



SCIM Setup & Provisioning in Okta

Contents:

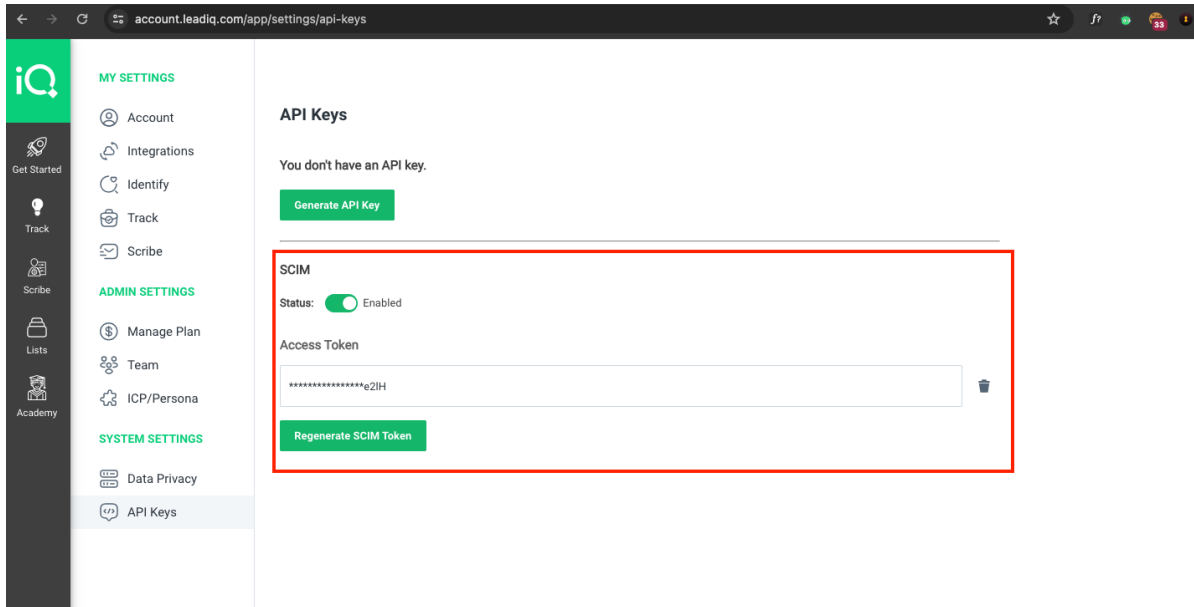
1. Setup
2. Provisioning users into the team
3. Unassigning a user from a team
4. Updating a user's first and last names
5. SCIM Groups

Setup:

1. Generate the SCIM API key for your team (section can be found in your LeadIQ Settings → API Keys).
 - a. Copy the API key
 - i. ⚠ Note: Please ensure to copy the API key as we only display it once. Once you navigate away from the page, the API key will become

obscured as shown on the screenshot below.

b. Screenshot:



2. Navigate to the Okta Application

3. Copy and paste the generated SCIM API key into the Okta app

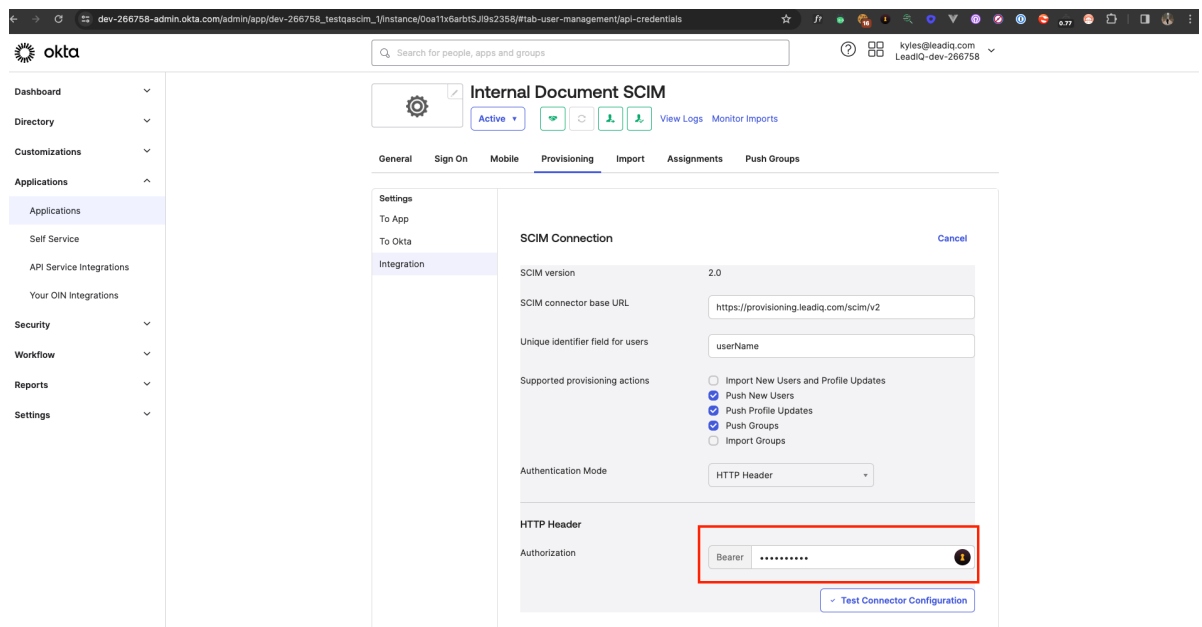
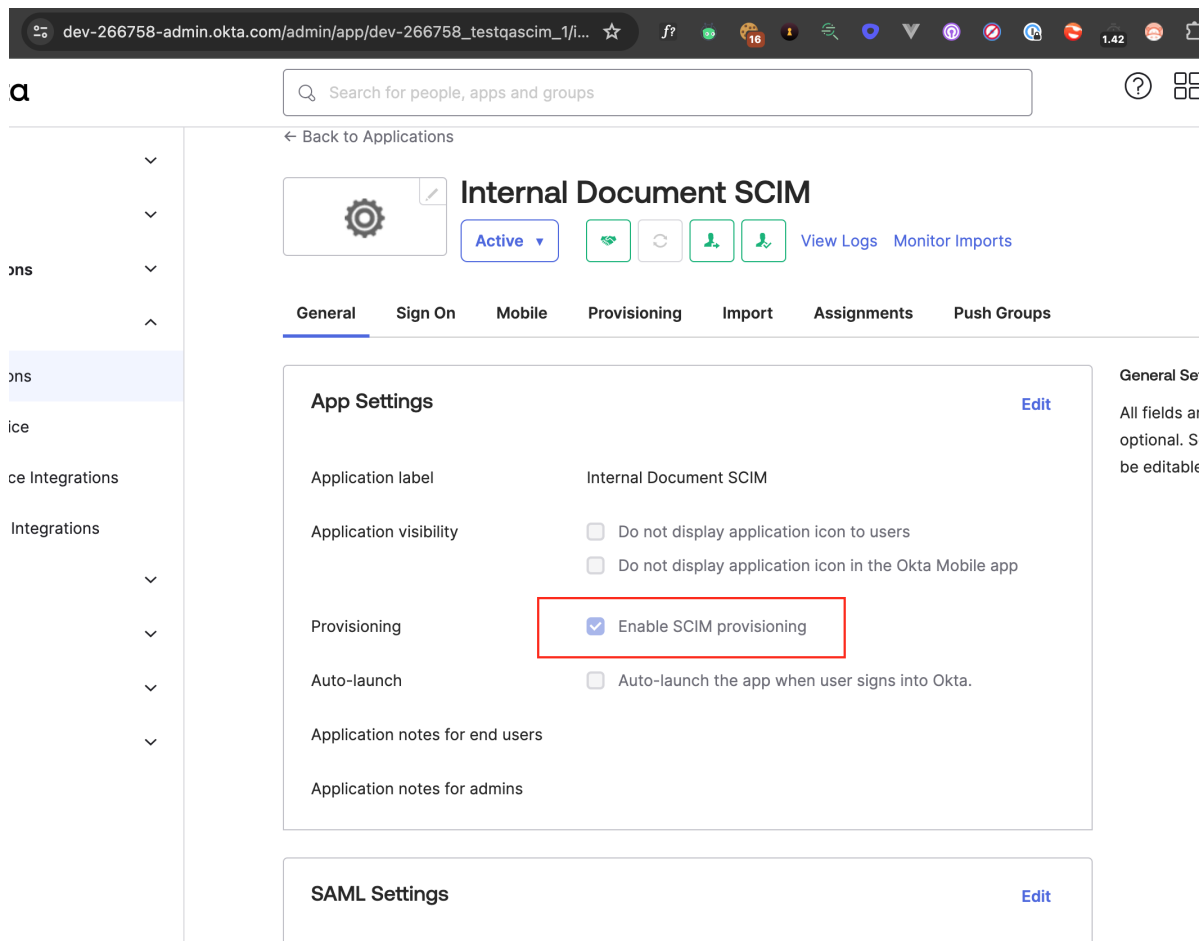
a. Ensure that the **Enable SCIM Provisioning** option is checked under General tab (see 3b below for reference).

b. Paste the generated SCIM API key into the Okta Application. The field can be found on the Provisioning → Integration page

i. SCIM connector base URL: <https://provisioning.leadIQ.com/scim/v2>

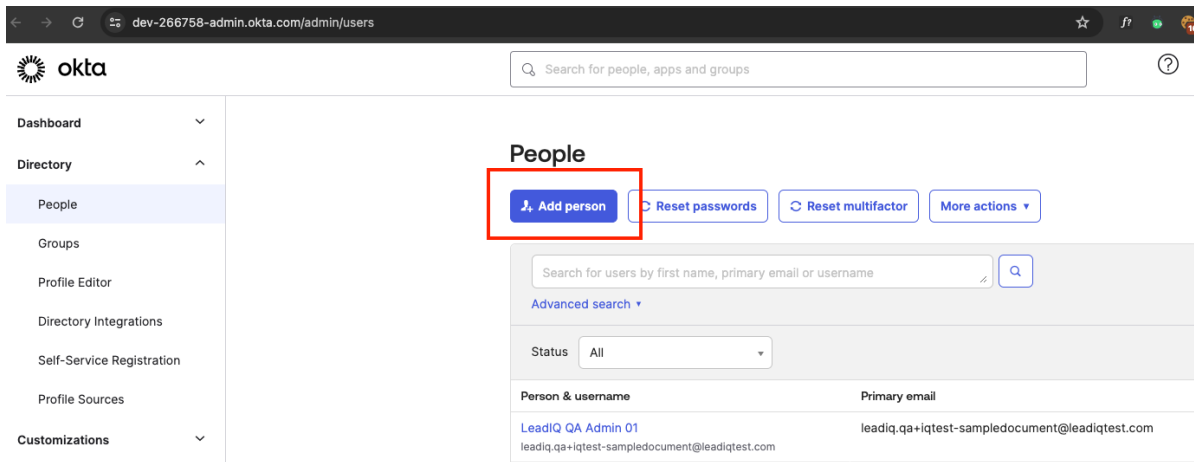
ii. unique Identifier: userName

c. Screenshots:



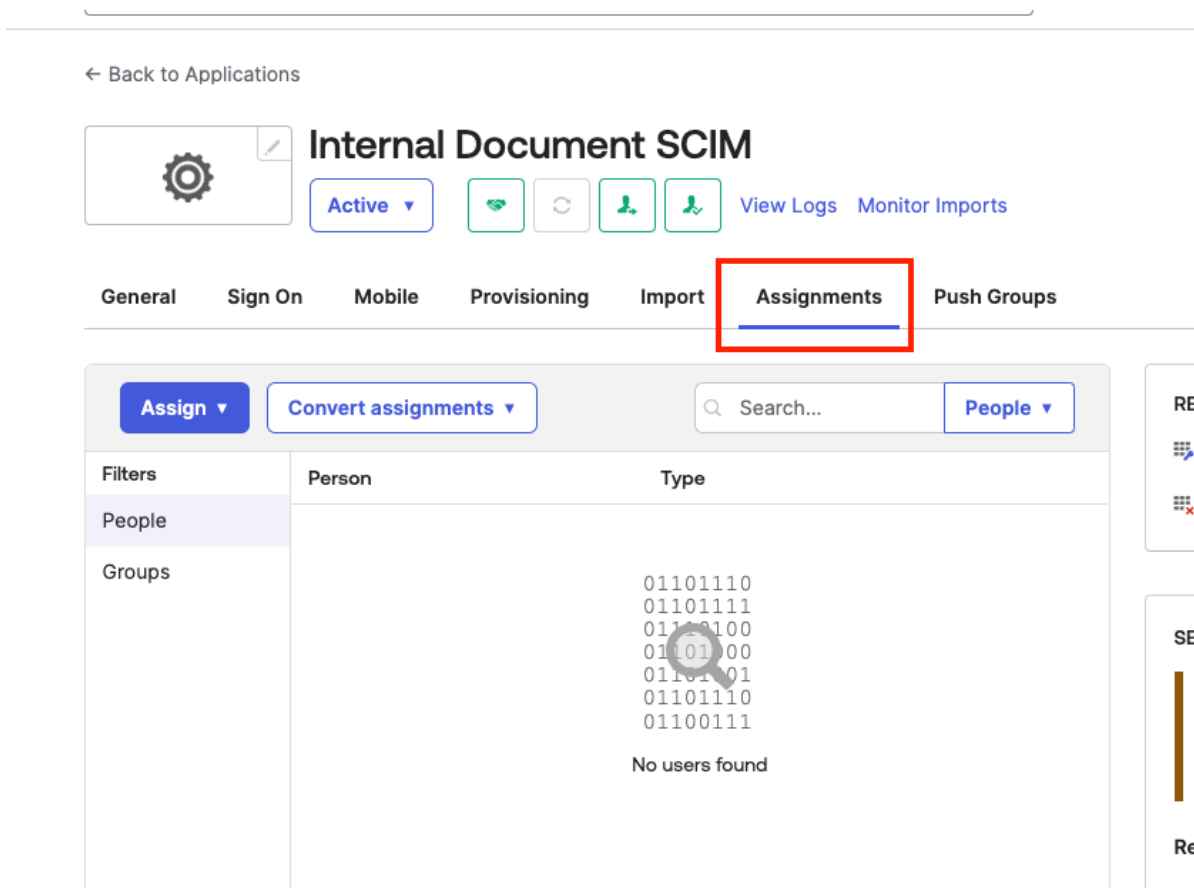
4. Create the LeadIQ Admin's account on Okta (if the team admin does not have an account on Okta).

a. Screenshots:



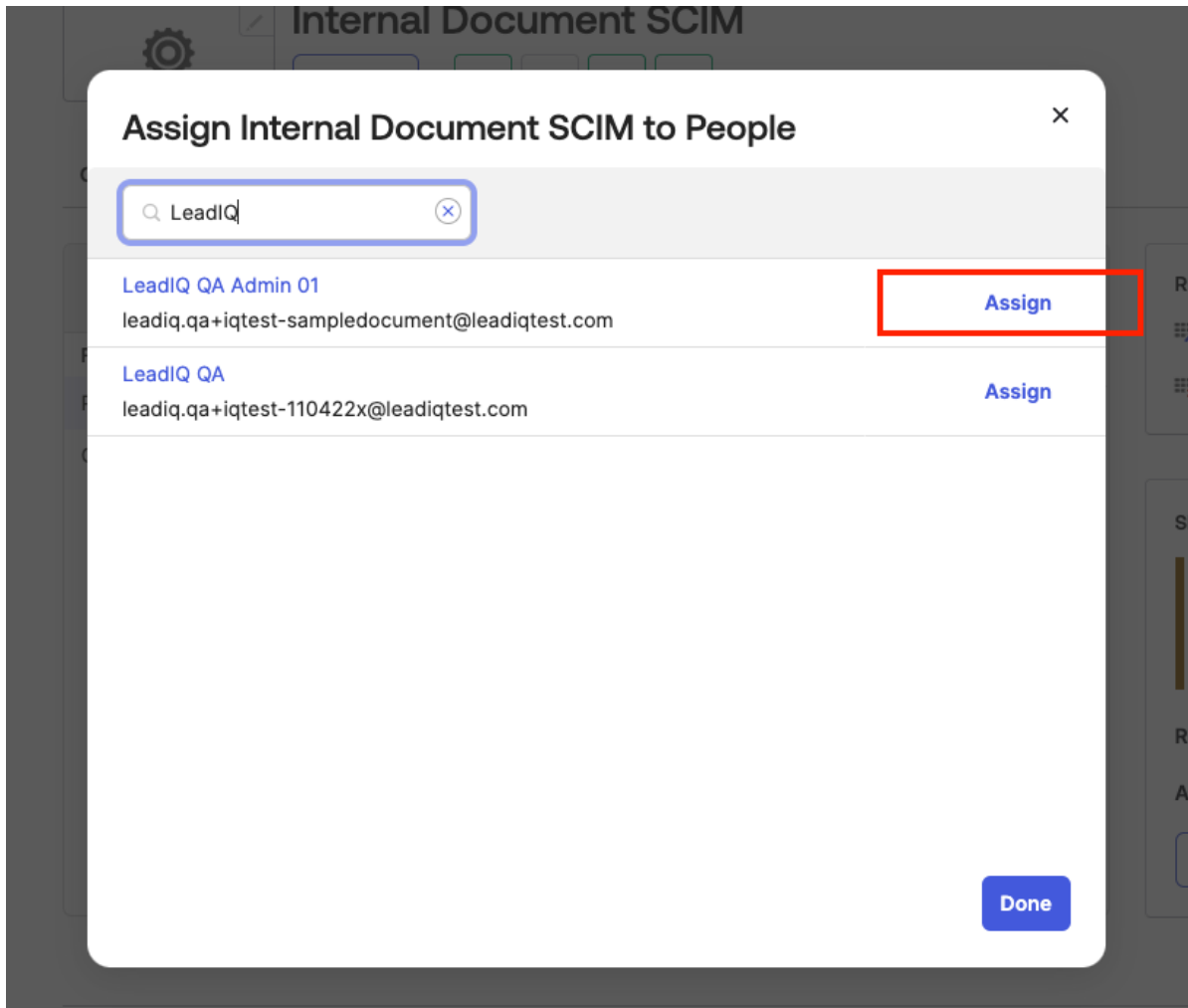
5. After user creation, navigate back to Applications → Applications and select the LeadIQ app. Afterwards, navigate to the Assignments tab.

a. Screenshot:

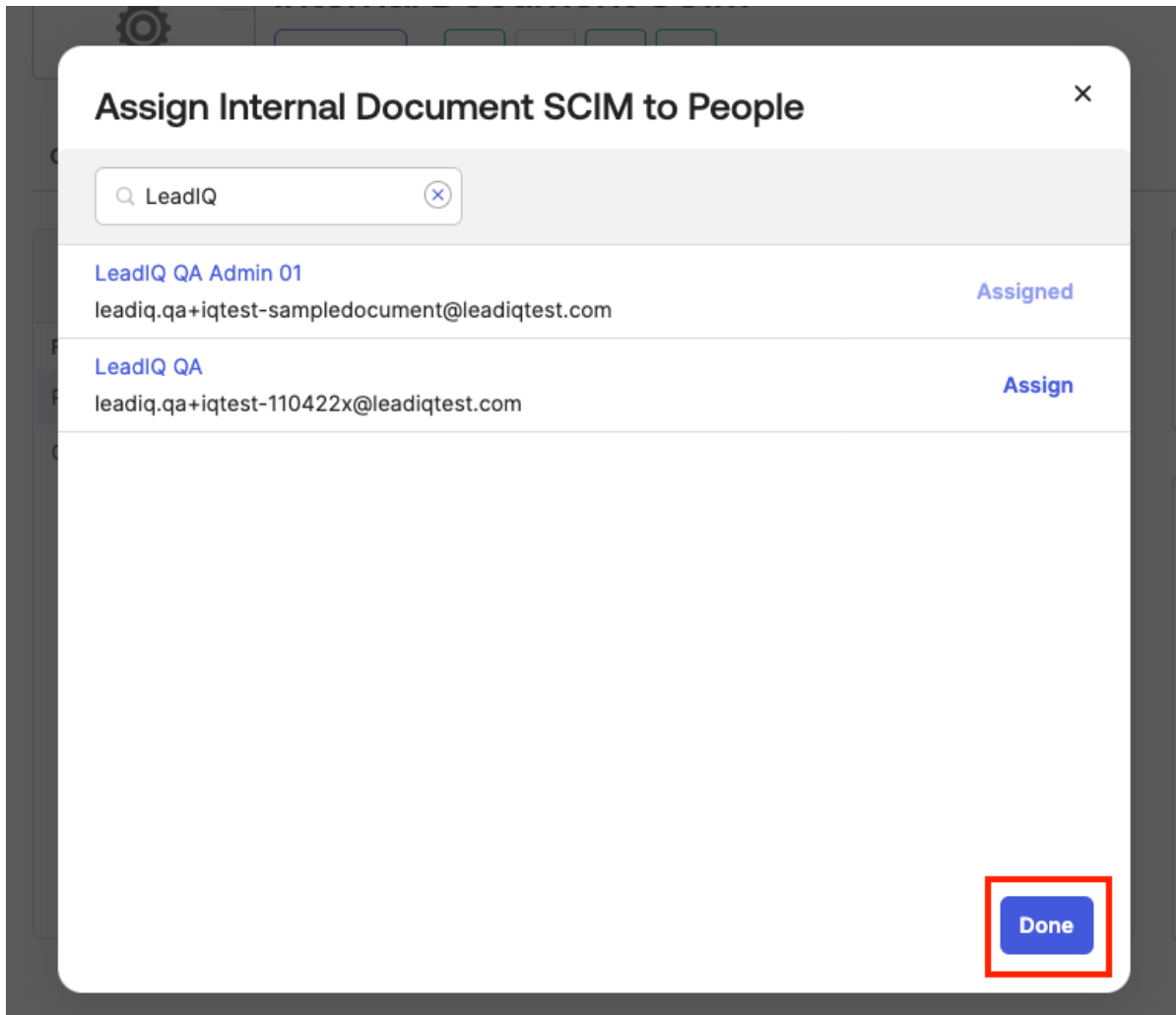


6. Click the Assign button and select Assign to People. Locate the created account from step #4, and click Assign. Click the Save and Go Back button, and then lastly, click the Done button.

a. Screenshots:



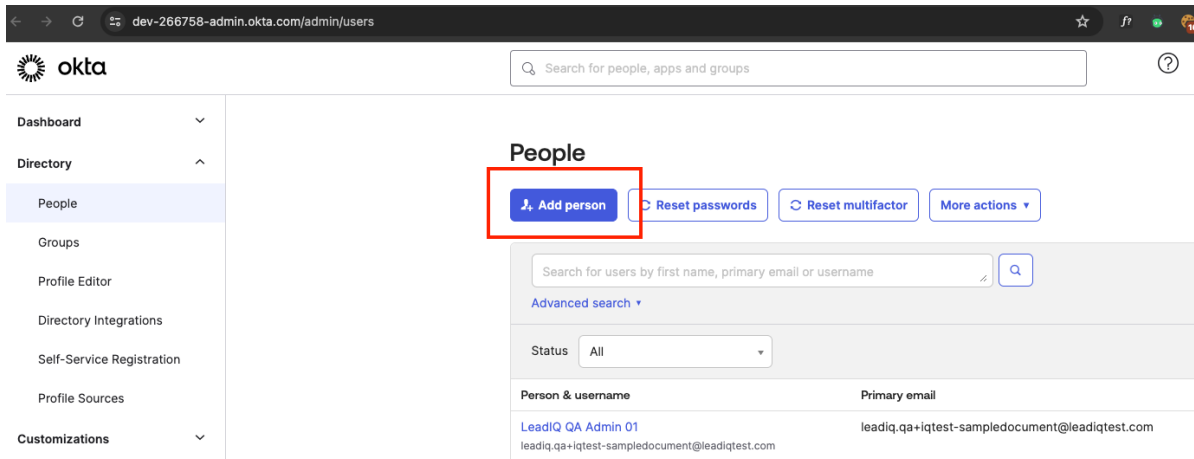
Postal Code	<input type="text"/>
Country	<input type="text"/>
Formatted	<input type="text"/>
Employee number	<input type="text"/>
Manager value	<input type="text"/>
Manager display name	<input type="text"/>
<hr/>	
Preferred language	<input type="text"/>
Locale Name	<input type="text" value="en_US"/>
Time zone	<input type="text"/>
User type	<input type="text"/>
Cost center	<input type="text"/>
Organization	<input type="text"/>
Division	<input type="text"/>
Department	<input type="text"/>
<div><div>Save and Go Back</div><div>Cancel</div></div>	



