CRM Sync for Sales Navigator: Salesforce Installation Guide

This installation guide will guide you through the process of activating the Salesforce Sync for Sales Navigator, including write-back capabilities from Sales Navigator to Salesforce.

CRM Sync, including write-back, includes features available both from the desktop version of LinkedIn Sales Navigator and the Sales Navigator app (iOS and Android).

Technical Requirements:

- A Salesforce Administrator account on one of the following editions:
  - Salesforce: Enterprise, Unlimited and Developer editions
  - Salesforce: Professional *with API access enabled*
    - *Recommendation: We recommend you use an Integration User, or generic name, for installation*
- The Sales Navigator for Salesforce app, installed by a Salesforce Administrator (required for writing back activity to the CRM).
  - See our *LinkedIn Sales Navigator for Salesforce Installation Guide* to learn more
- A Sales Navigator account to authenticate to Sales Navigator as an admin
- JavaScript enabled browser
- Sales Navigator Team or Sales Navigator Enterprise edition
- An Administrator + Team Member Sales Navigator Seat (Admin Only seats are only able to configure the feature)

For further information on Technical Requirements and Details and Security, please see our *CRM Sync for Sales Navigator Technical Implementation and Security* guide.

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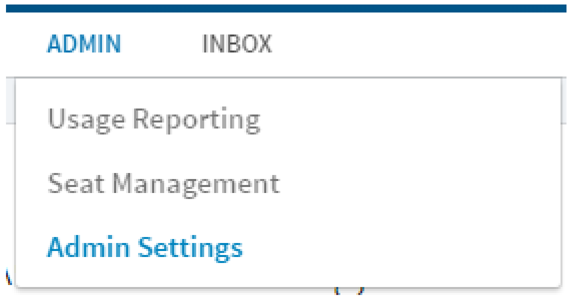
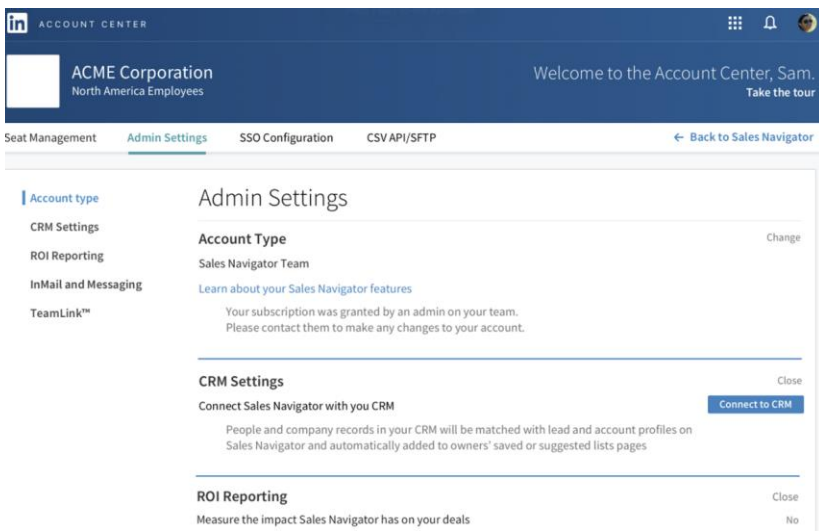
Connect Sales Navigator with Salesforce

1. Login to LinkedIn Sales Navigator
2. Select *Admin > Admin Settings*



3. Within Admin Settings, go to *CRM Settings*
4. Select *Connect to CRM*

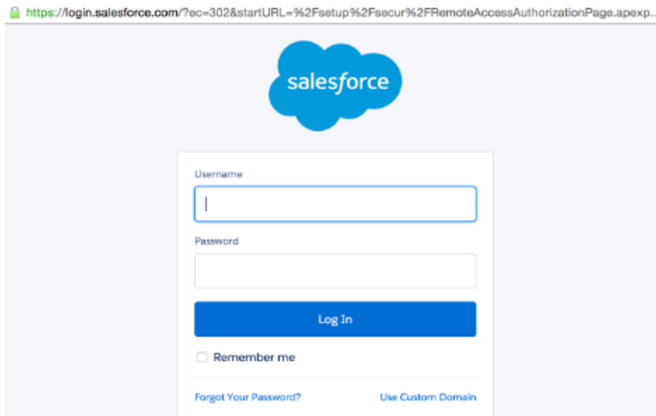


You will be required to have a Salesforce Admin authenticate access to between your organization's CRM (Salesforce) and LinkedIn Sales Navigator.

