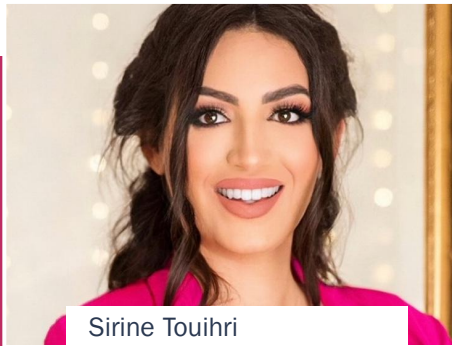
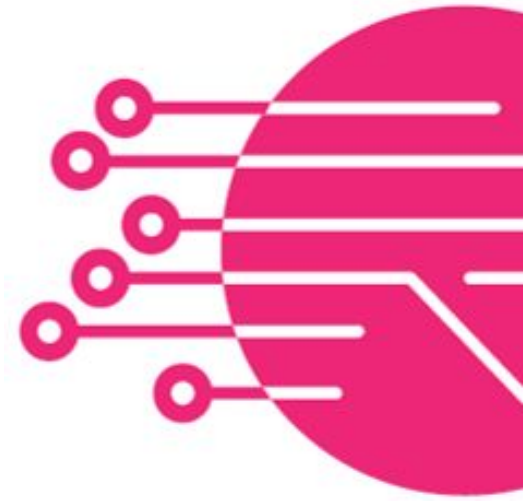
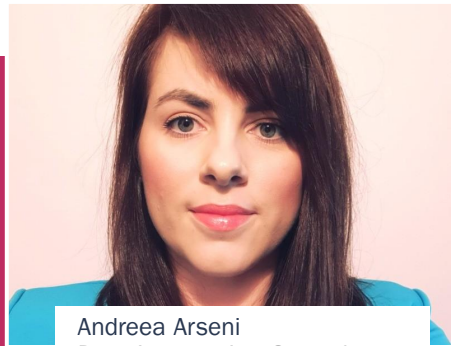


WEBINAR MAXIMIZING BUSINESS SYNERGY:

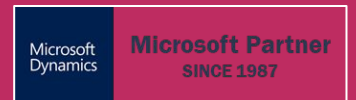
Salesforce to Salesforce Integration



Sirine Touihri
Sales Consultant

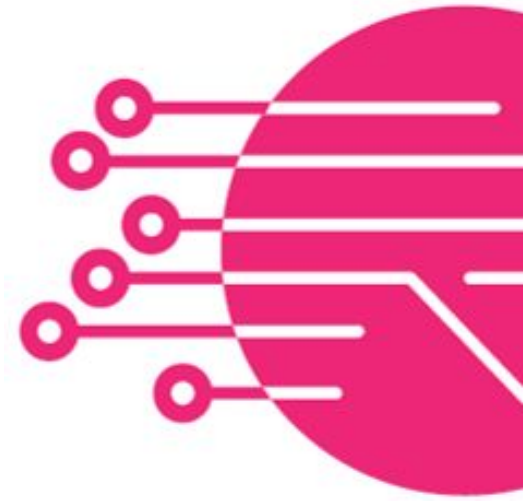


Andreea Arseni
Data Integration Consultant

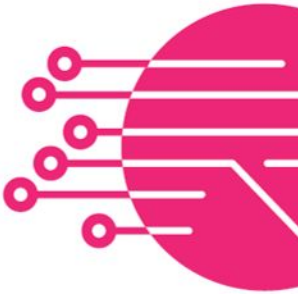


AGENDA

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



RAPIDI COMPANY *Profile*



Data integration *experts*

+ 30 years of data integration

Salesforce & Microsoft

Worldwide coverage

Flexible, simple and robust complete *solution*

Cutting edge cloud technology -
scalable & flexible

No programming

Five star AppExchange rating

Going the *extra mile* for our customers

Outstanding support

Great customer references

Flexible to match your needs



EMEA



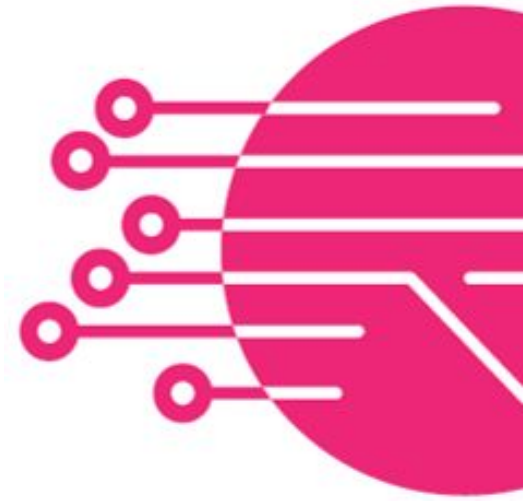
APAC



AMERICAS

IMPORTANCE OF INTEGRATION

All about simplifying the integration process

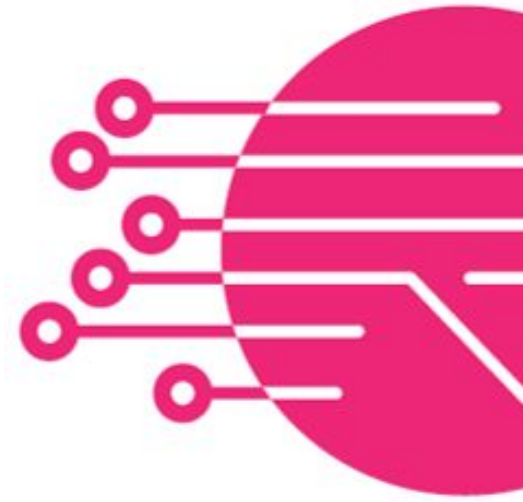


WHY is integration important?

