

Chorus Integrations Guide

For administrators setting up Chorus integrations

Integrate with Supported CRMs	3
Salesforce Integration	3
Required Permissions	3
Chorus Static IP Addresses	5
Salesforce APIs Used by Chorus	5
HubSpot Integration	37
Microsoft Dynamics Integration	38
Create Tasks for Unrecorded Meetings (Salesforce, HubSpot, and Dynamics)	40
Delete Non-compliant Dialer Calls	41
Account & Opportunity Matching	41
Section 1: Account Matching	42
Section 1A: Alternative Matching Mode: Contact / Lead First	43
Section 2: Opportunity Matching	45
Section 3: Manual Reassociation	46
Section 4: Re-matching	47
Section 5: Backfill Requests	47
Cloud Storage for Recordings (Custom Media Bucket)	48
Set Up Meeting Import (Post Meeting Downloading) with Chorus	49
Microsoft Teams Post-Call Download	49
Other Conferencing Platforms	53
Integrate with Conferencing and Work Productivity Tools	54
General Web Conferencing Integration	55
Native Zoom Integration	56
Zoom Notetaker Integration	58
Clari Integration	59
Gainsight Integration	59
Zapier Integration	61
Slack Integration	63
Dialer Integration	66
Configure SSO for Chorus	75

Requirements	75
Configure Okta for Chorus	75
Configure Microsoft Entra ID for Chorus	83
Configure Jumpcloud for Chorus	91

This guide is a companion to the [Chorus Implementation Guide](#) that describes the overall implementation of Chorus for your organization. Use this guide to integrate with supported CRMs, web conferencing applications, and dialers.

Integrate with Supported CRMs

Chorus integrates directly with the following cloud-based CRM applications commonly used in many organizations:

- Salesforce
- HubSpot
- Microsoft Dynamics

Important: Chorus does not integrate with any on-prem version of these CRMs applications.

Salesforce Integration

This section describes how to integrate with Salesforce.

Before You Begin

You must have either Enterprise, Unlimited, or Developer's Edition of Salesforce and you must have Salesforce Admin rights to install and configure Chorus.

Required Salesforce Permissions

Before connecting Chorus to Salesforce, ensure the integration user or Chorus admin account has the following permissions configured in Salesforce. Missing permissions are among the most common causes of sync failures, incomplete data flow, and integration disconnections after initial setup.

Note: While Salesforce Admin rights are required to *install* the Chorus Managed Package, the Salesforce Connect sync itself does not require full admin rights — only the specific permissions listed below.

Required Permissions

Permission	Description	Required
API Enabled	Grants access to any Salesforce.com API. Core requirement for all Chorus–Salesforce communication.	Always



Permission	Description	Required
View Setup and Configuration	Allows viewing of App Setup and Administrative Settings pages.	Advanced features only
Edit Task	Allows Chorus to create, edit, and delete Call Tasks in Salesforce after meetings are recorded.	Always
View All Users	Allows Chorus to view all users in Salesforce, regardless of sharing settings, for participant matching.	Always
View Roles and Role Hierarchy	Allows Chorus to read your Salesforce role hierarchy, used for manager reporting and team-level analytics.	Always

In addition to the above profile permissions, the integration user must have **Create, Read, and Edit** field-level permissions on the following standard objects:

- Contact
- Account
- Opportunity
- Lead

Tip: We recommend setting up a dedicated integration user in Salesforce rather than connecting via a named user account. This ensures the sync remains active if team members leave or change roles.

Important: The Salesforce API Only Integration user license is not supported for the Chorus integration. This license type restricts browser-based login, which is required to complete the Chorus authorization setup.

The dedicated integration user must have:

- A standard Salesforce license (not API Only)
- API Enabled permission
- System Administrator profile or equivalent

Using any other license type that restricts browser-based login will cause the integration setup to fail.

Chorus Static IP Addresses

Chorus makes Salesforce API calls from a fixed set of static IP addresses. If your Salesforce org enforces IP-based access restrictions, add the following IP addresses to the **Trusted IP Ranges** for the integration user's profile and to the **IP Relaxation** settings on the **AffectLayer oAuth** Connected App.

Chorus Static Egress IPs:

IP Address	Region
54.219.82.127	us-west-1
52.52.118.214	us-west-1
13.57.103.56	us-west-1
52.9.63.229	us-west-1
184.72.16.233	us-west-1

Note for engineering reviewers: Please confirm the complete and final list of static egress IPs once [CHOR-70500] is shipped, along with the correct region labels, before this section is published.

To add Chorus IPs to your Salesforce Trusted IP Ranges:

1. In Salesforce, go to **Setup > Security > Network Access**
2. Click **New**
3. Enter the Chorus IP address in both the **Start IP Address** and **End IP Address** fields
4. Add a description (e.g., **Chorus Integration - Egress IP**)
5. Click **Save**
6. Repeat for each IP address in the table above

Salesforce APIs Used by Chorus

Chorus communicates with your Salesforce instance via the following standard REST APIs. Your network and security settings should permit outbound calls to these endpoints:

API	Endpoint	Purpose
Limits	/services/data/v###.0/limits/	Checks your org's API usage limits



API	Endpoint	Purpose
sObject — List	/services/data/v##.0/objects/	Retrieves and creates or updates CRM objects (Tasks, Contacts, etc.)
sObject — Describe	/services/data/v##.0/objects/<object_type>/describe	Reads object metadata and field definitions
sObject — Updated	/services/data/v##.0/objects/<object_type>/updated	Detects recently updated records for sync
sObject — Deleted	/services/data/v##.0/objects/<object_type>/deleted	Detects deleted records to keep Chorus data in sync
Query	/services/data/v##.0/query	Executes SOQL queries for matching Accounts, Opportunities, and Leads
Search	/services/data/v##.0/search	Executes SOSL searches for participant and account matching

Note: Replace `v##.0` with the current Salesforce API version supported by your org. Chorus supports API v35.0 and above. For the most current supported version, contact chorussupport@zoominfo.com.

Note for engineering reviewers: Please confirm the current minimum supported Salesforce API version before this is published.

Required Fields for Integration

The following Salesforce object fields are read and written by the Chorus integration. Ensure the integration user has visibility to these fields.

Task

`Id · OwnerId · ActivityDate · Type · CallDurationInSeconds Whold · CreatedDate · CallDisposition · WhatId LastModifiedDate · CallType · Status · CreatedBy · IsClosed Subject · AccountId · Description · ContactId`

Include any picklist fields used to segment data (e.g. territory, industry, region, type, size).

Account

`Id · LastModifiedDate · Phone · Type · CreatedBy Name · CreatedDate · OwnerId`



Opportunity

Id · Name · AccountId · Type · OwnerId · IsClosed · CreatedDate · StageName · IsDeleted · LastModifiedDate · CloseDate · IsWon · CreatedBy · Probability · Amount · SystemModstamp

User

Id · CreatedBy · Title · UserType · FirstName · ManagerId · CreatedDate · LastName · Email · LastModifiedDate · Name

Contact

Id · FirstName · Email · CreatedDate · LastName · Title · LastModifiedDate · AccountId · CreatedBy · OwnerId

Lead

Id · Company · OwnerId · CreatedDate · IsConverted · FirstName · LastModifiedDate · ConvertedAccountId · LastName · CreatedBy · ConvertedContactId · Title · Status · ConvertedOpportunityId

Opportunity History

OpportunityId · SystemModstamp · StageName

Opportunity Field History

OpportunityId · Field · NewValue · CreatedById · OldValue · IsDeleted

For a full list of supported custom field types for the Chorus Tracker sync, see **Custom Fields Supported** in the Appendix.

Perform Initial Connect and Sync

By syncing Chorus and Salesforce, Chorus will automatically sync any of your team's conversations with the appropriate Account and/or Opportunity in Salesforce. This will also allow you to sort calls in Chorus by any relevant Account or Opportunity data, including:

- Account Name
- Opportunity Name
- Opportunity Stage
- Opportunity Size
- Close Date

Syncing will also automatically push a completed Salesforce task containing a link to a call as well as a list of attendees, topics discussed, and next steps. To connect and sync:



1. Log in to Chorus as an admin.

Note: We recommend having a member of your Ops team or a dedicated integration user connect your Chorus instance with Salesforce.

2. Go to **Chorus Settings > Integrations**.
3. Click **Enable** next to **SalesforceConnect**.

CRM Connect

Enabling CRM Connect provides the following benefits:

- Any member of your CRM org can sign-in to Chorus using CRM authentication.
- You can filter and analyze your Chorus recordings with CRM data.
- Chorus can automatically create Tasks for reps' calls and meetings, with their call notes saved to the 'Task Comments'. Several configuration options are available.
- You can require reps to fill out specified CRM picklists (e.g. "Opportunity Stage", "Call Outcome") after their online meetings and calls.

 Salesforce Connect	Enable
 Hubspot Connect	Enable
 Microsoft Dynamics Connect	Enable

Note: Being a CRM Admin is not required to connect your team's CRM to Chorus. For additional information on CRM integration (including VisualForce and CTI) click [here](#).

4. Log in to Salesforce using your credentials.
5. Once you're connected, you can use the **CRM Objects Creation** section to configure how Chorus automatically creates objects in your CRM for different engagement types.

CRM Connect


SalesforceConnect

Enabled

Salesforce Package

Install the Chorus.ai Salesforce package to give your organization access to recordings directly from Salesforce! For help use our [setup guide](#)

Install Salesforce Package

CRM Objects Creation

Chorus can automatically create objects in CRM for different engagement types. You can choose below the required engagement type(s) for each setting to control which objects you would like to push into CRM. It is possible to create a Task, an Event, or both.

Create an event ?	☒ Recording	☐ Email	☒ Unrecorded Meeting
Create a task	☒ Recording	☐ Email	☒ Unrecorded Meeting
Create tracker / metadata	☒ Recording	☐ Email	
Create a custom object	☒ Recording	☒ Email	
Create contact if not exist	☐ Recording	☐ Email	
Create account if not exist	☐ Recording	☐ Email	
Push transcript	☐ Recording		

Import Salesforce Fields to Filter Calls in Chorus

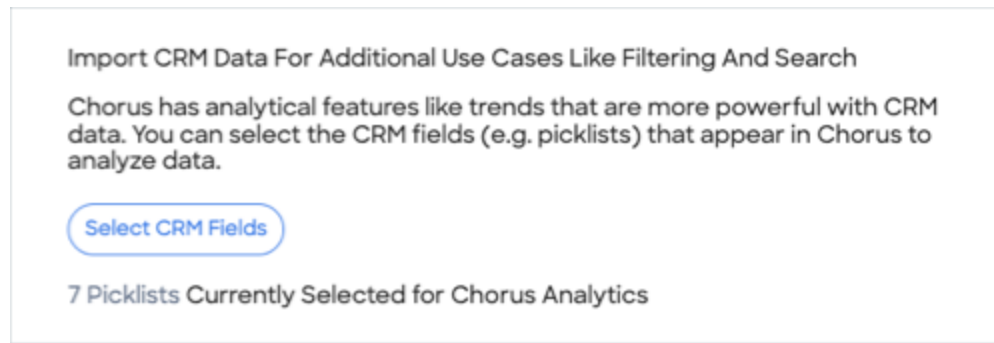
Once you've synced Salesforce with Chorus, you can map to custom fields you have on standard objects in Salesforce (Task, Lead, Account, Opportunity), allowing you to filter calls by Opportunities or Accounts.

Note: Chorus supports the following Salesforce fields:

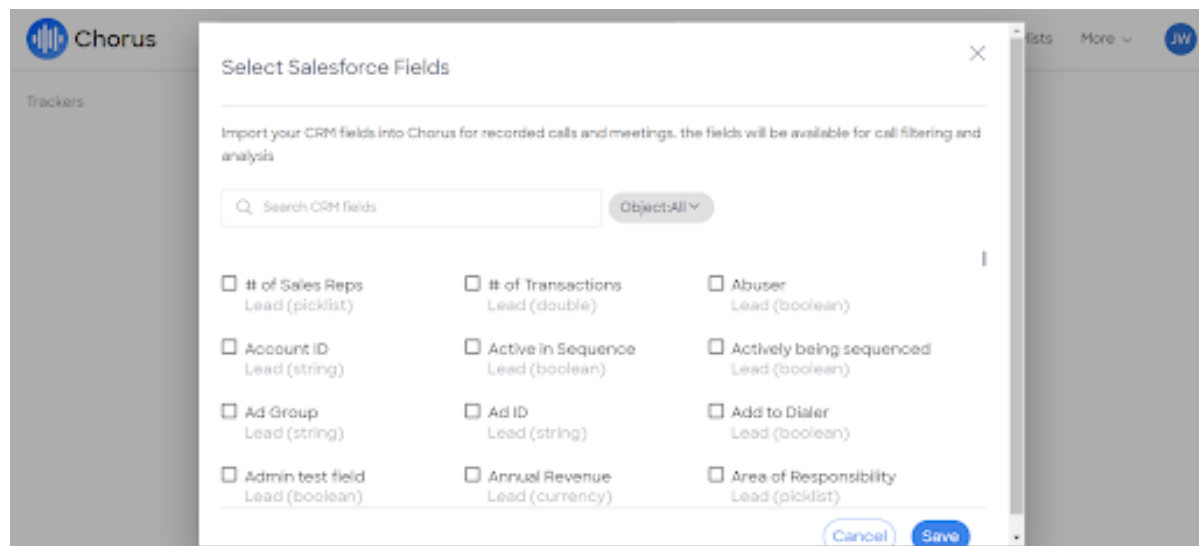
- Currency
- Double
- Formula
- Percent
- Picklist
- Multipicklist
- Boolean
- Number
- Date
- String



1. In Chorus, go to **Settings > Integration Settings** and scroll to the **Import CRM Data for Additional Use Cases Like Filtering and Search** section.
2. Click **Select CRM Fields**.

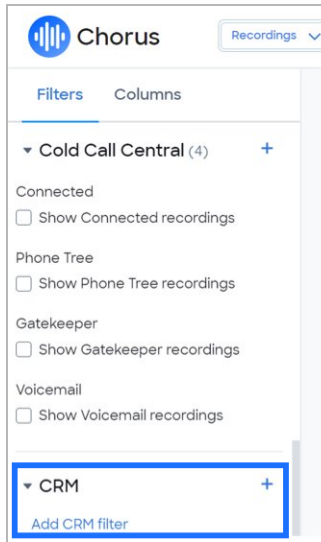


3. Select the Salesforce fields you want to import to add as filters for calls, deals and analytics.



4. Click **Save**.

On the Recordings, Deals, or Analytics pages, your users will see the new filters under **Custom CRM Filters**. This will enable your users to filter calls by the fields you've enabled.



Push Call Activity to Salesforce (Automatic Task or Event Creation)

Once Salesforce is synced with Chorus, Chorus will automatically log your team's activity from their scheduled screen share meetings in Salesforce. The sync includes information about call participants, meeting subject, meeting date, next steps and other tracked topics found in the transcript.

Here's an example of a pushed task in Salesforce:

Comments

RECORDING:
<https://chorus.ai/meeting/3810048?call=CD2590C3E9CE4885ADE9C6D213C44870123>

ATTENDEES:
 Michael Scott, Regional Manager
 Dwight Schrute, Assistant to the Regional Manager
 Todd Packer, Field Sales
 Fake Acme Employee, Account Executive

KEY TOPICS DISCUSSED:
 Impact, Competitor 1, Pain, Budget, Need, Metrics, Background, Use Case, Timing, Authority

NEXT STEPS (TRANSCRIPT):
 * Sure, I'll send you the invite for Friday at 3pm. Anything else I could answer for you?
 * There's a bunch of other security documentation as well, I'll shoot them over after the call
 * Great question, let me ask my solutions engineer and i'll get back to you

About Pushed Tasks

The default task type for Chorus tasks is **Call**. However, this can be modified using Process Builder in Salesforce.

The Pushed Tasks feature is on by default, but can be turned off if necessary by a Chorus admin using the following steps:

1. Click on **your initials** in the bottom left corner of the navigation bar.

2. Select **Settings**, then navigate to the **Integrations** page.

Create Task or Event for CRM Object Creation in Salesforce

Admins using Salesforce, can choose either Task, or Event when writing from Chorus.

1. In Chorus click **Settings > Integrations**.
2. Scroll to **CRM Objects Creation**.
3. Select **Create an event**, or **Create a task**.

CRM Objects Creation
Chorus can automatically create objects in CRM for different engagement types. You can choose below the required engagement type(s) for each setting to control which objects you would like to push into CRM. It is possible to create a Task, an Event, or both.

Create an event ?	☒ Recording	☐ Email	☒ Unrecorded Meeting
Create a task	☒ Recording	☐ Email	☒ Unrecorded Meeting
Create tracker / metadata	☒ Recording	☐ Email	
Create a custom object	☒ Recording	☒ Email	
Create contact if not exist	☐ Recording	☐ Email	
Create account if not exist	☐ Recording	☐ Email	
Push transcript	☐ Recording		

Note: Events created this way will appear in your Salesforce calendar.

Pushed Tasks Naming Convention

All tasks pushed into Salesforce from Chorus have a naming convention that begins with "Chorus -" and ends with the name of the scheduled meeting (e.g., *Chorus - Wonka and Schrute Farms Connect*).

If a meeting is unscheduled and doesn't have a title, it will be entitled, *Chorus - Unscheduled Meeting*.

Push Transcript for CRM Objects Creation in Salesforce

The **Push Transcript** setting controls whether Chorus writes the full call transcript into your Salesforce instance after a recorded meeting.

Where the Transcript Lands

When enabled, the transcript is written into a **Chorus Engagement Object**, a custom Salesforce object installed as part of the Chorus Salesforce Managed Package. The transcript does **not** appear in the body of a standard Salesforce Task or Event.

Dependencies

Requirement	Details
Create custom object must be enabled	Push Transcript depends on the Engagement Object being created. Ensure "Create a custom



Requirement	Details
	object" is enabled for Recordings in the CRM Objects Creation settings.
Recordings only	Push Transcript applies exclusively to call recordings. It is not available for email engagements or unrecorded meetings.
Task/Event creation not required	Push Transcript does not require "Create a task" or "Create an event" to be enabled. It only requires "Create a custom object."
Salesforce only	Push Transcript is only available for Salesforce integrations. It is not available for HubSpot or Microsoft Dynamics.

For full details on the Engagement Object — including the data it captures and the reports it enables — see **Chorus Salesforce Integration: Data & Reporting** below.

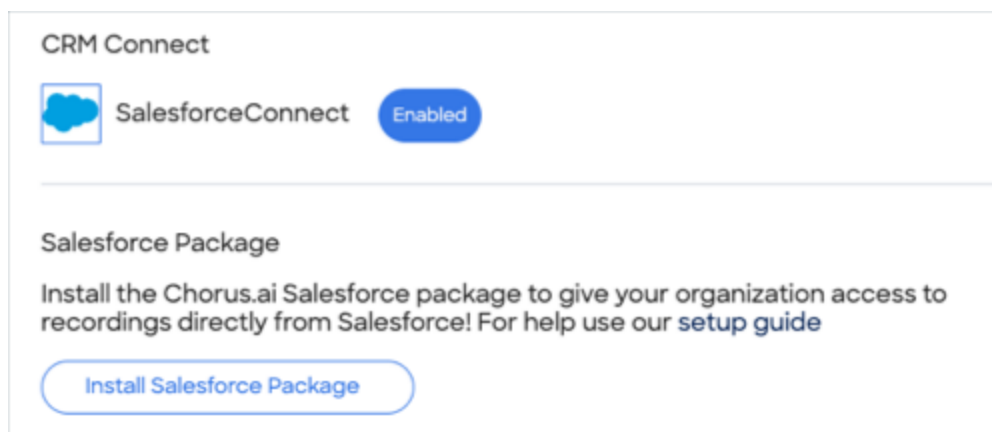
Install the Chorus for Salesforce Managed Package

Once Salesforce has been synced, you can install the managed package Chorus to make Chorus data accessible to your team from within the Salesforce platform, enabling Chorus to provide relevant data in your existing Salesforce instance and Salesforce dashboards. This includes:

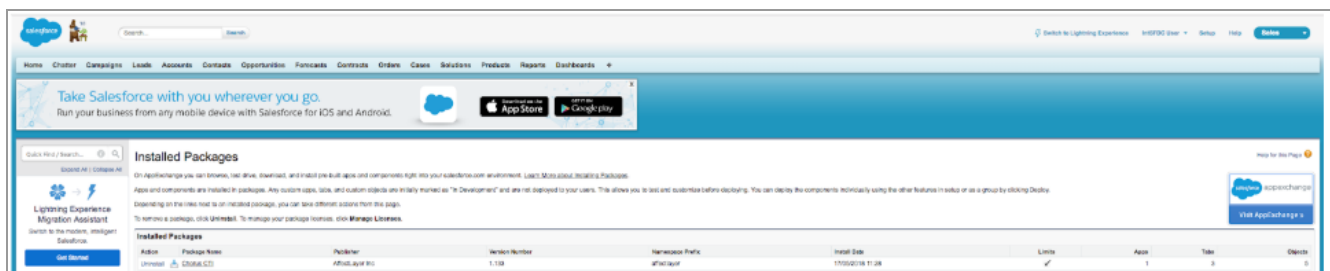
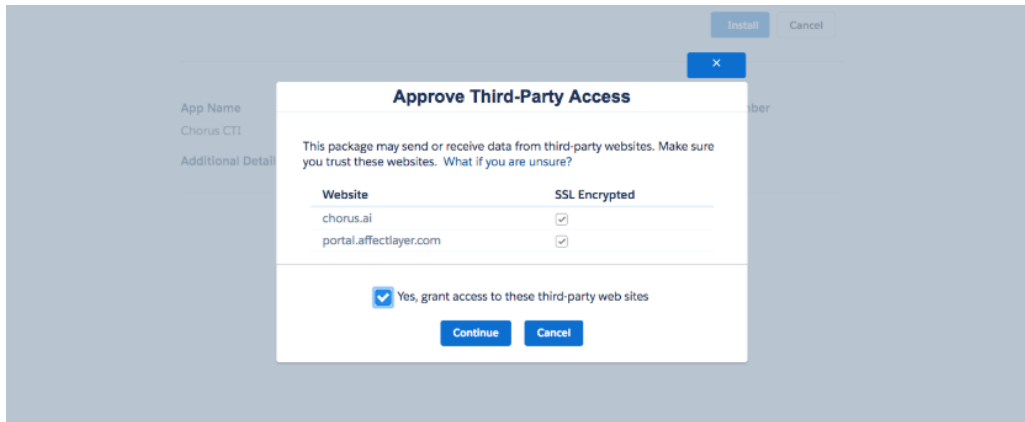
- Access to call recordings processed through Chorus within the Salesforce platform where users can review call information in context with CRM data.
- The ability to sync Chorus Trackers to Salesforce to support custom reporting.

To install the Chorus Salesforce package:

1. Log in to Chorus and navigate to **Settings > Integration Settings**.
2. Click **Install Salesforce Package**.



3. Click **Install for All Users** and click **Install**.
4. Select **Yes, grant access to these third-party websites** and click **Continue**.
5. Click **Done** to complete the process.



Note: After installation, the package will appear in your Salesforce Installed Packages list with the publisher name **AffectLayer Inc.** This is expected — AffectLayer was the former name of Chorus prior to acquisition by ZoomInfo. The package is fully supported and maintained by ZoomInfo.

Configure permissions before setting up Chorus iFrame/Lighting Component

Note: The Chorus iFrame is only supported for the following pages:

- Leads
- Accounts
- Opportunities

The iFrame cannot be configured on the Contacts page.

1. In Salesforce go to **Setup > Apps > Connected Apps > Manage Connected Apps > Chorus.ai** and click **Edit**.



2. **Set Permitted Users** to **Admin approved users are pre-authorized**.

Connected App
Chorus.ai

Help for this Page

Connected App Edit

Version 227
Description

Basic Information | = Required Information

Start URL i Mobile Start URL i

OAuth Policies

Permitted Users Admin approved users are pre-authorized ▼

Enable Single Logout ☐ i

IP Relaxation | Enforce IP restrictions ▼

Refresh Token Policy:

- ☒ Refresh token is valid until revoked
- ☐ Immediately expire refresh token
- ☐ Expire refresh token if not used for Day(s) ▼
- ☐ Expire refresh token after Day(s) ▼

3. Navigate back to **Setup > Apps > Connected Apps > Manage Connected Apps**. Click on **"Chorus.ai"** (Do not click on Edit.)
4. Click on **Manage profiles** and select which profiles should have access to view the package. We recommend anyone that would find value in listening to a conversation. (Sales, Success Product, Marketing, Executives, etc.)


