

# LinkedIn Sales Navigator for Salesforce Installation Guide: Lightning View



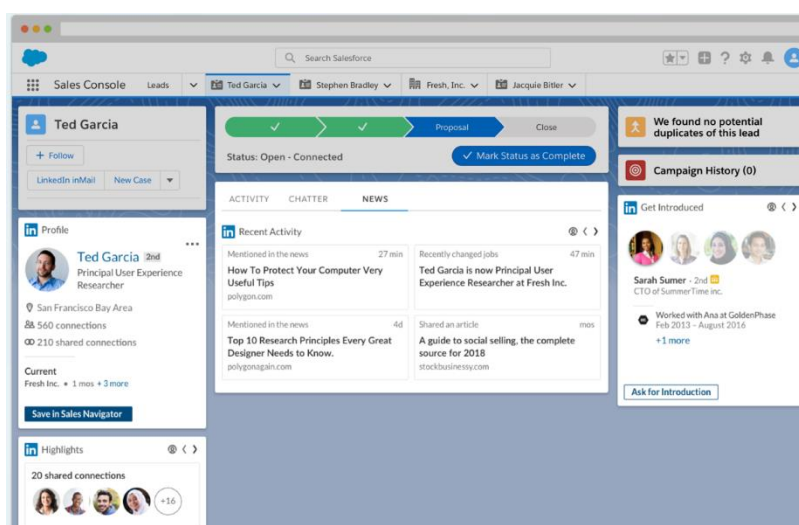
SALES NAVIGATOR

The installation process will take less than 30 minutes.

**Note:** This guide is for Salesforce Lightning. If you need to install Classic, please review the guide [here](#).

## The LinkedIn Sales Navigator for Salesforce Application

- Allow Sales Navigator seat holders to search for people on LinkedIn and view profile details including photos, current roles, and work history from within Salesforce.
- Uncover the best way to get introduced through TeamLink.
- Find new leads directly in Salesforce with Lead Recommendations.
- Get Account & Lead Updates including news mentions and job changes when viewing accounts in Salesforce.
- Send InMail, messages, and customized connection requests from within Salesforce.



## Table of Contents

- [Before You Begin](#)
- [Phase 1: Install the Application](#)
- [Phase 2: Application Set Up](#)
- [Phase 3: Test the Application](#)
- [Additional Information and Troubleshooting Tips](#)

## Recent Updates (This includes feature changes for Sales Navigator since the last Quarter Release)

- Now available for Person Account types. Embedded profiles (Widget) will work for both Lightning and Classic versions of Salesforce.
  - **Note:** CRM Sync does not support Person Account types (inclusive of Write-back and Autosave Person Accounts as a contact).

## KEY CALLOUTS

- **Note:** Installation of Sales Navigator will create new Record Types for Tasks and assign custom defaults. If you do not have “Task” **Record Types** created, **this can cause Record Types for Global Actions (e.g. New Event, Log a Call, New Task, etc.) to default to "--Master--" which would remove existing Global Actions from the Activities list.**
- If after enablement you find that Global Actions are missing, please take the following steps:
  - To Start this process, navigate to **Objects and Fields** in the Setup menu using “Quick Find”. Next, click **Object Manager** followed by **Task**. From here, click on **Record Types** followed by “**New**” in top right corner.
  - Create a new Record Type labeled “**Generic Task**” or desired custom name. Make it **Active** and Enable for desired profiles.
  - Next, from the Setup menu “Quick Find”, navigate to **User Interface** and then click **Global Actions**.
  - Click “**Edit**” for each of the missing Global Actions, then click on the **Record Type** drop down menu. Select the custom **Generic Task** you previously created and then **Save**.
- **Note:** If you previously created a custom or generic Task for Record Types, this should not have any impact on you. Please double check to ensure custom Task is set as the default post installation of Sales Navigator.

## Before You Begin

- Please note that by installing this application, you are NOT enabling [CRM Sync](#). To enable Sync, please complete this installation and visit the admin settings within Sales Navigator.
  - The application is only compatible with Enterprise, Performance, Unlimited, Developer and Professional editions of Salesforce. (**Note:** This is **NOT** compatible with Salesforce1)
  - Available for Leads, Contacts, Business Accounts, Person Accounts and Opportunities.
  - You will need to be a Salesforce administrator to install the application.
  - If you do not have My Domain enabled in your Account and would like to use the Lightning Page Components you will need to enable My Domain (see **Enable My Domain**, below) before continuing to support additional security requirements.
  - You will need a LinkedIn account. [Join now](#).
  - You will need to sign your team up for LinkedIn [Sales Navigator Team](#) or [Sales Navigator Enterprise](#) edition.
  - We recommend having a Sales Navigator Administrator + Team Member seat to complete the installation, however you may use a Sales Navigator Administrator seat.
  - You will need to use a JavaScript enabled browser.
- Note:** To review the Sales Navigator for Salesforce application in the Salesforce app exchange please visit: [Sales Navigator for Salesforce](#).

## Phase 1: Install the Application

1. Download the latest version of Sales Navigator for Salesforce and sandbox.
2. Choose a security level. We recommend choosing, **Grant access to all users** but you may wish to limit access to certain profiles and users for whom you have already provisioned Sales Navigator Team licenses. Click **Install**.
  - **Note:** Users will need a provisioned Sales Navigator Team or Enterprise account to use the application.

3. You will see one of two screens:
  - a. An **Install Complete** screen will appear. Move on to domain setup steps below.
  - b. A **Processing** screen will appear. You will be sent an email when the installation completes, at which point you can move on to Phase 2.

