RapidiOnline
Data Integration made *easy*

Salesforce - MS Dynamics NAV Data Integration Solution

Appexchange CERTIFIED
Appexchange PARTNER

BUSINESS NEEDS

- ✓ Flexible and cost-effective solution that easily can be adapted to your specific needs
- ✓ Automatic two-way synchronisation between Customers and Accounts
- ✓ Maintain Products and Prices in MS Dynamics NAV and get them automatically updated in salesforce.com
- ✓ Pass Opportunities from salesforce.com to MS Dynamics NAV where they automatically are created and processed
- ✓ See Sales History and Payment History on each Account in salesforce.com
- ✓ Get Mobile Access to data from MS Dynamics NAV

RapidiOnline is a Software-as-a-service that enables you seamlessly to integrate salesforce.com and MS Dynamics NAV in a simple, cost-effective and straight-forward manner. With our pre-configured service you will be up-and-running in no time.

> *We chose RapidiOnline because of their large experience with data integration and MS Dynamics NAV.*
>
> *We looked at other data integration solutions for Salesforce, but these people don't have nearly the same experience or the same deep support for integration to MS Dynamics NAV as RapidiOnline.*
>
> Peter Grandt, Online Manager at Milestone Systems A/S

RapidiOnline is a hosted data integration solution that easily integrates Salesforce with MS Dynamics NAV. We provide pre-configured standard data integration that is ready to use immediately after subscribing to our service. The configuration can easily be extended and adapted to your specific needs.
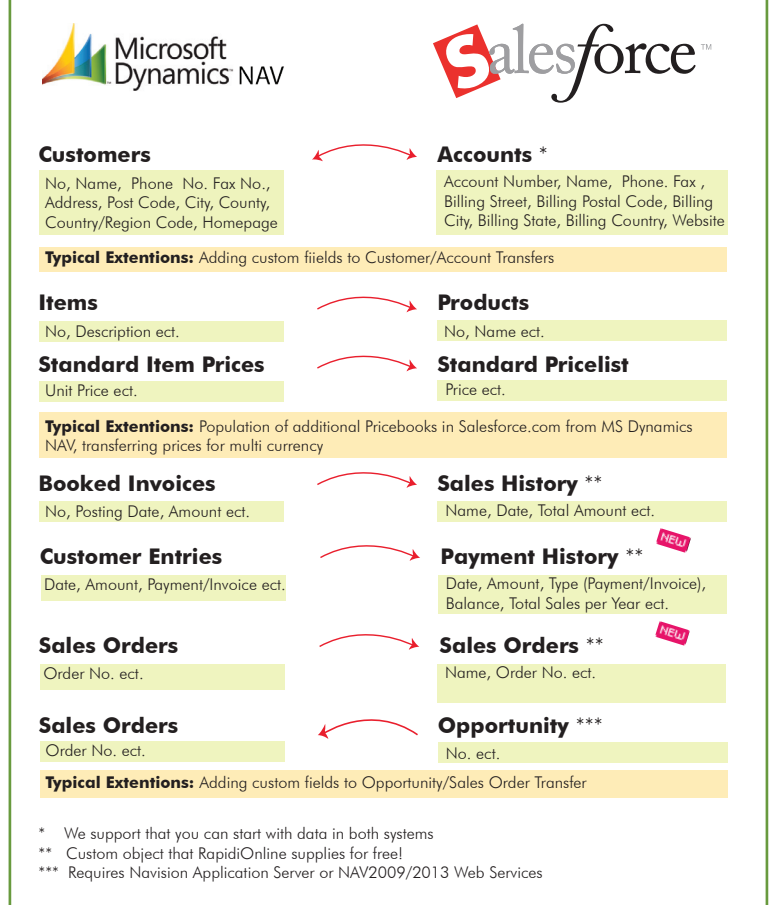
The Salesforce - MS Dynamics NAV integration is available in three different versions. You pay a fixed monthly fee and there are no extra costs for software maintenance and updates. You only pay as long as you use the service and you only pay for the functionality needed.

The integration solutions eliminate duplicated data entry and replicates data so that the users of each system benefit from up-to-date data.

The pre-configured set-up integrates Customers in MS Dynamics NAV with Accounts in salesforce.com. Updates from each system are automatically transferred to the other system.

New Customers in MS Dynamics NAV are automatically created as Accounts in salesforce.com. New Accounts of type 'customer' (can be configured) are automatically created as Customers in MS Dynamics NAV. Products and Prices are maintained in MS Dynamics NAV and automatically transferred and kept up-to-date in salesforce.com. RapidiOnline provides a free-of-charge extention for salesforce.com that enables you to see the

PRE-CONFIGURED INTEGRATION:

Microsoft Dynamics NAV   Salesforce™

Customers
No, Name, Phone No. Fax No., Address, Post Code, City, County, Country/Region Code, Homepage

⟷ **Accounts** *
Account Number, Name, Phone. Fax , Billing Street, Billing Postal Code, Billing City, Billing State, Billing Country, Website

Typical Extentions: Adding custom fiields to Customer/Account Transfers

Items
No, Description ect.

→ **Products**
No, Name ect.

