

LinkedIn Sales Navigator for Salesforce Installation Guide: Classic View



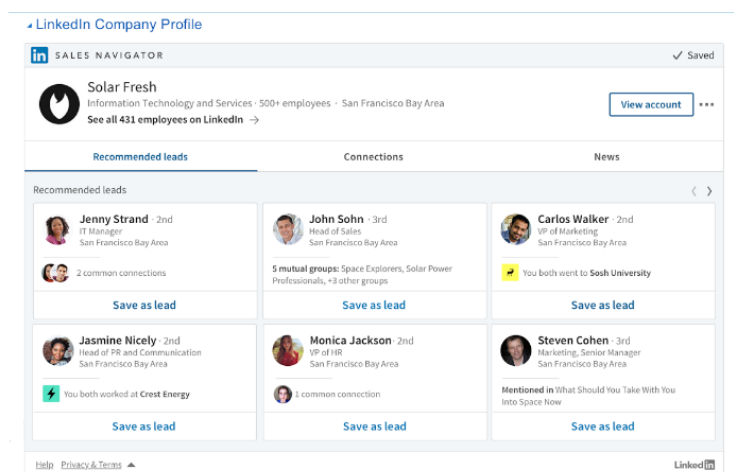
SALES NAVIGATOR

The installation process will take less than **30 minutes**.

Note: This guide is for Salesforce Classic. If you need to install Lightning, please review the guide [here](#).

The LinkedIn Sales Navigator for Salesforce Application

- Allow Sales Navigator seat holders to search for people on LinkedIn and view profile details including photos, current roles, and work history from within Salesforce
- Uncover the best way to get introduced through TeamLink
- Find new leads directly in Salesforce with Lead Recommendations
- Get Account & Lead Updates including news mentions and job changes when viewing accounts in Salesforce
- Send InMail, messages, and customized connection requests from within Salesforce



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

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Recent Updates (This includes feature changes for Sales Navigator since the last Quarter Release)

- Now available for Person Account types. Embedded profiles (Widget) will work for both Lightning and Classic versions of Salesforce.
 - **NOTE:** CRM Sync does not support Person Account types (inclusive of Write-back and Autosave Person Accounts as a contact).

KEY CALLOUTS

- **NOTE:** Installation of Sales Navigator will create new Record Types for Tasks and assign custom defaults. If you do not have "Task" **Record Types** created, **this can cause Record Types for Global Actions (e.g.**

New Event, Log a Call, New Task, etc.) to default to "--Master--" which would remove existing Global Actions from the Activities list.

- If after enablement you find that Global Actions are missing, please take the following steps:
 - To Start this process, navigate to **Setup Menu**. Next, click **Build** followed by **Customize**. From here, click on **Activities** followed by **Task Record Types**.
 - Click the **"New"** Button.
 - Next, Input the following information:
 - 1. Existing Record Type – **Master**
 - 2. Record Type Label: **Generic Task**
 - 3. Record Type Name: Generic Task
 - 4. Active: True
 - Next, enable for your **"System Administrator"** Profile and for any other profiles who will be using the **Task Record Type**.
 - Click **"Next"**
 - Apply one layout to all profiles: **"Task"**
 - Click the **"Save"** button and reattempt installation
- Now that you have created the "Generic Task" record type, follow these steps to add the "New Task" and "Log a Call" buttons back into SFDC.
 - Setup > Build > Create > Global Actions > Global Actions
 - Click "Edit" next to "Log a Call"
 - Using the drop-down next to "Record Type", choose "Task", then click "Save"
 - *For "New Task", utilize the above instructions, but click "Edit" next to "New Task"
- **NOTE:** If you previously created a custom or generic Task for Record Types, this should not have any impact on you. Please double check to ensure custom Task is set as the default post installation of Sales Navigator.