SETUP

User Provisioning Settings

☐ Enable User Provisioning
 [i](#)

Trusted IP Range for OAuth Web Server Flow

No application-defined IP ranges

Profiles

Manage Profiles

Profile	Profile Description
System Administrator	

Permission Sets

Manage Permission Sets

No permission sets associated with this app.


SETUP

Application Profile Assignment

[« Back to Connected App Detail](#)

Select the appropriate profiles to choose which users have access to this application.

Select	Profiles
☒	Analytics Cloud Integration User
☒	Analytics Cloud Security User
☐	Chatter External User
☐	Chatter Free User
☐	Chatter Moderator User
☐	Chatter Only User
☒	Company Communities User
☒	Contract Manager
☐	Customer Community Login User

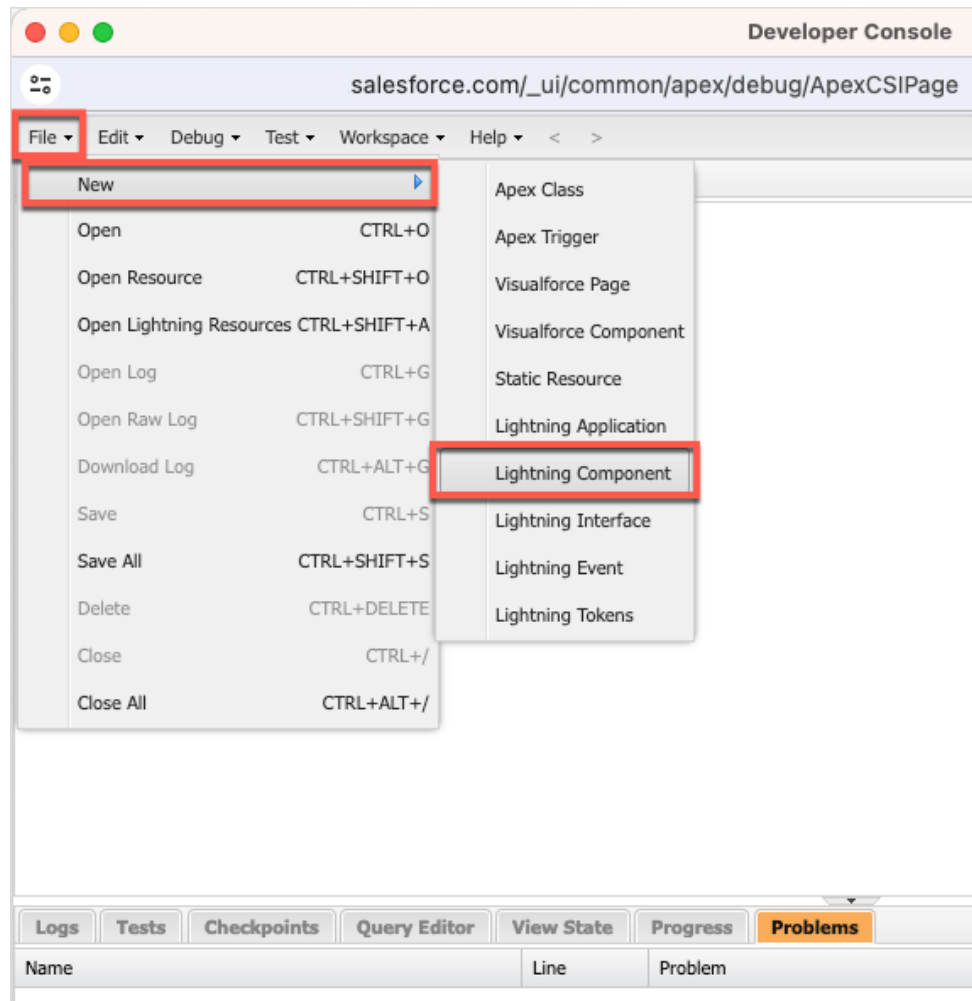
5. Click **Save**.

Create a New Lightning Component

1. In Salesforce, open a new Developer Console by clicking the **gear icon > Developer Console**.



2. Click **File > New > Lightning Component**.



3. Name the component - we recommend naming the component **"Chorus."**

New Lightning Bundle

Name:

Description:

Component Configuration

Create bundle with any of the following configurations (optional)

- ☐ Lightning Tab
- ☐ Lightning Page
- ☐ Lightning Record Page
- ☐ Experience Builder Site Page
- ☐ Lightning Quick Action

Submit

4. Select **Lightning Tab** under Component Configuration and click **Submit**.

New Lightning Bundle

Name:

Description:

Component Configuration

Create bundle with any of the following configurations (optional)

- ☒ Lightning Tab
- ☐ Lightning Page
- ☐ Lightning Record Page
- ☐ Experience Builder Site Page
- ☐ Lightning Quick Action

Submit

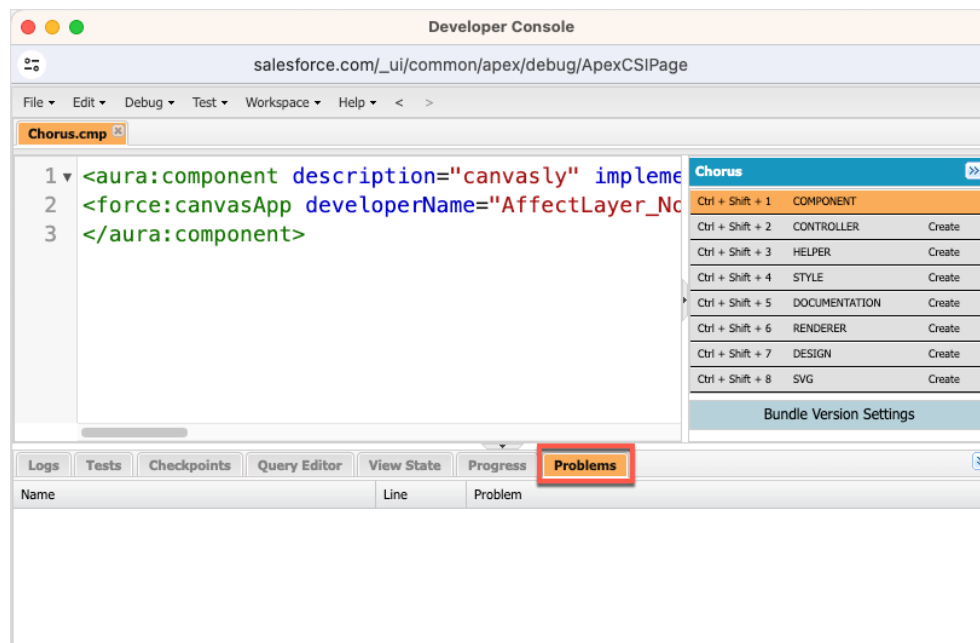
5. Two tabs will open in the Developer Console:
 - a. Chorus - a read.me file which you can ignore.

b. Chorus.cmp - your lightning component.

6. In the Chorus.cmp file, delete any existing text and paste the following code:

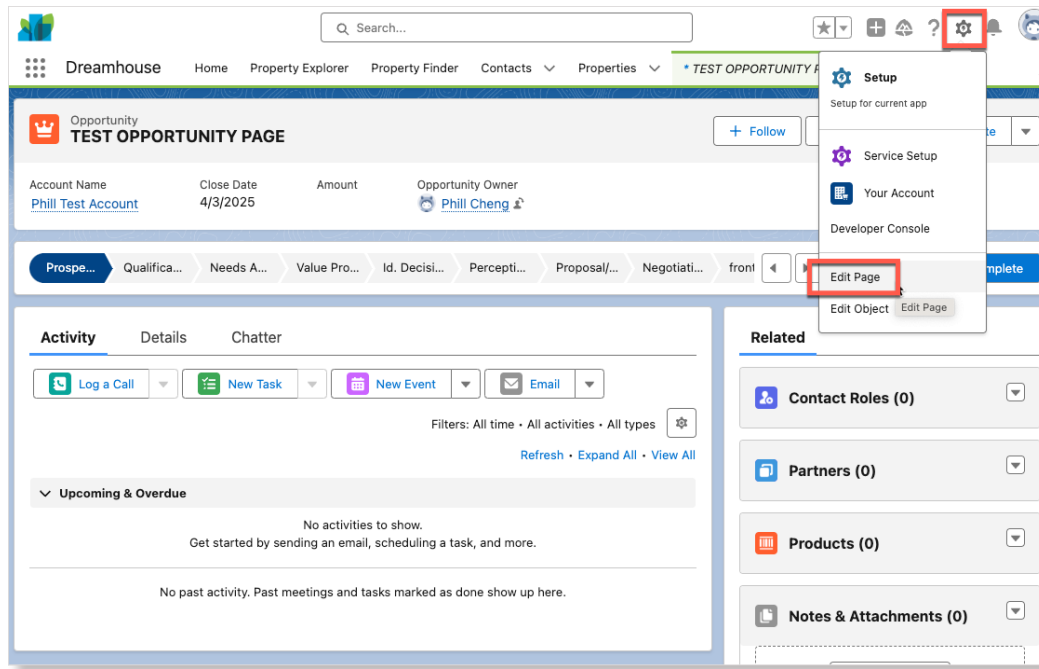
```
<aura:component description="canvasly"
implements="force:lightningQuickAction,force:appHostable,flexipage:availableForAllPageTypes,flexipage:availableForRecordHome,force:hasRecordId,forceCommunity:availableForAllPageTypes" access="global">
<force:canvasApp developerName="AffectLayer_Notes" namespacePrefix="affectlayer"
width="99%" scrolling="false" />
</aura:component>
```

7. **Save** the lightning component and confirm there are no errors by checking the **Problems** tab in the lower window.

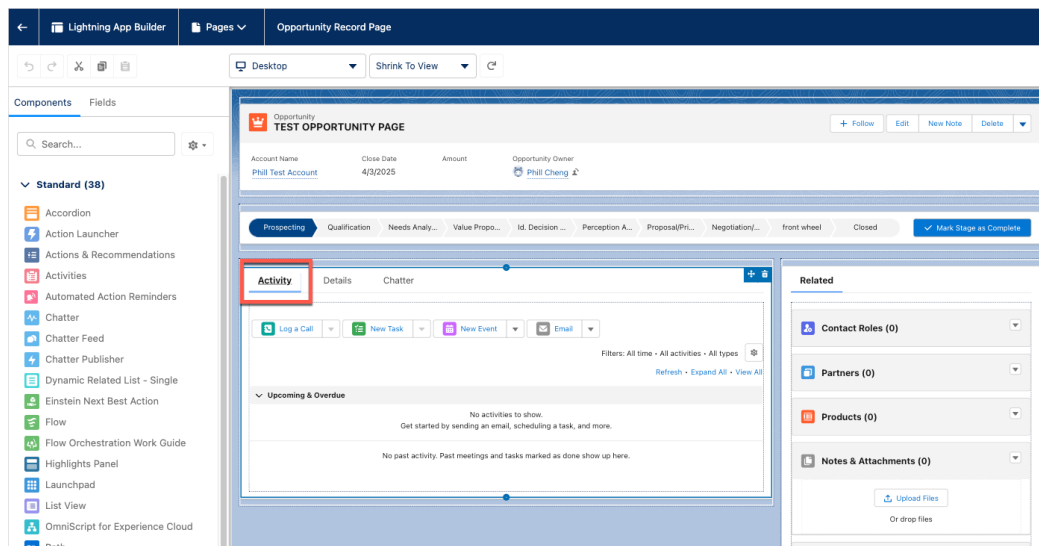


Add a Chorus App Tab

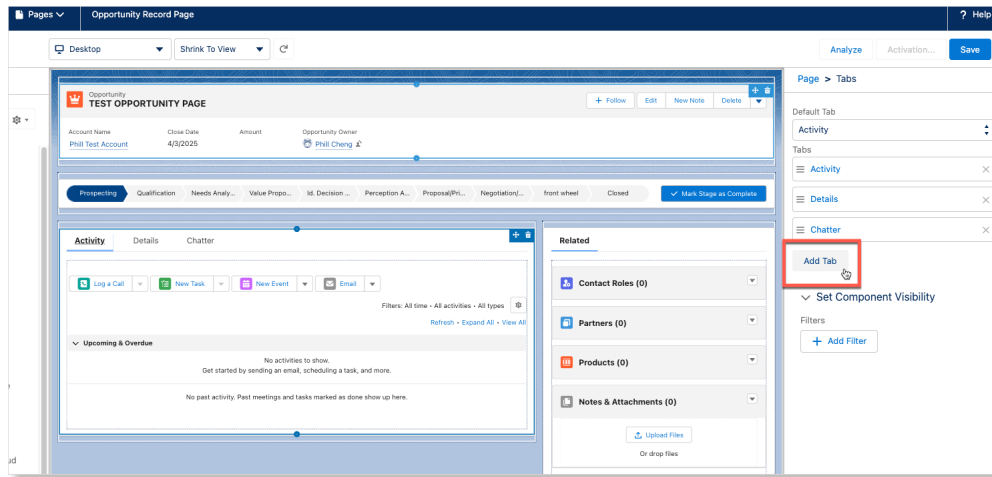
1. In Salesforce navigate to the page where you want to add the Chorus lightning tab. (Example: The Opportunity page or Account page.)
2. Click the **gear icon > Edit Page**.



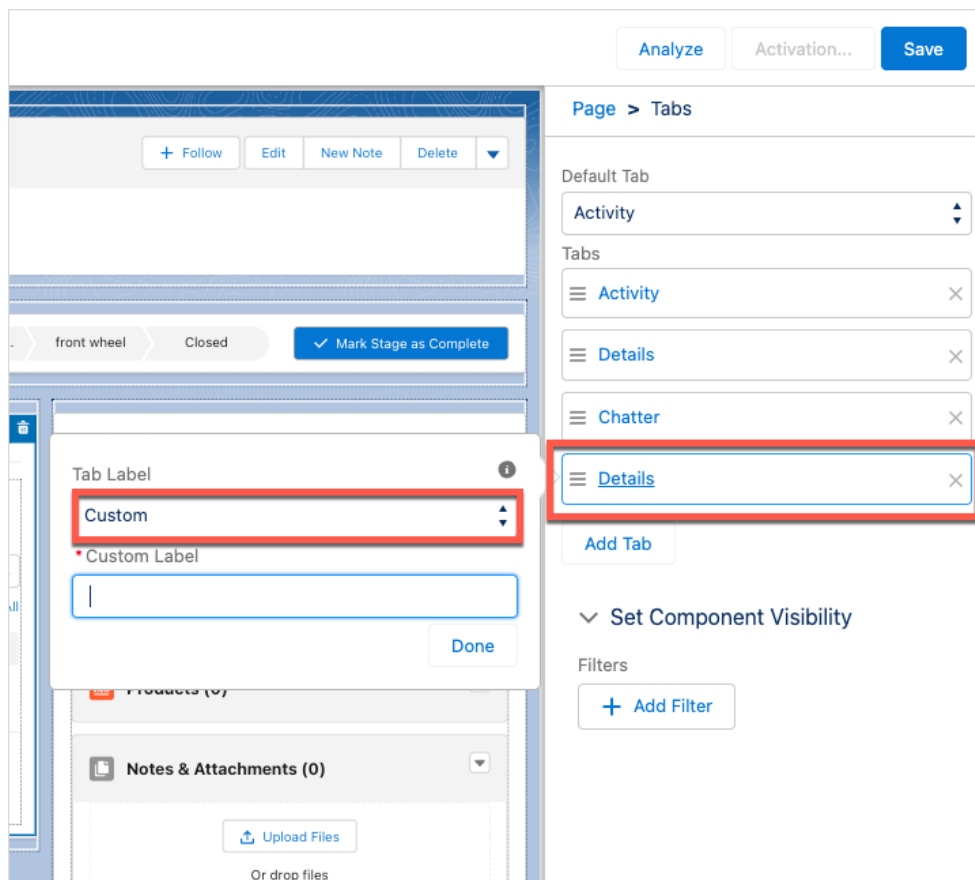
- From the page preview, click on any tab (Activity, Details, etc) from the middle of the page to open the **Tab Manager** in the right pane.



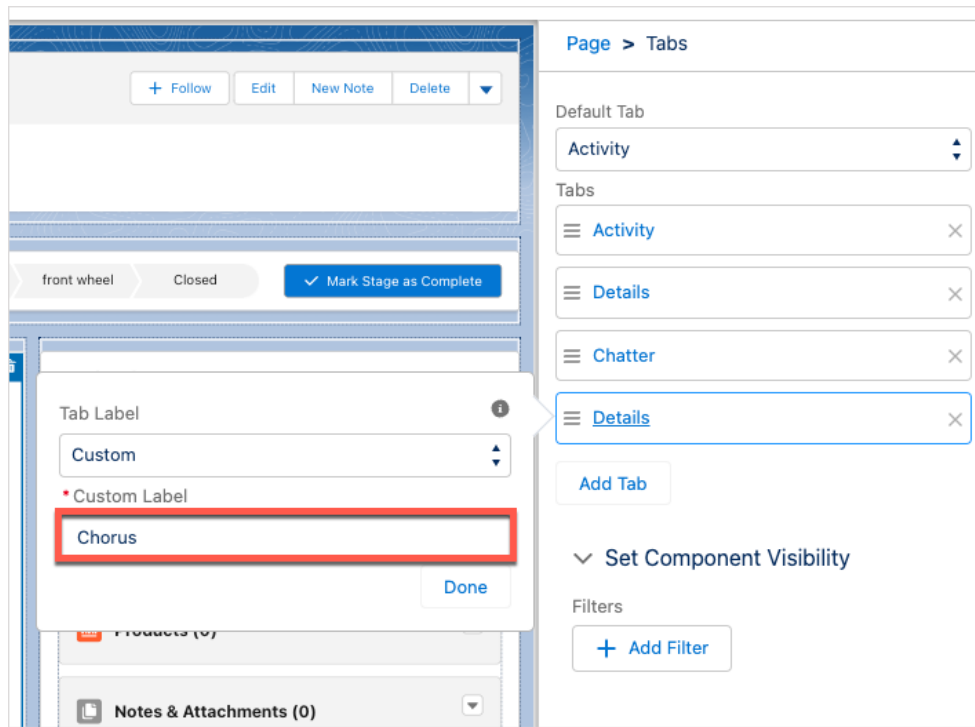
- Click **Add Tab**.



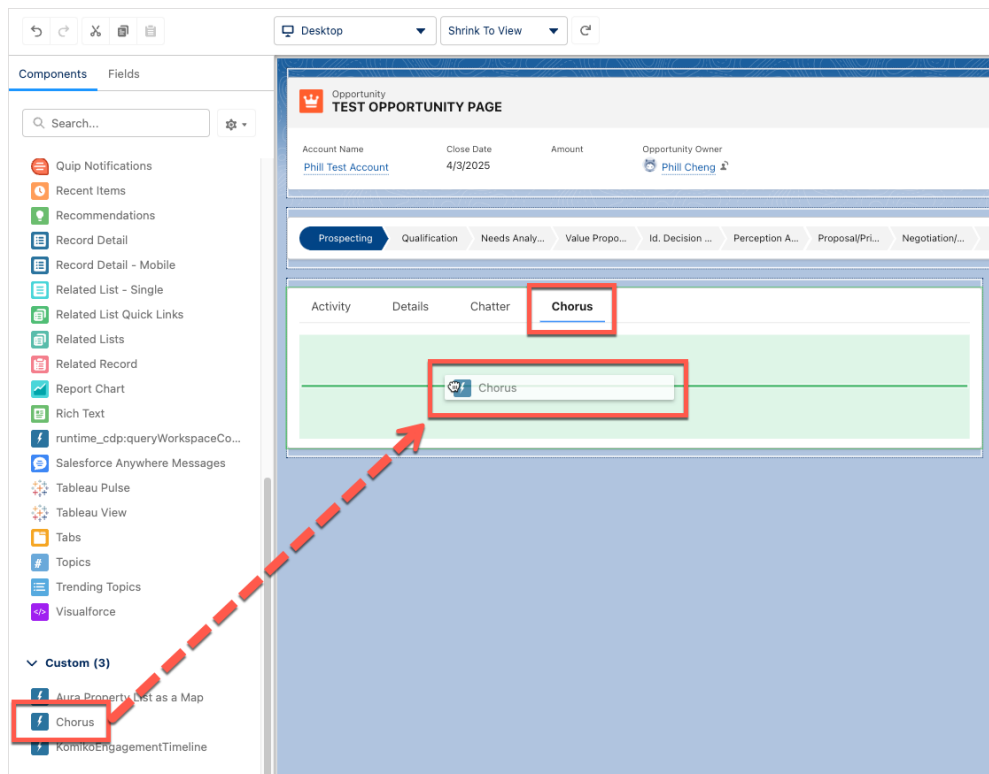
- Click on the new tab and change to **Custom**.



- Name it "**Chorus**" and navigate to that tab in the page preview panel.



- On the page preview panel, search for your new Chorus component in the left pane and drag it into the page layout.



- Click **Save and Activate**.

Navigate back to a record to confirm the Lightning component / new tab works as expected.

Chorus Salesforce Integration: Data & Reporting

This section covers the specific data structures and reporting capabilities enabled by the Chorus Salesforce Managed Package.

The Engagement Object ([affectlayer__Engagement__c](#))

The **Engagement Object** acts as the parent record for each interaction. It captures the high-level metadata of a recorded meeting or call.

Key Data Points Captured:

- **Recording Metadata:** Name of recording, Date, Duration, and Language.
- **Contextual Data:** Stage (at time of call) and Disposition (e.g., Call Outcome).
- **Direct Links:** A secure link to the Chorus recording.
- **CRM Mappings:** Direct lookups to associated Accounts, Leads, and Opportunities.
- **Participants:** List of internal users and external contacts involved.
- **Transcription:** The full call transcript (stored as a Long Text Area).

Note: Because the [Transcript](#) field is a Salesforce Long Text Area, it is subject to character limits in standard reporting. For full analysis, users should use the **Link to Chorus recording** to view the interactive transcript in the Chorus platform.

The Moment Object ([affectlayer__Moment__c](#))

The **Moment Object** is a child record to the Engagement. It stores data about specific, time-stamped events detected within a recording — such as competitor mentions, pricing discussions, or custom tracked topics.

Key Capabilities:

- **Granular Reporting:** Enables "Engagements with Moments" custom report types.
- **Workflow Automation:** Moment records can serve as triggers for Salesforce Flows configured by your Salesforce Admin (e.g., alerting a manager when a "Risk" Tracker is identified).

Key Data Points Captured:

- **Moment Category:** Type of event (e.g., Competitor, Pricing, Next Steps).
- **Timestamp:** The exact time offset within the recording.
- **Transcript Snippet:** The specific text block that triggered the moment.
- **Speaker Identification:** Identifies if the rep or the prospect spoke the moment.
- **Tracker ID:** The specific Chorus Tracker that generated the record.

Important Configuration Note: Moment records are controlled by the "**Create tracker / metadata**" setting in CRM Objects Creation — not by the "Push Transcript" setting. For



Moments to sync, Trackers must first be configured and active within your Chorus instance.

Out-of-the-Box Reports

Once the Managed Package is installed, pre-built reports are available in **Reports > Folders > ChorusReports**. These can be used as-is or as templates for custom dashboards.

Report Name	Business Value / Insight
Closing opps with/without leaders	Executive Presence: Identifies if leadership is involved in late-stage deals.
Competitive mentions over time	Market Intelligence: Visualizes which competitors are appearing most in the funnel.
Early stage pricing mentions	Sales Process: Helps identify if reps are discounting or discussing price too early.
Percentage of opps without multi-threading	Risk Assessment: Highlights deals relying on fewer than three contacts (single-threaded risk).
Percentage of opps with next steps	Pipeline Health: Measures if reps are consistently driving momentum at the end of calls.
Win rate with competitive mentions	Enablement: Measures the effectiveness of competitive battlecards and positioning.

Administrator Tips for Success

- **Custom Report Types:** To join Chorus data with your specific business fields (like "Region" or "Lead Source"), you may need to create **Custom Report Types** (e.g., *Opportunities with Engagements with Moments*).
- **Permissions:** Ensure that the relevant User Profiles or Permission Sets have **Read** access to both the **Engagement** and **Moment** custom objects.
- **Sync Timing:** Data typically syncs to Salesforce after the Chorus recording has finished processing and the transcription is finalized. The total time from call end to CRM sync is generally **30–60 minutes**, though this can vary based on recording length and system load.



