Integrating LinkedIn and WinSearch

There are several ways you will want to have LinkedIn and WinSearch working together:

- Have a WinSearch UDF for people that connects to their LinkedIn profile
- Transfer LinkedIn contacts into WinSearch.
- Getting WinSearch people into LinkedIn.

When you import your LinkedIn Contacts into WinSearch, you have these approaches:

- Import them one by one using their profile information
- Import all LinkedIn Contacts into WinSearch

User Defined Field for LinkedIn

You can have a user defined field that tracks LinkedIn profiles. SYSADM sets up the user defined field with the SETTINGS | SYSADM OPTIONS | USER DEFINED FIELD SETUP command. The dialog box to the right shows this UDF's setup entries before SAVE is selected. Once SAVE is selected, that UDF becomes available for people.

Once the UDF for LinkedIn is set up, you are ready to use it. To do so, follow these steps:

1. Find that person at the LinkedIn web site like so:
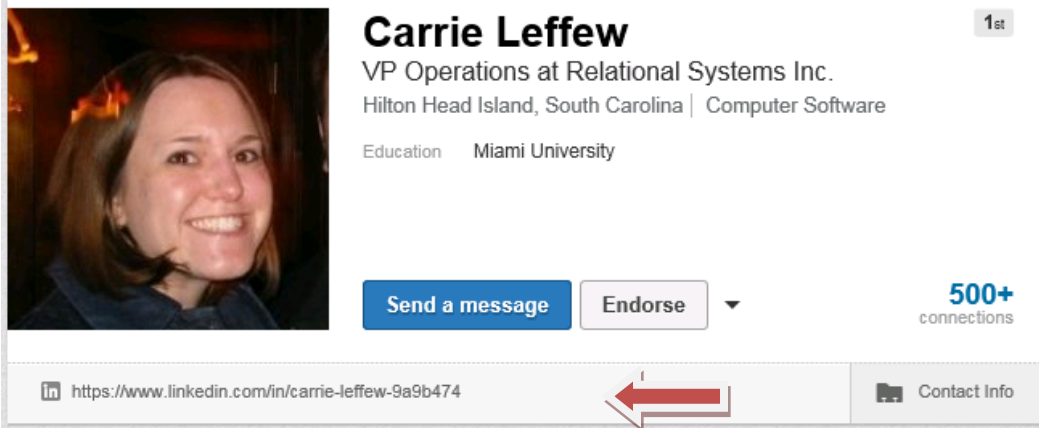
Notice the web address below the picture and next to the ![in] icon.

2. Right-click the web address next to the ![in] icon and then choose COPY SHORTCUT.

3. Go to that person's form in WinSearch.

4. Right-click the User Defined Fields box and choose ADD NEW FIELD.

5. Choose the LinkedIn UDF from the first box.

6. Paste the web site into the 2nd box and press Enter. Now your UDF looks like this:

Once the LinkedIn UDF is added for a person, when you are at a person with a LinkedIn UDF, you can go to their LinkedIn profile by right-clicking it and choosing Open Web Site.

If you have set email addresses to kick off emails when they are double-clicked in WinSearch, then double-clicking the LinkedIn UDF will also open the web site for the person. This behavior is set with the SETTINGS | USER OPTIONS | GENERAL SETTINGS command.
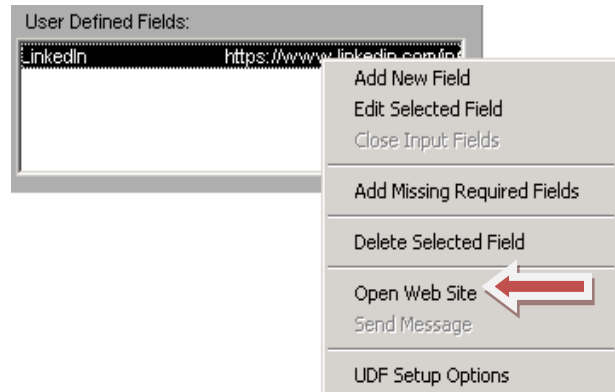
Importing a LinkedIn Contact Using their LinkedIn Profile