**Note:** If you get any errors during the installation process please take the needed steps to troubleshoot according to the error message.

**Upgrade SN for SFDC**  
By LinkedIn Sales Navigator

An earlier version is installed. It can be upgraded while preserving the existing data.  
Installed: Winter 2018 API 2 (2.17) New Verion: 2.19 (2.19)

☐ Install for Admins Only ☒ Install for All Users ☐ Install for Specific Profiles...

**Upgrade** **Cancel**

App Name	Publisher	Version Name	Version Number
SN for SFDC	LinkedIn Sales Navigator	2.19	2.19

[Additional Details](#) [View Components](#)

**Upgrade SN for SFDC**  
By LinkedIn Sales Navigator

**Upgrading and granting access to all Users...**

App Name	Publisher	Version Name	Version Number
SN for SFDC	LinkedIn Sales Navigator	2.19	2.19

[Additional Details](#) [View Components](#)

**Upgrade SN for SFDC**  
By LinkedIn Sales Navigator

**Upgrade Complete!**

**Done**

App Name	Publisher	Version Name	Version Number
SN for SFDC	LinkedIn Sales Navigator	2.19	2.19

## Enable My Domain:

**Note:** The Enable My Domain step is required for security reasons.

1. Type **Domain** in the **Quick Find** panel and select **My Domain** from below **Company Settings**.
2. **Choose Your Domain Name.**
3. **Check Availability.**

**Setup** **Installed Packages**

**Installed Packages**

Any AppExchange app you install, including, but not limited to, custom apps and components, will be installed in your environment. (AppExchange.com/About/About/About/About)

Apps and components are installed in packages. Any custom apps, data, and custom objects are initially marked as "In Development" and are not deployed to your users. This allows you to test and customize before deploying. You can deploy the components manually using the other features in Setup or as a group by clicking Deploy.

Depending on the app, you may be able to install a package, you may take actions before installing this package.

To remove a package, click Uninstall. To manage your package licenses, click Manage Licenses.

Action	Package Name	Publisher	Version Number	Namespace Prefix	Status	Activated Licenses	Used Licenses	Expiration Date	Install Date	License	App	Type	Object	AppExchange Ready
<a href="#">Uninstall</a>	Standard Salesforce CRM	Salesforce.com	1.19	sf_000000	Active	0	0	N/A	1/1/2018 12:00 AM	0	0	0	0	Passed
<a href="#">Uninstall</a>	LinkedIn Sales Navigator	LinkedIn Sales Navigator	2.19	LD	Active	0	0	Does Not Expire	6/14/2017 2:10 PM	0	1	0	1	Passed

**Uninstalled Packages**

No uninstalled package data exists.

4. If your domain is available, click **Register Domain**.
5. Wait for domain to be published (less than 2 minutes).
6. Click **Log in** to test your domain.
7. In the **Navigate to this page?** pop-up window that appears, click **Open**.
8. When you've completed testing, click **Deploy to Users**.
9. In this pop-up box that appears, click **OK**.

When your domain is fully deployed, you'll move to step 4 and can edit your domain settings, if required.

The image shows a sequence of four screenshots from the Salesforce 'My Domain' setup interface, illustrating the progression from choosing a domain name to final deployment and settings.

**Step 1: Choose Domain Name**  
This screen shows a flowchart with four steps: 'Choose Domain Name', 'Domain Registration Pending', 'Domain Ready for Testing', and 'Domain Deployed to Users'. The first step is highlighted. Below the flowchart, there is a text input field for 'Choose Your Domain Name' and a note: 'Enter a domain name and check whether it's available. Be sure of your name before registering. Only Salesforce Customer Support can change your domain name once it's registered.'

**Step 2: Domain Registration Pending**  
This screen shows the same flowchart, but the second step, 'Domain Registration Pending', is highlighted. A note below the flowchart says: 'Domain registration is pending. Please wait for the domain to be registered with the Internet.'

**Step 3: Domain Ready for Testing**  
This screen shows the same flowchart, but the third step, 'Domain Ready for Testing', is highlighted. Below the flowchart, it says: 'Test domain URL. Then deploy to users.' The domain name 'salesnavigator216v216-dev-ed.my.salesforce.com' is displayed. There is a 'Log in' button and a note: 'Your domain name is ready. Log in to test it out.' Below that, it says: 'To test your new domain, click tabs and links. If you've customized the UI, check for hard links to your original URL.' A yellow banner at the bottom says: 'Log in with your domain URL to deploy your domain.' There are buttons for 'Deploy to Users' and 'Roll out the new domain to your org.'

**Step 4: Domain Deployed to Users**  
This screen shows the same flowchart, but the fourth step, 'Domain Deployed to Users', is highlighted. Below the flowchart, it says: 'Edit My Domain Settings.' The domain name 'salesnavigator216v216-dev-ed.my.salesforce.com' is displayed. Below that, there is a section for 'My Domain Settings' with an 'Edit' button. The settings include 'Login Policy' (Prevent login from https://login.salesforce.com) and 'Redirect Policy' (Decide whether to redirect anyone who uses bookmarks and links that contain your previous instance-specific domain: Redirect to the same page within the domain).

