Solution overview

Integration: SALESFORCE AND E-CONOMIC

Overview of RapidiOnline solution

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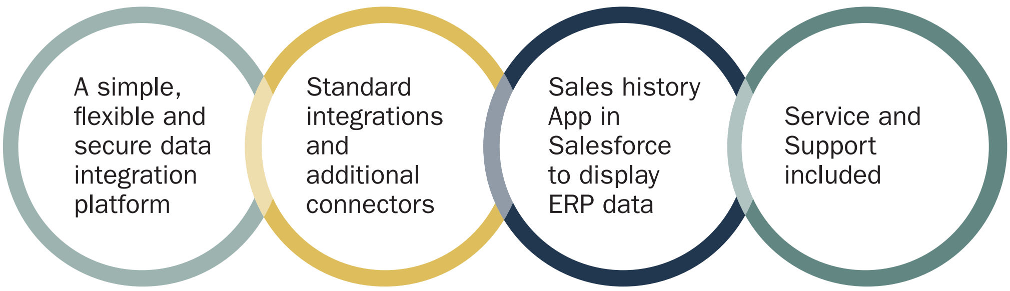
1 | WHAT IS *RAPIDIONLINE?*

> ***The implementation of RapidiOnline went very smoothly and we were up and running within a short time. It has resulted in more efficient work routines and a total overview of our customers, partners, products and prices for our sales people. Due to the tight integration we also avoid duplicated data entry. All this saves us both time and money."***
>
> ***Allan Iskov****, Director of Business Process, Netop A/S*

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 – *RapidiOnline*. 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 RapidiOnline



SIMPLE

RapidiOnline 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 *RapidiOnline* is up and running, the **system is intuitive and simple to use**. Our current customers have consistently rated *RapidiOnline* 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 *RapidiOnline* 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.

RapidiOnline 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 *RapidiOnline* 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.

RapidiOnline 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 *RapidiOnline* does just that.

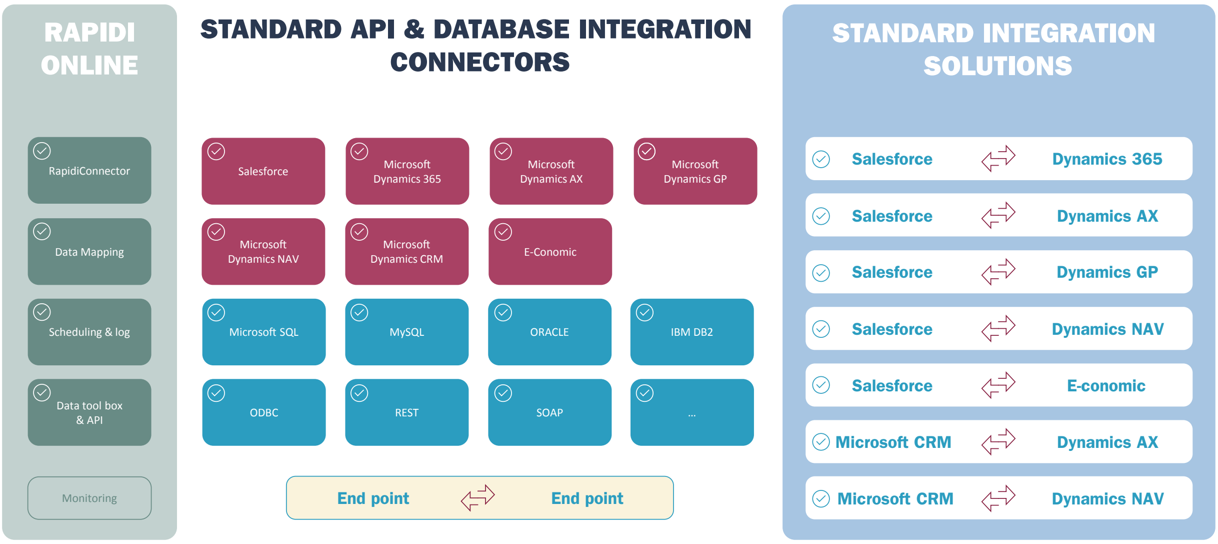
When you use *RapidiOnline,* **your systems are never exposed to the outside world** so hackers cannot gain access. Our service runs via the *RapidiConnector*, a unique technology that ensures data communication between *RapidiOnline* and your on-site systems is not compromised. The *RapidiConnector* 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 and TLS 1.2) 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.

