



eBook

Data Integration Handbook

10 THINGS TO CONSIDER
BEFORE YOU GET STARTED

**Remain ahead of the competition with systems
that work in synchronicity.**

Avoid the pitfalls associated with data integration projects.

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Introduction

In today's economy, integration is the key to getting ahead. If you want to remain competitive, you need your systems to work in synchronicity. You need to be able to rely on data you can trust – and use it effectively to increase your bottom-line.

Systems that are not integrated cost you time and money due to excessive efforts and time consumption, inconsistent data and inefficiencies in productivity. Data integration solves all these problems with a bonus: increased customer insights!

So why is there a reluctance to integrate? Some reasons include:

- the effort required to integrate
- the fear of downtime experienced while integrating
- the ongoing maintenance costs

But none of these reasons are valid provided you choose the right data integration product and vendor ...

Rapidi – Who we are

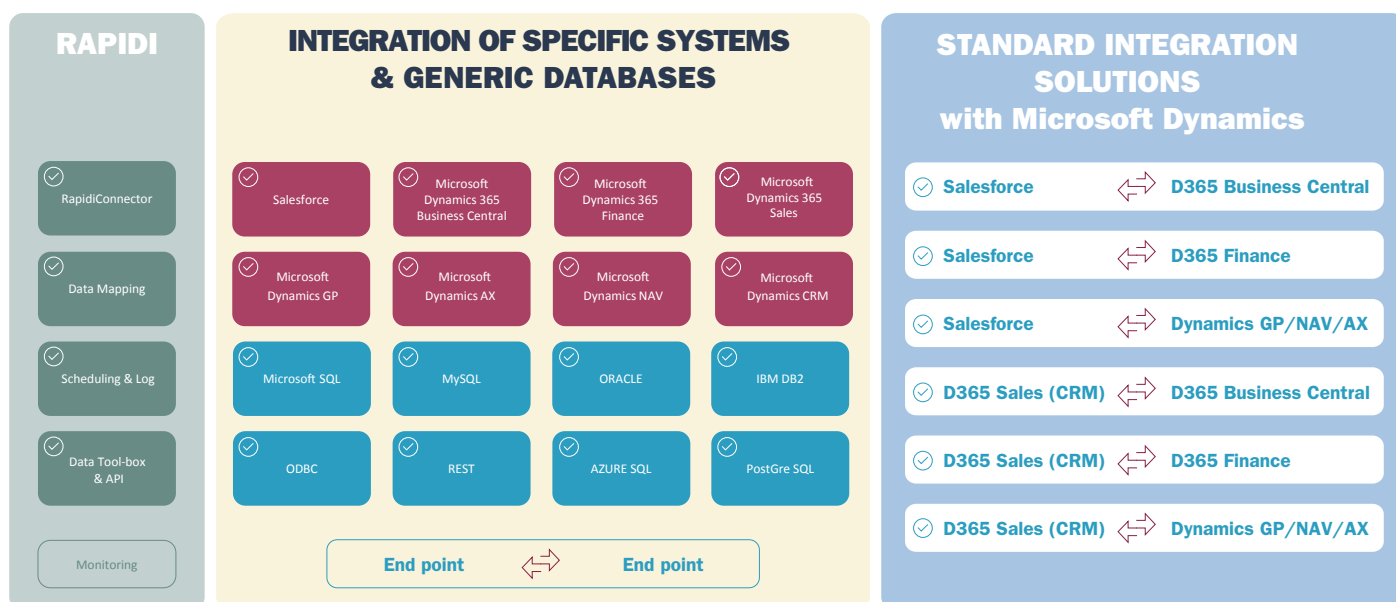
At Rapidi, we believe data integration shouldn't be confusing or complicated. It can be simple and stress-free. For over 25+ years, we've helped customers, big and small, navigate the process of data integration and data replication. Over this time, we've developed a unique understanding of our end-point products and worked out the best practices to integrate customer data in a cost-effective, simple and time-efficient way.

Our deep understanding of the products we integrate means we can offer you expert advice not only about how to transfer your data, but how to use it to streamline your processes and in turn, provide a better service to your customers and improve reporting and operational efficiency. 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 as we believe these things are just as important as the technology we use. We are quite simply, your go-to data integration experts.

“It's not often you come across a system that just works as designed, is very well supported and makes life so much easier.”

