LinkedIn Sales Navigator for MS Dynamics 2016 and 365 Installation Guide

The installation process will take less than 30 minutes

The LinkedIn Sales Navigator for Microsoft Dynamics application (widget)

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

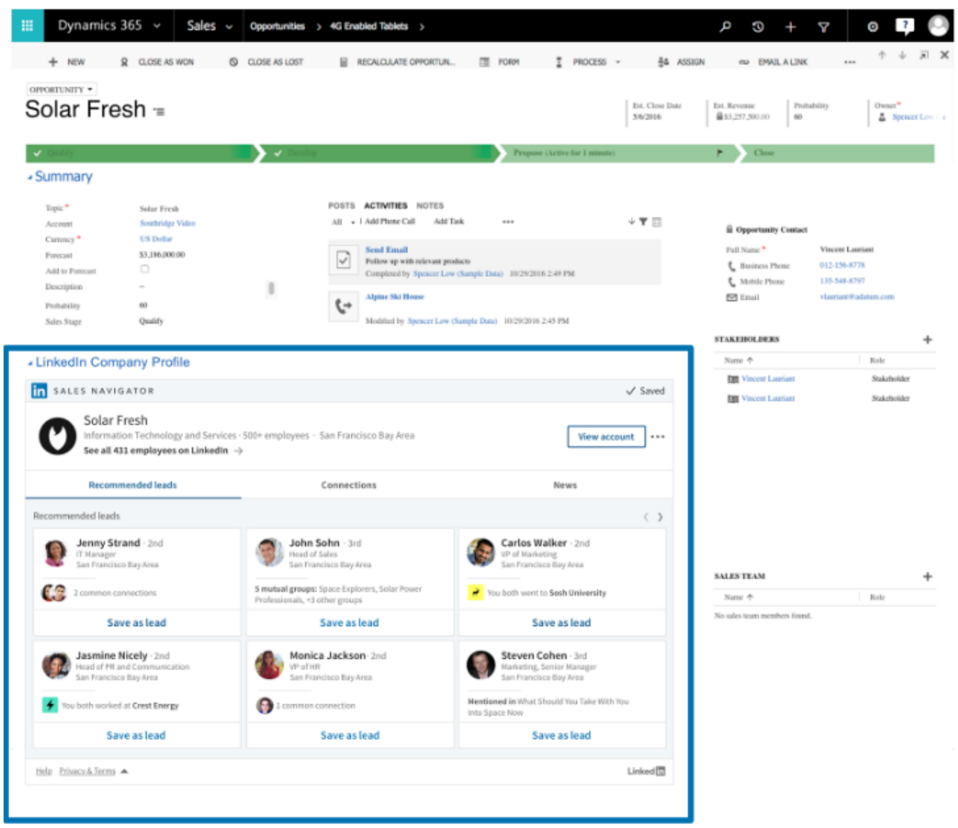

Image of completed Sales Navigator for Dynamics widget installation

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Before You Begin

- The solution works with Microsoft Dynamics 365 and Dynamics CRM 2016, versions 8.2+ and 9.x. However, certain features are only available if you are running Microsoft Dynamics 365 (online).
- This installation is required for you to enable the sync between Dynamics and Sales Navigator, including write-back from Sales Navigator to Dynamics.
- This installation is required for you to enable the sync between Dynamics 365 and Sales Navigator, including write-back from Sales Navigator to Dynamics 365.
- You will need to be a System Administrator to import and configure the solution.
- You will need a LinkedIn account. Join now.
- You will need to sign your team up for LinkedIn Sales Navigator Team or LinkedIn Sales Navigator Enterprise.
- 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 enable JavaScript in your browser. You will also need to have the most up-to-date version of Flash Player installed.
- You will need to disable your pop-up blocker in Internet Explorer or Edge.

Import the Solution

Download the LinkedIn Solution for Dynamics to a location on your computer. Do not unzip the file. Microsoft Dynamics CRM solutions are meant to be imported as a full zip file.

1. Log into your Microsoft Dynamics CRM environment.
2. Expand the Main Areas pane by selecting the drop-down at the top of your Dynamics window. *Note: Drop-downs differ in appearance in Dynamics 2016 and 365.*

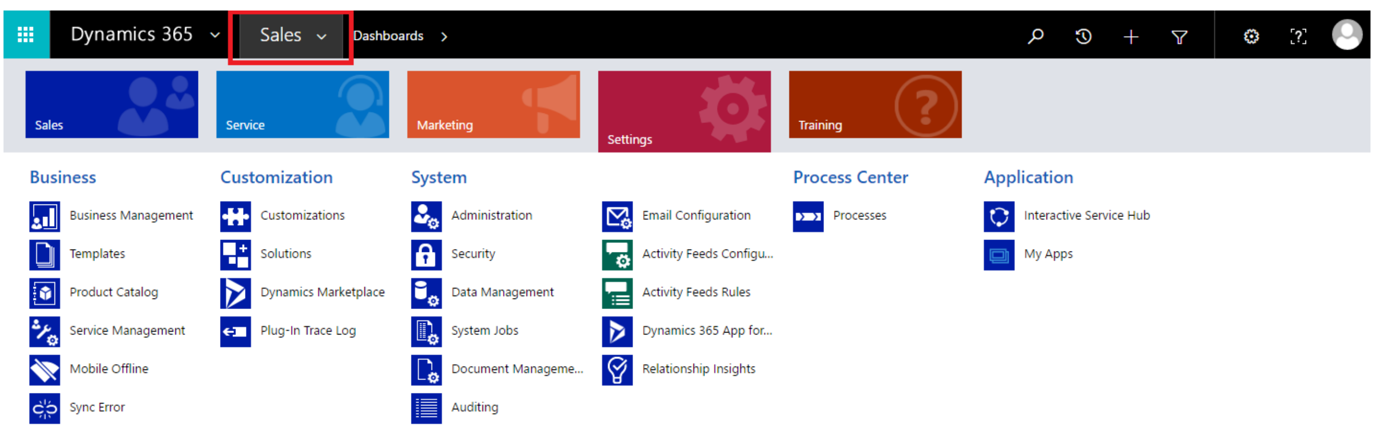
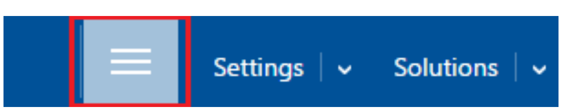
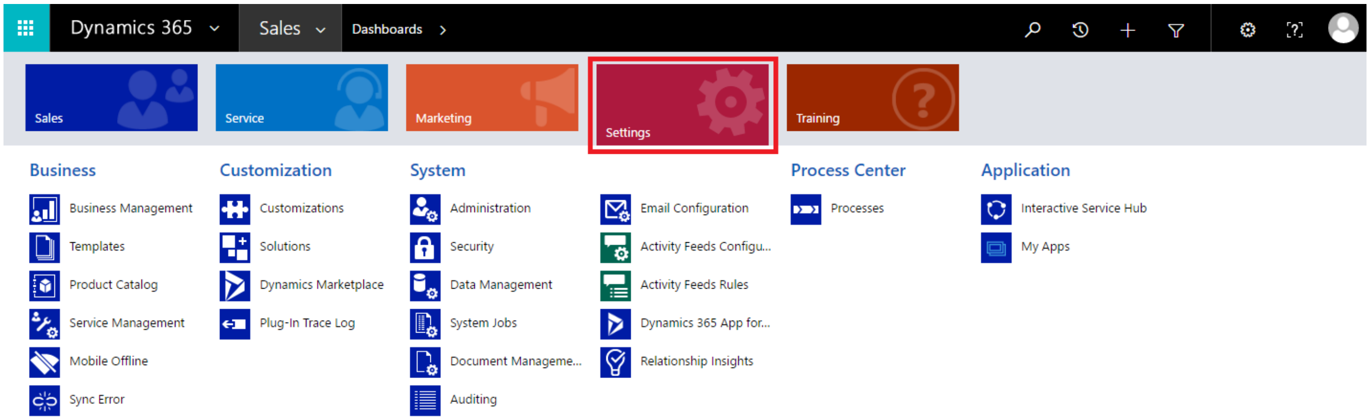


Image above is for Dynamics 365

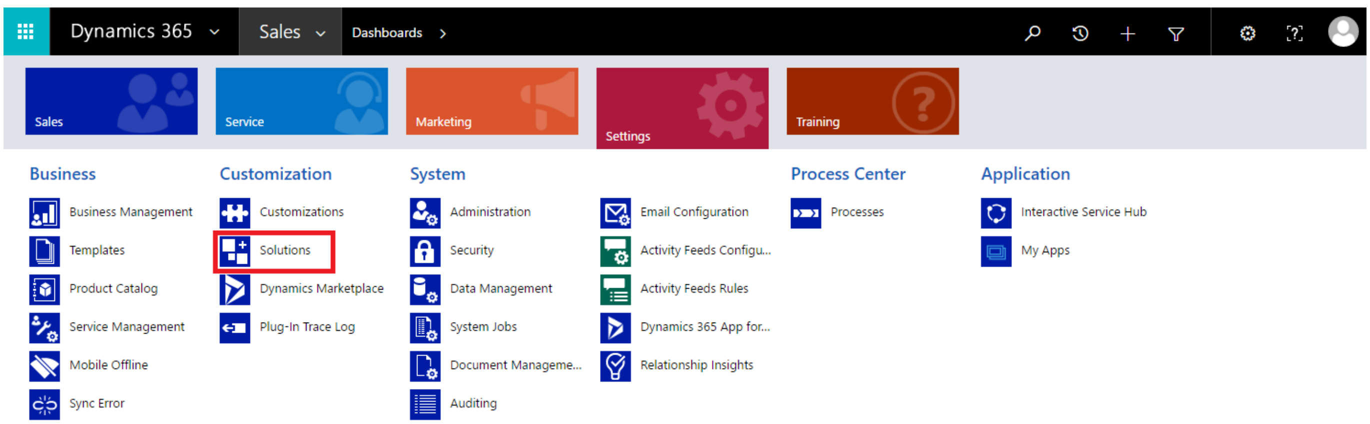
If you are using Dynamics 2016, the button to expand the drop-down will look like so:



