

# Sales Navigator for Salesforce Installation

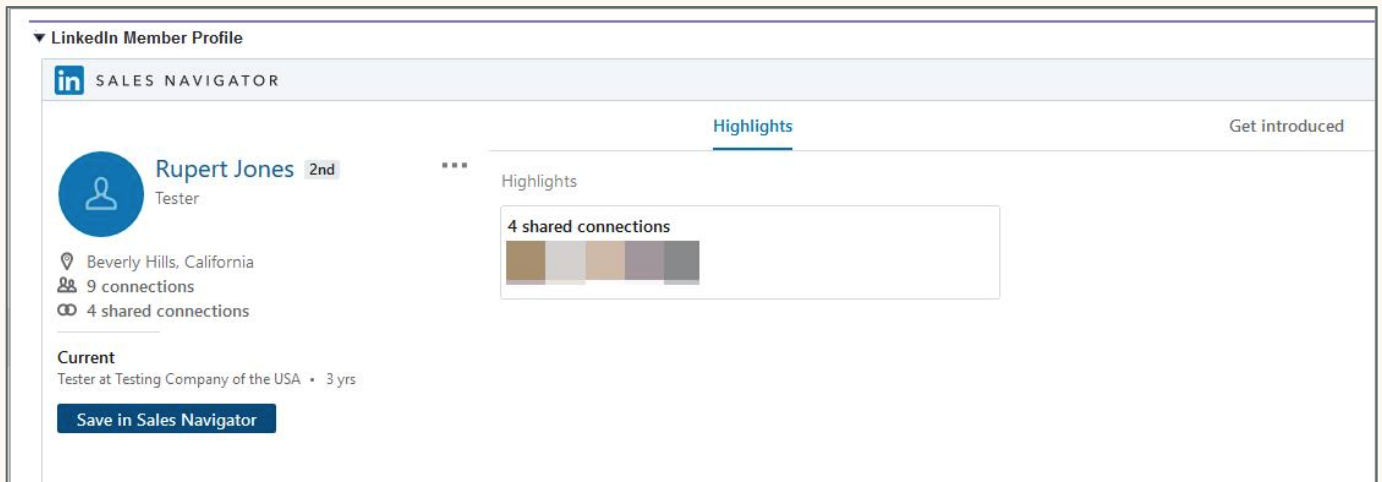
Classic View



SALES NAVIGATOR



If you need to install Sales Navigator for Salesforce Lightning View, please click [here](#).



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## Prerequisites

- You will need to be a Salesforce Full System Admin (**with access to View and Modify All Data**) on one of the following editions:
  - Salesforce: Enterprise, Performance, Unlimited, or Developer edition
  - Salesforce: Professional Edition requires API Access
  - This is not compatible with Salesforce1
- [Sales Navigator Team](#) or [Sales Navigator Enterprise edition](#)
  - A Sales Navigator Administrator + Team Member Seat is required

**Note:** Admin only seats can configure the feature, but will **not** be able to verify full functionality for other roles (as they will not be able to see Sales Navigator information in app)
- JavaScript enabled browser is required

## Before You Begin

- **Time Required:** Less than 1 hour
- Available for Leads, Contacts, Business Accounts, Person Accounts and Opportunities.
- Now available for [Person Account](#) types. Embedded profiles (Widgets) will work for both Lightning and Classic versions of Salesforce. ) will work for both Lightning and Classic versions of Salesforce.
  - **Note:** CRM Sync & Activity Write-Back do not support Person Account types.
  - By installing this application, you are **NOT** enabling CRM Sync. To enable Sync, complete this installation and visit the [Admin Settings](#) within Sales Navigator.
- To review the Sales Navigator for Salesforce application in the Salesforce app exchange: [Sales Navigator for Salesforce](#).

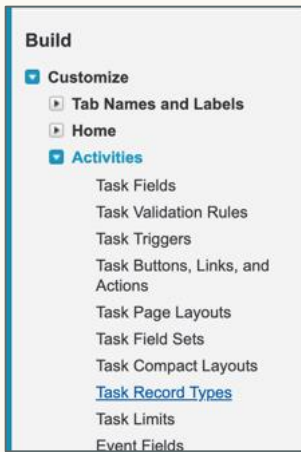
## Installation

### Setting up Global Actions

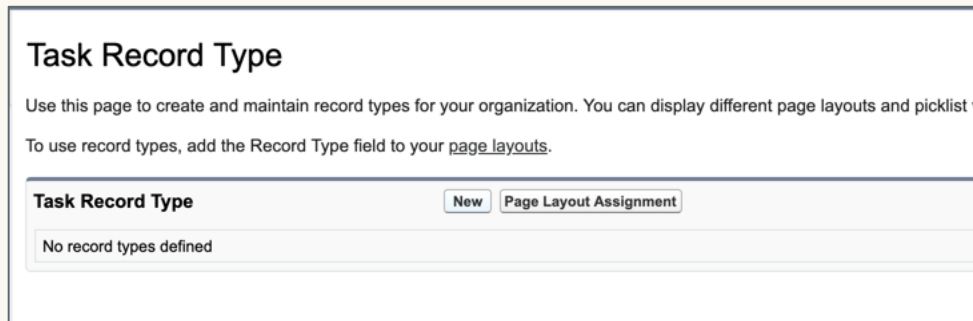
Installation of Sales Navigator will create new Record Types for Tasks and assign custom defaults. If you do not have **Task Record Types** created, this can cause Record Types for Global Actions (e.g. New Event, Log a Call, New Task, etc.) to default to **--Master--** which would remove existing Global Actions from the Activities list.

If after enablement you find that Global Actions are missing, please take the following steps:

1. Navigate to [Setup Menu](#).
2. Next, click [Build, Customize, Activities](#) and [Task Record Types](#).

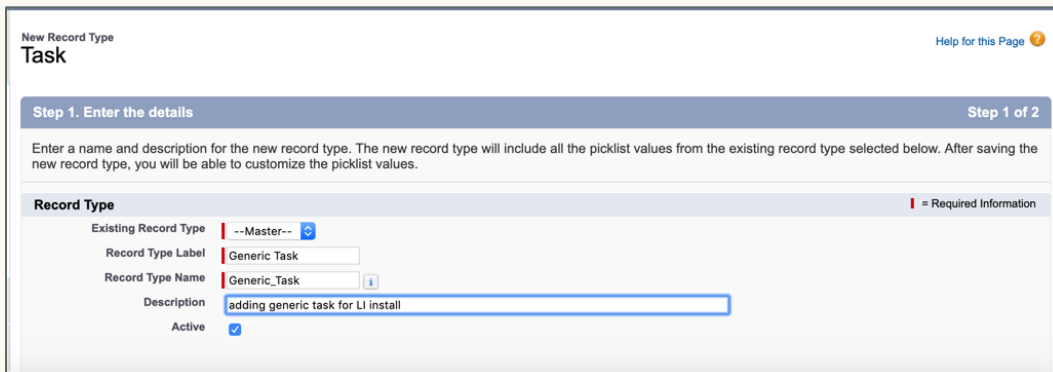


3. Click the [New](#) Button.



4. Next, input the following information:

- [Existing Record Type](#): Master
- [Record Type Label](#): Generic Task (or whatever name you choose)
- [Record Type Name](#): Generic\_Task (or whatever you choose)
- [Description](#): <your choice>
- [Active](#): <check>



5. Click [Next](#) button at the bottom of the page to advance to Step 2.

6. To Enable for your System Administrator Profile and for any other profiles who will be using the Task Record Type, choose [Apply one layout to all profiles: Task Layout](#). Then click [Save](#).