Create Custom Objects for Chorus and Salesforce

Chorus custom objects for Salesforce unlock greater flexibility for reporting, data analysis and triggering workflows by connecting granular Chorus data directly with your Salesforce instance.

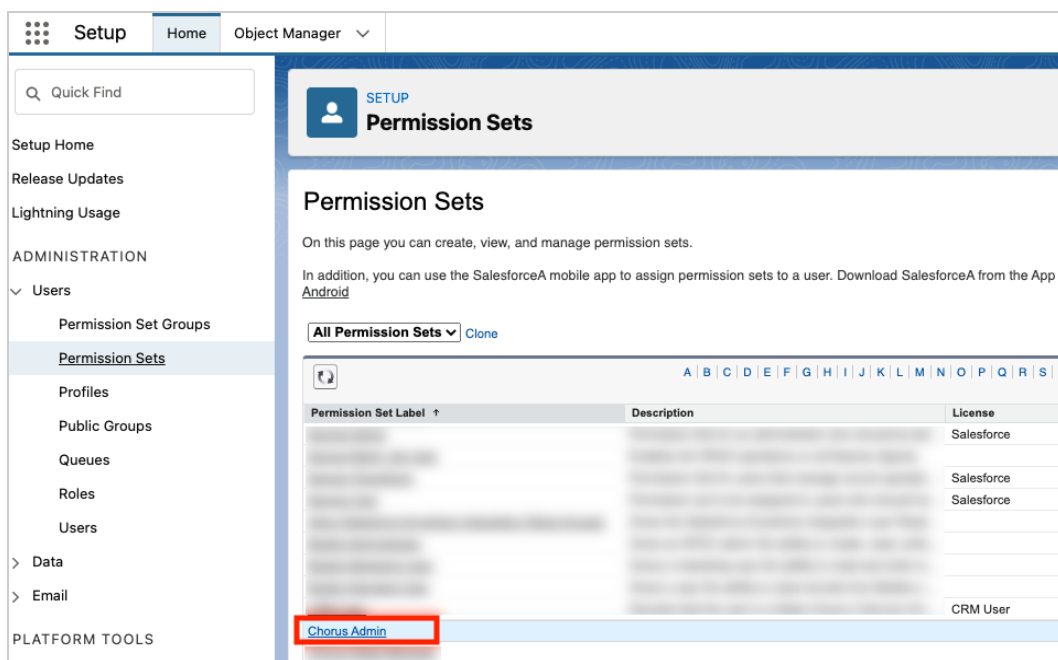
Before You Begin

In order to access Chorus custom objects in Salesforce, you must have successfully [installed the Chorus for Salesforce managed package](#).

Assign Permission Sets for Chorus Custom Objects

The managed package includes permission sets labeled **Chorus Admin**. You can assign the included permission sets to users who will need to view, create, and edit reports.

1. Go to **Setup > Users > Permission Sets** and select the **Chorus Admin** permission set.



Note: This permission set will grant the selected users access to custom objects and fields in Salesforce.

2. Click **Manage Assignments**.

The screenshot shows the Salesforce Setup interface. On the left is a navigation menu with options like 'Setup Home', 'Service Setup Assistant', 'Multi-Factor Authentication Assistant', 'Release Updates', 'Lightning Experience Transition Assistant', 'New Salesforce Mobile App QuickStart', 'Lightning Usage', 'Optimizer', 'ADMINISTRATION', and 'Users'. The 'Users' section is expanded, showing 'Permission Set Groups', 'Permission Sets', and 'Profiles'. The 'Permission Sets' option is selected. The main content area shows the 'Permission Set' for 'Chorus Admin'. There is a search bar 'Find Settings...' and a 'Close' button. The 'Manage Assignments' button is highlighted with a red box. Below this, there is a 'Permission Set Overview' section with fields for 'Description', 'License', 'Session Activation Required', and 'Last Modified By'. The 'Last Modified By' field shows 'John Doe, 8/16/2021, 5:18 AM'. There is also an 'Apps' section with links for 'Assigned Apps', 'Assigned Connected Apps', and 'Object Settings'.

3. Click **Add Assignments**.

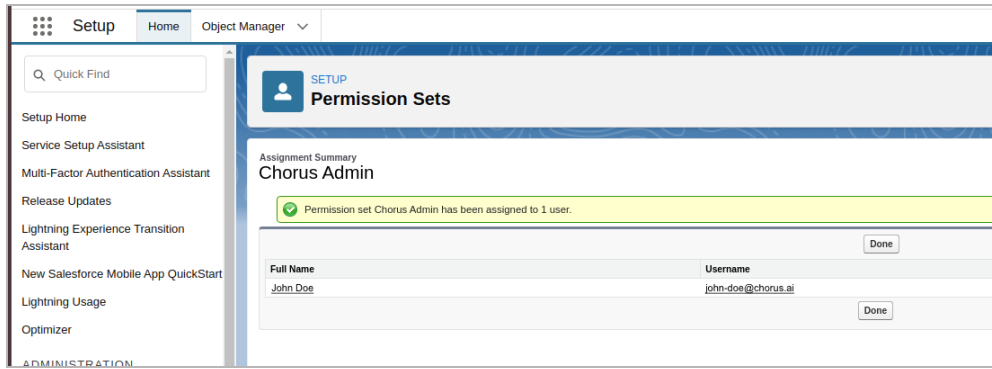
The screenshot shows the Salesforce Setup interface, specifically the 'Assigned Users' page for the 'Chorus Admin' permission set. The navigation menu on the left is the same as in the previous screenshot. The main content area shows the 'Assigned Users' section for 'Chorus Admin' with a 'Back to: Permission Set' link. There is a table with columns: 'Full Name', 'Alias', 'Username', 'Last Login', and 'Role'. The table is currently empty, showing 'No records to display.' Below the table, there are 'Add Assignments' and 'Remove Assignments' buttons. The 'Add Assignments' button is highlighted with a red box.

4. Select the users who need the permission set and click **Assign**.

Note: At a minimum, include the Chorus-Salesforce integration user.

5. Click **Done**.





6. Validate that the users who need to access reports and Engagement/Moment objects have access to Apex Class "**ChorusSyncService**". Review [this guide](#) for more information on Apex Class Access.

Connect Chorus Custom Objects to Salesforce Reports

You can add Chorus custom objects to your Salesforce reports with the following steps:

1. Go to **Salesforce Setup > Object Manager** and confirm that you see the **Engagement** object.
2. Click **Edit**.
3. Scroll to **Optional Features**, check **Allow Reports** then click **Save**.

Edit Custom Object Engagement (Managed) [Help for this Page](#)

This Custom Object Definition is managed, meaning that you may only edit certain attributes. [Display More Information](#)

Custom Object Definition Edit Save Save & New Cancel

Custom Object Information I = Required Information

The singular and plural labels are used in tabs, page layouts, and reports. Be careful when changing the name or label as it may affect existing integrations and merge templates.

Label Example: Account

Plural Label Example: Accounts

Starts with vowel sound ☐

The Object Name is used when referencing the object via the API.

Object Name Example: Account

Description

Context-Sensitive Help Setting ☒ Open the standard Salesforce.com Help & Training window ☐ Open a window using a Visualforce page

Content Name

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name Example: Account Name

Data Type

Optional Features

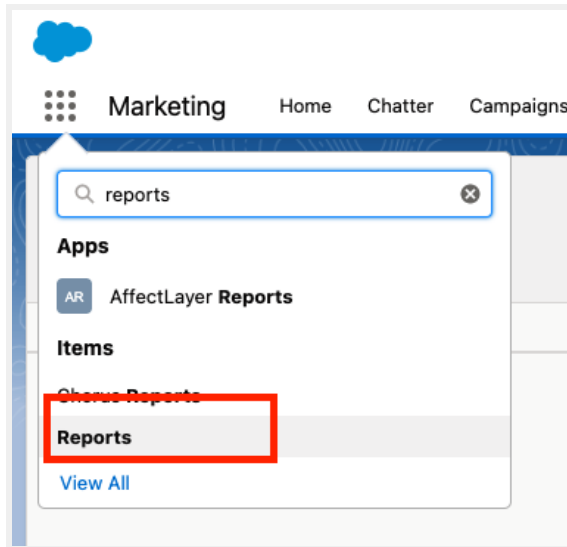
- ☒ Allow Reports
- ☒ Allow Activities
- ☒ Track Field History
- ☒ Allow in Chatter Groups

4. Repeat these steps for the **Moment** object.

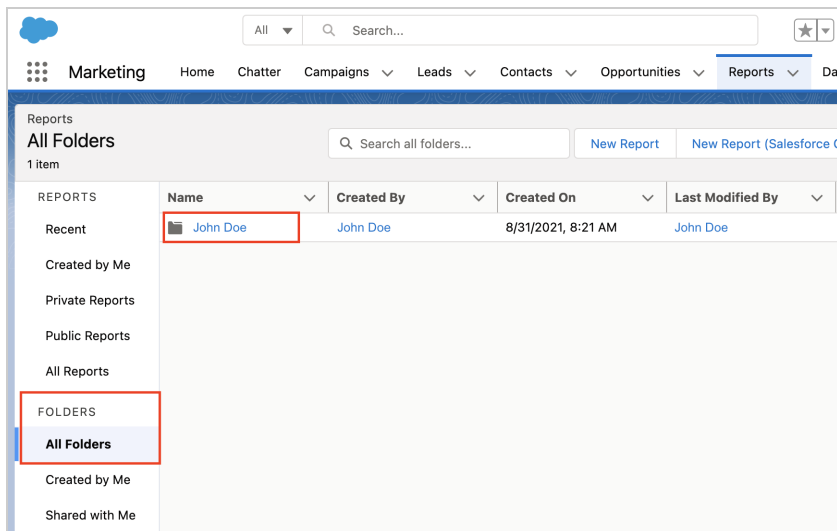


Access Chorus Pre-Built Reports

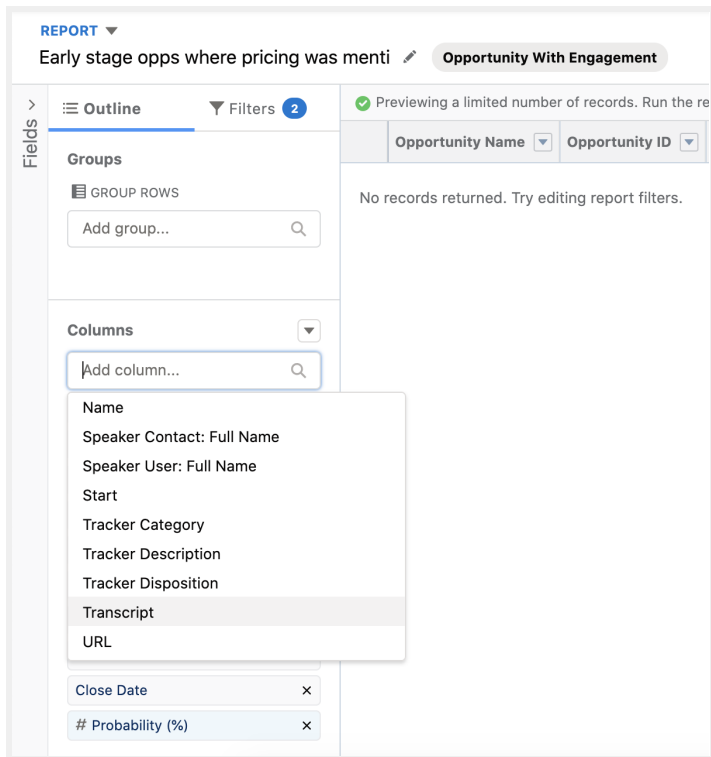
1. In Salesforce navigate click the **App Launcher** and search for **Reports**.



2. Navigate to **Folders > All Folders > ChorusReports**.



3. This page displays a list of pre-built reports using Chorus custom objects. You can modify these reports as needed.

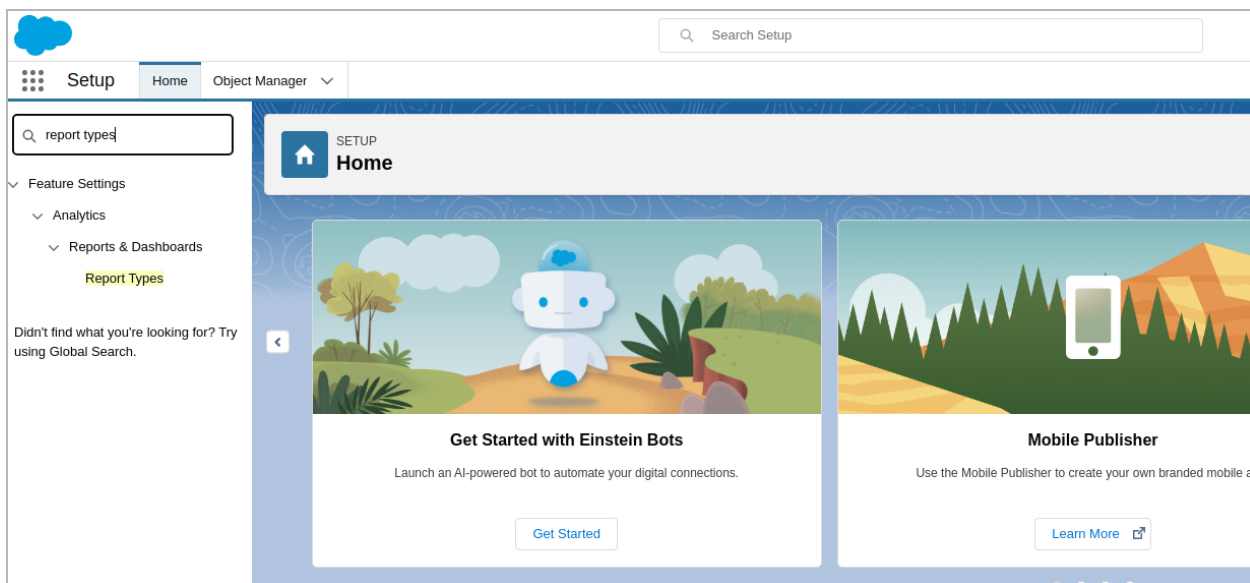


Deploy Custom Report Types Before You Begin

If you are using version 1.155 of the Chorus CTI, change the development status of the Custom Report Types to “Deployed”. This can only be done by a Salesforce admin.

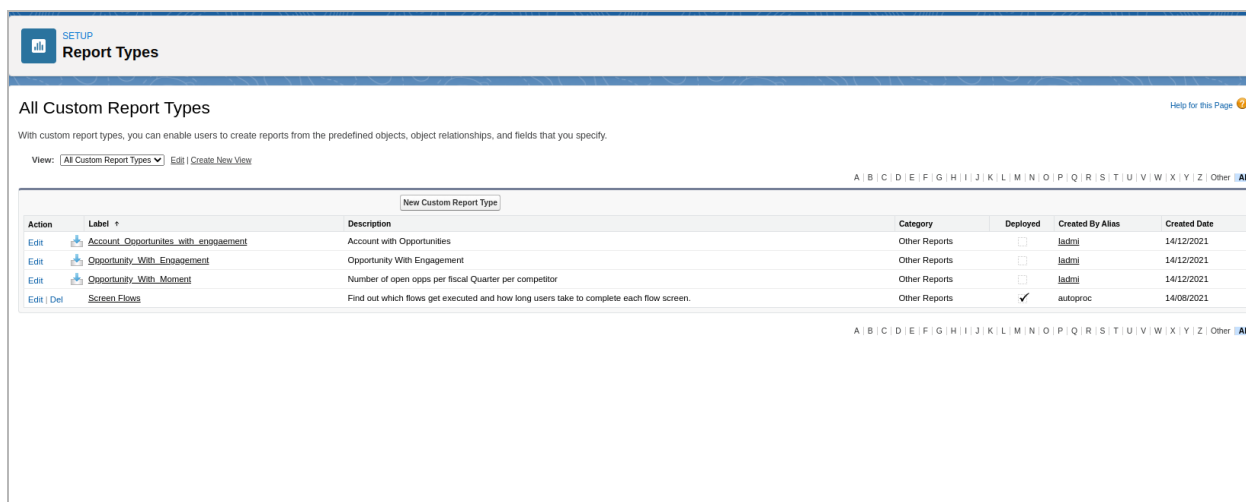
Procedure

1. Go to **Setup > Quick Find** and type **Report Types**.



2. Click **Report Types** and locate the report type with the label “Account_Opportunities_with_engagement”.

3. Click **Edit**.



Report Types

All Custom Report Types

With custom report types, you can enable users to create reports from the predefined objects, object relationships, and fields that you specify.

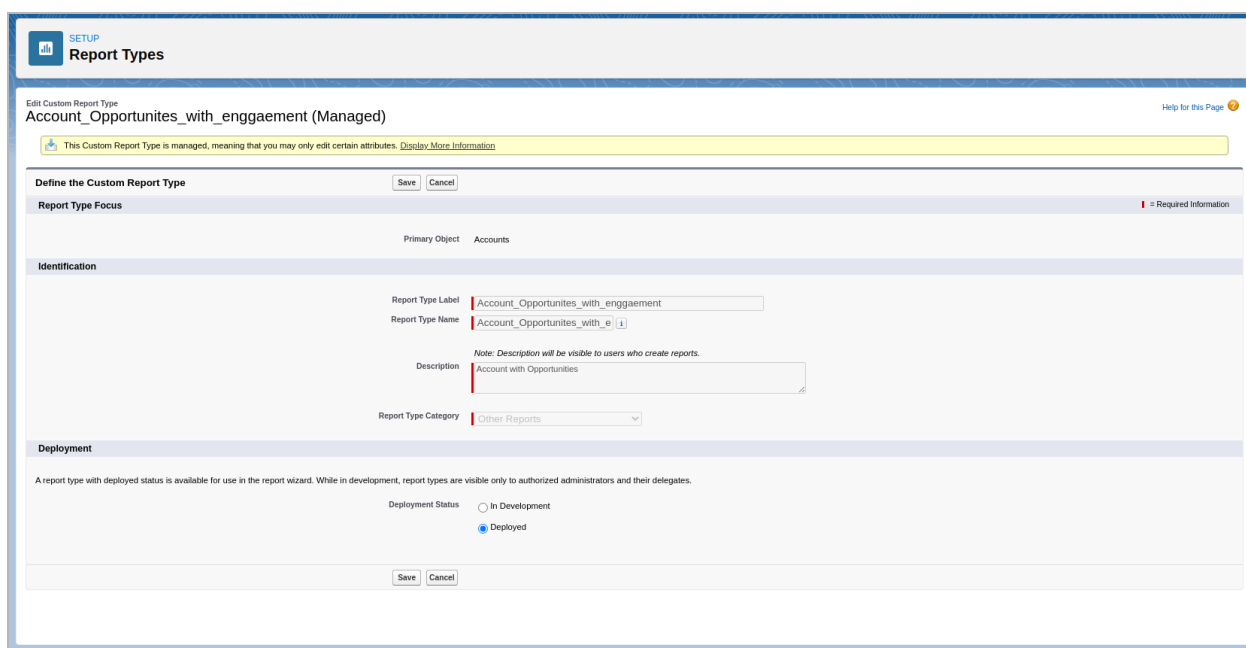
View: All Custom Report Types | Edit | Create New View

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 | Other | All

Action	Label	Description	Category	Deployed	Created By Alias	Created Date
Edit	Account Opportunities with engagement	Account with Opportunities	Other Reports	☐	ladmi	14/12/2021
Edit	Opportunity With Engagement	Opportunity With Engagement	Other Reports	☐	ladmi	14/12/2021
Edit	Opportunity With Moment	Number of open opps per fiscal Quarter per competitor	Other Reports	☐	ladmi	14/12/2021
Edit Del	Screen Flows	Find out which flows get executed and how long users take to complete each flow screen.	Other Reports	☒	autoproc	14/08/2021

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 | Other | All

4. Change the custom report type's **Development Status** to **Deployed**.



Report Types

Edit Custom Report Type

Account_Opportunities_with_enggaement (Managed)

This Custom Report Type is managed, meaning that you may only edit certain attributes. [Display More Information](#)

Define the Custom Report Type [Save] [Cancel]

Report Type Focus [Required Information]

Primary Object Accounts

Identification

Report Type Label Account_Opportunities_with_enggaement

Report Type Name Account_Opportunities_with_e

Description Account with Opportunities

Report Type Category Other Reports

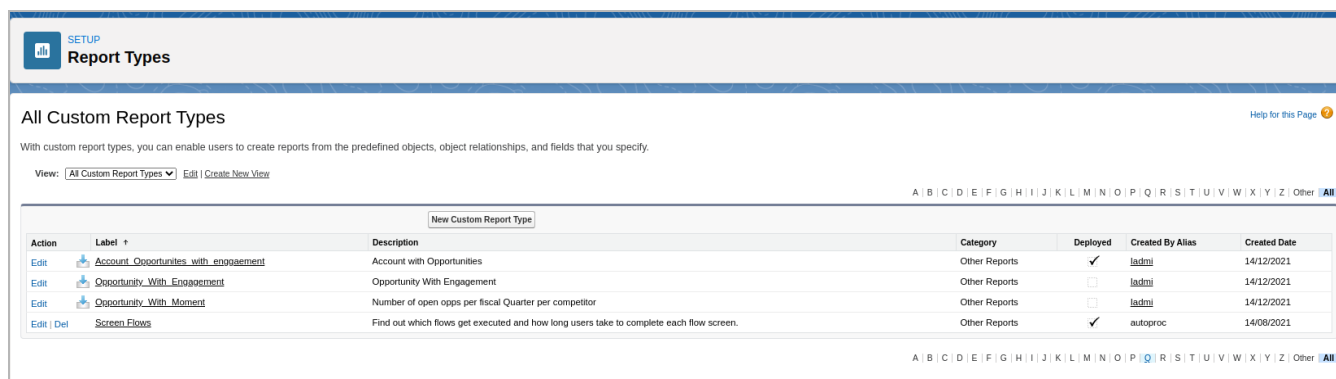
Deployment

A report type with deployed status is available for use in the report wizard. While in development, report types are visible only to authorized administrators and their delegates.

Deployment Status ☐ In Development ☒ Deployed

[Save] [Cancel]

5. Click **Save**. Ensure that the **Deployed** column shows a check mark for the report.



Report Types

All Custom Report Types

With custom report types, you can enable users to create reports from the predefined objects, object relationships, and fields that you specify.

View: All Custom Report Types | Edit | Create New View

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 | Other | All

Action	Label	Description	Category	Deployed	Created By Alias	Created Date
Edit	Account Opportunities with engagement	Account with Opportunities	Other Reports	☒	ladmi	14/12/2021
Edit	Opportunity With Engagement	Opportunity With Engagement	Other Reports	☐	ladmi	14/12/2021
Edit	Opportunity With Moment	Number of open opps per fiscal Quarter per competitor	Other Reports	☐	ladmi	14/12/2021
Edit Del	Screen Flows	Find out which flows get executed and how long users take to complete each flow screen.	Other Reports	☒	autoproc	14/08/2021

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 | Other | All



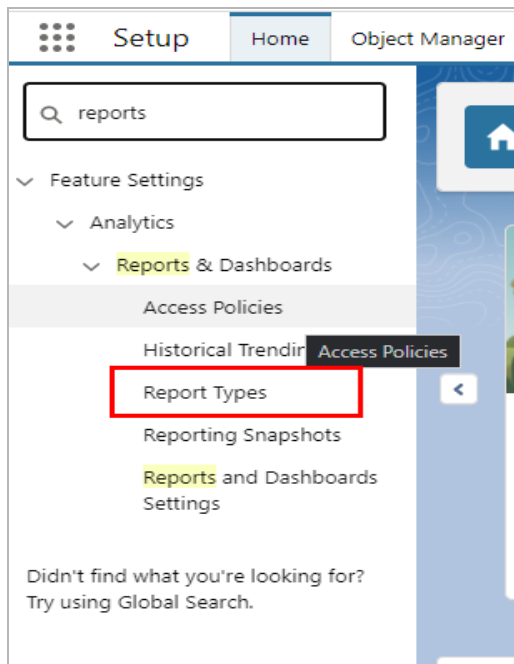
6. Repeat the same process for the remaining reports:

- Opportunity_With_Engagement
- Opportunity_With_Moment

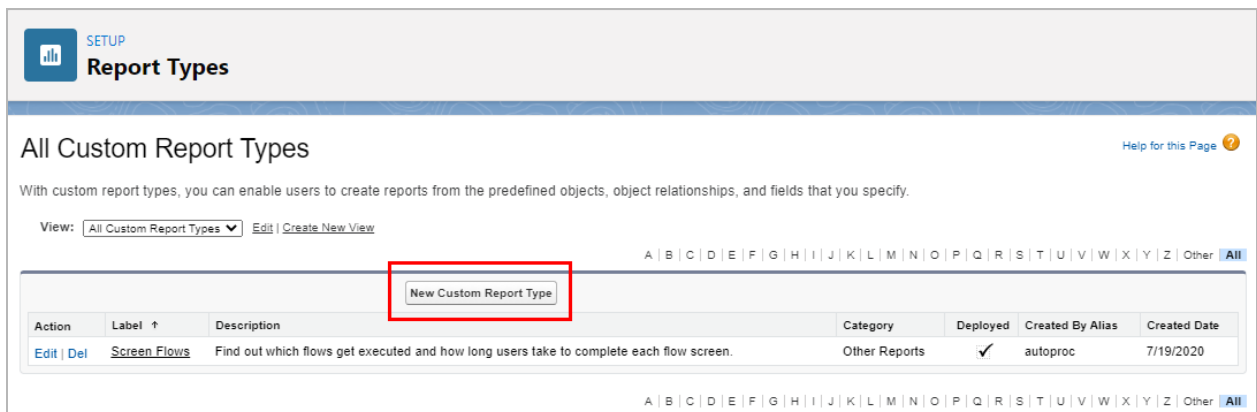
Create Report Types with Chorus Custom Objects

To create custom report types:

1. In Salesforce, go to **Setup**.
2. Type "Report Types" in the search box.



3. Click **Continue** and then click **New Custom Report Type**.



4. Complete the fields as shown in the image below.

Report Types

Report Type Focus ! = Required Information

Specify what type of records (rows) will be the focus of reports generated by this report type.
Example: If reporting on "Contacts with Opportunities with Partners," select "Contacts" as the primary object.