Standard Item Prices
Unit Price ect.

→ **Standard Pricelist**
Price ect.

Typical Extentions: Population of additional Pricebooks in Salesforce.com from MS Dynamics NAV, transferring prices for multi currency

Booked Invoices
No, Posting Date, Amount ect.

→ **Sales History** **
Name, Date, Total Amount ect.

Customer Entries
Date, Amount, Payment/Invoice ect.

→ **Payment History** ** NEW
Date, Amount, Type (Payment/Invoice), Balance, Total Sales per Year ect.

Sales Orders
Order No. ect.

→ **Sales Orders** ** NEW
Name, Order No. ect.

Sales Orders
Order No. ect.

← **Opportunity** ***
No. ect.

Typical Extentions: Adding custom fields to Opportunity/Sales Order Transfer

*   We support that you can start with data in both systems
** Custom object that RapidiOnline supplies for free!
*** Requires Navision Application Server or NAV2009/2013 Web Services

customer's sales history and payments which is visible under each Account. Invoices and payment history is automatically transferred from MS Dynamics NAV. Your customer's Current Balance and Total Sales per year are visible directly on the Account in salesforce.com. Opportunities in salesforce.com that reach a certain stage (e.g. stage closed/won) can be automatically transferred to MS Dynamics NAV, where they are created as Sales Orders. Other objects - both standard and custom objects - can easily be added to the integration.

BENEFITS

Rapid Implementation - Pre-configured with account, product, pricelist, invoice and opportunities objects. Additional objects and fields can be configured.

Fast & Optimized Data Communication - Data is transferred in binary format, packed and compressed via the RapidiConnector. This ensures fast and secure data communication with MS Dynamics NAV. Communication with Salesforce.com is done using their Web-Service API.

Safe and Secure System - SSL encrypted data transmission without storing data outside Salesforce and MS Dynamics NAV. Any sensitive configuration data is stored encrypted only.

On Demand Solution with web 2.0 based set-up and configuration

Less Administration - We run and monitor the service for you

Fast Installation - No need for fixed IP addresses and no need to open firewall.

Access to use C/AL code (using Navision Application Server or NAV web services)

Extensive formular system to manipulate the data on the fly

FEATURES

Scheduler:
With the Built-in scheduler you can set up automatic transfers. The Schedules are run and monitored centrally on our servers.

RapidiConnector:
The RapidiConnector is installed locally close to the MS Dynamics NAV database. It facilitates the connection to the local database and reduces the total transfer time significantly by packing and compressing data sent over the internet.

Transactions Security:
To ensure the best possible security in your transfers the C/Front Module is used to access the MS Dynamics NAV database. Transaction security (Commit/Rollback) is used to ensure that either all data in MS Dynamics NAV is transferred or none at all.

Replication can be extended to include other databases or systems:
For example you can include an integration with a MS-SQL based webshop system. RapidiOnline supports a large number of different database systems such as MS-SQL, Oracle, DB/2 and MySQL.

Advanced formulas:
You can use the DBLookup formula to look up values in other tables or databases.

MS Dynamics NAV 2009/2013 Web Services:
Support for MS Dynamics NAV 2009/2013 web services.

FLEXIBILITY

Field List:
Transfer of only specific fields

Filters:
Transfer of only specific data - filtering on one ore more fields

Sub Transfers:
Transferring e.g. Sales header and corresponding sales lines in one transaction.

Tags (variables):
Sharing the same transfer for many different destinations (databases/accounts) by using tags in the transfer. The tags are substituted at run time by the Scheduler.

Mirror Technology:
Ability to create a local copy of the source data so that we can detect and transfer only the changes. The mirror technology automatically compresses data to use minimal space.

Changes only (SQL):
When MS Dynamics NAV is running based on a SQL database RapidiOnline can detect and transfer only the changed or new records based on the timestamp in the SQL tables.

NAS Connector:
Ability to use C/AL code to automatically validate data entered into MS Dynamics NAV. This feature is supported on NAV systems from 3.70 and later.

Event Triggered Transfers from MS Dynamics NAV: Ability to trigger a transfer from an event inside MS Dynamics NAV.

Event Triggered Transfers from Salesforce.com:
Ability to trigger a transfer from an event inside Salesforce.com for example as part of a workflow rule.

3 Different Versions:
Light Version: When only a few objects need to be integrated.
Standard Version: All objects can be integrated.
Advanced Version: Additional full access to Web 2.0 based configuration application.

SYSTEMS SUPPORTED

✓ **Salesforce.com**
   » Professional, Enterprise & Unlimited Edition

✓ **MS Dynamics NAV**
   » MS Dynamics NAV 2013
   » MS Dynamics NAV 2009
   » MS Dynamics NAV 5.0 & 5.0.1
   » MS Dynamics NAV 4.01, 4.02, 4.03 & 5.0
   » MBS-Navision 3.70 & 4.0
   » Older Versions also supported

Both MS SQL Server and the Native database options are supported

SYSTEM REQUIREMENTS

» C/Front Module (Module 1800) in License of MS Dynamics NAV (except if you are using MS Dynamics NAV 2013)