Install LinkedIn Sales Navigator for Salesforce Classic

1. Introduction

Integrating your Salesforce account with LinkedIn Sales Navigator helps you to search for LinkedIn leads, contacts, accounts, opportunities, and access other LinkedIn features through your Salesforce CRM. Learn more about the full benefits of our CRM integrations **here**.

2. Prerequisites

You must complete the following prerequisites before proceeding with the installation.

2.1 Salesforce Classic

You need full admin access to install a managed package and configure page layouts on one of the following editions:

- Salesforce: Enterprise, Performance, Unlimited, or Developer edition
- Salesforce: Professional Edition requires API Access and Chatter enabled. This might require an additional fee, please contact Salesforce for more information.

2.2 LinkedIn Sales Navigator

To view and test all functionalities of Sales Navigator Embedded Profiles in Salesforce, you need a:

- License for LinkedIn Sales Navigator Advanced Plus
- Sales Navigator Team Member seat or Administrator + Team Member access

2.3 Browser Requirements

Java script enabled browser is required to install and configure Sales Navigator.

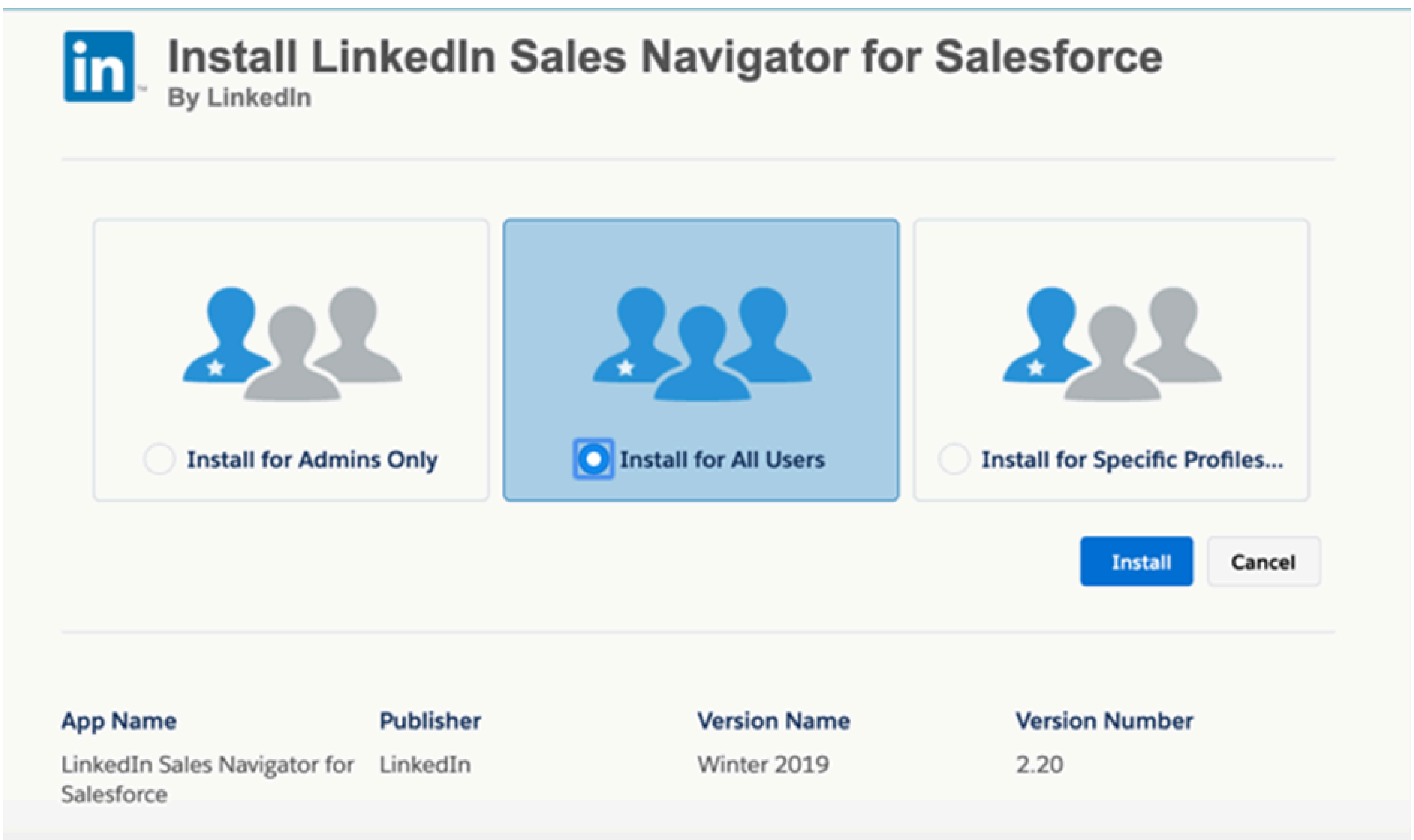
3. Installation

3.1 Install LinkedIn Sales Navigator

To install the LinkedIn Sales Navigator app:

1. Click **All Tabs** in the upper right corner of your screen.
2. Click **AppExchange** and you will be directed to another page. You may be prompted to login to your AppExchange account for verification purposes.
3. Search for **Sales Navigator** and select the **LinkedIn Sales Navigator for Salesforce** option. You will be directed to a new page.
4. Click **Get it Now**.
5. In the pop-up window that appears select either **Install in Production** or **Install in Sandbox**.
6. Review and agree to the terms and conditions and click **Confirm and Install**.
7. Determine the limited access to certain profiles and users:

- If you don't wish to limit any users, we recommend selecting **Install for All Users**.
- If you wish to limit access to certain profiles and users for whom you have already provisioned Sales Navigator Team seats or licenses, select **Install for Specific Profiles**.



8. Complete one of the following steps based on your experience:

- If you see an **Installation Complete** screen, proceed to the next section.

- If a **Processing** screen appears, you'll receive an email when the installation is completed post which you can proceed to the next section.

4. Configuration

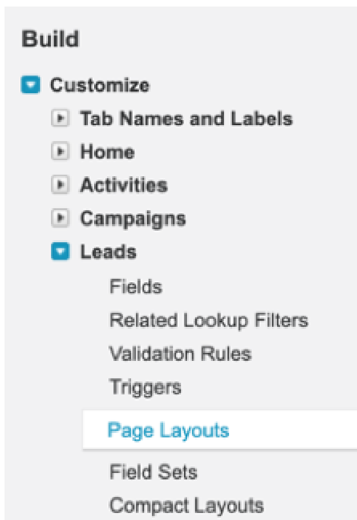
4.1 Add LinkedIn Member Profile and Company Pages to Lead and Contact Pages

Once you install LinkedIn Sales Navigator in your Salesforce Classic, you can add the LinkedIn Member and Company profiles in the following page layouts:

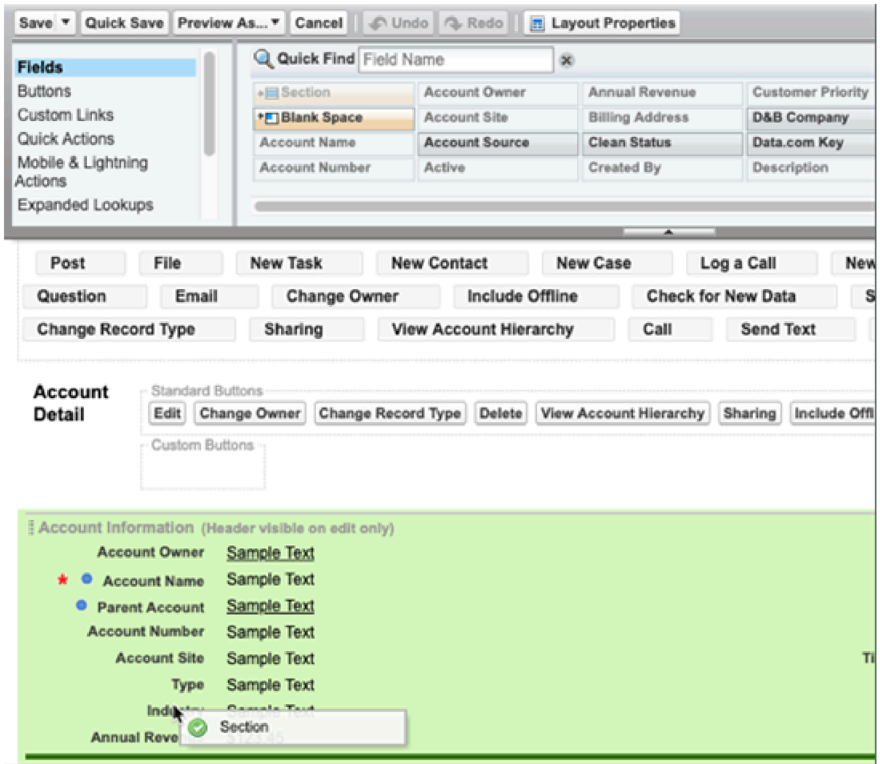
- Lead
- Contacts
- Account (Company profiles only)
- Opportunity (Company profiles only)

