Paribus Discovery™
for Saleslogix

Version 1.5

Paribus Discovery for Saleslogix User Guide

Document Version 1.3

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In the unlikely event that data becomes lost or corrupted, QGate Software Limited cannot be held responsible.

Recommended Safeguards

Perform a complete backup of any host database(s) to which Paribus Discovery connects to obtain match data.

Note: Paribus Discovery does not alter any data in host databases as part of the matching and review process. Changes are only made by subsequent updates / imports via Paribus Discovery Plug-in Tools.

If possible, perform any match processes or updates using live databases outside of normal operational hours.

We highly recommend that where applicable, all remote Saleslogix databases should be fully synchronised with the main host database before any updates are performed.

Table of Contents

Overview

This document is a guide to using the Paribus Discovery for Saleslogix Component Plug-in, a custom tool for managing your Saleslogix database based upon matched (duplicate) information established by the main Paribus Discovery application.

This guide outlines the following:

- About Paribus Discovery for Saleslogix
- Setting up and installing the Paribus Discovery for Saleslogix components
- Identifying Matching Data in Saleslogix
- Reviewing your Saleslogix Match Results
- Processing Duplicate Saleslogix Records
- Auditing your Duplicate Saleslogix Results

Other Related Information

For information on installing and configuring the main Paribus Discovery application, see the Paribus Discovery Getting Started Guide.

For further information on using the Paribus Discovery application, see the Paribus Discovery product online help.

For additional reference information on Paribus Discovery, see the QGate KnowledgeBase at http://www.QGate.co.uk/knowledge/paribus-discovery

For up to date information on Paribus Discovery and other QGate products, please visit the QGate Software website at www.QGate.co.uk.

About Paribus Discovery for Saleslogix

Paribus Discovery for Saleslogix is an extension of the main Paribus Discovery application, providing custom integration with the CRM database application – Saleslogix.

Contained within the main Paribus Discovery application, the Saleslogix integration provides direct access to your Saleslogix database for the processing of duplicate Saleslogix Accounts and Contacts identified by a Paribus Discovery matching process.

This integration includes:

Pre-defined Set of Paribus Match Definitions

Paribus Discovery Match Definitions are used in the Paribus Discovery matching processes to identify matching information (i.e. duplicate Accounts/Contacts).

A pre-defined set of Paribus Match Definitions, mapping to all the major data entities of a Saleslogix database model, are provided with the Paribus Discovery for Saleslogix integration.

These entities include:

- Accounts
- Contacts
- Addresses
- Telephone Numbers
- Websites and email Addresses
- Regions, Industries, Divisions, Territories

Furthermore, the Paribus application provides the ability to customise and/or add additional definitions as required.

Custom Component Plug-in for Reviewing Matches

Once Paribus has identified matching information (e.g. duplicate Accounts and/or Contacts) within your Saleslogix database, the Paribus Match Review process enables you to view and manage the matches (duplicates) found.

Whilst reviewing the matches (duplicates) found in your Saleslogix database, the Paribus Discovery for Saleslogix Component Plug-in provides the following custom features to assist in analysing a group of duplicates.

Saleslogix Duplicate Group Report

The Saleslogix Duplicate Group Report provides a detailed illustration of a group of duplicate Accounts or Contacts. The reports details related Addresses, Contacts, Opportunities and Activities.

This report greatly assists the reviewer in deciding the nature of the duplicate records, and denoting which Accounts/Contacts to keep and/or remove (Master/Duplicate).

Show Group in Saleslogix

The Show Group in Saleslogix option provides the ability to show the current group of duplicate Accounts or Contacts within the Saleslogix Sales Client.

This enables the reviewer to use the full power of the Saleslogix Sales Client to navigate around the list of duplicate Accounts and/or Contacts, to denote which Accounts/Contacts to keep and/or remove (Master/Duplicate).

Furthermore, with the ability to manage the group of duplicates from within the Saleslogix Sales Client, enables the reviewer to fully manage the relationships between them (i.e. create Associations).

Custom Component Plug-in for Processing Duplicates

Once Paribus Discovery has identified matching information (e.g. duplicate Accounts and/or Contacts) within your Saleslogix database, the Paribus Discovery for Saleslogix Custom Component provides a complete data management facility for processing duplicate records.

Duplicate Account/Contact Reports

Before processing your duplicate Saleslogix Account and Contacts, the Component Plug-in provides a detailed report on each of the Match Groups and the duplicate members within each group.

These reports provide an illustration of the duplicate data, prior to performing an update.

Processing/Removal of Duplicate Records

The processing of duplicate records is provided for both Saleslogix Accounts and Contacts, and includes the following features:

- Keep (hide) duplicate Accounts/Contacts.
- Create Associations between duplicates (if keeping them).
- Remove duplicate Accounts/Contacts.
- Reassign (consolidate) all related information (i.e. Contacts, Opportunities, Activities, History etc) from duplicate records over to a nominated master record.

  (**Note**: this feature is based dynamically upon your Saleslogix data-model, including any custom database tables).
- All database updates are fully synchronised.
- All updates support the Saleslogix security model
- All database updates are fully recorded in an audit report.

Pre-Requisites

This section outlines the elements required to set-up and use the Paribus Discovery for Saleslogix Component Plug-in with your installation of Saleslogix.

Client Workstation

- Installation of the main Paribus Discovery Application
  (see the Paribus Discovery Getting Started Guide)
- Saleslogix Client installation, including:
  - Saleslogix Sales Client
    (optionally required during the Match Review process)
  - Saleslogix Administration module
    (required for applying the Paribus Discovery for Saleslogix Bundle)
  - Saleslogix OLE DB Provider (Saleslogix version 6 and 7 only)

Paribus Discovery for Saleslogix – System Requirements

For an up to date outline of the system requirements for running Paribus Discovery and integration with Saleslogix, include a list of supported versions of Saleslogix – please see the Paribus Discovery System Requirements section of the QGate Knowledgebase at http://www.qgate.co.uk/knowledge/paribus-discovery/sysreqs

Note: Paribus Discovery support for Saleslogix version 5 (legacy) was removed in version 1.3.4 of Paribus Discovery.

Setting up Paribus Discovery for Saleslogix

This section outlines the steps required to set-up and configure your installation of Paribus and the Paribus Discovery for Saleslogix Component Plug-in.

- Step 1: Installing the Paribus Discovery for Saleslogix LAN Bundle
- Step 2: Installing the Paribus Discovery for Saleslogix Web Bundle
- Step 3: Defining a Paribus Data Provider for Saleslogix
- Step 4: Importing Saleslogix Match Definitions
- Step 5: Testing Your Set-up
- Step 6: Installing Your Paribus Discovery for Saleslogix Component Licence
- Step 7: Enabling the Paribus Discovery for Saleslogix Plug-in

Important Note

Ensure you have successfully completed the steps outlined within this section before attempting to action any of the options available from the Paribus Discovery for Saleslogix Component Plug-in.

Step 1: Installing the Paribus Discovery for Saleslogix LAN Bundle

The first step is to install the Paribus Discovery for Saleslogix (LAN) Bundle, into your Saleslogix database. The Bundle provides additional components to your Saleslogix database, that the Paribus Discovery for Saleslogix component uses during the processing of duplicates.

Note: Without the Bundle applied, the Paribus Discovery for Saleslogix Component will not operate.

Bundle Content

The Bundle provides the following components:

Type	Saleslogix Plug-in Name	Description/Purpose
Table	QGMCH_SYSTEM	Stores Paribus plug-in information.
Table	QGMCH_SETTINGS	Stores general settings for the component plug-in.
Table	QGMCH_SESSIONS	Stores the definition of cleansing sessions.
Table	QGMCH_SLX_RESULT	Stores audit information against Accounts/Contacts about their involvement in a Paribus cleansing process.
Table	QGMCH_SLXREASSIGNMENT	Stores the list of merge rules for your Saleslogix database, used during the data merging process.
Table	QGMCH_MERGEDATA	Stores merge data from 1-to-1 merging, which could not with master records (Merge Data Repository).
Table	QGMCH_MERGECLASSES	Stores a list of merge classes used by the component plug-in.
Table	QGMCH_ENTITYLOG	Stores a reference to processed Accounts and Contacts together with attributes for post processing.
Table	QGMCH_AUDITORREPORTS	Paribus Auditor: Stores audit information about audit reports.

Table	QGMCH_AUDITORGROUPS	Paribus Auditor: Stores audit information about processed groups.
Table	QGMCH_AUDITORMEMBERS	Paribus Auditor: Stores audit information about processed members (Accounts/Contacts).
Table	QGMCH_AUDITORTRANSACT	Paribus Auditor: Stores audit information about transactions (future use).
Table	QGMCH_DETAIL	Stores audit history of cleansing session processing (detail information).
View	Paribus Account Audit Results	Provides an Account view of the Audit data.

Type	Saleslogix Plug-in Name	Description/Purpose
View	Paribus Contact Audit Results	Provides a Contact view of the Audit data.
Form	Account: Paribus Account Merge Data Repository	Provides a view of the Account Merge Data (Merge Data Repository). (Saleslogix version 6 only)
Form	Contact: Paribus Contact Merge Data Repository	Provides a view of the Contact Merge Data (Merge Data Repository). (Saleslogix version 6 only)
Form	Paribus Merge Data	Account/Contact Management window on the Data Repository. (Saleslogix version 6 only)
Script	QGMCH_ParibusAccountResult_Goto	Script used by the views to provide drill around (go to) of associated Account records.
Script	QGMCH_ParibusContactResult_Goto	Script used by the views to provide drill around (go to) of associated Contact records.
Group	Account: Paribus Dupe Contacts	Query to display duplicate Contacts after an Account merge process has taken place.
Group	Account: Paribus Dupe Accounts	Query to display duplicate Accounts after an Account merge process has taken place.
Group	Contact: Paribus Dupe Contacts	Query to display duplicate Contacts after a Contact merge process has taken place.

The Bundle File(s)

The Bundle file(s) should be located on your Paribus Installation Package, under **Application Support\Saleslogix\LAN Bundles**, or alternatively supplied directly by your Paribus software supplier or Saleslogix Business Partner.

Saleslogix Version	Bundle Name
Version 6 and above	**Paribus Discovery for Saleslogix (v1.5.0).sxb**

Installing the Bundle

Using the Saleslogix Administration Module, apply the Paribus Discovery for Saleslogix Bundle in the normal way. For assistance in installing and applying Bundles, see the Saleslogix product documentation.

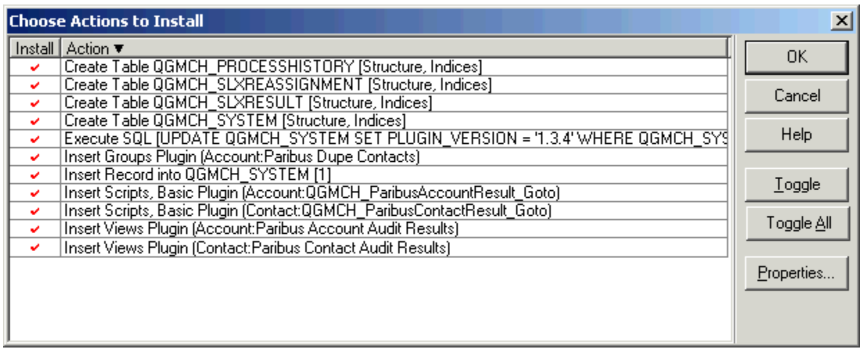


Figure 1 - Saleslogix Bundle Install Window

When applying the Paribus Discovery for Saleslogix Bundle, ensure all items are selected to install (including upgrades).

When prompted to release the Bundle, we recommend releasing to **Everyone**, to ensure that all users have access to the various audit information relating to Accounts and Contacts that have been affected by a Paribus cleansing process.

Bundle Compatibility

The Paribus Discovery for Saleslogix component requires the correct bundle version to be applied to your Saleslogix database. The component will present a warning if the incorrect bundle is not applied and suggest an upgrade be performed.

Upgrading an Existing Bundle

If you have a previous version of the Paribus Discovery for Saleslogix bundle installed, you will need to upgrade this to the latest bundle provided. Upgrading should be achieved using the Upgrade Bundle option within the Saleslogix Administration Module.

Step 2: Installing the Paribus Discovery for Saleslogix Web Bundle

Note: The steps in this section are not required if you are only installing Paribus for the Saleslogix LAN Client.

In order to provide access to Paribus data (Paribus Merge Repository, Paribus Audit, etc) in Saleslogix Web, you will need to install the accompanying web bundle. The web bundle can be found in your Paribus Installation Package, under the **Application Support\Saleslogix\Web Bundles** directory.

Installing the bundle

The following instructions assume that you are familiar with the Saleslogix Application Architect. At the least, you should check the following items before applying the bundle and making other changes:

- Make sure you have a recent backup of your database.
- Make sure that you are using the correct project within Application Architect.
- Make sure that the Application Architect project is an up-to-date reflection of your web site. Preferably the existing web site should have been built from the project you are about to use.

Once you are happy that you have the correct environment ready, proceed as follows:

Copy the web bundle (**Paribus Discovery for Saleslogix Web.zip)** from your Paribus Installation Package into the root of you C drive (or somewhere else that has a short path name). Saleslogix Application Architect will not be able to process the bundle if the path name is too long.

Open up the **Saleslogix Application Architect** and select the web project.

1) Right-click the root of the tree in the Project Explorer and select to **Install Bundle**.

2) Navigate to the **Paribus Discovery for Saleslogix Web.zip** bundle and click the **Open** button.

3) Follow the instructions on screen to complete the bundle installation.

Upgrading an Existing Bundle

If you have a previous version of the Paribus Discovery for Saleslogix web bundle installed, you will need to upgrade this to the latest bundle provided. Upgrading should be achieved the same way the step above.

Build and deploy your Saleslogix web site

Once the bundle has finished installing, build and deploy your Saleslogix web site according to your normal internal procedures.

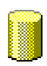
Step 3: Defining a Paribus Data Provider for Saleslogix

To enable Paribus to match the data contained within your Saleslogix database, you must define the source of that data. This is achieved by defining a Paribus Data Provider.

Important Note: The Saleslogix database defined within your Data Provider must be a Saleslogix Host Database. This ensures the content of the database is complete.

Firstly, start your installation of Paribus from the application icon, and log into the Paribus Control database your created during the installation of Paribus. If you have not yet achieved this step, see the *Paribus Getting Started Guide* to established how.

If greeted with a welcome screen offering the ability to Import Paribus Definitions or Define Paribus Definitions Manually, select **Define Manually**.



Data Providers

From the main Paribus application screen, select (left-click) the Data Providers icon in the left-hand navigation bar.

This will display a list of existing providers. Right-click the icon, and select **New Data Provider…** from the popup menu.

This action will display the **Configure Data Provider** dialog.

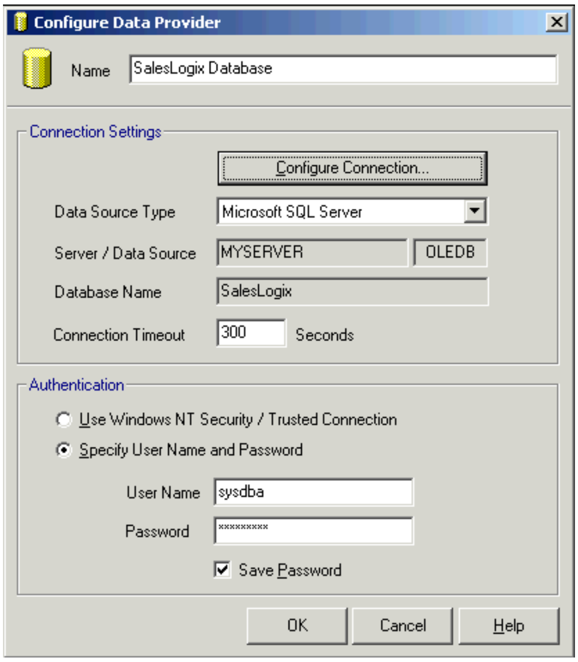


Figure 2 - Configure Data Provider Dialog

This dialog provides the means of defining the connection to your Saleslogix database, based upon either a Microsoft SQL Server connection or Oracle connection.

- Give your Data Provider a meaningful name (we recommend denoting Saleslogix in the name is advisable for future reference).
- Select the **Configure Connection…** button to begin defining the connection to your Saleslogix database. Based upon the database technology that is hosting your Saleslogix database, select from one of the following:

Saleslogix Running on Microsoft SQL Server

If your Saleslogix database is running on Microsoft SQL Server, continue on within this section. If your Saleslogix database is running on Oracle, turn to page 18.

4) From the **Data Link Properties** dialog, Provider tab, select the *Microsoft OLE DB Provider for SQL Server* provider.

   Important Warning! – Do not select the *[Saleslogix – OLE DB Provider]*, as it is not necessary for Paribus to access the data using this provider.

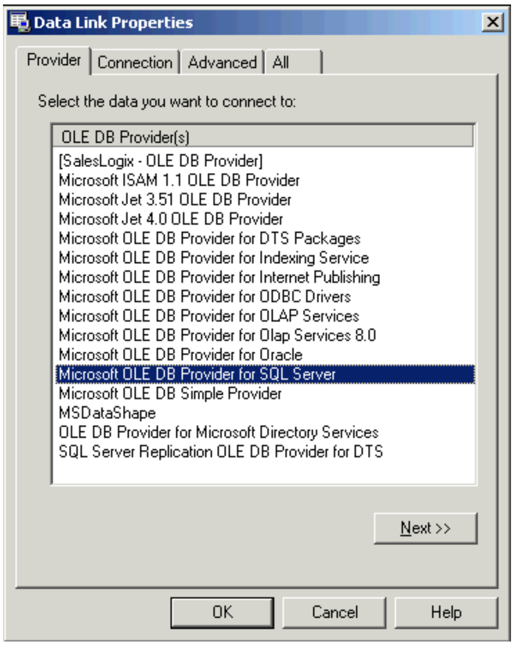


Figure 3 - Data Link Properties Dialog - Provider Tab

5) Once you have selected the provider, click **Next >>**.

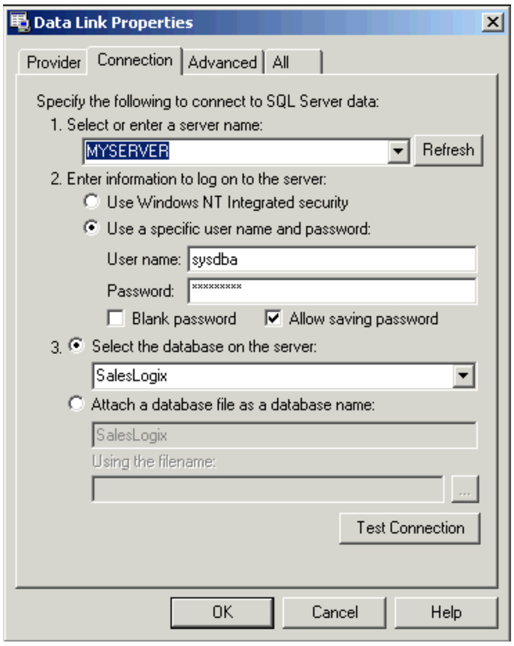


Figure 4 - Data Link Properties Dialog - Connection Tab

6) From the Connection Tab, complete the following details relating to the SQL Server hosting your Saleslogix database:

7) **Server Name**: This is the name of the SQL Server machine.

8) **Logon Information**: Select the "Use a specific user name and password:" option, and specify the user name and password that owns your Saleslogix database (this is typically **sysdba**).

9) **Allow saving password**: Selecting this option avoids users needing to know or remember this when later performing a match process. Recommend checking this option.

10) **Database on the server**: Select your Saleslogix database from the drop-down list.

11) **Test Connection**: Use this button to test your connection details are valid and correct.

12) If tested successfully, click the **OK** button to return to the **Configure Data Provider** dialog to continue configuring your Data Provider – see page 20.

13) If your test was not successful, contact your Saleslogix systems administrator or consult your SQL Server documentation.

Saleslogix Running on Oracle

If your Saleslogix database is running on Oracle, continue on within this section. If your Saleslogix database is running on Microsoft SQL Server, turn to page 16.

1) From the **Data Link Properties** dialog, Provider tab, select the *Oracle Provider for OLE DB* provider (as supplied by Oracle).

   Important Warning! – We recommend using the Oracle supplied *OLE DB Provider*, however should you encounter difficulties then suggest using the Microsoft supplied *Oracle OLE DB Provider*.

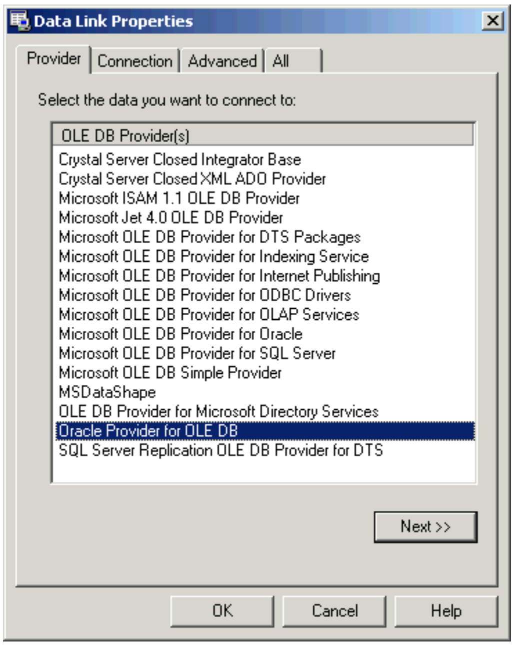


Figure 5 - Data Link Properties Dialog - Provider Tab

2) Once you have selected the provider, click **Next >>**.

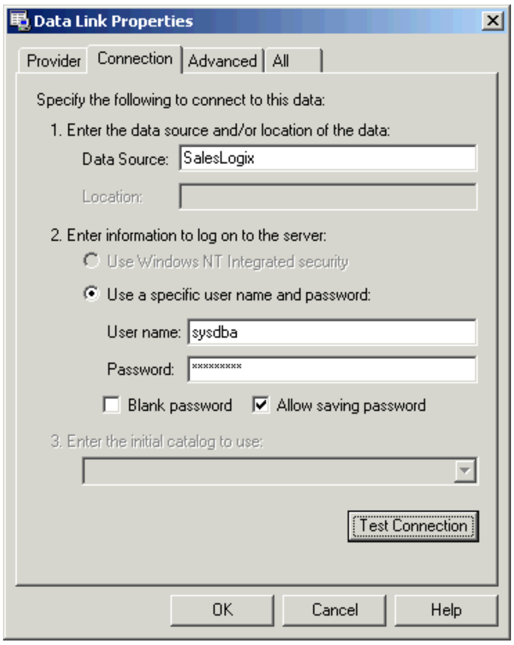


Figure 6 - Data Link Properties Dialog - Connection Tab

3) From the Connection Tab, complete the following details relating to the Oracle Server hosting your Saleslogix database:

4) **Data Source**: This is the Oracle Alias name defined within your Oracle client setup (**tnsnames**).

5) **Logon Information**: Select the "Use a specific user name and password:" option, and specify the user name and password that owns your Saleslogix database (this is typically **sysdba**).

6) **Allow saving password**: Selecting this option avoids users needing to know or remember this when later performing a match process. Recommend checking this option.

7) **Test Connection**: Use this button to test your connection details are valid and correct.

8) If tested successfully, click the **OK** button to return to the **Configure Data Provider** dialog to continue configuring your Data Provider – see page 20.

9) If your test was not successful, contact your Saleslogix systems administrator or consult your Oracle documentation.

Configuring Your Paribus Data Provider

Once you have successfully configured the connection details of your Paribus Data Provider, you are now ready to define the additional settings.

