



c360 Data Quality Center Administration and Configuration Guide

Microsoft Dynamics CRM 3.0 Compatible

c360 Solutions, Inc.
Products@c360.com
www.c360.com



Table of Contents

Table of Contents	2
Glossary	3
Overview	4
Accessing Address Validation	6
Configuring Address Validation Settings	7
OnSave	8
Show Preview	8
'Validate Address' icon	10
Accessing Duplicate Detection	11
Configuring Global Preferences	13
General Settings	14
Alternative Comparison Rules	16
Name-Based Rule	17
Character-Based Rule	20
Potential Duplicate Configuration Screen	21
Match Codes	23
Configure Match Codes	23
Individual Match Codes	24
Individual Match Code Examples	27
Organization Match Codes	27
Organization Match Code Examples	30
Schedule or Run Match Code Generation	31
View Potential Duplicates	34
Potential Duplicate Queue	34
Potential Duplicate Display	37
Troubleshooting	39
Appendix	40
A: Register/Activate Strikelron Account for Address Validation	40
A: Cost of Address Validation	43



Glossary

The table below provides definitions of commonly used terms in this guide.

Term(s)	Definition(s)
CRM User	An individual with a Microsoft CRM license that uses Microsoft CRM to track their customer-facing interactions.
CRM Administrator	The individual in an organization responsible for managing the Microsoft CRM installation. For the purposes of this guide we will assume that this person is also managing the Duplicate Detection installation.
PDQ	Potential Duplicate Queue - Shows CRM users and administrators a set of two or more CRM records that have been identified as potential duplicates by Duplicate Detection's scheduled process
PDD	Potential Duplicate Display – Screen that lists information about records that may potentially be duplicates. PDD is launched during record creation or updation time
ACR	Alternative Comparison Rule – Configure rules so that Duplicate checking is more intelligent and considers localisms like similarities in characters and names (e.g Bob/Robert, Richard/Dick, e/é)

Overview

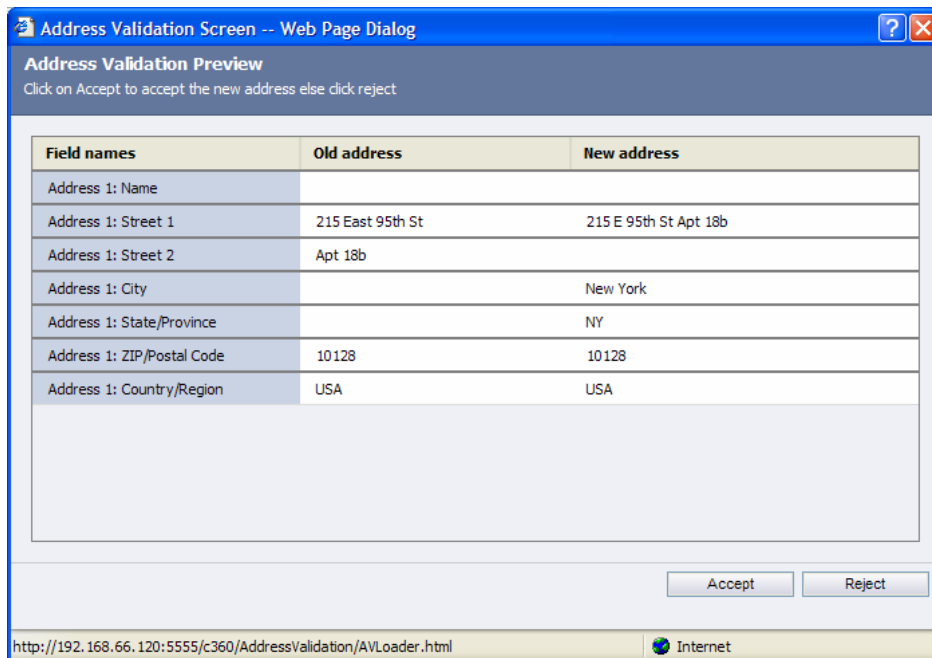
c360 Solutions Data Quality Center offers organizations a complete solution to validate, manage and keep their valuable customer data clean and up-to date. The Data Quality Center components validate your customer data in both batch and real-time modes by standardizing address information and identifying potential duplicate records.

The components of the c360 Data Quality Center are

1. Address Validation
2. Duplicate Detection

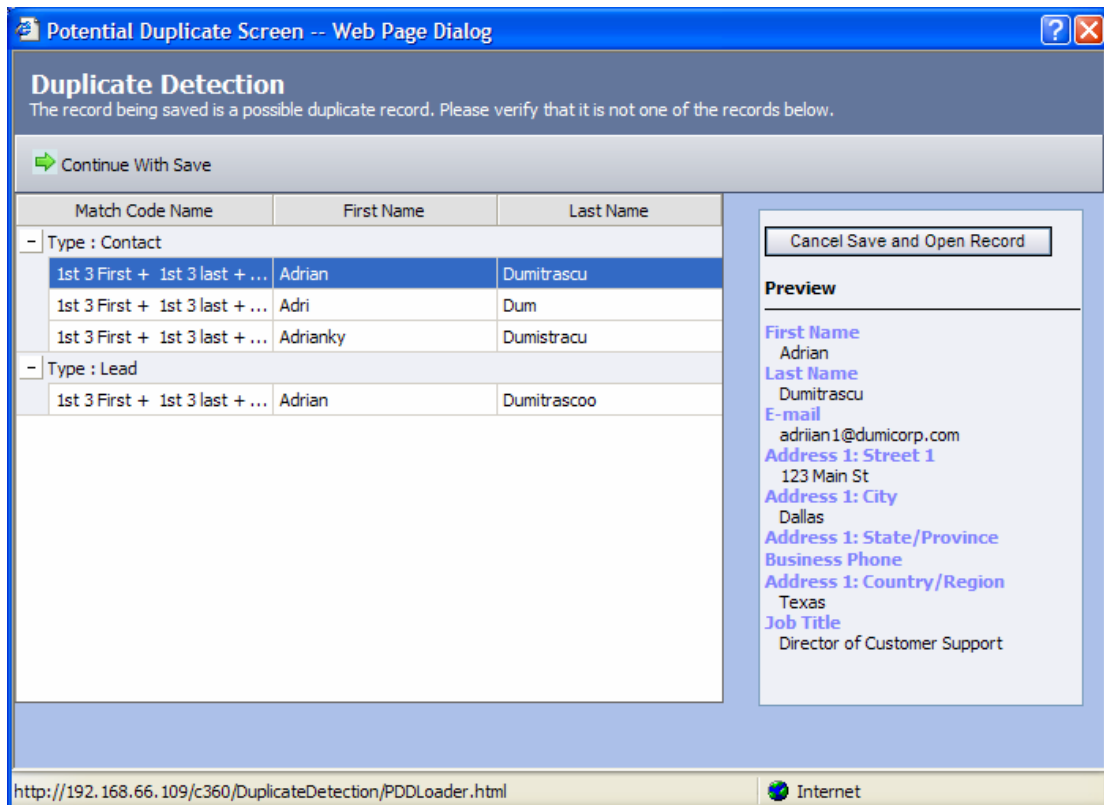
The **Address Validation** component allows Microsoft CRM users to verify and correct CRM addresses (Lead, Contact, Account, CustomerAddress) using US Postal Code standards. The Address Validation engine uses the United States Postal Service certified technology to verify, correct and enhance any address in the U.S. The service corrects street name misspellings, validates street type extensions, standardizes city name and state names, and appends missing state abbreviations. The features of Address Validation are:

- **Real-time verification** and standardization of US addresses
- Validate and correct addresses and add ZIP+4 data
- Standardize city names and state names
- **Preview Pane** (optional) where users can see the old and new address
- Automatic Auto-updating of the verified address during save of the record
- A new optional 'Validate Address' button is also available on the entity toolbar which allows users to trigger the address validation service on-demand



The **Duplicate Detection** component notifies Microsoft CRM users interactively when they are creating a Lead, Contact or Account record that appears to be a duplicate of an existing record. The features of Duplicate Detection are:

- Compares against Lead, Contact and Account records, using concept of 'individual' (i.e. Lead or Contact) and 'organizational' (i.e. Lead or Account) records to intelligently determine where duplicates exist
- Implements **match code technology** for rapid detection and display of potential duplicates as users are inserting and updating CRM records
- Allows administrators to define up to 5 match codes per record type (individual/organizational)
- Allows use of partial string, entire field and sound matching (Soundex) comparison options when configuring match codes
- Alternative Comparison rules can be enforced so names like **Bob** and **Robert** or letters like **e** and **é** can be compared. These rules are configurable for language and cultural subtleties
- Includes scheduled process for nightly detection of duplicates
- Includes a Potential Duplicates Queue where users can review potential duplicates that have been identified by the scheduled duplicate detection process



Potential Duplicate Screen -- Web Page Dialog

Duplicate Detection
The record being saved is a possible duplicate record. Please verify that it is not one of the records below.

Continue With Save

Match Code Name	First Name	Last Name
- Type : Contact		
1st 3 First + 1st 3 last + ...	Adrian	Dumitrascu
1st 3 First + 1st 3 last + ...	Adri	Dum
1st 3 First + 1st 3 last + ...	Adrianky	Dumistracu
- Type : Lead		
1st 3 First + 1st 3 last + ...	Adrian	Dumitrascuo

Cancel Save and Open Record

Preview

First Name
Adrian

Last Name
Dumitrascu

E-mail
adrian1@dumicorp.com

Address 1: Street 1
123 Main St

Address 1: City
Dallas

Address 1: State/Province
Business Phone

Address 1: Country/Region
Texas

Job Title
Director of Customer Support

http://192.168.66.109/c360/DuplicateDetection/PDDLoader.html Internet

Accessing Address Validation_____

The Address Validation component is a highly configurable solution. All configuration tools can be found under the c360 Settings tab which is installed with Data Quality Center. The Address Validation link, as shown in Figure 1a, can be accessed by going to the Settings area and clicking 'c360 Settings' and then 'Data Quality Center Settings' on the left navigation bar.

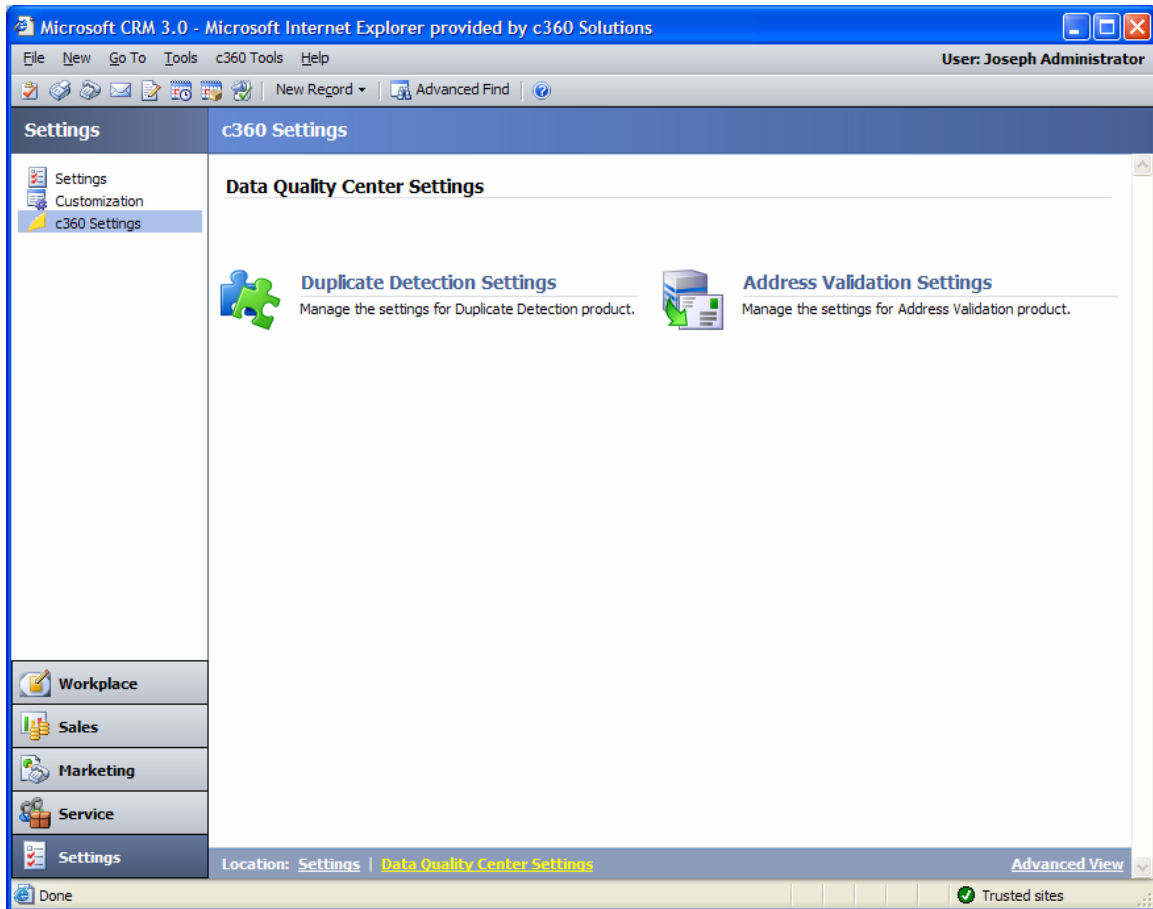


Figure 1a: Data Quality Center Settings area

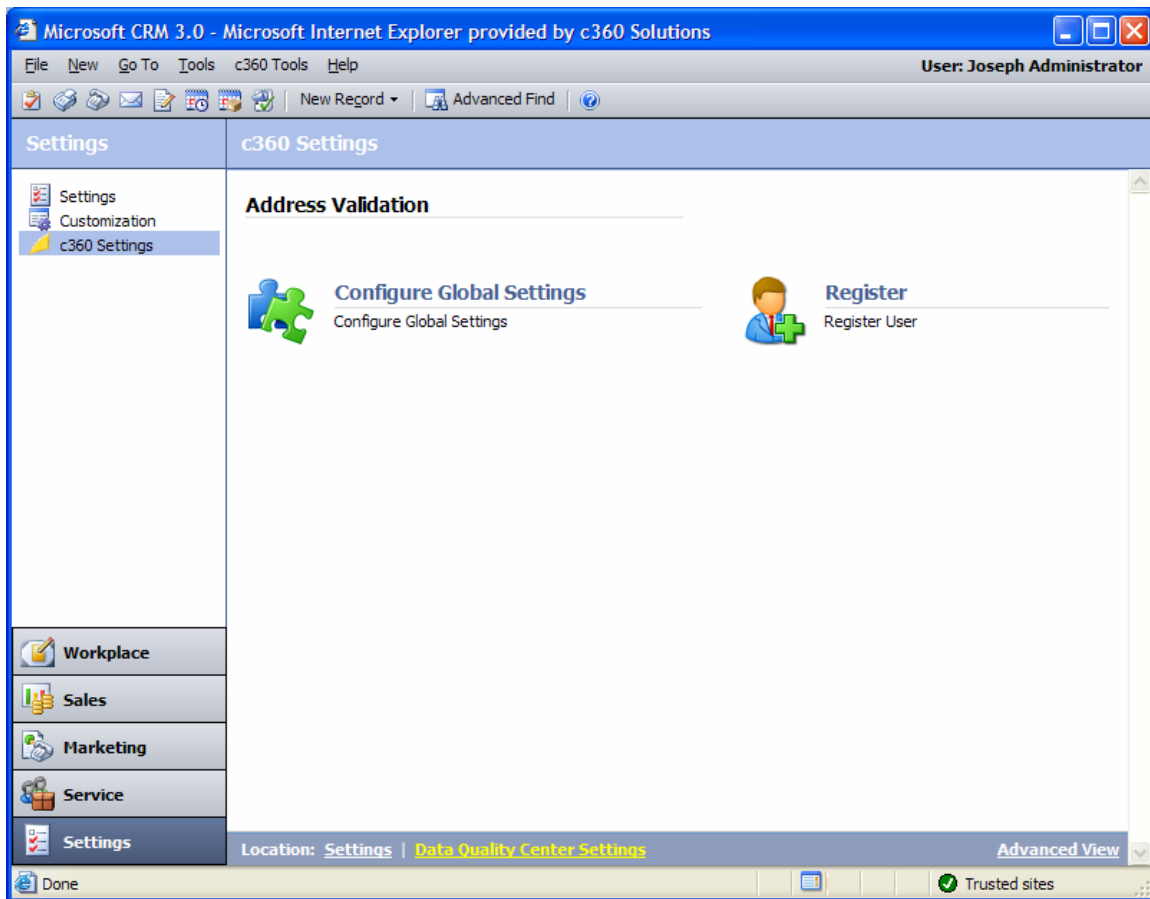


Figure 1b: Address Validation Settings

The configuration options (Figure 1b) for the Address Validation components are

- Configure Global Settings
- Register

Note: In order to utilize the Address Validation real-time verification service, the administrator needs to register and activate the Strikelron account. Details of this are shown in the appendix

