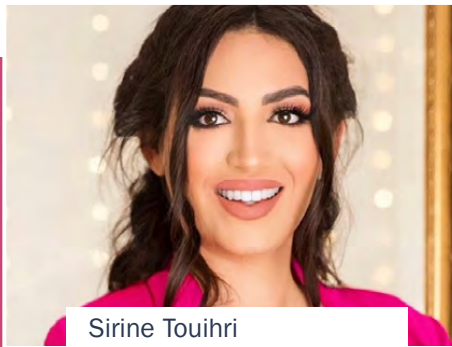
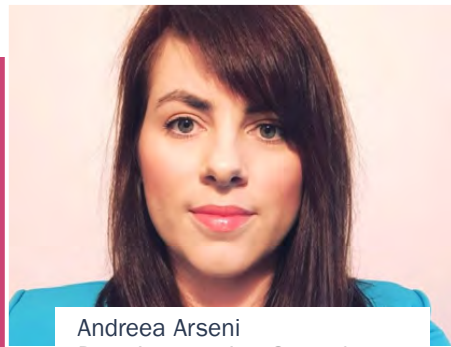


WEBINAR MAXIMIZING BUSINESS SYNERGY:

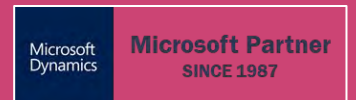
Salesforce and Microsoft Dynamics 365 Integration



Sirine Touihri
Sales Consultant



Andreea Arseni
Data Integration Consultant



AGENDA

- Introduction to RAPIDI
- Importance of Integration
- RAPIDI Integration Solutions
- Customer Testimonials
- How to get started with us?
- Q&A