Before You Begin

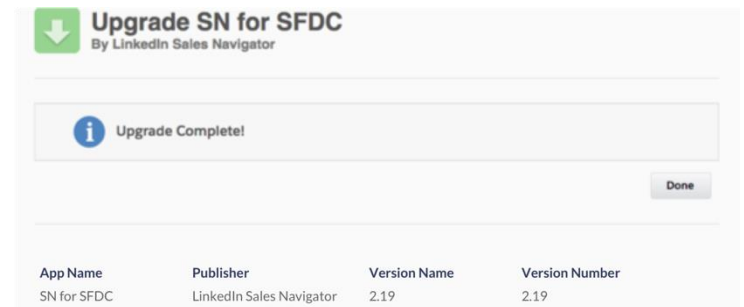
- Please note that by installing this application, you are **NOT** enabling [CRM Sync](#). To enable Sync, please complete this installation and visit the admin settings within Sales Navigator.
- The application is only compatible with Enterprise, Performance, Unlimited, Developer and Professional editions of Salesforce. (**Note:** This is **NOT** compatible with Salesforce1)
- Available for Leads, Contacts, Business Accounts, Person Accounts and Opportunities.
- You will need to be a Salesforce administrator to install the application.
- You will need a LinkedIn account. [Join now](#).
- You will need to sign your team up for LinkedIn [Sales Navigator Team](#) or [Sales Navigator Enterprise](#) edition.
- We recommend having a Sales Navigator Administrator + Team Member seat to complete the installation, however you may use a Sales Navigator Administrator seat.
- You will need to use a JavaScript enabled browser.
 - **Note:** To review the Sales Navigator for Salesforce application in the Salesforce app exchange please visit: [Sales Navigator for Salesforce](#).

If you require assistance at any point, you can reach LinkedIn Sales Solutions support at:

<https://www.linkedin.com/help/sales-navigator/ask>

Phase 1: Install the Application

1. Go to the install link for [production](#) or [sandbox](#).
2. Choose a security level. We recommend choosing, **Grant access to all users** but you may wish to limit access to certain profiles and users for whom you have already provisioned Sales Navigator Team licenses. Click **Install**.
 - **Note:** Users will need a provisioned Sales Navigator Team or Enterprise account to use the application.
3. You will see one of two screens:
 - a. An **Install Complete** screen will appear. Move on to adding the application in Phase 2.
 - b. A **Processing** screen will appear. You will be sent an email when the installation completes, at which point you can move on to Phase 2.



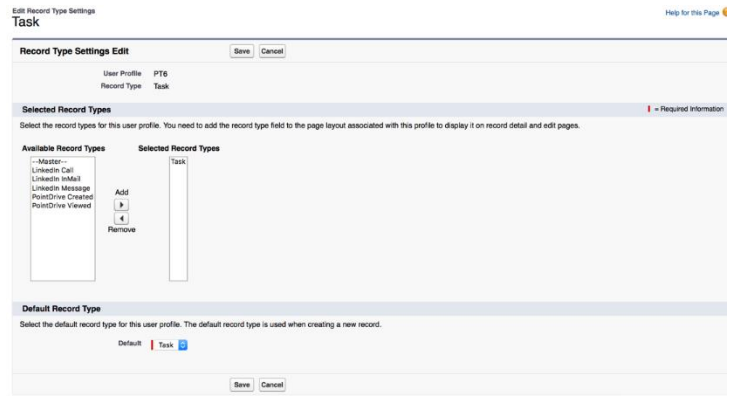
Phase 2: Application Set Up

Remove the ability for LinkedIn Tasks to be created by internal Salesforce users:

- **Note:** For Enhanced Profile User Interface, please proceed to the next section.
1. Go to **Setup**.
 2. In the **Quick Find** panel that appears on the left-hand side of your screen, type **Profiles**, and select **Profiles** located under **Manage Users**.
 3. Click into your first Profile that is NOT System Admin.
 4. Scroll to **Record Type Settings**. (Click into **Object Settings** if you have the Enhanced View)
 5. Find the Tasks section and click the **Edit** link. (**Note:** If you have the Enhanced View, select **Tasks**.)

Record Type Settings	
Accounts	Groups
Announcements	Group Records
Assets	Inbound Social Posts
Assistant Progress	Leads
Campaigns	Macros
Campaign Members	Macro Actions
Cases	Macro Instructions
Coaching	Metrics
Contacts	Metric Data Links
Content Versions	Opportunities
Contracts	Orders
Duplicate Error Logs	Performance Cycles
Duplicate Record Items	Price Books
Duplicate Record Sets	Products
Events	Promoted Search Terms
Feedback	Record Origins
Feedback Questions	Knowledge Search Activity
Feedback Question Sets	Setup Assistant Answers
Feedback Requests	Solutions
Feedback Templates	Tasks
	Task (Default), Message, PointDrive Presentation Created, PointDrive Presentation Viewed [Edit]
File Search Activity	Transaction Security Actions