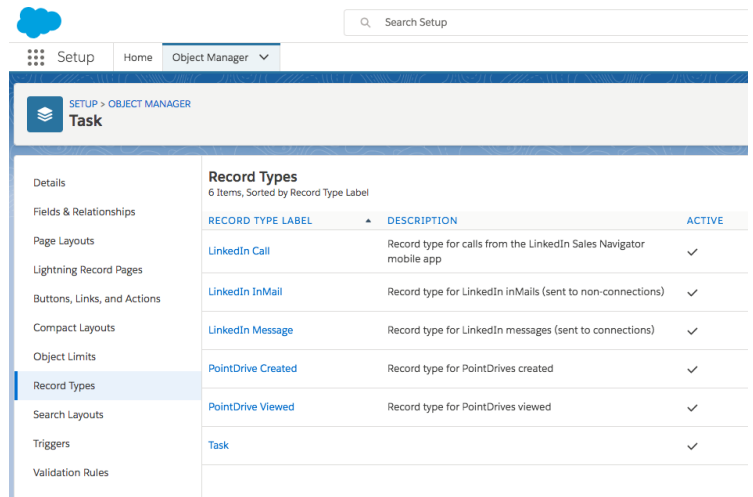
## Phase 2: Application Set Up

Remove the ability for LinkedIn Tasks to be created by internal Salesforce users:

1. In the **Quick Find** panel that appears on the left-hand side of your screen, type **Profiles**, and select **Profile**.
2. Click into your first Profile that is NOT System Admin and was selected during installation.
3. Scroll down to **Record Type Settings** (Click into **Object Settings** if you have the Enhanced View).
4. Find the **Tasks** section and click Edit Link. (**Note:** If you have the Enhanced View, select **Tasks**.)
5. Move the LinkedIn **Record Types** listed below from “Selected” to “Available”.
  - o LinkedIn Call
  - o LinkedIn InMail
  - o LinkedIn Message
  - o PointDrive Created
  - o PointDrive Viewed

(**Note:** If you have the Enhanced View, remove the checkmarks under the **Record Types** column for those items)

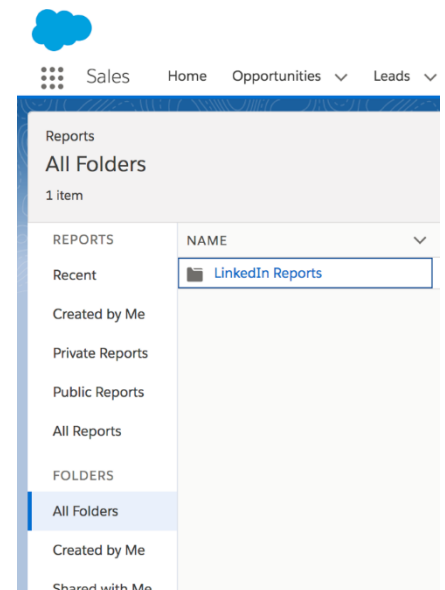
6. Repeat for all Profiles (DO NOT REPEAT FOR THE SYSTEM ADMIN PROFILE.)



## Give users access to the LinkedIn Activities Report Folder

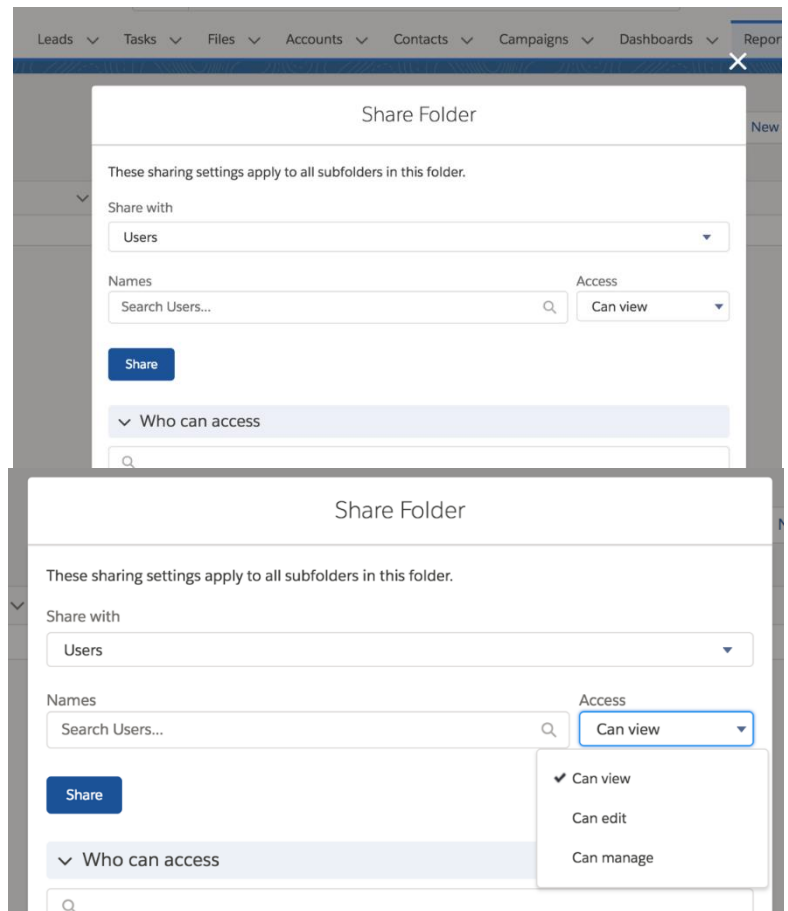
**Note:** You will need to give access to the Unresolved LinkedIn Activities Folder to all users who will be responsible for the management of incoming LinkedIn Activities.

