



# LinkedIn Sales Navigator Deals for Salesforce Technical and Security Document



SALES NAVIGATOR

Deals is a functionality within LinkedIn Sales Navigator that provides users the ability to create a contact in CRM and manage their pipeline.

This document describes the technical and security specifications for Deals and the interaction with CRM.

## Steps for Sales Navigator Admin to enable Deals:

- Enable Deals from the [Sales Navigator Admin Page](#).
- Admin enters CRM credentials.
- Admin selects CRM opportunity fields.
- Admin selects the CRM contact fields that are required to create contacts in their organization.

## Data Mapping

- Users see **CRM Up to Date** status within Deals in Sales Navigator. This indicates real-time updates from Deals to CRM.
- Users are able to write back CRM fields based upon their personal CRM permissions, and with CRM validation rules applied from Deals in Sales Navigator, associated with their role capabilities to edit in CRM.

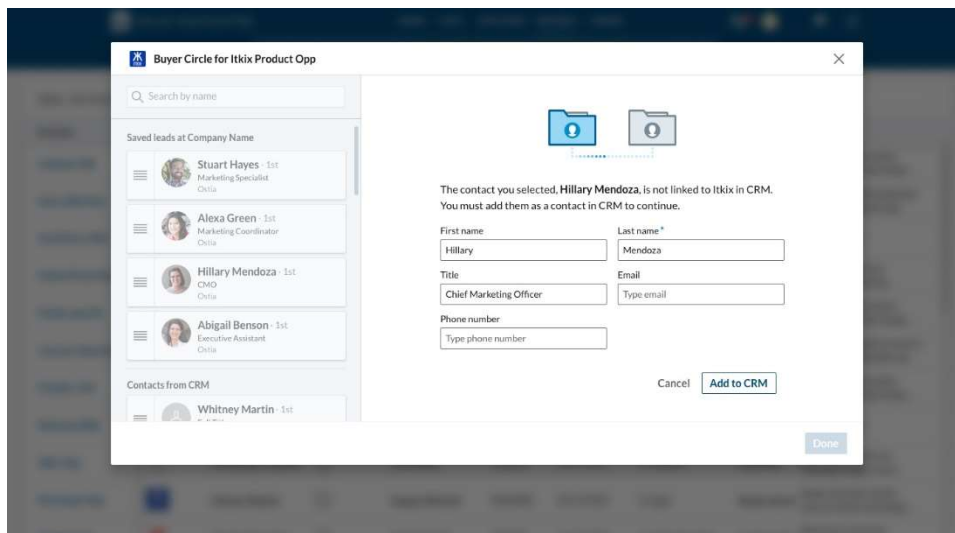
SALES NAVIGATOR | HOME | DEALS | LISTS | DISCOVER

Search for leads or accounts | Advanced | Saved Search

View: Team Open Deals | 16 Deals - \$350,000.00 | Columns | Salesforce updated 1m ago

Account	Name	Owner	Buyer circle	Amount	Close date	Stage	Forecast Category	Next steps
CodeLane	CodeLane Upsell Opp	Teresa Adams	[Avatar]	\$30,000.00	08-02-2017	2. Proposal	Pipeline	Spoke with John and he seems to think that things...
Runity	2018 Pilot for Runity	Victoria Price	[Avatar]	\$20,000.00	08-02-2017	1. Lead generation	Pipeline	Having a meeting next week to determine next steps
Fixdex	Fixdex Deal Opp	Teresa Adams	[Avatar]	\$5,000.00	08-02-2017	2. Proposal	Pipeline	Everyone seems on board but the team still has some questions
Itkix	Itkix Upsell 2018	Jeff Cortez	[Avatar]	\$15,000.00	08-02-2017	1. Lead generat...	Commit	Dave says that he thinks what he...
Flexis	Flexis Account Opp	Teresa Adams	[Avatar]	\$10,000.00	08-02-2017	1. Lead generation	Pipeline	Spoke with John and he seems to think that things...
Mintome	2018 Mintome Upsell	Victoria Price	[Avatar]	\$20,000.00	08-02-2017	2. Proposal	Commit	Having a meeting next week to determine next steps
Freshing	Freshing Opp New	Teresa Adams	[Avatar]			0. Qualification	Best Case	Everyone seems on board but the team still has some questions
Venophase	2018 Pilot	Peter Owen	[Avatar]	\$30,000.00	08-02-2017	3. Legal	Pipeline	Dave says that he thinks what he have to offer is perfect. Setting up...
Oustia	Oustia 2018 Opp	Jeff Cortez	[Avatar]	\$50,000.00	08-02-2017	2. Proposal	Commit	Spoke with John and he seems to think that things...
Zoomjax	Zoomjax Oppty.	Victoria Price	[Avatar]	\$10,000.00	08-02-2017	3. Legal	Pipeline	Having a meeting next week to determine next steps
Golden Phase	Golden Phase 2018	Teresa Adams	[Avatar]			0. Qualification	Pipeline	Everyone seems on board but the team still has some questions

- Users are also able to create new contacts with First Name, Last Name, Company and Role from LinkedIn Sales Navigator for contacts identified via Buyer Circle who are not yet on the opportunity record, plus any fields they have marked as required in Admin > manage contact fields.