Configuring Address Validation Settings

Address Validation works with the following 4 entities

- Lead
- Contact
- Account
- CustomerAddress

Figure 1c shows the configuration option for Address Validation

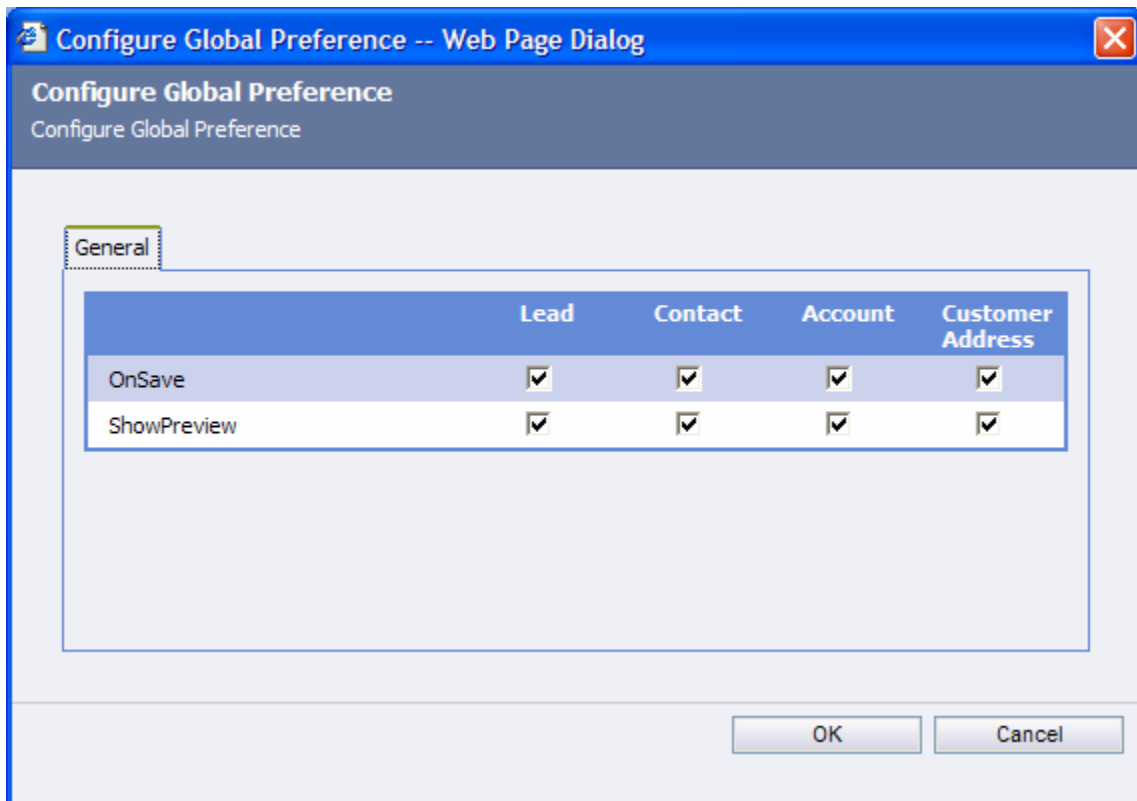


Figure 1c: Address Validation Configuration options

OnSave

Organizations can specify if Address Validation should be triggered automatically during the Save of the record by checking the 'OnSave' checkbox for the specified entity.

Note – Address Validation can also be triggered on-demand by clicking the 'Validate Address' icon on the entity forms

Show Preview

Organizations also have an option to show a preview pane shown which will display the 'old' and the 'new' address based on which the user can accept or reject during the save of the record. Figure 1d shows a sample preview pane.

Note – If 'ShowPreview' is unchecked then Address Validation will automatically update the old address with the validated address.

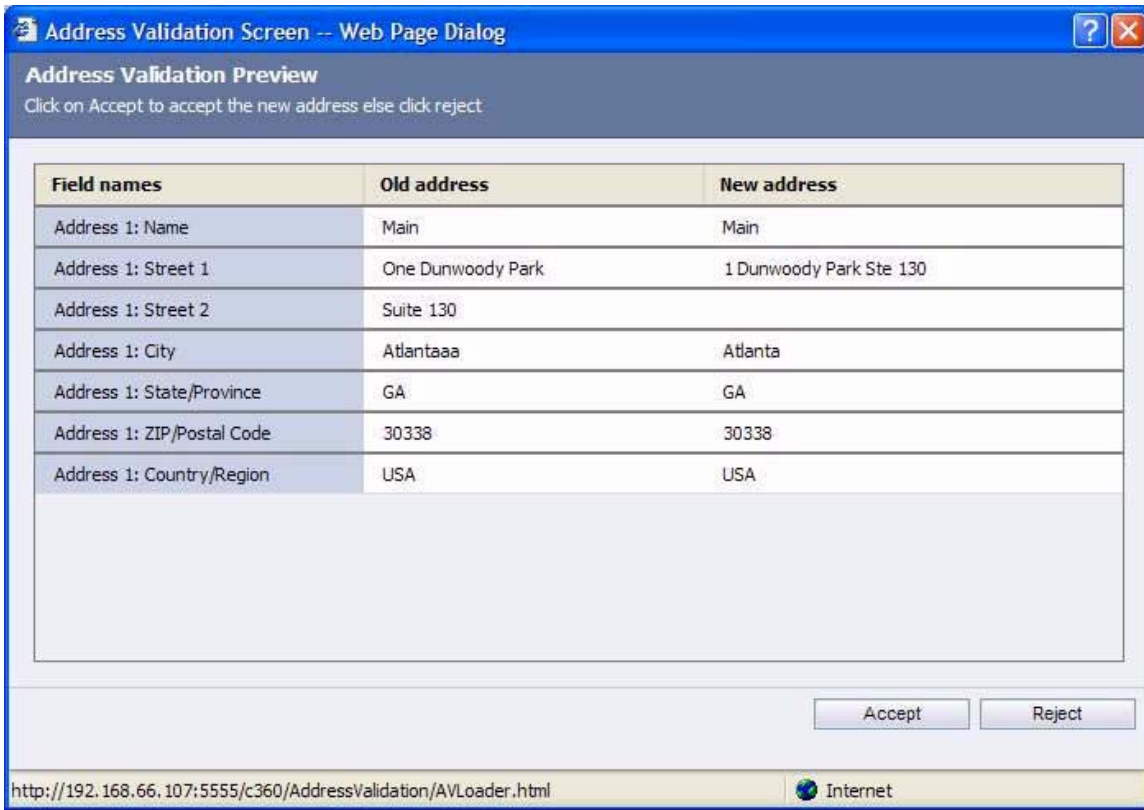


Figure 1d: Address Validation preview pane

'Validate Address' icon

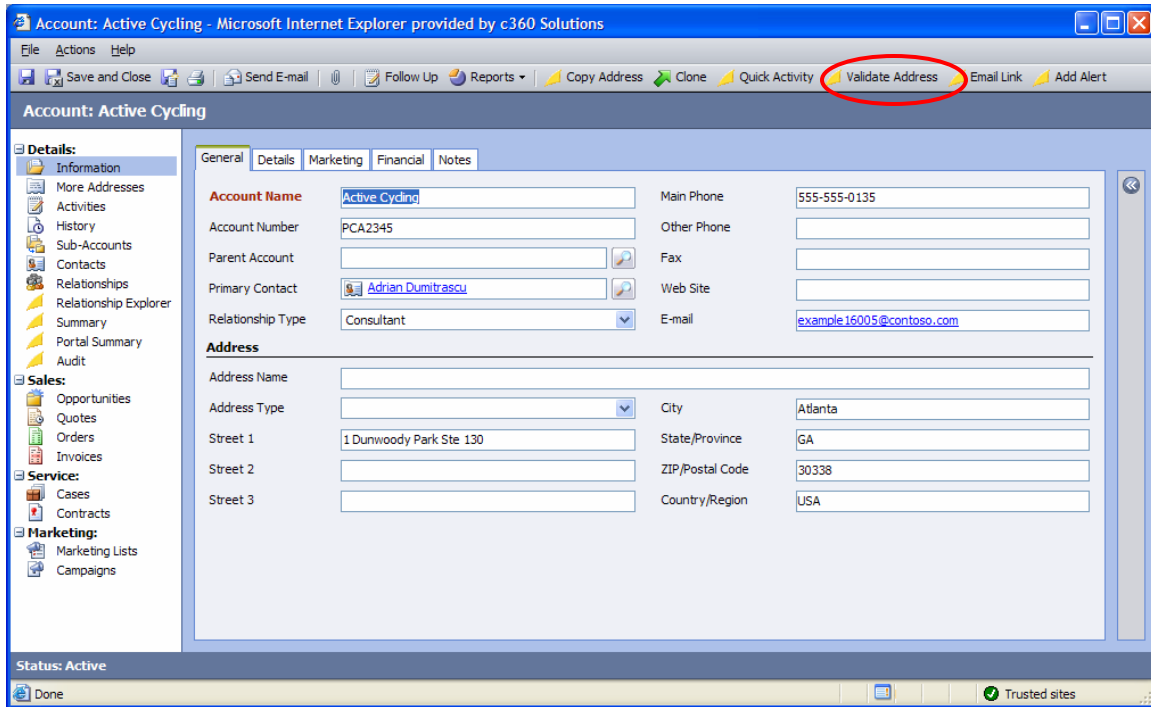


Figure 1e: 'Validate Address' icon

Users can trigger the Address Validation services on-demand by clicking the 'Validate Address' icon on the form toolbar. See Figure 1e for details.

Accessing Duplicate Detection _____

The Duplicate Detection component is a highly configurable solution. All configuration tools can be found under the c360 Settings tab which is installed with Duplicate Detection. The Duplicate Detection Settings link, as shown in Figure 2a, can be accessed by going to the Settings area and clicking 'c360 Settings' on the left navigation bar.

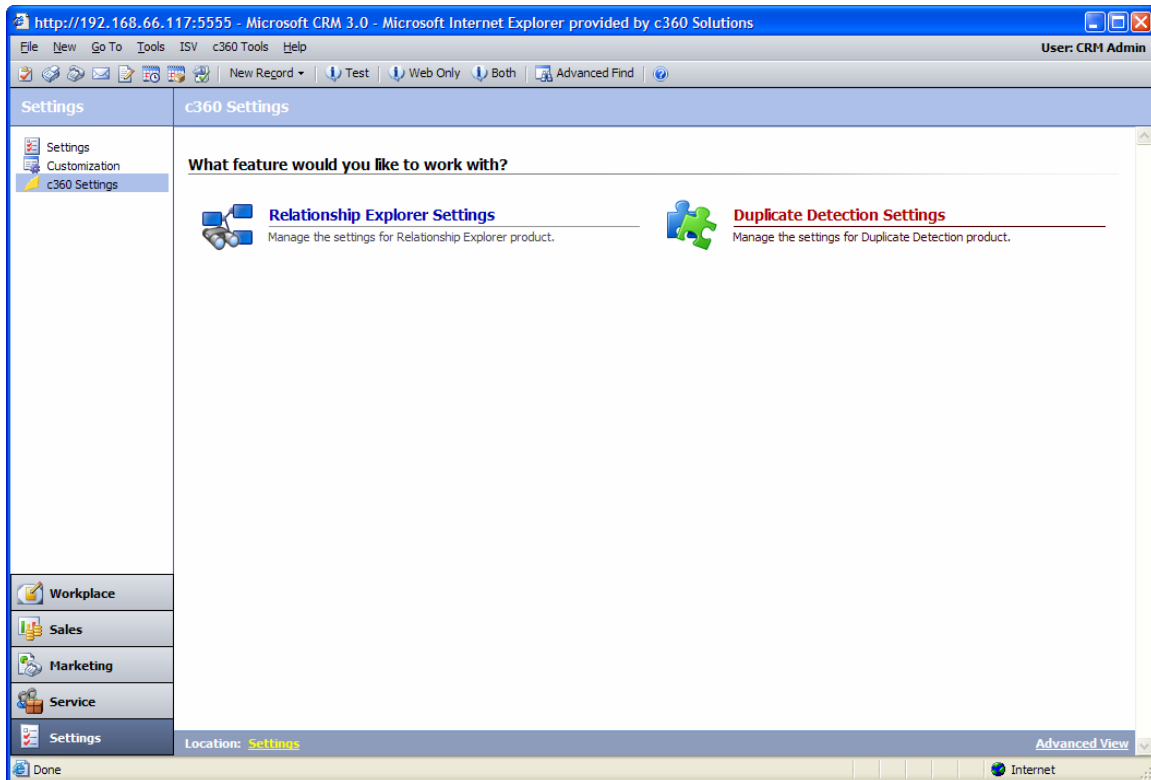


Figure 2a: c360 Settings area

Clicking on the Duplicate Detection Settings link will launch the Duplicate Detection Settings area as shown in Figure 2b.

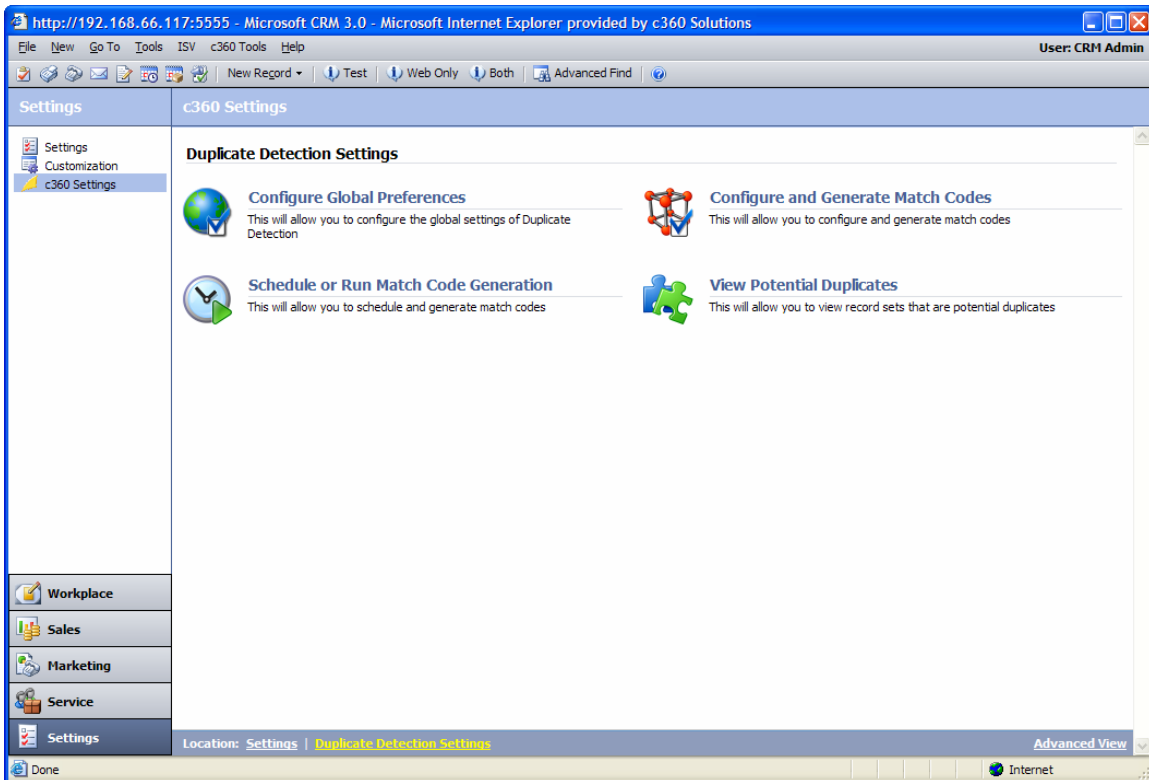


Figure 2b: Duplicate Detection Settings area

The Duplicate Detection Settings area contains four main configuration tools. These are listed and described in the table below:

Tool	Description
Configure Global Preferences	This area allows you to set global settings for the application. The features that can be configured in this area include: <ul style="list-style-type: none"> - General Settings - Configure Alternative Comparison Rule - Potential Duplicate Configuration Screen
Configure and Generate Match Codes	This area will allow you to configure and generate match codes
Schedule or Run Match Code Generation	This area lets you schedule or generate match codes
View Potential Duplicates	This area lets you view the PDQ which contains record sets of potential duplicates

Configuring Global Preferences _____

The Configure Global Preferences area, pictured in figure 3, outlines the various changes that can be made through the Global Settings area.

