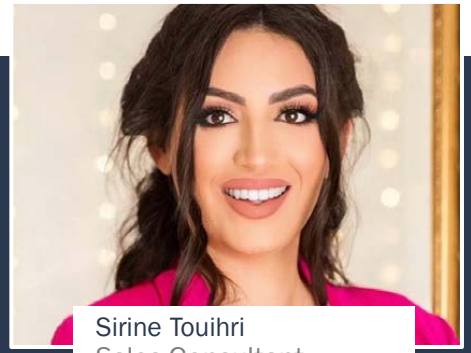
RAPIDI
DATA INTEGRATION MADE EASY

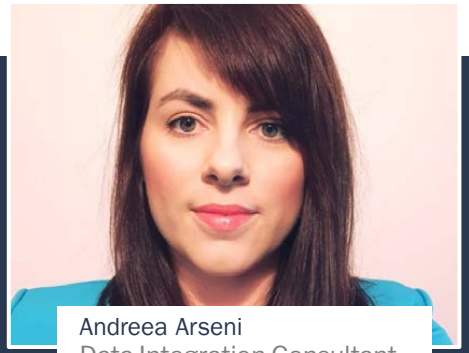
WEBINAR

# MAXIMIZING BUSINESS SYNERGY:

## *Salesforce and Microsoft Dynamics 365 Integration*

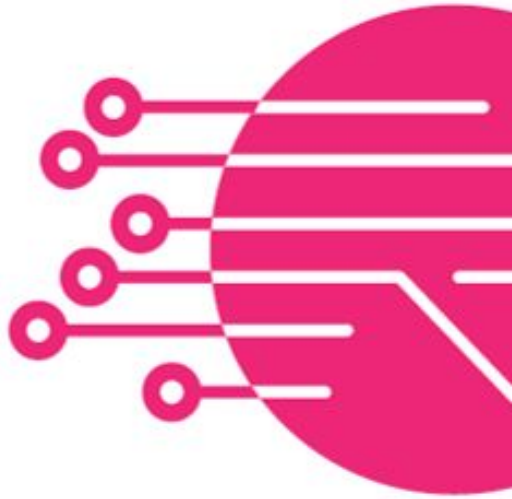


Sirine Touihri
Sales Consultant



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

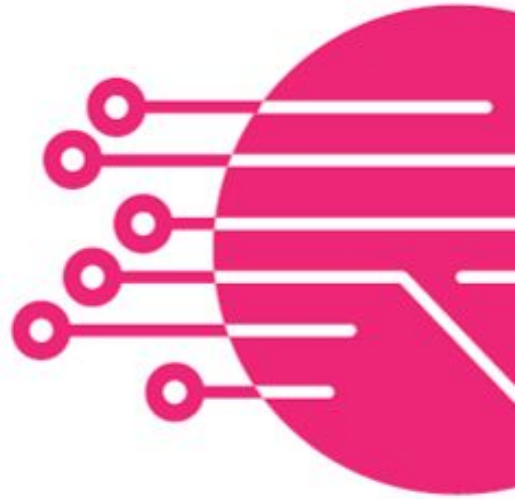
EMEA

APAC

AMERICAS

# IMPORTANCE OF INTEGRATION

*All about simplifying the integration process*



# WHY *integrate?*

## Collaboration

- Activate existing data
- 360 degree customer overview
- Enable internal teams to collaborate

## Efficiency

- No double data entries
- No switching between systems
- Eliminate rework
- Process automation

## Quality

- Consistent data
- Data you can trust
- Better reports
- Increased user adoption

## Growth

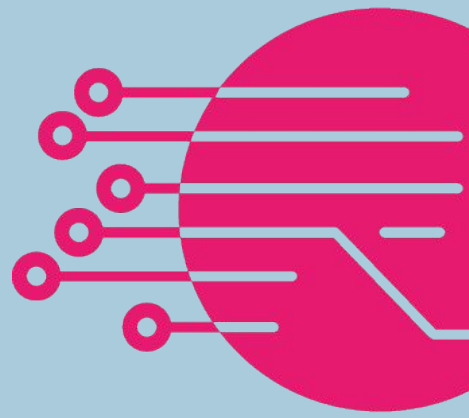
- Better decision support
- Increased customer satisfaction
- Sell more and sell faster