Data Provider Connection Settings

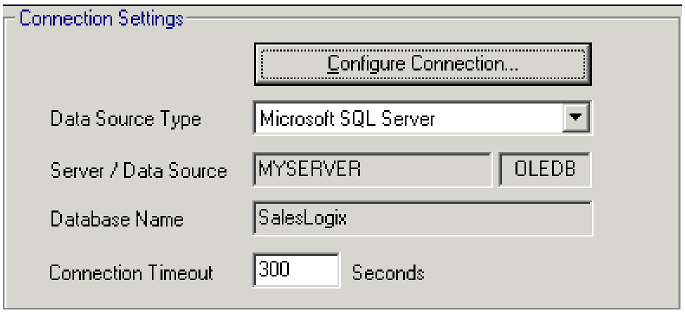


Figure 7 - Connection Settings of Data Provider

This section outlines the Connection Settings information as defined in the section above. To change these details, click the **Configure Connection…** button.

The **Connection Timeout** value denotes the number of seconds a database transaction has to complete before it is deemed to be not responding. The default value is 300 seconds (5 minutes), however on large databases this value may need to be increased if timeout issues occur.

Data Provider Authentication

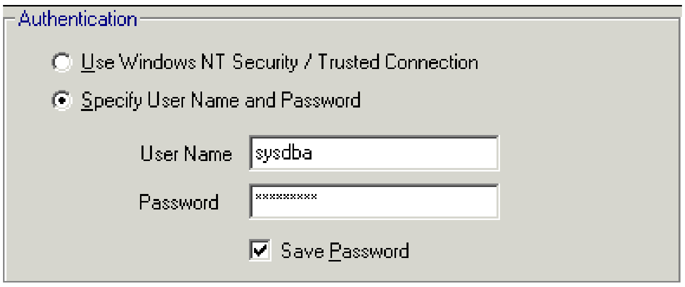


Figure 8 - Authentication Details of Data Provider

This section denotes the authentication details required to connect to your Saleslogix database. This should always be the Saleslogix administration ID (e.g. **sysdba**), and not a Saleslogix username.

The use of **NT Security / Trusted Connections** (SQL Server only) is not support when connecting to Saleslogix databases.

The **Save Password** option enables the password to be saved within the Data Provider definition, and prevents a password prompt being displayed any time the password is required. Please note that saved passwords are stored securely under encryption.

For more information on configuring Data Providers, see the Paribus on-line help information.

Step 4: Importing Saleslogix Match Definitions

The Paribus matching processes is supported by a collection of Paribus Match Definitions, which define what information is to be matched upon, and where this information is sourced (e.g. your Saleslogix database).

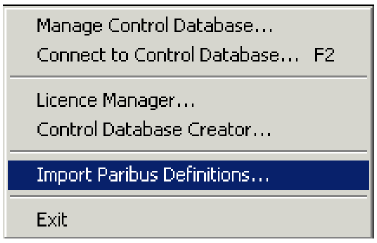
The Paribus Discovery for Saleslogix Component comes complete with a pre-defined set of Paribus Match Definitions, ready mapped to the standard Saleslogix database model. This includes:

- Accounts
- Contacts
- Addresses
- Telephone Numbers
- Websites and email Addresses
- Regions, Industries, Divisions, Territories

Note: Additional Match Definitions can be manually defined, should an item you require not be provided in the standard set – for details on how to establish your own Match Definitions see the Paribus product on-line help information.

How to Import Saleslogix Match Definitions

Firstly, start your installation of Paribus from the application icon, and log into the Paribus Control database your created during the installation of Paribus. If you have not yet achieved this step, see the *Paribus Getting Started Guide* to established how.



Once you have successfully logged into Paribus, select the **File** menu and **Import Paribus Definitions…**

This will open the Import Paribus Definitions dialog.

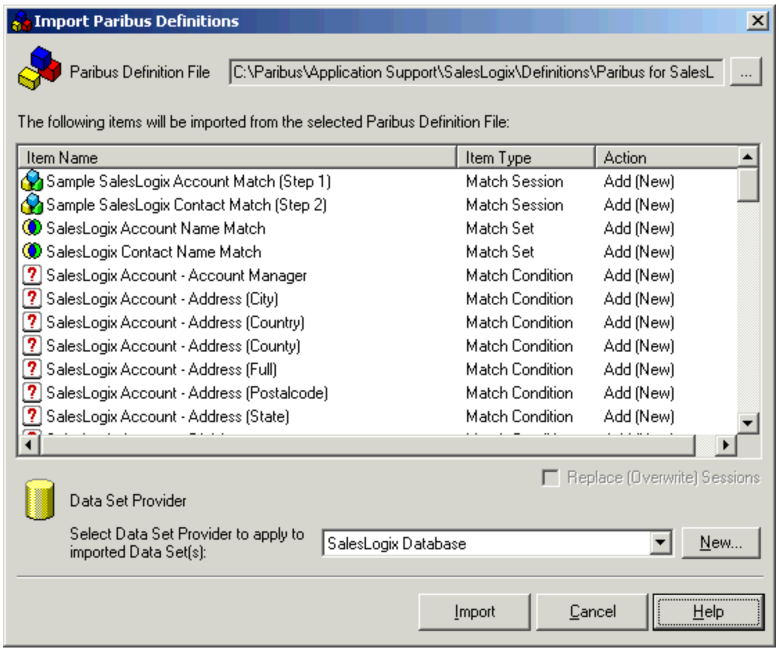


Figure 9 - Import Paribus Definitions Dialog

- Select the Paribus Discovery for Saleslogix Definition file you wish to import by clicking the ellipsis (**…**) button.

  Note: This action happens automatically when first entering this dialog.
- From the **Select Paribus Definition File** dialog select one of the follow files (this file can be found on your Paribus Installation Package or alternatively supplied directly by your Paribus software supplier or Saleslogix Business Partner):

  - Paribus Discovery for Saleslogix (SQLServer).pds
  (for Microsoft SQL Server users)

  - Paribus Discovery for Saleslogix (Oracle).pds
  (for Oracle users)

  Note: The Paribus definitions for Saleslogix have been uniquely compiled for specific geographic regions to best optimise the matching process for that region – ensure you install the Paribus definitions for your region.

- Once selected, on returning to the **Import Paribus Definitions** dialog the main list should contain the definition items you wish to import.
- The **Action** column denotes which action will be taken during the import. If a definition item already exists, this will be overwritten (if required). If a definition item does not exist, the action will be to add as new.
- The **Replace (Overwrite) Sessions** checkbox denotes if an existing Match Session will be overwritten (if applicable).

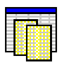
Data Set Provider

- When importing definitions that contain Paribus Data Set definitions (Data Maps), it is necessary to denote the Data Provider definition that will be providing the data to those Data Sets.
- In the **Data Set Provider** section, select the Data Provider you defined in Step 2 on page 14.

  If you have not yet completed step 2, click the **New…** button and carry out step 2 now.
- Finally, click the **Import** button to import the selected Paribus Definitions.

Step 5: Testing Your Set-up

Once you have successfully defined your Data Provider (Step 2) and imported the Paribus Discovery for Saleslogix Match Definitions (step 3), you are now ready to test your set-up to ensure Paribus is correctly configured to access your Saleslogix database.



Data Sets

From the main Paribus application screen, select (left-click) the Data Sets icon in the left-hand navigation bar.

This will display the list of Data Sets. From this list locate the item entitled "**Saleslogix Account - Account Name**" and Right-click it, and select **Edit Data Set…** from the popup menu.

This action will display the **Data Set Definition** dialog.

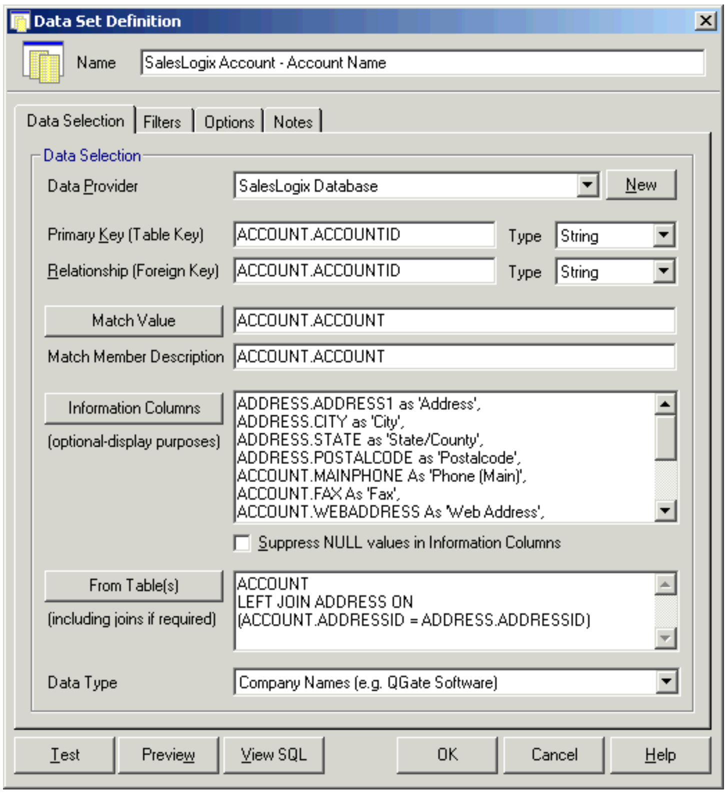


Figure 10 - Data Set Definition Dialog

The **Data Set Definition** dialog details information about database tables and columns that are provided by the Data Provider. Data Sets provide the information used to drive the matching process.

For more information on configuring Data Sets, see the Paribus on-line help information.

Performing the Test

To test the Data Set and the Data Provider you created in Step 2, perform the following:

- Ensure the Data Provider is the one you defined in step 2.
- Click the **Test** button to perform a test of the Data Set. This test will not only test the content of the Data Set Definition, but also test the Data Provider definition.
- If the test was successful, the message box similar to the follow will appear, detailing the count of records (e.g. Saleslogix Accounts) in your Saleslogix database.

- If the test was not successful, the Paribus **Data Set Test Transaction** dialog should appear, providing information on the nature of the failure.

  Check the actions defined in the preceding steps have been defined correctly and retry the test again.

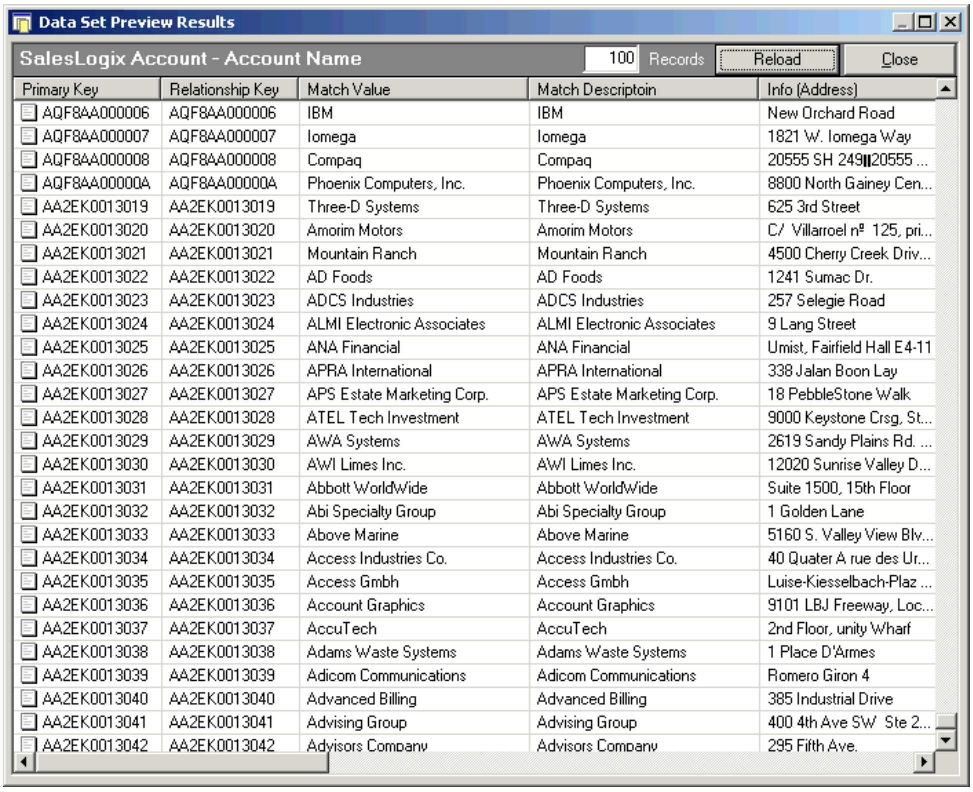
If the problem persists, please contact your Saleslogix Administrator.

- To close the **Data Set Definition** dialog, click the **Cancel** button.

Previewing Data Set Results

If the Data Set test was successful, you may preview the data provided by the Data Set, by clicking the **Preview…** button.

This action will display the **Data Set Preview Results** dialog.



Primary Key	Relationship Key	Match Value	Match Descriptoin	Info (Address)
AQF8AA000006	AQF8AA000006	IBM	IBM	New Orchard Road
AQF8AA000007	AQF8AA000007	Iomega	Iomega	1821 W. Iomega Way
AQF8AA000008	AQF8AA000008	Compaq	Compaq	20555 SH 249 20555 ...
AQF8AA00000A	AQF8AA00000A	Phoenix Computers, Inc.	Phoenix Computers, Inc.	8800 North Gainey Cen...
AA2EK0013019	AA2EK0013019	Three-D Systems	Three-D Systems	625 3rd Street
AA2EK0013020	AA2EK0013020	Amorim Motors	Amorim Motors	C/ Villarroel nº 125, pri...
AA2EK0013021	AA2EK0013021	Mountain Ranch	Mountain Ranch	4500 Cherry Creek Driv...
AA2EK0013022	AA2EK0013022	AD Foods	AD Foods	1241 Sumac Dr.
AA2EK0013023	AA2EK0013023	ADCS Industries	ADCS Industries	257 Selegie Road
AA2EK0013024	AA2EK0013024	ALMI Electronic Associates	ALMI Electronic Associates	9 Lang Street
AA2EK0013025	AA2EK0013025	ANA Financial	ANA Financial	Umist, Fairfield Hall E4-11
AA2EK0013026	AA2EK0013026	APRA International	APRA International	338 Jalan Boon Lay
AA2EK0013027	AA2EK0013027	APS Estate Marketing Corp.	APS Estate Marketing Corp.	18 PebbleStone Walk
AA2EK0013028	AA2EK0013028	ATEL Tech Investment	ATEL Tech Investment	9000 Keystone Crsg, St...
AA2EK0013029	AA2EK0013029	AWA Systems	AWA Systems	2619 Sandy Plains Rd. ...
AA2EK0013030	AA2EK0013030	AWI Limes Inc.	AWI Limes Inc.	12020 Sunrise Valley D...
AA2EK0013031	AA2EK0013031	Abbott WorldWide	Abbott WorldWide	Suite 1500, 15th Floor
AA2EK0013032	AA2EK0013032	Abi Specialty Group	Abi Specialty Group	1 Golden Lane
AA2EK0013033	AA2EK0013033	Above Marine	Above Marine	5160 S. Valley View Blv...
AA2EK0013034	AA2EK0013034	Access Industries Co.	Access Industries Co.	40 Quater A rue des Ur...
AA2EK0013035	AA2EK0013035	Access Gmbh	Access Gmbh	Luise-Kiesselbach-Plaz ...
AA2EK0013036	AA2EK0013036	Account Graphics	Account Graphics	9101 LBJ Freeway, Loc...
AA2EK0013037	AA2EK0013037	AccuTech	AccuTech	2nd Floor, unity Wharf
AA2EK0013038	AA2EK0013038	Adams Waste Systems	Adams Waste Systems	1 Place D'Armes
AA2EK0013039	AA2EK0013039	Adicom Communications	Adicom Communications	Romero Giron 4
AA2EK0013040	AA2EK0013040	Advanced Billing	Advanced Billing	385 Industrial Drive
AA2EK0013041	AA2EK0013041	Advising Group	Advising Group	400 4th Ave SW Ste 2...
AA2EK0013042	AA2EK0013042	Advisors Company	Advisors Company	295 Fifth Ave.

Figure 11 - Data Set Preview Results Dialog

The Data Set Preview Results dialog displays a list of records (100 by default) established from the Data Set definition, this includes:

- **Primary Key**: The Primary Key value of the Data Set
- **Relationship Key**: The Relationship key value of the Data Set
- **Match Value**: The value(s) that will be used to match data from this Data Set
- **Match Description**: The description is the value that will appear in the Match Review process
- **Info Columns**: Additional columns of data used to provide information only data

To see more records, change the value in the Records field and click the **Reload** button.

Step 6: Installing Your Paribus Discovery for Saleslogix Component Licence

To use the Paribus Discovery for Saleslogix Component Plug-in requires a Plug-in licence to be installed.

Licences are issued at the time of purchased and can be obtained from your Paribus Software Supplier or Saleslogix Business Partner.

Running with a Paribus Evaluation Licence

If your installation of the main Paribus product is running on an evaluation licence, and/or you do not have a licence for the Paribus Discovery for Saleslogix Component, the Paribus Discovery for Saleslogix Component will only provide limited functionality.

Paribus Licence Manager

The Paribus Licence Manager is used to add, edit, and delete licences and can be accessed via the Paribus main menu: **File** > **Licence Manager...**

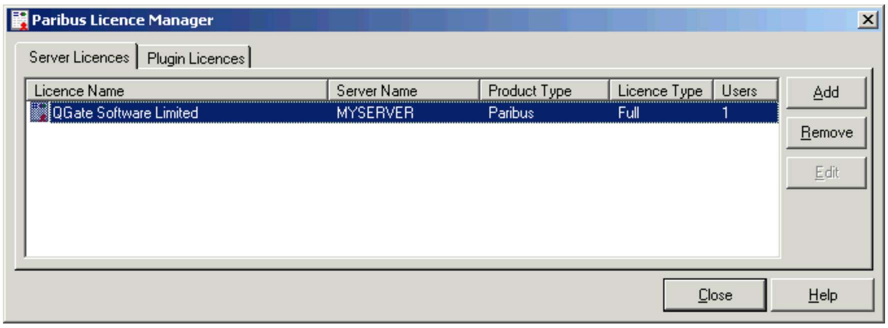


Figure 12 - Paribus Licence Manager

Adding Your Paribus Discovery for Saleslogix Component Licence

- To add your Paribus Discovery for Saleslogix licence, open the **Paribus Licence Manager** and select the **Plug-in Licences** tab.
- New licences are added by clicking the **Add** button. A standard file selection dialog is displayed from where the required Paribus Plug-in Licence (***.ppl**) can be selected.
- Select the licence file: **Paribus Discovery for Saleslogix.ppl**
- Having successfully added your Paribus Plug-in licence, this will then be listed in the Licence Manager list.

Step 7: Enabling the Paribus Discovery for Saleslogix Plug-in

The final step is to enable the Paribus Discovery for Saleslogix Component Plug-in for use during the Paribus Match Review process. This feature provides direct integration between Paribus and Saleslogix, when reviewing the duplicate Accounts/Contacts identified by Paribus.

To enable this feature, select **Settings…** from the main Paribus application **Tools** menu. This action will display the **Applications Settings** dialog.

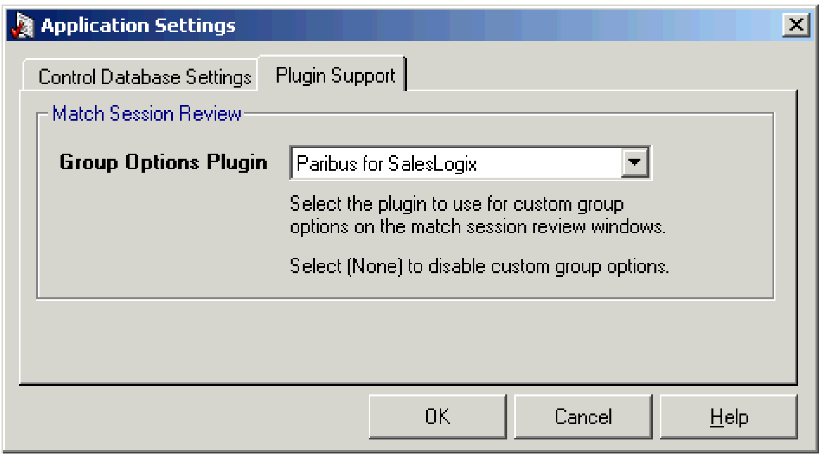


Figure 13 - Application Settings Dialog - Plug-in Support Tab

- Select the Plug-in Support tab.
- From the **Group Options Plug-in** drop-down list, select the **Paribus for Saleslogix** plug-in.
- Click the **OK** button to save and close this dialog.

Identifying Matching Data in Saleslogix

Once you have successfully set-up the Paribus Discovery for Saleslogix Component Plug-in, you are now ready to begin identifying matching (duplicate) Saleslogix Accounts and Contacts.

If you have yet to complete the set-up process outlined on page 12, we strongly recommend you do so before continue this section.

Establishing the Matching Process

Firstly, it is greatly important to establish the most effective matching process when wishing to identify duplicate records within your Saleslogix database.

Considering the data structure of Saleslogix Accounts and Contacts are both separate but related, it is necessary for each of these entities to be processed individually.

Match Process 1: Saleslogix Accounts

The first match process should be to match Saleslogix Accounts, to establish a collection of potential duplicate Accounts for consolidation (reassignment of related records) and de-duplication.

In turn, this will consolidate associated Contacts from all duplicate Accounts, into a single 'Master' Account.

There is the potential that the consolidated Contacts are also duplicates within the same Account. This issue will be handled in the next match process.

Match Process 2: Saleslogix Contacts

Once the first match process of Saleslogix Accounts has been identified and the results processed against your Saleslogix database (consolidation and duplicate removal), you are then able to execute the second match process against Saleslogix Contacts.

Warning! – We do not recommend running the second match process until you have successfully completed the first match process.

The criteria for this match process should ideally be based upon similar sounding Contact names (title, first and last), and an exact match on Saleslogix Account ID.

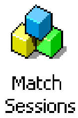
This will ensure that only contacts at the same Account are deemed potential duplicates. This is an important consideration when dealing with person names, as many people can share the same name, but are however technically not the same person (i.e. Mr John Smith). Adding the Account relationship into the matching criteria can help to reduce the occurrence of this.

Paribus Discovery for Saleslogix Match Definitions

The Paribus Discovery for Saleslogix Match Definitions set you imported during the set-up (see page 21), provides two example Match Sessions. One for matching Saleslogix Accounts (Match Process 1), and another for matching Saleslogix Contacts (Match Process 2).

Running a Paribus Match Session

Let's begin by running the first of our Paribus Match Session to identify matching Saleslogix Accounts. To achieve this we will use the sample Match Sessions supplied in the Match Definitions we imported earlier.



From the main Paribus application screen, select (left-click) the Match Sessions icon in the left-hand navigation bar.

This will display the list of existing Match Sessions. From this list locate the item entitled "**Sample Saleslogix Account Match (Step 1)**" and Right-click it, and select **Run Session…** from the popup menu.

This action will display the **Identify Matches** dialog.