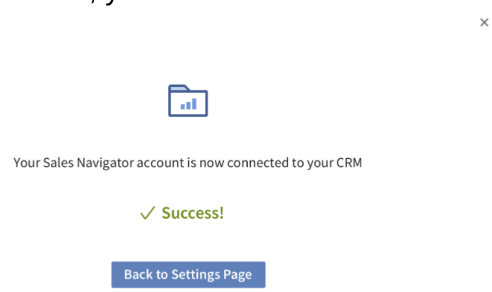
When connecting, we highly recommend you use an Integration User, or generic user name, when you login as an Admin. Once notes, tags, InMails/Messages are transferred from Sales Navigator to your CRM (Salesforce), the "Admin" name will be listed as the individual who created the note, tag, etc.. The owner (Sales Navigator seat holder) is the individual who created the action, but we do show the Admin as the creator.

If you choose not to use an Integration User, or generic user name, on initial setup, you can always un-sync and then re-sync with the Integration User as the Salesforce Admin.

5. Salesforce Admin enters Username and Password to authenticate access



6. Once your connection is successful, you will see the screen below:



You will always be able to view the last date of sync and *Disconnect your CRM Sync* from *Admin Settings > CRM Settings.*

Additionally, if you select *View details* regarding the sync, you will see the following CRM Data Sync Statistics:

CRM Data Sync Statistics - Last synced on June 27th, 2016

	Records from your CRM		
	Accounts	Contacts	Leads
Matched Your CRM records are matched with existing people and companies on Linkedin. A low match rate (yellow or red) may indicate data quality issues in your CRM.	69 *71% matched*	319 *94% matched*	97 *88% matched*
Added to record owners' "Saved" lists Accounts or contacts from your CRM are added to the assigned owner's "Saved Accounts" or "Saved Leads" lists, respectivley.	61	210	*n/a*
Added to record owners' "Suggested" lists Leads from your CRM are added to the assigned owner's "Suggested Leads" list in Sales Navigator.	*n/a*	*n/a*	66

For more information on CRM sync please visit the Help Center

If the sync is unsuccessful, you will see an error with details on the failure for your sync.

Errors that may be displayed and next steps:

- “Could not connect to Salesforce. Please try again later”.
  - Next step: There is a connection error with Salesforce. Please re-try later.
- “The Salesforce API reported an error. Please try again later. You can also check Salesforce’s uptime at https://trust.salesforce.com/trust/instances.
  - Next steps: Error with your API access, check with Salesforce uptime or your Salesforce representative.
- “Your Salesforce account does not have sufficient access privileges. Please check with your Salesforce administrator”.
  - Next steps: The individual attempting to enable the sync does not have required access privileges. Connect with your internal Salesforce administrator.
- “Your Salesforce org does not support the required version of the Salesforce API (v33). Please check with your Salesforce Administrator.”
  - Next steps: Review our *CRM Sync for Sales Navigator Technical Implementation and Security* guide for API requirements and connect with your Salesforce administrator
- Your Salesforce org does not support the Salesforce Bulk API. Please check with your Salesforce representative.”
  - Next steps: Review our *CRM Sync for Sales Navigator Technical Implementation and Security* guide for API requirements and connect with your Salesforce administrator
- “Could not read the required Salesforce objects from your org. Please refer to the secuirty whitepaper by your LinkedIn Customer Success Manager”
  - Next steps: Review our *CRM Sync for Sales Navigator Technical Implementation and Security* guide for API requirements and connect with your Customer Success Manager. Your organization likely is using custom Salesforce objects.