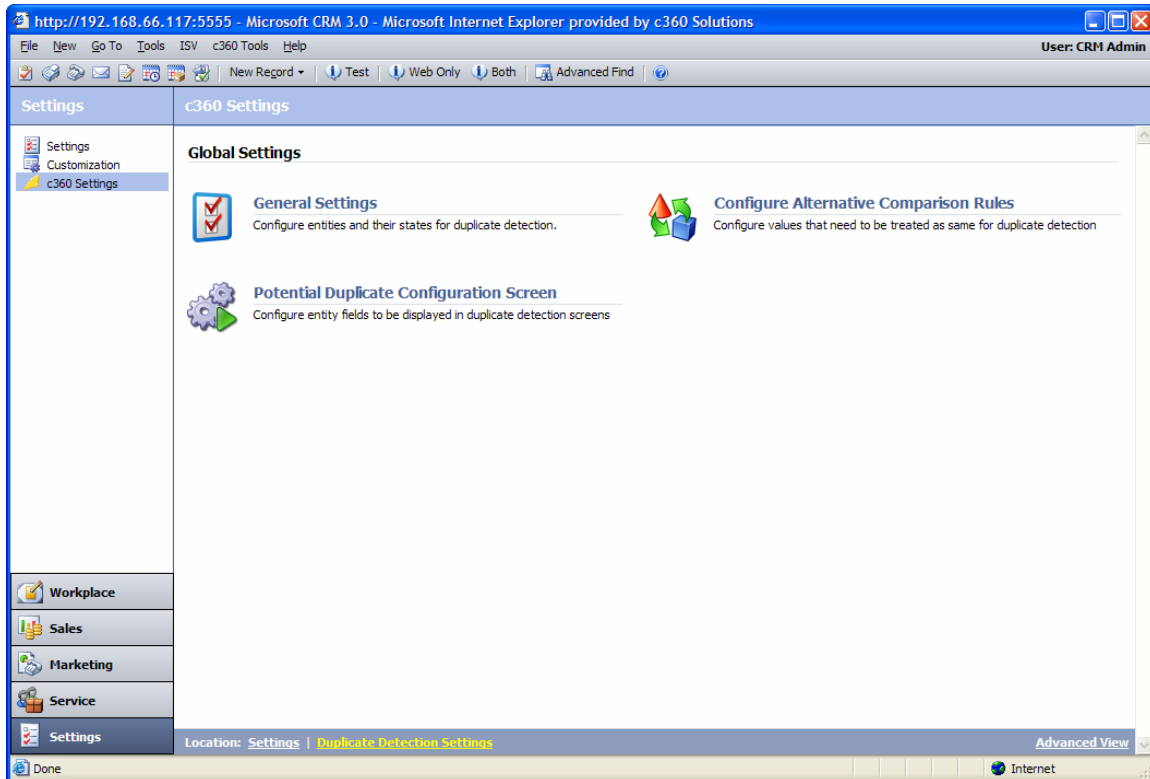


Figure 3: Global Settings

General Settings

The administrator can select the entities as well as the entity status for which to enable Duplicate Detection on the 'General' tab, as illustrated in Figure 4.

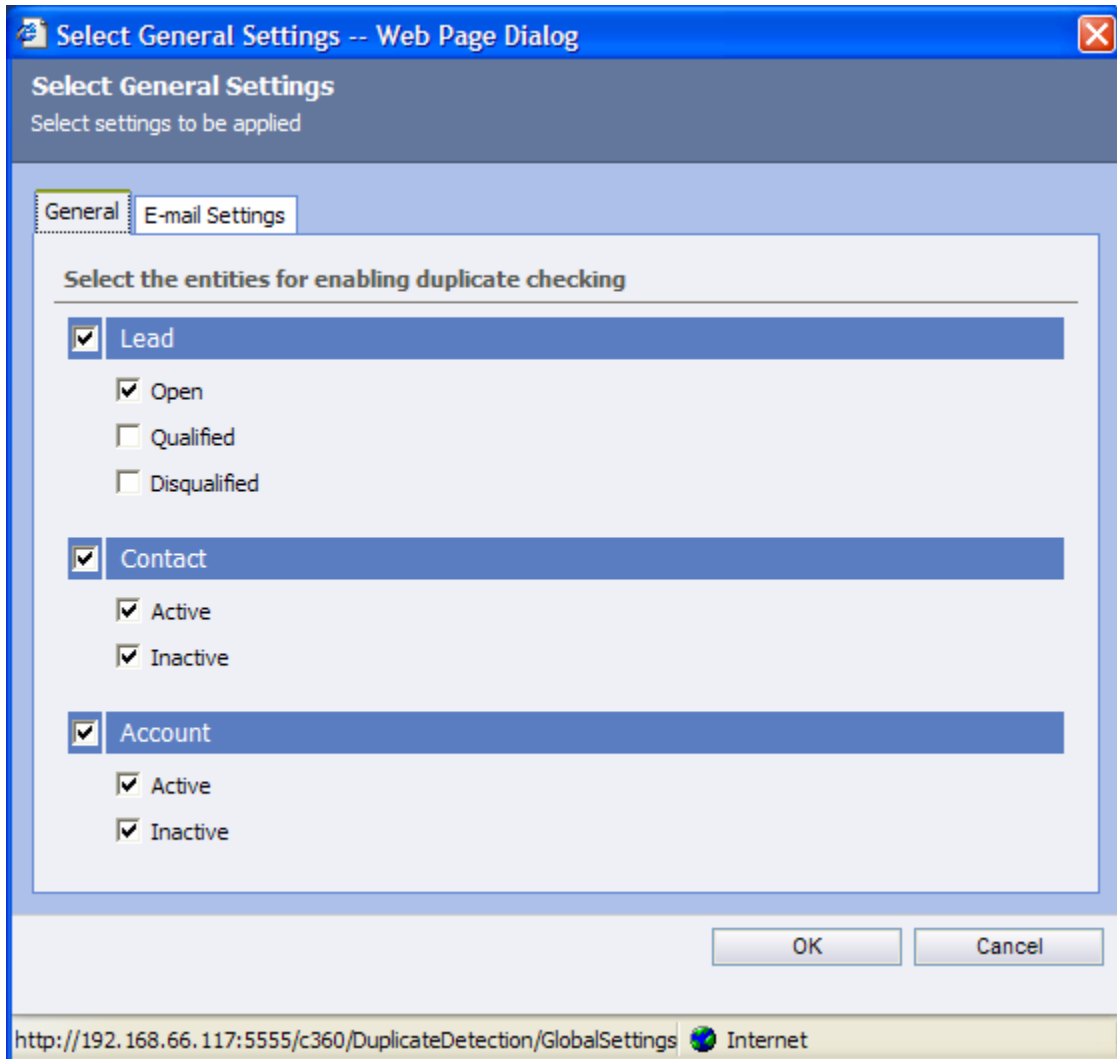
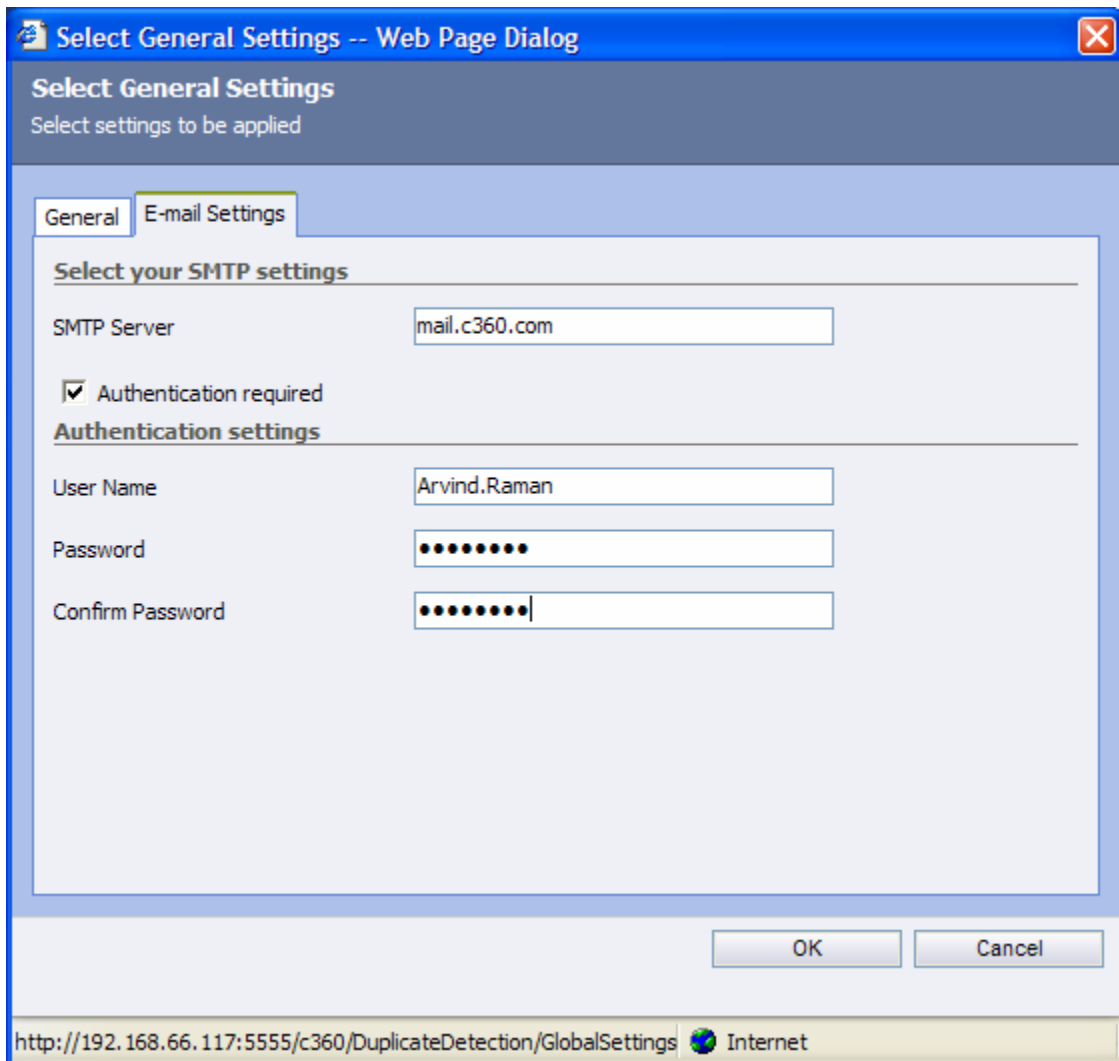


Figure 4: Duplicate Detection General Settings

The administrator can also specify the smtp server to be used for sending emails on 'Email Settings' tab. (See Figure 5)



Select General Settings -- Web Page Dialog

Select General Settings
Select settings to be applied

General | **E-mail Settings**

Select your SMTP settings

SMTP Server: mail.c360.com

Authentication required

Authentication settings

User Name: Arvind.Raman

Password: ●●●●●●

Confirm Password: ●●●●●●

OK Cancel

http://192.168.66.117:5555/c360/DuplicateDetection/GlobalSettings Internet

Figure 5: Duplicate Detection E-mail Settings

Alternative Comparison Rules

Alternative Comparison Rules are rules that the administrator can setup so that the Duplicate Detection system is more intelligent and considers localisms like similarities in characters and names (Robert/Bob Richard/Dick, e/é).

- An ACR (Alternative Comparison Rule) that has been setup to treat Robert and Bob as the same will ensure that whenever a new contact is entered/updated with firstname as 'Bob', it will also check for 'Robert' and thus display duplicates which match both the criteria
- ACR can be setup on individual Lead, Contact and Account fields so you can setup different comparison rules for different fields. So you can have a rule to compare against standardized name values for the name fields (Dick/Richard, Bob/Robert) and another rule to compare against standardized address field values for the address fields.

