Linked in

LinkedIn Sales Navigator for MS Dynamics 2016 and 365 Installation Guide



The installation process will take less than 30 minutes

The LinkedIn Sales Navigator for Microsoft Dynamics application (widget)

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

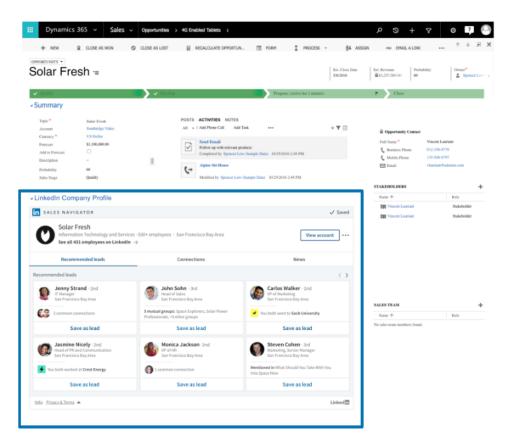


Image of completed Sales Navigator for Dynamics widget installation

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Before You Begin

- The solution works with Microsoft Dynamics 365 and Dynamics CRM 2016, versions 8.2+ and 9.x. However, certain features are only available if you are running Microsoft Dynamics 365 (online).
- This installation is required for you to enable the sync between Dynamics and Sales Navigator, including write-back from Sales Navigator to Dynamics.
- This installation is required for you to enable the sync between Dynamics 365 and Sales Navigator, including writeback from Sales Navigator to Dynamics 365.
- You will need to be a System Administrator to import and configure the solution.
- You will need a LinkedIn account. Join now.
- You will need to sign your team up for LinkedIn Sales Navigator Team or LinkedIn Sales Navigator Enterprise.
- 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 enable JavaScript in your browser. You will also need to have the most up-to-date version of Flash Player installed.
- You will need to disable your pop-up blocker in Internet Explorer or Edge.

Import the Solution

Download the LinkedIn Solution for Dynamics to a location on your computer. Do not unzip the file. Microsoft Dynamics CRM solutions are meant to be imported as a full zip file.

- 1. Log into your Microsoft Dynamics CRM environment.
- 2. Expand the Main Areas pane by selecting the drop-down at the top of your Dynamics window. *Note: Drop-downs differ in appearance in Dynamics 2016 and 365.*

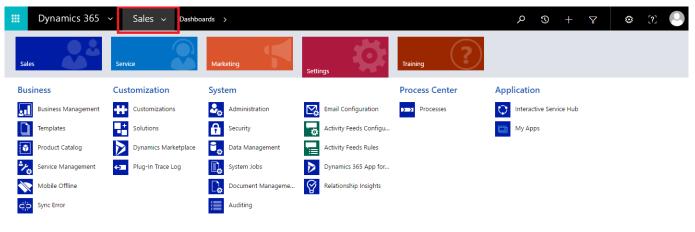


Image above is for Dynamics 365

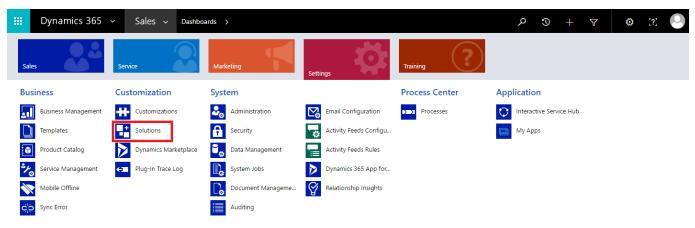
If you are using Dynamics 2016, the button to expand the drop-down will look like so:



3. Click "Settings" in the drop-down pane.

Dynamics 365	✓ Sales ∨ Dashbo	pards >			P 9 + P	o ?] 🔍
Sales	Service	Marketing	Settings	Training		
Business	Customization	System		Process Center	Application	
Business Management	Customizations	Administration	Email Configuration	Processes	Interactive Service Hub	
Templates	Solutions	Security	Activity Feeds Configu		My Apps	
Product Catalog	Dynamics Marketplace	Data Management	Activity Feeds Rules			
🍾 Service Management	← Plug-In Trace Log	System Jobs	Dynamics 365 App for			
Mobile Offline		Document Manageme	Relationship Insights			
Sync Error		Auditing				