RAPIDI COMPANY *Profile*



Data integration *experts*

+ 30 years of data integration

Salesforce and Microsoft

Worldwide coverage

Flexible, simple and robust complete *solution*

Cutting edge cloud
technology

No programming

Five star AppExchange rating

Going the *extra mile* for our customers

Outstanding support

Great customer references

Flexible to match your needs

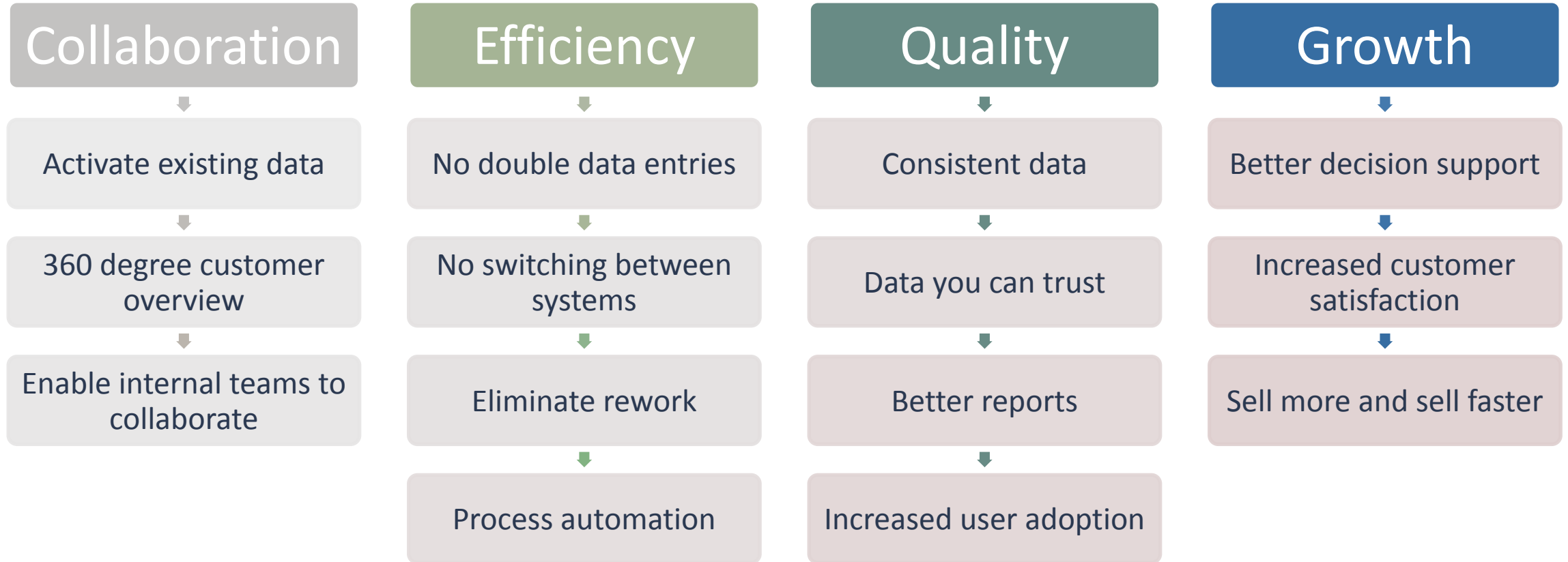


IMPORTANCE OF INTEGRATION

All about simplifying the integration process

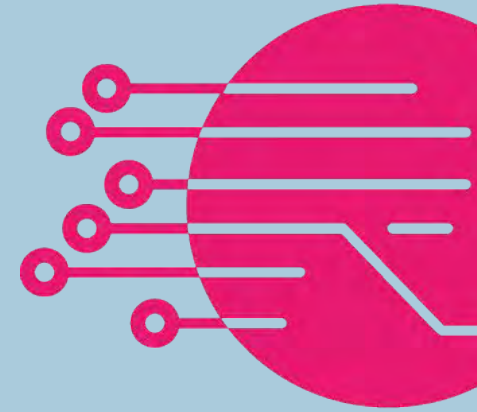


WHY *integrate*?



WHY is integration important?

- It streamlines business processes
- It offers real-time data synchronization
- It improves decision-making and productivity
- It reduces or eliminates data silos, manual processes, and communication gaps



“

**Integrate to elevate: Unify
your systems, amplify your
success.**

”

RAPIDI DATA INTEGRATION SOLUTIONS

Data Integration Made Easy

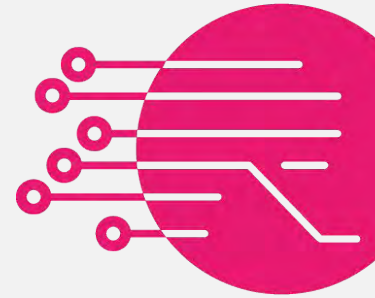































RAPIDI *Data Integration Solutions*

- Rapidi Data Integration Solution is an innovative iPaaS that is three-fold in its simplicity; in design, installation and use.
- It is a cloud integration system that comes out of the box with pre-configured templates allowing you to quickly integrate various systems.
- We have extensive expertise in integrating Microsoft Dynamics ERPs, Salesforce and more!



RAPIDI's *most common end-points*



 Salesforce.com	 Microsoft Dynamics 365	 Hubspot CRM	 Shopify E-commerce	 Google Big Query	 Storyblok		
 Microsoft Dynamics 365 Business Central	 Microsoft Dynamics 365 Finance	 Microsoft Dynamics 365 Sales	 Microsoft Dynamics 365 Supply Chain Management	 REST Web Services	 OData	 Microsoft SQL Server	
 Microsoft Dynamics NAV	 Microsoft Dynamics CRM	 Microsoft Dynamics AX	 Microsoft Dynamics GP	 IBM DB/2 on iSeries	 ODBC	 Sybase SQL Anywhere	 Lotus Notes
 Microsoft Dynamics 365 Finance and Operations	 Microsoft Dynamics C5	 MySQL	 Oracle	 Joomla	 NetSuite	 Syspro	 SQLite



