RAPIDI

Welcome to Open Office Hours

Session 11: Triggers & Near-Real-Time Patterns

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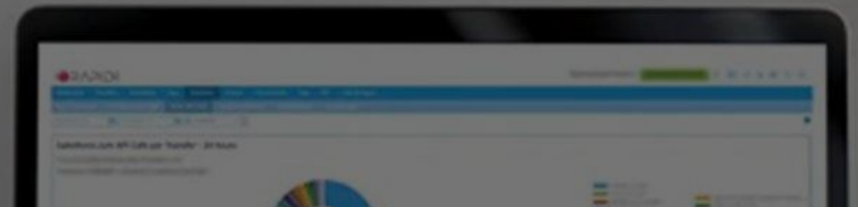
Agenda



- Triggering a Rapidi Schedule On-Demand
- Salesforce Setup: Triggering a Rapidi Schedule
- Demo: From Salesforce Event to Rapidi Schedule Run
- Questions
- Upcoming Sessions
- Resources

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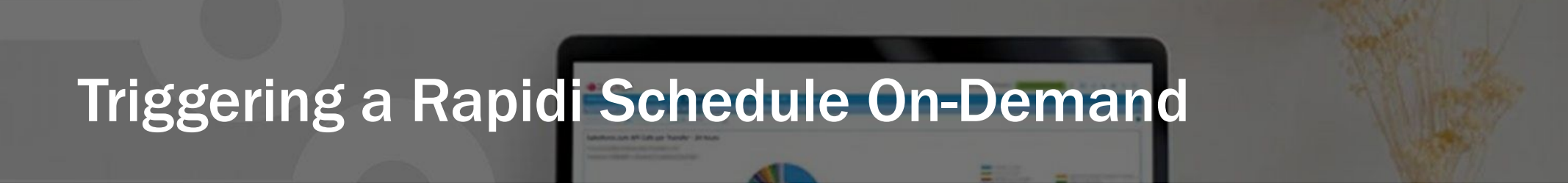
Triggering a Rapidi Schedule On-Demand



Overview

- Rapidi provides a Web Service you can call from another system to trigger a transfer or group of transfers to run immediately.
- The Web Service sets the Next Date/Time on a Schedule to now. If the scheduler is free, it runs immediately; otherwise it runs as soon as possible.
- Avoid scheduling large jobs during business hours when triggered transfers are expected.
- Two Web Services are available: one for Salesforce.com outbound notifications, one generic.

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Salesforce Setup: Triggering a Rapidi Schedule

Prerequisites

- Ask Rapidi support to enable this feature and register your Salesforce Org ID;
- Create a Schedule in Rapidi (MyRapidi) for the sync you want to trigger;

A. Add a ScheduleCode Formula Field in Salesforce

- Setup → Object Manager → [Object] → Fields & Relationships → New → Formula (Text);
- The formula value = your Rapidi Schedule Code (e.g. "G_ORDER");
- If you have multiple Rapidi services: add a **ServiceId** formula field the same way; formula value = your Rapidi ServiceId number.

B. Create an Outbound Message

- Setup → Workflow Actions → Outbound Messages → New Outbound Message
  - Set Endpoint URL to: https://api.myrapidi.com/api/SFDCScheduleTrigger
- Add the ScheduleCode (and ServiceId if applicable) to Selected Fields → Save

C. Create and Activate a Flow

- Setup → Process Automation → Flows → New Flow → select Object, configure trigger & conditions;
- Add Action → select your Outbound Message → Save → Activate.

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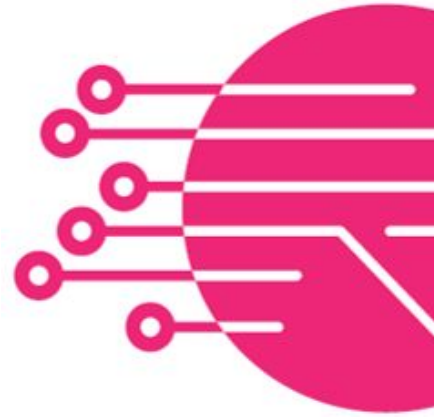
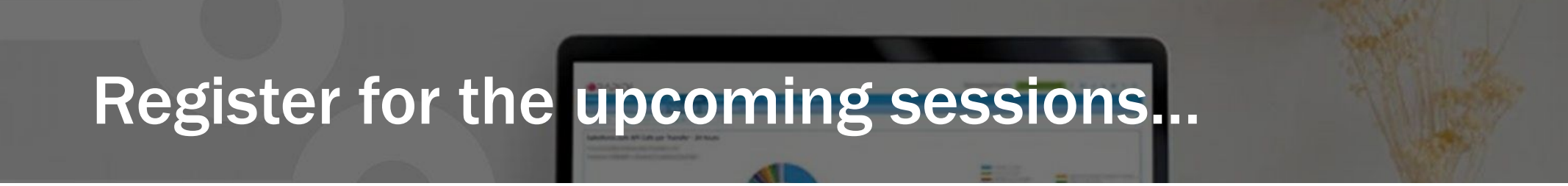
Demo:
From Salesforce Event to Rapidi Schedule Run



