Contents

How to sync LinkedIn leads by using Dynamics 365 Connector for LinkedIn Lead Gen Forms

1/28/2020 • 2 minutes to read • Edit Online

Dynamics 365 Connector for LinkedIn Lead Gen Forms enables seamless synchronization of LinkedIn leads to Dynamics 365 apps. LinkedIn members can drive leads from Sponsored Content campaigns, based on a variety of calls to action. The LinkedIn Connector lets campaign managers sync the leads from LinkedIn's Lead Gen forms to a Dynamics 365 instance for further nurturing. If a lead is already known in a Dynamics 365 app, the data for that lead will be updated by using the information provided from LinkedIn; otherwise, a new lead record is created.

> **NOTE**
>
> You need a Dynamics 365 organization with the Sales app to use the LinkedIn Connector.

Quick start guide to install and use the connector

1. A system administrator or customizer installs the Connector for LinkedIn Lead Gen Forms from Microsoft AppSource. More information: Install Dynamics 365 Connector for LinkedIn Lead Gen Forms from AppSource

2. Optionally, a campaign manager defines the matching strategy between LinkedIn leads and Dynamics 365 Sales lead records, and analyzes individual forms and submissions. More information: Configure the matching strategy to update lead records from LinkedIn leads, Analyze individual LinkedIn Lead Gen forms and submissions.

3. A person filling the roles of both a campaign manager on LinkedIn and a salesperson in Dynamics 365 Sales authorizes the system to receive data from LinkedIn. More information: Connect Dynamics 365 Sales and LinkedIn

4. Optionally, a sales manager can review the lead performance in a dashboard. More information: Analyze leads and lead performance

See also

Install Dynamics 365 Connector for LinkedIn Lead Gen Forms from AppSource Establish a connection between Dynamics 365 Connector for LinkedIn Lead Gen Forms and LinkedIn Configure a matching strategy to update leads from LinkedIn Lead Gen ads Analyze leads and lead performance Microsoft Online Services Privacy Statement

Install Dynamics 365 Connector for LinkedIn Lead Gen Forms from AppSource

1/28/2020 • 2 minutes to read • Edit Online

To enable the synchronization of lead data from LinkedIn to Dynamics 365 apps, a system administrator needs to install the connector from Microsoft AppSource.

> **IMPORTANT**
> You can benefit from this connector when you use LinkedIn advertising campaigns that generate leads, such as Sponsored Content, Sponsored InMail, or Dynamic Ads.

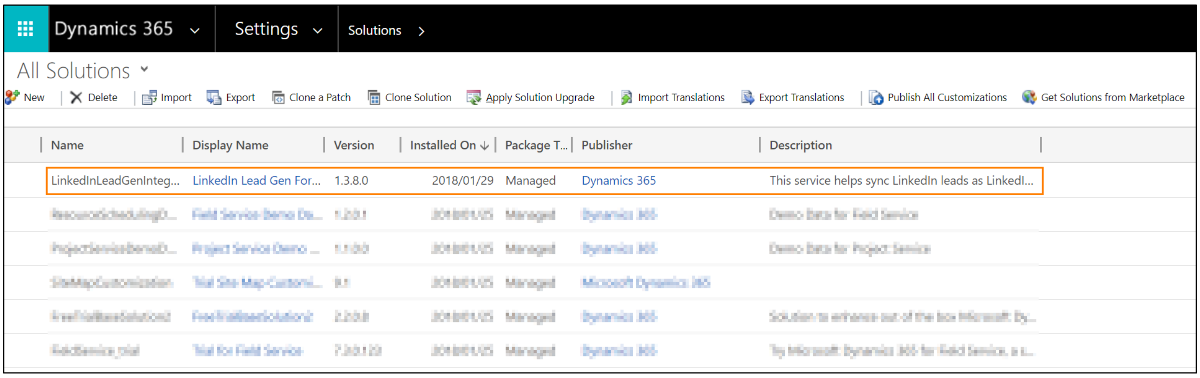
Prerequisites

- To install, update, or remove the solution, you'll need global admin permissions in Office 365, and be a system administrator or have a customizer security role in Dynamics 365 apps.
- To sync leads from LinkedIn and run campaigns on LinkedIn, you need access to a LinkedIn Advertising Account that can manage ads by using LinkedIn Campaign Manager.
  More information: LinkedIn: Campaign Manager Overview, LinkedIn: Creating an Account for Campaigns, LinkedIn: Adding, Editing, and Removing User Permissions on Advertising Accounts
- We recommend using the latest version of Microsoft Edge, Google Chrome, Mozilla Firefox, or Apple Safari.

Download and install the solution from AppSource

First, an administrator needs to install the solution.

1. Get the app package from Microsoft AppSource.
2. Sign in to your Dynamics 365 system admin account.
3. Select **Get** to start installing the solution.
4. Review and accept the disclaimer, required permissions, and service terms to install the connector. You need to be a global admin in this Office 365 tenant to authorize S2S inbound. More information about S2S: MSDN: Build web applications using Server-to-Server (S2S) authentication
   It takes a few minutes to install the solution. To monitor the status of the installation, or update or remove a managed solution, go to the Microsoft 365 admin center. More information: TechNet: Use the Microsoft 365 admin center to manage your subscription.
5. In Dynamics 365 Sales, go to **Settings** > **Customization** > **Solutions** and select **LinkedIn Lead Gen Forms Connector** to see the solution details.



6. The solution creates two new security roles, which you assign to users so they can work with LinkedIn Lead Gen Forms in Dynamics 365 apps. A third role, **LinkedIn Lead Gen S2S Inbound**, is an internal security role used by the solution to sync data.

- **LinkedIn Lead Gen Forms Administrator**—Users with this role can configure lead matching strategies, LinkedIn field mapping, and solution settings for the connector.
- **LinkedIn Lead Gen Forms Salesperson**—These users can authorize LinkedIn user profiles to sync data to Dynamics 365, and view details about the synced submissions.

Assign these security roles to users you want to provide access to the **LinkedIn Lead Gen** menu item. To learn how to assign a security role to users, see TechNet: Create users and assign security roles.

More information about installing or removing a solution: TechNet: Install or remove a preferred solution.

Update the solution

After installing the solution, you can visit the Microsoft 365 admin center to see if an update is available. You'll need global admin permissions to start the update process.

1. Go to the Microsoft 365 admin center and sign in with your global admin credentials.
2. Under **Admin centers**, select **Dynamics 365**.
3. In the **Dynamics 365 Administration Center**, select the **Instances** tab.
4. Under **Solutions**, click **Manage your solutions**.
5. Select **LinkedIn Lead Gen Forms** and click **Upgrade**.
6. Review the **Terms of service** and click **Upgrade**.

See also

Configure a matching strategy to update leads from LinkedIn Lead Gen ads
How to sync LinkedIn leads by using Dynamics 365 Connector for LinkedIn Lead Gen Forms

Configure a matching strategy to update leads from LinkedIn ads

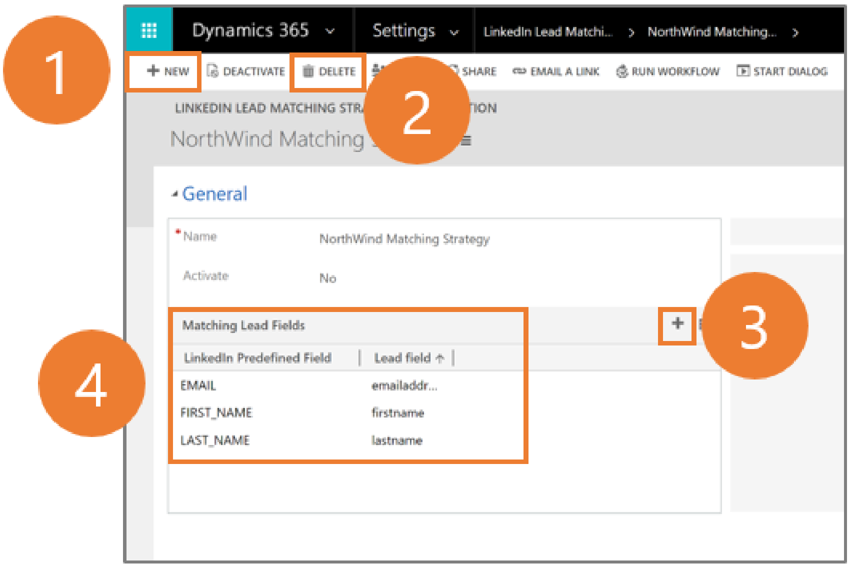
1/28/2020 • 3 minutes to read • Edit Online

When a new lead is synced from LinkedIn, the system can either update an existing lead record if the person is already known, or create a new lead if it's the first contact with this person. New LinkedIn leads appear as **LinkedIn Form Submissions** in Dynamics 365 apps. The information in LinkedIn form submissions consists of the answers given by LinkedIn members when they submitted the forms. To match existing leads in Dynamics 365 Sales with new LinkedIn form submission answers, users who have at least the LinkedIn Lead Gen Forms Connector Administrator security role can define a LinkedIn lead matching strategy in the Dynamics 365 Sales settings. A matching strategy maps the fields of a LinkedIn form submission to the record fields for a lead. By default, a matching strategy based on a lead's email address is activated.

A matching strategy applies to all LinkedIn leads in the same Dynamics 365 instance. If a matching strategy contains more than one field mapping, all mappings must match before an existing lead record is updated. We recommend maintaining simple matching strategies—for example, strategies based only on phone number or email address.

> **NOTE**
> If only a subset of the fields match, by default the system won't create a new lead from the form submission.
> To create new leads when the matching strategy fails, a system administrator or customizer can edit the **LinkedIn LeadGen Integration Configurations** entity and change the value for the **On Match fail** attribute from the default value **Ignore** to **Create new lead**. For quick access to this custom entity, consider adding it to the site map.

You need a **LinkedIn Lead Gen Forms Connector Administrator** security role to manage lead matching strategies.
More information: TechNet: Create users and assign security roles



1. Create a new matching strategy
2. Delete this matching strategy
3. Add more lead mapping fields

4. List of active lead mapping fields

Create a LinkedIn lead matching strategy

1. Go to **Settings** > **LinkedIn Lead Gen** > **Lead Matching Strategies**.
2. To create the matching strategy, select **New** +, enter a **Name**, and then select **Save**.
3. To add a LinkedIn field mapping record, select **Add** + and enter the name of the LinkedIn member field.
4. Select the **LinkedIn Field Mapping** record to add it to this matching strategy.

Activate a different LinkedIn lead matching strategy

1. Go to **Settings** > **LinkedIn Lead Gen** > **Lead Matching Strategies**.
2. In the list, select the matching strategy that you want to activate.
3. In the **Activate** menu in the matching strategy details, select **Yes**.

If another matching strategy is active, it will become deactivated.

> **TIP**
> It's a good practice to maintain a single strategy and update it if needed. However, you can maintain multiple matching strategies, but keep in mind that only one can be activated at a time.

Edit a LinkedIn lead matching strategy

1. Go to **Settings** > **LinkedIn Lead Gen** > **Lead Matching Strategies**.
2. In the list, select the matching strategy that you want to edit.
3. To add an additional LinkedIn field mapping record, select **Add** + and enter the name of the LinkedIn member field.
4. To remove a LinkedIn field mapping record, select **Delete** .

Delete a LinkedIn lead matching strategy

1. Go to **Settings** > **LinkedIn Lead Gen** > **Lead Matching Strategies**.
2. Select the check box for the lead matching strategy you want to delete.
3. Select **Delete** , and then confirm your deletion.

> **NOTE**
> You can't delete the activated lead matching strategy.

Edit the LinkedIn field mapping

By default, Dynamics 365 Sales maps fields from LinkedIn leads to corresponding fields of a lead record. As a system administrator or customizer, you can change the field mapping or create new mappings to support fields from custom questions on LinkedIn lead gen forms.

1. Go to **Settings** > **LinkedIn Lead Gen** > **Lead Field Mappings**.

2. Select the field mapping that you want to change and select **Edit**.

3. Change the mapping or rename the field mapping and select **Save** to apply your changes.

See also

How to sync LinkedIn leads by using Dynamics 365 Connector for LinkedIn Lead Gen Forms
Analyze leads and lead performance

Establish a connection between Dynamics 365 Connector for LinkedIn Lead Gen Forms and LinkedIn

1/28/2020 • 2 minutes to read • Edit Online

Before we can sync leads from LinkedIn campaign accounts to a Dynamics 365 organization, a LinkedIn member with access to LinkedIn Campaign Manager is required to authorize their LinkedIn accounts in Dynamics 365 apps. This user requires at least a **LinkedIn Lead Gen Forms Connector Salesperson** security role.

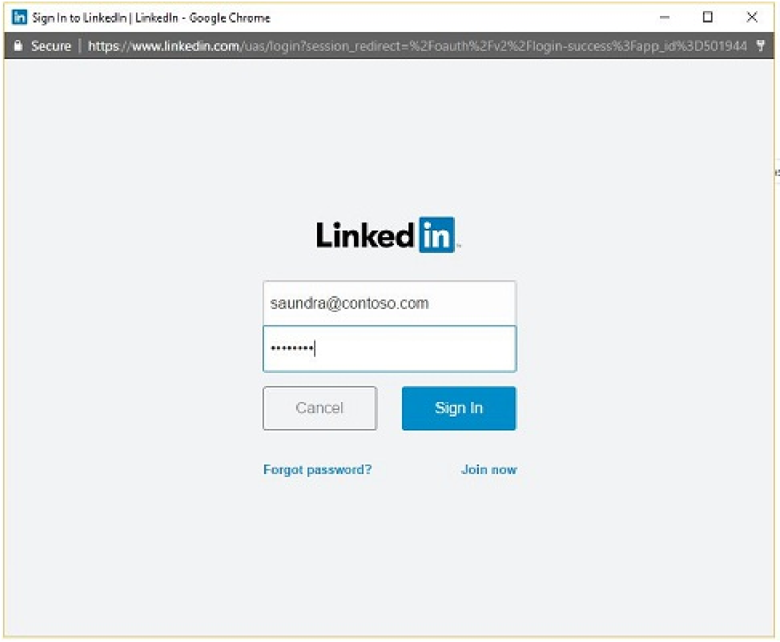
Authorize Dynamics 365 apps to sync data from LinkedIn Campaign Manager

1. Go to **Sales** > **LinkedIn Lead Gen Forms** > **LinkedIn User Profile**.

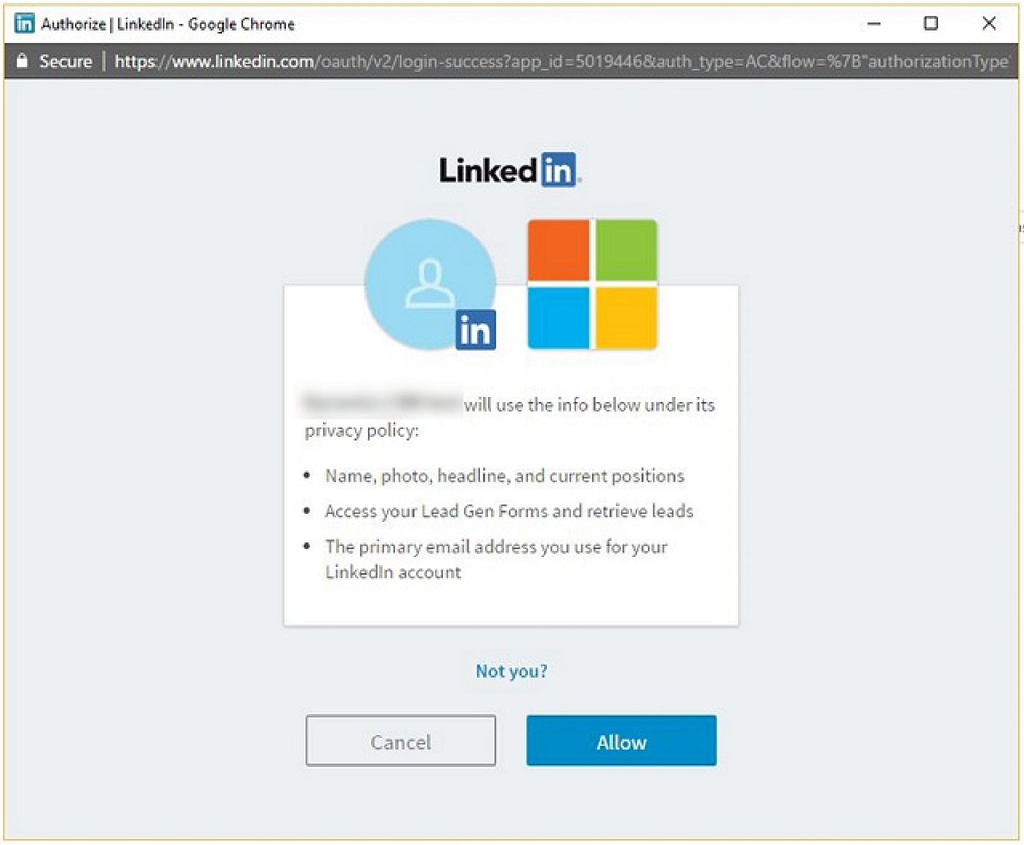
2. To add a new LinkedIn user profile record, select **New**, enter a **Name**, and then select **Save**.