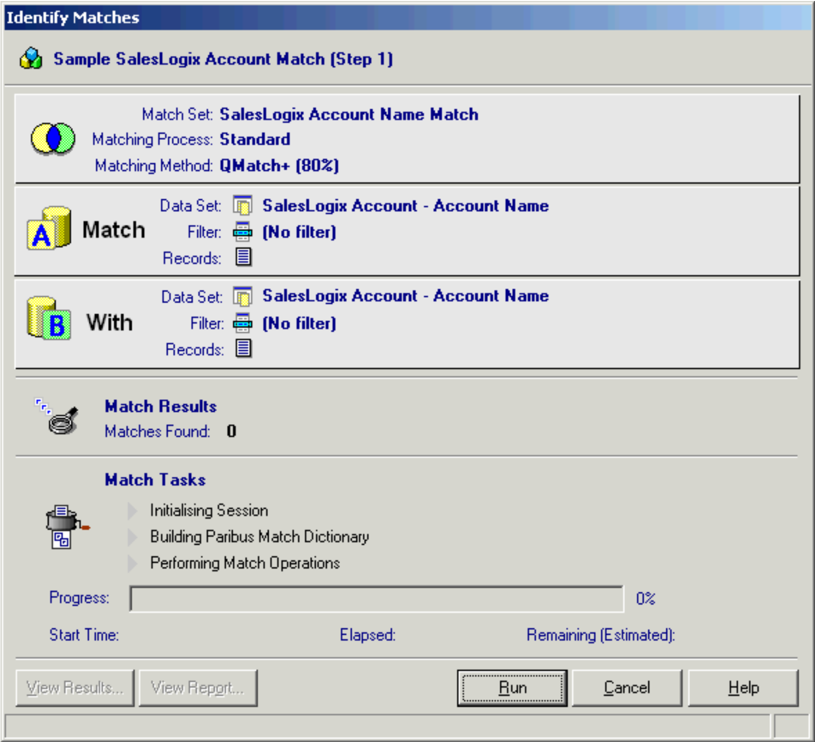


Figure 14 - Identify Matches Dialog

This dialog provides the means of running an existing Match Session, to identify matching data.

The summary information shows details about the Match Session, together with information on the progress of the matching process.

To start the matching process, click the **Run** button.

Providing everything has been set-up and configuration correctly, the matching process should begin processing your Saleslogix data to identify duplicates.

If any errors are reported, check the set-up and configuration of your Paribus installation and retry this operation.

Note: If the count of records to be processed is sizeable (> 5000 Accounts), this process may take some time to complete. If you wish to cancel the matching process and refine the criteria, then click the **Cancel** button and go to the section - Defining/Refining the Match Session Settings on page 30.

Once the Identifying Matches process has completed, a summary report detailing the findings of the process is displayed. Closing the report window will return you to the Identify Matches dialog.

If Paribus managed to identify matching records, you may now review the Match Results – see page 35.

If Paribus did not manage to identify any matches, this may be due to one or more of the following:

- No duplicate information exists within your Saleslogix database
- The match criteria defined within the Match Session is set too high – see Defining/Refining the Match Session Settings on page 30.

To close the Close the **Identify Matches** dialog, click the **Close** button.

Defining/Refining the Match Session Settings

The matching process is defined within your Paribus Match Session. You will likely wish to define/redefine you Match Session several times to achieve the best results.

From the main Paribus application screen, select (left-click) the Match Sessions icon in the left-hand navigation bar.

This will display the list of existing Match Sessions. From this list locate the item entitled "Sample Saleslogix Account Match (Step 1)", Right-click it, and select **Edit Session…** from the popup menu.

This action will display the **Match Session Settings** dialog.

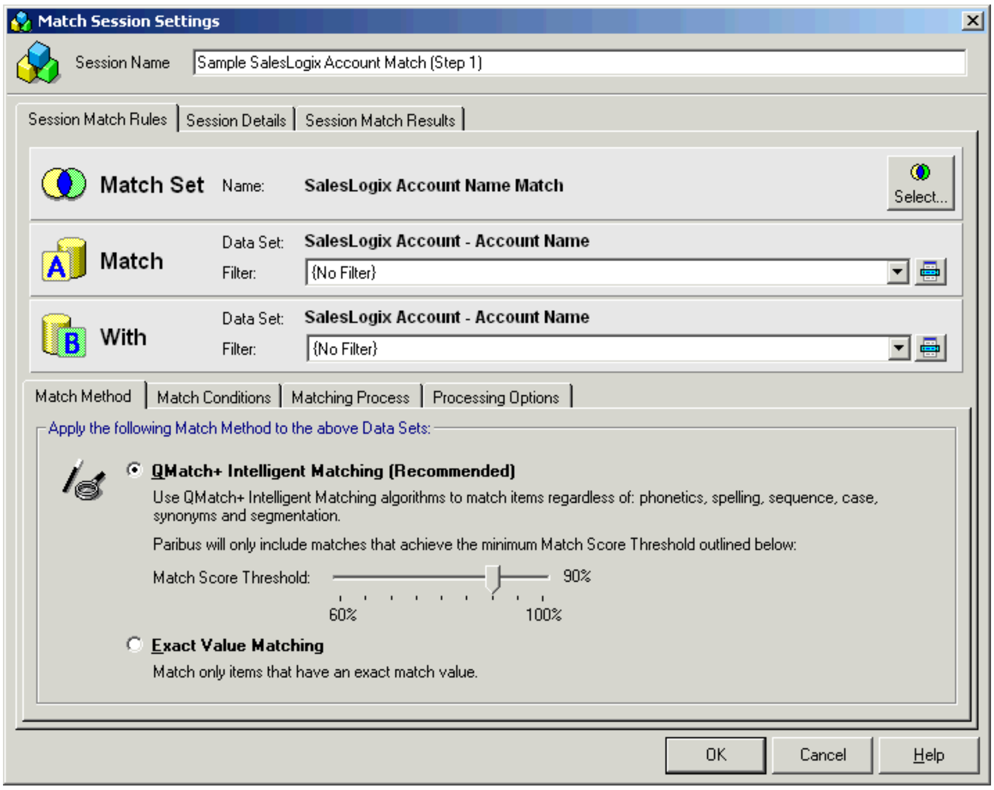


Figure 15 - Match Session Settings Dialog

This dialog outlines the configuration of an existing Match Session, defined to match upon Saleslogix Accounts.

Session Match Rules Tab

The Session Match Rules tab denotes the Match Set that will be used to initially identify Saleslogix Accounts and Contacts (i.e. **Saleslogix Account Name Match**). This Match Set defines two Data Sets that are compared in the matching process.

Data Sets

The two Data Sets (A and B) defined by the Match Set, combine the same Data Sets (i.e. **Saleslogix Account – Account Name**), to provide the ability of performing a self-match upon the same set of data.

Filters

Each Data Set (A and B) can have an option filter applied to them, which denotes the content of each Data Set. A filter may be based upon location (e.g. UK Accounts), or perhaps Account Manager. Filters provide a useful means of limited the scope of the matching process (where appropriate).

Filters can be managed by clicking the filter icon button ().

Caution! – When applying a filter, avoid using filters that may limit the scope of a Data Set with criteria that may conflict with what you are trying to match. An example would be to not filter Account names, as this would potentially limit the ability to match Accounts of differing names but still potentially duplicates (e.g. *University of London* would not find *London University*).

Match Method

The Match Method Tab denotes the method to use when matching your Saleslogix Account and Contact names.

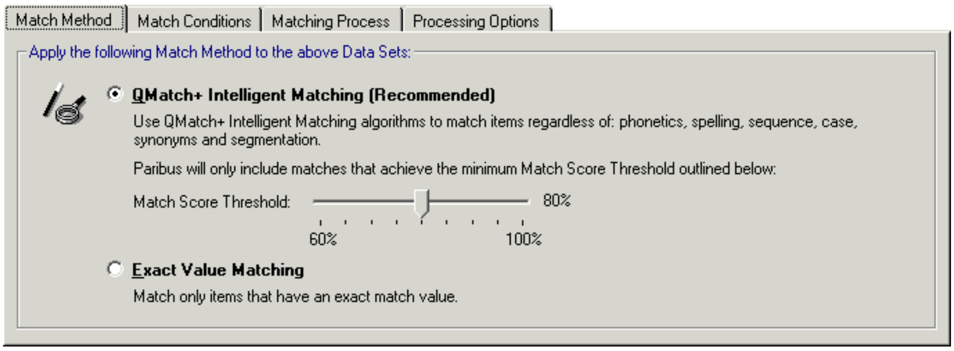


Figure 16 – Match Session - Match Method Tab

QMatch+ Intelligent Matching

By default matching Saleslogix Accounts/Contacts should use the **QMatch+ Intelligent Matching** method, which identifies matching Account/Contact names regardless of phonetics, spelling, sequence, case, synonyms and segmentation.

Match Score Threshold

The **Match Score Threshold** denotes the minimum match score an Account/Contact must achieve to be classed as a duplicate. Low match score values will provide relaxed matching, whilst high match score values enforces stricter matching.

A default match score of **80%** typically provides suitable results for most Saleslogix Account and Contact Names.

For more information on QMatch+ Intelligent matching, see the Paribus online information.

Exact Value Matching performs matches upon a direct comparison (with the exception of case). This does not typically provide a suitable matching method for Saleslogix Account/Contact names.

Match Conditions

The Match Conditions Tab denotes what additional conditions (match criteria) should be applied when matching your Saleslogix Account and Contact names.

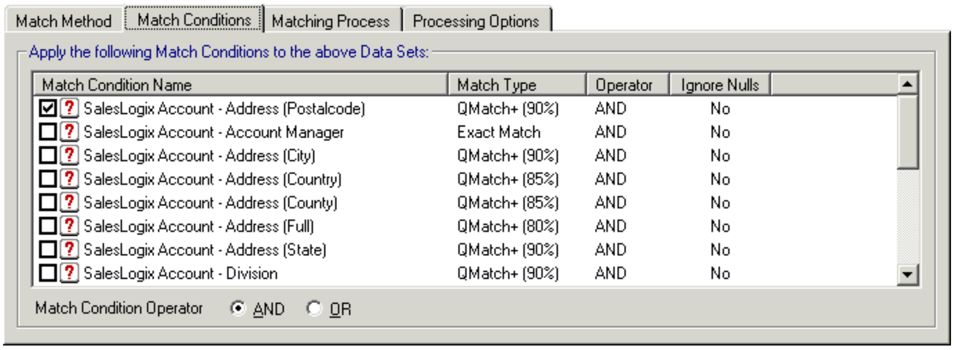


Figure 17 - Match Session - Match Conditions Tab

In the case of matching Saleslogix Account names, a Match Condition of **Postal Code** typically provides an effective condition to the matching process. Other Match Conditions can also be added if required.

In the case of matching Saleslogix Contact names, a Match Condition of **Account ID** typically provides an effective condition to the matching process. Other Match Conditions can also be added if required.

- To select a Match Condition, check the box to the left of the Match Condition Name.
- The behaviour of each Match Condition can be changed by double-clicking the Match Condition item. This action will display the **Session Match Set Condition Settings** dialog for the select Match Condition.

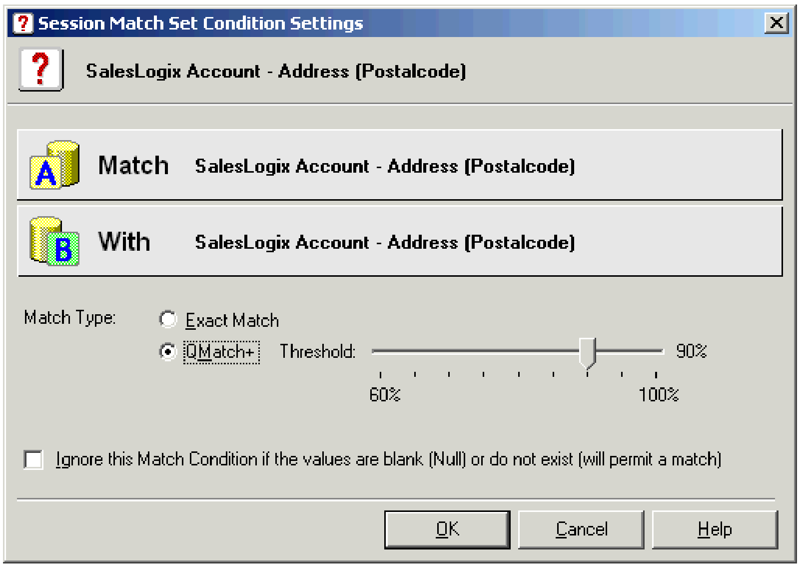


Figure 18 - Session Match Set Condition Settings Dialog

- **Match Type**: Denotes the match type operation for this Match Condition.
- **Threshold**: Denotes the match score threshold this Match Condition must reach for this Condition to be met.
- **Ignore Nulls**: If checked this option denotes that if a Match Conditions value is NULL (blank) that it will still pass the conditional check.

Use this option if your data is not always complete and you wish to include items that may otherwise not fulfil the criteria.

Matching Process

The Matching Process Tab denotes which Paribus Match Process should be used when matching your Saleslogix Account and Contact names.

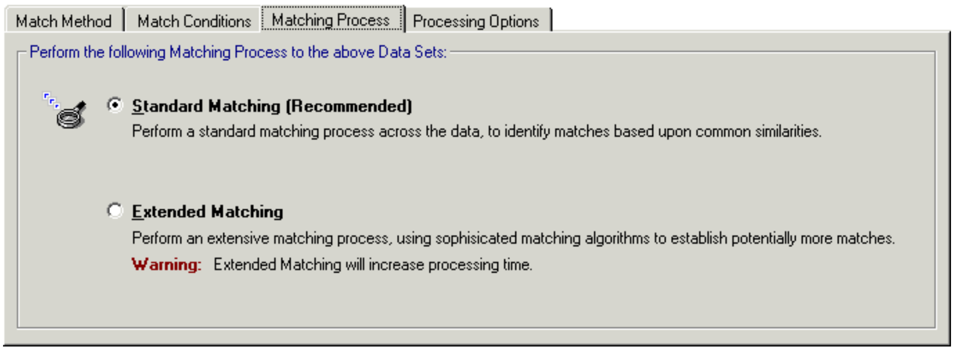


Figure 19 - Match Session - Matching Process Tab

By default, matching Saleslogix Accounts/Contacts should use the **Standard Matching** process.

The **Extended Matching** process performs a much more granular comparison of the data, however this does dramatically increase the processing time required. Generally for matching on Saleslogix Account and Contact Names, extended matching is not recommended.

Processing Options

The Process Options Tab denotes processing options available when performing the Matching Process.

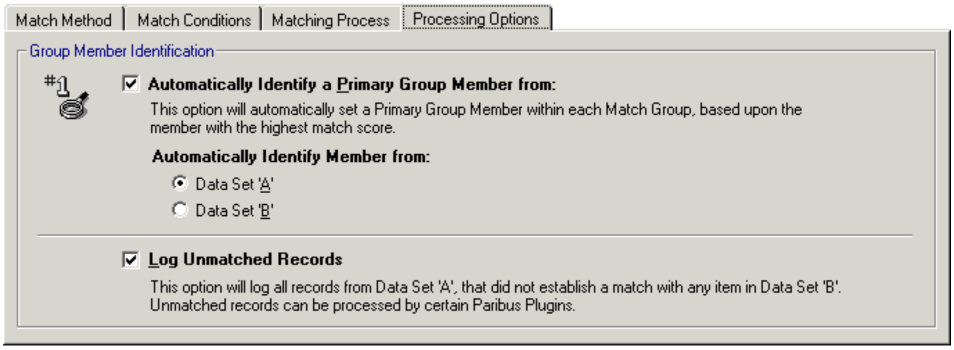


Figure 20 - Match Session - Processing Options Tab

Automatically Identify a Primary Group Member

This option denotes that a Primary Group Member (Master Account or Contact) will be automatically identified within each group of matches found. The member selected is based upon the one with the highest match score, from the specified Data Set.

We recommend using this option when matching Saleslogix Accounts and Contacts, as this will greatly assist in the Match Review process.

Automatically Identify Member from

This option denotes the Data Set from which to automatically select the Primary Group Member.

Log Unmatched Records

This option will log in the Match Results, reference to all records from Data Set (A) that did not match with any records from Data Set (B).

This option is required if you wish to use the Paribus Discovery for Saleslogix Update Unmatched Accounts feature.

For more information on configuring Paribus Match Session Settings, see the Paribus online information.

Reviewing your Saleslogix Match Results

Having successfully established a set of Match Results, the next stage is to review them. The Paribus Review Process is indented to provide an illustration of the duplicate Saleslogix Accounts and Contacts found, and the opportunity for the user to alter any duplicate relationships if required.

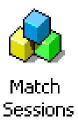
Important Warning

No Saleslogix Accounts and/or Contacts can be processed (removal of duplicate data) by the Paribus Discovery for Saleslogix Component Plug-in, until they have been reviewed. This is to ensure that no data can be changed or removed without prior confirmation.

The Paribus Review Window

The Paribus Review Process is managed from the Paribus Review Window, available from within the main Paribus application.

Paribus Match Results are contained within the Match Session responsible for generating them.



To review Match Results for a given Match Session, from the main Paribus application screen, select (left-click) the Match Sessions icon in the left-hand navigation bar.

This will display the list of existing Match Sessions. From this list locate the Match Session you wish to review, Right-click it, and select **Review Session…** from the popup menu.

Note: This option is not available if your session does not contain any results.

This action will display the **Session Match Results** window.

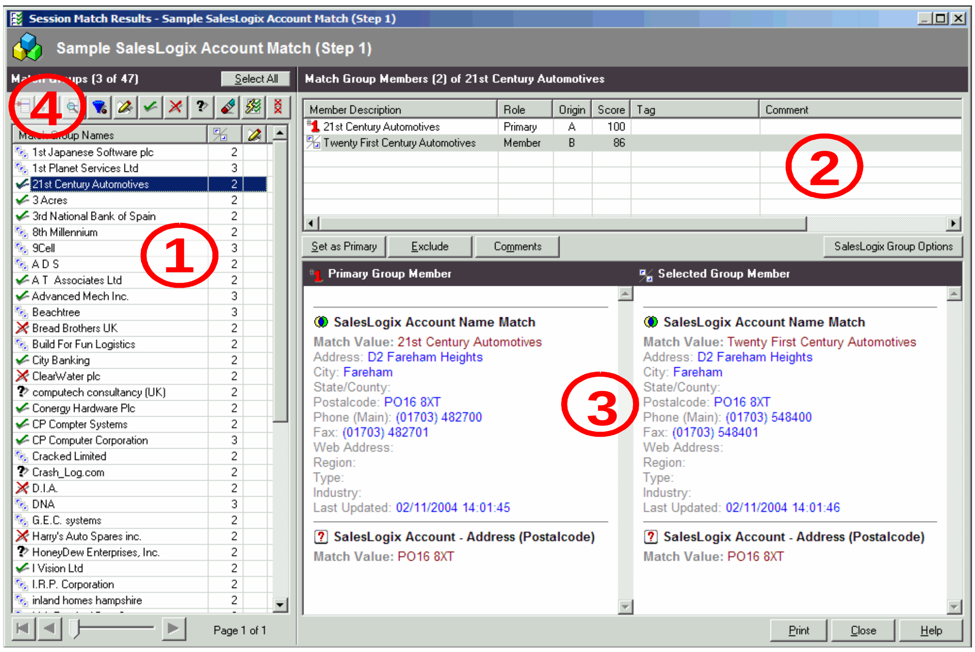


Figure 21 - Session Match Results - Review Window

The Session Match Results window provides the means of reviewing the matches found within your Paribus Match Session. This window illustrates the following:

1) **Match Groups**: All duplicates are grouped into Match Groups, and are listed in the Match Group list on the left of the review window.

   Below the Match Group list is a collection of navigation controls, which enable you to navigate through additional pages of Match Groups. Match Groups are displays in pages of 50.

2) **Group Members**: Each Match Group contains two or members (duplicates), each member is listed in the Group Members list top-right.

   Below the Group Members list is a collection of buttons that enable the manipulation of Group Members (see below).

   The **Saleslogix Group Options** button provides addition integration with Saleslogix for managing the current list of Group Members – see page 40.

3) **Member Information Pane**: The bottom-right area provides a summary of additional information about each Group Member. This information is provided to assist the review process of confirming duplicates.

4) **Review Control Buttons**: The collection of buttons at the base of the review window provides control of the Paribus **Match Groups** and **Group Members**.

For more information on the Paribus Match Review window, see the Paribus online information.

Review Process Objectives

The main objective of the Paribus Review Process is to manually review each of the Match Groups, and confirm acceptance or rejection of the duplicates that Paribus has identified.

The Paribus technology is designed to identify matching data based upon the matching rules you define, however sometime the match results may not always be as desired. This may be due to one or more of the following:

- Poor data
- Inappropriate matching rules
- Too relaxed or too strict match score thresholds.

In the case of reviewing Saleslogix match results (i.e. Accounts and Contacts), the status of each Match Group must be set explicitly to denote your acceptance or rejection of that Match Group.

Furthermore the Role of each Group Member must also be set, to denote what record will act as the Primary (master record), and which members are simply members (duplicates). In addition, Group Members can also be excluded.

The Match Group status is used during the duplicate processing performed by the Paribus Discovery for Saleslogix Component Plug-in, to control which Match Groups will be updated.

Furthermore, the Group Member Role is also used by the Paribus Discovery for Saleslogix Component Plug-in to denote which records are processed and how.

Match Group Statuses for Saleslogix Results

For the purposes of processing duplicates by the Paribus Discovery for Saleslogix Component plug-in, the following Match Group statuses apply:

Not Reviewed (Default)

This is the default Match Group status applied by Paribus at the time of matching.

Reviewed

Setting a Match Group status to "Reviewed" denotes your acceptance of this Match Group and that the group contains valid duplicate members and the Primary member (master) will be the one remaining Account/Contact after the processing of duplicates.

Note: A Match Group status cannot be set to "Reviewed" unless a Primary Group Member has been defined (see below), or contains less than two active members.

Void

Setting a Match Group status to "Void" denotes your rejection of this Match Group and that you wish this group to be excluded in the processing of duplicates.

Query

Setting a Match Group status to "Query" denotes you have a query against this Match Group and wish to return to this at a later stage. Queried Match Groups will not be included in the processing of duplicates.

Setting Match Groups statuses to "Query" provides the means of marking them during the review process and moving on, with the ability to return to them later or after seeking assistance from someone else if required.

Group Member Roles for Saleslogix Results

For the purposes of processing duplicates by the Paribus Discovery for Saleslogix Component plug-in, the following Group Member Roles apply:

Note: The Member Roles listed here are for Single Data Source matches only.

Primary Group Member – (Master Record)

Setting a Group Member Role to "Primary" denotes the member is an active member of the group and is classed as the **Master** record. The Primary Member (Master) when processed by the Paribus Discovery for Saleslogix Component Plug-in is the record that will remain and inherit all associated information from the duplicates (options dependent).

Group Member (Default) – (Duplicate Record)

Setting a Group Member Role to "Member" denotes the member is an active member of the group and is classed as a **Duplicate** record. Members (Duplicates) when processed by the Paribus Discovery for Saleslogix Component Plug-in are the records that will be removed (options dependent).

Excluded Group Member

Setting a Group Member Role to "Excluded" denotes the member has been excluded from the Match Group, and will not be processed by the Paribus Discovery for Saleslogix Component Plug-in. (This record will not be affected).

Note: When excluding members from a Match Group, if the Match Group has less than two active members, the Match Group status will automatically be changed to "Void" ().

For more information on Match Groups and Group Members, see the Paribus online information.

Assisting the Review Process (Summary Duplicate Information)

To assist you in the review process of manipulating Match Groups and Group Members, additional summary information is provided in the summary area below the Group Member list.

The content of the summary is defined within the **Information Columns** definition of the following Paribus Data Sets:

- Saleslogix Account - Account Name
- Saleslogix Contact – Name

For more information on editing Data Sets, see the Paribus online information.

When reviewing Saleslogix Accounts and Contacts, the Saleslogix Group Options button also provides additional features to assist in summarising your duplicate records – see below.

Recording Notes and Comments

Whilst reviewing your Saleslogix Accounts and Contacts, if you wish to make notes and comments against either the Match Group of individual Group Members, this can be done from within the Paribus Review window.

Making notes is an ideal way of recording observations or comments against the matches as you review them, which can then be viewed again later.

Match Group Notes

If you wish to add a note against a Match Group, select the Match Group and click this button.

Member Tags and Comments

Comments

If you wish to add a Tag or comment against a Group Member, select the Member and click this button.

The Tag provides the means of attributing a fixed item if data (e.g. Marketing-code, Campaign-code) to a Group Member.
Note: The Tag will be recorded against the Account or Contact's Paribus Audit record, during the processing of duplicates.

