



Paribus™ for Microsoft Dynamics CRM

Version 1.4



**Microsoft
Dynamics CRM 2011**

Paribus™ for Microsoft Dynamics CRM eliminates waste, saves money and improves your company's health and image by enabling the identification and accurate consolidation of duplicate records within your CRM system.

Whether you need to de-duplicate, reassign or import data, consolidate or integrate systems; the intelligent matching of Paribus delivers the power you need to get the job done right. Clean data provides increased efficiency and effectiveness for all your sales, marketing and data synchronization requirements.

Quickly identify duplicate problems and cleanse your CRM system

Are you struggling with the inefficiencies of duplicated data?

Duplicated information increases cost and degrades your market's perception of your business. Your staff wastes valuable time retrieving records and systems have no effective means of exchanging important data. In addition to the hard costs associated with duplicate data, your business suffers from a degraded perception of your professionalism.

Whether it's Cold-calling existing clients . . . Customers receiving 2, 3 or 4 copies of the same mailing . . . Confusion when they reach your call center . . . These are just a few examples of the REAL cost of bad data in your CRM system.

Paribus provides benefit to businesses irrespective of market or size. The accurate consolidation of customer information into a single, non-duplicated set of information is essential. Increase sales and marketing effectiveness and productivity through clean, focused data; with a cohesive view of the customer.

De-duplication: Identify duplicate data within Dynamics CRM to ensure a clean and consolidated view of information.

Consolidation: Use Paribus to identify existing customers/prospects in purchased lists prior to importing or combining information from multiple sources into your Dynamics CRM system.

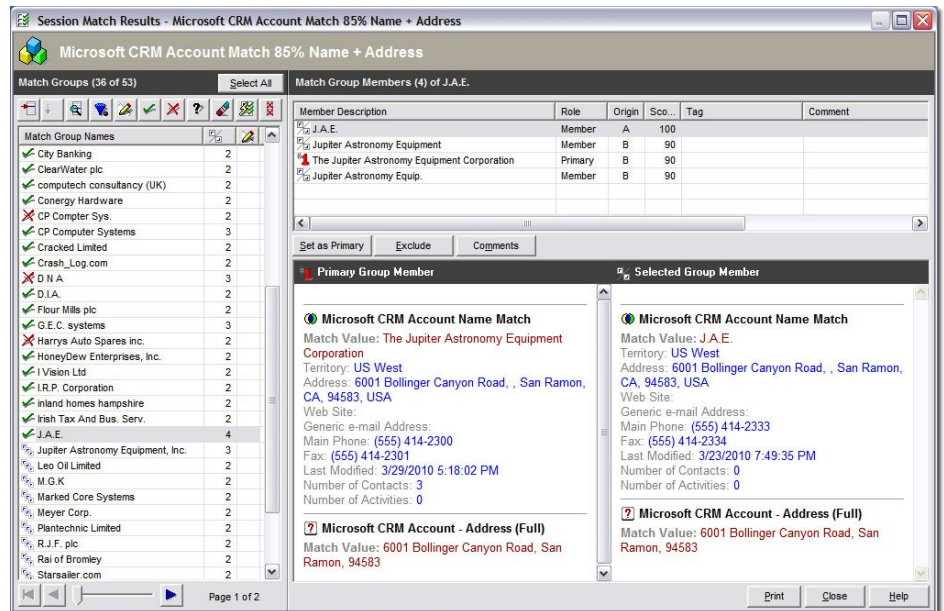
Systems Integration: Establish relationships between information from multiple systems (e.g., CRM and ERP) for the purpose of systems integration.

Benefits

- Improve user acceptance of CRM data
- Maximize customer and prospect perception through improved accuracy of contact messaging
- Decrease processing, mailing and shipping costs
- Easier compliance with regulatory requirements
- Improve cash flow
- Efficient and sophisticated matching for easy and comprehensive identification of duplicate records
- One solution for Account, Contact and Lead cleansing
- Custom configuration and cleansing plug-in specifically built for Microsoft Dynamics CRM
- Affordable cost

Key Features

- Direct data access—no need to export/import your data
- Uses an independent control database for review so you can review matches from your live data without making changes
- Uses fully definable rules for matches on multiple data fields
- Merge duplicate CRM entities into one complete master record with definable rules
- Gives business users the ability to manage matching processes without requiring programming skills
- Provides easy review and management of match results
- Process Scheduler
- Allows for the export of match information for use with other external data sources and ETL utilities, including Scribe and Inport
- Connects to Dynamics CRM data via the official CRM Web-Services



The Paribus Match Session review screen provides an easy method for determining which groups of matches to process and to identify the surviving "Master" record.

How Paribus Matches Data

QGate's sophisticated matching algorithms provide the ability to intelligently identify matches within data based on phonetic likenesses, synonyms and name variations; irrespective of word segmentation, noise words, spelling errors and even word sequencing.

Phonetic Matching

Paribus is able to match data based upon phonetic likeness:

- Foto Centre, Photo Center
- Charyl Wiatt, Sheryl Wyiatt, Sherril Wyatt

Synonyms and Abbreviations

Paribus provides support for matching synonyms and acronyms:

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

Sequence Variations

Paribus provides a unique feature of identifying matches regardless of the sequence and extent of the words and/or names contained:

- Florida University, University of Florida
- Arizona 1st National Bank, First National Bank of Arizona

Data Segmentation

Paribus includes the ability to match names regardless of their segmentation (spaced / punctuated words):

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



Microsoft Partner

Gold Customer Relationship Management
Gold Independent Software Vendor (ISV)

Content subject to change

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