1. Navigate to your **Reports** tab.
2. In the **Report Folders** panel on the left-hand side of your screen find the **LinkedIn Reports** folder.
3. On the report folder, navigate to the down arrow on the far right of the LinkedIn Folder column
4. Select **Share** from the drop down



1. Click either **Users**, **Roles** or **Roles and subordinates** to share this folder with the proper users based on your organization's security model.
2. Search for the **Users** or **Roles** you want to share with and then click the **Share** button next to their name.

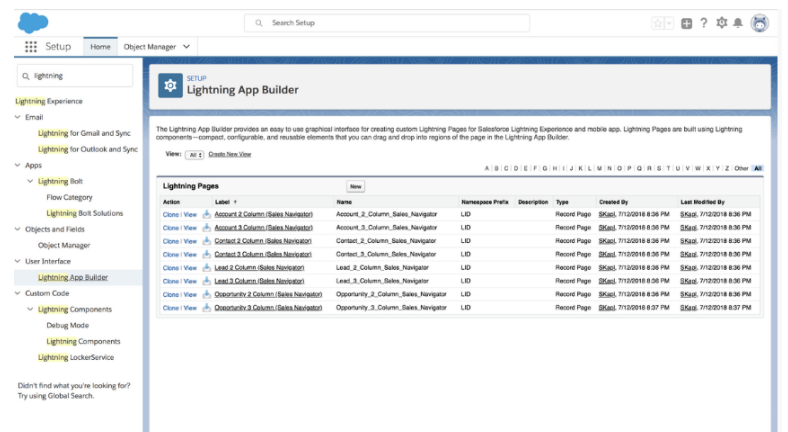
3. Under the **Access** column click the downward arrow and give the proper access. We recommend **Can View**, but if you would like you users to be able to make modifications to this report, choose **Can Edit**.
4. Click the **Done** button.
5. Repeat for all Users or Roles that should have access.



## Using Out of Box Layouts for Leads, Accounts, Contacts, and Opportunities

**Note:** Users can use the existing layouts or customize them for the specific needs of their organization (see next section for detailed instructions).

1. From Setup, enter **Lightning App Builder** in the Quick Find box and select Lightning App Builder under **User interface**.
2. On this page, you will find the different layouts available for: Lead, Contact, Account and Opportunity page layouts.
3. Click into the layout you would like to modify first and how many columns you would like to show on that page layout.





- When on the desired page layout, click **Activation...**

- In the **Activation: Lead 3 Column (Sales Navigator)** pop-up window click **Assign as Org Default**.

- Click **Save**.

- Click **Pages** and select **Contact 3 Column (Sales Navigator)**.

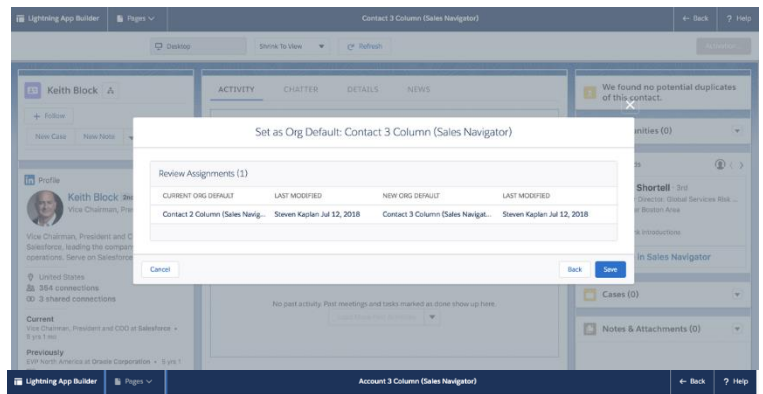
- Click **Activation...**

- In the **Activation: Contact 3 Column (Sales Navigator)** pop-up window click **Assign as Org Default**.

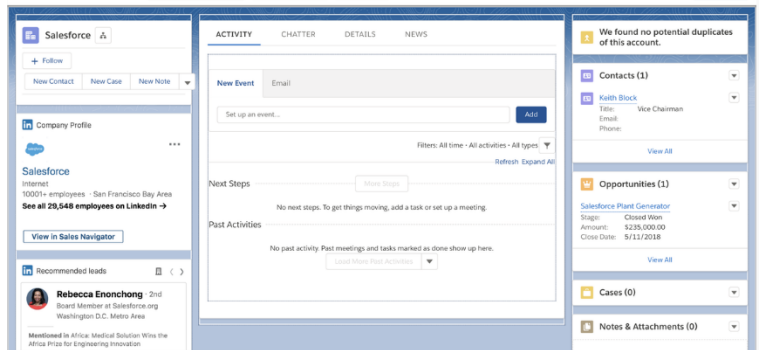
The screenshots illustrate the steps to activate and assign default pages in Salesforce Sales Navigator:

- Screenshot 1:** Shows the **Lead 3 Column (Sales Navigator)** layout. The **Activation...** button is visible in the top right corner.
- Screenshot 2:** Shows the **Activation: Lead 3 Column (Sales Navigator)** pop-up window. The **Assign as Org Default** button is highlighted.
- Screenshot 3:** Shows the **Set as Org Default: Lead 3 Column (Sales Navigator)** dialog. The **Save** button is highlighted.
- Screenshot 4:** Shows the **Contact 3 Column (Sales Navigator)** layout. The **Activation...** button is visible in the top right corner.
- Screenshot 5:** Shows the **Activation: Contact 3 Column (Sales Navigator)** pop-up window. The **Assign as Org Default** button is highlighted.