RapidiOnline 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 RAPIDIONLINE FEATURES



FEATURE	DESCRIPTION
Data transfer	Data is SSL encrypted and transferred in binary format, packed and compressed by the *RapidiConnector*. This ensures fast and secure data communication.
Salesforce API and access	*RapidiOnline* 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. **UPSERT** *RapidiOnline* 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.
e-conomic API and access	RapidiOnline connects directly to e-conomic via the e-conomic API.
Security	*Rapidi* 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 and TLS 1.2) 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 only stored on an encrypted-basis.
SaaS solution	Web 2.0 based setup and configuration. Because the *RapidiOnline* 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 adresses and no need to open any inbound ports on your firewall
RapidiConnector	Connects other on-premise systems with e-conomic or Salesforce with your *RapidiOnline* service and compress, packs and SSL encrypts data before it's sent in an optimized binary format for maximum performance.

FEATURE	DESCRIPTION
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	**Field list:** Transfer only specific fields **Filters:** Transfer only specific data within the filter **Sub Transfers:** e.g. Sales Header and Lines in one transaction **Tags:** Reuse an existing mapping
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 e-conomic from a Salesforce Account, the Customer No. assigned in e-conomic can be written back to the Salesforce Account Record in the same transaction.
New or modified data only	**Changes only:** When running on databases with timestamps on the tables. **Mirror**: A *Rapidi* technology to transfer only new or modified data if timestamps are not available in the database.
Schedule transfer frequency	Transfers can be set according to your subscription level. The intervals are daily, hourly, 10 minutes, 1 minute, triggered. 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.
Advanced data toolbox	*RapidiOnline* has a ‘no programming’ approach. However it can be convenient to align data with different format, 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.

FEATURE	DESCRIPTION
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 and notification	*RapidiOnline* 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), *RapidiOnline* 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 *RapidiOnline* Platform offers a long list of alternative connectors: Salesforce – Microsoft Dynamics (365, AX, GP, NAV, CRM) – Microsoft SQL – My SQL – ORACLE – IBM DB 2 – Lotus Notes – e-conomic – 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 CAN I DO WITH *RAPIDIONLINE*?

THE 8 MOST COMMON INTEGRATIONS BETWEEN SALESFORCE AND E-CONOMIC

1. Account – customer

The most common driver for a Salesforce – e-conomic integration is the need to optimize your *Quote in Salesforce to a sales order* in e-conomic. 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 e-conomic 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 e-conomic 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

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 e-conomic 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 – e-conomic integrations where the pricing in e-conomic 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 e-conomic 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 e-conomic, 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 e-conomic 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 e-conomic 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 e-conomic 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 e-conomic and a simplified guided selling system in Salesforce. In these cases, there are two alternatives to integrating to the e-conomic 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 e-conomic, the sales order should be synced back to Salesforce in order to maintain a full picture on the account /opportunity.
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 e-conomic to Salesforce. To get the full picture you will also need to include credit memos.

In e-conomic, 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

RapidiOnline 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:

- *RapidiOnline* 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.
- *RapidiOnline* 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, *RapidiOnline* 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 e-conomic and Salesforce so you'll never be left out in the cold when it comes to upgrading.

3 THE ADVANTAGES OF OUR PRE-CONFIGURED INTEGRATION SOLUTION

> ***"The implementation of RapidiOnline went very smooth and we were up and running within a short time. With RapidiOnline 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*