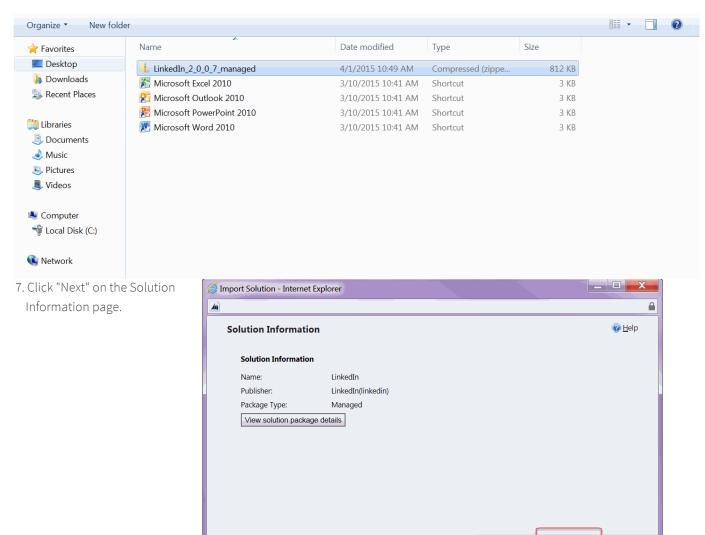
4. "Click "Solutions".



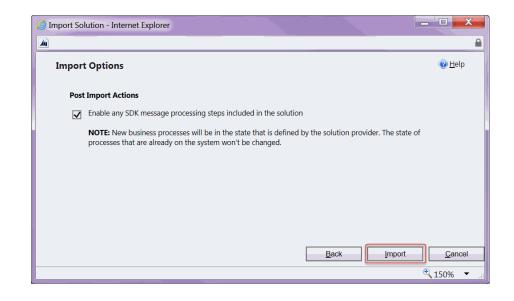
5. Click "Import"

🗰 Dynam	ics 365 ~	Settings 🗸	Solutions >	م	\Im + ∇	o [?] 🕓
All Solutior	ns ×			Search for records		Q
🐉 New 🛛 🗙 Delete	🕞 Import 📮 Expo	rt 🛛 🕞 Clone a Patch	🗄 Clone Solution 🔯 Apply Solution Upgrade 🛛 🗿 Import Translations	Second Translations Dublish All Customizations	🚯 Get Solutions from Marketplace	More Actions 👻
Name	Display Name	Version	Installed On ψ Package Type Publisher	Description		e

6. Browse for the solution file you downloaded and saved and click "Open", then "Next".



 Check the box that says
 "Enable any SDK message processing..." and click
 "Import."



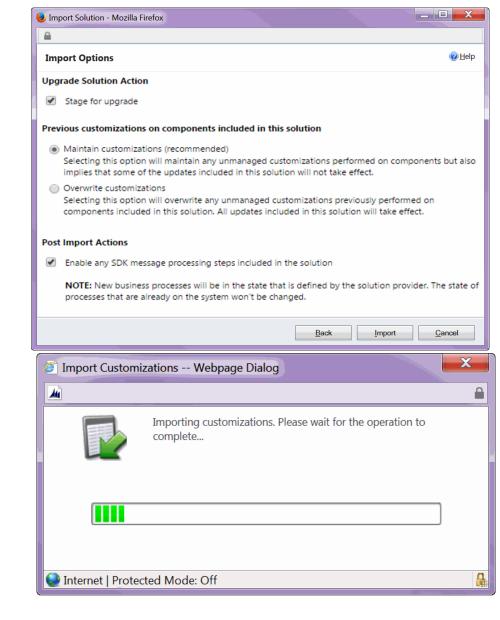
Back

<u>N</u>ext

<u>C</u>ancel [⊕] 150% ▼ Please note that if you are upgrading from an older solution, you must also select "Stage for upgrade" and "Maintain Customizations" (see image below).

9. A dialog box will pop up showing progress of the import. After the green progress bar has finished, click "Next." This may take up to a few minutes.

10. Once the import process completes, a summary window will display all the imported components, indicating the solution import completed successfully. If you are upgrading from an older solution, click on the "Apply Solution Upgrade button", otherwise click "Close."