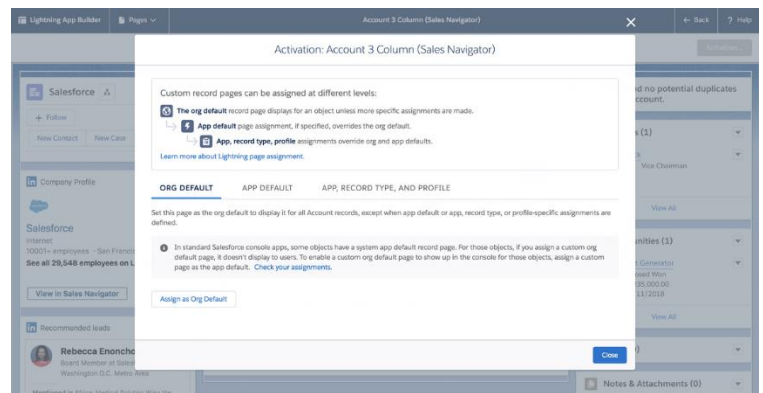
10. Click **Save**.



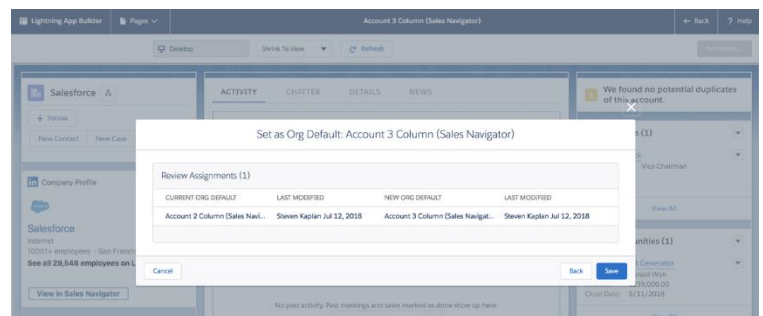
11. Click **Pages** and select **Account 3 Column (Sales Navigator)**. **Note:** Person Account pages are automatically identified with proper layout marked “PA”.
12. Click **Activation...**



13. In the **Activation: Account 3 Column (Sales Navigator)** pop-up window click **Assign as Org Default**. **Note:** Person Account pages are automatically identified with the layout above.



14. Click **Save**.



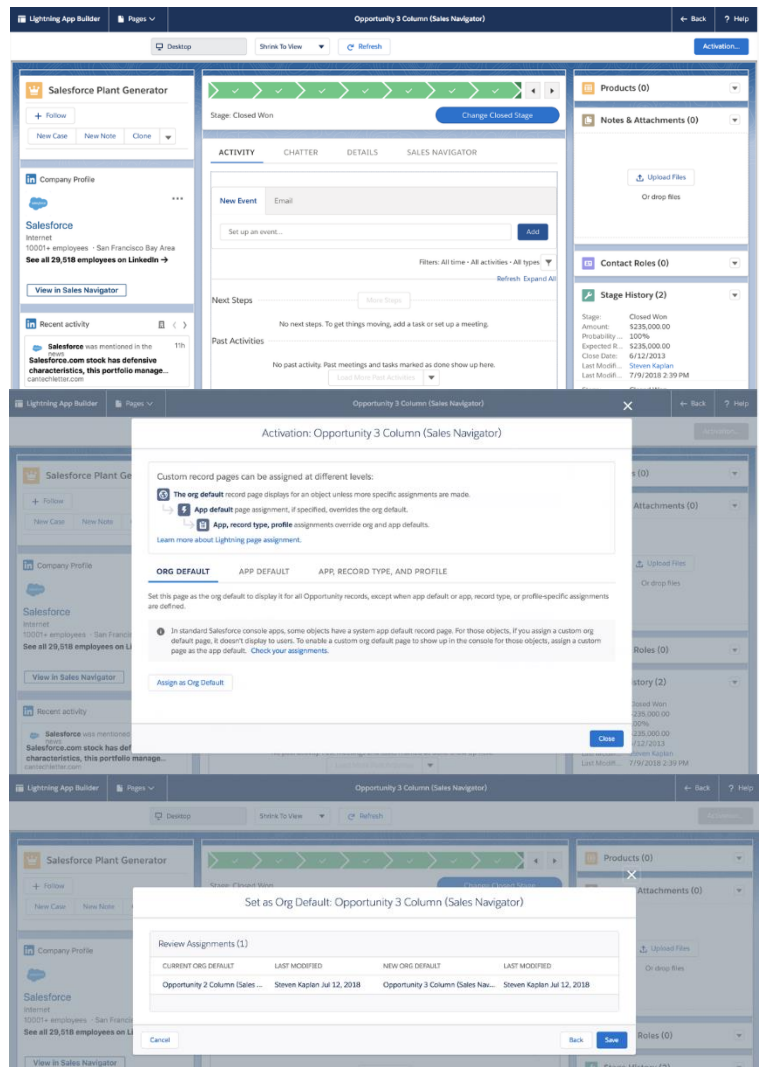


15. Click **Pages** and select **Opportunity 3 Column (Sales Navigator)**.

16. Click **Activation...**

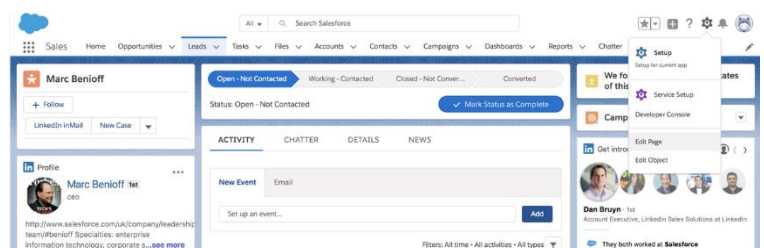
17. In the **Activation: Opportunity 3 Column (Sales Navigator)** pop-up window click **Assign as Org Default**.

