

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

Microsoft
Partner



Gold Cloud Platform

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

Dynamics 365 Settings TSS Batch Jobs

NEW DELETE EMAIL A LINK RUN REPORT EXCEL TEMPLATES EXPORT TO EXCEL

Active TSS Batch Jobs

Created On	Name	Batch Type	Batch Job Status	Entity Name	Message
1/8/2018 11:45 AM	TSS Cleanse Only [contact]	Cleanse Only	Completed	contact	Batch Job Completed
1/8/2018 12:04 PM	TSS Match Only [contact]	Match Only	Completed	contact	Batch Job Completed
1/9/2018 1:35 AM	TSS MasterBatch [contact]	MasterBatch (Cleanse and Match)	In Progress	contact	MasterBatch Export completed
1/9/2018 1:51 AM	TSS MasterBatch [contact]	MasterBatch (Cleanse and Match)	Completed	contact	Batch Job Completed
1/9/2018 2:13 AM	TSS Auto Merge [contact]	Auto Merge	Completed	contact	Batch Job Completed
1/9/2018 2:53 AM	TSS Cleanse Only [contact]	Cleanse Only	Completed	contact	Batch Job Completed
1/9/2018 4:35 AM	TSS MasterBatch [contact]	MasterBatch (Cleanse and Match)	Completed	contact	Batch Job Completed

Duplicates Detected

This record may be a duplicate of an existing record.
Please review the matches below to reconcile.

# Action	Entity	Patterns	Salutation	First Name	Middle Name	Last Name	Generation	Address 1	Business Phone	Home Phone	Mobile Phone	Email Address
1 Merge	Lead	Entity	Mr	Bob		Lee		300 Concord Rd Billerica, MA 01821-6612 United States	(978) 872-7000			bob@bob.com
2 Merge	contact	100		Bob		Lee		300 Concord Rd Billerica, MA 01821-6612 United States			(978) 872-7001	
3 Master	contact	link		Robert	M	Lee	Dr	300 Concord Rd Billerica, MA 01821-6612 United States				

Merge Exit Without Merging Delete

TSI Web Server Administration

Leads Analysis Process/View Leads List.

Logout Back to Applet

New Leads File Processed Leads File Leads First Row Input & Output Leads Analysis Leads Recommendation by Match Group

Leads Recommendation by Input

Working Folder File Step Duration Status

MS Dynamics Master Batch 2017-05-02 07:40:46 Test7.csv 6 of 6 00:00:46 Completed

Trillium Results

Number of cleaned records

New Leads

Potential Leads

Duplicate Leads

Match Percentage

Number of reported files

TSI Web Server Administration

Leads Analysis

Logout

New Leads File Processed Leads File Leads First Row Input & Output Leads Analysis Leads Recommendation by Match Group

Leads Recommendation by Input

Report

ID	ENTRY	PATTERN_ID	COMPANY	DR_FIRST_NAME	DR_LAST_NAME	WINDOW_KEY_01	DR_BUS_PHONE	DR_HOME_PHONE	DR
1			Acme	Adams		US100AC011	1110100		
4	Spreadsheet	002	Acme	Adams		US100AC011	1110100		
6	Spreadsheet	002	Acme	Adams		US100AC011	1110100		
7	Spreadsheet	005	Acme	Adams		US100AC011	1110100		
8	Spreadsheet	005	Acme	Adams		US100AC011	1110100		
9	Spreadsheet	005	Acme	Adams		US100AC011	1110100		
10	Spreadsheet	005	Acme	Adams		US100AC011	1110100		

Trillium Quality for Microsoft Dynamics 365

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 initiatives by increasing sales, and reducing churn.
- Advanced data quality processing and enrichment **up and running in less than 30 days.**