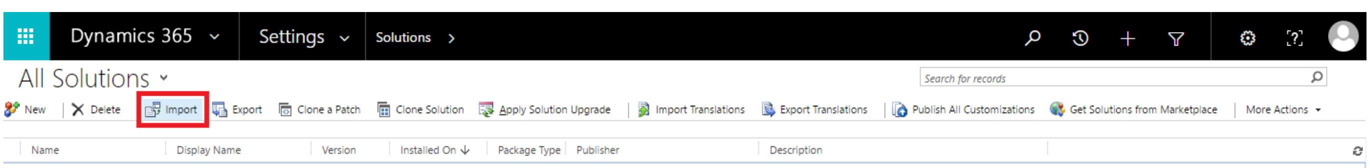
3. Click "Settings” in the drop-down pane.



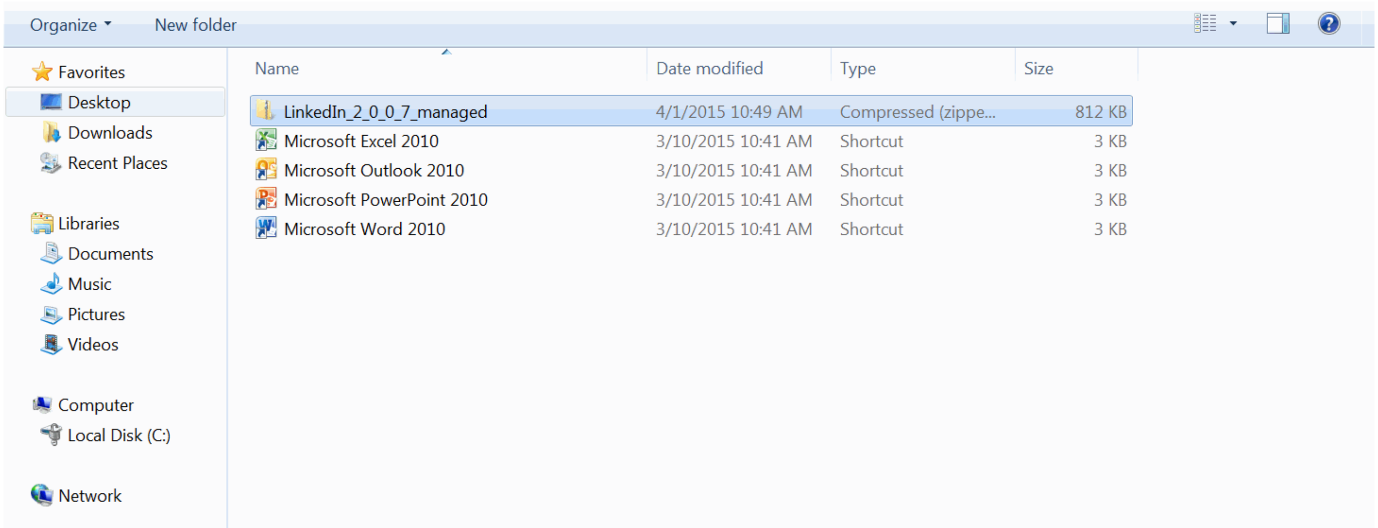
4. "Click “Solutions”.



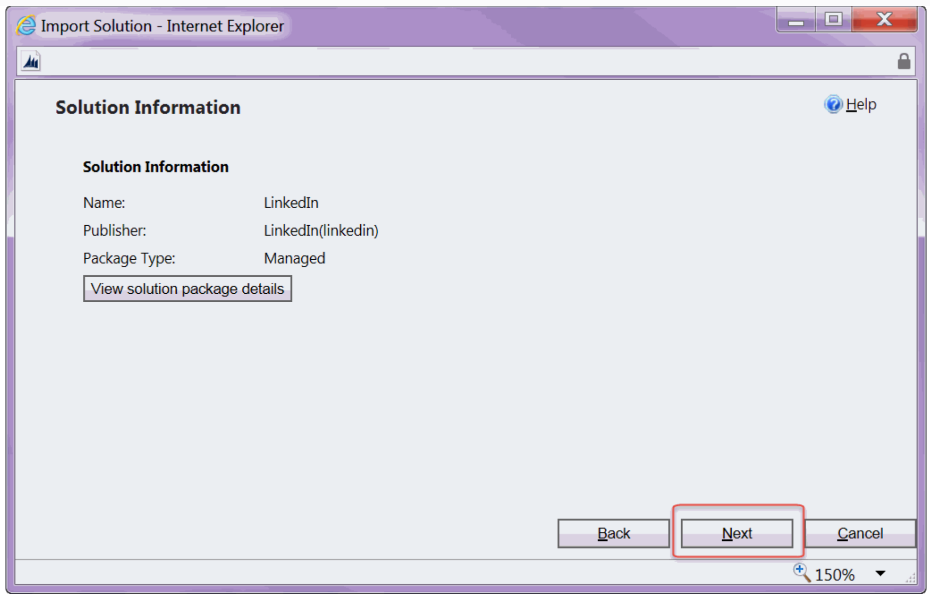
5. Click “Import”



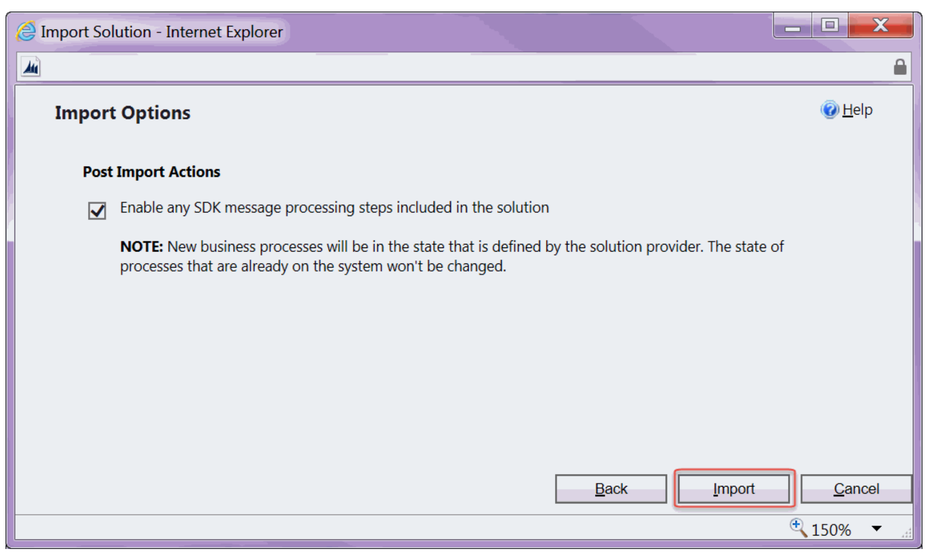
6. Browse for the solution file you downloaded and saved and click "Open", then “Next”.



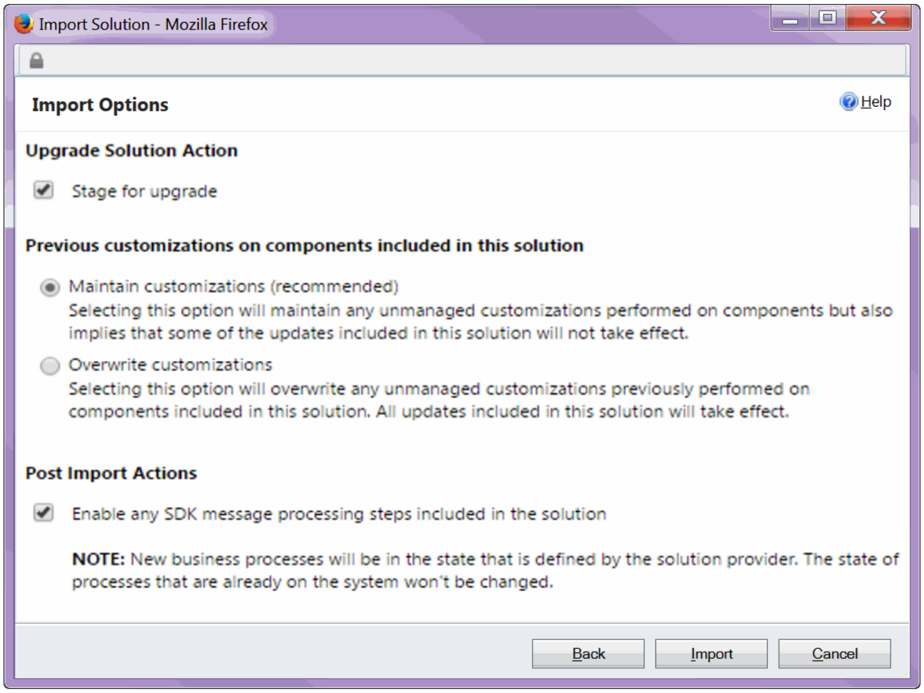
7. Click "Next" on the Solution Information page.



