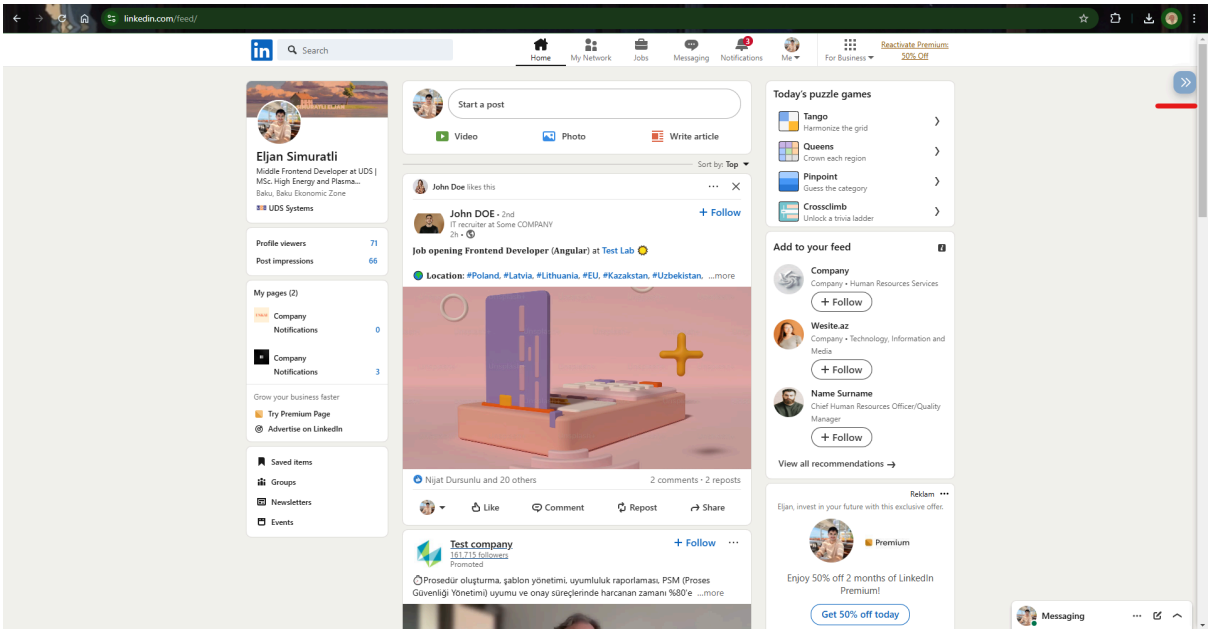


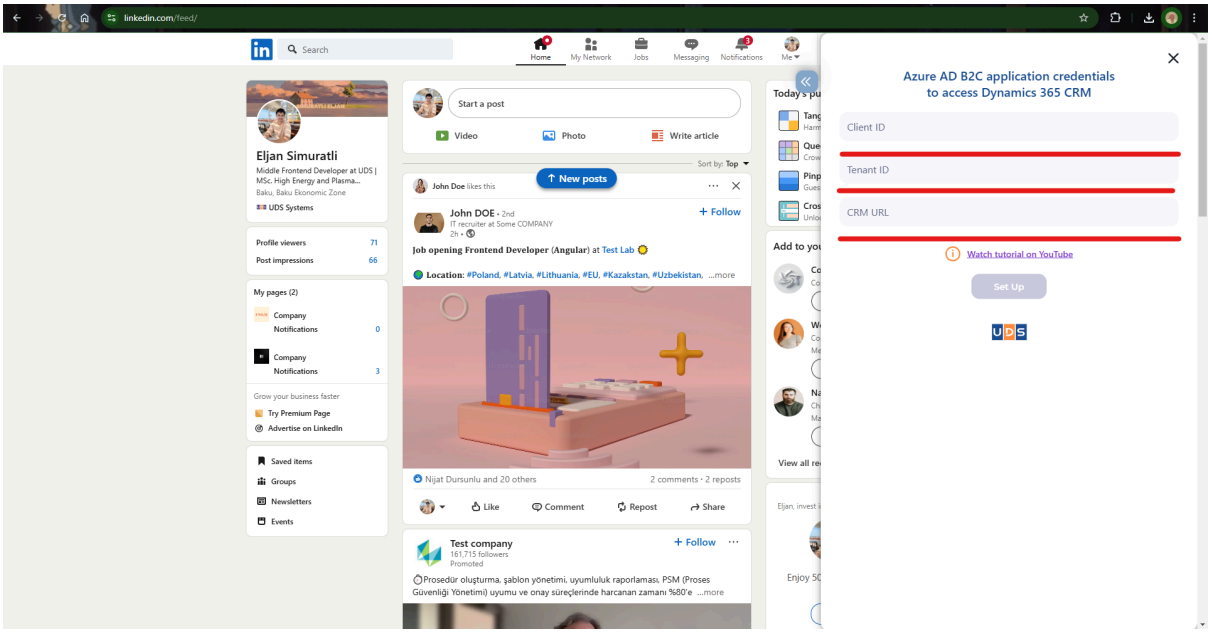
Linkedin Extension Documentation

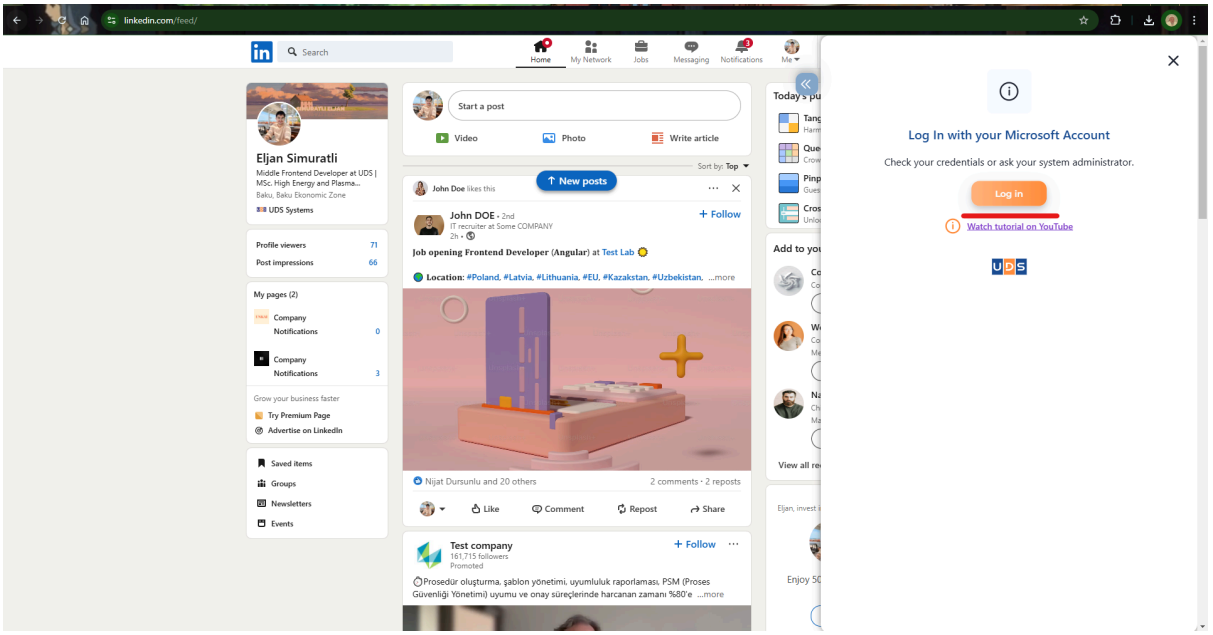
1.1 Login

After installing the UDS LinkedIn extension, open linkedin.com (or reload the page if it is already open). You will see an arrow button on the left side. Click this button to open our tool, which will display a login form.

