CRM Sync for Sales Navigator: Salesforce Enablement Guide

The enablement of CRM Sync and write-back will take less than 10 minutes

This guide will walk you through the process of activating the CRM Sync, including write-back, between Sales Navigator and Salesforce. (**Note**: **ALL CRM Sync features, including write-back are NOT supported with Person Account types**)

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

CRM Sync for Sales Navigator

- Automatically imports Accounts, Leads, and Contacts into Sales Navigator associated with open Opportunities in your CRM. (**Note:** Person Accounts **NOT** supported)
- Saves information you create in Sales Navigator directly in your CRM, including InMails, Messages, and Notes, with optional write-back. (**Note**: Person Accounts **NOT** supported)

Technical Requirements

- A Salesforce Administrator account on one of the following editions:
    - Salesforce: Enterprise, Performance, Unlimited, and Developer editions
    - Salesforce: Professional Edition **requires API Access Enabled** (***An additional purchase may be required. Contact Salesforce for more details***.)
    - **Recommendation**: Wπe highly recommend you use an Integration User, or generic name, for installation
- Completed installation of 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* here to learn more
- JavaScript enabled browser.
- Sales Navigator Team or Sales Navigator Enterprise edition.
- **A Sales Navigator Administrator + Team Member Seat (Admin Only seats can configure the feature, but will not be able to verify full functionality.)**

For further information on technical requirements, security, and additional details associated with the CRM sync, please see our *CRM Sync for Sales Navigator Technical Implementation and Security* guide here.

Testing CRM Sync on a Developer edition before you install on a Production instance:

If you would like to test the CRM sync before you complete the installation on your Salesforce Production environment, we recommend you connect the Production version of the LinkedIn Sales Navigator (SN) app with a Developer edition of your organization's CRM.

Testing steps: Complete the installation of the SN Production app on your Dev instance (*Sales navigator app for Salesforce – Installation Guide*, found here: https://www.linkedin.com/help/sales-navigator/answer/82207) and then follow this guide for enablement of the CRM Sync for testing.

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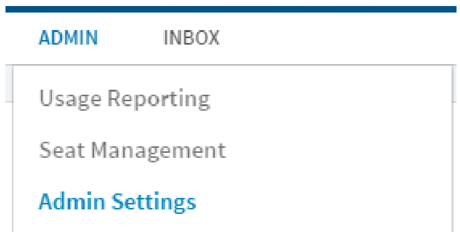
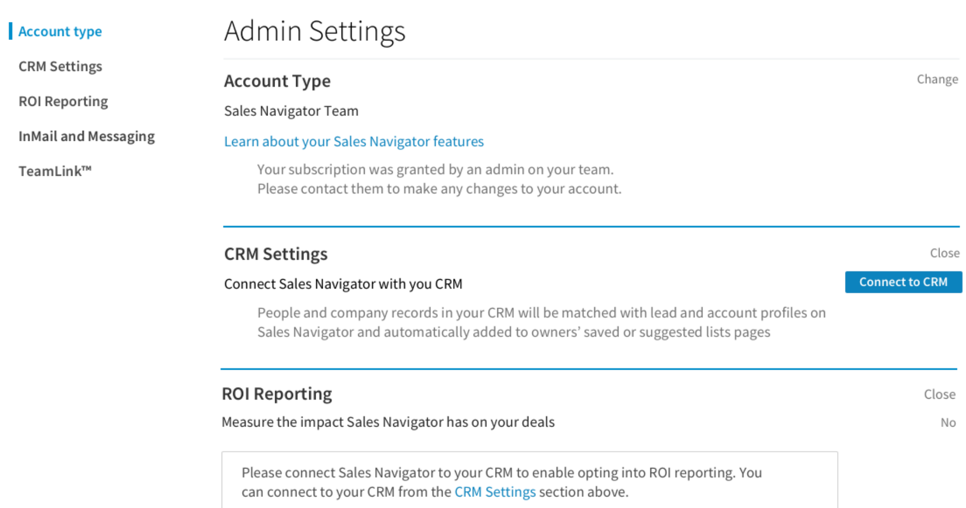
Connect Sales Navigator with your CRM

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



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

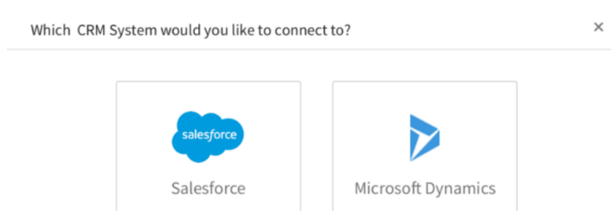


You will be required to have a Salesforce Admin authenticate access between your organization's CRM (Salesforce) and LinkedIn Sales Navigator.