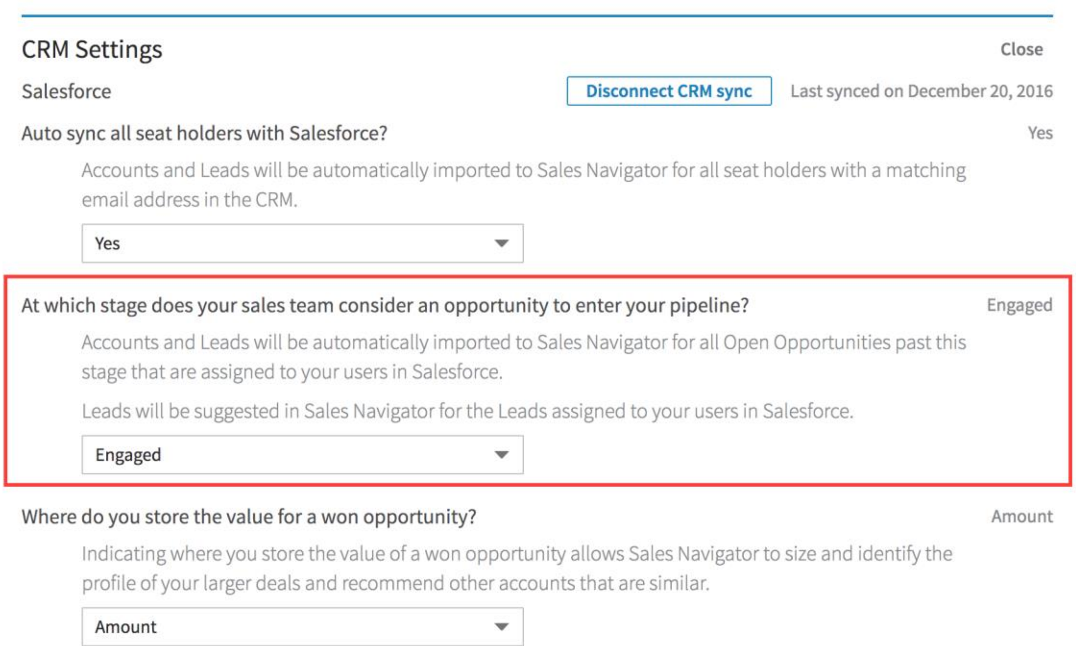
Setting your Sales Navigator CRM Settings

Once you have successfully established a sync between Salesforce and Sales Navigator, you will need to set your Sales Navigator CRM Settings for your organization.

The CRM Sync saves Sales Navigator seat holders' time by automatically importing the Accounts and Contacts associated with open Opportunities that are assigned to them in the CRM. Accounts and Contacts are automatically saved as Accounts and Leads in Sales Navigator. This enables Sales Navigator to automatically deliver updates to Sales Navigator seat holders on the most important people and companies.

Accounts and Leads are saved for all open Opportunities whose stage is greater than the stage chosen in Step 1b. This stage is set by the Admin for all Sales Navigator seat holders.

1. Under *CRM Settings*, complete the following:
    a. Auto sync all seat holders with Salesforce? (Yes or No)
        i. *Note: This is optional and we recommend keeping the defaults*
        ii. If you select "No" or you want to make any individual sync changes, please visit your *Seat Management* page to manage sync by individual seat holder
    b. At which stage does your sales team consider an opportunity to enter your pipeline? (Fields available will depend on your Salesforce settings)
    c. Where do you store the value for a won opportunity? (Fields available will depend on your Salesforce settings)

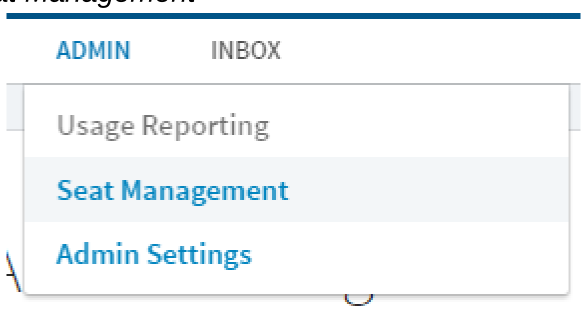


Seat management and individual sync preferences *(optional)*

Now that your sync between Salesforce and Sales Navigator has been enabled, you can manage individual's CRM sync setup for your team on the Seat Management page if you've selected *No* in the auto-sync setting for *CRM Settings*. Additionally, you will be able to assign Sales Navigator seats directly from your CRM.