**iPaaS with no
staging of your
data**

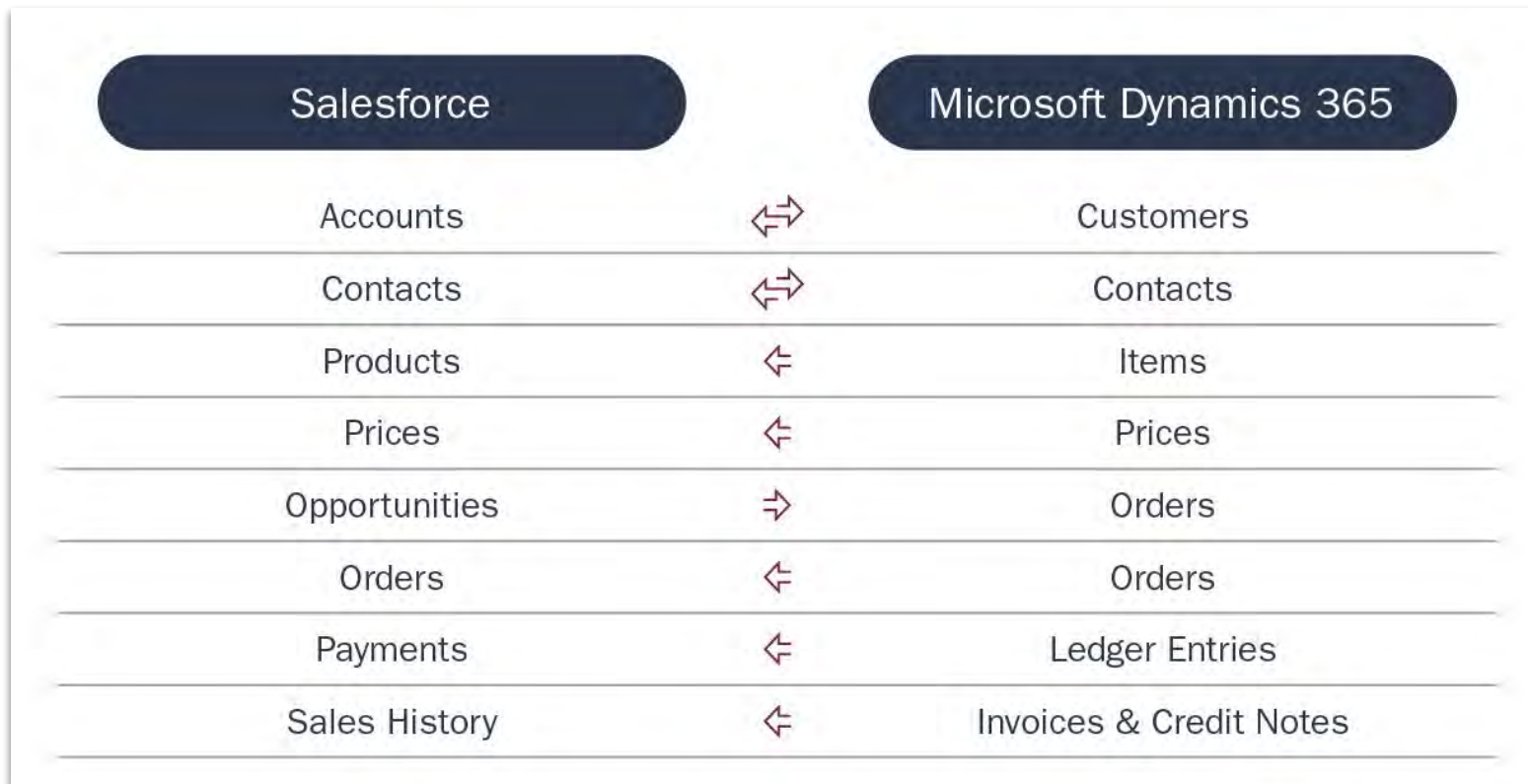
**Easy to set up
No programming
required**