- It streamlines business processes by connecting and sharing data through multiple instances;
- It offers real-time data synchronization;
- It improves decision-making and productivity via an unified customer data view;
- It reduces or eliminates data silos, manual processes, and communication gaps;
- It enhances the overall customer experience.

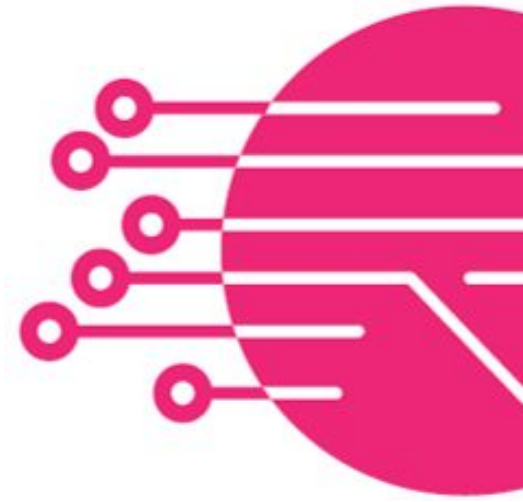
RAPIDI DATA INTEGRATION SOLUTIONS

Data Integration Made Easy

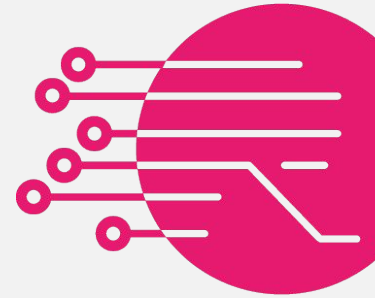





























RAPIDI *Data Integration Solutions*

- 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 Salesforce, Microsoft Dynamics ERPs and more!



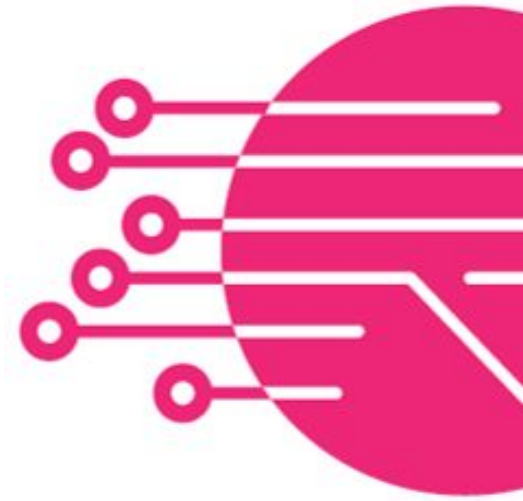
RAPIDI's *most common end-points*



 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	 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 for Finance and Operations	 Microsoft Dynamics C5	 MySQL	 Oracle	 Joomla	 NetSuite	 Syspro	 SQLite		

RAPIDI *Data Integration Solutions*

- **Data Integration** - Microsoft Dynamics ERP (cloud-based and on-premise) to Salesforce and/or D365 Sales
- **Data Replication** - between multiple Dynamics 365 Business Central and /or Finance Databases (also NAV/AX)
- Hubspot to Dynamics 365 Business Central
- REST API
- And many many more...





salesforce

salesforce

**iPaaS with no
staging of your
data**

**Easy to set up
No programming
required**

**Connect multiple
systems and
companies**

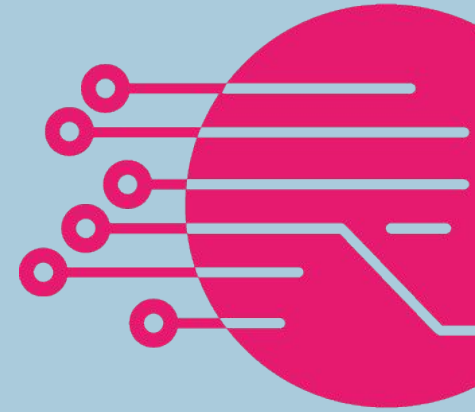
**Any data
Standard,
custom, apps**

**“All inclusive”
subscriptions
and services**

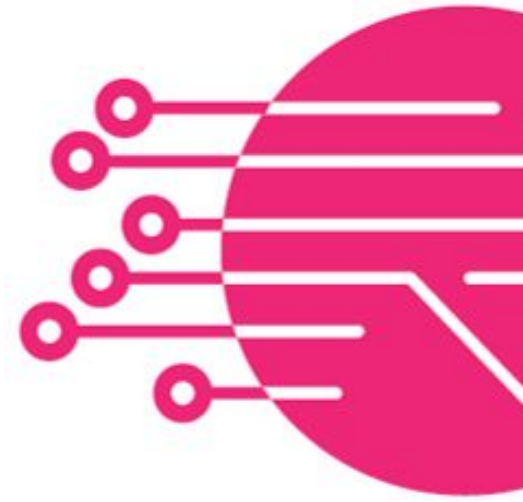
“

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

”



