Overcoming Barriers to 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.

Do you really want all that effort to go to waste? Rapid Microsoft release cycles, slow user adoption, and a growing business 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
- Requiring complex code changes to update and enhance the system drains already tight IT resources and increases on-going administration costs

So how do you feel secure about your investment while affordably implementing and managing your customer engagement system? Hitachi Solutions D365 Tools.
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

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
What’s in the D365 Tool Box?

### 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

- **Dynamic Grouping Table**
  Provides a customizable grid that allows you to group different entity records (such as parent and child) and embed pivot-like tables within your D365 forms

- **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

- **Solution Explorer**
  Provides detailed information about your customizations from right within the D365 environment. The helpful tool includes robust reporting, ignores out-of-box metadata, identifies third-party solutions, and suggests best practices

- **Embed Lists in Emails**
  Allows you to select which lists can be embedded in your emails from within D365

- **Post-to-email Generator**
  Bridges the gap between D365 and Exchange by automatically generating an email when you make a post in D365 – making it easy and effortless to keep everyone up to date

### 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

- **Agent Desktop**
  Consolidates service apps and tools into one desktop, giving call center agents a single place where they can view customer information, access applications, and capture customer interactions – allowing them to deliver better and faster customer service

- **Enterprise Calendar**
  Allows meetings, calls, and events created in D365 to automatically sync with your Exchange calendar – you don’t have to leave the D365 system

- **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**
  Shows all entity records by creation date within a single view, allowing you to easily maintain and monitor entity records

- **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
D365 Success Tools
These advanced tools help cost-effectively manage and scale systems as business needs change:

→ Hitachi Solutions GIS
Hitachi Solutions Geographical Information System (GIS) provides an open and scalable platform to visualize working data on maps, giving you real-time location-based insights that help proactively anticipate customer needs and deliver personalized, appropriately priced products and services

→ 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

→ STAKE
Security by Trace Auditing, Key Management & Encryption (STAKE) provides an affordable, risk-free way to augment existing D365 data security capabilities with military grade encryption, zero-knowledge key management, and trace audit logging

Get Started. Request a Customized Demo.
Contact your local Hitachi Solutions representative for more information about how we can help you quickly deliver customer engagement that’s customized to your business strengths and stays up-to-date with each new release of Microsoft Dynamics 365.

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Call Us at 888.599.4332

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

1. It starts with core technologies built on Microsoft Dynamics 365 so you can get up and running quickly

2. We extend that with our own industry modules that give you capabilities tailored to the needs of your industry

3. Finally, 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