LinkedIn Sales Navigator Deals for Salesforce Technical and Security Document

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

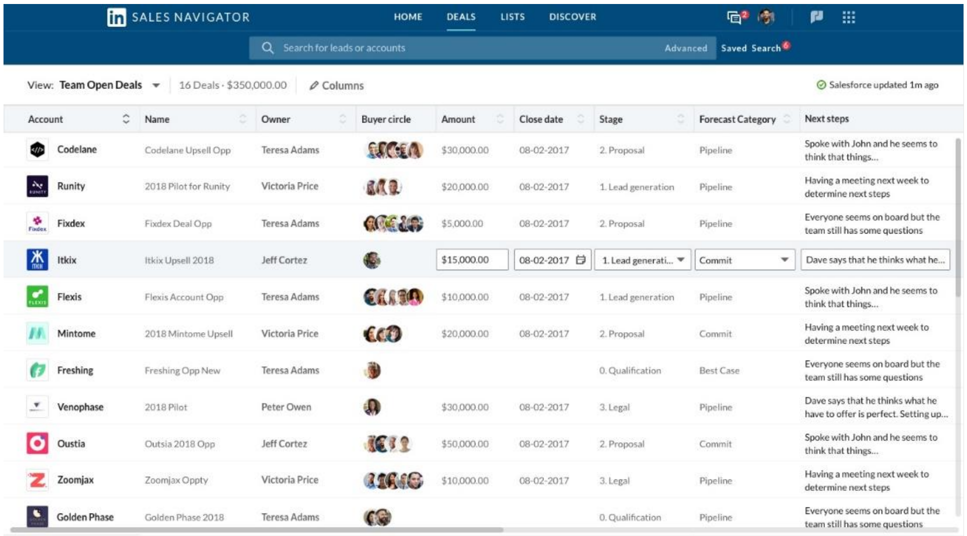
This document describes the technical and security specifications for Deals and the interaction with CRM.

Steps for Sales Navigator Admin to enable Deals:

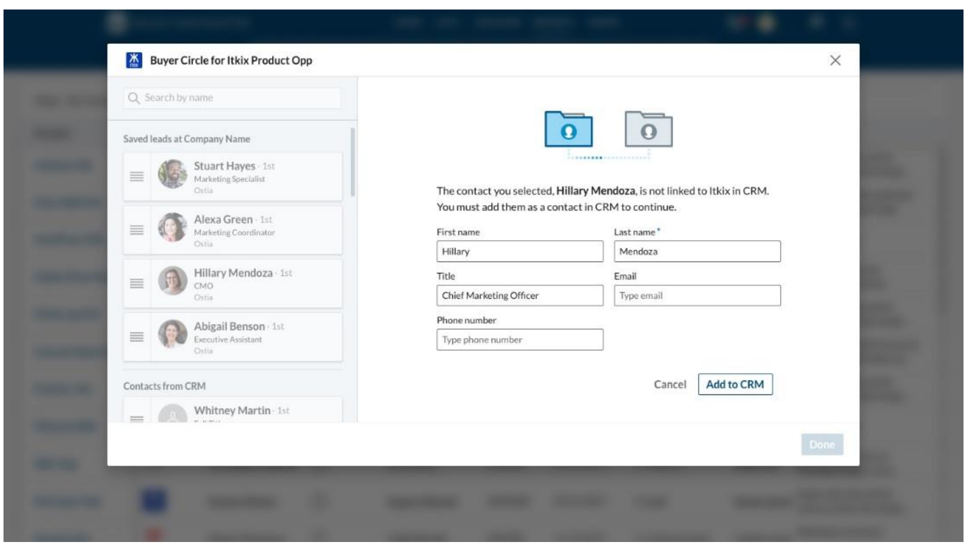
- Enable Deals from the Sales Navigator Admin Page.
- Admin enters CRM credentials.
- Admin selects CRM opportunity fields.
- Admin selects the CRM contact fields that are required to create contacts in their organization.

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.



- 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 **Add contact to CRM** 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.

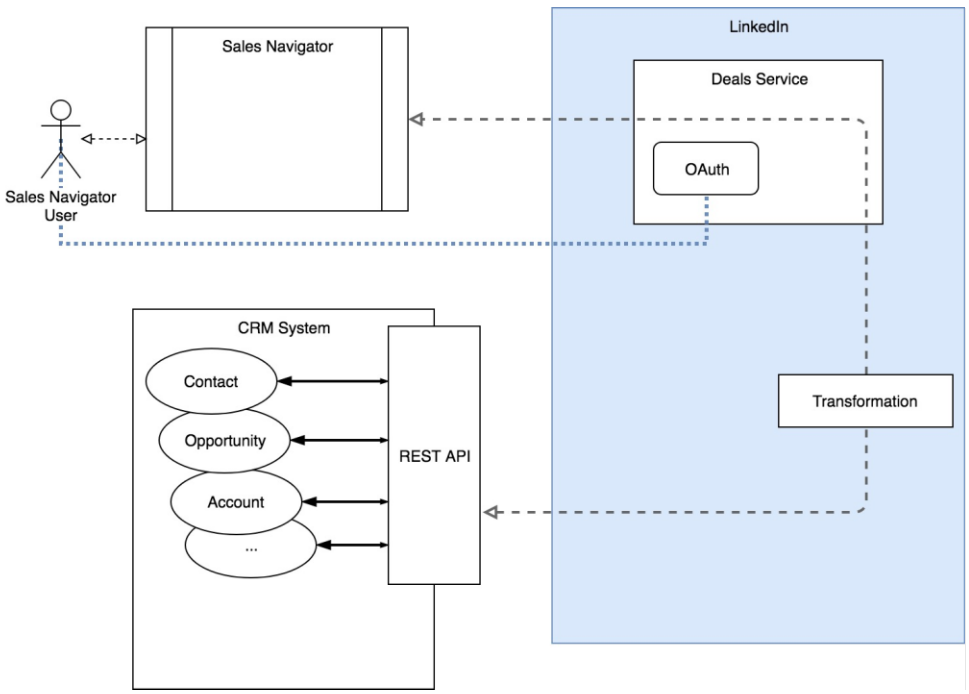
Objects and Fields used from CRM, by Default (Dynamics)