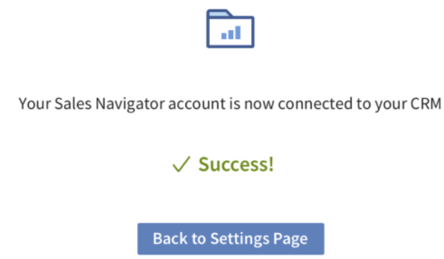
When connecting, we highly recommend you use an Integration User, or generic user name, when you login as an Admin. Once notes, tags, InMails/Messages are transferred from Sales Navigator to your CRM (Salesforce), the “Admin” name will be listed as the individual who created the note, tag, etc.. The 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. Select your CRM to authenticate access.



6. Input required authentication credentials.
7. Once your connection is successful, you will see the screen below. Select **Back to Settings Page**.



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

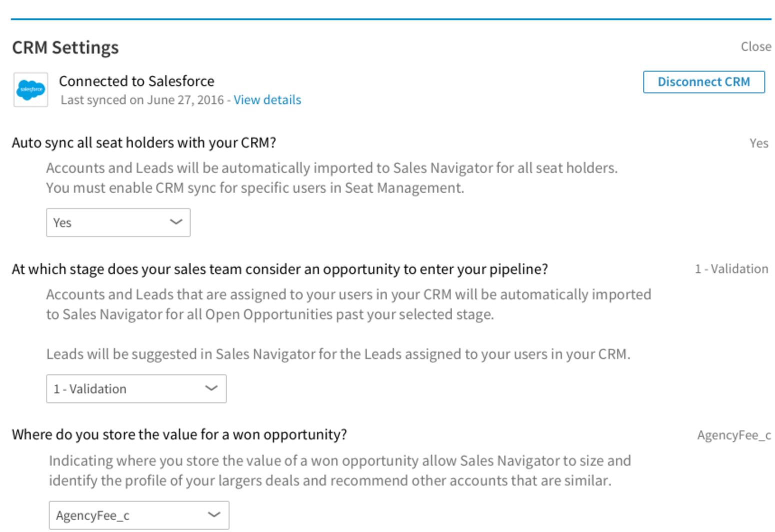
Errors that may be displayed and next steps:

- **Could not connect to CRM. Please try again later**.
  - Next step: There is a connection error with CRM. Please re-try later.
- **The CRM API reported an error. Please try again later**.
  - Next steps: Error with your API access, check with CRM system's uptime or your CRM representative.
- **Your CRM account does not have sufficient access privileges. Please check with your CRM administrator.**
  - Next steps: The individual attempting to enable the sync does not have required access privileges. Connect with your internal CRM administrator.
- **Could not read the required CRM objects from your org. Please refer to the security 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.
- **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.

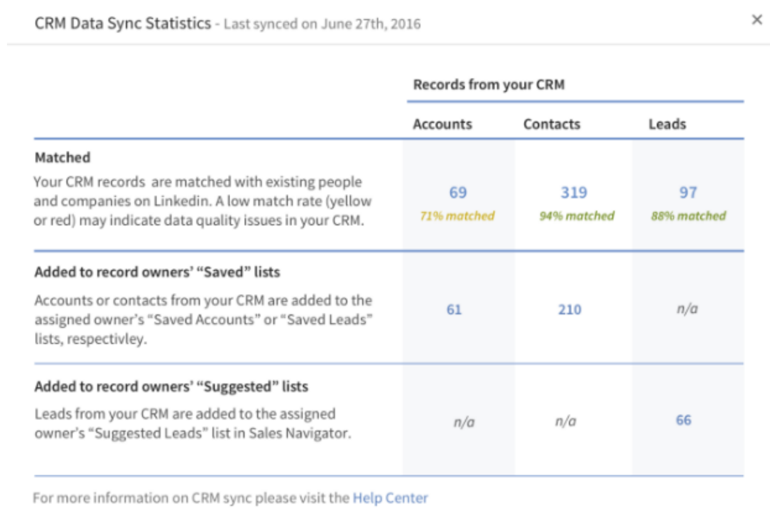
Sync status and disconnecting your sync.

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

You may purge all imported CRM data at any time by selecting **Disconnect CRM Sync** and **Yes, clean up all previously imported CRM data**.



