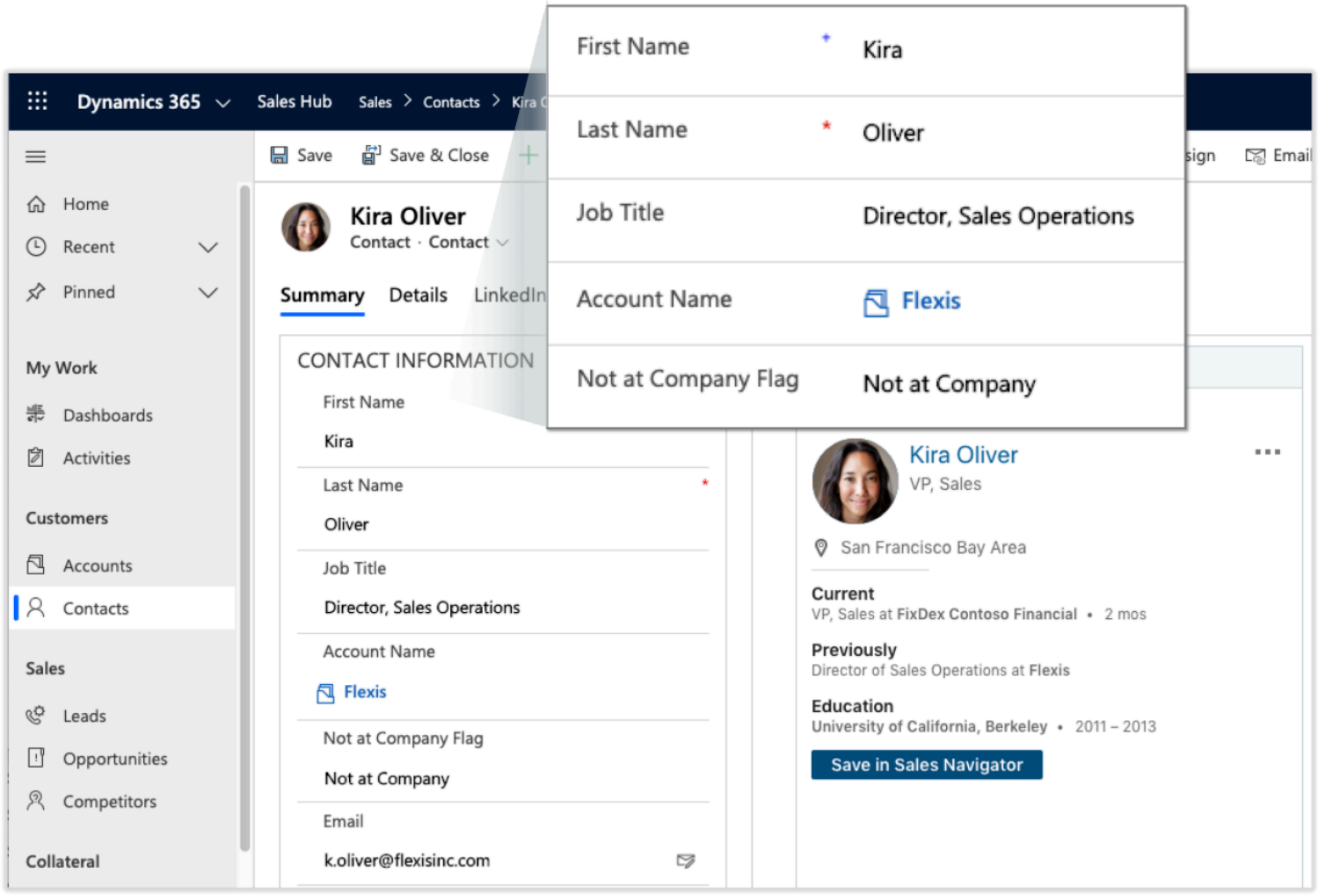
Sales Navigator Data Validation for Microsoft Dynamics 365 Sales CRM

1. Introduction

When you enable Data Validation post CRM sync, the contacts and accounts in your CRM are verified with the respective LinkedIn member and company profiles. Enabling Data Validation also creates a new custom field named **Not at Company Flag** under the **Contact Information** section in the CRM. When the details on the LinkedIn profiles don't match with that of the CRM records, **Not at Company** is auto-populated under the **Not at Company Flag** field. (refer to the screenshot below). If there's no mismatch found, the field displays **Null/No value**. This validation process occurs every 24 hours and updates the custom field accordingly.