4.1.1 Add LinkedIn Member and Company profiles to the Lead page layout

1. Click **Setup** > **Customize** > **Leads** > **Page Layouts**.

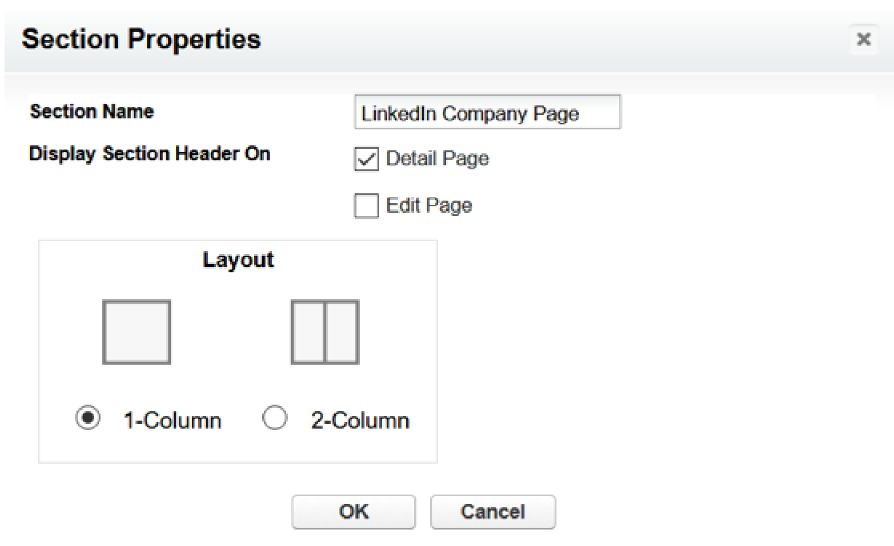


2. Drag a new **Section** to the layout where you'd like to see the LinkedIn company profile. We recommend creating this section at the top to ensure that the account information and LinkedIn profile are visible together.



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

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

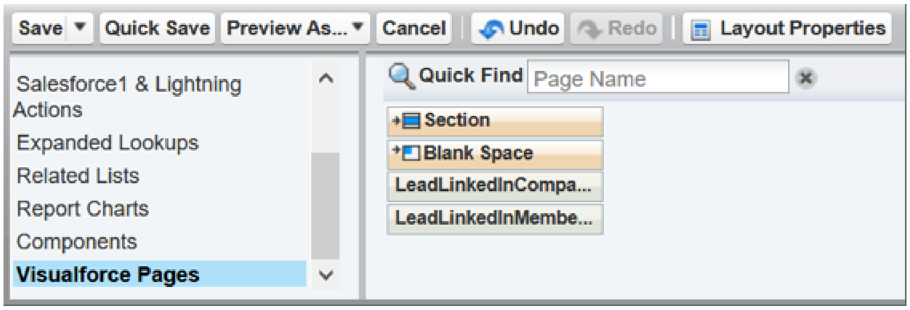


4. Drag another section and place it just below the newly created LinkedIn Member Profile section.

5. As shown in the screenshot below, enter the following in **Section Properties** section and click **OK**.

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

6. Move to **Visualforce Pages** using the scroll bar.



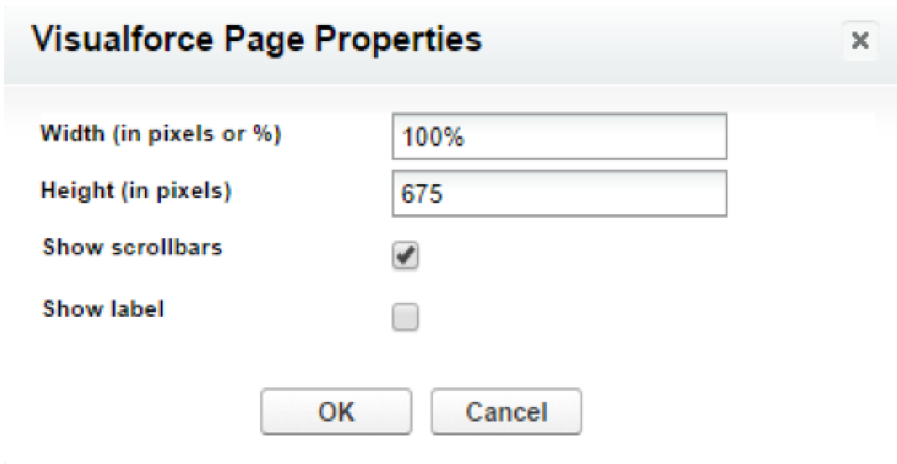
7. Drag one of these pages into the new **LinkedIn Member Profile** section:

- **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 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: Previously, there were 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. Click **Save** at the top of the page to save changes to the **Lead** or **Contact** page layout(s).

Important: Repeat steps 1-12 for all the other page layouts.

4.1.2 Enable Apex Class Access and Add Visualforce Pages (Optional)

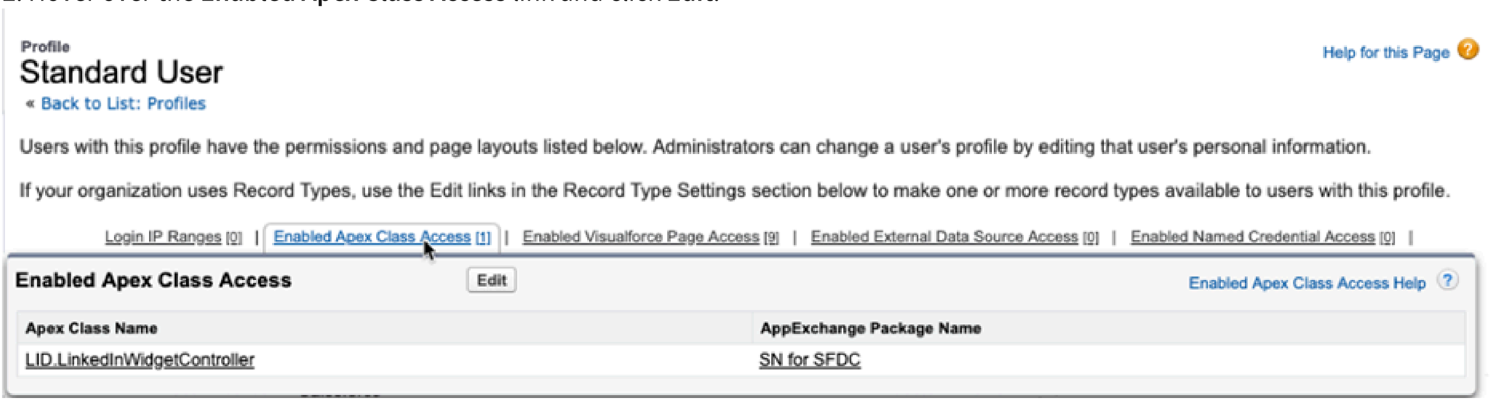
If you did not grant access to all users in the installation step, you'll need to enable Apex Class Access and add Visualforce pages to the specific profiles you'd like to be able to access the application.

Important: To enable Apex Class Access and to add Visualforce pages, you'll need to add all packages that start with LID.