Part Review/Part Process Duplicates

Paribus and the Paribus Discovery for Saleslogix Component Plug-in Component enable you to part-review a set of Match Results, and process only those that have been reviewed (i.e. Match Groups with a Group Status of "Reviewed" ()).

This approach avoids any lengthy delay between reviewing all Matches Results before they can be processed.

This approach can also assist in managing the volume of change that is applied to your Saleslogix database. You may wish to manage and process batches of duplicates to reduce the amount of system change that occurs.

There is no issue in processing your Paribus Match Session results through the duplicate removal processes more than once, as the process will only affect data that was not already been processed, or has subsequently changed.

Saleslogix Group Options

Whilst reviewing your Paribus Match results of Saleslogix Accounts and Contacts, the Paribus Discovery for Saleslogix Component Plug-in provides a custom feature within the Paribus Review window.

The Plug-ins features are intended to assist users in establishing the following:

- Confirming the Group Members are genuine duplicates
- Identifying the most appropriate Primary Group Member (Master record)
- Excluding Group Members not required in the duplicate cleansing process

To access the Paribus Discovery for Saleslogix Component Plug-in, firstly select the Match Group you wish to manage, and then click the **Saleslogix Group Options** button below the Group Members list of the Paribus Review window.

Note: If this button does not appear in your Match Review Window, ensure the Plug-in has been enabled – see page 25.

This action will display the Paribus Discovery for Saleslogix – Group Options dialog.

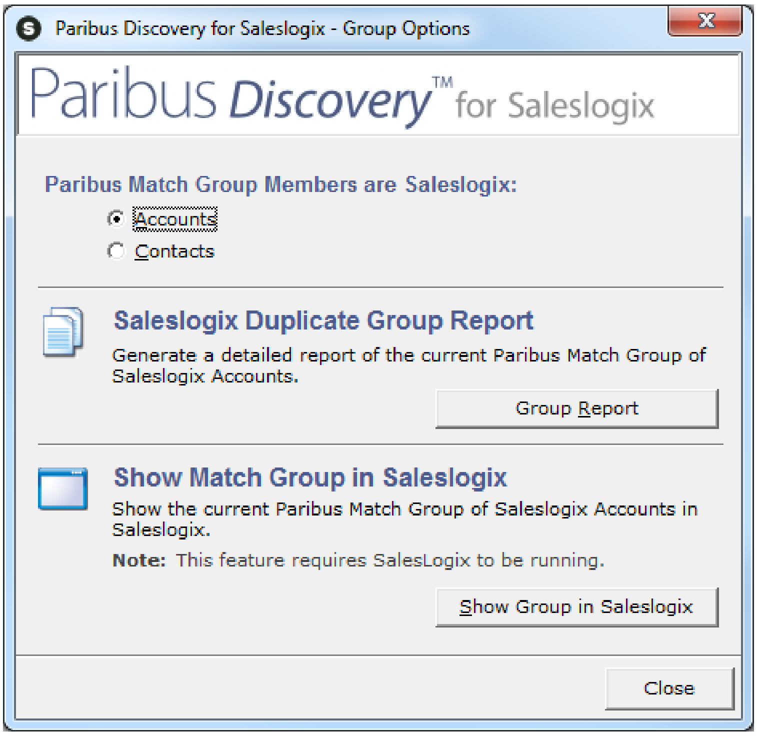


Figure 22 - Paribus Discovery for Saleslogix – Group Options Dialog

Paribus Match Group Members are Saleslogix

This section requires confirmation that the Match Group Members are either a collection of Saleslogix Accounts or Contacts. The plug-in will attempt to automatically establish this setting, however you can override if necessary.

Saleslogix Duplicate Group Report

The Saleslogix Duplicate Group Report option provides a detailed report of the current Match Group Members, and associated data (i.e. Contacts, Opportunities, Activities, Lead Sources, User Fields etc).

The report may also be printed or saved for future reference.

The report is intended to assist users in deciding which members of the Match Group should become the master and duplicate record(s), and potentially which records should be excluded from the Match Group.

Note: This option will require you to select the version of Saleslogix you are using and to log into your Saleslogix database. Ensure the Saleslogix database you log into is the same database that was used to generate the matches you are reviewing.

Show Match Group in Saleslogix

This option will display the current Match Group of Saleslogix Accounts or Contacts in your Saleslogix Sales Client application.

Contained within a standard Saleslogix Group, enables you to easily navigate around each record in Saleslogix, using the full power of the Saleslogix Sales Client.

This feature is intended to assist users in deciding which members of the Match Group should become the master and duplicate record(s), and potentially which records should be excluded from the Match Group.

Note: This option requires the Saleslogix Sales Client to be running on your machine, and logged into your Saleslogix database. Ensure the Saleslogix database you are logged into is the same database that was used to generate the matches you are reviewing.

Clicking the **Close** button will close the Group Options dialog and return you to the Paribus Review window.

Processing Duplicate Saleslogix Records

This section outlines how to process the Saleslogix duplicate records you have identified in the previous sections.

If you have not yet completed the previous steps or do not yet have any duplicate Saleslogix records to process, please refer to the previous sections.

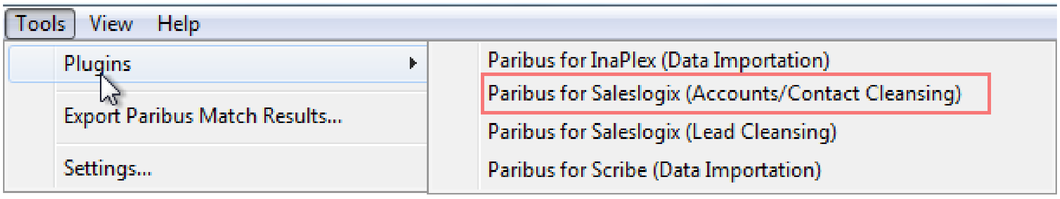
The Paribus Discovery for Saleslogix Component Plug-in

Processing of duplicate Saleslogix Accounts and Contact is all achieved using the Paribus Discovery for Saleslogix Component Plug-in.

The component plug-in has been especially written to operate with Saleslogix databases, and uses the Saleslogix application interface (SLAPI – Saleslogix version 5) and the Saleslogix OLE DB Provider (Saleslogix version 6).

The component plug-in ensures that all Saleslogix security and synchronisation requirements are fully considered.

Access to the Paribus Discovery for Saleslogix Component Plug-in is available from the main Paribus application. Select the Tools menu, Plugins and the **Paribus for Saleslogix (Account/Contact Cleansing)** option.



Paribus Discovery for Saleslogix Plug-in - Saleslogix Database Login

On selecting the Paribus for Saleslogix (Account/Contact Cleansing) menu option, this will present the Paribus Discovery for Saleslogix login dialog:

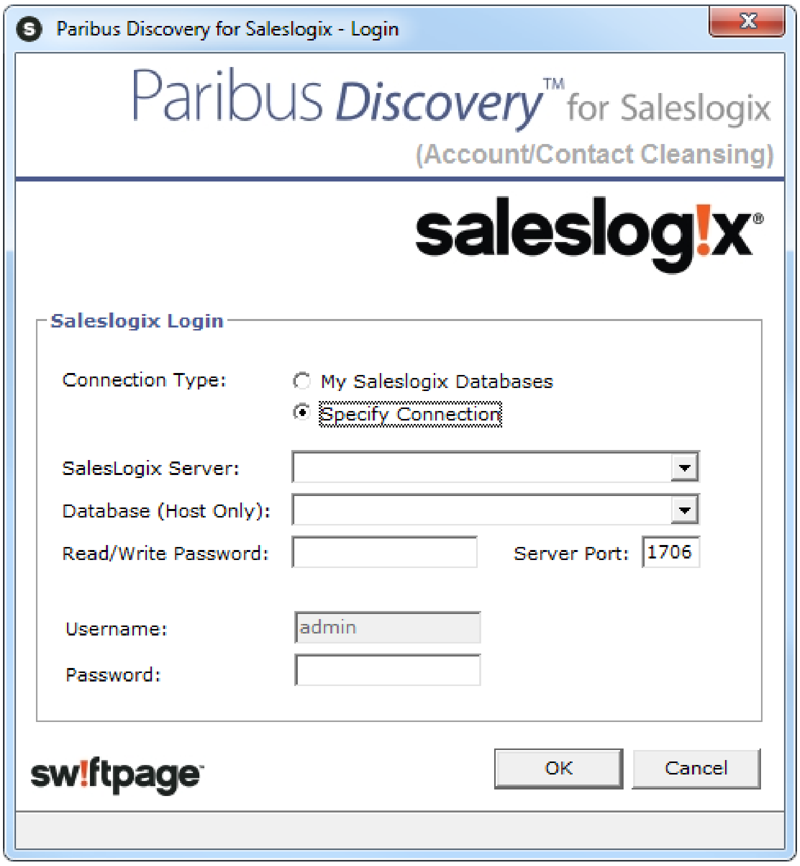


Figure 23 – Paribus Discovery for Saleslogix – Plugin Login Dialog

- The option buttons at the top enable you to select the connection type you wish to use when connecting to your Saleslogix database.

  My Saleslogix Databases provides a list of your predefined connections. **Specify Connection** enables you to specify the connection details you wish to use.
- The **Saleslogix Server** list provides a list of Saleslogix Servers that were automatically located on your network.
- The **Database** list provides a list of Saleslogix databases on the specified Saleslogix Server.

  Note: Due to the plug-ins ability to change/update data in your Saleslogix database, only host database are supported.
- The **Server Port** is the TCP/IP port number on which your Saleslogix Server is running. The default port number is **1706**.
- If your Saleslogix database has been given a Read/Write Password, specify it in the **Read/Write Password** field.
- Because of the plug-ins ability to change/update data in your Saleslogix database, the plug-in must connect using the Saleslogix administrator username (**admin**).

- The password field requires you to specify the password of the **admin** username.
- Clicking the **OK** button will proceed to log the plug-in into Saleslogix.

Important Note: Ensure when logging into Saleslogix from the Component Plug-in, you log into the same database that was used to generate the matches in your Paribus Match Session. Paribus does not and is not able to check this.

Paribus Discovery for Saleslogix – Setup Wizard

When running the Paribus Discovery for Saleslogix component plug-in for the very first time (or upgrading from a previous version of the plug-in), after the database login (see above) you will be greeted by the following Setup Wizard.

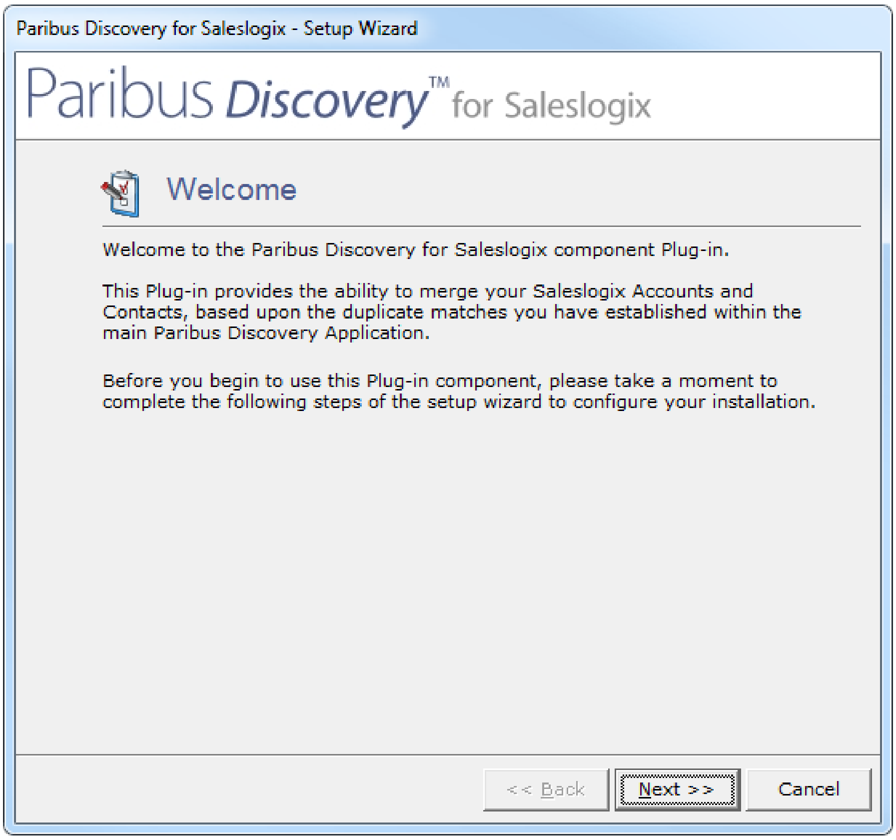


Figure 24 – Paribus Discovery for Saleslogix – Setup Wizard

The Setup Wizard will guide you through the necessary steps required to setup and configure your installation of the Paribus Discovery for Saleslogix component plug-in.

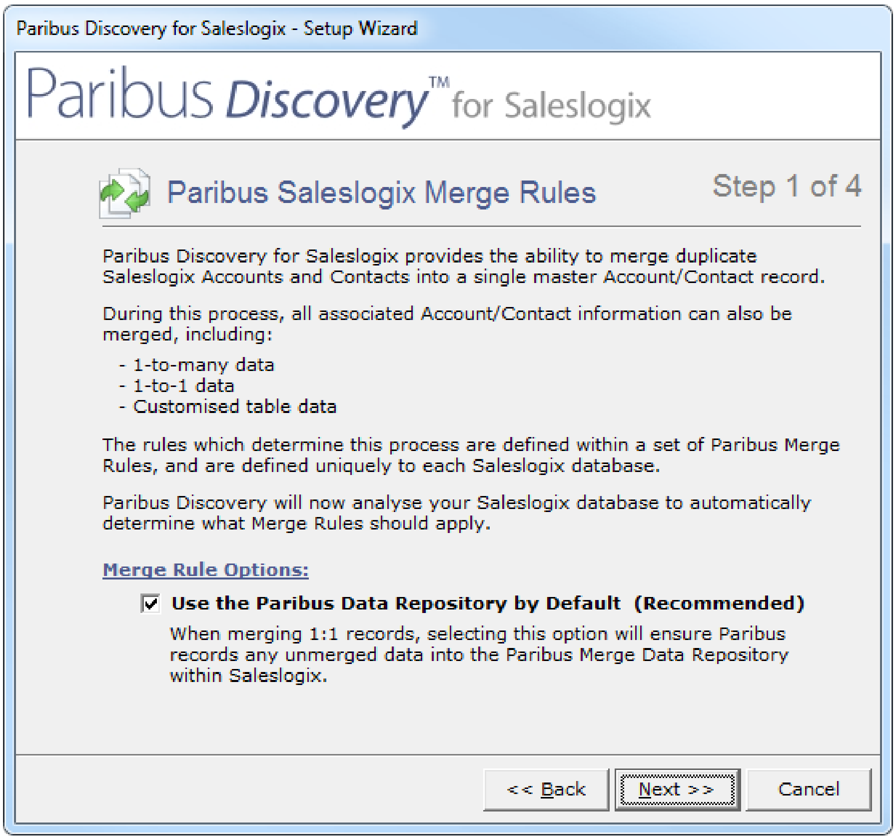


Figure 25 – Paribus Discovery for Saleslogix Setup Wizard – Step 1

The first step in the Setup Wizard will automatically define your Saleslogix Account and Contact Merge Rules. These rules define how master and duplicate Accounts and Contacts and their associated data will be merged by the Paribus Discovery for Saleslogix plug-in.

The Merge Rule option of “Use the Paribus Data Repository by Default” denotes that whenever Paribus automatically defines a 1:1 Merge Rule, that rule will record any unmerged data into the Paribus Data Repository. For more information on the Paribus Data Repository see page 82.

Clicking **Next >>** will begin the Merge Rules definition process.

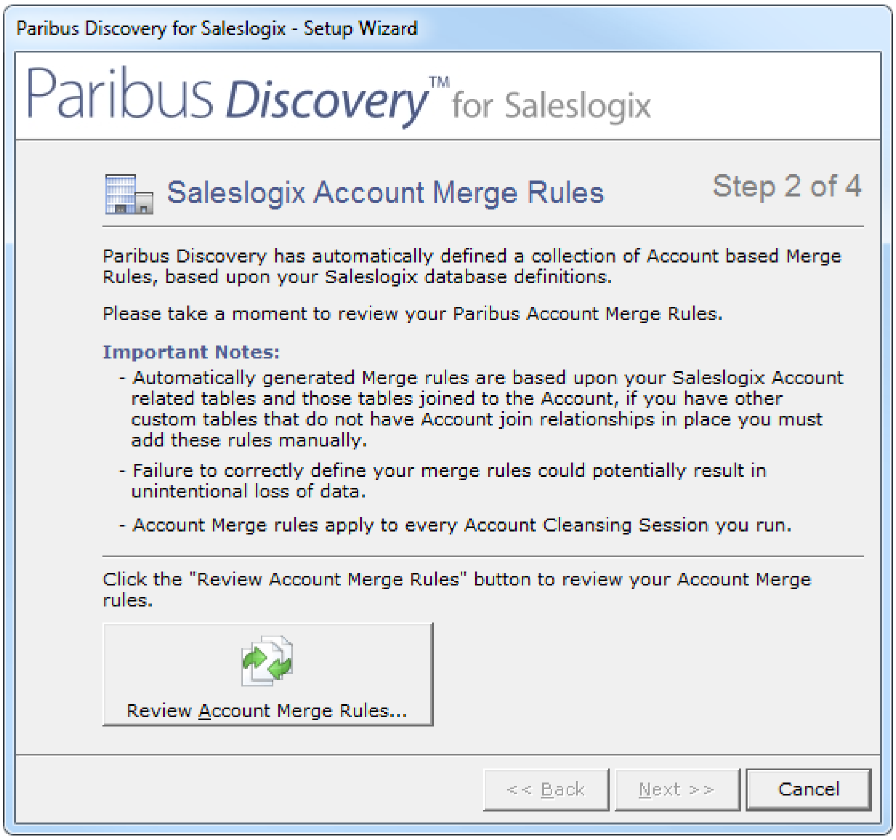


Figure 26 - Paribus Discovery for Saleslogix Setup Wizard – Step 2

The next step in the Setup Wizard is to review your Saleslogix Account Merge Rules. Paribus has automatically generated a default set of Account Merge Rules for you based upon your Saleslogix database system.

Important Note: It is essential that you review the Account Merge Rules to ensure you are satisfied with the rules defined.

For detailed information on defining your Paribus Account Merge Rules, see page 61.

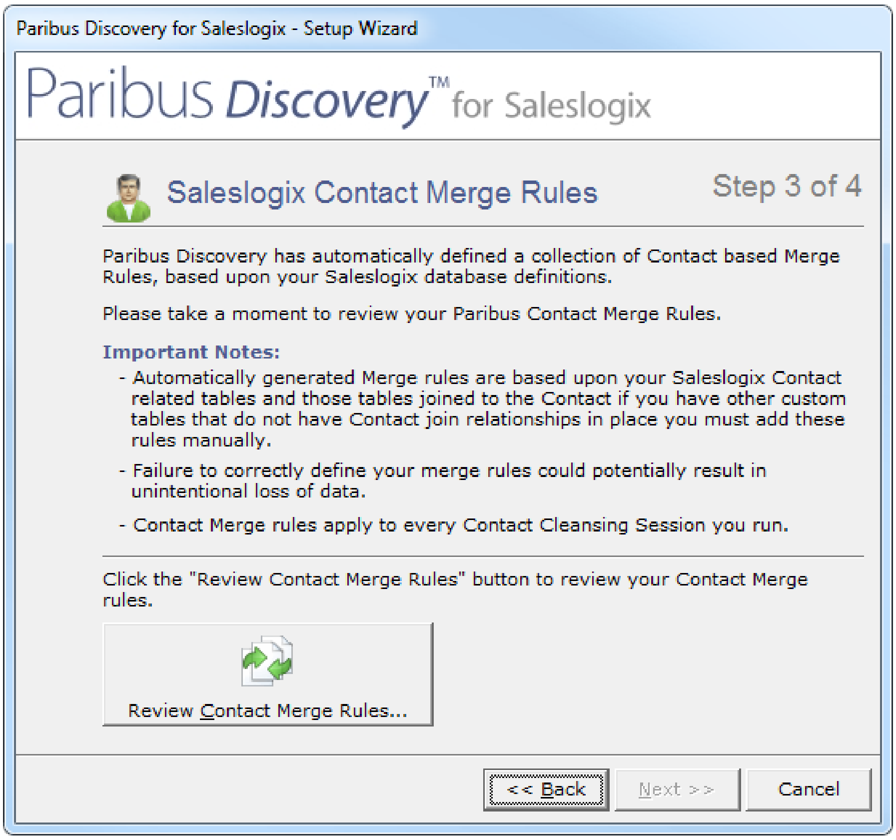


Figure 27 - Paribus Discovery for Saleslogix Setup Wizard – Step 3

The next step in the Setup Wizard is to review your Saleslogix Account Merge Rules. Paribus has automatically generated a default set of Contact Merge Rules for you based upon your Saleslogix database system.

Important Note: It is essential that you review the Contact Merge Rules to ensure you are satisfied with the rules defined.

For detailed information on defining your Paribus Contact Merge Rules, see page 61.

Paribus Discovery for Saleslogix – Plug-in Main Menu

Once the component plug-in has successfully logged into your Saleslogix database, the Plug-in main menu window is displayed.

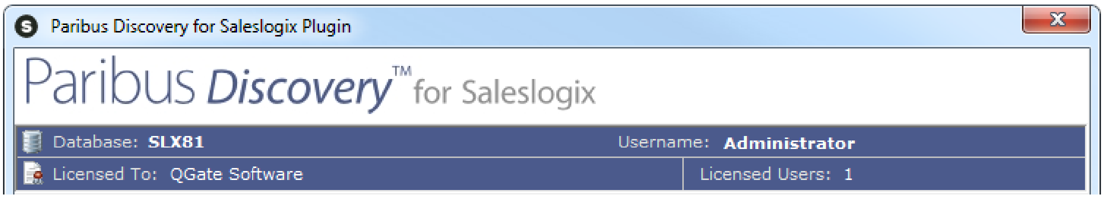


Figure 28 - Paribus Discovery for Saleslogix Plugin – Main Menu (Top)

The plug-in main menu provides access to the various features of the Paribus Discovery for Saleslogix Component Plug-in.

Match Reports Tab

The Match Reports Tab provides access to the Saleslogix duplicate reports, based upon the matches contained within your Paribus Match Sessions.

Figure 29 – Paribus Discovery for Saleslogix Plug-in – Reports Tab

Account Cleansing Tab

The Account Cleansing Tab provides the ability to cleanse your Saleslogix database of duplicate Account data, based upon matches you have identified within your Paribus Match Sessions.

This cleaning process is defined and managed through a definition known as a Cleansing Session. Cleansing Sessions define all the aspects of a cleansing and de-duplication process.

The Account Cleansing Tab provides the means to create, modify, delete and run Paribus Cleansing Sessions against your Saleslogix Account records.

As part of the standard Paribus Discovery for Saleslogix installation bundle, a sample Account Cleansing Session is provided, and is mapped by default to the Paribus Discovery for Saleslogix Sample Account Match Session.

