



# *Paribus Interactive*<sup>™</sup>

for Microsoft Dynamics CRM

**Version 2.0**

## **Paribus Interactive for Microsoft Dynamics 365/CRM User Guide**

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## Notices

### Copyright Information

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### Disclaimer

Although every effort has been made to ensure the processing performed by this software product will not damage or corrupt your data, we strongly recommend you perform the following actions to safeguard against such eventualities.

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 database(s) to which Paribus Interactive connects to obtain match data.

**Note:** Paribus Interactive does not alter any data in databases as part of the matching and review process. Changes are only made by subsequent updates via Paribus Interactive 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 Microsoft CRM databases should be fully synchronised with the main host database before any updates are performed.

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## Overview

This document is a guide to using the Paribus Interactive for Microsoft Dynamics 365/CRM, a 365/CRM enhancement to avoid data duplication at the point of data entry.

This guide outlines the following:

- About Paribus Interactive for Microsoft 365/CRM
- Creating Accounts, Contacts and Leads using Paribus Interactive
- Duplicate match restrictions
- Paribus Interactive mapped fields for duplicate detection

## System Requirements

For up to date information on system requirements for Paribus Interactive and integration with Microsoft Dynamics CRM, see the online information available at the Paribus Cloud Help Center:

<https://www.paribuscloud.com/help/paribus-interactive/sysreqs/>

## Other Related Information

For information on using Paribus Interactive see the Paribus Interactive User Guide or visit the Paribus Help Center.

For additional reference information on Paribus Interactive, see the Paribus Help Center at <https://www.paribuscloud.com/help/paribus-interactive/>

For up to date information on Paribus Interactive and the Paribus Cloud, please visit the Paribus Cloud website at [www.ParibusCloud.com](http://www.ParibusCloud.com).

## Paribus Interactive User Guide

Due to recent changes in the implementation of Paribus Interactive for Microsoft Dynamics 365/CRM the content of this document has been temporarily removed and is under review.

For direct assistance in using Paribus Interactive with your instance of Microsoft Dynamics 365/CRM please contact the Paribus Cloud support team:

<https://www.paribuscloud.com/contact.html>

## Paribus – 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 Paribus Help Center.

### **General Support**

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

<https://www.paribuscloud.com/help/paribus-interactive/>

### **Troubleshooting**

For troubleshooting common problems and scenarios relating to Paribus Interactive and Paribus Interactive for Microsoft Dynamics CRM, please visit the following troubleshooting pages:

<https://www.paribuscloud.com/help/paribus-interactive/troubleshooting/>

### **System Requirements**

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

<https://www.paribuscloud.com/help/paribus-interactive/sysreqs/>

### **Product Information**

For more information about Paribus Interactive

Paribus Cloud      <https://www.paribuscloud.com/>

Or, for other products from QGate Software, see one of the QGate websites:

EMEA:                [www.QGate.co.uk](http://www.QGate.co.uk)

Americas:           [www.QGateSoftware.com](http://www.QGateSoftware.com)

## Fault Reporting

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

## Upgrades and Service Releases

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

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



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