RAPIDI ONLINE
Data Integration made easy

MS Dynamics CRM - MS Dynamics NAV Data Integration Solution

BUSINESS NEEDS

- ✓ Flexible and cost-effective solution that easily can be adapted to specific needs

- ✓ Synchronize customers, accounts, product information between MS Dynamics CRM and MS Dynamics NAV

- ✓ Pass orders from MS Dynamics CRM to MS Dynamics NAV where they automatically are created and processed

- ✓ Transfer the posted invoices from MS Dynamics NAV to MS Dynamics CRM

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

"RapidiOnline's data integration solution was recommended by our CRM partner and made it possible to take advantage of the valuable data in our systems.

The data coming from our ERP system to our CRM system can now be used in a product matrix, where we can get an overview of the total sales made by product and by client over time.

Having this overview gives us a competitive advantage and leads to more sales."
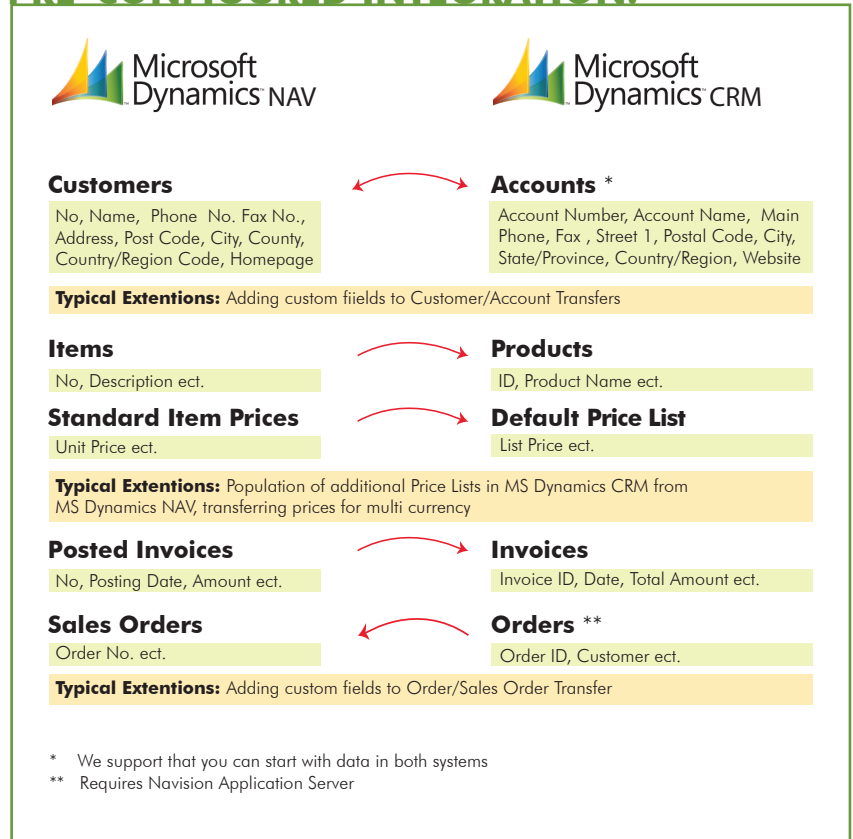
Gert Lynge, IT Manager at InterData A/S

RapidiOnline is a hosted data integration solution that easily integrates MS Dynamics CRM with MS Dynamics NAV. RapidiOnline provides a pre-configured standard data integration solutions, that is ready to use immediately after subscribing to our service. The configuration can easily be extended and adapted to your specific needs.

MS Dynamics CRM - MS Dynamics NAV integration 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 MS Dynamics CRM and MS Dynamics NAV - easily and securely.

PRE-CONFIGURED INTEGRATION:

Microsoft Dynamics NAV   **Microsoft Dynamics CRM**

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

Account Number, Account Name, Main Phone, Fax , Street 1, Postal Code, City, State/Province, Country/Region, Website

Typical Extentions: Adding custom fiields to Customer/Account Transfers

Items → **Products**
No, Description ect.

ID, Product Name ect.

Standard Item Prices → **Default Price List**
Unit Price ect.

List Price ect.

Typical Extentions: Population of additional Price Lists in MS Dynamics CRM from MS Dynamics NAV, transferring prices for multi currency

Posted Invoices → **Invoices**
No, Posting Date, Amount ect.

Invoice ID, Date, Total Amount ect.

Sales Orders ← **Orders** **
Order No. ect.

Order ID, Customer ect.

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

*   We support that you can start with data in both systems
**   Requires Navision Application Server

RapidiOnline provides pre-configured standard data integration that is ready to use immediately after subscribing to our service. Above you see the pre-configured setup for the MS Dynamics CRM - MS Dynamics NAV integration which comes out of the box when you subscribe to our Service. This pre-configured setup lets you get started quickly and the configuration can easily be extended and adapted to your specific needs.

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.

Safe and Secure System - SSL encrypted data transmission without storing data outside MS Dynamics CRM 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)

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 Webservices:
Support for MS Dynamics NAV 2009 Webservices.

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 MS Dynamics CRM:
Ability to trigger a transfer from an event inside MS Dynamics CRM 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

✓ **MS Dynamics CRM**

  » MS Dynamics CRM 4.0

 All options supported: CRM Online, On Premise & Partner-hosted

✓ **MS Dynamics NAV**

  » 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