Importing Solution

	Date Time *	Type	Display Name	Name	Status	Description	Detail	
e	09:37:35.29	Dependencies			2		None	
a	09:37:18.84	Client Extensions	Site Map		R	XML data used to control the application navigation p	None	
5	09:37:15.72	Chart		contact	2	Entity that stores a chart attached with a view.	None	
5	09:37:15.72	Chart		8_configuration	2	Entity that stores a chart attached with a view.	None	
3	09:37:15.72	Chart		lead	1	Entity that stores a chart attached with a view.	None	
b.	09:37:15.72	Chart		opportunity	2	Entity that stores a chart attached with a view.	None	
3	09:37:15.72	Chart		account	2	Entity that stores a chart attached with a view.	None	
3	09:37:09.95	Relationship			- C		None	
S,	09:37:07.06	Entity Ribbon	Opportunity	opportunity	2	30/IL data that represents the customized elements of t	None	
4	09:37:06.93	Form	Opportunity	opportunity	2	System-populated field for the XML representation of t	None	
З	09:37:06.93	Entity Messages		opportunity	12	Text that represents customized messages for an entity.	None	
	09:37:02.47	System Views		opportunity	2	Query that is saved against the database.	None	
24	09:37:02.46	Entity Ribbon	Configuration	IL_configuration	2	30ML data that represents the customized elements of t	None	
4	09:37:02.32	Form	Configuration	li_configuration	2	System-populated field for the XML representation of t	None	
	09:37:02.32	Entity Messages		8_configuration	2	Text that represents customized messages for an entity.	None	
	09:37:02.01	System Views	Configuration	B_configuration	2	Query that is saved against the database.	None	
21	09:37:01.68	Entity Ribbon	Lead	lead	12	XML data that represents the customized elements of t	None	
4	09:37:01.57	Form	Lead	lead	2	System-populated field for the XML representation of t	None	
3	09:37:01.57	Entity Messages		lead	2	Text that represents customized messages for an entity.	None	
	09:37:00.52	System Views		lead	Q	Query that is saved against the database.	None	
	09:37:00.52	Entity Ribbon	Contact	contact	2	XML data that represents the customized elements of t	None	
4	09:37:00.40	Form	Contact	contact	2	System-populated field for the XML representation of t	None	
•	09:37:00.40	Entity Messages		contact	12	Text that represents customized messages for an entity.	None	
2	09:36:58.92	Entity Ribbon	Account	account	2	33ML data that represents the customized elements of t	None	
	09:36:58.92	System Views		contact	2	Query that is saved against the database.	None	
G	09:36:58.31	Form	Account	account	12	System-populated field for the XML representation of t	None	
	09:36:58.31	Entity Messages		account	2	Text that represents customized messages for an entity.	None	
	09:36:55.45	System Views	Account	account	2	Query that is saved against the database.	None	
2	09:36:55.27	Entity	Opportunity	opportunity		Potential revenue-generating event, or sale to an acco	None	
à	09:36:54.89	Entity	Configuration	li configuration	12	Used to configure LinkedIn Integration.	None	

Download Log File Apply Solution Upgrade Close

- a. If you use Microsoft Dynamics CRM Online (URL ends in crm.dynamics.com), your import and configuration of the LinkedIn Solution is complete and you can move on to <u>Test the Solution</u>.
- b. Microsoft Dynamics CRM On-Premise environments require an additional step of registering an API key and assigning users a LinkedIn Configuration security role to use the Solution.

 Go to "Settings" → "Solutions" and click on the LinkedIn Solution.

e	Solutio	n: LinkedIn - Microsoft Dynamic	s CRM - Windows Internet Explorer -	□ ×
File 🗟 🛃 Save and Close	🖹 🛛 🖳 Export Solu	tion 📓 Import Translations 🗟	Export Translations 👔 Publish All Customizations 🔥 Actions 🗸	<u> </u>
Solution: LinkedIn				
Solution LinkedIn	LinkedIn Configu	iration		
Information Configuration	Sign Up For A Link	edin API Key		
Components Compon		for your API key. You will be asked to enter id paste the keys into the fields below.	the following information. Click "Add Application" and you will find your API key and Sec	ret Key on
Web Resources	Application Name:	LinkedIn for MS Dynamics	Linkedin, Developer Network	
+ Processes + Plug-in Assemblies Sdk Message Processing S	Description:	LinkedIn for MS Dynamics Integration for (Company Name)	Your application was successfully created. Application Datails	
Service Endpoints	Integration URL:	(Example URL where the integration will go live)	Company: Example Company, Ltd.	
Reports	JavaScript API Domain:	(Fully-qualified domain name of all pages in the integration)	Application Name: Example	
Article Templates	Application Use:	Sales (CRM), Marketing	API Key: jefermikšintas	
Email Templates	Live Status: Developer Contact	Live (Admin's e-mail)	Secret Key: 60RUUgUNIYKB0W3d	
Security Roles	Email: Phone:	(Admin's phone)	Done	
 Field Security Profiles Routing Rule Sets 	THORE.	(Romin's prone)	Liekeelin.com Home Abstil Biss Garrers Advertisins Recruitins.Solutions Texis Developers Unscode.Your.Account	
% Case Creation Rules ■ SLAs			Copyright 0 2012 Linkedin Corporation. All rights reserved. <u>User Aureement</u> <u>Etistics Police</u> <u>Casarisht Police</u>	
	Enter Your Linked	n API Key		
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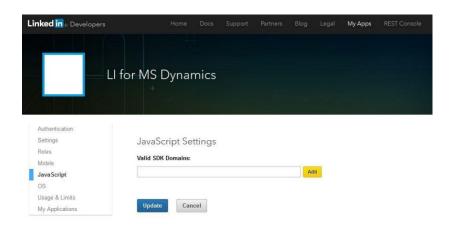
13. Click "Configuration" in the top left under "Information." Click on the "Sign up for your API key" link.