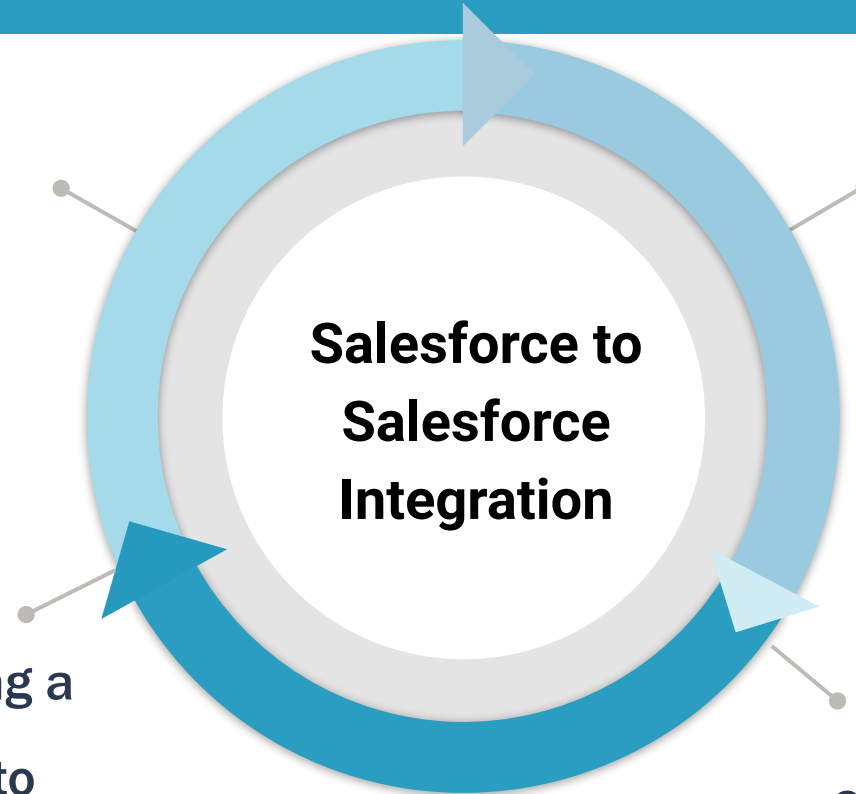
Salesforce - Salesforce *integration*



Salesforce to Salesforce Integration: *Use Cases*

- Large enterprises which operate across multiple business units (BUs)

- Companies that are undergoing a merger/acquisition and need to integrate sales and marketing data from two Salesforce orgs.



- Newly acquired entities that operate their Salesforce orgs independently while sharing essential records with the main org
- Or simply migrating from one Salesforce org to another.

DATA FLOWS *Salesforce - Salesforce*



salesforce

Salesforce Org 1

Leads
Accounts
Contacts
Products
Pricebooks
Opportunity
Quotes
Tasks
Events
Any objects
(custom or standard)



salesforce

Salesforce Org 2

Leads
Accounts
Contacts
Products
Pricebooks
Opportunity
Quotes
Tasks
Events
Any objects
(custom or standard)

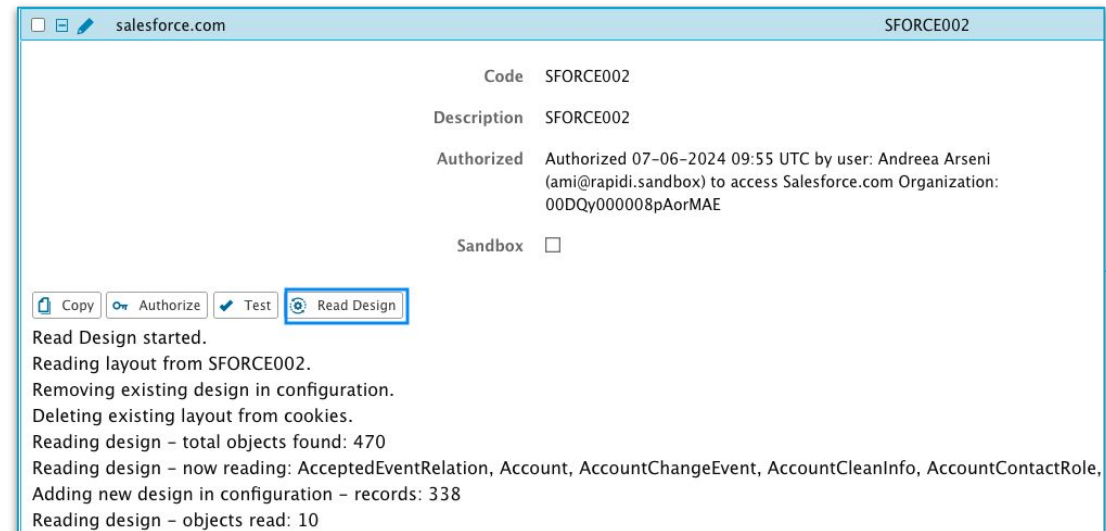
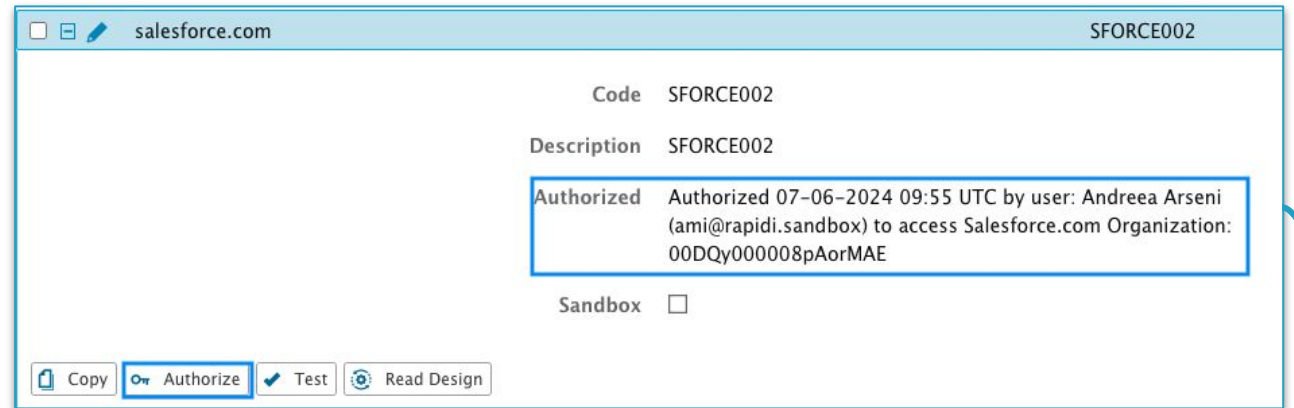
Link Storage/Lookup
Tables

