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# **MS CRM Gamification Tool**

## **LinkedIn Integration Setup Guide**

Microsoft Dynamics CRM 2011 Compatible



2245 North Green Valley Parkway, Suite 298,  
Henderson  
NV 89014  
Tel: +1 866 311-24-67

[www.wave-access.com](http://www.wave-access.com)

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## Overview

This document outlines the process of LinkedIn integration configuration and describes the Game functionality.

## Microsoft CRM Compatibility

MS CRM Gamification Tool is compatible with Microsoft Dynamics CRM 2011 online/on-premise/IFD.

## About MS CRM Gamification Tool and the Game

MS CRM Gamification Tool is CRM add-on that enables managers to increase user adoption and to motivate sales teams by adding game elements to everyday routine operations.

It is shipped with a special Game “How well do you know your customers?” that helps sales people learn information about their clients in a more efficient and entertaining way.

This game allows Gamification users to earn points when they answer questions about their customers. All questions and games are based on CRM data and completely customizable.



## Setup Instructions

Gamification Tool is integrated with LinkedIn, so if you register your CRM Organization as described below, your Gamification Users will be able to see LinkedIn Information (for example, LinkedIn pictures) when they play the Game.

To register your CRM Organization

1. Go to <https://www.linkedin.com/secure/developer>

### LinkedIn® DeveloperNetwork

#### List of Applications

You have not added any applications yet.

[Add New Application](#)

[« Back to LinkedIn Developer Network](#)

[LinkedIn.com Home](#) | [About](#) | [Blog](#) | [Careers](#) | [Advertising](#) | [Recruiting Solutions](#) | [Tools](#) | [Developers](#) | [Upgrade Your Account](#)  
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2. Click Add New Application
3. Sign in to your LinkedIn account
4. Fill in the form

### LinkedIn® DeveloperNetwork

#### Add New Application

Fill out the form to register a new application:

Company Info

\* Company Name:

Account Administrators: You will be assigned as an account administrator.

Additional Administrators:  
  
Administrators appearing here will be account administrators for all applications from this company. Administrators can edit application details and add/remove other administrators and developers.

Application Info

\* Application Name:

\* Description:

\* Website URL:   
Where your people should go to learn about your application.

\* Application Use:   
What best describes your application?

Application Developers:   
Network updates you send will appear only for developers you list.

☐ Include yourself as a developer for this application

\* Live Status:   
While in development, your network updates will only go to the developers you choose. When live, they will go to your connections.

Contact Info

\* Developer Contact Email:

\* Phone:

Business Contact Email:

Phone:

## OAuth User Agreement

Default Scope:

- |  |  |   |
|--|--|---|
| <input checked="" type="checkbox"/> r_basicprofile | <input type="checkbox"/> r_fullprofile | <input type="checkbox"/> r_emailaddress   |
| <input type="checkbox"/> r_network                 | <input type="checkbox"/> r_contactinfo | <input type="checkbox"/> rw_nus           |
| <input type="checkbox"/> rw_groups                 | <input type="checkbox"/> w_messages    | <input type="checkbox"/> rw_company_admin |

Selecting both r\_basicprofile and r\_fullprofile is redundant. r\_basicprofile will be selected if neither r\_basicprofile nor r\_fullprofile is checked.

OAuth 1.0 Accept Redirect

URL:

URL to return users to your app after they grant access. Only used if you do not pass in the oauth\_callback parameter in the requestToken call.

OAuth 1.0 Cancel Redirect

URL:

URL to return users to your app if they select Cancel from the OAuth dialog. If specified, this field will be used for the Cancel button redirect, otherwise the oauth\_callback will be used and will include the parameter oauth\_problem with the value user\_refused.

App Logo Secure URL:

URL of an 80x80 logo for your app. SSL is required.

\* Agreement Language:

Select the display language of the user agreement screen. Browser Locale Setting is recommended.

