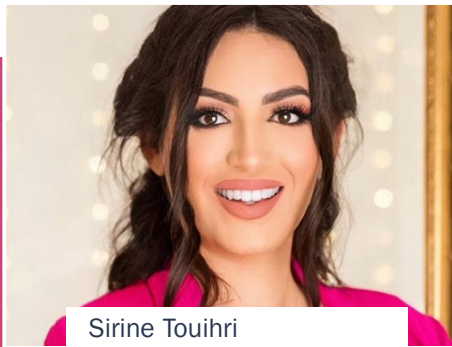
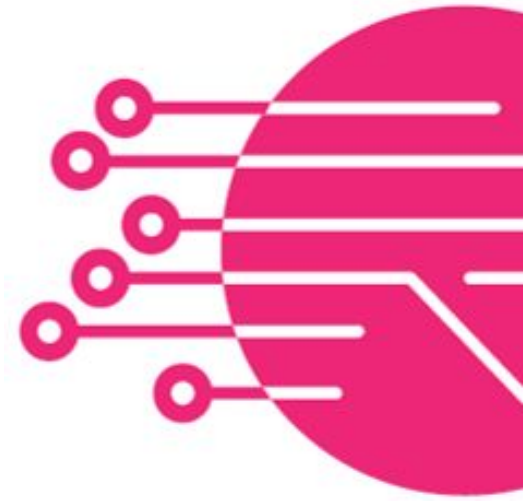
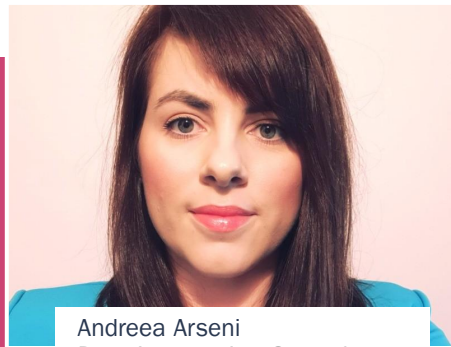


WEBINAR MAXIMIZING BUSINESS SYNERGY:

Hubspot - Microsoft Dynamics 365 ERP Integration



Sirine Touihri
Sales Consultant

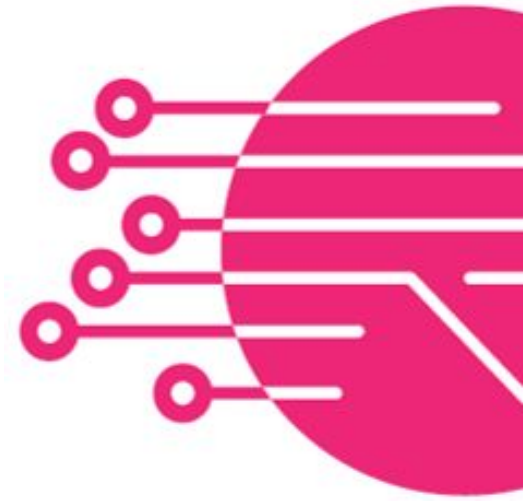


Andreea Arseni
Data Integration Consultant

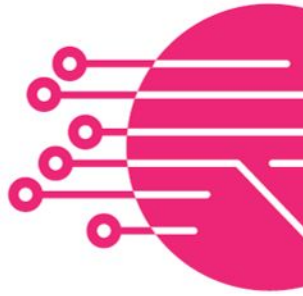


AGENDA

- Introduction to RAPIDI
- Importance of Integration
- RAPIDI Integration Solutions
- Hubspot - MS Dynamics 365 ERP Integration
- Customer Testimonials
- How to get started with us?
- Q&A