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



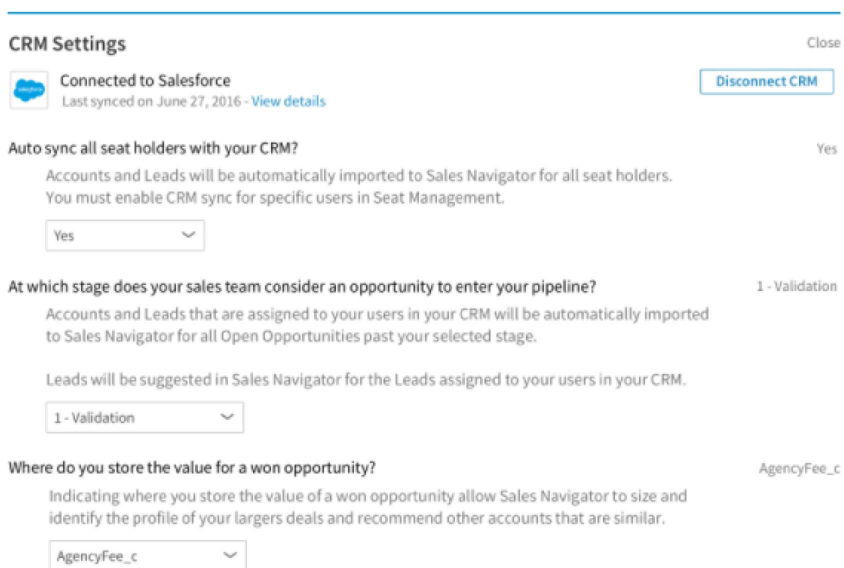
Setting your Sales Navigator CRM Settings

Once you have successfully established a sync between your CRM 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 CRM settings.)
   c. Where do you store the value for a won opportunity? (Fields available will depend on your CRM settings.)



Congratulations!

You have enabled the sync from your CRM to Sales Navigator. We highly recommend you enable write-back from Sales Navigator to your CRM by following the steps in the next section.

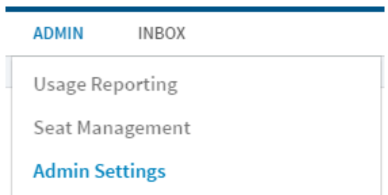
If you have additional questions or require assistance, you can reach LinkedIn Sales Solutions support at https://www.linkedin.com/help/sales-navigator/ask

Enabling write-back and testing the sync from Sales Navigator to your CRM

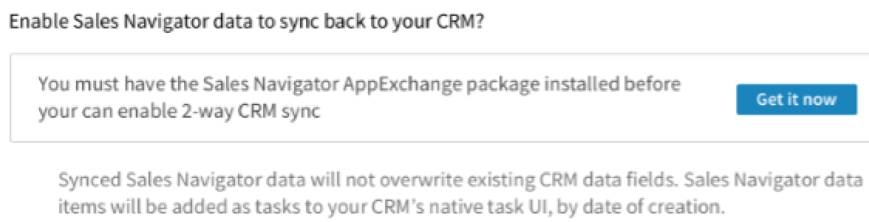
(highly recommended, but optional)

Write-back will allow you to save information you create in Sales Navigator, both from the desktop and mobile app, including InMails, Messages, and Notes, directly within your CRM. This will complete the two-way sync between Sales Navigator and CRM.

