



# *Paribus Interactive*<sup>™</sup>

for Microsoft Dynamics CRM

## Product Tour

(pre-release, subject to change)



Details		Address	
Account Name *	<input type="text"/>	Street 1	--
Main Phone	--	Street 2	--
Primary Contact	--	City	--
Annual Revenue	--	ZIP/Postal Code	--
No. of Employees	--		
Description	--		

## Microsoft Dynamics CRM Quick Create Support Features

- ❖ Seamless presence within the Microsoft Dynamics CRM Quick Create forms
- ❖ Underlining of CRM fields relative to the Paribus duplicate detection/search operations
- ❖ “As you type” interaction/response

(Pre-release, subject to change)



The screenshot shows the Microsoft Dynamics CRM 'New Account' form. The browser address bar displays 'https://crm.dynamics.com/main.aspx#' and the user is logged in as 'James Bond' from 'QGate Software'. A red-bordered alert box at the top right of the form states '3 possible duplicate companies'. The form is divided into two main sections: 'Details' and 'Address'. The 'Details' section includes fields for 'Account Name \*', 'Main Phone', 'Primary Contact', 'Annual Revenue', 'No. of Employees', and 'Description'. The 'Address' section includes fields for 'Street 1', 'Street 2', 'City', and 'ZIP/Postal Code'. At the bottom right of the form are 'Save' and 'Cancel' buttons.

Details		Address	
Account Name *	1st Networks	Street 1	--
Main Phone	--	Street 2	--
Primary Contact	--	City	--
Annual Revenue	--	ZIP/Postal Code	--
No. of Employees	--		
Description	--		

## Microsoft Dynamics CRM Quick Create Support Features

- ❖ Automatically perform Paribus Interactive searches for potential duplicates CRM entities
- ❖ Uses search criteria from the new data entry content (Quick Create)
- ❖ Provide interactive alerts to highlight potential duplicates

(Pre-release, subject to change)



The screenshot shows the Microsoft Dynamics CRM interface. The browser address bar displays <https://crm.dynamics.com/main.aspx#>. The user is logged in as James Bond, QGate Software. The main navigation bar includes "Microsoft Dynamics CRM", "Paribus Interactive™", and "General Search". The current view is "Account", and a notification indicates "3 possible duplicate companies". Below this, a section titled "Paribus Interactive™ (Possible Duplicates)" displays three account cards:

Account:	Review	Go To
<b>First Networks</b> St Columbus Dr Chicago 60605 99%		
<b>1st Communications &amp; Networks</b> 110 Peachtree Drive Miami 33161 96%		
<b>1st Network Communications</b> Saint Columbus Drive Chicago IL 60605 93%		

## Microsoft Dynamics CRM Quick Create Support Features

- ❖ View the potential duplicates identified by Paribus Interactive
- ❖ See the variation of search results
- ❖ Provide the ability to navigate to or review a potential duplicate

(Pre-release, subject to change)



The screenshot shows the Microsoft Dynamics CRM interface. The browser address bar displays <https://crm.dynamics.com/main.aspx#>. The CRM navigation bar includes the Paribus Interactive logo and a search bar. The user profile for James Bond, QGate Software, is visible. The main content area is titled "Contact" and displays a form with three columns: "Details", "Contact Information", and "Address".

Details	Contact Information	Address
First Name <sup>+</sup> Bob	Email --	Street 1 --
Last Name <sup>*</sup> --	Mobile Phone --	Street 2 --
Job Title --	Business Phone --	Address 1: City --
Account Name --	Description --	ZIP/Postal Code --

At the top right of the form area, it indicates "43 possible duplicate people" with a Paribus Interactive logo. At the bottom right, there are "Save" and "Cancel" buttons.

## Microsoft Dynamics CRM Quick Create Support Features

- ❖ Duplicate data detection based upon your data input
- ❖ “As you type” interaction/response

(Pre-release, subject to change)



The screenshot shows the Microsoft Dynamics CRM interface. The browser address bar displays <https://crm.dynamics.com/main.aspx#>. The user is logged in as James Bond, QGate Software. The page title is "Contact" and it indicates "4 possible duplicate people". The form contains the following data:

Details	Contact Information	Address
<u>First Name</u> +	Email	<u>Street 1</u>
<u>Last Name</u> *	Mobile Phone	Street 2
Job Title	Business Phone	<u>Address 1: City</u>
<u>Account Name</u>	Description	<u>ZIP/Postal Code</u>

At the bottom right of the form, there are "Save" and "Cancel" buttons.