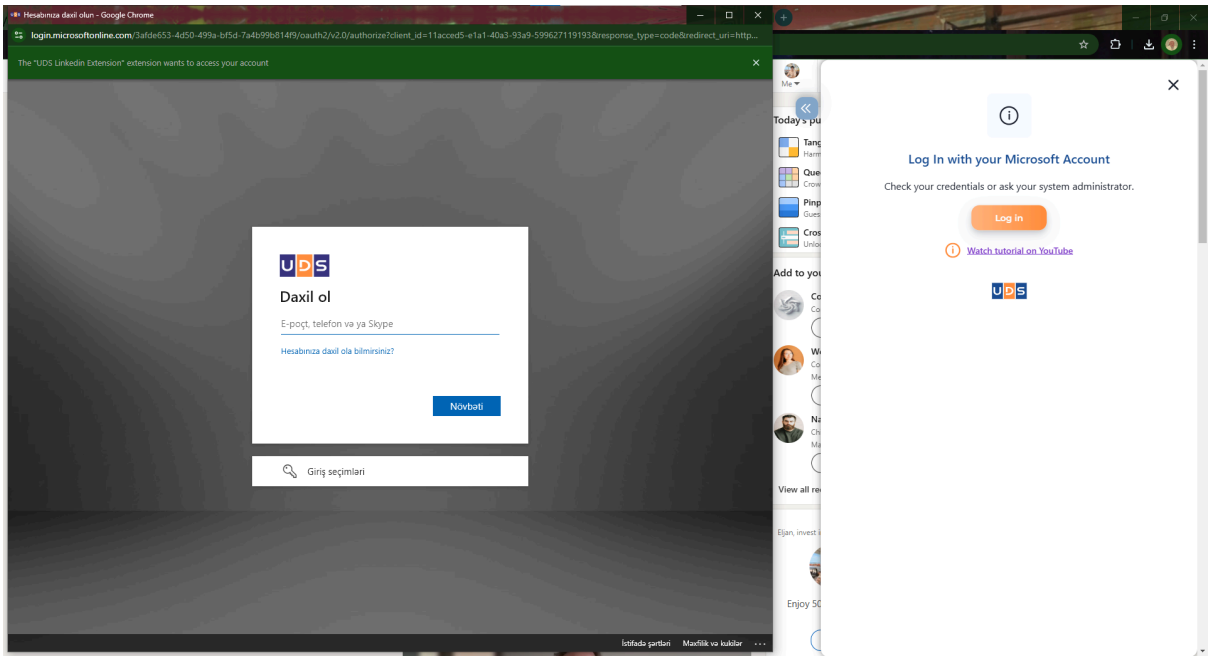


In this form, you need to enter the Tenant ID, Client ID, and CRM URL, which can be obtained from the Azure portal.

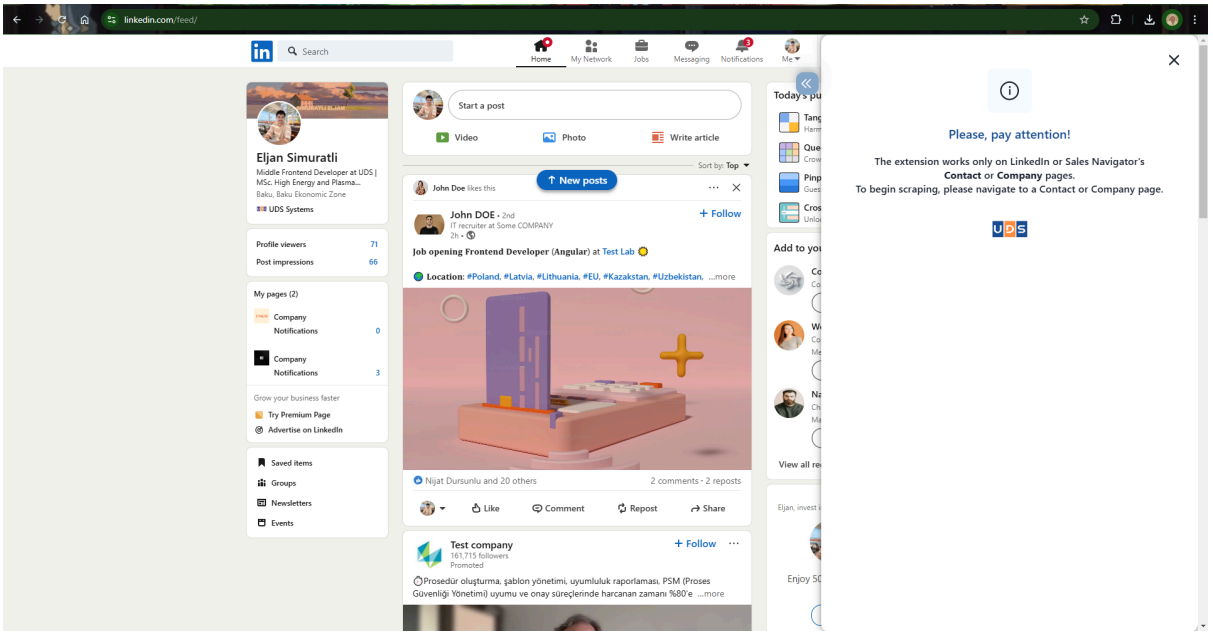




After entering these credentials, click the **'Set Up'** button. You will then see an informative screen with a **'Login'** button. Click the **'Login'** button to open a new window, where you can enter your email and password to log in.

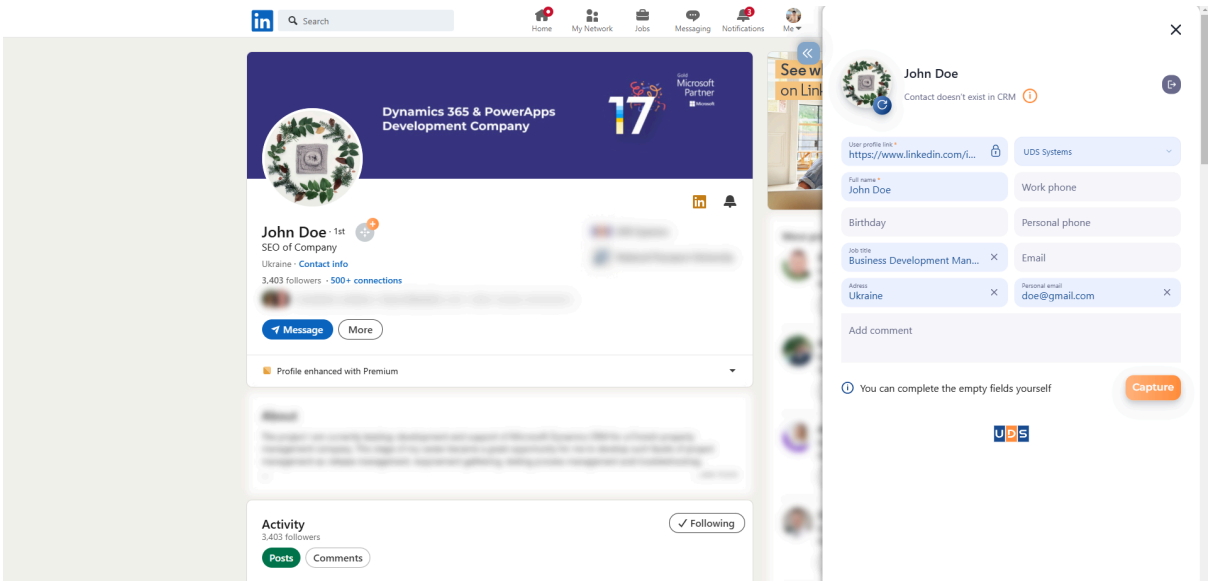


After logging into our extension, if your credentials are correct, you will see a message screen (whether you are on the LinkedIn feed page or another page) that guides you on which pages are available for use.