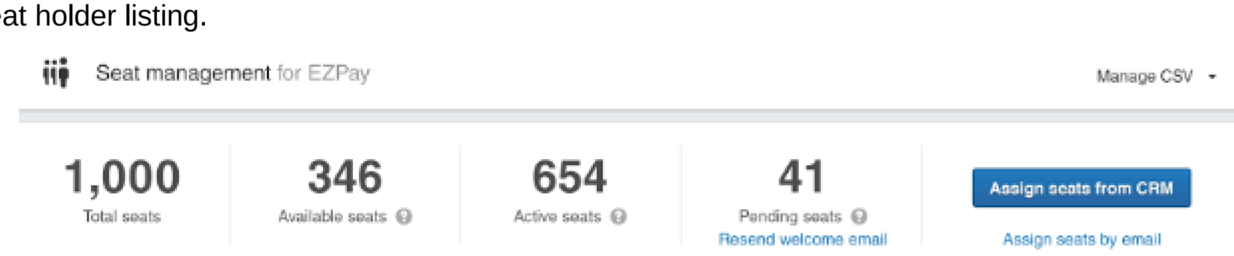
A blue Salesforce cloud confirms that the CRM sync is successfully activated for an individual on your contract.

1. Select *Admin* > *Seat Management*



2. For individuals, you will be able to *Enable CRM Sync* or *Disable CRM Sync* by selecting *More* on the far right

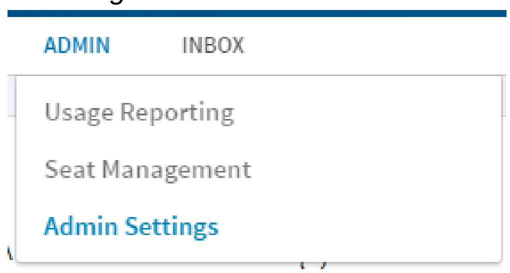
3. If you're wanting to add Sales Navigator seat holders, Select *Assign seats from CRM* to assign individuals from Salesforce, select individuals below, or use the bulk capabilities to update multiple seat holders at a time by selecting the checkbox on the top left of the individual seat holder listing.



Enabling write-back from Sales Navigator to Salesforce

Write-back will allow you to save information you create in Sales Navigator, including InMails, Messages, and Notes, directly within Salesforce.

1. Select *Admin > Admin Settings*



2. Within Admin Settings, go to *CRM Settings*

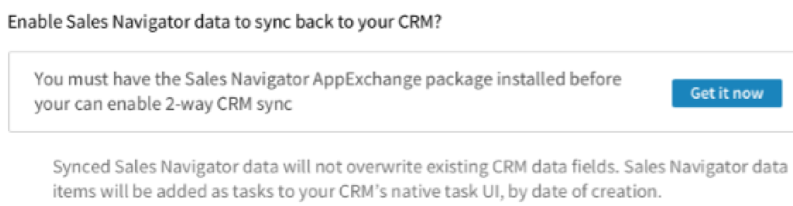
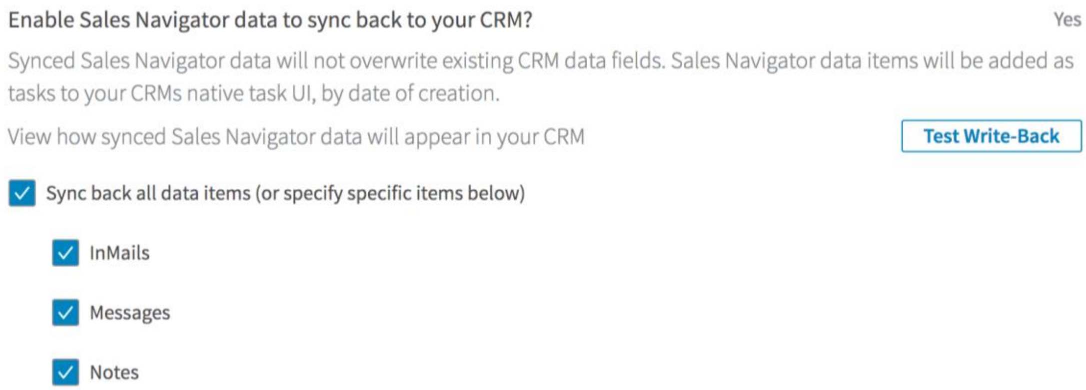


