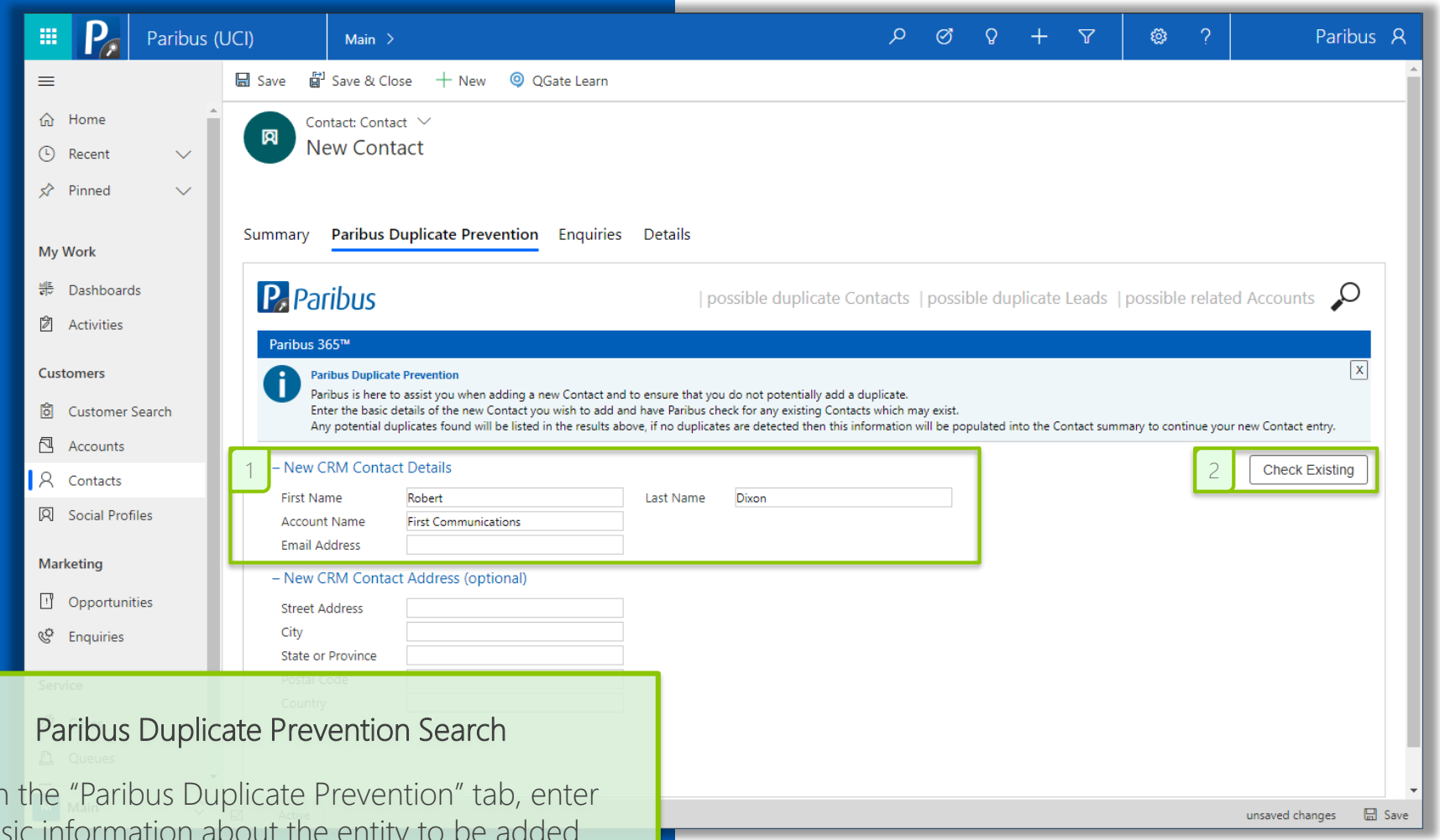

Paribus Duplicate Prevention Search

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.