Provisioning users into the team

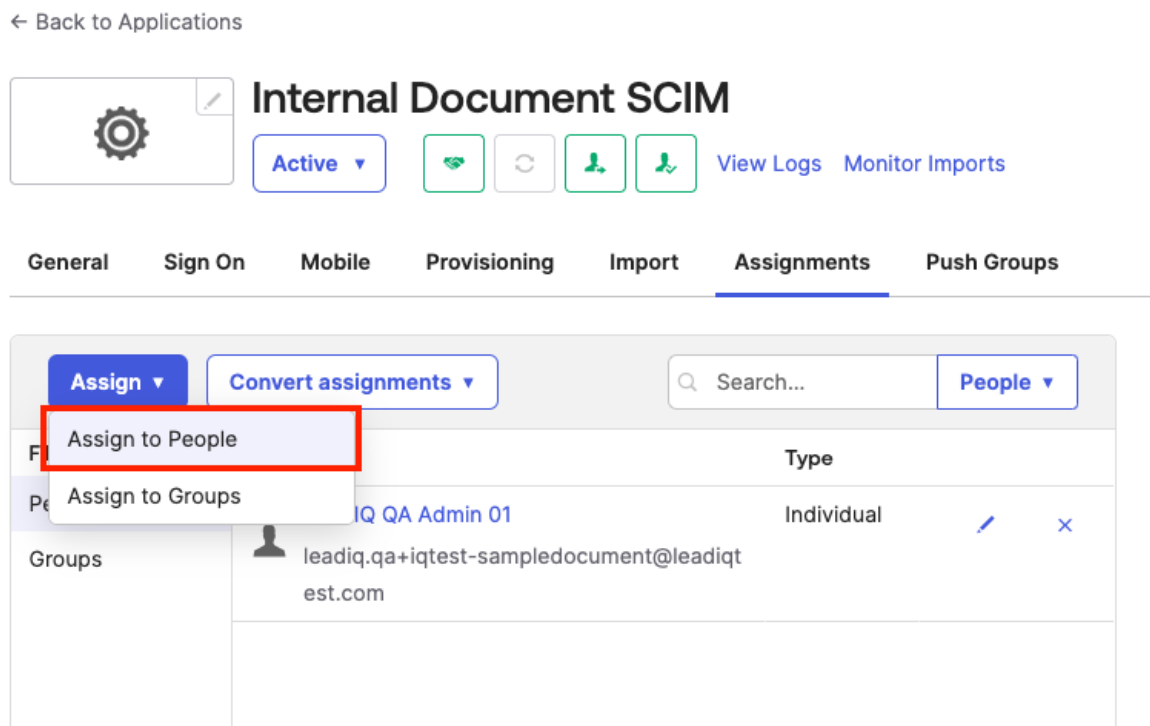
This section includes steps on provisioning users into a team via the SCIM app. Users' accounts will be automatically created and added into the team which the SCIM app is authorized with.

1. Create the user account that is to be provisioned on Okta (if they user does not already exist)
 - a. Screenshot:



2. After creating the user's account, assign the account to the app by navigating to Applications → Applications and select the existing app. Click the Assignments tab and click the Assign button. Locate and assign the user and save all changes.

a. Screenshots:



Assign Internal Document SCIM to People

Search...

Kyle Salazar

kylesiqtest0703@leadiq.com

Assign

Postal Code	<input type="text"/>
Country	<input type="text"/>
Formatted	<input type="text"/>
Employee number	<input type="text"/>
Manager value	<input type="text"/>
Manager display name	<input type="text"/>
<hr/>	
Preferred language	<input type="text"/>
Locale Name	<input type="text" value="en_US"/>
Time zone	<input type="text"/>
User type	<input type="text"/>
Cost center	<input type="text"/>
Organization	<input type="text"/>
Division	<input type="text"/>
Department	<input type="text"/>
<div><div>Save and Go Back</div><div>Cancel</div></div>	

Assign Internal Document SCIM to People



🔍 kyle



Kyle Salazar

kyles@leadiq.com

Assigned

Kyle Salazar

kylesiqtest0703@leadiq.com

Assign

Done

← Back to Applications



Internal Document SCIM

Active ▾



[View Logs](#) [Monitor Imports](#)

General

Sign On

Mobile

Provisioning

Import

Assignments

Push Groups

Assign ▾

Convert assignments ▾

Search...

People ▾

Filters

People

Groups

Person

Type



LeadIQ QA Admin 01

Individual



leadiq.qa+iqtest-sampledokument@leadiqtest.com



Kyle Salazar

Individual



kylesiqtest0703@leadiq.com

3. After the user has been assigned to the app, the user should now be automatically provisioned into the team. The user can now use "Login with SSO" to log into the account.

a. Screenshot:

The screenshot shows the Okta 'Team' management page. The left sidebar contains navigation links for 'MY SETTINGS', 'ADMIN SETTINGS', and 'SYSTEM SETTINGS'. The main content area is titled 'Team' and includes a 'Users' tab. A banner at the top states 'Manage the settings for each group with Group Governance'. Below this, a table lists team members. The user 'Kyle Salazar' is highlighted with a red box. The table columns include 'NAME', 'EMAIL', 'GROUP', 'MANAGING GROUPS', 'INTEGRATIONS', 'STANDARD CREDITS', and 'PREMIUM CREDITS'.

NAME	EMAIL	GROUP	MANAGING GROUPS	INTEGRATIONS	STANDARD CREDITS	PREMIUM CREDITS
Kyle Salazar	kylesiqtest0703@leadiq.com				0 / 500	0 / 30
LeadIQ QA Admin 01	leadiq.qa+iqtest-sampledokument@leadiqtest.com				0 / 500	0 / 30

Unassigning a user from the team

This section includes steps on unassigning a user from a team. Unassigning a user will make the user go into an **inactive** state wherein logins will be blocked but captured leads and account settings are retained.

1. Navigate to Applications → Applications and then select the existing app. Click on the Assignments tab and click the x icon for the user that will be unassigned from the team.

a. Screenshot:

← Back to Applications

Internal Document SCIM

Active ▾ [Icons: Green check, Refresh, Green check, Green check] View Logs Monitor Imports

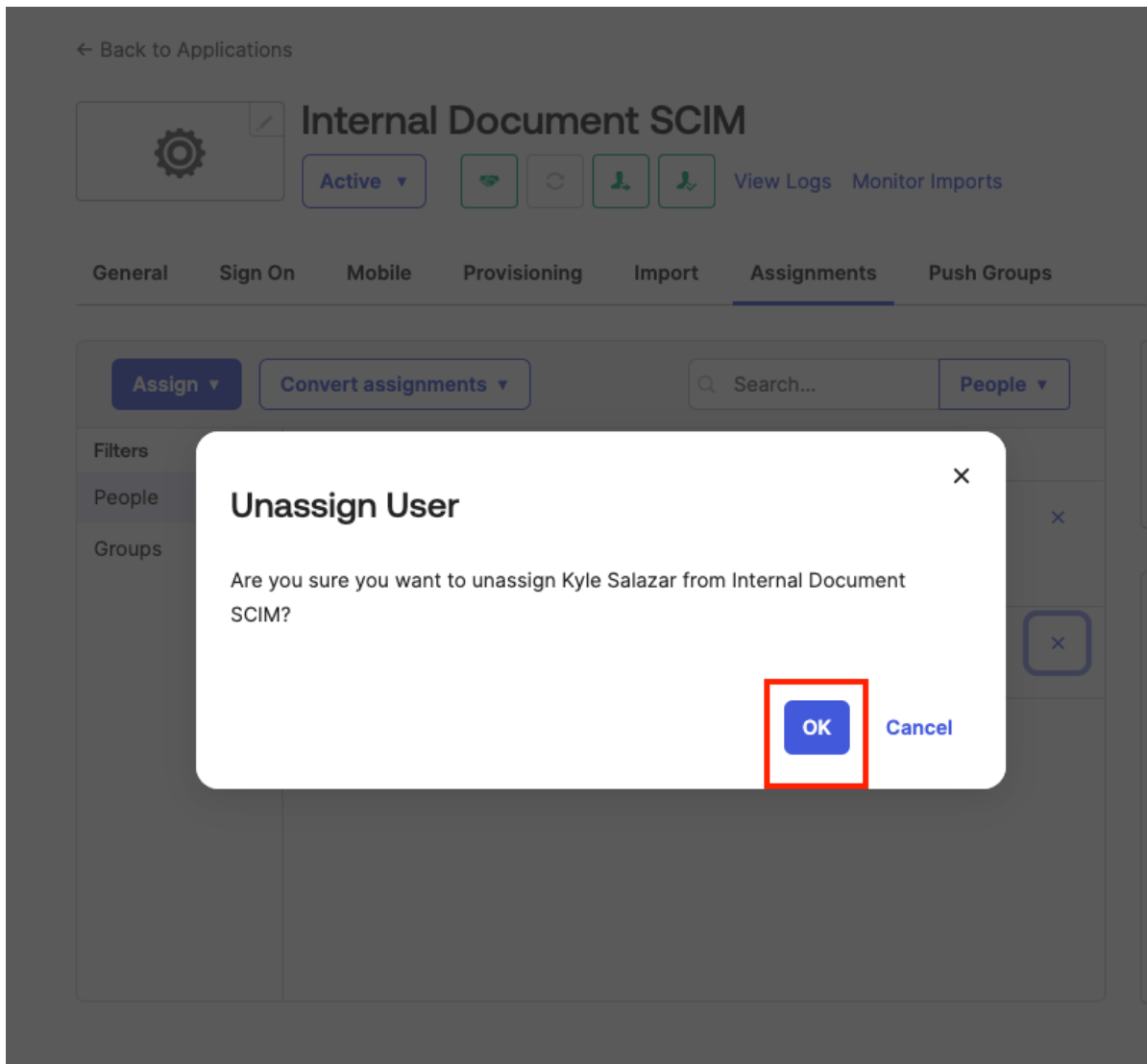
General Sign On Mobile Provisioning Import **Assignments** Push Groups

Assign ▾ Convert assignments ▾ Search... People ▾

Filters	Person	Type
People	LeadIQ QA Admin 01 leadiq.qa+iqtest-sampledokument@leadiqtest.com	Individual
Groups	Kyle Salazar kylesiqtest0703@leadiq.com	Individual

2. Click on the x icon and click OK to proceed with the unassignment.

a. Screenshot:



3. Once a user has been unassigned from a team via Okta, the user will be tagged as **Inactive** in LeadIQ and will no longer be allowed to login regardless of login type (i.e. sign in with Google, email & password, SSO, Microsoft).
 - a. The user's leads will still remain accessible to other team admins and the user's settings will still be intact.
 - b. Only the 'Remove from Team' option will be available for team admins when hovering on inactive users on the 'Team' page in LeadIQ
 - c. Inactive users will not count towards a team's occupied seats when it comes to plan licenses.
 - d. Screenshot:

Team

[Users](#) [Groups & Governance Settings](#) [Reports](#)

Manage the settings for each group with **Group Governance**
[Learn more about group governance](#)

[Upgrade Plan](#)

[+ Invite](#) Your team has 1 members, you can add 4 more.

All Team Members

NAME	EMAIL	GROUP	MANAGING GROUPS	INTEGRATIONS	STANDARD CREDITS	PREMIUM CREDITS
LeadIQ QA Admin 01 Admin	leadiq.qa+iqtest-samledocument@lead...				0 / 500	0 / 30
Kyle Salazar Inactive	kylesiqtest0703@leadiq.com				0 / 500	0 / 30

[Remove from Team](#)

Updating a user's first and last names

A user's first and last names on LeadIQ can be updated by simply updating the user's names on Okta. As of writing, only these two fields can be updated.