*Gary Beach, Senior Business Systems Manager,
Domo Tactical Communications*

What is Rapidi data integration solution?



Rapidi is an innovative software-as-a-service 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 Microsoft Dynamics 365 Business Central, Sales or Finance. We also support earlier Dynamics versions such as Microsoft Dynamics NAV, AX or CRM. We've designed it to specifically enable direct integration so your data will never become 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 an advanced setup. With Rapidi we have simplified complex data integration scenarios, featuring our RapidiConnector and a no-programming approach, even if you want to extend your solutions with add-on solutions or customizations. Rapidi is very flexible and once it is up and running, the system is intuitive and simple to use.

Now that you understand a little bit about our background and product, let's get to the 10 key areas you should consider before embarking upon your data integration project. Along the way, we'll also explain why choosing a data integration platform – as opposed to a custom-developed interface – means you'll avoid some of the biggest pitfalls associated with data integration projects.

1. Working out your scope

What is the scope of your data integration project?

Data integration is a simple phrase to describe the process of getting two systems to talk to one another. When you perform a data integration, your main task is to secure a flow of data between two or more systems with differing functions (for example an ERP and a CRM system). Data integration transfers data from one system to another.

Data can be related to:

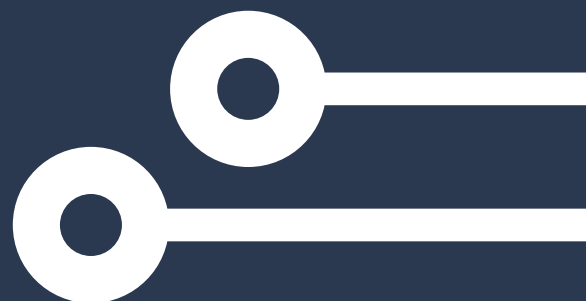
- | | | | |
|-------------|-----------|-------------------|---------------------|
| • Customers | • Pricing | • Invoices | • Service contracts |
| • Contacts | • Quotes | • Sales history | • Custom tables |
| • Items | • Orders | • Payment history | and fields |

All fields can be synchronized. It doesn't end here though as you can include other types of data, for example traditional master data (such as posting groups and other data). The options are limitless – it all depends on your business processes, systems and needs.

Apart from identifying which data you want to transfer between your systems, you should also decide the direction of your transfers. Do you want it to be one or bi-directional? In most cases, we find that businesses choose a mix of the two. It all depends on how the systems are implemented and where their data is born and maintained.

Best practice tip

With our Rapidi solution we have developed a number of pre-configured integration templates using best practices. This means you don't need to detail all your scoping requirements as our out-of-the-box solution automatically does the hard work for you.



2. Project setup

Set up your data integration project in 3 easy steps

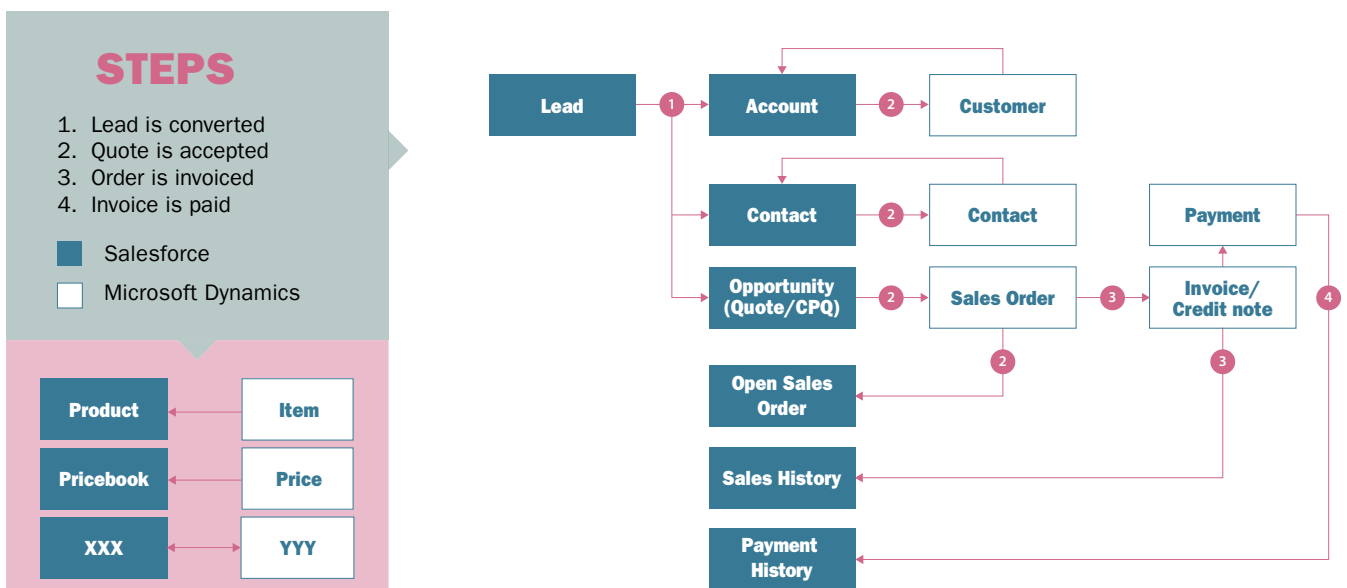
In the early days of data integration, it was common practice to build direct batch interfaces that required a lot of development to get the data and formatting right; both in terms of programming and testing. There were a number of pitfalls with this method, particularly pertaining to data inaccuracies and synching problems. These days, more agile systems like ERP (for example Microsoft Dynamics) and CRM (for example Salesforce) have been developed, which means it's much easier to take advantage of cost-efficient and robust data integration platforms where most of the work is reduced to a simple configuration and mapping of data.