6	Solution	n: LinkedIn - Microsoft Dynam	ics CRM - Window	s Internet Explorer	- U ×
File	🖹 🛛 🖳 Export Solu	tion 🛛 🐊 Import Translations 📗	Export Translations	Publish All Customizations	Àctions ▼
Solution: LinkedIn					
Solution LinkedIn	LinkedIn Configu	ration			
🜮 Information					
Configuration	Sign Up For A Link	edin API Key			
Components Compon		for your API key. You will be asked to en d paste the keys into the fields below.	ter the following informa	tion. Click "Add Application" and yo	ou will find your API key and Secret Key on
Web Resources			Linked in 。De	veloper Network	
🛃 Processes	Application Name:	LinkedIn for MS Dynamics			
 Plug-in Assemblies Sdk Message Processing S 	Description:	LinkedIn for MS Dynamics Integration for (Company Name)	Your application Application Details	was successfully created.	
Service Endpoints	Integration URL:	(Example URL where the integration wil go live)		. 14	
Reports	JavaScript API Domain:	(Fully-qualified domain name of all pages in the integration)	Application Name: Example	(, 6.99).	
Article Templates	Application Use:	Sales (CRM), Marketing	API Key:		
Contract Templates	Live Status:	Live	jqfmmk86n1as		
Email Templates Comparison Compar	Developer Contact Email:	(Admin's e-mail)	Secret Key: 6oRbUgQNhYK80	Wed	
Field Security Profiles	Phone:	(Admin's phone)	Done		
Routing Rule Sets Case Creation Rules SLAs			Linkedlin.com Home <u>About</u> Copyright © 2012 Linkedin Corpo	Blos Gareers Advertisina Becoulina Solutions ration. All rights reserved. <u>User-Agreement</u> <u>Privac</u>	Taola Developera Uzacade Yaur Account u Police Capacitat Police
THE SLAS	Enter Your Linkedl	n API Key			
	API Key	jqfmmk86n1as			
	Secret Key	6oRbUgQNhYKB0Wsd			×
Status: Existing					Save
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- 14. If you are not logged into LinkedIn, a login page will appear. After logging in, you will see the <u>following screen</u>. Please enter the following information and click "Submit."
 - a. Company Name: <Your company name>
 - b. Name: "LI for MS Dynamics"
 - c. **Description:** "LinkedIn for MS Dynamics Integration for <your company name>"
 - d. Application Logo URL: <URL for your company's logo, which must be hosted using a secure (HTTPS) protocol (Please provide your application's logo image, in PNG or JPEG format. The image must be square and at least 80 x 80 pixels, and no larger than 5 MB in size)>
 - e. Application Use: Sales (CRM), Marketing
 - f. Website URL: <URL for your CRM On-Premise environment - You can copy and paste this URL from the browser bar when you're logged into the CRM>
 - g. Business Email: <Company email address>
 - h. Business Phone: <Company phone number>

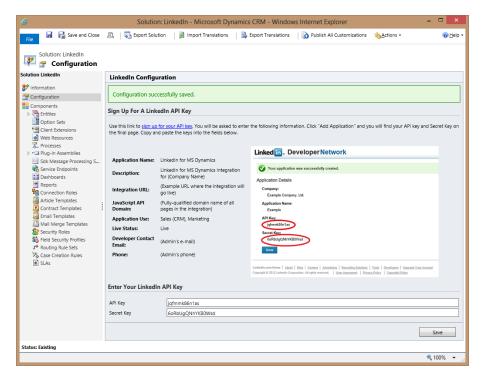
inked in © Developers			Support			My Apps	REST Console
My Applications					Crea	ate Applicat	ion
Create a New Applica	ation						
Company Name:*			_				
Name: "							
Description:*							
LinkedIn for MS Dynamics Integrati	on for <your< th=""><th>company r</th><th>name></th><th></th><th></th><th></th><th></th></your<>	company r	name>				
Application Logo URL:*							
Application Use:* Sales (CRM), Marketing v Website URL:*							
Business Email:*							
Business Phone:*							
☐ I have read and agree to the L	inkedin API	Terms of	Use.				
Submit Cancel							