Primary Object: --Select-- ← Select the primary object. Ex- Engagement

Identification

Report Type Label: ← Give the report name

Report Type Name: i

Description: ← Enter description
Note: Description will be visible to users who create reports.

Store in Category: --Select-- ← Select the category in which you want to save.

Deployment

A report type with deployed status is available for use in the report wizard. While in development, report types are visible only to authorized administrators and their delegates.

Deployment Status: ☒ In Development ← Choose the option accordingly ☐ Deployed

Click Next Next Cancel

- The **Primary Object** you selected will display, and you can optionally include up to 4 additional objects based on their relation.

New Custom Report Type
Test report Help for this Page ?

Step 2. Define Report Records Set Step 2 of 2

Previous Save Cancel

This report type will generate reports about Accounts. You may define which related records from other objects are returned in report results by choosing a relationship to another object.

A Accounts
Primary Object

(Click to relate another object)

← Click to add another object

Previous Save Cancel

For reference, here is a report with 4 objects added: **Accounts, Opportunities, Engagements** and **Moments**. In this scenario, you can also set up a relationship between them. For example, refer to the radio button on **Opportunities**.



SETUP
Report Types

This report type will generate reports about Accounts. You may define which related records from other objects are returned in report results by choosing a relationship to another object.

A Accounts
Primary Object

B Opportunities
A to B Relationship:
☒ Each "A" record must have at least one related "B" record.
☐ "A" records may or may not have related "B" records.

C Engagements
B to C Relationship:
☒ Each "B" record must have at least one related "C" record.
☐ "B" records may or may not have related "C" records.

D Moments
C to D Relationship:
☒ Each "C" record must have at least one related "D" record.
☐ "C" records may or may not have related "D" records.

Object Limit Reached
You can associate up to four objects to a custom report type.

- Once saved you can edit the layout if needed.

SETUP
Report Types

Object Relationships [Edit](#) [Object Relationships Help ?](#)

Accounts (A)
 with at least one related record from **Opportunities (B)**
 with at least one related record from **Engagements (C)**
 with at least one related record from **Moments (D)**

Fields Available for Reports [Edit Layout](#) [Preview Layout](#) [Fields Available for Reports Help ?](#)

Source	Selected Fields
Accounts	63
Opportunities	36
Engagements	33
Moments	19

- Navigate back to **Reports** from the **App Launcher**. You will see the newly created report showing in the category that you previously defined.

You can use the newly created Report Type to start building reports and running data analysis on Chorus data within Salesforce.

Add Chorus Custom Objects to Opportunities and Contacts

To add custom objects as a Related List to the Opportunity or Contact Page layout:

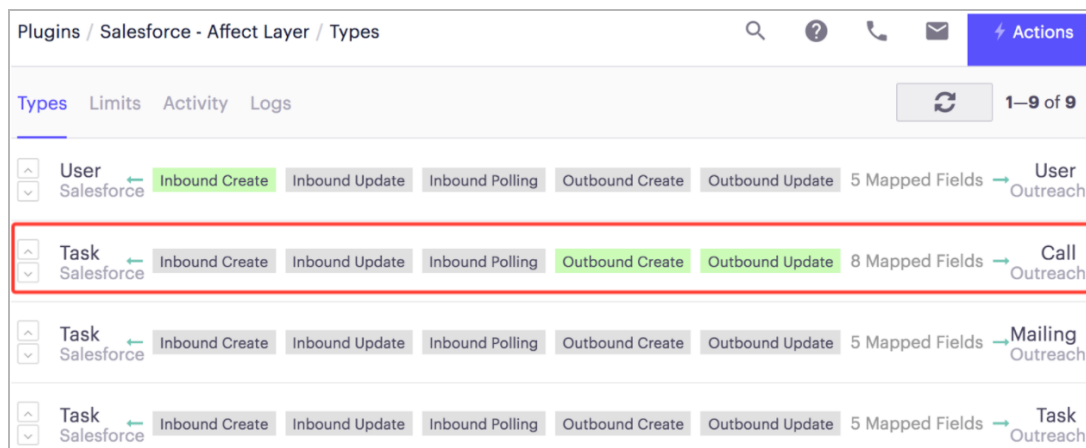
1. Go to **Setup > Object Manager** and search for "opportunity".
2. Select **Page Layouts** and click **Edit > Related Lists** from the top panel.
3. Drag and drop the appropriate Related List from the top panel to the page layout.
4. Click **Save**.

Note: If participants are not matched to contacts based on the email address found, Chorus will create contacts in order to support contact level reporting and associate them to Moments (and by extension, Engagements). To turn this off, contact chorussupport@zoominfo.com.

Push Outreach Recordings to Salesforce

If you use the Outreach dialer to record your outbound sales calls, you can map these call recordings to your Salesforce instance. To do this you must create a custom field at the Task level in Salesforce and map the calls from Outreach to this field. Once this is configured, you can integrate Outreach with Chorus. Chorus will pull in the recordings every hour.

1. In Outreach, go to **Settings > Plugins > Salesforce > Tasks (Calls) > Fields**.
2. Under **Plugins**, toggle on **Salesforce Affect Layer**.
3. Under **Tasks** enable **Outbound Create** and **Outbound Update**.



4. Map the Outreach **Recording URL** call field to the Salesforce **Call Recording** task field.



Plugins / Salesforce - Affect Layer / Tasks <-> Calls

Sync **Fields** Mappings ↺ + Add

Outreach Call Field		Salesforce Task Field	Updates In	Updates Out
Completed At	↔	Due Date Only		☒
User	↔	Assigned To ID	☒	☒
Prospect	↔	Name ID	☒	☒
Note	↔	Description	☒	☒
Custom Template...	↔	Subject		☒
Call Direction	↔	Call Type		☒
Call Disposition Name	↔	Call Result		☒
Recording URL	↔	Call Recording		☒

Important: If you don't have an existing field in Salesforce set to push the Recording URL, you'll need to create one.

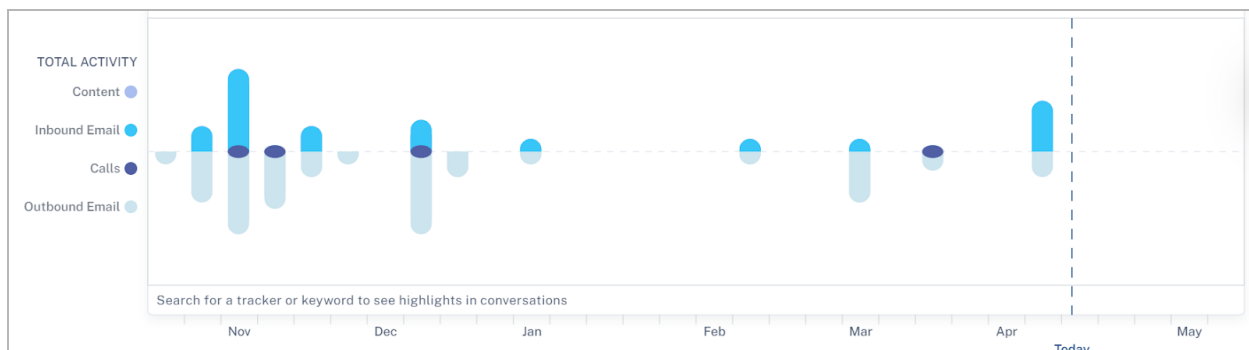
Sync Chorus Trackers with Salesforce

Once Salesforce has been synced and the Salesforce managed package has been installed, you can also sync your **Chorus Trackers** back to Salesforce. This allows you to distribute the relevant information provided by Chorus where users and managers can easily see it.

For each Chorus recording, the identified Trackers are uploaded to Salesforce and can be used in reporting, workflows, data aggregation and Opportunity management.

Here are some examples:

- **Enriched Reporting:** With Chorus Trackers synced to Salesforce, Executive dashboards, Manager reporting and daily views can be automatically updated based on the latest conversation data.



- **Competitive Deal Insight:** If a Salesforce field is automatically checked on the Opportunity, whenever "Competitor 1" is mentioned by the prospect on any call, reps and managers can instantly determine if this is a competitive Opportunity. Additionally, the "Competitor 1" field can be used to filter and determine which deals are competitive across the entire pipeline.

To sync Chorus Trackers with Salesforce:

1. In Salesforce, click **Setup**.
2. Click the **Opportunities** object, then select the **Fields & Relationships** section.
3. Scroll down and click **New**.
4. Select **Text** option.
5. Label the field '**Chorus Competitor**.'
6. Provision access to the field.
7. Select the desired Layouts.
8. Click **Setup** and navigate to the **Create** tab and select **Workflow & Approvals > Workflow Rules**.
9. Click **New Rule**.
10. Select the **Opportunity** object.
11. Label the rule '**Chorus Competitor**', select the **Evaluation Criteria** as **created**, and **any time it's edited to subsequently meet criteria**. Within the Rule Criteria, add **True** and click **Save**.
12. Click **Add Workflow Action** and select **New Field Update**.
13. Label the field update, **Chorus Competitor** and click the field to update and select **Chorus Competitor**.
14. Select **Use a formula to set the new value** then type the following formula:
 - a. IF (CONTAINS (Chorus_Competitor__c "Your competitor name"), "Your competitor name", "Text that will display if competitor is not found")
15. Return to the Workflow Rules section within Setup, and click **Activate** on the **Chorus Competitor** workflow.

HubSpot Integration

Admins can sync Chorus with HubSpot to ensure that every conversation is tied to an outcome. For example, who was called and when, what was discussed, deal progression, stages, and so on. This integration will associate your calls with the correct Company Name, Deal Name, Deal Stage, Deal Size, and Close Date allowing you to filter calls to the ones you care about most. Syncing will also create activity with data from your Chorus calls inside HubSpot.

To integrate Chorus with HubSpot:

1. Log in to Chorus and navigate to the **Integrations** page.
2. Select **Enable** next to the **HubSpot Connect** option.
3. Provide your HubSpot admin credentials. HubSpot will send a confirmation code to your email account.
4. Enter the code from HubSpot into the field provided.
5. Select your account.
6. You are prompted to connect. Select **Connect app**.

Push Call Activity to HubSpot (Automatic Task Creation)

Once HubSpot is synced with Chorus, Chorus will automatically log your team's activity from their scheduled screen share meetings in HubSpot. The sync includes information about call participants, meeting subject, meeting date, next steps and other tracked topics found in the transcript.

CRM Connect

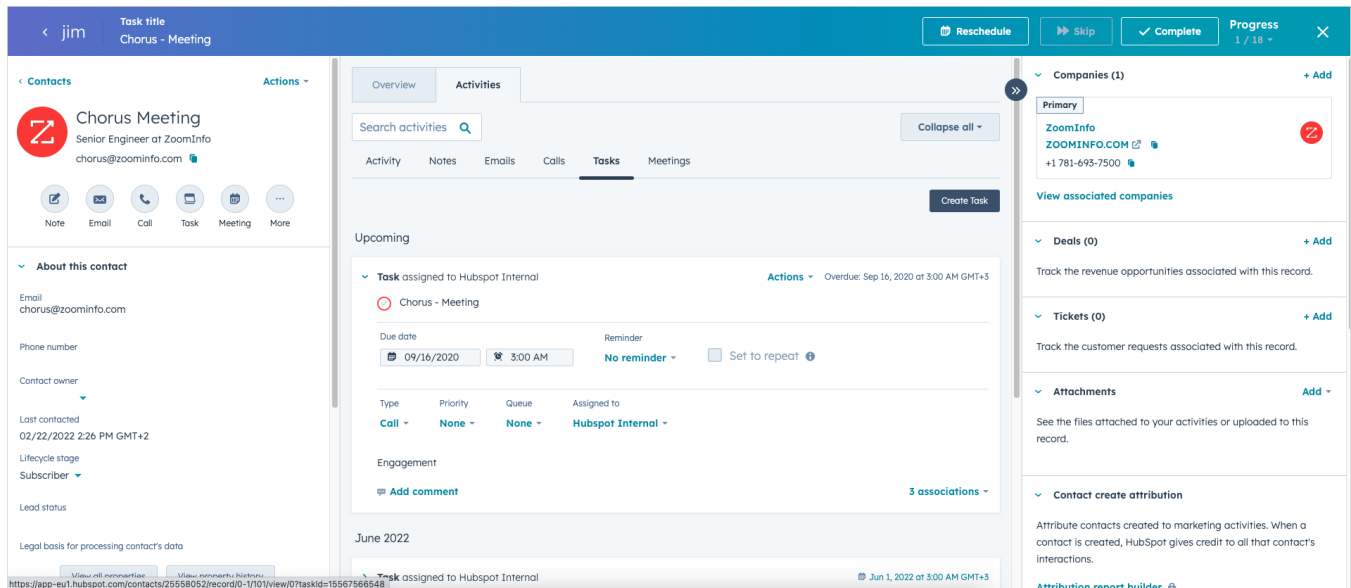
 HubspotConnect Enabled

CRM Objects Creation

Chorus can automatically create objects in CRM for different engagement types. You can choose below the required engagement type(s) for each setting to control which objects you would like to push into CRM. It is possible to create a Task, an Event, or both.

Create a call ?	☐ Recording	☐ Email	
Create an email ?	☐ Recording	☐ Email	☐ Unrecorded Meeting
Create an event ?	☒ Recording	☐ Email	☐ Unrecorded Meeting
Create a task	☐ Recording	☐ Email	
Create account if not exist			

Here's an example of a pushed task in HubSpot:



About Pushed Tasks

The default task type for Chorus tasks is Call. However, this can be modified in HubSpot.

The Pushed Tasks feature is on by default, but can be turned off if necessary by a Chorus admin using the following steps:

1. Click on your initials in the navigation bar.
2. Select Settings, then navigate to the Integrations page.

Pushed Tasks Naming Convention

All tasks pushed into HubSpot from Chorus have a naming convention that begins with "Chorus -" and ends with the name of the scheduled meeting (e.g., Chorus - Wonka and Schrute Farms Connect).

Microsoft Dynamics Integration

Admins can sync Chorus with Microsoft Dynamics to ensure that every conversation is tied to an outcome. For example, who was called and when, what was discussed, deal progression, stages, and more. This integration will associate calls with the correct Company Name, Deal Name, Deal Stage, Deal Size, and Close Date, allowing you to filter calls to the ones you care about the most. Syncing Chorus with Microsoft Dynamics will also create activity with data from your Chorus calls inside Dynamics.

To integrate Chorus with Dynamics:

1. Log in to Chorus and navigate to the **Integrations** page.
2. Click **Enable** next to the **DynamicsConnect** option.
3. Type or paste your organization's unique Dynamics URL.



Note: You can find this link when logging into Dynamics. It will look similar to <https://EXAMPLE.crm.dynamics.com>.

4. Click **Connect**.
5. Log in to Microsoft Dynamics.

Push Call Activity to Microsoft Dynamics (Automatic Task or Event Creation)

Once Microsoft Dynamics is synced with Chorus, Chorus will automatically log your team's activity from their scheduled screen share meetings in Microsoft Dynamics. The sync includes information about call participants, meeting subject, meeting date, next steps and other tracked topics found in the transcript.

CRM Connect

 Microsoft DynamicsConnect Enabled

CRM Objects Creation

Chorus can automatically create objects in CRM for different engagement types. You can choose below the required engagement type(s) for each setting to control which objects you would like to push into CRM. It is possible to create a Task, an Event, or both.

Create an event ?	☐ Recording	☐ Email	☐ Unrecorded Meeting
Create a task	☒ Recording	☐ Email	☒ Unrecorded Meeting
Create account if not exist	☐ Recording	☐ Email	

Here's an example of a pushed task in Microsoft Dynamics:

Comments

RECORDING:
<https://chorus.ai/meeting/3810048?call=CD2590C3E9CE4885ADE9C6D213C44870123>

ATTENDEES:
Michael Scott, Regional Manager
Dwight Schrute, Assistant to the Regional Manager
Todd Packer, Field Sales
Fake Acme Employee, Account Executive

KEY TOPICS DISCUSSED:
Impact, Competitor 1, Pain, Budget, Need, Metrics, Background, Use Case, Timing, Authority

NEXT STEPS (TRANSCRIPT):
* Sure, I'll send you the invite for Friday at 3pm. Anything else I could answer for you?
* There's a bunch of other security documentation as well, I'll shoot them over after the call
* Great question, let me ask my solutions engineer and i'll get back to you

About Pushed Tasks

The default task type for Chorus tasks is Call. However, this can be modified in Dynamics.

The Pushed Tasks feature is on by default, but can be turned off if necessary by a Chorus admin using the following steps:

1. In Chorus click **Settings > Integrations**.
2. Scroll to **CRM Objects Creation**.
3. Select **Create an event**, or **Create a task**.

CRM Objects Creation
Chorus can automatically create objects in CRM for different engagement types. You can choose below the required engagement type(s) for each setting to control which objects you would like to push into CRM. It is possible to create a Task, an Event, or both.

Create an event ?	☒ Recording	☐ Email	☒ Unrecorded Meeting
Create a task	☒ Recording	☐ Email	☒ Unrecorded Meeting
Create tracker / metadata	☒ Recording	☐ Email	
Create a custom object	☒ Recording	☒ Email	
Create contact if not exist	☐ Recording	☐ Email	
Create account if not exist	☐ Recording	☐ Email	
Push transcript	☐ Recording		

Note: Events created this way will appear as Outlook appointments. There is additional information on tracking Outlook appointments in Dynamics 365 in [this Microsoft article](#).

Pushed Tasks Naming Convention

All tasks pushed into Microsoft Dynamics from Chorus have a naming convention that begins with "Chorus -" and ends with the name of the scheduled meeting (e.g., Chorus - Wonka and Schrute Farms Connect).

Create Tasks for Unrecorded Meetings (Salesforce, HubSpot, and Dynamics)

Occasionally, you may have a business case where customer calls do not need to be recorded. However, without the recordings, it is difficult to establish an accurate total number of customer interactions.

You can get a more complete record of customer interactions, even the ones that weren't recorded, by enabling task creation for calls. This feature will create a task in Salesforce, HubSpot, and Dynamics.

How it works (Admins):

Chorus admins can enable this feature from **Integrations > CRM Objects Creation > Create a task**.



CRM Objects Creation

Chorus can automatically create objects in CRM for different types. You can choose below the required engagement types to control which objects you would like to push into CRM.

Meetings where recording is disabled, includes only internal or ignored participants, or has at least one block-listed participant will not be pushed.

Create a task	☐ Recording	☐ Email	☐ Unrecorded Meeting
Create tracker / metadata	☐ Recording	☐ Email	
Create a custom object	☐ Recording	☐ Email	
Create contact if not exist	☐ Recording	☐ Email	
Create account if not exist	☐ Recording	☐ Email	
Push transcript	☐ Recording		

Notes:

- Meetings that are turned off (the user explicitly asked Chorus not to record) will not be pushed.
- Meetings with only internal or ignored participants will not be pushed.
- Meetings with at least one block-list participant will not be pushed.

Delete Non-compliant Dialer Calls

Admins can use role-based permissions to configure which calls should be deleted if the recording notification is missing at the beginning of a call.

Calls owned by users with this setting enabled will auto-delete if recording notification is missing.

How it works (Admins):

Navigate to **Settings > Roles and Permissions > Compliance > Delete calls without recording notification > Enabled**.

COMPLIANCE

Compliance Mode

Users with this setting turned on will be enrolled in automated workflows to ensure compliant call recording. [Learn more](#)

☒ Enabled?

☐ Enforced?

Delete Calls Without Recording Notification

Calls owned by users with this setting turned on will be automatically deleted if there is no recording notification at the beginning of the call.

☒ Disabled

☐ Enabled

Who gets it? All organizations with Enterprise packages.

Account & Opportunity Matching

Every call, meeting, and email captured by Chorus is automatically matched to an Account and potentially an Opportunity in your CRM. This section explains the matching logic Chorus uses, how tiebreakers work when multiple records qualify, and what you can do to improve accuracy.



Section 1: Account Matching

How Chorus identifies the right Account record for each engagement

Chorus uses a sequential, domain-first process to match engagements to CRM Account records. Once a step produces a confident match, Chorus stops and does not continue to subsequent steps.

- 1. Domain Extraction**
Chorus extracts the email domains of all external participants on the engagement (e.g. acme.com from john@acme.com). Your company's internal domain is excluded from matching.
- 2. ZoomInfo Company ID Lookup**
If you have the ZoomInfo Managed Package installed, Chorus retrieves the ZoomInfo Company ID for the identified domain and queries using the ZoomInfo Company ID field on the Account. This is the highest-confidence matching method.
- 3. Domain-Based CRM Search**
Chorus searches your CRM for Account records whose standard fields (Website, Domain, Email) match the participant domain. Custom fields are not included. When multiple participant domains are present, they are sorted by prevalence and by the number of open Opportunities with the nearest close dates.
- 4. Ownership Boost**
Among domain-matched results, Accounts owned by a participant on the engagement are ranked higher.
- 5. Fallback: Exact Email Match**
If domain-based matching does not produce a definitive result, Chorus falls back to exact email matching — looking for a Contact or Lead record whose email address exactly matches a participant on the engagement.

Account Tiebreaker Logic

When multiple Account records match the same domain, Chorus applies the following tiebreaker sequence in priority order:

Priority	Criterion
1	Account Type = Customer — Accounts with a Customer type are preferred over Prospect or other types
2	Account Ownership — Accounts owned by the engagement host or a participant are ranked higher



Priority	Criterion
3	Open Opportunity Presence — Accounts with at least one open Opportunity are preferred
4	Opportunity Ownership Alignment — Accounts where the Opportunity owner matches an engagement participant are ranked higher
5	Last Modified Date — The more recently modified Account is preferred
6	Account Record Type — The Account record type is used as a differentiator when prior criteria do not resolve the match
7	Parent vs. Child Hierarchy — Parent Account records are preferred over Child records

Tip: Improving Account Matching Accuracy

If you are seeing unexpected Account matches: (1) Install the ZoomInfo Salesforce Managed Package to enable ZI Company ID matching. (2) Establish Parent/Child Account hierarchies for related or regional accounts. (3) Keep Account Website and Domain fields populated and accurate in your CRM. For additional help, contact chorussupport@zoominfo.com.

Section 1A: Alternative Matching Mode: Contact / Lead First

How matching logic changes when Contact/Lead First mode is enabled

By default, Chorus uses a domain-first approach to Account matching (described in Section 1). However, Contact/Lead First mode can be enabled for your account, which reverses the priority order — starting with an exact email lookup against Contact and Lead records before attempting domain-based Account matching.

When is Contact/Lead First the right choice?

This mode works best when your CRM has high-quality, well-maintained Contact and Lead records with accurate Account associations. It is particularly useful in environments where many Account records share the same domain (e.g. large enterprise customers with multiple subsidiaries) and Contact-level ownership is a more reliable signal than domain matching alone.