The 3 steps in setting up your data integration project

Step 1: Define your business processes & data integration scope

We've talked a bit about scope above so let's delve a little further into this so you can define yours along with your business processes. Let's use an example to illustrate:

1. A lead has been converted in your CRM system will trigger the creation of an account and contact and they will feed into your ERP system as customer and contact records.
2. Contact information is synced between the two systems
3. An opportunity/Quote/CPQ is created in the CRM system and when accepted transferred to the ERP as a Sales Order visible as Sales History under the Account
4. Order is invoiced and when paid it will be transferred to the CRM system visible under the Account as Payment History



Data transfers are usually configured separately for each entity (in this example: customers, contacts, orders etc.) During the defining stage, you need to decide which table and fields flow between the systems and how often. Your company might have a different logic around your systems, so the most important thing during this stage is to define how you want the integration to work for you.

A common mistake for many companies is to try to transfer as much data as possible from their CRM to ERP (and vice versa) as possible. This results in extra efforts for a data integration solution that is difficult to maintain. So, when deciding which data to transfer, define precisely what you will use the data for in the other system.

If you need help in defining your business processes and scope, the Rapidi team will be happy to offer advice about best practice scenarios for all common business processes that are impacted by data integration.

In our experience, we find most companies benefit from using our best practice templates so not everything has to be started from scratch.

Our templates are pre-built integrations and include all the components that you need to integrate two or more systems. We have pre-built mappings for both source and destination systems and this allows you to significantly reduce the implementation project and gain full value of our technology. The benefits of using our templates are:

- 1.** Design low code data integrations that are flexible and easy to maintain;
- 2.** Save both time and resources during and after the implementation;
- 3.** Reduce any maintenance costs because they are user-friendly and flexible;
- 4.** Enable business process automation throughout the organization allowing users to easily manage the integration.



Step 2: Connect the systems via the data integration platform

Next you need to connect the two systems you want to integrate via the data integration platform you have selected. The system configurations (tables, fields and other relevant information for the integration) are read and stored to help the users define the mappings correctly and with the right fields from your database.

Sequencing your transfers

After that, the transfers have to be sequenced in the right way within the data transfers. For example, if you are transferring an order, it makes sense to transfer the items data first as there might be a new item on the order. Without that item, there would be a broken reference or no reference at all.

Usually, transfers can be run via two methods: schedule-triggered transfers where we have a schedule that runs at a specific time and date and record-triggered transfer where the transfers are run in real-time.

From our point of view, the most reliable option is the schedule-triggered transfers and here are the reasons for it:

- 1. Data synchronization** - When you synchronize data from source to destination, you need data to be transferred sequentially to avoid data errors and further troubleshooting. For example, if you transfer both items/products and orders from one system to another, you do need to always transfer items first and then the orders. A real-time transfer would transfer them at any point in time, even simultaneously. This would cause data errors and would require troubleshooting on both sides.
- 2. Destination system's limitations** - scheduled transfers can send a specific number of records at the same time so it does not overload the destination system whereas real-time transfers can send large sets of data at any point in time. You cannot control how much data is being sent when you are running real-time transfers. It's important to know that any destination system has a specific limit in terms of records that can be created or updated per minute.
- 3. Delays & Errors** - A scheduled transfer will run at the specified time and date without interfering with other schedules. The real-time transfer will run anytime and it can interfere with other schedules and it can overload the destination system causing it to throw back errors.

