Oracle Fusion Cloud Sales Automation

How do I integrate LinkedIn with Oracle Sales?

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Contents

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1 Overview of LinkedIn and Sales Integration

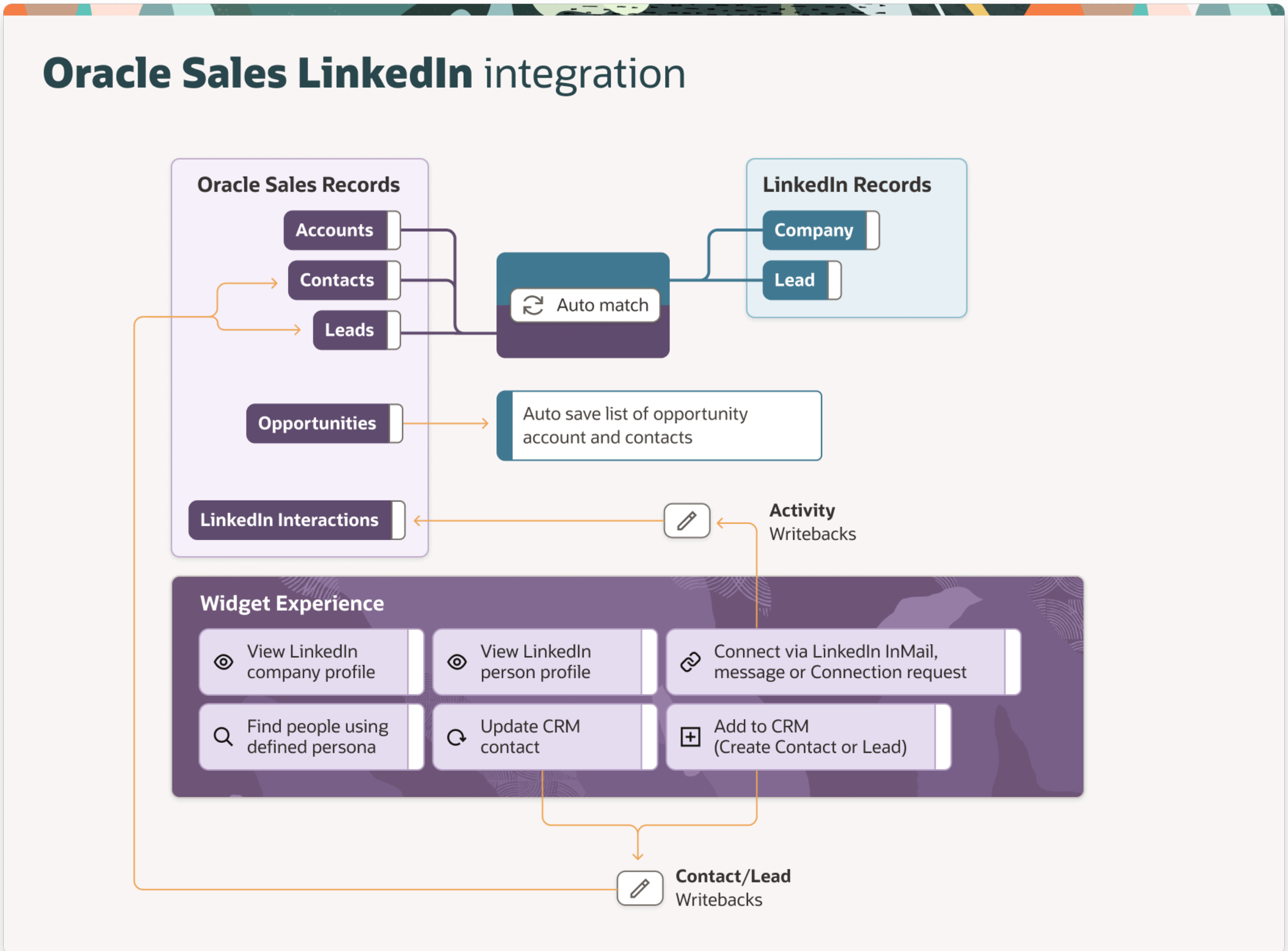
Integrating LinkedIn with Oracle Sales lets sales teams leverage social insights and improve their sales effectiveness.

