

Contents

Why Use the TriSys Browser Extension	2
Install the Extension.....	2
Visual Functionality Overview.....	4
Add new contact from LinkedIn.....	7
Associate existing TriSys database record with LinkedIn profile	9
Selective Field Update.....	14
TriSys Apex Automatic Browser Tab Focus	15
Add new contact from GMail message	15

Why Use the TriSys Browser Extension

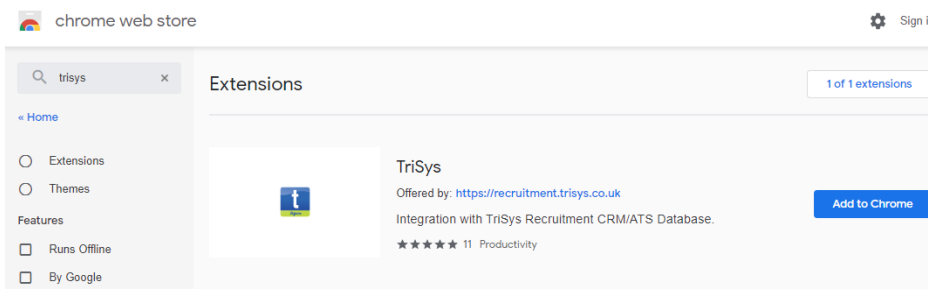
- Compatible with LinkedIn Free and LinkedIn Recruiter
- Streamlined business development and contact management
- Streamlined client and candidate database management
- Enrich your TriSys contact database with LinkedIn contact information
- Overlay of key CRM/ATS contact details directly within LinkedIn profile pages
- Faster and more informed decision-making, less mistakes and greater accuracy
- Running action workflows directly from within LinkedIn profile pages
- Saving time and money on a daily basis, increasing your operational returns

The TriSys browser extension works with the latest version of Google Chrome and has also been successfully tested on Microsoft's latest Edge web browser which runs on the Google Chromium open source web browser engine.

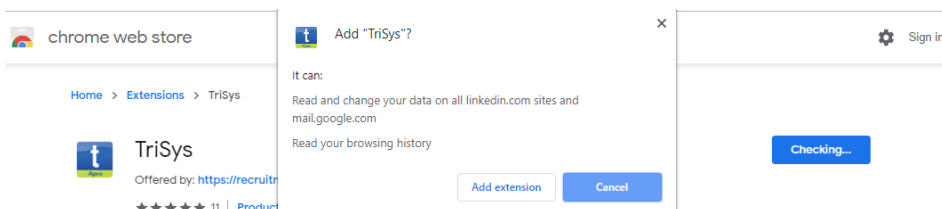
Install the Extension

Click here: <https://chrome.google.com/webstore/search/trisys>

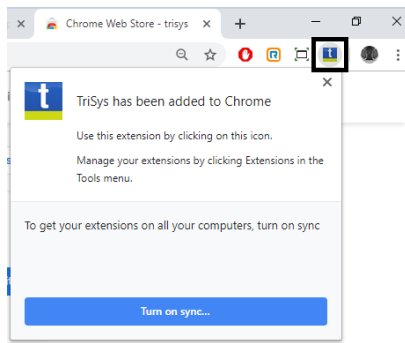
Next, click the blue button "Add to Chrome"



Click "Add Extension"

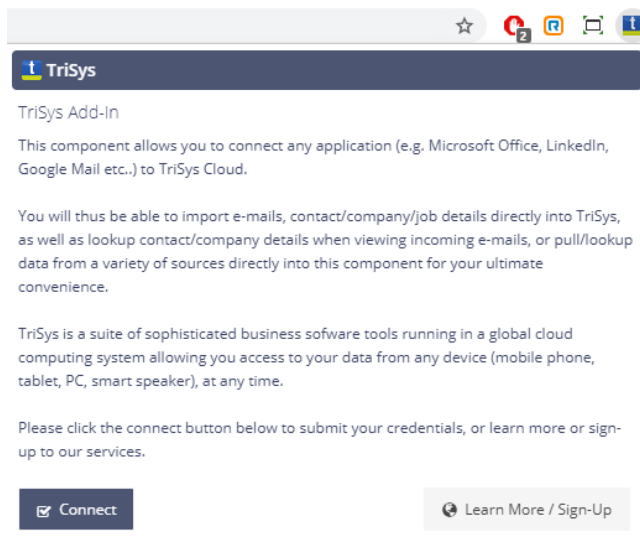



The extension will now be installed, this is clear by the presence of the TriSys icon at the top right:



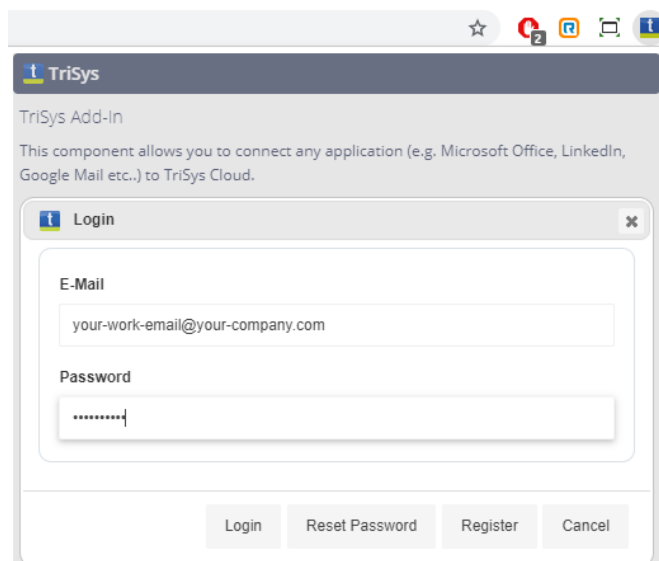
Once the Extension is visible, you will need to open any LinkedIn profile page (for example your own LinkedIn profile page).

Next, click the TriSys icon. You will see the following pop-up window, where you will click "Connect"

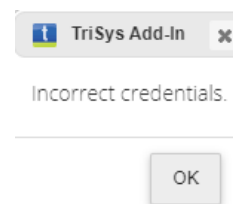


Once you click  you will need to authenticate using your existing TriSys username and password.

- For cloud hosted TriSys Customers, this will be your existing TriSys username and password
- For TriSys Customers with an onsite database server deployment, please contact your local TriSys database administrator, who will then contact support@trisys.co.uk requesting that you are authorized to login and use the TriSys Browser Extension (when this happens you will be provided with a link to set a password, which you then use in combination with your work e-mail address)




Should you see the message below, your username/password either does not match our records (you can at this point retry or click "Reset Password" or your user account has not yet been granted permission to use the TriSys Browser Extension.

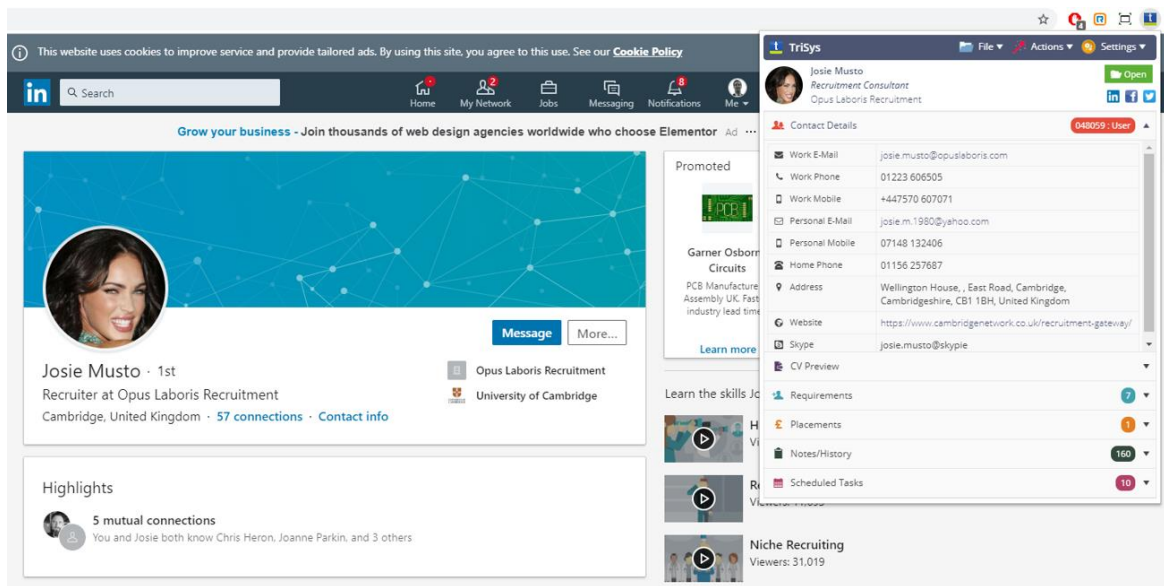


Visual Functionality Overview

The TriSys browser extension allows you to visit LinkedIn profiles and import contacts into your TriSys CRM/ATS database.

The extension also allows linking existing TriSys database contacts to their corresponding LinkedIn profile pages, resulting in a fast, informative and very convenient information-rich overlay when visiting LinkedIn profile pages, as shown in the example below (the extension is activated by clicking the  icon on your web browser toolbar.

