

Solution overview

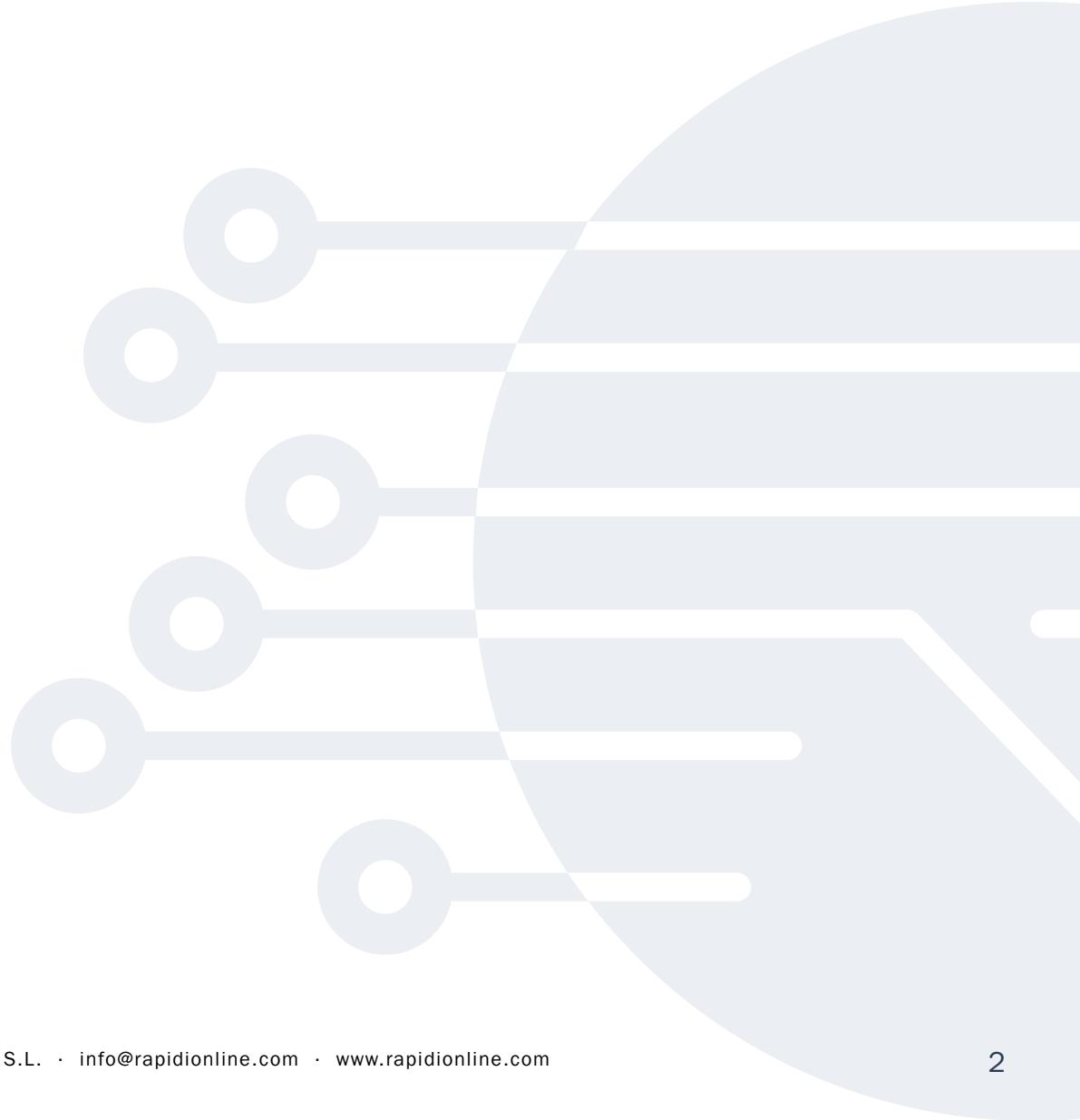


Integration **SALESFORCE and MICROSOFT DYNAMICS 365**

Overview of Rapidi solution

Table of Contents

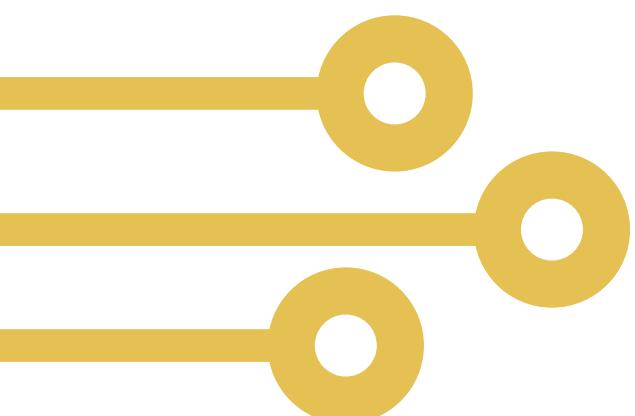
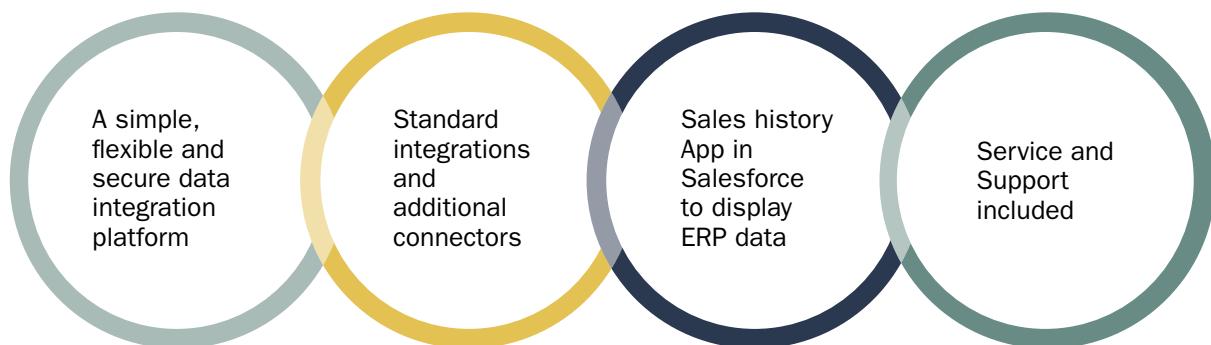
| | |
|---|----|
| 1. What is RapiDi? | 3 |
| 2. What is the RapiDiConnector? | 9 |
| 3. What can I do with RapiDi? | 10 |
| 4. The advantages of our pre-configured integration solution | 15 |
| 5. Sales history App Extension for Salesforce | 18 |
| 6. What Salesforce and Microsoft Dynamics 365 Systems does RapiDi support? | 20 |



1. What is Rapidi?

At Rapidi, we believe you shouldn't need to feel the pain of lost productivity hours or experience the headache of thinking about where to start your data integration when you use our solution – Rapidi. Our years of knowledge and expertise have culminated in a product that is simple, fast yet flexible, robust and secure.