New Record Type Help for this Page

## Task

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**Step 2. Assign page layouts** Step 2 of 2

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Task Record Type: **Generic Task**  
 Record Type Name: **Generic\_Task**  
 Description: **adding generic task for LI install**

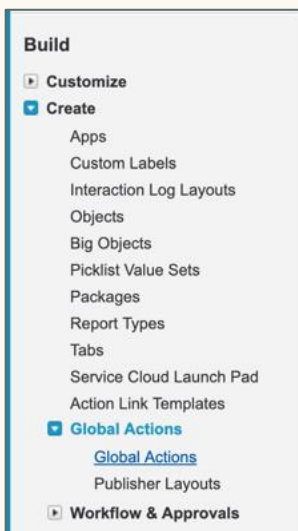
Select the page layout that users with this profile see for records with this record type. After saving, choose the picklist values that are available with this record type.

Apply one layout to all profiles Task Layout

Apply a different layout for each profile

Now that you have created the [Generic Task](#) record type, add the [New Task](#) and [Log a Call](#) buttons back into SFDC.

1. Choose [Setup](#), [Build](#), [Create](#), [Global Actions](#), and [Global Actions](#).



2. Click [Edit](#) next to [Log a Call](#).

**Global Actions**

Create, edit, and view global actions, which ca

Action	Label
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Layout</a>	<a href="#">Email</a>
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Layout</a>	<a href="#">Log a Call</a>
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Layout</a>	<a href="#">New Account</a>
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Layout</a>	<a href="#">New Case</a>
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Layout</a>	<a href="#">New Contact</a>
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Layout</a>	<a href="#">New Event</a>
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Layout</a>	<a href="#">New Group</a>
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Layout</a>	<a href="#">New Lead</a>
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Layout</a>	<a href="#">New Note</a>
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Layout</a>	<a href="#">New Opportunity</a>
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Layout</a>	<a href="#">New Task</a>

- Using the drop-down next to [Record Type](#), choose [Generic Task](#), then [Save](#).

The screenshot shows the 'Edit Global Action' interface for 'Log a Call'. The form is titled 'Enter Action Information' and includes the following fields and options:

- Action Type:** Log a Call
- Target Object:** Task
- Record Type:** Generic Task (selected in a dropdown menu)
- Standard Label Type:** Log a Call
- Name:** LogACall
- Description:** (empty text box)
- Create Feed Item:**
- Success Message:** (empty text box)
- Icon:** Change Icon (with a telephone handset icon)

There are 'Save' and 'Cancel' buttons at the top right and bottom right of the form.

- For [New Task](#), click [Edit](#).
- Using the drop-down for [Record Type](#), choose [Generic Task](#), then [Save](#).

The screenshot shows the 'Edit Global Action' interface for 'New Task'. The form is titled 'Enter Action Information' and includes the following fields and options:

- Action Type:** Create a Record
- Target Object:** Task
- Record Type:** Generic Task (selected in a dropdown menu)
- Standard Label Type:** New [Record]
- Name:** NewTask
- Description:** (empty text box)
- Create Feed Item:**
- Success Message:** (empty text box)
- Icon:** Change Icon (with a document icon)

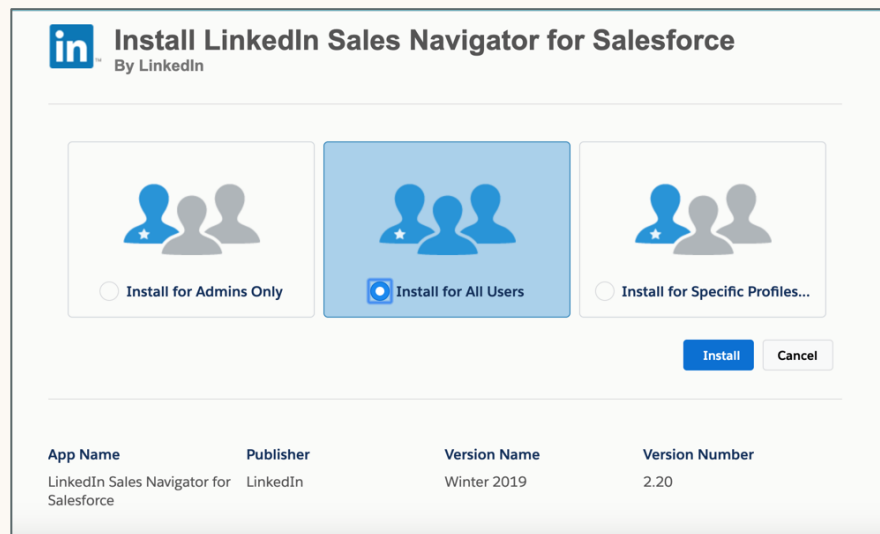
There are 'Save' and 'Cancel' buttons at the top right and bottom right of the form.

Note: If you previously created a custom or Generic Task for [Record Types](#), this should not have any impact on you. Please ensure [custom Task](#) is set as the default post installation of Sales Navigator.

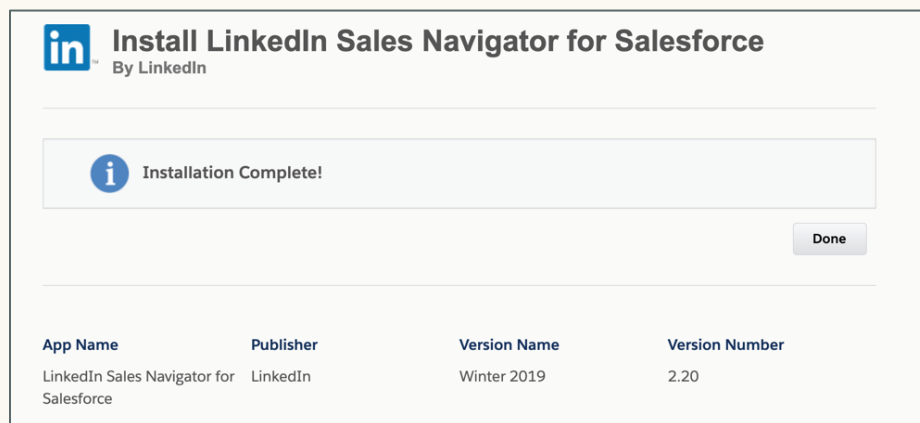
# Install Sales Nav Salesforce App

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:
  - If you see an [Installation Complete](#) screen, move on to adding the application in [Phase 2](#) (Configuration).



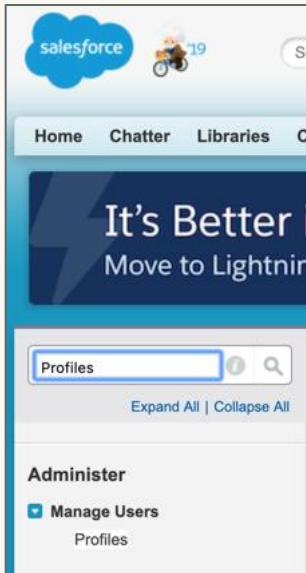
- If a [Processing](#) screen will appear, you will receive an email when the installation completes, at which point you can move on to [Phase 2](#) (Configuration).