**Connect multiple
systems and
companies**

**Any data
Standard,
custom, apps**

**“All inclusive”
subscriptions
and services**

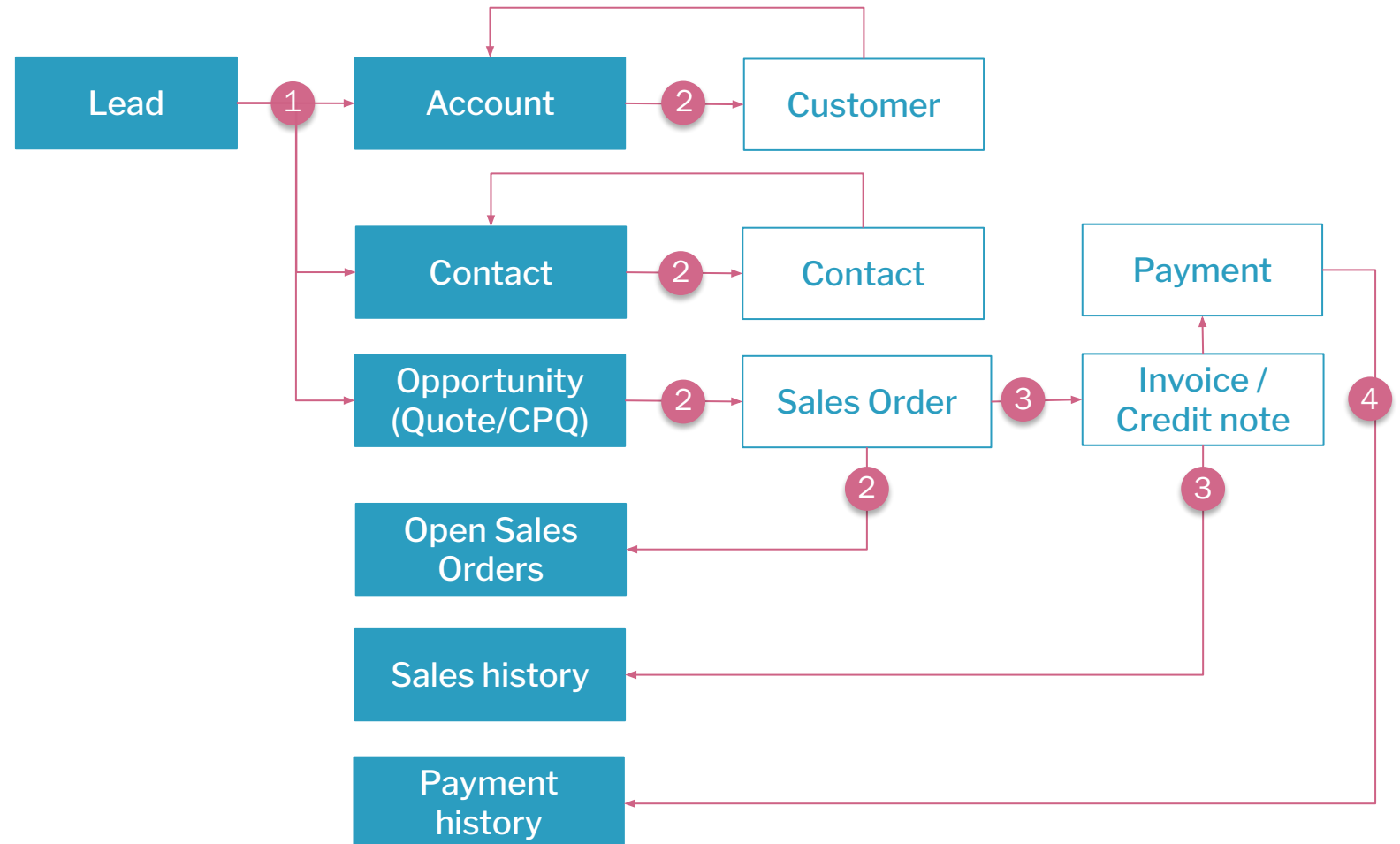
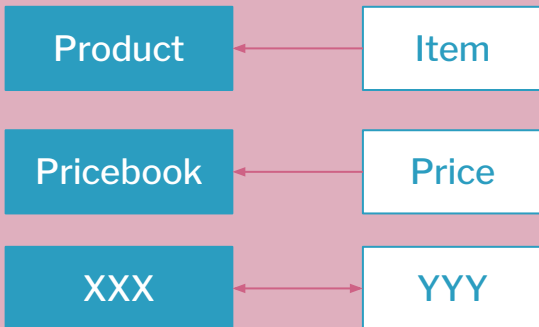
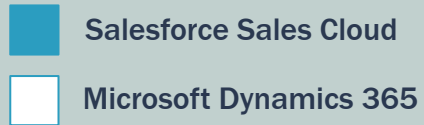
DATA FLOWS *Salesforce - Microsoft Dynamics 365*