Insert/Update/Upsert

Data Mapping & Transformation

Step 1: Create Connection

- Create a connection for each Salesforce Org
- Read the full layout from each Salesforce Org



Step 2: Decide on Actions

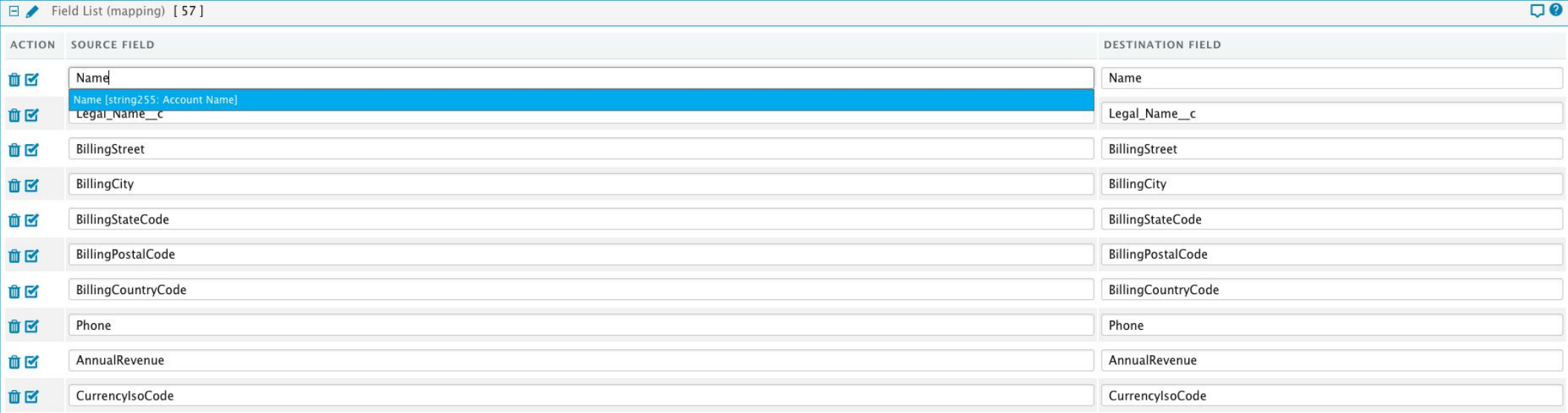
- **Choose the data flow action:**
 - **Add** (Create new accounts)
 - **Update** (Update existing accounts)
 - **Upsert** (Add and Update accounts)

**Disable Dest Lookup - In combination with Update and Add will trigger the use of the UPSERT facility in Salesforce.com.*

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

Step 3: Mapping & Transformation

- **Mapping & Transformation:** include all necessary fields in the mapping layout



The screenshot shows a mapping tool interface titled "Field List (mapping) [57]". It displays a table with three columns: "ACTION", "SOURCE FIELD", and "DESTINATION FIELD". The table lists various fields being mapped, with the "Name" field highlighted in blue. The "Name" field in the source is mapped to "Name" in the destination, and its type is noted as "Name [string255: Account Name]".

ACTION	SOURCE FIELD	DESTINATION FIELD
<input type="checkbox"/>	Name	Name
<input checked="" type="checkbox"/>	Name [string255: Account Name]	
<input checked="" type="checkbox"/>	Legal_Name__c	Legal_Name__c
<input checked="" type="checkbox"/>	BillingStreet	BillingStreet
<input checked="" type="checkbox"/>	BillingCity	BillingCity
<input checked="" type="checkbox"/>	BillingStateCode	BillingStateCode
<input checked="" type="checkbox"/>	BillingPostalCode	BillingPostalCode
<input checked="" type="checkbox"/>	BillingCountryCode	BillingCountryCode
<input checked="" type="checkbox"/>	Phone	Phone
<input checked="" type="checkbox"/>	AnnualRevenue	AnnualRevenue
<input checked="" type="checkbox"/>	CurrencyIsoCode	CurrencyIsoCode

Step 4: Configure Link Storages for unique ID

The screenshot shows two side-by-side configuration panels for 'ACCOUNTS'. The left panel is titled 'Salesforce Org 1 Account Id' and the right panel is titled 'Salesforce Org 2 Account Id'. Both panels have a 'New' button and a table with columns for 'Account' and 'Id'. Below the table, the configuration details are as follows:

Configuration	Connection	Table Name	Link Fields
Salesforce Org 1 Account Id	SFORCE001	Account	Id
Salesforce Org 2 Account Id	SFORCE002	Account	Id

