

Hitachi Solutions D365 Tools



Overcoming Barriers of Success

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

What is D365 Tools?

D365 Tools is an extensive library of pre-built plug-ins, controls, scripts, and dashboards that streamline and automate common CRM scenarios. The ability to shortcut costly add-ons and complex integrations, automate platform and software releases, and simplify rule and code changes allows your Hitachi Solutions team to quickly deliver a higher-quality, lower-cost, flexible business solution tailored for your business needs and growth.

Forged from our deep industry expertise, decades of experience, and more than a thousand successful Dynamics implementations, these subscription-based tools are proven to:

- Accelerate development
- Reduce delivery & administrative costs
- Mitigate project risks
- Improve user experience & drive adoption
- Enhance scalability
- Speed time to value

What's in the D365 Toolbox?



D365 Success Tools

These advanced tools help cost-effectively manage and scale systems as business needs change:

- **My Contracts**
Helps manage contracts by automating the process of submitting executed and non-standard contracts — as well as RFPs — for compliance and legal approval
- **Rules Engine**
Offers a no-code solution to help businesses easily and cost-effectively manage the thousands of complex business rules that make up their CRM system

Subscribe for Continuous Benefits

From initial implementation and adoption to management and expansion, Hitachi Solutions D365 Tools provide value on an on-going basis. When you subscribe, you get proactive support and assurance that your tools will always be up-to-date. D365 Tools subscribers are guaranteed:

- **New functionality upgrades for your Hitachi Solutions industry cloud products** — allows you to effortlessly keep pace with technology while maximizing the value of your CRM investment
- **Automatic Microsoft D365 platform release compliance** — assures your system stays in sync with the latest Microsoft releases, cutting back the headache of re-creating your system customizations after a new release
- **5 hours of premium support** — ensures Hitachi Solutions products remain operational with each platform upgrade, decreasing on-going administrative costs and reducing downtime
- **Access to cutting-edge adoption and success tools** — helps you manage, enhance, and secure the system yourself without the need for costly development time or resources

D365 Essential Tools

This set of tools simplifies customization and helps accelerate development, reduce delivery and maintenance costs, and automate updates and upgrades:

- **JavaScript Library**
Provides over a hundred client-side scripts to handle everything from simple user interface enhancement to sophisticated data management and presentation
- **Plug-In Library**
Enables users to address common CRM scenarios without custom coding or the purchase of third-party apps — includes Calculated Field Plug-in, URL Builder Plug-in, Autonumber Plug-in, Roll-up Plug-in, Email Attachment Stripper, Security Profiles, Data Parser, SCV Exporter, and Field Utilization Reporter
- **Effective Grid**
Enables quick and flexible data entry — users can easily edit rows of data directly from within a form or view in CRM, making data access, editing, and organization much more efficient
- **Effective Pivot**
A specialized editable grid used for forecasting or other data entry based on grouped time period
- **Integration Framework**
Provides a simple editable grid interface for creating mappings to external system data, supporting two-way data integration
- **Package Manager**
Offers self-service capabilities through a centralized location for viewing and accessing all Hitachi Solutions software installed directly from within the CRM environment — speeding and simplifying downloading documentation and updating products

D365 Adoption Tools

These tools help streamline the overall user experience and increase adoption and productivity:

- **360° Tiles**
Allows users to bring all relevant information associated with a given record into a single view, eliminating the need to hunt for information
- **Activity Notes**
Offers an advanced notes solution with rich text formatting that allows the user to quickly tag multiple entities within D365 to an activity note
- **Household Visualization**
Provides a graphical understanding of how contact records in D365 are related to each other, and allows you to quickly see the consolidated and individual wallet share of each household member
- **Multi-tag**
Enables the ability to tag multiple entities to any entity
- **One View Calendar**
Allows quick and easy maintenance and monitoring of records through a calendar that can be configured to embed one or more D365 entities on a day, week, or month view
- **Personal Notes**
Provides the ability to capture private and confidential notes on CRM contacts and companies
- **Relationship Hierarchy**
Allows users to visualize the relationship of a given entity with different entities

GET STARTED. REQUEST A CUSTOMIZED DEMO.

Interested in learning more about Hitachi Solutions D365 Tools? Get a customized demo to see how you can re-invent your business solutions.



NA.Marketing@hitachisolutions.com



Call Us at 888.599.4332