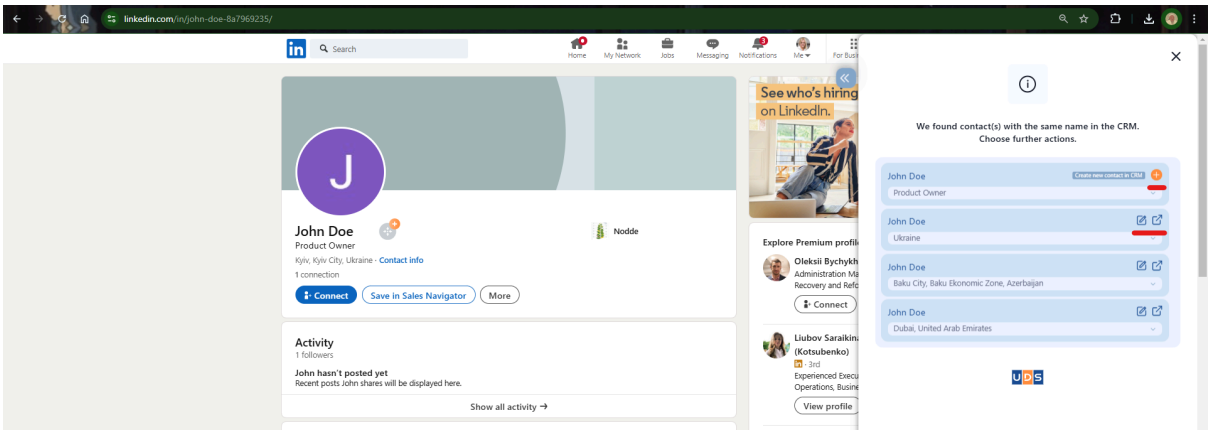


1.2 User Profile Scraping on LinkedIn

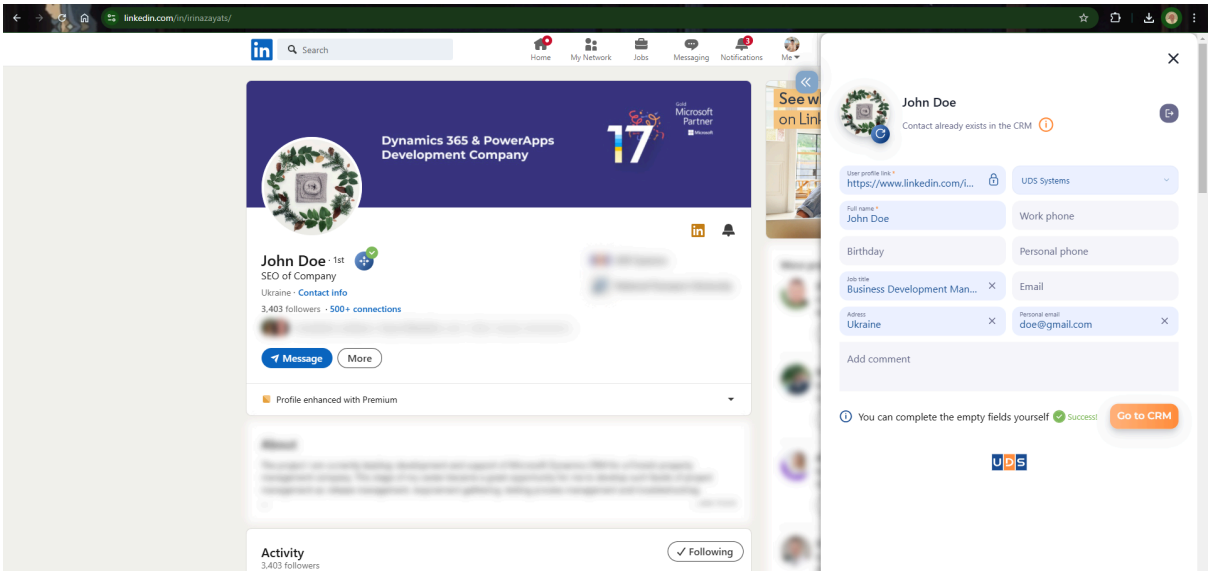
On the User Profile page, you will see two icons: the first is an arrow icon on the right side of the screen, and the second is located near the user's name. You can click either icon to open the same page displaying user details. If no matching user exists in your backend (identified by a unique URL parameter), a form will appear with the user's details for capture. You can edit these details and click the 'Capture' button to save them to your database.



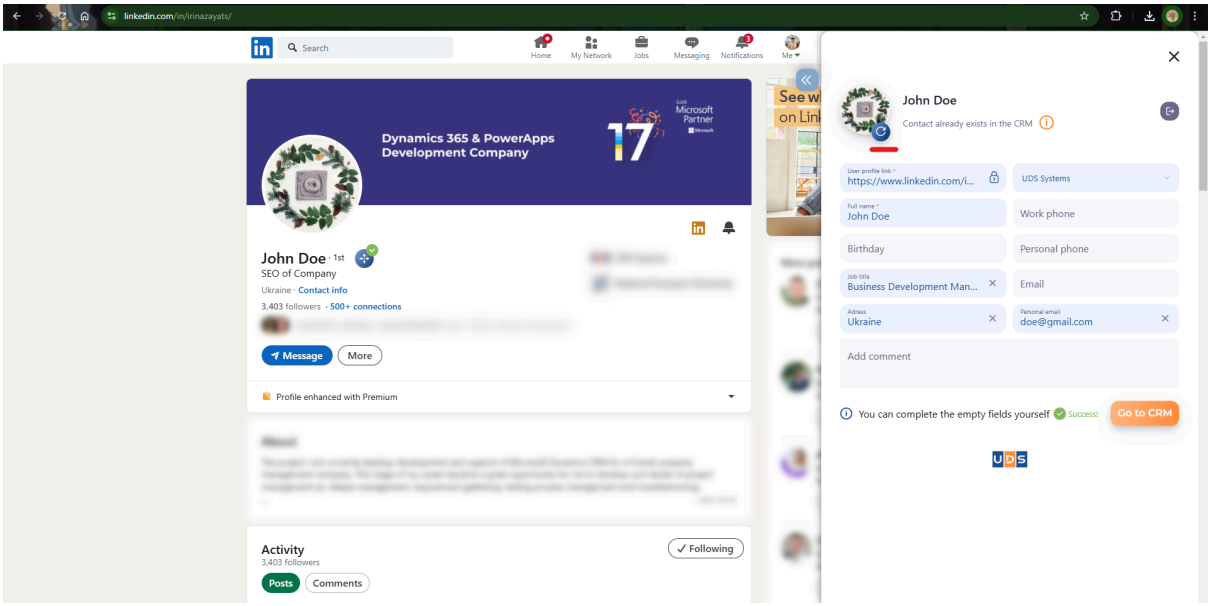
If the user is not unique but has similar names in the backend, the 'Select User' page will open. From there, you can click the '+' button to create a new user, select the edit icon to modify an existing user and save it as new, or click the redirect button to view the existing user in your system.