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

1. It's **fast and easy to implement** your Salesforce – e-conomic 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

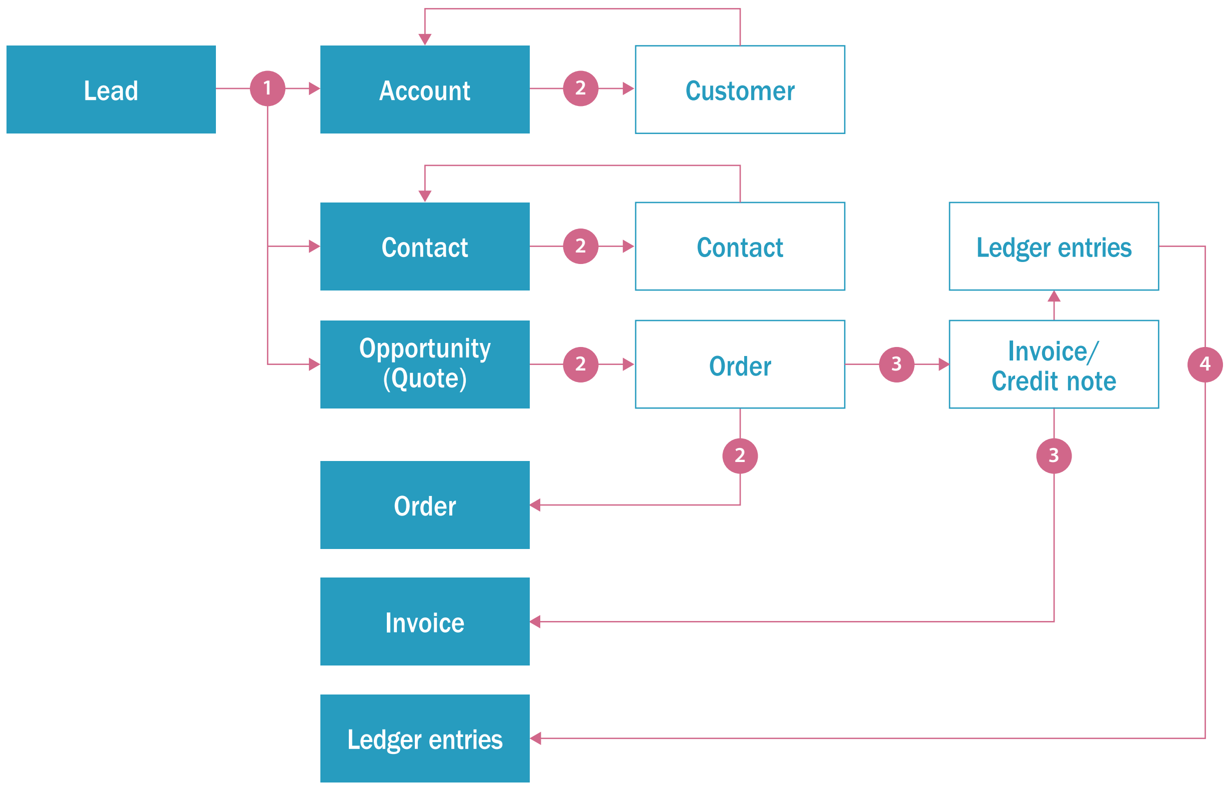
Salesforce		e-conomic
Accounts	⇔	Customers
Contacts	⇔	Contacts
Products	⇐	Products
Standard Pricelist	⇐	Standard Products Prices
Sales History	⇐	Booked Invoices
Payment History	⇐	Customer Entries
Opportunity	⇒	Current Orders

The illustration above is indicative of a typical case. However, your integration doesn't have to work the same way.

RapidiOnline 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.

A Typical Data Flow



Note: *In the image above, the blue boxes represent Salesforce and the white boxes represents e-conomic.*

