## Email Syncing

Integration Guide







Gain more context on candidates with email syncing all in one place

Access greater depth of context on candidates you, or your peers, have engaged with helping you validate whether they are qualified for the role.

Increase hiring efficiency by spending less time switching between tools. Streamline team collaboration by sharing candidate email history with peers on your dashboard.

Improve the candidate experience by crafting better-informed messages, helping candidates feel valued & heard.





# Email Syncing integration at a glance

Spend less time switching between platforms to source candidates and use Email Syncing to increase visibility of candidate conversations. Setup Email Syncing to consolidate candidate communication between your work email and Recruiter inbox to view candidate conversations directly within Recruiter.

#### Recruiter Admin

Contract Enablement

- The Recruiter Admin must work with their IT Admin for enablement approval and to help ensure the correct permissions are granted within their email provider settings.
- Once approved by your IT Admin, the Recruiter Admin can enable Email Syncing within their Recruiter contract.

#### Recruiter Users

Individual User Enablement

- Each individual Recruiter User will be required to authorize their individual email settings to enable the Email Syncing feature.
- Individuals will not be able to authorize the Email Syncing feature unless it has been enabled by the Recruiter Admin at the contract level.

#### Things to be aware of

#### Fees

There are currently no fees for integration.

#### Compatible Providers

Microsoft Office 365 (cloud deployments) Google Workspace

#### Get started

IT Admins will need to use the following guides to grant the correct permissions to the application:

- Google G Suite email and calendar integration guide
- 2. <u>Microsoft 365 email and calendar</u> integration guide

Please review the following help center articles for further information:

- Enable email and calendar integrations
   as an Admin in Recruiter
- 2. <u>Authorize your email and calendar</u> settinas in Recruiter



### We'll help you get started.



### Provide IT Admin with documentation

Share the following resource with your IT Admin to ensure the correct permissions are granted for enablement:

Outlook & Gmail Integrations with Recruiter



### Select your email & calendar provider

Enable the Email Syncing feature for your Recruiter contract.

(Recruiter Admins only)



### Authorize your email and calendar

Authorize your individual work email to enable message syncing from your email inbox into your Recruiter contract.

(Individual Recruiter Users)



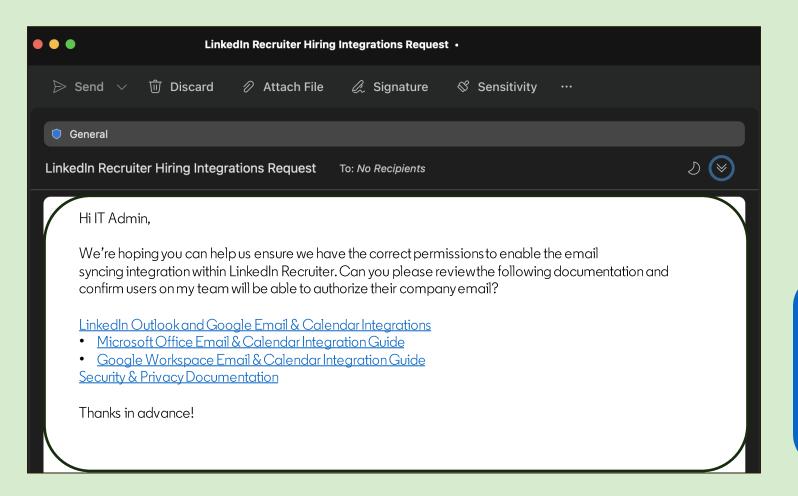
### View candidate communication in Recruiter

View email messages from candidates all in one place, in Recruiter, and seamlessly share conversations for better collaboration between team members.



### We'll help you get started.

If needed, you can reach out to your IT Admin using the following template:





#### Note:

Microsoft integrations will only work with cloud deployments.

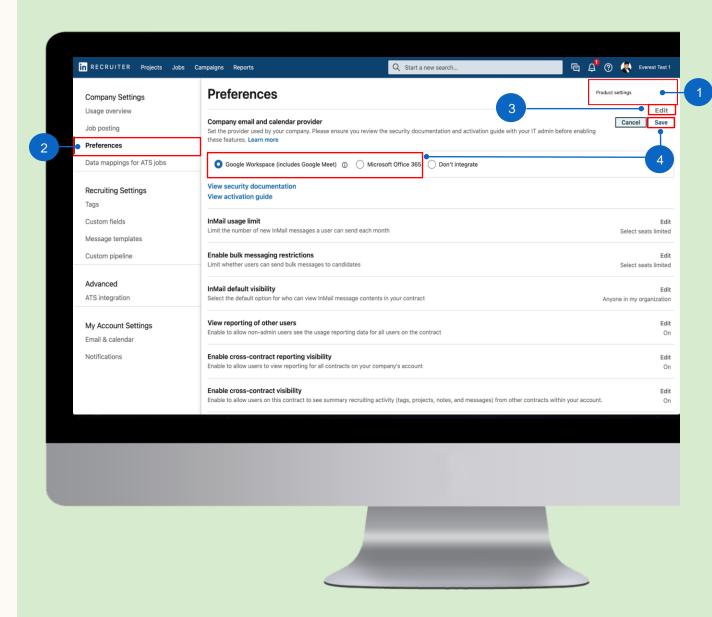
IT Admin can limit access to application to specific users/groups