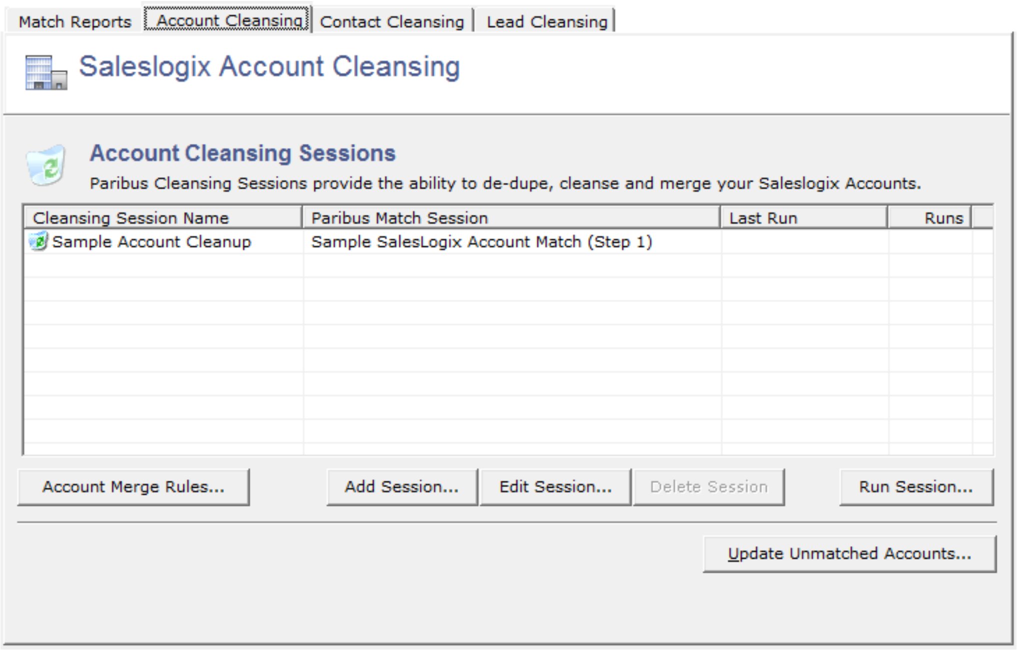


Figure 30 - Paribus Discovery for Saleslogix Plugin – Account Cleansing Tab

- The main section of the tab details a list of existing Cleansing Sessions.
- The **Account Merge Rules…** button provides access to editing the Account Merge Rules for Account Cleansing – see page 61.
- The **Add Session…** button enables you to create a new Cleansing Session – see page 51.
- The **Edit Session…** button enables you to edit an existing Cleansing Session – see page 51.
- The **Delete Session…** button enables you to delete an existing Cleansing Session.
  Note: Cleansing Sessions cannot be deleted once they have been applied to your Saleslogix database, as they hold the audit history of changes applied.
- The **Run Session…** button enables you to create a new Cleansing Session – see page 51.
  Note: Session can only be run once they have been fully defined.
- The **Update Unmatched Accounts…** button provides access to the Account Update feature. This enables the Account Type and Account Status values of unmatched Accounts to be updated – see page 76.

Contact Cleansing Tab

The Contact Cleansing Tab provides the ability to cleanse your Saleslogix database of duplicate Contact data, based upon matches you have identified within your Paribus Match Sessions.

This cleaning process is defined and managed through a definition known as a Cleansing Session. Cleansing Sessions define all the aspects of a cleansing and de-duplication process.

The Contact Cleansing Tab provides the means to create, modify, delete and run Paribus Cleansing Sessions against your Saleslogix Contact records.

As part of the standard Paribus Discovery for Saleslogix installation bundle, a sample Contact Cleansing Session is provided, and is mapped by default to the Paribus for Saleslogix Sample Contact Match Session.

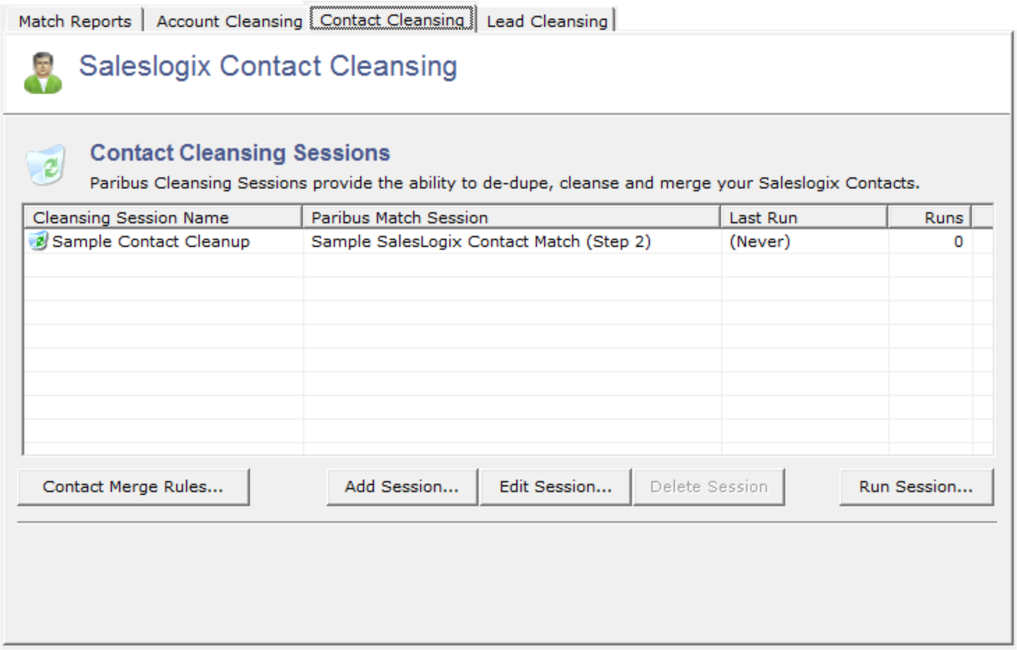


Figure 31 - Paribus Discovery for Saleslogix Plugin – Contact Cleansing Tab

- The main section of the tab details a list of existing Cleansing Sessions.
- The **Contact Merge Rules…** button provides access to editing the Contact Merge Rules for Contact Cleansing – see page 61.
- The **Add Session…** button enables you to create a new Cleansing Session – see page 51.
- The **Edit Session…** button enables you to edit an existing Cleansing Session – see page 51.
- The **Delete Session…** button enables you to delete an existing Cleansing Session.
  Note: Cleansing Sessions cannot be deleted once they have been applied to your Saleslogix database, as they hold the audit history of changes applied.
- The **Run Session…** button enables you to create a new Cleansing Session – see page 51.
  Note: Session can only be run once they have been fully defined.

The **Close** button will close the Paribus Discovery for Saleslogix Component Plug-in, and return you the main Paribus application.

Lead Cleansing Tab

The Lead Cleansing Tab in this Paribus Discovery plugin is for information reference purposes only, providing information as to where and how to use Paribus Discovery to process Saleslogix Leads.

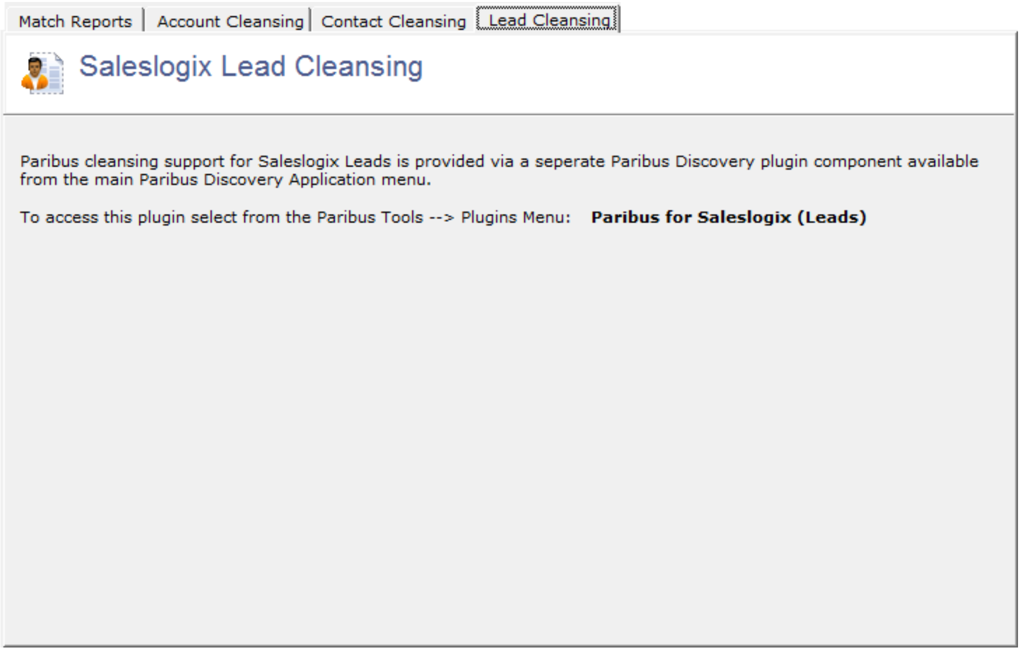


Figure 32 - Paribus Discovery for Saleslogix Plugin - Lead Cleansing Tab

Account/Contact Cleansing Sessions

This section details defining and managing your Paribus Cleansing Sessions for either an Account or Contact cleansing process.

For the ease of illustration, this section has been written to cover the defining of both Account and Contact Cleansing Sessions.

The purpose of a Paribus Cleansing Session is to defines and encapsulate everything about your cleansing process, including:

- The Name and details of your Cleansing Session.
- The Paribus Match Session (match results) to be processed.
- The processing rules by which to process your duplicate records.
- Maintain a historic audit of changes made to your Saleslogix database as a result of the Cleansing Session.
- Information and status on remote databases that have received the changes from the Cleansing Session.

Furthermore the Paribus Cleansing Session has been designed to assist you in the process of cleansing your Saleslogix database, with guidance and insight into what options and actions you should consider taking.

This guidance is designed to ensure you gain maximum benefit from the process and most importantly do not risk losing or corrupting your Saleslogix data.

Account/Contact Session Tab

The Account Session Tab provides the ability to name and describe your Paribus Cleansing Session.

The Session Status Check information provides a summary of the current status of the Session, together with recommendations on what actions and options might be most appropriate.

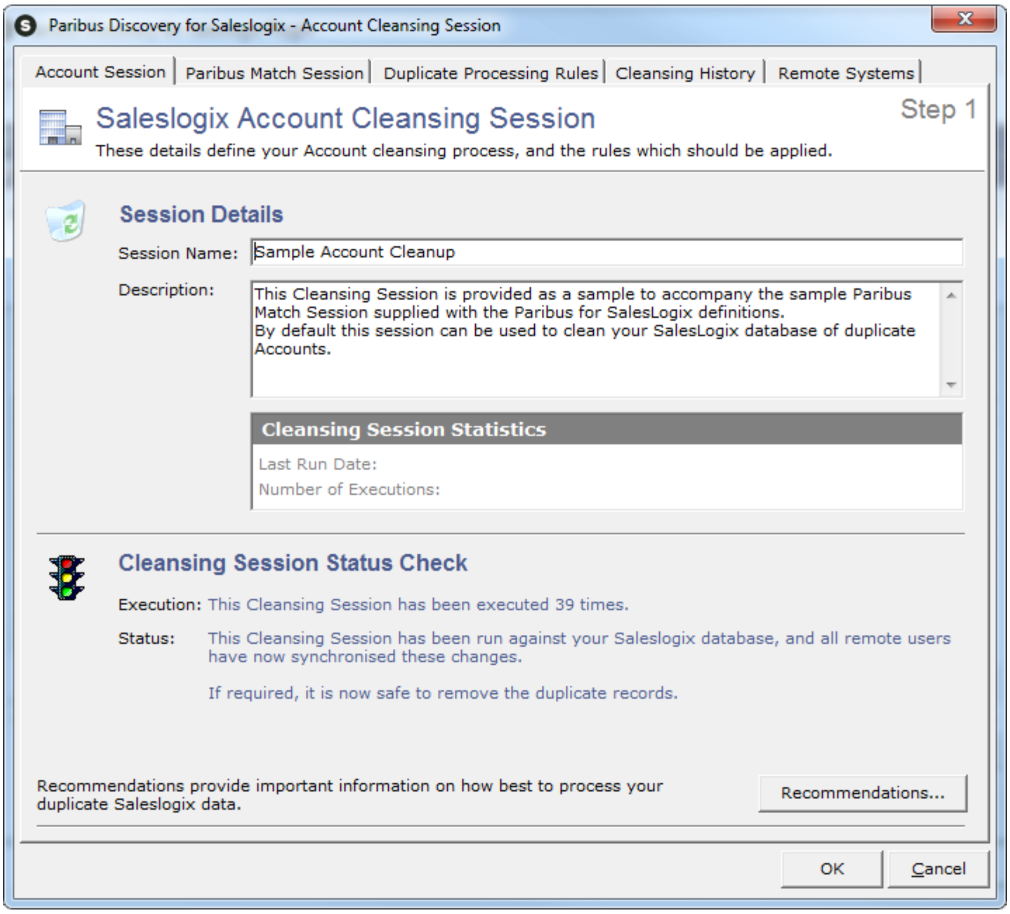


Figure 33 – Paribus Cleansing Session – Account/Contact Session Tab

The **Recommendations…** button provides access to important information on how to manage your Cleansing process in the context of remote database systems.

Paribus Match Session Tab

The Paribus Match Session Tab provides the ability to associate a Paribus Match Session (set of match results) with your Cleansing Session.

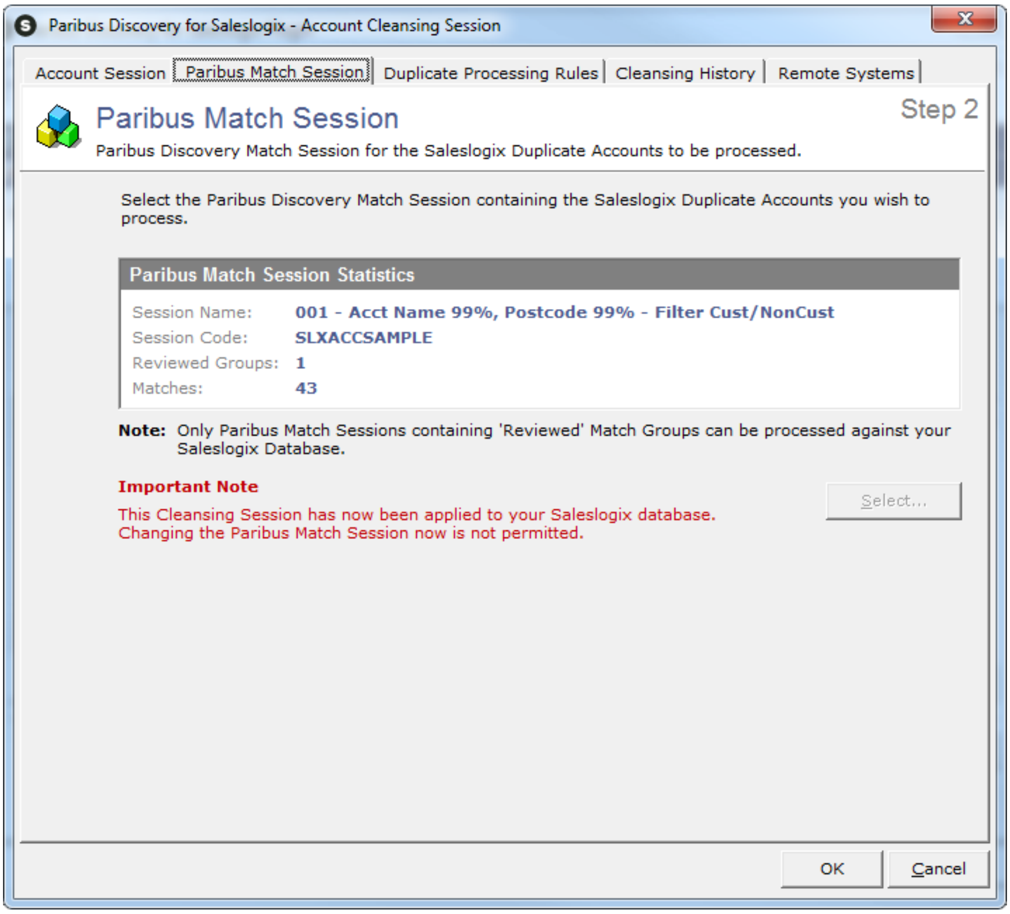


Figure 34 – Paribus Cleansing Session – Paribus Match Session Tab

To select a Paribus Match Session, click the **Select…** button. The Paribus Match Session you chose must contain an appropriate set of match results for the purpose of your Cleansing Session (i.e. Account cleansing will require a set of Account match results).

The Paribus Match Session selected must also contain a collection of “Reviewed” Group Members, as only Match Groups that have been reviewed will be processed by your Cleansing Session – see *Reviewing your Saleslogix Match Results* on page 35 for more details.

Once a Cleansing Session has been processed against your Saleslogix database, you cannot change the associated Paribus Match Session.

Duplicate Processing Rules Tab

The Duplicate Processing Rules Tab contains the processing rules to be applied to your Saleslogix Accounts or Contacts during the cleansing process.

For the ease of illustration, this section has been written to cover defining both Account and Contact Duplicate Processing Rules.

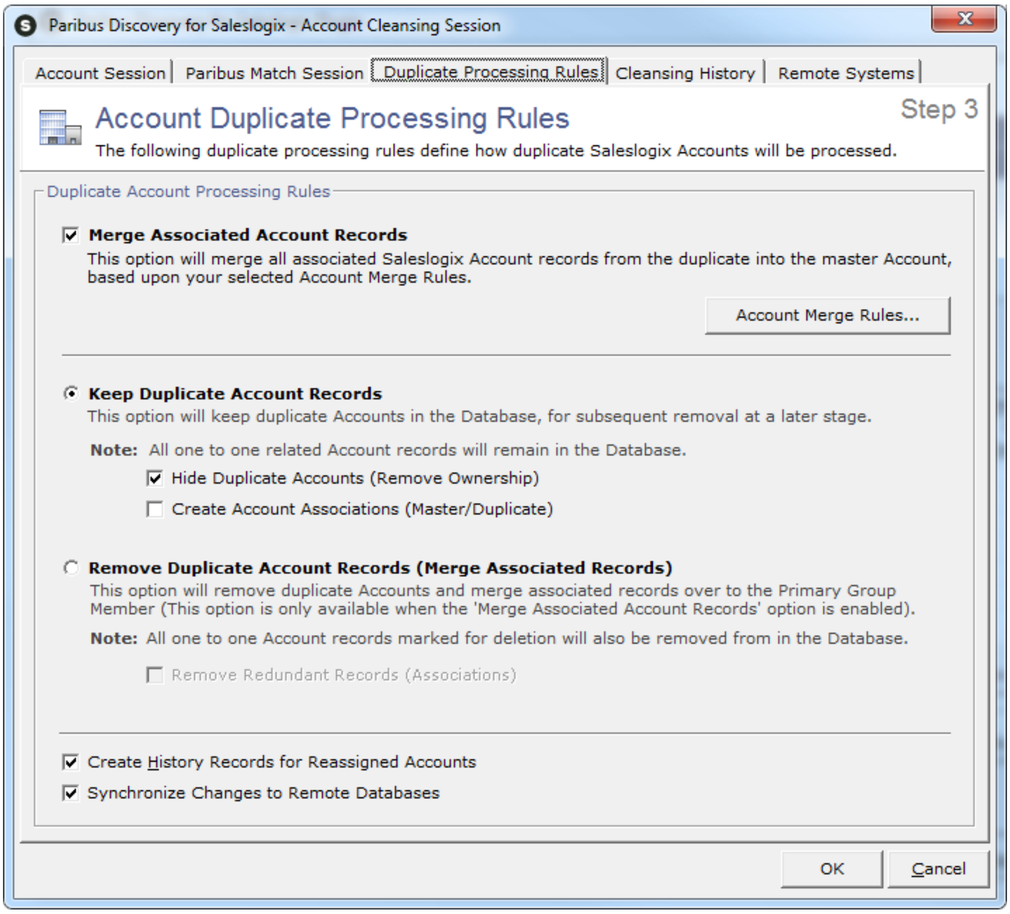


Figure 35 – Paribus Cleansing Session – Duplicate Processing Rules Tab

Merging Associated Account or Contact Records

An important consideration when removing duplicate Accounts or Contacts from your Saleslogix database is what to do with the associated records (e.g. Contacts, Opportunities, Activities, History etc).

The Component Plug-in provides a very powerful feature, which enables you to merge all associated one-to-one and one-to-many related Account or Contact records, across to the Master Account or Contact. This feature provides a true consolidation of your Account/Contact data, whilst ensuring no records are left unrelated (orphaned) once the duplicate Account or Contact has been removed.

Account/Contact Merge Rules

When merging Accounts or Contacts using the Paribus Discovery for Saleslogix component plug-in, you have full control over what associated tables and records are merged and how.

To review and define your Account or Contact Merge Rules, click the **Account/Contact Merge Rule…** button.

Important Note: The Account and Contact Merge Rules are defined globally and apply to all Paribus Cleansing Sessions. Changing your Merge Rules will effect all the Cleansing Sessions you run.

For more information on Account and Contact Merge Rules, see page 61.

Keeping or Removing Duplicates Accounts or Contacts

The main rule for processing duplicate Saleslogix Accounts or Contacts is that of keeping or removing the duplicate records.

Keeping of duplicates will allow the duplicate records to remain in your Saleslogix database. In addition, duplicate records can be optionally hidden from view of Saleslogix users, and/or Associations can be automatically built between them (as Master and Duplicate).

Alternatively, duplicate records can be removed from the database entirely.

Important Considerations for Duplicate Removal

Duplicates cannot be removed from your Saleslogix system if any of the following conditions apply:

- If all associated data (i.e. Contacts, Opportunities, Activities, History etc) is not being merged.
- If changes are to be synchronised and the cleansing process has not been run for the first time.
- If changes are to be synchronised but not all remote database systems have synchronised to collect changes (this rule can be overridden if necessary).

The option of keeping or removing duplicate Accounts or Contacts is a very important consideration, especially if you are using Saleslogix remote databases – see the section on *Considerations for Synchronised Databases* on page 69.

Keep Duplicate Account/Contact Records

This option will keep the duplicate Account or Contact in your Saleslogix database.

Optionally (and recommended) you can merge associated Account/Contact records, whilst keeping the duplicate Account or Contact in place – see above.

Hide Duplicate Accounts/Contacts (Remove Ownership)

This option will remove the Saleslogix Account or Contact ownership from the duplicate Account/Contact record, thus making the Account or Contact hidden from standard Saleslogix users. This is achieved by changing the Account or Contacts SECCODE value to “QGATEPARIBUS”.

This option is only available when keeping duplicate Account/Contact records.

Create Account/Contact Associations (Master/Duplicate)

This option will automatically create an Account or Contact association between the Master and Duplicate Account or Contact records. This association is also removed when the duplicate Account or Contact is finally removed.

This option is only available when keeping duplicate Account/Contact records.

Remove Duplicate Account/Contact Records (Merge Associated Records)

This option will permanently remove the duplicate Account or Contact from your Saleslogix database.

This option is only available when the following conditions apply:

- If all associated data (i.e. Contacts, Opportunities, Activities, History etc) is not being merged.
- If changes are to be synchronised and the cleansing process has not been run for the first time.
- If changes are to be synchronised but not all remote database systems have synchronised to collect changes (this rule can be overridden if necessary).

Remove Redundant Records (Associations)

This option will remove any redundant records when removing duplicate Accounts/Contacts. This includes Associations; History; Paribus Audit records.

This option is only available when removing duplicate Account/Contact records.

Create History Records for Reassigned Accounts/Contacts

This option will automatically create a Saleslogix History record (Note) for each duplicate Account/Contact that was reassigned to the master Account/Contact.

Synchronize Changes to Remote Databases

This option is a very important one to consider. When enabled will ensure all changes are synchronized to remote Saleslogix databases.

Warning! – Only disable this option if you are not and have never used remote Saleslogix databases.

For more information on considering synchronization, see the section *Considerations for Synchronised Databases* on page 69.

Cleansing History Tab

The Cleansing History Tab contains the following two elements:

Cleansing Audit History: A list of historic Audit reports documenting the cleansing processes (data merges) performed by this Cleansing Session. Each Audit report contains a complete audit history of the changes that were applied to your Saleslogix database.