RAPIDI COMPANY *Profile*



Data integration *experts*

+ 30 years of data integration

Salesforce, Microsoft,
Hubspot and more

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



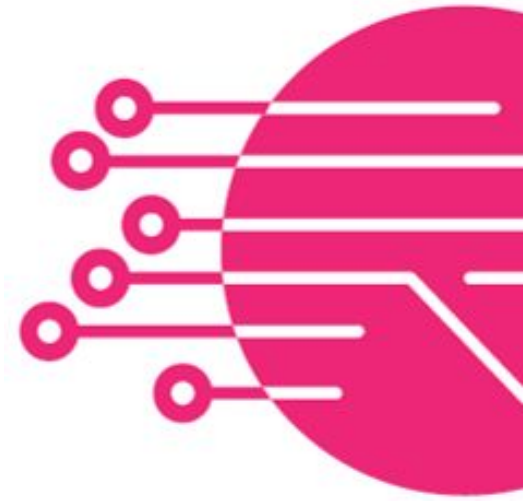
APAC



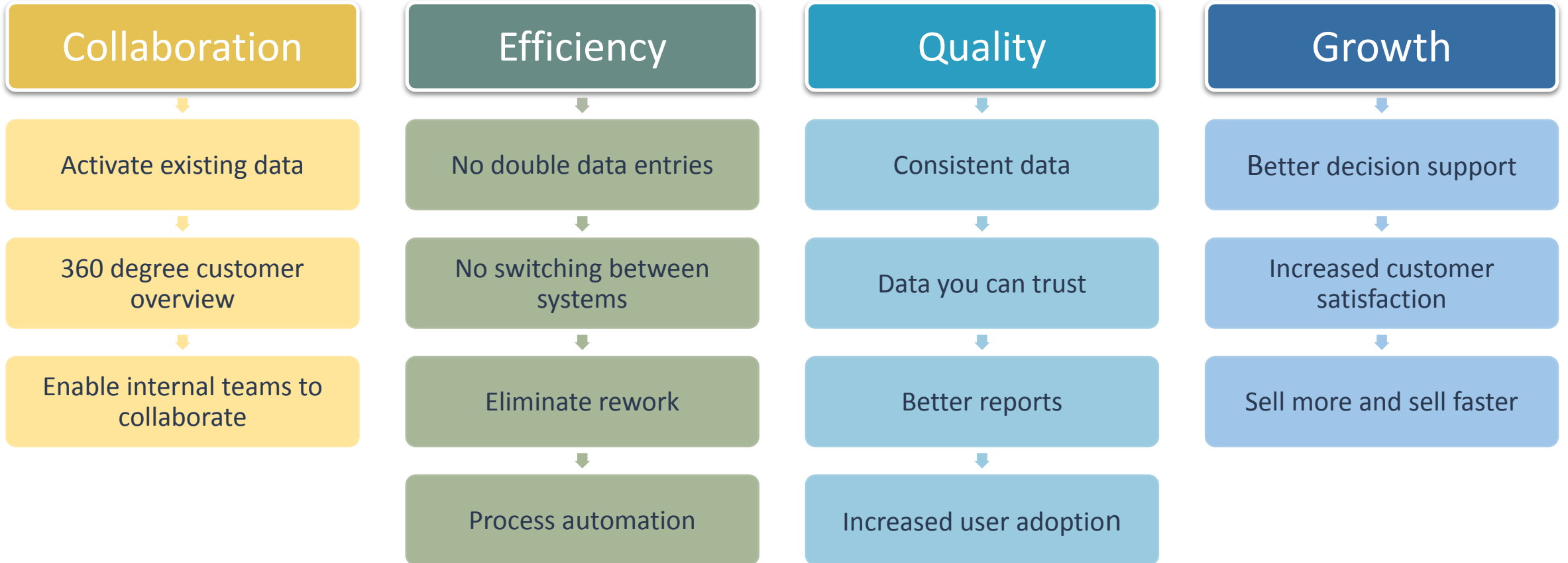
AMERICAS

IMPORTANCE OF INTEGRATION

All about simplifying the integration process



WHY *integrate*?



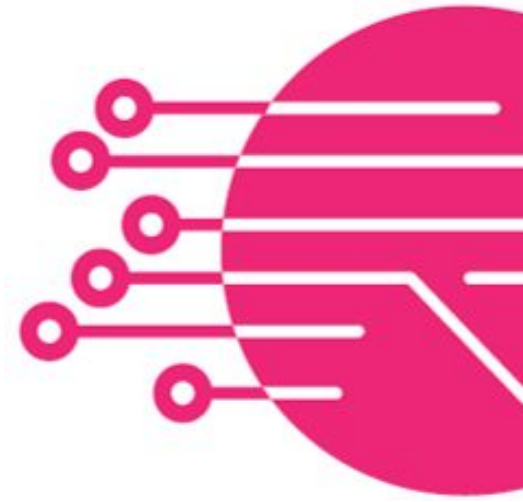
WHY is integration important?



- It streamlines business and sales processes
- It ensures data consistency across systems
- It offers real-time data synchronization
- It improves decision-making and productivity
- It reduces or eliminates data silos, manual processes, and communication gaps
- It enhances the overall customer experience

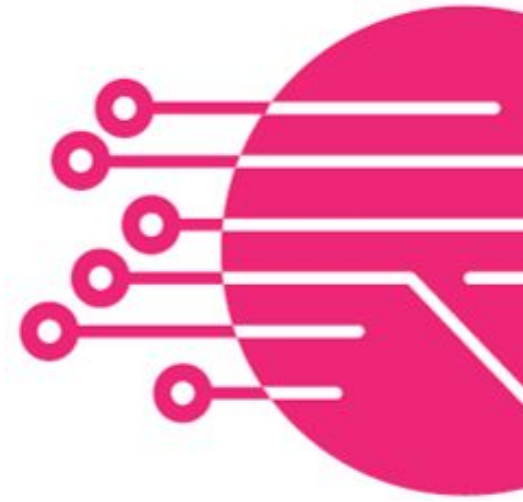
RAPIDI DATA INTEGRATION SOLUTIONS

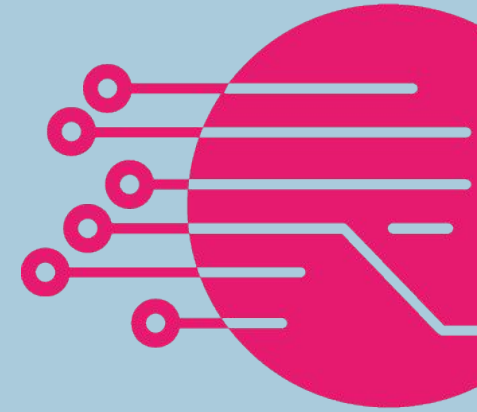
Data Integration Made Easy



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 Microsoft Dynamics ERPs, Salesforce, Hubspot and more!