RAPIDI

# **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

RAPIDI

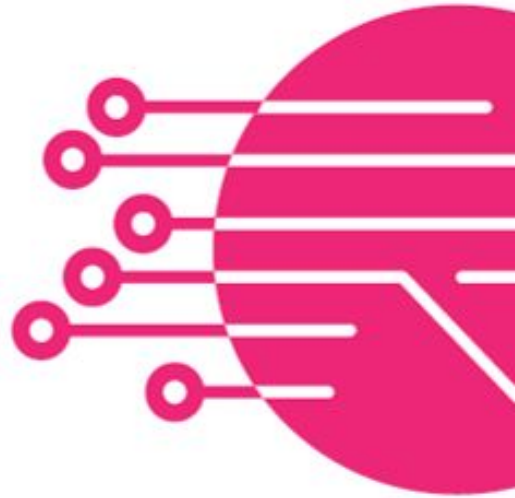


**Integrate to elevate: Unify your systems, amplify your success.**

# RAPIDI DATA INTEGRATION SOLUTIONS

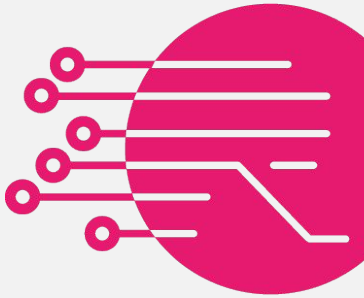
*Data Integration Made Easy*

# 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

Microsoft Dynamics 365 Business Central

Microsoft Dynamics 365 Finance

Microsoft Dynamics 365 Sales

Microsoft Dynamics 365 Supply Chain Management

Microsoft Dynamics NAV

Microsoft Dynamics CRM

Microsoft Dynamics AX

Microsoft Dynamics GP

Microsoft Dynamics 365 for Finance and Operations

Microsoft Dynamics C5

MySQL

Oracle

REST Web Services

OData

Microsoft SQL Server

IBM DB/2 on iSeries

OBDC

Sybase SQL Anywhere

Lotus Notes

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*

| Salesforce | | Microsoft Dynamics 365 |
|---|---|---|
| Accounts | ⇄ | Customers |
| Contacts | ⇄ | Contacts |
| Products | ⇐ | Products |
| Prices | ⇐ | Prices |
| Opportunities | ⇒ | Orders |
| Orders | ⇐ | Orders |
| Payments | ⇐ | Ledger Entries |
| Sales History | ⇐ | Invoices & Credit Notes |