3. To add LinkedIn accounts to this user profile, select **Authorize**.

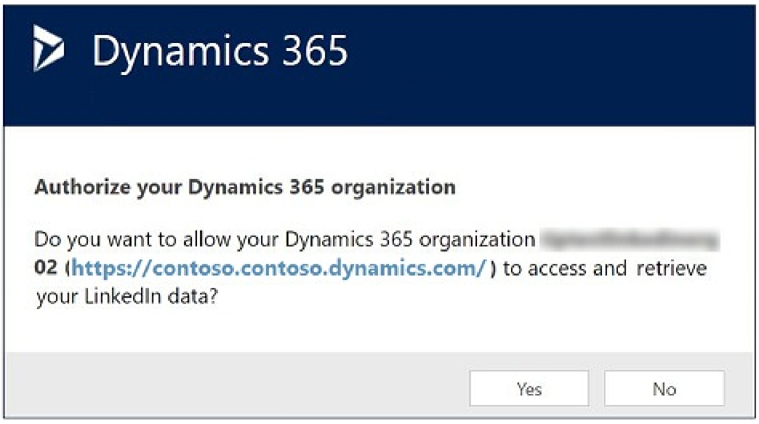
4. Enter the credentials for your LinkedIn profile, and then select **Sign In**.



5. In the permissions dialog box, select **Allow**.

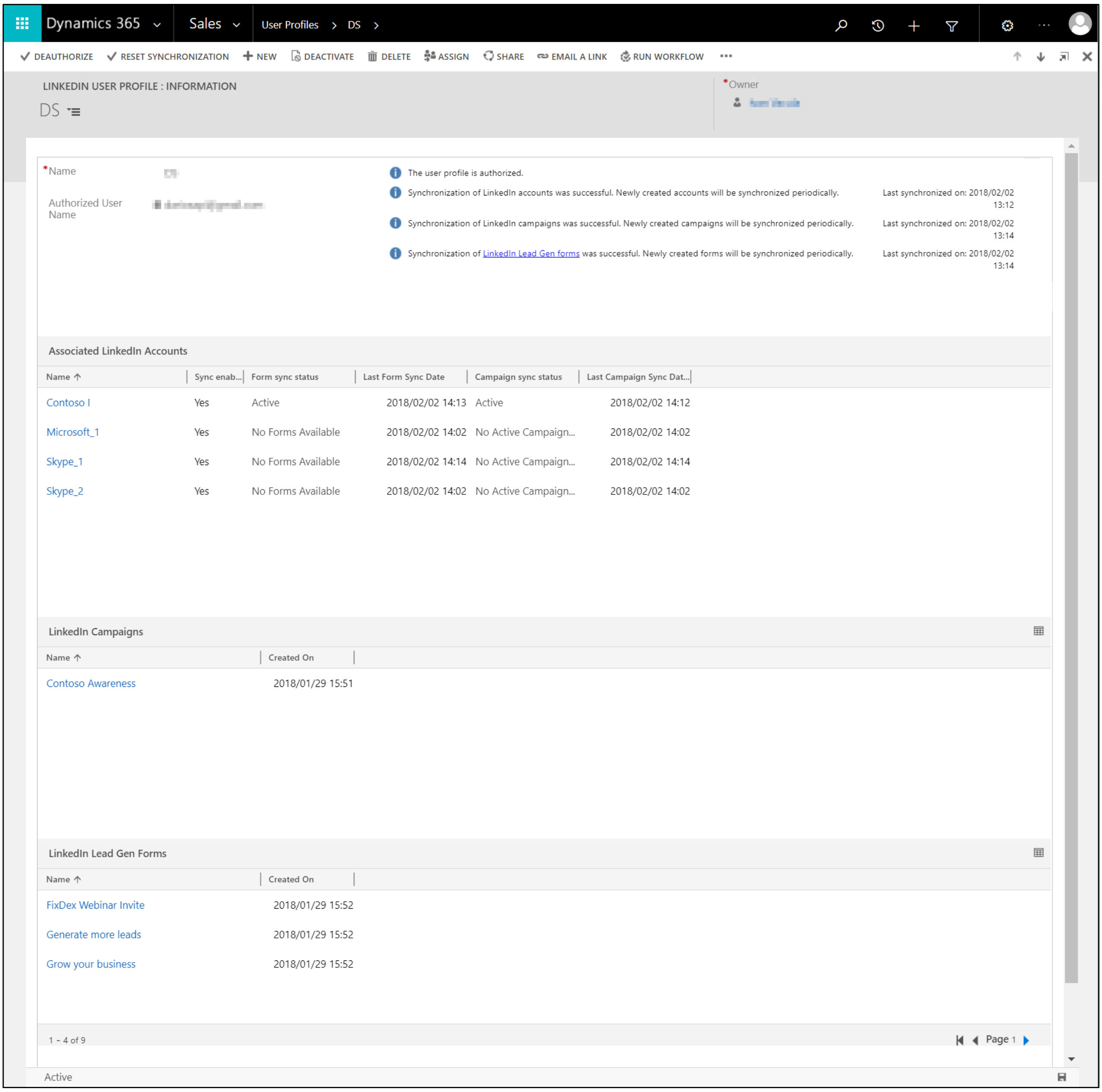


6. Check and confirm the organization you want to sync your LinkedIn data to.



After successful authorization, the LinkedIn accounts appear on the **LinkedIn User Profile** record. You can review the details of the LinkedIn accounts in the form. It might take a few seconds to get the accounts; try refreshing the view if you don't see them.

LinkedIn form submissions are now synced automatically to the destination system. You'll be able to see the data in Dynamics 365 apps as soon as the sync is complete, which might take a few minutes.



See the sync status for LinkedIn data

When you go to **Sales** > **LinkedIn Lead Gen** > **Sync Status**, you'll find an aggregated overview about the data that was pulled from all LinkedIn user profiles to Dynamics 365 Sales. At a glance, you can see when the most recent synchronization took place and find out how many leads were created or updated in total.

If you want to synchronize the LinkedIn data retroactively after migrating to a newly created Dynamics 365 organization, you can trigger an optional, on-demand sync of all data from LinkedIn by selecting **Reset Synchronization**. This will pull all lead data from LinkedIn again. We don't recommend this action if you already have a working synchronization set up because the matching will fail for all leads that were matched earlier. Additionally, it can take a long time to complete as it's syncing all leads again and thus shouldn't be used frequently.

See also

How to sync LinkedIn leads by using Dynamics 365 Connector for LinkedIn Lead Gen Forms
Install Dynamics 365 Connector for LinkedIn Lead Gen Forms from AppSource

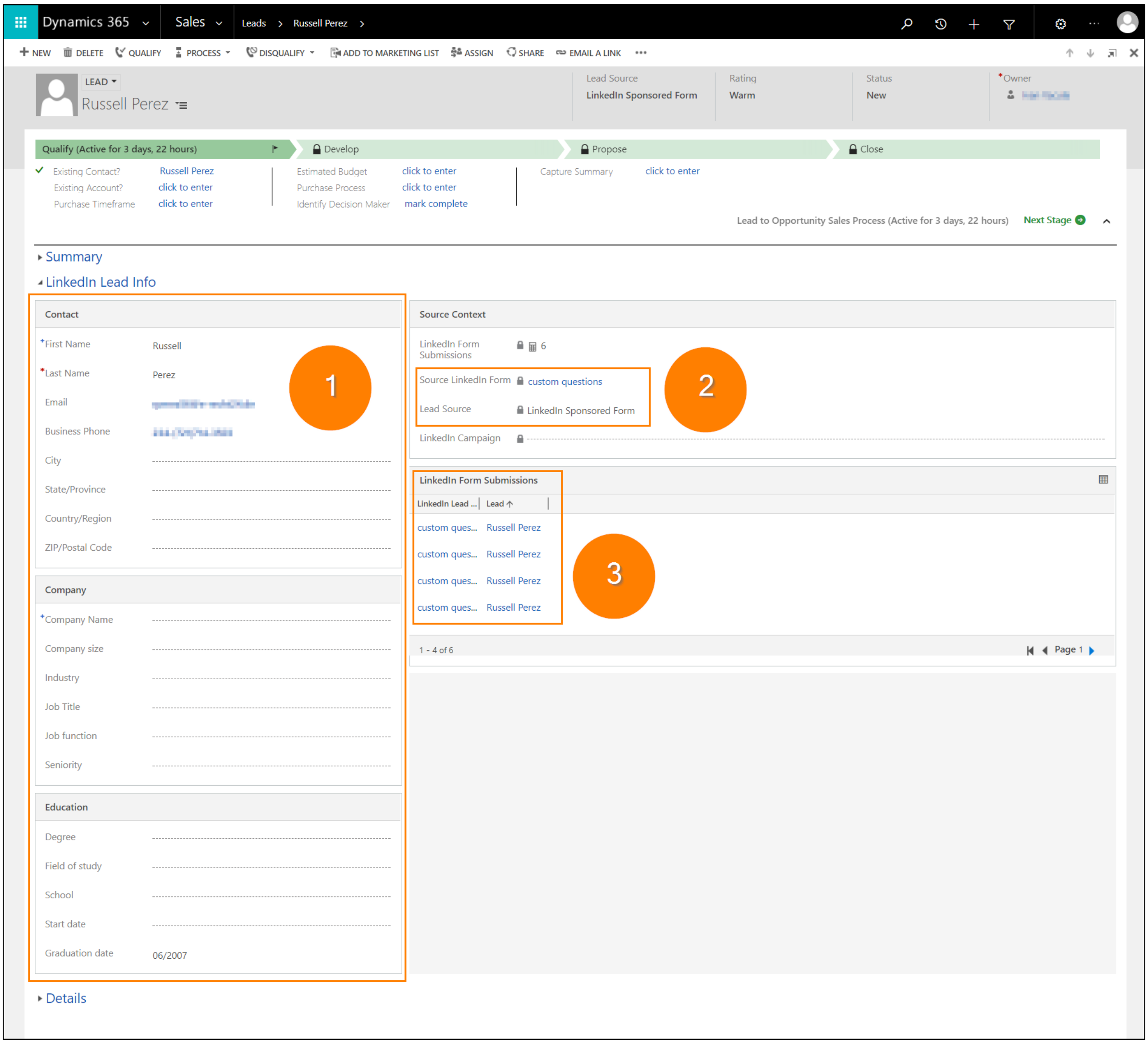
Analyze leads and lead performance

1/28/2020 • 2 minutes to read • Edit Online

When a LinkedIn lead matches a lead record in Dynamics 365 Sales, the lead record is updated with additional information. In addition to the updates of individual lead records, charts on dashboards can represent the performance of a marketing campaign on LinkedIn.

See the details of a lead

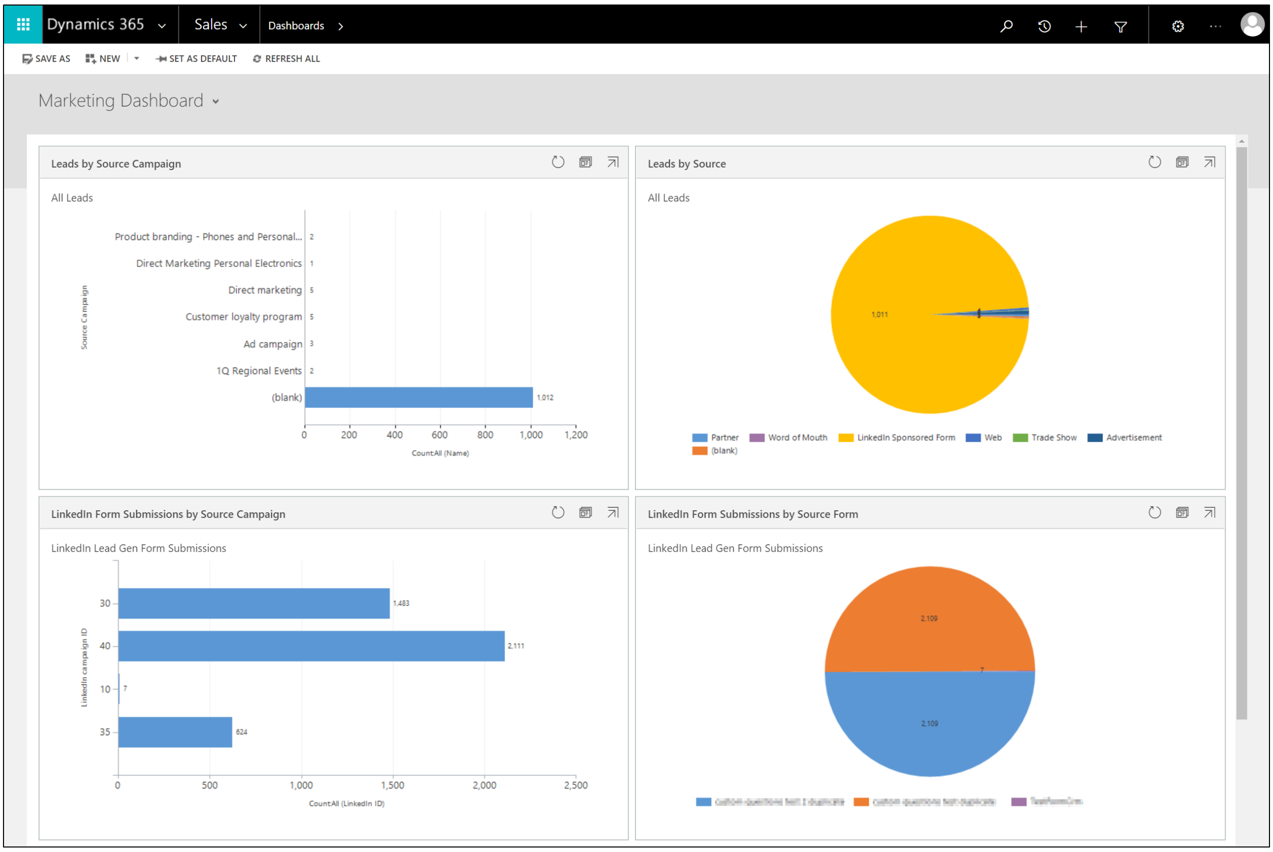
To see the details of a lead record, go to **Sales** > **Leads** and select the lead record from the list. If the lead was created by the connector, the lead source is **LinkedIn Sponsored Content**. If an existing lead record was updated, the system updates the lead field values by using the information submitted by the lead on LinkedIn. More information about creating or editing a lead: [Create or edit a lead](#).