Process Accounts/Contacts: A list of Accounts or Contacts that were processed by this Cleansing Session. Each Account or Contact listed documenting its status and date of last processing.

The search facility provides a means of quick searching for a particular Account or Contact in the list.

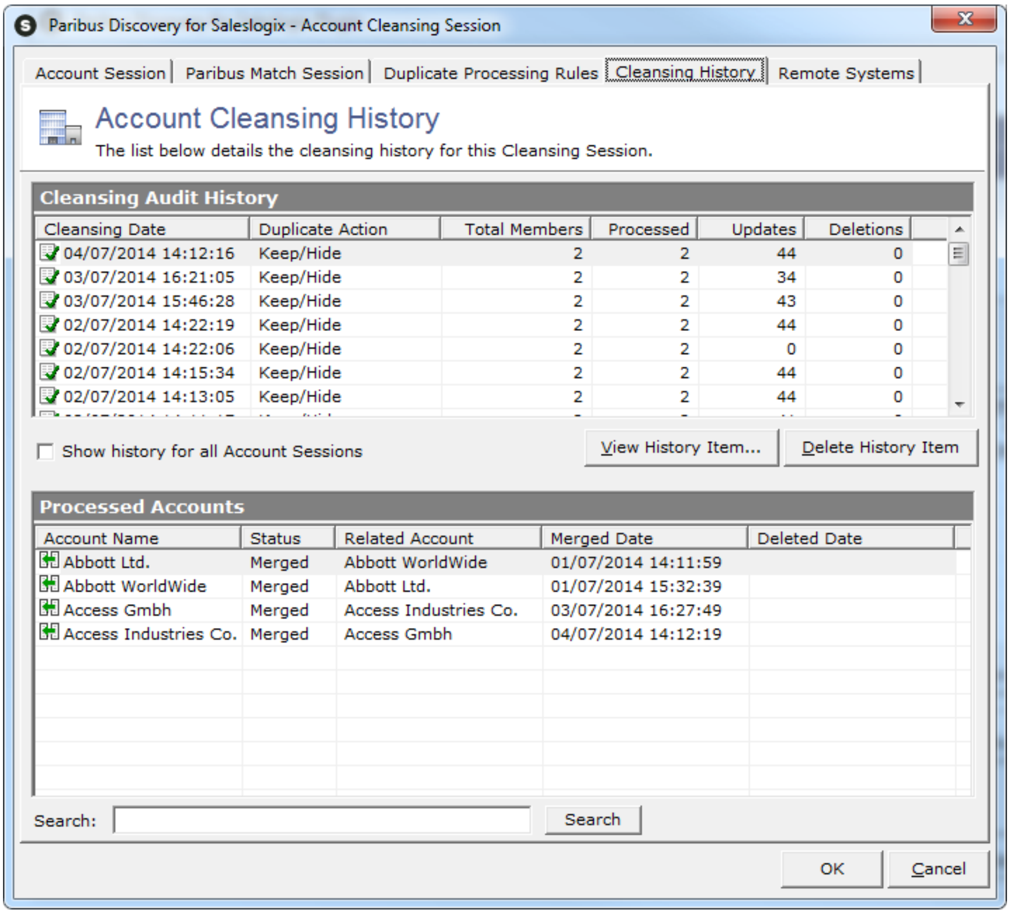


Figure 36 – Paribus Cleansing Session – Cleansing History Tab

In summary the Audit History items detail the date of the cleansing run, the Paribus Match Session (match results) that were applied, the Paribus Session Code and whether duplicate records were kept or removed.

To view an item of history, select the item and click the **View History Item…** button. Double-clicking the item in the list will also view the item.

To delete an item of history, select the item and click the **Delete History Item b**utton.

If you wish to view a list of all cleansing history for Accounts or Contacts (depending upon the type of Cleansing Session you are editing), check the **Show history for all Account Sessions** checkbox.

Remote Systems Tab

The Remote Systems Tab contains a list remote Saleslogix systems (remote users and remote offices), that synchronise with the main host database.

The remote systems listed display the name of the remote system (user or office), and the date of their last synchronisation.

The Paribus Discovery for Saleslogix component checks each synchronisation date with the last run date of the Cleansing Session, to determine which systems have received the changes made by this Session. Items listed in red denote systems that have not yet received/applied these changes.

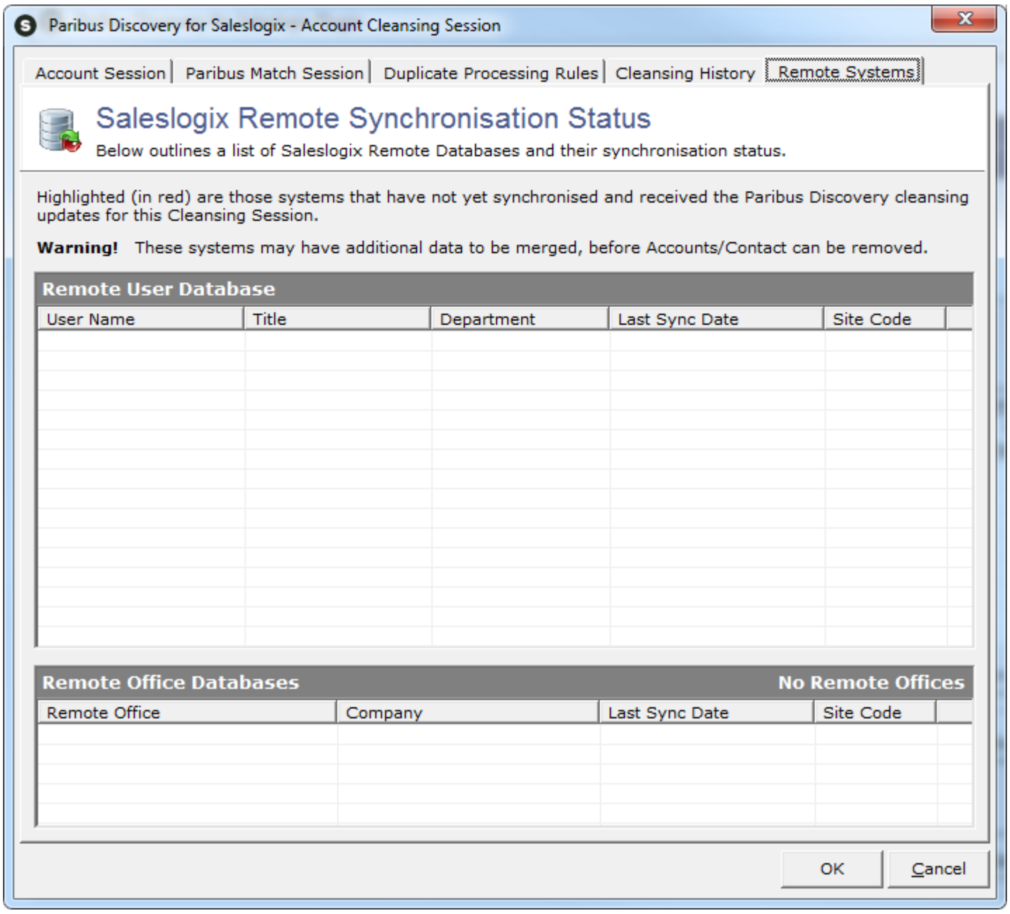


Figure 37 – Paribus Cleansing Session – Remote Systems Tab

It is recommended utilising this tab to monitor and manage the synchronisation of changes made by this Cleansing Session.

It is highly recommended that any action to remove duplicate Accounts or Contacts on a synchronised installation of Saleslogix, is not actioned until all remote systems are fully synchronised with updated from previous executions of your Cleansing Session.

Naturally in practise sometimes not all systems can be synchronised in this way, however this tab provides a useful monitor to who and what systems are exposed should a duplicate deletion action be enforced.

Account and Contact Merge Rules

This section outlines the Account and Contact Merge Rules that are used by the Paribus Discovery for Saleslogix Component plug-in. These rules determine how your Accounts and Contacts are merge during a duplicate cleansing processing.

Important Note: The Account and Contact Merge Rules are defined globally and apply to all Paribus Cleansing Sessions. Changing your Merge Rules will effect all the Sessions you run.

An initial set of Account and Contact Merge Rules are automatically defined by the Paribus Discovery for Saleslogix component plug-in, during the initial setup process of the plug-in. These rules are built dynamically based upon your Saleslogix database, including any custom related tables.

The Account and Contact Merge Rules can be accessed whilst defining any of your Paribus Cleansing Sessions – see page 51.

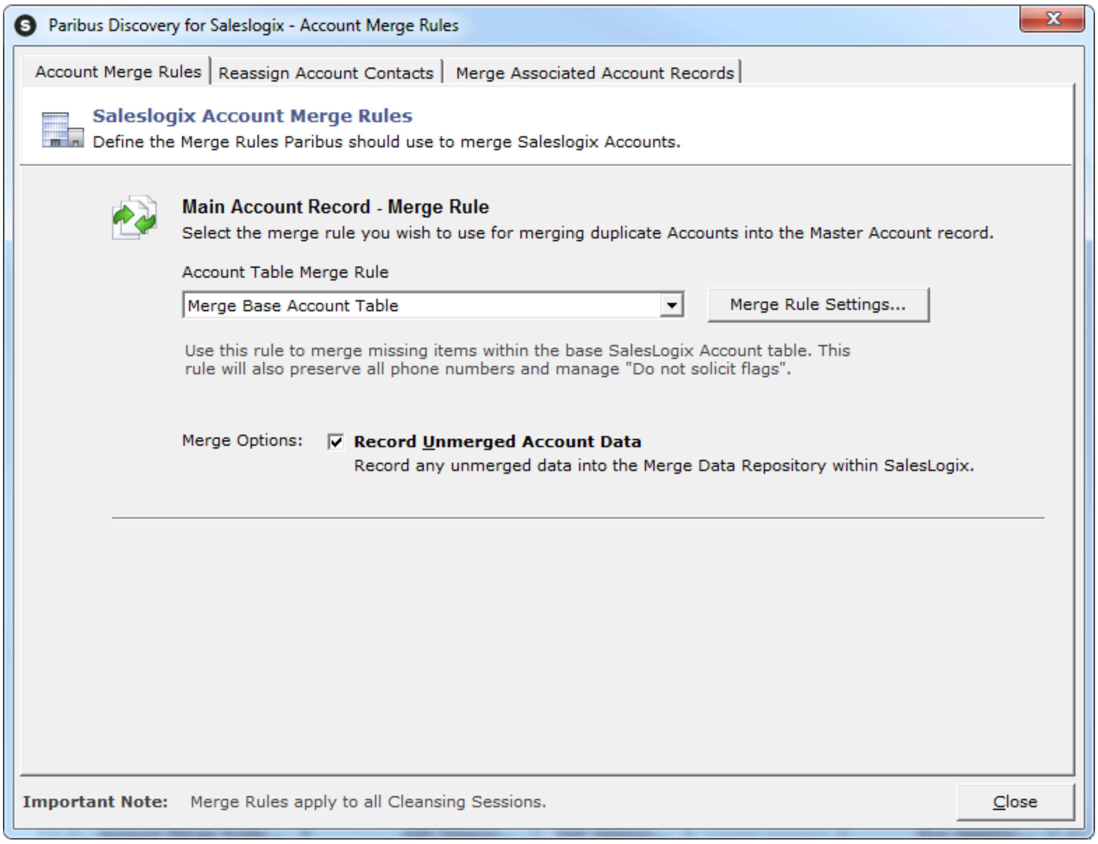


Figure 38 – Paribus Merge Rules – Account/Contact Merge Rules Tab

The Merge Rules Tab defines how merging of the main entity (Account or Contact) will be managed. When merging Accounts, additional options to denote how Saleslogix Contacts should also be merged (for Account merging only).

Main Account/Contact Record – Merge Rule

This defines the Paribus merge rule that will be used to merge data within the main Account or Contact table (ACCOUNT or CONTACT).

Selecting a Merge Rule here denotes what rule will be applied during this process – see Paribus Merge Rules on page 69 for a complete list of available Merge Rules.

The **Merge Rule Settings…** button provides access to advanced options for the selected Merge Rule (if available).

Record Unmerged Data

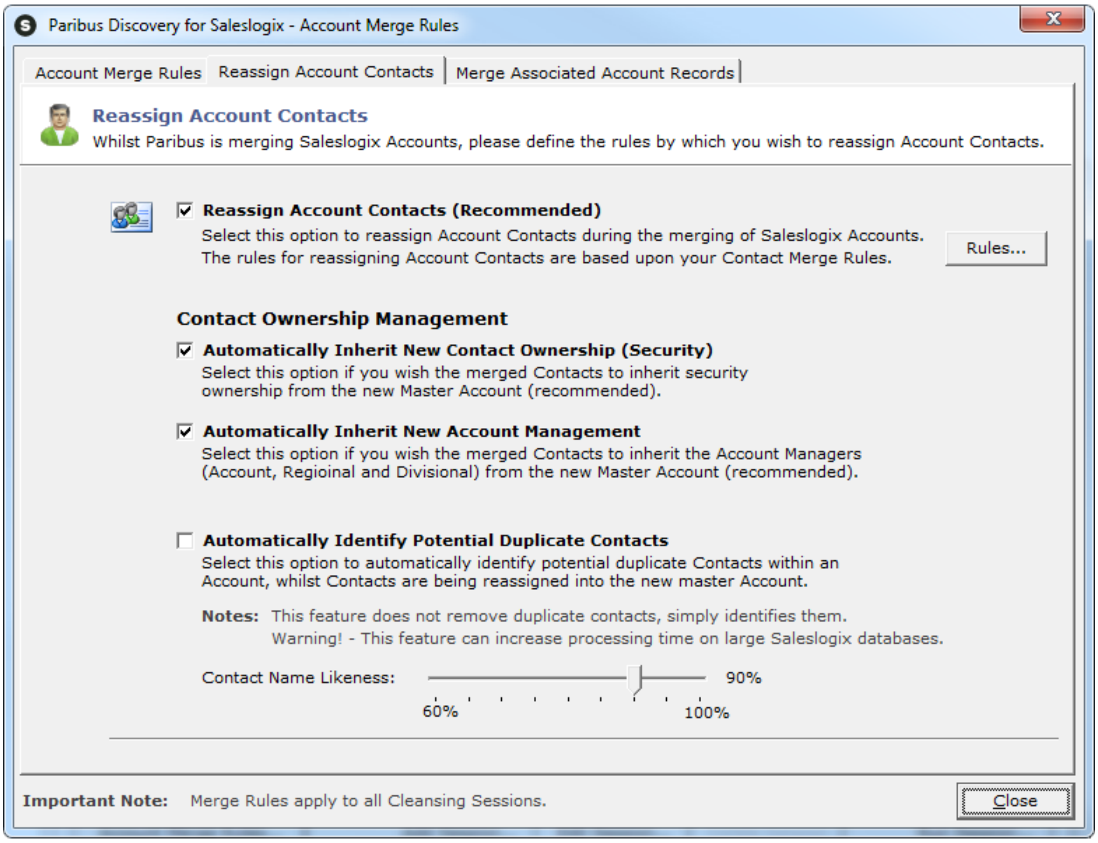
The option to **Record Unmerged Data** provides the ability to record any (1-to-1) data item from the duplicate record(s) that could not be merged into the master record, into the Paribus Data Repository. The Paribus Data Repository is a data store linked to Saleslogix Accounts and Contacts, which records any 1-to-1 duplicate data into a 1-to-many related Account or Contact record.

A practical example of how the Data Repository might be as follows:

"Say the master Account has a web site (e.g. www.QGate.co.uk), however one or other of the duplicates also has a different web site (e.g. www.QGate.com).

As the master Account already has a website, along with the duplicate, however each value different - using the Record Unmerged Data option will record the duplicate website into the Paribus Data Repository."

For more information on using the Paribus Data Repository, see page 82.



Reassign Account Contacts (Account Merge Rules Only)

This option denotes when merging Saleslogix Accounts, you wish the Paribus component plug-in to reassign all associated (duplicate) Account Contacts into the master Account.

In performing this operation, Paribus must also manage the reassignment of associated contact information (e.g. Contact Activities, History etc). The Contact rules which apply here are defined by the Contact Merge Rules. For this process to operate successfully, ensure your Contact Merge Rules are defined correctly.

To review and define your Contact Merge Rules, click the **Rules…** button.

Contact Ownership Management

When Paribus merges a Contact from one Account to another, it is also possible to request Paribus to change the Contact Ownership and Account Management properties of the merged Contact to inherit that of the new Master Account.

Automatically Inherit New Contact Ownership (Security): This option will change the security ownership (SECCODE) of the merged Contact to that of the Master Account.

Automatically Inherit New Account Management: This option will change the Account Managers (Account, Regional, and Divisional Account Manager) of the merged Contact to that of the Master Account.

Automatically Identify Duplicate Contacts (Account Merge Rules Only)

Enabling this option Paribus will attempt to automatically identify potential duplicate Contacts, whilst in the process of reassigning Contacts from duplicate Accounts. The match criteria used during this process is based upon the contacts name and Contact Name Likeness setting.

This feature does not automatically remove potential duplicate Contacts, but simply identifies them. The important reason they are <u>not</u> automatically removed is to ensure you have an opportunity to review the potential duplicates first.

Contact Name Likeness

The Contact Name Likeness setting denotes the degree of likeness a Contact name must be to be considered as a potential duplicate.

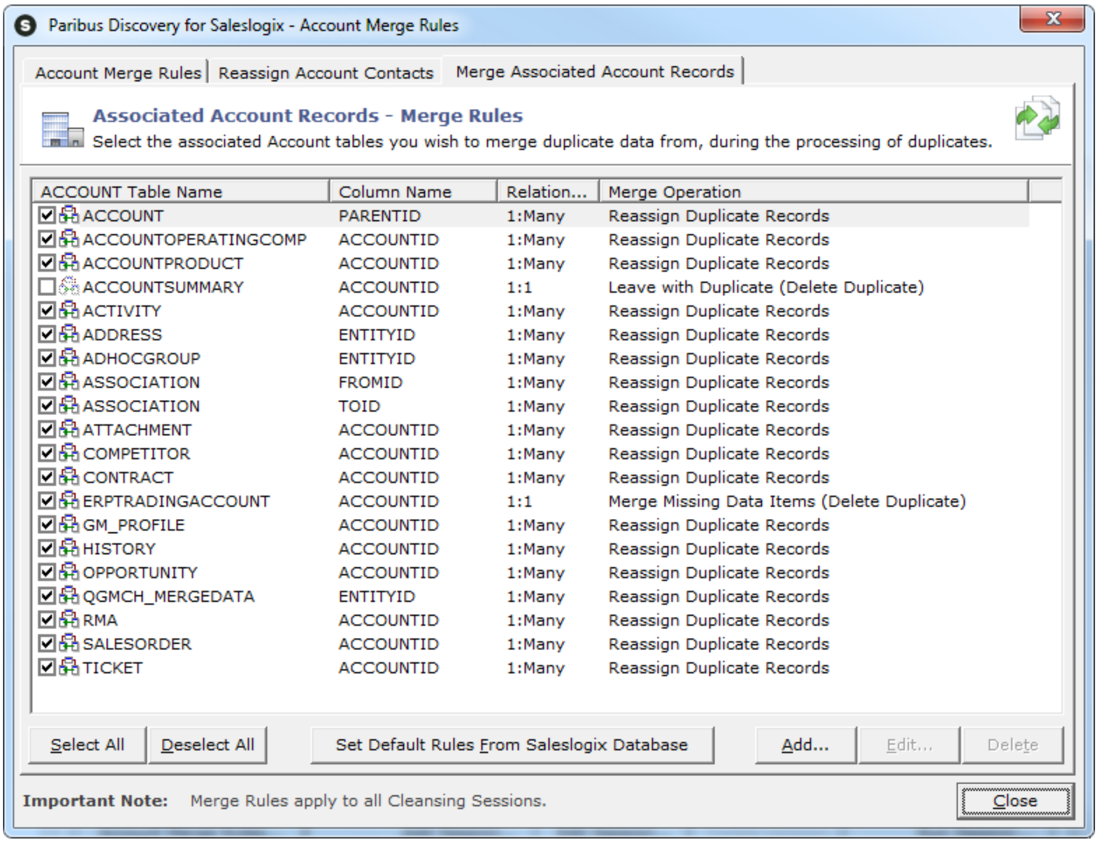


Figure 39 – Paribus Merge Rules – Merge Associated Account/Contact Records Tab

The Merge Associated Account/Contact Records Tab defines what additional Account or Contact related records will be merged during the Paribus cleansing processing (e.g. Activities, History, and Opportunities etc).

This Tab provides a list of Paribus Merge Rules (Saleslogix database tables) relating to Accounts or Contacts (depending upon which rules you are managing).

The check-box beside each Merge Rule denotes if this rule is enabled (checked). If you wish to exclude a particular rule, then uncheck this box.

The initial set of Paribus Merge Rules is automatically defined by the Paribus component plug-in, during the setup phase of the installation. These rules are established dynamically by the plug-in from your Saleslogix database system, and include any custom table relationships.

Important Note: Paribus Merge Rules should be re-generated whenever your Saleslogix database system changes (e.g. when new tables are added, or tables are removed). This process is managed automatically every time the Paribus Discovery for Saleslogix plug-in logs into your Saleslogix database, prompting to rebuild the Merge Rule when and where necessary.

Manual re-generation of the Paribus Merge Rules can be achieved at any time by clicking the **Set Default Rules From Saleslogix Database** button.

You may also add additional custom Merge Rules should the automated list of rules not include all relationships. This can be achieved by clicking the **Add…** button.

The Merge Operation column denotes the data manipulation operation that will be performed for a given table relationship, during the merging process. You can change this rule by clicking the **Edit…** button (see below).

Defining Merge Operations (1-to-Many Table Relationships)

If the merge operation relates to 1-to-many table relationship, when editing the operation the following dialog will be displayed:

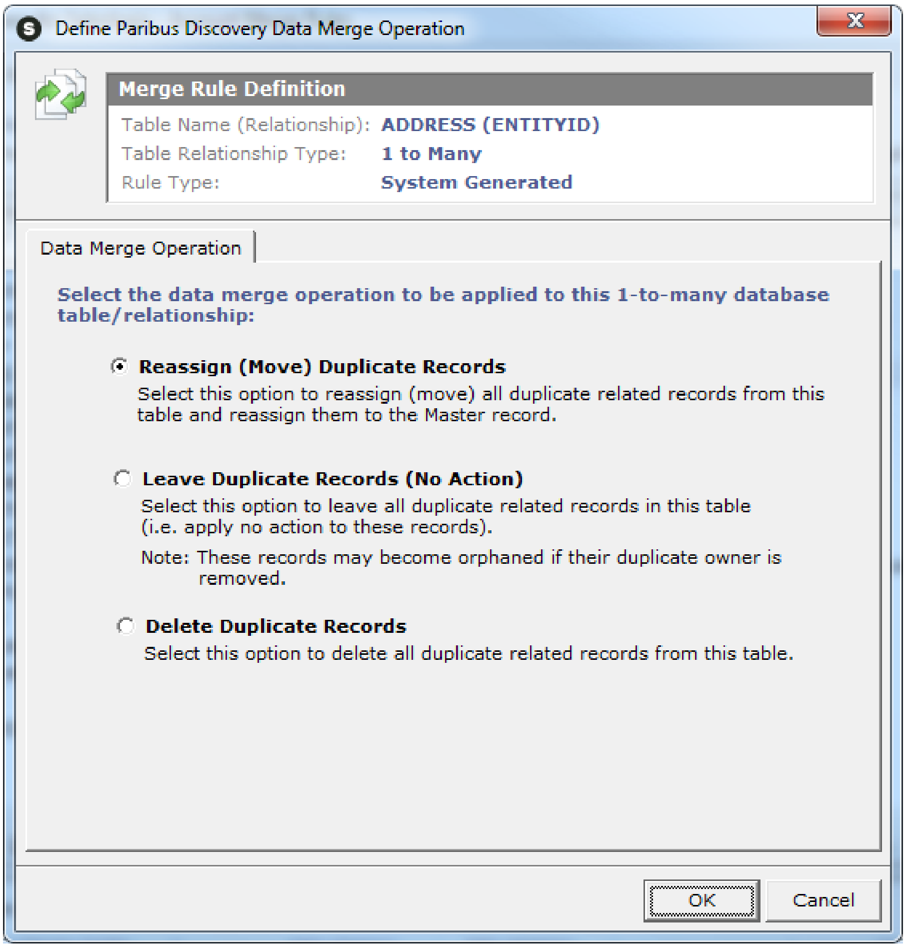


Figure 40 – Paribus Data Merge Operation (1-to-many) Edit Dialog

This dialog provides the mean to define the merge operation you wish to apply to a specific 1-to-many table relationship (outlined in the definition pane at the top of the dialog).