Matching Steps: Contact / Lead First Mode

1. Exact Email Match — Contact Records

Chorus searches your CRM for a Contact record whose email address exactly matches an



external participant on the engagement. If a matching Contact is found, the Account associated with that Contact is used as the CRM Account match.

2. Exact Email Match — Lead Records

If no Contact match is found, Chorus searches for a Lead record with an exact email match. If found, Chorus derives the Account association from the Lead's converted Account (if applicable) or uses the Lead record itself.

3. Fallback: Domain-Based Account Search

If neither a Contact nor Lead match is found via exact email, Chorus falls back to the standard domain-first matching process described in Section 1.

4. Opportunity Matching

Once an Account is identified via any method above, standard Opportunity matching applies as described in Section 2.

Domain First vs. Contact / Lead First

Consideration	Domain First (Default)	Contact / Lead First
Best for	Most customers — reliable even with incomplete Contact data	Teams with clean, well-maintained Contact/Lead records
Primary signal	Participant email domain matched to Account fields	Exact email match to Contact or Lead record in CRM
Risk: duplicate accounts	Tiebreaker waterfall handles duplicates systematically	Relies on Contact being linked to the correct Account
Risk: missing contacts	Low — domain matching works without Contact records	High — falls back to domain if no Contact/Lead found
ZI Package benefit	ZI Company ID improves domain matching precision	ZI Company ID used in domain fallback step only

Important: Floating Contacts Risk

In Contact/Lead First mode, matching accuracy depends entirely on the quality of your CRM Contact data. If Contact records are associated with the wrong Account, engagements will be matched to the incorrect Account. Regularly auditing Contact-to-Account associations in your CRM is strongly recommended when using this mode.

Enabling Contact / Lead First Mode

If your organization uses the ZoomInfo platform, you can enable Contact / Lead First matching in the ZoomInfo Admin Portal (GTM Studio) under CRM Integration settings. If you are on Chorus standalone, contact chorussupport@zoominfo.com to have this enabled for your account.



Section 2: Opportunity Matching

How Chorus associates engagements with the right Opportunity record

Once an Account has been matched, Chorus evaluates Opportunity records on that Account to determine which Opportunity the engagement should be associated with.

1. Open Opportunity Query

Chorus queries your CRM for all open (non-closed) Opportunities linked to the matched Account. Closed-Won and Closed-Lost Opportunities are excluded from the primary matching pass.

2. Close Date Prioritization

Chorus selects the Opportunity using the following logic, applied in order:

- **Open Opportunities exist:** Chorus selects the open Opportunity with the earliest close date that is not more than 30 days before today.
- **All Opportunities are closed:** Chorus selects the Opportunity with the latest close date AND most recent last modified date, where both fall within the past 30 days.
- **Neither condition returns a result:** Chorus selects the Opportunity with the most recent close date, regardless of how old it is.
- **No Opportunities qualify:** No Opportunity is matched. The engagement is associated with the Account record only.

3. Owner-Based Matching (Optional)

When owner-based matching is enabled for your account, Chorus filters Opportunities by ownership before applying close date logic. The ownership waterfall is applied at each close date step:

- First: Opportunities owned by the engagement organizer
- Then: Opportunities owned by CRM team members of the organizer
- Then: Opportunities owned by CRM managers
- Finally: All Opportunities on the matched Account (fallback)

To enable owner-based Opportunity matching, contact chorussupport@zoominfo.com.

4. No Opportunity Found

If no open Opportunity exists on the matched Account and no closed Opportunity meets the fallback criteria, the engagement is associated with the Account only. The Opportunity field will remain blank until a qualifying Opportunity is created or you manually reassociate the engagement (see Section 3).

CRM Activity Ownership

The Assigned To field on logged CRM activities (Tasks/Events) is configurable. When set



to CRM Owner, activities are assigned to the Salesforce Opportunity owner regardless of who attended the call. When set to Calendar Owner, activities are assigned to the meeting organizer. Equivalent settings exist for Account and Lead associations. To check or change how activity ownership is assigned for your account, contact chorussupport@zoominfo.com.

CRM-Specific Opportunity Matching Behavior

CRM	Matching Behavior	What This Means For You
Salesforce	Matches to the single best open Opportunity based on close date and ownership logic.	Each engagement is linked to one Opportunity. ZoomInfo Managed Package improves upstream Account matching accuracy.
HubSpot	Attaches the engagement to up to five of the most recent open Deals on the matched Company by default.	HubSpot admins can customize this in activity association settings. If a contact is linked to multiple companies, the engagement may appear on deals across those companies.
Microsoft Dynamics	Matches to open Opportunities on the matched Account using close date prioritization.	Behavior is consistent with Salesforce. Ownership alignment is used as a tiebreaker when close dates match.

Important: HubSpot Users

Unlike Salesforce and Dynamics, HubSpot's default behavior associates engagements with up to five of the most recent open Deals on the matched Company rather than selecting a single best match. Review your Deal-to-Company associations in HubSpot if you see activity on unexpected deals. Contact chorussupport@zoominfo.com to adjust the default for your account.

Section 3: Manual Reassociation

How to correct a CRM match after the fact

If Chorus associates an engagement with the wrong Account or Opportunity, you can correct it directly in the Chorus interface:

1. Open the recording or engagement in Chorus and navigate to the CRM details panel on the recording page.
2. Click the Account or Opportunity field to search for and select the correct CRM record.



3. Changes take effect immediately for that recording in Chorus.

Note: Manual reassociation applies to that specific recording only — it will not influence future automatic matching. Changes made in Chorus do not push the updated association to your CRM. Any tasks or engagement objects already written to Salesforce or HubSpot are not retroactively modified.

Section 4: Re-matching

Understanding when and why Chorus updates CRM associations after initial processing

Chorus may update an engagement's Account or Opportunity association after the initial match. This is normal and is designed to improve accuracy. For example, if a domain-based match is made first but a higher-confidence ZoomInfo Company ID match completes shortly after, Chorus will update the association to the more accurate result.

Matching Retry Window — Applies to Both Sections

Chorus automatically retries both Account and Opportunity matching for 24–72 hours post-call. If a CRM Account or Opportunity is created after the call but within this window, it may still be matched retroactively.

If you notice an association change and the updated result is incorrect, use the manual reassociation steps in Section 3 to correct it.

Section 5: Backfill Requests

Recovering CRM associations for historical engagements

If your CRM integration was disconnected or misconfigured for a period of time, historical engagements from that period may be missing Account or Opportunity associations. A backfill can be requested to retroactively populate this data.

When to request a backfill:

- Your Salesforce integration user was changed, deactivated, or lost permissions.
- Your HubSpot or Salesforce OAuth connection was disconnected and later reconnected.
- Engagements from a specific date range are missing Account or Opportunity associations in Chorus.
- CRM tasks or engagement records are absent for a known time period.

How to request a backfill:



- Contact chorussupport@zoominfo.com with your company name, the date range affected, and a description of the missing engagements.
- If possible, include the URL of an affected recording (e.g. chorus.ai/meeting/...) to help the support team locate your account.
- Backfills are processed by the ZoomInfo Engineering team and typically completed within 3–5 business days depending on volume.

Need Additional Help?

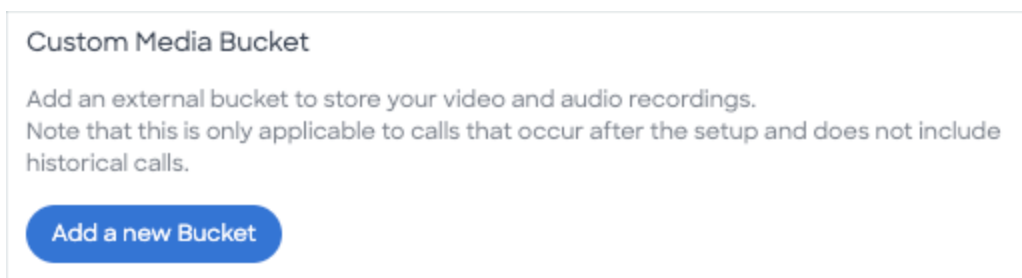
For matching issues not resolved by the steps in this guide, contact chorussupport@zoominfo.com. Include your company name, the URL of an affected recording (e.g. chorus.ai/meeting/...), and a description of the expected vs. actual CRM association.

Cloud Storage for Recordings (Custom Media Bucket)

Organizations with the Chorus Enterprise package can choose to store Chorus recordings in your object storage software such as AWS S3 and Google Cloud.

Admins can create a **Custom Media Bucket** in Chorus with the following steps:

1. Log in to Chorus and navigate to the **Integrations** page.
2. Scroll to **Custom Media Bucket**.



3. Click **Add a new Bucket**.
4. Enter **Custom Media Bucket** details in the popup.



5. Click **Save**.

Set Up Meeting Import (Post Meeting Downloading) with Chorus

During a video call, participants may be sensitive to recording or apprehensive about a Chorus Notetaker joining. Meeting Import (previously called Post Meeting Downloading) is an alternative method that records natively within your conference provider and automatically imports the recording and transcript into Chorus after the meeting ends. No Notetaker bot joins the call.

Meeting Import supports **Zoom, Microsoft Teams, and Google Meet**, and provides two key benefits:

- Eliminates bot presence concerns in sensitive customer meetings
- Provides more reliable conversation capture without bot admission dependencies

For complete setup instructions for each platform, including prerequisites, admin configuration, and troubleshooting, see the [Meeting Import Guide for Chorus](#).

Microsoft Teams Post-Call Download

Microsoft Teams Post-Call Download is an alternative integration method that automatically imports Teams native recordings into Chorus without requiring the Chorus notetaker bot to join meetings. This method eliminates meeting disruption from bot presence while providing reliable conversation capture.

Prerequisites

Before configuring Microsoft Teams Post-Call Download, ensure the following requirements are met:

- Microsoft Teams with cloud recording enabled
- Sufficient Microsoft Entra ID privileges to grant Microsoft Graph API permissions



- Administrative access to configure PowerShell policies

Important: Microsoft Teams Post-Call Download cannot be used simultaneously with the existing Chorus Teams bot integration. You must choose one method or the other.

Required Microsoft Graph API Permissions

The Microsoft Teams Post-Call Download integration requires the following Microsoft Graph API permissions:

- User.ReadBasic.All
- OnlineMeetings.ReadWrite.All
- OnlineMeetingRecording.Read.All
- OnlineMeetingTranscript.Read.All

Configure Application Access Policy

Before connecting the integration in Chorus, you must configure an application access policy in Microsoft Teams using PowerShell.

- Prerequisites: Windows or macOS system
- Administrative access to Microsoft Teams
- Global Administrator or Teams Administrator role

Platform-Specific Installation Steps:

PowerShell Setup

For Windows: 1. Search for "PowerShell" in the Start menu 2. Right-click and select "Run as Administrator"

For macOS: 1. Install PowerShell Core using Homebrew:

```
None  
brew install powershell
```

2. Launch PowerShell:

```
None  
pwsh
```

Installing Microsoft Teams PowerShell Module



Run the following command:

```
None  
Install-Module -Name MicrosoftTeams -Force
```

Note: If prompted about an untrusted repository, type 'Y' to proceed.

Connecting to Microsoft Teams

Run the following command:

```
None  
Connect-MicrosoftTeams
```

This will open a Microsoft sign-in window. Sign in with your Microsoft 365 administrator account.

Creating and Applying Application Access Policy

1. Create new policy:

```
None  
New-CsApplicationAccessPolicy -Identity "MeetingsPolicy" `  
-AppIds "abcf80d7-7474-40ee-8a2b-fcf025af84dc" `  
-Description "Policy for Teams meetings access"
```

2. Apply policy globally:

```
None  
Grant-CsApplicationAccessPolicy -PolicyName "MeetingsPolicy" -Global
```

3. Verification:

```
None  
Get-CsApplicationAccessPolicy | Select-Object Identity, Description, AppIds
```

Connect Microsoft Teams Post-Call Download in Chorus

Note: Sign in with an account that has sufficient permissions to create application access



policies. In most tenant configurations, this requires Teams Administrator or a custom role with Microsoft Teams policy management permissions.

After completing the PowerShell policy setup:

1. Navigate to Settings > Integrations > Conference Integration
2. Locate the Microsoft Teams Post-Call Download option
3. Click Connect to initiate Microsoft Graph API authentication
4. Sign in with your Global Administrator or Teams Administrator credentials
5. Grant the required permissions when prompted
6. Once authentication is complete, Post-Call Download will be available for your account

Note: If you previously had the Chorus Teams bot integration enabled, it will be automatically disabled when you enable Post-Call Download.

Processing Time and Expectations

Microsoft Teams Post-Call Download processes recordings after meeting completion:

- Normal processing time: 30 minutes to 1 hour
- Maximum SLA: 3 hours
- Recordings appear in Chorus after Teams completes its native processing

This processing delay is the trade-off for eliminating bot presence during meetings and improving reliability.

Troubleshooting Microsoft Teams Post-Call Download

Common Issues and Solutions:

403 Forbidden Errors: - Verify the application access policy is properly created using the correct Application ID - Confirm your Microsoft Entra ID app has the necessary API permissions - Allow 15-30 minutes for policy changes to propagate

Authentication Issues: - Ensure you're using a Global Administrator or Teams Administrator account - Try clearing browser cache if authentication window doesn't appear - Verify your Microsoft 365 permissions include Teams administration

Missing Recordings: - Confirm Teams cloud recording was enabled for the meeting - Verify the meeting included external participants (required for Chorus recording criteria) - Check that meeting organizer had recording permissions - Allow full processing time before escalating (up to 3 hours)

Integration Status Issues: - Check Settings > Integrations for "disconnected" status - Re-authenticate using the Connect button if needed - Verify organizational-level permissions remain intact

Choosing Between Bot Method and Post-Call Download

Consider the following factors when choosing your Microsoft Teams integration method:

Choose Microsoft Teams Post-Call Download when: - Bot presence creates professional concerns with external customers - You experience frequent bot admission failures - Meeting participants are



sensitive to explaining notetaker bot presence - You prioritize meeting environment professionalism over immediate recording access

Choose Traditional Bot Method when: - You need immediate access to recordings during or right after meetings - Real-time conversation intelligence is critical for your workflow - Processing delays are not acceptable for your business needs - You don't experience significant bot admission reliability issues

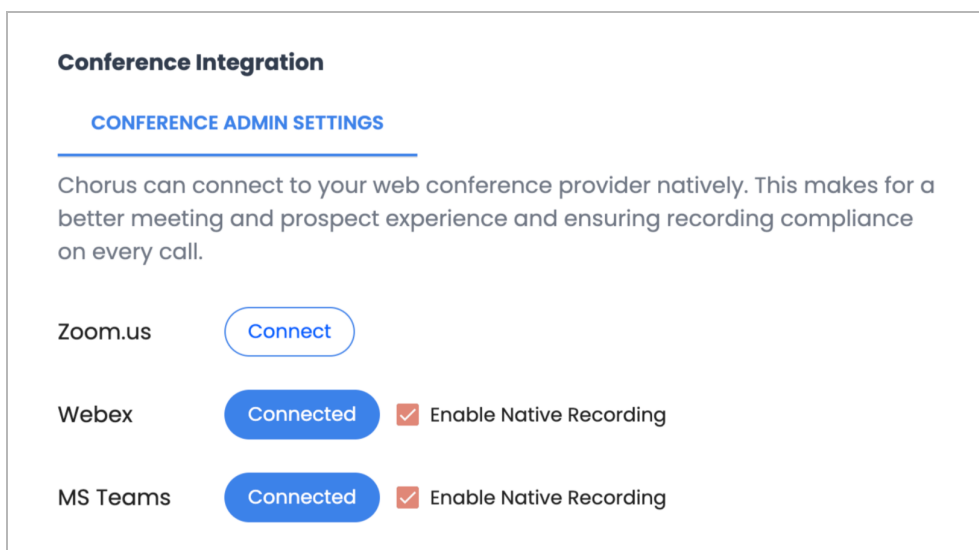
Other Conferencing Platforms

For other supported platforms (Zoom and Webex):

1. Navigate to **Settings > Integrations > Conference Integration**

Note: If using Zoom, ensure your Zoom admin pre-approved the Chorus installation.

2. **Click the Connect button** to connect Chorus integration.
3. Once authentication is complete, Post Call Downloads will be available for your account.



Notes:

- Ensure that cloud recording is enabled for your web conference provider.
- Ensure that audio transcripts are enabled for your web conference provider.
- Once Zoom completes processing, Chorus will begin the ingestion process and notify you when the recording is ready.
- If meeting import is enabled, the Chorus App for Zoom will be unavailable for use.
- Basic Zoom license holders cannot use Chorus's Post Call Download feature because of restrictions in Zoom's cloud recording.



Integrate with Conferencing and Work Productivity Tools

Chorus joins your screen share meetings automatically once your calendar is synced. Chorus will scan your calendar and look for business meetings that have a screen share link plus an attendee that has a different email domain from the email you are using.



General Web Conferencing Integration

Chorus connects with over a dozen web conferencing and screen share providers. Once your calendar is synced, Chorus will automatically scan it for business meetings that contain a screen share link, as well as for any attendees that have a different email domain than you. Chorus will then join your meetings as a Notetaker with no additional setup or integration required on your part.

Currently supported web conferencing and screen share providers include:

3CLogic	Google Meet
8x8	HighFive
Amazon Chime	Join.me
Avaya	Microsoft Teams
BlueJeans	RingCentral Meetings
Cisco WebEx (may require customization)	RingCentral Video
Clearslide	Dialpad Meetings (formerly UberConference)
Demodesk	Vonage
Dialpad	Zoom
Go-To-Meeting	

Zoom Considerations

If you currently use Zoom, follow the steps found in [How to Integrate Zoom With Chorus](#). Integration will streamline compliance and improve your video and audio quality. Without this integration, Chorus will join your meetings as an additional participant.

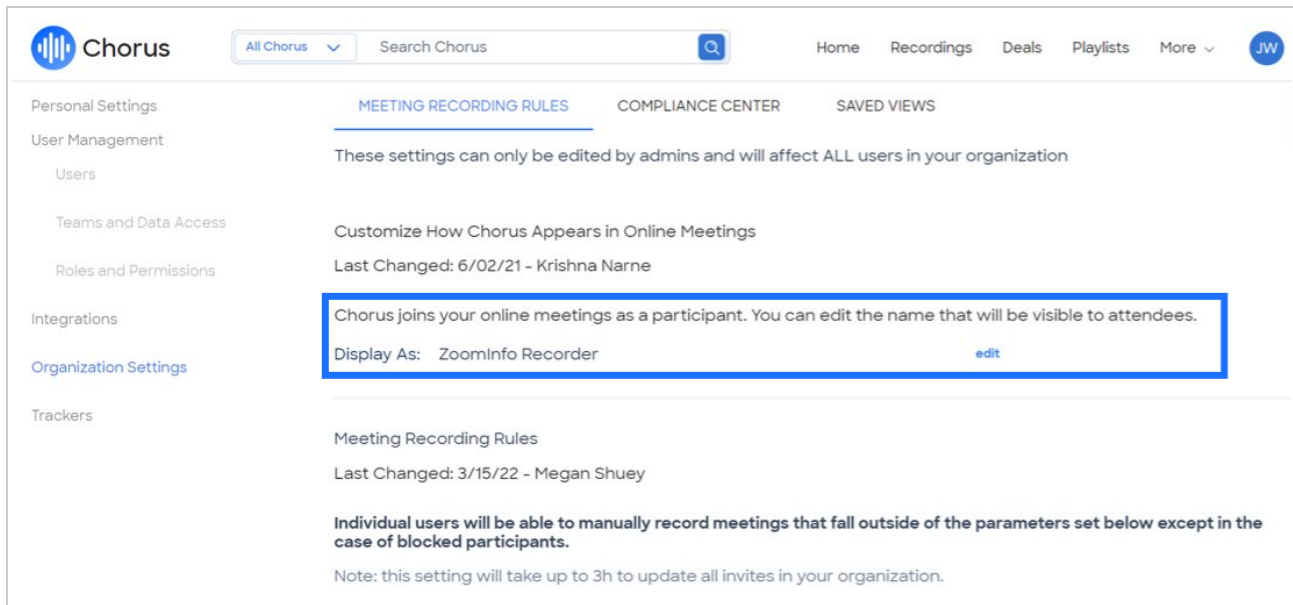
If you have additional questions, please contact chorussupport@zoominfo.com.

Rename the Chorus Notetaker

To rename the Chorus Notetaker:

1. Navigate to the **Organization Settings** tab.
2. Under **Meeting Recording Rules**, click **Edit** to the right of the **Display As** option.
3. Update the Notetaker name.





Note: Not all conferencing platforms support the renaming of the Chorus Notetaker, and the **Display As** custom renaming is not supported for Google Meet.

Native Zoom Integration

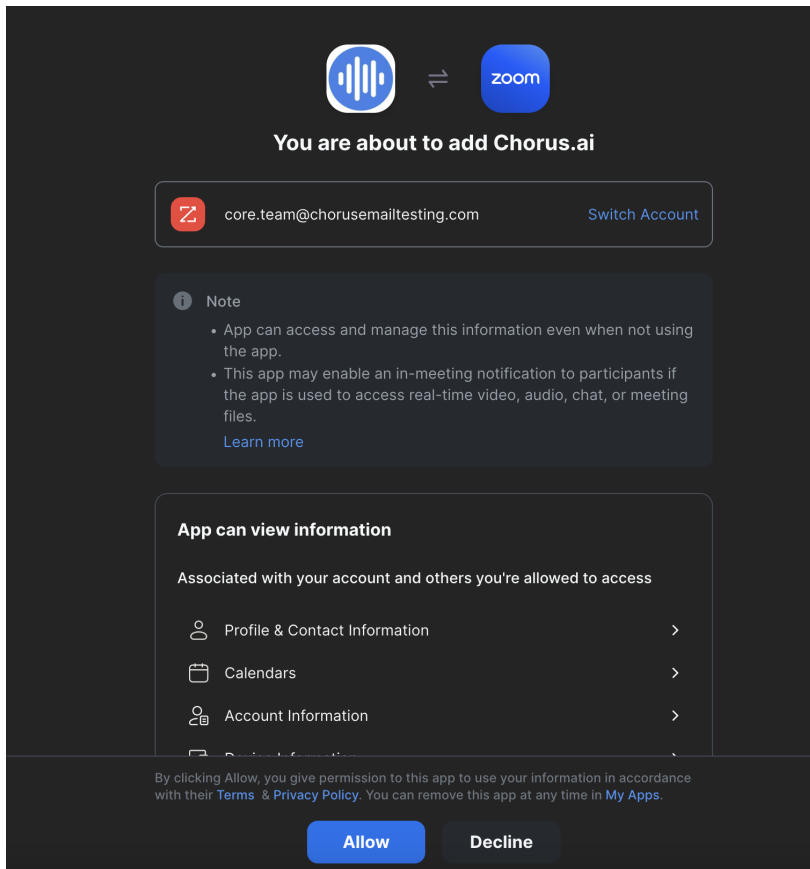
Prerequisites: You must have Chorus admin permissions and Zoom Owner permissions.

Integrate Zoom with Chorus (admin):

1. In your Zoom Account, ensure **Cloud recording** is turned **ON** for your entire organization. Save this setting for all users.
 - a. Chorus will use the native Zoom recording interface, which means your recordings will be stored both in Zoom and Chorus.
 - b. **Important:** It is recommended that you auto-delete Zoom recordings after seven days to make sure your Zoom storage doesn't overflow. Navigate to **Settings** and enable **Delete cloud recordings after a specified number of days**.
2. Ensure **Multiple notifications for phone users** is **ON**.
3. Enable the recording disclaimer to capture explicit consent (required for GDPR).
4. Ensure **Custom Live Streaming Service** from the options menu is **ON**. Navigate to the **Meeting** tab > **Advanced** > **Allow live streaming of meetings**.

Note: You do not need to enter anything in the text box below the **Custom Live Streaming Service** option once enabled.

5. From the [Zoom Marketplace](#) search for **Chorus.ai**.
6. Toggle on **Approve app** and select the users who will be allowed to use the app then click **Save**.



7. Click **Allow**. You will be redirected to Chorus Integrations settings. Follow the steps in Chorus under **Native Zoom Integration**.

Native Zoom Integration

Chorus can connect to your Zoom meetings natively within the Zoom interface. This makes for a better meeting and prospect experience and ensuring recording compliance on every call.

Setup Instructions

Ensure your Zoom admin pre-approves the Chorus installation. This guide will help.