Entities	**Properties & Navigation Properties**	**Usage**
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.

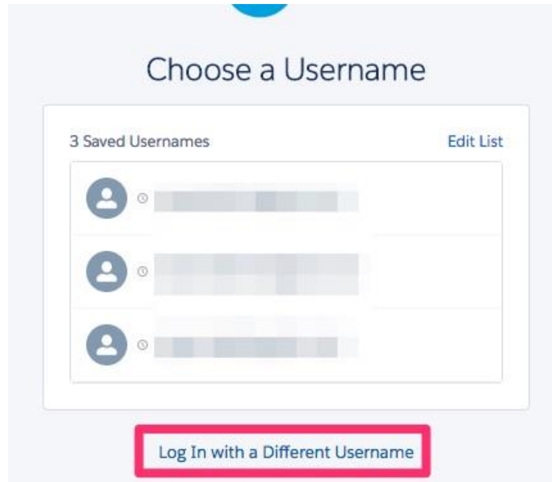


Connecting Deals to a Sandbox

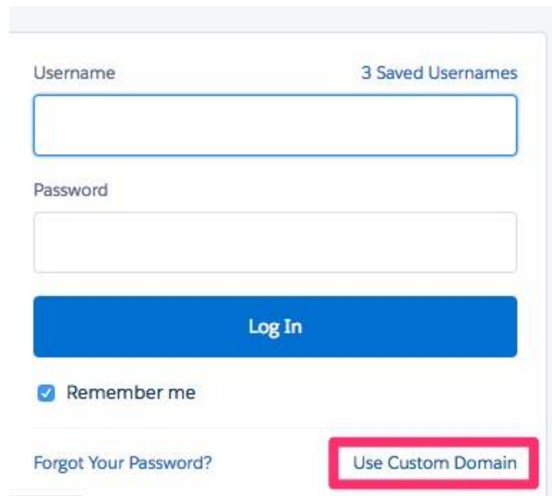
To connect Deals to a sandbox account for testing prior to launch:

1. Connect CRM Sync by logging in and following the steps there.
   - **Note**: The CRM Sync needs to be connected to a production Salesforce instance.
2. In another tab in the same browser window, log out of Salesforce.
   - **Note**: Doing this will make the next steps easier.
3. Scroll to the bottom of the page and turn **Deals** on.
4. On the **Connect to CRM** step in the **Deals** section, click **Connect**.

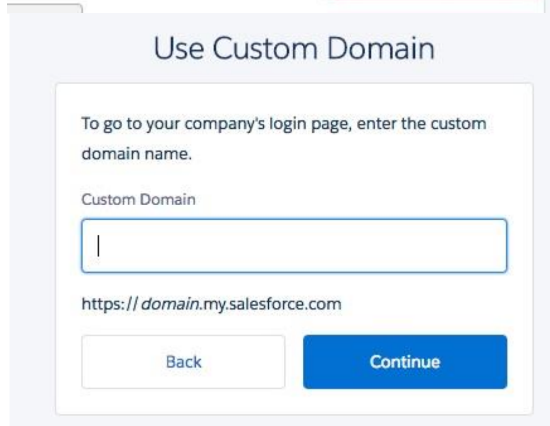
5. On the next page, select **Log In with a Different Username**.



6. On the next page, select **Use Custom Domain.**



7. On the next page, enter your sandbox domain in **Custom Domain** and click **Continue**.



Deals is now connected to your sandbox. You can now manage opportunity fields, and select or create contact fields against your test environment to make sure everything is working as expected.

When done, just disconnect from CRM on this page. You can then log in to your main Salesforce account and make the changes on production to mirror what you tested against the sandbox.

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	• Retrieving metadata
Describe SObject	• Retrieving metadata
SObject-level CRUD	• Editing Opportunities • Managing Opportunity Contact Roles • Creating Contacts
SOQL queries	• Displaying Deals • Searching Contacts by name (Buyer Circle) • Searching Users while specifying Team Members during onboarding

Dynamics

Entity Types	Is Used For:
Queries on EntityDefinitions (with AttributeDefinitions) where LogicalName is one of “opportunity”, “account”, “system_user”, “contact”	• Retrieving metadata
Queries on connectionroles	• Retrieving buyer circle metadata
Queries and updates on opportunities, connections, contacts, accounts, system_users	All record-level activity: • Displaying Deals • Searching Contacts by name (Buyer Circle) • Searching Users while specifying Team Members during onboarding • Editing Opportunities

	• Managing Opportunity Contact Roles • Creating Contacts

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**.