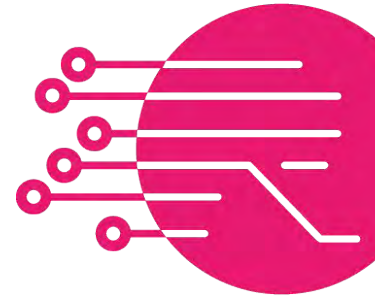
QUOTE TO CASH *Example*

STEPS

1. Lead is converted
2. Quote is accepted
3. Order is invoiced
4. Invoice is paid



RAPIDI's *Key Functionalities*



Data Mapping and Transformation

Real-Time Synchronization

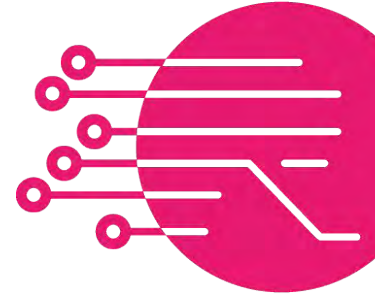
Customization and Scalability

Automated Workflows

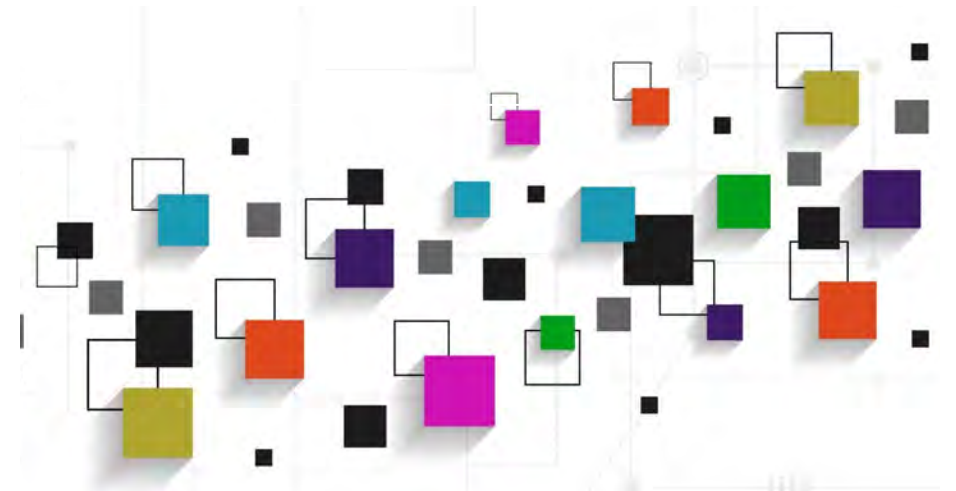
Security Measures

Monitoring and Analytics

DATA MAPPING & TRANSFORMATION

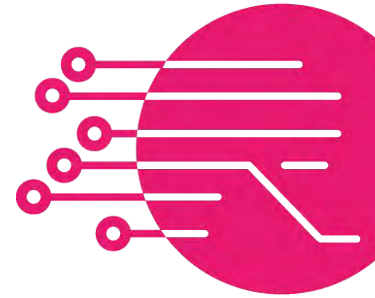


- Ability to map and transform data effortlessly between Microsoft Dynamics ERPs and Salesforce via our pre-built mapping templates;
- Support for custom data fields, ensuring flexibility for various business needs;
- RAPIDI offers an intuitive data mapping interface that allows you to customize your current data flows.



REAL-TIME

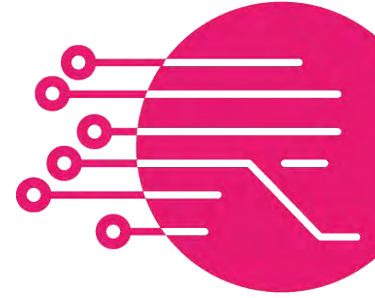
Synchronization



- It ensures that the information is always up-to-date in both Microsoft Dynamics ERPs and Salesforce.
- Immediate updates on leads, opportunities, and customer interactions for sales teams.
- Minimization of data latency and improved decision-making.



CUSTOMIZATION & SCALABILITY

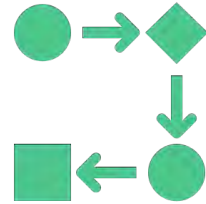


- RAPIDI can adapt to unique business processes and structures;
- It ensures scalability for businesses of all sizes - from small enterprises to large corporations;
- It provides customization based on industry-specific needs.

AUTOMATED WORKFLOW



RAPIDI's automated workflows streamline business processes.



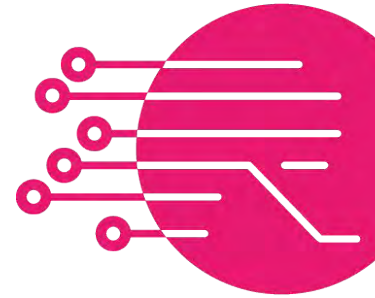
Repetitive tasks are automated, reducing manual effort and minimizing errors;



The flexibility to customize data flows to match specific business requirements.



SECURITY MEASURES



- RAPIDI is committed to data security and compliance (encryption protocols, access controls, and other security features).
- We provide confidence to decision-makers about the safety of sensitive business data.

MONITORING & ANALYTICS

- RAPIDI offers monitoring and analytics tools for tracking integration performance
- Businesses can gain insights into data flows, identify bottlenecks, and optimize processes via our statistics

A sneak peek into other RAPIDI *functionalities*



DATA FLOW ACTIONS

Supported data flow actions that can be enabled and performed within RAPIDI. You can enable one action or a combination of 2 or more.





- Enabled
- Update
- Add
- Delete
- Actions
- Move
- Delete All
- Autogenerate Key
- Disable Dest Lookup
- All Fields
- Continue on Error

CUST_DK Customer DK SFDC Account Id

Link Storage Values

Search in Customer DK Search in SFDC Account Id

New Link Storage Value Delete All Browse No file chosen Import JSON Export JSON

CUSTOMER DK	SFDC ACCOUNT ID	ACTION
30000	0017R00002z4gAmQAI	 
40000	0017R00002z4gB1QAI	 

LINK STORAGES

Dynamic lookup tables that can store your company data within Rapid. At runtime, all records are added to the Link Storage tables.