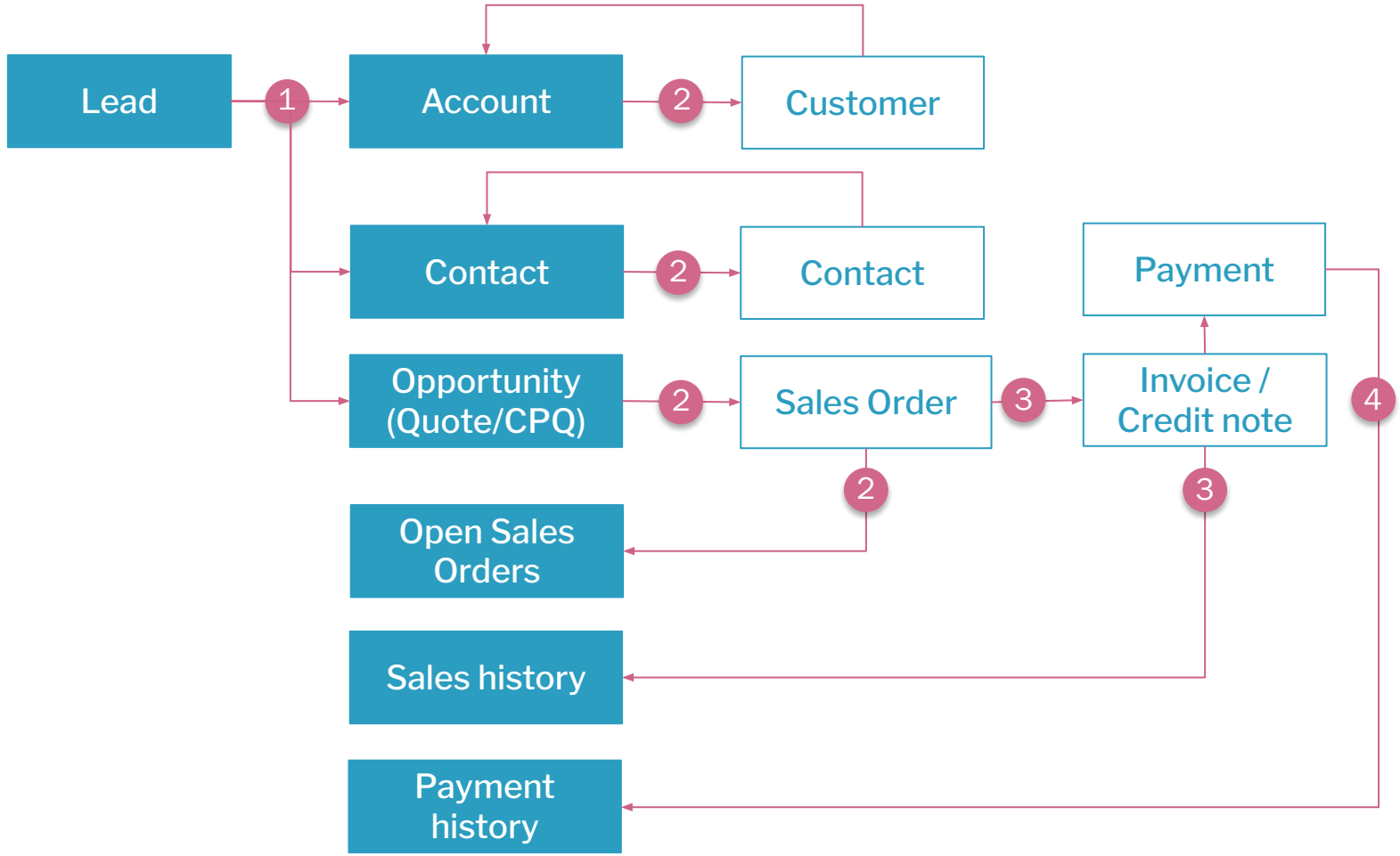
# QUOTE TO CASH *Example*

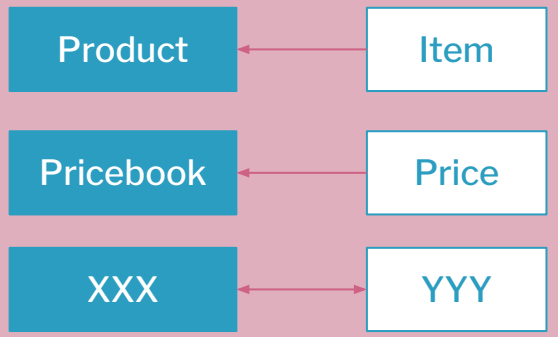
## STEPS

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

Salesforce Sales Cloud

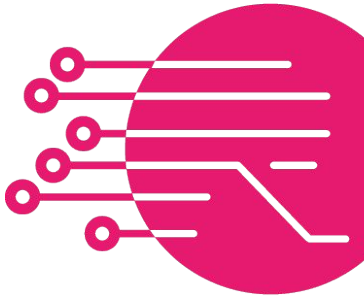
Microsoft Dynamics 365




RAPIDI

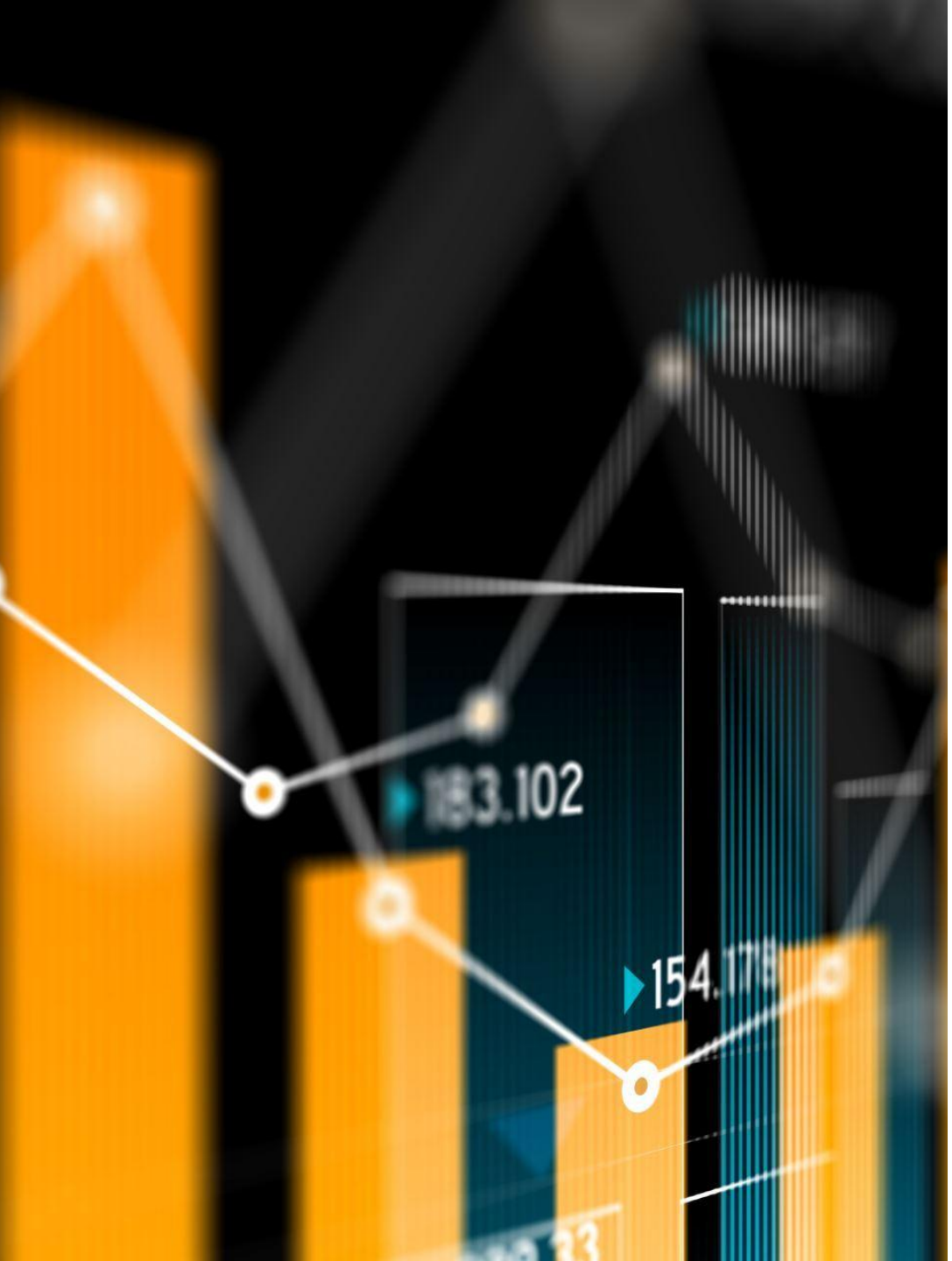
# RAPIDI's *Key Functionalities*



- 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

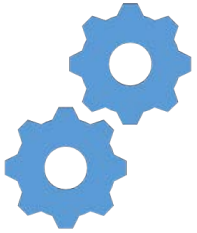