1. Select **Admin** > **Admin Settings.**

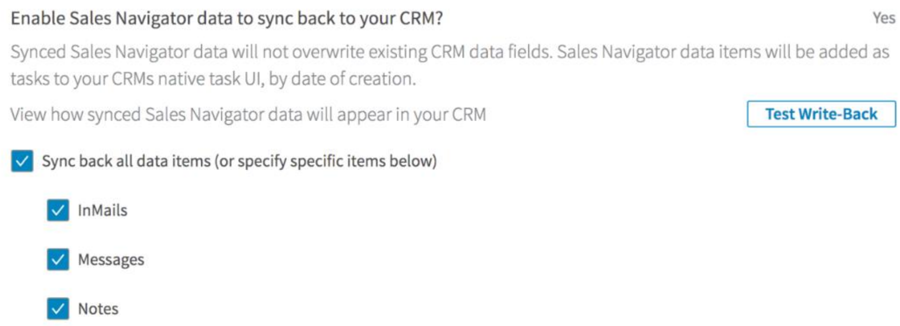


2. Within Admin Settings, go to **CRM Settings.**



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

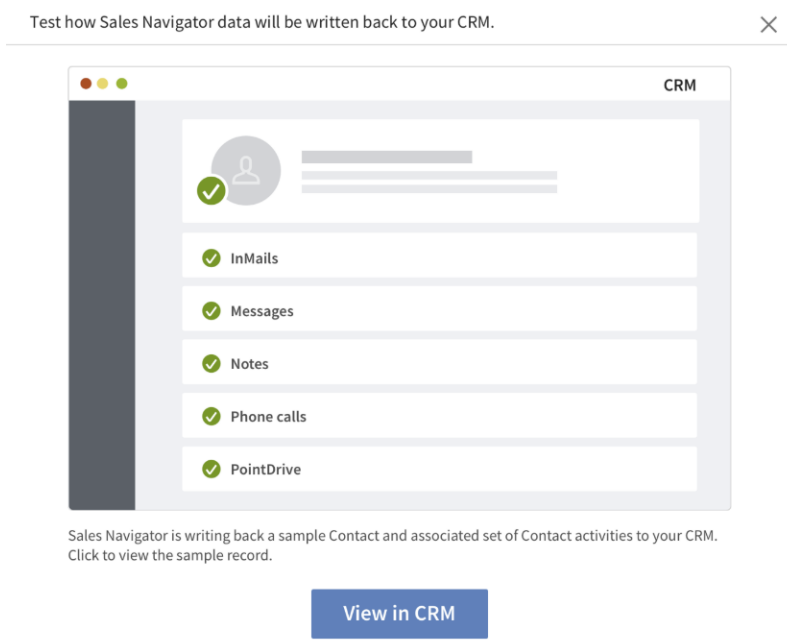
8. Select **Yes** to **Enable Sales Navigator to sync back data to your CRM?**
9. Test write-back by selecting **Test Write-Back.**



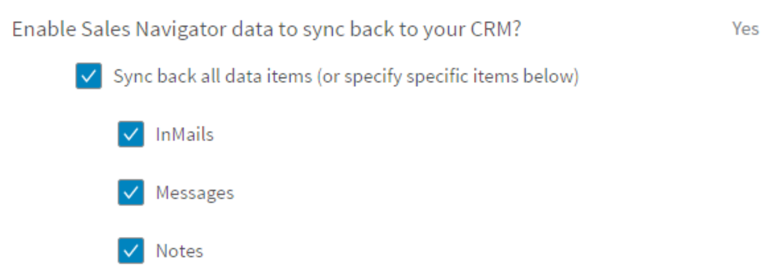
Sales Navigator will create a sample contact with activities in your CRM. You may view the sample record by selecting **View in CRM**.

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.



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



Notes:

- CRM writeback supports LinkedIn members with, and without matched CRM records. If writeback occurs and a record exists, the activity will be written as a closed activity. If a record does not exist, the activity will be written as an open activity.
- If activity on the record occurs during sync, the activity will be written as open activity.
- Writeback cannot support converted leads.

Congratulations!

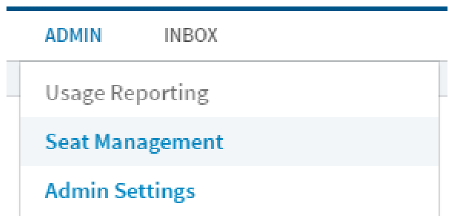
You have enabled the write-back from Sales Navigator to your CRM!

Seat management and individual sync preferences *(optional)*

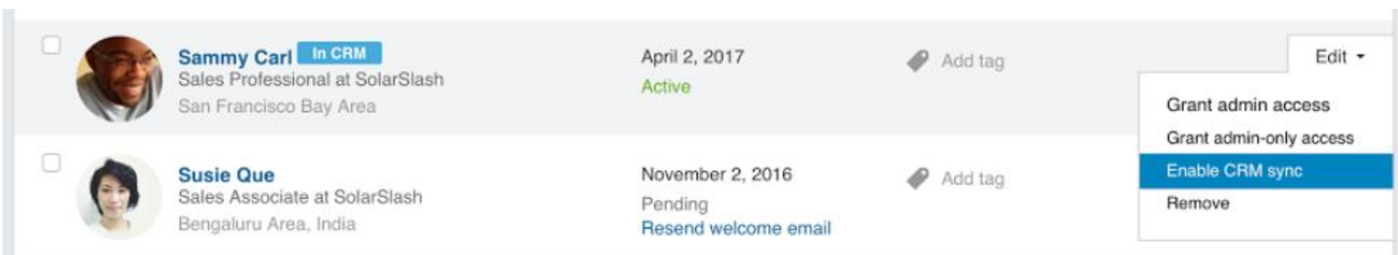
Now that your sync between your CRM and Sales Navigator has been enabled, you can manage individual CRM sync setup for your team on the Seat Management page if you've selected *No* in the auto-sync setting for *CRM Settings*. Additionally, you are now able to bulk assign Sales Navigator seats directly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

In CRM badge confirms that the CRM sync is successfully activated for an individual on your contract.