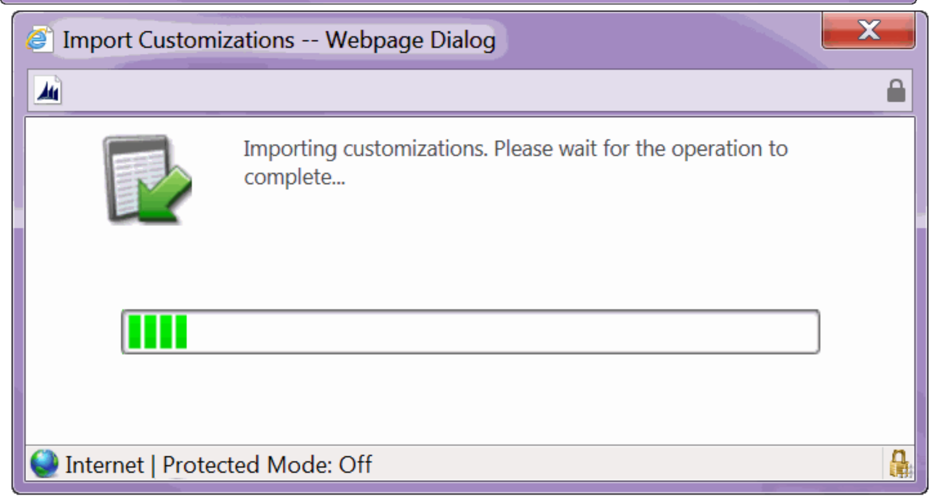
8. Check the box that says "Enable any SDK message processing..." and click "Import."



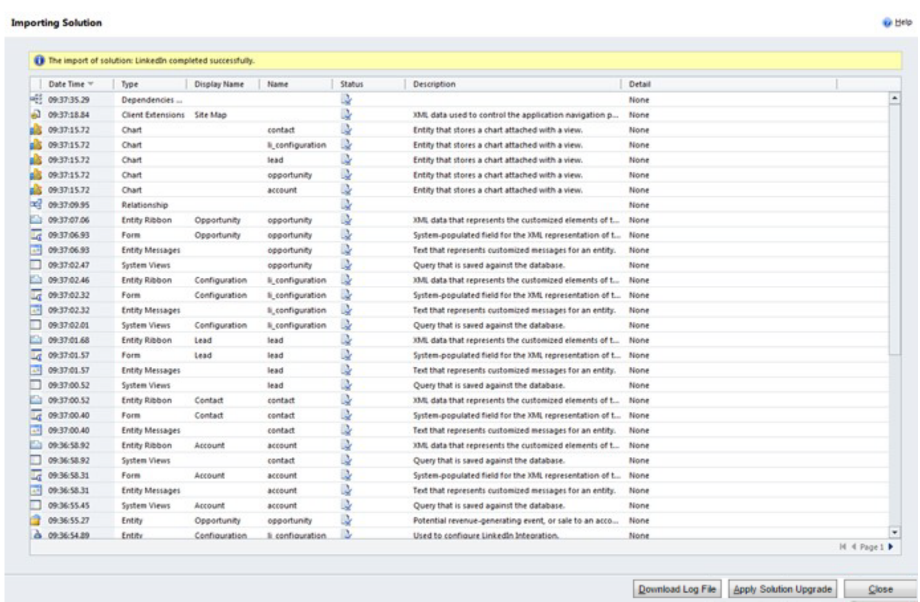
Please note that if you are upgrading from an older solution, you must also select “Stage for upgrade” and “Maintain Customizations” (see image below).



9. A dialog box will pop up showing progress of the import. After the green progress bar has finished, click "Next." This may take up to a few minutes.



10. Once the import process completes, a summary window will display all the imported components, indicating the solution import completed successfully. If you are upgrading from an older solution, click on the “Apply Solution Upgrade button”, otherwise click "Close."

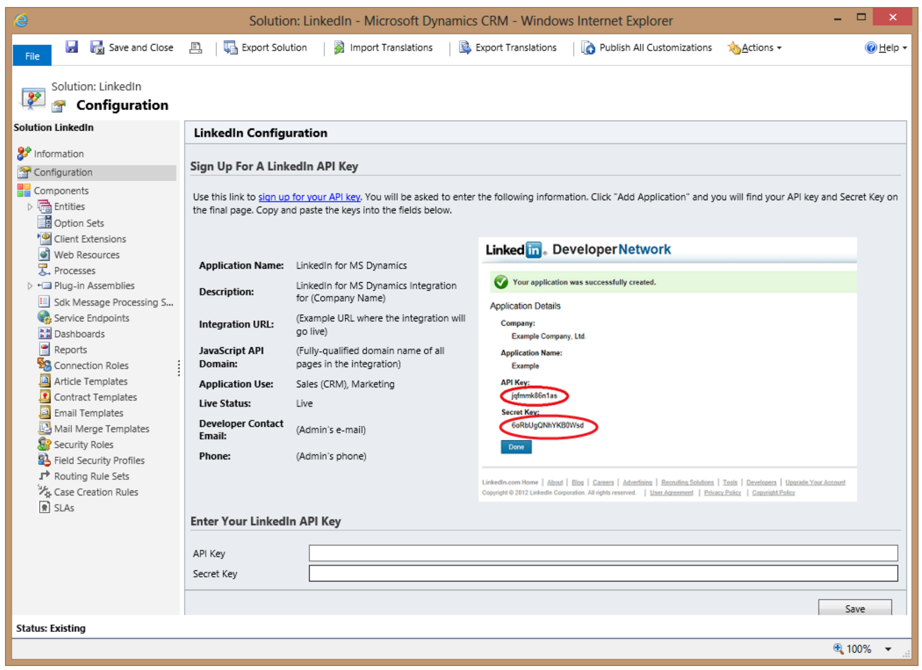


11. Additional Steps for Microsoft Dynamics CRM On-Premise.

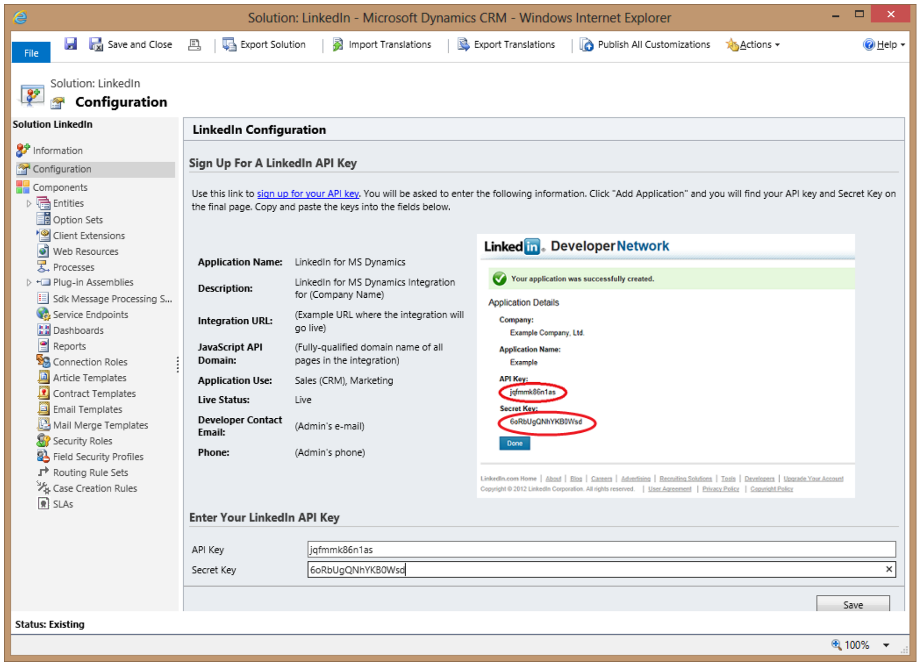
a. If you use Microsoft Dynamics CRM Online (URL ends in crm.dynamics.com), your import and configuration of the LinkedIn Solution is complete and you can move on to [Test the Solution](#).

b. Microsoft Dynamics CRM On-Premise environments require an additional step of registering an API key and assigning users a LinkedIn Configuration security role to use the Solution.