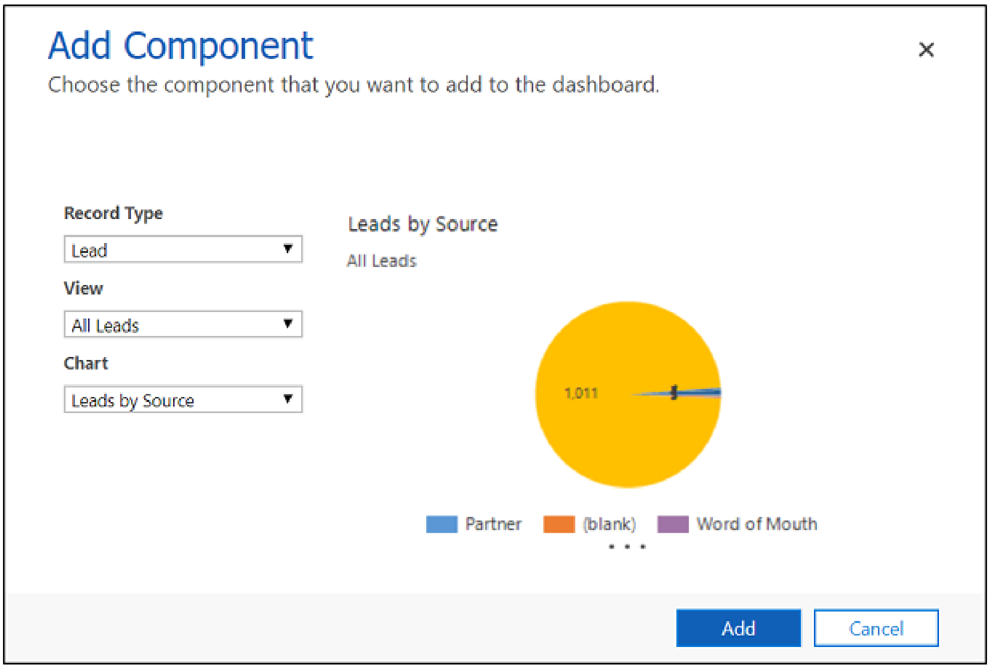
1. Information about the lead from LinkedIn
2. Source from which the lead originated and the LinkedIn campaign related to this lead
3. Forms submitted by this lead

Review the aggregated lead performance

Work with a dashboard containing charts about the source of new leads, or create new dashboards by using the charts that matter the most to get your reporting completed.



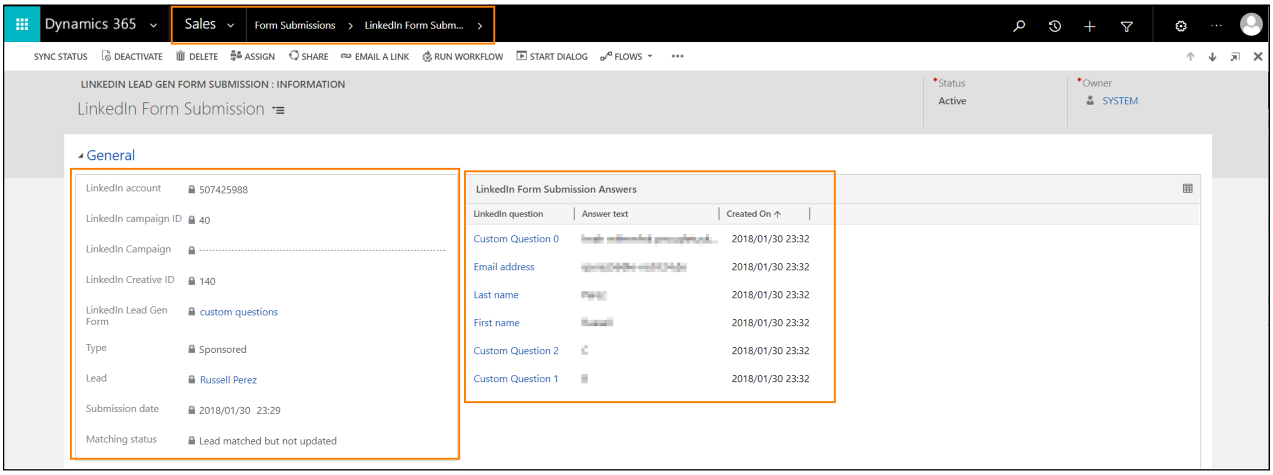
When you create your own dashboard, consider adding a chart for the record type **LinkedIn Form Submissions** to see how your campaigns perform compared to each other. Or, you can create a **Leads by Source** chart for the record type **Lead**. Give it a try!



More information about building custom dashboards: Create or customize dashboards and Manage dashboard components.

Analyze individual LinkedIn Lead Gen forms and submissions

To see all form submissions, go to **Sales** > **LinkedIn Lead Gen** > **LinkedIn Form Submissions**. You can drill down to individual submissions to see the details of the lead and the information provided by the LinkedIn members when they answered the underlying LinkedIn Lead Gen form.



Establish and grow relationships with LinkedIn Sales Navigator

The LinkedIn Sales Navigator for Microsoft Dynamics is an additional integration with separate requirements which might be a useful addition if your organization is already using LinkedIn Sales Navigator.

To find out more about the capabilities or request a demo, head over to Sales Navigator from LinkedIn Sales Solutions.

Learn how to install the solution on the LinkedIn Sales Navigator help center.

See also

Establish a connection between Dynamics 365Connector for LinkedIn Lead Gen Forms and LinkedIn
Configure a matching strategy to update leads from LinkedIn Lead Gen ads

Integrate LinkedIn Sales Navigator solutions for Dynamics 365 Sales

7/9/2020 • 2 minutes to read • Edit Online

Digital transformation is real. Across every industry vertical, companies are rethinking their business processes and entire segments are reorganizing. Enhance key application scenarios by connecting the system of record with the LinkedIn data graph and insights. Build custom applications powered by LinkedIn Sales Navigator intelligence, enhancing business processes with data about people, organizations, and relationships.

Unified Interface apps: Sales Navigator Controls for the unified interface

Two flavors of LinkedIn Sales Navigator controls are available and can be placed on any desktop Unified Interface application form. You can configure your forms to show more than one control at the same time.

The **LinkedIn Sales Navigator Lead** control shows information about a LinkedIn member profile. This control has the following sections, which you can choose to show or hide:

- **Top Card**: shows information about the person like name, headline, and more. Additionally, it provides capabilities to message or save the person as a lead in Sales Navigator.
- **News (Icebreakers)**: shows the person's highlights, activities, conversation starters, and more.
- **Connections (Get Introduced)**: shows the mutual connections and allows for a warm introduction to the person.
- **Related Leads**: shows potential Sales Navigator leads who are similar to the target person and might represent the relevant stakeholders around them. On a sales scenario, this insight is crucial to identify the potential decision-makers for a deal.

The **LinkedIn Sales Navigator Account** control shows information about a LinkedIn company profile. This control has four modules, which you can choose to show or hide:

- **Top Card**: shows information about the company like company name, industry, location, and more. Additionally, provides capabilities to view the related account and save it in Sales Navigator.
- **News**: shows the latest news of this company.
- **Connections**: shows relevant connections for this company that can establish a first contact.
- **Recommended Leads**: shows the recommended potential leads in this company that may be opportunities open for the next deal.

Both controls also provide an alternate version, which takes a lookup (entity reference) attribute instead of the attributes described above.

- **LinkedIn Sales Navigator Lead lookup** control: the name of the referenced entity is used as the member's first name and last name. The string is separated by white spaces and the first component is considered the first name while the remaining components are considered last names.
- **LinkedIn Sales Navigator Account lookup** control: the name of the referenced entity is used as the company name.

The control binds to a field that is used to match the record with LinkedIn member profile or company account. Once a match is found, subsequent loads are done through the record GUID association. If the control does not load the correct profile on the first match, users can resolve the issue by finding the correct match with the provided search interface.

Dynamics CRM 2016 and Dynamics 365 apps: LinkedIn Sales Navigator for Microsoft Dynamics

Two LinkedIn Sales Navigator widgets are available to display on forms in Dynamics 365. Please refer to the link below for more information and detailed steps for installing and setting up the solution.

> **NOTE**
>
> Before April 2019, there were two separate solutions on AppSource. Now there is a single solution included out of box, however there is still some required setup to configure LinkedIn's CRM sync.

Set up the LinkedIn Sales Navigator for Microsoft Dynamics integration

See also

Install and enable LinkedIn Sales Navigator
Customize forms to show Sales Navigator controls
Work with Sales Navigator controls on forms

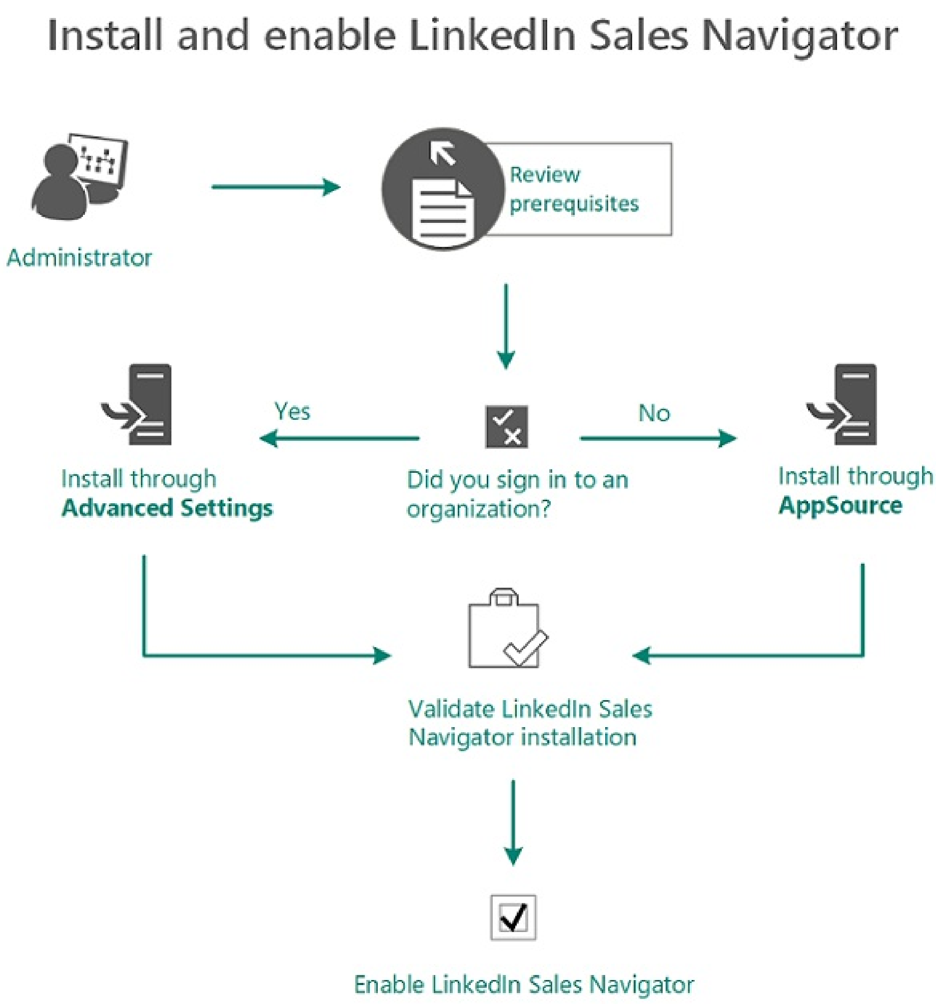
Install and enable LinkedIn Sales Navigator

7/9/2020 • 4 minutes to read • Edit Online

As an administrator, you can install and enable the LinkedIn Sales Navigator for your organization in one of two ways, depending on your requirements:

- **Advanced Settings**: Use the **Advanced Settings** option to install and enable LinkedIn Sales Navigator for the organization that you're already signed in to. More information: Install through Advanced Settings
- **AppSource**: Use the **LinkedIn Sales Navigator for Dynamics 365** AppSource page to install and enable LinkedIn Sales Navigator if you're managing multiple organizations and want to enable it in an organization. To learn more, see Install through the AppSource page.

The following diagram illustrates the steps to install and enable LinkedIn Sales Navigator:



1. Review prerequisites.
2. Install LinkedIn Sales Navigator:
   - Through Advanced Settings.
   - Through the AppSource page.
3. Validate the installation.
4. Enable LinkedIn Sales Navigator.

Review prerequisites

Review the following prerequisites to install and enable LinkedIn Sales Navigator:

- You have a System Administrator security role in Dynamics 365.
- You have a Microsoft Relationship Sales subscription for Dynamics 365.

  or

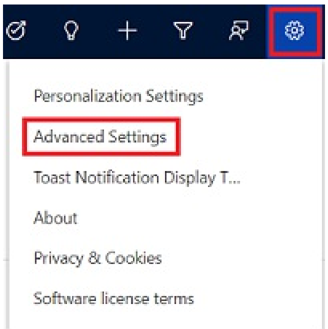
  You'll need to sign up your team for LinkedIn Sales Navigator Team or LinkedIn Sales Navigator Enterprise.

> **NOTE**
>
> We recommend having a Microsoft Relationship Sales solution Plus license. To learn more, see the **Dynamics 365 Sales** section from the Microsoft Dynamics 365 Licensing Guide.

- You'll need to enable JavaScript in your browser.
- You'll need to disable your pop-up blocker for the Dynamics 365 domain.