The multi-fold benefits of Rapidi



Who would believe that integrating an ERP and CRM system would be that straight forward? Gone are the days with programming. Rapidi is a strong integration platform with a flexible setup and user-friendly interface.

Theis De Mik, CRM Manager, BDO AS

Simple

Rapidi is an innovative software product that is three-fold in its simplicity; in design, installation and use.

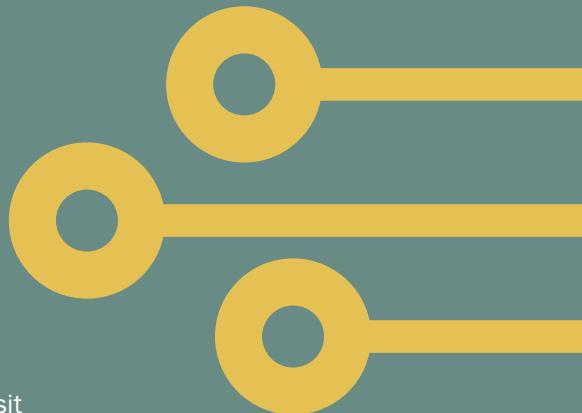
It is a cloud integration system that comes out of the box with pre-configured templates allowing you to quickly integrate various systems, for example Salesforce and Microsoft Dynamics. We've designed it to specifically enable direct integration so your data will never get stuck in-between your two systems. You'll always know exactly where your data is located, plus you can be confident in trusting the integrity of your data.

Installation is easy with just a few clicks, even for advanced setups. We have taken care to simplify our integration product – which features our RapidiConnector – and no programming is required even if you want to extend your Salesforce or Microsoft Dynamics with add-on solutions or customizations.

Once Rapidi is up and running, the system is intuitive and simple to use. Our current customers have consistently rated Rapidi highly for its simplicity in design and usability on Salesforce AppExchange.

We also offer simplicity in getting help when you need it as you can choose what suits you best:

- visit our resource page with links to set up guides & our highly informative [blog](#)
- visit our dedicated [MyRapidi wiki](#) with technical downloads & documentation to guide you every step of the way
- raise a support ticket from within the product itself – no need to visit an external support site



If you prefer to use an in-house data integration expert – then you have one in us! Wherever you are, whenever you need us, we will be there to support you.

Fast yet flexible

Our technology supports fast implementation as Rapidi is a cloud integration system so all configurations happen online. We don't need to apply any additional code or programming to Salesforce or Microsoft Dynamics to perform your integration, even if you want to extend the product's capabilities with customizations.

Rapidi is fully adaptable to integrate with many other systems and databases apart from Salesforce and Microsoft Dynamics such as Oracle, Microsoft SQL, MySQL, IBM DB2 and others. We also support a number of different types of generic interface technologies such as REST, SOAP. All this means there's little to no future upgrade costs and maintaining Rapidi is easy and stress-free.

We also offer flexibility in setup and function. Choose to use a fixed 'out-of-the-box' configuration or tweak it to meet your specific needs. With our built-in scheduler, transfers can be set to run whenever you like either automatically or manually; you choose what suits you best.

Rapidi can also easily meet different company needs, whether you're a large corporate with complex systems or a small startup with limited customer data consolidation needs.



Robust and secure

In today's cyber-world, maintaining the integrity of your data while it's being integrated is paramount. And we've used our 20+ years of experience to ensure Rapidi does just that.

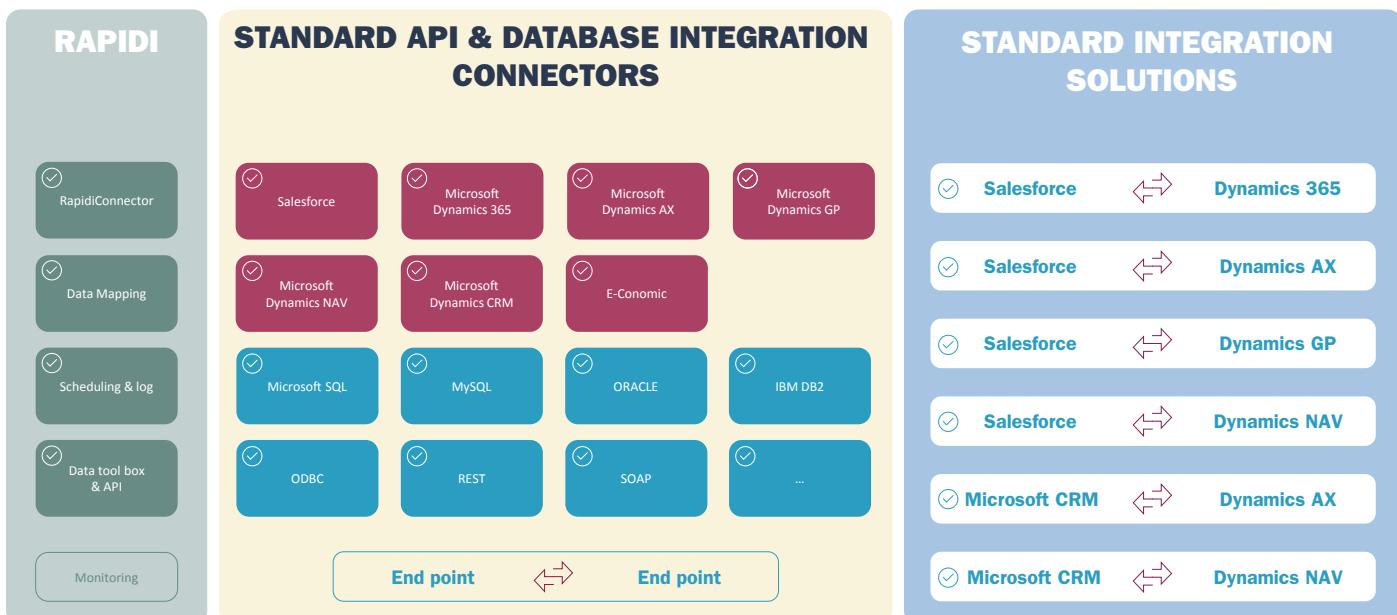
When you use Rapidi, your systems are never exposed to the outside world so hackers cannot gain access. Our service runs via the RapidiConnector, a unique technology that ensures data communication between Rapidi and your on-site systems is not compromised. The RapidiConnector resides in your network and automatically compresses and SSL encrypts data before transferring, making it practically impossible to decipher. If you require an extra level of security, we can use your own SSL certificate.