Questions?

info@rapidionline.com
www.rapidionline.com
MyRapidi.com/wiki



Register for the upcoming sessions...

Open Office Hours — Quick Links

- **Main page (what it is + upcoming sessions):** Open Office Hours

  https://www.rapidionline.com/resources/open-office-hours

- **Complete Season 1 schedule (all 12 sessions + phases):** Season 1 schedule

  https://www.rapidionline.com/product-updates/open-office-hours-season-1

- **Session 12 page (full details + registration):** Tags & Reusability

  https://www.rapidionline.com/open-office-hours-tags-reusability

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Complete Schedule for OOH Season 1

PHASE 1: FOUNDATION (JANUARY)

Learn to navigate MyRapidi, structure transfers, and connect your systems.

Date	Session Title	Key Topics
Jan 15	**MyRapidi Interface Walkthrough**	Navigation, Transfers, Schedules, Groups, LinkStorages
Jan 22	**Transfer Design 101**	Actions, patterns, avoiding duplicates, design vs runtime
Jan 29	**Connections: D365 OData Cloud**	Azure App Registration, OAuth2, permissions, testing

PHASE 2: CONFIGURATION (FEBRUARY)

Master field mappings, timestamps, error handling, and CRM connections.

Date	Session Title	Key Topics
Feb 5	**Connections: Salesforce & HubSpot**	OAuth flows, user permissions, re-authorization
Feb 12	**Field Mappings**	Type conversions, conditional defaults, lookups, nulls
Feb 19	**Timestamps & RTI**	Change detection, Runtime Information Register, patterns
Feb 26	**Continue on Error & Data Errors**	Error handling, interpreting errors, and reprocessing safely

PHASE 3: ADVANCED (MARCH-APRIL)

Advanced troubleshooting, optimization, and multi-company patterns.

Date	Session Title	Key Topics
Mar 5	**Logs & Runs**	Troubleshooting flow, reading logs, isolating issues
Mar 12	**Link Storage Deep Dive**	Cross-referencing IDs, naming, import/export, and safety
Mar 19	**Scheduling**	Run windows, overlaps, dependencies, and time zones
Mar 26	**Triggers & Near-Real-Time Patterns**	When to trigger, rate limiting, polling vs triggers
Apr 9	**Tags & Reusability**	Parameterization, multi-company, variable substitution
Apr 30	**AI in MyRapidi - An Overview**	Introduction to AI in MyRapidi
May 7	**AI Albert Agent**	AI Assistant Albert with examples
May 14	**MCP Server**	MCP server setup for Rapidi

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Give us Feedback

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RESOURCES (1)

Documentation: MyRapidi.com/wiki

Support: https://www.rapidionline.com/support

Submit a case via MyRapidi: https://myrapidi.com/login

Subscribe to Product Updates: https://www.rapidionline.com/product-updates

Product Releases Notes: https://myrapidi.com/wiki/product_release_notes

SIMPLE

With a standard subscription
you can create new integrations yourself

FAST

Rapidi can be
implemented as standard in just a few days

ROBUST

No programming and
proven best practice configurations

FLEXIBLE

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RESOURCES (2)

[How to Trigger a Schedule]

[How to set up a Salesforce outbound notification]

[Setup Schedules]

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THANK YOU!

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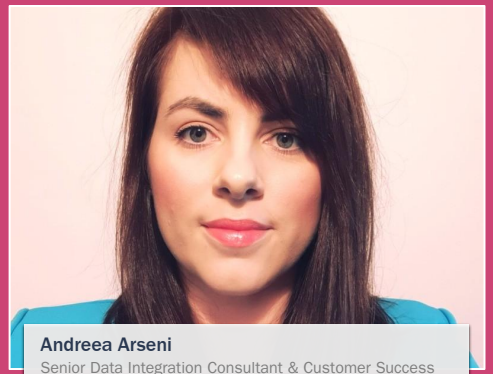

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