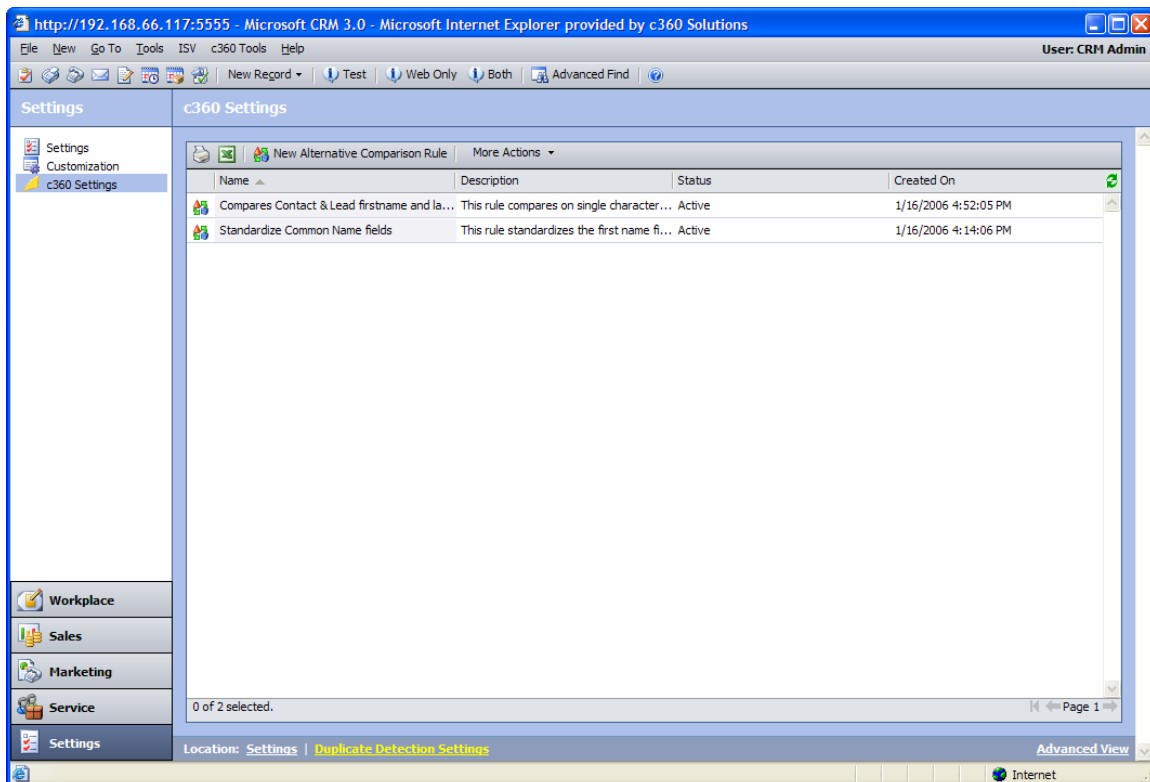


Figure 6: Alternative Comparison Rule

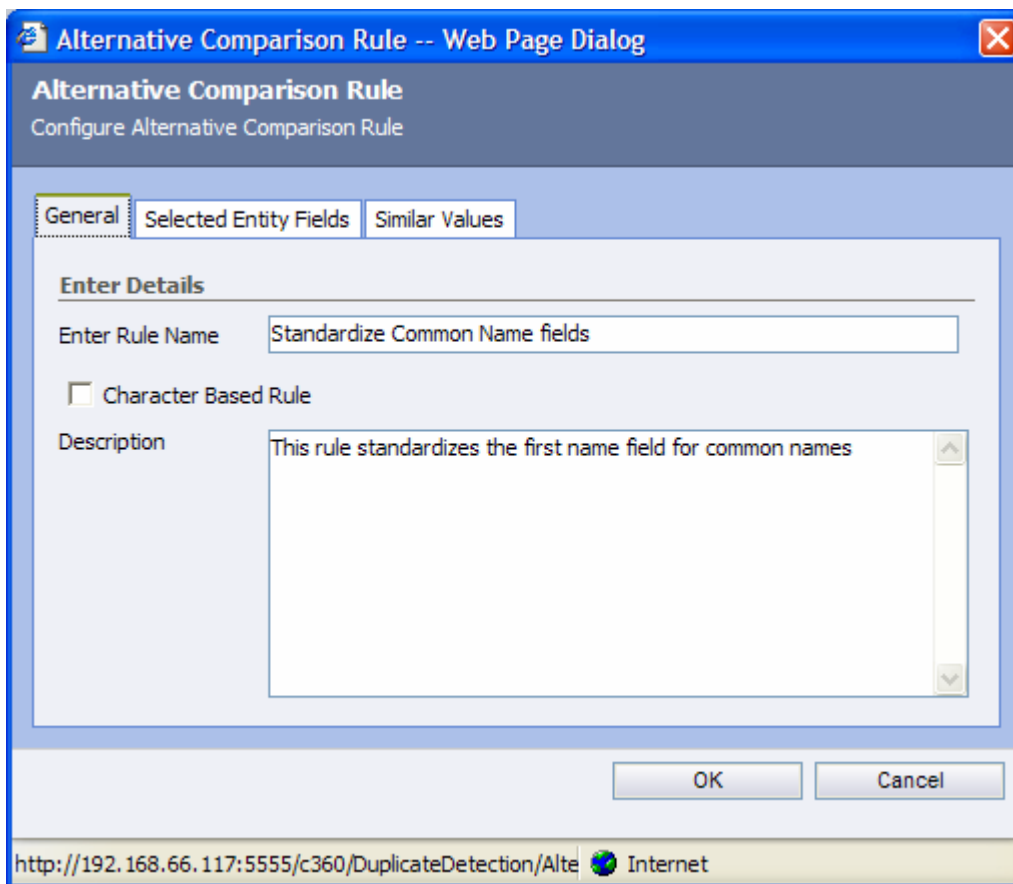
Note – Alternative Comparison Rules are used in conjunction with the match codes that have been configured using the Matchcode configuration options. So Alternative Comparison rules will only be enforced if there are match codes configured with the same fields

Name-Based Rule

Name-based rules are used to compare entire fields for similar values. For example, you can set the names 'Robert and Bob' to be compared similarly.

Let's see an example of how you would go about creating a new Alternative Comparison Rule.

1. Click on New Alternative Comparison Rule from the header grid.
2. Enter the rule name as well as a description on the 'General' tab, as shown in Figure 7.



The screenshot shows a web browser window titled "Alternative Comparison Rule -- Web Page Dialog". The main content area is titled "Alternative Comparison Rule" with the subtitle "Configure Alternative Comparison Rule". There are three tabs: "General" (selected), "Selected Entity Fields", and "Similar Values". Under the "General" tab, there is a section "Enter Details" with a text input field for "Enter Rule Name" containing "Standardize Common Name fields". Below this is a checkbox labeled "Character Based Rule" which is unchecked. A "Description" text area contains the text "This rule standardizes the first name field for common names". At the bottom of the dialog are "OK" and "Cancel" buttons. The browser's address bar shows the URL "http://192.168.66.117:5555/c360/DuplicateDetection/Alte" and the "Internet" icon.

Figure 7: Alternative Comparison Rule 'General' Tab

3. You can select the entity fields for which this rule should be applied to. You can pick fields from the Lead, Contact or Account entity. Figure 8 illustrates this.
 - a. In this example we have selected the Lead entity 'First Name' field and the Contact entity 'First Name' field.
 - b. This means that whenever a Lead or Contact record is inserted or updated, this Alternative Comparison rule will be compared.

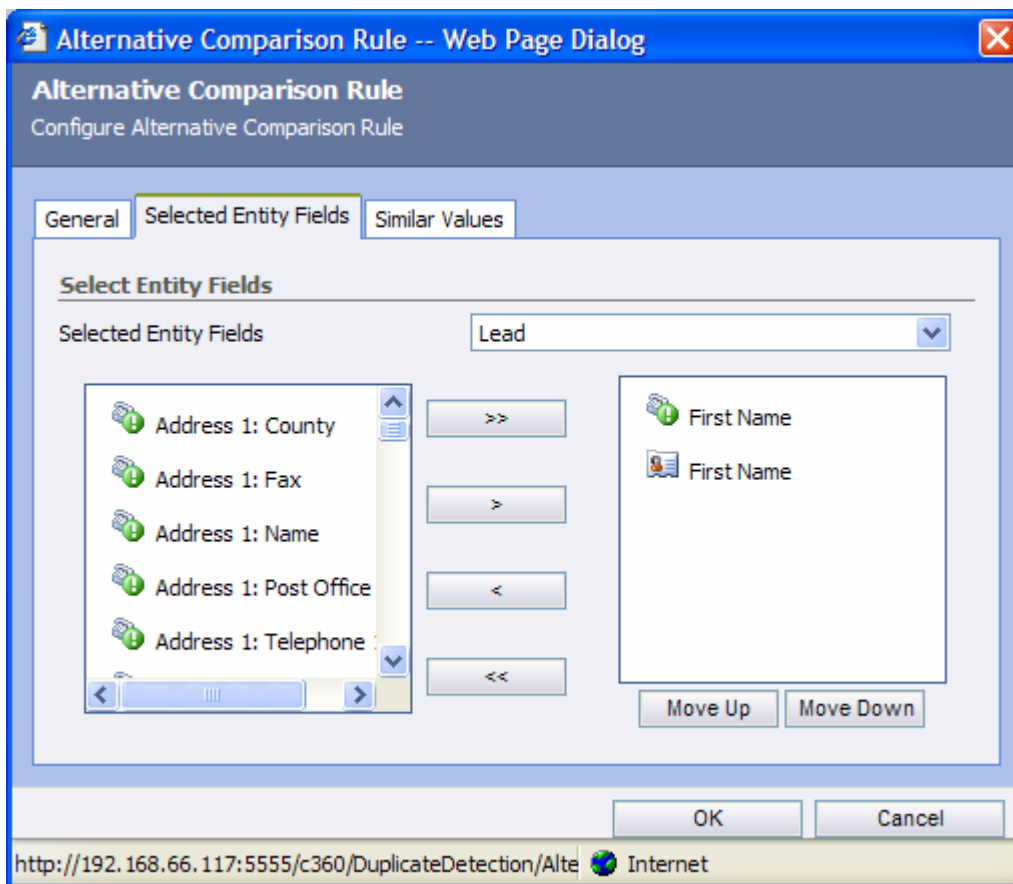


Figure 8: Alternative Comparison Rule 'Selected Entity Fields' Tab

4. You can select the similar values that you wish to compare on the Similar Values tab. See Figure 9 for illustration.

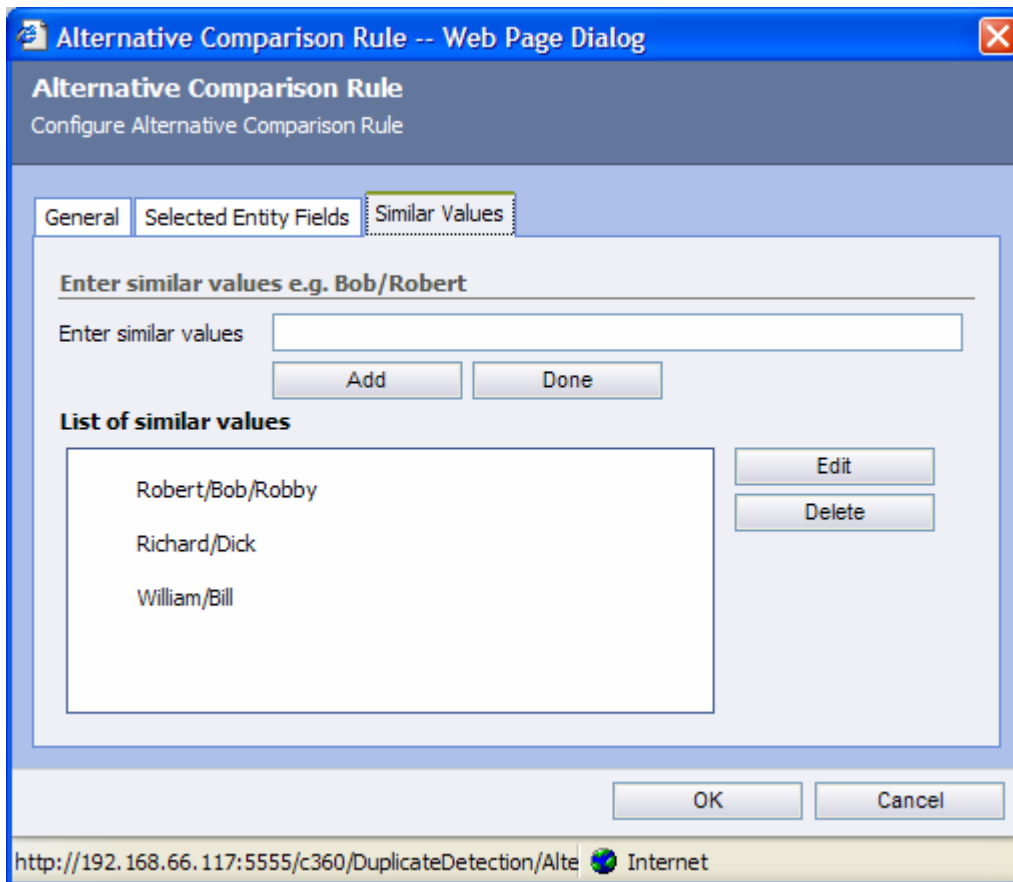


Figure 9: Alternative Comparison Rule 'Similar Values' Tab

Similar values can be entered in one of two ways

- Enter each similar value and then click on Add. So you would enter 'Robert', then hit Add, enter 'Bob', then hit Add, then enter 'Robby' and then hit Add. Once you are done with the similar values, you can click on 'Done'. You can now start a new Similar value the same way
- Enter the similar values all together using the '/' separator. So, you can enter "Robert/Bob/Robby" and click on Add.

So in this example, the similar values configured will be compared on the Lead first name and Contact first name field. So, every time you enter a new Contact with first name as 'Bob', it will be compared against all the existing records where first name is 'Robert' or 'Robby'.

Character-Based Rule

Similar to similar name value rules, you can also create character-based rule such as "e/é/ê/ë/è", "a/à". See Figure 10 for an illustration.

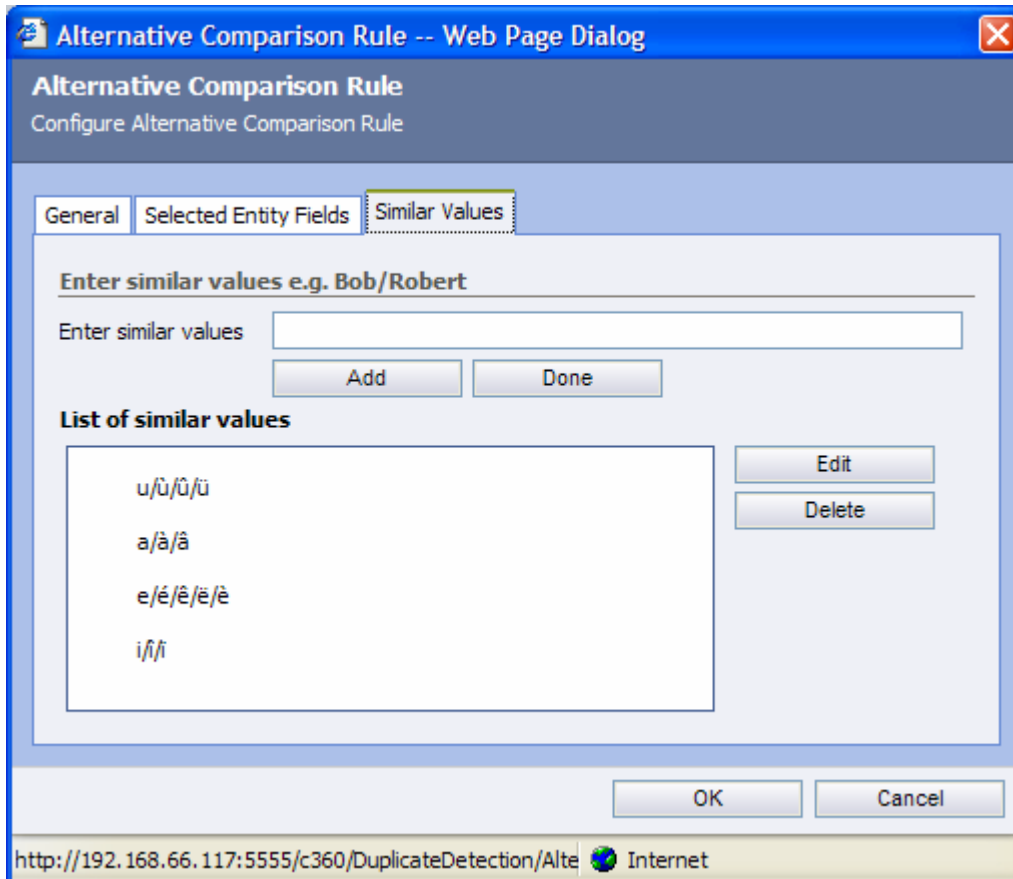


Figure 10: Character-Based rules

Character-based rules are used to compare any characters that match the rule for the selected fields.

For example, if you create a similar value for "e/é" for the Contact first name field, then if you enter a new Contact with name "Jérémie", it will be compared with all the Contacts in the system where firstname is "Jeremie".

As noted above, the character-based rule will only be enforced if there are match codes that have been configured using the Contact first name field.

Potential Duplicate Configuration Screen

The Potential Duplicate Configuration screen, shown in Figure 11, allows you to configure the fields displayed in the preview pane for the Potential Duplicate screens. The field configurations are used for both the PDD (Potential Duplicate Display) screen as well as the PDQ (Potential Duplicate Queue) screen.

The preview pane lets the CRM user quickly see details about the potential duplicate and evaluate whether the record is really a duplicate or not.