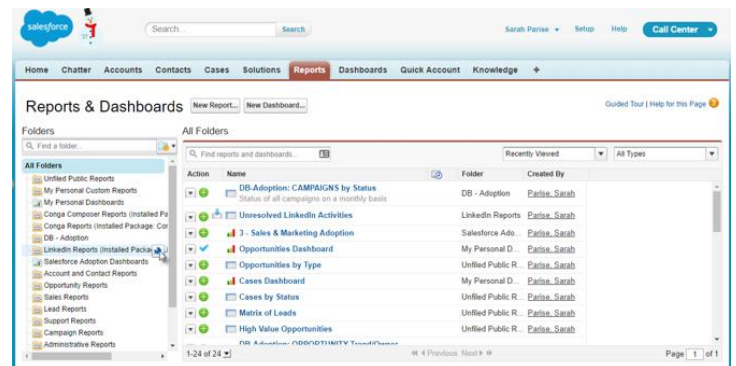
6. Remove the **Call, Message, InMail, PointDrive Created, and PointDrive Viewed** Record Types from the selected Record Types by clicking the **Remove** button. (**Note:** If you have the enhanced view, remove the checkmarks under the Record Types column for those items)
7. Click **Save**.
8. Repeat for all Profiles (**DO NOT REPEAT FOR THE SYSTEM ADMIN PROFILE.**)
9. Proceed to **Give users access to the LinkedIn Activities Report** Folder section.



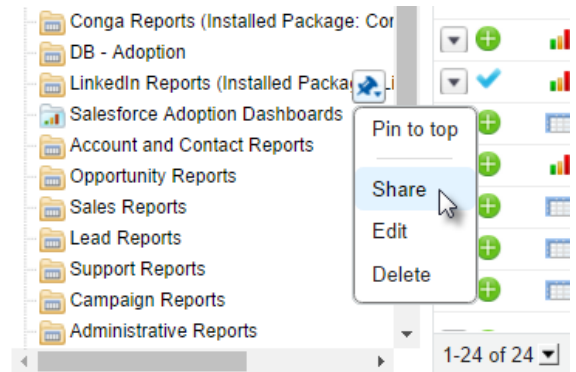
If you require assistance at any point, you can reach LinkedIn Sales Solutions support at: <https://www.linkedin.com/help/sales-navigator/ask>

Give users access to the LinkedIn Activities Report Folder

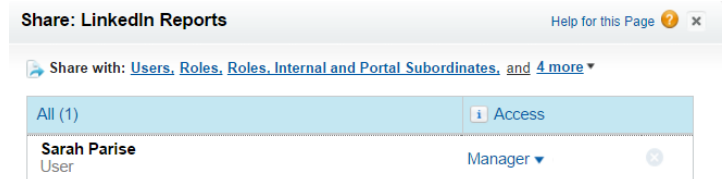
- **Note:** You will need to give access to the Unresolved LinkedIn Activities Folder to all users who will be responsible for the management of incoming LinkedIn Activities.
1. Navigate to your **Reports** tab.
 2. In the **Report Folders** panel on the left-hand side of your screen find the **LinkedIn Reports** folder.
 3. Hover over the LinkedIn Reports folder.
 4. Click the **push-pin** icon that appears.



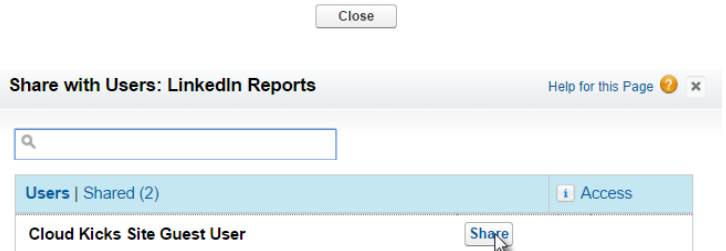
5. Select **Share**.



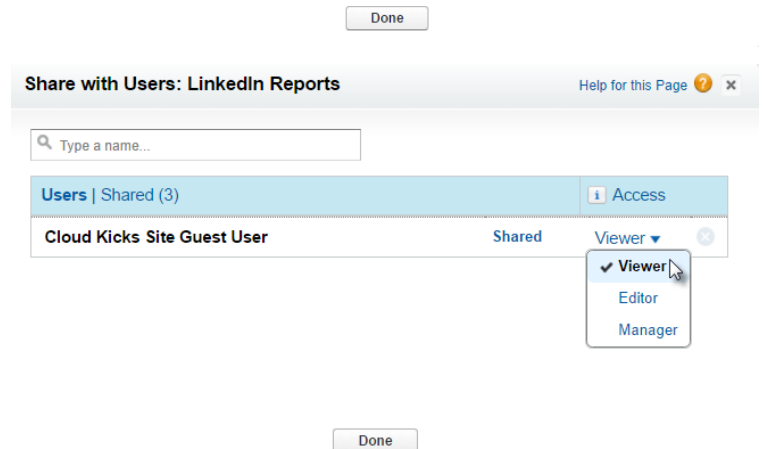
6. Click either **Users**, **Roles** or **Roles and subordinates** to share this folder with the proper users based on your organization's security model.