It is also during this phase that you decide which system has priority over the other(s) for a bi-directional sync of tables in case a piece of data has been updated in both systems. When the data transfers and schedules are set up, you will start testing it, typically starting with a few records, until everything is ready. This is often when you realize that your existing data is not as good as you thought it was! You then need to do a bit of data cleaning (see section 3 *Data Quality* for a guide on how to do this).

You may also find yourself in the situation where data has been created manually in both systems before an integration is established (for example, customers without a unique reference). If you integrate the systems without considering the existing data, you will get duplicates.

To prevent this, you will either have to make a batch job or a query that can update this automatically, or you will have to manually look them up and add an identifier that clearly links the two records together. If you plan ahead, this is simple to fix. However if you don't, you could end up with a lot of records that need fixing or merging later.

One of the great benefits of using a data integration solution such as Rapidi, is that changes to your integration can be easily and quickly made to ensure you have perfectly synchronized data.

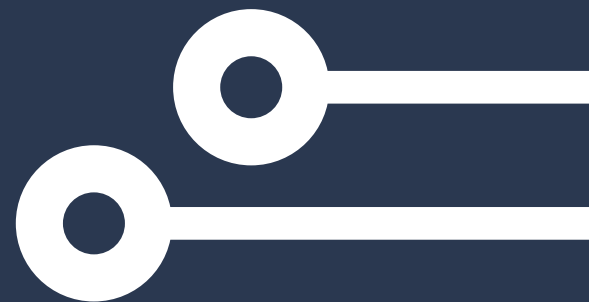
Step 3: Get the systems in sync

When everything is tested, and the initial data transfer is made, you sync the two systems. You don't have to do everything at once. You can take one area (such as Customers-Accounts) and bring it live before moving on to the next. This way your end users quickly see the benefit of the data integration and it encourages a faster acceptance and user adoption of the system. Congratulations! You have completed your data integration project.

When using a data integration platform like Rapidi and with everything set up correctly your integration should just run in the background and you forget about it. After the go-live of your data integration project, you will be handed over to the support team. At Rapidi we ensure that this will be a very smooth process. If something is amiss Rapidi has an intelligent error-handling system, where the integration administrators receive an email notification with a description of the error and a direct link to the data transfer and log to enable you or our support team to investigate and resolve the issue.

Best practice tip

Take advantage of Rapidi's pre-configured templates to ensure the task of setting up your data integration is smooth, simple and stress-free.



3. Data quality

Making sure you only transfer high quality data

The ultimate success of your data integration depends on the quality of the data you transfer. More than ever before, organizations rely on their data to run their business, improve customer service, increase sales, comply with government regulations as well as streamline global operations and reporting. To be effective, corporate data needs to be accessible, accurate and reusable throughout the organization.

Companies often need to integrate data from multiple systems into new, more productive data-intensive applications – and that's where data integration projects are of most benefit.

However, no data integration project should go live without a thorough clean-up of data as well as a firm plan to maintain its integrity.

Your data integration project will only be able to deliver valuable data to your systems if it's entered correctly, consistently and completely.

To ensure long-term data quality, adopt this step-by-step approach to your data integration project:

- Identify the business processes that you would like to optimize with data integration
- Identify and analyze the data supporting these processes
- Do a thorough clean-up of this data, finding and fixing missing or inaccurate data. Note: this can be time consuming!
- Integrate data quality validation checks throughout your business workflows
- Remember: high quality data will ensure better end-user adoption of your systems moving forward

One of the biggest problems with data quality is that it is a continuous process that requires discipline and a well-planned out maintenance process. If your organization does not pay attention to data quality, it will naturally degenerate over time.

Note: once you have your data synchronization in place, you have already come a long way in improving your data quality. Your systems will be perfectly synchronized according to your integration settings, for example, if you change a customer name in one system it is updated in the other system(s) automatically.