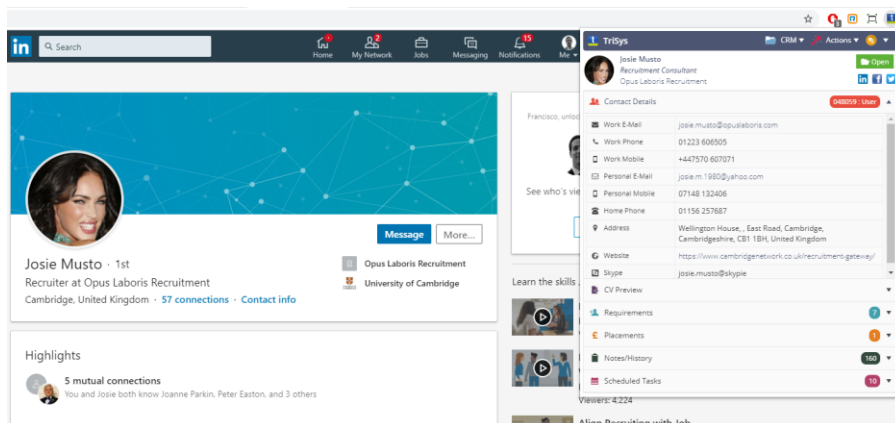
If the LinkedIn profile contact is already in your database, the following is the look and feel of the extension overlay window, next to a LinkedIn contact profile:



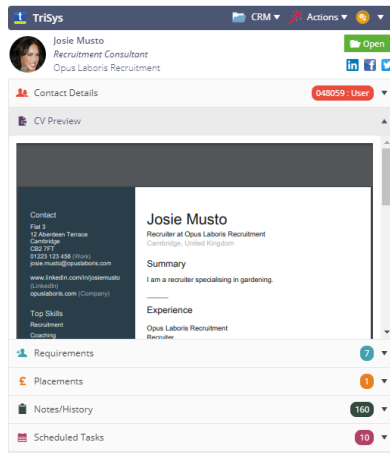
The top section of the browser extension allows you to perform the following operations, provided that you are running TriSys:

- Open the contact (click the name or use the CRM menu)
- Open the company (if applicable) by clicking the name or use the CRM menu
- Open social network pages (social network icons)
- Run Actions (Call, Note, Add to Shortlist, ToDo and more)
- You can also selectively update the contact with the most recent LinkedIn data (CRM Menu)

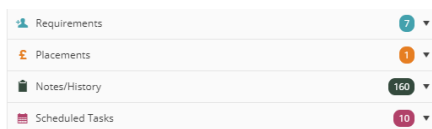
Note: the range of displayed contact details displayed will vary depending on the corresponding TriSys database fields having value or no value, hence you may see more or less contact details.



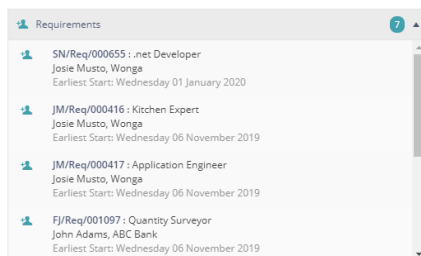
The original CV file can also be seen, using the “CV Preview” tab:



You can also view Requirements, Placements, Notes/History and Scheduled Tasks, together with total entries for each of these.



Click any of the tabs to expand the contents (for example “Requirements”). You can click the requirement reference/job title and this will open the corresponding requirement in your TriSys database (you must have TriSys running).