1. Go to Okta, and navigate to Directory → People
2. Select the user to be updated

a. Screenshot:

Dashboard

Directory

People

Groups

Profile Editor

Directory Integrations

Self-Service Registration

Profile Sources

Customizations

Applications

People

[Add person](#) [Reset passwords](#) [Reset multifactor](#) [More actions](#)

Search for users by first name, primary email or username

Advanced search

Status: All

Showing 17 of 17

Person & username	Primary email	Status
Kyle Salazar kylesiqtest0703@leadiq.com	kylesiqtest0703@leadiq.com	Active
LeadIQ QA Admin 01 leadiq.qa+iqtest-samledocument@leadiotest.com	leadiq.qa+iqtest-samledocument@leadiotest.com	Active

3. Navigate to the Profile tab and click Edit

a. Screenshot:

Kyle Salazar

kylesiqtest0703@leadiq.com

[Reset Password](#)

[More Actions](#) ▼

 User  Active [View Logs](#)

[Applications](#) [Groups](#) [Profile](#) [Admin roles](#)

Attributes

Username login	kylesiqtest0703@leadiq.com
First name firstName	Kyle
Last name lastName	Salazar
Middle name	

[Edit](#)

Profile

A profil
that de
apps ar
attribut

4. Update either the user's first or last name, or update both names and save the changes.

a. Screenshot:

Kyle Kjell Salazar II

kylesiqtest0703@leadiq.com

[Reset Password](#)

[More Actions](#) ▼

 User  Active [View Logs](#)

[Applications](#)

[Groups](#)

[Profile](#)

[Admin roles](#)

Attributes

[Edit](#)

Username
login kylesiqtest0703@leadiq.com

First name
firstName Kyle Kjell

Last name
lastName Salazar II

5. The user's name on LeadIQ web app will now be updated as well

a. Screenshot:

Team

Users

Groups & Governance Settings

Reports

Manage the settings for each group with
Group Governance

[Learn more about group governance](#)

+ Invite

Your team has 2 members, you can add 3 more.

All Team Members



NAME



EMAIL



GROUP



Kyle Kjell Salazar II

kylesiqtest0703@leadIQ.com



LeadIQ QA Admin 01

Admin

leadIQ.qa+iqtest-sampledokument@lead...

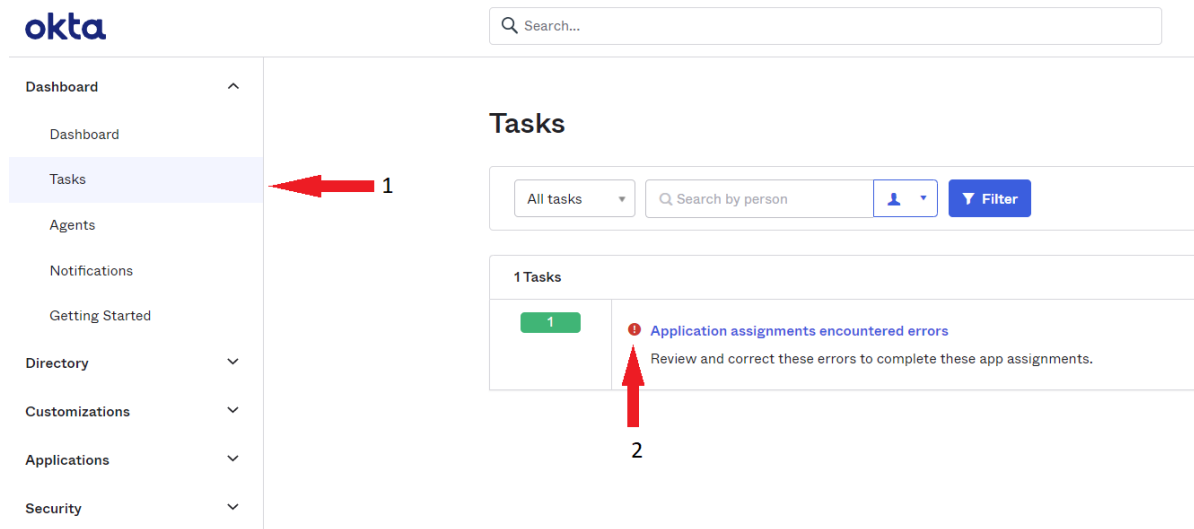
Errors

Error: "Automatic provisioning of user John Doe to app LeadIQ failed:
Matching user not found."

Solution:

1. Go to Okta Admin Console and navigate to Applications > LeadIQ > Provisioning > To App
2. Click Edit. Select the Provisioning Feature "Create Users" (this allows Okta to create user accounts in LeadIQ). Click Save.

3. Do the same for "Update User Attributes" and "Deactivate Users" if you haven't already done so. Click Save.
4. Afterward, attempt the user provisioning again. Navigate to Dashboard > Tasks. Any failed assignments should appear under Tasks.



1. After identifying the failed task for the user that should be retried, click on Retry Selected

SCIM Groups

At a high level, this allows the user to do the following on Okta which will then be reflected on the user's LeadIQ groups, given that the groups are linked:

1. Create a group
 - a. A group created and pushed from Okta will create a corresponding LeadIQ group.
2. Link an Okta group to an existing LeadIQ group
 - a. An Okta group can be linked to an existing LeadIQ group so that group assignments can be easily managed through Okta.
3. Update a group's name

- a. Updating a linked group on Okta will update the linked LeadIQ group's name.
- 4. Assign a team member to a group
 - a. Assigning a team member to an Okta group will assign the same member to the corresponding linked LeadIQ group.
- 5. Unassign a team member from a group
 - a. Removing a team member from an Okta group will also unassign the same member from the corresponding linked LeadIQ group and move them back to the default group.
- 6. Unlink a group
 - a. Unlinking an Okta group has two possible results based on user's preference. One is they can delete the linked LeadIQ group along with the pushed Okta group, or retain it and just delete the pushed Okta group. Selecting the latter will preserve the state of the LeadIQ group and its group assignments.

Pre-conditions:

- 1. Access to Okta with:
 - a. permission to create, update, and push groups and group assignments
 - b. permission to edit applications
- 2. A LeadIQ team that will be used for provisioning
- 3. The SCIM app on Okta
- 4. Existing team has SCIM enabled and has a valid SCIM Token

Setup

The assumption in this document is that SCIM has already been previously set up for your team.

1. On Okta, navigate to the application and under the Provisioning tab, enable the **Push Groups** setting:

a. Screenshot:

The screenshot shows the 'Internal Document SCIM' configuration page in Okta. The 'Provisioning' tab is selected. On the left sidebar, 'Integration' is highlighted. The main content area is titled 'SCIM Connection' and includes the following fields:

- SCIM version: 2.0
- SCIM connector base URL:
- Unique identifier field for users:
- Supported provisioning actions:
 - ☐ Import New Users and Profile Updates
 - ☒ Push New Users
 - ☒ Push Profile Updates
 - ☒ **Push Groups** (highlighted with a red box)
 - ☐ Import Groups
- Authentication Mode:
- HTTP Header:
 - Authorization:

At the bottom right, there is a 'Test Connector Configuration' button, a 'Save' button, and a 'Cancel' button.

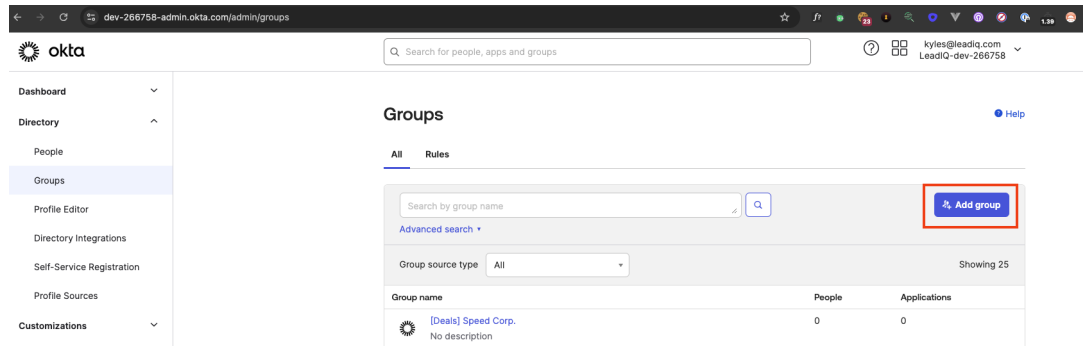
This is all that is needed to be additionally set up for group management.

Creating and pushing a group:

This section includes creating an Okta group and pushing the group to be created on LeadIQ.

1. Create the group to be pushed to LeadIQ:

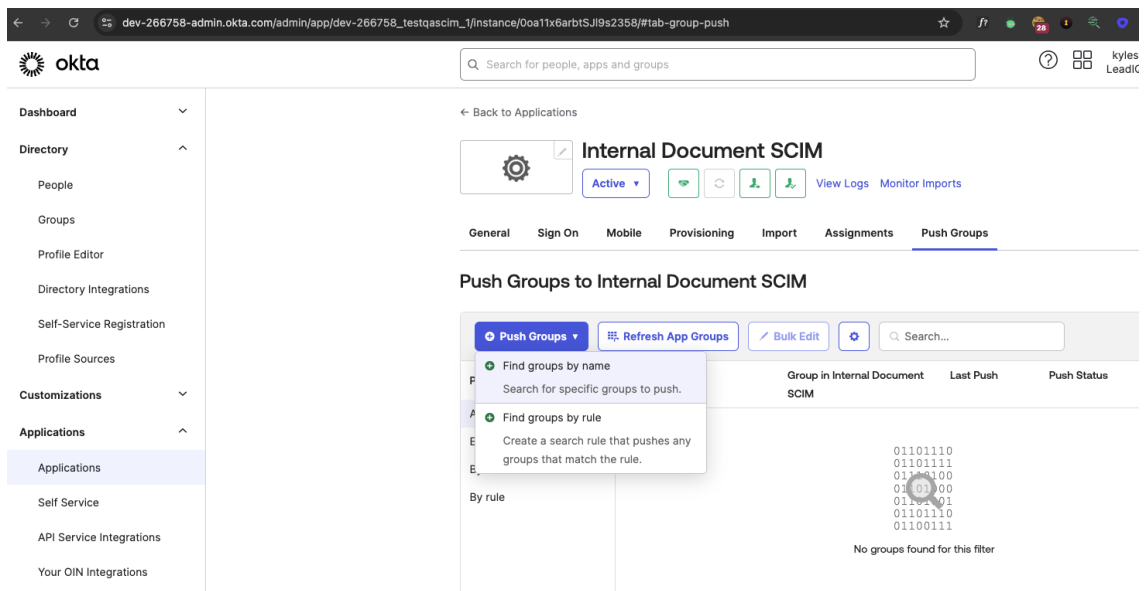
a. Screenshot:



2. Once the Okta group has been created, navigate to the application page and under the **Push Groups** tab, click **Push Groups** and select the **Find groups by name** option:

a. Additionally, you can use the **Find groups by rule** option to push multiple groups in one go by setting a rule. An example rule is shown on the second screenshot below.

b. Screenshot:



Push Groups to Internal Document SCIM

Close

Pushed Groups

All

Errors

By name

By rule

Push groups by rule

Create a search rule that pushes any matching groups to Internal Document SCIM automatically.

Rule name

Groups that contain the word 'internal'

Group name

contains

internal

Group description

starts with

Enter string to match...

☒ Immediately push groups found by this rule

Create Rule

Cancel

3. Search for the created group's name and select it.

- a. ▲ Keep the setting **Push group memberships immediately** (found underneath the group name field) checked if you want the group and group assignments to be created and implemented immediately upon pushing the group. Otherwise, untick the checkbox.

b. Screenshot:

Push Groups to Internal Document SCIM

Close

Pushed Groups

All

Errors

By name

By rule

Push groups by name

To sync group memberships from Okta to Internal Document SCIM, choose a group in Okta and a group in the app.

Internal Doc

☒ Internal Documentation Group
No description

4. For this section, we'll leave the push action set to the **Create Group** option. Click the Save button.


a. Screenshot:

Push groups by name

To sync group memberships from Okta to Internal Document SCIM, choose a group in Okta and a group in the app.

Internal Documentation Group

☒ Push group memberships immediately

Group	Match result & push action
 Internal Documentation Group	No match found + Create Group ▾


Internal Documentation G

[Save](#) [Save & Add Another](#)

5. Once the group has been pushed, you will be redirected to the list of groups by name and here you will be able to see the groups that are managed via Okta. At this point, the group should now be created on LeadIQ.
- The first column on the screenshot below refers to the Okta group.
 - The second column refers to the LeadIQ group.
 - The third column is the date & time when the last push was made.
 - The fourth column refers to the group's state.

e. Screenshot:

← Back to Applications





Internal Document SCIM

Active View Logs Monitor Imports

General Sign On Mobile Provisioning Import Assignments **Push Groups**

Push Groups to Internal Document SCIM

Push Groups Refresh App Groups Bulk Edit Search...

