Linked in

LinkedIn Sales Navigator for Salesforce Installation Guide: Lightning View



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.

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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 <u>CRM Sync</u>. 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 <u>Sales Navigator Team</u> or <u>Sales Navigator Enterprise</u> 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.
- 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:
 - 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.



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.

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- 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.



Phase 2: Application Set Up

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

- 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.
- Scroll down to Record Type Settings (Click into Object Settings if you have the Enhanced View).
- 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".
 - LinkedIn Call
 - o LinkedIn InMail
 - o LinkedIn Message
 - PointDrive Created
 - 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

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- 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.

- 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.

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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.
- Click into the layout you would like to modify first and how many columns you would like to show on that page layout.

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

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

6. Click Save.

- 7. Click Pages and select Contact 3 Column (Sales Navigator).
- 8. Click Activation...

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



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



 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.

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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.

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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**.

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

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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.

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

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Compact Layouts	Contact (Support) Layout	Steven Kaplan, 7/9/2018, 2:39 PM	Steven Kaplan, 7/9/2018, 2:39 PM	
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3. From the Contact Layout, select **Mobile & Lightning Actions** then LinkedIn InMail.

- 4. Returning to the **Object Manager**, click Lead then Page Layouts.
- 5. Select Lead Layout from the list.

6. From the Lead Layout, click LinkedIn InMail.



New Note Change

Link

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: <u>Global Actions Restore</u>

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 <u>here.</u>

- 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 <u>here.</u>

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**.
- Move the Record Type field from the list of Available Fields to the list of Selected Fields by clicking the Arrows.
- 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.

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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.
- Go to Setup > Administration Setup (or Administer) > Manage Users > Profile and select the profile for which you want to enable access to the app.

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	layouts lated below. Administrators can change a user into in the Record Type Settings section below to make		
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- 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.

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your organization uses Record Types, use the Edit links in the Record Type Settings within below to make one or more record types available to us	It this profile have the permissions and pag	e layouts listed bolow. Admin	istrators can change a us	or's profile by eating that use	rs personal information
	rgenization uses Record Types, use the Edit	links in the Record Type Set	ings aution below to mail	ke one or more record types a	willable to users with this prof

Enable Visualforce Page Access

Enable Apex Class Access

- 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:

No Visualforce Pages enables

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

lead (Cus	tom Fields & Relationships	New M	ep Load Fields Field Dependencies	
Action		Field Label	API Name	Installed Package	Data Type
Edit	Å	Correlation Data	SFGACorrelation_Datac	Salesforce for Google AdWords	Long Text A
Edit	è	CorrelationID	SFGA_CorrelationID_c	Salestorce for Google AdWords	Text(255)
Edit	d.	Linkedin Company Id	LID_Linkedh_Company_Id_c	Linkedin for Selectorce	Text(80)
Edit	è.	Linkedin Member Token	LID_LinkedIn_Member_Token_c	Linkedin for Salesforce	Text(60)
Eak		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

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	T	
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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