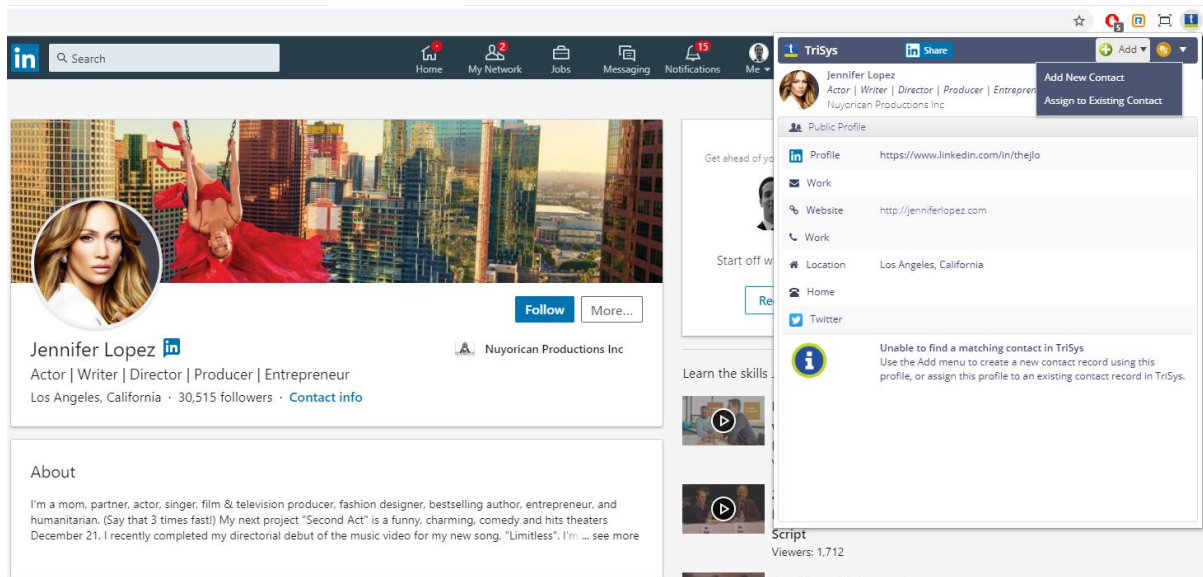
Add new contact from LinkedIn

It is possible to add brand new contacts to your TriSys database, simply by visiting a LinkedIn profile and adding the contact, a single click operation which saves you time and money, increases the quality of your TriSys contact database and helps you generate additional revenue.

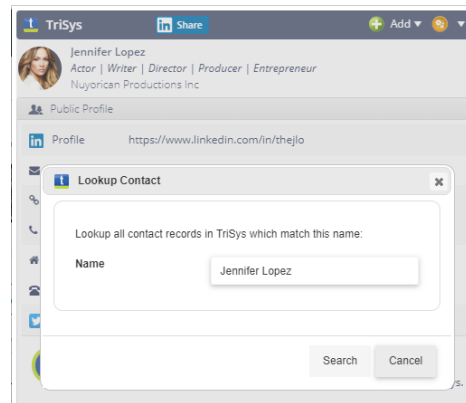
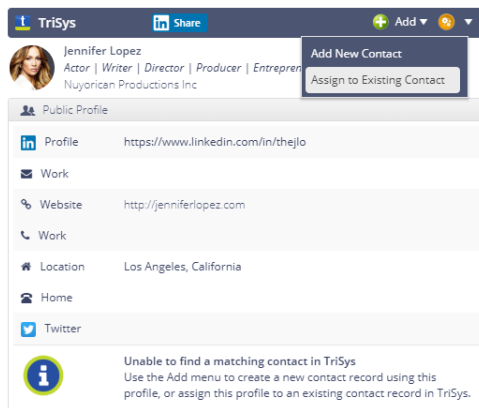
When you visit a LinkedIn profile, an automatic check takes place to confirm whether the LinkedIn profile page is already linked to an existing record on your TriSys database.

If no link is found to exist, two options are presented:

- Add new Contact
- Assign to Existing Contact



Normally at this point, it is best practice to click "Assign to Existing Contact" and then specify a contact name. This will enable you to search your TriSys database and link an existing contact in your database to the LinkedIn profile you are currently viewing:






If no contact exists in your TriSys database which matches this LinkedIn profile, you may proceed to clicking “Add New Contact”

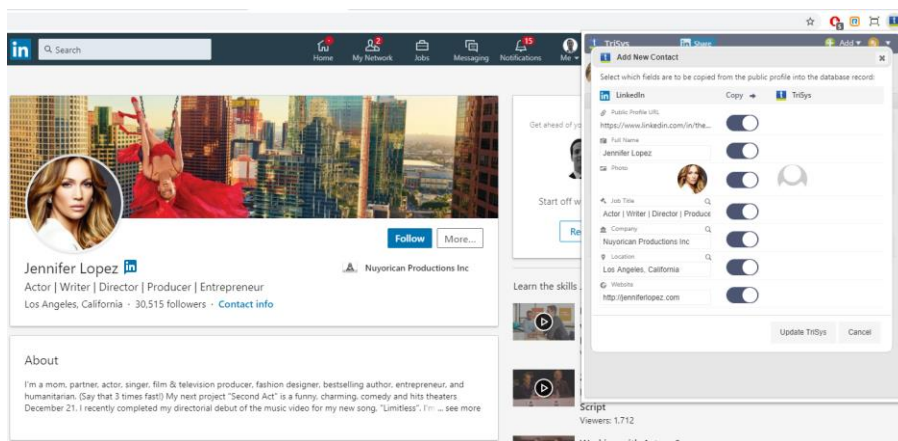


This will then allow you to selectively edit the LinkedIn field simply by clicking the text on the left hand side of the extension, for example under “Job Title”

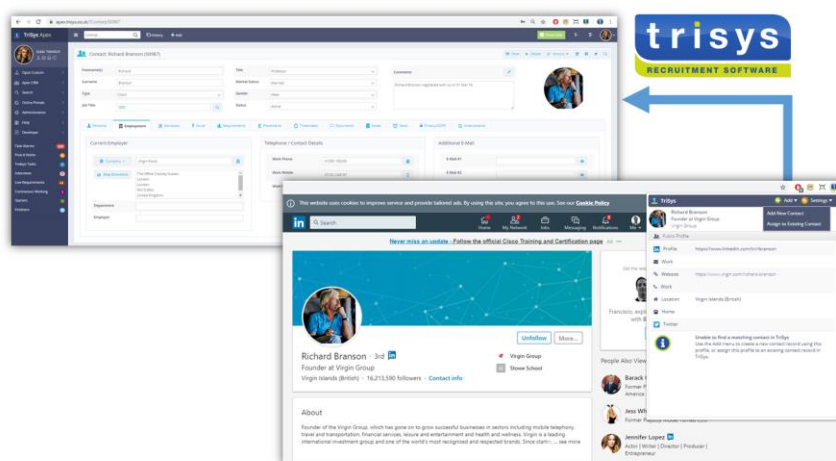
You can click this text to edit the job title before adding the contact.