All transmissions via the internet are SSL encrypted (our encryption follows the newest TLS standards, currently TLS 1.1, TLS 1.2 and TLS 1.3) and all data is processed end-point to end-point in memory directly, with no intermediate storage. No customer data is stored on any Rapidi server. Any sensitive configuration data is stored only an encrypted-basis.

Rapidi is designed according to the latest certification standards. We have multiple professional certifications; as an application development partner for Microsoft and as an AppExchange partner for Salesforce. We continually ensure we are updated about Salesforce's new requirements and comply with all new security standards. These updates and upgrades extend to supporting future versions of Salesforce, Salesforce API and Microsoft Dynamics.

As a further backup, we always monitor your system setup and even provide pro-active support if we identify anything that may jeopardize your data and/or transfers. We quickly spot any type of interruption – for example, if your server is not responding, or if you are trying to exchange invalid data – then we log the incident and immediately notify you.

An in-depth guide to key Rapidi features



Quick facts about our Rapiди solution

| FEATURE | DESCRIPTION |
|--|--|
| Data transfer | Data is SSL encrypted and transferred in binary format, packed and compressed by the RapiдиConnector. This ensures fast and secure data communication. |
| Salesforce API and access | <p>Rapiди is Salesforce certified and communication with Salesforce is done using the Salesforce Web services API. The certification enables you to integrate Salesforce Professional edition without having to purchase Salesforce API access.</p> <p>UPsert</p> <p>Rapiди can be setup to use UPSERT when processing data to SFDC, enabling it to process 200 records with one API call instead of 1 call per record getting the maximum out of the API calls available in your Salesforce subscription.</p> |
| Microsoft Dynamics 365 API and access | <p>When we write to Microsoft Dynamics 365, we use Microsoft Dynamics 365 Web Services or OData. Rapiди supports both reading and writing of data (insert and update) using Odata. We can also read data directly from the Microsoft Dynamics 365 SQL database which is usually much faster if the database is on-premise or on Microsoft Azure. Rapiди connects as a native client when possible. For example, with Microsoft SQL we connect as a Microsoft SQL client providing full transaction control, access permission handled on normal user level on the server and full-blown SQL filter syntax including Select In, JOINS, etc.</p> |
| Security | Rapiди is Salesforce App Exchange Partner certified. All transmissions via the internet are SSL encrypted (our encryption follows the newest TLS standards, currently TLS 1.1, TLS 1.2 and TLS 1.3) and all data is processed end-point to end-point in memory directly, with no intermediate storage. No customer data is stored on any Rapiди server. Any sensitive configuration data is only stored on an encrypted-basis. |
| SaaS solution | Web 2.0 based setup and configuration. Because the Rapiди solution runs as a service it's always monitored and up to date. |
| IP address and Firewall | Fast installation with no need for fixed IP addresses and no need to open any inbound ports on your firewall (see RapiдиConnector) |
| RapiдиConnector | Connects Microsoft Dynamics 365 with your Rapiди service and compress, packs and SSL encrypts data before it's sent in an optimized binary format for maximum performance. |
| Read design | With one click we read the database design which makes all tables and fields (incl. metadata) available for the data mapping. |
| Data mapping | <p>Field list: Transfer only specific fields</p> <p>Filters: Transfer only specific data within the filter</p> <p>Sub Transfers: e.g. Sales Header and Lines in one transaction</p> <p>Tags: Reuse an existing mapping</p> |

Quick facts about our RAPIDI solution

(continued)

| FEATURE | DESCRIPTION |
|------------------------------------|---|
| StoreNewID | StoreNewID captures the destination assigned key when adding a new record and writes it back to a field in the source record to link the systems together in an optimal way, e.g. when adding a new Customer to Microsoft Dynamics 365 from a Salesforce Account, the Customer No. assigned in Microsoft Dynamics 365 can be written back to the Salesforce Account Record in the same transaction. |
| New or modified data only | <p>Changes only: When running on databases with timestamps on the tables.</p> <p>Mirror: A RAPIDI technology to transfer only new or modified data if timestamps are not available in the database.</p> |
| Schedule transfer frequency | <p>Transfers can be set according to your subscription level. The intervals are daily, hourly, 10 minutes, 1 minute, triggered.</p> <p>Within your subscription rights, you can define a specific schedule (group of transfers) to tune with a certain interval. You can create unlimited schedules and transfers.</p> |
| Advanced data toolbox | RAPIDI has a 'no programming' approach. However it can be convenient to align data with different formats, structures etc. For that purpose the Advanced data toolbox offers a comprehensive Excel-syntax like formulas to align data formats and field structures. Ready-to-use formulas are included in the pre-configured standard templates. |
| Schedules | A schedule runs a group of transfers. On a schedule you can define the order in which transfers run, the frequency, notification rules etc. |
| Log & notification | RAPIDI saves detailed information (no customer data) about the run of schedules and transfers. In the event of an error (e.g. invalid source data or if the internet connection is down), RAPIDI will generate an error. You can set up criteria on how and when you get notified by e-mail with the error message and a direct link to the error. |
| Additional connectors | The RAPIDI Platform offers a long list of alternative connectors: Salesforce – Microsoft Dynamics (365, AX, GP, NAV, CRM) – Microsoft SQL – MySQL – ORACLE – IBM DB 2 – Lotus Notes – REST – SOAP – ODBC. Data can be transferred between any of the connectors that we support for example Salesforce → Oracle, MySQL → IBM DB2, etc. |