18. Click **Save**.

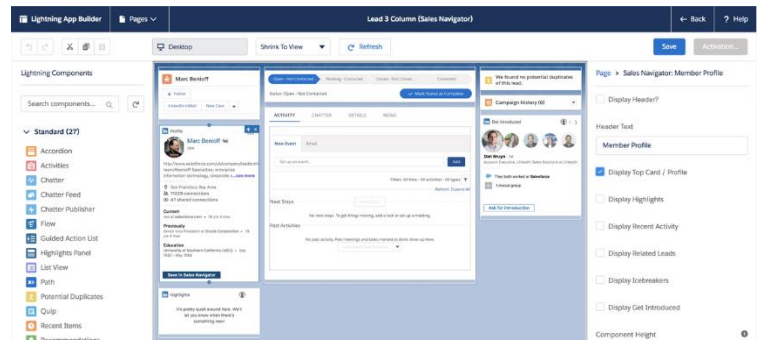


## Customizing Out of Box Layouts for Module for Leads, Accounts, Contacts, and Opportunities Records

1. From the **Leads** homepage, click **Setup** then **Edit Page**.

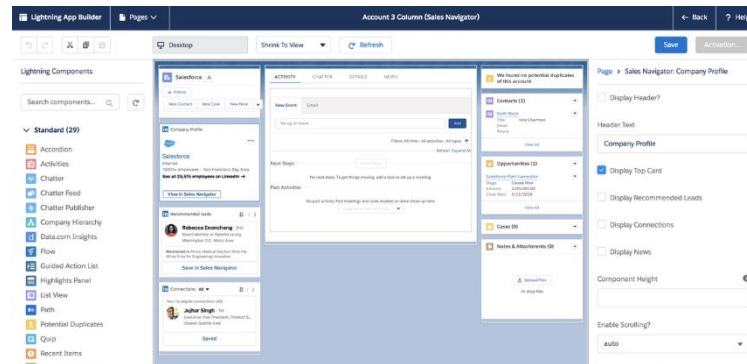


2. In the left rail, click **In Profile** box to change the member profile column.
3. When all changes are made, click **Save**.



4. In the left rail, click **In Company Profile** box to change the company profile column.

5. When all changes are made, click **Save**.

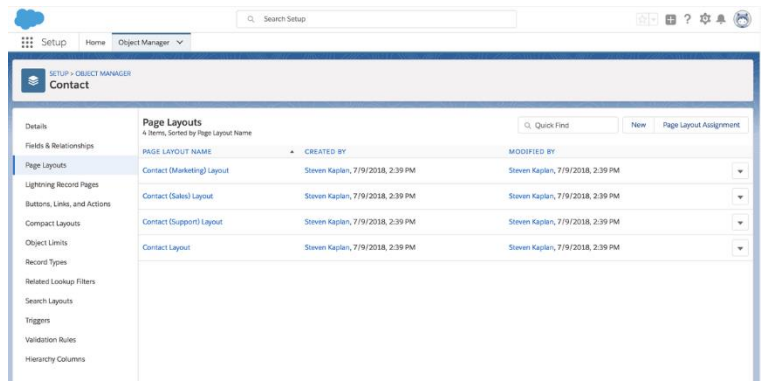


**NOTE:** Repeat the same steps for Accounts, Contacts and Opportunities customization.

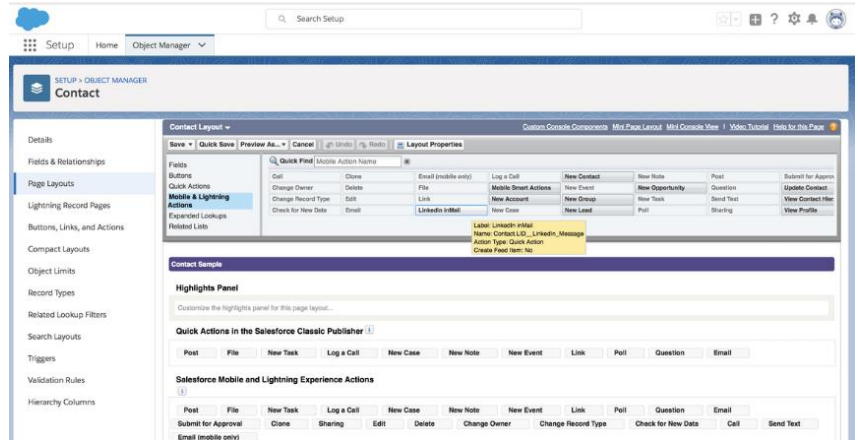
Configuring InMail Quick Actions: (**Note:** InMail Quick actions **NOT** available for Person Account types)

1. From **Setup**, enter **Object Manager** in the **Quick Find** box, and then click **Object Manager**.

- From the Object manager list, select **Contact** then **Page Layouts**.