## Microsoft Dynamics CRM Quick Create Support Features

❖ The more you type the more refined the Paribus Interactive Search

(Pre-release, subject to change)



Microsoft Dynamics CRM | Paribus Interactive™ | General Search | James Bond | QGate Software

Contact | 4 possible duplicate people

Paribus Interactive™ (Possible Duplicates)

Contact:	Contact:	Contact:	Lead:
<b>Robert Dixon</b> Managing Director <u>1st Communications and Networks</u> Saint Columbus Drive Chicago 60605 99%	<b>Bob Dickson</b> <u>First Networks</u> St Columbus Dr Chicago 60605 98%	<b>Rob Diksen</b> Professional Services Director <u>3 Blind Monks plc</u> 6 Crutched Friars London EC3N 2PH 98%	<b>Bob Dickson</b> Manager <u>Jupiter Astronomy Equipment</u> 737 Eastern Ave Grand Rapid, Michigan 49503 98%

## Microsoft Dynamics CRM Quick Create Support Features

- ❖ View the potential duplicates identified by Paribus Interactive
- ❖ See the variation of search results
- ❖ Paribus provides the ability to search across multiple CRM entities (e.g. CRM Contacts and CRM Leads)
- ❖ Provide the ability to navigate to or review a potential duplicate

(Pre-release, subject to change)



Microsoft Dynamics CRM | Paribus Interactive™ | General Search | James Bond | QGate Software

Account: New Account

https://crm.dynamics.com/main.aspx#

NEW | DEACTIVATE | CONNECT | ADD TO MARKETING LIST | ASSIGN | EMAIL A LINK | DELETE

CONTACT | **1 possible duplicate person** | **1 possible associated company**

**CONTACT**  
Robert Dixon

Owner\*  
James Bond

### Summary

#### CONTACT INFORMATION

Full Name*	Robert Dixon
Job Title	Managing Director
Account Name	1st Network Commu...
Email	bob.dixon@1stnetworks.co...
Business Phone	(555) 123-9999
Mobile Phone	(555) 565-9594

#### POSTS ACTIVITIES NOTES

Enter post here | POST

Both | Auto posts | User posts

**Robert Dixon**  
Contact: Created By James Bond.  
On Robert Dixon's wall  
Today

#### Company

1st Network Communications

#### RECENT CASES

Case Title	Case Number
No Case records found.	

## Microsoft Dynamics CRM Detail Form Support Features

- ❖ Seamless presence of Paribus Interactive within CRM detail forms
- ❖ Provide pro-active alerts of other potential duplicates entities
- ❖ Perform duplicate detection searches across multiple CRM entities
- ❖ Prevent CRM users from working with duplicate counterparts

(Pre-release, subject to change)





The screenshot shows the Microsoft Dynamics CRM interface. The browser address bar displays <https://crm.dynamics.com/main.aspx#>. The user is logged in as James Bond, QGate Software. The contact detail form for Robert Dickson is open, showing his name, title (Managing Director), and address (110 Peachtree Drive, Miami, 33161). A duplicate detection overlay is present, indicating "1 possible duplicate person" and "1 possible associated company". The duplicate person is Robert Dixon, with a 98% match score. The duplicate company is 1st Network Communications. The interface includes navigation buttons like NEW, DEACTIVATE, CONNECT, ADD TO MARKETING LIST, ASSIGN, EMAIL A LINK, and DELETE. The Paribus Interactive logo is visible in the top right corner of the overlay.

## Microsoft Dynamics CRM Detail Form Support Features

- ❖ View potential duplicate CRM entities directly within the main CRM detail forms
- ❖ Provide the ability to navigate to or review a potential duplicate
- ❖ Show the Paribus match score likeness to the current entity

(Pre-release, subject to change)



The screenshot displays the Microsoft Dynamics CRM search interface. At the top, the browser address bar shows the URL <https://crm.dynamics.com/main.aspx#> and the user account is identified as 'Account: New Account'. The CRM header includes the Microsoft Dynamics CRM logo, the Paribus Interactive™ logo, and the search type 'General Search'. The user's name 'James Bond' and company 'QGate Software' are also visible.

The main search area features the Paribus Interactive™ logo and the tagline 'Intelligent Searching for Microsoft Dynamics CRM'. A 'Search Profile' dropdown is set to 'General Search'. A 'Likeness' slider is positioned at 80%, with a range from 60% to 100%.

Search criteria are entered in the following fields:

- Person Name: Bob Dixon
- Account Name: Communication Networks
- Address: (empty)
- City: (empty)

A 'Search' button is located to the right of the input fields.

The search results are displayed in a blue header: 'Paribus Interactive™ Search Results (80% Likeness)'. Below this, a summary bar indicates '2 CRM Contacts | 1 CRM Lead | 2 CRM Accounts'. Two contact results are shown:

Contact	Review	Go To
<b>Robert Dickson</b> Managing Director <a href="#">1st Communications &amp; Networks</a> 110 Peachtree Drive Miami 33161 96%		
<b>Robert Dixon</b> Managing Director <a href="#">1st Communications and Networks</a> Saint Columbus Drive Chicago 60605 96%		

Total Results: 2

### Microsoft Dynamics CRM Search Support

- ❖ Intelligently search Microsoft Dynamics CRM
- ❖ Perform 'web like' searches within CRM
- ❖ Search across multiple CRM entities



## Phonetic Data Matching

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

## Synonyms, Abbreviations and Acronym Matching

- ❖ Robert, Bob, Bobbie, Rob, Robbie, Roberto
- ❖ William, Will, Willy, Bill, Billy
- ❖ Richard, Rich, Ric, Dick, Ricky
- ❖ International Business Machines, IBM, I.B.M