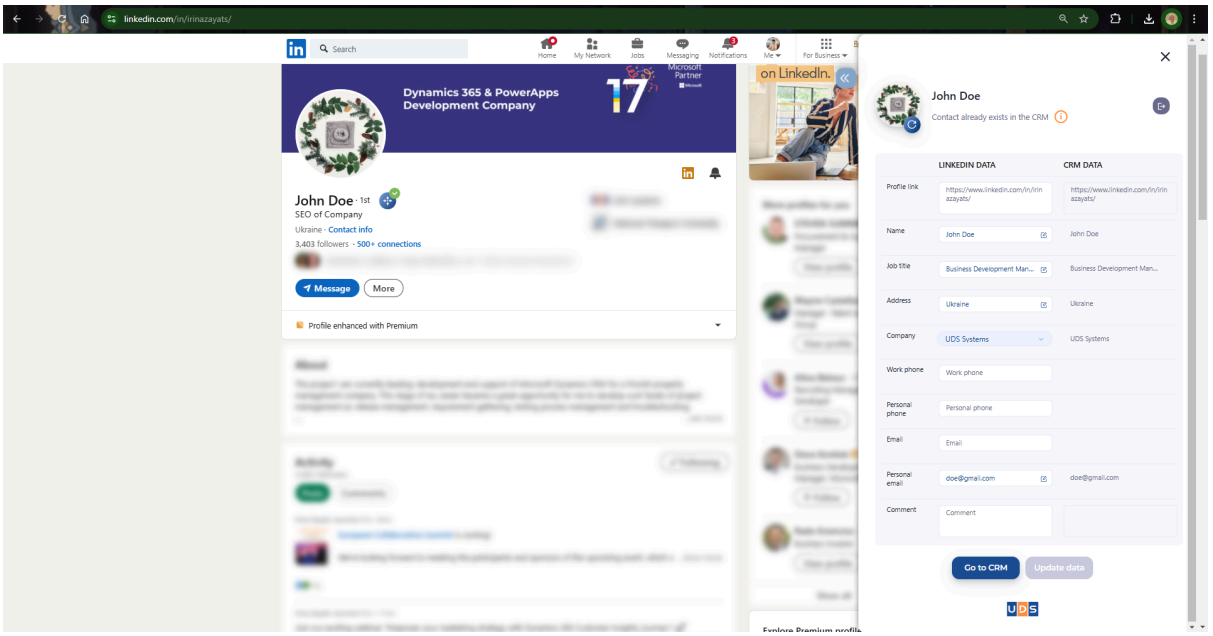


After clicking 'Capture,' the user will be saved in your backend. You will then see a 'Go to CRM' button, which redirects you to your CRM to view the created user.

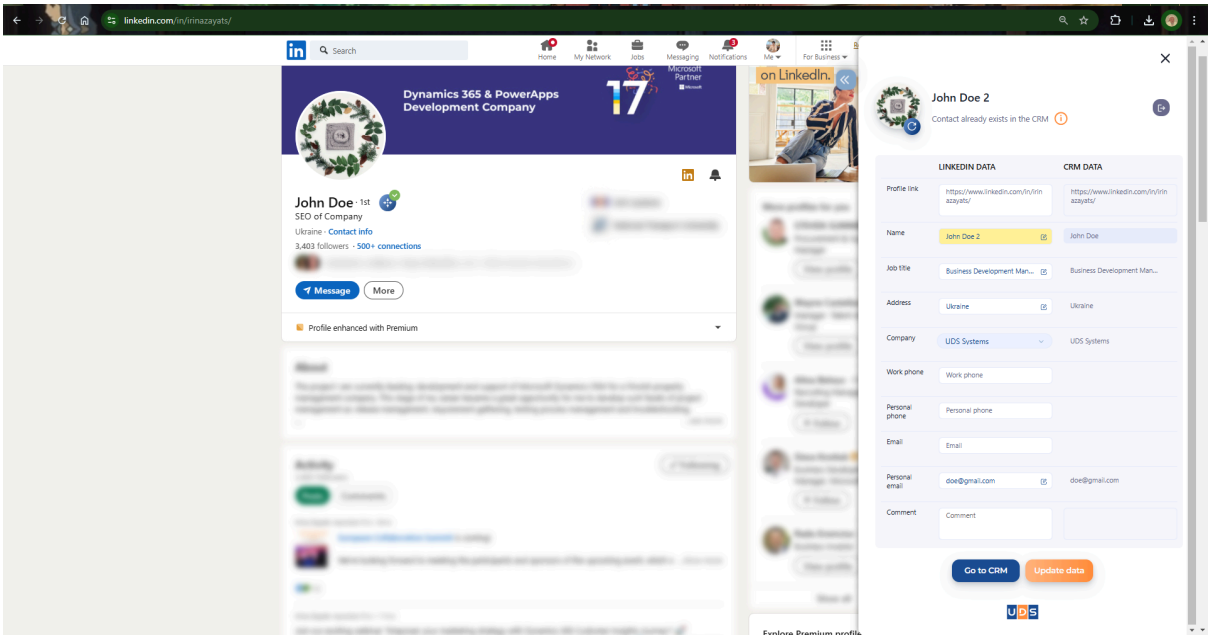


Near the profile image, there is a reload button that allows you to reset your edits or, after creating a user, reload to view the existing user table.

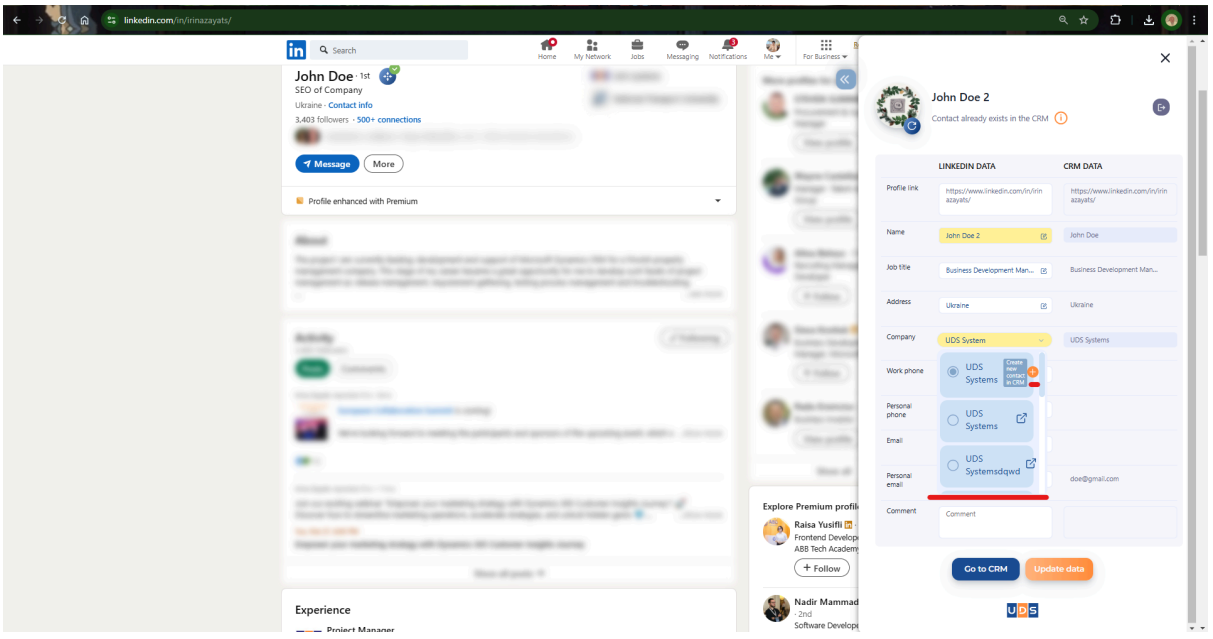




In the Existing User table, you can edit values. If the edited values differ from the backend data, they will be highlighted in yellow, and the 'Update' button will be enabled.