Image: PointDrive is coming soon.

3. Select *Enable Sales Navigator to sync back data to your CRM?*
   a. If you have already installed the *LinkedIn Sales Navigator for Salesforce* widget, please proceed to Step 8
   b. To enable write back, you will need to install the *LinkedIn Sales Navigator for Salesforce widget*, available in the Salesforce AppExchange (https://appexchange.salesforce.com)
   c. For details on installing the Sales Navigator for Salesforce widget, please view our *LinkedIn Sales Navigator for Salesforce* guide (available in the Sales Navigator Help Center)
4. Select *Get it now* to be re-directed to the Salesforce AppExchange
5. Complete installation of the *LinkedIn Sales Navigator for Salesforce* widget
6. Once installation has been successfully completed within Salesforce, please refresh your page in LinkedIn Sales Navigator
7. Repeat Steps 1 - 3
8. Select "Yes" to *Enable Sales Navigator to sync back data to your CRM?*

9. Test write-back by selecting *Test Write-Back*



Sales Navigator will create a sample contact with activities in Salesforce. You may view the sample record by selecting *View in CRM.*

Note: You will need to delete this record in your CRM to permanently remove it.

Recommendation: We recommend you share how information appears in this test with your Sales Navigator seat holders to assist them with building reports.

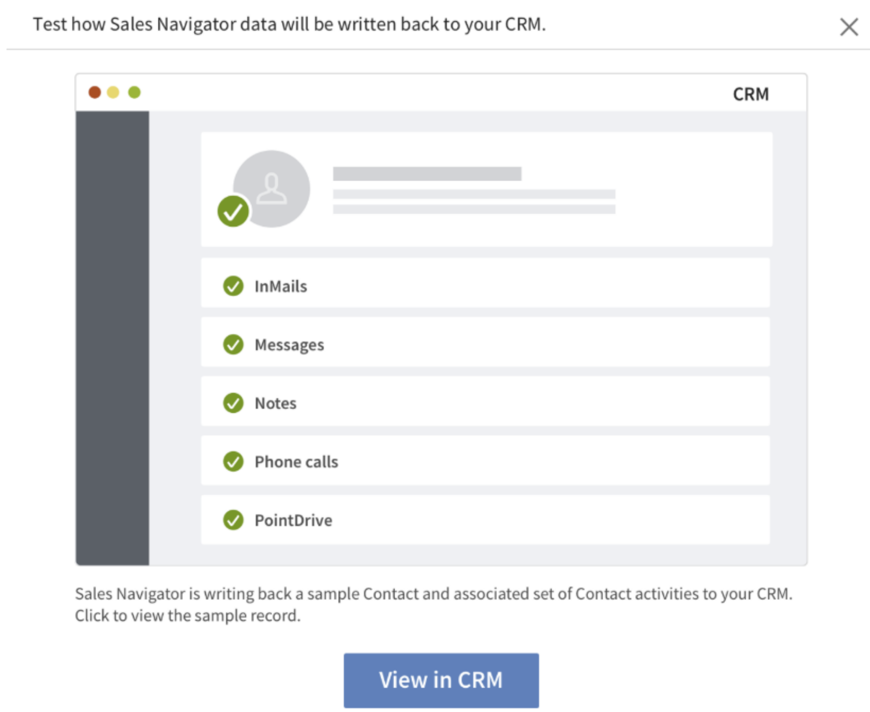


Image: PointDrive is coming soon.