# Configuration

## 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](#).



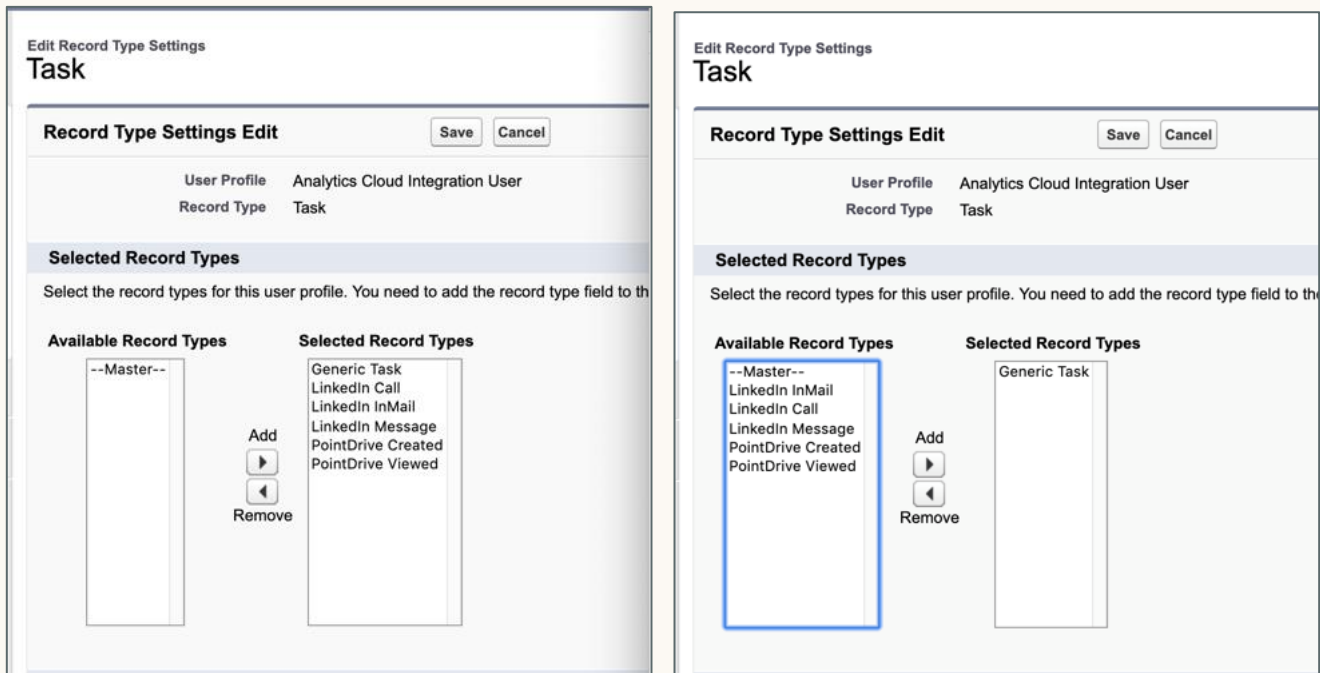
3. Click into your first Profile that is NOT System Admin.
4. Scroll to [Record Type Settings](#). (Click into [Object Settings](#) if you have the Enhanced View).
5. Find the [Tasks](#) section and click the [Edit](#) link. (If you have the Enhanced View, select [Tasks](#).)

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	Progress (Default), Completion <a href="#">[ Edit ]</a>
Content Versions	Metric Data Links
Contracts	Opportunities
Duplicate Error Logs	Orders
Duplicate Record Items	Performance Cycles
Duplicate Record Sets	Price Books
Events	Products
Feedback	Promoted Search Terms
Feedback Questions	Record Origins
Feedback Question Sets	Knowledge Search Activity
Feedback Requests	Setup Assistant Answers
Feedback Templates	Solutions
File Search Activity	Tasks
Transaction Security Actions	Task (Default), Message, PointDrive Presentation Created, PointDrive Presentation Viewed <a href="#">[ Edit ]</a>



- Remove the [LinkedIn Call](#), [LinkedIn InMail](#), [LinkedIn Message](#), [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.

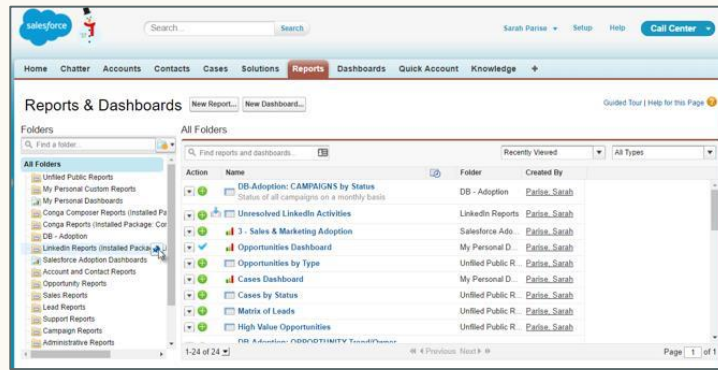


- Click [Save](#).
- Repeat for all Profiles (**Important: do not repeat for the System Admin Profile.**)
- Proceed to [Give users access to the LinkedIn Activities Report Folder](#) section.

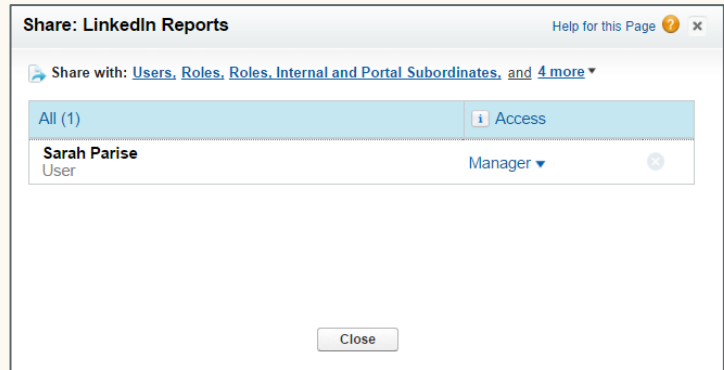
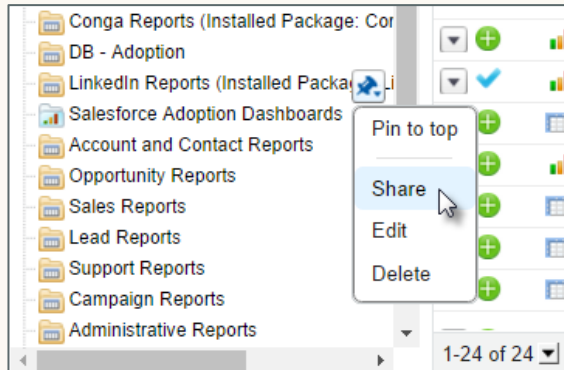
## Give Users Access to the LinkedIn Activities Report Folder

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](#).

- Navigate to your [Reports](#) tab.
- In the [Report Folders](#) panel on the left-hand side of your screen find the [LinkedIn Reports](#) folder.
- Hover over the [LinkedIn Reports](#) folder.
- Click the [push-pin](#) icon that appears.