Note the presence of the  icons on the left hand side of the extension, which allow you to lookup job titles, company names and company addresses which the imported contact should be linked to.

The chosen  fields will be imported into the TriSys contact record when you click the  button.



Once you have added a new record or updated an existing record, your TriSys database will be automatically updated in real time. This works whether you are using the TriSys Apex browser CRM system or the TriSys CRM Windows Desktop application edition

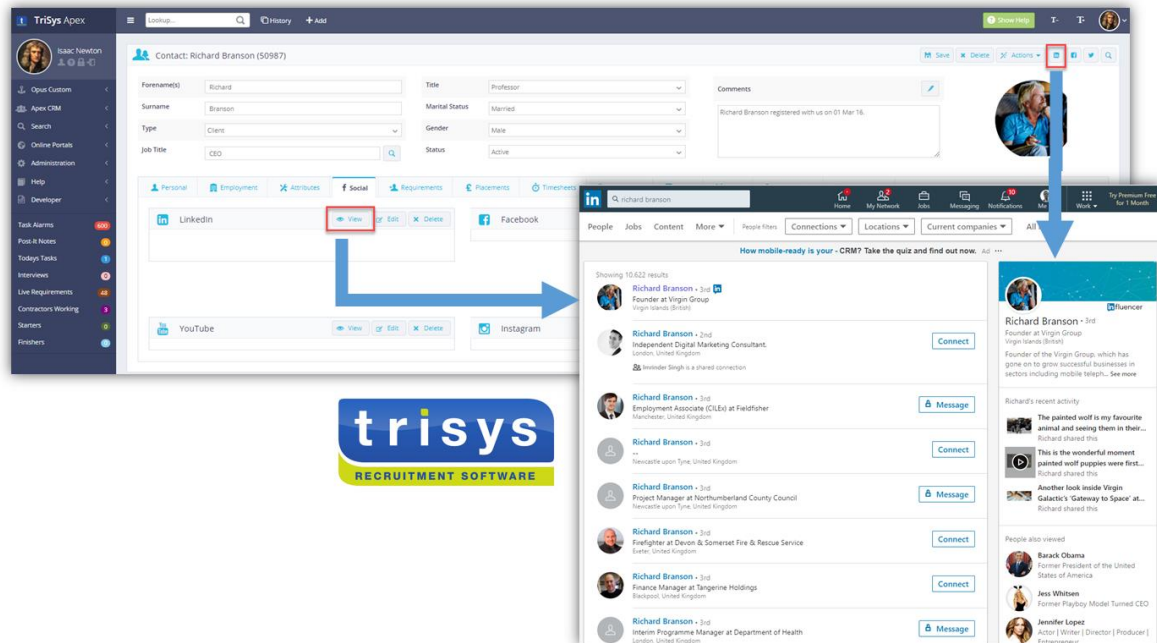


Associate existing TriSys database record with LinkedIn profile

It is likely that your TriSys database already has various contacts and that some of these do not yet have a link to their corresponding LinkedIn profile page. In such cases you would not want to create a new contact, rather link the existing contact to a LinkedIn profile.

If you are using TriSys Apex, you can automatically launch a LinkedIn search which aims to find the corresponding contact. This is done using the “View” button