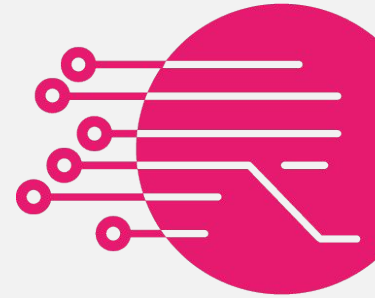































“

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

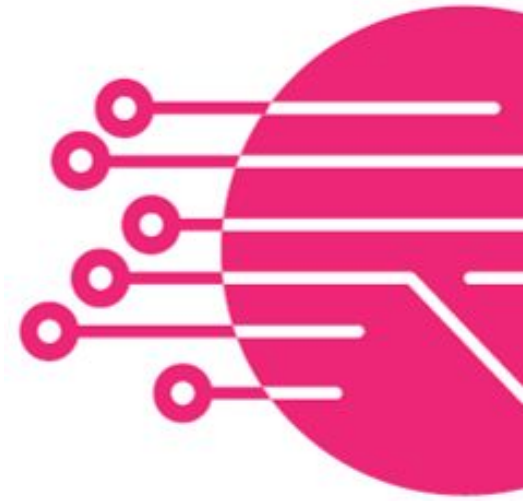
”

RAPIDI's *most common end-points*



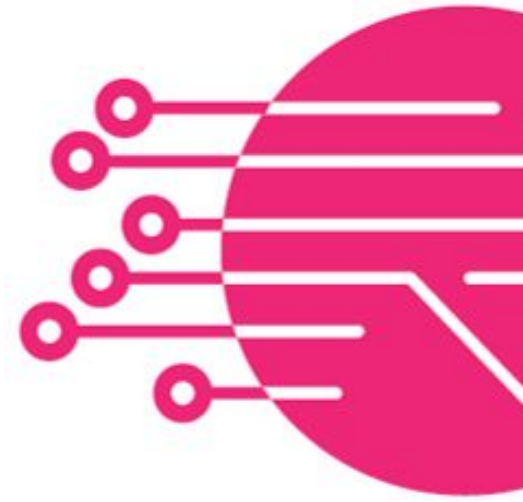
 Salesforce.com	 Microsoft Dynamics 365	 Hubspot CRM	 Shopify E-commerce	 Google Big Query	 Storyblok		
 Microsoft Dynamics 365 Business Central	 Microsoft Dynamics 365 Finance	 Microsoft Dynamics 365 Sales	 Microsoft Dynamics 365 Supply Chain Management	 REST Web Services	 OData	 Microsoft SQL Server	
 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 for Finance and Operations	 Microsoft Dynamics C5	 MySQL	 Oracle	 Joomla	 NetSuite	 Syspro	 SQLite

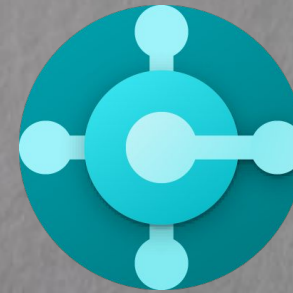
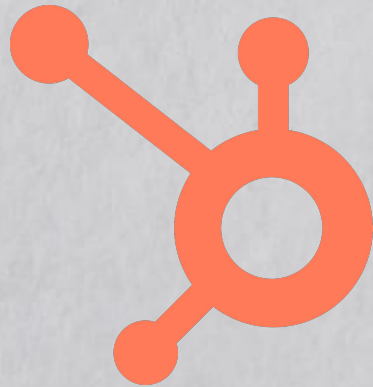
RAPIDI *Data Integration Solutions*



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

Hubspot - MS Dynamics 365 ERP *integration*





**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: *Hubspot - MS Dynamics 365 BC*




Hubspot		Microsoft Dynamics 365
Companies	↔	Customers
Contacts	↔	Contacts
Products	←	Items
Product Prices	←	Item Prices
Deals	⇒	Sales Orders
Orders	←	Sales Orders
Sales Invoices	←	Posted Sales Invoices
Any Objects (custom & standard)	←	Any Objects (custom & standard)