5. Select [Share](#).



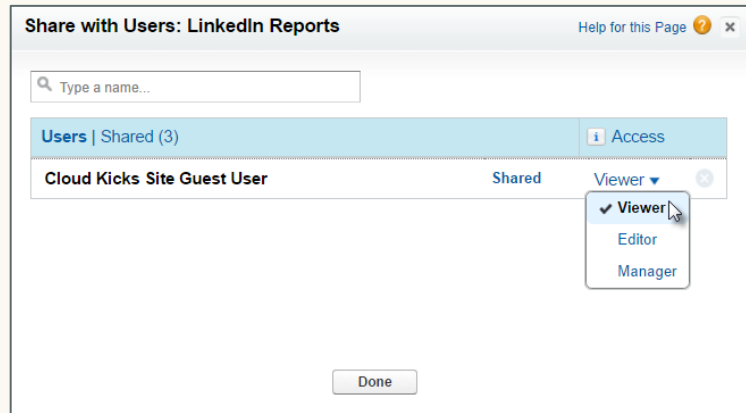
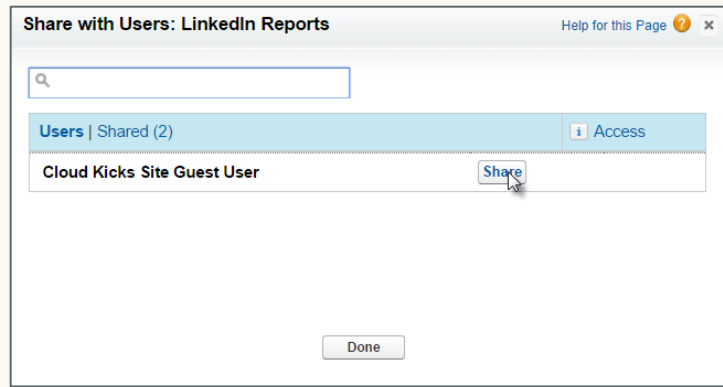
6. Click either [Users](#), [Roles](#) or [Roles and subordinates](#) to share this folder with the proper users based on your organization's security model.

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](#).

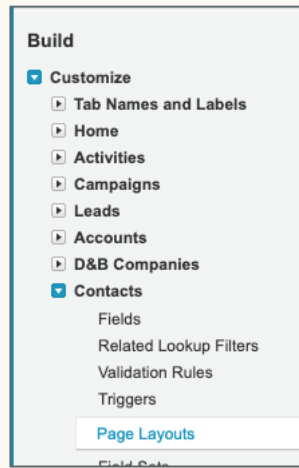
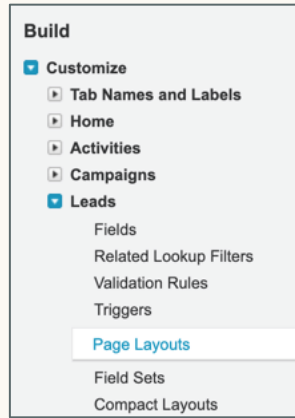
9. Click the [Done](#) button.

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

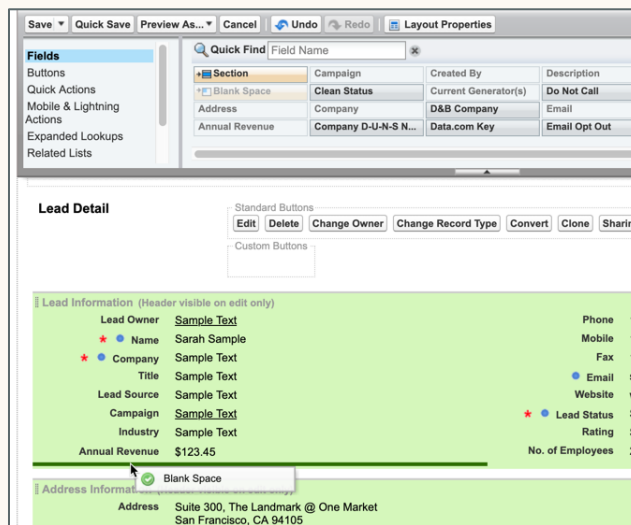
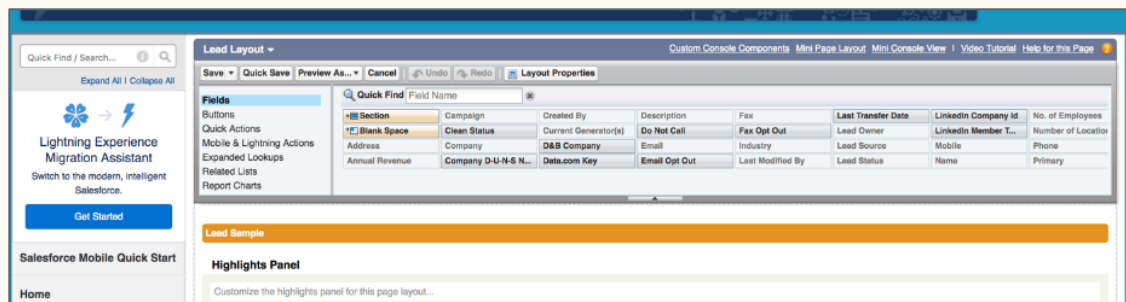


## Adding LinkedIn Member Profiles & Company Pages to Lead & Contact Page Layouts

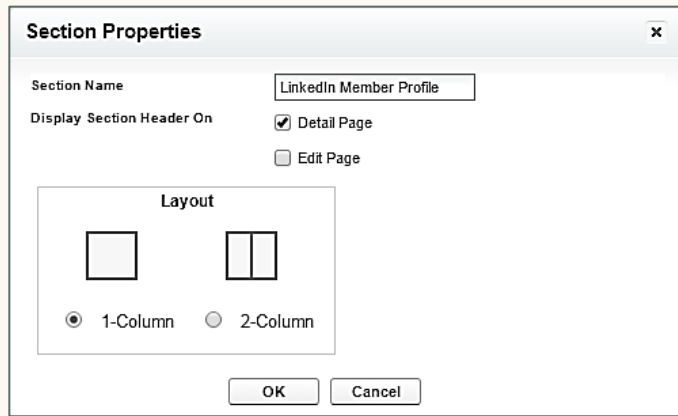
- Lead page layouts add:
    - LeadLinkedInMemberPage
    - LeadLinkedInCompanyPage Visualforce pages to the desired page layouts
  - Contact page layouts add:
    - ContactLinkedInMemberPage
    - ContactLinkedInCompanyPage Visualforce pages to the desired page layouts
1. For **Lead** page layout, go to **Setup, Build, Customize, Leads, Page Layouts**, and select **Edit** for the appropriate Lead on which you would like to see LinkedIn information. (For Contacts, **Setup, Build, Customize, Contacts, Page Layouts**.)



2. Drag a new [Section](#) down into the page layout where you would like to see the LinkedIn member profile. We recommend creating this section at the top to ensure that the Lead information and LinkedIn profile are visible together.



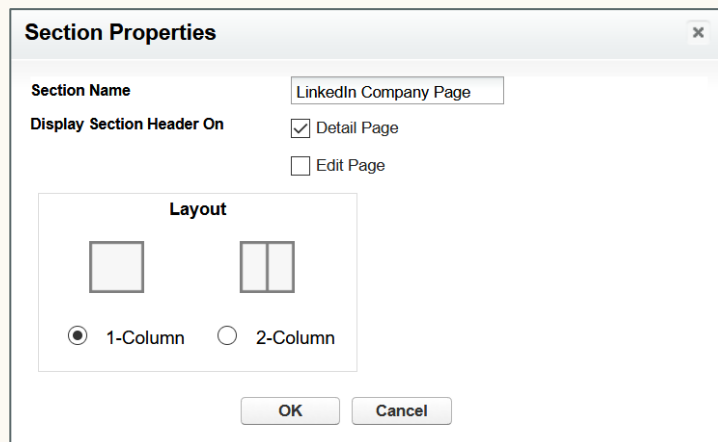
3. As shown in the screenshot, enter the following in [Section Properties](#) and click **OK**.
  - **Section Name:** LinkedIn Member Profile
  - **Detail Page:** <checked>
  - **Edit Page:** <unchecked>
  - **Layout:** <1-Column>



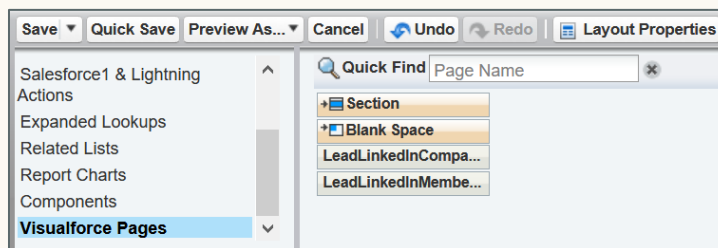
4. Drag in another [Section](#) and place this just below the newly created [LinkedIn Member Profile Section](#).