## Other

JavaScript API Domains:

Enter domain of your CRM organization

Comma separated list of fully-qualified domain name of all pages that will call the JavaScript API. Only needed if using Javascript API. Must include protocol, host, and port (it not 80 or 443).

## Terms of Service

\*Agree: ☒

I have read and agree to the [LinkedIn API Terms of Use](#).

**Add Application**

or Cancel

\* Indicates required information

5. Copy API Key and click Done.

## LinkedIn® DeveloperNetwork

✓ Your application was successfully created.

### Application Details

Company:

Test Company

Application Name:

Gamification Tool

API Key:

d1v15hr86pww

Secret Key:

UG5YybW1dsAnqf4J

OAuth User Token:

1ebffec9-0eed-45bb-be4e-aaabba7c20f6

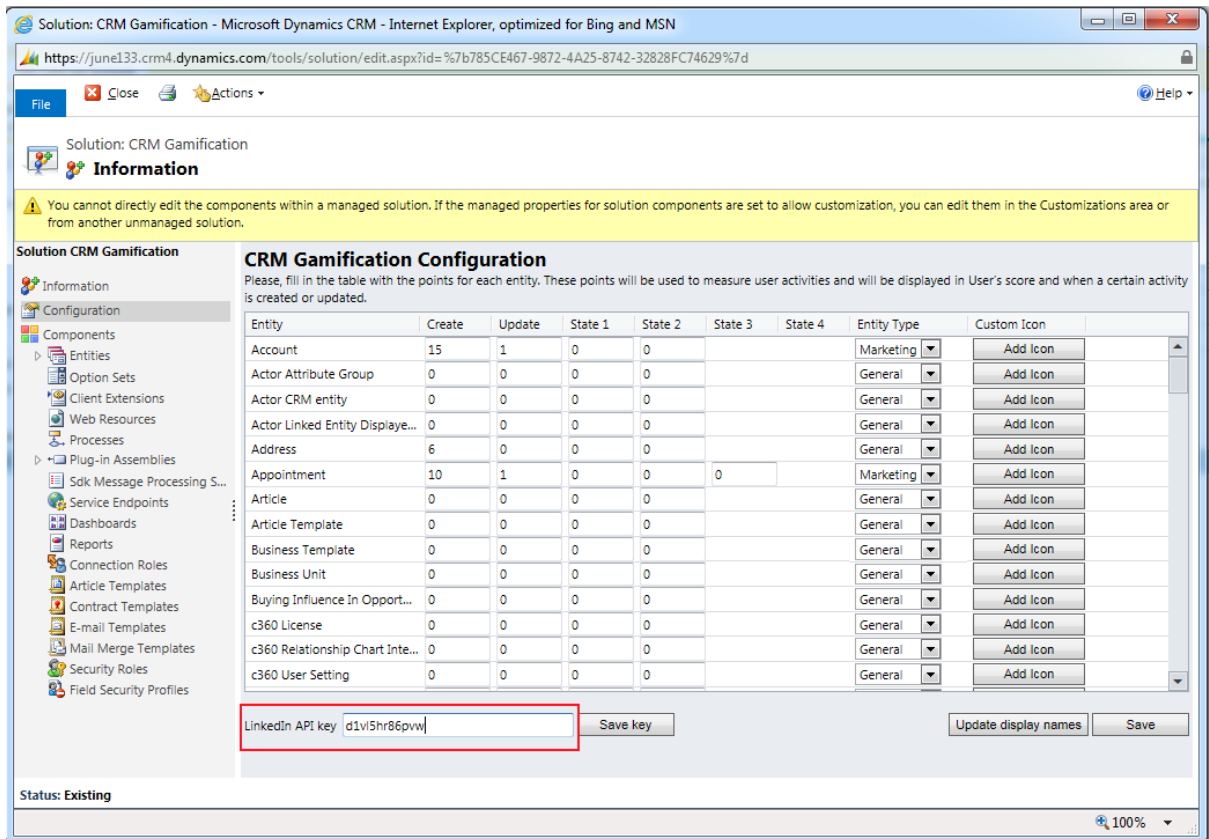
OAuth User Secret:

1e1b6d67-77d0-4c5c-a885-d32a01d76c44

**Done**

6. Then open Microsoft CRM as a user who has System Administrator role.

- Go to **Settings / Solutions** and double click on CRM Gamification Solution.  
 You will see the following form:



**Solution: CRM Gamification**

**Information**

You cannot directly edit the components within a managed solution. If the managed properties for solution components are set to allow customization, you can edit them in the Customizations area or from another unmanaged solution.

**Solution CRM Gamification**

**CRM Gamification Configuration**

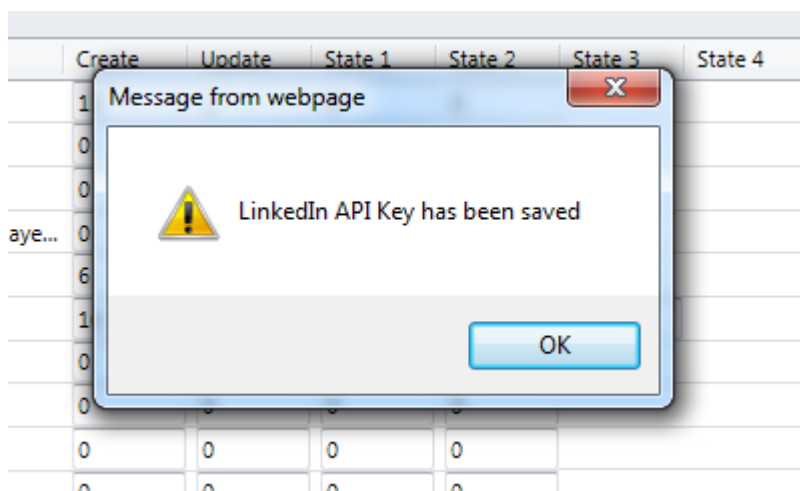
Please, fill in the table with the points for each entity. These points will be used to measure user activities and will be displayed in User's score and when a certain activity is created or updated.

Entity	Create	Update	State 1	State 2	State 3	State 4	Entity Type	Custom Icon
Account	15	1	0	0			Marketing	Add Icon
Actor Attribute Group	0	0	0	0			General	Add Icon
Actor CRM entity	0	0	0	0			General	Add Icon
Actor Linked Entity Display...	0	0	0	0			General	Add Icon
Address	6	0	0	0			General	Add Icon
Appointment	10	1	0	0	0		Marketing	Add Icon
Article	0	0	0	0			General	Add Icon
Article Template	0	0	0	0			General	Add Icon
Business Template	0	0	0	0			General	Add Icon
Business Unit	0	0	0	0			General	Add Icon
Buying Influence In Opport...	0	0	0	0			General	Add Icon
c360 License	0	0	0	0			General	Add Icon
c360 Relationship Chart Inte...	0	0	0	0			General	Add Icon
c360 User Setting	0	0	0	0			General	Add Icon

LinkedIn API key:  Save key Update display names Save

Status: Existing

Enter LinkedIn API key that you have copied and click **Save key**. After that you will see the following message.



After that your Gamification Users will be able to sign in with their LinkedIn account.  
 (See the screenshot below)

## List of Games ×


How well do you know your customer (contacts)?


How well do you know your customer (accounts)?