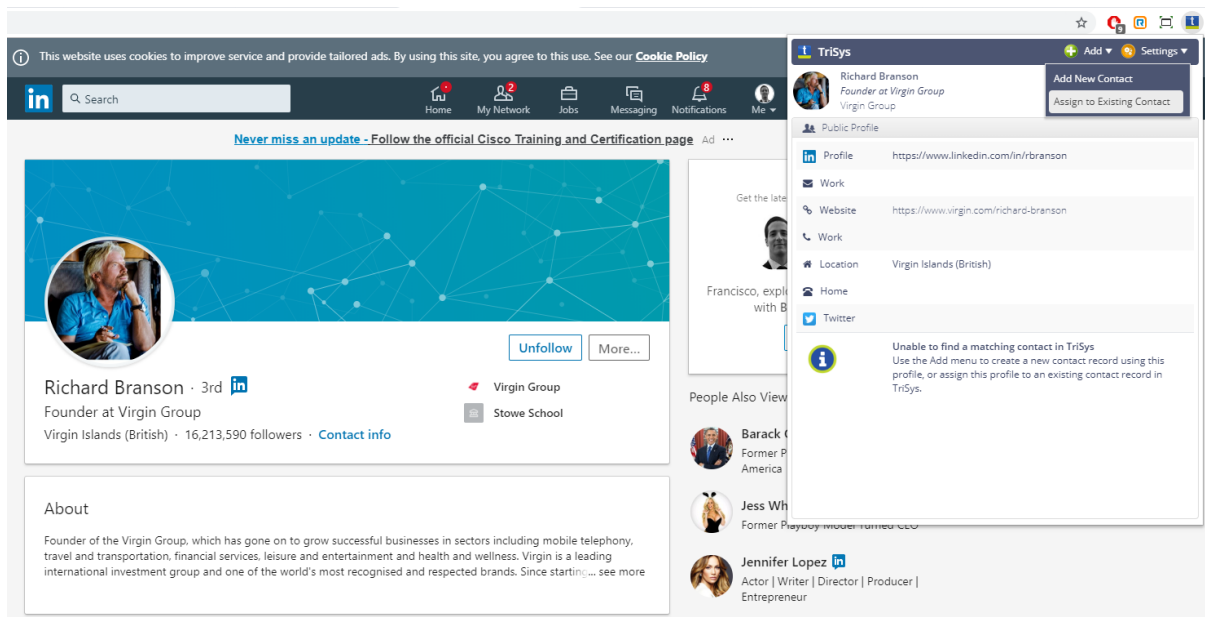
in the “Social Networks” tab of a contact record.



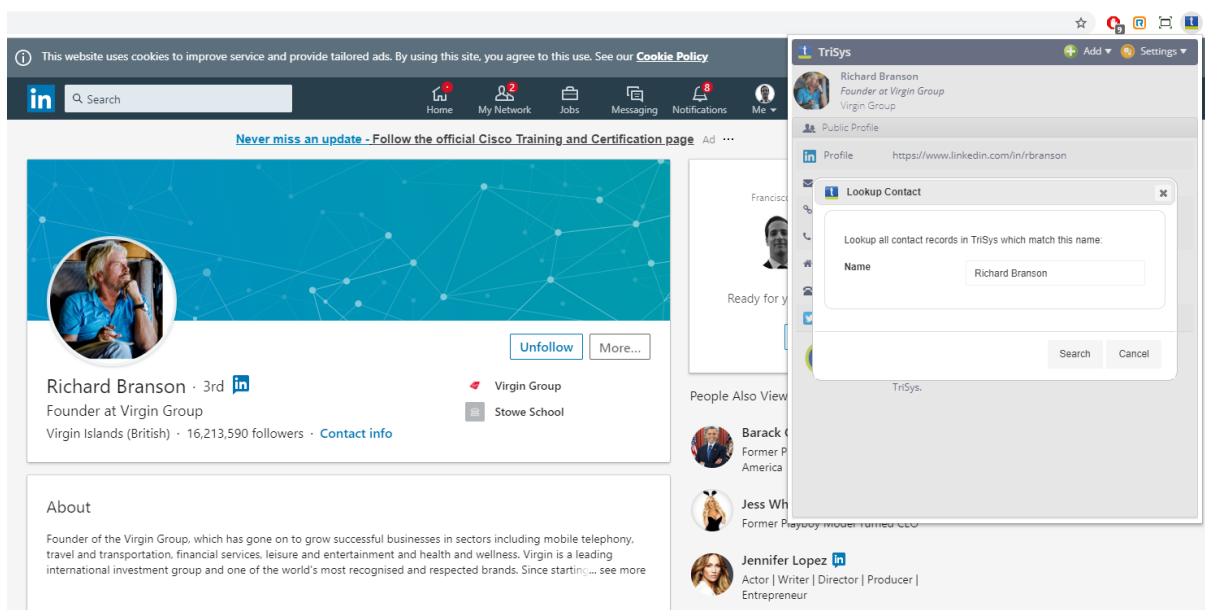
Choose the relevant contact and load their LinkedIn profile page. The browser extension is designed to work within LinkedIn profile pages, which contain the relevant contact data.

Note: if you are using the TriSys Windows Desktop Application, you will not have a “View” button as per above image. In this case, simply type the contact name/surname in the actual LinkedIn.com search box and then open the LinkedIn profile you wish to display.