5. As shown in the screenshot below, enter the following in [Section Properties](#) and click [OK](#).

- [Section Name](#): LinkedIn Company Page
- [Detail Page](#): <checked>
- [Edit Page](#): <unchecked>
- [Layout](#): <1-Column>



6. Move to [Visualforce Pages](#) by using the scroll bar.

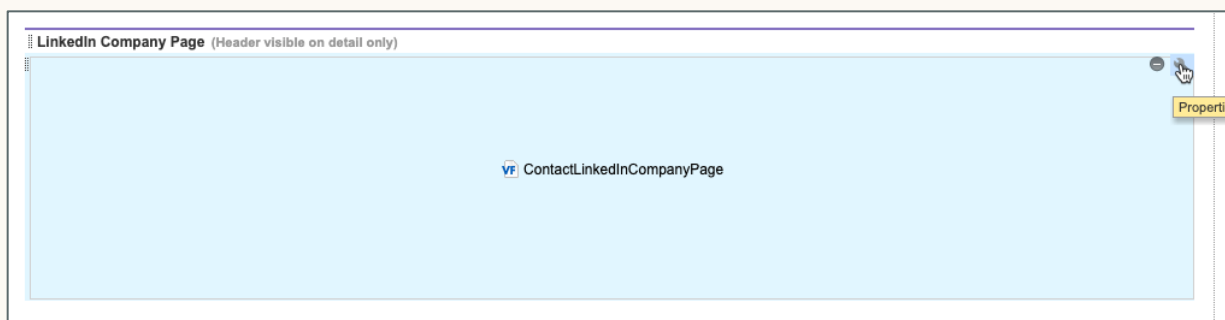


7. Drag one of these pages into the new [LinkedIn Member Profile](#) section:

- [LeadLinkedInMemberPage](#) Visualforce page
- [ContactLinkedInMemberPage](#) Visualforce page

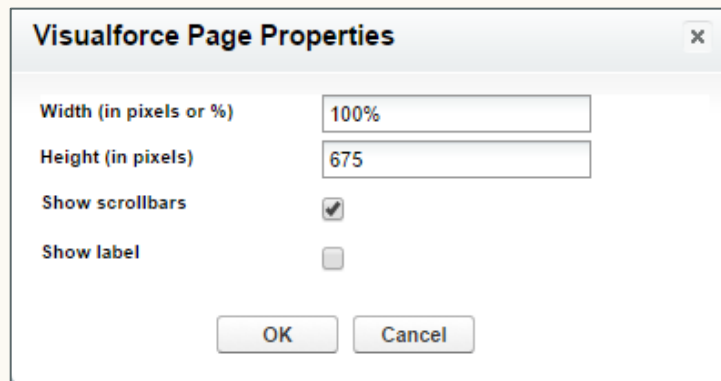


8. Click on the [Properties](#) icon at the top right of the [Visualforce](#) page component.



9. As shown in the screenshot, enter the following in [Visualforce Page Properties](#) and click **OK**.

- **Width:** 100%
- **Height:** 675
- **Show scrollbars:** <checked>
- **Show label:** <unchecked>



10. Drag one of these pages into the new [LinkedIn Company Page](#) section:
  - [LeadLinkedInCompanyPage](#) Visualforce page
  - [ContactLinkedInCompanyPage](#) Visualforce page
11. Click on the [Properties](#) icon at the top right of the Visualforce page component.
12. Enter the following in [Visualforce Page Properties](#) and click **OK**.
  - **Width:** 100%
  - **Height:** 675
  - **Show scrollbars:** <checked>
  - **Show label:** <unchecked>

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.

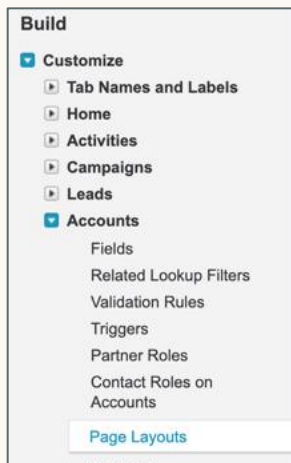
To remove this field, drag the [LinkedIn Member Token](#) field into the [Lead Information](#) section.

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.
14. Click [Save](#) at the top of the page to save changes to the [Lead](#) or [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.

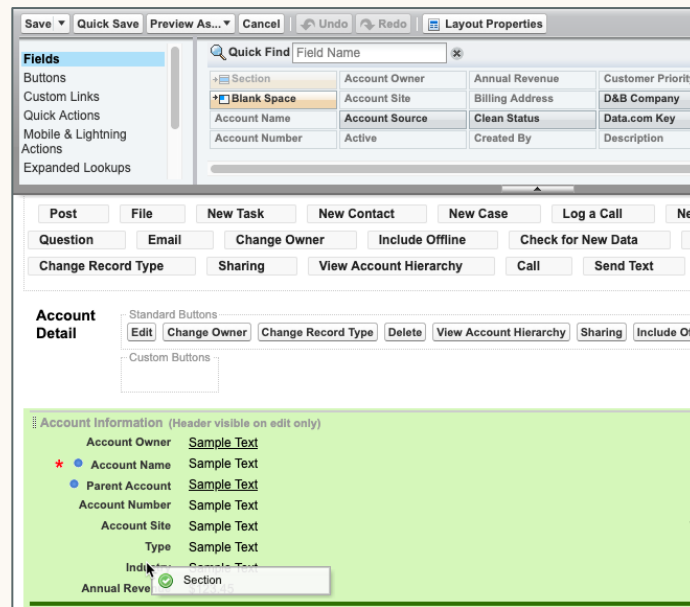
## Adding LinkedIn Company Profiles to Account & Opportunity Page Layout

- Account page layouts add [AccountLinkedInCompanyPage](#) Visualforce pages to the desired page layouts.
- Opportunity page layouts add [LeadLinkedInCompanyPage](#) Visualforce page to the desired page layouts.

1. Go to [Setup, Build, Customize, Accounts, Page Layouts](#), and select [Edit](#) for the appropriate Page Layout on which you would like to see LinkedIn Company Pages. (For Opportunity, go to [Setup, Build, Customize, Opportunity, Page Layouts](#).)



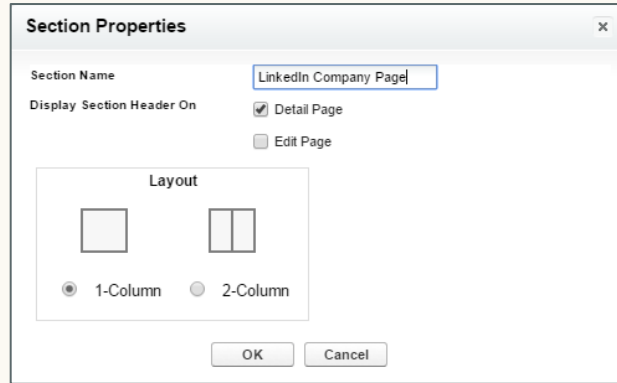
2. Drag a new [Section](#) down into the layout where you would like to see the LinkedIn company profile. We recommend creating this section at the top to ensure that the account information and LinkedIn profile are visible together.