7. Search for the **Users** or **Roles** you want to share with and then click the **Share** button next to their name.



8. Under the **Access** column click the downward arrow and give the proper access. We recommend **Viewer**, but if you would like you users to be able to make modifications to this report, choose **Editor**.



9. Click the **Done** button.

10. Repeat for all Users or Roles that should have access.

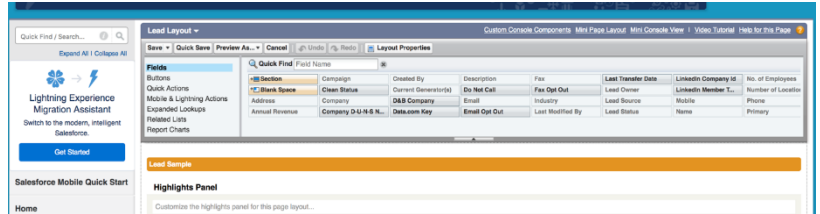
If you require assistance at any point, you can reach LinkedIn Sales Solutions support at: <https://www.linkedin.com/help/sales-navigator/ask>

Add LinkedIn Member Profiles & Company Pages to the (1) Lead & (2) Contact Page Layouts

To view LinkedIn Member Profiles & Company Page information on the (1) Lead and (2) Contact page layouts:

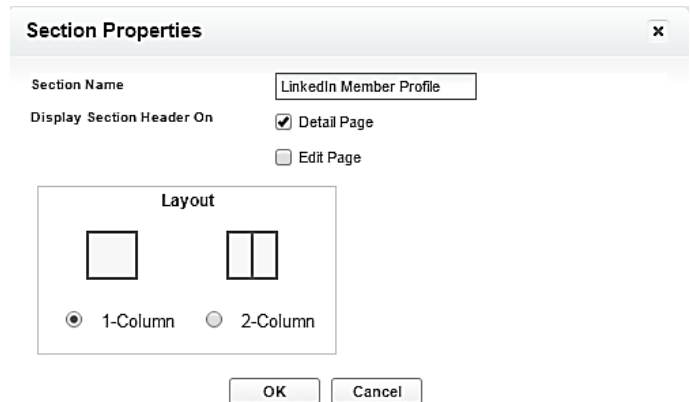
- Lead page layouts add:
 - a. (1a) LeadLinkedInMemberPage
 - b. (1b) LeadLinkedInCompanyPage Visualforce pages to the desired page layouts
- Contact page layouts add:
 - a. (2a) ContactLinkedInMemberPage
 - b. (2b) ContactLinkedInCompanyPage Visualforce pages to the desired page layouts

1. Go to **Setup > Customize > Build > (1) Leads or (2) Contacts > Page Layouts**, and select **Edit** for the appropriate Lead or Contact Page Layout on which you would like to see LinkedIn information.

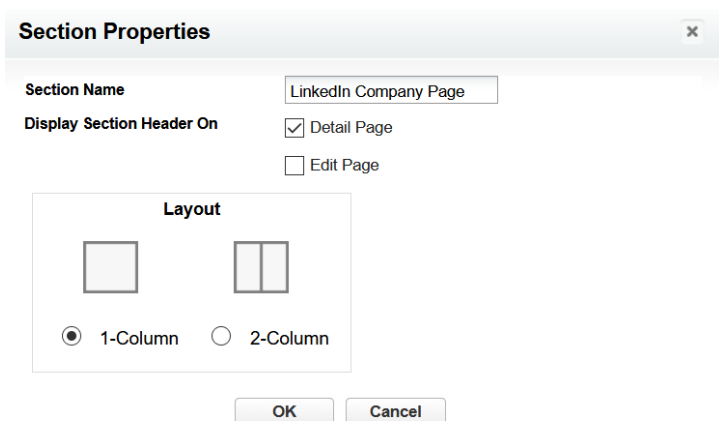


2. Drag a new **Section** down into the layout where you would like to see the LinkedIn member profile. We recommend creating this section at the top to ensure that the Lead or Contact information and LinkedIn profile are visible together.