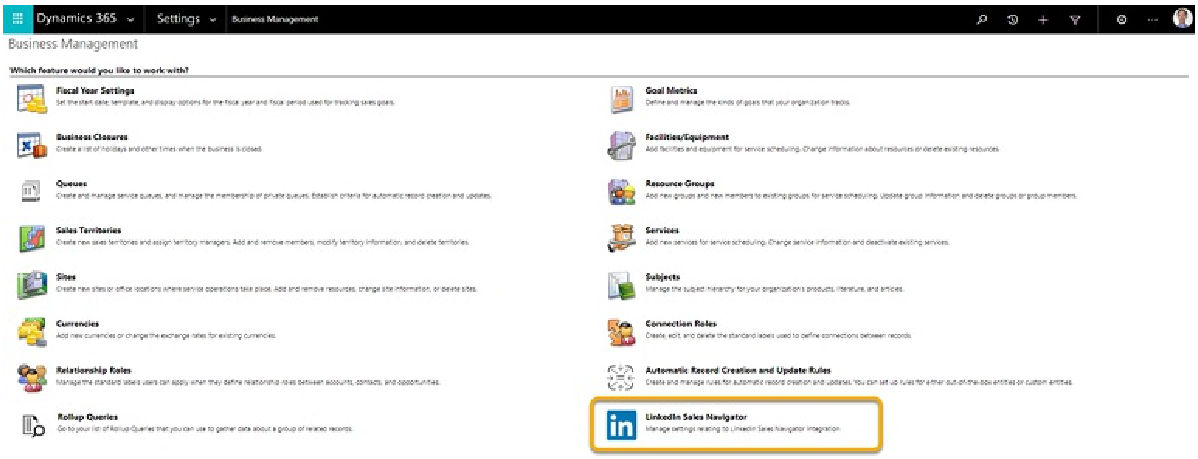
Install through Advanced Settings

1. In your app, select **Settings** , and then select **Advanced Settings**.



   The **Business Management settings** page opens in a new browser tab.

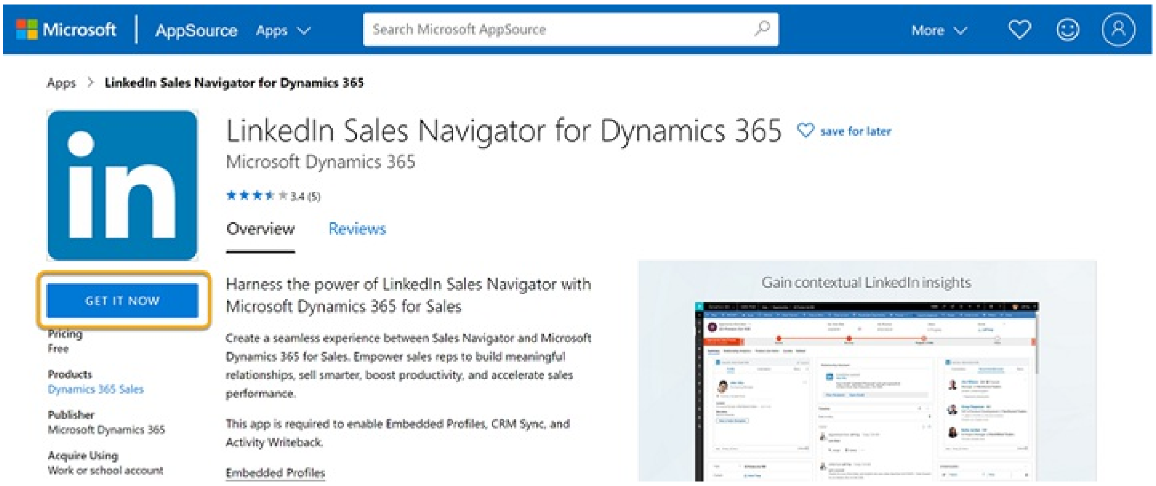
2. Select **LinkedIn Sales Navigator**.



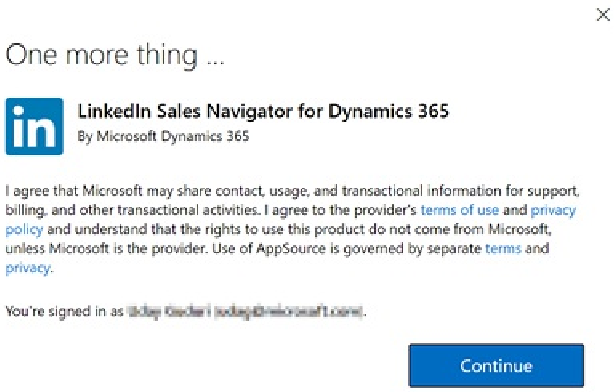
3. On the new **Installation** tab that opens, select **Continue** to install the required solutions. It takes a few minutes to complete the installation.
4. Verify that the installation is complete by following the steps in Validate the installation.

Install through the AppSource page

1. Go to the LinkedIn Sales Navigator for Dynamics 365 AppSource page, and then select **GET IT NOW**.

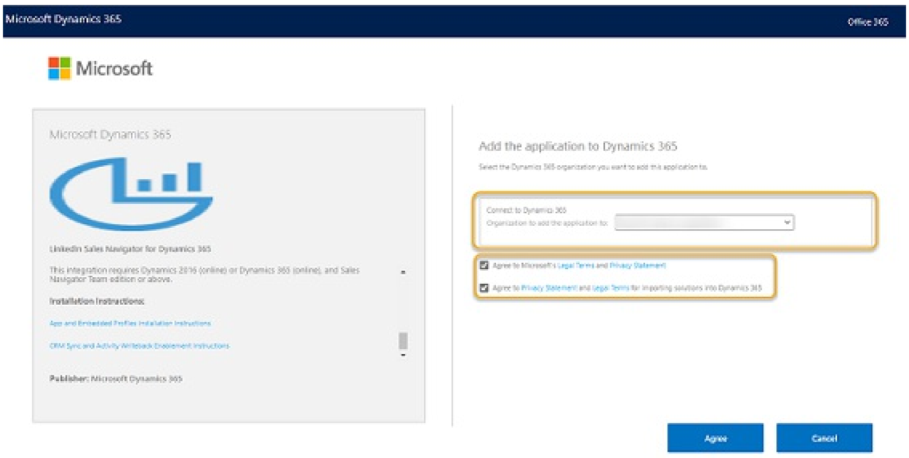


2. Read the terms and conditions, and then select **Continue**.

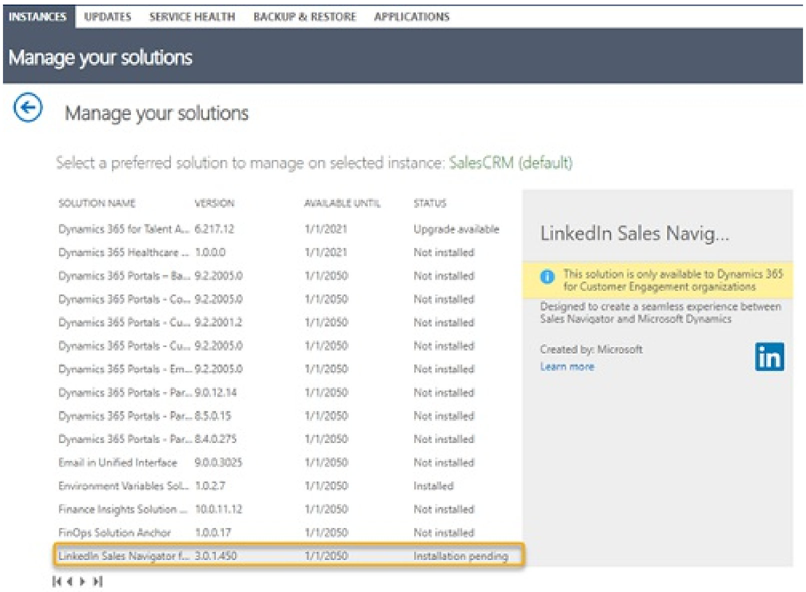


The Dynamics 365 marketplace opens.

3. Choose the organization from the **Organization to add the application to** list, select the check boxes for Microsoft and Dynamics 365 legal terms and privacy statements, and then select **Agree**.



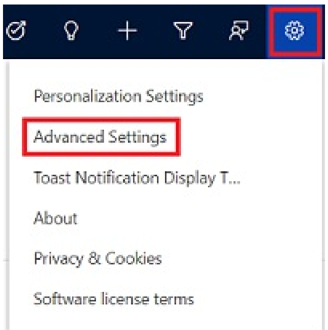
4. On the **Manage your solutions** page, verify the status of the installation.



5. Verify that the installation is complete by following the steps in Validate the installation.

Validate the installation

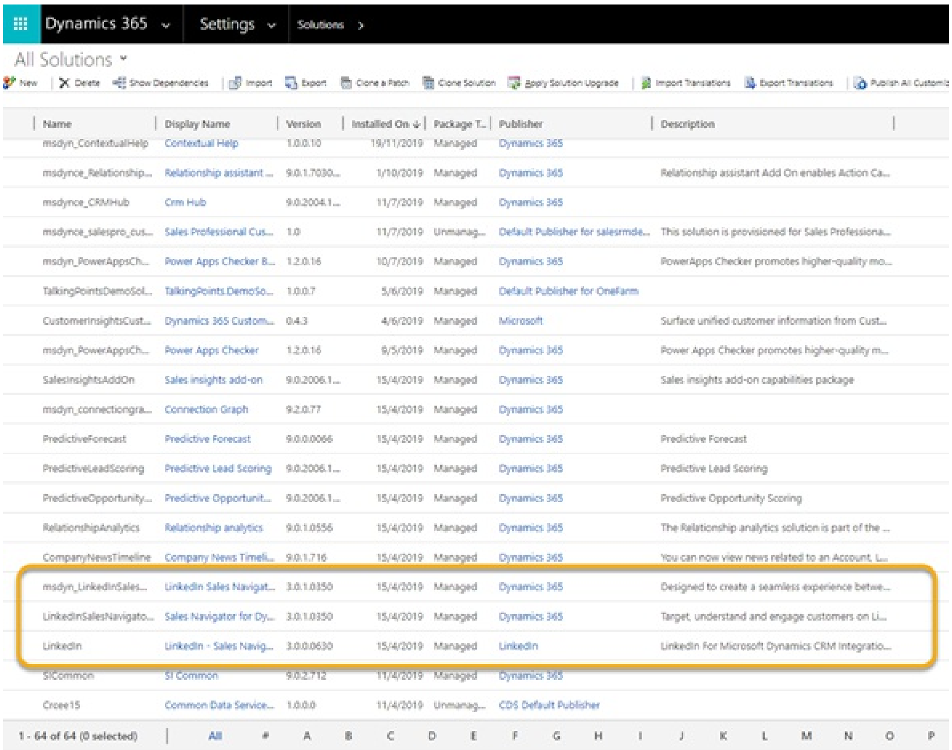
1. In your app, select **Settings** , and then select **Advanced Settings**.



2. Go to **Settings** > **Customizations** > **Solutions**.

3. Verify that the following solutions are installed in your organization.

- LinkedInSalesNavigatorControlsForUnifiedClient
- LinkedIn
- msdyn_LinkedInSalesNavigatorAnchor

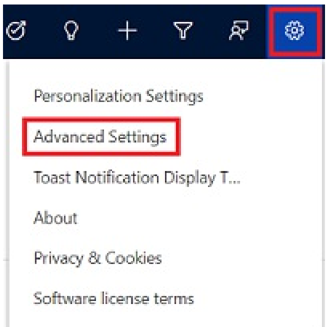


4. When the installation is completed, select **Go to Configuration** and follow the steps to [Enable LinkedIn Sales Navigator](#).

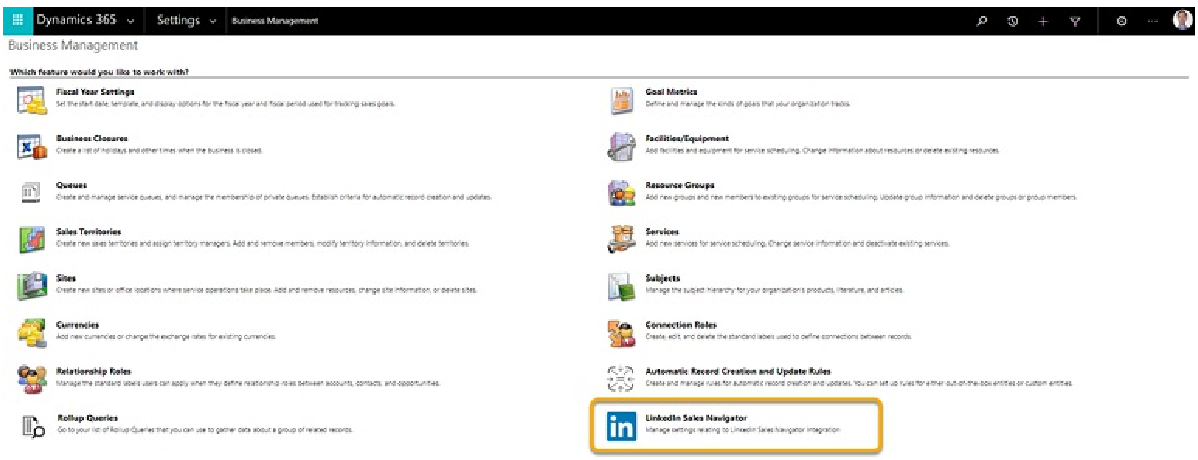
Enable LinkedIn Sales Navigator

Use this procedure to enable default controls for LinkedIn Sales Navigator content. The Sales Navigator controls will appear on Account, Contact, Lead, and Opportunity pages by default. You can also customize other forms and entities to show Sales Navigator controls.

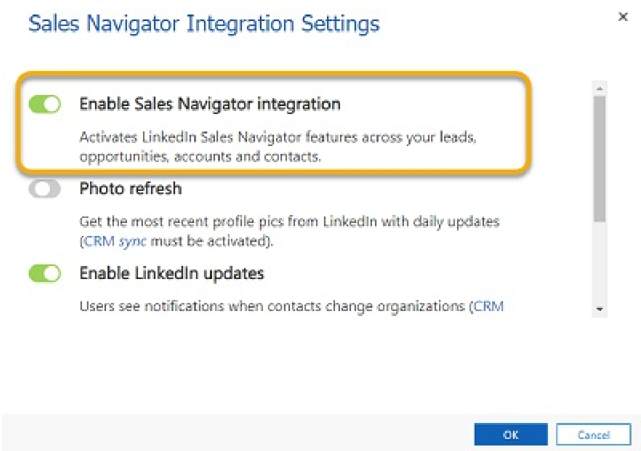
1. In your app, select **Settings** , and then select **Advanced Settings**.



2. On the **Business Management settings** page, select **LinkedIn Sales Navigator**.



3. Turn on the **Enable Sales Navigator integration** toggle.



4. Select **OK**.

Enable CRM sync and activity writeback

By enabling the CRM sync and activity writeback, the Sales Navigator matches the Accounts, Leads, and Contacts in Dynamics 365 Sales. It also saves information you create in Sales Navigator directly in your Dynamics 365 Sales, including InMails and Messages.

To enable the CRM sync and activity writeback, follow the process as defined in CRM Sync & Activity Writeback for Dynamics 365.