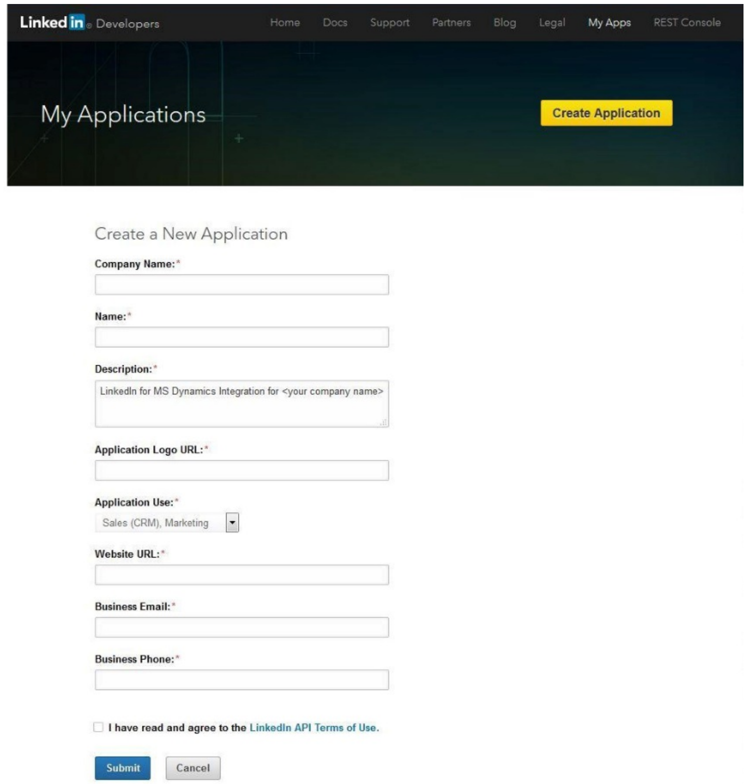
12. Go to "Settings" → "Solutions" and click on the LinkedIn Solution.



13. Click "Configuration" in the top left under "Information." Click on the "Sign up for your API key" link.



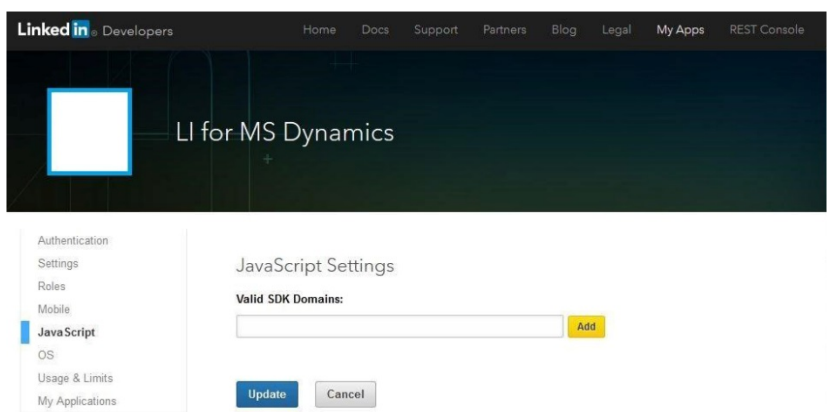
14. If you are not logged into LinkedIn, a login page will appear. After logging in, you will see the [following screen](). Please enter the following information and click "Submit."
    a. **Company Name**: <Your company name>
    b. **Name:** "LI for MS Dynamics"
    c. **Description:** "LinkedIn for MS Dynamics Integration for <your company name>"
    d. **Application Logo URL:** <URL for your company's logo, which **must** be hosted using a secure (HTTPS) protocol (Please provide your application's logo image, in PNG or JPEG format. The image must be square and at least 80 x 80 pixels, and no larger than 5 MB in size)>
    e. **Application Use:** Sales (CRM), Marketing
    f. **Website URL:** <URL for your CRM On-Premise environment - You can copy and paste this URL from the browser bar when you're logged into the CRM>
    g. **Business Email:** <Company email address>
    h. **Business Phone:** <Company phone number>



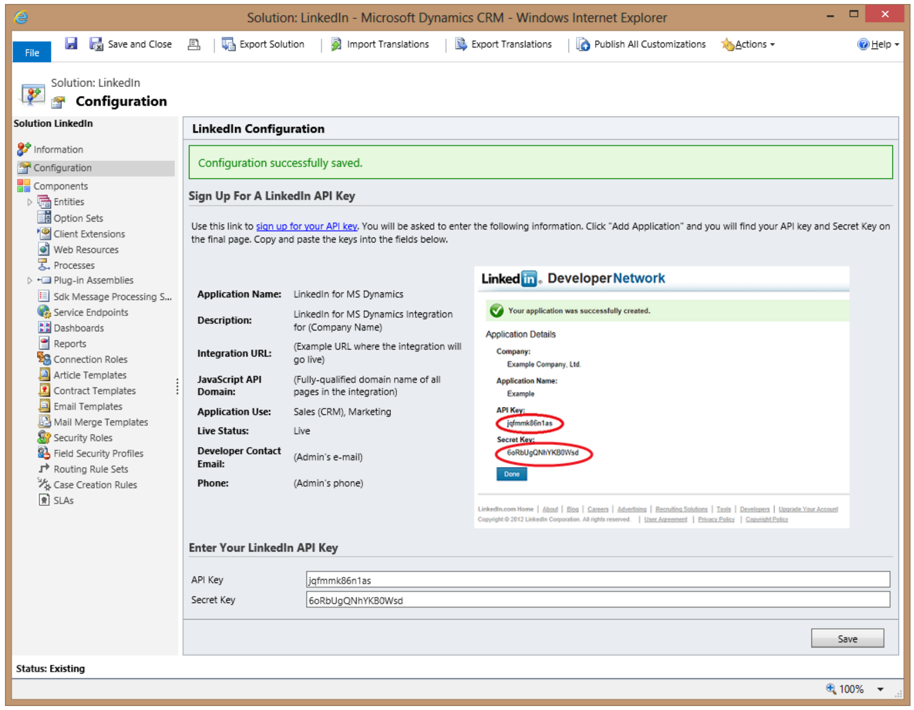
15. The next page will display an API key and a Secret Key. Copy these values and paste them back into the CRM Configuration page.

16. Under **Default Application Permissions**, ensure that only "r_basicprofile" is checked. Click "Update."

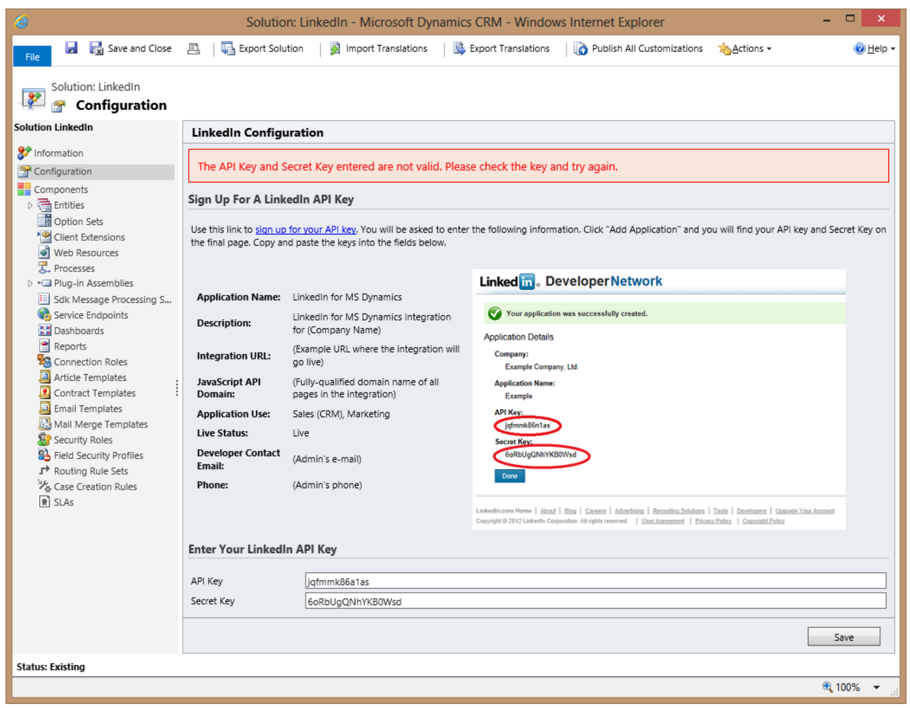
17. ****This step is critical for integration.**** Click "JavaScript" on the left menu. For **Valid SDK Domains**, enter a fully qualified domain of your CRM On-Premise environment. This is the URL that you entered for **Website URL**, up until the first slash '/'. Click "Add" and then Click "Update." *Note: If you have multiple domains, then you can enter them on this page.*



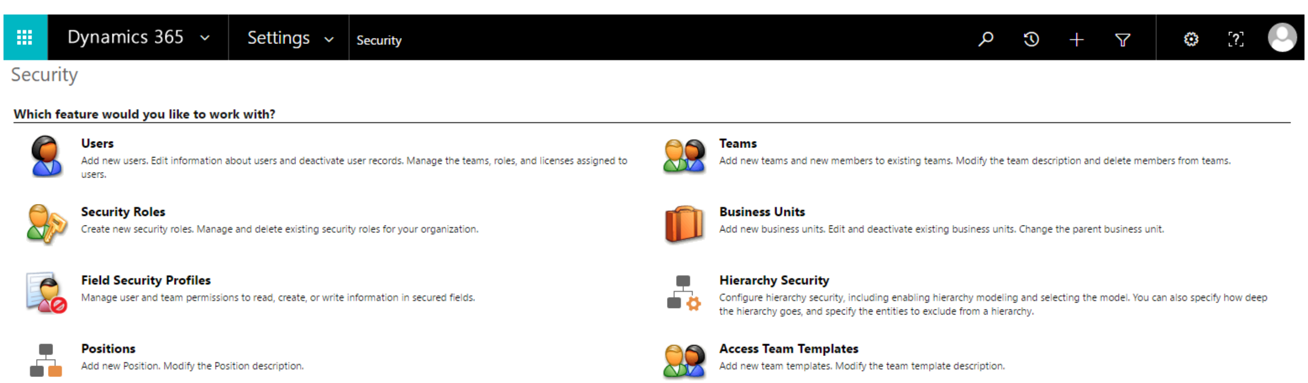
18. Return to your CRM Configuration page. Click "Save" to validate the API Key and Secret Key. If your values are correct, you will see the following confirmation message. Click "OK" and move to step 20.