## *Synchronization*

- 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.

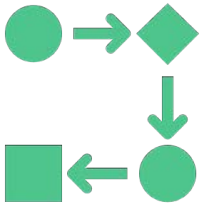
# CUSTOMIZATION & SCALABILITY

- 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.

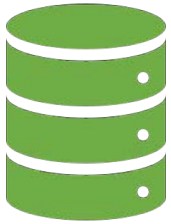
# AUTOMATED WORKFLOW



RAPIDI's automated workflows streamline business processes.



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



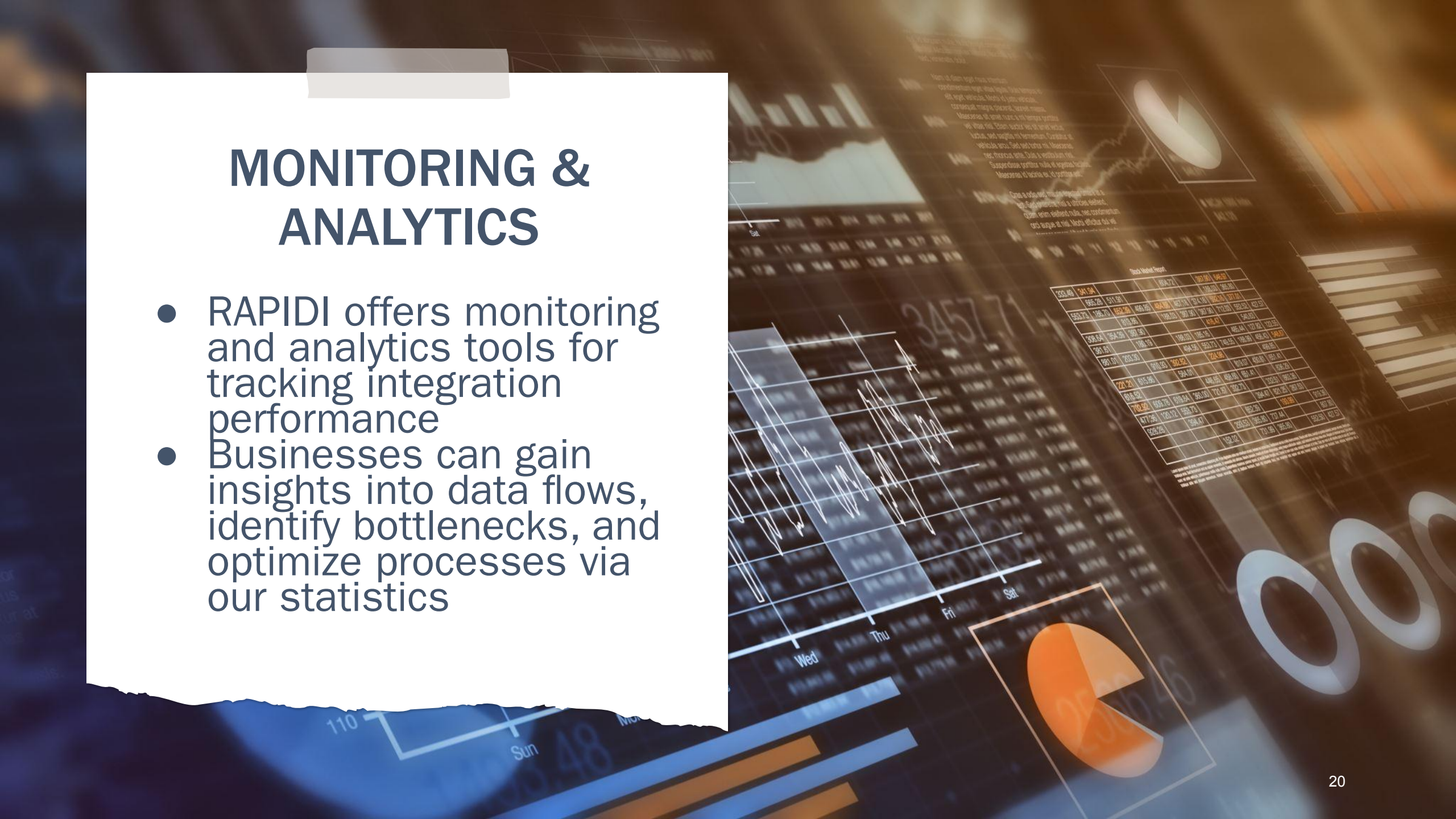
The flexibility to customize data flows to match specific business requirements.