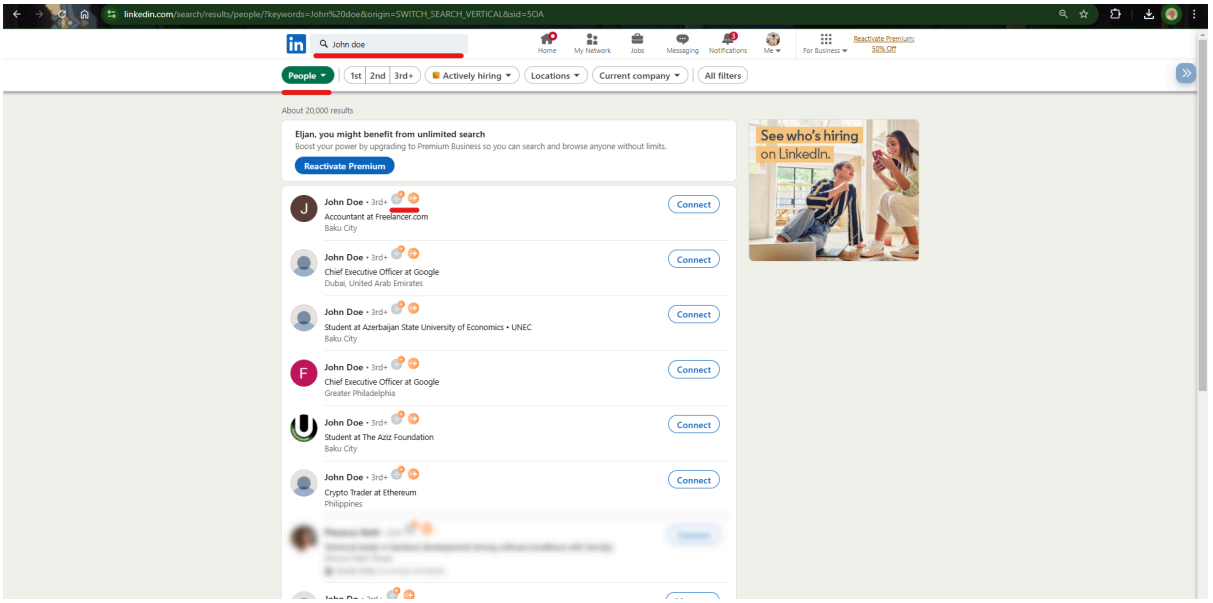


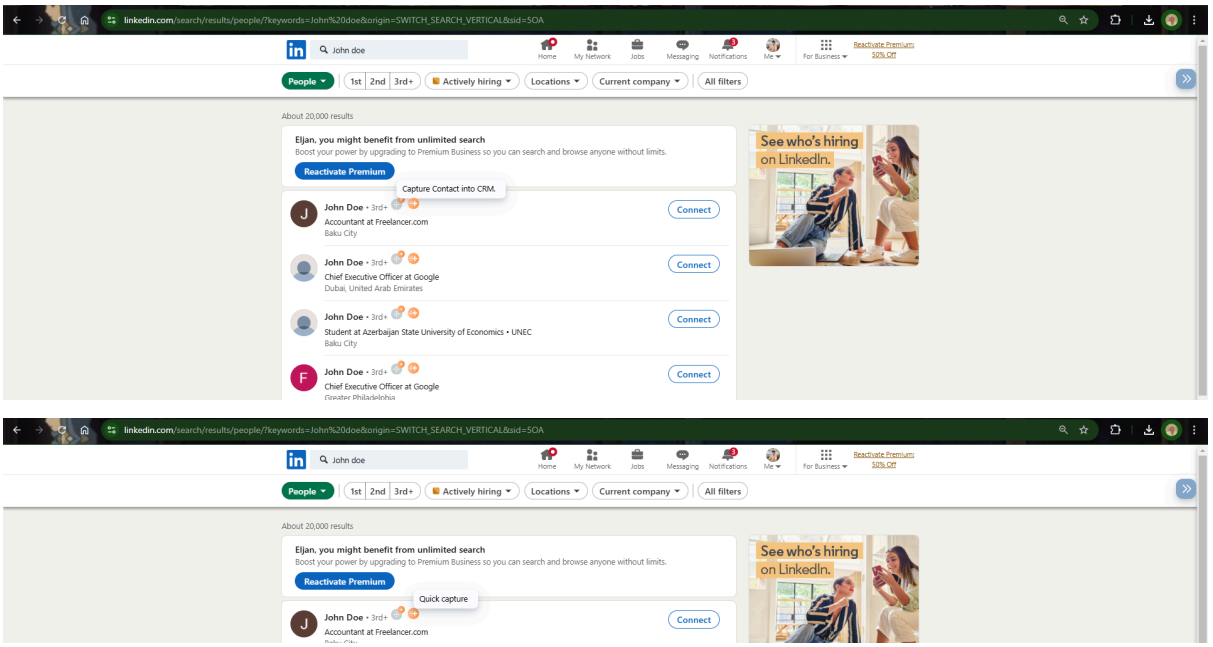
You can also edit the user's company details. You can select an existing company from your list or type a new company name to create one. When you click 'Update,' if the company does not exist in your backend, the company will be created first, and then it will be assigned to the updated user.



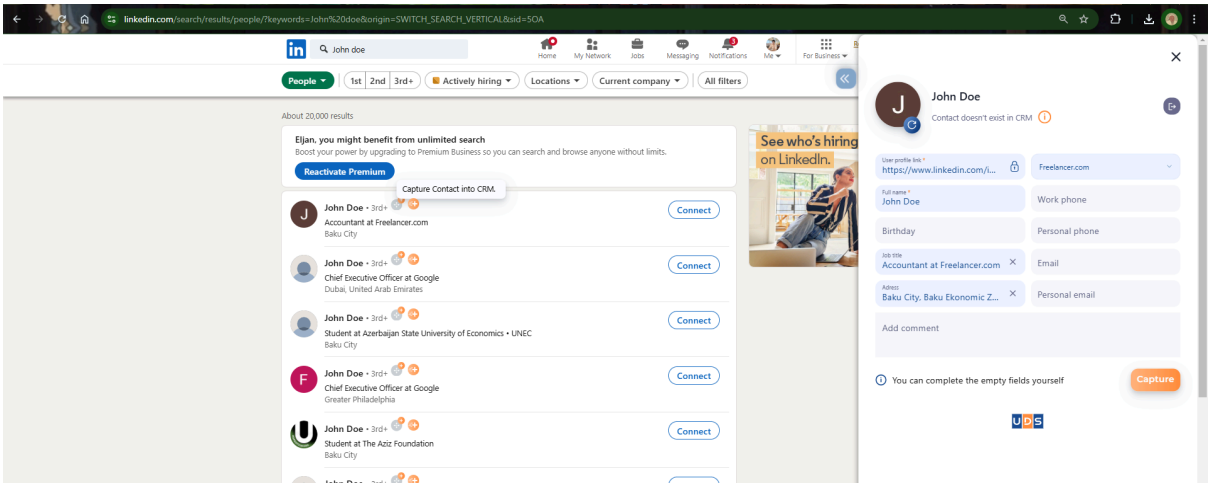
1.3 People Search Scraping on Linkedin

In our extension, you can speed up your work by scraping users from the LinkedIn search page. To do this, select the 'People' option in the search. If you areq logged in, you will see the ‘**Capture details’** and ‘**Quick Capture’** icons.