ACTIONS	CONN	COMP	CURR	COMPNAME	LSCUST	LSINV	DESCRIPTION
	NAVODATA001	CRONUS_DK	EUR	BC DK Company	CUST_DK	INVOICE	DK Demo
	NAVODATA002	CRONUS_UK	GBP	BC UK Company	CUST_UK	INVOICE	UK Demo

CUSTOMER -> SF... NAVODAT... SFORCE001

Runs Log Edit Delete Browse Table Layout CUST01_SF_ADD_UPD Copy

Activate Changes

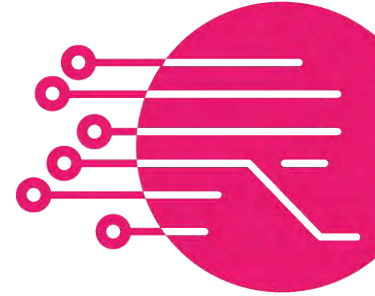
Run Transfer

- ✓ no tags
- COMPANY - NAVODATA001: DK Demo
- COMPANY - NAVODATA002: Uk Demo

TAGS

Parameters or variables that can be set up at the connection or data flow level for different purposes such as: transfer data to several different destinations via a master data flow.

RAPIDI *in a nutshell*



- RAPIDI offers Microsoft ERP – Salesforce integrations but its offering integrations services also include integrations between Microsoft Dynamics products (e.g Business Central to Microsoft Sales)
- Cost-effective, scalable business model
- Data Integration via RAPIDI is possible for both cloud and on-premise systems
- Robust development tools
- Prebuilt mapping templates – ready to be used at any time
- Approachable for non-IT users – no development required or technical skills
- Manageable without IT resources post GO-LIVE

ALL INCLUSIVE

1 | Integration platform



- Integration configuration
- Advanced data toolbox
- Log and notifications
- Monitoring
- RapidConnector

2 | Integration templates



- Complete business processes
- Pre-configured
- Best practices
- Customizable
- Documentation

3 | Support



- Maintain integration
- Add fields to existing transfers
- Integration advisory
- Resolve data errors
- Included in subscription

Investment

One-time implementation fee +
Yearly subscription





CUSTOMER *Testimonials*



HAPPY CUSTOMERS



4,9

Average rating on
Salesforce AppExchange

“Rapidi really provides a wonderful solution and has the best customer service ever. I would definitely recommend this company. Love it!”

Lily Chan,
Diamond Wipes International



4,8

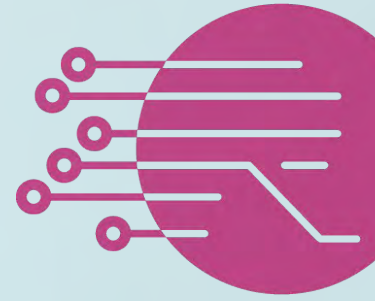
Average Support rating the
past 5 years

Any Industry

Any geography



Educate 360 *Case Story*



*I would absolutely recommend Rapidi.
I could not imagine our business without Rapidi.
The system is very reliable and flexible. Rapidi
makes live as an IT person so much easier.*



ABOUT *Educate 360*

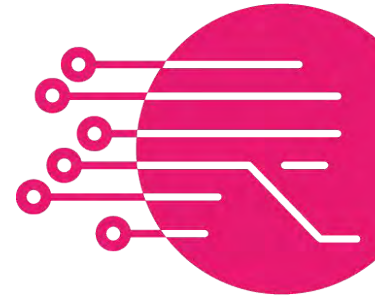
Educate 360 offers **integrated learning and development solutions** in Management & Leadership, Data Science and IT.

It is a trusted industry leader with a long history, including the acquisition of several brands like Project Management Academy (established in 2009).

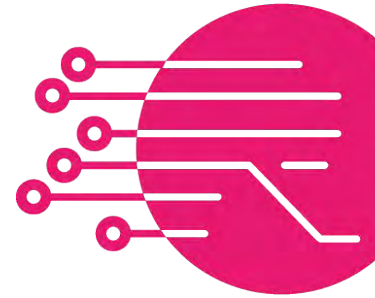
Its mission is to empower individuals and organizations with skills for success in a technology-driven, innovative economy.

Educate provides **flexible training programs** for all levels, from C-suite to entry-level and offers training in Private Group Training and on-demand training via a Learning Management System.

It specialises in **certification preparations**, business analysis, and skill-based training with the goal to enhance organizational efficiency, alignment, and business outcomes.



CHALLENGES *before Rapidi*



Rapidi is the way to go - It is the most cost-effective solution on the market - and it just works!

Acquisition and System Disparity:

- Educate 360 acquired several brands
- These brands operated on different customer management systems, including a homegrown system.