4. Data mapping

Do some preparation work to ensure the best data mapping

With the right platform, choosing which data to synchronize is a straightforward task. The trickiest part is when you have to map the logic of two different system data structures. For example, in ERP systems, address information is often split up in separate fields. But in a CRM system like Salesforce, everything is stored in one field.

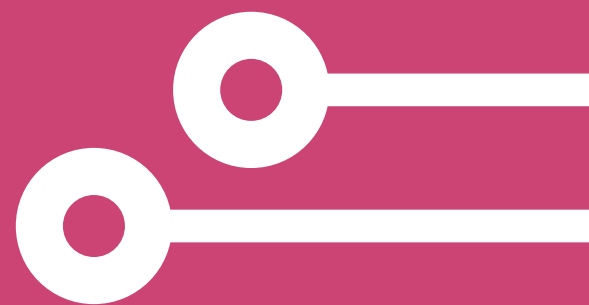
Another important thing to consider is you may have different validation criteria in the systems for the same data. You may, for example, have different email or phone number formats. If you don't align them, you will get a lot of errors once your integration starts. The best practice is to ensure a good validation of the data where it is born.

You may also find you have different field types in each system, for example a picklist in one is a table lookup or a text field in another. In that case again, you have to make sure to align the rules around the data transfer.

Data integration platforms such as Rapidi provide all the formulas and tools needed to do this. We even have pre-configured templates available where the formulas are already made for you.

Best practice tip

Avoid data integration errors by aligning data validation criteria between two fields or tables and by validating data where data is born.



5. Schedules and sequencing

Define your data transfer schedules and sequences

Aside from data mapping and looking at the quality of your data, you also need to consider how often and in what order you want it transferred. With a data integration solution, scheduling is quite flexible depending on what your subscription level or license allows.

For many companies, it can be very tempting to instantly transfer all information in one hit at the start. But this is not the most practical way of working as it creates an unnecessary load on your systems. It makes more sense to review your specific needs and align and sequence the transfers according to those. Some data only needs to be updated once a day (like posted invoices which are usually transferred at night) while others benefit from a higher frequency such as customer or contact data.

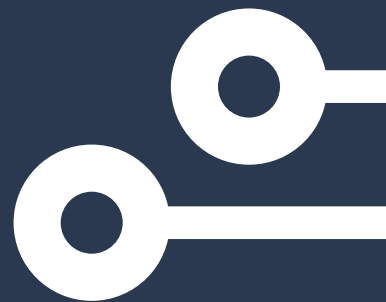
There is a natural hierarchy of data and the most logical thing to do is to build the sequence of transfers starting at the lowest level. For instance, if you want to transfer your Orders from SFDC to ERP, you would typically create a new customer in the ERP before a new Order is transferred from SFDC to the ERP.

This highlights a further possibility when integrating data; the fact you can incorporate data into the target system's business logic. For example, you can transfer an order from your ERP system to your CRM system but at the same time access product data. Linking these data lines gives you great value, not to mention enhances your reporting capabilities. Perhaps your system environment requires you to integrate additional systems? That's no problem as you can custom define both transfers (mapping) and sequences. You can even handle data transfer field by field, table by table, system by system so you can match scheduling and sequencing to your specific business requirements.

While this all sounds a bit complicated, the good news is that a large part of this comprehensive work is delivered out of the box with the Rapidi standard integration templates. It provides suggestions for mapping, sequencing and scheduling and is built to support best practices workflows between the systems.

Best practice tip

1. Don't set up an instant transfer of all data at the start. Instead, sequence the data transfer according to what is needed for each data set.
2. Always build the sequence of transfers from the lowest level up.
3. Take advantage of the proposed sequences of transfers in Rapidi standard integration templates.



6. Error handling

Why it's best to be prepared when handling errors

Errors happen. There is no getting around that fact. But when they do, how your data integration platform identifies and deals with them can make or break your integration.

The most common errors:

- Poor internet connection
- Bad or missing data in the source system causing validation errors in the target system
- A new (untested) system update either in the source system or in the target system
- Something is wrong with the setup of the integration itself (very rare)

One of the biggest challenges when transferring data is the need for full transparency, especially if something goes wrong unexpectedly. When companies build a custom interface integration, they encounter multiple problems when faced with errors.

They:

- underestimate the difficulties in identifying errors and how to fix them without jeopardizing the consistency of their databases.
- discover they've only planned for the system to import data and not handle data or connection errors.
- realize the system is set up to tell them something went wrong – but not what is wrong or how to fix it.