Activate the Chorus Zoom Integration: [Activate](#)

Copy reactivation link to share with Zoom Admin:



Verify Streaming is activated. Please add an internal Zoom link to check:

CHECK

☒ Enable Streaming

☐ Enable Zoom Post Call download

You need to reinstall the app to enable this feature.

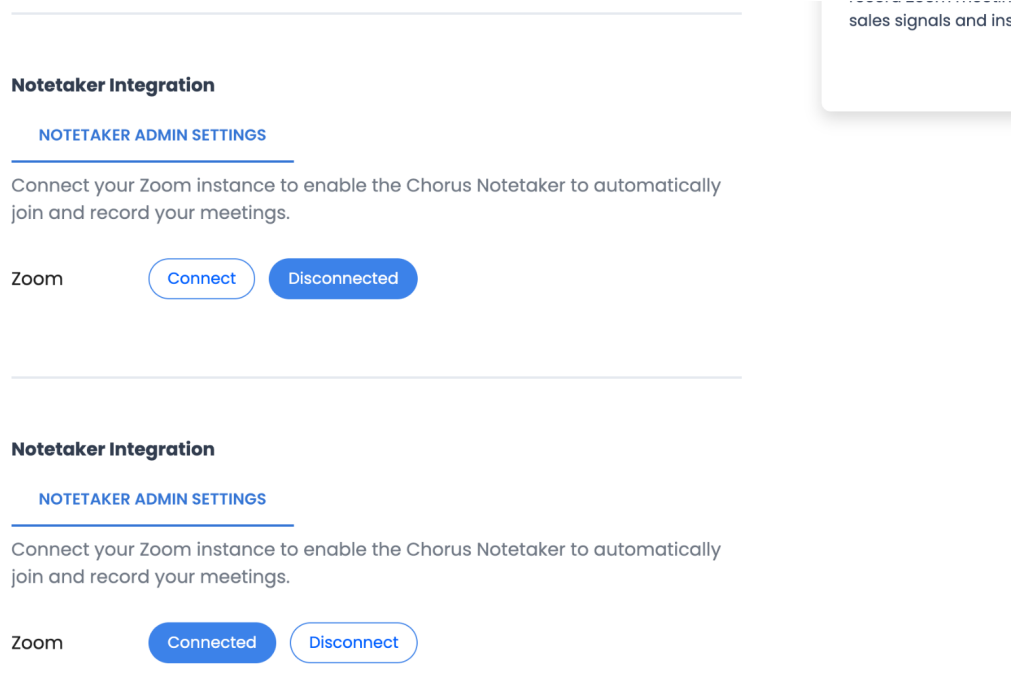
Information about [Managing user groups and settings](#) can be found within Zoom documentation.

Zoom Notetaker Integration

Prerequisites: You must have Chorus admin permissions and Zoom Owner permissions.

Integrate Zoom with Chorus (admin):

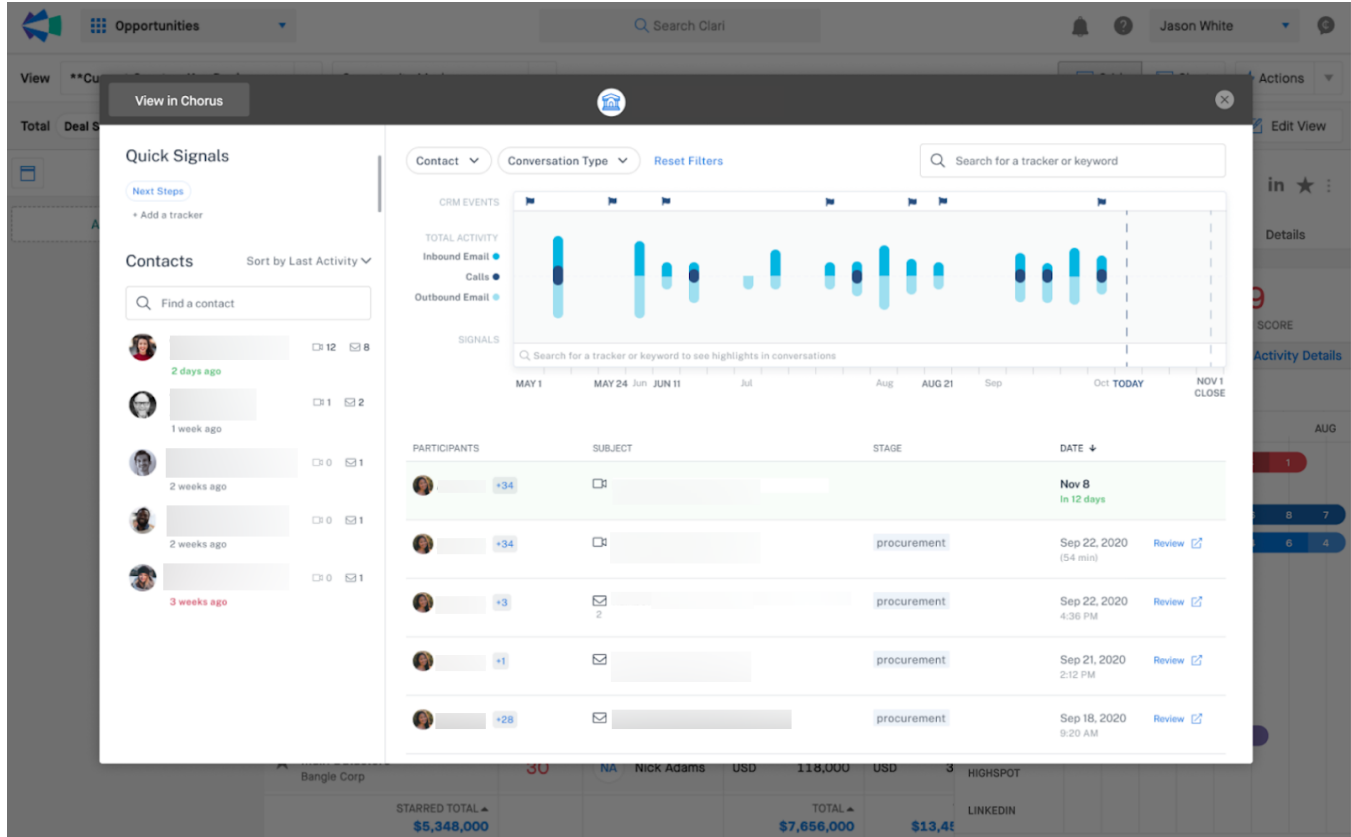
1. In your Chorus Account, Go to Settings > Integration to the following settings and try connecting.



2. Login using your admin zoom account once prompted and allow the integration.
3. To use the integration, allow customer_settings "recording_method_allow_cloud" and create a zoom meeting.
4. You can also use the **Disconnect** button to remove the Zoom integration from Chorus. This will stop Chorus from joining future Zoom meetings but will not affect any existing recordings already processed in Chorus.

Clari Integration

Chorus and Clari have joined forces to bring first-hand conversation and revenue insights from Chorus directly into the Clari platform. Within Clari Deal and Account views you are able to access Momentum by Chorus.



The integration is toggled on in Clari and will require users to log in to their Chorus instance to use it. To get started with the Clari integration, contact chorussupport@zoominfo.com to obtain the Chorus Client ID and Secret required for the connection. Once you have these credentials, your Clari Customer Success team will activate the integration on the Clari side. For Clari support, contact support@clari.com.

Gainsight Integration

The integration with Gainsight allows you to automatically create activity on the Gainsight Timeline from your Chorus online meetings and calls. This gives you a centralized view of your customer data. With the Gainsight integration, you can automatically create new activity from Chorus calls and online meetings with the following data:

- Engagement title
- Meeting recording link

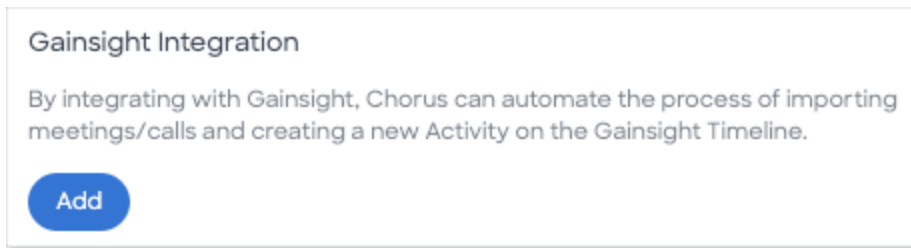
- External and internal attendees
- Trackers
- Duration
- Embedded video player with meeting recording
- Meeting summary and action items (Chorus Enterprise package only)

Before you begin: You must have a working Salesforce connection with Gainsight to implement Gainsight.

Important: Chorus calls need to be matched to a CRM Account (SFDC) and the matching Gainsight account in order for Chorus to create the Gainsight task/object. The account the recording is associated with must exist in both SFDC and Gainsight prior to the call being made.

To configure the integration between Chorus and Gainsight:

1. Log in to Chorus and navigate to the **Integrations** page.
2. Scroll to the **Gainsight Integration** section and click **Add**.



3. Enter your **Access Key** and **Domain Name**.

Note: The “Domain Name” is the leading part of the full domain.

Example, if the Gainsight URL is <https://NAME.gainsightcloud.com/> you will only need to use NAME for the Domain Name value.

The Access Key is provided by Gainsight.

For details see Gainsight public documentation with instructions how to [Generate REST API Key](#).

In Gainsight: Find the Access Key through **Cogwheel > Integrations > Connectors 2.0**.



A screenshot of a web application showing a modal window titled "Gainsight Integration". The modal has two input fields: "Access Key" with a red asterisk and "Domain Name". Below the inputs are two buttons: "Cancel" and "Submit". The background is a blurred view of the main application interface, which includes sections for "Zoom P", "Chorus", and "Custom".

Activate the Chorus Zoom Integration: Activate

Verify S

Enter Z

☒ Ena

Update

Zoom P

Chorus

Custom

Add an e

Edit B

Gainsig

By integrating with Gainsight, Chorus can automate the process of importing meetings/calls and creating a new Activity on the Gainsight Timeline.

Edit

4. Fill out connection details and click **Submit**.

Zapier Integration

Organizations with the Chorus Enterprise package can integrate with Zapier. API access is included with the Enterprise package at no additional cost, no separate API purchase is required.

Zapier is an online automation tool that connects various web applications and enables them to work together seamlessly. This allows users to create automated workflows, known as "Zaps," without the need for coding or technical expertise.

Creating a Zap for Chorus allows you to:

- Improve information flow between Chorus and non-integrated software using a no-code Zap from Zapier.
- Trigger actions in non-integrated software based on post-meeting briefs.

The screenshot shows the Zapier 'Visual Editor' interface. On the left, a Zap named 'TEST ZAP 3 chorus 2.0.1' is shown with two steps: a trigger '1. Test Zap for New Recording 2 Trigger from Chorus by ZoomInfo Version 2.0.1' and an action '2. Append Text to Document in Google Docs'. On the right, the configuration for the second step is detailed. It includes a 'Folder' dropdown set to 'root', a 'Document Name' field with 'TEST ZAP 3', and a 'Text to Append' field containing a JSON-like structure with meeting details: Meeting ID, URL, Email, Owner Email, Participant Emails, Meeting Summary, and Action Items. A 'Continue' button is visible at the bottom right of the configuration panel.

1. Go to **Zapier.com** and create a new account or log in.
2. Click on **Create a Zap**.
3. Click **Trigger** then search for **Chorus by Zoominfo** app.
More details will be displayed about the Chorus app.
4. Click **Continue**.
5. Click **Sign into Chorus**.
6. You will be prompted to enter a Chorus API token. You can generate this from **Personal Settings** inside Chorus the platform.
7. Enter the API token and click **Yes > Continue**.
8. Start building your Zap.

We enhanced our Chorus integration with **Zapier** allowing you to add **Post-Meeting Briefs** and **Action Items** when building a new Zap for Chorus.

You will see the fields that have been added for **Meeting Summary** and **Action Items**.

Notes:

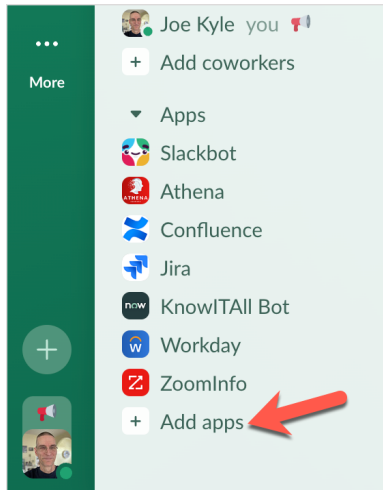
- This feature is for Enterprise customers only and requires API.
- Chorus cannot generate a Meeting Summary or Action Items for meetings less than 10 minutes.



Slack Integration

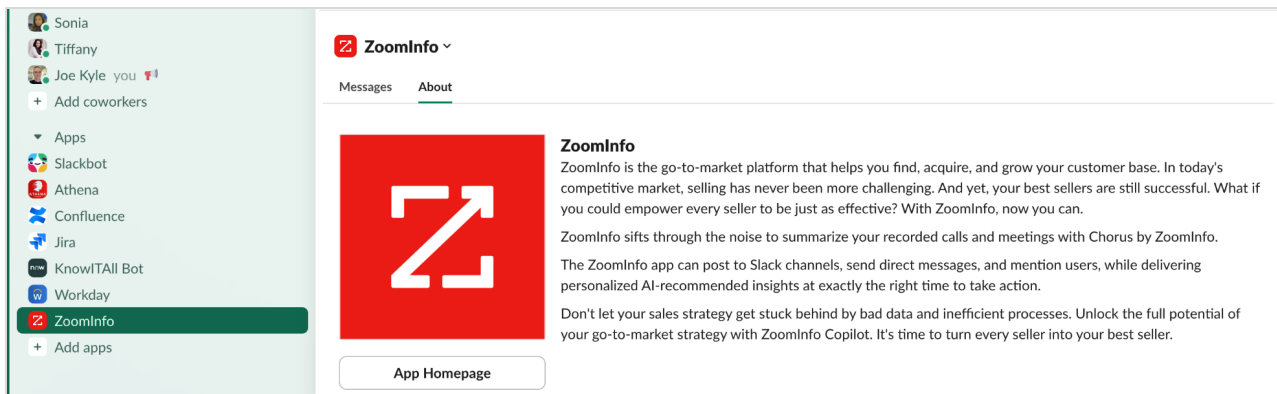
To add the ZoomInfo Slack app to Slack:

1. In Slack, expand the **Apps** menu.
2. Click **+ Add apps**.



3. Search for **ZoomInfo**.
4. Click the **ZoomInfo** icon to add the app to Slack.

The app is added to your **Apps** section in your Slack menu.



Notes:

- Organizations need to have the Chorus Enterprise package for this feature to work.
- Additional information about the ZoomInfo integration for Slack can be found [here](#).

Post-Meeting Briefs in Slack

Post-meeting briefs give you a summary of meetings along with any correlating action items derived from generative AI.

If you use Slack and you've enabled the ZoomInfo Slack app, you can receive post-meeting briefs in your Slack feed.

Add Post-Meeting Summaries in Slack Channels

You can now receive Post-Meeting Summaries for specific Chorus accounts in their associated Slack channels.

By using Slack commands (e.g `/chorus-track-account`) within a designated Slack channel you can track a specific account or opportunity. This will be applicable only to the Slack channel where the command is used.

Note: This feature only works with Slack channels, not with Slack direct messages.

In your Slack channel, you can type `/chorus` or `/chorus help` and the ZoomInfo app will display the following options:

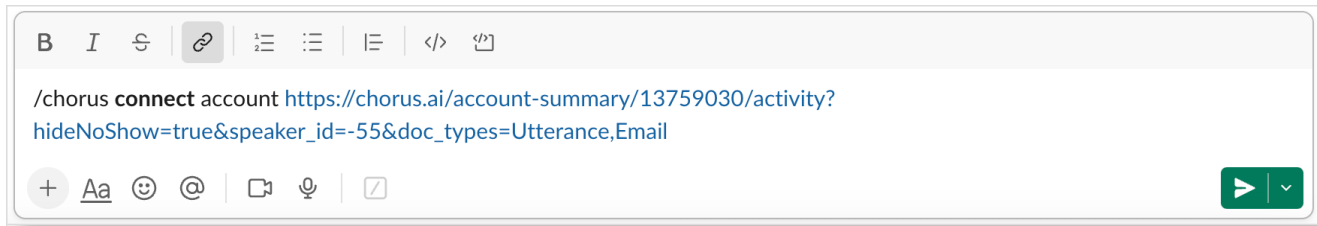
- `/chorus connect account link_to_account`: This command connects an account in Chorus to your Slack channel where *link_to_account* is a link to the account in Chorus.
- `/chorus connect opportunity link_to_opp`: This command connects an opportunity in Chorus to your Slack channel where *link_to_opp* is a link to the account in Chorus.
- `/chorus disconnect all`: This command disconnects all accounts and opportunities from this Slack channel.
- `/chorus show all` Slack will show a list of all connected accounts and opportunities in the Slack channel where the command is used. Command line results will be as follows:
 - Command not found
 - No Slack integration
 - Bad URL
 - Successfully connected opportunities/accounts
 - Already connected
 - Show my connected accounts/opps
 - Disconnect all the accounts and opportunities

How it works:

1. In Slack, click into the Slack channel where you want to receive Post-Meeting Summaries.
2. In the message box at the bottom of that channel type any of the command lines above.
3. From Chorus, copy the account or opportunity URL and paste it as part of the command line *link_to_account* or *link_to_opp* section.



Example:

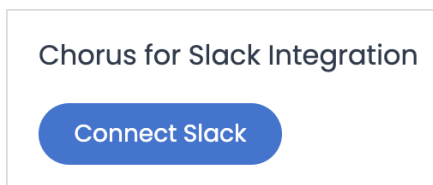


After each meeting involving the tracked account, Chorus will send meeting summaries and action items to the Slack channel where the command was used.

Note: You may receive an error message when attempting to use the Slack commands. If so, reconnect your integration to Slack.

Connect Chorus to Slack:

1. In Chorus, navigate to **Settings > Personal Settings**.
2. Scroll to **Chorus for Slack Integration**, click **Connect Slack**.

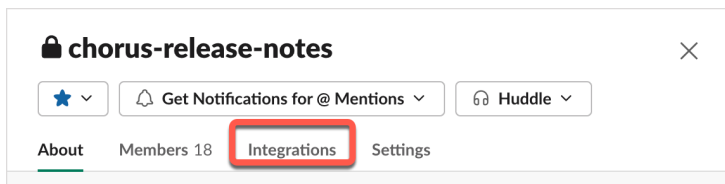


Private Slack channels:

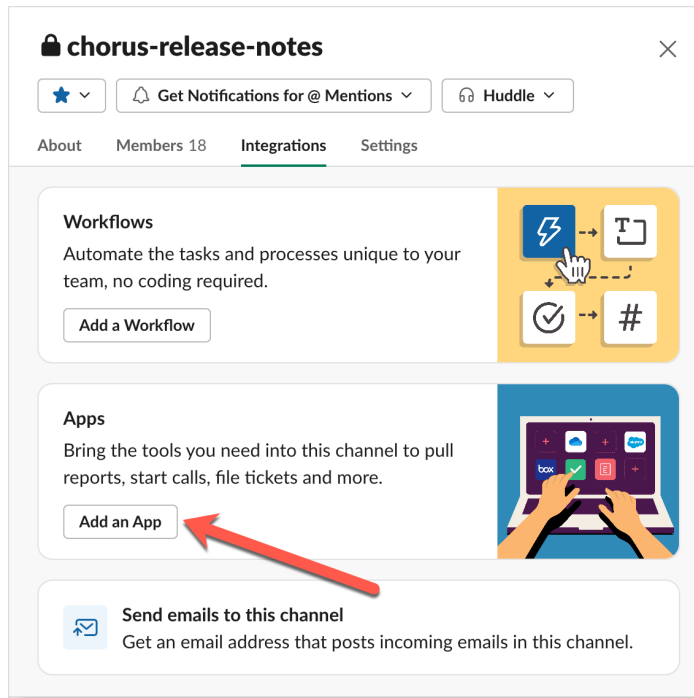
To use this feature with private Slack channels, add the **Chorus.ai app**.

How it works:

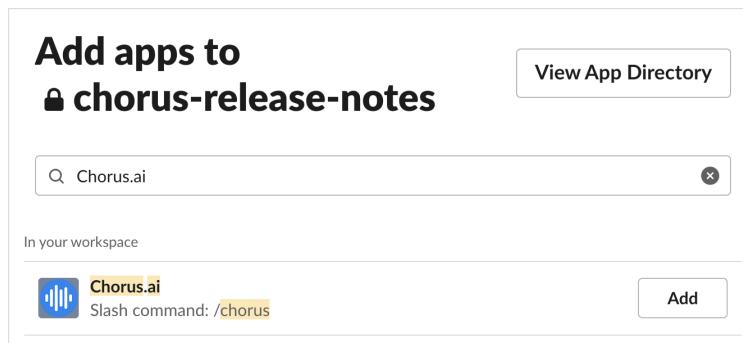
1. In the private channel, click the channel name then click **Integrations**.



2. Click **Add an App**.



3. Search for **Chorus.ai** and click **Add**.



Alternatively you can add Chorus to a private channel by using the message field and mentioning **@Chorus.ai**. Slack will ask you to add Chorus to the channel.

Dialer Integration

Chorus integrates with most popular dialer options. Once synced, Chorus provides features like automatic transcription, theme detection, commenting, and more.

Syncing allows Chorus to import your team's conversations through each dialer. Once initial integration is complete, Chorus will load the last seven days of calls from the dialer into Chorus. It will then upload and analyze calls on an hourly basis.

Note: To integrate Chorus with most dialers, you must be connected to Salesforce, HubSpot or Microsoft Dynamics. Exceptions include the following dialers: ZoomInfo Engage, Zoom Phone, or Shoretel Sky/Mitel. For all other dialers, ensure your CRM has already been connected to Chorus.

To configure a dialer:

1. Select **Settings > Integrations > Dialer Integrations > Add a New Dialer**.
2. Select the dialer that you want to connect.
3. Locate your dialer in the following table to view the additional actions needed to integrate.

Dialer Name	Directions
3CLogic	Input your 3CLogic Username and Password and select the Salesforce API field name your organization uses for your call outcome (e.g. Call_Recording__c)
8x8	Input your 8x8 Username and Password and select the Salesforce API field name your organization uses for your call outcome (e.g. Call_Recording__c)
Aircall - Hubspot	Input your Aircall API Key and Auth Secret Key. Not sure? Ask your Aircall rep.
Amazon Connect	Input your AmazonConnect Auth Key and Auth Secret Key (not sure? Ask your AmazonConnect rep) and select the Salesforce API field name your organization uses for your call outcome (e.g. Call_Recording__c)
Apollo	Select the Salesforce API field name your organization uses for your call outcome (e.g. Call_Recording__c)
CloudTalk	Select the Salesforce API field name your organization uses for your call outcome (e.g. Call_Recording__c)
ConnectAndSell	Select the Salesforce API field name your organization uses for your call outcome (e.g. Call_Recording__c)
Koncert (formerly ConnectLeader)	Select the Salesforce API field name your organization uses for your call outcome (e.g. Call_Recording__c)
Conquer (formerly DialSource)	Select the Salesforce API field name your organization uses for your call outcome (e.g. Call_Recording__c)
DialPad	Select the Salesforce API field name your organization uses for your call outcome (e.g. Call_Recording__c)
Engage Dialer	See this section for Engage Dialer integration
Five9	Input your Five9 Auth Key, Auth Secret Key, and S3 Bucket Link (not sure? Ask your Five9 rep) and select the Salesforce API field name your organization uses for your call outcome (e.g. Call_Recording__c)



Dialer Name	Directions
FrontSpin	Select the Salesforce API field name your organization uses for your call outcome (e.g. Call_Recording__c)
Fuze	Select the Salesforce API field name your organization uses for your call outcome (e.g. Call_Recording__c)
Generic S3 Dialer	Select the Salesforce API field name your organization uses for your call outcome (e.g. Call_Recording__c)
Genesys Pureconnect	Input your Genesys log in credentials and select the Salesforce API field name your organization uses for your call outcome (e.g. Call_Recording__c)
Groove	Select the Salesforce API field name your organization uses for your call outcome (e.g. Call_Recording__c)
Hubspot Dialer	Leave the "Call Disposition" field blank. See important set-up instructions in the HubSpot Dialer Integration section.
InsideSales.com (XANT)	Input your InsideSales Auth Key, Auth Secret Key, and S3 Bucket Link (not sure? Ask your InsideSales rep) and select the Salesforce API field name your call outcome (e.g. Call_Recording__c)
InsideSales Playbook (XANT Playbook)	Input your InsideSales Playbook API Key (not sure? Ask your InsideSales Playbook rep) and select the Salesforce API field name your organization uses for your call outcome (e.g. Call_Recording__c)
MixMax Dialer	Select the Salesforce API field name your organization uses for your call outcome (e.g. Call_Recording__c)
NewVoice Media	Input your NewVoiceMedia Username, Password, and Region and select the Salesforce API field name your organization uses for your call outcome (e.g. Call_Recording__c)
Orum	Select the Salesforce API field name your organization uses for your call outcome (e.g. Call_Recording__c)
Outreach	Select the Salesforce API field name your organization uses for your call outcome (e.g. Call_Recording__c)
PhoneBurner	Select the Salesforce API field name your organization uses for your call outcome (e.g. Call_Recording__c)
RingCentral	Select the Salesforce API field name your organization uses for your call outcome (e.g. Call_Recording__c)



Dialer Name	Directions
Salesforce Lightning Dialer	Select the Salesforce API field name your organization uses for your call outcome (e.g. Call_Recording__c)
SalesLoft	Select the Salesforce API field name your organization uses for your call outcome (e.g. Call_Recording__c)
Shoretel	Input your Shoretel Username and Password and select the Salesforce API field name your organization uses for your call outcome (e.g. Call_Recording__c)
Talkdesk	Input your Talkdesk Username and Password and select the Salesforce API field name your organization uses for your call outcome (e.g. Call_Recording__c)
Truly	Input your Truly Auth ID and Auth Secret Key (not sure? Ask your Truly rep) and select the Salesforce API field name your organization uses for your call outcome (e.g. Call_Recording__c)
RingCentral for HubSpot	Select the HubSpot API field name your organization uses for your call outcome (e.g. Call_Recording__c)
RingDNA S3	Select the Salesforce API field name your organization uses for your call outcome (e.g. Call_Recording__c)
Zendesk Talk	Input your Username, Password and Domain
Zoom Phone	See this section for Zoom Phone integration

4. Click **Sync Dialer** to complete the process.
5. Once connected, Chorus will import your dialer calls from the Call Recording URL located on the Call Task.