Once you integrate LinkedIn with Oracle Sales, you can map sales accounts, contacts, and leads with LinkedIn profiles using the LinkedIn Sales Navigator.

As a salesperson, you can improve sale prospects by:

- Viewing the LinkedIn profile of a contact
- Getting introduced to the contact
- Connecting with the contact by sending InMails or messages

This image shows some tasks you can perform after integrating LinkedIn with Oracle Sales.


Oracle Sales LinkedIn integration
Oracle Sales Records
Accounts
Contacts
Leads
Opportunities
LinkedIn Interactions
Auto match
LinkedIn Records
Company
Lead
Auto save list of opportunity account and contacts
Activity Writebacks
Widget Experience
View LinkedIn company profile
View LinkedIn person profile
Connect via LinkedIn InMail, message or Connection request
Find people using defined persona
Update CRM contact
Add to CRM (Create Contact or Lead)
Contact/Lead Writebacks

You can sync Oracle Sales records such as accounts, contacts, and leads with LinkedIn profiles. You can view a person's LinkedIn profile and their company's profile that match your records in Oracle Sales using the LinkedIn Sales Navigator. You have the option to save the companies in lists to group them based on the business opportunities.

There maybe times when you don't have any contacts in a company or an industry but you plan to conduct business with that company or expand your business into that industry. The LinkedIn Sales Navigator helps you find profiles by specifying personas needed for your business and save them as leads or contacts. You can connect with any LinkedIn profile or send them a message on LinkedIn from Oracle Sales. You can enrich existing Oracle Sales data using the additional data from LinkedIn profiles.

The information and interactions returned from LinkedIn are called Writebacks and are saved in Oracle Sales as LinkedIn interactions. Writebacks can be activity writebacks, contact writebacks, or lead writebacks. Writebacks can be activity writebacks, contact writebacks, or leads writebacks. All these interactions are saved in Oracle Sales as LinkedIn interactions.

What can you do after completing the integration?

After you have completed the integration steps detailed in this playbook, you can:

- Auto match contacts and accounts with LinkedIn profiles
- View LinkedIn person and company profile in context of account, contact, lead, or opportunity
- Add contacts or leads to Oracle Sales
- Update contact information
- Connect with leads or contacts through LinkedIn InMail, message, or connection request
- Save your list of opportunities and contacts

2 Integrate LinkedIn with Oracle Sales

This section helps you to get started with the integration of Oracle Sales with LinkedIn.

Prerequisites

You need these prerequisites to successfully integrate LinkedIn with Oracle Sales:

Here's what to do

- Oracle Sales subscription
- LinkedIn Advanced Plus license
- An active LinkedIn account

Users and Roles

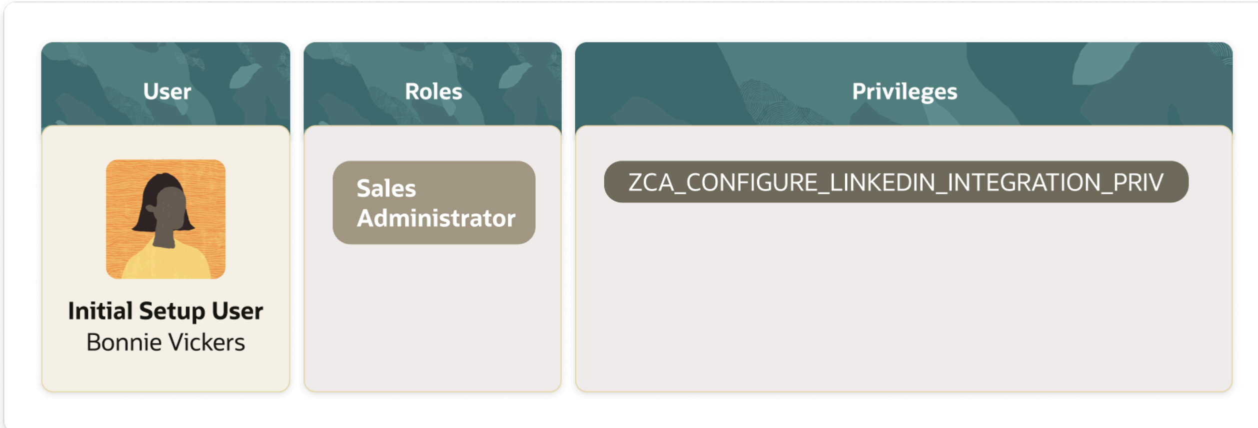
You require these roles and privileges for setting up the LinkedIn integration with Oracle Sales:

Here's what to do

- Role:
  - Sales Administrator

- Privilege:

- ZCA_CONFIGURE_LINKEDIN_INTEGRATION_PRIV



Set Up Data Sharing Options

This topic discusses the profile options required for setting up data sharing with LinkedIn.

Here is the list of profile options and their purpose:

- ZCA_LINKEDIN_EXPORT_LIMITS: setting up the default limits for data sharing with LinkedIn.
- ZCA_LINKEDIN_POST_BATCH_SIZE: setting the limit for each batch size while sharing data with LinkedIn.
- ZCA_LI_LOG_PAYLOAD_SIGNATURE: enabling logs while sharing data with LinkedIn.
- ZCA_ASSOCIATE_LI_INTERACTION_TO_ACCOUNT: Opting in for account interactions.
- ZCA_ASSOCIATE_LI_INTERACTION_TO_OPTY_LEAD: Opting in for opportunity interactions.

Here is how you setup these profile options:

1. Navigate to **Navigator** > **My Enterprise** > **Setting and Maintenance** work area.
2. Click the Tasks menu and click **Search**. Search for **Manage Profile Options** task and open it.
3. In the Search Results section, click **Actions** > **New**.
4. Specify the profile option code and a name.
5. Select Common CRM as Application and Module.
6. Specify a start date.
7. Click **Save and Close**.

Repeat the steps for all required profile options.

Set Up the LinkedIn Application

You setup the LinkedIn application in the Application Composer for all the objects such as accounts, contacts, leads, and so on.

1. Click **Navigator** > **Configuration** > **Application Composer**.
2. Click LinkedIn Sales Navigator.
3. In the Setup LinkedIn Integration page, click **Start**.
4. Click **Create Application** and click **Continue**.
5. Select the objects that you want to share with LinkedIn on the Specify Integration Options page.

   For more informaton about the objects and their attributes that can be shared with LinkedIn, see *Attributes Shared With LinkedIn*
6. Click **Connect** under Connection Status to login into your LinkedIn profile, and connect to Oracle Sales.
7. In the LinkedIn login page, specify the LinkedIn Sales Navigator credentials.
8. Click **Accept and Continue**.
9. Click **Continue**.

   The Select Dataset for Matching page lets you select dataset information.
10. Review the filter conditions for each object to filter the records that you want to fetch from LinkedIn.
11. Click **Edit** for each object for which you want to edit the filter conditions and click **Save**.

Here are some examples of filter conditions:

Object	Category	SQL
Account	WHO Columns	`CreationDate >= '2025-01-01' AND PromotedFlag=true`
		`LastUpdateDate>='2024-02-28'`
		`LastUpdateDate>='2025-01-28'`
		`CreationDate >= '2025-01-28'`
	Child Object	`Address.Country='US' AND AccountRollup.NumberOfOpenOpportunities>1`
		`Address.Country IN ('GB','CA')`
	Custom Attributes	`OrganizationDEO_CustomDate_c>='2024-01-01' AND OrganizationDEO_CustomFCL_c='NON_COMPLIANT'`
	Direct Attributes	`PartyId IN ('4784')`
		`PartyNumber IN ('3175')`
Contact	WHO Column	`CreationDate >= '2025-01-01'`
		`LastUpdateDate>='2024-02-28'`
		`LastUpdateDate>='2025-01-28'`
		`CreationDate >= '2025-01-28'`
	Child Object	`Address.Country='US' AND AccountRollup.NumberOfOpenOpportunities>1`
		`Address.Country IN ('GB','CA')`
	Custom Attributes	`PersonDEO_CustomDate_c>='2024-01-01' AND PersonDEO_CustomFCL_c='NON_COMPLIANT'`
	Direct Attributes	`PartyId IN ('4784')`
		`PartyNumber IN ('3175')`
Opportunity	WHO Columns	`CreationDate >= '2025-01-01'`
		`LastUpdateDate>'2025-01-01'`
	Direct Attributes	`LookupCategory='OPEN'`

Object	Category	SQL
		`LookupCategory='OPEN' AND EffectiveDate between '2025-01-01' and '2025-03-01'`
		`OptyNumber IN ('CDRM_149548')`
Lead	WHO Columns	`CreationDate >= '2025-01-01'`
		`LastUpdateDate>'2025-01-01'`
	Direct Attributes	`StatusCode='UNQUALIFIED'`

12. Repeat steps 10 and 11 for each object.
13. Click **Done**.

Verify Your LinkedIn Integration Setup

Perform these steps to verify if the LinkedIn integration setup was successful.

1. Click **Navigator** > **Configuration** > **Application Composer**.
2. Click LinkedIn Sales Navigator.

   The Setup LinkedIn Integration UI page is displayed.
3. Click Start.
4. Click Continue.

   The Specify Integration Options page is displayed.
5. Scroll down and verify if the Connected button is in green.

Attributes Shared With LinkedIn

The following list of attributes is shared with LinkedIn using the Export Data to LinkedIn scheduled process. The attributes are selected based upon dataset filter you specified when you *Set Up the LinkedIn Application*.

Accounts

Enable the profile option for sharing accounts with LinkedIn as described in the *Set Up Data Sharing Options* topic. The following attributes of Accounts are shared with LinkedIn:

Object	Attributes
Account	Party Number
	Last Update date
	Owner Party Number

Object	Attributes
	Organization Name
	City (Primary Address)
	Country
	State/Province
	Address 1
	Address 2
	Address 3
	Address 4
	Postal Code
	Employees Total
	Raw Phone Number(Primary)
	Primary Industry
	Stock Symbol
	URL (Primary)
	Creation Date

Contact

The following attributes of Contact are shared with LinkedIn:

Object	Attributes
Contact	Party Number
	Last Update date
	Owner Party Number
	Account Party Number(Primary)
	Person First Name
	Person Name
	Person Last Name
	Email Address (Primary- Non PII)
	Job Title

Object	Attributes
	City (Primary Address - Non PII)
	Country
	State/Province
	Address 1
	Address 2
	Address 3
	Address 4
	Postal Code
	Department
	Raw Phone Number(Primary)
	Creation Date

Opportunity

Enable the profile option for sharing opprtunities with LinkedIn as described in the *Set Up Data Sharing Options* topic. The following attributes of Opportunity are shared with LinkedIn:

Object	Attributes
Opportunity	Opportunity Number
	Last Update date
	Revenue Amount Currency Code
	Owner Party Number
	Account Party Number
	Opportunity Status Category
	Opportunity Name
	Opportunity Type Code
	Revenue Amount
	Opportunity Stage Name
	Opportunity Effective Date / Close date
	Creation Date

Leads

The following attributes of Leads are shared with LinkedIn:

Object	Attributes
Lead	Primary Contact Number
	Last Update date
	Owner Party Number
	City
	Country
	State / Province
	Address 1
	Address 2
	Address 3
	Address 4
	Postal Code
	Customer Name
	Email Address
	Contact First Name
	Contact Last Name
	Contact Name
	Job Title
	Phone Number
	Creation Date