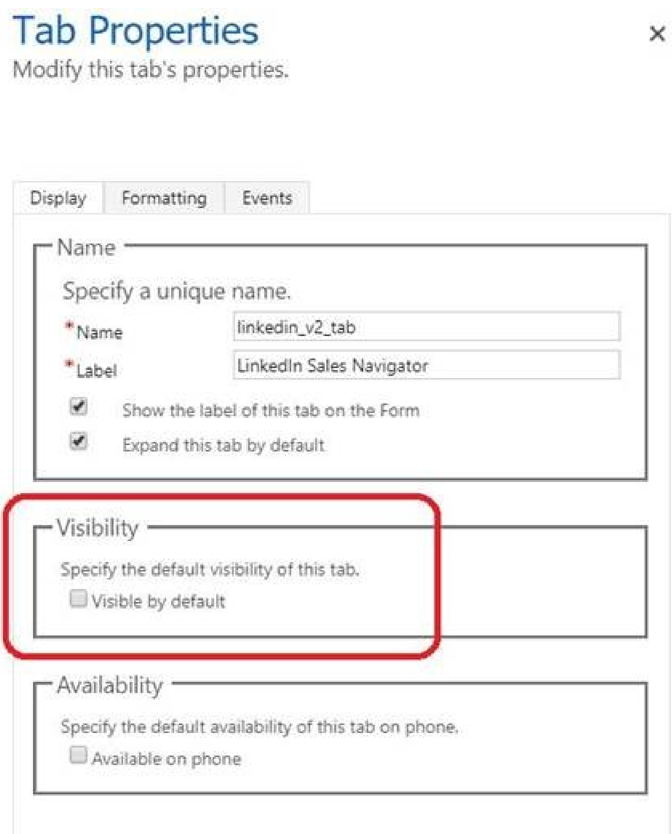
Existing orgs that got updated with April 19 features

In the April 19 release, we introduced changes to how the Sales Navigator controls are enabled. Here are a few things to consider if you don't plan to enable the integration:

- Three solutions related to the LinkedIn integration appear in the **All Solutions** view in **Settings** > **Customizations** > **Solutions**. Although these solutions are preinstalled, the functionality and data transfer between the two systems will be disabled unless you enable LinkedIn Sales Navigator. Additionally, **CRM Sync** needs to be explicitly enabled on LinkedIn Sales Navigator Admin Settings page.

msdyn_LinkedInSalesN...	LinkedIn Sales Navigat...	3.0.0.0680	4/6/2019	Managed	Dynamics 365	Designed to create a seamless experience betw...
LinkedInSalesNavigato...	Sales Navigator for D...	3.0.0.0680	4/6/2019	Managed	Dynamics 365	Target, understand and engage customers on Li...
LinkedIn	LinkedIn - Sales Navig...	3.0.0.0630	4/6/2019	Managed	LinkedIn	LinkedIn For Microsoft Dynamics CRM Integrati...

- System customizers will see the new LinkedIn controls in Account, Contact, Lead, and Opportunity form editors. However, the visibility for these controls is turned off by default and users won't be able to see them on forms unless the feature is enabled by a system administrator. Customizers can remove these controls from pages as they'd remove any control that they consider too distracting.



- While using **Advanced Find**, users see the new entities introduced by these solutions (InMails, Messages, and Smart Links) even if the integration wasn't enabled. This is the intended behavior; users can ignore these entities if they aren't actively using LinkedIn Sales Navigator.

See also

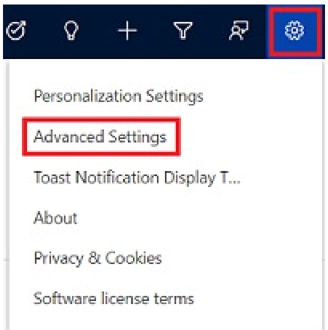
[Overview for LinkedIn Sales Navigator solutions](#)
[Customize forms to show Sales Navigator controls](#)
[Work with Sales Navigator controls on forms](#)
[See profile pictures](#)

Disable LinkedIn Sales Navigator

6/24/2020 • 2 minutes to read • Edit Online

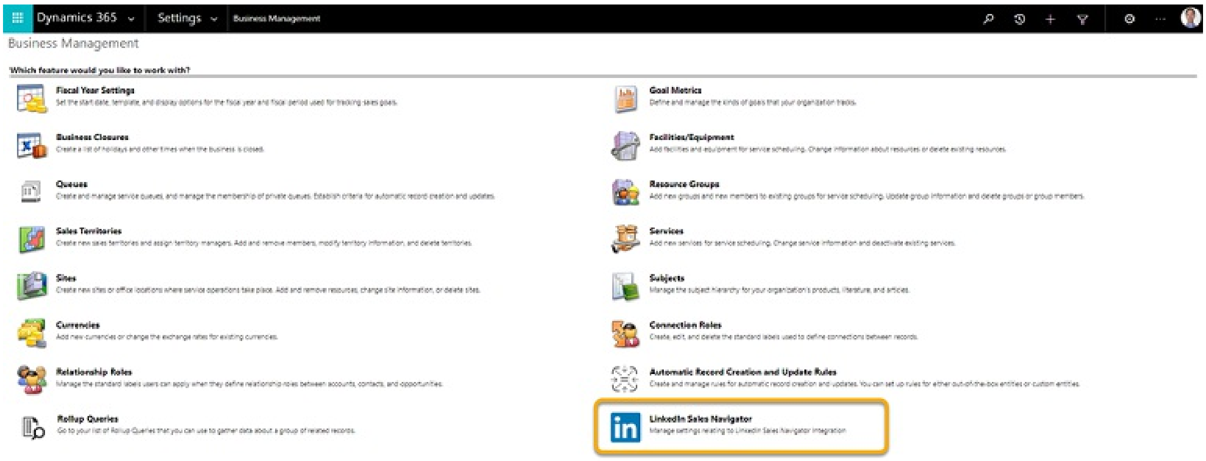
Disabling the integration will stop showing the Sales Navigator controls.

1. In your app, select **Settings**, and then select **Advanced Settings**.

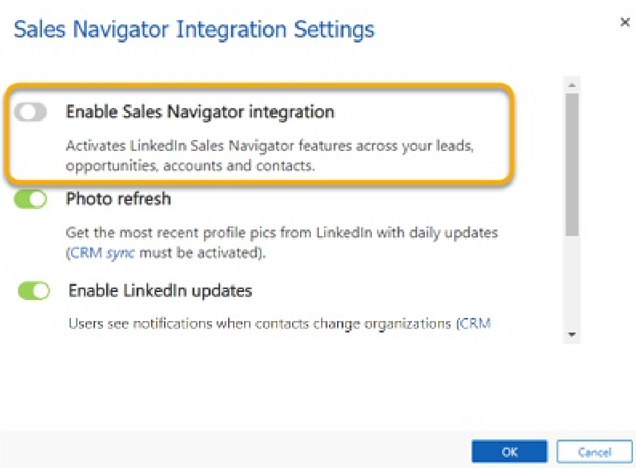


   The **Business Management settings** page opens in a new browser tab.

2. Select **LinkedIn Sales Navigator**.



3. Turn off the **Enable Sales Navigator integration** toggle.



4. Select **OK**.

See also

Install and enable LinkedIn Sales Navigator

Uninstall LinkedIn Sales Navigator

Uninstall LinkedIn Sales Navigator

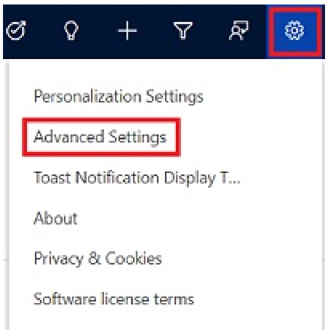
7/1/2020 • 2 minutes to read • Edit Online

You can uninstall LinkedIn Sales Navigator if you don't want to use it in your organization. To uninstall, you must delete the following solutions in the following order:

1. LinkedInSalesNavigatorControlsForUnifiedClient
2. LinkedIn
3. msdyn_LinkedInSalesNavigatorAnchor

To uninstall LinkedIn Sales Navigator

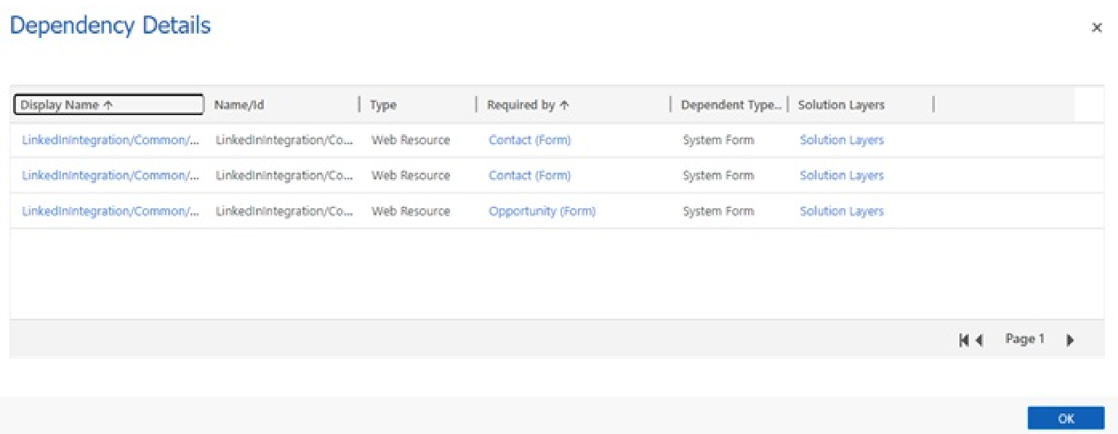
1. In your app, select **Settings** , and then select **Advanced Settings**.



2. Go to **Settings** > **Customizations** > **Solutions**.

3. Select the **LinkedInSalesNavigatorControlsForUnifiedClient** solution.

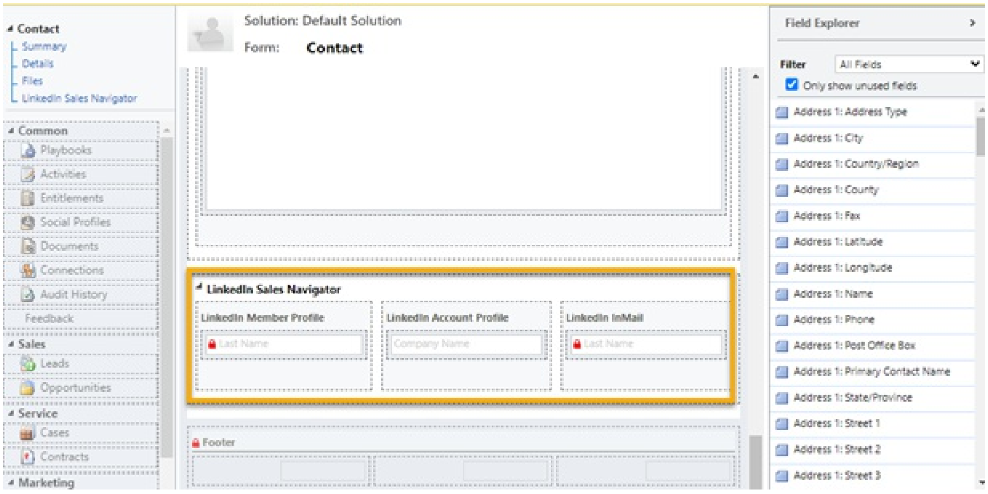
4. Select **Show Dependencies** to check whether there are any dependencies for the solution. If dependencies exist, you must remove them before you delete the solution. The following image shows an example of dependency details:



These dependencies exist because LinkedIn controls are included in Account, Contact, Lead, or Opportunity forms. To remove the dependencies, follow these steps:

a. Open the form in the form editor.

b. Select the **LinkedIn Sales Navigator** section, and then select **Remove**.



c. Save and publish the form.

d. Repeat steps a through c for any other dependencies.

5. After you've removed the all the dependencies, select **Delete**.

6. Select **OK** in the confirmation message that appears.

7. Repeat steps 3 through 6 for the **LinkedIn** and **msdyn_LinkedInSalesNavigatorAnchor** solutions.

See also

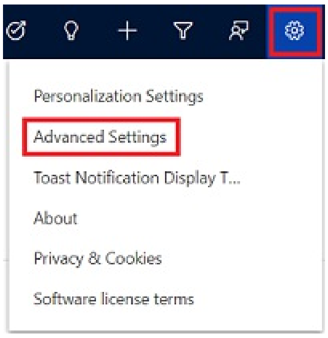
[Install and enable LinkedIn Sales Navigator]
[Disable LinkedIn Sales Navigator]

See profile pictures for matched leads and contacts

6/24/2020 • 2 minutes to read • Edit Online

For leads and contacts that are matched to a LinkedIn member profile, the system can show profile pictures from LinkedIn.

1. In your app, select the **Settings** icon, and then select **Advanced Settings**.

   The **Business Management settings** page opens in a new browser tab.

2. Select **LinkedIn Sales Navigator**.

3. Select the **Photo refresh** control.

4. Select **Ok** to enable the display of profile pictures.

To enable the display of profile image in the contact or lead form, you must enable **Sales Navigator CRM sync** in the LinkedIn Sales Navigator settings. For more information how to enable CRM sync, see Integration between Sales Navigator and your CRM.

> **NOTE**
>
> - Only profile pictures for matched leads and contacts can be captured from LinkedIn.
> - The profile picture from Linkedin for a matched contact or lead is only shown in the out-of-the-box Contact or Lead form in the apps built on the Unified Interface.

See also

Install and enable LinkedIn Sales Navigator

Data validation

7/9/2020 • 2 minutes to read • Edit Online

This article describes the data validation capabilities of the LinkedIn Sales Navigator solution for Dynamics 365 Sales that helps you keep the organizational structure of your matched contacts up to date. It uses the LinkedIn information to validate the contact records in Dynamics 365 Sales and enables you to check back on pending opportunities or have a useful icebreaker when getting in touch with a contact.

Prerequisites

To ensure timely updates if a matched contact changes the company, the following prerequisites must be met:

- The CRM sync capability in LinkedIn Sales Navigator is activated by an administrator. To learn more, see CRM Sync & Activity Writeback for Dynamics 365.
- The data validation LinkedIn in Sales Navigator is enabled by an administrator. To learn more, see Sales Navigator Data Validation for Dynamics 365.
- You must have a Microsoft Relationship Sales solution Plus license. To learn more, see the **Dynamics 365 Sales** section from the Microsoft Dynamics 365 Licensing Guide.
- The data validation settings are turned on in **Settings** > **Business Management** > **Sales Navigator Integration Settings**. When the data validation feature is turned on for the first time, you'll get updates about the company change status for the past two years. Afterwards, the updates come are sent to the system on daily basis, every 24 hours.