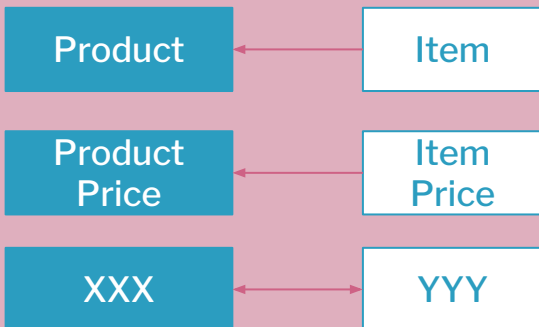
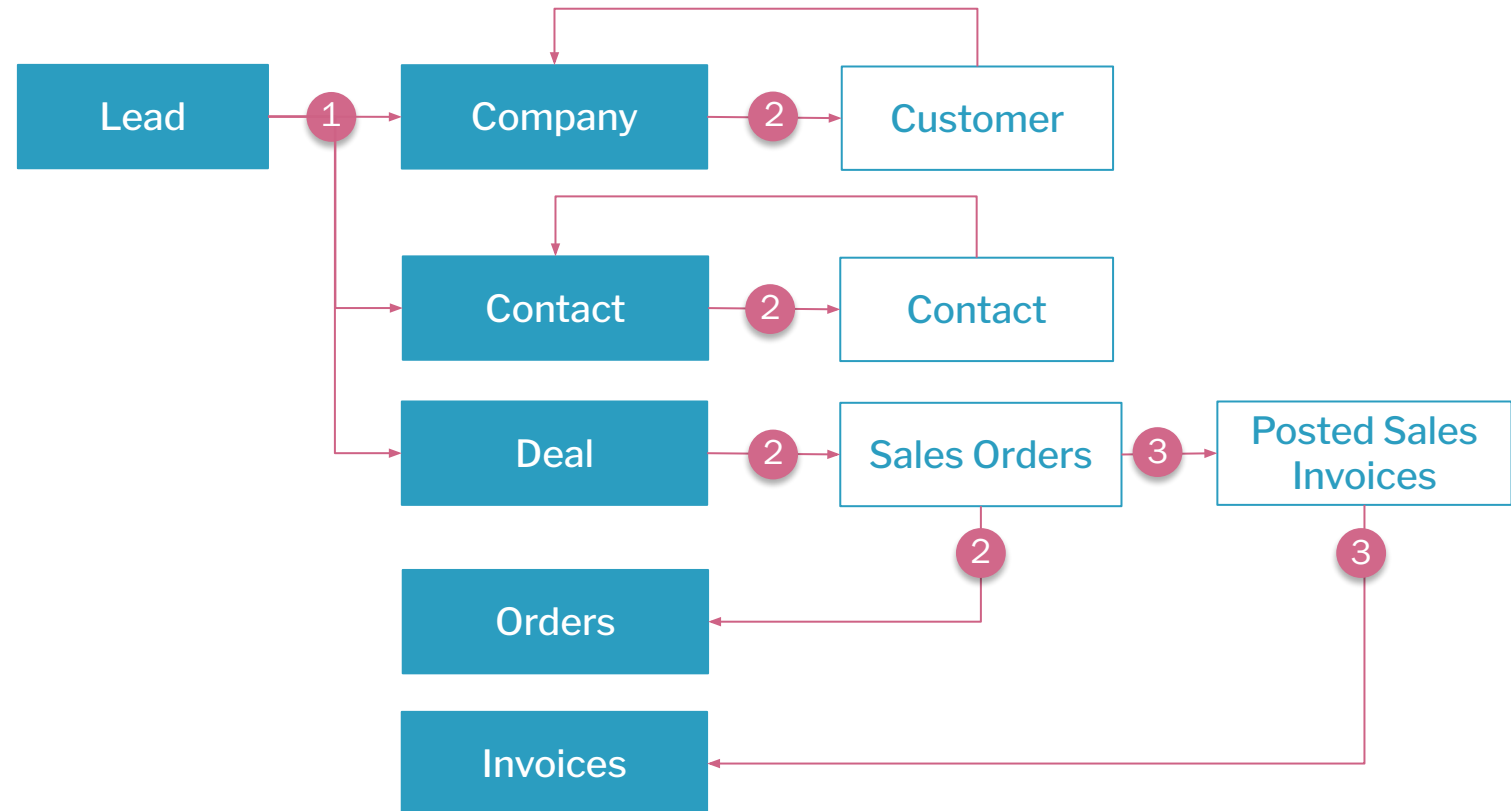
QUOTE TO CASH *Example*

STEPS

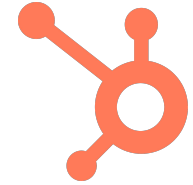
1. Lead is qualified
2. Quote is accepted
3. Order is invoiced
4. Invoice is paid

 Hubspot

 Microsoft Dynamics 365 ERP



DATA FLOWS *Business Central - Hubspot*



Customers
Contacts
Items
Item Prices
Sales Orders
Sales Invoices
Any objects
(custom or standard)

Link Storage/Lookup Tables

Insert/Update/Upsert

Data Mapping & Transformation

Companies
Contacts
Products
Product Prices
Deals
Orders
Invoices
Any objects
(custom or standard)