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Paribus Duplicate Prevention

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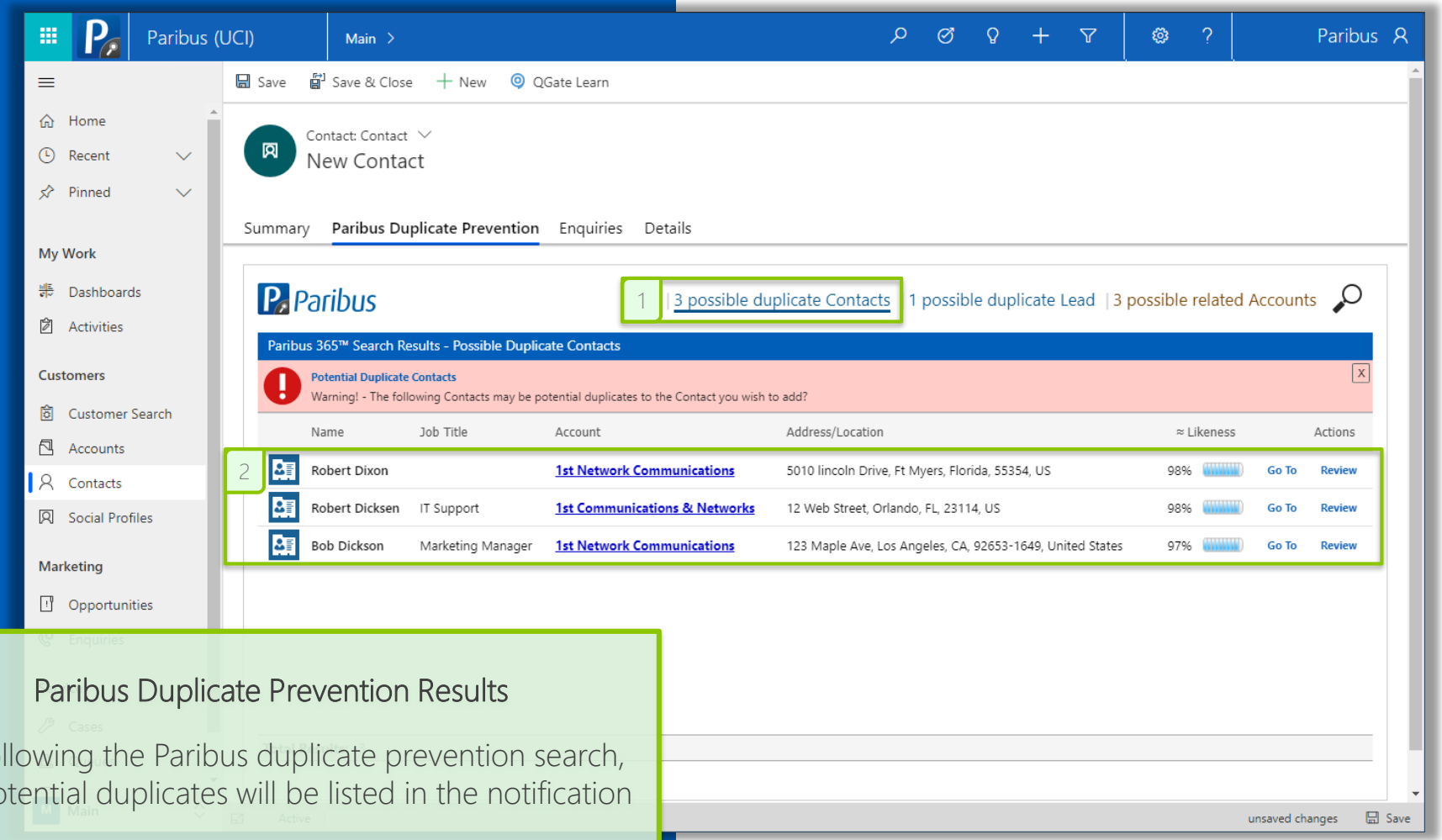

Paribus Duplicate Prevention Results

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.

