

Hitachi Solutions D365 Tools



Take your CRM to New Heights

You've spent precious time and resources researching and identifying the best cloud-based customer relationship management solution. And to maximize the value, you customized it to fit your unique business needs.

Do you really want all that effort to go to waste? Rapid Microsoft release cycles, slow user adoption, and changing business needs can all negatively affect the success of your customer engagement implementation:

- Complex development and add-ons can be time-consuming and costly, and delay project delivery
- Inefficient integrations and system access can create a negative experience that hinders user adoption and productivity
- Constant platform upgrades can wipe out customizations, causing system downtime and hours of manual re-building
- Complex code changes to update and enhance the system drain already tight IT resources and increase on-going administration costs

What is D365 Tools?

D365 Tools is an extensive library of pre-built plug-ins, controls, scripts, and dashboards that improves the Dynamics platform experience. Developed with our deep industry expertise, decades of experience, and thousands of successful Dynamics implementations, these subscription-based tools are proven to:



Improve user experience & drive adoption



Mitigate project risks



Accelerate development



Enhance scalability



Reduce delivery & administrative costs



Speed time to value

Subscribe to Continuous Benefits

From initial implementation and adoption to management and expansion, Hitachi Solutions D365 Tools provide ongoing value. When you subscribe, you get proactive support and assurance that the tools will always be current.

D365 Tools subscribers are guaranteed:

- **Automatic Microsoft D365 platform release compliance** — assure your system stays in sync with the latest Microsoft releases, alleviating the pain of re-creating system customizations
- **Increased user adoption** — leverage tools to enhance your solution, reducing clicks and improving user experience
- **Reduced technical debt** — as Microsoft's landscape changes, so do our tools. Not only do we maintain tools and ensure they are always compliant, but we also update our toolset continuously to ensure you have the right tools to solve your unique business challenges
- **Access to cutting-edge tools** — manage, enhance, and secure the system yourself without the need for costly development time or resources

What's in the D365 Toolbox?

This catalog of tools simplifies customization and helps accelerate development, reduces delivery and maintenance costs, and automates updates and upgrades:



Rules Engine

A no-code solution to help businesses easily and cost-effectively manage the thousands of complex business rules that make up a customized CRM system



Plug-In Library

A library of functionality extensions including Calculated Field Plug-in, URL Builder Plug-in, Auto-number Plug-in, Roll-up Plug-in, Email Attachment Stripper, Security Profiles, Data Parser, SCV Exporter, and Field Utilization Reporter



Effective Pivot

A specialized editable grid — with a flexible and friendly UI — that can be used for forecasting or other data entry based on grouped time periods



Package Manager

Self-service capabilities through a centralized location for viewing and accessing all Hitachi Solutions software installed directly within your CRM environment



Effective Grid

Quick and flexible data entry – easily edit rows of data directly from within a form or view in CRM, making data access, editing, and organization much more efficient



360° Tiles

Brings all relevant information associated with a given record into a single view, eliminating the need to hunt for information



Activity Notes

An advanced notes solution with rich text formatting that allows you to quickly tag multiple entities within D365 to an activity note



Household Visualization

A graphical representation of how contact records in D365 are interrelated, allowing you to quickly see the consolidated and individual wallet share of each household member



Multi-tag

The ability to tag multiple entities to any entity



One View Calendar

Quick and easy maintenance and monitoring of records through a calendar that can be configured to embed one or more D365 entities for a day, week, or month view



Personal Notes

Captures private and confidential notes on CRM contacts and companies



Relationship Hierarchy

Visual representation of the relationship of a given entity with other entities

Why Hitachi Solutions

We combine our deep industry expertise with decades of experience to provide high-value solutions that deliver a rapid return on investment. Our approach is designed to give you a faster, lower-risk implementation and rapid adoption through proven best practices.

- It starts with core technologies built on Microsoft Dynamics 365 so you can get up and running quickly
- We extend that with our own industry modules that give you capabilities tailored to the needs of your industry
- We deliver a customized solution to provide the best fit for your business, so you can focus on your unique strengths, not on basic technology

GET STARTED. REQUEST A CUSTOMIZED DEMO.

Are you looking to optimize your CRM user experience with D365 Tools? Contact us today to discuss your solution roadmap and see how you can re-invent your solution.



NA.Marketing@hitachisolutions.com



Call Us at 888.599.4332