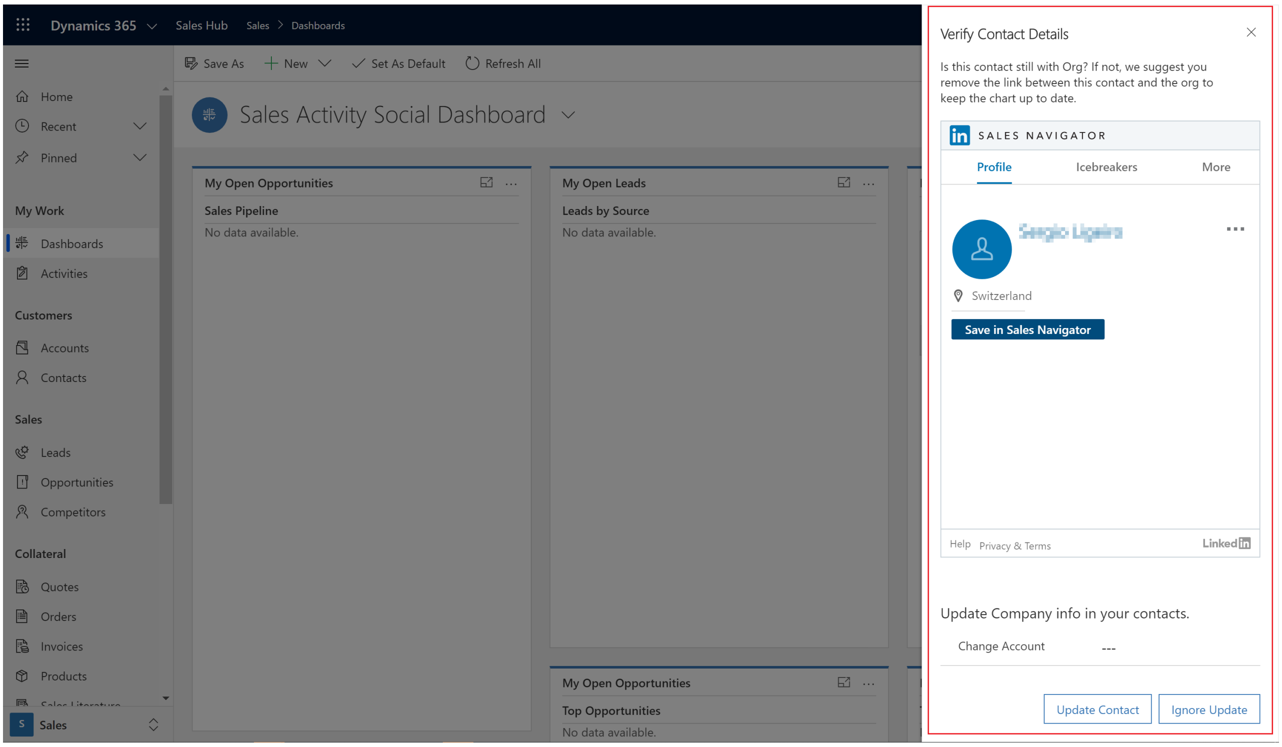
Access the data validation capabilities Dynamics 365 Sales

There are several ways to find out if a contact's company has changed.

- From the org chart on an Account record: A red dot next to a contact's name in the org chart indicates that their company has changed since you built the org chart.
- From the **Relationship Assistant** card in the **Sales Activity Social Dashboard**. To turn on the Relationship Assistant card, go to **Settings** > **Sales Insights** > **Insight cards**
- From the **Opportunities** > **All Opportunities at Risk - Contact left** view in Dynamics 365 Sales.
- From the **Contacts** > **All Contacts Not at Company** view in Dynamics 365 Sales.

Update the contact details

To update the org chart for a specific contact, perform the following steps in the **Verify Contact Details** pane.



1. In Dynamics 365 Sales, open the **Verify Contact Details** pane as described in the section above.
2. Under the LinkedIn Sales Navigator widget, search for the new account of this contact using the **Change Account** field.
3. Select **Update contact** to change the company information of the contact.

Ignore the contact details

To ignore a proposed update of an org chart, select **Ignore Update** in the **Verify Contact Details** pane.

See also

Troubleshooting LinkedIn integration errors

Add LinkedIn Sales Navigator controls to forms

3/3/2020 • 4 minutes to read • Edit Online

Prerequisites

- You have Customizer or System Administrator security role in Dynamics 365.
- To test the controls, you need to be a LinkedIn Sales Navigator seat holder.

Add Sales Navigator controls to a form

You can use the web app to add custom controls on any form or entity of a Unified Interface app in Dynamics 365 that contains a field for last name, primary contact, or account name.

There are different types of LinkedIn controls which are added automatically when using the latest version of the out-of-box integrations:

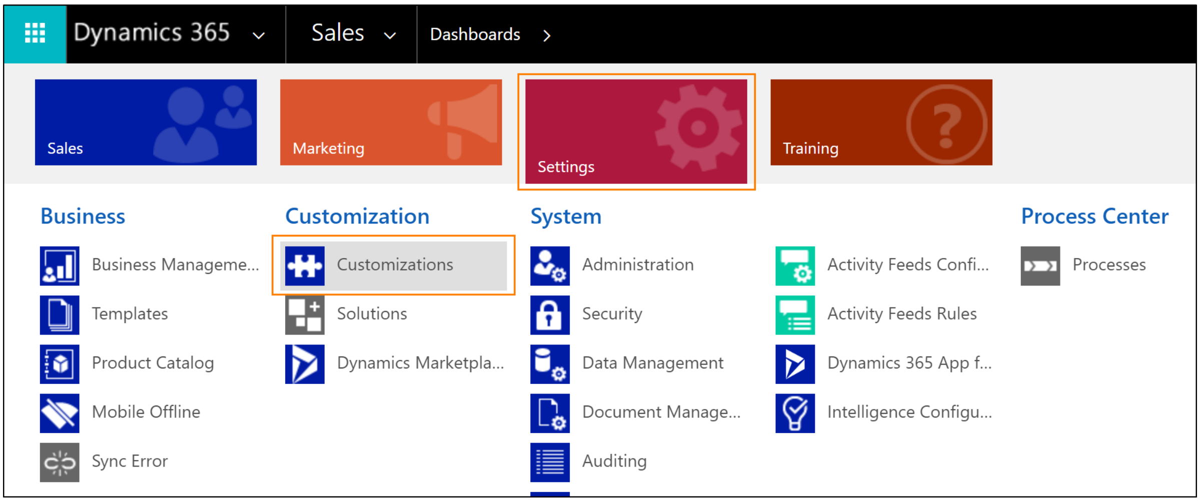
- **LinkedIn Sales Navigator Lead (member profile)**: Shows information about a LinkedIn member profile using a specific lead or contact name.
- **LinkedIn Lead Lookup Control**: Shows member profile information using the name of the primary contact related to the record.
- **LinkedIn Sales Navigator Account (company profile)**: Shows information about a LinkedIn company profile using a specific account name.
- **LinkedIn Account Lookup Control**: Shows company profile information using the account name related to the record.
- **LinkedIn InMail Control**: Shows a form where you can send an InMail message to another LinkedIn member.

The Sales Navigator controls can be added by modifying field on a form in Dynamics 365. Modify the following fields according to the control type. Optionally, you can add multiple fields to match the control to make the matches more relevant. Keep in mind that this requires all fields to match before a member profile or company profile is suggested. If no match, or in rare cases a wrong match is found, you can use the search interface to find the right profile.

Add a member profile to a Lead form

This procedure shows an example of how to add a LinkedIn Sales Navigator Lead (member profile) on the **Lead** form by modifying the **Last Name** field. Other controls can be configured in the same way on other entities where the controls aren't placed by default.

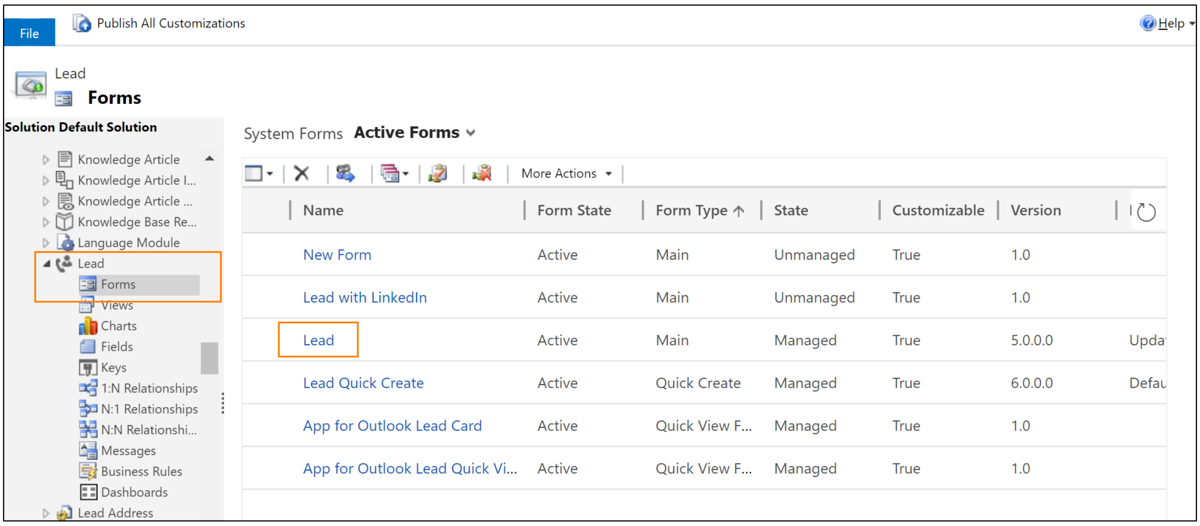
1. In the web client of Dynamics 365, go to **Settings** > **Customizations**.



2. Select **Customize the System**. For this example, we'll customize the default solution. Learn more about customizing Dynamics 365 apps.

3. Expand the **Entities** node and select the entity you want to customize. You can use virtually any entity, but for this example, we'll select the **Lead** entity and expand the node.

4. Select **Forms** and then select the default **Lead** form.



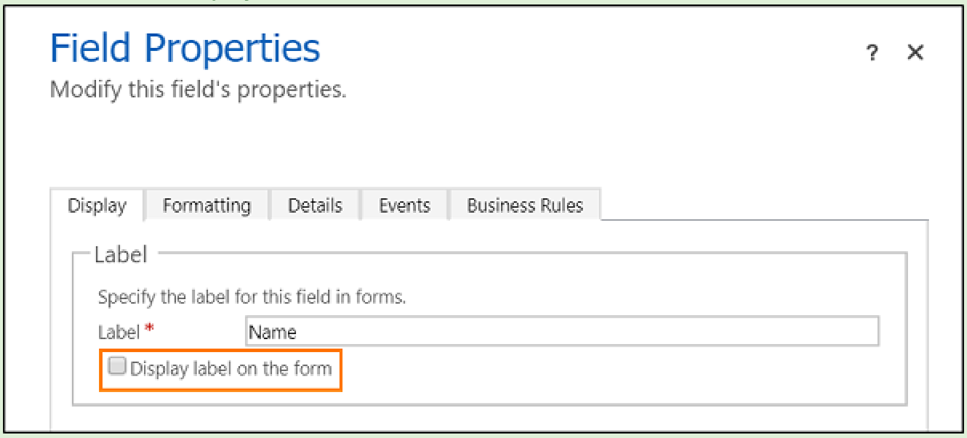
5. To add a reference to a custom control, begin by opening a field on the form, which will be bound to the primary attribute of the control (“Last Name” field for the member profile control and “Company Name” for the company profile control). In this example, we already have the **Last Name** field to the form.

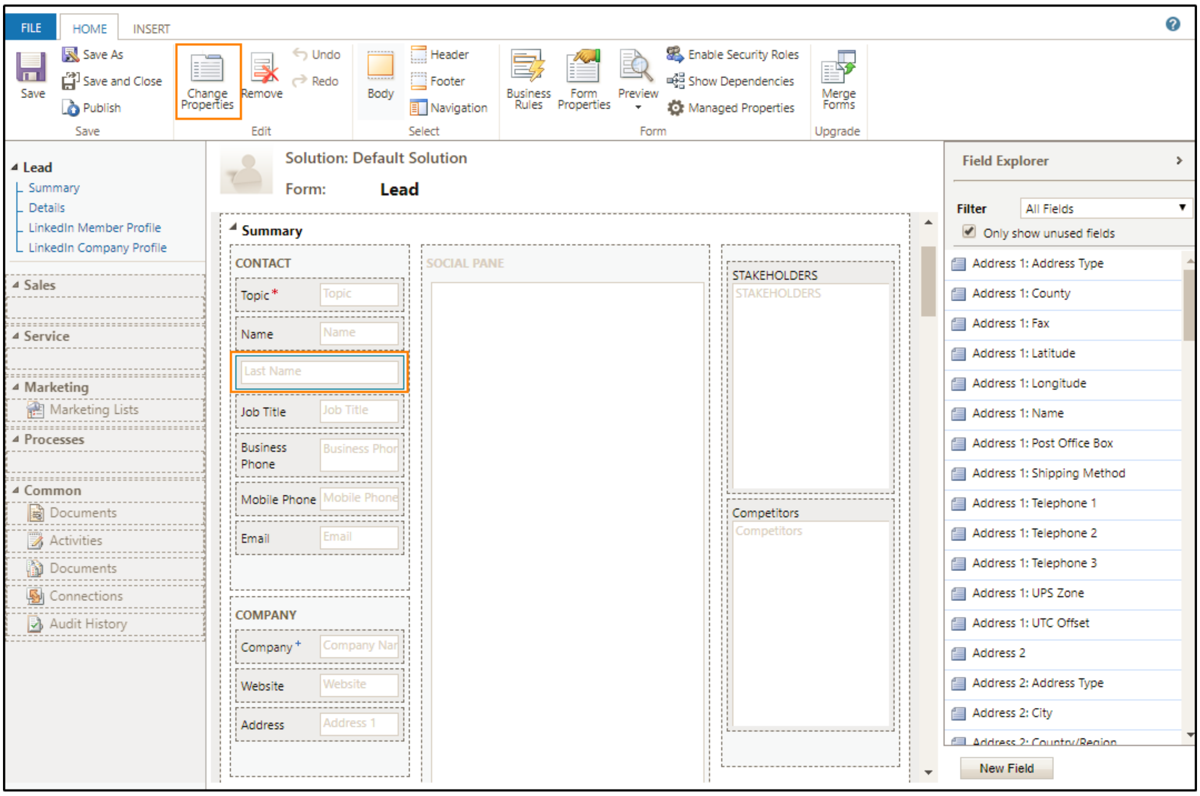
> **IMPORTANT**
>
> Member profile and company profile controls are read-only controls. We recommend that you create a copy of the two fields ("Last Name" and "Company Name") that you're binding these controls to, so that you can continue to edit the fields.