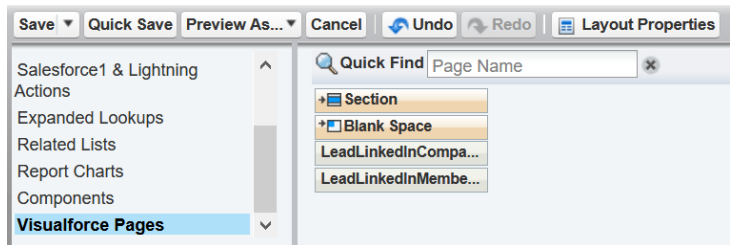
3. As shown in the screenshot, enter the following in **Section Properties** and click **OK**:
 - a. **Section Name** = LinkedIn Member Profile
 - b. **Detail Page** = checked
 - c. **Edit Page** = unchecked
 - d. **Layout** = 1-Column



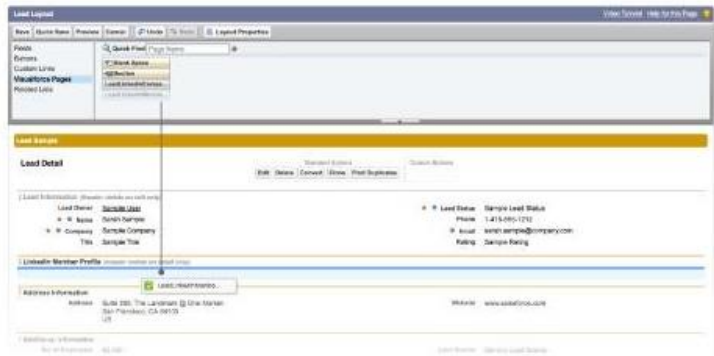
4. Drag in another Section and place this just below the newly created LinkedIn Member Profile Section.
5. As shown in the screenshot below, enter the following in **Section Properties** and click **OK**:
 - a. **Section Name** = LinkedIn Company Page
 - b. **Detail Page** = checked
 - c. **Edit Page** = unchecked
 - d. **Layout** = 1-Column



6. Move to **Visualforce Pages** by using the scroll bar (please see below image):



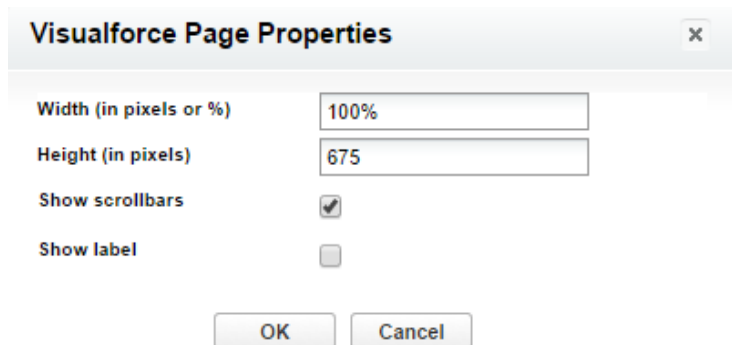
7. Drag one of these pages into the new **LinkedIn Member Profile** section:
 - a. (1a) **LeadLinkedInMemberPage** Visualforce page
 - b. (2a) **ContactLinkedInMemberPage** Visualforce page.



8. Click on the **Properties** icon at the top right of the Visualforce page component.

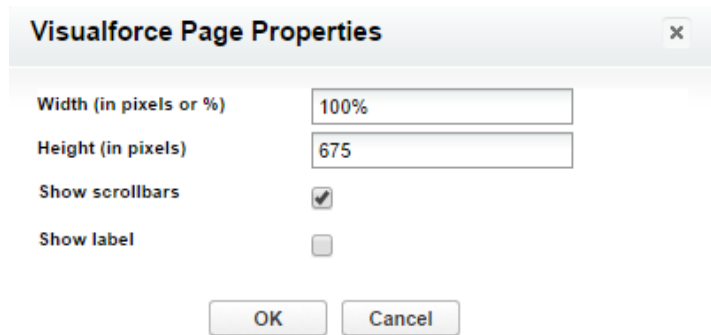


9. As shown in the screenshot, enter the following in **Visualforce Page Properties** and click **OK**:
 - a. **Width** = 100%
 - b. **Height** = 675
 - c. **Show scrollbars** = checked
 - d. **Show label** = unchecked



10. Drag one of these pages into the new **LinkedIn Company Page** section:
 - a. (1b) **LeadLinkedInCompanyPage** Visualforce page.
 - b. (2b) **ContactLinkedInCompanyPage** Visualforce page.
11. Click on the **Properties** icon at the top right of the Visualforce page component.