## Usage of Objects and Fields

In contrast to CRM Sync, which stipulates a strict list of exactly which fields from your CRM are subject to sync, Deals has no single list of CRM fields that can be used. This flexibility is afforded by the fact that all Deals activity is executed on behalf of each individual Sales Navigator user's **own Salesforce user**, eliminating concern of data being inappropriately shared amongst Sales Navigator users.

There is a **default** set of CRM fields and objects that will be exposed, and this list can be selectively narrowed or extended (even into custom fields) by the Admin.

Following is a table of the fields that are exposed out of the box, and how they are used.

### Objects and Fields used from CRM, by Default (Salesforce)

SObjects	Fields & Child Relationships	Usage
Account	Name OwnerId Industry Description NumberOfEmployees Type Website	Display only.
Contact	Name FirstName LastName AccountId Description Email Title Phone	Display and creation. Creation occurs during the <b>Add contact to CRM</b> flow.
Opportunity	Name OwnerId AccountId Amount StageName	Editable. Opportunities are searched and presented for the Deals, and direct edits to the Deals pass back through to the Opportunity records.

	NextStep CloseDate Description Probability OpportunityLineItems	
OpportunityContactRole	OpportunityId ContactId Role IsPrimary	Are created, edited, and deleted according to "Buyer Circle" activity.
User	Name IsActive Email Title Username	Display only. Used during Sales Team onboarding and for displaying uses related to opportunities.

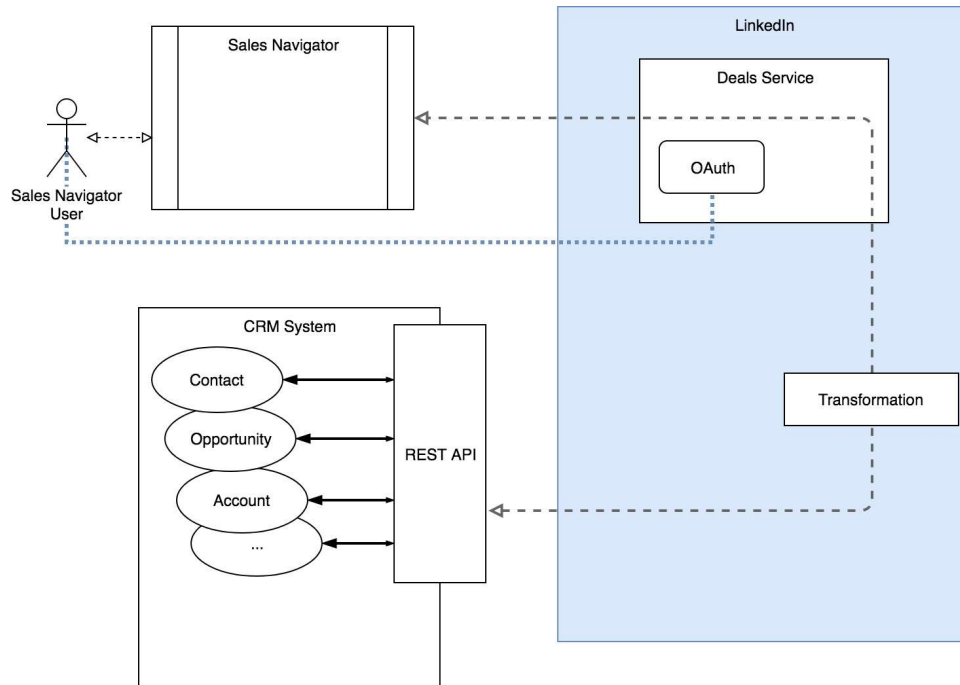
**Objects and Fields used from CRM, by Default (Dynamics)**

<b>Entities</b>	<b>Properties &amp; Navigation Properties</b>	<b>Usage</b>
account	fullname ownerid industrycode description numberofemployees customertypecode websiteurl	Display only.

contact	fullname firstname lastname parentaccountid description emailaddress1 jobtitle telephone1	Display and creation. Creation occurs during the "Add contact to CRM" flow.
opportunity	name ownerid parentaccountid estimatedamount actualamount salesstage estimatedcloseddate description closeprobability connection	Editable. Opportunities are searched and presented for the Deals, and direct edits to the Deals pass back through to the Opportunity records.
user	fullname firstname middlename lastname isdisabled internalemailaddress jobtitle	Display only. Used during Sales Team onboarding and for displaying uses related to opportunities.