6. Select the **Last Name** field and then select **Change Properties** in the ribbon.

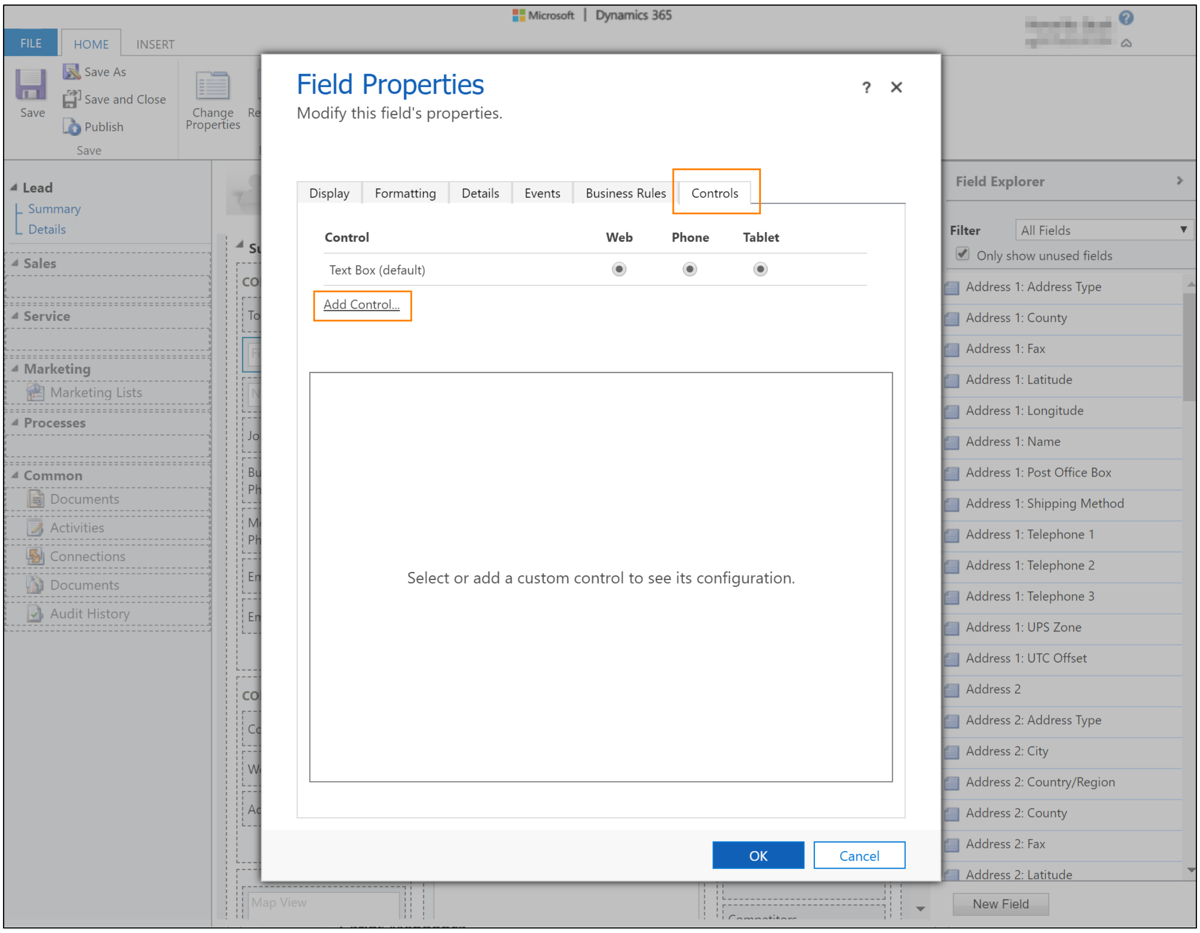
TIP

By default, controls on the Unified Interface show in two columns with the label and value side by side. To maximize the control so that it takes the full horizontal space available on the column, clear the **Display label** on the form check box on the **Display** tab.

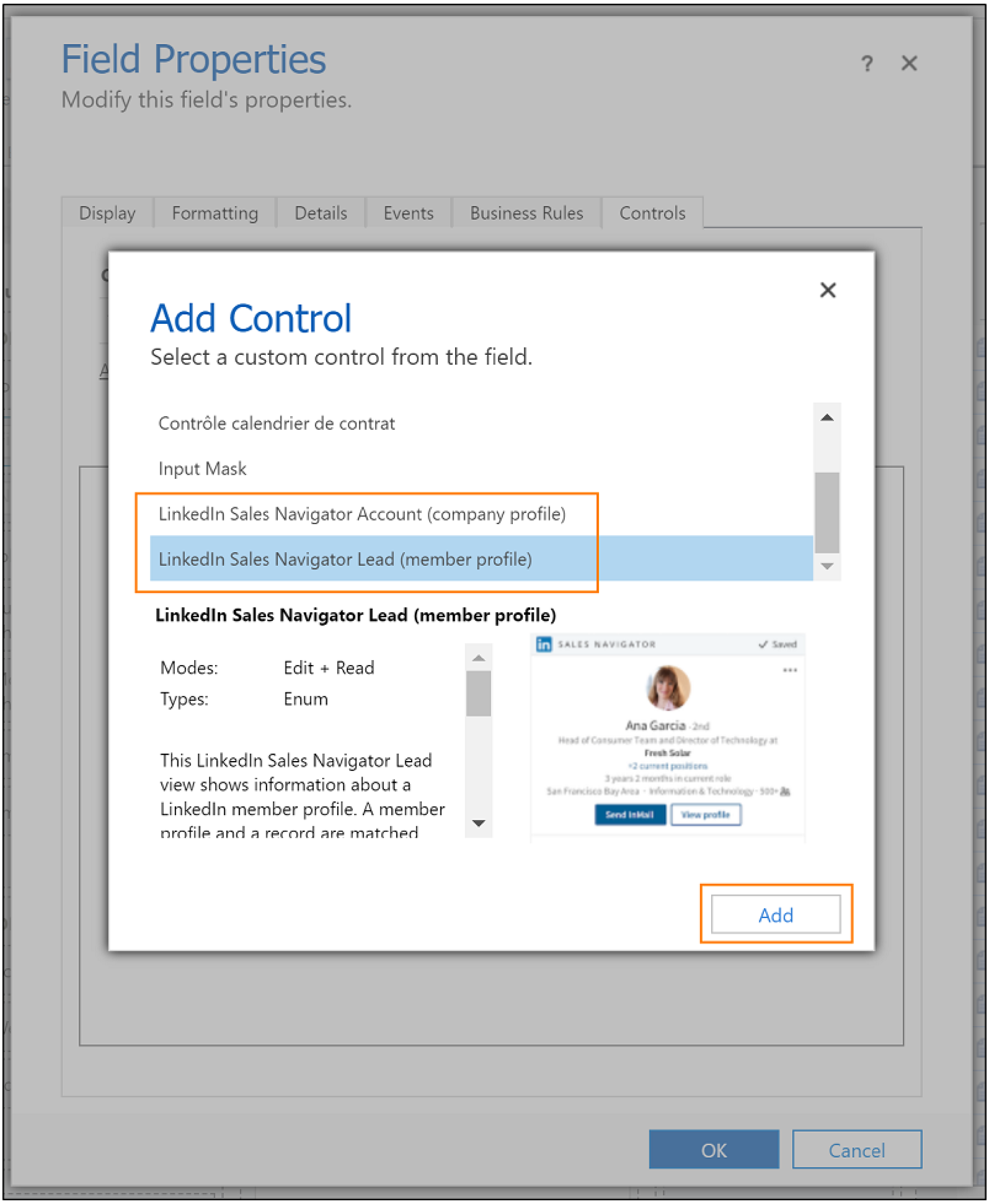




7. In the **Field Properties** window, switch to the **Controls** tab and select **Add control**.



8. Select the **LinkedIn Sales Navigator member profile** control and select **Add**.

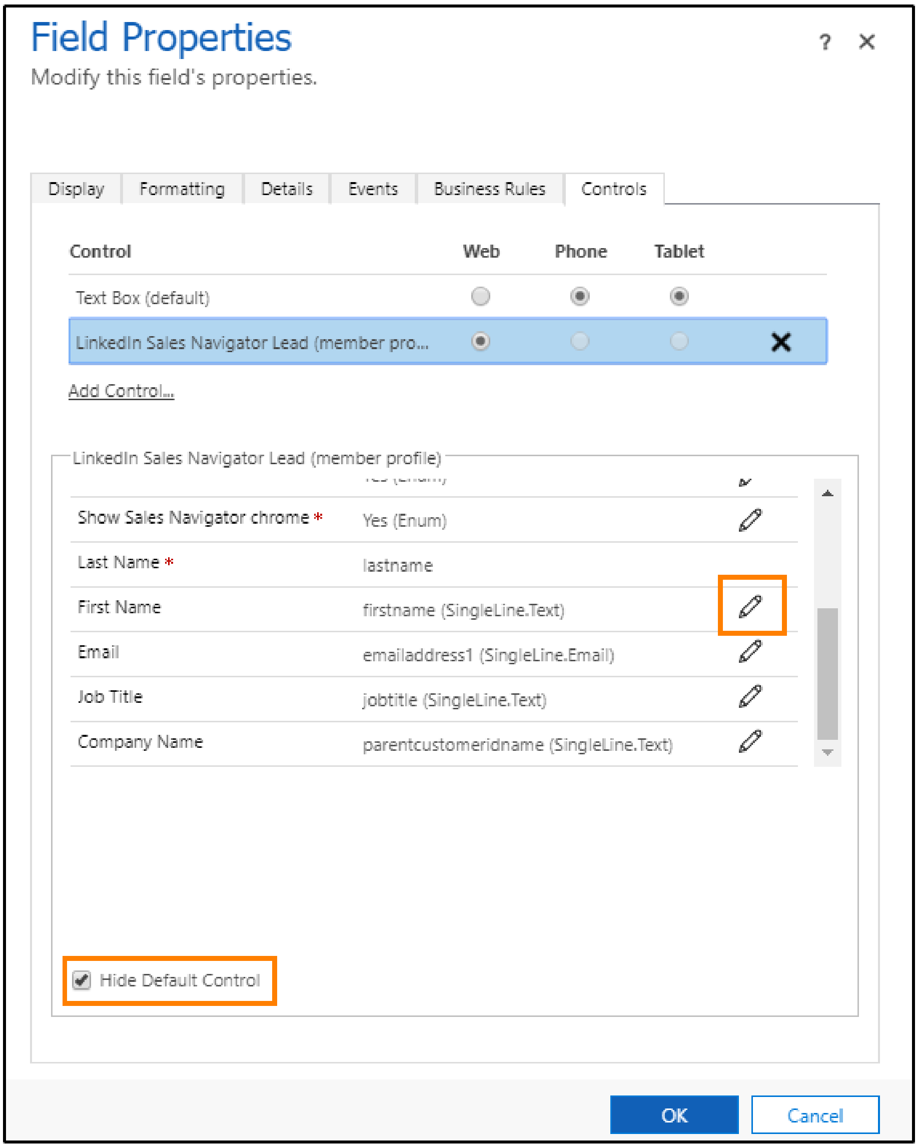


9. Now you need to configure the Sales Navigator control. In the **Control** area, select **Web** form factor for the LinkedIn control.

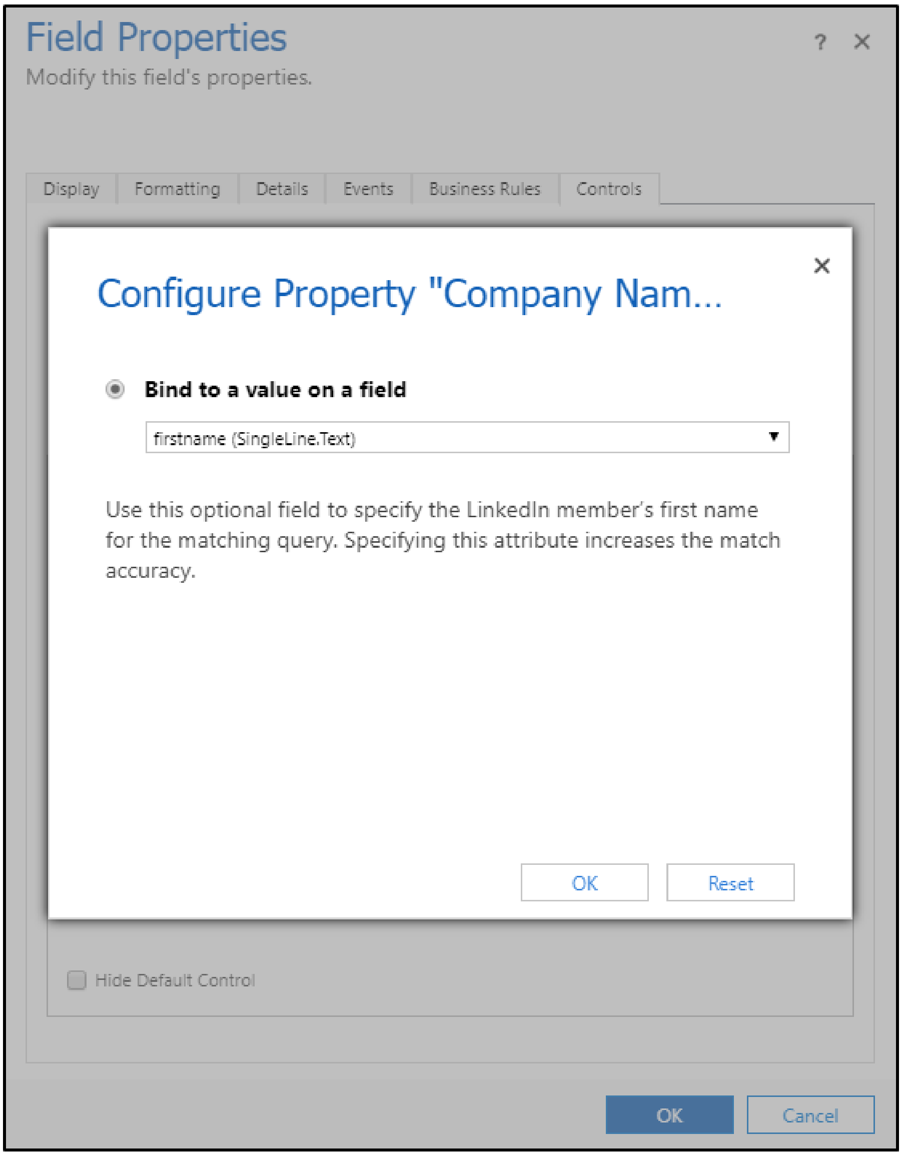
> **TIP**
>
> Currently, the controls are available on desktop form factors. On mobile (phone and tablet) scenarios, the controls fall back to the default platform control. To hide the default controls from the forms on mobile scenarios, select the **Hide Default Control** check box.

10. In the property area, make sure all required properties (with a red asterisk) have a binding configured. You might need to scroll down in the list to find additional required properties. For this example, we need to configure one additional property. We recommend binding the remaining parameters (first name, email, job title, and company name) to the corresponding fields on the Lead entity. The more parameters are passed to the control, the greater will be the accuracy to find the right match.
Select the **First Name** property with the description and select the pencil icon. Use this optional field to

specify the LinkedIn member's first name for the matching query. Specifying this attribute increases the match accuracy.