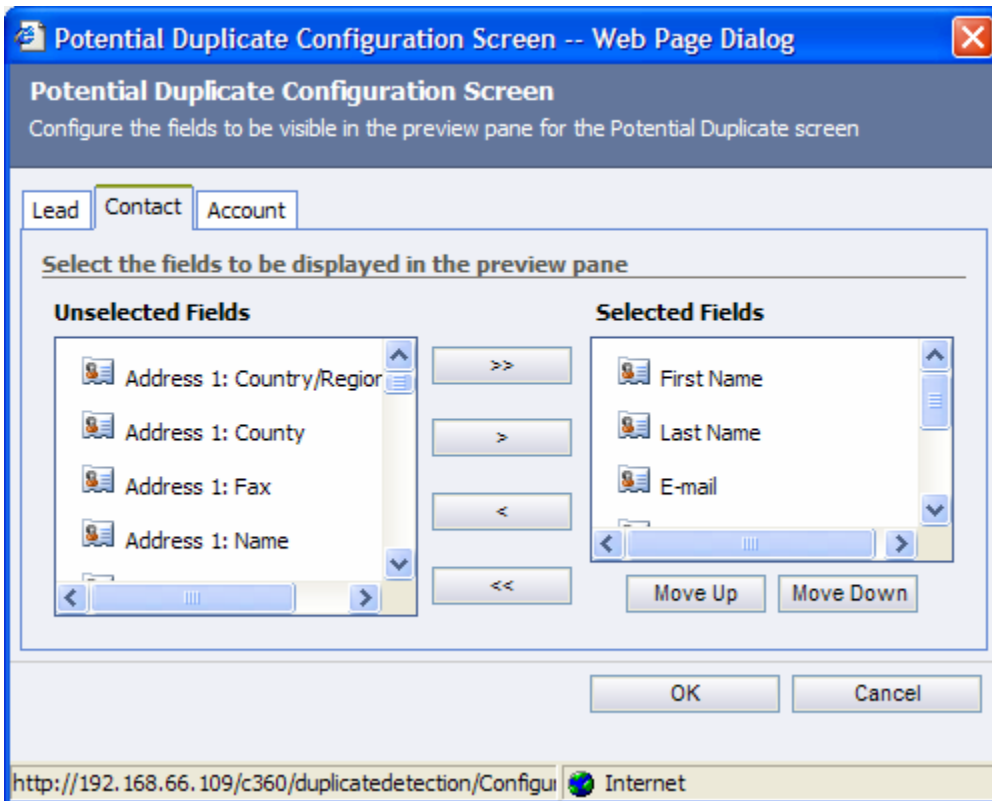


Figure 11: Potential Duplicate Configuration Screen

You can configure the preview pane for all the three (Lead, Contact, Account) entities.

Figure 12a shows the PDD preview pane and Figure 12b shows the PDQ preview pane for the selected Contact record. You can click on any record in the grid to see the preview of that selected record.

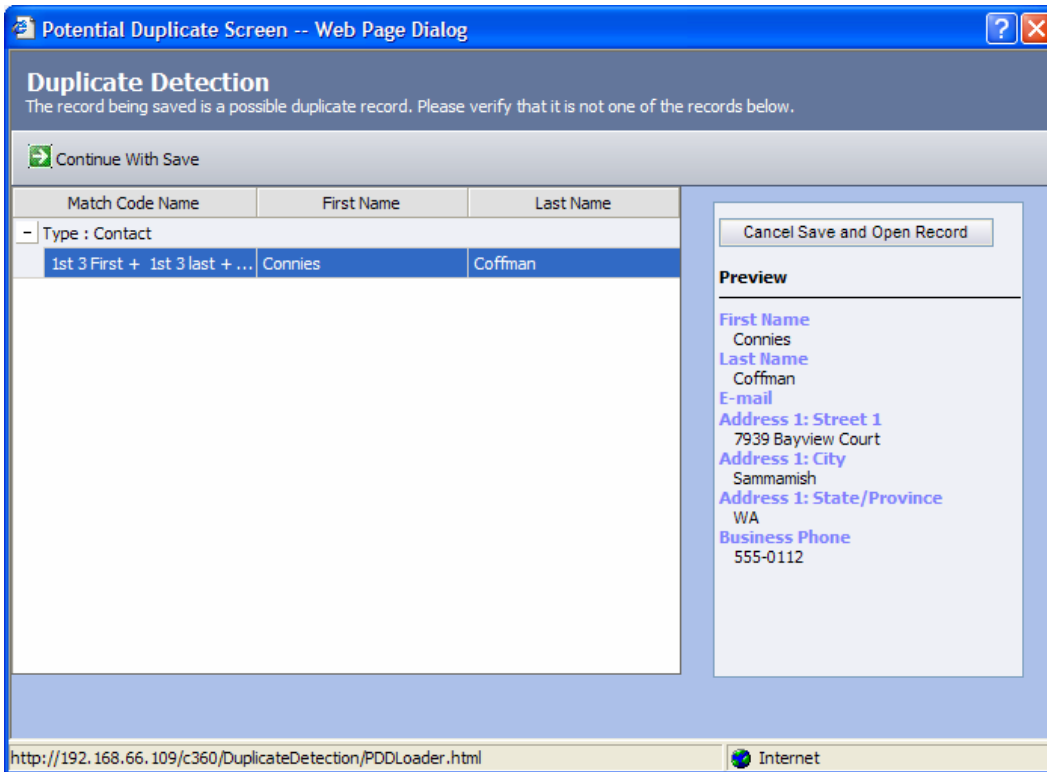


Figure 12a: Preview pane in PDD screen

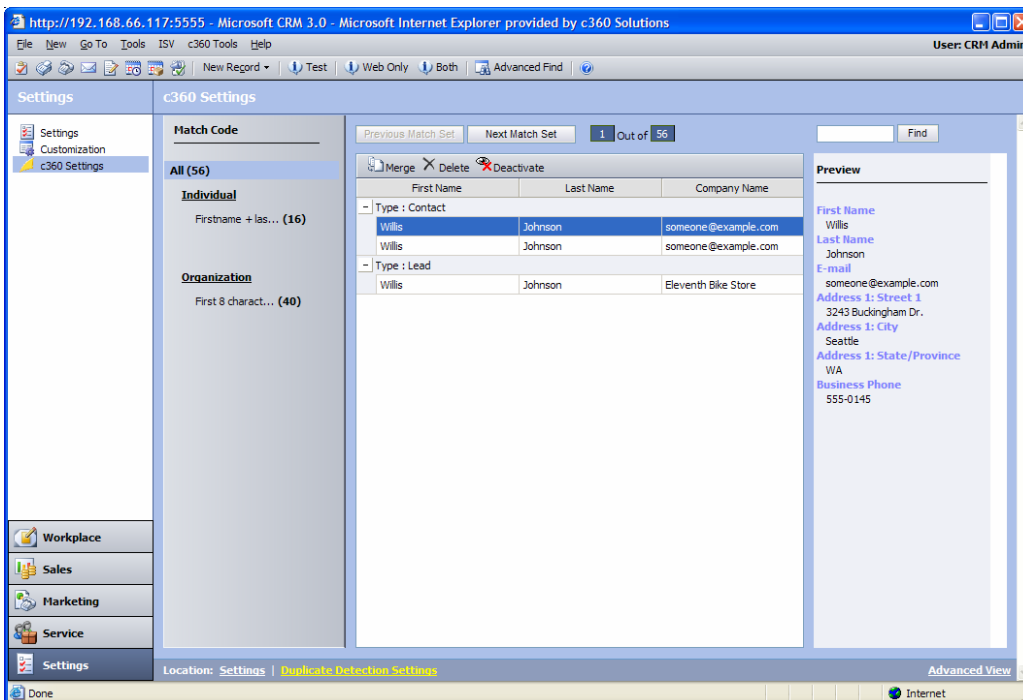


Figure 12b: Preview pane in PDQ screen

Match Codes

Match Codes allow the Administrators to setup configured match rules which will be enforced for comparing similar records and finding potential duplicates. Match codes allow you the flexibility to specify your own match conditions that can be used for identifying and eliminating duplicate records.

Configure Match Codes

You can configure match codes by clicking on the 'Configure and Generate Match Codes' link on the Duplicate Detection Settings page. See Figure 13 for the Match Code screen.

- *There are 2 different types of match codes (Individual and Organization):*
 - *Individual Match codes are enforced on all Contact and Lead records. So when a new Contact or Lead record is entered/updated, it will be compared against all existing Contact and Lead records*
 - *Organization Match codes are enforced on all Account and Lead records. So when a new Account or Lead record is entered/updated, it will be compared against all existing Account and Lead records*
- *Match codes are comprised of different components. Components are different object fields (Firstname, Lastname) that are used for duplicate comparison. If match code is created with different component, then each component criteria must be satisfied for a potential duplicate to be found.*
 - *So, if an individual match code has three components (first name, last name, city), then all the 3 components must satisfy the match criteria separately before a potential duplicate is identified*
- *Match code component can be made to either compare against entire field length, partial length (1st 5 characters), Soundex codes*
 - *So, if an individual match code component is setup to compare on the 1st 5 characters of a first name field, then first name such as 'Francisco', 'Francisca', 'Francis' will satisfy the match criteria*
- *You can define up to 5 different types of match codes per records type (Individual/Organization)*

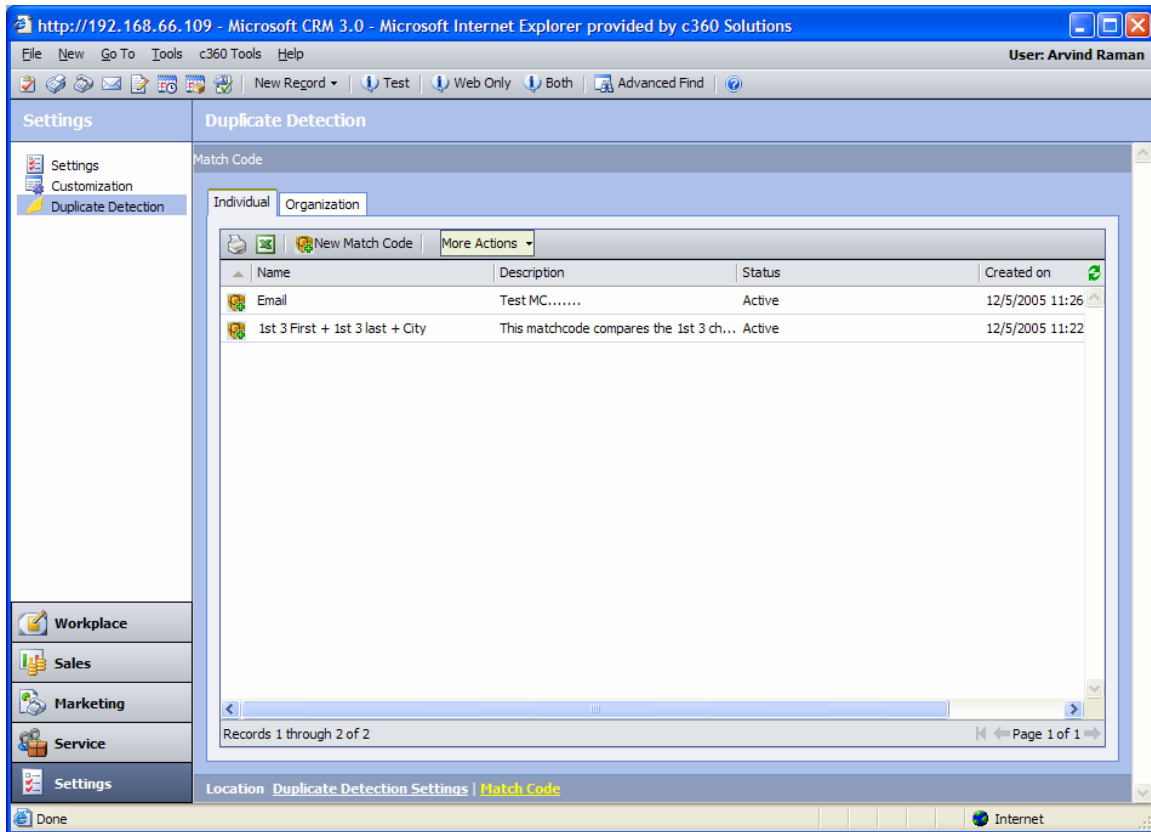


Figure 13: Configure and Generate Match Codes

Individual Match Codes

Individual Match codes are used to compare and find potential duplicates for Individual records. Individual records include all Lead and Contact records. So every time a new Lead or Contact is entered or updated, the Individual match code rules will be enforced and the record will be compared against all existing Lead and Contact records that satisfy the specified match conditions to find the potential duplicates.

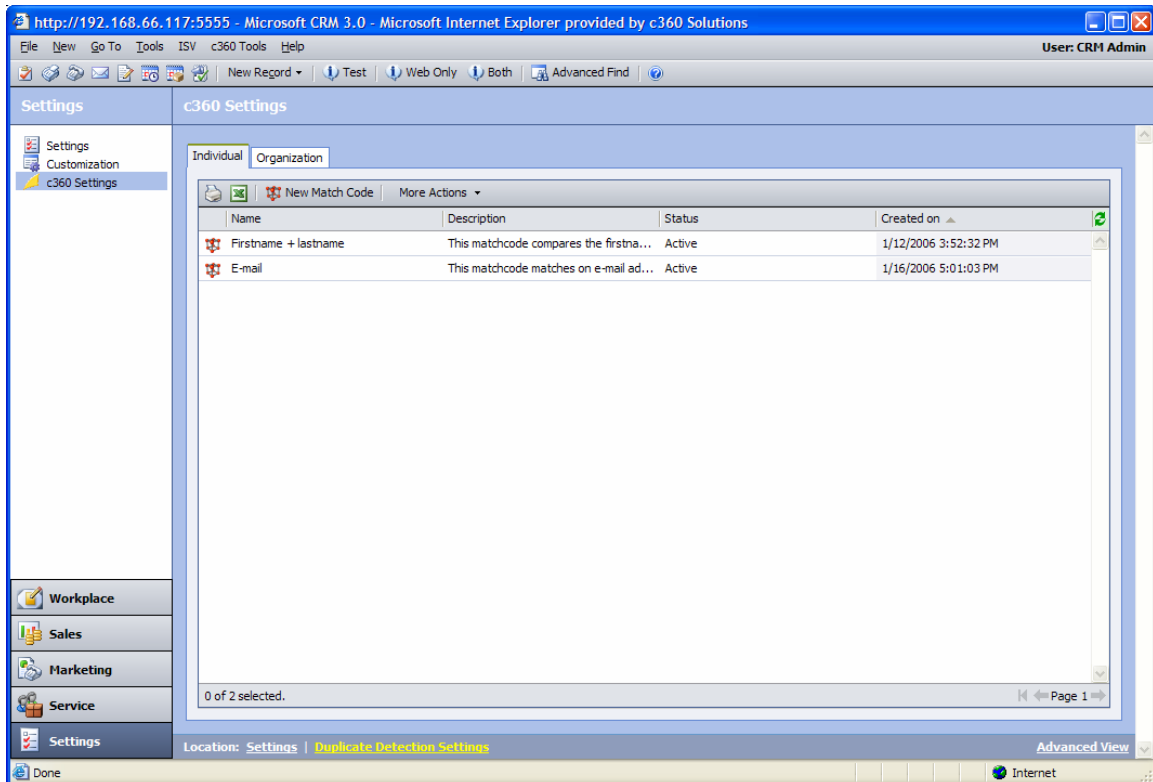


Figure 14: Individual Match codes

You can create a new match code by clicking on the 'New Match Code' icon. This will launch the Match Code Component Configuration screen as in Figure 15.