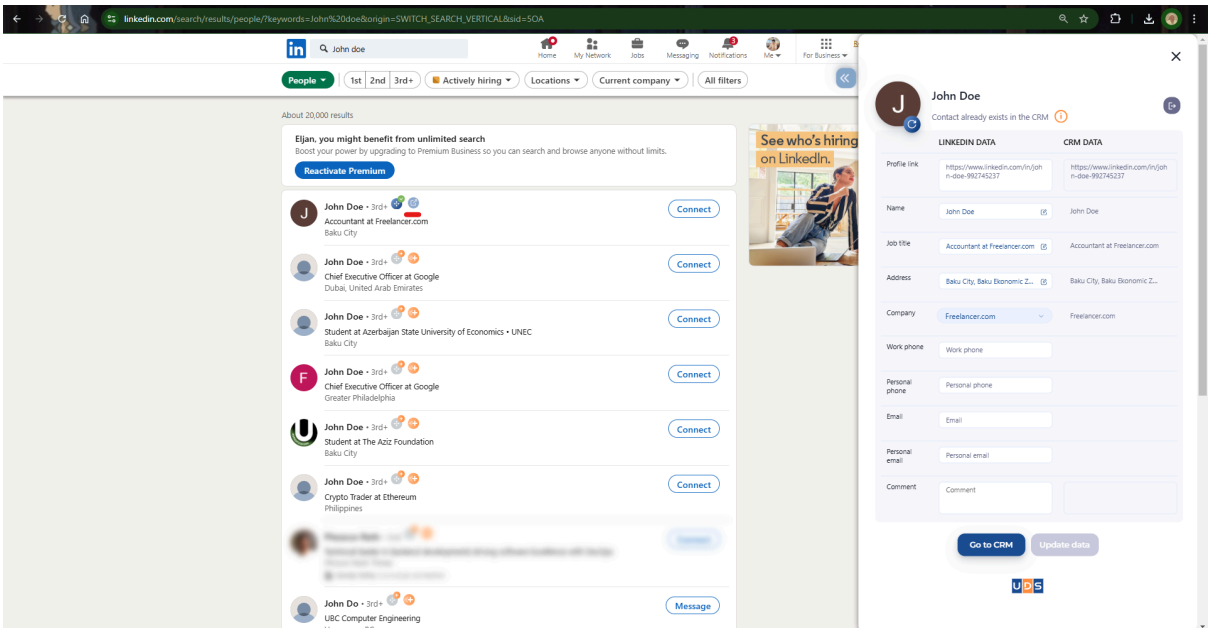




If you click the 'Capture' button, a form with the user's values will open. You can modify these values and save them to your CRM.



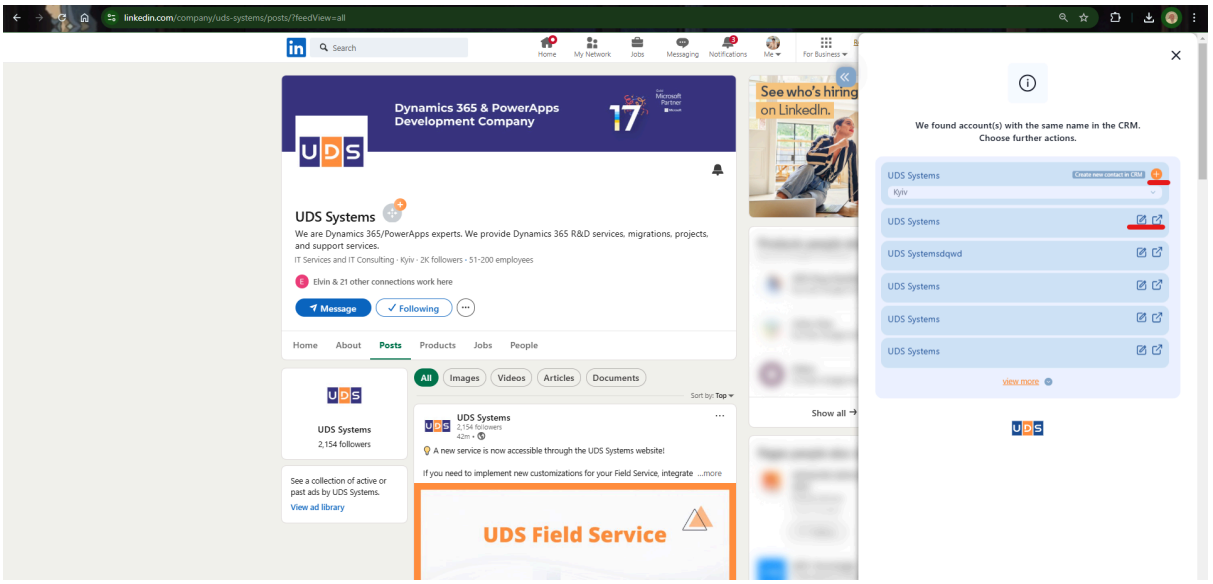
However, no form will open when you click the 'Quick Capture' button; the user is automatically saved to your CRM quickly.
After saving the user details to your CRM, or if the user already exists in your CRM, you will also see a 'Redirect' button to navigate directly to the specific user in your CRM.