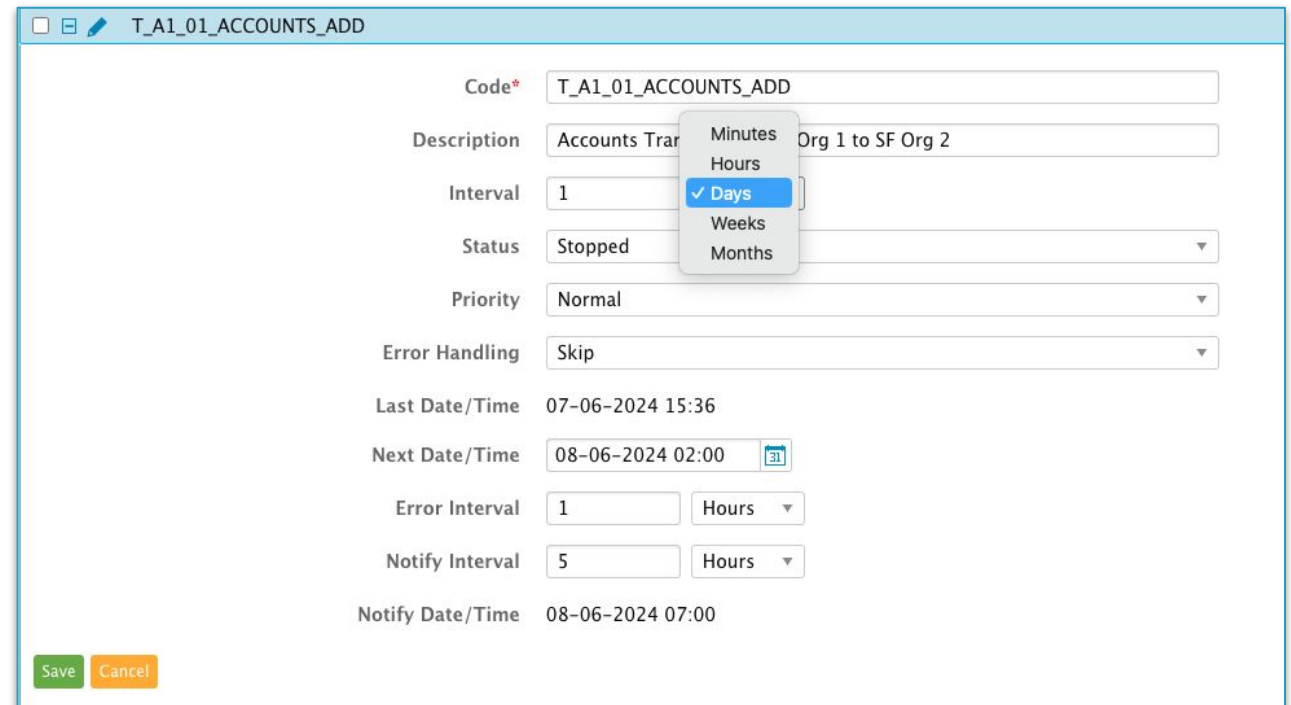
- Configure the **Link Storage/Lookup Tables** to store the Salesforce IDs of your records:

The screenshot shows a table with two columns: 'SALESFORCE ORG 1 ACCOUNT ID' and 'SALESFORCE ORG 2 ACCOUNT ID'. The table contains eight rows of data. Above the table, there are buttons for 'New Link Storage Value', 'Delete All', 'Browse' (with 'No file chosen'), 'Import JSON', and 'Export JSON'.

SALESFORCE ORG 1 ACCOUNT ID	SALESFORCE ORG 2 ACCOUNT ID
0017R00002whYbpQAE	001Qy00000MaqzVIAR
0017R00002whYbqQAE	001Qy00000Maku8IAB
0017R00002whYbrQAE	001Qy00000Mar17IAB
0017R00002whYbsQAE	001Qy00000MaPptIAN
0017R00002whYbtQAE	001Qy00000Mar2jIAB
0017R00002whYbuQAE	001Qy00000Mah0DIAR
0017R00002whYbvQAE	001Qy00000MaqGMAZ

Step 5: Set up Schedules

- **Schedule the data flows so all records are created and updated in a timely manner:**
 - Description
 - Interval/frequency
 - Priority
 - Error Handling
 - Error interval
 - Notify Interval



The screenshot displays the configuration window for a data flow schedule in the RAPIDI system. The window title is "T_A1_01_ACCOUNTS_ADD". The configuration includes the following fields and values:

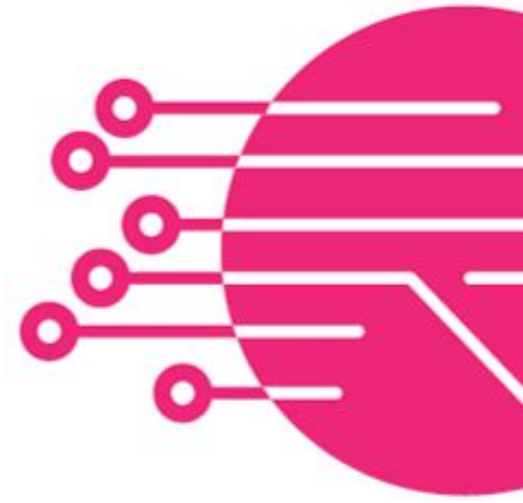
- Code***: T_A1_01_ACCOUNTS_ADD
- Description**: Accounts Tran Org 1 to SF Org 2
- Interval**: 1 (with a dropdown menu open showing options: Minutes, Hours, Days (checked), Weeks, Months)
- Status**: Stopped
- Priority**: Normal
- Error Handling**: Skip
- Last Date/Time**: 07-06-2024 15:36
- Next Date/Time**: 08-06-2024 02:00 (with a calendar icon)
- Error Interval**: 1 Hours
- Notify Interval**: 5 Hours
- Notify Date/Time**: 08-06-2024 07:00

At the bottom left, there are "Save" and "Cancel" buttons.