Dealing with these problems isn't hard if your integration does it for you. And Rapidi does. Here's how:

“Our company uses Rapidi to sync our customers’ ERP systems with the webshops that we host for them. With Rapidi we now have a sync engine that can sync against virtually any ERP system that we have come across. We can also access all syncs from one common web interface without the need to access our customers’ computers, which makes it much faster and easier to make adjustments.”

Bo Hedegaard, CEO, MCB A/S



“We are using Rapidi for our Global integration between Salesforce and MS Dynamics Business Central with 3 Regional Instances and 10+ Operating Company’s. Rapidi is a joy to work with; Good support, easy to implement and easy to maintain. Best Value for Money in the market!”

Jeroen Weijts, Director Operations, Movella

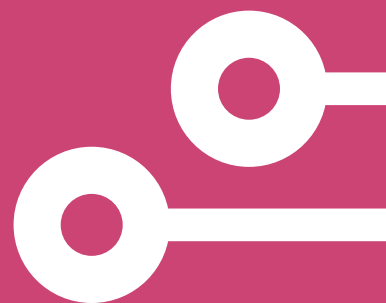
“Rapidi was fantastic to work with during our implementation process. They were there every step of the way to ensure our integration met our needs perfectly.”

Mike Voseipka, Vice President, COMPanion Corporation



Best practice tip

Choose an Data Integration Provider with expertise in integrating the systems that you use in your company.



Error handling using a data integration platform

When it comes to errors and transparency, Rapidi delivers it straight out of the box. To begin with, the number of data errors is minimized because the required data mappings and migrations between standard fields are included in the integration templates.

Rapidi provides a log that contains information about all transfers; whether they were successful, or if they had contained an error. However, an error message in itself is not enough. You need to get enough information to understand the problem. Only then can you figure out how to solve it and whether additional action is needed to prevent future errors of the same type.

If a Schedule has failed to run, administrators or users that have been set up in Rapidi to receive notification emails will be notified. The email includes details on the errors, where it occurred and with a direct link to the error. This makes it very fast to investigate the problem and solve it.

Once the error is corrected in the source system, it is automatically transferred the next time a data transfer runs. Alternatively, you can manually run the transfer again to check it. With Rapidi, data schedules are monitored. If they fail to run for a certain amount of time (you can set this duration), you will receive an email notification.

Best practice tip

Choose an Data Integration Provider where you almost can forget about your integration as it just runs smoothly in the background.

“Even the most complicated integration looks so easy when using Rapidi data integration solutions. We have now multiple companies using Microsoft Dynamics NAV integrated to Salesforce by Rapidi and everything just works. If we have needed support or additional data integrations the response time has been fantastic. Highly recommended, five stars!”

Peter Ståhlberg, Sales Director at SEMEL Scandinavia, Finland

7. Displaying transferred data

How is the transferred data displayed?

When you integrate two systems that serve different purposes – for example an ERP system (such as Microsoft Dynamics) and a CRM system (such as Salesforce) – it can be tricky to appropriately display and store the data in the receiving system. Out of both systems, which interface do you use?

Let's look at a working example to answer this:

Say, you've just transferred your sales history from your ERP system to your CRM system. Where should you actually place it? And how should you display it?

Sales data visible & available to boost user adoption

Logically, it should be placed under accounts in the CRM system. To support such scenarios, Rapidi's standard integration into Salesforce includes additional functionality (called 'objects') that can be imported into Salesforce so the information you integrate is visible and instantly available for the users.

If you are implementing a new CRM and / or ERP System having the data available and visible in their system they work with highly improves user experience and adoption of the systems. For example having the relevant sales data available when they need it is a great advantage and support for the entire sales team.

Integration projects are often linked to cross-company optimizations in departments such as marketing, sales and administration for this very reason.



8. Changes, upgrades & maintenance

Planning for future changes, upgrades and maintenance

If you work with 'raw' base technologies such as XML, Web Services and REST interfaces, it can be tricky and very time-consuming to maintain a robust data transfer between two systems. To combat this, Rapidi places a shell around the base technologies that automatically transforms the very complex base data into a much simpler, efficient and intuitive form. All you need to do is map the two relevant fields, save and run. This usually takes less than a minute.