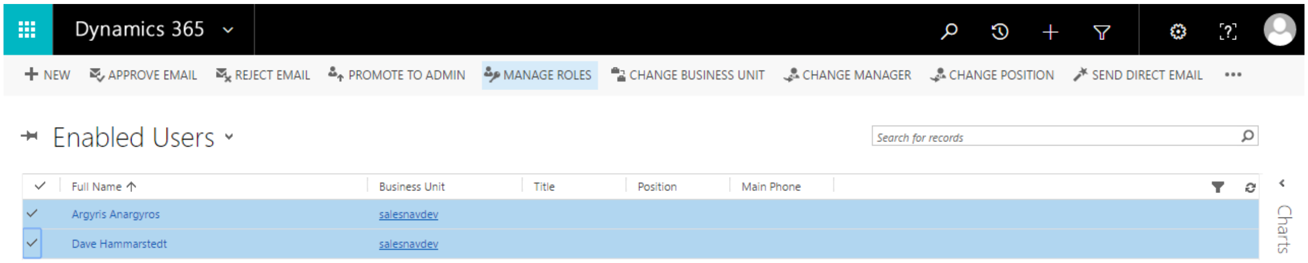
19. If your values are incorrect, you will see the following error message, prompting you to double check your API key values and re-save:



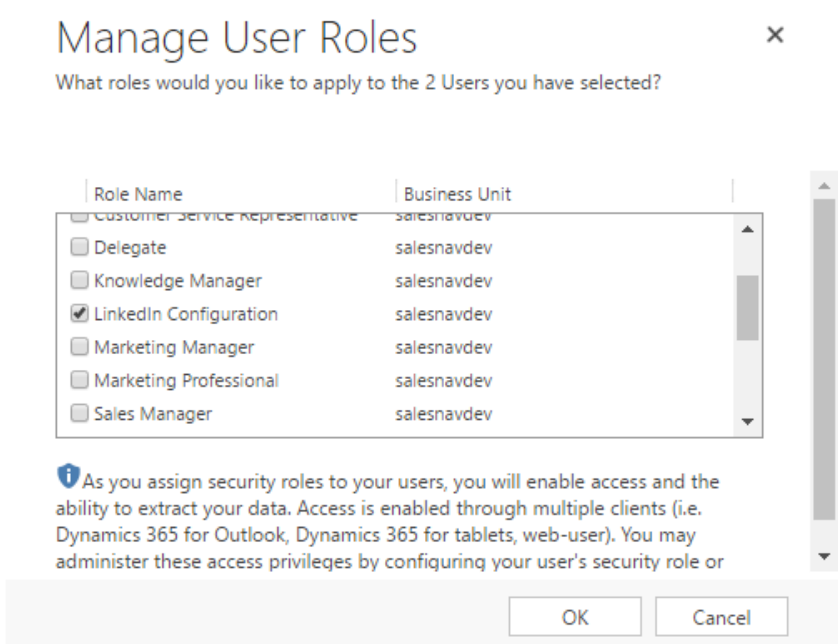
20. The last step is to assign all users a "LinkedIn Configuration" security role to give them access to the integration. In the All Areas drop down, navigate to "Settings" → "Security" and click on "Users".



Select all users and click "Manage Roles" at the top.



A dialog box will pop up as shown in the screenshot. Check "LinkedIn Configuration" and click OK.



Test the Solution

Congratulations!

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

To view the Sales Navigator for Dynamics widget, please go to a lead, contact, opportunity, or company record in Dynamics. For your first time viewing the widget, 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 image on Page 1.

Next step: We highly recommend you proceed to enabling the CRM Sync. You may find further information [here](#).

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.**

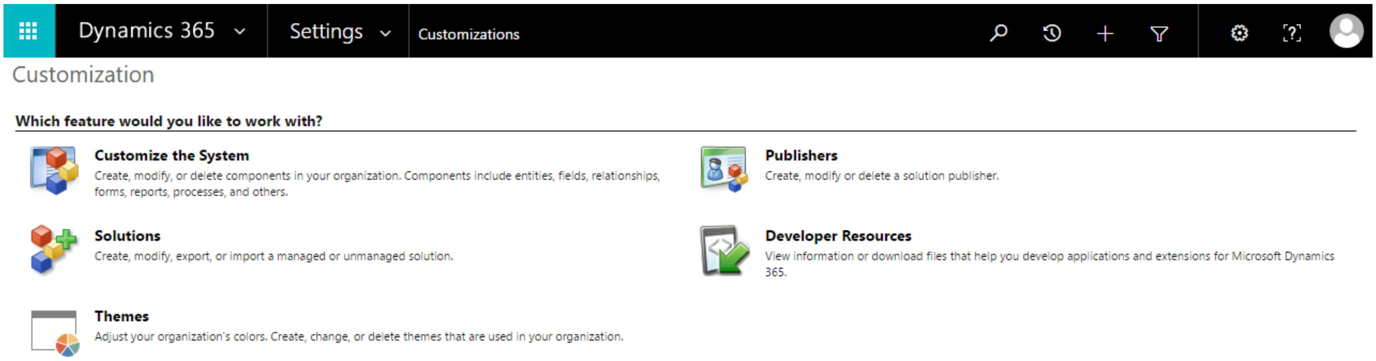
For further information regarding CRM application/widget, CRM sync, and CRM security and technical documentation, along with using your CRM for Seat Management in Sales Navigator, please visit [here](#).

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

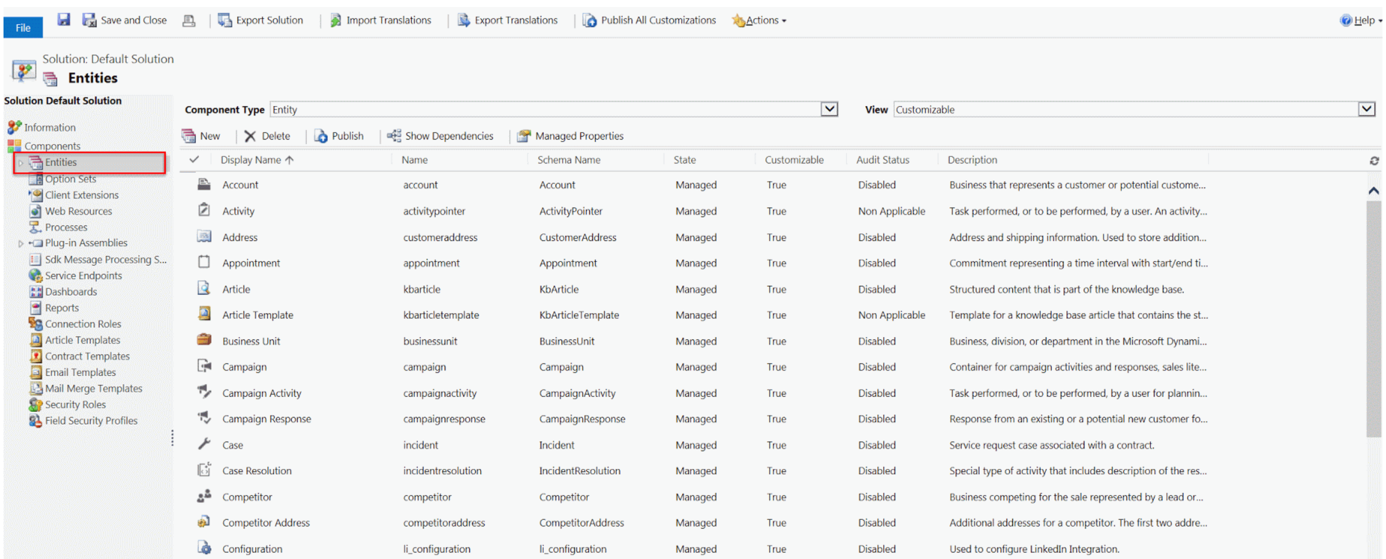
Optional - Setting up Role-Based Forms

You have the option to limit the LinkedIn integration to only a subset of users by creating additional forms. You can alter the default "Information" form to remove the LinkedIn member and company profiles, and then create a new "LinkedIn Integration" form with the profiles present.