Salesforce to Salesforce Integration: *Best Practices*

- **Define the integration or migration scope** (objects and records)
- **Tidy your data** - ensure that your data is clean, tidy, and your Salesforce orgs are aligned in terms of data structure)
- **Create an integration plan** (always include a data validation process and error troubleshooting steps)
- **Create a contingency plan**

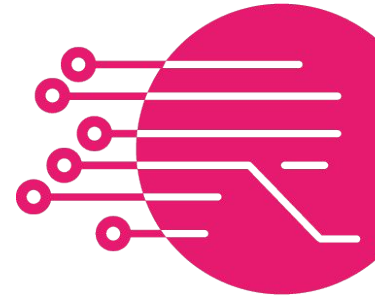




RAPIDI *Key functionalities*



RAPIDI's *Key Functionalities*



Data Mapping and Transformation

Real-Time Synchronization

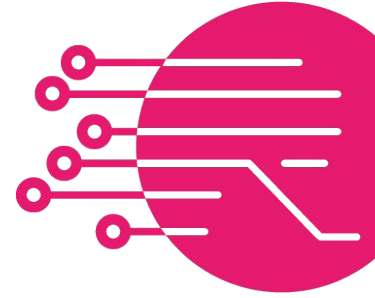
Customization and Scalability

Automated Workflows

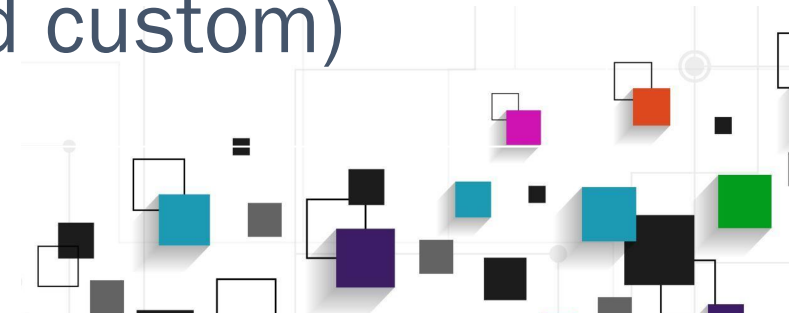
Security Measures

Monitoring and Analytics

DATA MAPPING & TRANSFORMATION



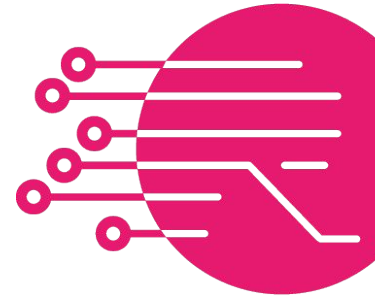
- Ability to map and transform data effortlessly between your Salesforce organisations
- Support for custom data fields, ensuring flexibility for various business needs
- RAPIDI offers an intuitive data mapping interface that allows you to customize your current data flows
- Rapidi support any objects (standard and custom)





REAL-TIME

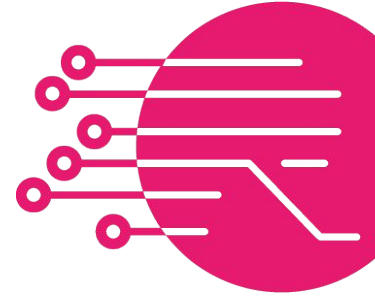
Synchronization



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

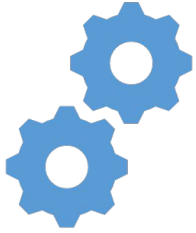
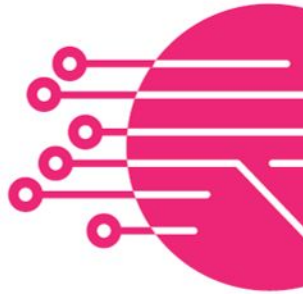


CUSTOMIZATION & SCALABILITY

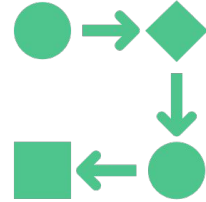


- RAPIDI can adapt to unique business processes and structures;
- It ensures scalability for businesses of all sizes - from small enterprises to large corporations;
- It provides customization based on industry-specific needs.

AUTOMATED WORKFLOW



RAPIDI's automated workflows streamline business processes.



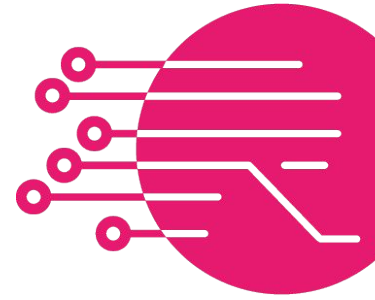
Repetitive tasks are automated, reducing manual effort and minimizing errors;



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



SECURITY MEASURES

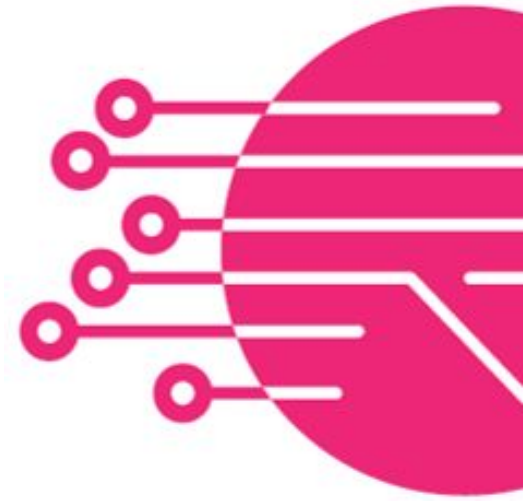


- RAPIDI is committed to data security and compliance (encryption protocols, access controls, and other security features).
- We provide confidence to decision-makers about the safety of sensitive business data.

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






Write-Back Fields



Store New ID Field - It allows you to store the ID of the newly created record into the source system.


Transferred Field - It allows you to write a timestamp (date/time, text, or boolean true value) back into the source table on each transferred record.










Tag Values



Tag Values are used to store the corresponding sets of tags and tag values that will be used at runtime. When running a Transfer manually (which has tags defined), you need to select a set of tags to run it with. Also when you generate or create schedules, you can select the Tag Values to be added to the Schedules.