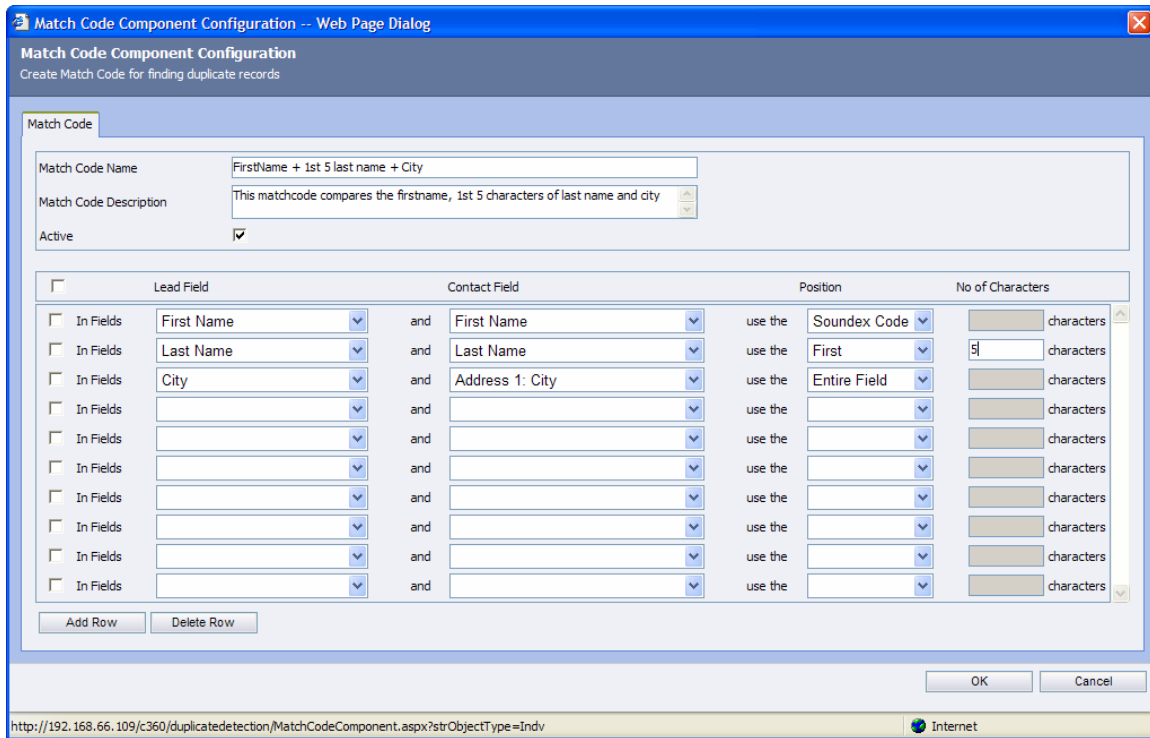


Figure 15: Individual Match Code Component Configuration

Below lists the different options you can configure in this screen

Match Code Name: The match code name will be displayed in the PDD and PDQ screen

Match Code Description: Detailed description of the match code

Active: Only active match codes will be used for potential duplicate comparisons

Match Code Components A Match code can be comprised of different components which will correspond to the entity fields

Lead Field: Select which Lead field to use for this component. You can select from the entire list of Lead entity fields

Contact Field: Corresponding Contact field used for the comparison. Note that most of the Contact fields have a 1-1 relationship with the Lead fields. So, when you enter a new Lead/Contact, it will be compared against both Lead and Contact entity based on field selected here

Position: Three options:
Entire Field - Compare the entire field
First – Select the first 'n' characters



Soundex – Compare against the soundex code

No of Characters: You can set the number of characters in this field

Individual Match Code Examples

Example 1 -

The sample Individual match code in Figure 12 is comprised of 3 components

- Lead 'First Name' field or Contact 'First Name' field: Soundex Code
- Lead 'Last Name' field or Contact 'Last Name' field: First 5 characters
- Lead 'City' field or Contact 'Address1: City' field: Entire field

In the above example, let's say we have a Lead in our CRM system with *Firstname - Jeremie; Lastname - Francis; City - Atlanta*, then all new Lead or Contact records inserted with following attributes will be identified as potential duplicates as shown below

'Jeremy Francis' in 'Atlanta'

'Jeremie Francisco' in 'Atlanta'

'Jeremy Francisco' in 'Atlanta'

Example 2 –

Let's create an Individual match code to be comprised of

- Entire 'First Name' field
- Entire 'Last Name' field
- Entire 'City' field

In this match code scenario, it means that all the 3 different fields have to be the same as per the match code configuration before a potential duplicate is found.

Example 3 –

In this example, let's create an Individual match code to be comprised of

- Entire 'First Name' field
- First 5 characters of 'Last Name' field
- Entire 'City' field

So, if you have a Contact record with name "Cindy Francis" and city "Atlanta", all potential duplicates will be identified whenever a new Individual (Contact or Lead) is entered where first name is "Cindy", last name begins with "Franc" and city "Atlanta". In this case "Cindy Francisco" in city "Atlanta" will be a potential duplicate to "Cindy Francis" in city "Atlanta"

Organization Match Codes

Organization Match codes are used to compare and find potential duplicates for organization records. Organization records include all Lead and Account records. So every time a new Lead or Account is entered or updated, the Organization match code rules will be enforced and the record will be compared against all existing Lead and Account records that satisfy the specified match conditions to find the potential

duplicates. The organization match code screen can be accessed by clicking on the 'Organization' tab. See Figure 16 for an illustration

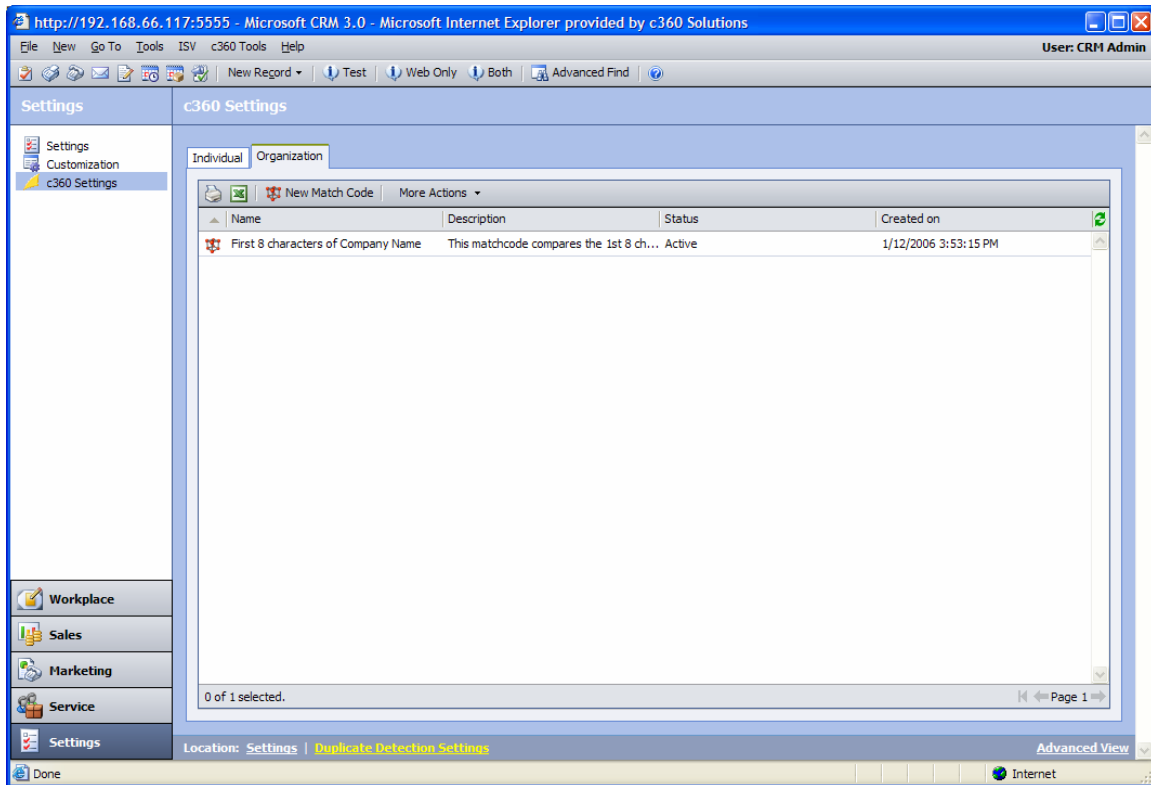


Figure 16: Organization Match Code

You can create a new match code by clicking on the 'New Match Code' icon. This will launch the Match Code Component Configuration screen as in Figure 17.

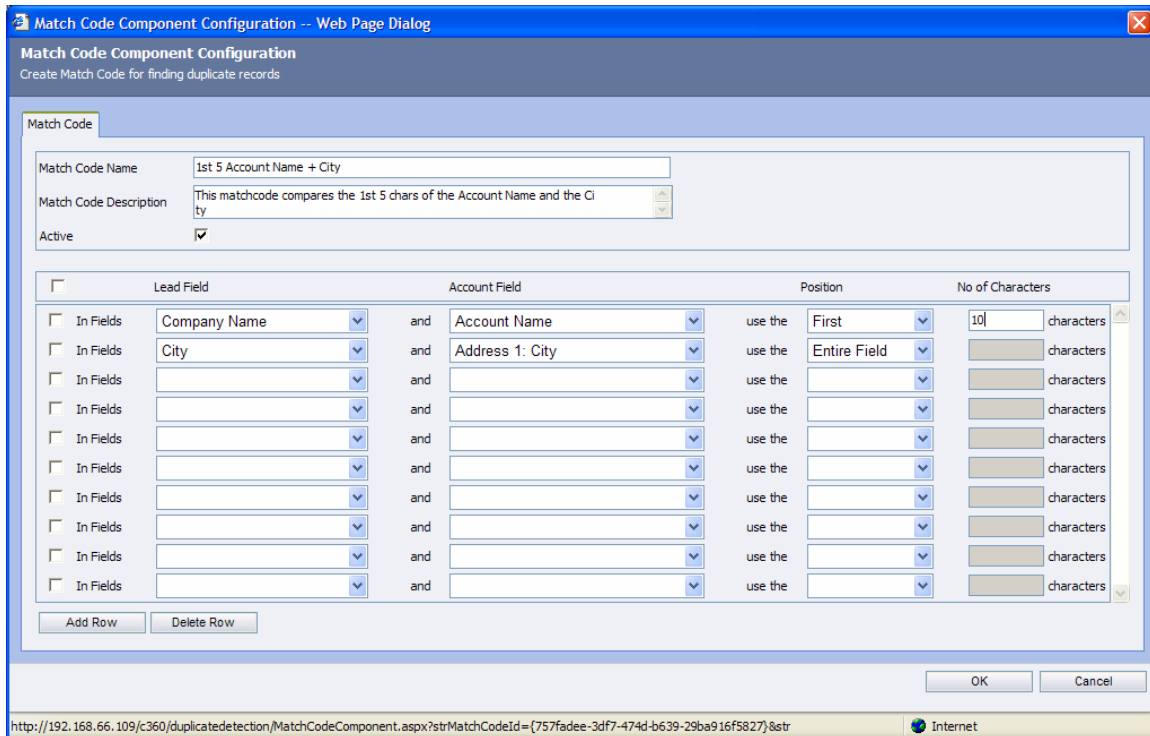


Figure 17: Organization Match Code Component Configuration

Match Code Name: The match code name will be displayed in the PDD and PDQ screen

Match Code Description: Detailed description of the match code

Active: Only active match codes will be used for potential duplicate comparisons

Match Code Components A Match code can be comprised of different components which will correspond to the entity fields

Lead Field: Select which Lead field to use for this component. You can select from the entire list of Lead entity fields

Contact Field: Corresponding Account field used for the comparison. Note that most of the Account fields have a 1-1 relationship with the Lead fields. So, when you enter a new Lead/Account, it will be compared both against the existing Lead and Contact entities based on field selected here

Position: Three options:
Entire Field - Compare the entire field
First – Select the first 'n' characters
Soundex – Compare against the soundex code

No of Characters: You can set the number of characters in this field

Organization Match Code Examples

Example 1 -

The sample Individual match code in Figure xx is comprised of 2 components

- Lead 'Company Name' field or Account 'Account Name' field: First 10 characters
- Lead 'City' field or Contact 'Address1: City' field: Entire field

In the above example, let's say we have a Lead in our CRM system with *Company Name – Microstrategy Inc; City – Atlanta*, then all new Lead or Account records inserted with following attributes will be identified as potential duplicates as shown below

'Microstrategy Corp' in 'Atlanta'

'Microstrategy LLC' in 'Atlanta'

'Microstrategy Solutions Inc' in 'Atlanta'

Other Actions

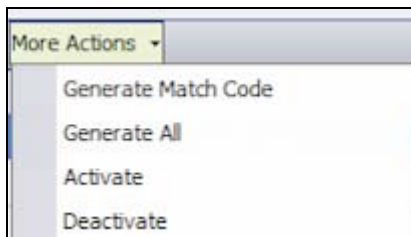


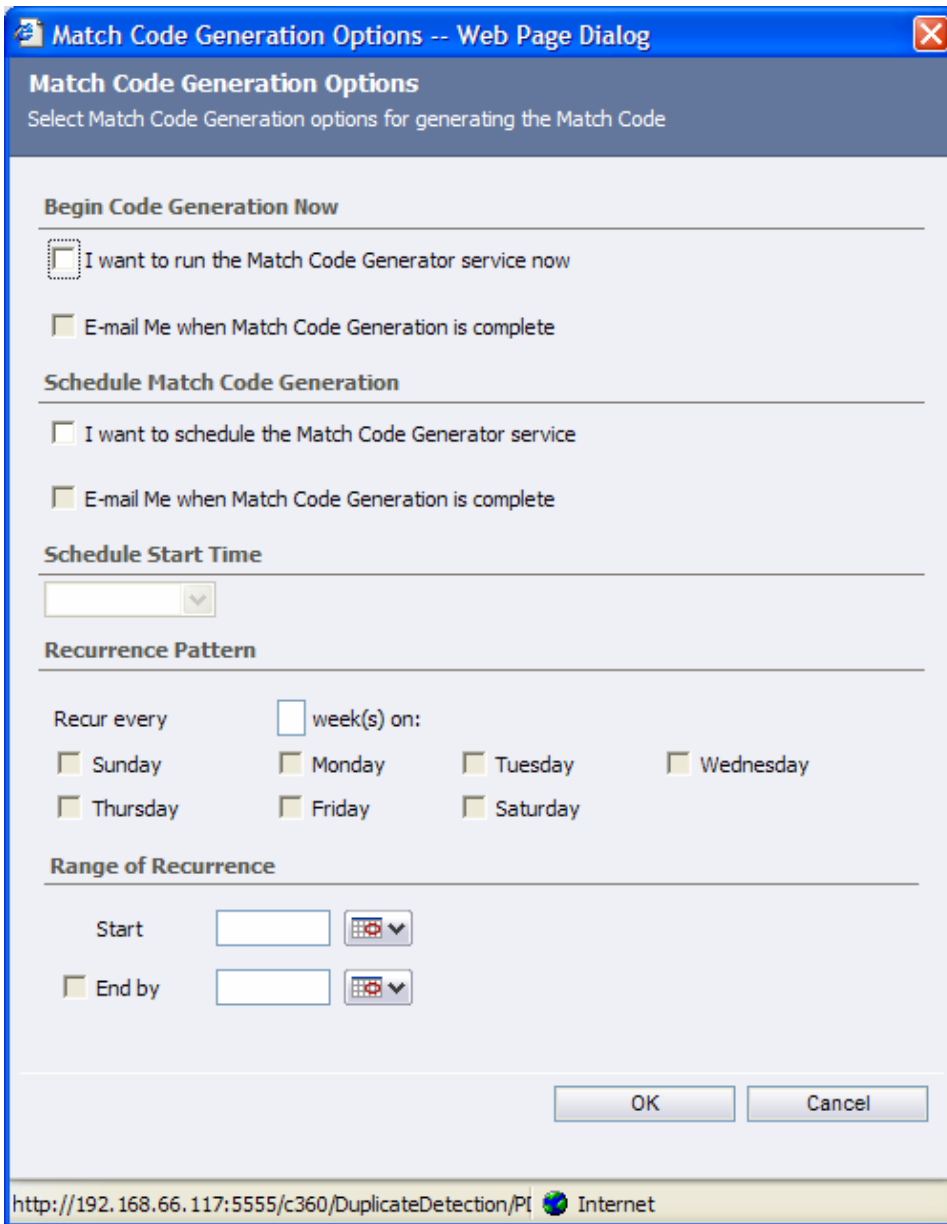
Figure 18

The Other Actions menu, as shown in Figure 18, on the match code grid allows you to:

- *Generate Match Code* Generate match codes for the highlighted matchcodes in the grid
Note – This is especially useful if you change a match code component and need to update the data for that particular match code
- *Generate All* Generate match codes for all the configured matchcodes that are Active
- *Activate* Set the highlighted match code as active
- *Deactivate* Set the highlighted match code as inactive

Schedule or Run Match Code Generation

The Match Code Generation option can be launched by clicking on 'Schedule or Run Match Code Generation' link on the main Duplicate Detection Settings page. This is shown in Figure 19.