## Data Flow Diagram

This diagram depicts the Deals data flow, and also is a re-publishing of the CRM Sync data flow so that they are more comparable to one another.



## Frequently Asked Questions

### What API calls are made against my CRM?

Because Deals acts on behalf of each individual CRM user, it cannot do anything that that user would not be able to do directly within her CRM product. With that in mind, CRM activity executed by Deals is loosely limited to the following varieties:

### Salesforce

Type of API Call	Is Used For:
Get Picklist Values	<ul style="list-style-type: none"> <li>Retrieving metadata</li> </ul>
Describe SOBJect	<ul style="list-style-type: none"> <li>Retrieving metadata</li> </ul>
SOBJect-level CRUD	<ul style="list-style-type: none"> <li>Editing Opportunities</li> </ul>

	<ul style="list-style-type: none"> <li>Managing Opportunity Contact Roles</li> <li>Creating Contacts</li> </ul>
SOQL queries	<ul style="list-style-type: none"> <li>Displaying Deals</li> <li>Searching Contacts by name (Buyer Circle)</li> <li>Searching Users while specifying Team Members during onboarding</li> </ul>

## Dynamics

Entity Types	Is Used For:
Queries on EntityDefinitions (with AttributeDefinitions) where LogicalName is one of "opportunity", "account", "system_user", "contact"	<ul style="list-style-type: none"> <li>Retrieving metadata</li> </ul>
Queries on connectionroles	<ul style="list-style-type: none"> <li>Retrieving buyer circle metadata</li> </ul>
Queries and updates on opportunities, connections, contacts, accounts, system_users	<p>All record-level activity:</p> <ul style="list-style-type: none"> <li>Displaying Deals</li> <li>Searching Contacts by name (Buyer Circle)</li> <li>Searching Users while specifying Team Members during onboarding</li> <li>Editing Opportunities</li> <li>Managing Opportunity Contact Roles</li> <li>Creating Contacts</li> </ul>

## What does the Sales Navigator admin see? Can the Sales Navigator Admin choose which fields to display on Deals?

Deals will expose the objects/fields the SN Admin chooses to expose.

The variety of fields which Deals reads/writes is totally determined by the SN admin.

- Deals can write to all fields of the Opportunity (we happen to disallow updating of Opportunity name, but this is a UX concern, not a legal one and is subject to change.)
- We also create Contacts on behalf of the user. The variety of objects we allow for creation will probably constantly be expanding.

## **What permissions or settings does the CRM end-user need to have to make changes or write-back from Deals?**

End users must be allowed to authenticate via OAuth and make all API calls listed in the above section, titled "What API Calls are made against my CRM System?"

## **What kind of CRM data gets stored with LinkedIn as a result of Deals usage?**

Deals does not store any CRM data; it is only queried directly for display and manipulation by the user. Additional storage cases:

- CRM metadata is cached with a max TTL of 30 days for performance reasons.
- Small amounts of data mentioning field names may be saved with LinkedIn result from the creation of DealsViews and of the Admin setting of which fields to expose.

## **Am I able to permanently delete any data sent from my CRM to Deals?**

- Cached metadata expires within 30 days.
- Views (which mention field names) may be deleted manually, or will be automatically purged if Sales Navigator Seats are permanently removed.

## **How does LinkedIn authenticate to my CRM instance? How is that communication secured?**

Deals runs on behalf of each individual CRM user; anybody who decides to use Deals must step through their own OAuth process (even if CRM Sync is enabled and connected). As such:

- Users are can't do anything through Deals that they wouldn't do within their CRM system; because
- User activity is naturally subject to whatever level of auditing comes with the CRM system, such that even if changes were made to a CRM record via Deals, the CRM has knowledge of who made that change

## **Did LinkedIn perform any penetration testing?**

Yes, we have completed internal penetration testing of the CRM Sync feature and as of date, we are not aware of any issues that would compromise the confidentiality and integrity of the CRM data stored on LinkedIn's platform.



## **Has the CRM Sync been certified on Microsoft AppSource?**

Yes. LinkedIn is a certified Microsoft Dynamics partner and goes through a standard security review process for our integration. The CRM Sync is not distributed through the Microsoft AppSource, but directly uses Dynamic's API to access and write client's' CRM data.

## **Certifications and Compliance Standards**

- LinkedIn has the following industry standard certifications: PII and PCI
- LinkedIn maintains ISO 27001 & ISO 27018 Certifications, as well as a SSAE-18 certification, SOC 2 Type I report.
- 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>

Learn more with the [Learning Center Deals Tip Sheet](#).