Step 1: Create Connection

- Create a connection for each system
- Read the full layout from each connection



****For the Business Central connection setup, please check our knowledge base repository <https://wiki.myrapidi.com/> since there are multiple options available.**

Step 2: Decide on Actions

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













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







- 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

Field List (mapping) [6]

ACTION	SOURCE FIELD	DESTINATION FIELD
 	No	hs_sku
 	No [String20: No., [PK,Not Nullable]] Description	name
 	Type	hs_product_type
 	Unit_Price	price
 	Unit_Cost	hs_cost_of_goods_sold
 	Description	description

 New  Delete Fieldlist  Build new fieldlist  Build fieldlist from source  Build fieldlist from destination  Browse Table Layout

Step 4: Configure Link Storages

- Configure the **Link Storage/Lookup Tables** to store the Business Central and Hubspot IDs of your records:

NAVODATA001	CustomerCard	No
Connection	NAVODATA001	
Table Name	CustomerCard	
Link Fields	No	

HUBSPOT001	companies	hs_object_id
Connection	HUBSPOT001	
Table Name	companies	
Link Fields	hs_object_id	

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

CUSTOMER DK	HUBSPOT OBJECT ID
30000	9674758112
40000	9668625102

show less - 10 - show more

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 shows a configuration window for a data flow schedule. The window title is "G_CUST_NAVODATA001_CRONUS_DK" and the user is "n/a". The form contains the following fields:

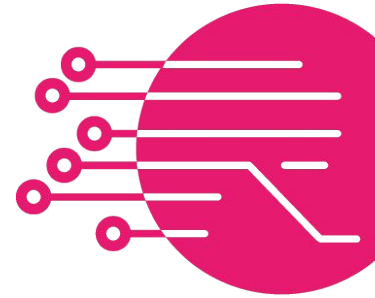
- Code***: G_CUST_NAVODATA001_CRONUS_DK
- Description**: BC Cust... spot Companies ADD
- Interval**: 1 (A dropdown menu is open over this field, showing options: Minutes, Hours, Days (selected), Weeks, Months)
- Status**: Ok
- Priority**: Normal
- Error Handling**: Skip
- Last Date/Time**: n/a
- Next Date/Time**: 05-08-2024 15:19 (with a calendar icon)
- Error Interval**: 1 Hours
- Notify Interval**: 5 Hours

Business Central to Hubspot Integration: *Best Practices*

- **Define the integration scope**
 - Have a clear understanding of the scope and how the data should flow from one system to another;
- **Use timestamp fields**
 - Make sure that ,in both systems, you timestamp fields are available;
- **Create an integration plan**
 - Always include a data validation process and error troubleshooting steps;
- **Create a contingency plan**



RAPIDI's *Key Functionalities*



Data Mapping and Transformation

Real-Time Synchronization

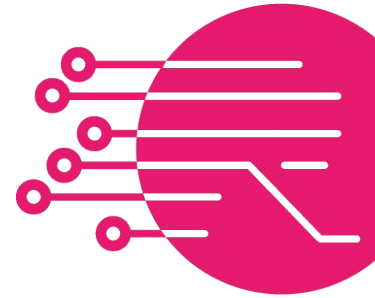
Customization and Scalability

Automated Workflows

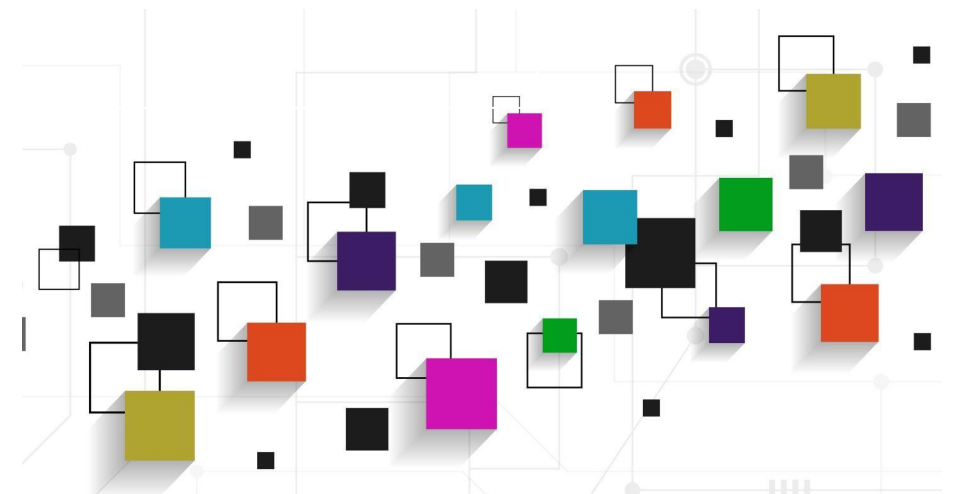
Security Measures

Monitoring and Analytics

DATA MAPPING & TRANSFORMATION

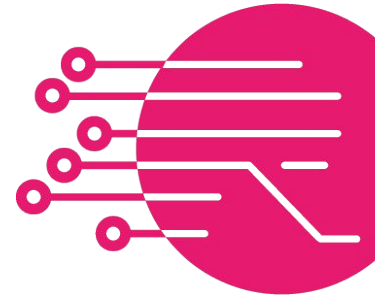


- Ability to map and transform data effortlessly between Microsoft Dynamics ERPs and Hubspot via our pre-built mapping templates;
- Support for custom data fields, ensuring flexibility for various business needs;
- RAPIDI offers an intuitive data mapping interface that allows you to customize your current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



