

# 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](mailto:NA.Marketing@hitachisolutions.com)



Call Us at 888.599.4332