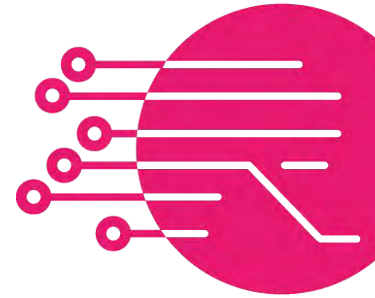
Integration Issues with Microsoft Business Central:

- The Accounting Department used Microsoft Dynamics 365 Business Central, necessitating integration.
- Custom-built APIs for integration with Microsoft Business Central posed significant challenges.

Need for Improved Integration Solutions:

- Existing solutions failed to meet needs due to the highly customized setup and high transaction volume.
- There was a need to explore alternative integration service platforms to find a viable solution.
- Need for Microsoft Dynamics 365 Sales Integration, as Educate 360 acquired another company that uses Microsoft Dynamics 365 Sales as their CRM.

IMPLEMENTATION *& Impact*

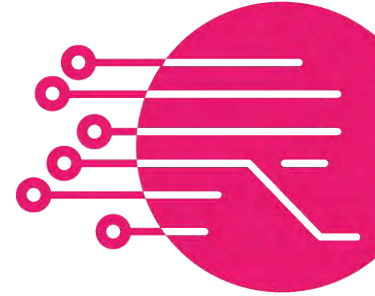


Automating our processes with Rapidi has not only improved our operational efficiency but also ensured data integrity and accuracy across our systems. This was a major leap forward for us.

- Transformed operational capabilities
- Supported by Rapidi's expert team for customization
- Streamlined data flow and automated processes
- Reduced manual workloads and enhanced operational efficiency
- Impact of successful integration:
 - Better management of orders, customer information, and product data
 - Opportunities for growth by incorporating new brands and offerings seamlessly



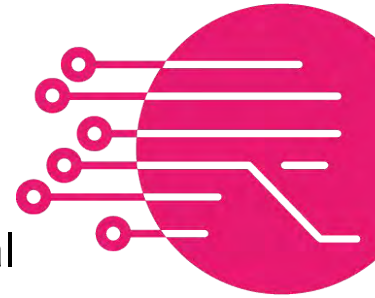
ACHIEVEMENTS & Benefits



- **Enhanced Operational Capabilities:** Transformation of operational processes.
- **Expert Support:** Customization aided by Rapidi's expert team.
- **Streamlined Data Flow:** Improved data flow and automated processes.
- **Increased Efficiency:** Reduction in manual workloads and enhanced operational efficiency.
- **Data Accuracy and Integrity:** Real-time synchronization ensured consistent and up-to-date data.
- **Operational Scalability:** Scalable solution for adding new brands and services, facilitating growth.
- **Improved Management:** Better handling of orders, customer information, and product data.
- **Growth Opportunities:** Seamless incorporation of new brands and offerings, facilitating expansion.
- **Increased Operational Agility:** Flexibility for adapting to business changes and integrating new processes.
- **Reduced Dependency on Manual Processes:** Automation minimized reliance on manual interventions.
- **Better Decision Making:** Real-time data access supported improved decision-making.
- **Future Growth Support:** Laid groundwork for integration of additional systems like Dynamics 365 Sales and HubSpot without complex programming.

The peace of mind Rapidi brings, knowing our data integration runs smoothly in the background, allows us to focus on our core mission of providing quality education. It's an essential part of our IT strategy.

ACHIEVEMENTS & *Benefits*



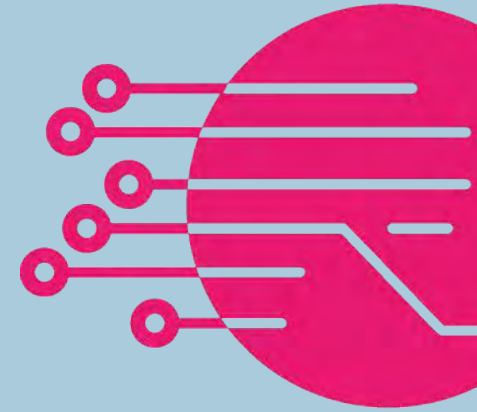
Achievements with Rapidi Integration:

- **Enhanced Operational Capabilities:** Transformation of operational processes.
- **Expert Support:** Customization aided by Rapidi's expert team.
- **Streamlined Data Flow:** Improved data flow and automated processes.
- **Increased Efficiency:** Reduction in manual workloads and enhancement of operational efficiency.

Benefits of Successful Integration:

- **Improved Management:** Better handling of orders, customer information, and product data.
- **Growth Opportunities:** Seamless incorporation of new brands and offerings, facilitating expansion.

The peace of mind Rapidi brings, knowing our data integration runs smoothly in the background, allows us to focus on our core mission of providing quality education. It's an essential part of our IT strategy.



“

I highly recommend Rapidi to anyone facing integration challenges. Its performance, reliability, and support have been outstanding. Rapidi isn't just a tool; it's a partner in our growth.