REAL-TIME

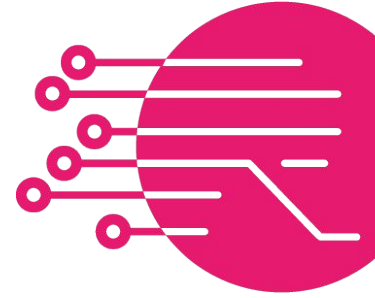
Synchronization



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

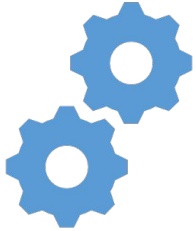
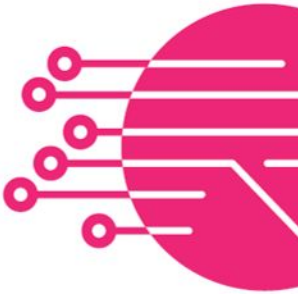


CUSTOMIZATION & SCALABILITY

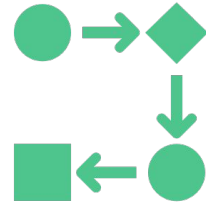


- RAPIDI can adapt to unique business processes and structures;
- It ensures scalability for businesses of all sizes - from small enterprises to large corporations;
- It provides customization based on industry-specific needs.

AUTOMATED WORKFLOW



RAPIDI's automated workflows streamline business processes.

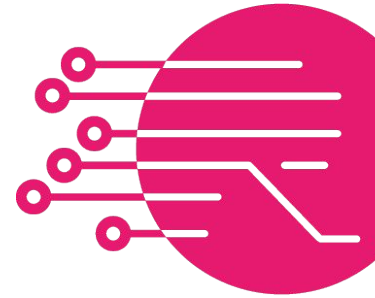


Repetitive tasks are automated, reducing manual effort and minimizing errors;



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

SECURITY MEASURES

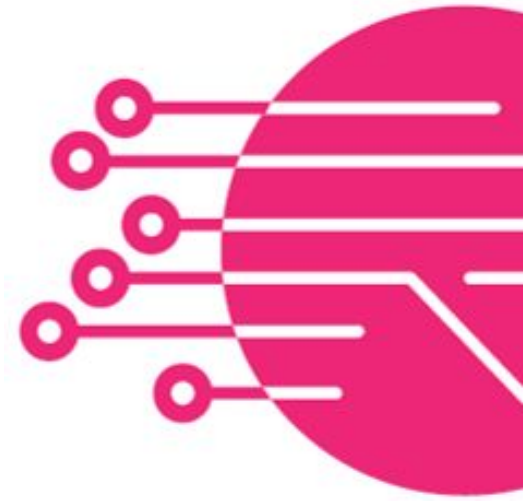


- RAPIDI is committed to data security and compliance (encryption protocols, access controls, and other security features).
- We provide confidence to decision-makers about the safety of sensitive business data.

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.

Edit tag values Generate tag values New tag values line							
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

CUST01_SF_ADD_UPD CUST MS Dynamics D365 Business Central Customer -> SF... NAVODAT... SFORCE001

Runs Log Edit Delete Browse Table Layout CUST01_SF_ADD_UPD Copy Run Transfer

Activate Changes

- ✓ 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 data integration solutions between many major ERP & CRM applications such as integrations between Microsoft Dynamics products, Salesforce, Hubspot, Netsuite, Oracle and SQL databases to name a few.
- 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



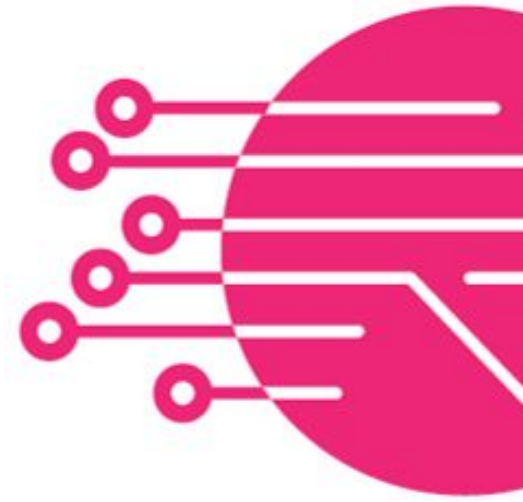
- Included in subscription
- Maintain integration
- Add fields to existing transfers
- Integration advisory
- Resolve data errors

Investment

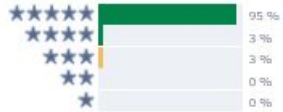
One-time implementation fee +
Yearly subscription



CUSTOMER *Testimonials*



HAPPY CUSTOMERS



4,9/5,0

Average rating on major IT vendor platforms such as Salesforce AppExchange, Gartner Digital etc.