 Sign in with LinkedIn


Authorize | LinkedIn - Internet Explorer, optimized for Bing and MSN

[https://www.linkedin.com/uas/oauth/authorize?oauth\\_token=06cc7782-e380-479c-a13c-fd233dff2053&state=](https://www.linkedin.com/uas/oauth/authorize?oauth_token=06cc7782-e380-479c-a13c-fd233dff2053&state=)






Gamification Tool would like to access some of your LinkedIn info:



**YOUR PROFILE OVERVIEW**  
Name, photo, headline, and current positions

**Sign in to LinkedIn and allow access:**

[Join LinkedIn](#)[Forgot your password?](#)



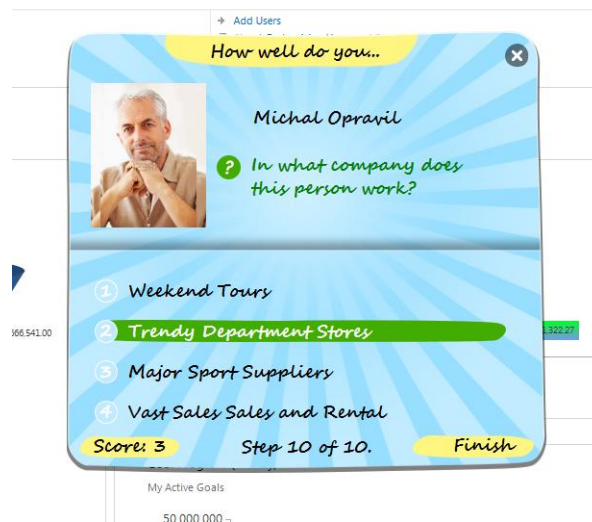
All Applications can be found in your settings  
[Terms of Service](#) | [Privacy Policy](#)

If you have filled in LinkedIn Profile field on the Contact form (**Contact Form/Details/Personal Information**)

#### Personal Information

Gender	<input type="text"/>	Birthday	<input type="text"/>
Marital Status	<input type="text"/>	Anniversary	<input type="text"/>
Spouse/Partner Name	<input type="text"/>	Picture URL	<input type="text"/>
		LinkedIn Profile	<input type="text" value="se.linkedin.com/in/michalopravil/"/>

Then you will be able to see the Contact picture from LinkedIn account while playing a game.



## How to play the Game

This Game is a part of Gamification Tool, so all users that have Gamification Tool Licenses get the opportunity to find out how well they know their customers. By default the solution is shipped with 2 games for Account and Contact entities. To learn how to create a new Game, see Game Configuration section.

To start a Game, open Leaders Billboard and click on the Game icon.

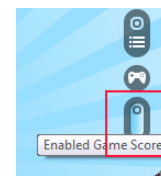




Then select the Game, you would like to play and answer the questions.



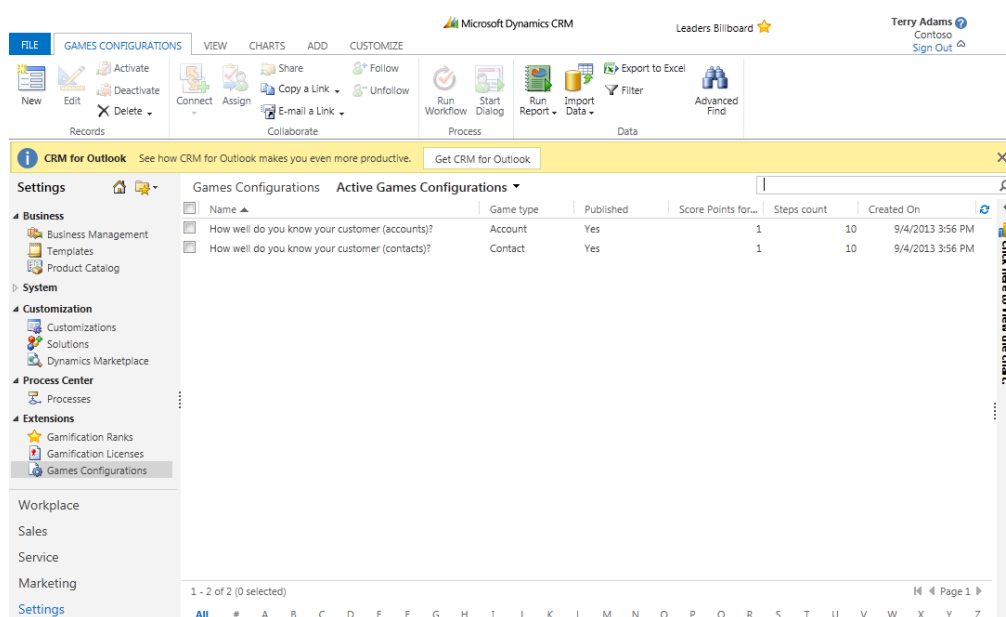
Game results will be added to the general Gamification score. If you would like to see just Game results, select Enable Game Score on the Leaders Billboard.