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Paribus Duplicate Prevention

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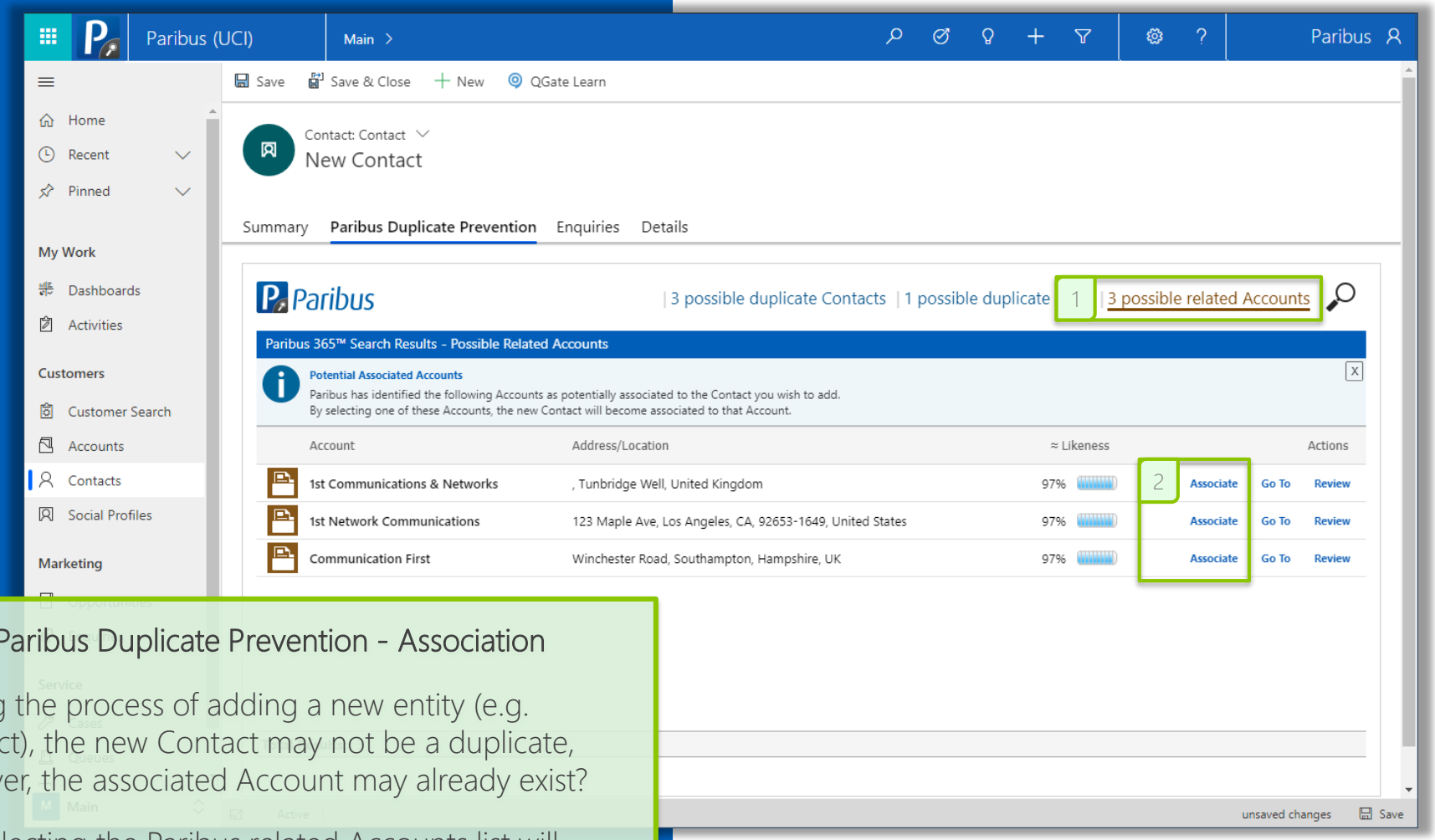

Paribus Duplicate Prevention - Association

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.

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Paribus Duplicate Prevention