# 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

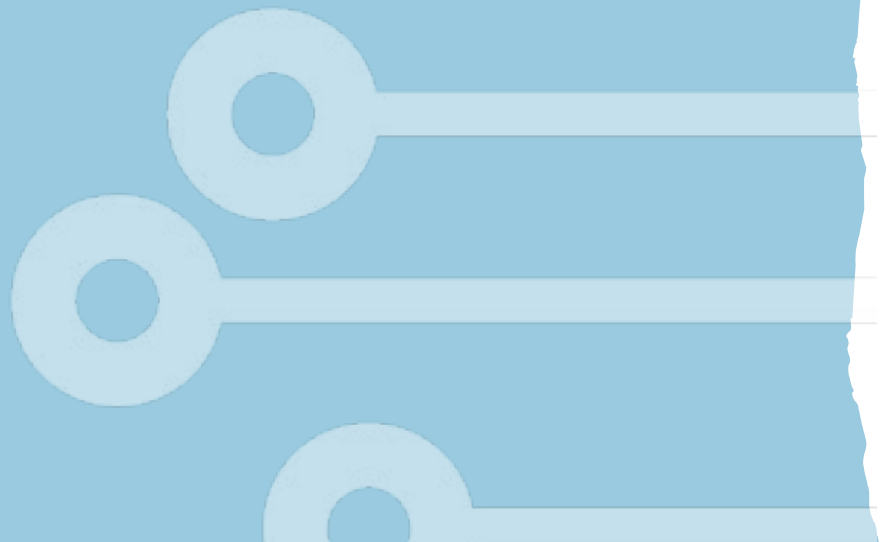
- RAPIDI offers monitoring and analytics tools for tracking integration performance
- Businesses can gain insights into data flows, identify bottlenecks, and optimize processes via our statistics



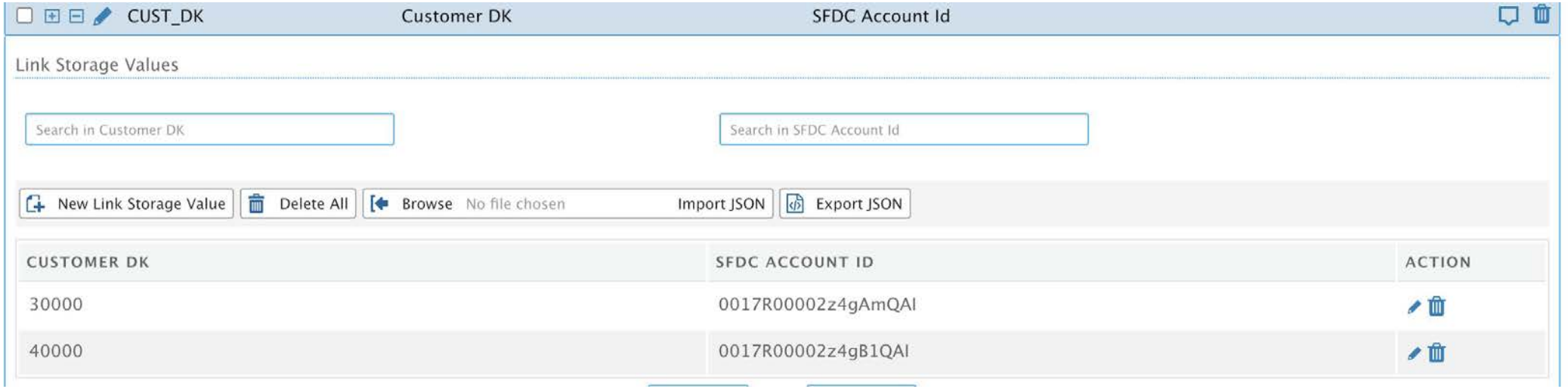
# A sneak peek into other RAPIDI *functionalities*

# 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.

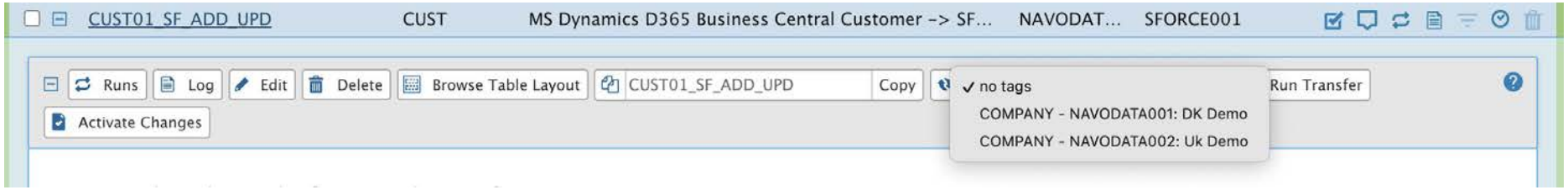


- [x] Enabled
- [ ] Update
- [x] Add
- [ ] Delete
- [ ] Actions
- [ ] Move
- [ ] Delete All
- [ ] Autogenerate Key
- [x] Disable Dest Lookup
- [ ] All Fields
- [ ] Continue on Error