User

The following attributes of User are shared with LinkedIn:

Object	Attributes
User	Party Number
	Last Update date
	Person Name
	Person First Name

Object	Attributes
	Person Last Name
	Email Address
	Creation Date

Opportunity Contact

The following attributes of Opportunity Contact are shared with LinkedIn:

Object	Attributes
Opportunity Contact	Contact Party Number
	Opportunity Number
	Last Update date

Account User

Object	Attributes
Account User	Owner Party Number
	Account Party Number
	Last Update date

Opportunity User

The following attributes of Opportunity User are shared with LinkedIn:

Object	Attributes
Opportunity User	Owner Party Number
	Opportunity Number
	Last Update date

Push Data to LinkedIn Application

You can use the Export Data to LinkedIn scheduled process to push data to the LinkedIn application.

1. Click **Navigator** > **Tools** > **Scheduled Processes**.
2. On the Scheduled Processes Overview page, click **Schedule New Process**.
3. Type **Export Data to LinkedIn** and click **OK**.
4. Click **OK**.

   The Process Details page is displayed.
5. Select one of the following options of the Process Mode.

   The option you select for the Process Mode determines the selections of the remaining parameters.
   - One time load: To export all required records to LinkedIn for the first time. It can be submitted with or without additional Date Filters (like changed record or new records).
   - Incremental load: To export updated account, contact, opportunity, or leads records to LinkedIn. Use this option while scheduling incremental uploads.
   - Recover mode: To export or resend data that failed to upload to LinkedIn because of API rate limit errors.
6. Click **Submit**.

Results:

For more information about this scheduled process, see the Export Data to LinkedIn topic in the Understanding Scheduled Processes guide.

Enable Smart Actions

Before you enable smart actions in Application Composer, you must create a sandbox. To enable smart actions:

1. Click **Navigator** > **Configuration** > **Sandboxes**.
2. Click **Create Sandbox**.
3. Specify a name and select Application Composer under All Tools. Also select the Publishable option as **Yes**.
4. Click **Create and Enter**.
5. Click **Tools** > **Application Composer**.
6. Click **Smart Actions**.
7. Search for LinkedIn task in the smart search box.
8. Perform the following actions based on your requirements
   - Predefined smart actions: Select Yes under the Enabled column for each of the following objects and their respective smart actions that you plan to use:
     - Account
       - Show LinkedIn Company Profile
       - Search People on LinkedIn
     - Accounts- Contacts
       - Send LinkedIn Message
       - View LinkedIn Profile
       - Connect on LinkedIn
     - Contact
       - Send LinkedIn Message

        - Show LinkedIn Company Profile
        - Show LinkedIn Profile
        - Connect on LinkedIn
        - Show Related Leads from LinkedIn
    - Opportunity
        - Show LinkedIn Company Profile
        - Search People on LinkedIn
    - Opportunity - Opportunity Contact
        - Send LinkedIn Message
        - View LinkedIn Profile
        - Connect on LinkedIn
    - Sales Lead
        - Send LinkedIn Message
        - Show LinkedIn Company Profile
        - Show LinkedIn Profile
        - Connect on LinkedIn
        - Show Related Leads from LinkedIn
- Custom smart actions: We recommend that you duplicate an existing smart action of the required object type to help ensure that the mappings are correct. After duplicating, delete the existing module and select the required module. Here is the list of objects, their smart action, and the modules that must be selected:

Object	Smart Action	Module
Account	Show LinkedIn Account IQ	TopCard
	Show LinkedIn Connections	Connections
	Show LinkedIn News	News
	Show LinkedIn Relationship Map	Maps
Contact	Show LinkedIn Recent activities and highlights	RecentActivity, Highlights

9. Publish the sandbox.

   You can verify that the smart actions are enabled by going to the Accounts, Contacts, Leads, or Opportunities page and searching for the LinkedIn smart actions.