## Data Sequence Variation

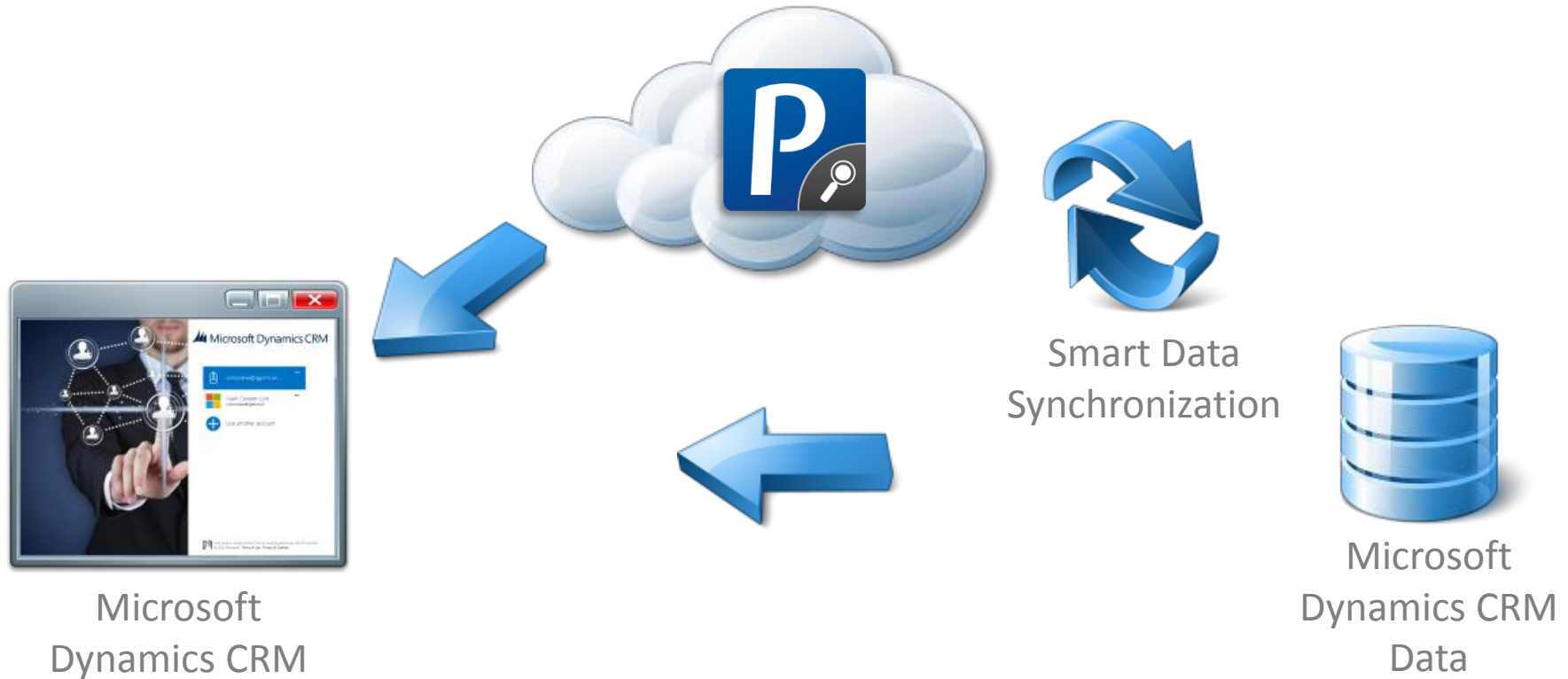
- ❖ Florida University, University of Florida
- ❖ Arizona 1<sup>st</sup> National Bank, First National Bank of Arizona
- ❖ 123 (Flat A) Acacia Avenue, Flat A – 123 Acacia Avenue

## Data Segmentation

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

## Gender Analysis

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



### The Paribus Cloud

- ❖ Intelligent data search engine as a service (SaaS)
- ❖ Hosted in the Microsoft Azure Cloud through secured SSL communications
- ❖ A private annual subscription service
- ❖ Dynamics CRM Data adoption into the Paribus Cloud from CRM Online or via IFD for CRM on premise
- ❖ Smart data synchronization

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### The Paribus Search Engine...

- ❖ Intelligent Data Search Engine
- ❖ Providing sophisticated search capabilities ('fuzzy' and phonetic searches)
- ❖ A unique 'Sequence Variation' search capability ('University of London' v 'London University')

### Microsoft Dynamics CRM Duplicate Detection...

- ❖ Automatically identify potential duplicates in CRM
- ❖ Identify potential duplicates across multiple CRM entities
- ❖ Provide proactive alerts to avoid duplicate data entry

### Microsoft Dynamics CRM Searching...

- ❖ Perform "web like" searches within CRM
- ❖ Find information within CRM both quickly and easily
- ❖ Search across multiple CRM entities in a single search

### Service Deployment...

- ❖ Cloud based SaaS service
- ❖ Subscription based
- ❖ Secure cloud hosted



# *Paribus Interactive*<sup>™</sup>