



## Salesforce - MS Dynamics NAV (Navision) Data Integration

### Simple and Powerful

"Using RapidiOnline has made it much easier to get started with the data integration. It has a user-friendly interface and you are up and running in no time.

RapidiOnline makes it so easy to replicate data to the Navision database. Nice people to work with too, they provide excellent support.

I highly recommend this application!"

*Christian Tyrrestrup, Consultant*

**RapidiOnline is a Software-as-a-service that enables you to seamlessly integrate Salesforce and MS Dynamics NAV (Navision) in a simple, cost-effective and straightforward manner. With our pre-configured service you will be up-and-running in no time.**

# Data Integration



## Business Issues to solve

- **The need to synchronise customers, accounts, product information between salesforce.com and e.g. MS Dynamics NAV**
- **The need to pass opportunities from salesforce.com to ERP systems where they are automatically created and processed.**
- **The need to see sales history from ERP system in salesforce.com.**

RapidiOnline is a hosted data integration solution that easily integrates Salesforce with MS Dynamics NAV (Navision). RapidiOnline provides 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 at RapidiOnline is available in 3 different versions: Light, Standard and Advanced. 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 at RapidiOnline 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 at RapidiOnline integrates account, product and pricelist information between Salesforce and MS Dynamics NAV (Navision) – easily and securely.

## Features

### **Rapid Implementation:**

Pre-configured with account, product and pricelist objects. Additional objects and fields can be configured.

### **RapidiConnector:**

Unique technology that ensures fast and secure data communication between Salesforce and MS Dynamics NAV.

### **Safe and secure:**

Direct and transaction safe data transfer without storing data outside Salesforce and MS Dynamics NAV.

### **3 Different Versions:**

Available in Light, Standard and Advanced

## Benefits

### Fastest time to market:

- Rapid Implementation: Pre-configured
- Up and running in no time!
- Configuration, no coding.
- Data Integration within days instead of months

### Lowest Costs:

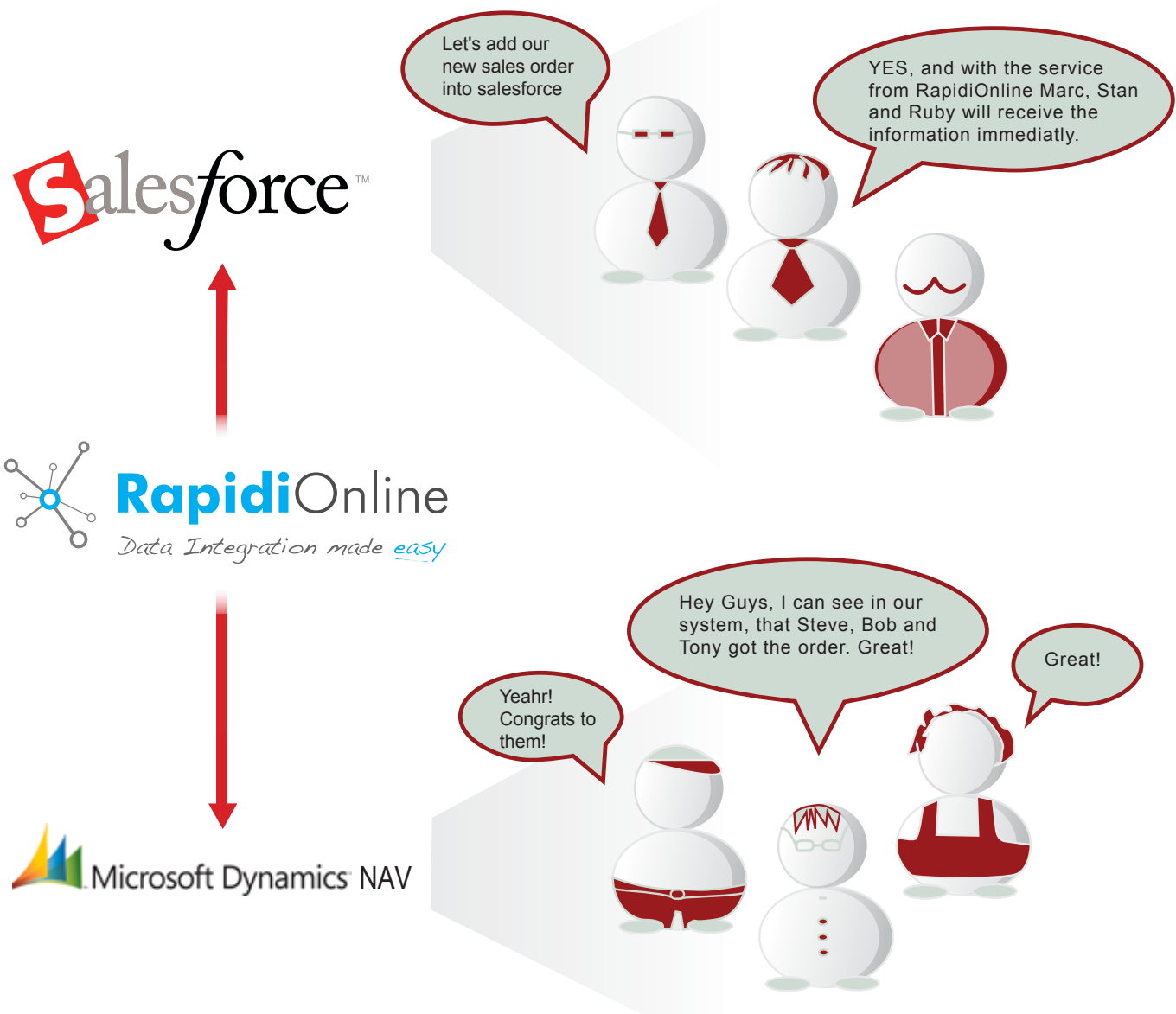
- No initial licensing costs
- Fixed monthly fee
- Fixed price for configuration
- No extra costs for software maintenance and updates
- You only pay as long as you use it
- You only pay for the functionality needed