Note: This feature was a new feature added in version 1.4 of the Paribus Discovery for Saleslogix plug-in.

The merge options relating to a 1-to-many data merge operations are as follows:

Reassign (Move) Duplicate Records

This option is the default option and is recommended is most cases. Selecting this option will reassign (move) all duplicate related records within this table over to their respective master entity.

Leave Duplicate Records (No Action)

This option provides the ability to leave duplicate related records under the relationship of the duplicate entity. This option is essentially the same as disabling the merge rule.

The use of this option is likely when a table relationship is automatically discovered by the Paribus plug-in, however no action is required.

An example case for utilising this option might be the requirement to leave history and activity information relating to the duplicate entity and not have this reassigned to the master entity.

Warning Note: When leaving duplicate related records, these values may well become orphaned when their duplicate entity is removed. If this is not required, you may wish to consider one of the other merge operations.

Delete Duplicate Records

As the name suggests, this option will simply delete all duplicate related records for this table relationship.

An example case for utilising this option would be for any duplicate related data that is not required to be reassigned to the master entity, and is no-longer required in the system.

Defining Merge Operations (1-to-1 Table Relationships)

If the merge operation relates to 1-to-1 table relationship, when editing the operation the following dialog will be displayed:

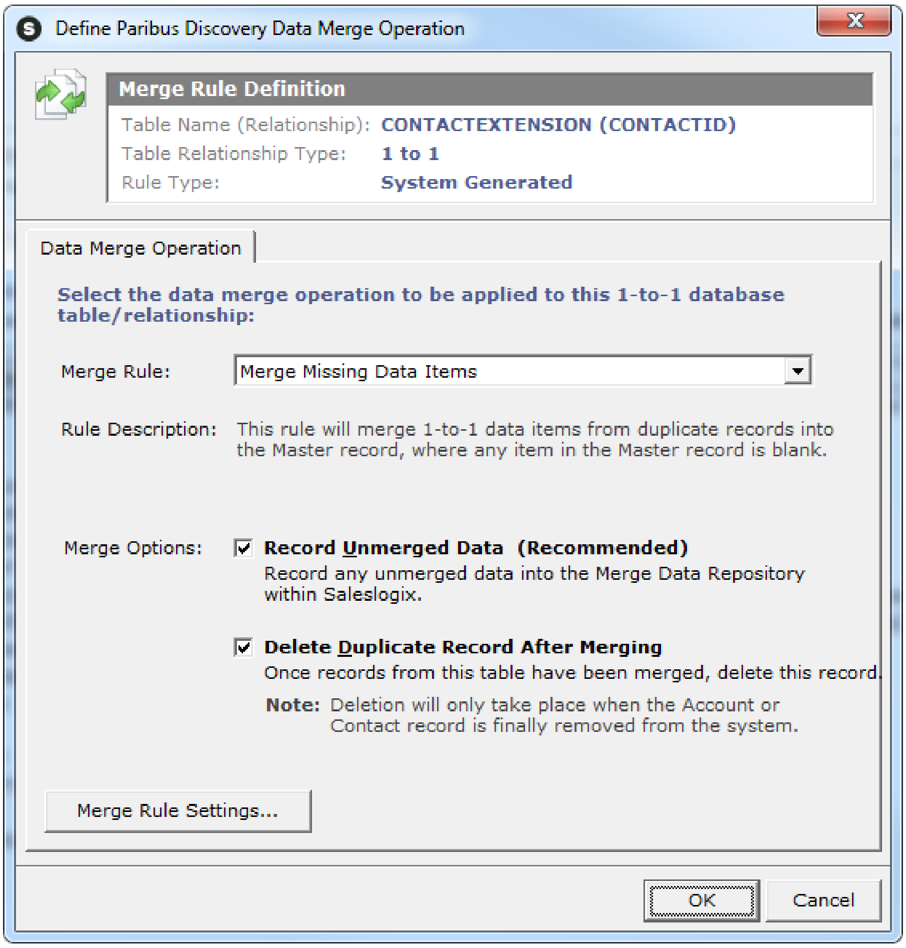


Figure 41 – Paribus Data Merge Operation (1-to-1) Edit Dialog

This dialog provides the mean to define the merge operation you wish to apply to a specific 1-to-1 table relationship (outlined in the definition pane at the top of the dialog).

Selecting a Merge Rule here denotes what rule will be applied during the processing of this table – see Paribus Merge Rules on page 69 for a complete list of available rules.

The **Merge Rule Settings…** button provides access to advanced options for the selected Merge Rule (if available).

Record Unmerged Data

The option to **Record Unmerged Data** provides the ability to record any (1-to-1) data item from the duplicate record(s) that could not be merged into the master record, into the Paribus Data Repository. The Paribus Data Repository is a data store linked to Saleslogix Accounts and Contacts, which records any 1-to-1 duplicate data into a 1-to-many related Account or Contact record.

A practical example of how the Data Repository might be as follows:

“Say the master Account has a web site (e.g. www.QGate.co.uk), however one or other of the duplicates also has a different web site (e.g. www.QGate.com).

As the master Account already has a website, along with the duplicate, however each value different - using the Record Unmerged Data option will record the duplicate website into the Paribus Data Repository.”

For more information on using the Paribus Data Repository, see page 82.

Delete Duplicate Records After Merging

The option to **Delete Duplicate Records After Merging** denotes that Paribus will delete any duplicate data in this table relationship during the final cleansing and duplicate removal process.

Note: The deletion of duplicate data does not occur until your Cleansing Session Processing Rules are set to Delete Duplicate Account/Contact – see

Duplicate Processing Rules Tab section on page 55.

Paribus Merge Rules

Paribus provides a collection of standard Merge Rules for merging 1-to-1 related Saleslogix data. These are outlined in the following table.

Merge Rule Name	Description
Merge Base Account Table	Use this rule to merge missing items within the base Saleslogix Account table. This rule will also preserve all phone numbers and manage "Do not solicit flags".
Merge Base Contact Table	Use this rule to merge missing items within the base Saleslogix Contact table. This rule will also preserve all phone numbers and manage "Do not solicit flags".
Merge Missing Data Items	This rule will merge 1-to-1 data items from duplicate records into the Master record, where any item in the Master record is blank.
Keep Newest Record	This rule will overwrite 1-to-1 Master records with the duplicate, if the duplicate record is newer.
Merge Contact Lead Source	Use this rule to merge the Contact Lead Source table.

Custom Merge Rules

Paribus also provides the ability to develop custom merge rules to meet specific business needs for specific customer requirements.

If you have a particular or peculiar data structure requiring dedicated business logic to be applied during data merging, then custom merge rules can be developed to facilitate this.

For more information on custom merge rules, ask your Paribus software supplier for more details.

Considerations for Synchronised Databases

If you are using synchronised Saleslogix databases, you should observe the following consideration.

Scenario: If you remove a duplicate Account from the Saleslogix host database, this change must be synchronised to all the appropriate remote databases. However before this change takes place on the remote database, a remote user could attribute additional information to that Account (e.g. an Opportunity).

When the remote database is synchronised with the host, the two changes cross in the post. The remote receives the removal of the Account, and the host receives the additional Account information (e.g. Opportunity).

Problem: The host now has a record relating to a none-existing Account (orphaned), and the remote has an unrelated record (e.g. an Opportunity without an Account).

Solution: Paribus provides a solution to this problem by adopting the following process within your Cleansing Session, when processing your duplicate Accounts or Contacts:

1) Firstly process your duplicates with the following options:

2) Keeping duplicate Accounts or Contacts (with the option of hiding them from view of Saleslogix users).

3) Merge all associated Account or Contact information to the Master Account or Contact.

4) Then perform several sync cycles between your host and remote databases to ensure the duplicate processing changes are fully synchronised.

   Note: See the Remote Systems Tab within your Cleansing Session for an active status on synchronised databases.

5) Any items received from remote databases relating to duplicate Accounts or Contacts will now reside in the host database.

6) Repeat steps 1 to 3 again.

   Important! - Ensuring when re-running the process to use the same Paribus Match Session as before (see warning below).

   Note: Only records that were not previous processed will be included in subsequent re-runs of the process.

7) Repeat steps 1 to 3 until you are confident that:

8) All changes have been synchronised (back and forth)

9) No remote databases are creating orphaned data (because they are unable to utilise hidden Accounts/Contacts).

10) Finally re-run the Cleansing Session process again, however this time opting to delete the duplicate Accounts or Contacts.

    Important! - Ensuring when re-running the process to use the same Paribus Match Session as before (see warning below).

Important Warning! – Ensure you do not delete or modify the content of your Paribus Match Session whilst it is being used in the above process.

Cleansing Duplicate Saleslogix Accounts or Contacts

This section outlines the steps required to cleanse the duplicate Saleslogix Accounts or Contacts from your Saleslogix database that you identified in the previous sections of this guide.

Important Pre-requisites

Before proceeding with this section, you must have first achieved the following:

- Successfully set-up the Paribus Discovery for Saleslogix Component Plug-in
(page 12)
- Successfully defined a Paribus Match Session for identifying Saleslogix Accounts or Contacts (page 27)
- Successfully completed a review (or part review), of the Paribus Match Results within your Match Session (page 35).
- Successfully defined your Paribus Account and Contact Merge Rules (page 61).
- Successfully defined a Paribus Cleansing Session to outline the cleansing process (page 51).

Cleansing Duplicate Accounts or Contacts

To begin cleansing your Saleslogix database of duplicate Accounts or Contacts:

Cleansing Saleslogix Accounts

From the **Account Cleaning Tab** of the main Plug-in menu, select the Cleansing Session you wish to run and click the **Run Session…** button. This action will display the **Process Duplicate Saleslogix Accounts** wizard screen.

Cleansing Saleslogix Contacts

From the **Contact Cleaning Tab** of the main Plug-in menu, select the Cleansing Session you wish to run and click the **Run Session…** button. This action will display the **Process Duplicate Saleslogix Contacts** wizard screen.

For the ease of illustration, this section has been written to cover the processing of both Accounts and Contacts.

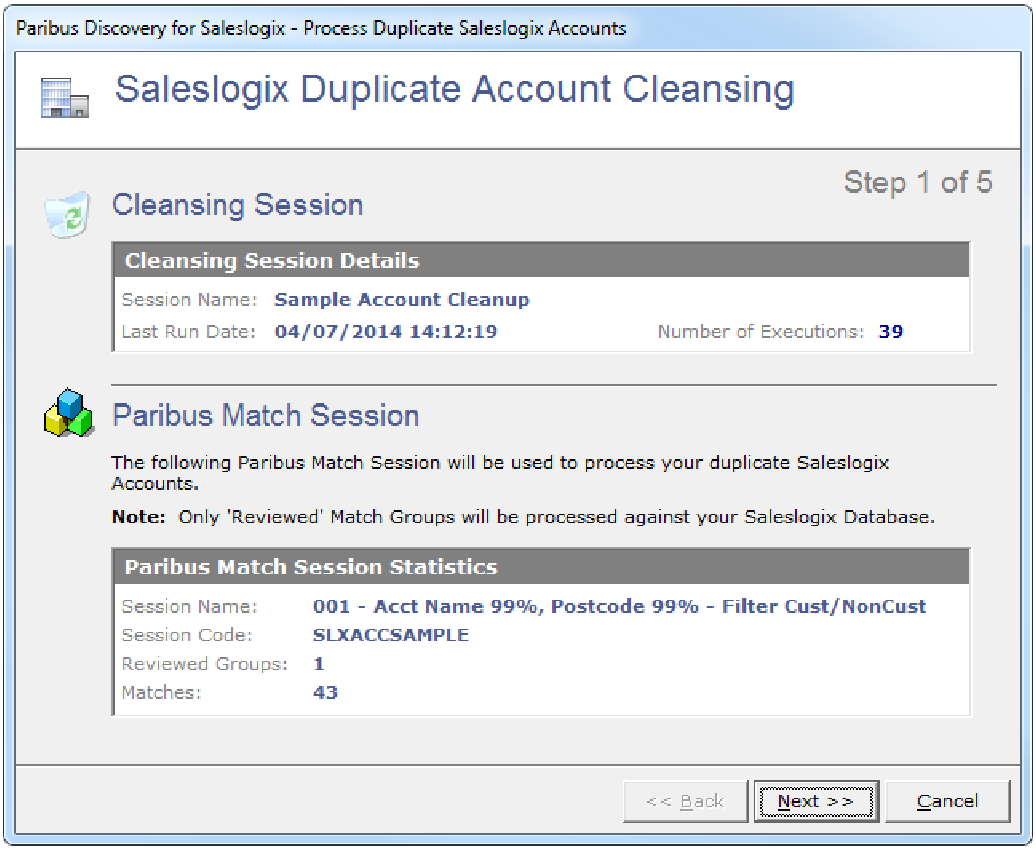


Figure 42 - Process Duplicate Saleslogix Accounts/Contacts - Step 1 of 5

This is the first of four steps, which defines the process of Account or Contact Duplication processing.

This screen provides an outline of your Paribus Cleansing Session and the Paribus Match Session (duplicate match results) that will be used to process your duplicate Accounts or Contacts.

Click the **Next >>** button to proceed to the next step. This action will display step 2 of 5.

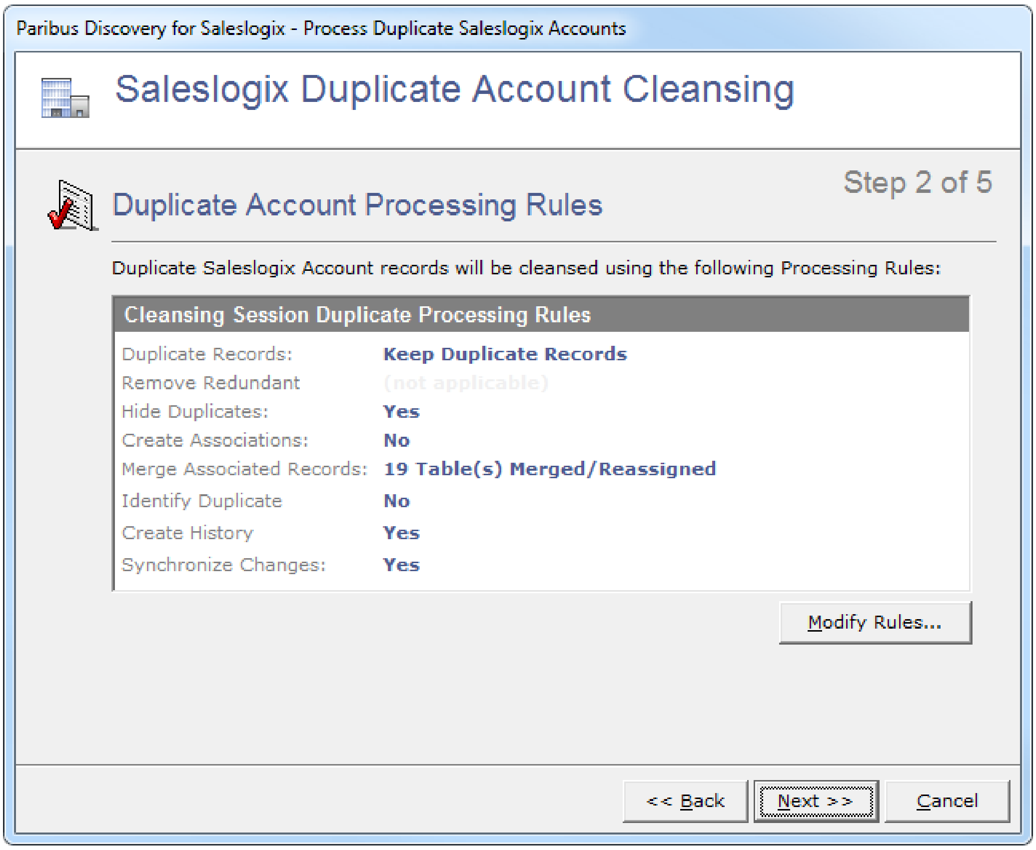


Figure 43 - Process Duplicate Saleslogix Accounts - Step 2 of 5

This step details the **Duplicate Account/Contact Processing Rules** that will be applied to your Account/Contact Duplication processing.

If you wish to modify the rules, click the **Modify Rules…** button. This action will display the Duplicate Processing Rules for this Cleansing Session – see page 55.

If you wish to return to the previous step, then click the **<< Back** button.

If you are happy with the Duplicate Account/Contact Processing Rules, click the **Next >>** button to proceed to the next step. This action will display step 3 of 5.

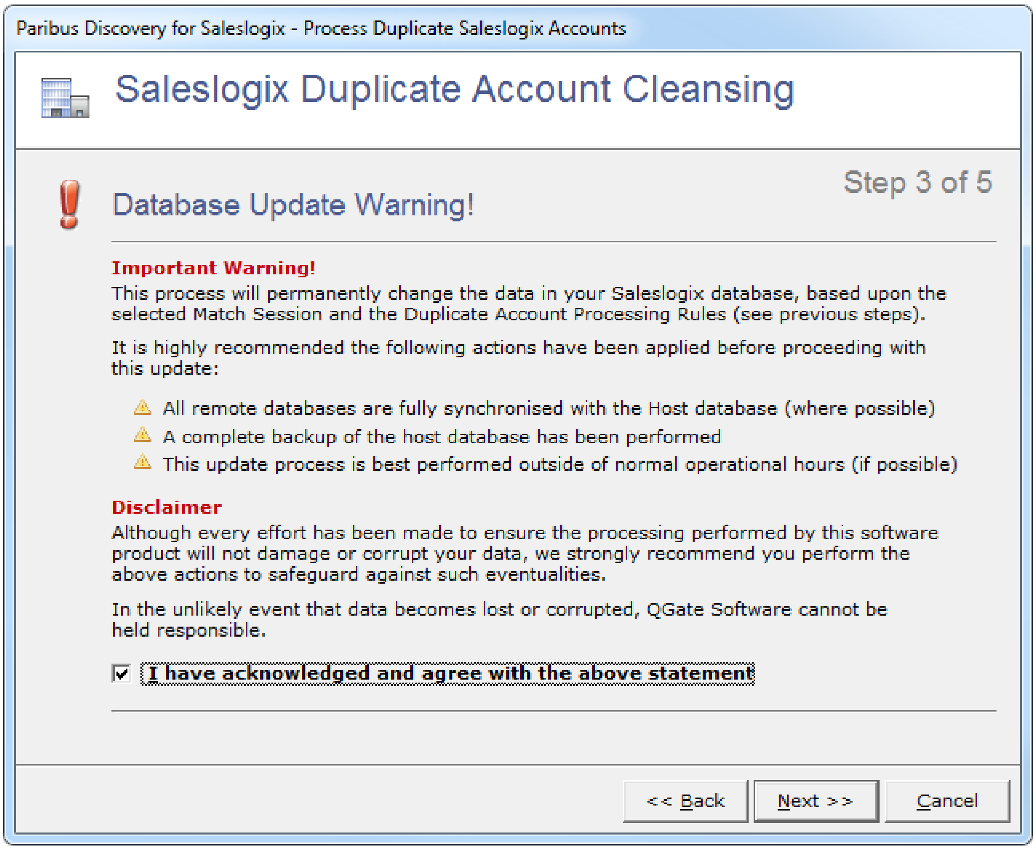


Figure 44 - Process Duplicate Saleslogix Accounts/Contacts - Step 3 of 5

This step provides a warning outlining this process will physically change the data within your Saleslogix database, and checks to ensure you have taken suitable precautions to ensure a disaster recovery can be achieve should anything go wrong.

Important Note: Please acknowledge the importance of this warning, and that although confident this process will not intentionally damage or corrupt your Saleslogix database, QGate Software cannot be held responsible.

To acknowledge acceptance of this warning, you must check the checkbox before proceeding to the next step.

If you wish to return to the previous step, then click the **<< Back** button.

Once you have acknowledged the warning, click the **Next >>** button to proceed to the next step. This action will display step 4 of 5.

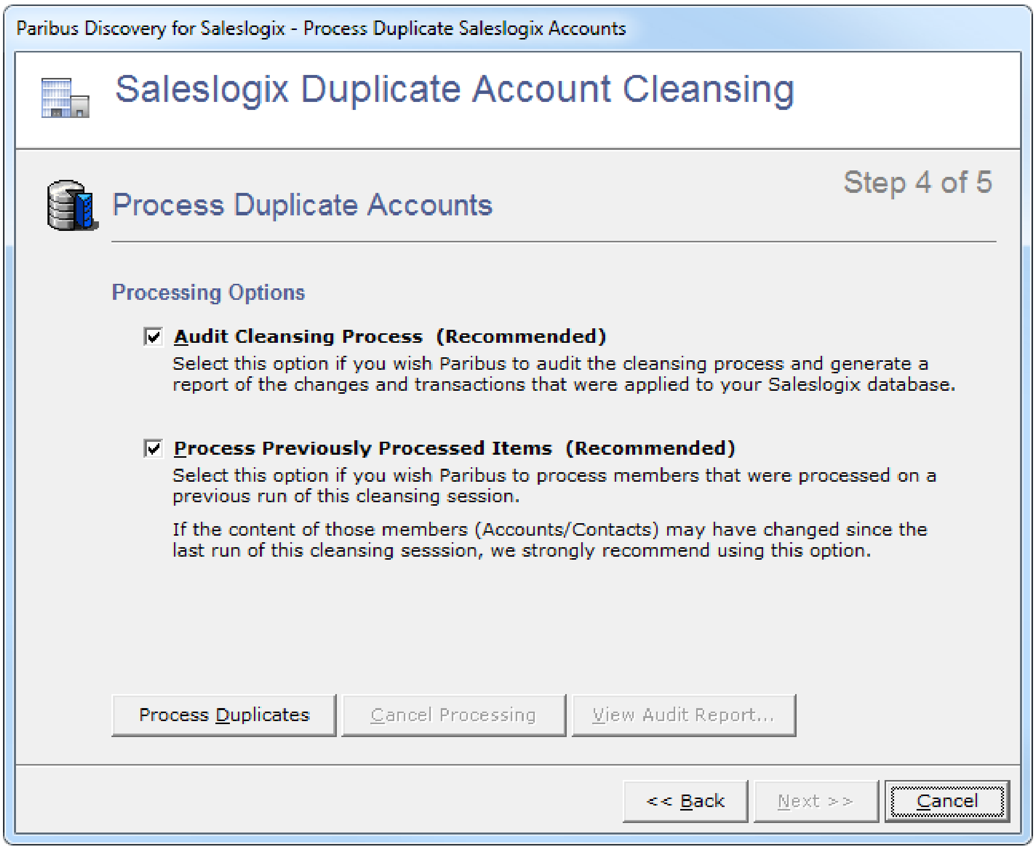


Figure 45 - Process Duplicate Saleslogix Accounts/Contacts - Step 4 of 5

The final step provides the ability to begin the duplicate cleansing process. This screen provides information of the process as it progresses through the match results of your Paribus Match Session.

Audit Cleansing Process

This option denotes you wish to generate the Audit Report, containing details of all the databases changes they are applied to your Saleslogix database. The default and recommended setting for this is enabled (checked).