These steps bring in a person one at a time into WinSearch. It does it by taking their profile information that they have on their LinkedIn page and treating it as a candidate's information/resume. This method also combs their LinkedIn profile information for key words which helps identify them for positions you are trying to fill. There are three ways of doing this:

- Copy the LinkedIn info to the Clipboard then use the New Person from Clipboard toolbar button
- Paste the LinkedIn info into Word and process it as a Word document
- Open it as a PDF into Word and process it there (Office 2013 or higher)

Create Person With New Person from Clipboard toolbar button

To import a LinkedIn contact using their profile information, follow these steps:

1. Find the person's Profile page on LinkedIn.

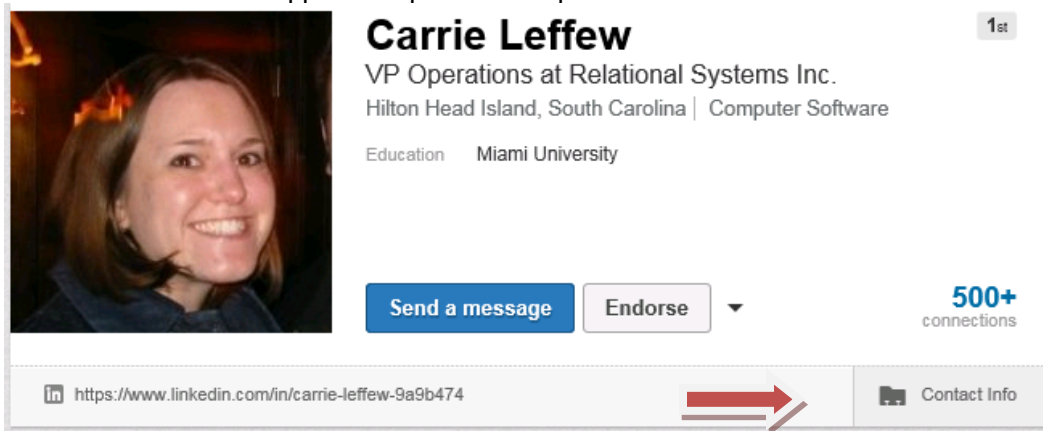2. Click Contact Info that appears as part of their profile's header.
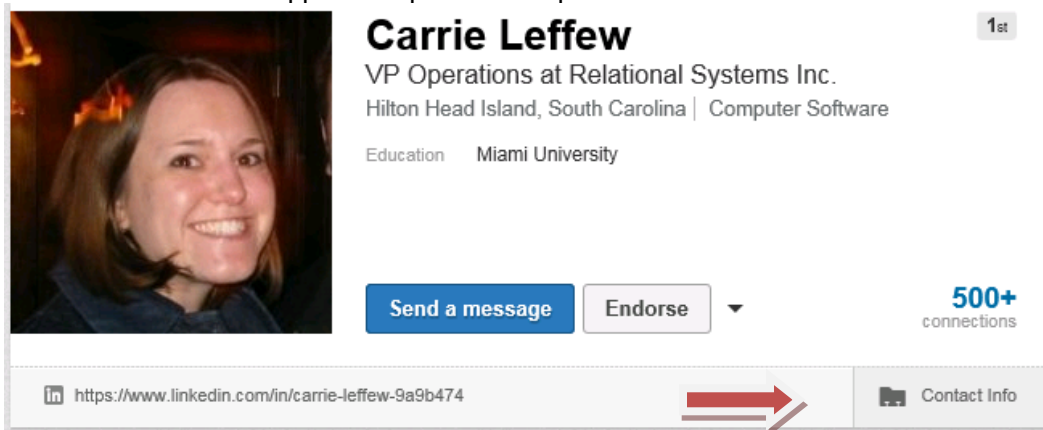
3. On the LinkedIn page, click just the left side of the first letter of their name. It will look like nothing has happened.