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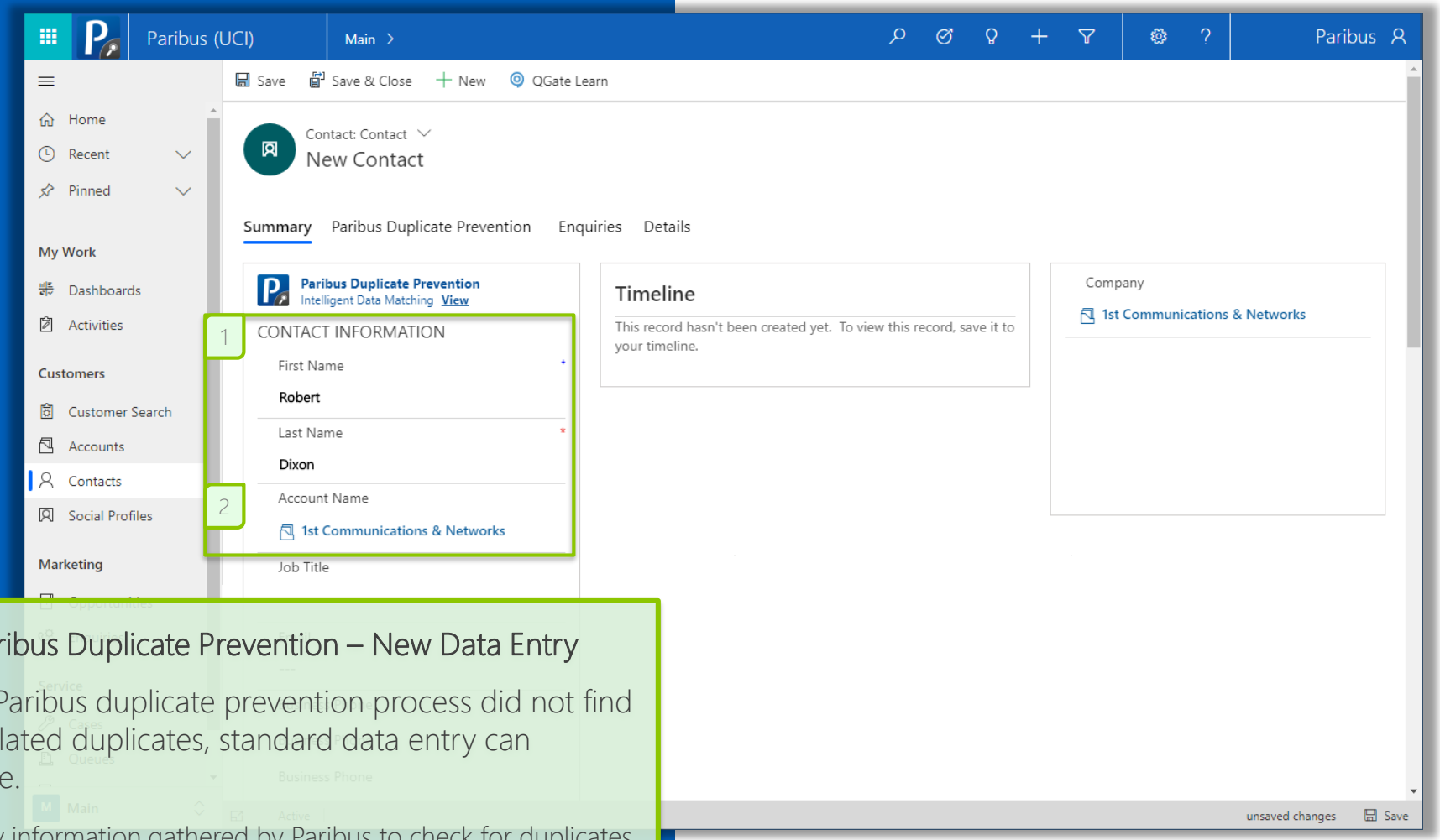

Paribus Duplicate Prevention – New Data Entry

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.