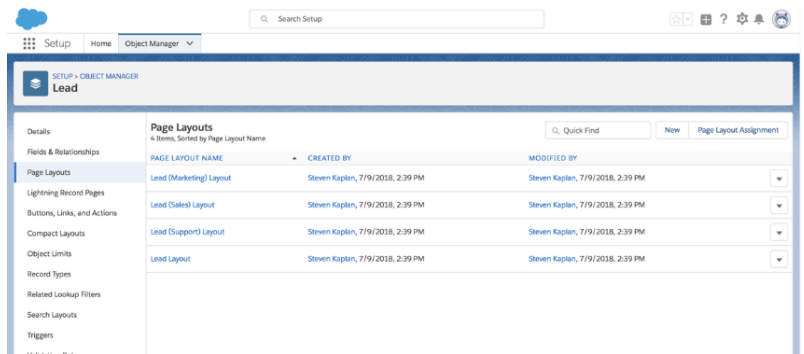


- From the **Contact Layout**, select **Mobile & Lightning Actions** then **LinkedIn InMail**.

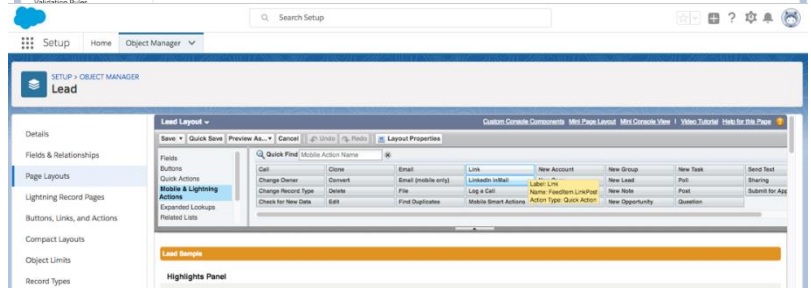


- Returning to the **Object Manager**, click **Lead** then **Page Layouts**.

- Select **Lead Layout** from the list.



- From the **Lead Layout**, click **LinkedIn InMail**.



## Phase 3: Test the Application

### Congratulations!

You have finished installing and deploying the Sales Navigator for Salesforce application. Please ensure your team has been granted their LinkedIn Sales Navigator Team or Enterprise seats to view the application in Salesforce.

To view the Sales Navigator for Salesforce application, please go to a lead, contact, opportunity, or company record in Salesforce. For your first time viewing the application, you will be asked to login to your LinkedIn profile. Your LinkedIn login will not be required after your initial login. Your experience will match the initial images on Page 1.

**KEY CALLOUTS:** As directed on page 2, Installation of Sales Navigator may have resulted in removal of previously used Global Actions. Please check to see if Global Actions (e.g. **New Event, Log a Call, New Task, etc.**) still appear in Lightning Experience Activities tab. If not, please reference page 2 or the following article to fix it: [Global Actions Restore](#)

**NEXT STEP:** We highly recommend you proceed to enabling the CRM Sync from within the Sales Navigator Admin settings. (**Note:** requires Sales Navigator Teams or Sales Navigator Enterprise). You may find further information [here](#).

- Sync and write-back functionality is **NOT** supported with Person Account Types.
- Salesforce Professional Edition requires **API Access Enabled** in order for CRM Sync functionality to work (an additional purchase may be required. Contact Salesforce for more details.)

#### CRM Sync for Sales Navigator:

- Automatically imports Accounts, Leads, and Contacts into Sales Navigator associated with open Opportunities in your CRM.
- Saves information you create in Sales Navigator directly in your CRM, including InMails, Messages, and Notes, with optional write-back.
- Enablement requires less than 10 minutes.

For further information regarding CRM application, CRM sync, and CRM security and technical documentation, along with using your CRM for Seat Management in Sales Navigator, please visit [here](#).

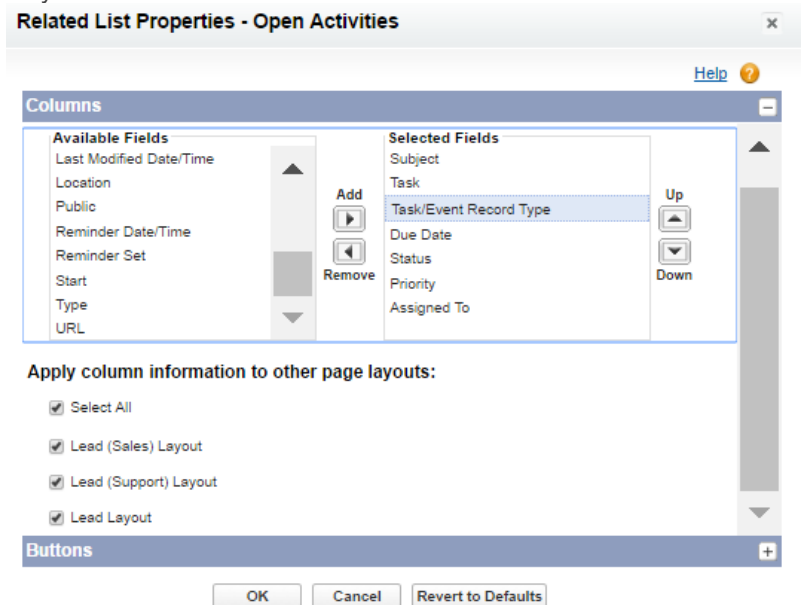
If you have additional questions or require assistance, you can reach LinkedIn Sales Solutions support at <https://www.linkedin.com/help/sales-navigator/ask>

## Additional Information and Troubleshooting Tips

Optional: Add the Record Type to your Activities Related Lists

If you would like to add the **Activity** Record type to your Lead and Contact related lists:

1. Go to **Setup > Page Layouts > Leads > Page Layouts**.
2. Click the **Edit** link next your first page layout.
3. Scroll to the Related List **Open Activities** and click the **Wrench Icon**.
4. Move the **Record Type** field from the list of **Available Fields** to the list of **Selected Fields** by clicking the Arrows.
5. Under the **Apply column information to other page layouts**: click the **Select All** option, or choose just the page layouts relevant to this change.
6. Click the **Ok** button.
7. Repeat steps 3-6 for the **Activity History** related list.
8. Repeat steps 1-7 for the Contact object.