### Select email & calendar provider

Admin-only view

First, enable the Email Syncing feature for your Recruiter contract:

- Click your profile picture in the upper right-hand corner and select "Product Settings" from the dropdown menu
- On the Product Settings page, click "Preferences" found under "Company Settings"
- 3. Click "Edit" beside the "Company email and calendar provider" setting
- 4. Select email provider and click "Save"





#### Individual User Enablement

#### **Authorize Email Syncing**

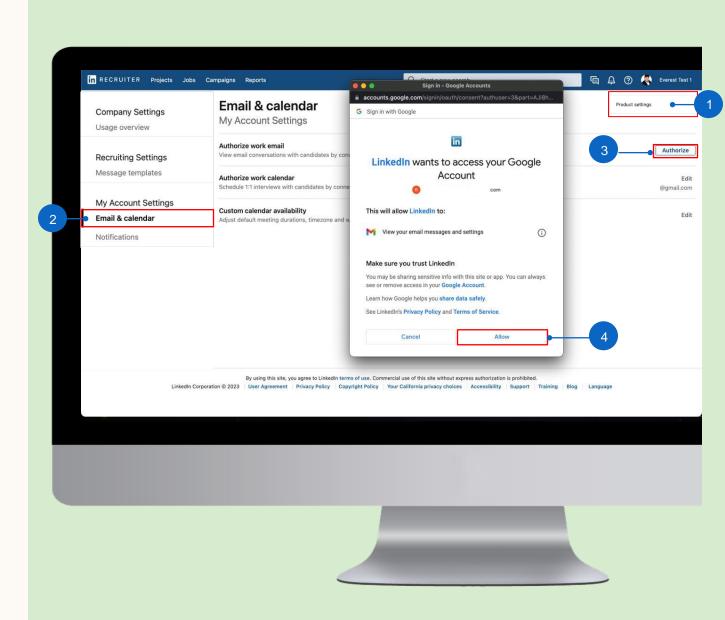
El Individual User view

Individual Users will only be able to authorize their work email once the Recruiter Admin has enabled the integration on the contract-level (see previous slide):

- Click your picture in the upper right-hand corner and select "Product Settings" from the dropdown menu
- 2. On the Product Settings page, click "Email & calendar" found under "My Account Settings"
- 3. Click "Authorize" beside the "Authorize work email" setting
- 4. Once the pop-up box appears, click "Allow" to complete the email sync authorization process.

If you are unable to authorize, connect with your Recruiter Admin and IT Admin to ensure the proper permissions have been granted to enable Email Syncing.





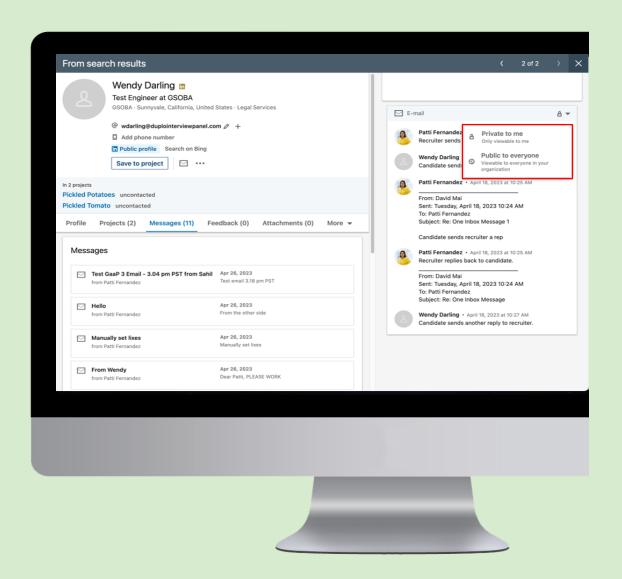
**Email Syncing in Action** 

### View and share specific message threads

Email Syncing makes it easy to share candidate conversations between a Recruiter User and a candidate with other team members.

Individuals can manage the privacy of their message threads by making them "Private to me" or "Public to everyone".