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Paribus Duplicate Detection

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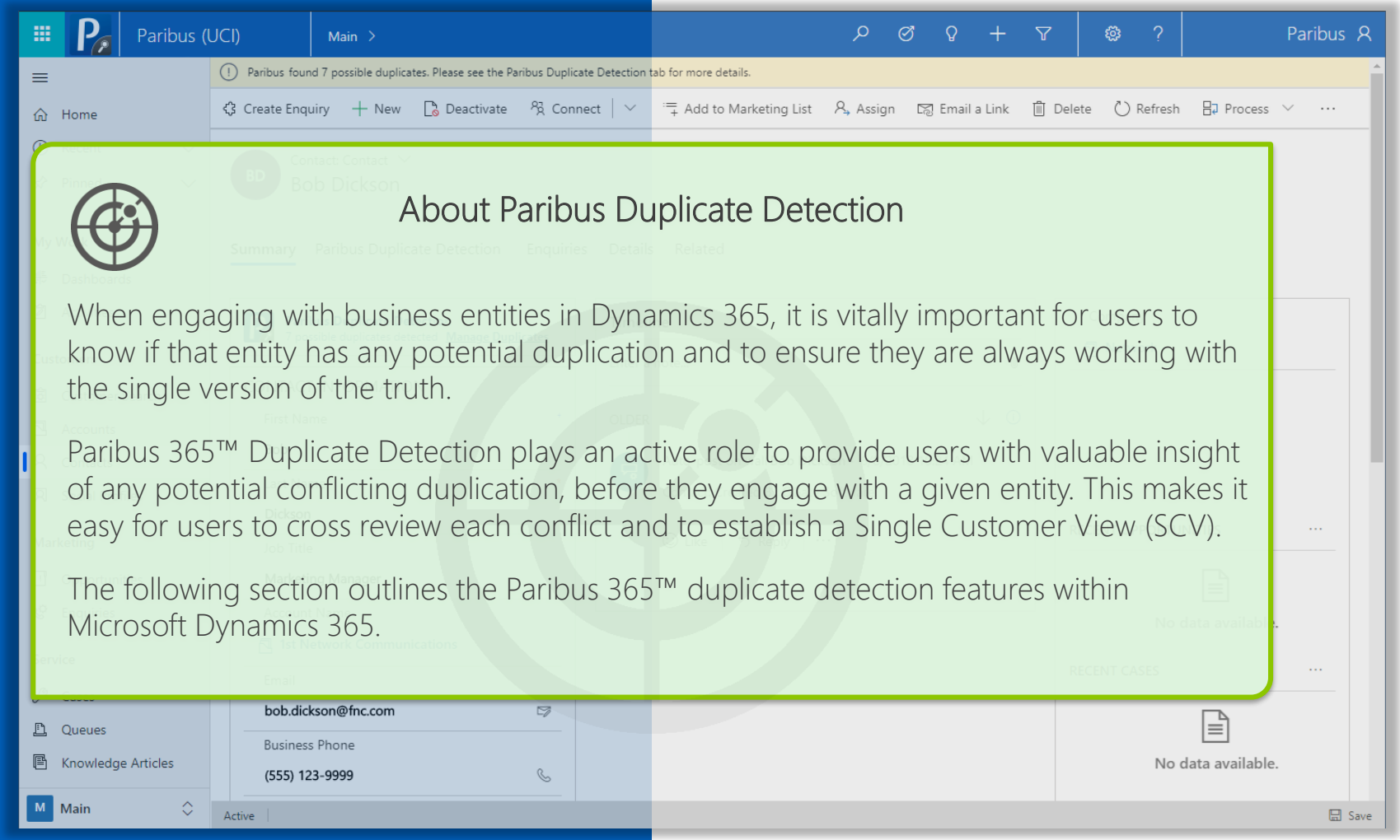

About Paribus Duplicate Detection

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 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 features within Microsoft Dynamics 365.