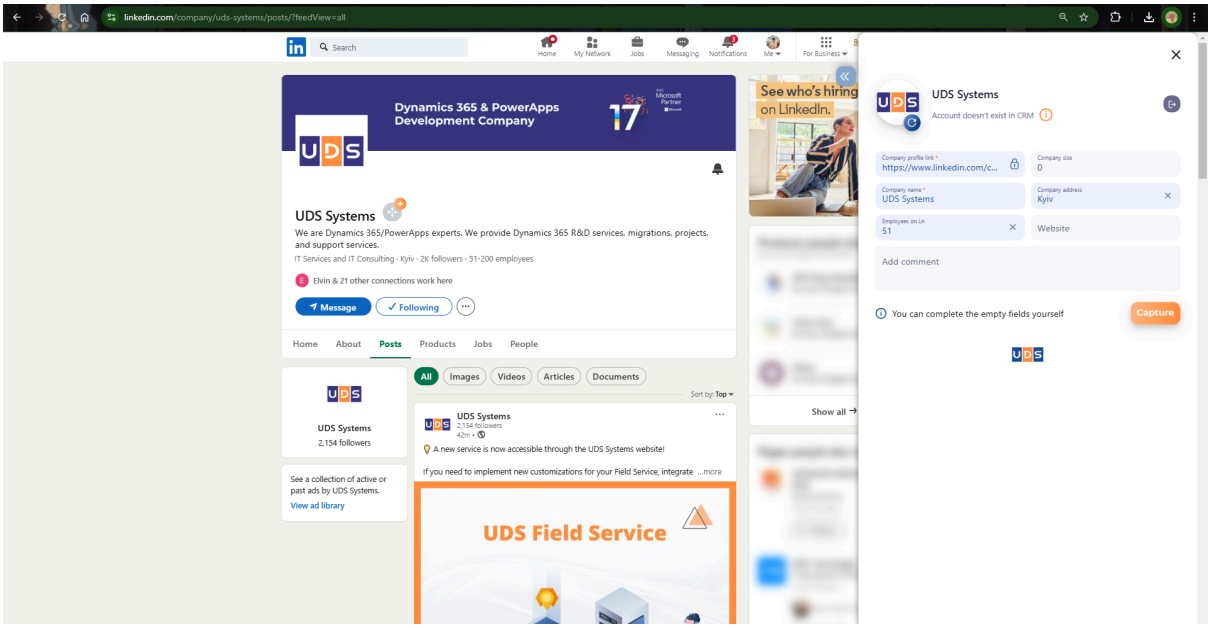


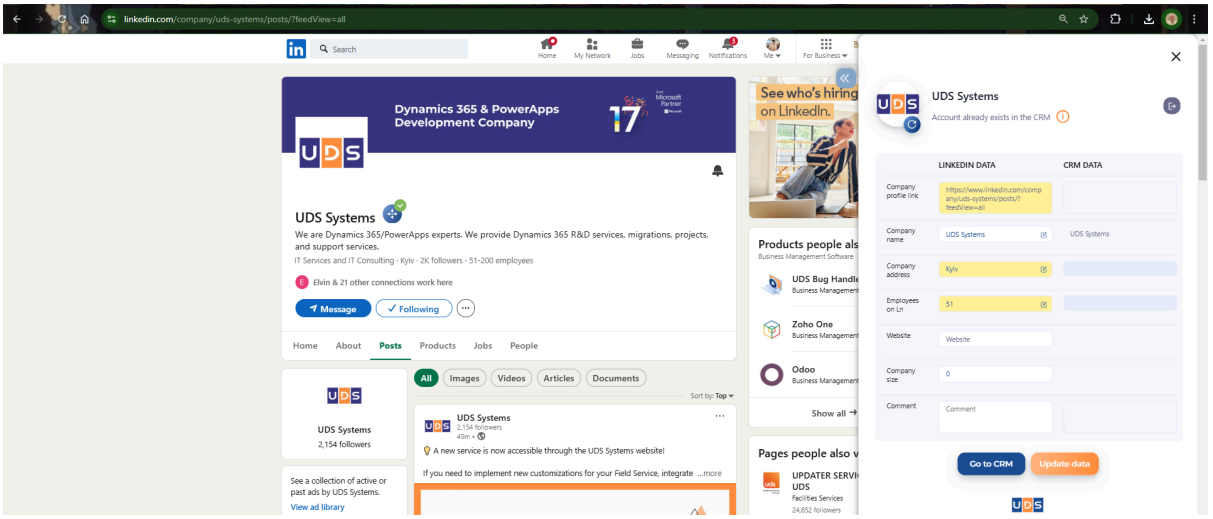
1.4 Company Scraping on Linkedin

For capturing a company, every step and process is the same as user capturing. If a company's name has similar matches and no unique ID in your CRM, a

'Select Company' page will appear. Here, you can either select one to edit and save or click the '+' button to create a new company in your CRM.

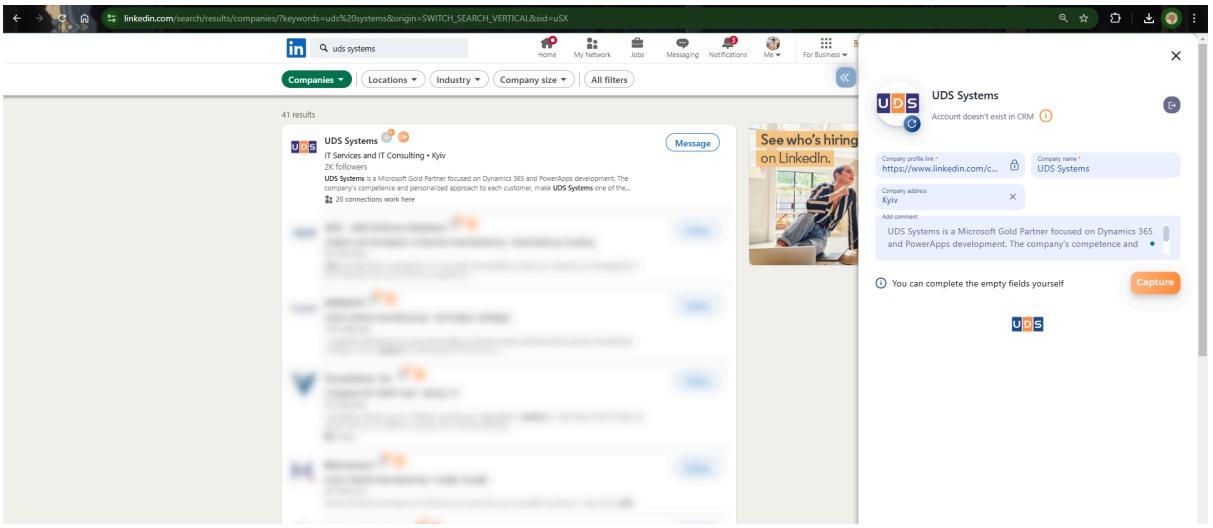






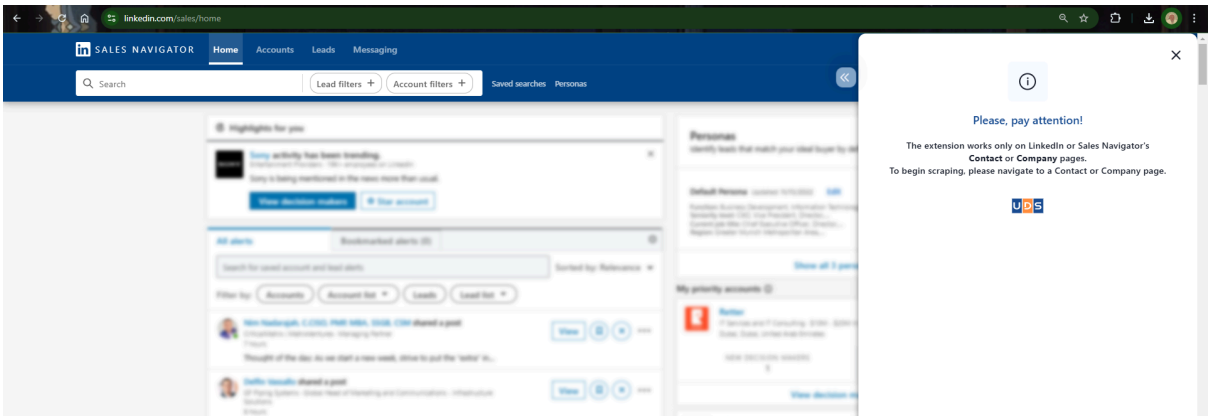
1.5 Company Search Scraping on Linkedin

You can also capture companies during company search. To do this, select 'Companies' while searching, and you will see the same icons: **'Quick Capture'** and **'Capture Company Details'** near the company capture option.



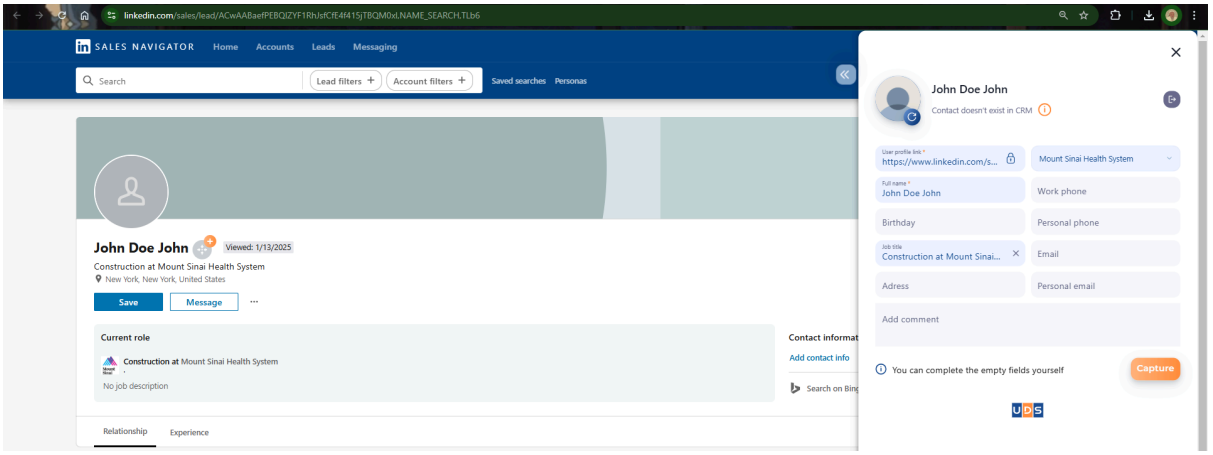
2.0 Sales Navigator Scraping

After logging into our extension, if your credentials are correct, you will see an informational message when you open Sales Navigator (whether you are on the feed page or another page). If you are already logged in, the message will guide you on which pages are available for use. If your credentials are incorrect, the message will notify you of the issue.