- 15. The next page will display an API key and a Secret Key. Copy these values and paste them back into the CRM Configuration page.
- 16. Under Default Application Permissions, ensure that only "r_basicprofile" is checked. Click "Update."
- 17. ****This step is critical for integration.**** Click "JavaScript" on the left menu. For **Valid SDK Domains**, enter a fully qualified domain of your CRM On-Premise environment. This is the URL that you entered for **Website URL**, up until the first slash '/'. Click "Add" and then Click "Update." *Note: If you have multiple domains, then you can enter them on this page.*

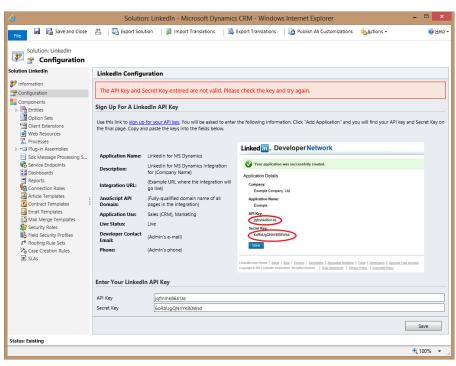


18. Return to your CRM

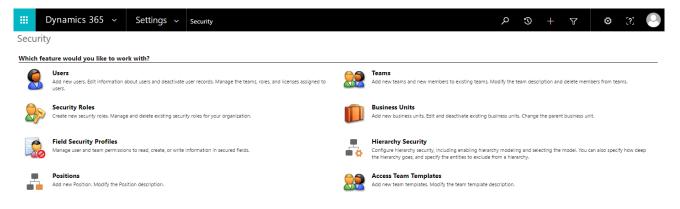
Configuration page. Click "Save" to validate the API Key and Secret Key. If your values are correct, you will see the following confirmation message. Click "OK" and move to step 20.



19. If your values are incorrect, you will see the following error message, prompting you to double check your API key values and re-save:



20. The last step is to assign all users a "LinkedIn Configuration" security role to give them access to the integration. In the All Areas drop down, navigate to "Settings" → "Security" and click on "Users".



Select all users and click "Manage Roles" at the top.

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+ NEV	N 💐 APPROVE EMAIL	REJECT EMAIL	♣ PROMOTE TO ADMIN	🎭 MANAGE ROLES	📲 CHANGE BUSINESS UNIT	😞 CHANGE M	ANAGER	📌 CHA	NGE POSIT	ΓΙΟΝ	i send di	RECT EMAIL		
₩E	nabled User	S ♥					Search fo	or records					۶	D
\checkmark	Full Name 🛧		Business Unit	Title	Position Main	Phone							T 4	e <
~	Argyris Anargyros		salesnavdev											9
~	Dave Hammarstedt		salesnavdev											Charts

A dialog box will pop up as shown in the screenshot. Check "LinkedIn Configuration" and click OK.

Manage User Roles

What roles would you like to apply to the 2 Users you have selected?

×

Role Name	Business Unit
Delegate	salesnavdev
Knowledge Manager	salesnavdev
 LinkedIn Configuration 	salesnavdev
Marketing Manager	salesnavdev
Marketing Professional	salesnavdev
Sales Manager	salesnavdev
	¥
ibility to extract your data. Access is Dynamics 365 for Outlook, Dynamics	ur users, you will enable access and the enabled through multiple clients (i.e. s 365 for tablets, web-user). You may y configuring your user's security role or

Test the Solution

Congratulations!

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

To view the Sales Navigator for Dynamics widget, please go to a lead, contact, opportunity, or company record in Dynamics. For your first time viewing the widget, 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 image on Page 1.

Next step: We highly recommend you proceed to enabling the CRM Sync. You may find further information here.

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/widget, 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 at https://www.linkedin.com/help/sales-navigator/ask

Optional - Setting up Role-Based Forms

You have the option to limit the LinkedIn integration to only a subset of users by creating additional forms. You can alter the default "Information" form to remove the LinkedIn member and company profiles, and then create a new "LinkedIn Integration" form with the profiles present.