Pushed Groups	Group in Okta	Group in Internal Document SCIM	Last Push	Push Status
All	 Internal Documentation	 Internal Documentation	September 11, 2024 at 1:08:40 PM GMT+8	Active ⌵ ⓘ
Errors				
By name				
By rule				

account.leadIQ.com/app/settings/team/groups/

MY SETTINGS

Account

Integrations

Identify

Track

Scribe

ADMIN SETTINGS

Manage Plan

Team

ICP/Persona

SYSTEM SETTINGS

Data Privacy

API Keys

Team

Users **Groups & Governance Settings** Reports

Manage the settings for each group with **Group Governance**

Learn more about group governance

Upgrade Plan

What are some good suggestions?

Get creative and create groups around your organization structure such as EMEA SDRs, Western Regional Sales Reps, Revenue Tier 1, John's Team. Or group your members by title, for example SDRs, AEs, or Sales Managers.

Learn more about manager role

Create Group

Group Name	Members	Group Managers
Default	2	Group governance
Internal Documentation Group	9	Group governance Delete

Linking an Okta group to an existing LeadIQ group:

⚠ IMPORTANT: When an Okta group is linked to an existing LeadIQ group, the member assignments on Okta will override the member assignments that were made manually on LeadIQ. Members assigned only to the linked LeadIQ group and not to the Okta group will be removed from the LeadIQ group when a link is established.

This section covers linking an Okta group to an existing LeadIQ group so group assignments can be done on Okta and changes will be reflected on the LeadIQ group.

1. Create the group to be linked to the LeadIQ group:

- a. The group can either have the same name as the LeadIQ group, or a different name. If it's the latter, the LeadIQ group's name will be updated to match the Okta group's name. For this document, we will be using a different name.

b. Screenshot:

What are some good suggestions?

Get creative and create groups around your organization structure such as EMEA SDRs, Western Regional Sales Reps, Revenue Tier 1, John's Team. Or group your members by title, for example SDRs, AEs, or Sales Managers.

[Learn more about manager role](#)


[+ Create Group](#)

Group Name ↑↓	Members ↑↓	Group Managers ↑↓
Default	2	
Internal Documentation Group - Prospector	0	

Groups

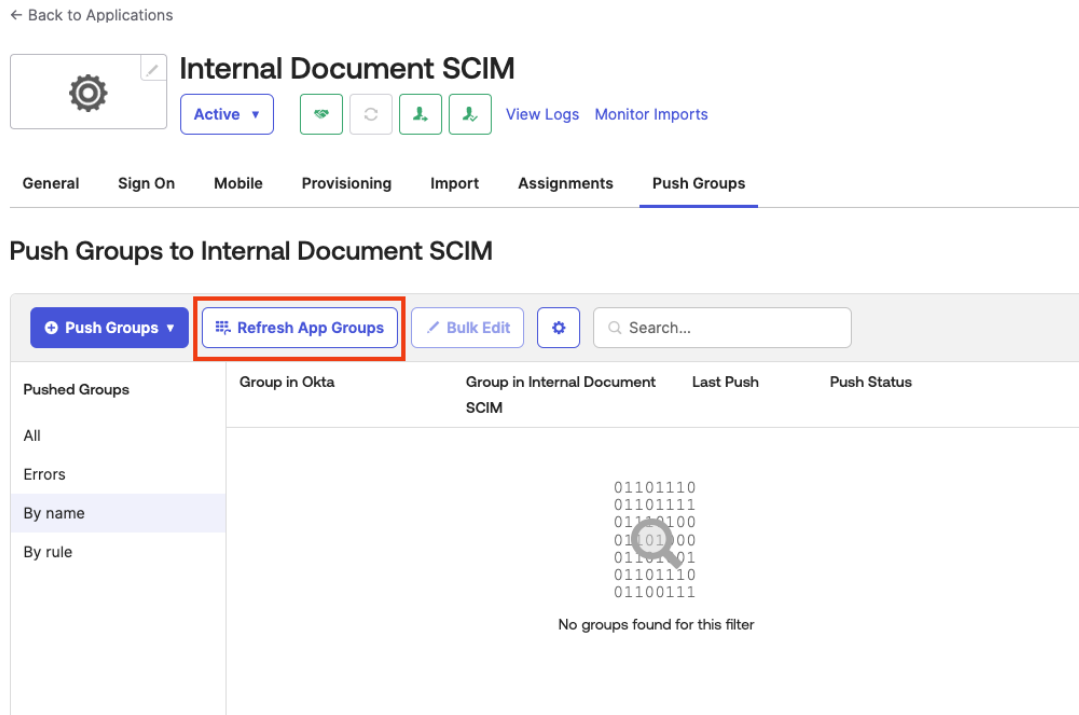
[Help](#)

All Rules

<input type="text" value="Search by group name"/>			<input type="button" value="Q"/>	<input type="button" value="Add group"/>
Advanced search				
Group source type	<input type="text" value="All"/>	Showing 25		
Group name	People	Applications		
 Internal Documentation Group - Okta No description	0	0		

2. Navigate to the application page and under the **Push Groups** tab, click the **Refresh App Groups** button so that Okta will be able to retrieve the currently available groups on LeadIQ.

a. Screenshot:



3. Click the **Push Groups** button and select the **Find by name** option. Select the created Okta group and set the push action to **Link Group**. On the text field, search for the LeadIQ group. Click the Save button.

a. Screenshot:

Push Groups to Internal Document SCIM

Close

Pushed Groups

All

Errors

By name

By rule

Push groups by name

To sync group memberships from Okta to Internal Document SCIM, choose a group in Okta and a group in the app.

Internal Documentation Group - Okta

☒ Push group memberships immediately

Group	Match result & push action
<div><div></div>Internal Documentation Group - Okta</div>	<div>No match found</div> <div><div><div>Link Group</div></div></div> <div><div>Internal Documentation Group - Prospector</div></div> <div><div><div></div>Linking to this group will rename the group in Internal Document SCIM</div></div>

Save

Save & Add Another

4. Once the link has been established and the Okta group has been pushed, it will appear on the list of pushed groups and the LeadIQ group should be updated to have the same name as the Okta group. Member assignments made on the Okta group will then be reflected on the LeadIQ group.
- a. Screenshot:

<div><div></div>Internal Documentation</div>	<div><div></div>Internal Documentation</div>	<div>September 11, 2024 at 1:33:59 PM GMT+8</div>	<div>Active</div>	<div></div>
<div><div>Internal Documentation Group - Okta</div><div>0</div><div><div>Group governance</div><div>Delete</div></div></div>				

Note: The cases below work under the assumption that an Okta group is already linked to a LeadIQ group and the Okta group has been pushed.

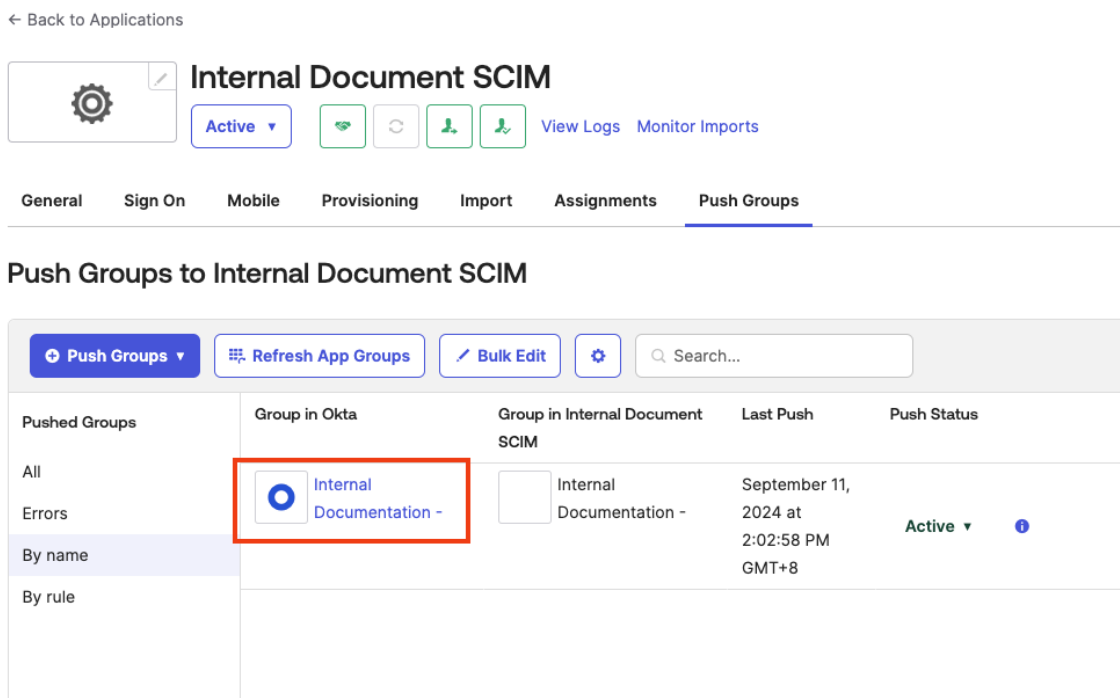
Additionally, the assumption for group assignments is that the team members are provisioned on Okta.

Updating a group's name:

This section covers updating a group's name both on Okta and Prospector given that the groups are linked, and the Okta group has been pushed.

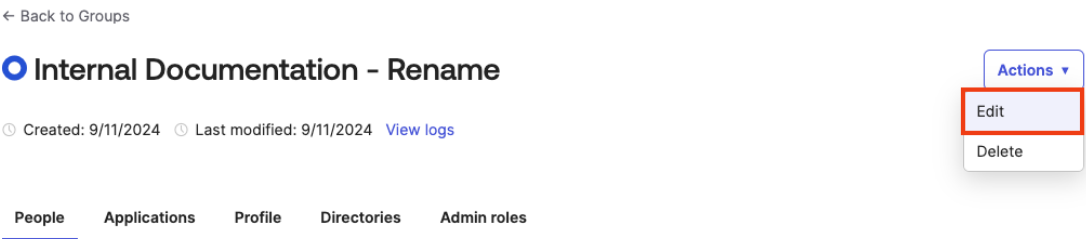
1. Select the group on the **Push Groups** page.

a. Screenshot:



2. Click the Edit option under the Actions button.

a. Screenshot:



3. Update the group's name and save the name.



a. Screenshot:

4. The name should now be updated on both Okta and LeadIQ.

a. Screenshot:

[← Back to Groups](#)

Internal Documentation - Rename (Updated)

 Created: 9/11/2024  Last modified: 9/11/2024 [View logs](#)

[People](#) [Applications](#) [Profile](#) [Directories](#) [Admin roles](#)

[Internal Documentation - Rename \(Updated\)](#)

0

[Group governance](#) [Delete](#)

Assign a team member to a group:

⚠ IMPORTANT: A team member can only be part of one group at a time. If a team member is assigned to another Okta group while still in a different group,


the group push will fail and the member will not be assigned. The member has to be unassigned first from the current Okta group before getting reassigned to a new group.

This section covers assigning a team member to an Okta group and that the member assignment is reflected on the LeadIQ group.

1. Select the group on the **Push Groups** page





a. Screenshot:

← Back to Applications



Internal Document SCIM

Active ▾



[View Logs](#) [Monitor Imports](#)

General

Sign On

Mobile

Provisioning

Import

Assignments


Push Groups




Push Groups to Internal Document SCIM

+ Push Groups ▾

Refresh App Groups

Bulk Edit



Pushed Groups	Group in Okta	Group in Internal Document SCIM	Last Push	Push Status
All	<div> Internal Documentation -</div>	<div> Internal Documentation -</div>	September 11, 2024 at 2:02:58 PM GMT+8	Active ▾ 
Errors				
By name				
By rule				

2. Click the Assign People button

a. Screenshot:

← Back to Groups

Internal Documentation - Rename (Updated)

Actions ▾

🕒 Created: 9/11/2024 🕒 Last modified: 9/11/2024 [View logs](#)

People Applications Profile Directories Admin roles


People

⋮ ▾ **Assign people**

Advanced search ▾

Showing 0 of 0

Person & username	Status
-------------------	--------

- Search for the team member to add to the group and click the  button, afterwards click the **Done** button.

a. Screenshot:

Assign people to Internal Documentation - Rename (Updated)


Done

More actions ▾

Advanced search ▾

Showing 1

Person & username	Status
John Diaz leadiq.qa+iqtest-060924b@leadiqtest.com	Active



- The team member should now be assigned to the LeadIQ group. The push status for the Okta group should be set to Active.

a. Screenshot:

Internal Documentation - Rename (Updated)

[← Back to Groups](#)



Group Governance

Members

+ Add Member

Your group has 1 members.