2. Prerequisites

Ensure that you meet the below requirements to enable the Data Validation functionality:

- Sales Navigator installed for Microsoft Dynamics 365 Sales (Review the steps for installation **here**.)
- CRM sync must be enabled. (Review the steps **here**.)
- Access to Sales Navigator Advanced Plus edition

3. Enable Data Validation

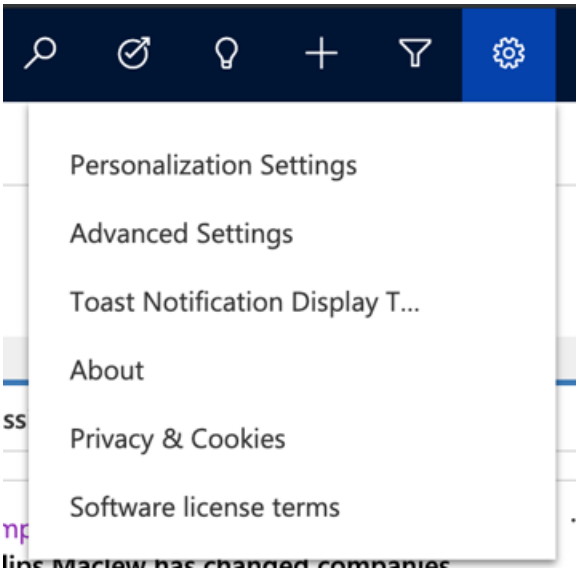
3.1 Settings for Microsoft Dynamics 365 Sales

Follow the steps below to configure the settings for Data Validation functionality:

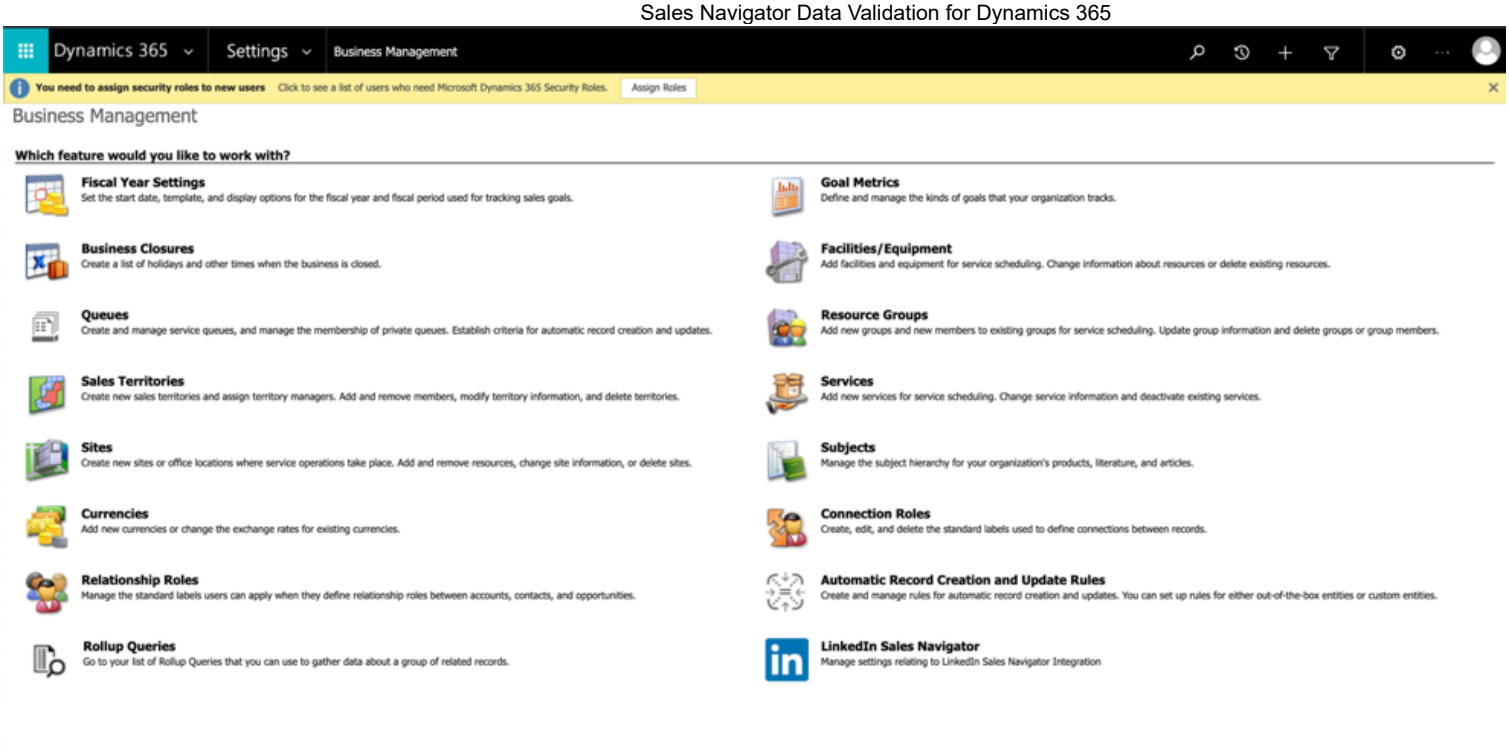
1. Log into Microsoft Dynamics 365 Sales as a CRM admin.

