



Validity Announces GridBuddy Cloud for Microsoft Dynamics 365, Unifying CRM Data to Help Improve Productivity

Platform aggregates data from multiple tables and Dynamics 365 environments into one easily editable grid view

MARCH 3, 2021 – AUSTRALIA – Validity, a leading provider of customer data quality and marketing analytics software, announced today its new GridBuddy Cloud for Microsoft Dynamics 365. GridBuddy Cloud makes it faster and more intuitive for users to update and navigate data in Dynamics 365 by placing fields from multiple tables, and even multiple CRM environments, into one editable Excel-style workspace.

For fast-paced Dynamics 365 users who rely on CRM information that is often scattered across multiple tables or multiple environments, GridBuddy Cloud is the user experience they've been missing. With GridBuddy Cloud for Dynamics 365, they no longer need to open multiple browser tabs to access account, contact, and opportunity information all at once. Instead, they can use a pre-configured or custom grid to view only the fields they want from all the tables they need in one editable view. With this new capability, GridBuddy Cloud is changing how users interact with their data, resulting in a substantial increase in both productivity and data quality.

"Since we introduced Validity's GridBuddy Cloud offering, our goal has always been to give companies with multiple CRMs the ability to work with their data sources in one actionable, editable place," said Mark Briggs, chairman and CEO of Validity. "Today's announcement with Microsoft Dynamics 365 is one of many we hope to bring into the GridBuddy Cloud platform to make the lives of our customers easier, while ending the need for multi-CRM users to toggle back and forth between screens."

With this new platform, companies enable users to quickly capture information from customer interactions, expedite their day-to-day responsibilities, and fuel their CRM with accurate and timely data. For businesses relying on Dynamics 365, GridBuddy Cloud simplifies the navigation of Dynamics 365 data with a more intuitive user experience, making it easier to connect with and serve customers while providing critical data needed for strategic planning.

Here's how:

1. Grids for Sales

Opportunity Management. Keep opportunities and forecasts up to date with a grid showing fields from open opportunities like status, revenue, and closed date alongside its related point of contact's email and phone details in one, editable view.

Lead Management. Get immediate insight into Leads and how they relate to existing Accounts and Contacts through grids that surface data with commonalities, like the same account name or website, to uncover valuable information before sales follow-up.

2. Grids for Service

Case Management. Ensure customer service requests are managed efficiently and consistently by bringing case details like description, follow-up-by date, and the customer's preferred contact method into a Customer Success role-based view.

3. Grids for All

Account Management. Understand client engagement at key accounts with a grid that surfaces their related Opportunities, Contacts, and Activities in one view.

Contact Management. Prioritise customer and prospect relationships by tracking follow-up activities in a grid that also provides access to their contact details, making each task actionable from one screen.

4. Custom Grids

Custom Grids for any Table. Manage various ad hoc processes with grids showing only the fields users want from all the tables companies need, in one actionable view.

Validity's GridBuddy Cloud for Microsoft Dynamics 365 is available immediately.

About Validity

For over 20 years, tens of thousands of organisations throughout the world have relied on Validity solutions to target, contact, engage, and keep customers – using trustworthy data as a key advantage. Validity's flagship products – DemandTools, BriteVerify, Trust Assessments, Everest, and GridBuddy – are all highly rated solutions for CRM data management, email address verification, inbox deliverability and avoiding the spam folder, and grid CRM applications. These solutions deliver smarter campaigns, more qualified leads, more productive sales, and ultimately faster growth. For more information, visit Validity.com and connect with us on LinkedIn, Instagram, and Twitter.

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