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

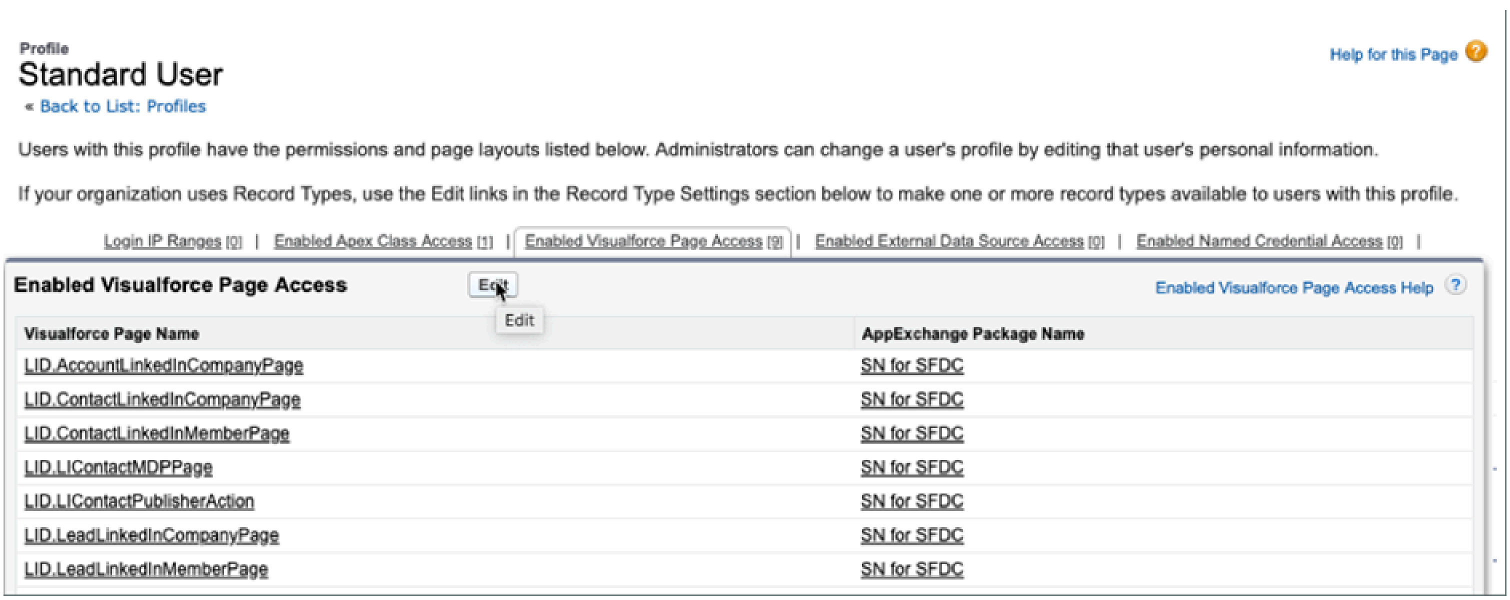
1. Go to **Setup > Administer > Manage Users > Profiles** and click the profile for which you want to enable access to the app.

2. Hover over the **Enabled Apex Class Access** link and click **Edit**.



3. From the **Available Apex Classes** list, select all that start with LID, add them to the **Enabled Apex Classes** list, and select **Save**.

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



5. From the **Available Visualforce Pages** list, select all that start with LID, add them to the **Enabled Apex Classes** list, and select **Save**.

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

4.1.3 Assign permission sets

The **LinkedIn Sales Navigator Standard User** permission set must be assigned to any non-system admin that will need access to the LinkedIn Sales Navigator: Company Profile component and the Linkedin Sales Navigator: Member Profile component.

To assign permission sets to your users:

1. Navigate to **Setup > Manage Users > User > Permission Set**.

2. Select the **LinkedIn Sales Navigator Standard User** permission set.

3. Click **Manage Assignments > Add Assignments**.

4. Assign the permission set to all users who need access to the app.

For more information, please refer to Salesforce documentation on Permission Sets.

5. LinkedIn Sales Navigator Embedded Profiles Testing

To test the app:

1. Navigate to your **Contacts** homepage and click any desired contact record, after adding Sales Navigator embedded profile to these page layouts.

2. Test the changes you've made to the pages and confirm the embedded profile is added correctly.

3. Repeat Step 2 for Leads, Accounts, and Opportunities, if you've added the Sales Navigator embedded profile to those pages as well.

Notes:

- If you don't see the changes you have made, switch to a different browser and open the same contact record again to validate changes.
- If that doesn't resolve the issue, navigate back to setup, and validate that each layout was saved and activated.
- When viewing the App for the first time, you'll be prompted to log into your LinkedIn profile. Your LinkedIn login won't be required after your initial login. Your experience
- will match the initial images at the beginning.
- For further assistance, contact LinkedIn Sales Solutions support https://www.linkedin.com/help/sales-navigator

6. Additional Resources

After completing the procedures outlined in this document, you can proceed to enabling CRM Sync from within the Sales Navigator Admin settings. You can find further information here: **Sales Navigator CRM Sync & Activity Writeback for Salesforce**.

CRM Sync expands the integration and supports direct linking between the platforms, auto-saving of key Leads/Accounts, writing-back of Sales Navigator Actions into your CRM, and ensures you're ready for future features that will require sync to function.

Additional references:

- **LinkedIn Sales Navigator Help**
- **Technical Implementation and Security Whitepaper**