12. As shown in the screenshot, enter the following in **Visualforce Page Properties** and click **OK**.
 - a. **Width** = 100%
 - b. **Height** = 675
 - c. **Show scrollbars** = checked
 - d. **Show label** = unchecked



13. Additional Step for those upgrading from a Previous Version of the LinkedIn Sales Navigator for Salesforce application and who are using the Professional version of Salesforce.
 - **Note:** If you have Enterprise, Unlimited, Developer, or Sandbox edition and/or if you are installing the LinkedIn Sales Navigator for the first time, **skip to Step 14**.

Previously, Professional had limitations that require the additional step of making the app's custom field visible. This needs to be removed in the updated version of the LinkedIn Sales Navigator.

To remove this field, drag the **LinkedIn Member Token** field into the Lead Information section.



14. Click **Save** at the top of the page to save changes to the (1) Lead or (2) Contact page layout(s).
15. Repeat steps 1-12 for all Lead and Contact page layouts on which you would like to see LinkedIn Member Profiles and LinkedIn Company Pages.

If you require assistance at any point, you can reach LinkedIn Sales Solutions support at: <https://www.linkedin.com/help/sales-navigator/ask>

Adding LinkedIn Company Profiles to the (1) Account & (2) Opportunity Page Layout

To view LinkedIn Company Profiles on the (1) Account and (2) Opportunity page layouts:

- Account page layouts add: (1a) **AccountLinkedInCompanyPage** Visualforce pages to the desired page layouts
- Opportunity page layouts add: (2a) **LeadLinkedInCompanyPage** Visualforce page to the desired page layouts

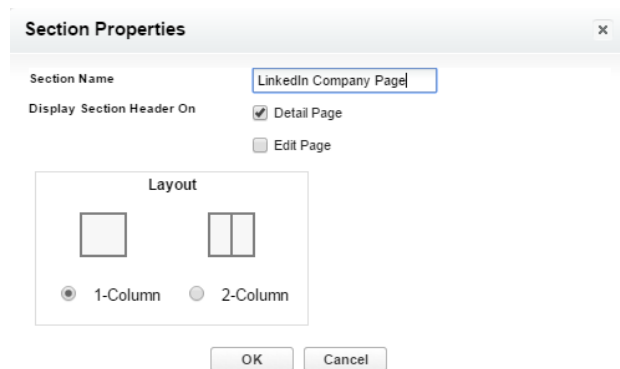
1. Go to **Setup > App Setup (or Build) > Customize > (1) Accounts or (2) Opportunity > Page Layouts**, and select **Edit** for the appropriate Page Layout on which you would like to see LinkedIn Company Pages.

2. Drag a new **Section** down into the layout where you would like to see the LinkedIn company profile. We recommend creating this section at the top to ensure that the account information and LinkedIn profile are visible together.



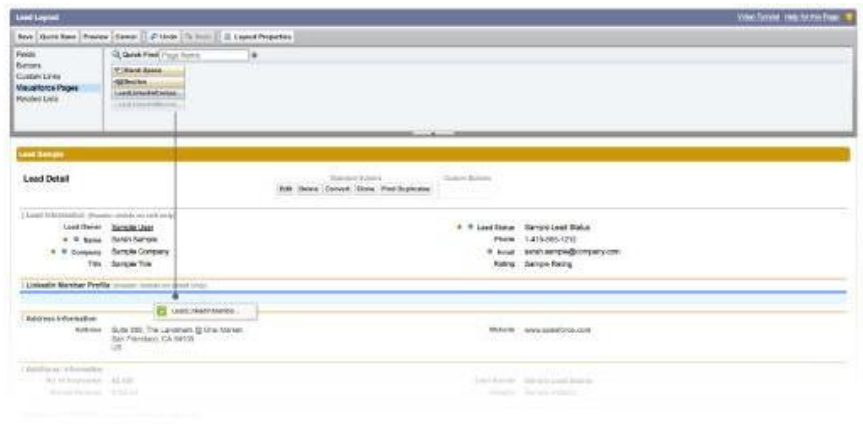
3. Enter the following in **Section Properties** and click **OK**:

- a. **Section Name** = LinkedIn Company Page
- b. **Detail Page** = checked
- c. **Edit Page** = unchecked
- d. **Layout** = 1-Column