“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



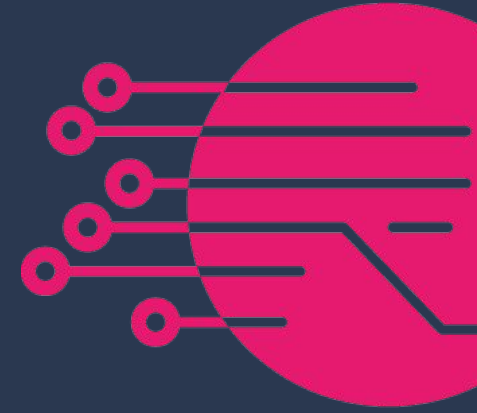
4,8

Average Support rating the past 8 years

Any Industry

Any geography



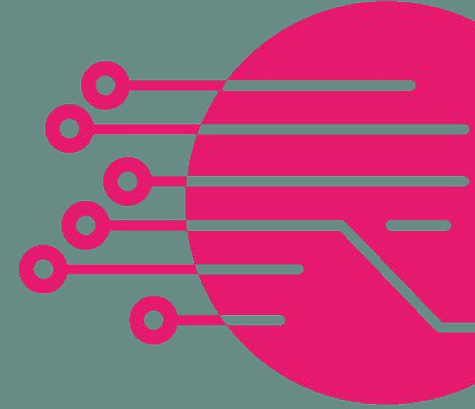


Great Customer Service and Support

The implementation team were extremely helpful and responsive to our requests. Since implementation the system has been working flawlessly.

Aerel Rankin, Sales Enablement Engineer at SunWize Power & Battery



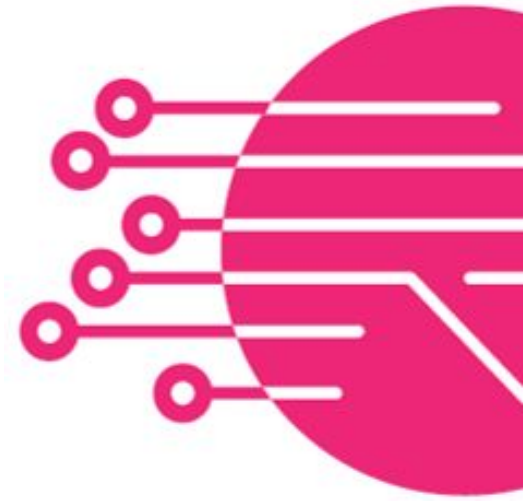


Very Professional, Excellent Service

Rapidi has helped us to set up the connection between our ERP and CRM, the service is very reliable with short response time. While we keep adding more transfers, the Rapidi specialists are professional and responsive. I highly recommend Rapidi as your system integrator.

Justin Lu, Marketing & Product Manager at Norsat International





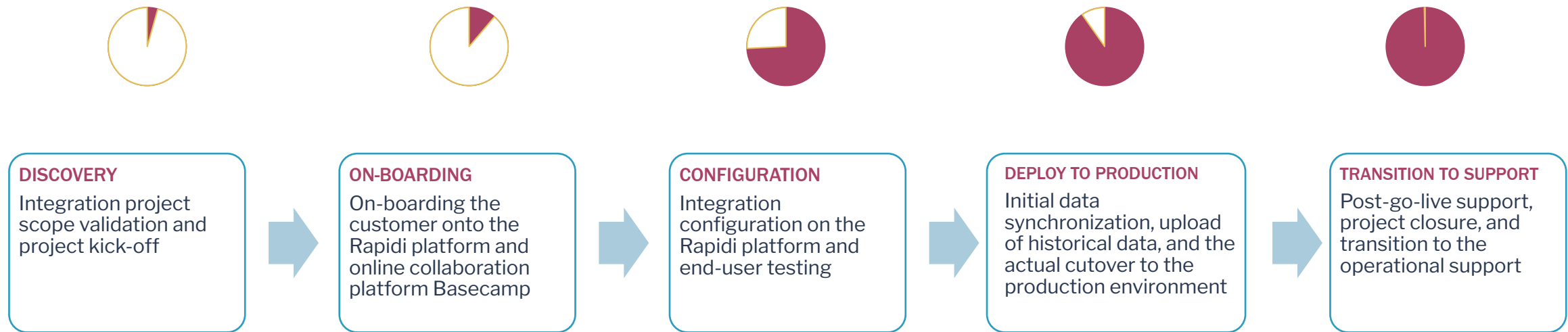
How to get started with us?