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Paribus Duplicate Detection

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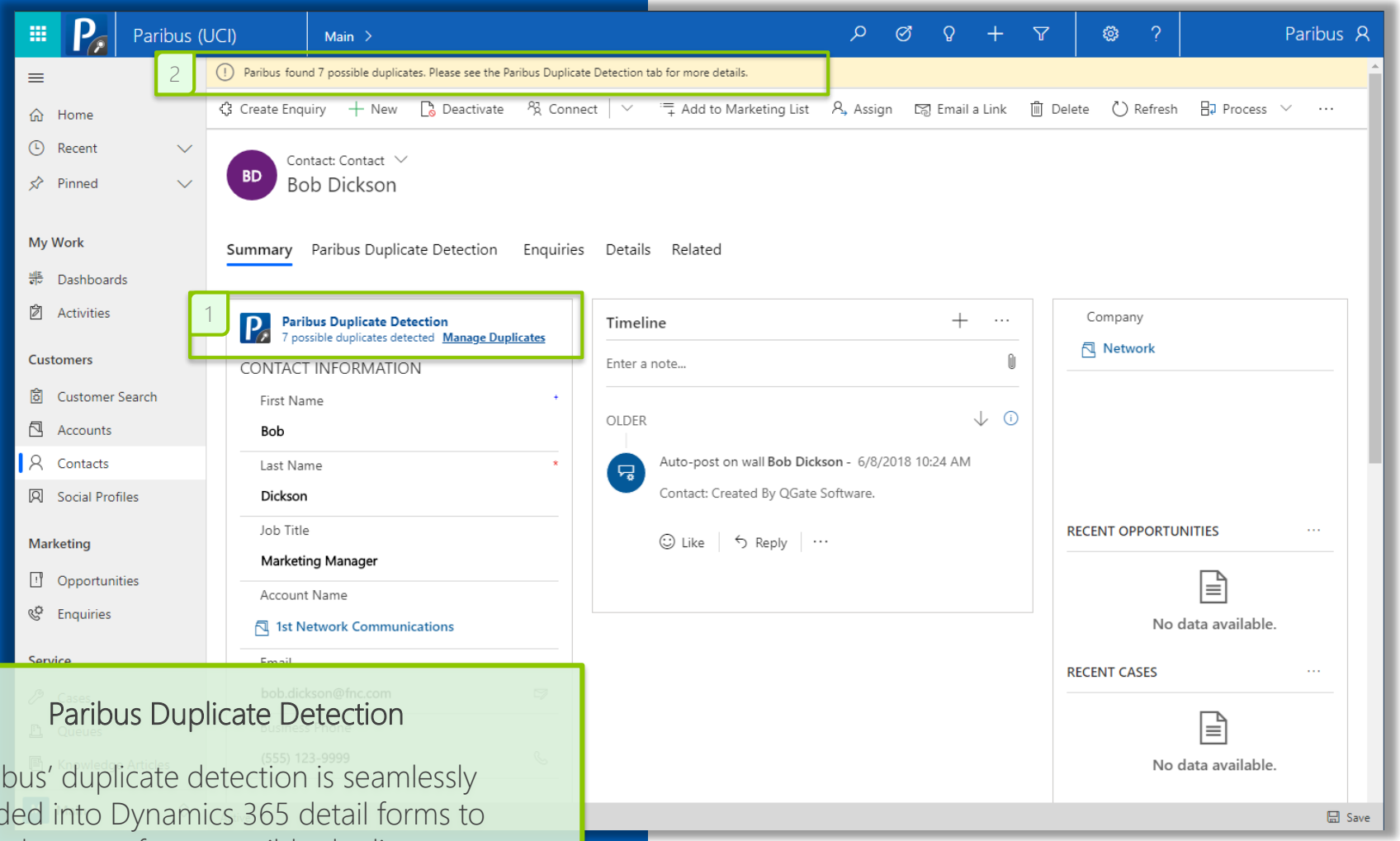

Paribus Duplicate Detection

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.