2. What is the RAPIDIConnector?

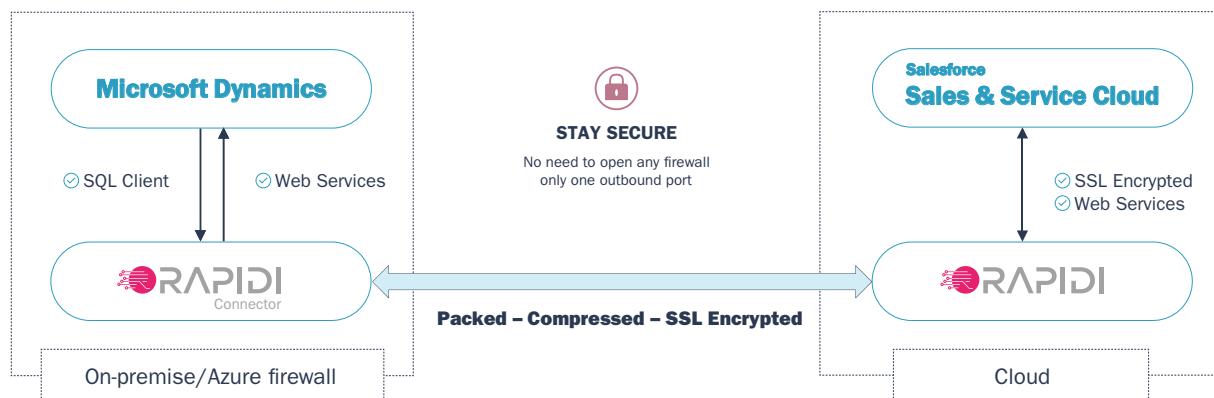
RAPIDI and the RAPIDIConnector work in harmony to perform your data integration.

Secure & encrypted communication

The RAPIDIConnector is a unique technology that ensures data communication between RAPIDI and your on-site systems is secure. It resides in your network and automatically compresses and SSL encrypts data before transferring, making it practically impossible to decipher.

Straight-forward deployment

Besides opening one outbound port, you don't need to change anything in your network or firewalls to deploy RAPIDI and the RAPIDIConnector. No inbound ports need to open in your firewall. This ensures the highest level of security and also makes it very easy to get started.



Optimized & most efficient data transfer

We use a proprietary protocol to enable communication between RAPIDI and the RAPIDIConnector. This is highly efficient in reducing the amount of data and number of packages sent and received. The protocol first strips all meta information and then sends just the relevant data in a binary format. Furthermore, the package is compressed before sending, resulting in the most optimal rate of data transfer.

This method can reduce the amount of data sent by a factor of up to 50. For example, instead of sending 1000 bytes for each customer record, the RAPIDIConnector only needs to send 20 bytes. This dramatically reduces both the transfer time and bandwidth needed.

3. What can I do with Rapidi?

The 8 most common integrations between Salesforce and Microsoft Dynamics 365

1. Account – Customer

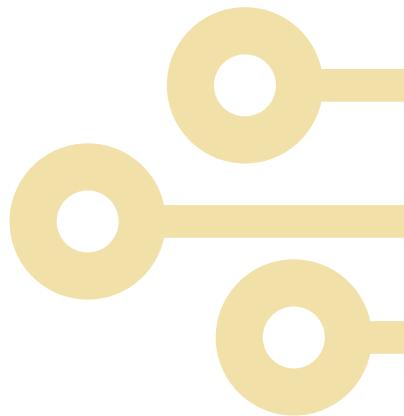
The most common driver for a Salesforce – Microsoft Dynamics 365 integration is the need to optimize your Quote in Salesforce to a sales order in Microsoft Dynamics 365. To process an order, you first need your customer data transferred because the order is linked to that customer. The logical thing to do is then to integrate customers from Salesforce to Microsoft Dynamics 365 because a customer account will typically originate from a lead in Salesforce. But that's not always the case. If so, we can implement a customer integration that is bi-directional, for example, both the sales and financial division of your organization can maintain the customer information. Doing it this way eliminates conflicts between sales and finance about whose task it is to update the account in the other system.

2. Contact – Contact

It may be a little funny to list this as one of the common data integration transfers as in most Microsoft Dynamics 365 solutions, a main finance contact is the only thing needed. There are, of course, many other good reasons to integrate contact data, but in most cases, the contacts integration is limited. A deciding factor in this type of integration comes down to the fact that contact data is typically 'master data' and is the most difficult to maintain as people switch position, employer or even name. A good principle to abide by is you should never transfer data you do not implicitly trust.

I realized that the Rapidi Salesforce – Microsoft Dynamics integration service was the missing link to make Salesforce.com viable for us. Having Rapidi linking our Microsoft Dynamics and Salesforce.com together I'm able to see sales related data such as my account, contact and invoice data in different reports and dashboards, which gives me a quick overview of how my business is performing.

Sasha Rose Managing Director, Derek Rose



3. Product – Item

If your business primarily sells products and you want to create quotes from your Salesforce system, then you need to ensure your product information is available in that system. Furthermore, if you want to support a Quote to Sales Order process, then this data must also be consistently maintained in both systems.

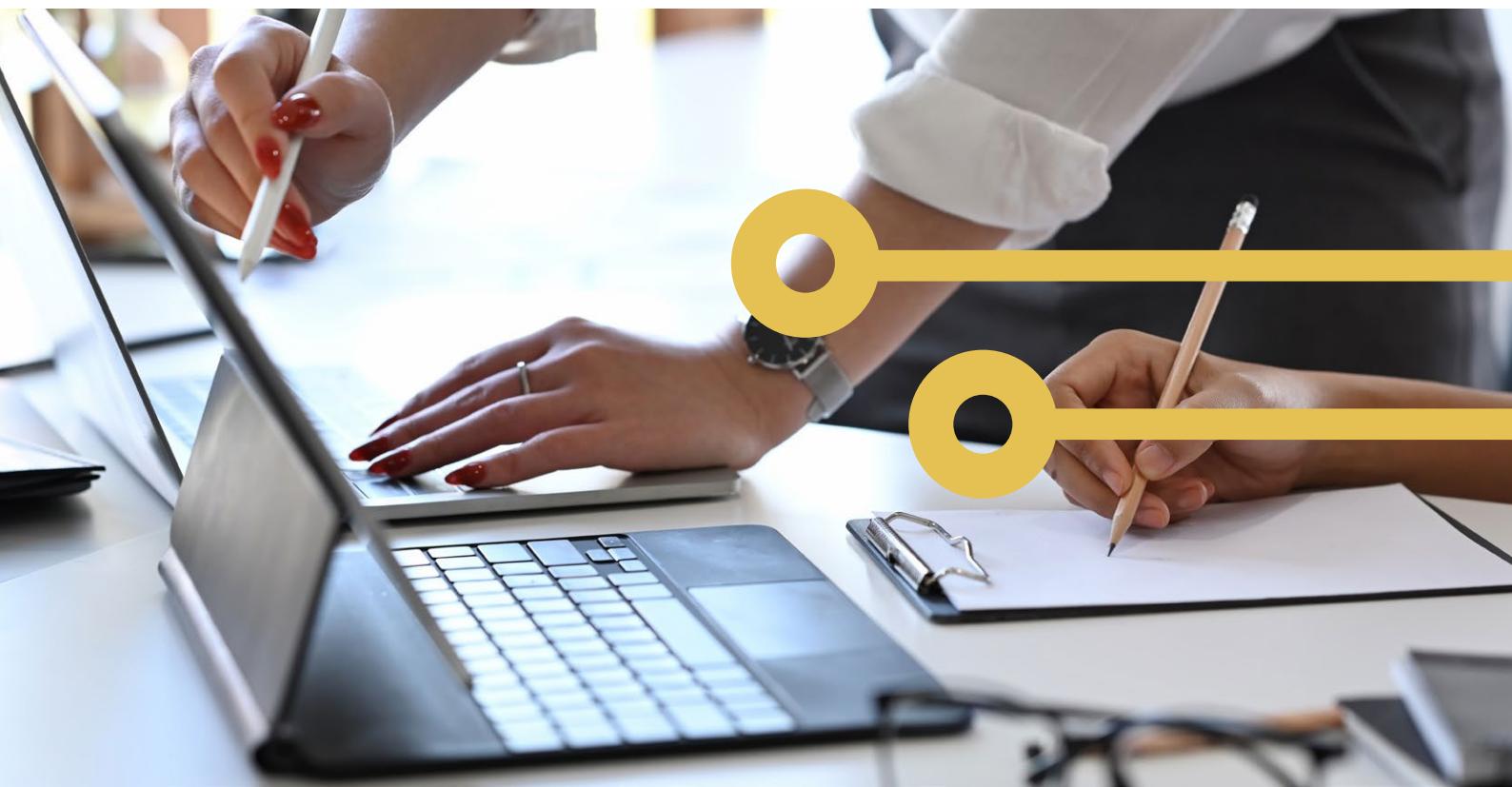
The terms 'Products' and 'Items' are a good example of how different naming in different systems can create doubts about whether you are mapping the correct fields. Very often, the data labels have different names, so it requires insight into both systems to perform an accurate map.