# LINK STORAGES

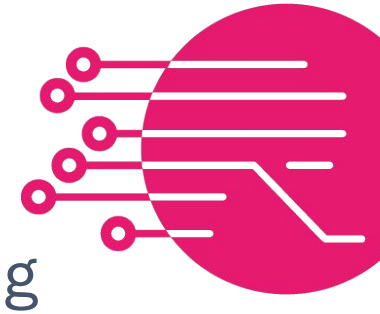
Dynamic lookup tables that can store your company data within Rapidi. At runtime, all records are added to the Link Storage tables.




# 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
- RapidiConnector

### 2 | Integration templates

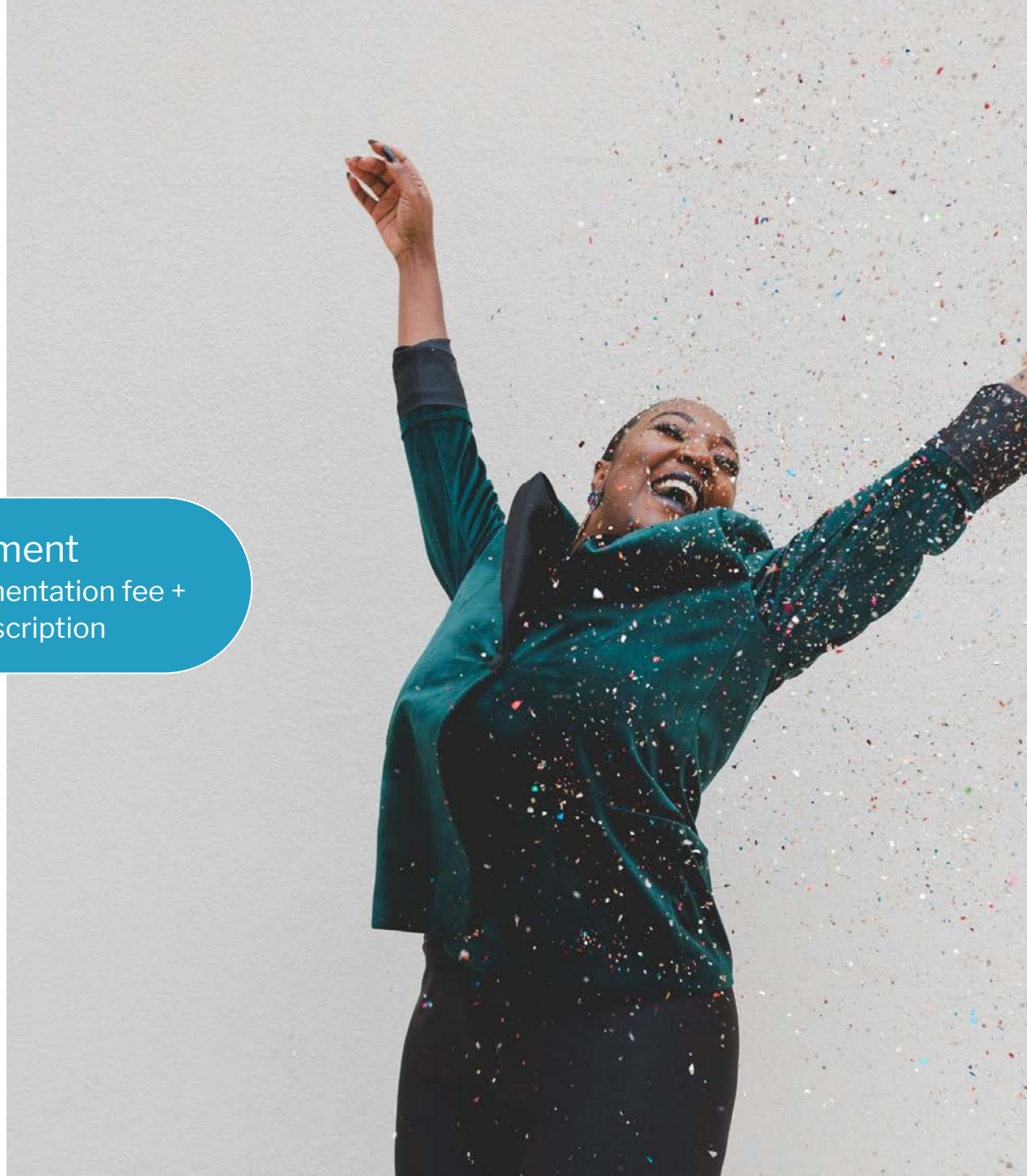
- Complete business processes
- Pre-configured
- Best practices
- Customizable
- Documentation