Match Code Generation Options -- Web Page Dialog

Match Code Generation Options
Select Match Code Generation options for generating the Match Code

Begin Code Generation Now

I want to run the Match Code Generator service now

E-mail Me when Match Code Generation is complete

Schedule Match Code Generation

I want to schedule the Match Code Generator service

E-mail Me when Match Code Generation is complete

Schedule Start Time

▼


Recurrence Pattern


Recur every week(s) on:

Sunday Monday Tuesday Wednesday

Thursday Friday Saturday

Range of Recurrence

Start 

End by 

OK Cancel


http://192.168.66.117:5555/c360/DuplicateDetection/PI 

Figure 19: Schedule or Run Match Code Generation Screen

From this screen, you can either

- Run the match code generator service
- Schedule the match code generation service
 - o Its also possible to setup a recurrence generation service during which times the system is not in heavy use

Note:

- c360 recommends scheduling the match code generation service once a week on a Sunday (when system load is low).
- If the match code generation service is in progress while a user is entering data, they will see a message saying 'System is identifying duplicates. Duplicate screen cannot be displayed'

It is also possible to generate the match code values for just a single match code type. This can be done in the match code grid by

- ➔ Highlighting the match code (Figure 20)
- ➔ Click on More Actions -> Generate Match code
- ➔ This will launch the Match Code generation screen for that highlighted match code (Figure 21)

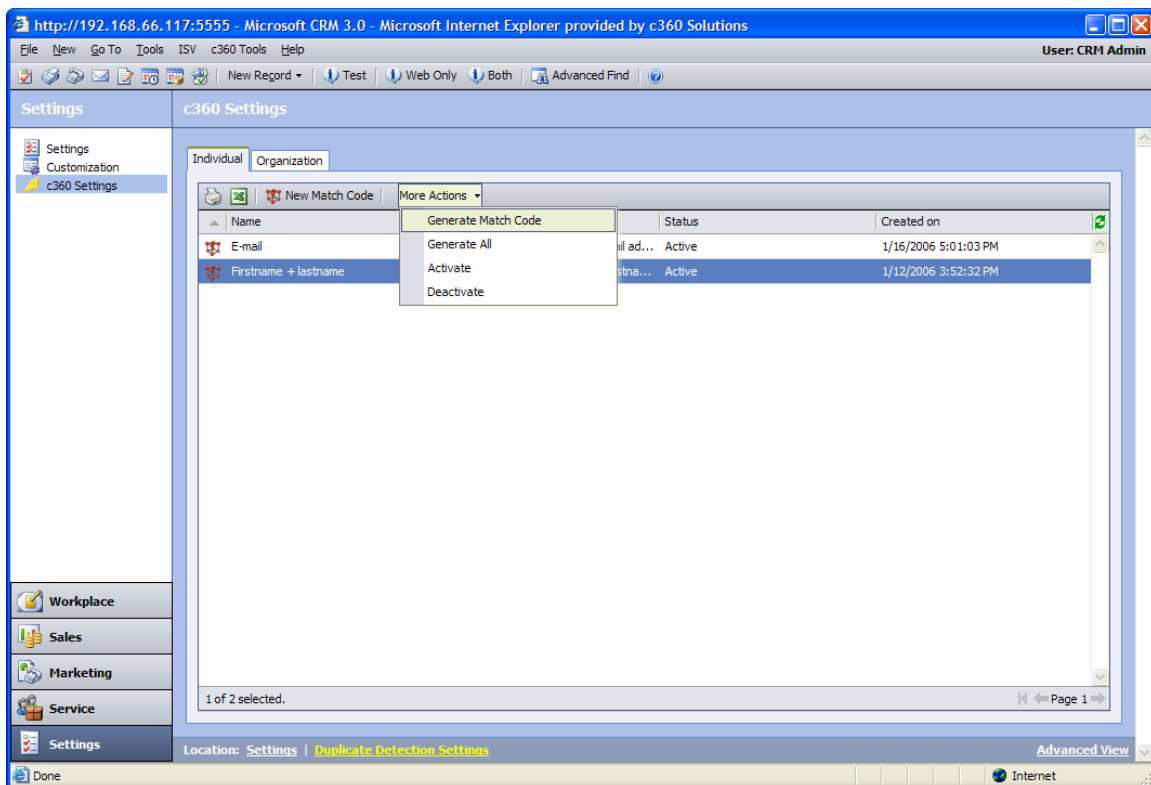


Figure 20: Highlighting a match code

Match Code Generation -- Web Page Dialog

Match Code Generation
Start the Match Code Creation process

The Match Code "Firstname + lastname" will be generated

Begin Code Generation Now

I want to run the Match Code Generator service now


E-mail me when Match Code generation process is complete

Schedule Match Code Generation


I want to schedule the Match Code Generator service

E-mail me when Match Code generation process is complete

Start Date

01/16/2006 

Schedule Start Time

12:00PM 

Note: Match Code Generation will run in the background.

OK Cancel


http://192.168.66.117:5555/c360/DuplicateDetection/Match  Internet

Figure 21: Generating a single match code

View Potential Duplicates

Potential Duplicate Queue

The Potential Duplicate Queue can be accessed by clicking on 'View Potential Duplicates' icon found in the Duplicate Detection Settings area. This screen displays a set of two or more potential duplicates for all the active match codes. See Figure 22 for an illustration.

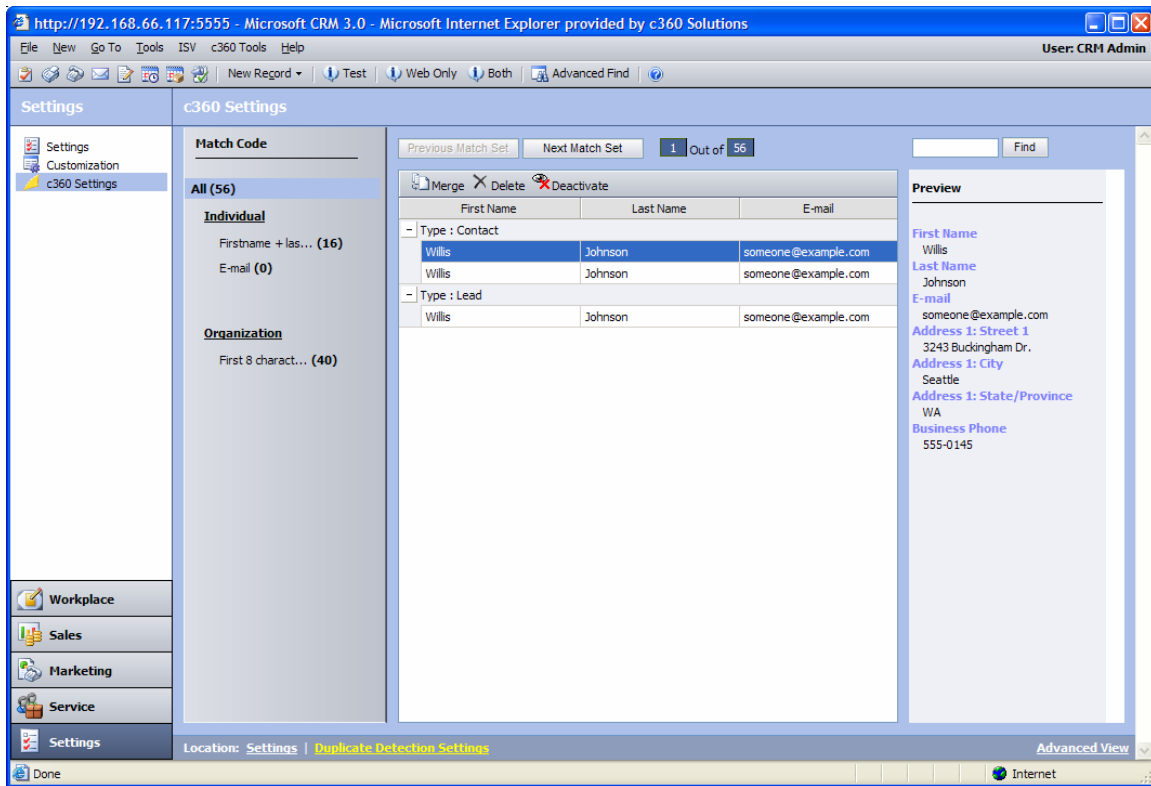


Figure 22: Potential Duplicate Queue

Features of Potential Duplicate Queue

- The left hand side of the PDQ screen displays the active match codes as well as a count of the potential duplicates for each distinct match code.
- Clicking on the match code will display the potential duplicate set. The right hand side contains a preview pane where you can get more details about the selected record. The preview pane is fully configurable via Global Preferences
- You can page through every set of potential duplicates by clicking on Next Match Set



- Specific actions can be performed on these records to eliminate the duplicate records. Actions include merging, deleting or de-activating the record.
- Find option lets you quickly search for items in the potential duplicate queue

Actions on the Potential Duplicate Records

Merge: From a potential duplicate set, you can merge the records that have been identified as duplicates. Records can be merged together two at a time by selecting both records. The two records that you want to merge have to be the same entity type (Lead, Contact or Account); so you cannot merge a Lead record with an Account record. Clicking on Merge will take you to the CRM Merge screen that lets you set various options (Figure xx).

Note – The master record will inherit all of the subordinate record's child records. The subordinate record will be deactivated

Delete: Delete any number of records from a potential duplicate set by selecting the records and clicking on 'Delete'.

Note – Deleting potential duplicate records will remove it from the CRM system and you will any child records or information that is associated with it

Deactivate: Deactivate any number of records from a potential duplicate set by selecting the records and clicking on 'Deactivate'.

Note – A deactivated record can be set as active again by opening the specific record and going to Actions menu.

Merge Records -- Web Page Dialog

Merge Records
 Select the master record, and then select the fields to merge into the master record. The master record will inherit all of the subordinate record's child records. The subordinate record will be deactivated.

Master Record and Field Selection

Master Record : Amuzing bikes Basic Bike Company

Select all fields in this section Select all fields in this section

Account Name	<input checked="" type="radio"/> Amuzing bikes	<input type="radio"/> Basic Bike Company
Account Number	<input checked="" type="radio"/>	<input type="radio"/> BABCO88H
Relationship Type	<input checked="" type="radio"/> Customer	<input type="radio"/> Customer
Main Phone	<input checked="" type="radio"/> 555-0131	<input type="radio"/> 555-0116
E-mail	<input checked="" type="radio"/> someone@example.com	<input type="radio"/> someone@example.com
Address	<input checked="" type="radio"/> Select all fields in this section	<input type="radio"/> Select all fields in this section
Street 1	<input checked="" type="radio"/> 9906 Oak Grove Road	<input type="radio"/> 137 Lancelot Dr
City	<input checked="" type="radio"/> Redmond	<input type="radio"/> Phoenix
State/Province	<input checked="" type="radio"/> WA	<input type="radio"/> CA
ZIP/Postal Code	<input checked="" type="radio"/> 80803	<input type="radio"/> 10032
Country/Region	<input checked="" type="radio"/> U.S.	<input type="radio"/> U.S.
Phone	<input checked="" type="radio"/> 555-0164	<input type="radio"/> 555-0132

Select all fields with data. If both records have data in the same field, the master record field is selected.

Note: The master record will inherit all of the subordinate record's child records. The subordinate record will be deactivated.

Help OK Cancel

http://192.168.66.109/_grid/cmds/dlg_merge.aspx?ObjType=1&Total=2&Ids={8A34B14D-4DF1-41B3-A963-AC0AE!} Internet

Figure 23: Merging duplicate records

Potential Duplicate Display

When you enter or update a Contact, Lead or Account record in CRM, the Potential Duplicate Display screen is automatically launched if duplicates are identified for the record that is being entered. See Figure 24 for an illustration of the Potential Duplicate screen.

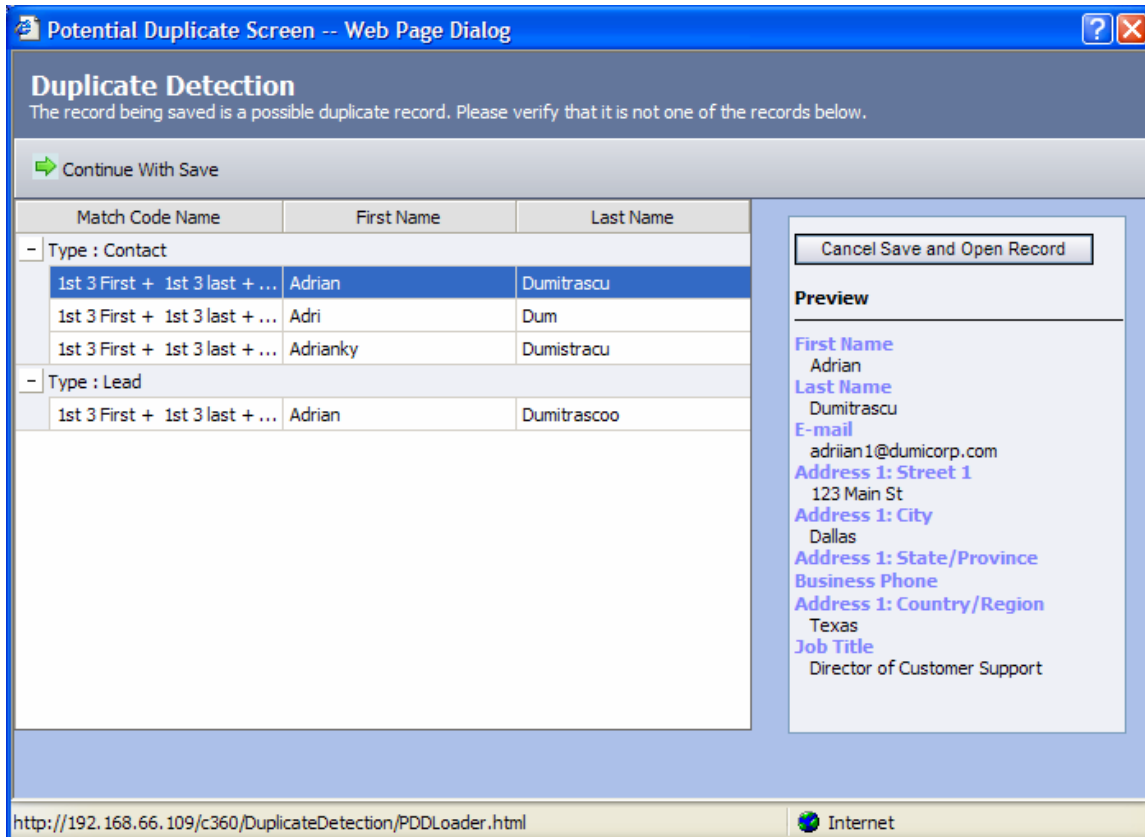


Figure 24: Potential Duplicate Detection Screen

Potential Duplicate Identification

- Contact records will be compared against existing Contact and Lead records using the Individual match codes
- Account records will be compared against existing Account and Lead records using the Organization match codes
- Lead records will be compared against existing Lead, Contact and Account records.
 - Compared against Contact using Individual match codes
 - Compared against Account using Organization match codes
 - Compared against Leads using BOTH individual and organization match codes

Note: The Potential Duplicate screen will respect the global settings configured by the administrator. So, if the administrator has turned off Lead records, then Lead records will not be used for Potential Duplicate identification

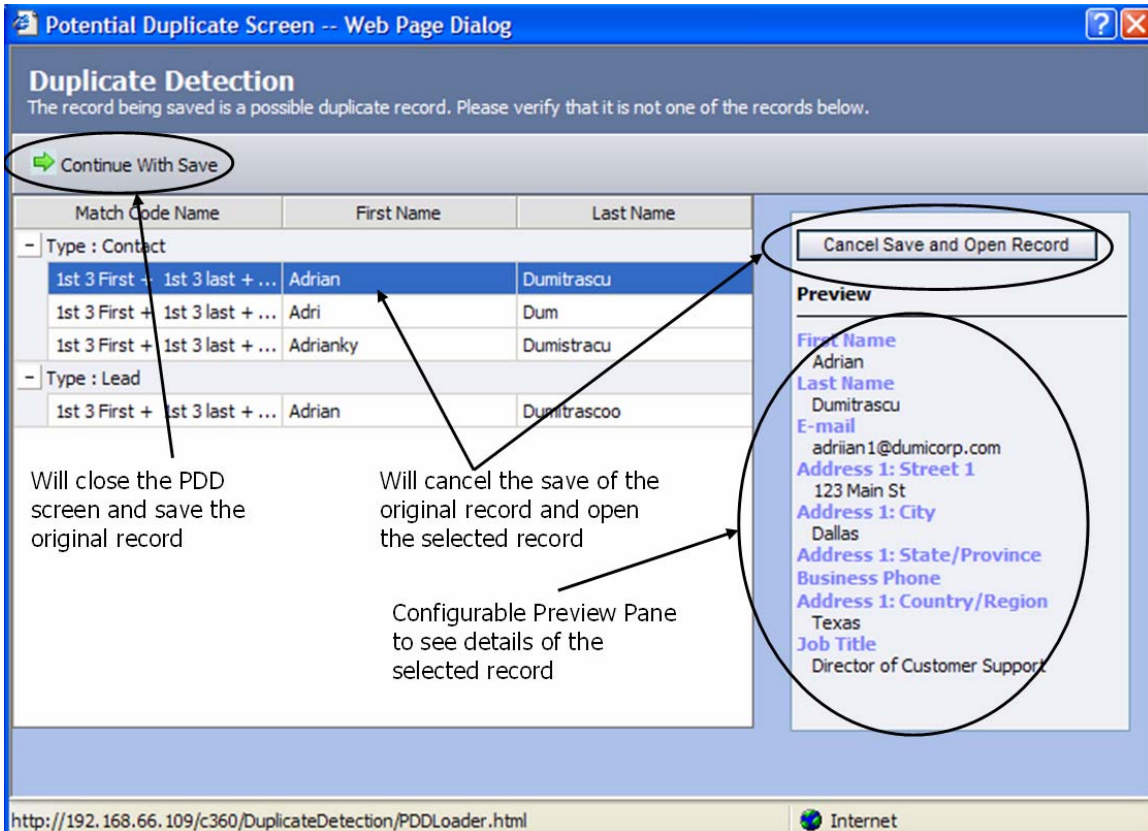


Figure 25: Actions on PDD screen

Actions Possible

Cancel Save and Open – Will close the PDD screen and open the highlighted record

Continue with Save – Will continue the save of the record being entered

See Figure 25 for an illustration.