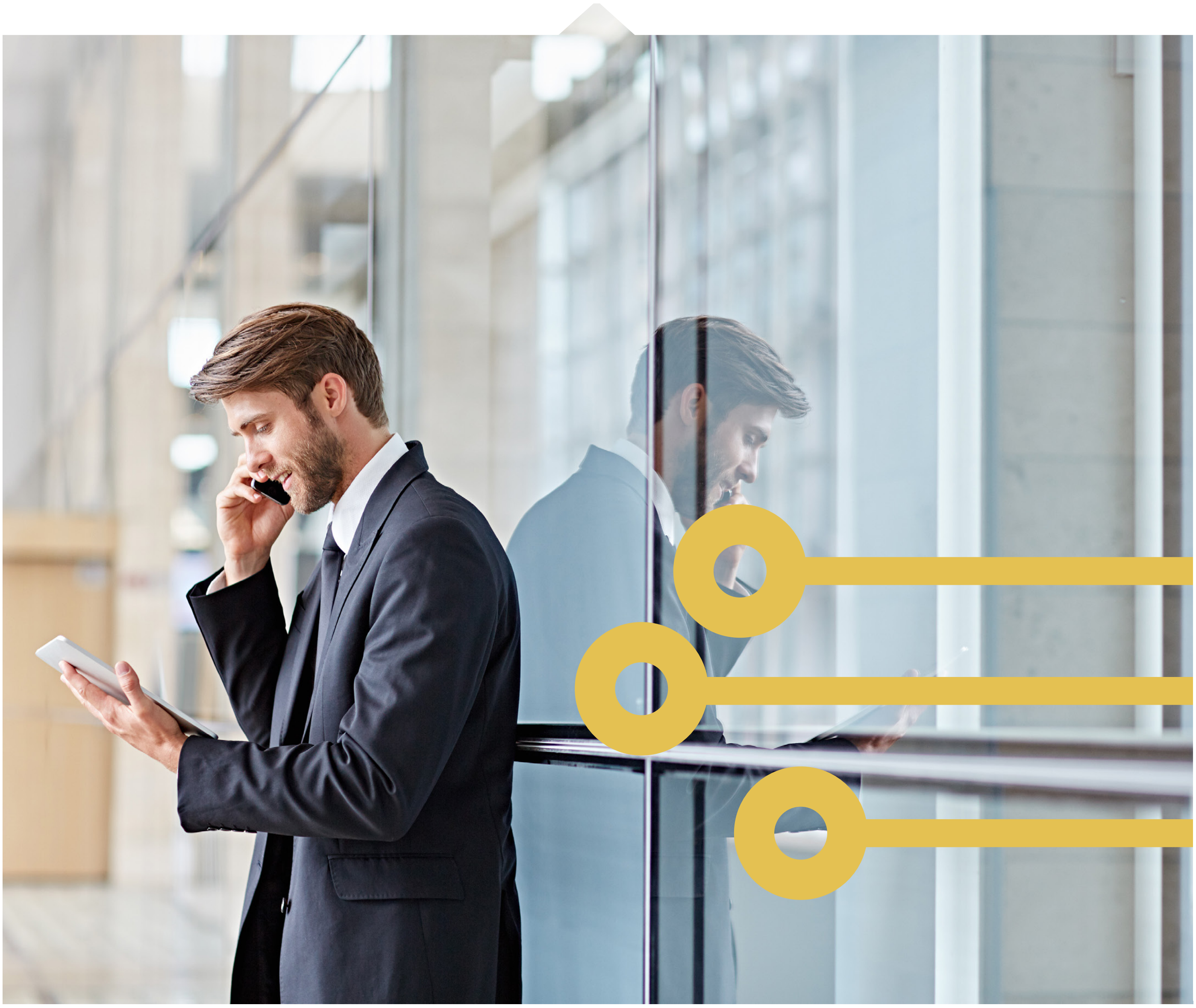
Let's say your company receives a lead. The lead is created in Salesforce. As the sales process moves along, the lead in Salesforce is converted to an account, a contact, and an opportunity. This is standard when using the Salesforce Sales Cloud. At a trigger point – for instance when the first quote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

As there is now an open sales order in e-conomic, 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 *RapidiOnline*, 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 *RapidiOnline* 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 e-conomic 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.



4 SALES HISTORY APP EXTENSION FOR SALESFORCE

Another bonus of using *RapidiOnline* 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 e-conomic 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.

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 figure above) is calculated in Roll Up Summary Fields based on the transactional information transferred from e-conomic. These are calculated fields so you can create new fields or modify existing ones to match your needs.

5 | WHAT SALESFORCE AND E-CONOMIC SYSTEMS DOES *RAPIDIONLINE* SUPPORT?

SALESFORCE

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

Current supported versions:

- Professional
- Enterprise
- Unlimited
- Force.com

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

E-CONOMIC

Current supported versions:

- Start-up
- Small Business
- Professional

ABOUT RAPIDIONLINE

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. Our product, RapidiOnline 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.

Learn more about RapidiOnline at www.rapidionline.com

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