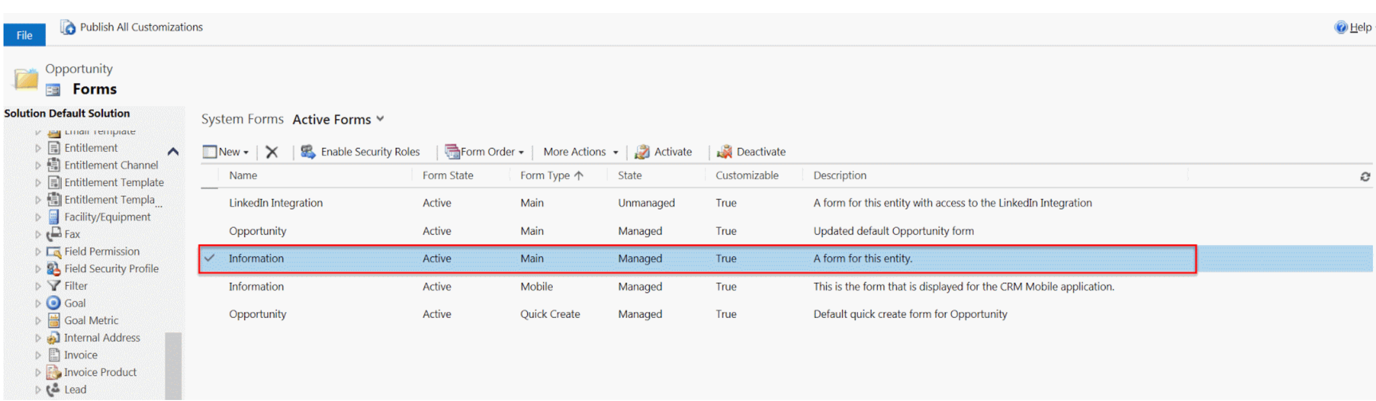
1. In the All Areas menu, click "Settings" → "Customizations" and choose "Customize the System."



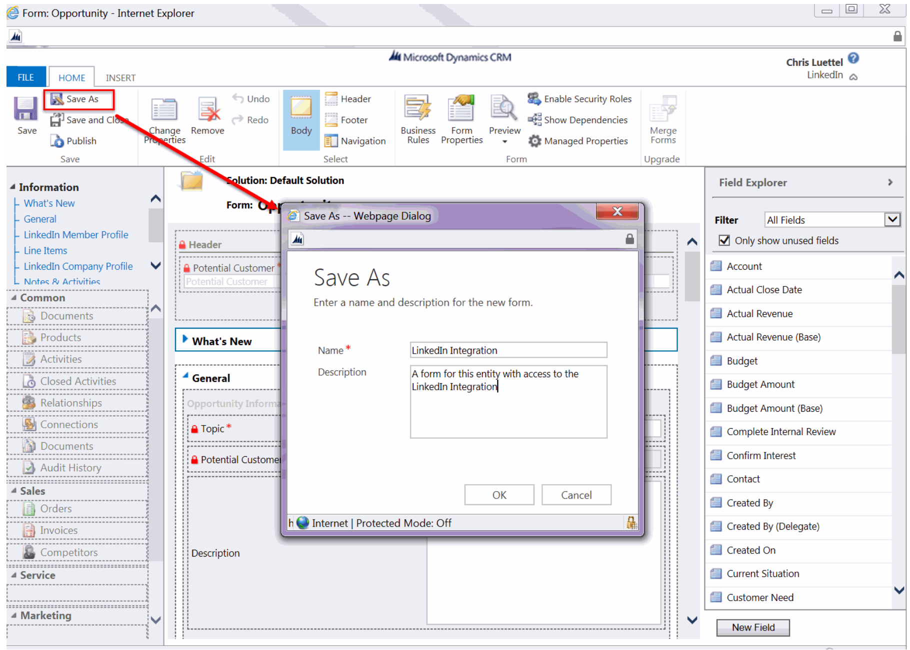
2. Go to "Entities" and select the entity you want to customize. This example will customize "Opportunity."



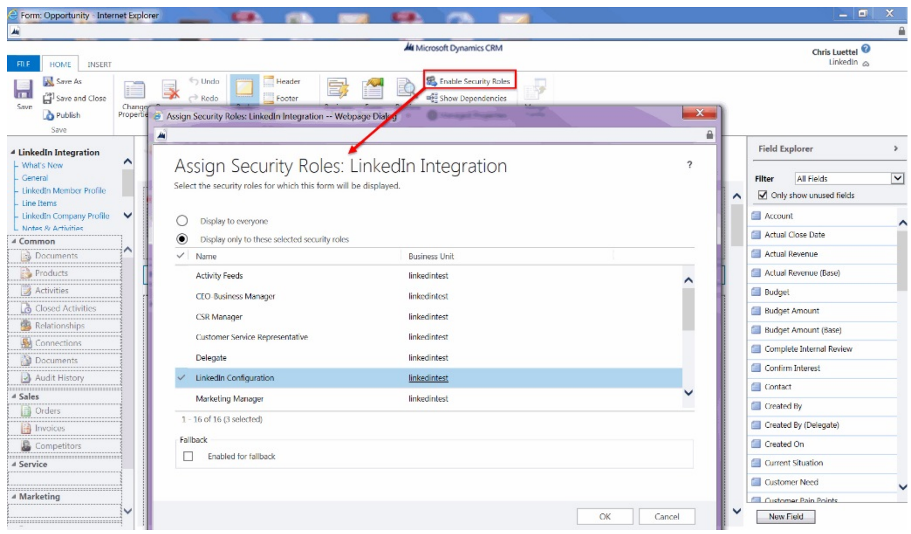
3. Go to "Forms" and open the "Information" form.



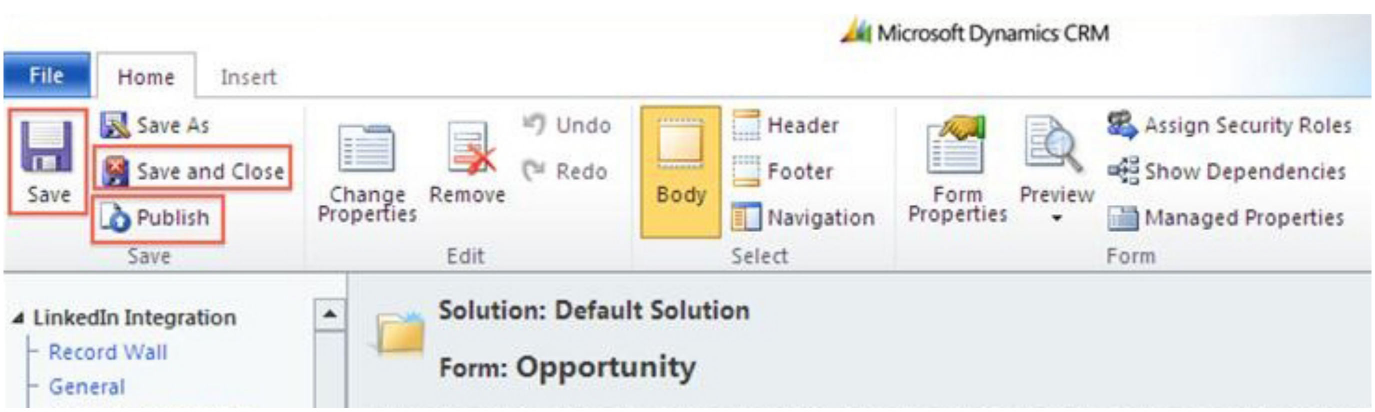
4. Click "Save As" and rename the form to "LinkedIn Integration." Include a description: "A form for this entity with access to the LinkedIn Integration," and click "OK."



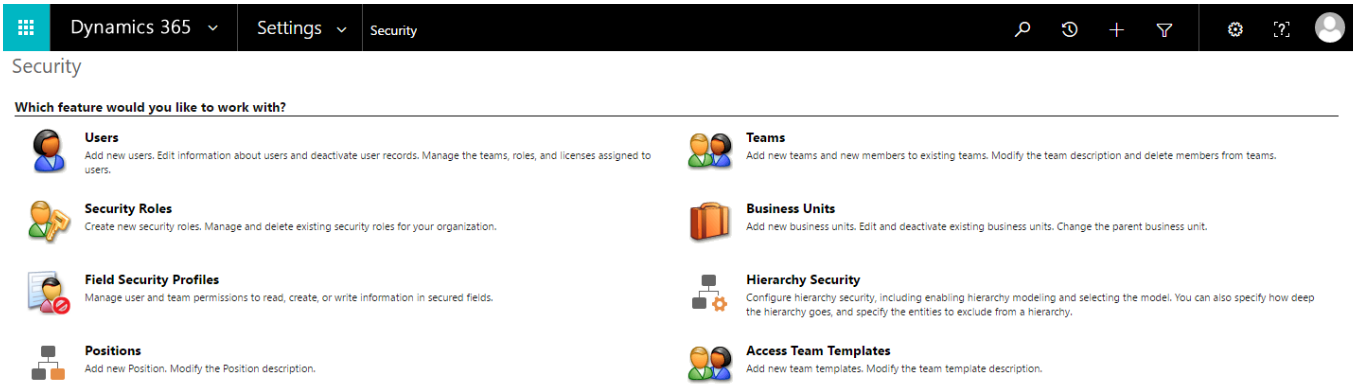
5. Click "Enable Security Roles" at the top. A dialog box will pop up as shown in the screenshot. Check "LinkedIn Configuration" and click OK.



