

Data8 Duplicare Service Definition Document G-Cloud 15

Overview

data8 duplicare™ is an automated de-duplication tool for Microsoft Dynamic 365. It offers the ability to merge multiple records with all fields, and customisable quick merge bulk de-duping of existing records, all within Dynamic 365. In addition, data8 duplicare™ provides advanced duplicate prevention at point of entry, and the ability to merge multiple records with all fields, including custom entities, at point of entry.

The data8 duplicare™ dashboard provides a powerful tool for both CRM and sales professionals within the enterprise to monitor where and when duplicates are being created, *and by whom!*

Description	Output	Marc Carrington	Marc Karrington	Mark Carrington	Mark Carrington	Mark Harrington
		Make Master	Make Master	Master	Make Master	Make Master
▼ Header						
Owner *		CRM Administratc	CRM Administratc	Mark Carrington	CRM Administratc	Mark Carrington
▼ CONTACT INFORMATION						
		Select All	Select All	Select All	Select All	Select All
First Name *	Mark	Marc	Marc	Mark	Mark	Mark
Last Name *	Carrington	Carrington	Karrington	Carrington	Carrington	Harrington
Job Title						
Company Name	Data8 Ltd	Data8 Ltd	Data8 Ltd	Data8 Ltd	Data8 Ltd	Data8 Ltd
Email	markc@data-8.	markc@data-8.co.uk		markc@data-8.co.uk		
Business Phone						

Merge Cancel

Unlike the native Dynamics duplicate screen, which only allows 2 records to be merged, in data8 duplicare™ there is no limit to the number, other than the size of your screen.

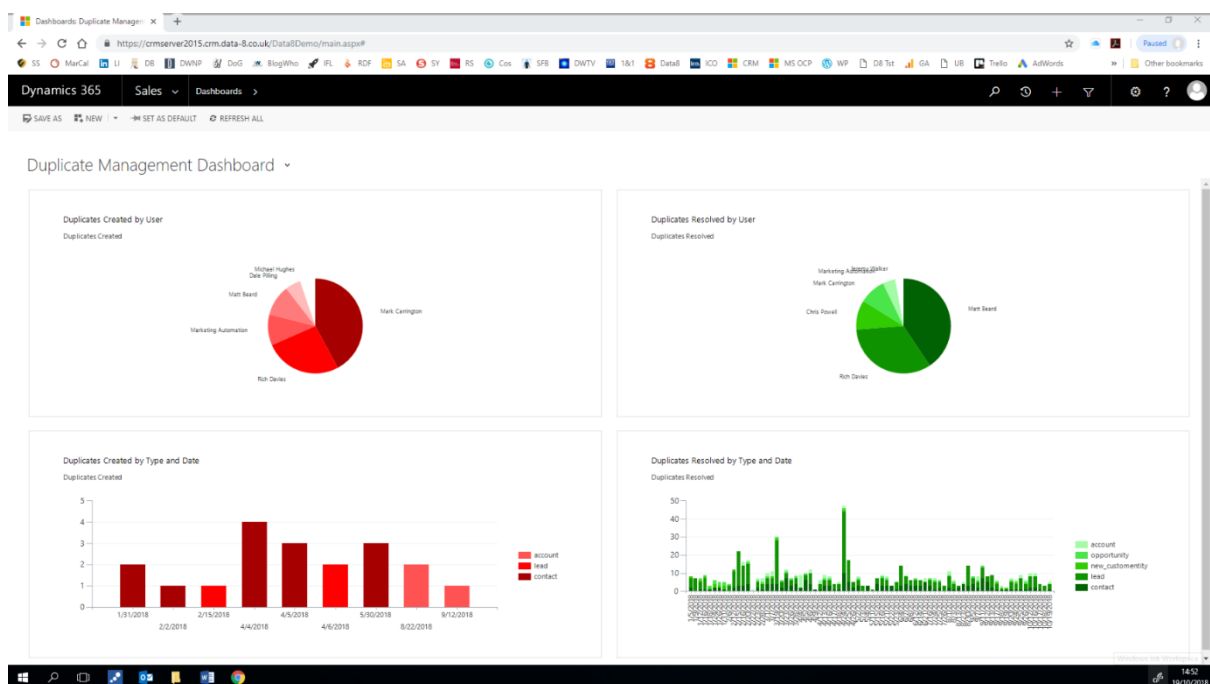
Dedupe Rules

The screenshot shows the 'Dedupe+ Rule: Account Sample' configuration page. The rule is named 'Account Sample' and is set to 'Active'. The base record type is 'account' and the matching record type is also 'account'. Real-time matching is enabled. The rule is configured with the following conditions:

- And:** Only match records where Status equals Active.
- Or:**
 - A non-conflicting match from Main Phone.
 - Fuzzy company name match from Address 2: Name.
 - Fuzzy person name match from Address 1: Primary Contact Name.