HubSpot Dialer Integration with Chorus

To use the HubSpot Dialer, admins must complete two steps: first, connect the HubSpot CRM to the ZoomInfo platform through the ZoomInfo Admin Portal, then enable the HubSpot Dialer integration through Chorus.

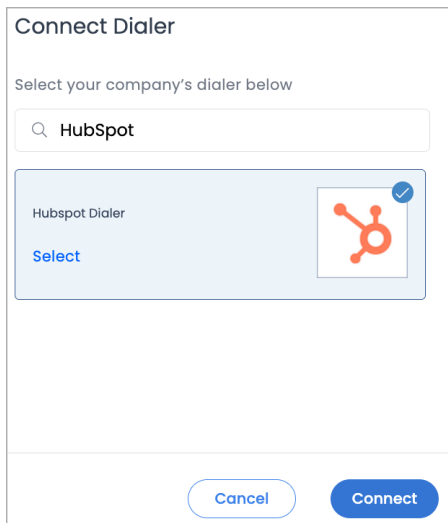
ZoomInfo Platform: To connect the HubSpot CRM with ZoomInfo, admins should refer to the [ZoomInfo HubSpot Integration Guide](#) and follow the instructions in the "Get Connected" section on page 7.

Chorus: Once the HubSpot CRM has been connected to the ZoomInfo platform, admins can then connect the HubSpot Dialer from within Chorus by following these steps:

1. In Chorus, select **Settings > Integrations > Dialer Integrations > Add a New Dialer**.



2. Type **"HubSpot"** in the Connect Dialer search box.

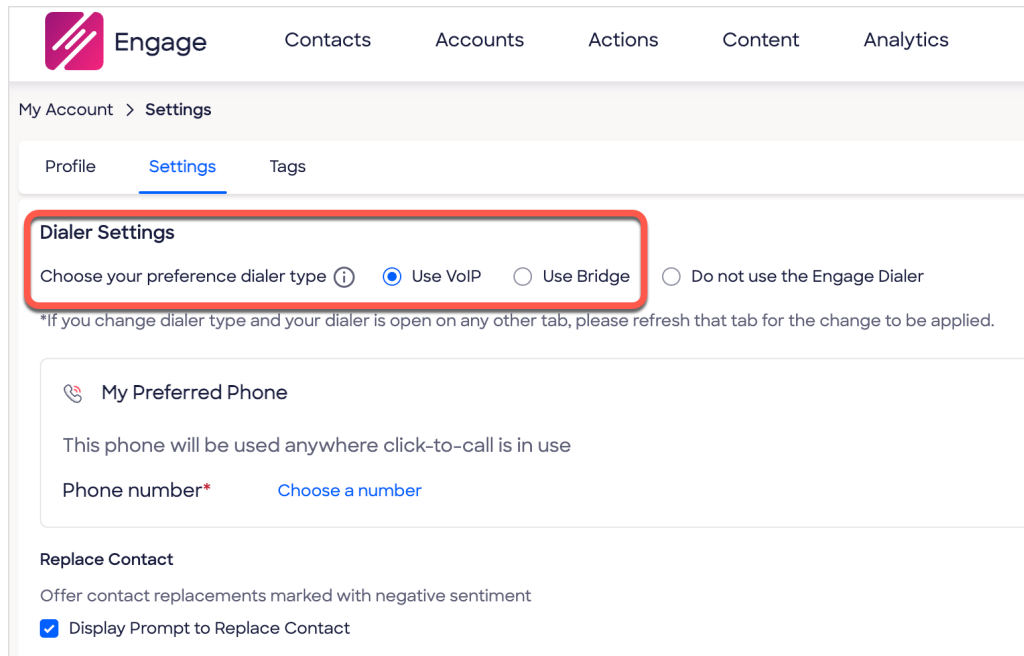


3. Click **Select**.
4. Click **Connect**.

Engage Dialer integration with Chorus

To integrate the ZoomInfo Engage Dialer with Chorus follow these steps:

1. In Engage, each user must connect to the Engage Dialer by navigating to **My Account > Settings > Dialer Settings**.
2. Choose to **Use VoIP** or **Use Bridge**.
3. Follow the prompts to complete the Engage Dialer setup.



The screenshot shows the 'My Account > Settings' page in the Engage interface. The 'Settings' tab is selected. A red box highlights the 'Dialer Settings' section. Below this, there are three radio button options: 'Use VoIP' (selected), 'Use Bridge', and 'Do not use the Engage Dialer'. A note states: '*If you change dialer type and your dialer is open on any other tab, please refresh that tab for the change to be applied.' Below this is a section for 'My Preferred Phone' with a text input for 'Phone number*' and a 'Choose a number' link. At the bottom, there is a 'Replace Contact' section with a checkbox 'Display Prompt to Replace Contact' which is checked.

My Account > Settings

Profile Settings Tags

Dialer Settings

Choose your preference dialer type ⓘ ☒ Use VoIP ☐ Use Bridge ☐ Do not use the Engage Dialer

*If you change dialer type and your dialer is open on any other tab, please refresh that tab for the change to be applied.

 My Preferred Phone

This phone will be used anywhere click-to-call is in use

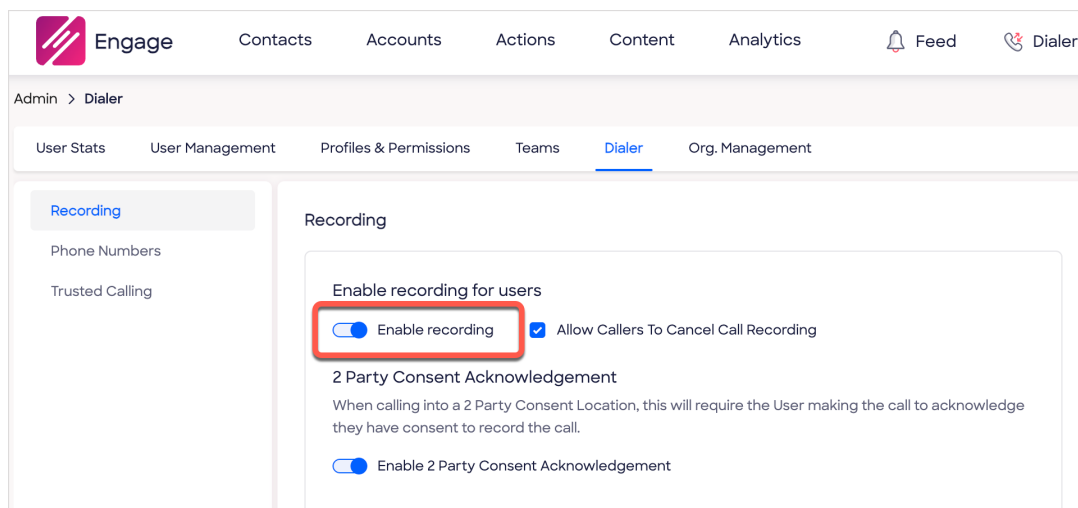
Phone number* [Choose a number](#)

Replace Contact

Offer contact replacements marked with negative sentiment

☒ Display Prompt to Replace Contact

- The Engage Admin must ensure that **Enable Recording** is toggled on in Engage. **Admin > Dialer > Enable Recording**.



The screenshot shows the 'Admin > Dialer' page in the Engage interface. The 'Dialer' tab is selected. On the left sidebar, 'Recording' is highlighted. The main content area is titled 'Recording' and contains two sections. The first section, 'Enable recording for users', has a red box around the 'Enable recording' toggle switch, which is turned on. Next to it is a checked checkbox for 'Allow Callers To Cancel Call Recording'. The second section, '2 Party Consent Acknowledgement', has a text description and a toggle switch for 'Enable 2 Party Consent Acknowledgement' which is also turned on.

Engage Contacts Accounts Actions Content Analytics Feed Dialer

Admin > Dialer

User Stats User Management Profiles & Permissions Teams **Dialer** Org. Management

Recording

Phone Numbers

Trusted Calling

Recording

Enable recording for users

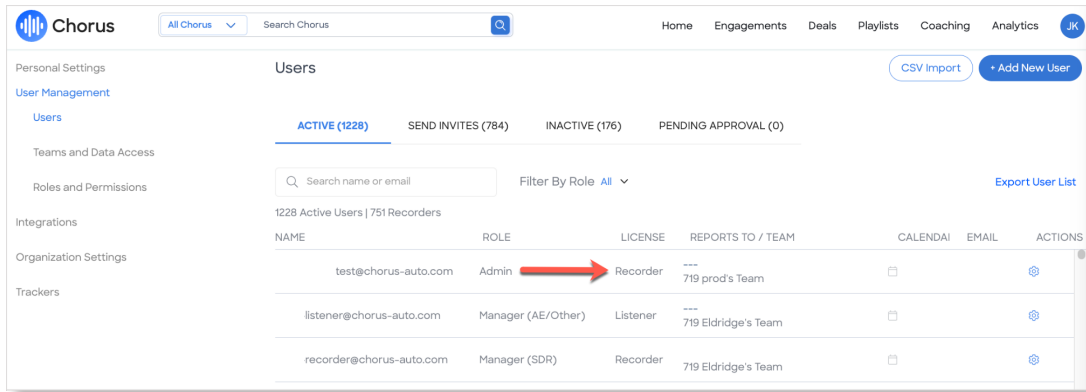
☒ Enable recording ☒ Allow Callers To Cancel Call Recording

2 Party Consent Acknowledgement

When calling into a 2 Party Consent Location, this will require the User making the call to acknowledge they have consent to record the call.

☒ Enable 2 Party Consent Acknowledgement

- In Chorus, the Chorus Admin must ensure that users have a **Recorder License**.



With these steps in place Chorus will ingest calls recorded by the Engage Dialer. For additional assistance, contact your ZoomInfo CSM or open a ticket directly with chorussupport@zoominfo.com.

Zoom Phone integration with Chorus

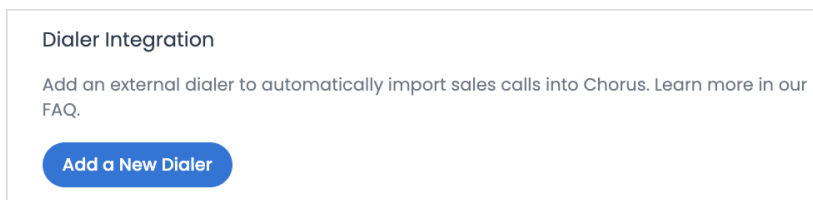
Prerequisites:

- The Zoom phone API requires a Business or Enterprise Zoom account. If you do not have a Business or Enterprise account, Chorus will be unable to pull in calls.
- You need to be an administrator in both Zoom and Chorus to complete this integration.
- This integration is for Salesforce only no other CRMs are supported at this time.

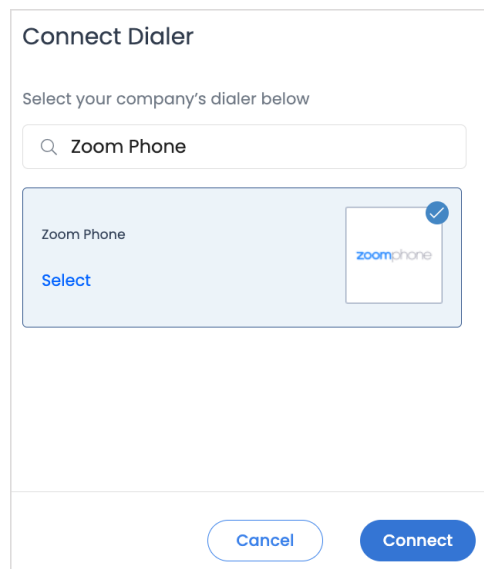
Integrate Zoom Phone with Chorus with these steps:

In Chorus:

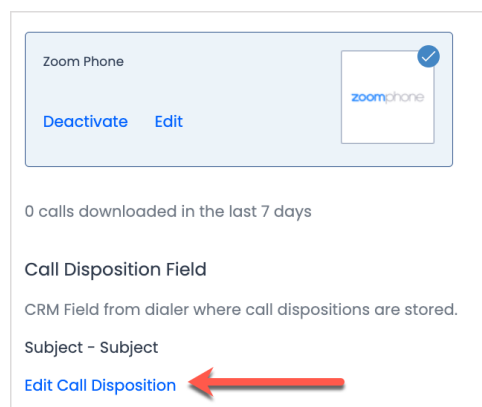
1. Navigate to **Settings > Integrations** then scroll to and click **Add a New Dialer**.



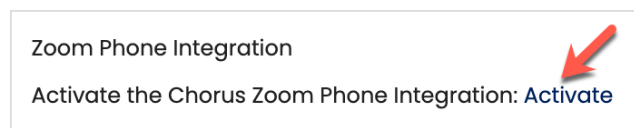
2. Search for **Zoom Phone** in the Connect Dialer search box.
3. Click **Select** for Zoom Phone.
4. Click **Connect**.



5. For Salesforce, under **Call Disposition Field** click **Edit Call Disposition** and select the Salesforce API field name your organization uses to log your call outcome (e.g. Call_Recording__c). If you do not have a field for this, leave this drop down blank.



6. Click **Complete**.
7. While still in Chorus Integrations, scroll to **Zoom Phone Integration** and click **Activate**.



Additional information about Zoom Phone for Chorus can be found in [this Zoom article](#).

In Zoom:

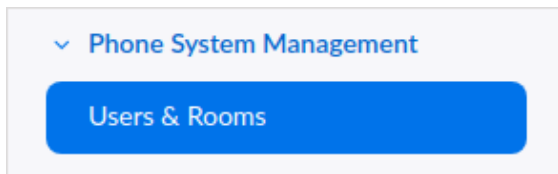
The steps in this guide will affect the Zoom settings for your entire organization. However, if you choose to have group-specific settings, see the following documentation for how to set-up groups within Zoom: [Managing User Groups](#)

Prerequisites:

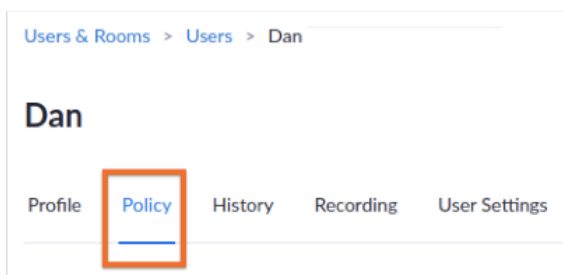
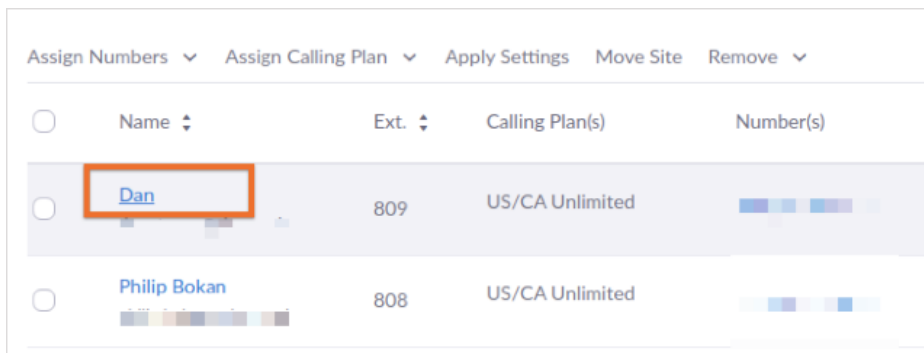
- Your organization must use Salesforce and have already set up the 1-click Chorus-Salesforce sync.
- Your organization must be on a Business or Enterprise account with a Zoom Phone plan (Metered, Unlimited, or Pro).
- Ensure the Zoom admin also has a Chorus.ai admin license. The integration requires that the person doing the set up has the proper credentials for both Zoom and Chorus.

How it works (admins)

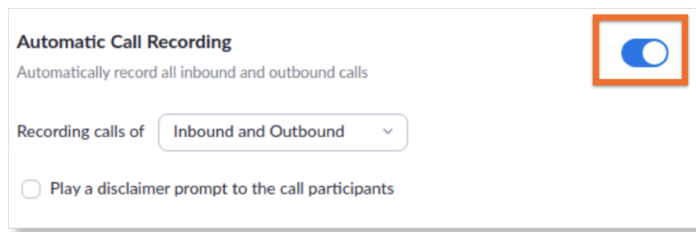
1. Zoom Phone must be enabled for each user individually within your organization.
2. Navigate to the **Phone System Management** section in your Zoom settings and select **Users & Rooms**. (Note: The Users & Rooms section is separate from other user management sections within the Zoom settings).



3. Click into each user who will be using Zoom Phone, then click the **Policy** tab.

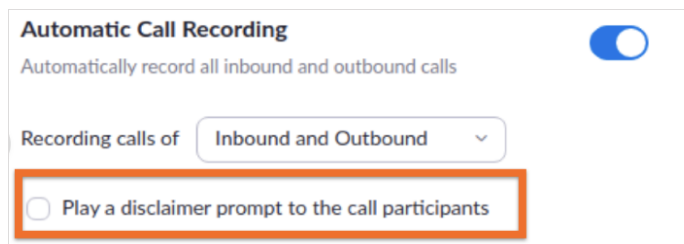


4. On the Policy tab for each user, enable **Automatic Call Recording for Inbound and Outbound calls**. Doing this will allow all inbound and outbound calls to be recorded by Zoom and be uploaded by Chorus.



5. Once enabled, the Play a disclaimer prompt to the call participants will trigger an audio notification to play at the start of both inbound and outbound calls letting participants know the call is being recorded.

Recommended: This setting can be disabled by unchecking the box.



Configure SSO for Chorus

This section describes how to configure Single Sign-On (SSO) for Chorus. Contact chorussupport@zoominfo.com if you need additional assistance in setting up this configuration for your organization.

Requirements

Before you configure provisioning you must reach out to chorussupport@zoominfo.com to activate the feature.

Configure Okta for Chorus

1. Contact chorussupport@zoominfo.com to request API access for Okta integration. They will provide an API token specific to your organization.
2. In Okta, check **Enable provisioning features**.
3. Click **Configure API Integration**.
4. Check **Enable API integration**.
5. Enter the API Token provided by Chorus Support.



6. Click **Test API Credentials**. (A verification message should appear at the top of the screen.)
7. Click **Save**.
8. Select **To App** in the left panel, then choose the Provisioning Features you want to enable.
9. Click **Save**.

You can now assign users to the app and complete the application setup. When assigning users or groups, app attributes must be selected for **Chorus Role** and **Chorus License Type**.

This section describes how to set these attributes.

Configuring Role, License type, and Manager

1. Click the **Provisioning** tab.
2. Scroll to **Chorus App Mappings** and click **Go to Profile Editor**.
3. Click **Add Attribute**.

The screenshot shows the Okta Provisioning configuration page for the Chorus app. The left sidebar has tabs for Settings, To App, To Okta, and Integration. The main content area is titled 'Provisioning to App' and includes a warning message: 'One or more required attributes are not mapped. To prevent provisioning failures, scroll down to Chorus - Development -SAML & SCIM Attribute Mappings and set mappings for the attributes that are marked with a warning icon.' Below the warning, there is a diagram showing 'Okta' connected to 'CHORUS DEVELOPMENT'. The configuration options are as follows:

- Create Users**: ☐ Enable. Description: Creates or links a user in Chorus - Development -SAML & when assigning the app to a user in Okta. The [default username](#) used to create accounts is set to **Email**.
- Update User Attributes**: ☐ Enable. Description: Okta updates a user's attributes in Chorus - Development -SAML & SCIM when the app is assigned. Future attribute changes made to the Okta user profile will automatically overwrite the corresponding attribute value in Chorus - Development -SAML & SCIM.
- Deactivate Users**: ☐ Enable. Description: Deactivates a user's Chorus - Development -SAML & account when it is unassigned in Okta or their Okta account is deactivated. Accounts can be reactivated if the app is reassigned to a user in Okta.
- Sync Password**: ☐ Enable. Description: Creates a Chorus - Development -SAML & password for each assigned user and pushes it to SCIM.

For Chorus License Type:



- Data type: "string"
- Display name: "Chorus License Type"
- Variable Name: "chorus_license_type"
- External namespace: "urn:ietf:params:scim:schemas:core:2.0:User"
- Enum: check **Define enumerated list of values**.
- Attributes members:
 - Display name: Recorder, Value: recorder
 - Display name: Listener, Value: listener
- Attribute Required: **Yes**.
- Attribute Type: **Group**.
- Click **Save Attribute**.



Chorus License Type

Data type: string

Display name [?]: Chorus License Type

Variable name [?]: dev348119_chorusdevelopment_1.chorus_license_type

External name: chorus_license_type

External namespace: urn:ietf:params:scim:schemas:core:2.0:User

Description:

Enum: ☒ Define enumerated list of values

Display name	Value	
Recorder	recorder	x
Listener	listener	x

[+ Add Another](#)

Attribute required: ☒ Yes

Attribute type: ☐ Personal ☒ Group

Mutability: READ_WRITE

[Save Attribute](#) [Cancel](#)

For Chorus Role:

- Data type: "string"
- Display name: "Chorus Role"
- Variable Name: "chorus_role"
- External namespace: "urn:ietf:params:scim:schemas:core:2.0:User"
- Enum: check **Define enumerated list of values**.
- Attributes members:
 - Display name: Rep (AE/Other), Value: Rep (AE/Other)
 - Display name: Rep (SDR), Value: Rep (SDR)
 - Display name: Manager (AE/Other), Value: Manager (AE/Other)



- Display name: Manager (SDR), Value: Manager (SDR)
- Display name: Enablement/Leadership, Value: Enablement/Leadership
- Display name: Admin, Value: Admin
- Attribute Required: **Yes**
- Attribute Type: **Group**
- Click **Save Attribute**.

Chorus Role

Data type

string

Display name ⓘ

Chorus Role

Variable name ⓘ

dev348119_chorusdevelopment_1.chorus_role

External name

chorus_role

External namespace

urn:ietf:params:scim:schemas:core:2.0:User

Description

Enum

☒ Define enumerated list of values

Attribute members

Display name	Value	
Rep (AE/Other)	Rep (AE/Other)	x
Rep (SDR)	Rep (SDR)	x
Manager (AE/Other)	Manager (AE/Other)	x
Manager (SDR)	Manager (SDR)	x
Enablement/Leadership	Enablement/Leadership	x
Admin	Admin	x

+ Add Another

Attribute required

☒ Yes

Attribute type

☐ Personal
☒ Group

Mutability

READ_WRITE

Save Attribute

Cancel

Both Chorus Role and Chorus License Type will be populated automatically by the group attributes.