<input type="checkbox"/>	NAME 🔍	EMAIL 🔍	MANAGING GROUPS ⓘ
<input type="checkbox"/>	John Diaz	leadiq.qa+iqtest-060924b@leadiqtest.com	


	Internal Documentation -		Internal Documentation -	September 11, 2024 at 2:36:27 PM GMT+8	Active ▾	ⓘ
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Unassign a team member from a group:

This section covers unassigning a team member from an Okta group.

1. Select the group on the [Push Groups](#) page.
 - a. Screenshot:

← Back to Applications





Internal Document SCIM

Active ▾[View Logs](#)[Monitor Imports](#)

GeneralSign OnMobileProvisioningImportAssignmentsPush Groups

Push Groups to Internal Document SCIM

<div>+ Push Groups ▾Refresh App GroupsBulk Edit<input type="text" value="Search..."/></div>				
Pushed Groups	Group in Okta	Group in Internal Document SCIM	Last Push	Push Status
All	 Internal Documentation -	 Internal Documentation -	September 11, 2024 at 2:02:58 PM GMT+8	Active ▾
Errors				
By name				
By rule				

2. Click the  button for the team member to be unassigned from group.

a. Screenshot:

← Back to Groups

Internal Documentation - Rename (Updated)

Created: 9/11/2024Last modified: 9/11/2024[View logs](#)


PeopleApplicationsProfileDirectoriesAdmin roles

People

...Assign people

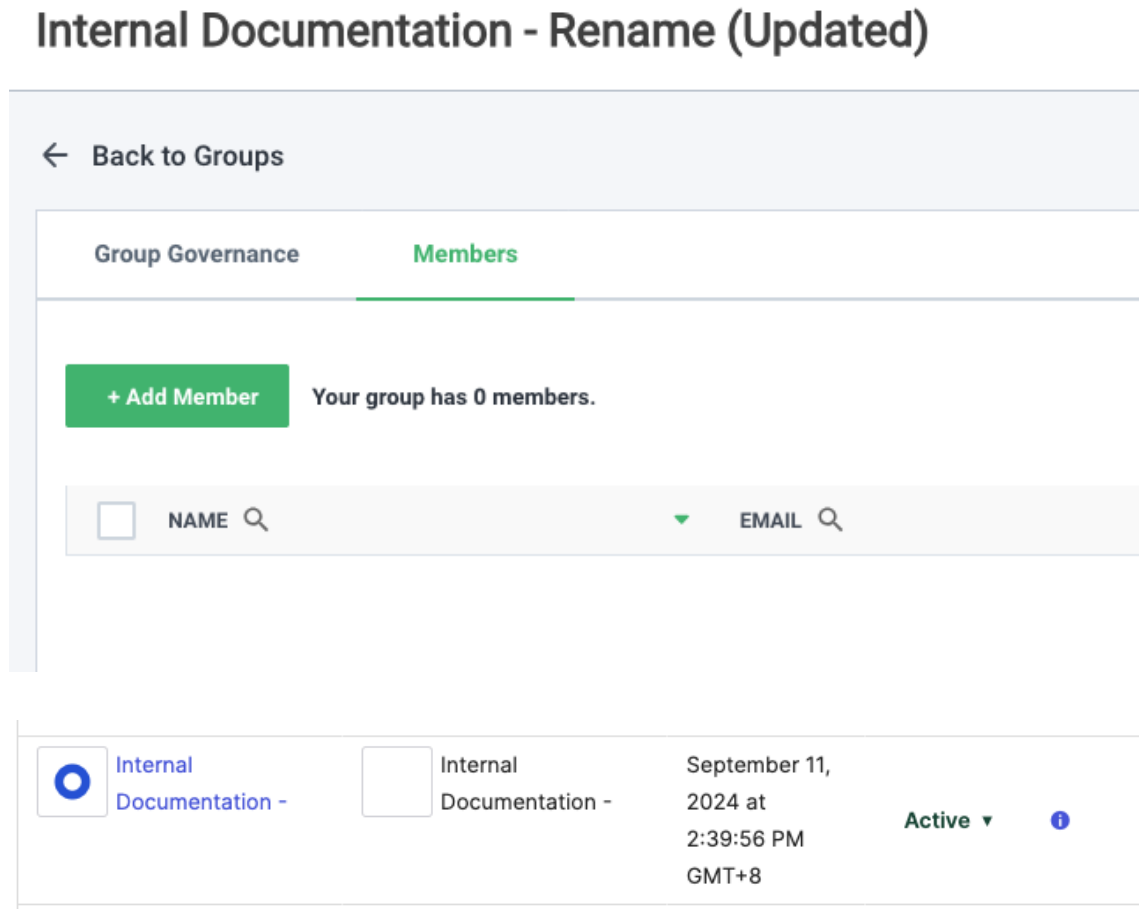
Advanced search ▾

Showing 1 of 1

Person & username	Status	
John Diaz leadidq.qa+iqtest-060924b@leadidqtest.com	Active	

Person & username	Status	
John Diaz leadidq.qa+iqtest-060924b@leadidqtest.com	Active	Removed Assign

3. Once unassigned, the member should no longer be a member of the LeadIQ group. The push status for the Okta group should be set to Active.
 - a. Screenshot:



Unlink a group (Delete Both Strategy):

This section covers unlinking a group on Okta following the **Delete the group in the target app** strategy which deletes the pushed Okta group and the linked LeadIQ group. By doing this, assigned members will be unassigned from the LeadIQ group.

1. On the **Push Groups** page, click the Active status for the group to be unlinked. Click the **Unlink pushed group** option.

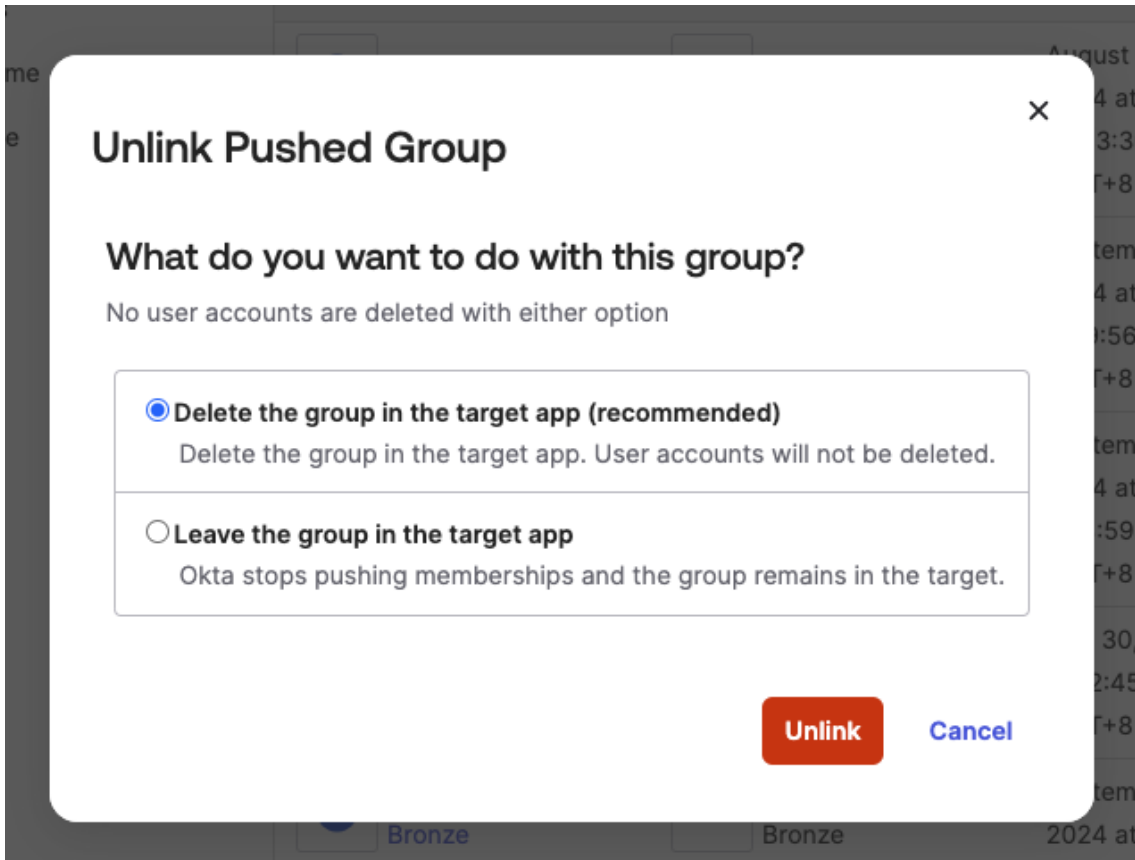
a. Screenshot:

The screenshot shows the 'Push Groups' management interface in Okta. At the top, there are buttons for 'Push Groups', 'Refresh App Groups', 'Bulk Edit', and a search bar. Below the buttons is a table with columns: 'Group in Okta', 'Group in Test SCIM', 'Last Push', and 'Push Status'. The table lists several groups, including 'Internal Documentation' and 'My Other Group'. A context menu is open over the 'Internal Documentation' group, showing options: 'Deactivate group push', 'Unlink pushed group' (highlighted with a red border), and 'Push now'. The 'Unlink pushed group' option includes the text: 'Stop pushing group memberships and optionally delete the pushed group.'.

Group in Okta	Group in Test SCIM	Last Push	Push Status
1 group has an error. Click Retry All Groups to re-push all groups that have an error.			
No description	No description	August 30, 2024 at 12:03:36 PM GMT+8	Active
Internal Documentation -	Internal Documentation -	September 11, 2024 at 2:39:56 PM	Active
Internal Documentation	Internal Documenta		
My Other Group My other peeps	My Other C My other p		
Tokyo Sales Team Bronze	Tokyo Sale Bronze		

2. Select the **Delete the group in the target app (recommended)** strategy and click Unlink.

a. Screenshot:



- Once the pushed group has been unlinked, the LeadIQ group should be deleted and the members should be unassigned from the LeadIQ group.

a. Screenshot:

Disabled New Group	0	Group governance	Delete
Internal Documentation Group - Prospector	0	Group governance	Delete
Michigan Prospecting Team	0	Group governance	Delete

<input type="checkbox"/>	John Diaz	leadliq.qa+iqtest-060924b@leadliqtest.c...	Internal Documentation - ...		0 / 00	0 / 200	...
<input type="checkbox"/>	John Diaz	leadliq.qa+iqtest-060924b@leadliqtest.c...			0 / 00	0 / 200	

Unlink a group (Retain Strategy):