It is however, fairly easy to integrate 'Products' and 'Items', and the integration can be one way or bi-directional depending on your business process for creating new items.

NOTE: you will be in a better position if you avoid creating redundant data between your systems manually. It's much easier to create new records (for example, items) via the integration. This way, the link between the two records is created from the beginning, and no additional work is needed.

4. Item price – Product price

Salesforce and Microsoft Dynamics 365 have different pricing and discounting models so at a first glance, it may not seem easy to integrate them. But it is fairly straightforward and once you have a method in place, you can replicate and reuse it for future integrations. For example, at Rapidi, we've done a lot of Salesforce – Microsoft Dynamics 365 integrations where the pricing in Microsoft Dynamics 365 and the discount models have been converted into price books and in many cases, also include the currency dimension.



5. Quote – Order

Many companies create a quote in their Microsoft Dynamics 365 system and then manually enter the totals in their Salesforce system. When the quote becomes an order, they then just convert the quote to a sales order in Microsoft Dynamics 365, and then manually update Salesforce. It's a workaround that is fairly simple and flexible.

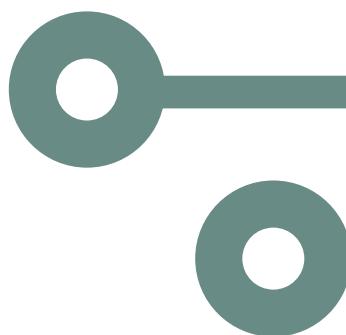
However, there is a downside to this. In this scenario, you don't have the final details in Salesforce and the sales person then has to operate multiple systems throughout the day to collect the information needed to perform the sales process. This is not optimal.

Another downside is you can't combine statistics, such as sales of specific products related to specific activities. The solution for this has been to build a data warehouse as a separate system and load data from Salesforce and Microsoft Dynamics 365 into it. While it's hard for us to claim data integration can completely eliminate the need for data warehouses, to a large extent, you will be able to make all the required reports directly from your Salesforce system, with updated data, and at lower costs.

The best part of a robust integration is the sales organization only works with your Salesforce system. They don't need to touch your Microsoft Dynamics 365 system. This transforms the perception of your Salesforce system from being a supporting tool to being the sales operating system. This results in efficiency and cost gains as you don't have to buy the sales user license for both systems.

For more complex sales processes, it's fairly common to employ an add-on solution. They exist both for both Microsoft Dynamics 365 and Salesforce, but it is best to maintain a strict process around this so you only perform product configuration in one system. Otherwise it will be very difficult to replicate the exact systems behavior and algorithms.

You can have a product configurator in Microsoft Dynamics 365 and a simplified guided selling system in Salesforce. In these cases, there are two alternatives to integrating to the Microsoft Dynamics 365 Sales order. Either the additional Salesforce sales app updates a standard quote on a sales prospect, or the integration can be switched from the quote module to the other module. Both work equally well and the best fit will be determined by what suits your business process and reporting requirements best.



6. Sales order – Sales order

This process is often forgotten when thinking about data integrations. Once the quote is transferred from Salesforce to a sales order in Microsoft Dynamics 365, the sales order should be synced back to Salesforce in order to maintain a full picture on the account /opportunity.

Another element in the integration is to continually synchronize the order if there are changes to it. For example, it can be the customer changing the order, part delivery, part invoicing or replacement of one product with another. You should also be aware that some of Microsoft's embedded standard integrations (e.g. between Microsoft Dynamics CRM and 365) do not support this and are therefore of limited value.

NOTE: the synchronization can be one direction or bi-directional depending on your business needs and processes.

7. Sales history (invoices and credit memos)

Sales history is always on the list of integrations because of the value of information. In a system like Salesforce that has supporting Artificial Intelligence, sales history is a valuable asset for charting predictive actions. Sales history is captured by transferring booked invoices from Microsoft Dynamics 365 to Salesforce. To get the full picture you will also need to include credit memos.

In Microsoft Dynamics 365, an invoice contains an invoice header and invoice lines, so when you transfer it between the systems, you are actually transferring multiple tables. We recommend transferring all details as the effort is basically the same.

To get the most out of your sales history, you can link the information to the related tables in Salesforce. Of course the customer is linked to the account, but the items on the order item line should also be linked to the items table to enable better reporting and drill down facilities in Salesforce.

In Salesforce, you can create additional roll up summary fields based on the sales history records so you don't have to pull a report to see summarized information such as total sales FY.

8. Payments

To complete the quote to cash process, we recommend transferring payments (via ledger entries) as well. It gives additional information that is often hard to get such as payment patterns, overdue amounts etc. directly on a prospect or account in Salesforce. Besides being valuable information to the sales organization, it can also help your cash collection and be used as a negotiation parameter for new deals with the customer.