The rule is currently set to 'Active'.

Custom matching rules, using multiple Boolean operations and advanced fuzzy-logic matching, can be created in data8 duplicare™



Dashboard shows which users have been creating duplicates and which have been removing them so that managers can reward or support accordingly.

Features and Benefits

Easy to use & interpret duplicate dashboard.	A powerful tool for both CRM and sales professionals within the enterprise to monitor who is creating duplicates, and who is resolving them. Can be used to incentivise CRM users via merge rule preference functionality (reward or support).
Multi merge of everything tool.	Merge any number of entity records into the master record, with the flexibility to select different fields from the duplicate records, within Dynamics, using our powerful multi-merge interface.
Batch record processing once de-duplication rules have been validated and tested.	Quick and automated removal of duplicates resulting in reduced time and cost.
Schedule multiple batch processes.	A convenient and efficient way to regularly de-duplicate your database, at a time to suit you.
Build-your-own matching rules.	Develop your own rules using an easy-to-use interface designed around the “Advanced Find” interface, to cater for your exact requirements, and to enable single-click removal of duplicates.
Strong fuzzy logic matching.	Greater capture of duplicates including partially matching duplicates as well as giving the option to merge or skip multiple group entities.
Fast multiple record merging.	Based on predefined rules, you can merge any number of records of any entity with one click.
Easy integration into Microsoft Dynamic CRM.	Simple integration means minimum setup time and development costs. Downloadable from Microsoft AppSource, plus other download route for on-premise users.
Real-time advanced duplicate prevention on entry (merging of ‘ghost’ records).	Reduced requirement for de-dupe runs by preventing creation of multiple records before saving and without losing data entry, thus empowering every user of the CRM and improving engagement.
Address standardisation.	Addresses are formatted and validated automatically.
Phone number standardisation.	Customisable phone formatting based on preference (international or national formatting).
Deduplication/merge of custom entities.	Extends beyond the existing account/ contact/ lead/ case entities only.
“Remember this Record”.	Locate and merge two or more manually selected records to tidy up as you go.
Can be exposed to portals & web forms via API.	To enable automatic de-duplication at point of entry, giving a better UX to your customers. Powerful functionality via SDK.
Batch deduplication of a subset against a larger set.	Allows you to de-duplicate yesterday’s new entries against the rest of the database.

Demonstrations

The services can be demonstrated free of charge with no obligation to buyers so they can see the full functionality and benefits of the service and can ask any additional questions. This is normally delivered via an online meeting at agreed dates and times.

A demonstration can be arranged by the following methods.

- Telephone – 0151 355 4555
- Email – clientsuccess@data-8.co.uk
- By arranging via the request, a demo link on the Data8 website [Data8 - Book a Demo](#)

Free Service Trials

We offer free trials to all potential buyers as below:

- All functionality except for batch deduplication which is limited to 10% of the results

If on expiry of the 1-month period, there is the possibility that the trial may be extended by agreement between Data8 and the buyer.

A trial can be arranged in the following ways.

- Telephone – 0151 355 4555
- Email – clientsuccess@data-8.co.uk
- By arranging at the following link: [Data8 Duplicare - Microsoft Marketplace](#)

Service Documentation

We maintain live up to date documentation on our website, which is available to buyers at all times on Microsoft AppSource [Data8 Duplicare - Microsoft Marketplace](#)

Business Continuity and Disaster Recovery

Data8 have built a highly available solution following industry best practice for both disaster recovery and business continuity. We have replicated our data centres, having two independent data centres that are corporately and geographically diverse.

Our procedures are driven by our ISO27001 system. We have policies on change management, capacity management, and redundancy planning. We have fully documented and tested business continuity plans. All of these are continually reviewed and improved through the ISO27001 program.