2. Click the **Settings** icon on the top right corner of the screen.

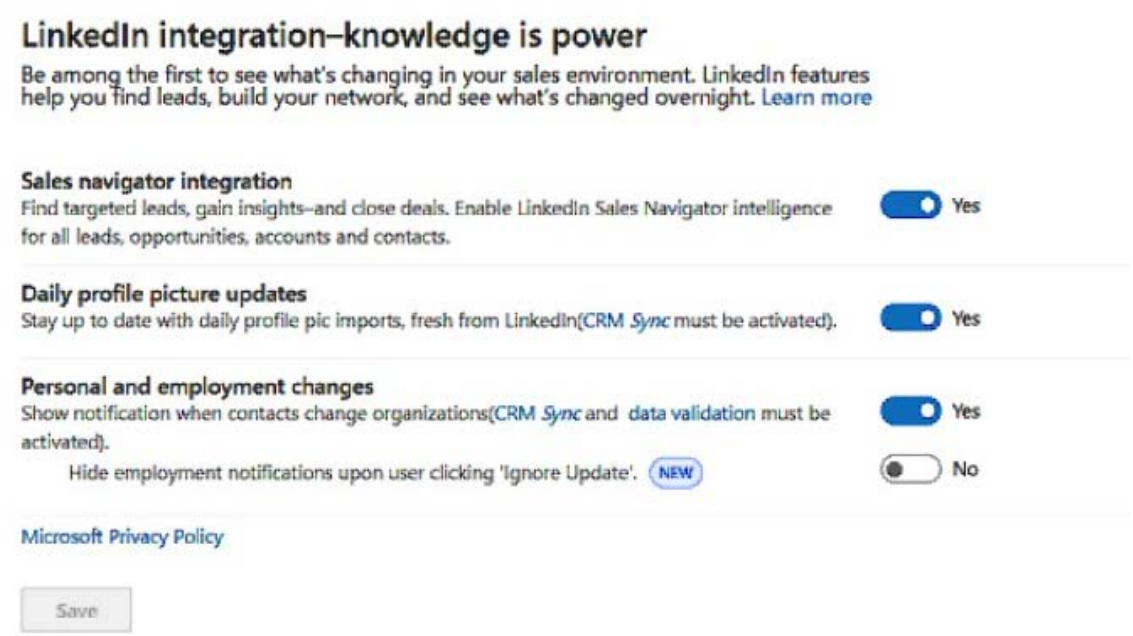
3. Select **Advanced Settings/Business Manager Settings** from the dropdown.



4. Click **LinkedIn Sales Navigator**.



5. In the **Sales Navigator Integration Settings** popup, turn on the toggle for all three sections.



Note: Enabling LinkedIn updates helps your CRM to support the Data Validation functionality.

6. Click **OK**.

3.2 Enable Data Validation in Sales Navigator

Follow the steps below to enable Data Validation functionality:

1. Log in to Sales Navigator as a Sales Navigator Administrator.

2. Click **Admin** > **Admin Settings**.

3. On the left rail, click **Production** in the **CRM** section.

4. On the left rail, click **Exported to CRM**.

5. In the Exported to CRM page, for the **Validate CRM Data** option, switch the toggle on or off to activate or deactivate data validation.

Data Validation is initiated within 48 hours and updates the Not at Company Flag field accordingly. You can also access and modify System Views.

4. Data Validation Features and Specifications

4.1 Applicable Contacts

Data Validation functionality works for the contacts that are:

- Owned by syncing Sales Navigator Advanced Plus users
- Related to accounts owned by syncing Sales Navigator Advanced Plus users
- Related to opportunities owned by Syncing Sales Navigator Advanced Plus users

4.2 System Views for CRM

LinkedIn Sales Navigator creates four System Views for CRM users to utilize, if desired:

System View	Description
• All Opportunities at Risk – Contact Left • My Opportunities at Risk – Contact Left	Identifies all open opportunities where a contact reflects **Not at Company** value in the **Not at Company Flag** field and the deal may be at risk.
• All Contacts Not at Company • My Contacts Not at Company	Identifies all Contacts with Not at Company value in **the Not at Company Flag** field.

CRM Admins will need to grant users access to these reports, if desired, using CRM

permissions.