10. Select whether you would like to *Sync back all data items* (recommended) or choose the specific items to write back to Salesforce

Enable Sales Navigator data to sync back to your CRM? Yes

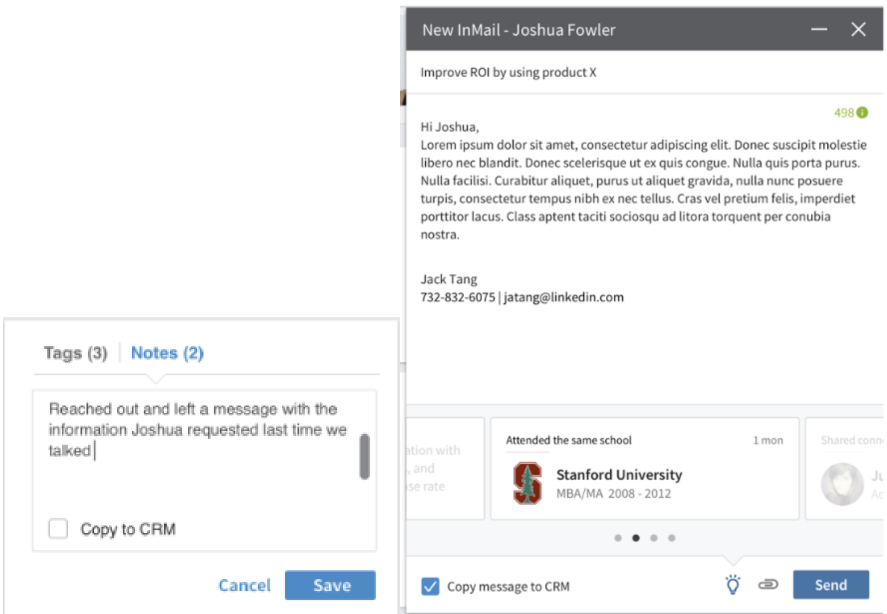
- [x] Sync back all data items (or specify specific items below)
  - [x] InMails
  - [x] Messages
  - [x] Notes

Write-back experience for Sales Navigator seat holders

Write-back will allow Sales Navigator seat holders to save information they create in Sales Navigator, including InMails, Messages, and Notes, directly within Salesforce. Seat holders will see *Copy to CRM, Copy message to CRM, Copy thread to CRM*, or similar in any area that allows them to sync information from Sales Navigator to Salesforce.

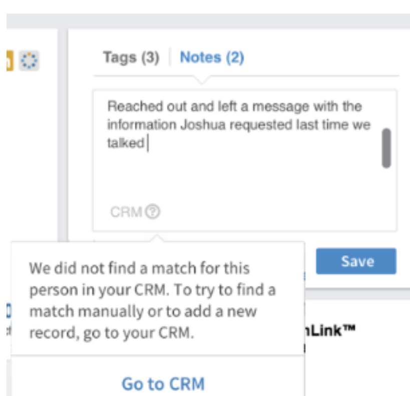
Seat holders may choose to remove individual InMails, messages, or notes from the sync by un-checking the copy.

Example: Notes and InMail CRM sync



If a match is not found between the LinkedIn member and Salesforce, Seat holders may be asked to manually create a record in your CRM to complete the sync.

For information on matching between your CRM and Sales Navigator, please visit our Sales Navigator Help Center.



Ownership and creation of information between Sales Navigator and Salesforce

All information that is sent from Sales Navigator to Salesforce will be listed as an Activity in Salesforce. The seat holder is always the owner of any information shared between Sales Navigator and Salesforce. However, the Admin who initiated the sync will be shown as the creator in all notes, tags, InMails/Messages. This is why we highly recommend using an Integration User as your Salesforce Admin.

Reporting in Salesforce with write-back

If you are creating reports in Salesforce based on write-back, please keep in mind that the Admin will be listed for all information.

Sales Navigator App and sync *(coming soon)*

Calling logs, notes, and any messages or InMails sent from the Sales Navigator App (iOS or Android) can also be synced with Salesforce as Activities.