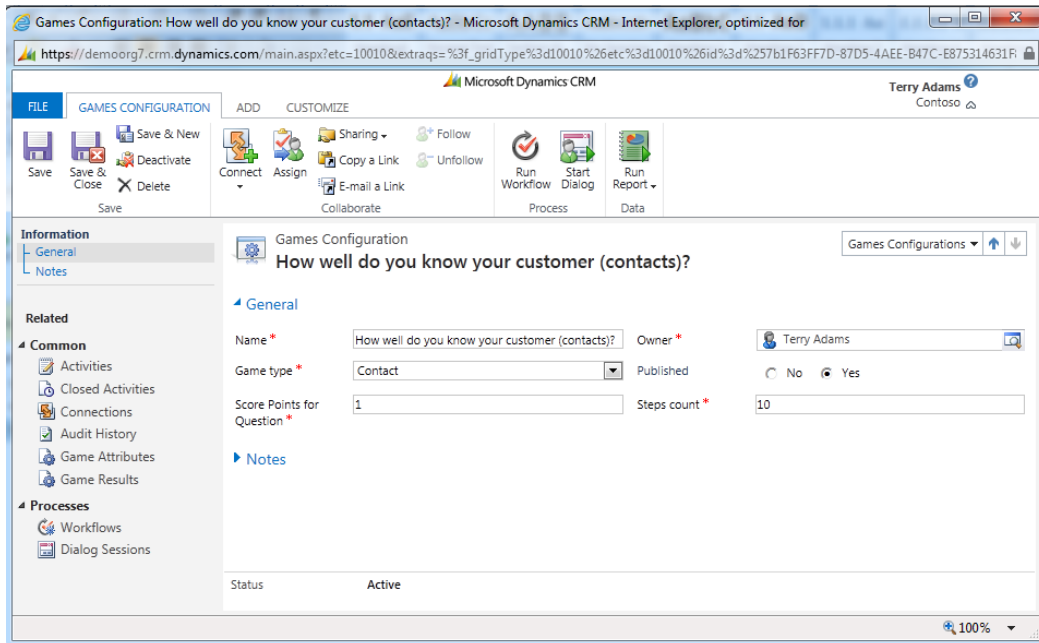
## Game Configuration

This Game is completely customizable, so System Administrator or Gamification Tool Administrator can easily add a new game with new questions or change the number of questions and points for each question.

To add a new game, go to **Settings/Extensions/Games Configuration** and click New



Enter the Name of your game, select the entity (Contact or Account) for which this game is created. Then set score points for each question and the total number of questions for this game. As soon as you select Published – YES, this game will be displayed in the list of all games.