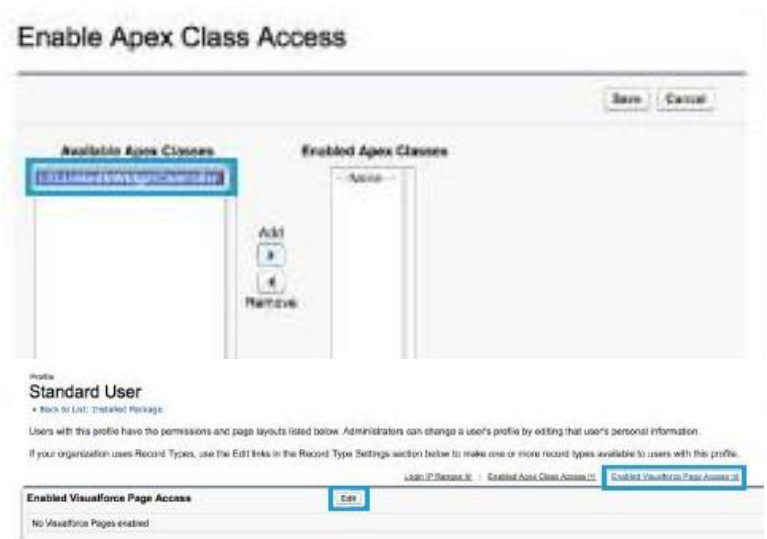
## Enabling Apex Class Access and Adding Visualforce Pages

If you did not grant access to all users in the installation step, you will need to enable Apex Class Access and add Visualforce pages to the specific profiles you would like to be able to access the application.

- **Note:** Steps 1 – 3 are only needed for Dev Orgs. Please move to Step 4 if you are not using a Dev Org.
1. Go to **Setup > Administration Setup (or Administer) > Manage Users > Profile** and select the profile for which you want to enable access to the app.



2. Hover over the **Enabled Apex Class Access** link. Select **Edit**.
3. Select the following items from the **Available Apex Classes** list, add it to the **Enabled Apex Classes** list, and select **Save**.
  - a. **LID.SalesNavigator ProfileController**
  - b. **LID.SalesNavigator ProfileHelper**



4. Hover over the **Enabled Visualforce Page Access** link. Select **Edit**.

5. Select the following pages from the **Available Visualforce Pages** list, add them to the **Enabled Visualforce Pages** list, and select **Save**.
  - a. **LID.AccountLinkedIn CompanyPage**
  - b. **LID.ContactLinkedIn CompanyPage**
  - c. **LID.ContactLinkedIn MemberPage**
  - d. **LID.LeadLinkedIn CompanyPage**
  - e. **LID.LeadLinkedIn MemberPage**
  - f. **LID.Linkedin ActivityPage**
6. Repeat steps 1-5 for every profile you would like to be able to access the application.



## Undo Lead Mapping for Previous users of the LinkedIn Sales Navigator

In previous versions of the LinkedIn Sales Navigator if you wanted the member and company associations to propagate to accounts and contacts after lead conversion, you will need to map the corresponding lead fields. You no longer need to do this. If you are installing LinkedIn Sales Navigator for the first time, please skip to Phase 6. To remove this lead mapping:

1. Go to **Setup > App Setup (or Build) > Customize > Leads > Fields**, and scroll down to **Lead Custom Fields and Relationships**. Click **Map Lead Fields**.

Lead Custom Fields & Relationships				
		New	Map Lead Fields	Field Dependencies
Action	Field Label	API Name	Installed Package	Data Type
Edit	Correlation Data	SFGA__Correlation_Data__c	Salesforce for Google AdWords	Long Text Area
Edit	CorrelationID	SFGA__CorrelationID__c	Salesforce for Google AdWords	Text(255)
Edit	LinkedIn Company ID	LID__LinkedIn_Company_ID__c	LinkedIn for Salesforce	Text(80)
Edit	LinkedIn Member Token	LID__LinkedIn_Member_Token__c	LinkedIn for Salesforce	Text(60)
Edit	Web Source	SFGA__Web_Source__c	Salesforce for Google AdWords	Text(255)



2. Select the custom fields of **LinkedIn Company Id** and **LinkedIn Member Token**, and map them to **None**.
3. Click **Save**.

## Lead Custom Field Mapping

Map each of your organization's lead custom fields to one of your custom account, contact, or opportunity fields

Lead Custom Field Mapping	
Take this lead custom field...	...and map it to this field
Current Generator(s)	--None--
LinkedIn Company Id	--None--
LinkedIn Member Token	--None--
Number of Locations	--None--
Primary	--None--
Product Interest	--None--
SIC Code	--None--

If you have additional questions or require assistance, you can reach LinkedIn Sales Solutions support at <https://www.linkedin.com/help/sales-navigator/ask>



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