



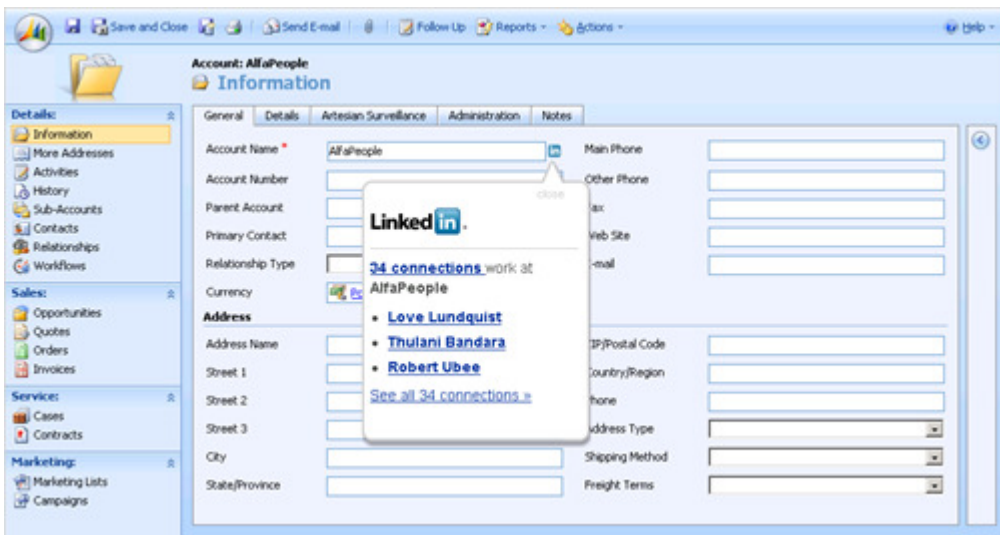
CRM Tips 'n' Tricks from Altico



There are dozens of little tips and tricks for using your Microsoft Dynamics CRM application that can make your life ever so much easier. We'll be bringing you a new tip every month in the hope that you find them useful.

The resident Altico wizard presents your August 2010 CRM tip:

Adding LinkedIn to Dynamics CRM



LinkedIn is the most successful professional social network with more than 60 million users worldwide. At the end of the last year LinkedIn opened up their API for developers allowing third parties to integrate the valuable information on their applications. The information contained in this social network is especially relevant when working with CRM applications. For example, it can be very useful to know what LinkedIn connections you have with prospects and clients.

As you can see in the above screenshot, you can display the LinkedIn company insider widget on the account form. This allows you to discover what connections you have with a given company and you can easily jump from the account screen to LinkedIn for more details.

The LinkedIn widget is attached as an icon next to the company name. When a user clicks on the icon a nice popup is displayed showing the LinkedIn connections with that company.

The code to achieve this is not too complicated. It just requires some minor adjustments to ensure proper visualization within the CRM form.

```
function LinkedInLoader(crmFormField) {
    var ll = this;
    ll.scriptSource = 'http://www.linkedin.com/companyInsider?script&useBorder=yes'
    ll.field = crmFormField;
    ll.container = crmFormField.parentNode;
    ll.nameToSearch = crmFormField.DataValue;
    ll.spanId = ll.field.id + '_linkedin';

    if (ll.container != null) {
        var span = document.createElement('span');
        span.id = ll.field.id + '_linkedin';

        var td1 = document.createElement('td');
        td1.innerHTML = ll.container.innerHTML;

        var td2 = document.createElement('td');
        td2.appendChild(span);
        td2.style.width = '15px';

        var tr = document.createElement('tr');
        tr.appendChild(td1);
        tr.appendChild(td2);

        var table = document.createElement('table');
        table.width = '100%';
        table.style.tableLayout = 'fixed';
        table.cellSpacing = 0;
        table.cellPadding = 0;
        table.appendChild(tr);

        ll.container.innerHTML = table.outerHTML;
    }

    ll.ApplyCorrections = function() {
        var div = document.getElementById('company-insider-info-window');
        if (div != null) div.style.height = '275px';
        else window.setTimeout(ll.ApplyCorrections, 500);
    }

    ll.Enable = function() {
        new LinkedIn.CompanyInsiderPopup(ll.spanId, ll.nameToSearch);
        new LinkedIn.CompanyInsiderStylesheet();
        var span = document.getElementById(ll.spanId);
        if (span != null) span.attachEvent('onclick', ll.ApplyCorrections);
    }

    ll.OnScriptReadyState = function() {
        if ((event.srcElement.readyState == 'complete') ||
```

```
(event.srcElement.readyState == 'loaded')) {
    ll.Enable();
}

ll.Load = function() {
    var script = document.createElement('script');
    script.type = 'text/javascript';
    script.src = ll.scriptSource;
    script.onreadystatechange = ll.OnScriptReadyState;
    document.getElementsByTagName('head')[0].appendChild(script);
}

if (crmForm.FormType != 1) {
    // Set the field that contains the company name
    var linkedInLoader = new LinkedInLoader(crmForm.all.name);
    linkedInLoader.Load();
}
```

This code works by getting the name of the company from the text field that you indicate when firing the LinkedInLoader script. So, make sure that you provide a valid CRM form text field.

* * *

I'm NOT the resident wizard, but be that as it may, you're welcome to channel your questions through me.

Yours,

Marcia Nita Doron
Marketing Director
Altico Advisors
225 Cedar Hill Street, Suite 331
Marlborough, MA 01752
508-485-5588 x107
mdoron@AlticoAdvisors.com
www.AlticoAdvisors.com