 Edit tag values  Generate tag values  New tag values line

ACTIONS	CONN	COMP	CURR
	SFORCE001	SF ORG 1	EUR
	SFORCE002	SF ORG 2	EUR

 A1_01_ACCOUNTS_ADD Accounts Transfer from Salesforce Org 1 to Salesforce Org 2

  Runs  Log  Edit  Delete  Browse Table Layout  A1_01_ACCOUNTS_ADD Copy  no tags  Run Transfer

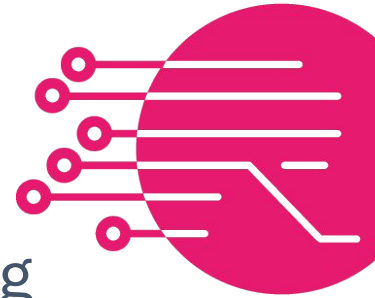
  General [SFORCE001: Account -> SFORCE002: Account [Enabled Add DisableDestLookup ContinueOnError, LinkStorage, ACCOUNTS]

- COMPANY - SFORCE001: SF ORG 1
- COMPANY - SFORCE002: SF ORG 2

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 several Salesforce orgs;
- 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



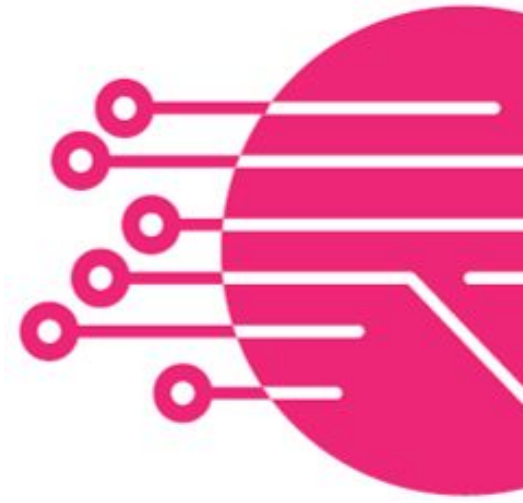
- Maintain integration
- Add fields to existing transfers
- Integration advisory
- Resolve data errors

Investment

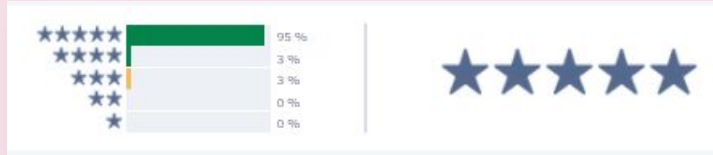
One-time implementation fee +
Yearly subscription



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





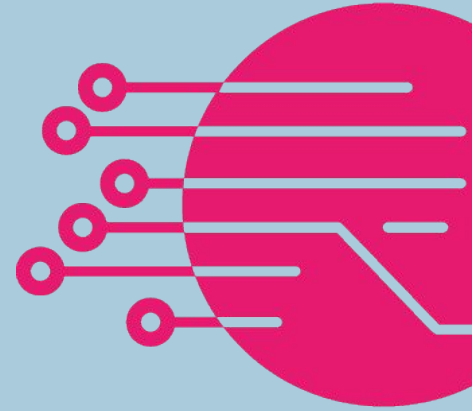
Rapidi a MUST

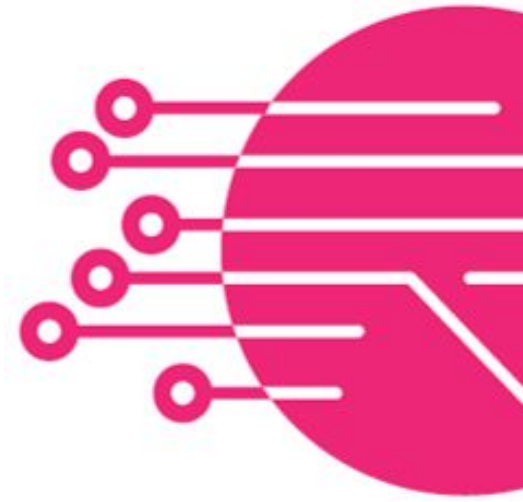
Since 2022, we've had the pleasure of utilizing **Rapidi for our data synchronization needs between two Salesforce instances**. The ease with which we were able to configure integrations was remarkable, and the reliability of the syncing tool has been a game-changer for us.

Maintenance and updates are a breeze, ensuring our systems are always in harmony without the need for complex coding. **Rapidi has been an essential NO CODE solution that seamlessly integrates our Salesforce ecosystem.**

For anyone facing the challenge of managing multiple Salesforce instances, I can't recommend Rapidi highly enough!

Lorraine McCracken, Director of IT Enterprise Business Applications, Kaleris





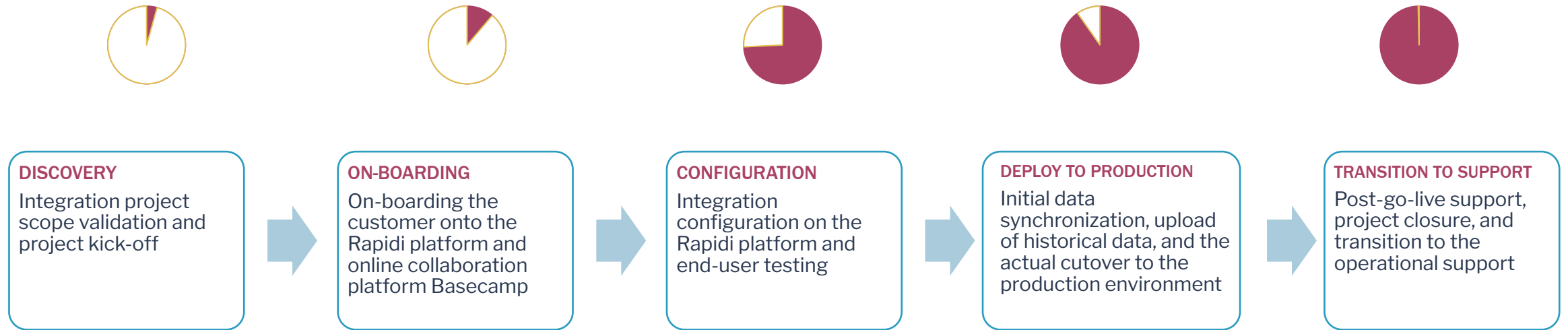
How to get started with us?