1. In the All Areas menu, click "Settings" → "Customizations" and choose "Customize the System."



2. Go to "Entities" and select the entity you want to customize. This example will customize "Opportunity."

Entities	n							
fault Solution	Component Type Entity				~	View Customia	able	
tion nents	🗟 New 🛛 🗙 Delete 🛛 👌 Publis	sh 🛛 🖷 Show Dependencies	Managed Properties					
ities	✓ Display Name ↑	Name	Schema Name	State	Customizable	Audit Status	Description	
on Sets nt Extensions	Account	account	Account	Managed	True	Disabled	Business that represents a customer or potential custome	
Resources	Activity	activitypointer	ActivityPointer	Managed	True	Non Applicable	Task performed, or to be performed, by a user. An activity	
esses in Assemblies	Address	customeraddress	CustomerAddress	Managed	True	Disabled	Address and shipping information. Used to store addition	
Message Processing S	Appointment	appointment	Appointment	Managed	True	Disabled	Commitment representing a time interval with start/end ti	
ce Endpoints boards	Article	kbarticle	KbArticle	Managed	True	Disabled	Structured content that is part of the knowledge base.	
rts iection Roles	Article Template	kbarticletemplate	KbArticleTemplate	Managed	True	Non Applicable	Template for a knowledge base article that contains the st	
e Templates	🗯 Business Unit	businessunit	BusinessUnit	Managed	True	Disabled	Business, division, or department in the Microsoft Dynami	
ract Templates I Templates	Campaign	campaign	Campaign	Managed	True	Disabled	Container for campaign activities and responses, sales lite	
Merge Templates	💖 Campaign Activity	campaignactivity	CampaignActivity	Managed	True	Disabled	Task performed, or to be performed, by a user for plannin	
rity Roles Security Profiles	🥵 Campaign Response	campaignresponse	CampaignResponse	Managed	True	Disabled	Response from an existing or a potential new customer fo	
		incident	Incident	Managed	True	Disabled	Service request case associated with a contract.	
	Case Resolution	incidentresolution	IncidentResolution	Managed	True	Disabled	Special type of activity that includes description of the res	
	a Competitor	competitor	Competitor	Managed	True	Disabled	Business competing for the sale represented by a lead or	
	Competitor Address	competitoraddress	CompetitorAddress	Managed	True	Disabled	Additional addresses for a competitor. The first two addre	
	Configuration	li_configuration	li_configuration	Managed	True	Disabled	Used to configure LinkedIn Integration.	

3. Go to "Forms" and open the "Information" form.

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nt 🔨 🗌 New - 🗙 🛚 🥵 Enable S		Drder 👻 More Actic	ns 🗕 🛃 Activate	📓 Deactivate	
nt Channel nt Template Name	Form State	Form Type 🛧	State	Customizable	Description
nt Templa LinkedIn Integration	Active	Main	Unmanaged	True	A form for this entity with access to the LinkedIn Integration
quipment Opportunity	Active	Main	Managed	True	Updated default Opportunity form
nission V Information	Active	Main	Managed	True	A form for this entity.
Information	Active	Mobile	Managed	True	This is the form that is displayed for the CRM Mobile application.
ric Opportunity	Active	Quick Create	Managed	True	Default quick create form for Opportunity

4. Click "Save As" and rename the form to "LinkedIn Integration." Include a description: "A form for this entity with access to the LinkedIn Integration," and click "OK."

🤗 Form: Opportunity - Internet Expl	orer						X
<u> </u>							
FILE HOME INSERT			Microsoft Dynamics CR	4		Chris Luettel 🥝 LinkedIn 🚕	
Save As Save and Clo Save Publish Save	e Remove es Edit	Body Elect	Business Form Prev Rules Properties	Show Dependencies	Merge Forms Upgrade		
Information What's New General	Form: Opt	fault Solution	e Dialog	×	ן	Field Explorer Filter All Fields	> >
LinkedIn Member Profile Line Items	🔒 Header	<u></u>		a	^	Only show unused fields	
LinkedIn Company Profile	Potential Customer	Save As		,		Account	^
Documents		Enter a name and	I description for the new	torm.		Actual Revenue	
Products	What's New	Name *	LinkedIn Integration			Actual Revenue (Base) Budget	
Closed Activities	General	Description	A form for this entity LinkedIn Integration	with access to the		Budget Amount	
Relationships Connections	Opportunity Informa	-				Budget Amount (Base)	
Documents	A Topic *					Complete Internal Review	
Audit History	Potential Custome					Contact	
Orders		h 🎱 Internet Protecte	OK			Created By	
Invoices		h 💓 Internet Protecte	d Mode: Off	<u>A</u>	J	Created By (Delegate)	
Competitors Service	Description					Current Situation	
						Customer Need	~
Marketing					~	New Field	

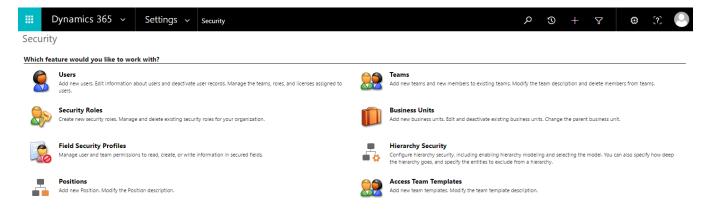
5. Click "Enable Security Roles" at the top. A dialog box will pop up as shown in the screenshot. Check "LinkedIn Configuration" and click OK.