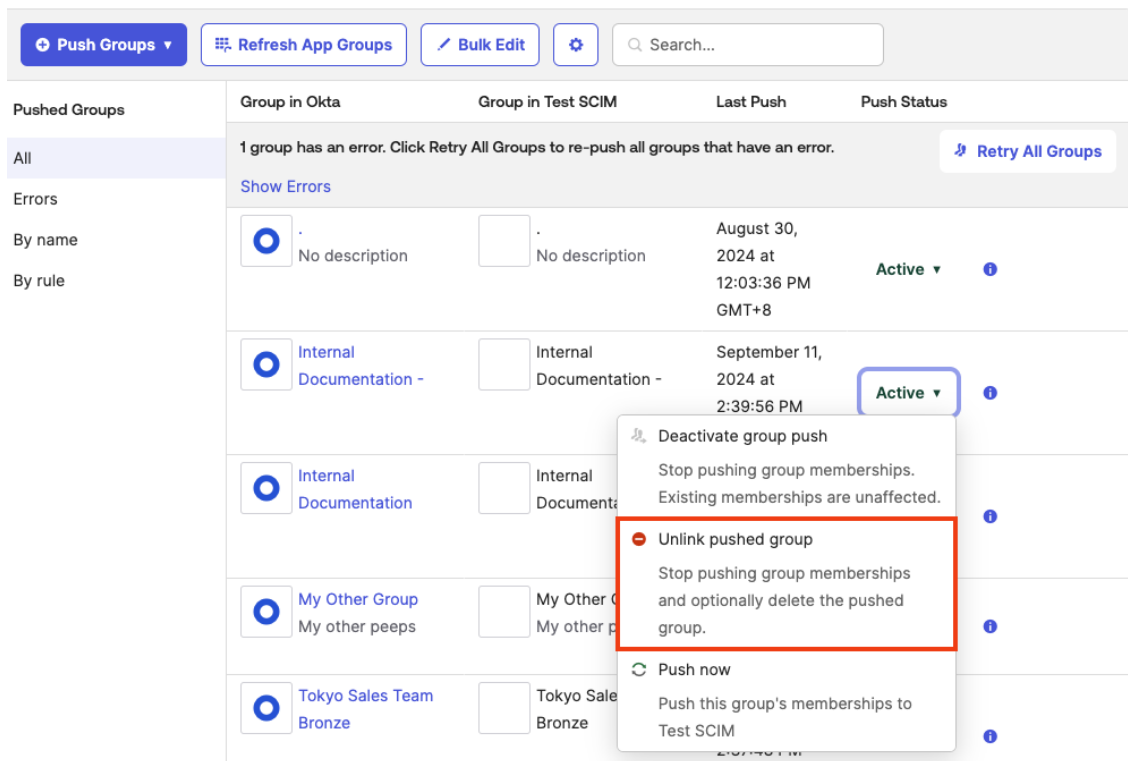
⚠ IMPORTANT: After doing this, team members assigned on the unlinked Okta group should be unassigned from the LeadIQ group first before getting

reassigned to a new Okta group. Otherwise the new assignment will fail since the member is still part of a LeadIQ group.

This section covers unlinking a group on Okta following the **Leave the group in the target app** strategy which deletes the pushed Okta group but retain the linked LeadIQ group. By doing this, assigned members will be retained on the LeadIQ group.

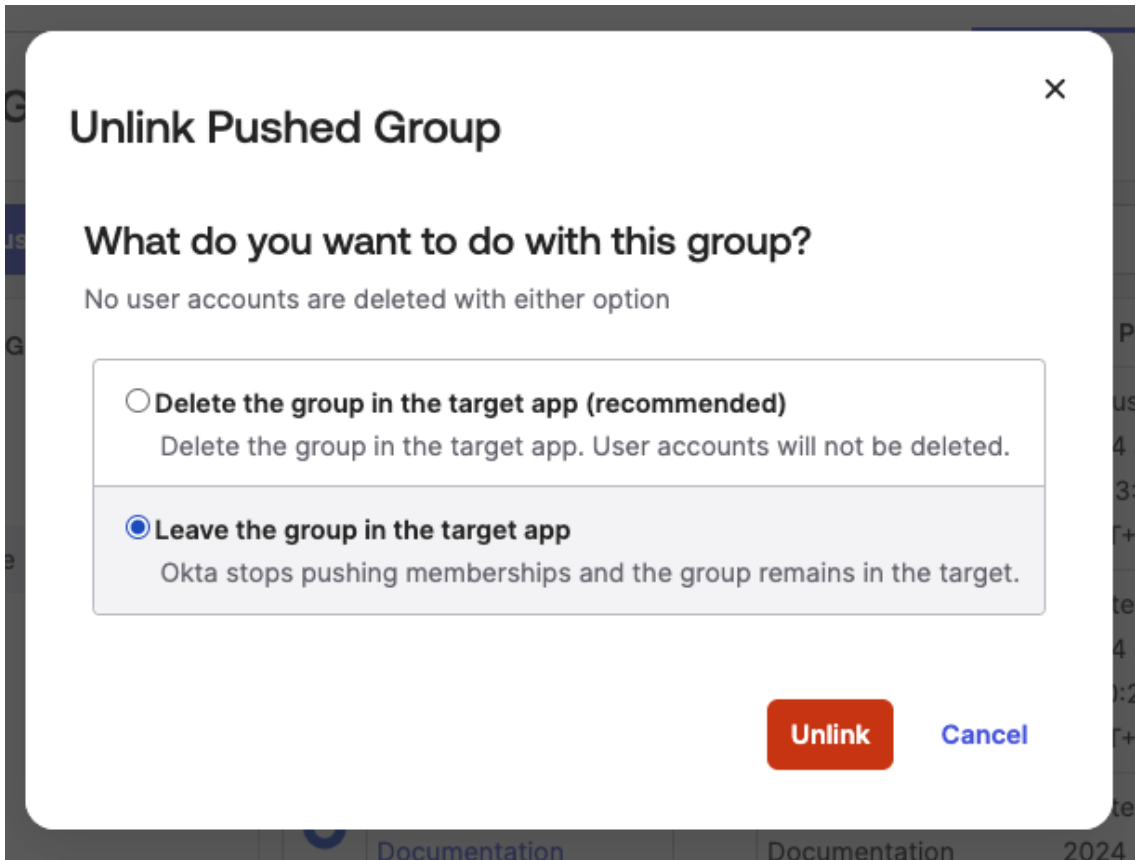
1. On the **Push Groups** page, click the Active status for the group to be unlinked. Click the **Unlink pushed group** option.

a. Screenshot:



2. Select the **Leave the group in the target app** strategy and click Unlink.

a. Screenshot:

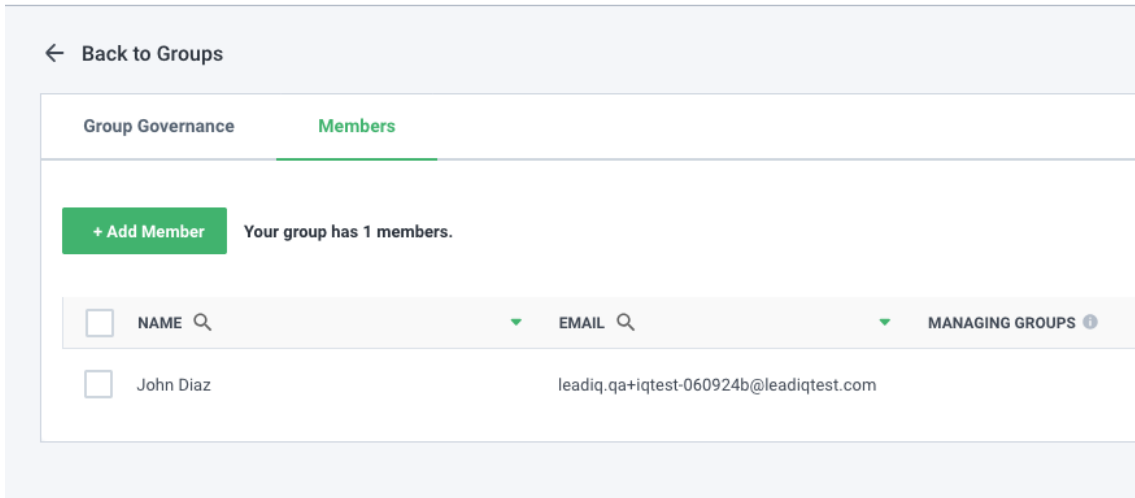


3. Once the pushed group has been unlinked, the LeadIQ group should be retained and the members should be retained on the LeadIQ group.

a. Screenshot:

<input type="checkbox"/>	John Diaz	leadq.qa+igtest-060924b@leadqtest.c...	Internal Documentation - ...			0 / ∞	0 / 200	...
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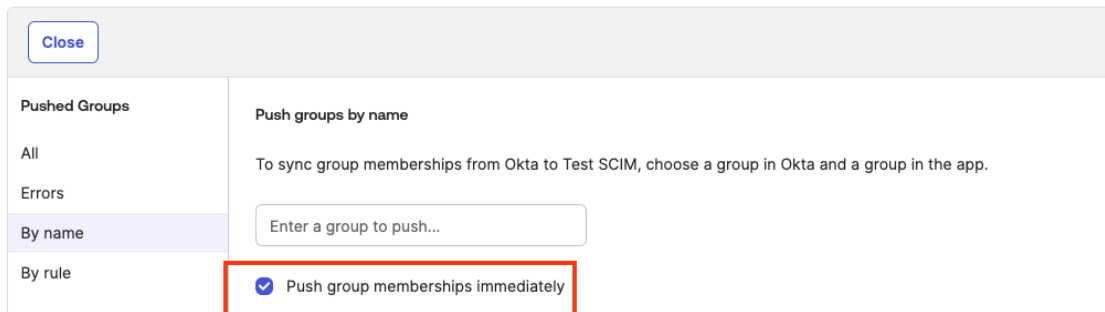
Internal Documentation - Rename (Updated)



Other options:

1. Push group memberships immediately
 - a. When enabled, pushed groups are automatically created on LeadIQ and assignments are automatically done.
 - b. When disabled, pushed groups are not automatically created on LeadIQ and assignments are not done. The pushed groups will be tagged as Inactive and changes on the group will not be implemented on LeadIQ until the group is activated.
 - c. Screenshot:

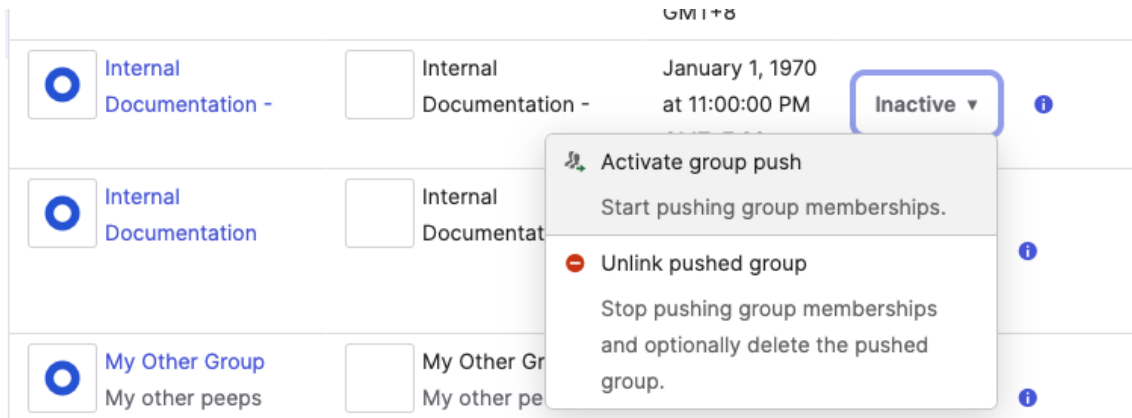
Push Groups to Test SCIM



2. Activate group push

- a. When triggered, the Okta group will be pushed to LeadIQ and group assignments will be implemented. The pushed group's status will be updated to Active if successful.

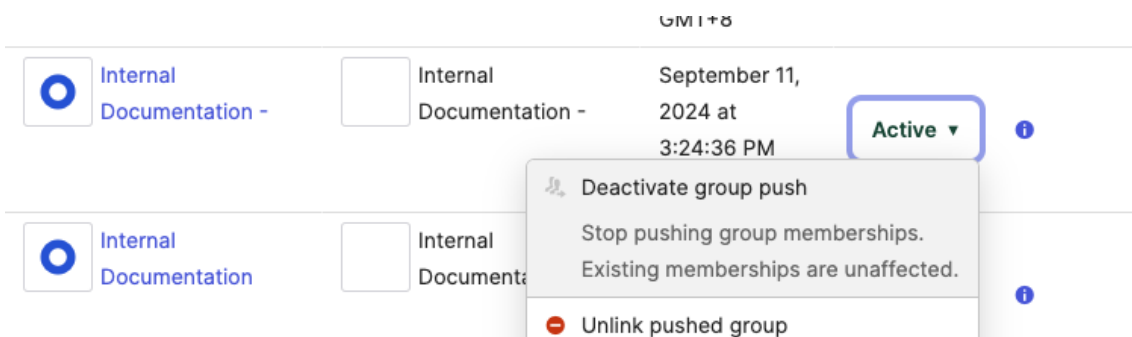
b. Screenshot:



3. Deactivate group push

- a. When triggered, any succeeding changes to the Okta group will not be applied to the linked LeadIQ group. The pushed group's status will be updated to Inactive.