### 3 | Support

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

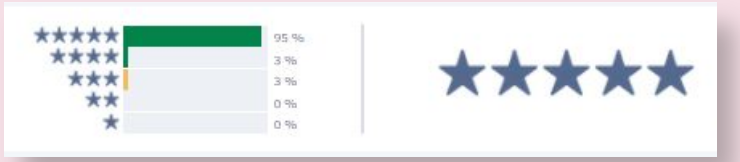
**Investment**

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

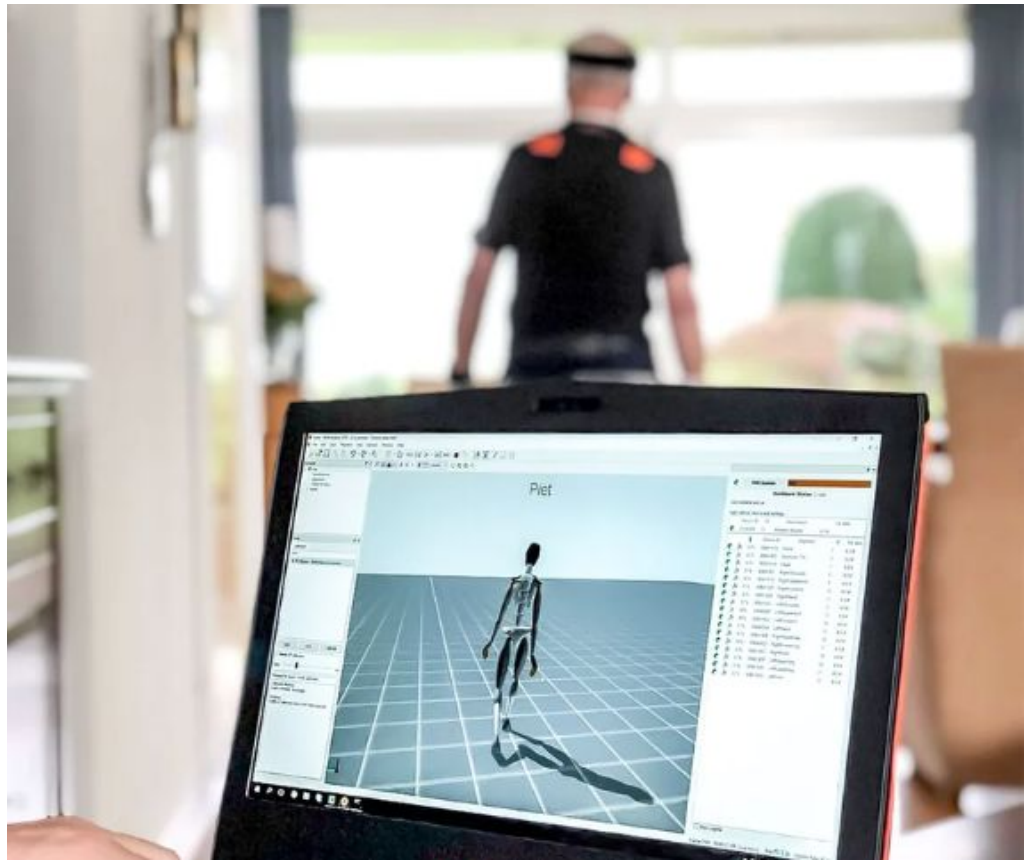
BioSafe Systems · AMETEK · Thompson Pump · Nexans · DTC · AVJennings · Fagron · KTBLACK SERVICES · Component Hardware · Onduline · REMA 1000 · Berling Media AB · Corey nutrition company · TECO · STBI saf-t-box · Ken Blanchard Companies · bbb · AdvancED · Diamond Wipes · CF.GROUP · ASSA ABLOY · BDO · NEXTSOURCE Biotechnology

# MOVELLA *Case Story*

*Rapidi proved its worth to us over a decade, and I would definitely recommend it to other companies.*

*Jeroen Weijts, Senior Operations Manager, Movella*

# ABOUT *Movella*




- Movella is a pioneering company dedicated to digitizing movement to empower individuals and organizations to drive positive change.
- Their mission revolves around providing intelligent solutions for sensing, capturing, and analyzing motion and states of being.
- Movella accelerates innovation and facilitates extraordinary outcomes across diverse sectors such as entertainment, sports, health, and industrial markets.

- Movella, a seasoned user of Rapidi for ten years, integrates NAV and Salesforce for efficient operations.
- The integration ensures seamless data flow, providing the sales team with comprehensive customer insights. Upgrading to NAV 2018 prompted changes in the Salesforce implementation, facilitated smoothly by Rapidi's intermediary role.
- This upgrade also included transitioning to NAV Web Services interface.