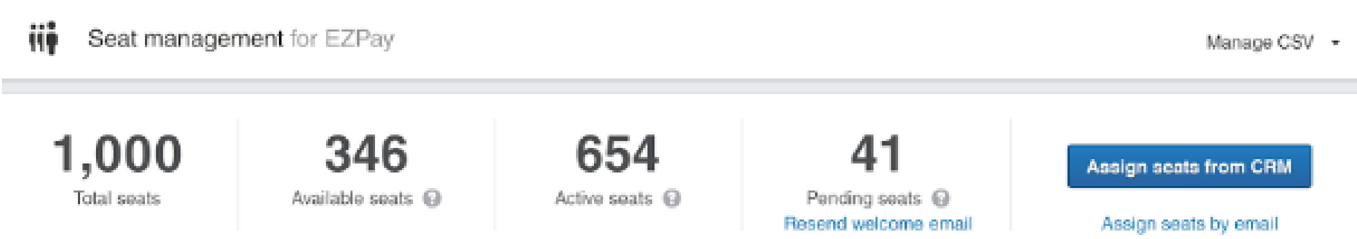
1. Select **Admin** > **Seat Management.**



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



Add new Sales Navigator seat holders directly from your CRM. If you're wanting to add Sales Navigator seat holders using your CRM, Select **Assign seats from CRM** to assign individuals from your CRM. You may select individuals 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. More details on assigning seats from your CRM can be found here.



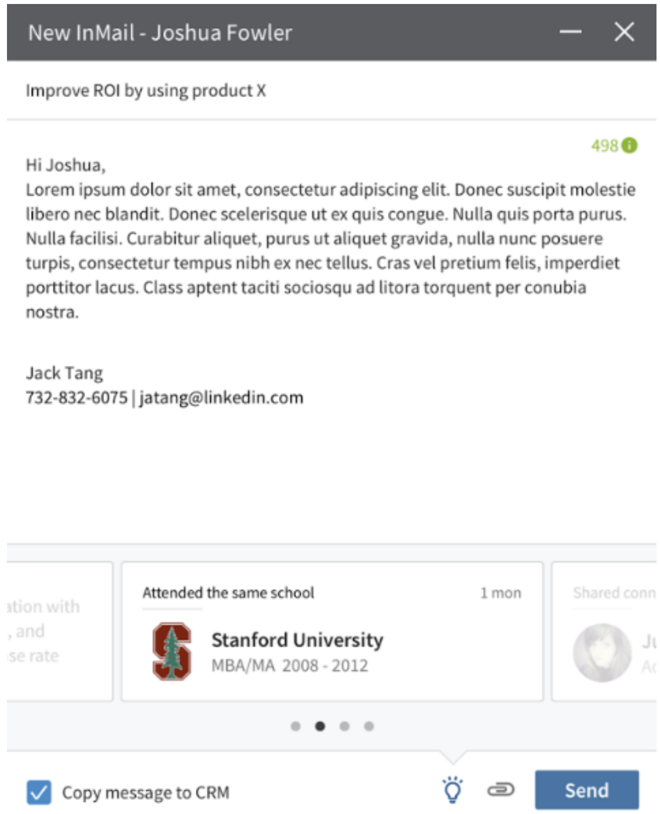
User experience: write-back experience for Sales Navigator seat holders

Write-back will allow Sales Navigator seat holders to save information they create in Sales Navigator, including InMails, Messages, and Notes, directly within your CRM. 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 your CRM.

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

Image: InMail CRM sync including “Copy message to CRM”



Location of Sales Navigator information in your CRM. InMail, Messages, and Notes will appear within Activity History on the matched contact record within your CRM. If a person or company is not matched between Sales Navigator and your CRM, you will be able to find the Unassigned InMail or Message Task within the LinkedIn unresolved task report.

People and company matching issues between Sales Navigator and your CRM. If a match is not found between the LinkedIn member and your CRM, 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 here.

Frequently Asked Questions

How does the ownership and creation of information between Sales Navigator and Salesforce operate?
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.

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

Where can I find more information on CRM Sync, including the app, and the security or technical aspects of CRM Sync and write-back?
Please visit here: https://www.linkedin.com/help/sales-navigator/answer/82207

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