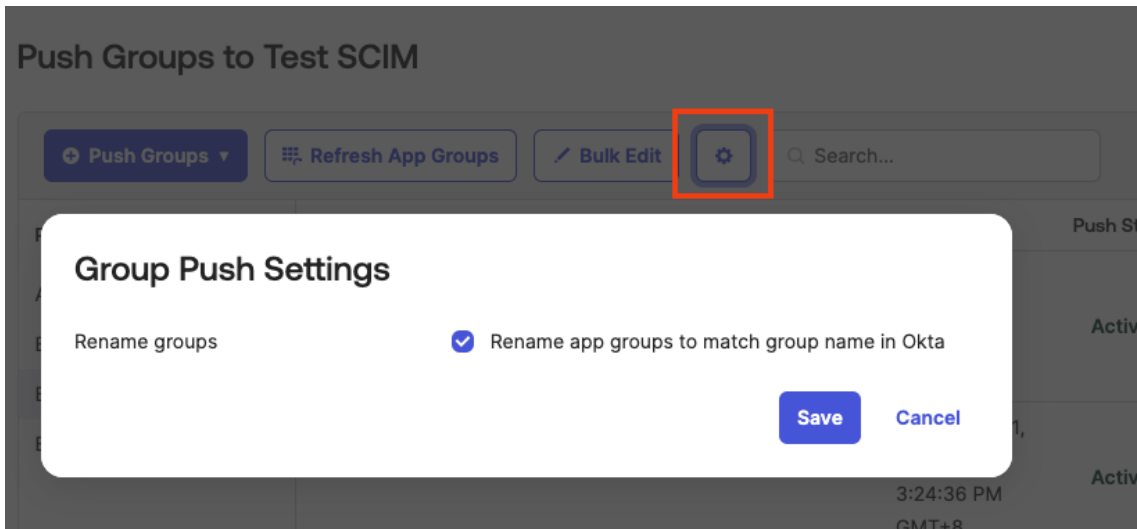
b. Screenshot:



4. Rename app groups to match group name in Okta

- a. When enabled, LeadIQ group names will always be updated to match Okta group names
- b. When disabled, LeadIQ group names will retain the names regardless of Okta group name updates

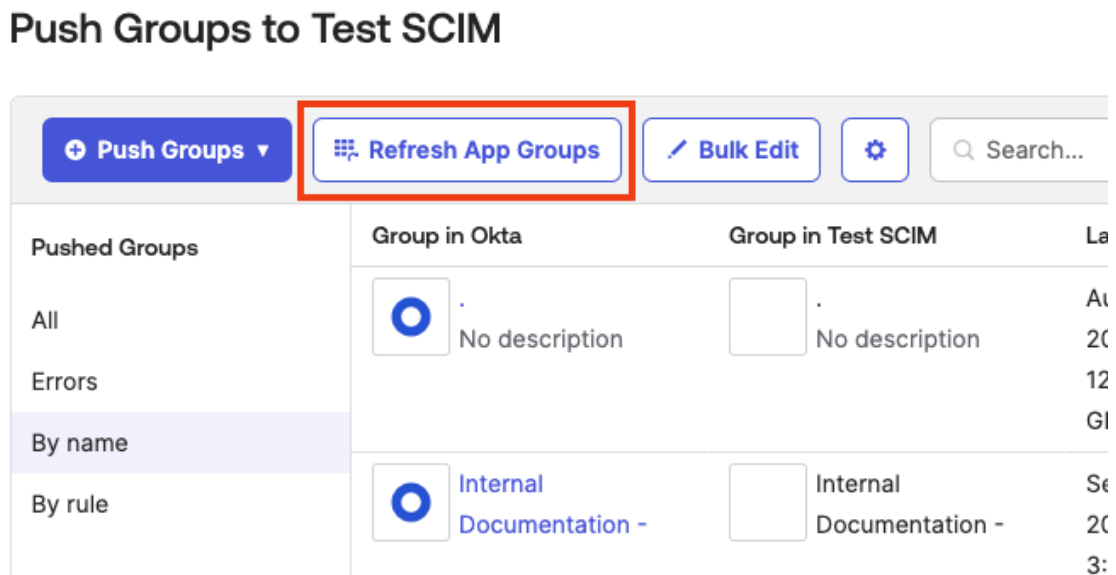
c. Screenshot:



5. Refresh app groups

- a. When triggered, this will fetch all currently available LeadIQ groups. Should always be used when creating and linking Okta groups.

b. Screenshot:




Errors / Limitations:


1. Pushing an unlinked Okta group that has the same name as an existing LeadIQ group will not allow the user to create a duplicate group and the

error message below will be displayed.


a. Screenshot:


GMT+8

 [Deals] Speed Corp.

 [Deals] Speed Corp.

September 11, 2024 at 12:24:54 PM GMT+8

Error 



Failed on 09-11-2024 04:24:54AM UTC: Unable to update Group Push mapping target App group [Deals] Speed Corp.: Error while creating user group [Deals] Speed Corp.: Internal Server Error. Errors reported by remote server: com.leadIQ.provisioning.scim.SyncError\$InvariantViolation: Invariant Error: Duplicate group name

Created by

Kyle Salazar

Created

September 11, 2024 at 12:24:52 PM GMT+8

Push type

By name

2. Import groups functionality is not yet supported. LeadIQ groups cannot be imported to the Okta application yet as of writing.

a. Screenshot:

SCIM Connection


[Edit](#)

SCIM version	2.0
SCIM connector base URL	https://provisioning.leadIQ.com/scim/v2
Unique identifier field for users	userName
Supported provisioning actions	<div><input type="checkbox"/> Import New Users and Profile Updates</div> <div><input checked="" type="checkbox"/> Push New Users</div> <div><input checked="" type="checkbox"/> Push Profile Updates</div> <div><input checked="" type="checkbox"/> Push Groups</div> <div><input type="checkbox"/> Import Groups</div>
Authentication Mode	HTTP Header

HTTP Header	
Authorization	Bearer *****

3. Changing linked groups is not yet supported. This option would appear on an Okta group when a linked LeadIQ group has been deleted while the Okta group is still active.

a. Screenshot:




[Accounting]


Yamanashi Finance

[Accounting]

Yamanashi Finance

August 28, 2024 at 1:25:24 PM GMT+8

Error 



Linked group is missing in Test SCIM. [Change the linked group](#) to resume pushing group memberships.

Created by

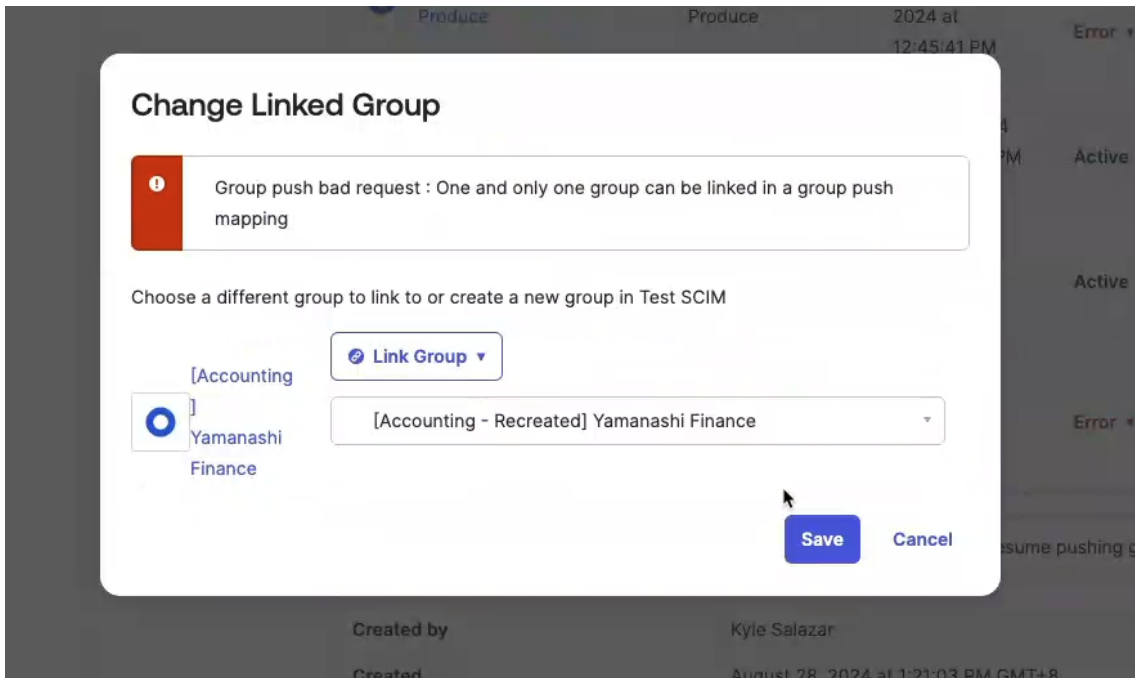
Kyle Salazar

Created

August 28, 2024 at 1:21:03 PM GMT+8

Push type

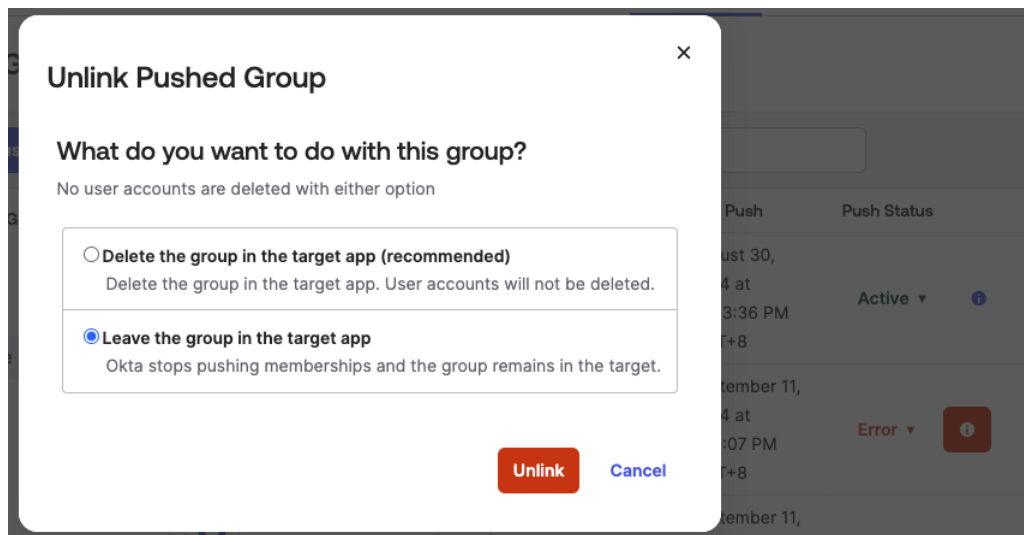
By name



1. Workaround to changing the linked group is as follows:

a. Unlink the Okta group with the **Leave the group in the target app** strategy

i. Screenshot:



b. Refresh the app groups on Okta to fetch all currently available LeadIQ groups

i. Screenshot:

GeneralSign OnMobileProvisioningImportAssignmentsPush Groups

Push Groups to

Get the latest groups from Test SCIM

Push Groups Refresh App Groups Bulk Edit

Search...

Pushed Groups	Group in Okta	Group in Test SCIM	Last Push	F
All	<div><div></div><div>No description</div></div>	<div><div></div><div>No description</div></div>	August 30, 2024 at 12:03:36 PM GMT+8	
Errors				
By name	<div><div></div><div>Internal Documentation -</div></div>	<div><div></div><div>Internal Documentation -</div></div>	September 11, 2024 at 3:19:07 PM	
By rule				

- c. Push the Okta group again and select Link Group as push action, then select the new LeadIQ group to link it with. Once everything is set, click Save. This should then link the Okta group with another LeadIQ group.

i. Screenshot:

Push Groups to Test SCIM

Close

Pushed Groups

All

Errors

By name


By rule

Push groups by name

To sync group memberships from Okta to Test SCIM, choose a group in Okta and a group in the app.

Internal Documentation - Rename (Updated)

☒ Push group memberships immediately

Group	Match result & push action
<div> Internal Documentation - Rename (Updated)</div>	No match found Link Group
	<div>No description</div> <div>[Engineering] Gifu C No description</div> <div>[Support] Mie No description</div> <div>[Prospector] Group A No description</div>

SaveSave & Add Another