4. Drag one of these Visualforce pages into the newly created section:

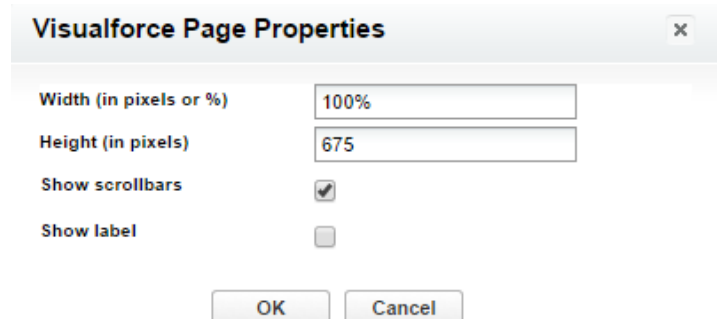
- a. (1a) **AccountLinkedInCompany Page**
- b. (2a) **OpportunityLinkedIn CompanyPage**



5. Click on the **Settings** icon at the top right of the Visualforce page component.

6. Enter the following in **Visualforce Page Properties** and click **OK**:

- a. **Width** = 100%
- b. **Height** = 675
- c. **Show scrollbars** = checked
- d. **Show label** = unchecked



7. Click **Save** at the top of the page to save these changes.

8. Repeat steps 1-7 for Opportunity Page Layout(s) and any additional Page Layouts on which you would like to see LinkedIn Company Pages.

If you require assistance at any point, you can reach LinkedIn Sales Solutions support at: <https://www.linkedin.com/help/sales-navigator/ask>

Phase 3: Test the Application

Congratulations!

You have finished installing and deploying the Sales Navigator for Salesforce application. Please ensure your team has been granted their LinkedIn Sales Navigator Team or Enterprise seats to view the application in Salesforce.

To view the Sales Navigator for Salesforce application, please go to a lead, contact, opportunity, or company record in Salesforce. For your first time viewing the application, you will be asked to login to your LinkedIn profile. Your LinkedIn login will not be required after your initial login. Your experience will match the initial images on Page 1.

NEXT STEP: We highly recommend you proceed to enabling the CRM Sync from within the Sales Navigator Admin settings. (**Note:** requires Sales Navigator Teams or Sales Navigator Enterprise). You may find further information [here](#).

- Sync and write-back functionality is **NOT** supported with Person Account Types.
- Salesforce Professional Edition requires **API Access Enabled** in order for CRM Sync functionality to work (an additional purchase may be required. Contact Salesforce for more details.)

CRM Sync for Sales Navigator:

- Automatically imports Accounts, Leads, and Contacts into Sales Navigator associated with open Opportunities in your CRM.
- Saves information you create in Sales Navigator directly in your CRM, including InMails, Messages, and Notes, with optional write-back.
- Enablement requires less than 10 minutes.

For further information regarding CRM application, CRM sync, and CRM security and technical documentation, along with using your CRM for Seat Management in Sales Navigator, please visit [here](#).

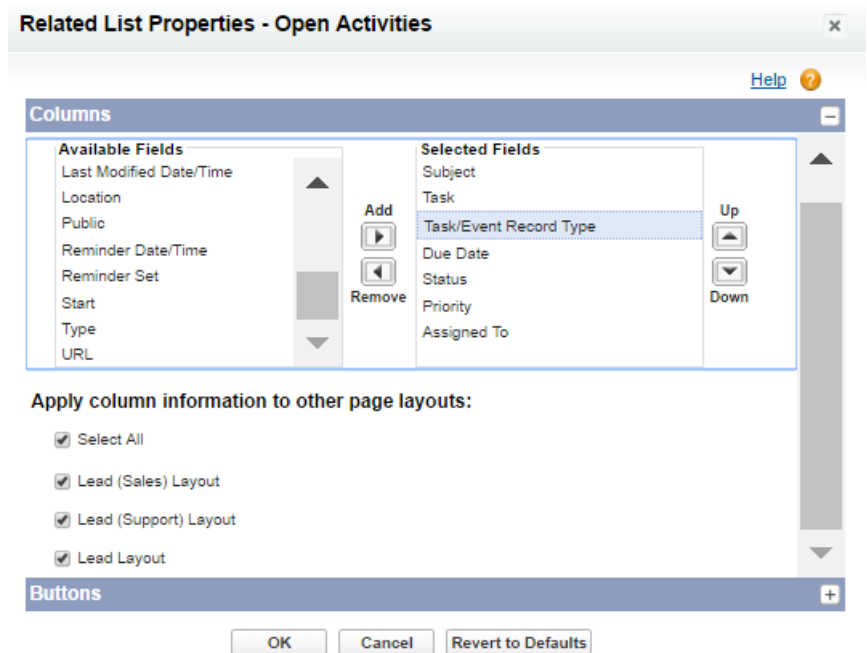
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Additional Information and Troubleshooting Tips