Rapidi does not require any code changes so when it comes time to upgrading, you're all set. So if you need to upgrade your ERP or CRM system, Rapidi needs and will support the latest versions of those systems. This means that Rapidi will do the heavy lifting to ensure that the latest versions are supported and that you can continue with the same transfer setup as much as possible.

This offers a huge advantage over a custom-developed data integration interface. It would require a full upgrade to its system functionalities which would leave you open to all manner of worries such as compatibility errors and other fragilities.

Best practice tip

Using a data integration platform such as Rapidi means data is directly transferred between the systems without need for further changes when upgrading. As a result, it's more flexible, robust and less vulnerable to errors.

"The connection of SalesForce and NAV via RAPIDI works very well, even with older NAV versions. When setting up the interface, it was technically very flexible and easy to respond to our requirements. The support from RAPIDI in the project was great. Now we can handle changes or problems ourselves."

Andreas Hackle, Admin at Passion4IT – Germany

9. Adding new end-points

Easily adding new end-points

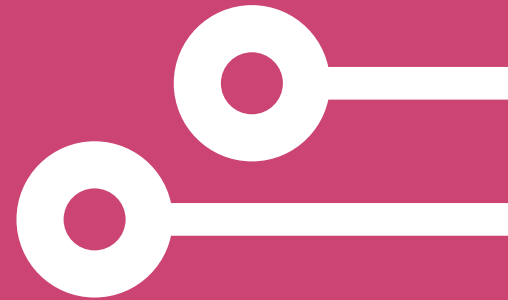
Another good reason to use a data integration platform is that it gives you the ability to reuse what you have already configured in other integration cases. It also allows you to extend any existing integration configuration with additional tables, fields, etc. For instance, if you are running on an ERP system with multiple companies, you can use a simple tagging system to utilize the integration functionality in other databases and accounts. They are all centrally connected on a data integration portal, giving you a complete overview of all data transfers. Should your organization need to set up an integration with a new company, you can easily accommodate this request within few hours.

If you want to integrate a third system (or more) you can with Rapidi. It's also possible to connect directly to a database, so if a solution runs on top of say, Microsoft SQL data, Rapidi can also access this database directly. This is generally the fastest way to read data too.

Best practice tip

If you are a multi-location or multinational company, choose the most cost-effective solution that gives you the most value for money.

With Rapidi, if one of the companies in your group operates in a different type of business and needs a different integration setup, you could start with the standard Rapidi integration template and add the specific configuration on top of that. Fast, simple, stress-free.



10. Data security

Placing a safeguard around your data

A data security breach can happen to any organization at any time. There is no doubt that companies should carefully think about data security especially today when we place more and more data on public clouds, or within big data systems.

Many clients rightly have concerns about security when transferring data. Their top three concerns are:

- What happens when you integrate two systems via the internet?
- Does the transfer of data from one system to the other expose and potentially endanger the security of your data?
- Can data integration make your company more vulnerable to a data security breach?

We take these concerns very seriously and have worked hard to ensure Rapidi addresses them.

Here's how we do this:

We put a padlock around your data

When developing Rapidi, data security was (and always will be!) our number one priority. The way we secure your data is quite simple. The RapidiConnector packs, compresses and encrypts data before transferring it. We use a unique proprietary protocol to pack and transfer your data between the Cloud and your on-premise systems. Because of the proprietary protocol and the compression, it is extremely difficult to decipher the transmitted data – thereby ensuring data security. We apply standard high SSL/TLS encryption on top of this gives it an added high level of protection.