Payments can be linked to the exact invoice/prospect/account etc. in Salesforce, which activates the use of payment information and source statistic reports.

Addressing the needs of international and multi-site companies

Rapidi can be used to synchronize just two systems or support more complex system environments such as those with distributed databases across multiple sites, both locally and internationally.

A typical example scenario is when you want to consolidate several ERP instances into one global CRM system. Another is when you want to synchronize master data (such as items, pricing, dimensional setup, etc) to ensure your entire organization operates using the same perfectly synchronized master data.

Some key reasons why our solution can easily do this:

- Rapidi is an open platform, designed to integrate many different systems and databases, so you can quickly consolidate data from multiple databases and keep all your systems in sync.
- Rapidi is robust and secure so you can be confident your data will remain protected.
- On the technical side, if you are running on an infrastructure where all your domains are not configured as trusted domains, Rapidi will still run unaffected, making it easy for you to integrate new sites or companies.
- All of this is done without adding any code to your systems which saves you time and money and reduces upgrading efforts.
- Rapidi is committed to supporting all future versions of Microsoft Dynamics 365 and Salesforce so you'll never be left out in the cold when it comes to upgrading.

4. The advantages of our pre-configured integration solution

Rapidi's pre-configured standard integration and 'no programming' approach offer you two distinct advantages:

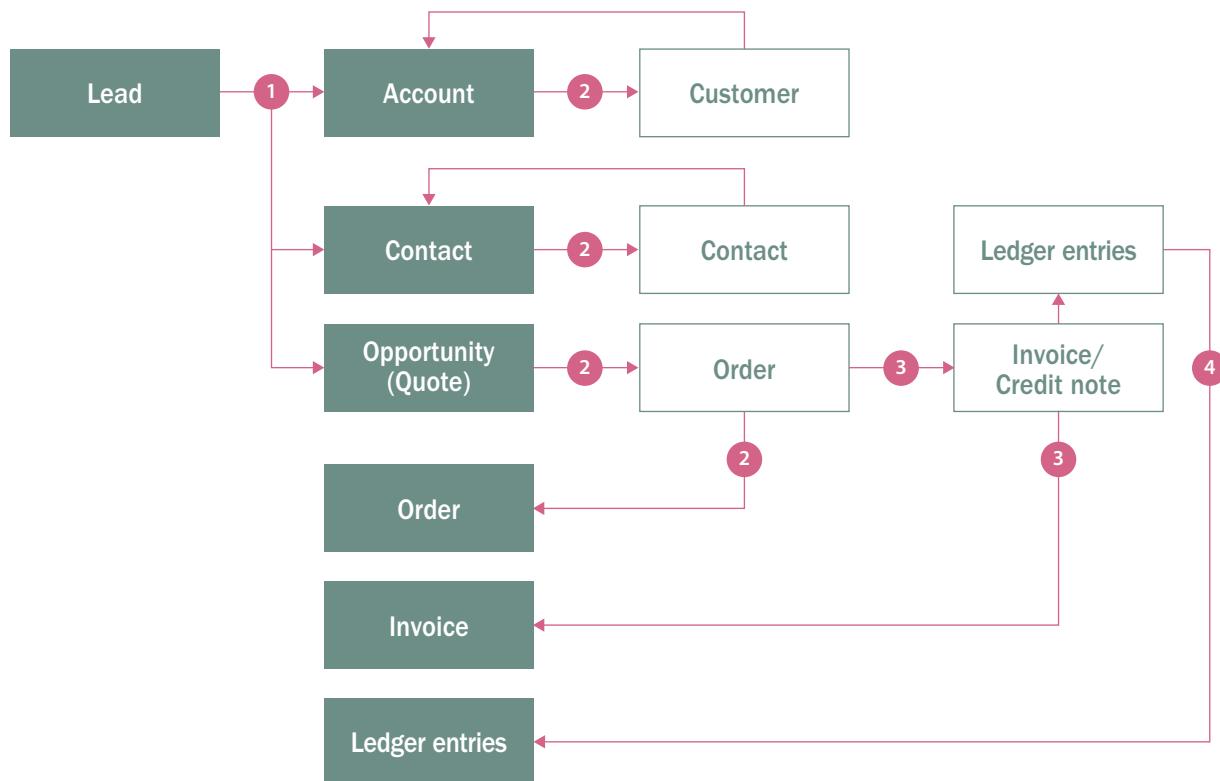
1. It's fast and easy to implement your Salesforce – Microsoft Dynamics 365 integration.
2. You can quickly and simply make changes to your integration when needed i.e. add new tables or fields.

An example of a typical integration using pre-configured tables & fields

| Salesforce | Microsoft Dynamics 365 |
|---------------|-------------------------|
| Accounts | ↔ |
| Contacts | ↔ |
| Products | ← |
| Prices | ← |
| Opportunities | → |
| Orders | ← |
| Payments | ← |
| Sales History | ← |
| | Customers |
| | Contacts |
| | Products |
| | Prices |
| | Orders |
| | Orders |
| | Ledger Entries |
| | Invoices & Credit Notes |

The illustration above is indicative of a typical case. However, your integration doesn't have to work the same way. Rapidi is functionally rich enough to handle even complex cases in a very simple way. You can decide whether your integration for each table is bi-directional or just in one direction. You can set specific rules related to specific events on a record to determine what happens with your data.

Our pre-configured templates have been mapped based on the most commonly used fields from our past experience and best practices. However, you can easily add a customized table or field to your integration within minutes. We encourage you to take advantage of all of your data and utilize its full scope to help you improve your customer service and company's bottomline.



NOTE: In the image above, the green boxes represent Salesforce and the white boxes represent Dynamics 365.

Let's say your company receives a lead. The lead is created in Salesforce. As the sales process moves along, the lead in Salesforce is converted to an account, a contact, and an opportunity. This is standard when using the Salesforce Sales Cloud. At a trigger point – for instance when the first quote is accepted – a transfer in Rapidi will create a customer, a contact and the order in the company's Microsoft Dynamics 365. The integration will also secure that moving forward and the record will stay in sync.

As there is now an open sales order in Microsoft Dynamics 365, the sales order will be transferred back into Salesforce as a copy of the sales order. It can be displayed under an opportunity or an account – or wherever it makes most sense. Using Rapidi, you can also trigger additional workflows to notify your back office e.g. to make a credit check on the new customer or to review the order before it's released; whatever you need during your order fulfillment process.