4. Scroll down through the page until you see the end of the text that you want to select.

5. Hold down the Shift key and then click the end of the text to highlight.

6. Right-click and choose Copy or press Ctrl +C.

7. Switch to WinSearch and click the New Person from Clipboard toolbar button ( ).

8. A Persons window opens with the name, a possible email address and/or phone number and their key words.

9. Click the Save button and now you can open WSResume to see how their resume came over. Sometimes resumes brought over this way have a poor appearance so you may then decide to paste the contents into Word and process it that way.

10. Switch back to LinkedIn and then right-click the web address next to the **in** icon and choose COPY SHORTCUT.

11. Switch back to that person's form in WinSearch.

12. Paste that LinkedIn link as an entry for UDF, Notes or email address so you can contact them later.

Create Person With LinkedIn Info Copied to Word

To import a LinkedIn contact using their profile information pasted into Word, follow these steps:

1. Find the person's Profile page on LinkedIn.

2. Click Contact Info that appears as part of their profile's header.

3. On the LinkedIn page, click just the left side of the first letter of their name. It will look like nothing has happened.

4. Scroll down through the page until you see the end of the text that you want to select.

5. Hold down the Shift key and then click the end of the text to highlight.

6. Right-click and choose Copy or press Ctrl +C.

7. Switch to Word and a new document.

8. Paste the Clipboard's contents into the new document by right-clicking and choosing Paste or by pressing Ctrl +V.

9. Choose Yes if you see the following prompt.
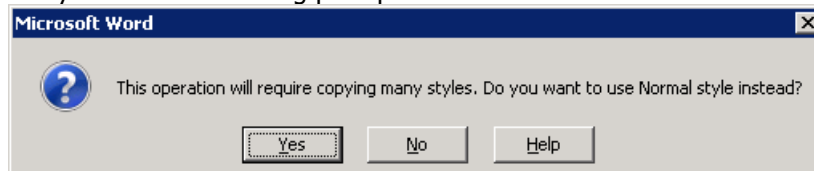
10. Click the WinSearch Process Resume toolbar button (⚡) to process the resume.

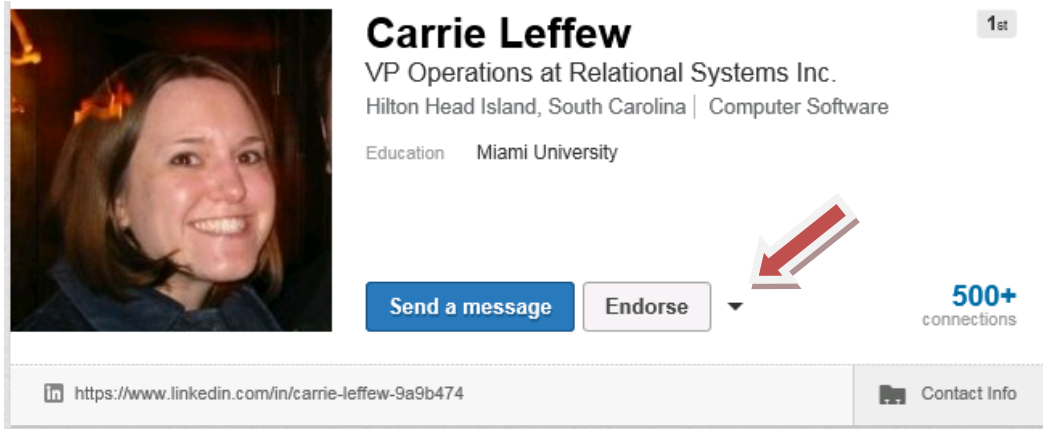11. Click Yes when prompted about saving the file.

12. Choose Yes if you see the prompt about deleting the original document (this is just the working copy so retaining it is not that useful).