Secure connection with RapidiConnector



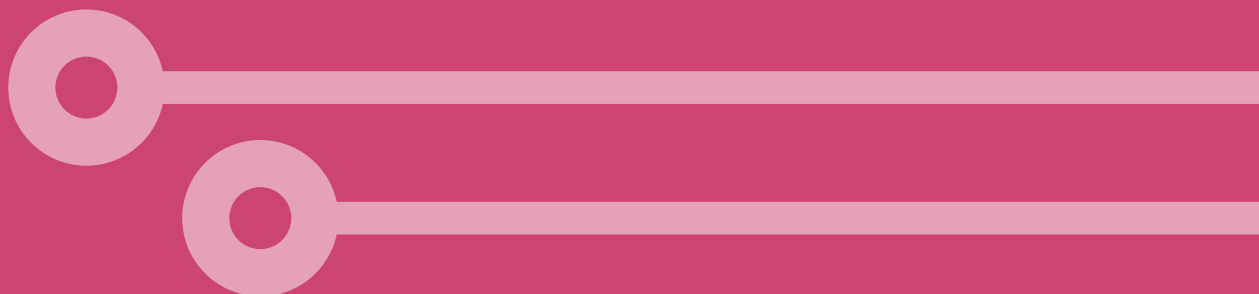
Extra features of the RapidConnector

An innovative feature of the RapidConnector is that it resides in your on-premise network connecting outbound to the central Rapidi service and enabling two-way communication between Rapidi and your systems. This offers a great advantage as you don't have to change anything in your network or firewalls to deploy the Rapidi. No inbound ports need to be opened in your firewall so your internal systems stay secured and protected from outside threats.

The communication between Rapidi and the RapidConnector is highly efficient in reducing the amount of data and the number of packages sent and received. As an example, the protocol first joins up to 200 records in 1 package and strips off all meta information. It then only sends the relevant data. Furthermore, the package is compressed before sending. This results in highly efficient data transfer.

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

Finally, the data is encrypted during transfer over the internet using high standard security SSL/TLS.



“We are problem solvers, committed to helping businesses perform better through their best possible use of data. We were among the first to solve the problem of data transfer, the first to create a dedicated data integration tool and the first to offer a data integration platform as a service. Now we consistently work to be the best.”

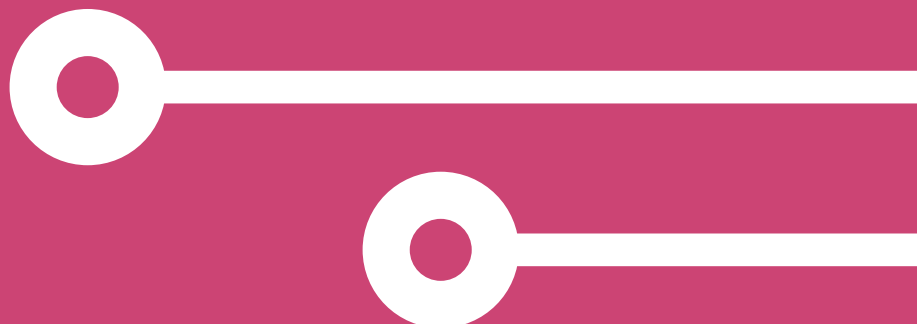
Michael Bock, Founder, Rapidi

Why Rapidi is the right solution for your data integration

BENEFIT FROM DATA INTEGRATION BEST PRACTICES

Six reasons why Rapidi is a superior integration product

- # **1: Professional certifications.** Rapidi is designed according to the latest Salesforce certification standards. We have multiple professional certifications and we are a Microsoft and a Salesforce AppExchange partner.
- # **2: All online.** Rapidi is a cloud integration system so all configurations are set up online. We don't need to apply any additional code or programming Microsoft Dynamics to perform your integration. This also means there's little to no future upgrade costs and maintaining Rapidi is easy and stress-free.
- # **3: Robust and secure.** Your data is transferred directly between systems controlled by Rapidi which means your data files are never exposed to the outside world and you can be certain your data is safeguarded.
- # **4: Fast, yet flexible.** Our advanced technology supports fast implementation and deep data transfer. But our speed doesn't sacrifice the flexibility of our tool.
- # **5: Cost-effective.** Other data integration solutions can be very expensive to develop, run and maintain, particularly if they are custom-built (imagine the costs involved in having to call in a technical consultant, who has specialized knowledge in the customized system, each and every time something goes wrong with your transfer?). With Rapidi, you don't have these concerns. You get a robust solution that works out of the box thus is very easy to set up. It's designed to do exactly what you need and can also be adjusted to suit your requirements should they change – in a very simple and cost-effective way.
- # **6: Pre-configured templates.** Take advantage of our standard pre-configured integration templates for Salesforce, Microsoft Dynamics 365 Business Central, Finance, Sales, AX, NAV, GP and other systems to get up and running in no time. For example, the integration between Salesforce and Microsoft Dynamics Business Central comes with 320 fields already perfectly mapped.



Learn more

Interested to find out more? We'd love to discuss how Rapidi can help you with your unique data integration challenges. Connect with us to receive more information or simply have a chat. You can also visit us online at www.rapidionline.com



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 25+ 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

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