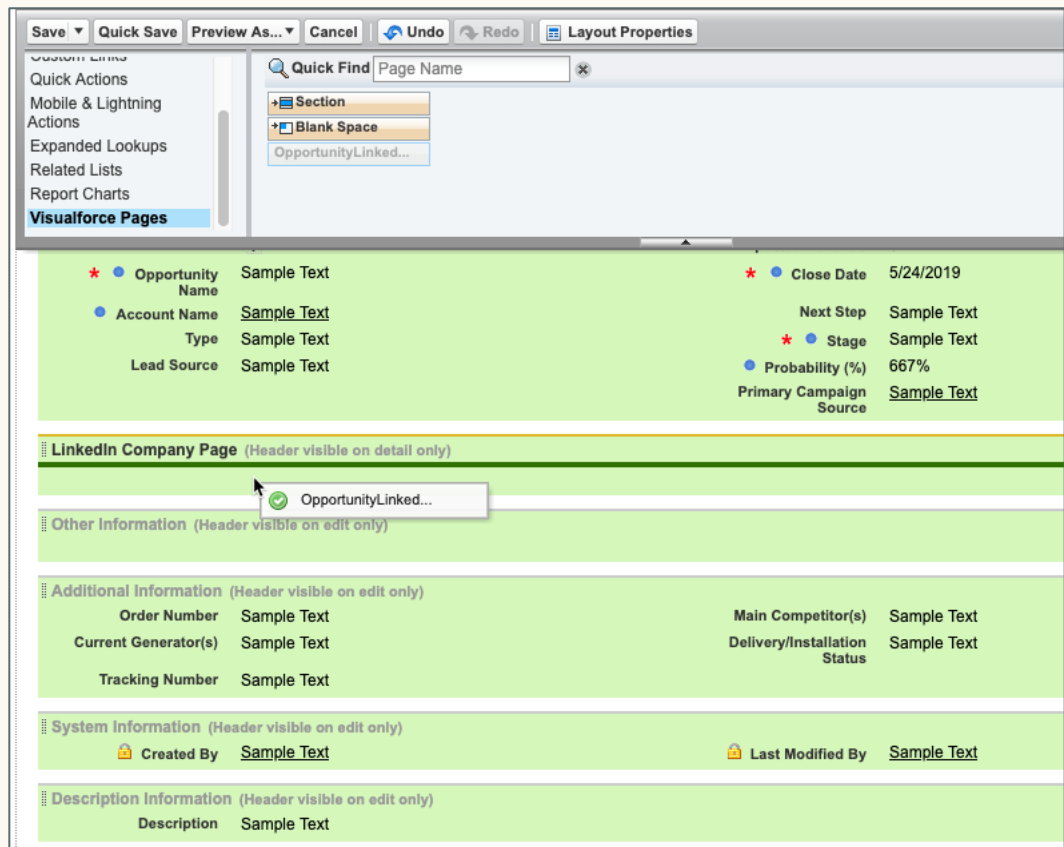
3. Enter the following in **Section Properties** and click **OK**.

- **Section Name:** LinkedIn Company Page
- **Detail Page:** <checked>
- **Edit Page:** <unchecked>
- **Layout:** <1-Column>

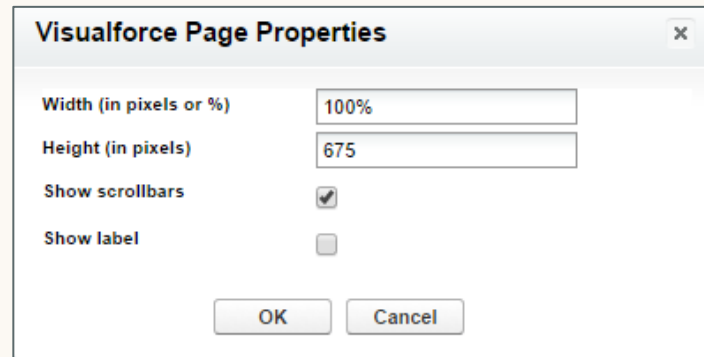


4. Drag one of these Visualforce pages into the newly created section:

- **AccountLinkedInCompanyPage**
- **OpportunityLinkedInCompanyPage**



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](#).
  - [Width](#): 100%
  - [Height](#): 675
  - [Show scrollbars](#): <checked>
  - [Show label](#): <unchecked>



**Visualforce Page Properties**

Width (in pixels or %)

Height (in pixels)

Show scrollbars

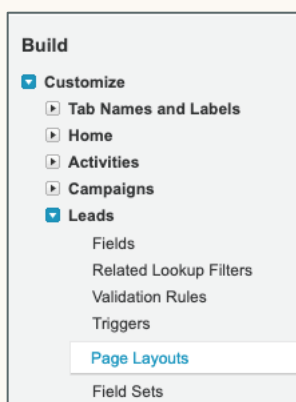
Show label

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.

## Optional

### Add the Record Type to Your Activities Related Lists

1. Go to [Setup](#), [Build](#), [Customize](#), [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.

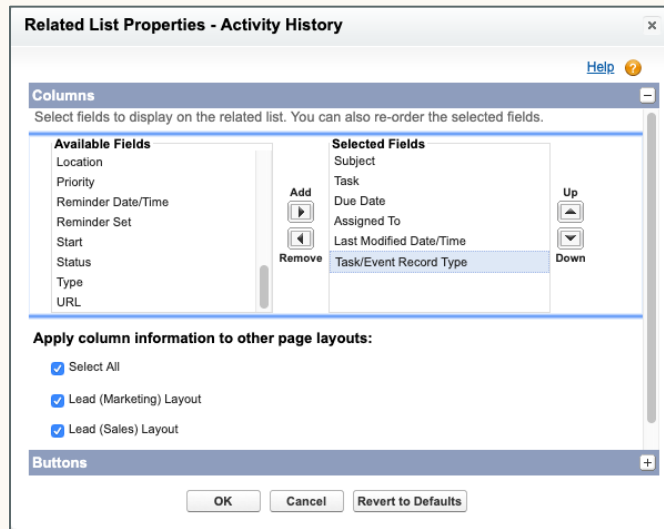
The screenshot shows two tables under the heading 'Related Lists'. The first table is titled 'Open Activities' and has columns: Subject, Task, Due Date, Status, and Priority. It contains one row with 'Sample Text' in Subject, a checkmark in Task, '5/30/2019 9:37 PM' in Due Date, 'Sample Text' in Status, and 'Sample Text' in Priority. The second table is titled 'Activity History' and has columns: Subject, Task, Due Date, Assigned To, and Last Modified Date. It contains one row with 'Sample Text' in Subject, a checkmark in Task, '5/30/2019 9:37 PM' in Due Date, 'Sarah Sample' in Assigned To, and '5/30/2019 9:37 PM' in Last Modified Date.

4. Move the **Task/Event Record Type** field from the list of **Available Fields** to the list of **Selected Fields** by clicking the arrows.