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www.rapidionline.com
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RAPIDI *Implementation* PROCESS



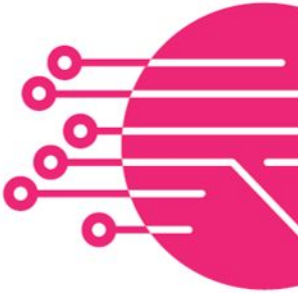


QUESTIONS ?

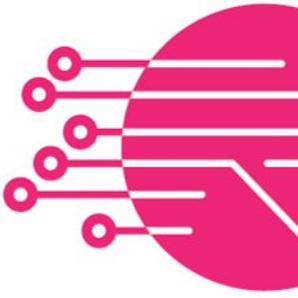
Follow &
Connect



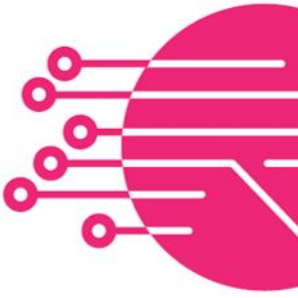
info@rapidionline.com
www.rapidionline.com
MyRapidi.com/wiki



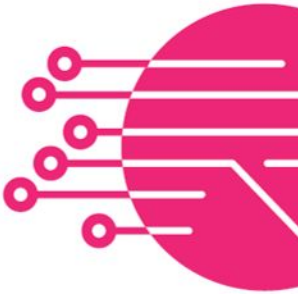
Why should we choose Rapidi integration platform instead of using other standard integration tools?



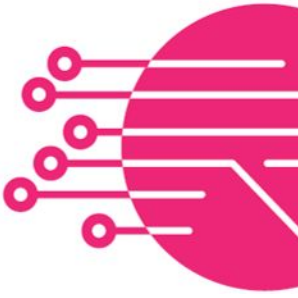
How to set up your data integration project in 3 steps?



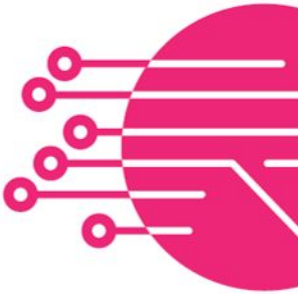
How to ensure the best data mapping?



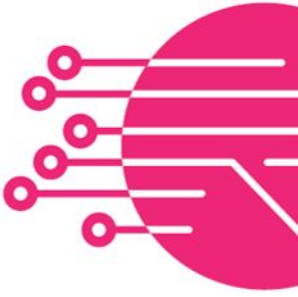
Why it's best to be prepared when handling errors?



Which systems does Rapidi support?



Do you support custom objects?

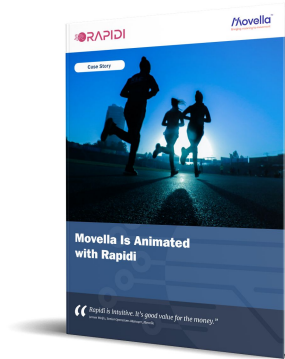


Why should we choose Rapidi integration platform instead of building integration by ourselves?

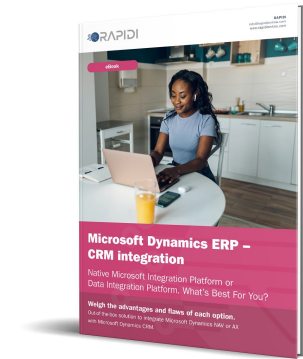
FOR MORE INFO *visit www.rapidionline.com*
CONTACT US *via www.rapidionline.com/contact-us*



**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

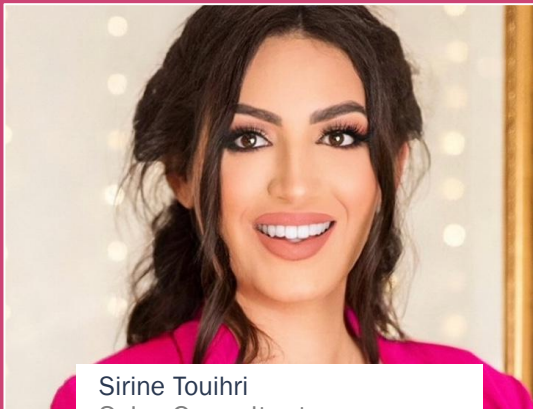


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www.rapidionline.com
MyRapidi.com/wiki

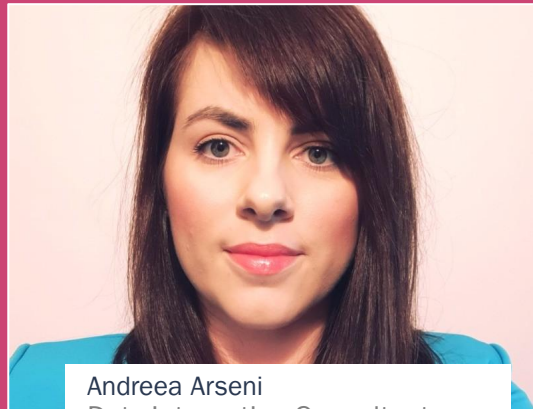


THANK YOU!

www.rapidionline.com



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Andreea Arseni
Data Integration Consultant
aa@rapidionline.com