13. Switch back to LinkedIn and then right-click the web address next to the in icon and choose COPY SHORTCUT.

14. Switch back to that person's form in WinSearch.

15. Paste that LinkedIn link as an entry for UDF, Notes or email address so you can contact them later.

Create Person using a PDF Opened in Word

Here is an alternative set of steps except, they only work if you use Microsoft Office 2013 or above AND you have set PDF files to open automatically using Microsoft Word as your PDF viewer application.
To import a LinkedIn contact using their profile information, follow these steps:

1. Find the person's Profile page on LinkedIn.

2. Point to the ▼ that is after Endorse then choose Save to PDF.

3. Choose OPEN when prompted about opening or saving the PDF file and open the document in Word.

4. If the document is shown as Protected, click the ENABLE EDITING button.

5. Click the WinSearch Process Resume toolbar button (⚡) to process the resume.

6. Click Yes when prompted about saving the file.

7. Choose Yes if you see the prompt about deleting the original document (this is just the working copy so retaining it is not that useful).

8. Switch back to LinkedIn and then right-click the web address next to the in icon and choose COPY SHORTCUT.

9. Switch back to that person's form in WinSearch.

10. Paste that LinkedIn link as an entry for UDF, Notes or email address so you can contact them later.

Importing All LinkedIn Contacts into WinSearch
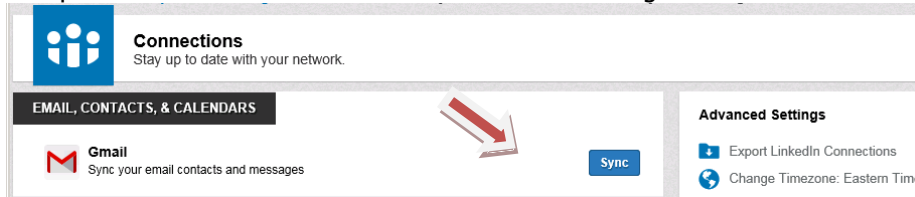
To import all of your LinkedIn contacts into WinSearch, follow these steps:

1. In LinkedIn, click on My Network at the top then choose Connections.

2. Click the Settings button at the end of the Connections bar.
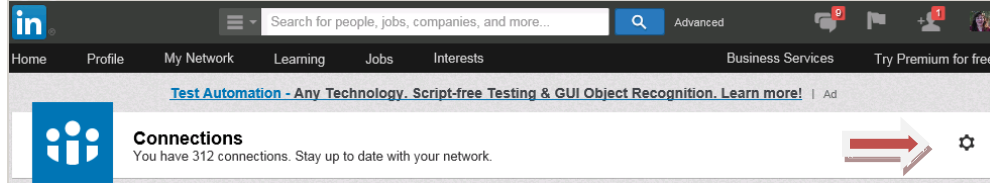
3. Choose Export LinkedIn Connections under Advanced Settings.

4. Choose EXPORT with the drop-down containing Microsoft Outlook (*.CSV file).

5. Respond to any confirmation prompts.

6. Click Save and note the name and location where the file is saved. You can also click the ▼ at the end of Save to choose Save As to explicitly set the name and location for the saved file.

7. Open My Computer and go to the location where you saved the CSV file.

8. Right-click the file and choose Open With and Notepad. At this point, you do not want to open the file in Excel.

9. Paste the following text at the beginning of the file. It is all one line.
   Honorific,Firstname,Middle,Lastname,Notes Suffix,Email,Email Secondary,Email 3rd,Comaddress_1,Comaddress_2,Notes Work Address 3,ComCity,Comstate,ComZIP,ComCountry,Address_1,Address_2,Notes Address 3,City,State,ZIP,Country,Notes Other Street,Notes Other Street 2,Notes Other Street 3,Notes Other City,Notes Other State,Notes Other Postal Code,Notes Other Country,Comname,Notes Department,Title,Phone Assistant,Phone Business Fax,Phone Business,Phone Business 2,Phone Callback,Phone Car,ComPhone Main,Phone Home Fax,Phone Home,Phone Home 2,Phone ISDN,Phone Mobile Phone,Phone Other Fax,Phone Other,Phone Pager,Phone Primary,Phone Radio,Phone TTY/TDD,Phone Telex,AssistName,DateOfBirth,Notes Manager Name,Notes Notes,Notes Business Address PO Box,Spouse,Notes Web Page,Notes Personal Web Page

10. Remove the line containing "Title" through "Personal Web Page"

11. Close the file in Notepad and save your changes.

12. Open in Excel by double-clicking the file.

13. Move to the last column (column BG) and then move one column to the right.

14. Enter **Status** in BH1

15. Put Active or whatever you want the status to be for these people in BH2.

16. Copy BH2 through the remaining rows. You can do this by pressing Ctrl+C for copying BH2 then pressing the down arrow to move to BH3 then hold down Shift while you press the End key then the Home key then press Enter to paste the values.