Optional: Add the Record Type to your Activities Related Lists

If you would like to add the **Activity** Record type to your Lead and Contact related lists:

1. Go to **Setup > Page Layouts > Leads > Page Layouts**.
2. Click the **Edit** link next your first page layout.
3. Scroll to the Related List **Open Activities** and click the **Wrench Icon**.
4. Move the **Record Type** field from the list of **Available Fields** to the list of **Selected Fields** by clicking the Arrows.
5. Under the **Apply column information to other page layouts**: click the **Select All** option, or choose just the page layouts relevant to this change.
6. Click the **Ok** button.
7. Repeat steps 3-6 for the **Activity History** related list.
8. Repeat steps 1-7 for the Contact object.



Enabling Apex Class Access and Adding Visualforce Pages

If you did not grant access to all users in the installation step, you will need to enable Apex Class Access and add Visualforce pages to the specific profiles you would like to be able to access the application.

- **Note:** Steps 1 – 3 are only needed for Dev Orgs. Please move to Step 4 if you are not using a Dev Org.
1. Go to **Setup > Administration Setup (or Administer) > Manage Users > Profile** and select the profile for which you want to enable access to the app.
 2. **Hover over the Enabled Apex Class Access link. Select Edit.**



3. Select the following items from the **Available Apex Classes** list, add it to the **Enabled Apex Classes** list, and select **Save**.
 - a. **LID.SalesNavigator ProfileController**
 - b. **LID.SalesNavigator ProfileHelper**

Enable Apex Class Access



4. Hover over the **Enabled Visualforce Page Access** link. Select **Edit**.



5. Select the following pages from the **Available Visualforce Pages** list, add them to the **Enabled Visualforce Pages** list, and select **Save**.
 - a. **LID.AccountLinkedIn CompanyPage**
 - b. **LID.ContactLinkedIn CompanyPage**
 - c. **LID.ContactLinkedIn MemberPage**
 - d. **LID.LeadLinkedIn CompanyPage**
 - e. **LID.LeadLinkedIn MemberPage**
 - f. **LID.Linkedin ActivityPage**

Enable Visualforce Page Access



6. Repeat steps 1-5 for every profile you would like to be able to access the application.

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

Undo Lead Mapping for Previous users of the LinkedIn Sales Navigator

In previous versions of the LinkedIn Sales Navigator if you wanted the member and company associations to propagate to accounts and contacts after lead conversion, you will need to map the corresponding lead fields. You no longer need to do this. If you are installing LinkedIn Sales Navigator for the first time, please skip to Phase 6. To remove this lead mapping:

1. Go to **Setup > App Setup (or Build) > Customize > Leads > Fields**, and scroll down to **Lead Custom Fields and Relationships**. Click **Map Lead Fields**.

Lead Custom Fields & Relationships				
Action	Field Label	API Name	Installed Package	Data Type
Edit	Correlation Data	SFGA__Correlation_Data__c	Salesforce for Google AdWords	Long Text Area
Edit	CorrelationID	SFGA__CorrelationID__c	Salesforce for Google AdWords	Text(255)
Edit	LinkedIn Company Id	LID__LinkedIn_Company_Id__c	LinkedIn for Salesforce	Text(80)
Edit	LinkedIn Member Token	LID__LinkedIn_Member_Token__c	LinkedIn for Salesforce	Text(80)
Edit	Web Source	SFGA__Web_Source__c	Salesforce for Google AdWords	Text(255)

2. Select the custom fields of **LinkedIn Company Id** and **LinkedIn Member Token**, and map them to **None**.
3. Click **Save**.

Lead Custom Field Mapping

Map each of your organization's lead custom fields to one of your custom account, contact, or opportunity fields

Lead Custom Field Mapping

Take this lead custom field...	...and map it to this field
Current Generator(s)	<input type="text" value="--None--"/>
LinkedIn Company Id	<input type="text" value="--None--"/>
LinkedIn Member Token	<input type="text" value="--None--"/>
Number of Locations	<input type="text" value="--None--"/>
Primary	<input type="text" value="--None--"/>
Product Interest	<input type="text" value="--None--"/>
SIC Code	<input type="text" value="--None--"/>

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