Preview Pane

Users can quickly see details about the potential duplicate record by highlighting the record and seeing the various details in the preview pane on the right hand side.

See Figure 25 for an illustration.



Troubleshooting ---

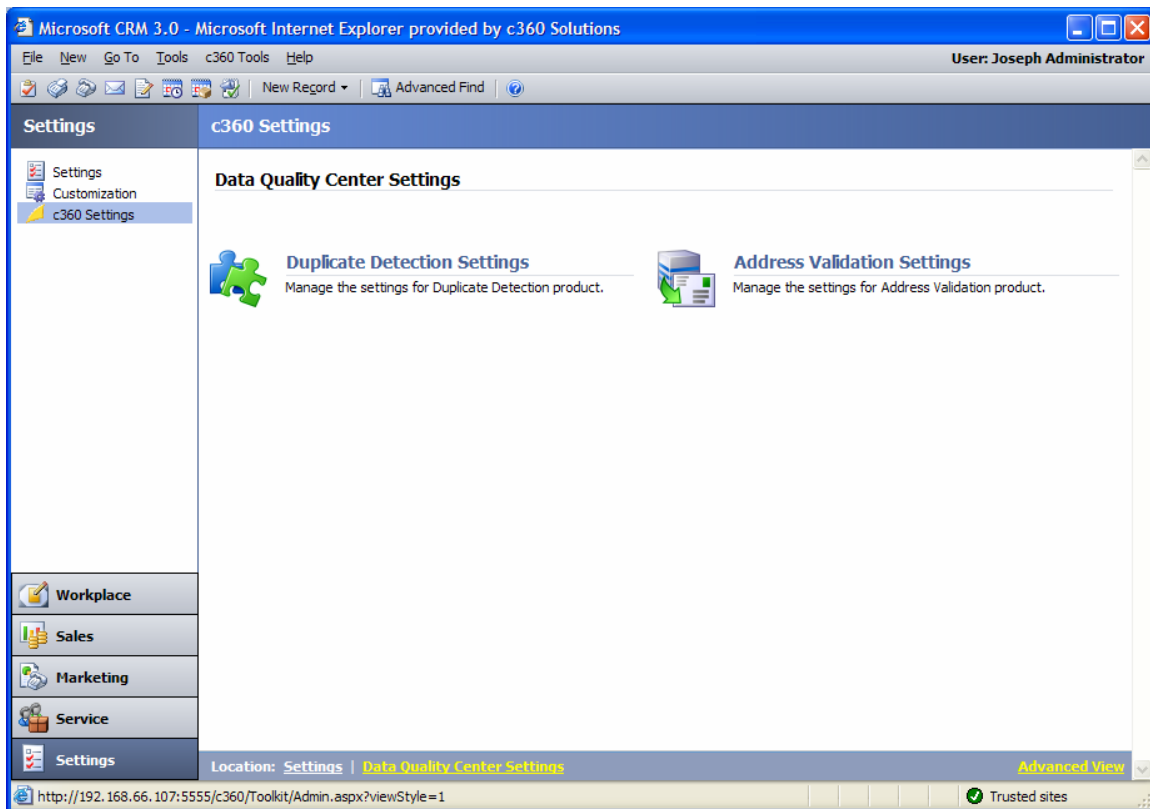
For support issues, please visit the c360 Support website at <http://www.c360.com/Support>

Appendix

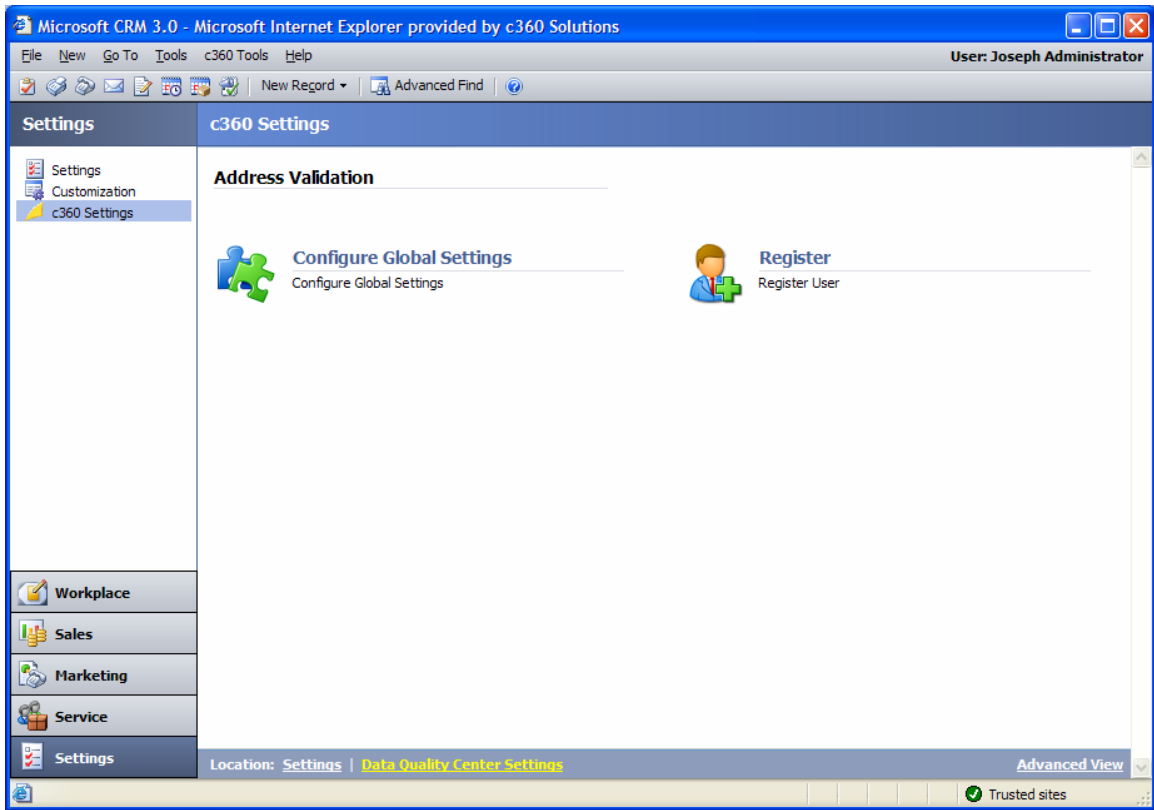
A: Register/Activate Strikelron Account for Address Validation

In order to utilize the Address Validation real-time verification service, the administrator needs to register and activate the Strikelron account. Outlined below are steps to do this:

1. Go to 'Data Quality Center Settings' by clicking on Settings -> c360 Settings -> Data Quality Center Settings

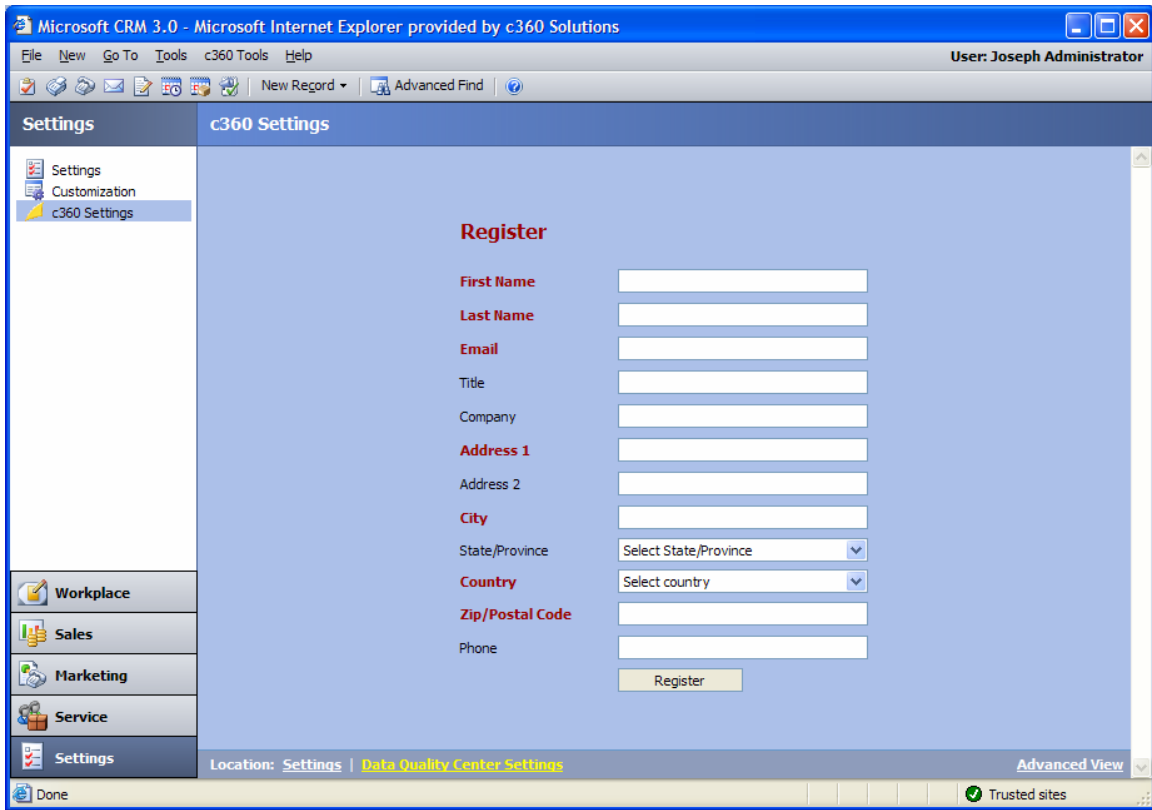


2. Click on Address Validation Settings

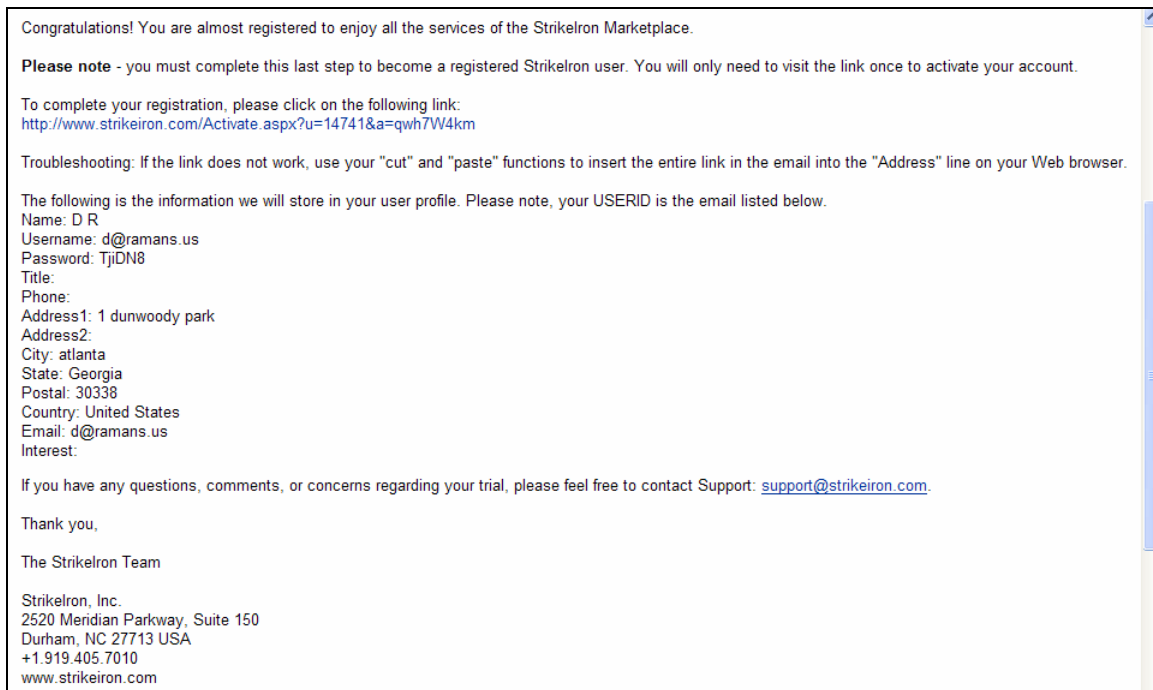


3. Click on Register
 - a. This option allows the administrator to register for an Address Validation account.
 - b. Enter information and click on Submit

Note: Please enter a valid email address which can be accessed as the email address is used as the login id.



4. You should receive an email in your Inbox from 'StrikeIron Sales'



5. Complete your registration by clicking on the link in the email



6. Your Strikelron account is now activated.

Note: You can login to your Strikelron account page by going to <http://www.strikeiron.com>

Strikelron provides you with 1000 free address verification hits after which the cost is just \$0.04 per hit. The Strikelron page provides you real-time data with the available number of free hits (See example below). You can purchase additional hits by anytime from this page.

Home > Your Account

My Web Services

The My Web Services page provides a complete listing of all your Strikelron Marketplace trial and paid subscriptions. [Help](#) is provided at the bottom of the page.

[Manage](#) | [Purchase/Trial](#)

Master Key: 0F9AAC25F577DE542BD4 [What's this?](#)

Notes: If you have two license keys for the same Web service (from trials or multiple subscriptions), you must use your license key versus your user ID and Password to invoke the Web service.

License keys for One-time purchases cannot be upgraded. A new key must be purchased.

Show:

Display Name	Remaining Hits	Subscribed Hits	Type	Expires	Status	Key	Action
c360 US Address Verification 4.0	988	1,000	Trial	-	Active	52A9A1F553401FF77C44	upgrade wsdl analyze

Help

Master Key
This is the unique license key associated with your subscription for the Web services that you subscribed to through an ISV. Your email address is associated with this license key to enable you to only have to use your email address and password for access.

***One-time Purchase Keys**
Strikelron recommends that you use your UserID (email) and password to invoke this service instead of the License key. One-time purchases can not be upgraded, you must purchase a new license to get another set of hits.

Sort
You can do an ascending or descending sort for Display name, Remaining Hits, Type, and Status by simply clicking on the column name headers.

Display Name

A: Cost of Address Validation

Strikelron provides you with 1000 free address verification hits after which the cost is just \$0.04 per hit. The Strikelron page provides you real-time data with the available number of free hits (See example below). You can purchase additional hits by anytime from Strikelron page