

PRODUCT SHEET

Trillium Quality for Microsoft Dynamics 365

Data Quality Software for Microsoft Dynamics 365

Trillium Quality for Microsoft Dynamics 365 is a plug-in application that embeds advanced data quality processing seamlessly into your CRM system so you can create and maintain a single view of the customer that you can trust.

This application enables organizations to cleanse, match, evaluate, de-duplicate and merge customer data against a wide array of configurable and out-of-the-box quality rules.

Our solution offers the most comprehensive global data to validate and standardize customer names and addresses, and enriches and de-dupes all your customer data, whether it's manually entered by end users, imported from a new data source or already existing in the CRM database.

Validate New Data

Manage the quality of data imports.

- Analyze a lead data source against existing CRM instance.
- Review analysis results showing which leads are duplicates, potential duplicates or new.
- Select, confirm and import only lead data deemed acceptable

Validate Data As Its Entered

Control the quality of data at the point of user entry

- Pop-up validation of Address, Email, Phone.
- Match to existing Contacts and Leads with cross population of validated fields.
- Option to merge between Leads and Contacts.

Cleanse Existing Data

Solve problems from combining CRM systems.

- Fix problems you didn't know you had before they have an impact.
- Find issues that have been building for years.

"This data was siloed across 12 different applications. Inconsistencies in data formats and customer duplications were commonplace. Name and address misspellings, data in incorrect fields; each application had its own set of data quality problems built up over many years."

Raymond Aerts, Project Manager,
DELA Corporation



Real-Time Data Quality

Validate During Data Entry!

- Automatically applies validation, cleansing, standardization and matching logic to new data.
- Users are alerted to matches detected upon data entry (duplicates), across leads, contacts and accounts.
- Options to resolve issues are provided right in the interface – including merging data between leads and contacts.

Batch Data Quality

Validate Before Importing

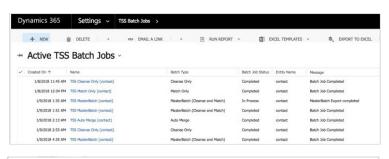
- Web-based Lead Analysis tool evaluates new data sources, such as trade show leads, for matches to existing records.
- Duplicates are flagged red, potential duplicates, yellow.
- Data administrators rapidly review, select and confirm only leads deemed acceptable.
- Also, validate, standardize, cleanse and match existing data in CRM

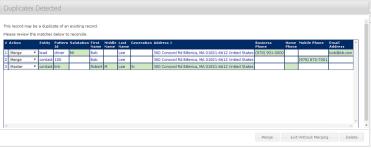
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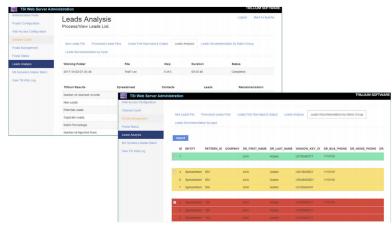
Works with Microsoft Dynamics 365 On-Premises Or In the Cloud

- Validate critical fields like account name, contact name and address. Check completeness, data placement, structure and accuracy against verified data libraries.
- **Verify** global addresses and locations against postal data sources. Optionally, use lookups, cross-reference tables, or third-party data.
- Standardize addresses to postal standards –automatically.
- Enrich phone and email data with additional optional add-on tool Trillium Precise. Enrich longitude and latitude with Trillium Global Locator.
- Match duplicate records identified by sophisticated matching algorithms and transitive logic. Runs out-of-the-box or customize and expand to include email, phone, etc.
- Merge matched records automatically with rules logic, or choose a single best record by selecting desired fields for a single version of lead, contact or account.

Maintain a single view of your customers







Optimize Your Data

Make better decisions!

- Data quality is provided exactly where and when it is needed most – in the CRM environment.
- Maximize the success of key initiaitves by increasing sales, and reducing churn.
- Advanced data quality processing and enrichment up and running in less than 30 days.