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Paribus Duplicate Detection

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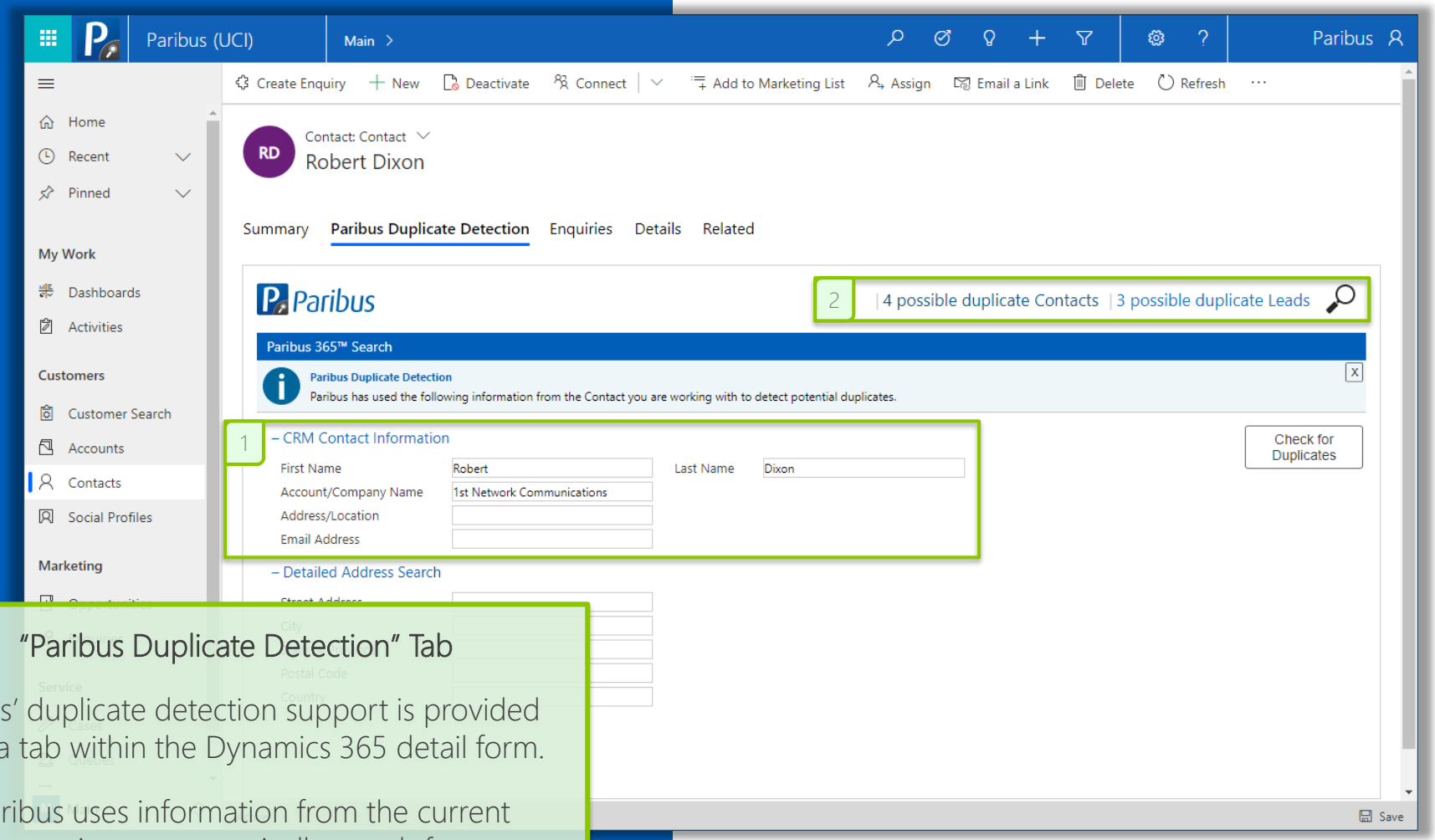

"Paribus Duplicate Detection" Tab

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.

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Paribus Duplicate Detection

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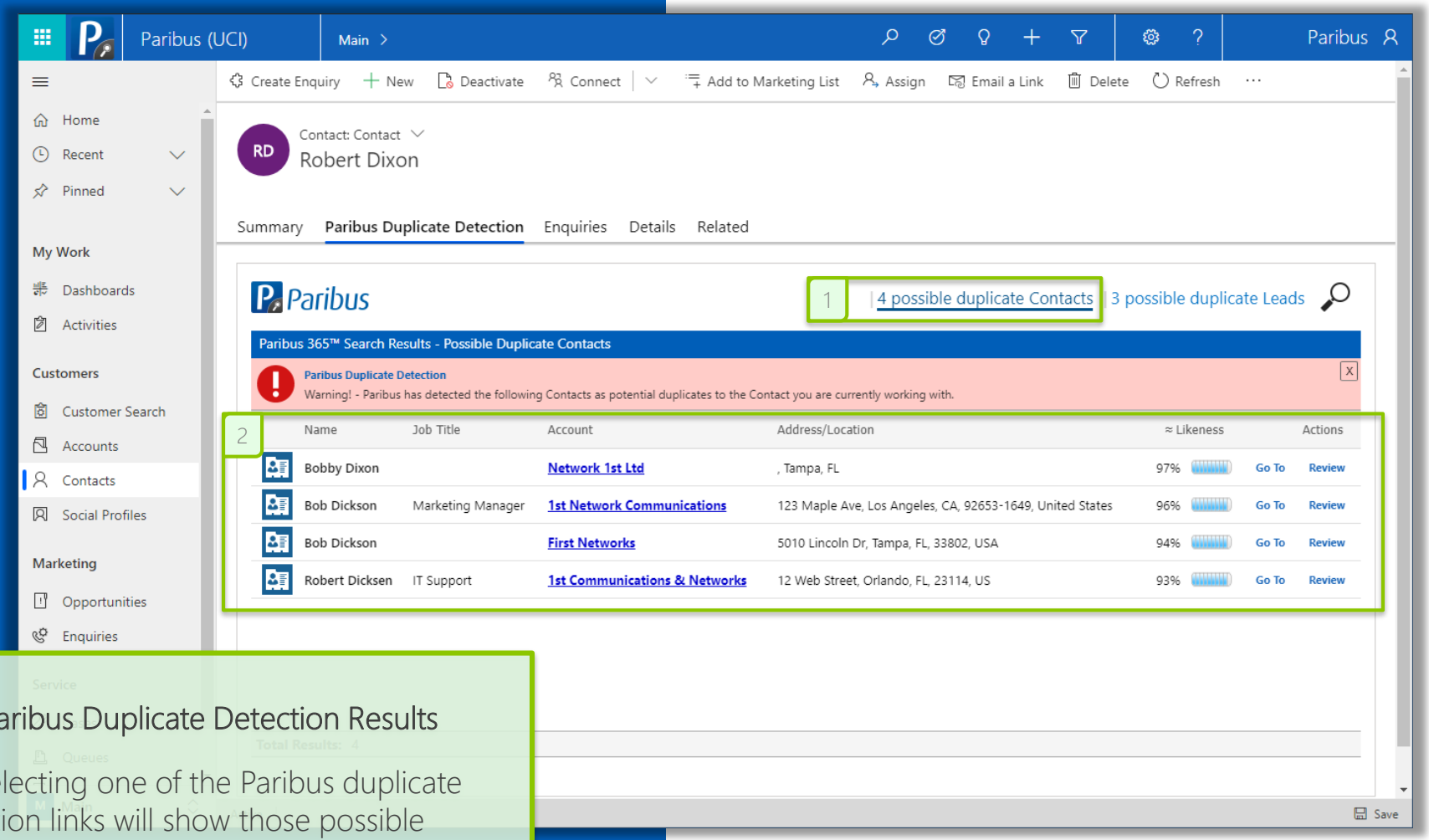