Kevin Gilmore, Director of Information Technology at Educate 360

”



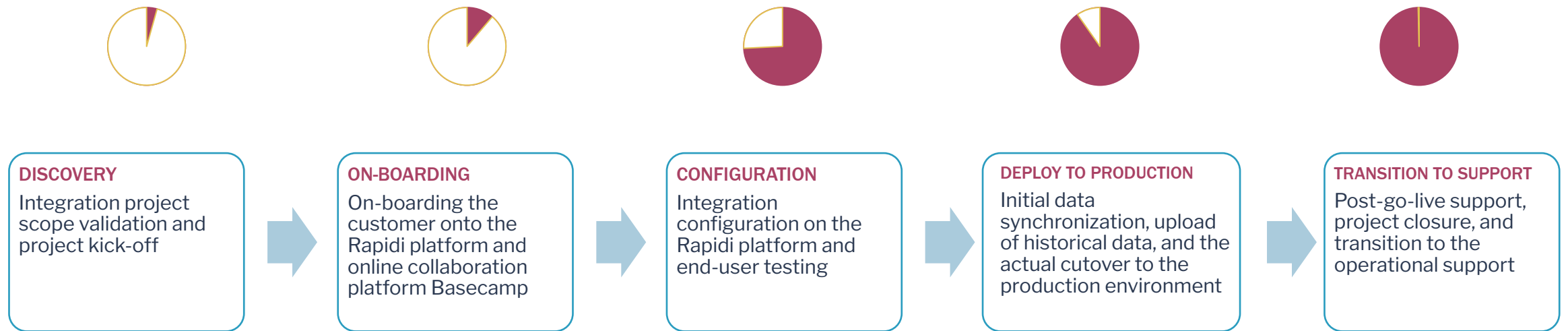
How to get started with us?

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www.rapidionline.com
MyRapidi.com/wiki

RAPIDI *Implementation* PROCESS





QUESTIONS ?

Follow &
Connect



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MyRapidi.com/wiki



When shall we start our integration when considering to upgrade from NAV to BC?



What would the process be if I decide to change my CRM?



How to set up your data integration project in 3 steps?



How do we deal with the integration if we have plans to roll it out to other countries ?



Why should we choose Rapidi integration platform instead of building integration by ourselves?



How to ensure the best data mapping?



Why should we choose Rapidi integration platform instead of using other standard integration tools?



Why it's best to be prepared when handling errors?



Which systems does Rapidi support?



Do you support custom objects?

FOR MORE INFO *visit www.rapidionline.com*
CONTACT US *via www.rapidionline.com/contact-us*



**Solution
overviews**



**Case stories
and fact sheets**



**Documentation on
MyRapid.com/wiki**



SIMPLE

With a standard subscription
you can create new integrations yourself



FAST

Rapidi can be
implemented as standard in just a few
days



ROBUST

No programming and
proven best practice configurations



FLEXIBLE

Any transfer can be in
any direction or bi-directional



Please give us feedback

<https://www.getfeedback.com/r/B18KMiaV>

Follow &
Connect

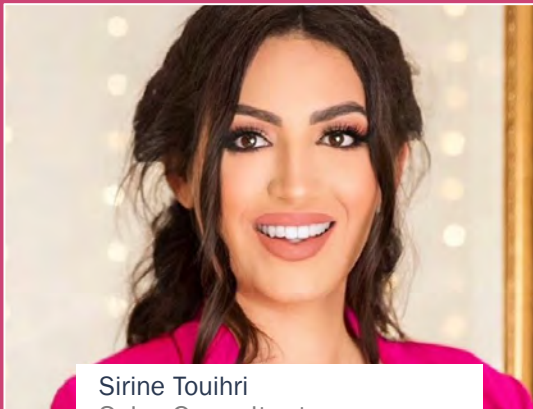


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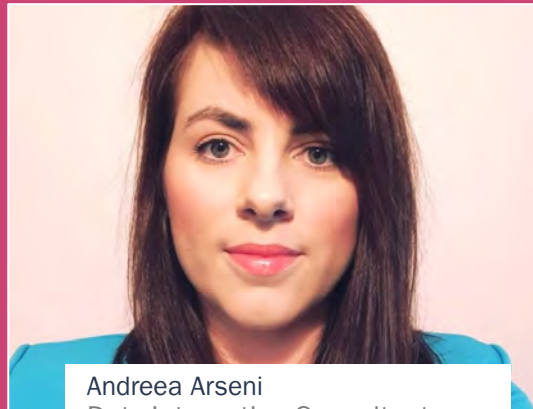


THANK YOU!

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