- Candidate needs to have a LinkedIn profile
- Candidate needs to be saved to a project



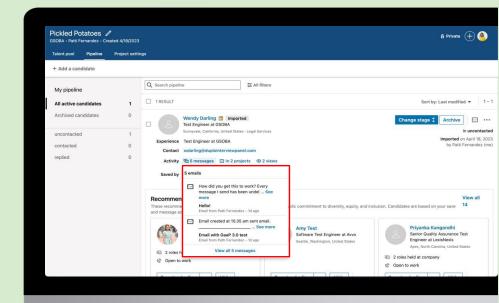


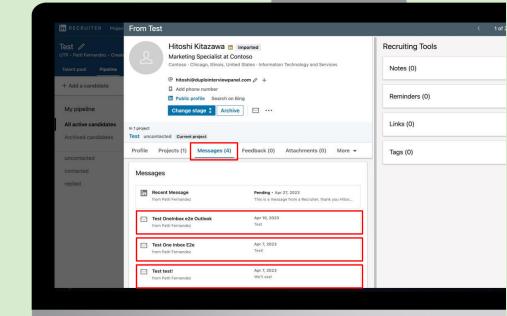
**Email Syncing in Action** 

### Discover conversations with candidates

Once Email Syncing has been enabled, emails sent from a Recruiter user's work email inbox will automatically sync in Recruiter.

- Recruiters can view message activities on candidate profiles within the pipeline
- Recruiter user emails can be viewed under the messages tab on the candidate's profile
- Replies between the candidate and Recruiter user will appear under the same email thread

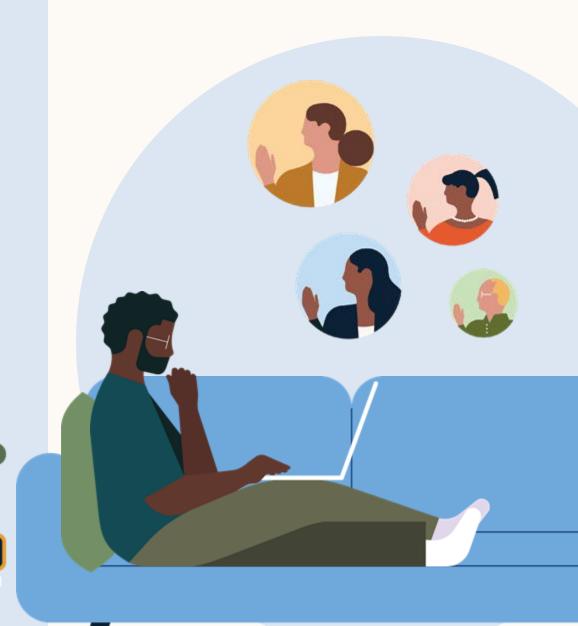








# FAQ



#### Setup & Enablement

#### What Email and Calendar Providers can be used for these integrations?

• We support Microsoft O365 and Google Workspace as providers for this integration. Help Center Resource

#### How do I turn this integration ON for my Recruiter user account?

• Once your Azure or Google Workspace IT Admin has integrated Recruiter and your Recruiter Admin has selected a provider, you can go to Product settings > My account settings > Email and calendar > Work Email > Authorize. Help Center Resource

#### Can I use my personal email, or do I have to connect my company email?

• While it may be possible to connect your personal email, we recommend using your company email, as your personal email may contain private conversations that you may not want to sync to Recruiter. Help Center Resource

#### Can I authorize a group / shared mailbox that my recruiting team uses for hiring?

- A full-fledged Google or Microsoft email account with an inbox and calendar is required. You cannot use an alias or an email address without an inbox or calendar. This allows us to integrate with the account and request for the appropriate access permissions to use email and calendar features.
- If you do have a full-fledged shared email account, we recommend only one user integrate it with Recruiter and set the privacy settings for each synced email to be shared with the contract. Multiple users integrating the same email account on your contract may result in duplicate emails imported.

  Help Center Resource



#### Usage

#### What is the value of this integration and how will it affect my workflow?

• Email syncing gives recruiters a more comprehensive view of their communication history with candidates and cuts down on timeswitching between platforms. It is designed to elevate team collaboration by allowing your recruiters to share specific candidate conversations all in one place, which improves overall team visibility and transparency when making hiring decisions. This added context can increase hiring efficiency and result in more tailored outreach, which in turn improves the candidate experience. Help Center Resource

#### Which of my emails will be synced to Recruiter?

- If an email in your inbox is determined to be to or from a candidate in your contract, they will be added to your messages with that candidate. At this time, we only sync emails from email addresses that are associated with a member's Linkedln profile and from members that have their profile discovery setting by email set to "Anyone on Linkedln." In addition, we ignore any emails that use the same domain as the email you authorized with (e.g. if your email domain was @xyz.com, then and emails to/from an email address using the @xyz.com domain would not be synced).
- For more technical details around what data we process and store, see the <admin FAQs/Security overview link>. Help Center Resource