Games Configuration: How well do you know your customer (contacts)? - Microsoft Dynamics CRM - Internet Explorer, optimized for

https://demoorg7.crm.dynamics.com/main.aspx?etc=10010&extraqs=%3f\_gridType%3d10010%26etc%3d10010%26id%3d%257b1f63ff7d-87d5-4AEE-B47C-E875314631R

Microsoft Dynamics CRM Terry Adams Contoso

FILE GAMES CONFIGURATION ADD CUSTOMIZE

Save Save & New Deactivate Save & Close Delete Connect Assign Copy a Link E-mail a Link Collaborate Run Workflow Start Dialog Run Report

Information General Notes

Related Common Activities Closed Activities Connections Audit History Game Attributes Game Results Processes Workflows Dialog Sessions

Games Configuration How well do you know your customer (contacts)? Games Configurations

General

Name \* How well do you know your customer (contacts)? Owner \* Terry Adams

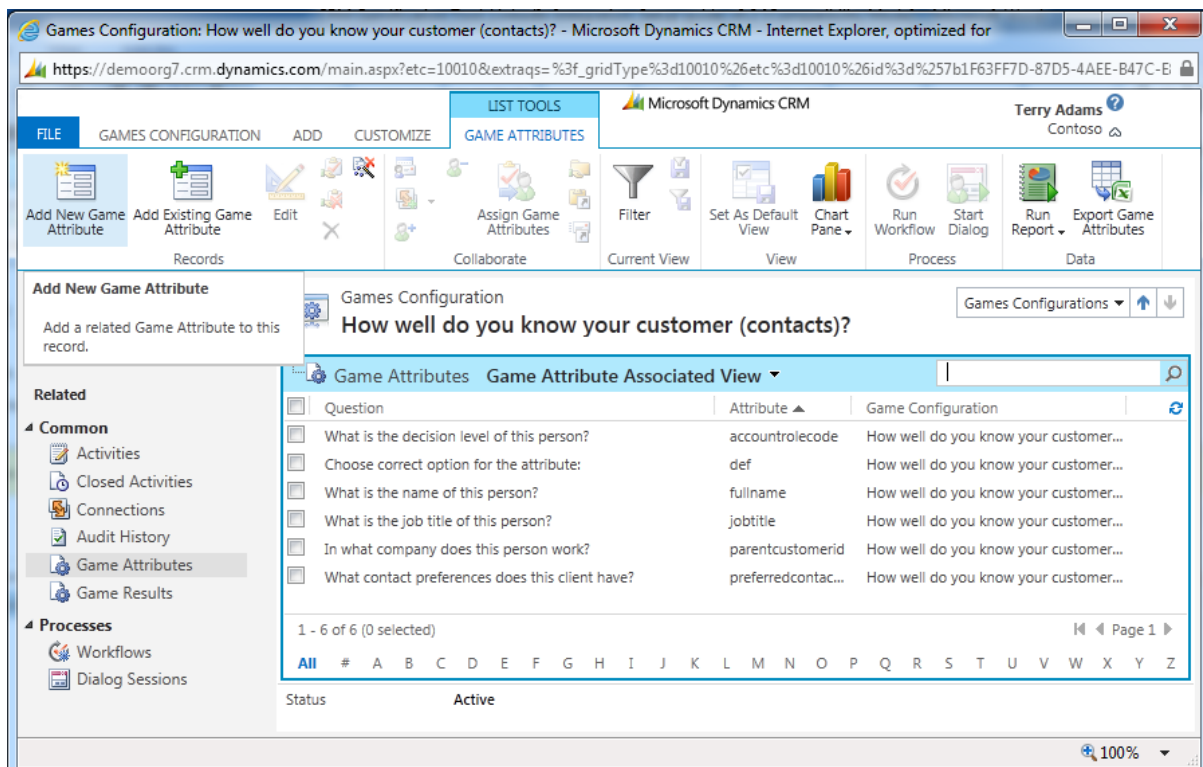
Game type \* Contact Published ☐ No ☒ Yes

Score Points for Question \* 1 Steps count \* 10

Notes

Status Active

To add questions to the Game, go to Game Attributes in the navigation pane



Games Configuration: How well do you know your customer (contacts)? - Microsoft Dynamics CRM - Internet Explorer, optimized for

https://demoorg7.crm.dynamics.com/main.aspx?etc=10010&extraqs=%3f\_gridType%3d10010%26etc%3d10010%26id%3d%257b1f63ff7d-87d5-4AEE-B47C-E875314631R

Microsoft Dynamics CRM Terry Adams Contoso

FILE GAMES CONFIGURATION ADD CUSTOMIZE LIST TOOLS GAME ATTRIBUTES

Add New Game Attribute Add Existing Game Attribute Edit Assign Game Attributes Filter Set As Default View Chart Pane Run Workflow Start Dialog Run Report Export Game Attributes

Records Collaborate Current View View Process Data

Add New Game Attribute Add a related Game Attribute to this record.