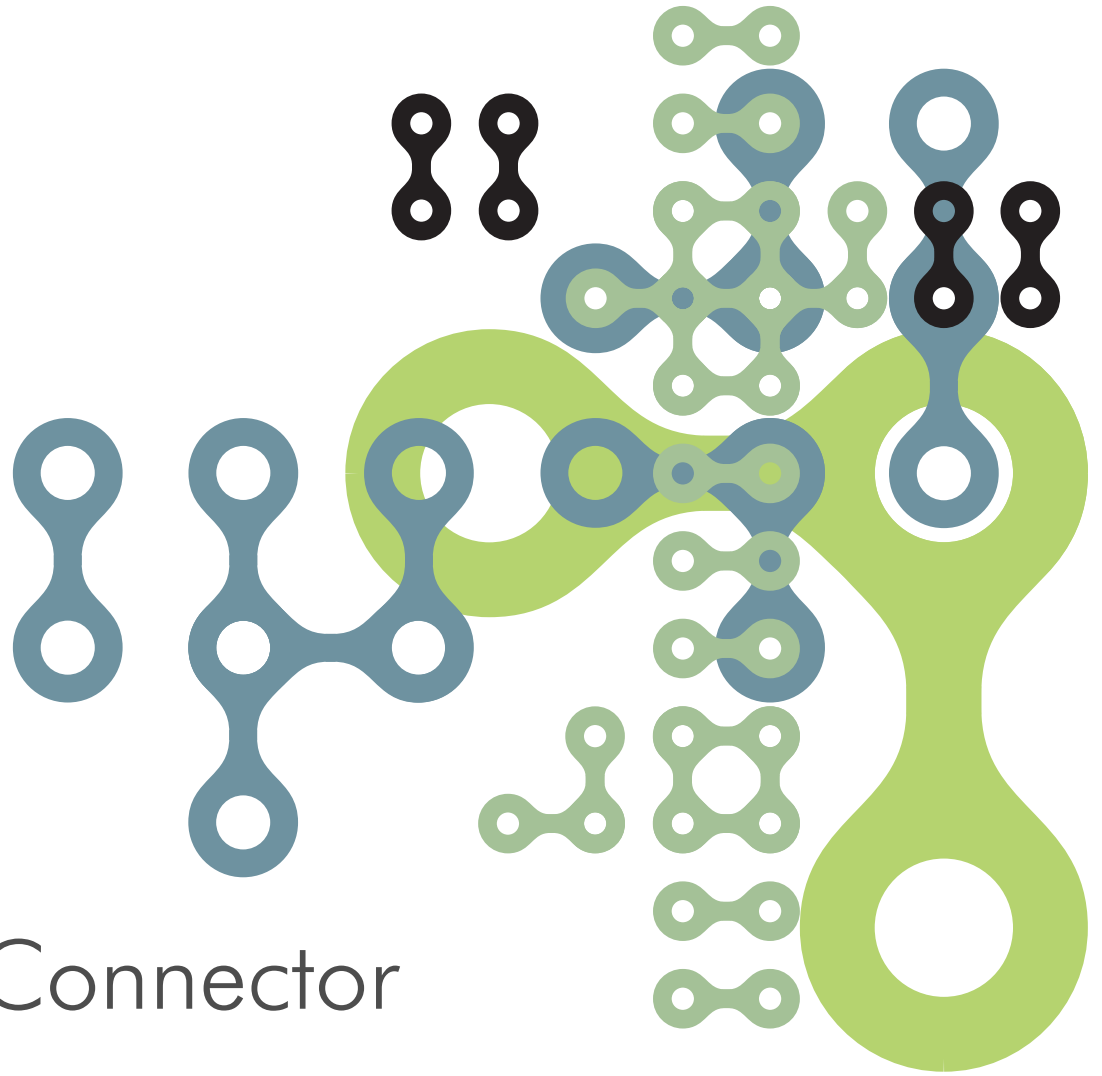
### Business Improvement:

- Always up-to-date data
- More efficient business routine
- More efficient interactions with customers
- Improved customer service
- Improved sales conversion rates
- Liberating valuable resources

### Flexible solution:

- Pre-configured integration set-up
- Easy to adapt and extend to your specific needs
- Easy to extend with custom developed objects





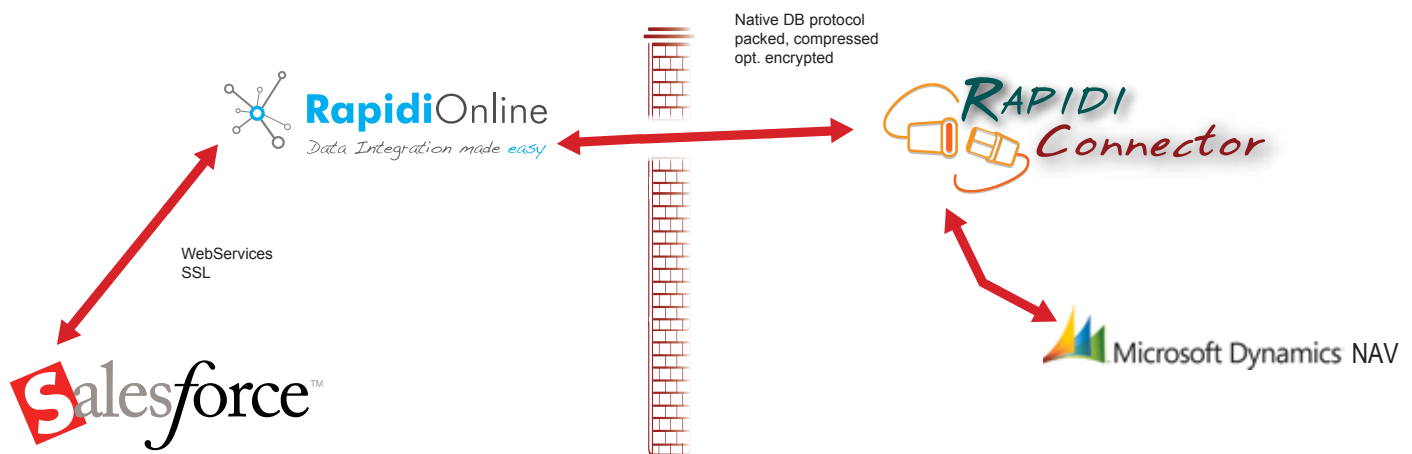
**Rapidi**Connector

# RapidiConnector

## The RapidiConnector: Communication... fast and secure

The RapidiOnline Services run with a unique technology called the RapidiConnector that ensures compressed and secure data transfer between RapidiOnline and the different On-Premise systems. For best efficiency and security the data is compressed and encrypted.

Our aim is to provide services that take advantage of this unique technology in order to make it easier and faster for you to get started. Our unique technology ensures that the On-Demand solution is working just as efficient as the On-Premise version.



## RapidiConnector: Reduced time and bandwidth

The RapidiConnector resides in your On-Premise network connecting outbound to the central RapidiOnline Service and enables two-way communication between RapidiOnline and your On-Premise systems.

This has the advantage that you don't have to change anything in your network or firewalls in order to deploy Rapidi -Online integration. The connections from the RapidiConnector are all outbound to RapidiOnline. No inbound connections are made and no inbound ports have to be opened in your firewall. Your internal systems stay secured and protected. This makes it very easy to get started.