Form: Opportunity - Internet Exp					-
FILF HOME INSERT		Microsoft Dynamics CRM		Chris Luettel 🕜 Linkedin 🚕	
Save As Save and Close D Publish	Assign Security Roles: Linkedin Integration Web	Page Diales			
Save	A		₽	Field Explorer	>
- What's New - General - Linkedin Member Profile - Line Items	Assign Security Roles: I Select the security roles for which this form will		?	Filter All Fields	~
- Linkedin Company Profile 🛛 💙	Display to everyone Display only to these selected security roles			Account	
Common A	Display only to these selected security roles Name	Business Unit		Actual Revenue	
Products	Activity Feeds	inkedintest		Actual Revenue (Base)	
Activities	4		^ -	Budget	-
Closed Activities	CEO-Business Manager	linkedintest		Budget Amount	
B Relationships	CSR Manager	linkedintest		Budget Amount (Base)	
S Connections	Customer Service Representative	linkedintest		Complete Internal Review	
Documents	Delegate	linkedintest		Confirm Interest	
Audit History	 LinkedIn Configuration 	linkedintest		Contact	
Sales	Marketing Manager	linkedintest	~	Created By	
Orders 0	1 - 16 of 16 (3 selected)			Created By (Delegate)	
invoices	Fallback			Created by (Deregate)	
Competitors	Enabled for fallback			Created On	
Service				-	
Marketing				Customer Need	~
~		OK	Cancel	Customer Pain Points	-

6. Click "Save", "Publish", and "Save and Close" in the top left to save your changes.

File Home Insert		Microsoft Dynamics CRM					
File Home Insert Save As Save and Close Publish Save	Change Properties Edit	Body Header Body Footer Navigation Select	Form Preview Properties	Assign Security Roles Show Dependencies Managed Properties Form			
LinkedIn Integration Record Wall General	Solution: Defaul						

- 7. Open the "Information" form.
- 8. Select the "LinkedIn Member Profile" form and click "Remove."
- 9. Repeat step 8 for "LinkedIn Company Profile."
- 10. Click "Save", "Publish", and "Save and Close" in the top left to save your changes.
- 11. Repeat for other entities and forms if desired.
- The last step is to assign the subset of users a "LinkedIn Configuration" security role to give them access to the integration. Go to "Settings" → "Security" and click on "Users".



13. Select the users you want to give access to the LinkedIn Integration and click "Manage Roles" at the top.

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₩E	nabled User	s ¥				Searc	h for records					ړ	D
\checkmark	Full Name 个		Business Unit	Title	Position Main	Phone						T é	с <
~	Argyris Anargyros		salesnavdev										9
~	Dave Hammarstedt		salesnavdev										Charts
													

14. A dialog box will pop up as shown in the screenshot. Check "LinkedIn Configuration" and click OK.

Manage User Roles

What roles would you like to apply to the 1 User you have selected?

Role Name	Business Unit	
CEO-Business Manager	linkedintest	
CSR Manager	linkedintest	~
Customer Service Representative	linkedintest	
Delegate	linkedintest	
☑ LinkedIn Configuration	linkedintest	
Marketing Manager	linkedintest	~



х

15. Now, only users given the Microsoft Dynamics CRM 👻 🏫 🗌 SALES 🤘 SAVE
 SAVE & CLOSE + NEW
 ✓ EDIT PROCESS
 FORM "LinkedIn Configuration" OPPORTUNITY : INFORMATION * role will be able to view the prtunity "LinkedIn Integration" form. As shown in the screenshot, General the user can select the Topic* 8 Potential C "LinkedIn Integration" form when viewing the entity, and that form will become the default form for that user. User Provideo Revenue Est Revenue Probability (% Est. Close Date Rating Currency* US Dolla Line Items

Open

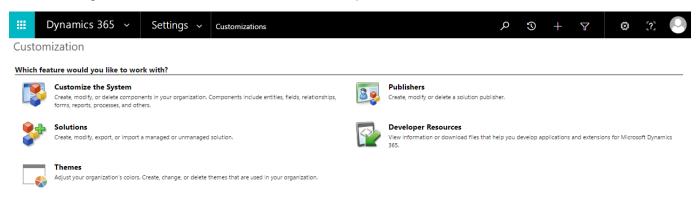
Optional - Editing Form Layouts

You have the option of modifying the layout of the LinkedIn member and/or company profiles on any of the entity forms. Doing so can be helpful if you want the LinkedIn integration on some, but not all of the entities. We also recommend moving the LinkedIn member and company profiles near the top of each entity form. If you would like to add the Company or Member profile to your own forms, please use the provided forms as an example. To modify the form layout, follow the same customization steps as you would with any other form modification:

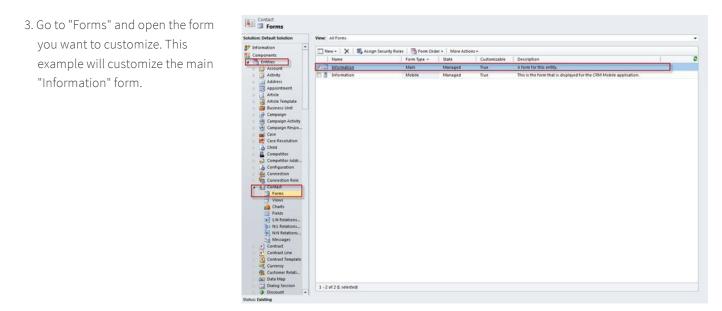
(I) Creat

Est. Close Date

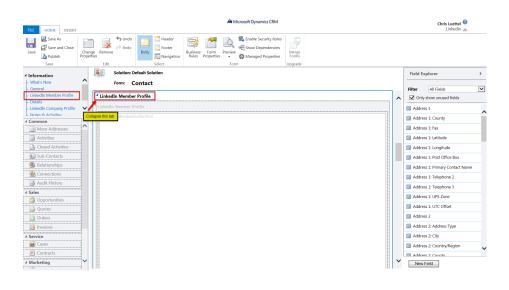
1. Go to "Settings" \rightarrow "Customizations" and click "Customize the System."



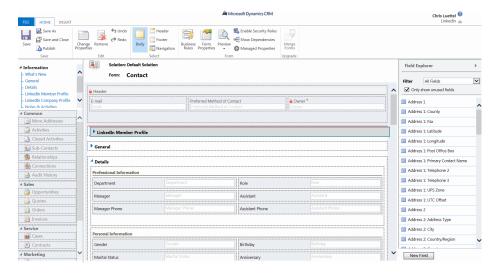
2. Go to "Entities" and select the entity you want to customize. This example will customize "Contact."



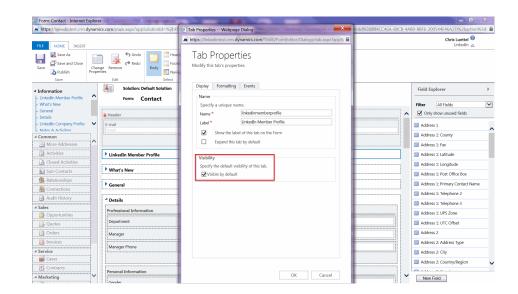
- 4. Scroll to the section you want to modify and click on it. This example will modify the "LinkedIn Member Profile." You can modify the section in the following ways:
- a. Collapse Click on the triangle next to the section name to collapse the section by default.



b. Move - Collapse the section to make moving easier. Drag the section to a new location and let go when you see a red line at the desired destination.
Remember to un-collapse the section after moving.



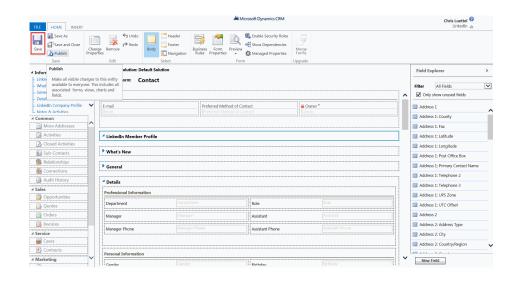
c. Hide - Double click on the section and in the dialog box, uncheck "Visible by default."



d. Remove - Click "Remove."

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4 Common									Address 1: County	^
More Addresses				Address 1: Fax						
Activities		4 LinkedIn Member Profile							Address 1: Latitude	
Closed Activities									Address 1: Longitude	
Sub-Contacts		• What's New							Address 1: Post Office Box	
Relationships	1) General							Address 1: Primary Contact Name	
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Audit History		⁴ Details							Address 1: Telephone 3	
4 Sales		Professional Information								
Opportunities									Address 1: UPS Zone	
Quotes		Department			Role				Address 1: UTC Offset	
👔 Orders		Manager			Assistant Assistant				Address 2	
🔒 Invoices		Manager Phone			Assistant Phone				Address 2: Address Type	
4 Service		Assistant Phone Possistant Phone							Address 2: City	
Cases									Address 2: Country/Region	~
Contracts		Personal Information								
▲ Marketing	~				1			~	New Field	

5. Click "Save" and "Publish" in the top left to save your changes.



6. Repeat for other entities and forms if desired.

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