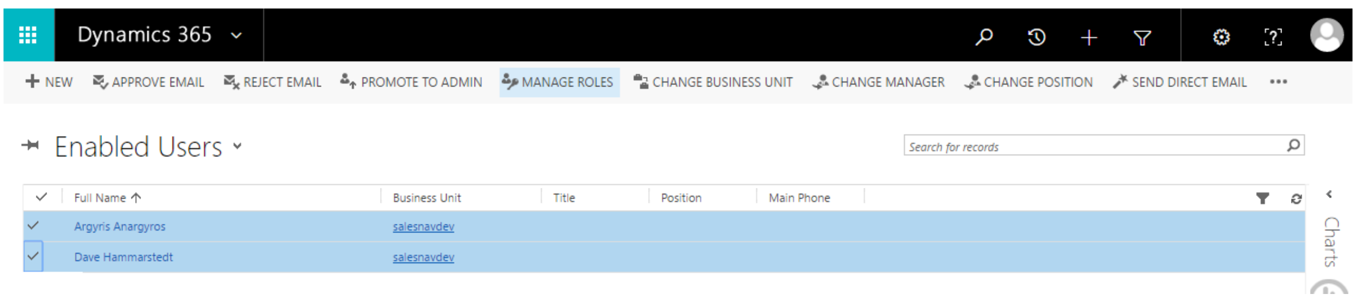
6. Click "Save", "Publish", and "Save and Close" in the top left to save your changes.



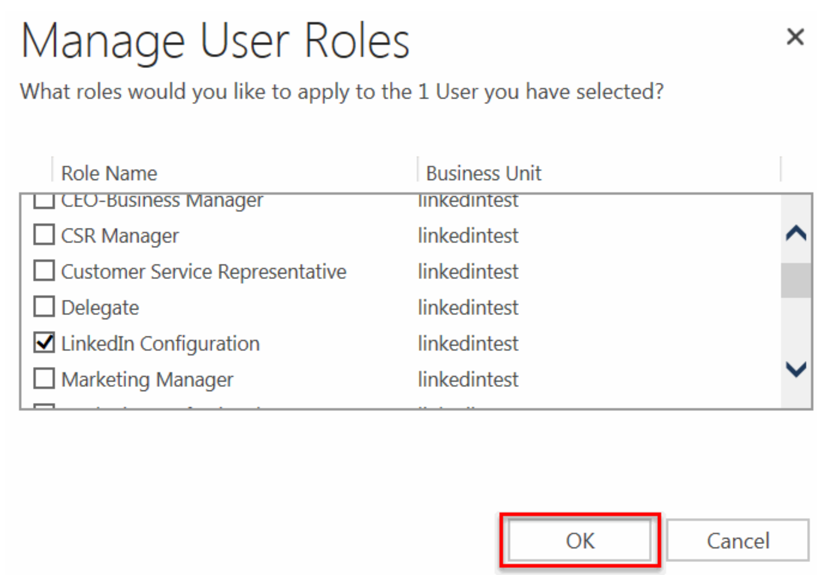
7. Open the "Information" form.
8. Select the "LinkedIn Member Profile" form and click "Remove."
9. Repeat step 8 for "LinkedIn Company Profile."
10. Click "Save", "Publish", and "Save and Close" in the top left to save your changes.
11. Repeat for other entities and forms if desired.
12. The last step is to assign the subset of users a "LinkedIn Configuration" security role to give them access to the integration. Go to "Settings" → "Security" and click on "Users".



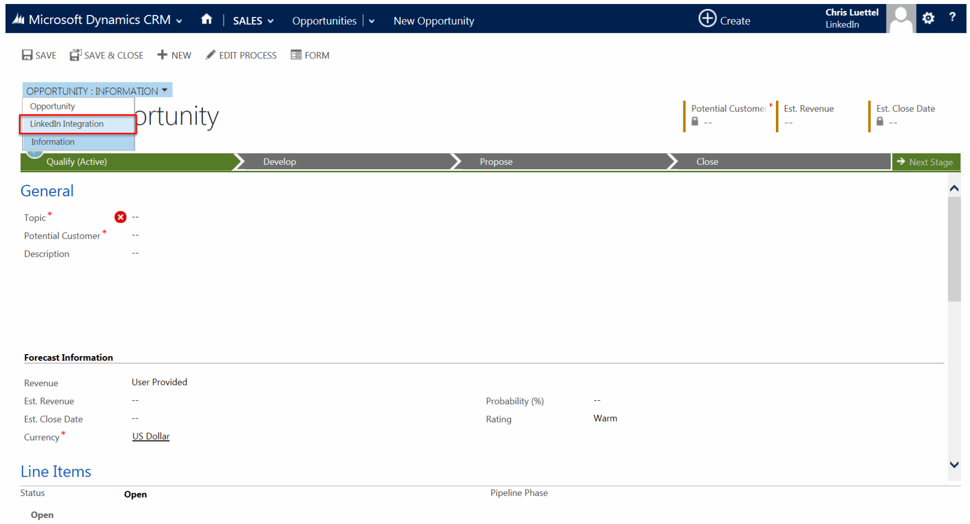
13. Select the users you want to give access to the LinkedIn Integration and click "Manage Roles" at the top.



14. A dialog box will pop up as shown in the screenshot. Check "LinkedIn Configuration" and click OK.



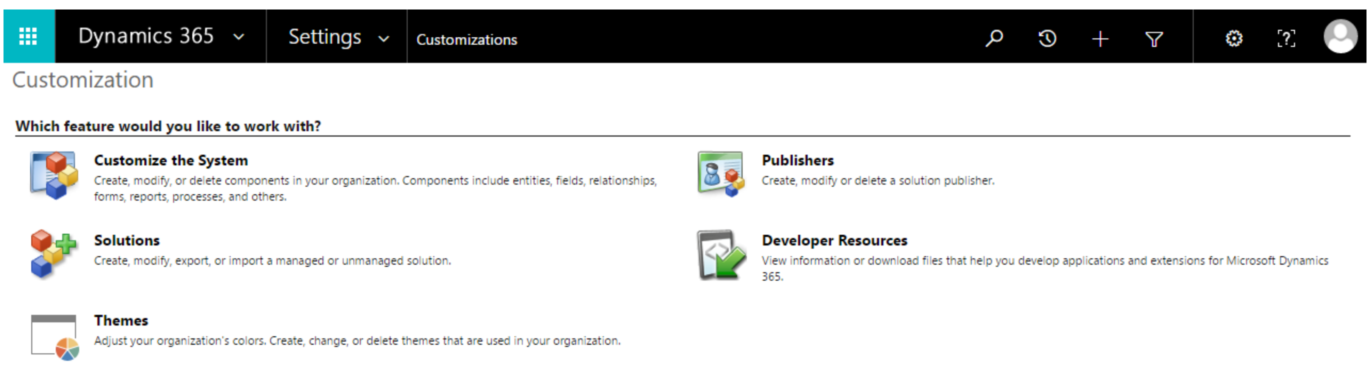
15. Now, only users given the "LinkedIn Configuration" role will be able to view the "LinkedIn Integration" form. As shown in the screenshot, the user can select the "LinkedIn Integration" form when viewing the entity, and that form will become the default form for that user.



Optional - Editing Form Layouts

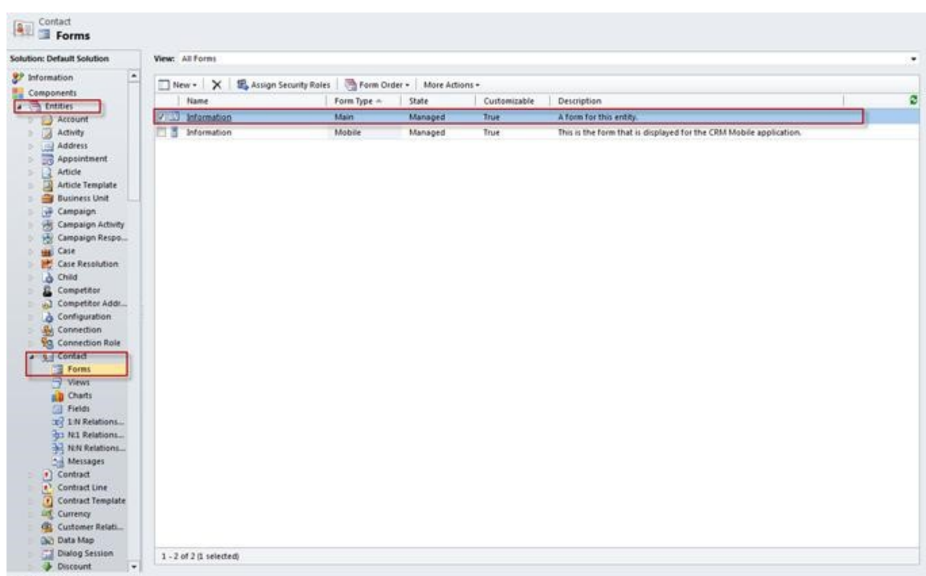
You have the option of modifying the layout of the LinkedIn member and/or company profiles on any of the entity forms. Doing so can be helpful if you want the LinkedIn integration on some, but not all of the entities. We also recommend moving the LinkedIn member and company profiles near the top of each entity form. If you would like to add the Company or Member profile to your own forms, please use the provided forms as an example. To modify the form layout, follow the same customization steps as you would with any other form modification:

1. Go to "Settings"→ “Customizations" and click "Customize the System."



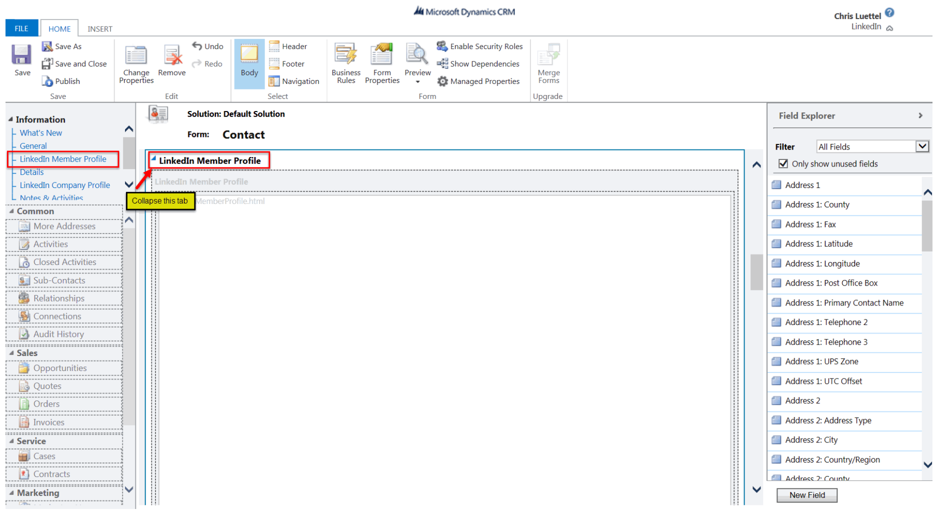
2. Go to "Entities" and select the entity you want to customize. This example will customize "Contact."

3. Go to "Forms" and open the form you want to customize. This example will customize the main "Information" form.

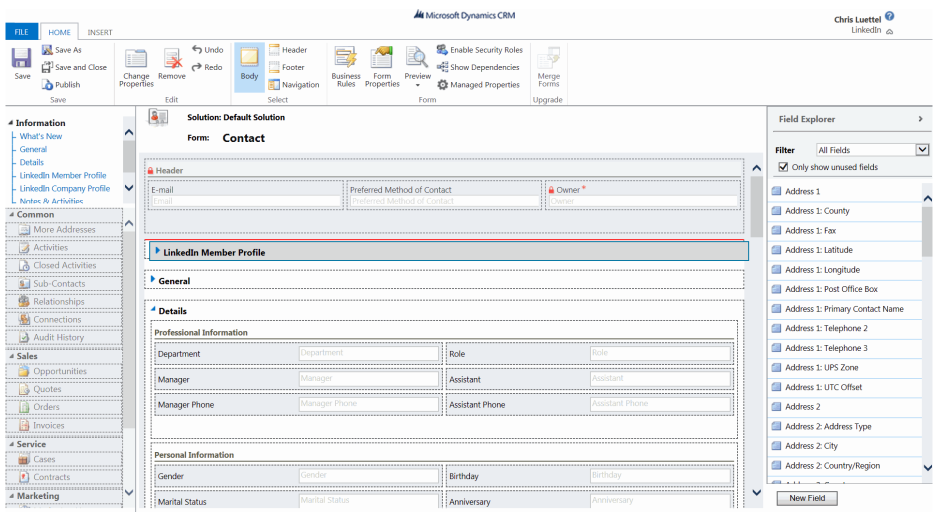


4. Scroll to the section you want to modify and click on it. This example will modify the "LinkedIn Member Profile." You can modify the section in the following ways:

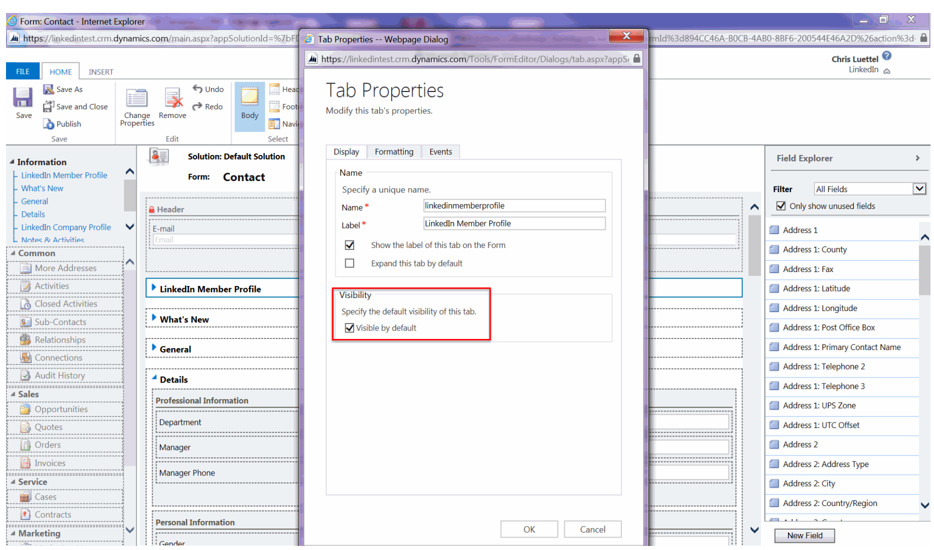
a. Collapse - Click on the triangle next to the section name to collapse the section by default.



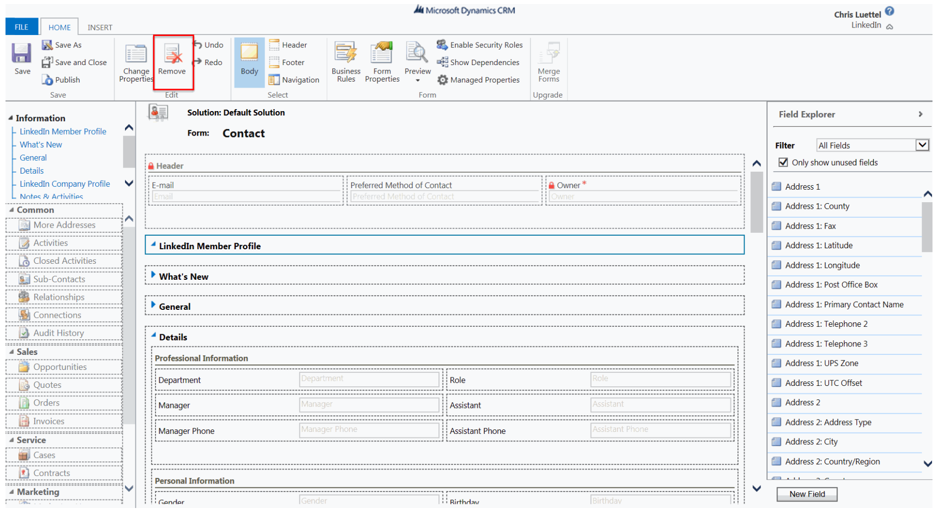
b. Move - Collapse the section to make moving easier. Drag the section to a new location and let go when you see a red line at the desired destination. Remember to un-collapse the section after moving.



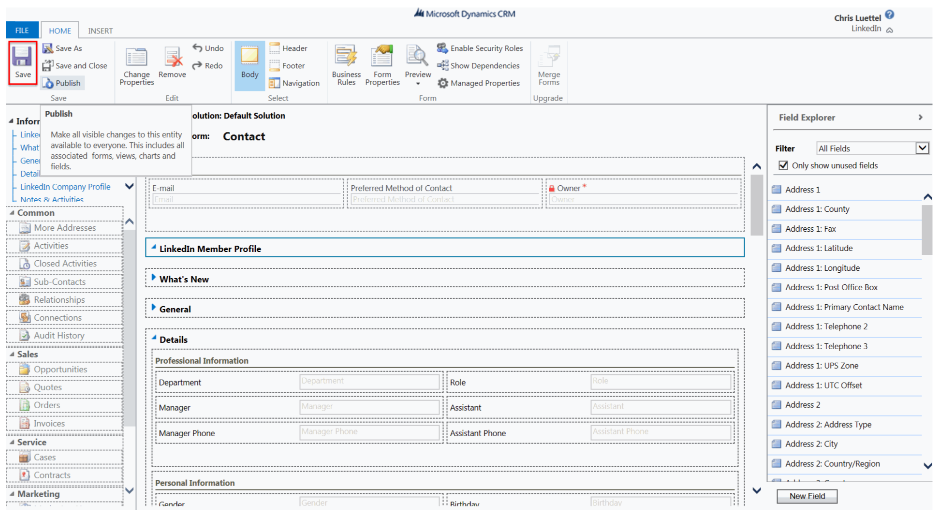
c. Hide - Double click on the section and in the dialog box, uncheck "Visible by default."



d. Remove - Click "Remove."



5. Click "Save" and "Publish" in
the top left to save your changes.



6. Repeat for other entities and forms if desired.

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