17. Save the file, keeping the CSV format.

18. Open WSImport. If you do not have this available, contact Relational Systems technical support for directions and files.

19. Select BROWSE and choose the file that has your LinkedIn contact information. Once the file is chosen, WinSearch Import shows how the data will be imported.
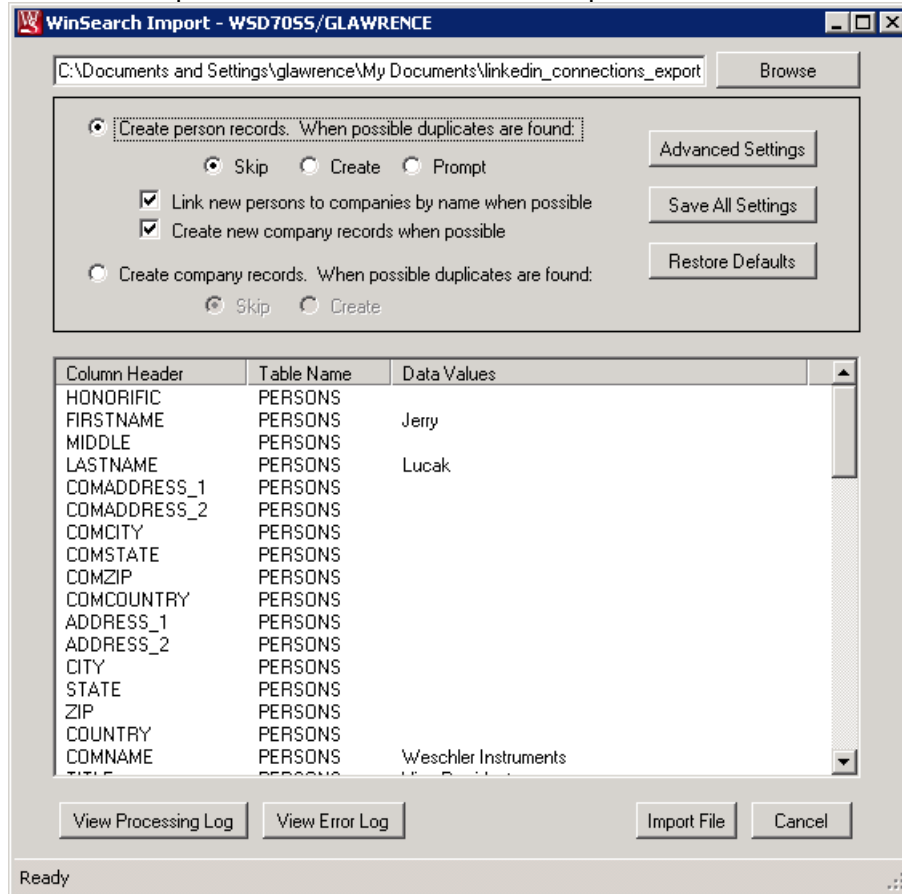
20. Make any changes to the WinSearch Import settings. These settings are further described in the separate WinSearch Import Utility documentation.