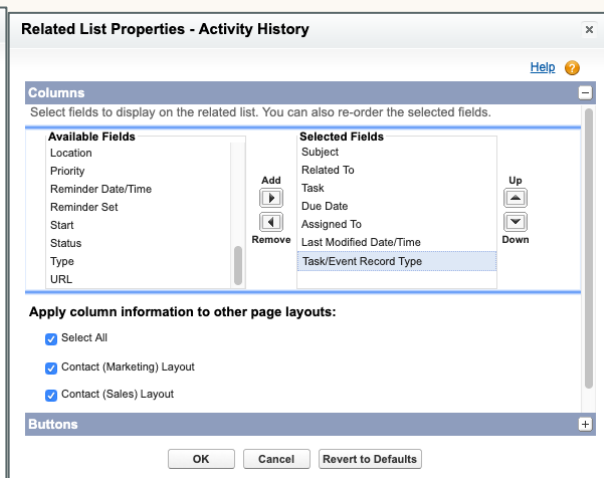
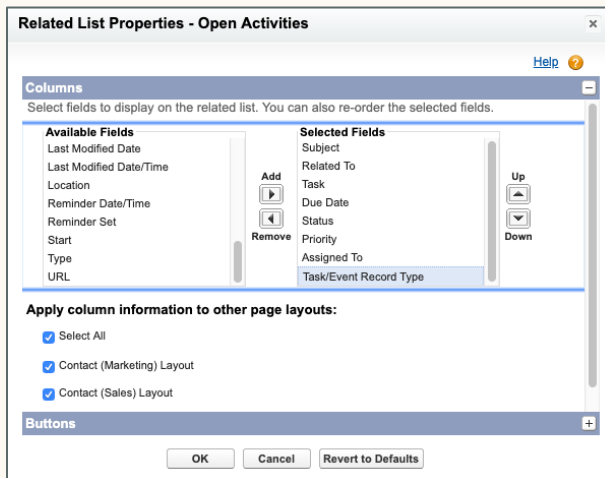
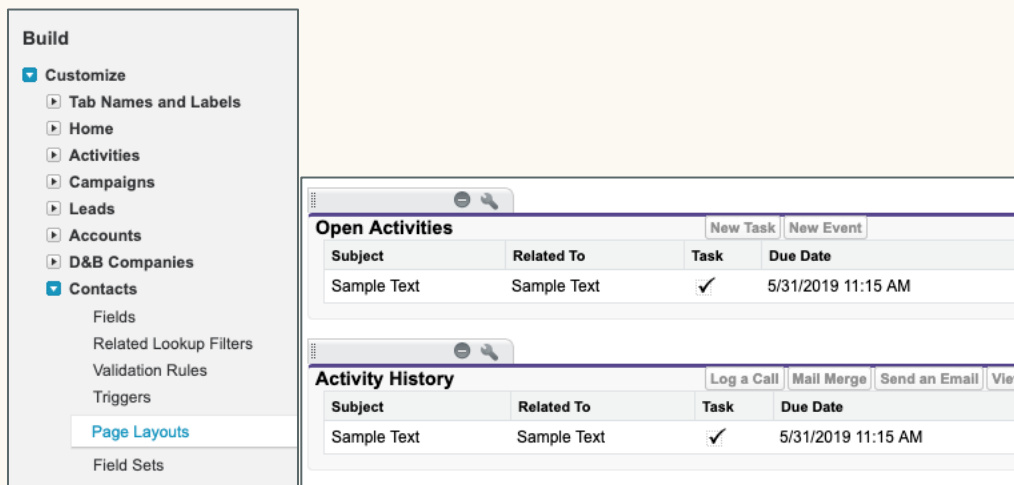
This screenshot shows the 'Columns' configuration window for 'Open Activities'. The 'Available Fields' list on the left includes 'Task/Event Record Type'. The 'Selected Fields' list on the right includes 'Subject', 'Task', 'Due Date', 'Status', 'Priority', and 'Assigned To'. A mouse cursor is clicking the 'Add' button (a right-pointing arrow) between the two lists. Below the lists, the 'Apply column information to other page layouts' section has three checked options: 'Select All', 'Lead (Marketing) Layout', and 'Lead (Sales) Layout'. At the bottom are 'OK', 'Cancel', and 'Revert to Defaults' buttons.

This screenshot is identical to the previous one, but the 'Task/Event Record Type' field has been moved to the 'Selected Fields' list. The 'Add' button is now disabled, and the 'Remove' button (a left-pointing arrow) is active. The 'Apply column information to other page layouts' section remains the same.

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.

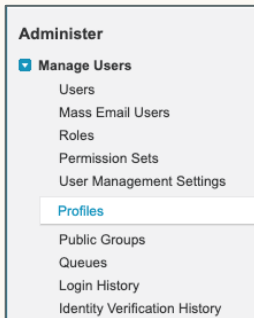


## Enabling Apex Class Access and Adding Visualforce Pages

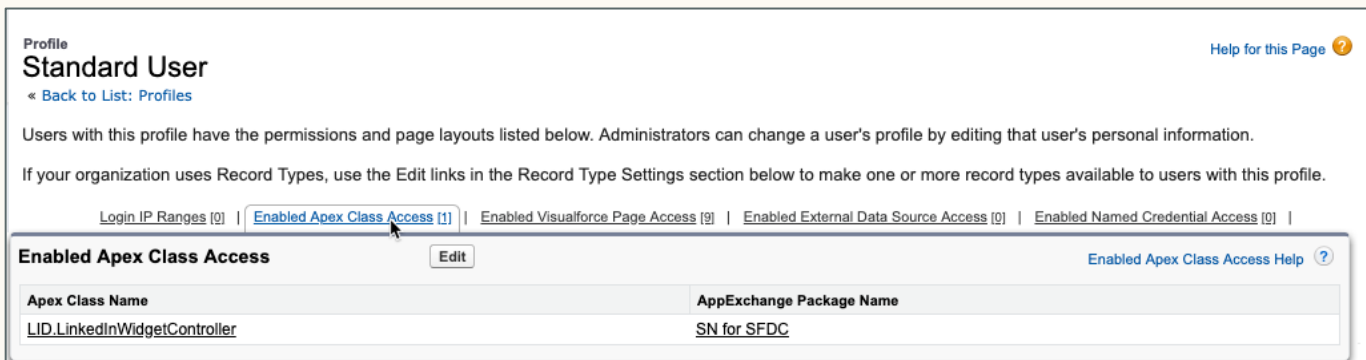
If you did **not** grant access to all users in the installation step, you will need to enable Apex Class Access and add Visualforce pages to the specific profiles you would like to be able to access the application.

**Note:** Steps 1 – 3 are only needed for Dev Orgs. Please move to [Step 4](#) if you are not using a Dev Org.

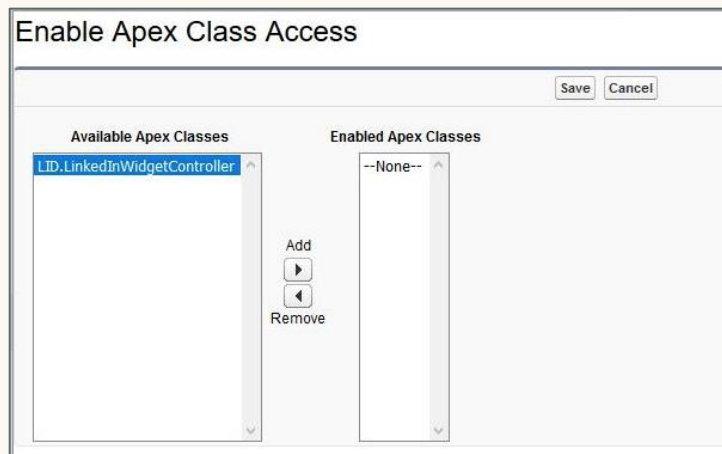
1. Go to [Setup, Administer, Manage Users, Profiles](#) and click on the profile for which you want to enable access to the app.