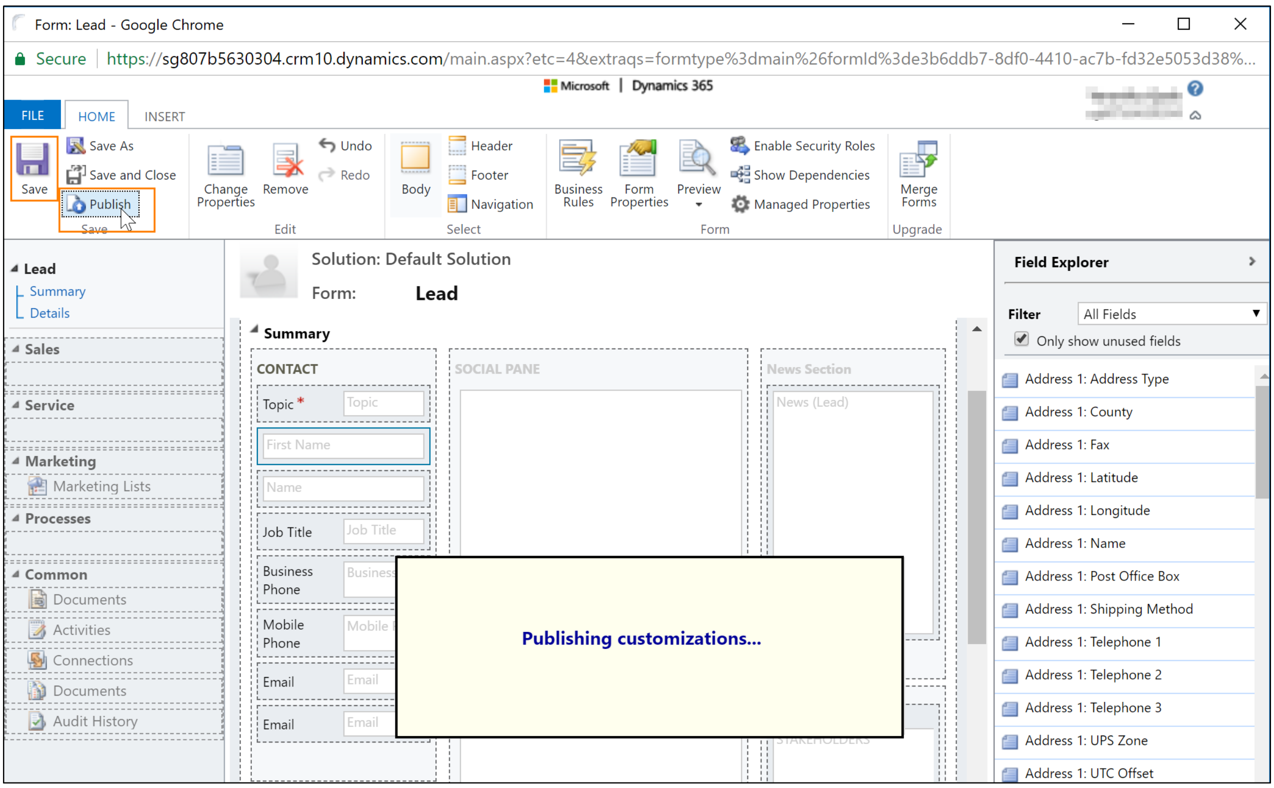


11. In the **Bind to a value on a field** list, select **firstname (SingleLine.Text)** and select **OK**.



12. Select **Add** in the Field Properties window.

13. In the **Form Editor**, select **Save** to apply your changes to the form.



13. Select **Publish** to make your customizations available to the organization.

> **TIP**
>
> When using the Microsoft Edge browser, add your Dynamics 365 domain as a trusted site. This is required to read cookies from the linkedin.com domain. To
>
> 1. Select the lock icon in the address bar on a Dynamics 365 record with Sales Navigator controls.
> 2. Select **Manage for all sites** under **Tracking prevention**.
> 3. Select **Exceptions** and add your Dynamics 365 domain to the list.

See also

Overview for LinkedIn Sales Navigator solutions
Install and configure LinkedIn Sales Navigator Controls
Work with Sales Navigator controls on forms

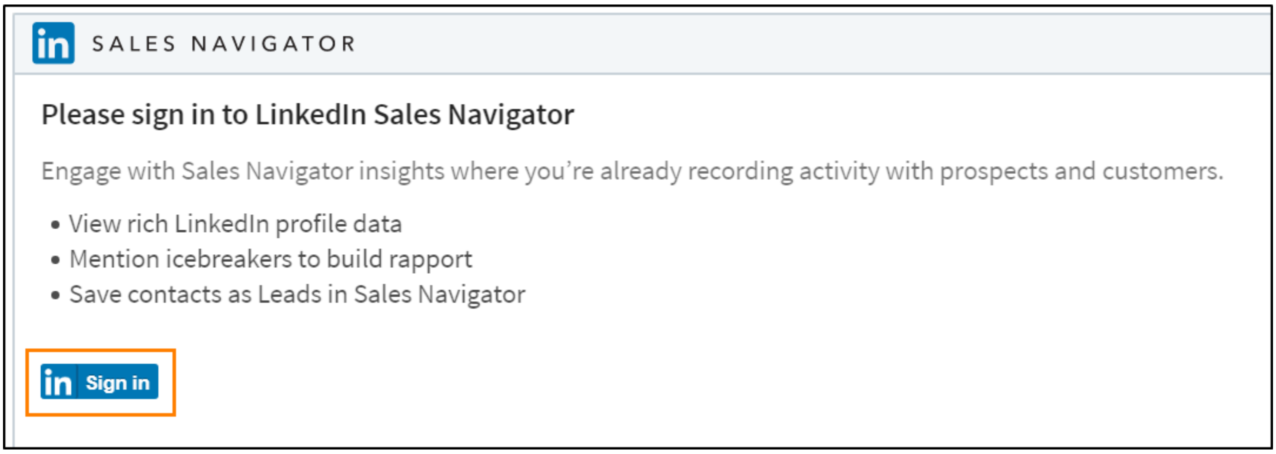
View Sales Navigator controls on forms

1/28/2020 • 2 minutes to read • Edit Online

To use the Sales Navigator controls, an admin needs to enable the Sales Navigator integration and you need to be a LinkedIn Sales Navigator Seat Holder. To customize the form with Sales Navigator controls a customizer needs to add the controls to a form.

View controls on the form

1. In Dynamics 365, open the Sales app.
2. If your organization has added LinkedIn controls to any of their forms, you'll find the controls embedded on the form. A system administrator or customizer can add the controls to forms.
3. If you haven't signed in to LinkedIn Sales Navigator, select the **Sign in** button in the control and give the requested permissions to the app.



Work with the Sales Navigator controls

Both Lead and Account controls work by matching certain input parameters received from Dynamics 365 with LinkedIn member profiles and companies, such as:

- LinkedIn Sales Navigator Lead control: last name (primary), first name, email, job title, company name, and more fields from LinkedIn

LinkedIn Sales Navigator Account control: company name (primary), company website, and more fields from LinkedIn

Once a match is found, the control will show related information about the member or company profile and will persist when you load the form again. Optionally, you can save recommended leads as new leads in Sales Navigator.

Select the right match from multiple matches

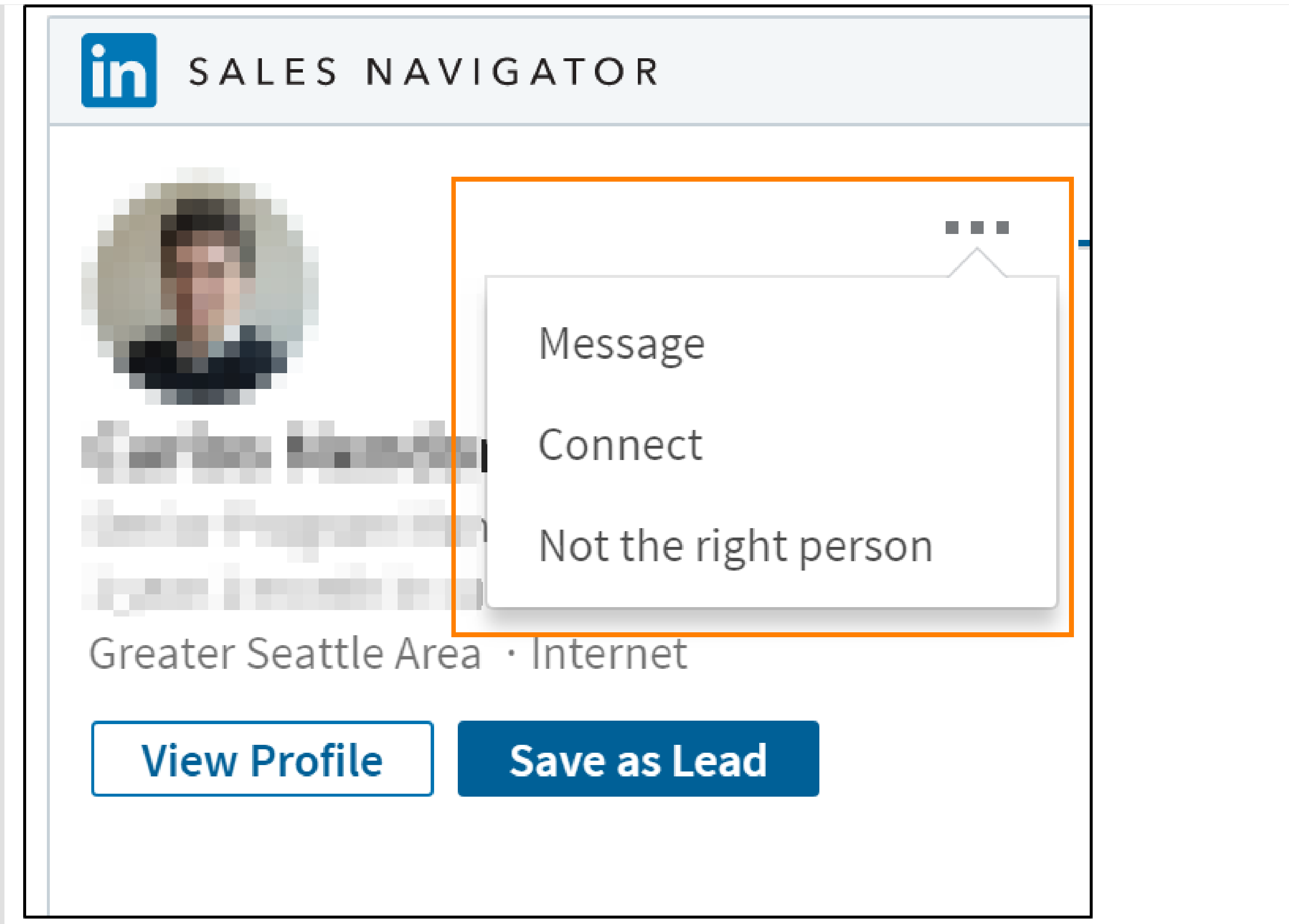
If the system can't find a unique match for a person's profile, it will suggest potential matches.

Select **Match** on the correct profile to map it to the related record.

Change the incorrect matching

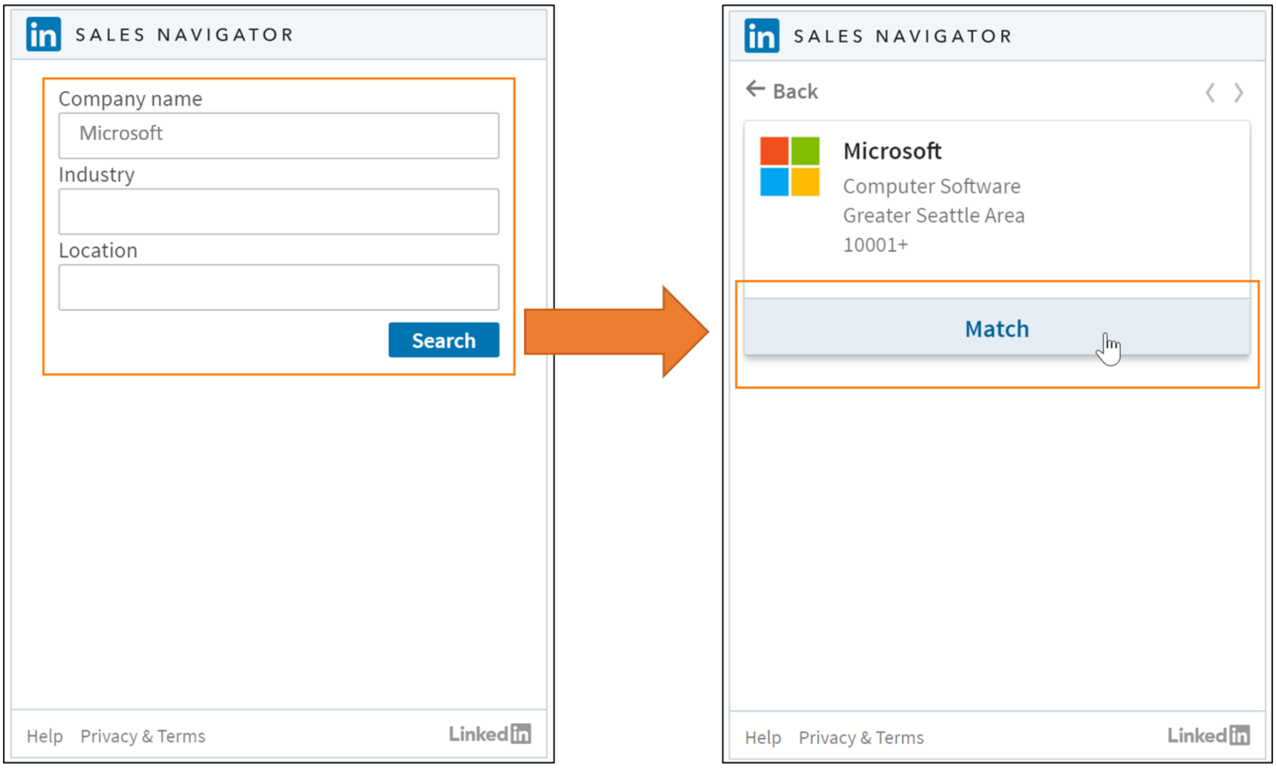
If the control doesn't load the correct profile on the first match, you can change the matching permanently.

1. Select the "..." (more commands) menu.
2. Select the **Not the right person** option.
3. Find the correct match on LinkedIn with the search interface.
4. Additionally, you can send LinkedIn members a request to **Connect** or **Message** them using InMail in Sales Navigator.



Find a matching company for an account

If no company account is associated with a person's profile, there's no company profile suggested. You can use the search interface to find the right company and match it to the related account.



1. Enter the Name and other known details of the company you're looking for.
2. Select **Search**.
3. Review the suggested match and select **Match** to associate it with the related account.

See also

[Overview for LinkedIn Sales Navigator solutions](#)
[Install and configure LinkedIn Sales Navigator Controls](#)
[Customize forms to show Sales Navigator controls](#)

Troubleshooting LinkedIn integration errors

7/9/2020 • 2 minutes to read • Edit Online

This article helps you troubleshoot and resolve issues related to LinkedIn integrations in Dynamics 365 Sales.

Error in enabling LinkedIn updates

When enabling the data validation option (**Enable LinkedIn updates**) in the **Sales Navigator Integration Settings** dialog box, you might see the status that data validation has failed. The possible errors are:

- Data validation has failed because CRM sync is disabled in LinkedIn Sales Navigator.
- Data validation failed with some other error (for example, an "unexpected error").

For more information about the data validation capability of LinkedIn Sales Navigator, see Data validation.

Resolution

- If you get the data validation failure because CRM sync was disabled, verify the following:
  - CRM sync is enabled in LinkedIn Sales Navigator.
  - The setting for data validation is enabled in LinkedIn Sales Navigator. If this setting isn't turned on, you'll see the CRM sync disabled status even though CRM sync is enabled. If you aren't able to see the data validation setting in LinkedIn Sales Navigator, ensure that you have an appropriate Sales Navigator license. More information: Sales Navigator Data Validation - Overview
  - If you've turned on both the settings, ensure that you've turned on the **Enable LinkedIn updates** setting at least once.
- If the error is due to something other than CRM sync, you can try restarting data validation by first disabling it from the **Sales Navigator Integration Settings** dialog box, and then enabling it again.

See also

Dynamics 365 Sales troubleshooting guide