*Rapidi is intuitive when designing schedules. We also love the visibility that it provides, that assists us when a problem does occur.*

*Jeroen Weijts, Senior Operations Manager, Movella*

# How to get started with us?

Follow & Connect

info@rapidionline.com
www.rapidionline.com
MyRapidi.com/wiki

# RAPIDI *Implementation* PROCESS

**DISCOVERY**

Integration project scope validation and project kick-off

**ON-BOARDING**

On-boarding the customer onto the Rapidi platform and online collaboration platform Basecamp

**CONFIGURATION**

Integration configuration on the Rapidi platform and end-user testing

**DEPLOY TO PRODUCTION**

Initial data synchronization, upload of historical data, and the actual cutover to the production environment

**TRANSITION TO SUPPORT**

Post-go-live support, project closure, and transition to the operational support

RAPIDI

# QUESTIONS ?

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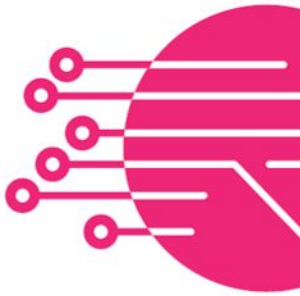
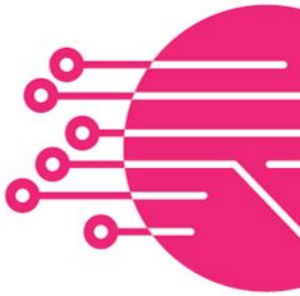
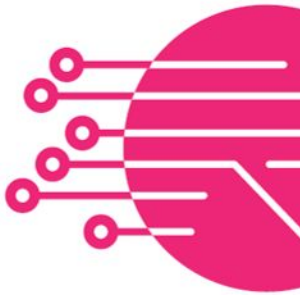


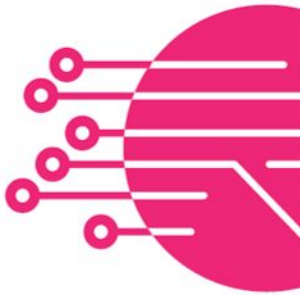
# How to set up your data integration project in 3 steps?



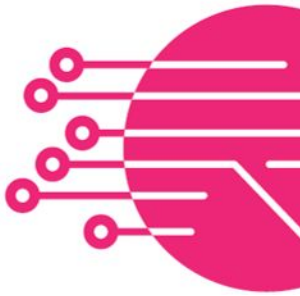
# How to ensure the best data mapping?



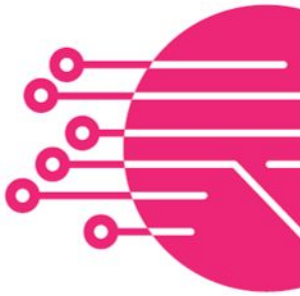
# Why it’s best to be prepared when handling errors?



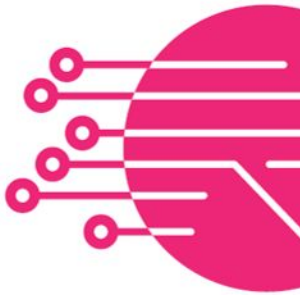
# Which systems does Rapidi support?



# Do you support custom objects?



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

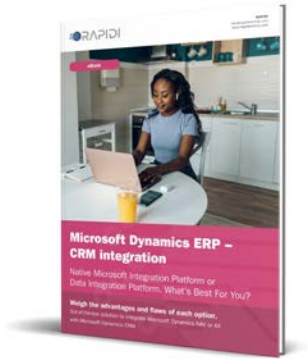


# Why should we choose Rapidi integration platform instead of using other standard integration tools?

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

**Solution overviews**

**Case stories and fact sheets**




**Documentation on MyRapidi.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



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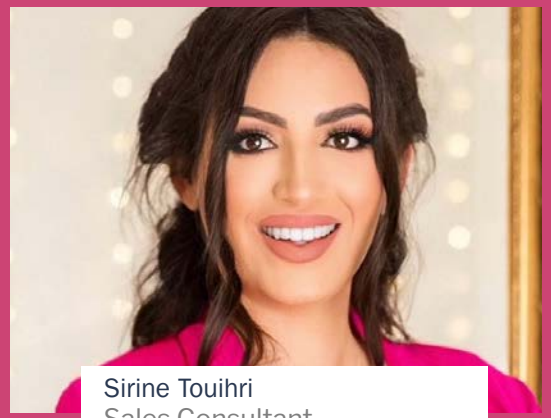
MyRapidi.com/wiki

# THANK YOU!

*www.rapidionline.com*



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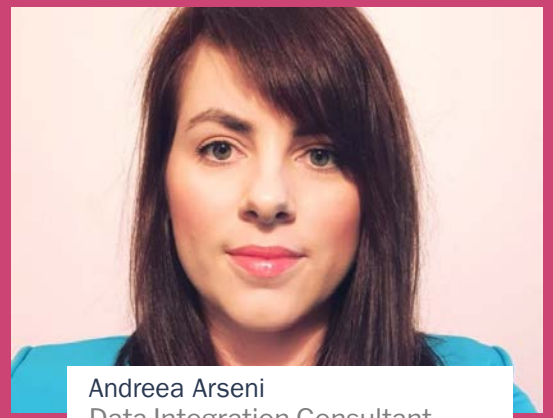

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