Paribus Duplicate Detection Results

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.

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About Paribus Data Cleansing

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 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.

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

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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

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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)

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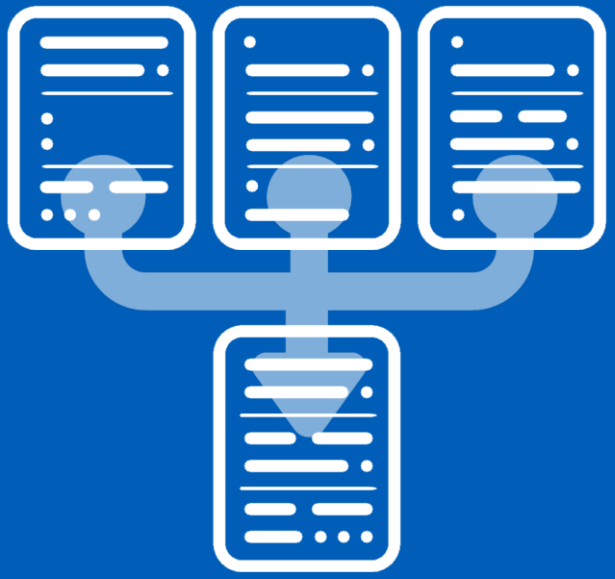

Step 3

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)

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Tour Menu

Paribus Cloud 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 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 365™

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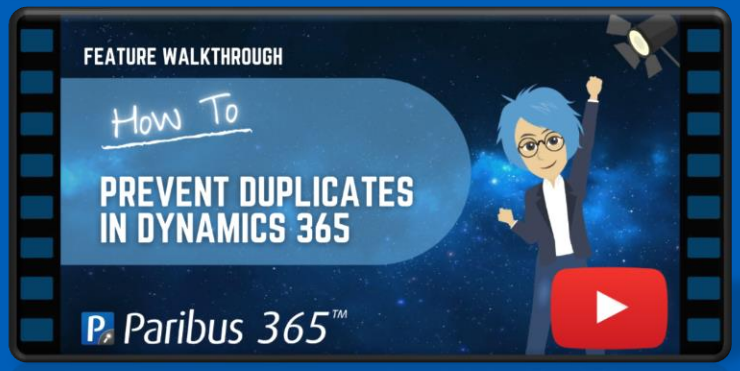
Paribus 365™ Product Videos

Tour Menu



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™

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For more information and to request your free trial of Paribus 365, contact your Microsoft Dynamics partner or local QGate business center:

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