Now that you have a LinkedIn profile displayed, you can link/associate the LinkedIn profile page to the existing contact in your TriSys database, by clicking “Assign to Existing Contact”



Next, type the forename and/or surname and Search. You can use either the forename and/or surname:

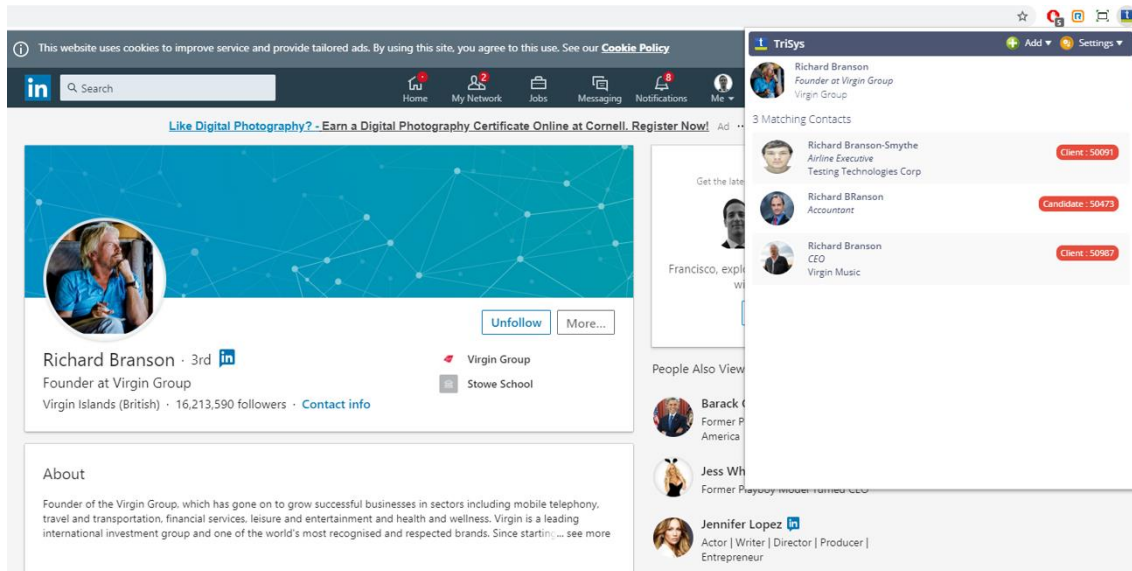


A list of potential matches found in your Trisys database is shown, allowing you to choose which existing contact record should be linked to the LinkedIn profile page. When a contact is selected (click the contact name) the link is established between the LinkedIn profile and the Trisys database contact.

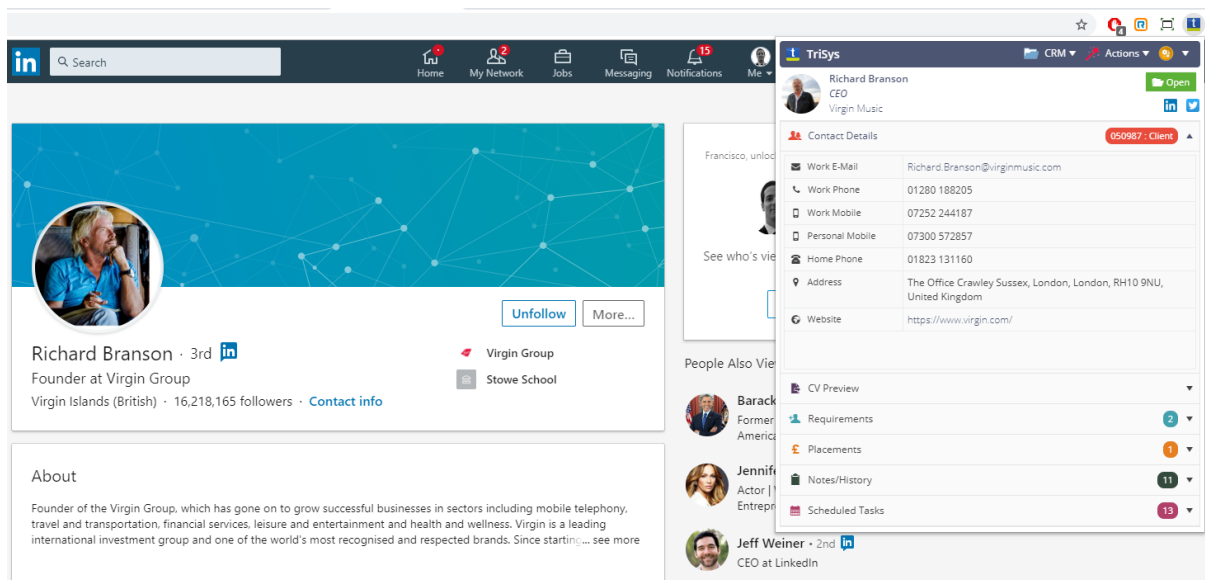
Note how, next to each contact found to match the name/surname combination, you can see:

- The contact type

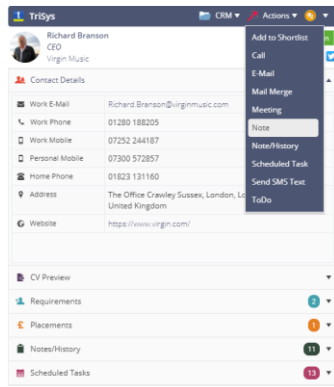
- The contact ID (which can be used to easily pinpoint, using your TriSys database and looking up this ID, whether the contact is the one you wish to assign the LinkedIn profile to, thus eliminating any ambiguity in the process of assigning a LinkedIn profile page to a TriSys database record)