The communication between RapidiOnline and the RapidiConnector is using a proprietary protocol which is highly efficient in terms of reducing the total amount of data and the number of packages sent and received to an absolute minimum. The protocol first joins e.g. 50 records in 1 package thereby stripping off all Meta information, so that only the relevant data is sent. Furthermore the package is compressed before sending. This results in the most efficient data transfer. This method can reduce the amount of data needed to be sent by a factor up to 50. This means e.g. instead of sending 1000 bytes for each customer record the RapidiConnector only needs to send 20 bytes. This reduces both the time and the bandwidth needed dramatically.

Because of the proprietary protocol and the compression it is practically impossible to decipher the data transmitted. This increases the security. If extra security is needed the data can also be encrypted.



## *The Service Configuration*

# The Service Configuration

RapidiOnline consists of a back end user interface, where the entire data integration set-up is configured. In the following pages you will see a sample set-up to give you an idea of how RapidiOnline works.

The screenshot shows the 'Service: Salesforce-NAV' dashboard. It includes navigation tabs for Dashboard, Configure, Run Transfers, Run Group, Schedule, and Log. The service is described as 'Integration between Salesforce and MS Dynamics NAV' with a trial expiration of 24-10-2007. The service status is 'Running on Port: 6201 (ver 3.2.30)'. It lists connected RapidConnectors: NAV40\_R - from IP address 192.168.190.3 (ver 3.2.38). Below this is a table titled 'Overview Schedules' with columns for Schedule, Last Run, Next Time, Interval, Status, and Log.

SCHEDULE	LAST RUN	NEXT TIME	INTERVAL	STATUS	LOG
ITEM1	09-02-2007 12:01	10-03-2007 08:00	10 Hours	Stopped	Log
ITEM2	09-02-2007 12:01	10-03-2007 09:00	10 Hours	Stopped	Log
CLIENT1	09-02-2007 12:01	10-03-2007 09:00	10 Hours	Stopped	Log
CLIENT2	09-02-2007 12:04	10-03-2007 09:00	10 Hours	Stopped	Log

## Dashboard

The Service Dashboard gives you an overview of the different services.

It shows e.g. the status of the service - whether it is running or not. Furthermore you can see if any schedules are overdue etc.

The screenshot shows the 'Configure' page for 'MS Dynamics NAV - Salesforce'. It is titled 'Edit MS Dynamics NAV parameters' and explains that users can change parameters to connect to their local MS Dynamics NAV (Navision) server. It shows the 'RapidConnector Status' as 'connected from IP 192.168.190.3'. A 'download' button is visible. Below, it lists five steps to follow: 1. Download RapidConnector, 2. Install and start the service, 3. Enter details (Port, UserID, Password) and verify, 4. Start the service, 5. Check connection. Parameters listed include Port number: 6201, UserID: NAV40\_R, Password: abc456ab. At the bottom, there are form fields for Code (NAV40), Description (MS Dynamics NAV), Driver (Native database/server), Server Connect (localhost), Database Path, Account (CRONUS International Ltd), and User ID.

## Configure

Here you find parameters to configure the setup in order to connect to the different systems: In order to be able to connect to your local MS Dynamics NAV server you first need to download and install a small service called the RapidConnector.

The RapidConnector must be configured with the given parameters specific to your service. The RapidConnector will connect to RapidiOnline's central service and keep that connection open.

The connection will then be used to transfer data between your local database and other systems.

Dashboard **Configure** Run Transfers Run Group Schedule Log

MS Dynamics NAV Salesforce

### Edit Salesforce.com Connection parameters

Here you can change the connection parameters for your Salesforce connection.

Please note that the User ID entered below must have access to all data that you want to read/write.

Code: SFORCE

Description \*  
Salesforce

User ID \*  
mb@mpiconline.com

Password *used only for testing the connection - password is not saved*  
[password field]

Use SSL

## Configure (cont.)

Under "Configure Salesforce" you need to put in the parameters in order to connect to salesforce.com

Dashboard **Configure** Run Transfers Run Group Schedule Log

### Run Transfer

Here you can view Transfers or run a Transfer manually

Selectforce Password \*  
[password field]

ACTION	CODE	DESCRIPTION	SOURCE	DESTINATION	ENABLED	LOG	RTI		
			SF01	Nav Item -> SForce Product2	NAV40	SFORCE	Yes	Log	RTI
			SF02	Nav Item -> SForce Std. PricebookEntry	NAV40	SFORCE	Yes	Log	RTI
			SF10	Nav Customer -> SForce Account	NAV40	SFORCE	Yes	Log	RTI
			SF11	SForce Account -> Nav. Customer Lpd.	SFORCE	NAV40	Yes	Log	RTI

**Messages output from transfer:**

Transfer SF10 started - please use the button above to get messages from the Transfer.

Transfer thread initializing.  
Starting transfer Nav Customer -> SForce Account.  
Transfer is now executing.