Service Availability

Requests from clients are automatically load-balanced across all the active data centres. If a data centre is detected as failed, it will quickly be removed from the DNS entry for webservices.data-8.co.uk so that clients stop sending requests to it and traffic is routed to an alternative data centre. We maintain live access to our uptime through a web page - <https://status.data-8.co.uk/>

Technical Support

Technical support is provided free of charge by phone, email ticketing or live chat facility Monday to Friday between the hours of 09:00 and 17:30. Online meetings can be arranged.

Maintenance

All applications are run in a load-balanced environment, so servers can be removed from the pool for servicing and application of updates without any interruption to the service. This is done on a rolling basis so there is no impact on service availability through regular planned maintenance.

Where service will be impacted through some larger change, customers will be notified via email and the changes will be made outside of working hours, typically at weekends.

Operating system patches are applied monthly, while updates to our own services are done continually.

After Sales Support

All our clients benefit from a dedicated Account Management team; within the team, dedicated individuals are assigned to pro-actively manage the requirements of our clients. Additional members of the team are trained to provide the required cover during any holiday and sickness periods. Our Account Management team communicate effectively with our clients, and their responsibilities include but are not limited to the following:

- Management of all aspects of services level agreements
- Providing advice on the most efficient and cost-effective way to deliver client requirements
- Dealing with new requests that occur during a contract
- Dealing with any client queries
- Ensuring all financial aspects are dealt with accurately
- Keeping clients informed of the progress of all work that is being processed, providing progress reports where appropriate
- Acting as the first point of contact for issue resolution
- Actively obtaining all information from clients which is required to deliver work effectively

Training

We provide User Documentation and training by a combination of email, telephone and online meetings free of charge.

1 day of online training is included as part of our solution to assist Buyers in areas such as the building of rules for Deduplication and Merge.

Implementation and On-boarding

Step 1 - Assess

The services can also be demonstrated free of charge with no obligation to buyers so they can see the full functionality and benefits of the service and can ask any additional questions. This is normally delivered via an online meeting at agreed dates and times.

All Service Documentation is made available at the following link:

[Data8 Duplicare - Microsoft Marketplace](#)

We will provide any required assistance and advice regarding the most appropriate method of integration.

Step 2 – Integrate / Free Trial

The Service can be integrated in a free trial environment.

We will provide support free of charge throughout the trial period by email, telephone, live chat, technical helpdesk, or online meeting.

The free trial can be set up here:

[Data8 Duplicare - Microsoft Marketplace](#)

Alternatively, a solution file and the associated documentation can be provided to the buyer

Step 3 – Confirm

Confirm the number of users so that the cost can be confirmed.

Step 4 – Ordering and Invoice Process

There are several ways that our buyers can purchase our services as follows:

Order Confirmation Form

Buyers agree the exact detail for any services purchased, which we detail on a specific order form, which is sent to the buyer via email. Following acceptance of the order form, which is completed electronically, the services are immediately made live, and the invoice sent electronically.

Contract

A G-Cloud Call off Contract can be agreed, once this has been signed by both parties, the service will immediately be made available to the buyer.

Step 5 – Implementation

The licence is activated on confirmation of the order at the agreed commencement date.

Step 6 – On Boarding

The On-Boarding process following the licence activation includes the following steps

Configuration

- Data8 set up the licence.
- Basic De-duplication and Merge rules are pre-set.
- Online meeting with Data8 takes place to agree rule set-up.
- Ongoing support via phone, email and webinar takes place by the Data8 team.

Testing and Amendments

- Build the rules and run batch jobs and review matches.
- Test real-time prevention.
- Amend rule sets where necessary.

Implementation

- Release the functionality to users.

Off-Boarding

Off-boarding occurs automatically at the end of the contract period. At this point, the buyer will not be able to access the services. There is no additional charge for off-boarding, when the agreement expires, the service will cease to operate. Any buyer data is securely deleted, and the buyer will need to uninstall the service, full details of how to uninstall the service will be provided to the buyer.

Termination

The contract may be terminated in writing to expire no earlier than the Initial Term which is defined in the contract or Order Confirmation Form.

Alternative termination rights may be agreed with the buyer.

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