For Manager Email:

- Data type: "string"
- Display name: "Manager Email"
- Variable Name: "manager_email"
- External namespace: "urn:ietf:params:scim:schemas:core:2.0:User"
- Attribute Type: **Personal**
- Click **Save Attribute**.

Manager Email

Data type	string
Display name 	Manager Email
Variable name 	dev348119_chorusdevelopment_1.manager_email
External name	manager_email
External namespace	urn:ietf:params:scim:schemas:core:2.0:User
Description	
Enum	☐ Define enumerated list of values
Attribute required	☐ Yes
Attribute type	☒ Personal ☐ Group
Mutability	READ_WRITE

After creating the Manager Email attribute, add a mapping:

1. Go back to the **Provisioning** tab.



2. Click **Edit**.
3. Select **Map from Okta Profile** as the **Attribute value** and **manager | string** as the value.
4. Check the **Create and update**.

Automatically Update Teams in Chorus

If you have successfully added the manager to provisioning in Okta, for every user that is created or updated with the manager field, your Teams in Chorus are updated automatically.

Custom Roles

To create a custom role, ensure it has been created on Chorus first, then follow these steps in the Okta app:

1. Go to the **Provisioning** tab.
2. Click on the **Edit icon** of the **Chorus Role** attribute.

Attributes						
+ Add Attribute Mappings						
FILTERS All Base Custom	Display Name	Variable Name	Data type	Attribute Type		
	Username	userName	string	Base		
	Given name	givenName	string	Base		
	Family name	familyName	string	Base		
	Primary email	email	string	Custom		
	Chorus License Type	chorus_license_type	string	Custom		
	Chorus Role	chorus_role	string	Custom		
	Manager Email	manager_email	string	Custom		

3. Click **Add Another**.
4. Add the new custom role.
5. Click Save **Attribute**.

Chorus Role

The Chorus Role

Data type

string

Display name 

Chorus Role 

Variable name 

scim2headerauth_d0o178a.chorus_role

External name

chorus_role

External namespace

urn:ietf:params:scim:schemas:core:2.0:User

Description

The Chorus Role

Enum

☒ Define enumerated list of values

Attribute members

Display name

Value

 Rep (AE/Other)

Rep (AE/Other)



 Rep (SDR)

Rep (SDR)



 Manager (AE/Other)

Manager (AE/Other)



 Manager (SDR)

Manager (SDR)



 Enablement/Leadership

Enablement/Leadership



 Admin

Admin



[+ Add Another](#)

Attribute required

☒ Yes

Scope

None

Mutability

READ_WRITE

Save Attribute

Cancel



Configure Microsoft Entra ID for Chorus

1. Contact `chorussupport@zoominfo.com` to request API access for Microsoft Entra ID integration. They will provide an API token specific to your organization.
2. In Microsoft Entra admin center, check **Enable provisioning features**.
3. Go to **Microsoft Entra ID > Enterprise Application**.
4. Click **New Application**.
5. Click **Create your own application**.
6. Type in **Chorus.ai** as the application name.
7. Click **Create**.
8. Click **Single Sign On** then, on the left panel, Select **SAML** as your **SSO method**.
9. From the **Basic SAML Configuration** section fill in the following fields:
 - Identifier (Entity ID): `https://chorus.ai`
 - Reply URL (Assertion Consumer Service URL): <https://chorus.ai/login/saml>
 - Relay State (Optional): `cmVkaXJlY3Q9JTJGbXktcHJvZmlsZSUzRg==`
 - **Note:** Field **Sign on URL** should be left empty and Logout URL should also be left empty.
10. Under **User Attributes & Claims** fill in and save the following information:
 - Under **Required Claim**, change nameidentifier Source attribute to **user.mail**
 - Under **Additional Claims**, ensure that the claims exist, with the namespace removed:
 - Claim Name: Email, Source attribute: user.userprincipalname or any field that holds the user's email address
 - Claim Name: FirstName, Source attribute: user.givenname
 - Claim Name: LastName, Source attribute: user.surname
 - Claim Name: Name, Source attribute: user.userprincipalname



Microsoft Azure Search resources, services, and docs (G+)

Home > Enterprise applications | All applications > Browse Azure AD Gallery > Chorus.ai | SAML-based Sign-on > SAML-based Sign-on >

Attributes & Claims

+ Add new claim + Add a group claim Columns | Got feedback?

Required claim

Claim name	Type	Value
Unique User Identifier (Name ID)	SAML	user.userprincipalname [...]

Additional claims

Claim name	Type	Value
http://schemas.xmlsoap.org/ws/2005/05/identity/claims/emailadd...	SAML	user.mail ***
http://schemas.xmlsoap.org/ws/2005/05/identity/claims/givenname	SAML	user.givenname ***
http://schemas.xmlsoap.org/ws/2005/05/identity/claims/name	SAML	user.userprincipalname ***
http://schemas.xmlsoap.org/ws/2005/05/identity/claims/surname	SAML	user.surname ***

Advanced settings

Before

Microsoft Azure Search resources, services, and docs (G+)

Home > Default Directory | Enterprise applications > Enterprise applications | All applications > TEST APP 001 | SAML-based Sign-on > SAML-based Sign-on >

Attributes & Claims

+ Add new claim + Add a group claim Columns | Got feedback?

Required claim

Claim name	Type	Value
Unique User Identifier (Name ID)	SAML	user.mail [nameid-forma...]

Additional claims

Claim name	Type	Value
Email	SAML	user.mail ***
FirstName	SAML	user.givenname ***
LastName	SAML	user.surname ***
Name	SAML	user.userprincipalname ***

Advanced settings

After

11. From the Single Sign-On screen capture the following data points to provide to chorussupport@zoominfo.com :

- App Federation Metadata Url
- Login URL



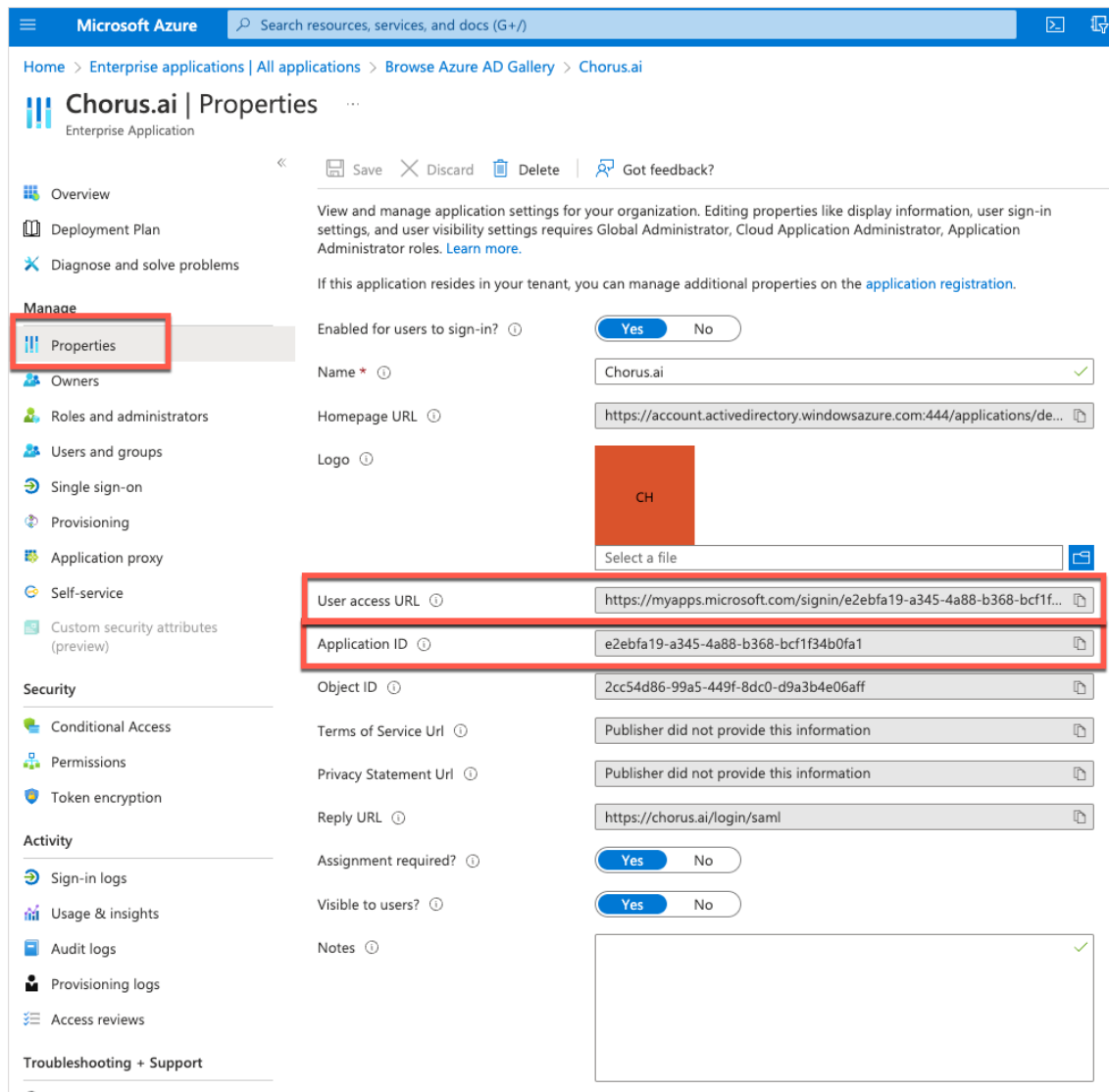
- Certificate (Base64)

12. From the **Properties** Page capture the following data points for Chorus Support:

- Application ID
- From **User access URL**, the text in the URL after “tenantid=”.
Example: 738b610e-619f-4e65-89b0-47b1acf3f9aa

Full URL:

<https://myapps.microsoft.com/signin/e2ebfa19-a345-4a88-b368-bcf1f34b0fa1?tenantId=738b610e-619f-4e65-89b0-47b1acf3f9aa>



Configuring SCIM Configuration (Provisioning)

1. Ask ZoomInfo support for SCIM token.
2. In the Chorus App Overview Page in Microsoft Entra ID, click on **Provisioning**, then **Get started**



3. Select **Automatic** in the Provisioning Mode dropdown
4. Enter "<https://chorus.ai/api/scim/v2>" in the **Tenant URL** field and the SCIM Token to the **Secret Token** field.

Microsoft Azure Search resources, services, and docs (G+/)

Home > Enterprise applications | All applications > Browse Azure AD Gallery > Chorus.ai | Provisioning >

Provisioning

Save Discard

Provisioning Mode
Automatic

Use Azure AD to manage the creation and synchronization of user accounts in Chorus.ai based on user and group assignment.

Admin Credentials

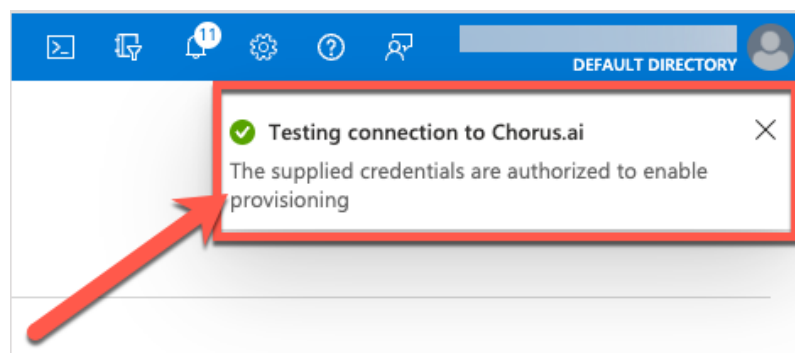
Admin Credentials
Azure AD needs the following information to connect to Chorus.ai's API and synchronize user data.

Tenant URL * ⓘ
<https://chorus.ai/api/scim/v2>

Secret Token
.....

Test Connection

5. Click **Test Connection**, if the connection is successful you'll see confirmation in the upper right corner.



6. **Save** all changes.

Configuring Role, License type, and Manager

Microsoft Entra ID provisioning does not natively support custom attributes, but we found a configuration that some customers find acceptable. It is crucial to explain to the customer that this isn't working natively as Okta before we approve their request to provision users via Microsoft Entra ID.

In order to create custom attributes the customer should pick an existing user field, for example "department". A Note: most of the customers can't create a custom attribute for the User entity.

The customer should prepare an internal mapping between the value that will be populated on this field to the Chorus Role and License Type.

For instance:

Keyword	Chorus Role	License Type
"Active SDR"	Rep (SDR)	recorder
"SDR Manager"	Rep (SDR)	recorder
IT	Admin	listener

This mapping will be used to configure the Custom Attributes as follows:

1. Back in Provisioning under the **Mapping** section, click on **Provision Microsoft Entra ID Users**.
2. This will expand additional mappings/options, at the bottom click **Show Advanced Options**.

Microsoft Azure Search resources, services, and docs (G+)

Home >

Provisioning

Save Discard

Provisioning Mode

Automatic

Use Azure AD to manage the creation and synchronization of user accounts in Chorus.ai based on user and group assignment.

Admin Credentials

1 Mappings

Mappings

Mappings allow you to define how data should flow between Azure Active Directory and customappsso.

Name	Enabled
Provision Azure Active Directory Groups	Yes
Provision Azure Active Directory Users	Yes

2

☐ Restore default mappings

Settings

Provisioning Status ⓘ

On Off

- Click **Edit attribute list for customappsso**.

☒ Show advanced options

Supported Attributes

View and edit the list of attributes that appear in the source and target attribute lists for this application.

The attribute list for Azure Active Directory is up to date with all supported attributes. [Request additional attributes you would like to see supported here.](#)

[Edit attribute list for customappsso](#)

[Use the expression builder](#)

In addition to configuring your attribute mappings through the user interface, you can review, download, and edit the JSON representation of your schema. [Review your schema here.](#)

- Add the desired attribute (chorus_role / chorus_license_type / manager_email)
- Mark them as **Required** and **Exact Case**.
- Click **Save**.



7. Click **Add New Mapping**.

- a. Mapping Type: Expression
- b. Target Attribute: chorus_role / chorus_license_type / manager_email
- c. Match objects using this attribute: No
- d. Apply this mapping: Always
- e. Expression: Microsoft Entra ID provides the ability to define a mapping by an attribute using expressions. Please read [this article for more information about "Expression"](#) and how to use them. Also, in order to test the Expression you can use the [expression builder](#). Specify the Switch Expression depending on how you define the mapping, for instance, for the mapping above:

Target Attribute	Expression
chorus_role	Switch([department], "Rep (AE/Other)", "Active SDR", "Rep (SDR)", "SDR Manager", "Rep (SDR)", "IT", "Admin")
chorus_license_type	Switch([department], "recorder", "IT", "listener", "Active SDR", "recorder", "SDR Manager", "recorder")
manager_email	IgnoreFlowIfNullOrEmpty(Switch([department], "", "IT", "azure.34994@chorus-auto.com"))

Edit Attribute ...

A mapping lets you define how the attributes in one class of Microsoft Entra object (e.g. Users) should flow to and from this application.

Mapping type ⓘ

Expression



Expression ⓘ

Switch([department], "recorder", "IT", "listener", "Active SDR", "recorder", "SDR Manager", "recorder")



The expression was correctly parsed.

Default value if null (optional) ⓘ

[Use the expression builder](#)

Target attribute * ⓘ

chorus_license_type



Match objects using this attribute

No



Matching precedence ⓘ

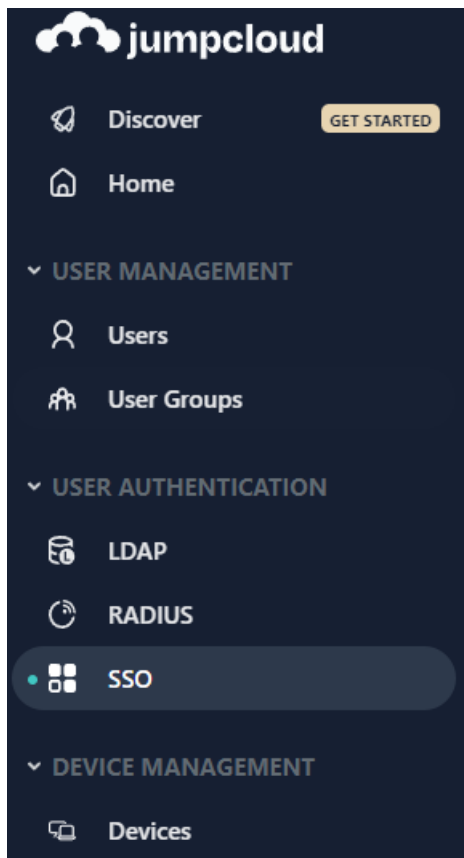
Apply this mapping ⓘ

Always

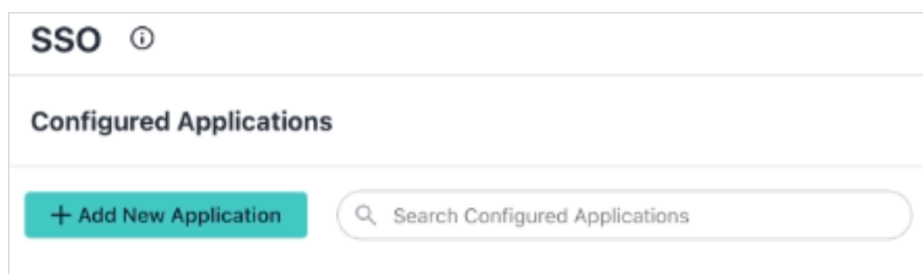


Configure Jumpcloud for Chorus

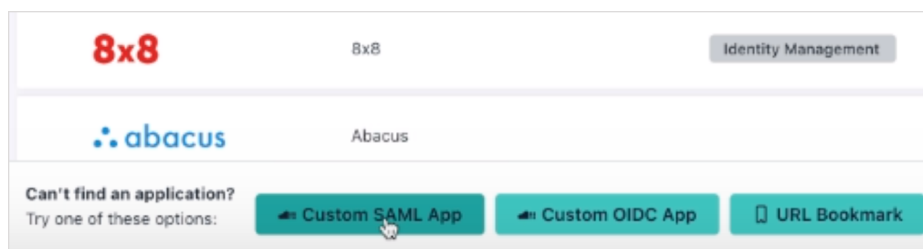
1. Go to the JumpCloud Admin Portal and click **SSO**.



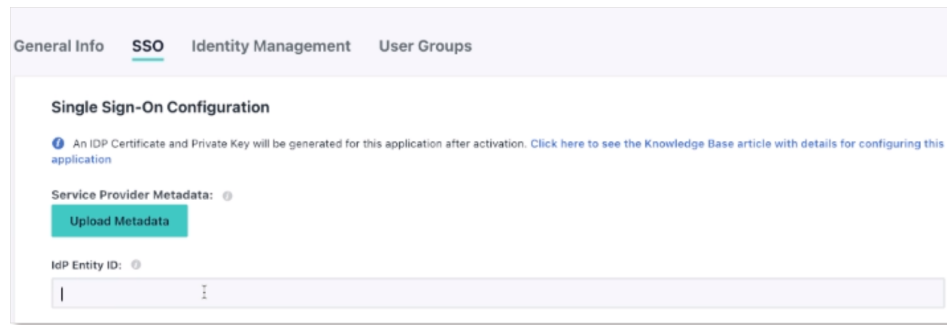
2. Click **Add New Application**.



3. Click **Custom SAML App**.



4. In the opened window, Click the **General info** tab and add '**Chorus**' in the **Display label** field, other fields are optional.
5. Click the **SSO tab**.



The screenshot shows the 'SSO' tab selected in a configuration interface. The page title is 'Single Sign-On Configuration'. Below the title, there is a blue information icon and a note: 'An IDP Certificate and Private Key will be generated for this application after activation. Click here to see the Knowledge Base article with details for configuring this application'. Under the 'Service Provider Metadata:' section, there is a teal 'Upload Metadata' button. At the bottom, there is a label 'IdP Entity ID:' followed by a text input field containing a single character 'I'.

Fill out the following fields:

- IdP Entity ID: needs to be something unique. Recommend name convention - jumpcloud-customername
- SP Entity ID: <https://chorus.ai/login/saml>
- ACS URL: <https://chorus.ai/login/saml>
- Check Sign Assertion
- Default RelayState: cmVkaXJlY3Q9Lw==
- IDP URL: make something up
- Map service provider attribute name to jump cloud attributes names. Here's an example.

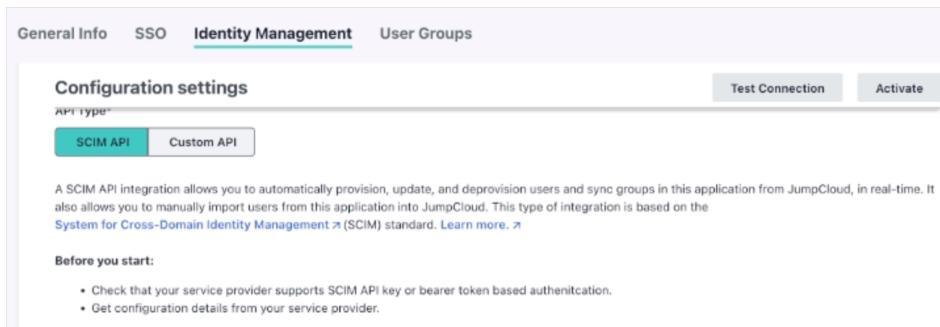
Attributes

If attributes are required by this Service Provider for SSO authentication, they are not editable. Additional attributes may be included in assertions, although support for each attribute will vary for each Service Provider. [Learn more.](#)

User Attributes: 

Service Provider Attribute Name	JumpCloud Attribute Name	
FirstName	firstname ▼	
LastName	lastname ▼	
Email	email ▼	

6. Click the **Identity Management** tab.



General Info SSO **Identity Management** User Groups

Configuration settings Test Connection Activate

API type

☒ SCIM API ☐ Custom API

A SCIM API integration allows you to automatically provision, update, and deprovision users and sync groups in this application from JumpCloud, in real-time. It also allows you to manually import users from this application into JumpCloud. This type of integration is based on the [System for Cross-Domain Identity Management](#) (SCIM) standard. [Learn more.](#)

Before you start:

- Check that your service provider supports SCIM API key or bearer token based authentication.
- Get configuration details from your service provider.

7. Under **SCIM version** select **SCIM 2.0** and fill out the SCIM base URL - <https://chorus.ai/api/scim/v2>.

Ask Chorus for **Token Key** (same as Okta) and fill the **Test user email**.



SCIM Version*

SCIM 1.1 SCIM 2.0

Base URL*

https://chorus.ai/api/scim/v2

Token Key

Test User Email*

email@domain.com

8. Send the following information to Chorus:

- IDP URL
- IdP Entity ID
- Copy Metadata URL > Metadata URL (once the application is configured click **Chorus** on your configured app list > SSO > Copy Metadata URL)

General Info **SSO** Identity Management User Groups

SAML 2.0

Single sign-on

- Integration Status
- IDP Certificate Valid expires 02-22-2028
- IDP Private Key Valid

Single Sign-On Configuration

To learn more about this configuration, including restricting access to specific users, please visit our [Knowledge Base](#)

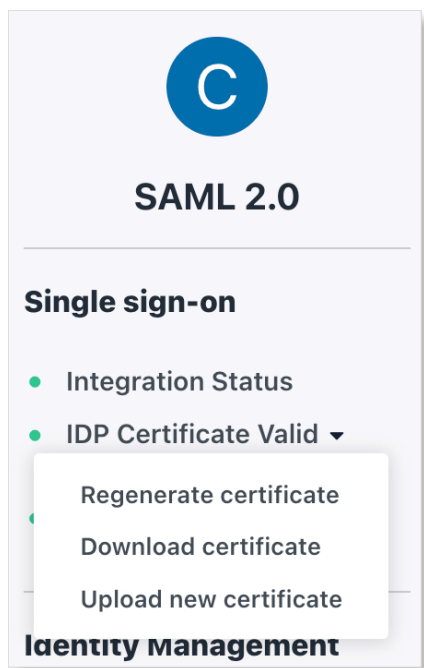
JumpCloud Metadata:

Export Metadata Copy Metadata URL

Service Provider Metadata:

Upload Metadata

- On Left click **Download Certificate > SAML Certificate**.



9. Check the **Declare Redirect Endpoint** checkbox and change the SAML format as in the screenshot below.