The browser extension will now display/overlay all the relevant information about the contact on your TriSys database, directly inside the LinkedIn profile:

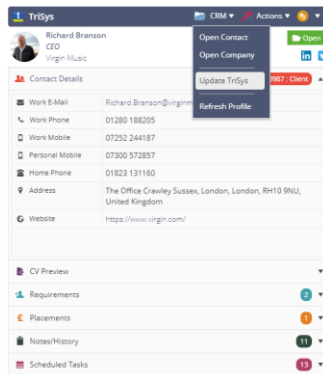


You can also run Actions directly from within the extension pop-up:

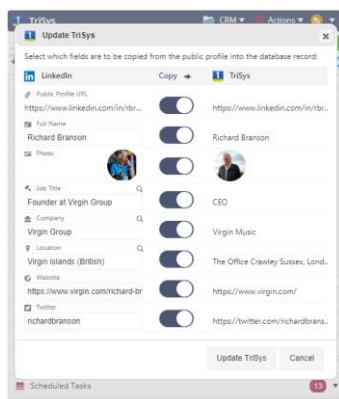


Selective Field Update



You may also selectively update the existing TriSys contact details with those found on LinkedIn:



This will reveal a window allowing you to update your TriSys database with information found on the LinkedIn profile page:



Note the following key functionalities when updating an existing contact:

- You can edit the values shown on the left (those found on the LinkedIn profile) by clicking the editable text fields on the left
- You can click the "Search" spyglass icon  where this icon is available, allowing you to link the contact to an existing company within your TriSys database
- You can selectively enable or disable the copy/update of a specific field by using the switch button  which is ON by default for all fields, allowing you to turn off specific field updates where an update is not required
- The "Update TriSys" will update the database record with the specific information you have provided as shown on the left
- Where additional fields exist, a vertical scrollbar will be displayed allowing you to also selectively edit/update those fields

TriSys Apex Automatic Browser Tab Focus

When using TriSys Apex, you can automatically display database records when interacting with a LinkedIn profile.

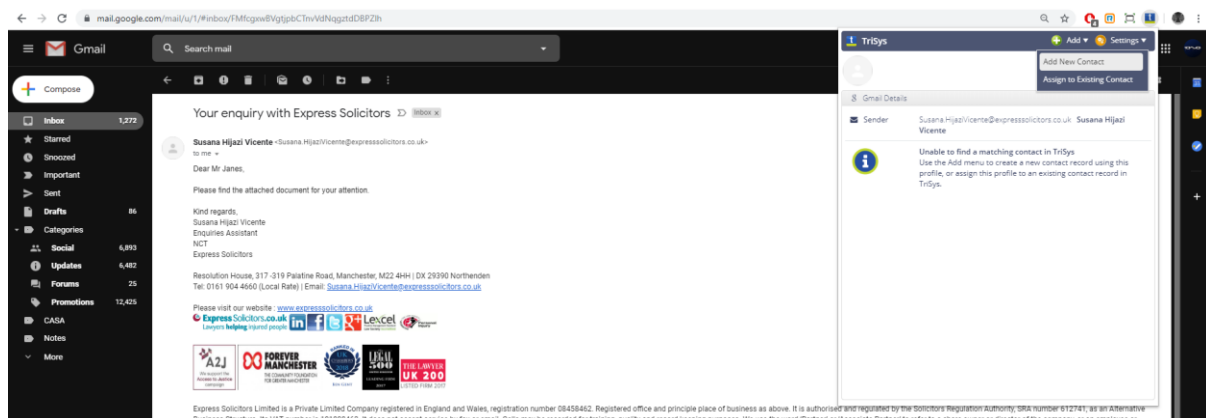
In order for this display of database records to happen automatically, instead of logging into TriSys Apex using <https://apex.trisys.co.uk> please login using <https://your-company-name.trisys.co.uk> (where “your-company-name” is the hyphenated name of your company, which can be found by logging into <https://support.trisys.co.uk> with your TriSys credentials).

Add new contact from GMail message

The TriSys browser extension also allows you to import contacts from GMail and display contact information when you are reading a GMail message and the sender of the message exists within your TriSys database (this works based on the senders’ email address, which can match either the personal and/or work email address of the contact in TriSys).

When reading a message in Gmail, click the TriSys browser extension icon once.

If the sender contact does not exist in TriSys, you can add the contact using “Add New Contact”, alternatively you can use “Assign to Existing Contact” should you wish to assign an e-mail address to a contact already on your database, as well as other contact details automatically extracted from the e-mail message.



The functionality available with the TriSys browser extension for Gmail is identical to that which is available for LinkedIn.