#### How long does it take for an email to sync from my email inbox to Recruiter?

• If an email satisfies the conditions for it to be synced, it should sync near real-time. However, if the email doesn't appear instantly, we recommend waiting at least 20 minutes before troubleshooting. Help Center Resource



#### Usage

#### Do candidates need to be saved to a project for email messages to sync over into Recruiter?

• Yes, candidates need to be saved to a project in Recruiter for email syncing to take place. Help Center Resource

#### Who can see the emails that are brought into Recruiter?

- Once an email is matched and stored, the visibility of the email in Recruiter is automatically set to Private to me. The owner of the email can determine whether they want to keep the email private or change its visibility to their organization.
- Note: The admin "Inmail Default Visibility" setting has no impact on this. Even if default visibility is set to visible to everyone in the project or organization, synced emails will continue to be private until the user decides to change the visibility of each synced email. Help Center Resource

#### Who can see any InMail communications with candidates?

• The visibility of your InMail communications is dependent on the "InMail Default Visibility" setting available to admins and the visibility of the specific message. Help Center Resource

#### Are there ways to make sure that specific emails do not show or if we can delete emails that have synced and not have them sync again?

• No, you cannot delete or "un-sync" an email once it has synced from the Recruiter application. Deauthorizing will also not delete any previously syncing emails. However, all emails that are synced are by default private. If a user or contract would like to have these emails deleted, they would need to go make a request by following our GDPR data deletion guidelines. Help Center Resource



#### **Troubleshooting**

#### I am not able to authorize and get an error message, how do I get access to the feature?

- If you see a message regarding admin approval, your organization may not have granted the correct access to our application for you to use this feature. Please share the following information with your IT administrator or systems administrator to grant this access.
- Google integration guide Help Center Resource
- Microsoft integration guide <u>Help Center Resource</u>

If you see a message stating that you are not assigned access to the application by your admin, your organization may have granted access to specific users but not to you. Askyour administrator to add you to the list of people who are allowed to access this application.

They can reference the above guides.

- The email address you are trying to authorize may not have a mailbox or calendar associated with it (e.g., <a href="xvz@amail.com">xvz@amail.com</a> may only have a Google Drive associated with it (e.g., <a href="xvz@amail.com">xvz@amail.com</a> may only have a Google Drive associated with it and your company uses <a href="xvz@outlook.com">xvz@outlook.com</a> for email and calendar purposes, or you attempted to use an alias or team/shared inbox). Ask your Recruiter admin to ensure that the email and calendar provider selected for the contract is the provider you use for email and calendar services. In addition, ensure that you are not using an alias or an email address without an inbox or calendar. Help Center Resource
- 1. The email address you are trying to authorize may not match the provider that was selected by your Recruiter admin. Ask your LinkedIn Recruiter administrator to change the email and calendar provider for the contract to the provider you use for email and calendar services.
- 2. The email address you are trying to authorize may be hosted on-premise rather than online/on your email provider's cloud. Askyour administrator to migrate the email address so it is hosted online/on the provider's cloud.
- 3. The email address you are trying to authorize may not be hosted by Google or Microsoft. Gmail and Outlook are the only email providers currently supported.
- 4. Your organization's firewall may be configured to prevent network requests needed by the oAuth flow with your email provider. Askyour administrator to enable network requests for oAuth with your email provider.



#### **Troubleshooting**

#### Why are emails with certain candidates not appearing even though I have email syncing turned on?

• At this time, we only sync emails from email addresses that are associated with a member's LinkedIn profile and have their profile discovery setting by email set to "Anyone on LinkedIn" turned on. In addition, we ignore any emails that use the same domain as the email you authorized with (e.g. if your email domain was @xyz.com, then and emails to/from an email address using the @xyz.com domain would not be synced). Help Center Resource

#### What can I do to troubleshoot any emails that are not syncing?

Here are a few options:

- a. Ensure that the email address that the candidate is using to communicate with you is the same email address associated with the candidate's LinkedIn profile
- b. Check to see that the candidate email address does not have the same domain as the email address you authorized with, as we ab not sync emails to/from email addresses with the same domain.
- c. Try reauthenticating by navigating to Product settings > My account settings > Email and calendar > Work email, deauthorizing and then reauthorizing.
- d. Confirm with your IT Admin (Google Workspace or Azure admin) and Recruiter Admin that no changes were made to the integration permissions or settings on their end.



### Questions?

You can find more information in the Help Center

Have additional questions? Please reach out to your LinkedIn account team