Related Common Activities Closed Activities Connections Audit History Game Attributes Game Results Processes Workflows Dialog Sessions

Games Configuration How well do you know your customer (contacts)? Games Configurations

Game Attributes Game Attribute Associated View

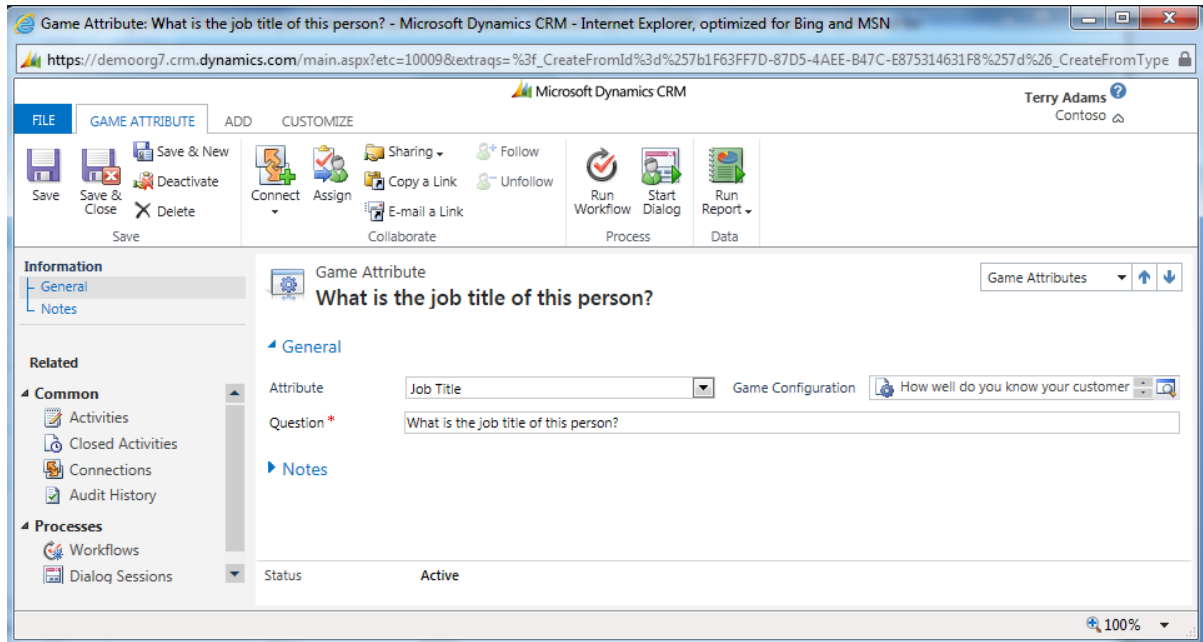
Question	Attribute	Game Configuration
What is the decision level of this person?	accountrolecode	How well do you know your customer...
Choose correct option for the attribute:	def	How well do you know your customer...
What is the name of this person?	fullname	How well do you know your customer...
What is the job title of this person?	jobtitle	How well do you know your customer...
In what company does this person work?	parentcustomerid	How well do you know your customer...
What contact preferences does this client have?	preferredcontac...	How well do you know your customer...

1 - 6 of 6 (0 selected) Page 1

All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Status Active

Click Add New Game Attribute. All questions are based on CRM attributes, so to add a new question you need to specify the attribute that is retrieved as the answer.



When finished, click **Save & Close**.