One of the key benefits of Rapiro is you can follow any changes to the order in Salesforce because it ensures the systems stay in sync. When an order is invoiced, it also syncs from Microsoft Dynamics 365 to Salesforce, and the sales order is consequently removed from the open sales orders in both systems and re-appears as a posted invoice.

When the customer pays the invoice, the payment is shown as a ledger entry which enables you to follow the client's balance and payment history directly in Salesforce without having to switch systems. The payments are balanced out with the matching invoices, giving a fantastic customer overview as well as possibilities for improved reporting directly from Salesforce.

Now this might not be your exact process, but it illustrates how system integration can remove all time-consuming and error-prone manual transfers or double data-entries. By bringing all relevant historical customer data into your Salesforce, your salespeople have a 360-degree view of your customers, helping to service them in the most optimal fashion, thereby increasing your bottom line.



5. Sales history App Extension for Salesforce

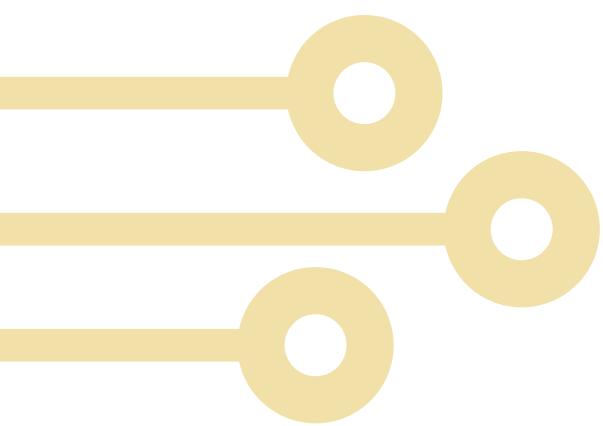
Another bonus of using RAPIDI is the out-of-the box Sales History App Extension for Salesforce. It adds complementary functionality to Salesforce and was developed based on learnings from what works best on the ERP side. It incorporates the ERP thinking into the sales environment as sales people can drill down for details on open orders or sales history. They can lookup accurate pricing and get a fast overview of the main sales KPIs from within Salesforce.

Function-wise, the Sales History App Extension for Salesforce displays ERP data (such as Sales History, Sales Orders, Payments, etc.) from Microsoft Dynamics 365 in Salesforce and makes it available for advanced reporting.

Having access to this data brings additional value to your organization. Users are more motivated to work with their Salesforce system as it contains all the information they need. The use of Salesforce is not limited to keying in information and tracking activities. The ERP data can be used to:

- provide better and more accurate customer service
- build reports that combine pipeline and sales history for better forecasting
- perform all sales-related work without having to switch systems

The Sales History App Extension is an unmanaged application and can be customized according to your needs. By default, the Sales History information is linked to the Account in Salesforce but it can be linked to other relevant objects instead, for example, to an Opportunity.



The implementation of RAPIDI went very smooth and we were up and running within a short time. With RAPIDI there is less manual work and no duplicated data entry which frees valuable resources. All this saves us both time and money.

Allan Iskov Business Process Manager, Netop

▼ Financial Information

| | | | |
|----------------------|------------|----------------------|-----------|
| Balance | 168,364.41 | Total Sales 2013 LCY | 0.00 |
| Total Sales 2009 LCY | 0.00 | Total Sales 2014 LCY | 0.00 |
| Total Sales 2010 LCY | 0.00 | Total Sales 2015 LCY | 0.00 |
| Total Sales 2011 LCY | 0.00 | Total Sales 2016 LCY | 17,100.96 |
| Total Sales 2012 LCY | 0.00 | | |

[Edit](#) [Delete](#) [Include Offline](#)



Sales Orders (Sell-to Customer)

Sales Orders (Sell-to Customer) Help [?](#)

No records to display

Sales History

Sales History Help [?](#)

| Action | Invoice No. | Bill-to Customer | Order Date | Quote No. | Currency Code | Total Amount LCY | Total Amount Incl. VAT |
|----------------------------|------------------------|--------------------------------------|------------|-----------|---------------|------------------|------------------------|
| Edit Del | 103001 | The Cannon Group PLC | 25/01/2016 | | USD | 7,438.50 | 8,182.35 |
| Edit Del | 103015 | The Cannon Group PLC | 07/01/2016 | | USD | 6,615.23 | 8,269.04 |
| Edit Del | 103028 | The Cannon Group PLC | 20/01/2016 | | USD | 3,281.50 | 4,101.88 |
| Edit Del | 104001 | The Cannon Group PLC | | | USD | -234.27 | -292.84 |

Ledger Entries (Sell-to Customer)

New Ledger Entry

Ledger Entries (Sell-to Customer) Help [?](#)

| Action | Entry Number | Document No. | Document Date | Document Type | Due Date | Amount LCY | Sales LCY |
|----------------------------|----------------------------|--------------|---------------|---------------|------------|------------|-----------|
| Edit Del | 0000002473 | 00-1 | 31/12/2015 | Invoice | 01/01/2016 | 25,389.25 | |
| Edit Del | 0000002477 | 00-11 | 31/12/2015 | Invoice | 31/01/2016 | 63,473.13 | |
| Edit Del | 0000002487 | 00-16 | 31/12/2015 | Invoice | 31/01/2016 | 33,852.35 | |
| Edit Del | 0000002493 | 00-3 | 31/12/2015 | Invoice | 07/01/2016 | 50,778.50 | |
| Edit Del | 0000002499 | 00-6 | 31/12/2015 | Invoice | 11/01/2016 | 67,704.67 | |

[Show 5 more »](#) | [Go to list \(13\) »](#)

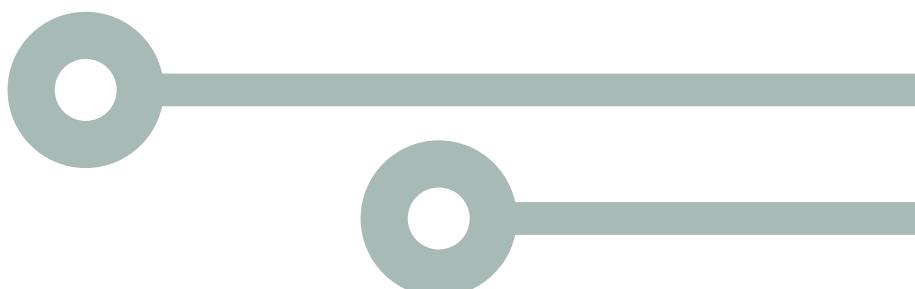
 **Contacts**

New Contact [Merge Contacts](#)

Contacts Help [?](#)

| Action | Contact Name | Title | Email | Phone |
|----------------------------|----------------------------------|-------|--|-------|
| Edit Del | Stephanie Bourne | | stephanie.bourne@cronuscorp.net | |
| Edit Del | John Emory | | john.emory@cronuscorp.net | |
| Edit Del | David Hodgson | | david.hodgson@cronuscorp.net | |
| Edit Del | Mindy Martin | | mindy.martin@cronuscorp.net | |

The financial information (as depicted in the figure above) is calculated in Roll Up Summary Fields based on the transactional information transferred from Microsoft Dynamics 365. These are calculated fields so you can create new fields or modify existing ones to match your needs.