Follow & Connect



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www.rapidionline.com
MyRapidi.com/wiki

RAPIDI *Implementation* PROCESS



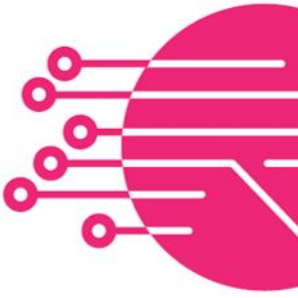


QUESTIONS ?

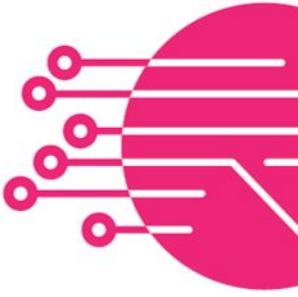
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Connect



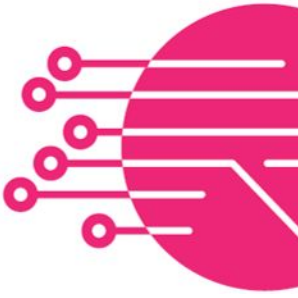
info@rapidionline.com
www.rapidionline.com
MyRapidi.com/wiki



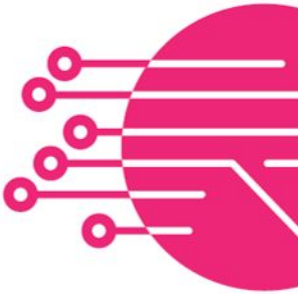
Why should we choose Rapidi integration platform instead of using other standard integration tools?



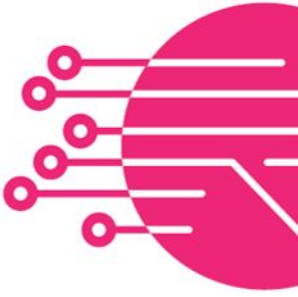
How to set up your data integration project in 3 steps?



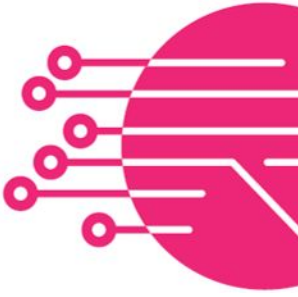
How to ensure the best data mapping?



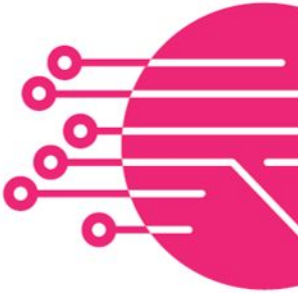
Why it's best to be prepared when handling errors?



Which systems does Rapidi support?



Do you support custom objects?

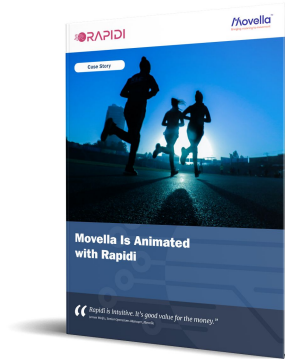


Why should we choose Rapidi integration platform instead of building integration by ourselves?

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



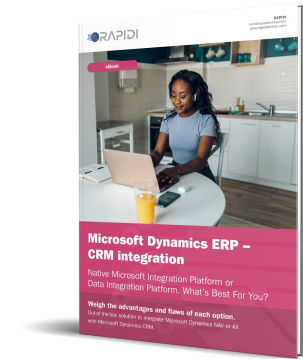
**Solution
overviews**



**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 &
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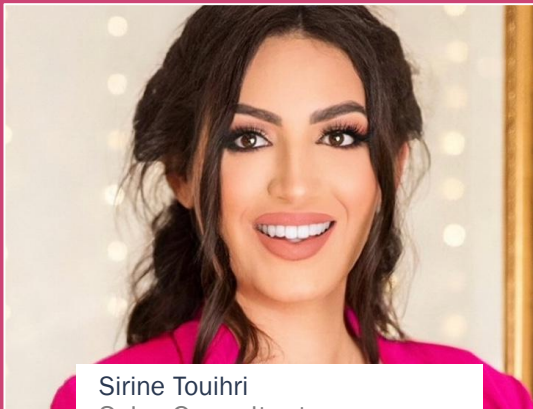


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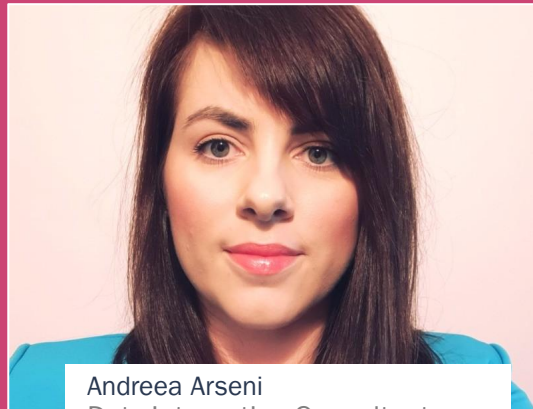


THANK YOU!

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aa@rapidionline.com

