

QGate Knowledge Sheet

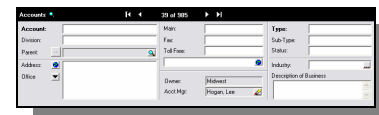


WARNING! – Saleslogix Merge Records feature damages SalesLogix integrity.

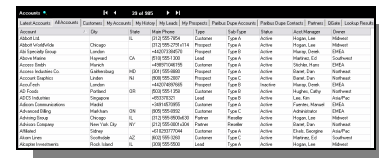
Review of Saleslogix merge record facility against the Paribus SLx Plug-in

Are you seeing any of the following symptoms?

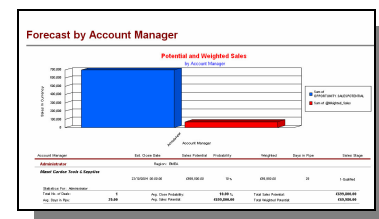
Apparently blank Saleslogix Records ?



Saleslogix groups not displaying records that do exist ?



Inaccurate / Inconsistent Reports ?



Blank / Duplicate Mailings ?



Remote and Host Databases not Synchronising Correctly ?



The above are some of the issues seen as a result of using the Saleslogix merge facility

ANY merge/purge process based on the inherent SalesLogix merge data function WILL damage the integrity of the system.

The chart below compares the features of *Paribus for Saleslogix* that maintain data integrity, compared to the standard Saleslogix merge function.

Paribus for Saleslogix	Saleslogix Merge
Control and review functions	
<p>✓ A Paribus user has full control to identify and update the status of any master / merge record at any time without having to suspend or re-run the duplicate checking process.</p>	<p>! Saleslogix Duplicate identification process has to be continually stopped and restarted in order to accurately identify duplicate master and merge records.</p>
<p>✓ Paribus provides a detailed on screen / printable report of possible matching Account/Contact records. (Also provides the facility to examine the record(s) in Saleslogix).</p>	<p>✗ Saleslogix Does Not</p>
Standard 1-many tables	
<p>✓ Paribus will merge ALL data grid records (1 to many tables).</p>	<p>! Saleslogix will merge standard data grid records (1 to many tables). i.e. History, Activity, Attachments etc.</p>
<p>✓ Paribus automatically reassigns ALL related information from duplicate records over to a nominated master record.</p>	<p>! Customised field information (1 to many) will not always be merged subject to its build design. Data will be lost.</p>
<p>✓ Updates merge record data to refer to the master record. i.e. the master record account name is updated to the merged records, thereby maintaining data consistency.</p>	<p>✗ <i>Saleslogix Does Not</i></p>
Custom 1-many tables and secondary custom joins	
<p>✓ Will interrogate the joins table to build its knowledge of the extensions to the standard structure. The user can also add additional join information within Paribus to handle other customer tables and secondary joins. ALL this information is then used to preserve the integrity of the data during a merge of records.</p>	<p>! Saleslogix will only merge the primary join of a custom table if listed in the joins table. Data will be lost for other custom tables and/or secondary joins.</p>
1-1 data management	
<p>✓ Paribus by default will enhance the master record with data from the duplicate record. i.e. where the master record has a blank field and the duplicate record has data, the master will be enhanced with the data from the duplicate. However Paribus has the ability to input custom merge rules to control at a field level this merge processing.</p>	<p>! Saleslogix will only merge single field, non custom data (1 to 1 relationships) where the information does not exist in the master record. Excess data is lost.</p>
<p>✓ Excess 1-1 data is stored in the Paribus Data Repository and can be seen in the account/contact record.</p>	<p>! <i>Saleslogix Does Not</i></p>
<p>✓ Any data from the merge record that has been stored in the Paribus Data Repository, can be restored to the master record at a later date.</p>	<p>✗ <i>Saleslogix Does Not</i></p>
Duplicate record management/processing	
<p>✓ Option to keep duplicate Account or Contact merged records whilst merging associated data. e.g. Contacts, Opportunities, Activities, History etc.</p>	<p>✗ <i>Saleslogix Does Not</i></p>
<p>✓ Option to Hide duplicate Account / Contact records from standard Saleslogix users after the merge.</p>	<p>✗ <i>Saleslogix Does Not</i></p>
<p>✓ Option to create Associations between duplicate records if duplicate data is retained.</p>	<p>✗ <i>Saleslogix Does Not</i></p>

Paribus for Saleslogix	Saleslogix Merge
<p>✓ Options to remove duplicate Accounts/Contacts that were previously retained.</p>	<p>✗ <i>Saleslogix Does Not</i></p>
<p>✓ Create a History Records for Reassigned Accounts/Contacts.</p> <p>✓ Automatically create a Saleslogix History record (Note) for each Account/Contact (both master and duplicate) that were involved in a merge.</p>	<p>✗ <i>Saleslogix Does Not</i></p>
<p>✓ Paribus provides Audit reports on the data merge process. Each Audit report contains a detailed audit history of all the changes that were applied to your Saleslogix database.</p>	<p>✗ <i>Saleslogix Does Not</i></p>
<p>✓ Automatically identifies possible duplicate Contacts when merging account records.</p>	<p>✗ <i>Saleslogix Does Not</i></p>
<p>Remote system management</p>	
<p>✓ Remote databases are managed within the Paribus for Saleslogix plug-in to ensure that all systems have received the merge data prior to deleting the duplicate records.</p>	<p>!</p> <p>Merging records will cause any pending synchronization data to be orphaned. This will lead to severe data integrity issues and “lost” data.</p>
<p>✓ Option to Synchronize Changes to Remote Databases.</p> <p>Provide control over if/when the changes get synchronised</p>	<p>✗ <i>Saleslogix Does Not</i></p>
<p>✓ Paribus provides monitoring of each remote system to show if the changes have been received by all remotes.</p> <p>Once remotes have received the changes, then the deletion of the duplicates can be actioned, thus maintaining full integrity.</p>	<p>✗ <i>Saleslogix Does Not</i></p>