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](#).
  - o LID.SalesNavigatorProfileController
  - o LID.SalesNavigatorProfileHelper



4. Hover over the [Enabled Visualforce Page Access](#) link. Select [Edit](#).

Profile  
**Standard User**  
[Help for this Page](#)

[Back to List: Profiles](#)

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

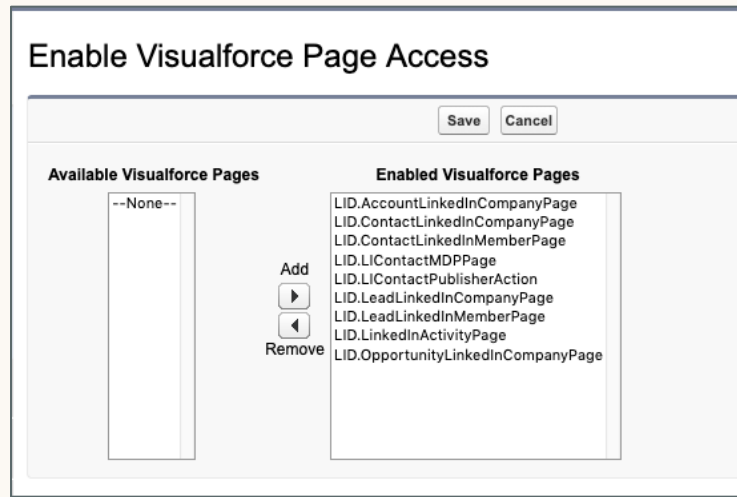
[Login IP Ranges \[0\]](#) | [Enabled Apex Class Access \[1\]](#) | [Enabled Visualforce Page Access \[9\]](#) | [Enabled External Data Source Access \[0\]](#) | [Enabled Named Credential Access \[0\]](#) |

**Enabled Visualforce Page Access** [Edit](#) [Enabled Visualforce Page Access Help](#)

Visualforce Page Name	AppExchange Package Name
<a href="#">LID.AccountLinkedInCompanyPage</a>	SN for SFDC
<a href="#">LID.ContactLinkedInCompanyPage</a>	SN for SFDC
<a href="#">LID.ContactLinkedInMemberPage</a>	SN for SFDC
<a href="#">LID.LIContactMDPPage</a>	SN for SFDC
<a href="#">LID.LIContactPublisherAction</a>	SN for SFDC
<a href="#">LID.LeadLinkedInCompanyPage</a>	SN for SFDC
<a href="#">LID.LeadLinkedInMemberPage</a>	SN for SFDC

5. Select the following pages from the [Available Visualforce Pages](#) list, add them to the [Enabled Visualforce Pages](#) list, and select [Save](#).

- LID.AccountLinkedInCompanyPage
- LID.ContactLinkedInCompanyPage
- LID.ContactLinkedInMemberPage
- LID.LIContactMDPPage
- LID.LIContactPublisherAction
- LID.LeadLinkedInCompanyPage
- LID.LeadLinkedInMemberPage
- LID.LinkedinActivityPage
- LID.OpportunityLinkedInCompanyPage



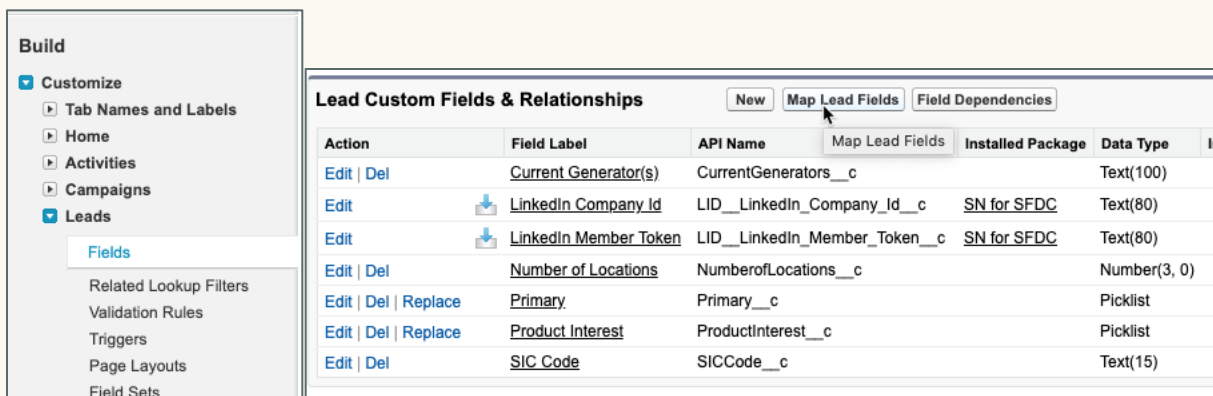
- Repeat steps 1-5 for every profile you would like to be able to access the application.

## Undo Lead Mapping for Previous Users of the LinkedIn Sales Navigator

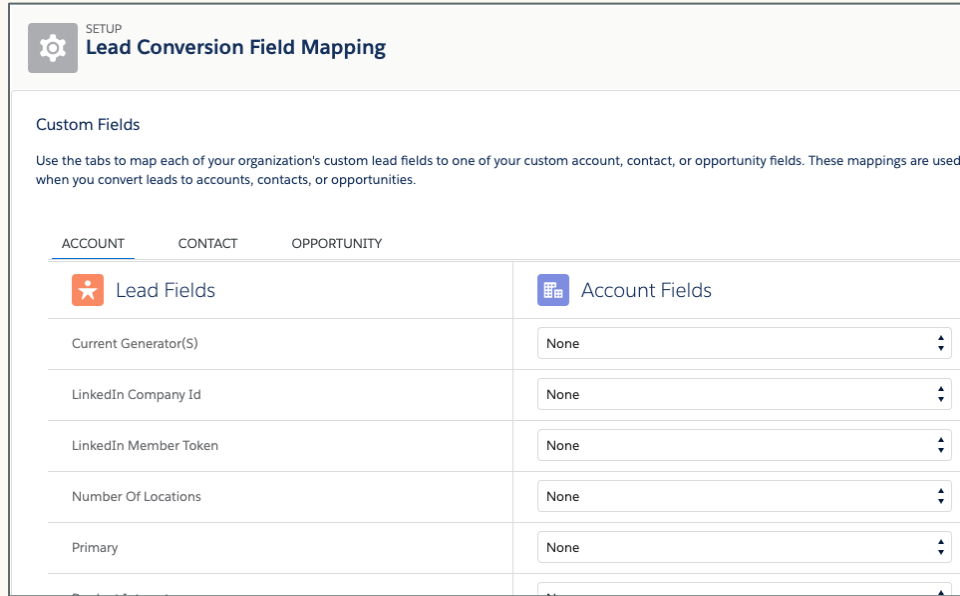
In previous versions of the LinkedIn Sales Navigator if you wanted the member and company associations to propagate to accounts and contacts after lead conversion, you would need to map the corresponding lead fields. You no longer need to do this. If you are installing LinkedIn Sales Navigator for the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

To remove this lead mapping:

- Go to [Setup](#), [Build](#), [Customize](#), [Leads](#), [Fields](#), and scroll down to [Lead Custom Fields and Relationships](#). Click [Map Lead Fields](#).



2. Select the custom fields of [LinkedIn Company Id](#) and [LinkedIn Member Token](#), and map them to [None](#).



3. Click [Save](#).

## Sales Nav Salesforce App Testing

### 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 image at the beginning of the document.



## Next Steps

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

- Sync and activity 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:

- Enablement requires less than 10 minutes.
- 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.
- 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](#).

## Additional Resources

More Info on Sales Navigator and to Contact Support: <https://www.linkedin.com/help/sales-navigator>

[Technical Implementation and Security Whitepaper](#)



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If you need help during installation, you can reach **LinkedIn Sales Solutions support** at <https://www.linkedin.com/help/sales-navigator>. Please note where you are in installation.