Nav Customer -> SForce Account OK. (00:00:02)  
8 Records read from Source.  
0 Records Updated.  
0 Records Added.  
0 Records Deleted.  
Transfer committing.  
Transfer ending.  
Transfer finished.

## Run transfer

The "Run Transfer" tab shows a the complete list of transfers you can specifically run, edit and delete by clicking the specific icons.

When running a specific transfer the message window below the list will give you the need feedback.

ACTION	CODE	DESCRIPTION	SOURCE	DESTINATION	ENABLED	LOG	RTI		
			SF01	Nav Item -> SForce Product2	NAV40	SFORCE	Yes	Log	RTI
			SF02	Nav Item -> SForce Std. PricebookEntry	NAV40	SFORCE	Yes	Log	RTI
			SF10	Nav Customer -> SForce Account	NAV40	SFORCE	Yes	Log	RTI
			SF11	SForce Account -> Nav. Customer Lpd.	SFORCE	NAV40	Yes	Log	RTI

## Edit Transfer

You can run, edit and delete all transfers.

Dashboard **Configure** Run Transfers Run Group Schedule Log

### Edit Transfer

Code \*  
SF10

Description \*  
Nav Customer -> SForce Account

Group  
SYNC

Source \*  
NAV40

Destination \*  
SFORCE

Source Table \*  
Customer

Destination Table \*  
Account

Enabled

Update  
 Add  
 Delete  
 Actions  
 Move  
 DeleteAll

Auto-Generate Key  
 Disable Dest. Lookup

▶ Source Control  
▶ Actions  
▶ Triggers  
▶ Special Setup (Latius Notes only)



## Transfer SF10

Nav Customer -> SForce Account

10 5 3 of 4 2 21

back
 edit
 delete
 run

### General Information

CODE	SF10	ENABLED	Yes
DESCRIPTION	Nav Customer -> SForce Account	UPDATE	Yes
GROUP	SYNC	ADD	Yes
SOURCE	NAV40	DELETE	
DESTINATION	SFORCE	ACTIONS	
SOURCE TABLE	Customer	MOVE	
DESTINATION TABLE	Account	DELETE ALL	
ALL FIELDS	Yes	AUTO GENERATE KEY	
		DISABLE BEST LOOKUP	

- ▶ Source Control
- ▶ Actions
- ▶ Triggers
- ▶ Special Setup (Lotus Notes only)

### Table Link (Key Fields) - [1]

SOURCE FIELD	DESTINATION FIELD
No.	AccountNumber

### Field List (mapping) - [10]

edit

SOURCE FIELD	DESTINATION FIELD
No.	AccountNumber
Name	Name
Phone No.	Phone
Fax No.	Fax
Address	BillingStreet
Post Code	BillingPostalCode
City	BillingCity
Country Code	BillingCountry
Home Page	Website
##F(BLOCK,TR,Year)	Active__c

- ▶ Sorting Source Table - [0]
- ▶ Sorting Destination Table - [0]
- ▶ Filters Source (definitions) - [1]
- ▶ Filters Destination (definitions) - [0]
- ▶ Default Values - [0]
- ▶ Conversion (list of from-to values to convert) - [0]
- ▶ Attributes Source - [0]
- ▶ Attributes Destination - [0]
- ▶ Scatter (one record to many records) - [0]
- ▶ Gather (many records to one record) - [0]
- ▶ SubTransfer - [0]

10 5 3 of 4 2 21

## Show transfer

Clicking on each single transfer you can see all the details, such as the general information, source control, table links (key fields), fieldlist (mapping) etc.

You can edit and copy an existing transfer, edit fieldlist and numerous of other information.



## Run Group

The “Run Group” tab shows a the complete list of group of transfers which you can run, edit and delete by clicking the specific icons.

When running a specific transfer the message window below the list will give you the need feedback.



## Schedule

The “Schedule” tab shows a complete list of schedules.



## Log

The “Log” tab shows the log list of each transfer.

You can click on each log to get into details.

## About RapidiOnline

RapidiOnline provides agile data exchange and data integration solutions - delivered both as on-demand or on-premise solutions. Our mission is to revolutionise how the world engages and deals with their data and systems – transforming data integration from a complex to a simple task.

Since 1987 RapidiOnline’s products have delivered value with a compelling combination of performance, flexibility and reliability. RapidiOnline has customers worldwide, that rely on us to manage and integrate their critical data. RapidiOnline is based in Denmark and France. Sign Up for a Trial already today!

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**RapidiOnline** - *Data Integration made easy*

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