

# CRM Widgets for Salesforce and Microsoft Dynamics CRM Technical Implementation and Security



This document describes the technical implementation and security for integrating Sales Navigator CRM Widgets with Salesforce and Microsoft Dynamics CRM.

## Technical Requirements

- A CRM org on either Salesforce or Microsoft Dynamics CRM
  - Salesforce - Professional, Enterprise, Unlimited, or Developer edition
  - Microsoft Dynamics - 365 or CRM 2016
- The Sales Navigator for Salesforce or Sales Navigator for Dynamics CRM app, installed by a CRM Administrator
- A Sales Navigator account to authenticate to the plug-in
  - Users should use their existing Sales Navigator account and not create a separate one
- A JavaScript enabled browser
- Sales Navigator Team edition or higher

## Technical Implementation for Integration with Salesforce and Microsoft Dynamics CRM

The following is a technical overview for how LinkedIn's integration works for both Salesforce and Microsoft Dynamics CRM.

- JavaScript plug-ins are embedded in the CRM object pages (lead, contact, account, and opportunity)
- To make a "match" between a CRM record and a LinkedIn profile, object parameters are passed to LinkedIn via SSL:
  - For companies: company name, industry, location, website, and ticker symbol
  - For leads: first name, last name, company name, title, location, and email
  - End user locale
- Once a CRM record has been matched to a LinkedIn member or company profile, LinkedIn stores a mapping of LinkedIn memberID and CRM RecordID
- The CRM widgets will also use the LinkedIn member profile associated with an individual user to provide that user with personalized information, such as their connection to potential leads and contacts
- No CRM credentials or record data are stored

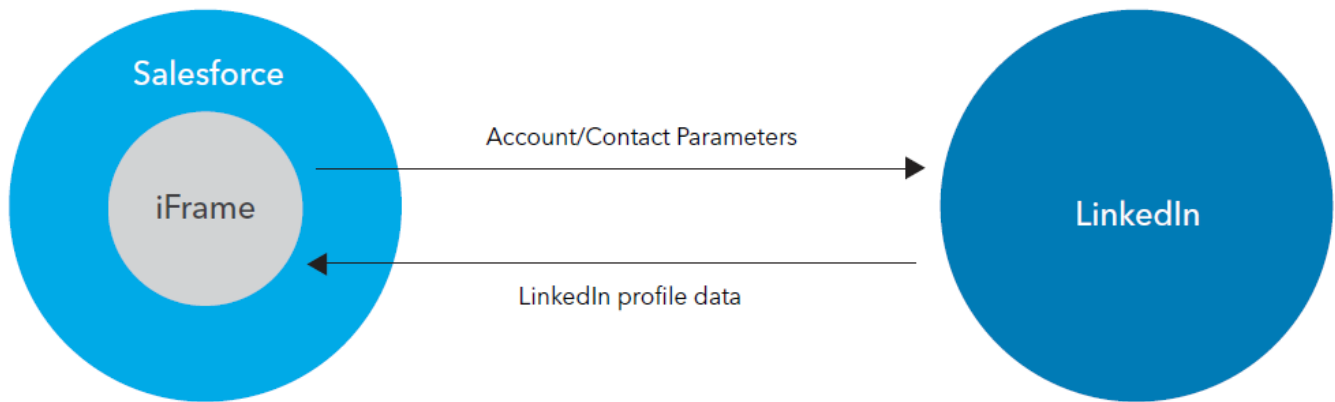
Sales Navigator CRM widgets display a variety of LinkedIn data within a user's instance of the CRM. This data is displayed for any LinkedIn member, regardless of the degree of connection. The data is not stored in the user's CRM record.

## Security and LinkedIn for Salesforce and Microsoft Dynamics CRM

We have designed the Sales Navigator CRM widget to be secure. The following is a description of the widget's security:

- Utilizes existing LinkedIn.com or SSO authentication (if configured)
- All parameters are passed securely via SSL
- No CRM credentials or record data are stored by LinkedIn, only a mapping of LinkedIn member or company ID to CRM RecordID. This allows efficient lookup of the right LinkedIn member or company on load of the CRM record page.
- Built using LinkedIn's Connect framework
  - Framework supports HTTPS, 2 Factor Authentication
  - When framework is loaded, document that loads the framework is scanned to locate LinkedIn's tags for delivering custom content
- Some details about the site are retained in loading process to help LinkedIn understand usage patterns, plan capacity, and to ensure a seamless experience

## LinkedIn Integration for Salesforce and Microsoft Dynamics CRM



## Certifications and Compliance Standards

- LinkedIn has the following industry standard certifications: PII and PCI
- LinkedIn meets the following compliance standards:
  - TRUSTe's Privacy Seal
  - U.S.-E.U. and U.S.-Swiss Safe Harbor Frameworks

To view our Privacy Policy, visit <https://www.linkedin.com/legal/privacy-policy>

For more information about our security practices, visit <https://security.linkedin.com>