   Note: Ensure that you have disabled popup blockers on your browser for your application.

Opt-In to Share Data

You may want to opt in or opt out of sharing accounts or opportunities data with LinkedIn at any time after the integration.

Here's how you do it:

1. Click **Navigator** > **My Enterprise** > **Setup and Maintenance** work area.
2. Click the Tasks menu and click **Search**. Search for Manage Administrator Profile Values task and open it.
3. Search using the following profile option codes and set their value to Y:
    - ZCA_LINKEDIN_ENABLE_OPTY_USER to enable sharing opportunities team data with LinkedIn
    - ZCA_LINKEDIN_ENABLE_ACCT_USER to enable sharing accounts team data with LinkedIn
4. Click **Save and Close.**

3 Use the LinkedIn Sales Navigator

You are now ready to:

- View and work with LinkedIn company profiles
- Work with LinkedIn interactions
- Connect or send LinkedIn messages to profiles

But before you try performing any of these actions, make sure that you have the LinkedIn premium account credentials.

How do I view and work with LinkedIn company profiles?

Here's how you view and work with a company profile on LinkedIn using the Sales Navigator:

1. Go to **Navigator** > **Redwood Sales** > **<item>**.
   Here item can be Accounts, Contacts, Opportunities, or Leads.
2. Click the required item from the list of records.
3. Search for Show LinkedIn Company Profile using the search bar.
   Profiles that match the selected item are displayed. If no matches are found, the popup displays the search criteria that you can modify to find matches.

   > **Note:** If you can't find any smart action using search, verify that you have enabled them. For more information, see the *Enable Smart Actions* topic.

4. For the required profile, click **Match** to view the profile details.
   The company profile details are displayed on the popup.

   > **Note:** When you use this feature for the first time, you must log in with your LinkedIn premium account credentials.

5. (Optional) You can save the profile to a list by clicking Save to list. You can save it to an existing list or create a list and then add the company profile to the new list. Click Save and then Done.
6. You can perform any of the following actions on the company profile details popup:
   - Click the Find People tab to view the personas that match your criteria. You can edit the personas search criteria.
   - View or update the hierarchy using the Relationship Map tab.
   - Connect to the company's employees using the Connections tab.

How do I work with LinkedIn interactions?

Here's how you track and record your LinkedIn interactions:

1. Go to **Navigator** > **Redwood Sales** > **<item>**.
   Here item can be Accounts, Contacts, Opportunities, or Leads.
2. Click the required item from the list of records.
3. Search for Show Interactions using the search bar.

   > **Note:** If you can't find any smart action using search, verify that you have enabled them. For more information, see the *Enable Smart Actions* topic.

4. Click Edit under the Actions column to view and add notes to the summary of interaction with the LinkedIn profile associated with the selected item.
5. Optionally, Click **Web Activities and Messages** to view the history of interactions with the LinkedIn profile associated with the selected item.

How do I connect or send LinkedIn messages to profiles?

Here's how you connect or send LinkedIn messages to the contacts associated with your account or opportunity:

1. Go to **Navigator** > **Redwood Sales** > **<item>**.
   Here item can be Accounts, or Opportunities.
2. Click the required item from the list of records.
3. Search for Show Contacts using the search bar.
   The list of contacts associated with the selected item are displayed.

   > **Note:** If you can't find any smart action using search, verify that you have enabled them. For more information, see the *Enable Smart Actions* topic.

4. Select Send LinkedIn Message option from the Actions column of any contact.

   > **Note:** You can also use the Connect on LinkedIn option to connect with a LinkedIn contact.

1. Here's how you connect or send LinkedIn messages to contacts or leads:

1. Go to **Navigator** > **Redwood Sales** > **<item>**.
   Here item can be Contacts, or Leads.
2. Select Send LinkedIn Message option from the Actions column of any contact.

> **Note:** You can also use the Connect on LinkedIn option to connect with a LinkedIn contact.