Note (1): We highly recommend generating the Audit Report, as it provides very useful information to the changes that are applied, and provides an audit trail of the Account and Contact consolidations.

Note (2): If you are running the Paribus Discovery for Saleslogix Plug-in on a Saleslogix version 5 database the Paribus Auditor responsible for the auditing the cleansing process will present a dialog requesting database login information to your Saleslogix database. Please provide suitable logon credentials (e.g. SYSDBA).
The Paribus Auditor currently only supports Microsoft SQL Server.
This dialog will not appear when running on a Saleslogix version 6 or above database.

Process Previously Processed Items

This option denotes you wish to process items (Saleslogix Accounts or Contacts) that have been previous processed within this Paribus Match Session. The default and recommended setting for this is enabled (checked).

Process Duplicates

Clicking the **Process Duplicates** button will begin the duplicate cleansing process.

Cancel Processing

Once the process is underway, the **Cancel Processing** button is enabled. This allows the processing to be cancelled at any time.

Note: Processing will only be cancelled at the end of a suitable block of processing and not mid-stream. This ensures the changes made before cancellation, are valid and complete. Cancelling the process will **not** revert back any changes that have already been applied.

View Audit Report

Once the process has completed, clicking the **View Audit Report…** button will display the Audit Report (if the generation of the report was enabled). The Report Viewer window provides the means to optionally print and save the Audit Report.

Note: The Audit Report is automatically displayed at the end of the process.

Note: A complete copy of the audit report will be automatically saved into your Cleansing Session Process History – see page 58.

Once the process has completed (or cancelled), the **Close** button will close the **Process Duplicate Saleslogix Accounts/Contacts** screen.

Update Unmatched Accounts

This section details the Update Unmatched Accounts feature, which enable the Account Type and Account Status of all unmatched Saleslogix Accounts to be updated.

The purpose of updating unmatched Saleslogix Accounts is to provide a mechanism of singling out and identifying certain records for prospective marketing purposes.

e.g. If you have imported new Accounts into Saleslogix and have run Paribus to ensure they are not duplicates of existing Accounts, the unmatched records would signify new prospective Accounts.

Unmatched Accounts

Unmatched Accounts are all Account records from Data Set (A) of the Match Set, which did not match with any Accounts from Data Set (B) of the Match Set, during the match process.

Note: Unmatched Accounts are only recorded in the match process if the option of “Log Unmatched Records” is enabled in the Match Session settings – see page 33.

To access this feature return the Account Cleansing Tab on the main Paribus component plug-in menu, and click the **Update Unmatched Accounts**… button.

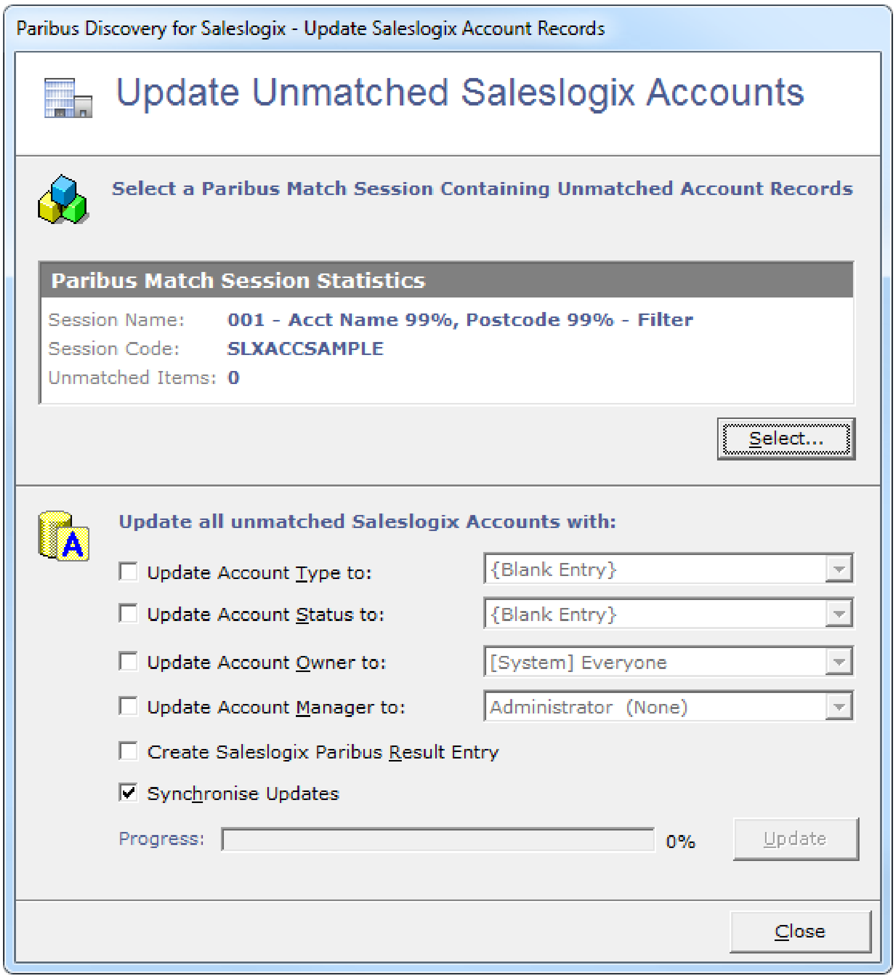


Figure 46 – Paribus Discovery for Saleslogix – Update Saleslogix Accounts

Paribus Match Session

Firstly, select the Paribus Match Session containing your Unmatched Account records, by clicking the **Select…** button.

This action will display the Paribus Match Session Selection dialog, containing Single Data Source Sessions only.

Update all unmatched Saleslogix Accounts

Unmatched Saleslogix Accounts can be updated as follows:

Account Type

To update the Account Type value, check the checkbox and select the Account Type value from the drop-down list. The list of available values is from your Saleslogix pick-list definitions.

Selecting the "{Blank Entry}" item in the drop-down list, will blank the Account Type value during the update.

Account Status

To update the Account Status value, check the checkbox and select the Account Status value from the drop-down list. The list of available values is from your Saleslogix pick-list definitions.

Selecting the "{Blank Entry}" item in the drop-down list, will blank the Account Status value during the update.

Saleslogix Paribus Result Entry

Each unmatched Account record can be recorded in the Paribus Results (Audit) table if required – see page 79. To achieve this, check the checkbox.

Synchronise Updates

The option to synchronise updates, ensures all Account updates will be synchronised to remote databases.

Auditing Your Duplicate Saleslogix Results

This section outlines the various options available to audit the Accounts and Contacts that have been affected by a Paribus Matching and duplicate removal process.

Each Saleslogix Account or Contact identified by Paribus as a duplicate (potential or otherwise) is tagged with a Paribus Audit result. Audit results are contained within an additional Saleslogix database table, which was installed as part of the Paribus Discovery for Saleslogix bundle (applied during the set-up).

Audit tagging of Saleslogix Accounts and Contacts is performed as an inherent part of the duplicate processing, performed by the Paribus Discovery for Saleslogix Component Plug-in. Tagging is not performed during the matching process itself.

The key purpose of the audit tagging is to provide an audit of which Accounts and Contacts have been involved in which Paribus duplicate processes, and what roles did each Accounts or Contact play in that process. The Paribus Audit Results provide an effective means of querying your Saleslogix database, based upon Paribus duplicate cleansing activity.

Identifying Duplicate Contacts from an Account De-Duplication Process

The Paribus Audit Results are used to tag potential duplicate Contacts, when performing an Account duplicate process and reassignment of Account Contacts. When a Contact is moved from a duplicate Account to a master Account, a duplicate check is performed on the moving Contact to ensure it is not in duplicate to any existing Contacts.

If so, a Paribus Audit Result is recorded against each potential duplicate Contact, detailing the nature of the reassignment and duplicate conflict.

Using a pre-defined Saleslogix Account Group (supplied in the Paribus Discovery for Saleslogix bundle) enables you to list any Accounts containing potential duplicate Contacts.

This Saleslogix Account Group is called: **Paribus Dupe Contacts**

If this group does not appear in your Saleslogix Sales Client application, contact your Saleslogix systems administrator.

Querying Paribus Audit Results

The Paribus Audit Results are stored within your Saleslogix database, and thus may be queried upon using the standard Saleslogix Query Builder. The following table should be listed in your Saleslogix Query Builder.

Paribus – Audit Results

Paribus Audit Data for Queries

The following table outlines the audit data available for querying the Paribus Audit Results.

Column	Values	Description
Session Name		Contains the name of the Paribus Match Session used for this matching/cleansing process.
Session Code		Contains the short Session Code of the Paribus Match Session used for this matching/cleansing process.
Entity ID		Contains the AccountID or ContactID of the related Saleslogix Account or Contact record.
Related Entity ID		Contains the ID of the related Account or Contact identified during the match process. e.g. Master Account relating to a duplicate Account.
Related Entity Name		Contains the Name of the related Account or Contact identified during the match process. e.g. Master Account relating to a duplicate Account.
Data Set	A or B	Denotes the Data Set the Account or Contact was listed in during the match process.
Member Role	Master Duplicate	Denotes the role this Account or Contact played during the duplicate cleansing process.
Match Score	60 to 100%	Contains the Match Score this Account or Contact obtained during the match process.
Member Tag		Contains any tag information that was attributed to the Account or Contact during the match review process.
Result Code	Master Duplicate Potential Duplicate	Contains the result code of the matching process. What this Account or Contact was in the matching/cleansing process.
Result Description		Contains a description of the action/process that took place regarding this Account or Contact.
SecCodeID		Contains the Saleslogix security Code (SECCODEID) value this Account or Contact had before it was hidden.
Status		Contains the status of the Account of Contact processed by the Paribus match cleansing process. **Duplicate** Denotes the Account/Contact is identified as a duplicate of another, but has not yet been merged. **Duplicate Merged** Denotes the Account/Contact is identified as a duplicate and has been merged with master **Duplicate Merged/Hidden** Denotes the Account/Contact is identified as a duplicate as has been merged with master and hidden from view.

Viewing Paribus Audit Results

The Paribus Audit Results can be viewed for any given Account or Contact, using the **Paribus Audit Results** data-view tab (supplied in the Paribus Discovery for Saleslogix bundle).

If this tab does not appear in your Saleslogix Sales Client application, contact your Saleslogix systems administrator.

Go to Related Account/Contact

When viewing the Paribus Audit Results of an Account or Contact, you may switch round to the related Account or Contact by right-mouse clicking the audit item and selecting **Go to Related Account/Contact…** option. This action will switch the current Account/Contact to the related one.

Double-clicking the item will also perform this action.

Using the Paribus Discovery for Saleslogix Data Repository

If you have opted to record any unmerged 1-to-1 data into the Paribus Discovery for Saleslogix Data Repository, then here is how you can access that information.

The Paribus Discovery for Saleslogix Data Repository can be viewed for any given Account or Contact, using the **Paribus Merge Data** data-view tab (supplied in the Paribus Discovery for Saleslogix bundle).

If this tab does not appear in your Saleslogix Sales Client application, contact your Saleslogix systems administrator.

Paribus Data Repository in the Saleslogix LAN Client

Note: This feature is only available for Saleslogix Version 6 or above.

On selecting an item in the Paribus Merge Data grid, and clicking **Edit…** from the right-click menu. This action will display the following dialog within Saleslogix.

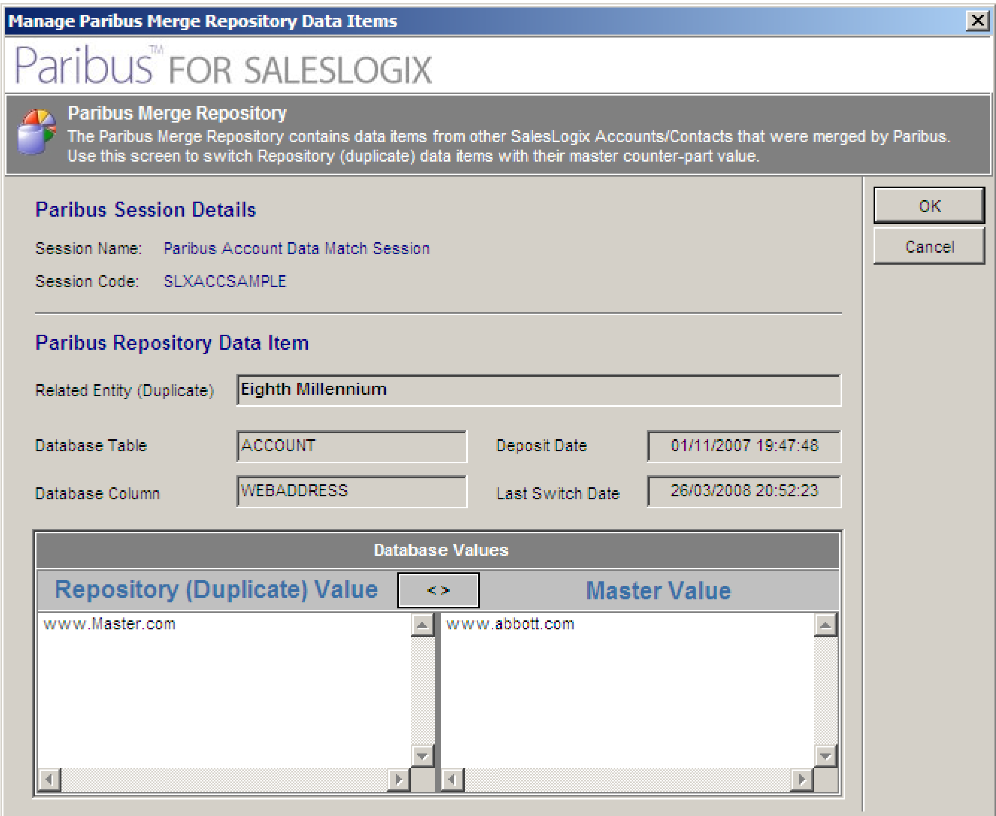


Figure 47 – Paribus Merge Data Information View

From this dialog is displayed the details of the Merge Data item including:

Item	Description
Database Table	The database table that originally contained the duplicate value.
Database Column	The database column that originally contained the duplicate

	value.
Database Value	The duplicate value, along side the existing master value.
Related Entity (Duplicate)	The name of the entity (Account or Contact) that the value originally related to.

Clicking the < > button provides the ability to switch the Duplicate Merge Data item in the repository with that of the master value.

Paribus Data Repository in the Saleslogix Web Client

Note: This feature is only available for Saleslogix Version 7.5.2 or above.

When viewing the Paribus Merge Repository tab in Saleslogix Web, you have the ability to switch the Duplicate Merge Data directly from the grid.

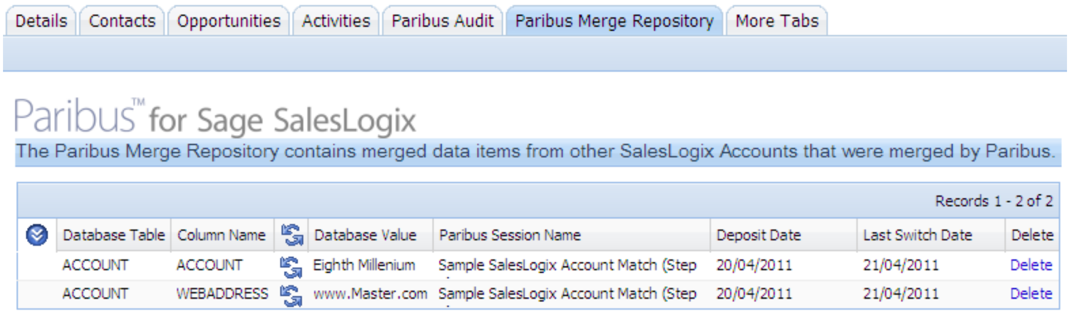


Figure 48 - Paribus Merge Data Information View

Clicking the icon provides the ability to switch the Duplicate Merge Data item in the repository with that of the master value.

Appendix A - Achieving Effective and Efficient Matching

A number of steps can be taken to achieve effective matching using Paribus. These should be treated as guides, and not as strict rules.

1. Use Multiple Match Process Passes for Best Results with Saleslogix

When matching data within a Saleslogix Database, it is important to consider matching the different entities (Accounts and Contacts) with multiple passes, due to complex relationships of the data (i.e. Accounts with multiple Contacts).

Each pass resulting in a consolidation of information to assist subsequent passes.

Pass One – Account Matching

Initially we recommend matching Saleslogix Accounts to establish and group potential duplicate Account records. Having identified them and processed them through the Paribus Discovery for Saleslogix Component Plug-in, each duplicate Account would then be consolidated into one (including Account Contacts).

When matching Saleslogix Accounts, the following match criteria is recommended (dependent upon the available data):

- **Paribus Match Set**: Based upon Account Name, using a Match Method of QMatch+.
- **Paribus Match Conditions**: Based upon (and/or) Postal code, Town/City, Telephone number, using QMatch+.

Pass Two – Contact Matching

Once an Account match has been established and the results processed by the Paribus Discovery for Saleslogix Component Plug-in, we recommend performing a Contact match.

As a result of the Account match process, all Contacts should now be consolidated into their respective Accounts. These Accounts are now likely to include potential duplicate Contacts as part of the consolidation process.

When matching Saleslogix Contacts, the following match criteria is recommend (based upon a prior Account consolidation):

- **Paribus Match Set**: Based upon Contact Name (Last, First and Title), using a Match Method of QMatch+.
- **Paribus Match Condition**: Based upon the Contacts AccountID, using exact value matching.

2. Use Match Conditions

Applying Match Conditions to a Match Session can increase the accuracy of match results considerably. Depending on the match threshold used against the Match Set, relying on the matches from the Match Set alone can yield some over-optimistic matches. Applying one or more Match Conditions can significantly reduce this problem.

Note: If too many Match Conditions are applied (especially if the Match Condition Operator for the Session is set to 'AND') the match process may yield very few or no results. Likewise, the underlying data supporting the Match Condition(s) should also be well populated to ensure additional matches occur successfully.

As a rule, the Match Set threshold should be set to about 80%, while match thresholds for Match Condition(s) should be a little higher at about 90% (dependent upon the data).

Typical Scenarios

- **Company Name Match -** if a Match Set is based on *Company Names*, applying Match Conditions based on *Postal Code*, *Town/City* and/or *Phone Number* may provide more accurate results.
- **Company Contact Match** - if a Match Set is based on *Company Contact Names*, applying a Match Condition based on the *Company ID* (assuming the Company data has been thoroughly de-duplicated first - see Point 1, above), will ensure only duplicate Contacts at the *same* Company are matched.
- **Private Contact Match (no Company relationship) -** if a Match Set is based on *Private Contact Names*, applying Match Conditions based on *Postal Code*, *Town/City* and/or *Phone Number* may provide more accurate results.

3. If no Match Conditions are used, increase Match Set Threshold

If no Match Conditions are available (or none are applied to the Match Session) increase the Match threshold of the Match Set to 90%+. This will effectively reduce the number of over-optimistic matches.

Use of ‘Extended Matching’

Extended Matching (under a Session’s Matching Process options) uses more rigorous matching rules and can often result in matches being found that would not otherwise occur. This, however, is at the expense of (significantly) increased processing time.

Use ‘Log Unmatched Records’ with care

‘Log Unmatched Records’ (under a Session’s Process Options) is a useful option that stores within a Session’s match results any records that did not match any other in the underlying data. However, storing the extra records incurs additional overhead that can be avoided if the unmatched records are not required to be logged.

Use Native OLEDB Drivers in Data Providers

When configuring the connection to the underlying data in a Data Provider, always use the native OLEDB Provider where possible. Native OLEDB providers are usually more efficient than their ODBC counterparts. Only use an ODBC connection if a native OLEDB provider is unavailable.

Select Data Set fields and joins with care

Including many information columns in a Data Set’s definition can be very beneficial when reviewing the match results. However, more information columns (and associated database table joins) can slow the matching process. Therefore, only include those columns that are useful and likely to be well-populated with data.

Index the underlying data tables

Look-ups on the underlying data will be quicker if the relevant columns in the database table(s) have appropriate indexes in place. Typically, the Primary Key, Foreign Key and any join columns defined in the Data Set should be indexed. Likewise, if any filters are being used, the look-up columns of those filters should also be indexed.

Set Paribus Match Dictionary rules carefully

Each Data Set has one or more associated Paribus Match Dictionaries (depending on the use of filters). A Match Dictionary contains intelligent references to the data being matched upon, and is used by Paribus to achieve intelligent matching using QGate's QMatch+ matching component.

A Match Dictionary is always built the first time a match process is run against a Data Set. The Match Dictionary can be retained for a number of days (set by the options on the Data Set Options tab) to prevent the overhead of rebuilding the Match Dictionary repeatedly with subsequent Session runs.

If the underlying data changes, however, it is important to force a rebuild of the Match Dictionary by using the 'Delete Dictionary' function under the Data Set Options tab. If the underlying data is constantly changing, it may be worth enabling the 'Generate Match Dictionary every time this Data Set is used' option.

Paribus Discovery – Troubleshooting

This section provides some assistance in identifying common issues and providing potential resolutions.

Unable to Connect to my Paribus Control Database

If you are unable to connect to your Paribus Control Database, this may be due to one of the following:

- The SQL Server service on which the Control Database is located is not running. Start the SQL Server service.
- The Control Database does not exist on the selected SQL Server. Create a Control Database on the designated server, or connect to the server that is hosting the required database (a Paribus Server Licence will be required for this server)
- Maximum number of Paribus Control Database connections exceeded. Each Paribus Server Licence defines the maximum number of connections that can be made by any Paribus installation to a given SQL Server instance. Once this has been reached, no further connection can be made by Paribus to the given server. Either install a new Paribus Server Licence with an increased number of connections or disconnect from the SQL Server from one or more Paribus installations.
- Paribus requires Microsoft Data Access Components 2.6 to run correctly. Make sure this is installed on the client machine.

I don’t get any Matches when I run my Match Session

If you obtain no match results on running a Match Session, one or more of the following may be the cause:

- Your Session match criteria are too stringent. Try setting the Match Threshold of the Session to a lower threshold value or disabling one or more Match Conditions in the Session.
- The information contained within the Match Dictionary is no longer valid, so nothing matches against it. A solution to this issue is to edit the Data Set used by the Match Set, and delete the Match Dictionary (Options tab).
- Of course, this may be due to there being no matches or duplicates in the underlying data. If filters have been applied, are the criteria to narrow?

Paribus Discovery – Technical Support and Troubleshooting

In the interest of providing customers with the latest product support information and troubleshooting assistance, QGate provides the following online resources within our QGate KnowledgeBase website:

General Support

For general technical support information, please visit the main product support page:

www.QGate.co.uk/knowledge/paribus-discovery

Troubleshooting

For troubleshooting common problems and scenarios relating to Paribus Discovery and Paribus Discovery for Saleslogix, please visit the following troubleshooting pages:

http://www.QGate.co.uk/knowledge/paribus-discovery/troubleshooting

http://www.QGate.co.uk/knowledge/paribus-discovery/troubleshooting-saleslogix/

System Requirements

For information regarding the minimum system requirements for installing and running Paribus Discovery, please visit the product system requirements page:

http://www.QGate.co.uk/knowledge/paribus-discovery/sysreqs

Product Information

For more information about Paribus Discovery or other products from QGate Software, see one of the QGate web sites:

EMEA: www.QGate.co.uk

Americas: www.QGateSoftware.com

Fault Reporting

If you wish to report a fault or an issue with Paribus Discovery, please contact your Paribus Discovery software supplier.

Upgrades and Service Releases

Revision upgrades and service releases of Paribus Discovery are available on request from your Paribus Discovery software supplier.

Warning: We strongly recommend you review the release information provided with each release, to ensure each upgrade is suitable to apply. If you are in any doubt, we recommend you contact your Paribus Discovery software supplier.

All major version release upgrades will require the purchase of a new licence.