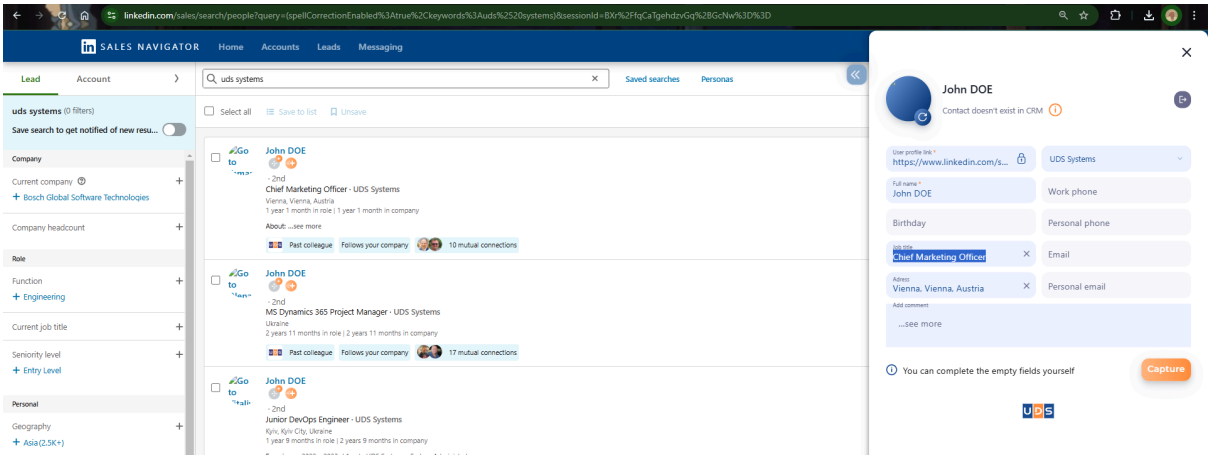
2.1 Sales Navigator User Scraping

When you open a user, you will see a 'Capture' button. When you click it, a form with the user's details will appear, allowing you to either edit the details or simply capture them.



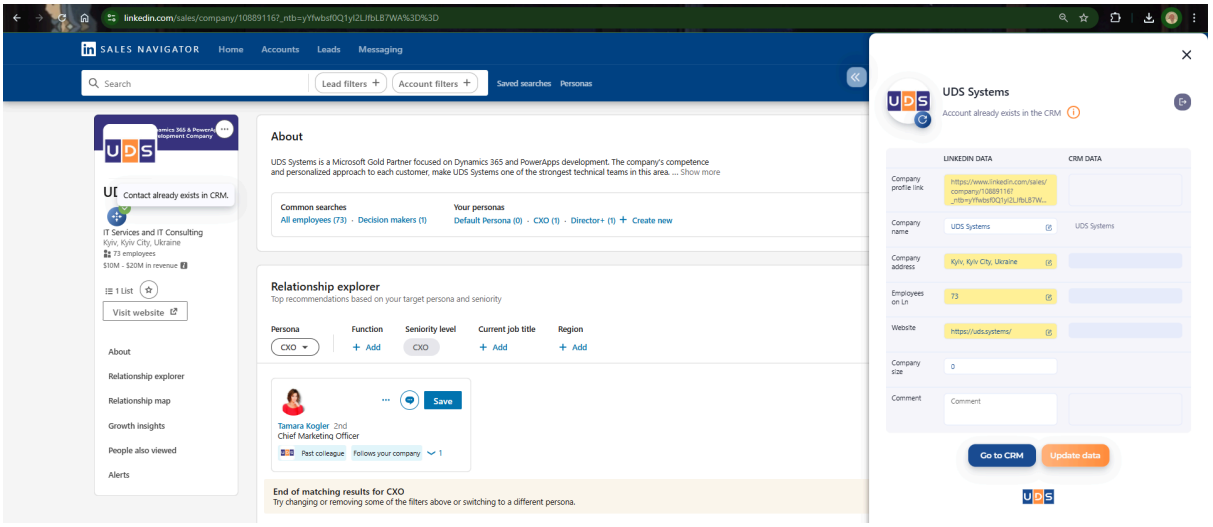
2.2 Sales Navigator User Search Scraping

When you search for a user in Sales Navigator, select the 'Lead' tab. You will see the same icons as in LinkedIn user search: 'Quick Capture' and 'Capture Details.' If you select 'Capture Details,' you can edit the details, or you can click 'Quick Capture' for a faster process.



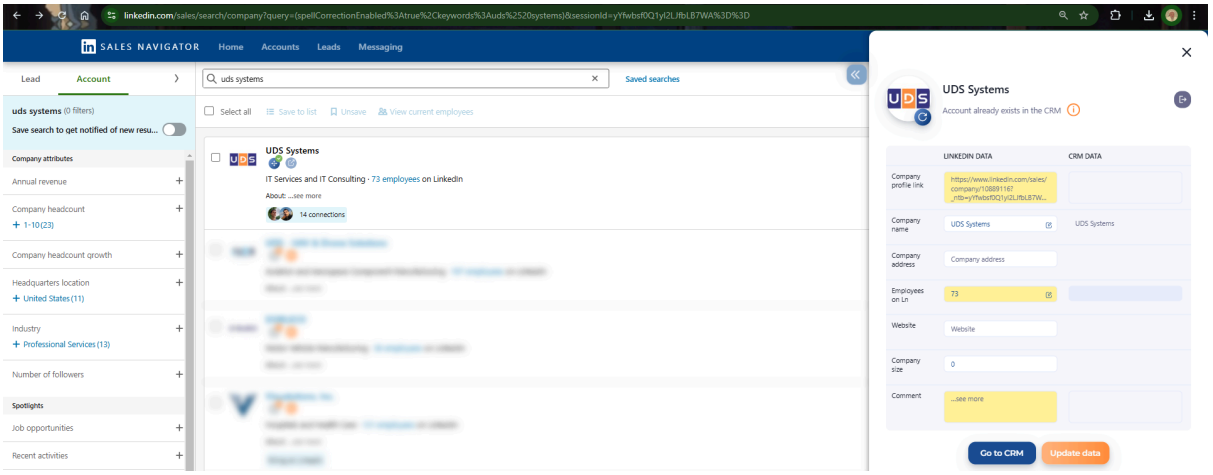
2.3 Sales Navigator Company Scraping

When you open a company, you will see a 'Capture' button. When you click it, a form with the company's details will appear, allowing you to either edit the details or simply capture them.



2.4 Sales Navigator Company Search Scraping

When you search for a company in Sales Navigator, select the **Account** tab. You will see the same icons as in the LinkedIn company search: **'Quick Capture'** and **'Capture Company Details.'** If you select 'Capture Company Details,' you can edit the details, or you can click **'Quick Capture'** for a faster process.



Note:

Before using it, you need to implement these fields in your Dynamics 365 CRM: [Download]