21. Click the IMPORT FILE button

22. Choose OK to verify and confirm the database and user name to use for importing the people. Once imported, the center box changes to show the results like these:
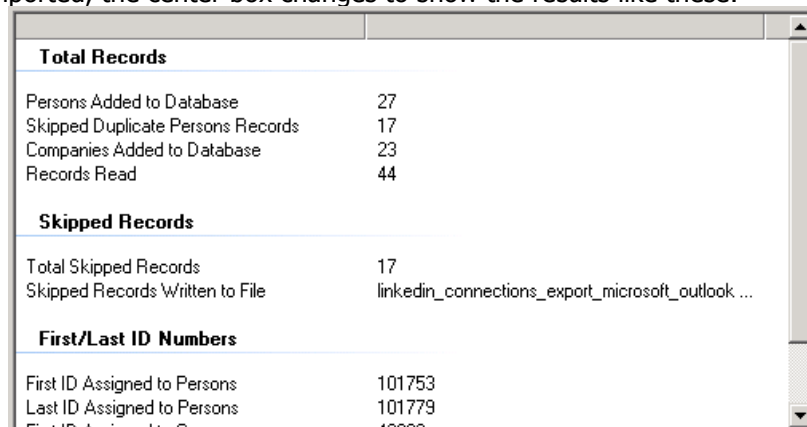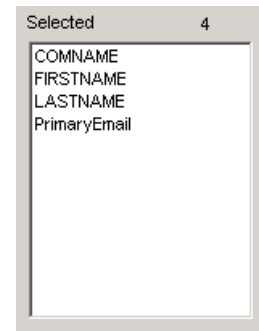
In this example, 27 people were added and 23 companies were added. 17 were skipped. By using the View Processing Log button, it was determined that the 17 were all duplicates. If you decide that you do not want these people added after all, choose the Delete Results button. This button is only available after importing the data as long as you do not close the WinSearch Import dialog box.

At this point, your LinkedIn Contacts are added to your WinSearch database. Look at them in WinSearch to verify that you are seeing what you expect. Do not close the WinSearch Import utility until after you have verified the data in WinSearch.

Getting WinSearch People to LinkedIn

These steps guide you through taking people in WinSearch and bringing them into LinkedIn. Use these steps when you have a list of candidates or contacts in your WinSearch database that you want to add to your LinkedIn network.

1. Get to a list of WinSearch people that you want brought into LinkedIn. This can be by looking people up, a query, a search or a saved list.

2. Select the REPORTS | STANDARD REPORTS command then click the MERGE FILE button.

3. With the Create Quick Mail Merge button selected, choose SPECIFY COLUMNS.

4. Click the CLEAR button to remove the entries in the right hand list.

5. Find these entries and double-click them so the right-hand list of Selected items looks like the one on the right.

6. Choose ACCEPT.

7. Choose Entire Results Set and Go.

8. Change the Saved In entry in the dialog box to where you want the data file placed. It must be a location that you can find later.

9. Type **LinkedIn.csv** for the File Name and click SAVE.

10. Find the LinkedIn.CSV file and double-click it to open it in Excel. You will see the company names, names and email addresses.

11. Select the Insert | Columns command to add a new column at the beginning.

12. Type **Name** in A1

13. In A2, type **=C2&" "&D2** and press Enter.

14. Copy A2's formula for all the people listed.

15. Close the worksheet and choose Yes to both of the prompts.

16. Go to the LinkedIn web site and choose My Network then choose Add Contacts.

17. Click IMPORT FILE button which appears along the left side.

18. Find and double-click the file that you have created. You may need to change the File Type drop-down to All Files (*.*) to see the CSV files.

19. Click the UPLOAD FILE button.

20. Respond to any remaining LinkedIn prompts.

21. Now the web site displays a list showing which of those contacts are not already in your LinkedIn profile. You can remove any if you want.

22. Choose Send Invitations and LinkedIn will continue the process of getting them you're your network.

Setting Which Emails You Receive from LinkedIn

LinkedIn has several settings that set when you receive emails. This isn't a feature that connects WinSearch and LinkedIn but rather a feature that recruiters tend to have strong emotions over which is why it is covered here.

To make adjustments for which emails you receive:

1. In LinkedIn, click your picture in the upper right corner then choose Manage after Privacy & Settings.

2. Choose Communications

3. Choose Change for Email Frequency.

4. Click on Details on the different types of messages that LinkedIn will send.