6. What Salesforce and Microsoft Dynamics 365 Systems does RAPIDI support?

Salesforce

RAPIDI is Salesforce certified and Lightning Ready. We are committed to support all future versions of Salesforce and the Salesforce API.

The RAPIDI certification enables you to integrate Salesforce Professional edition without having to purchase Salesforce API access.

Current supported versions:

- Professional
- Enterprise
- Unlimited
- Force.com

Microsoft Dynamics 365

RAPIDI has been working with integrations since 1992 and supports all Microsoft Dynamics 365 versions released and embedded applications such as, but not limited to, Finance and Operations.

Supported versions:

- Microsoft Dynamics 365 Business Edition
- Microsoft Dynamics 365 Enterprise Edition
- Microsoft Dynamics 365 Business Central

Supported applications:

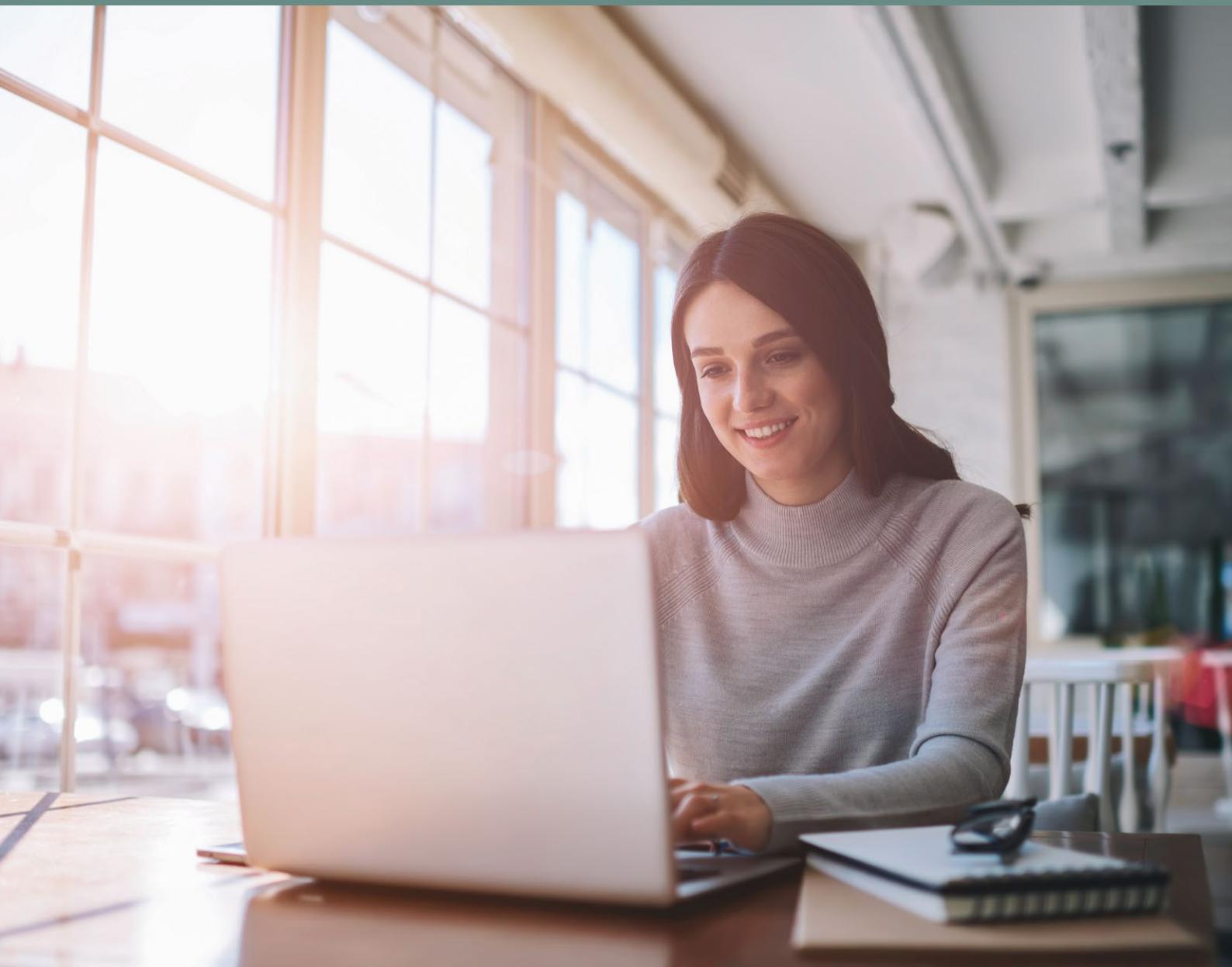
All Microsoft Dynamics 365 applications including:

- Dynamics 365 for Sales
- Dynamics 365 for Customer Insights
- Dynamics 365 for Customer Service
- Dynamics 365 for Marketing
- Dynamics 365 for Field Service
- Dynamics 365 for Project Service Automation
- Dynamics 365 for Finance and Operations
- Dynamics 365 for Retail
- Dynamics 365 for Talent
- Dynamics 365 for Financials

About RAPIDI

Data integration doesn't have to be confusing or complicated. It can be simple and stress-free. At RAPIDI, we are your go-to data integration experts with over 20 years of experience. We apply it to ensure your data integration project runs smoothly. RAPIDI uses cutting-edge technology to provide data integration solutions that are fast yet flexible, simple, robust and secure. We have perfected our blend of human and technical skills to provide you with an unrivalled committed, caring and personal customer service experience. We believe these things are just as important as the technology we use so let us take the stress out of your data integration. RAPIDI is a privately-owned company with offices in Andorra, France, Spain & Macedonia.

Learn more about RAPIDI at www.rapidionline.com



RAPIDI - Rapid Solucions S.L.

Carrer de la Font del Colom, 6
Xalet Parc, L'Aldosa
AD400 La Massana
Andorra

📞 +45 73 848550
info@rapidionline.com
www.rapidionline.com

