Data Connectors Integration Guide

Build custom data connectors to integrate external systems with ZoomInfo

The ZoomInfo platform enables you to create custom data connectors to external systems, allowing your organization to extend beyond the pre-built integrations that ZoomInfo provides. With data connectors, you can connect to virtually any system that provides API or database connectivity, enabling seamless data flow between your essential business tools and ZoomInfo.

Data connectors provide the following benefits:

- **Extend Platform Capabilities**: Connect ZoomInfo to your unique technology stack
- **Customize Data Flow**: Define exactly what data moves between systems
- **Scale Without Limitations**: Create as many connectors as your organization needs
- **Reduce Development Overhead**: Configure connectors through a user-friendly interface without writing code

In the future, data connectors will allow businesses to use data in ways that were previously not possible. This will provide a deeper understanding of the target market and enable automated actions tailored to specific business needs. Businesses will be able to streamline operations, optimize marketing strategies, and better reach and engage their target audience.

Prerequisites

Before creating a data connector, ensure you have the following in place.

Required permissions:

- Administrator access to GTM Studio/Admin Portal
- Permission to create and manage integrations

For the external system you're connecting to, gather:

- Authentication details (OAuth credentials or API keys)
- API documentation including endpoints for the system you are connecting to
- Sample request/response data for testing

Verify which authentication method your target system uses:

- OAuth 2.0
- API Key

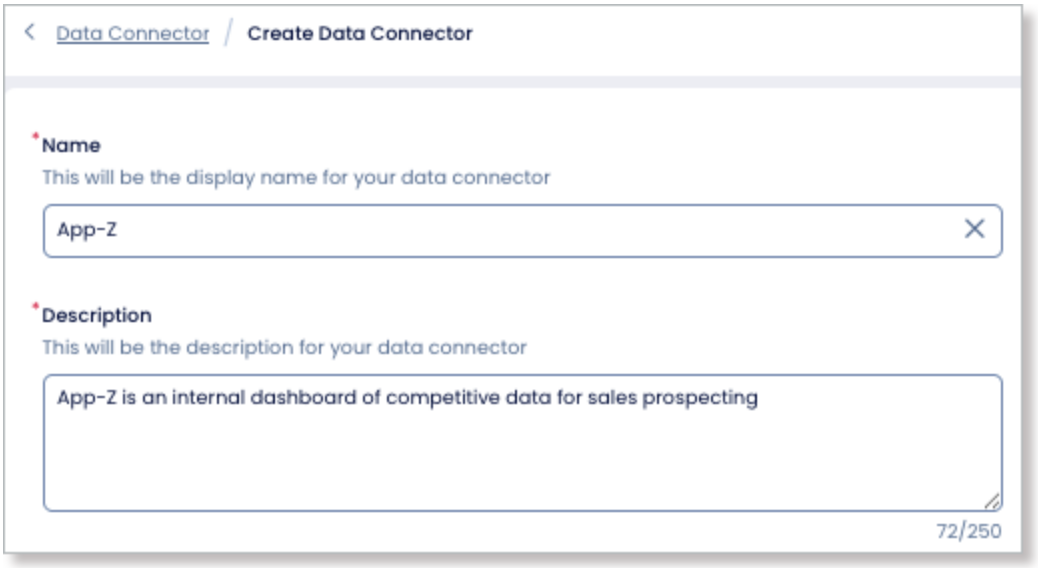
Implementing a Data Connector

Create a New Data Connector

1. Navigate to **GTM Studio/Admin Portal**.
2. Select **Integrations** from the navigation menu.
3. Select **Custom Data Connectors**.
4. Click **Create data connector**.
5. Complete the following fields:

Name: The display name for your custom data connector

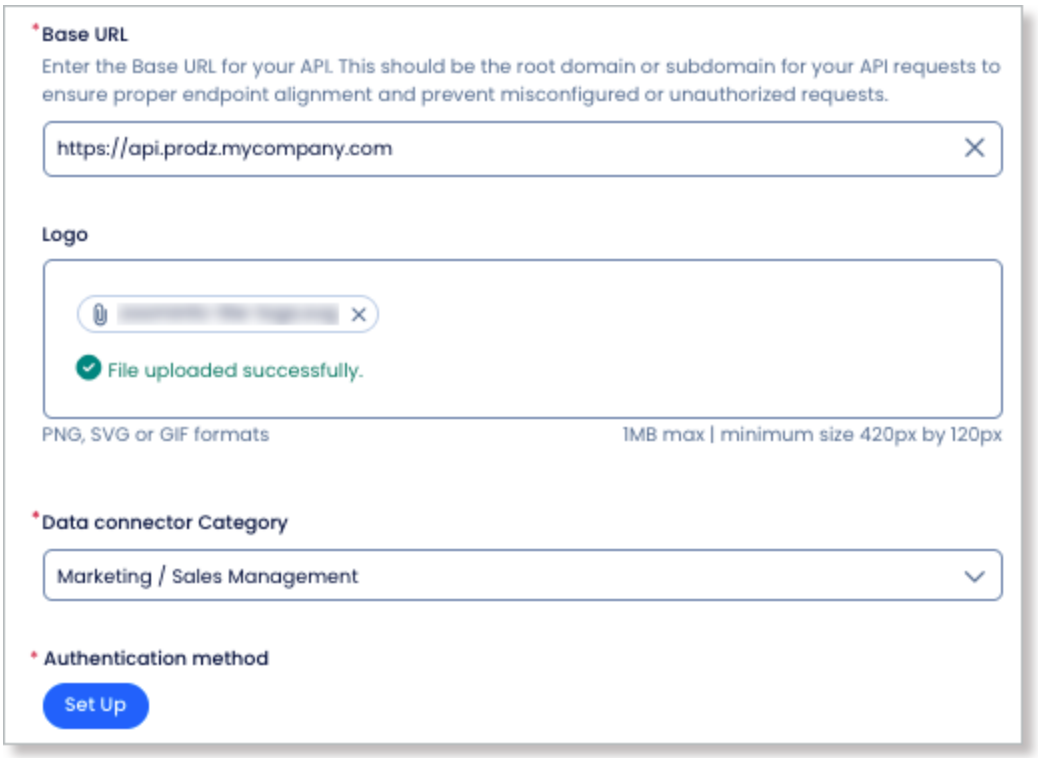
Description: Provide a contextual description



Base URL: The base URL to access the API for the connector

Logo: Logo image for the data connector

Data Connector Category: Select appropriate category from the dropdown

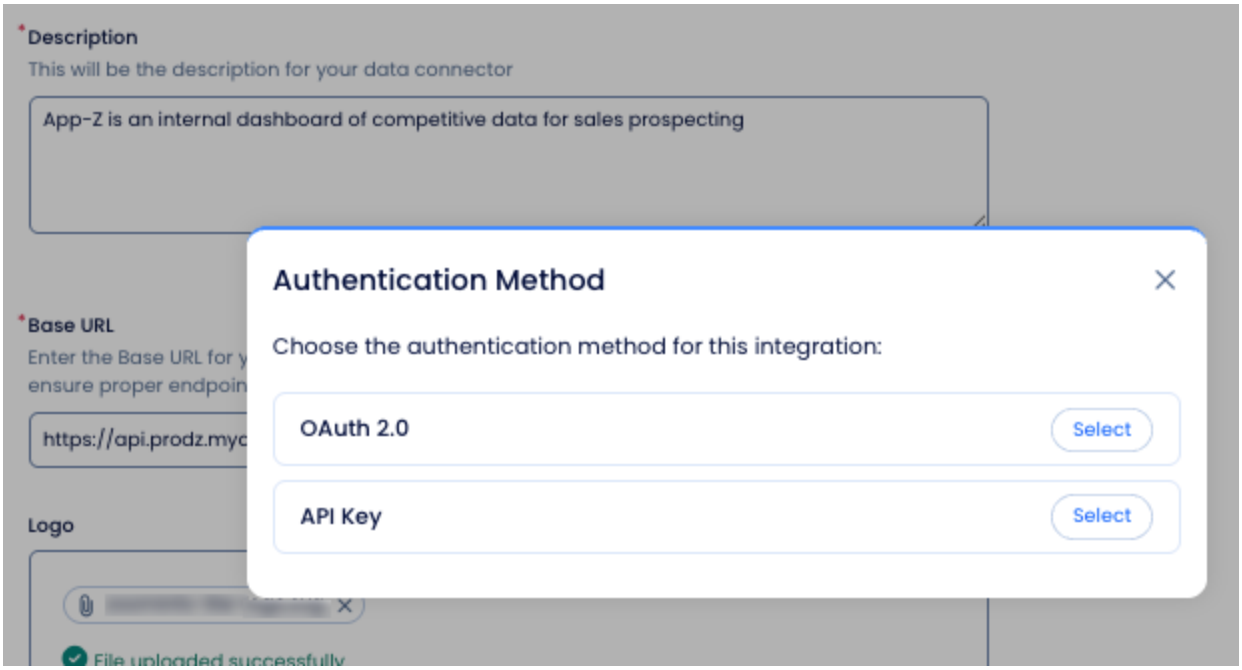


6. Under **Authentication method**, click **Set Up**.

   See Setting Up the Authentication Method for details.

Set Up the Authentication Method

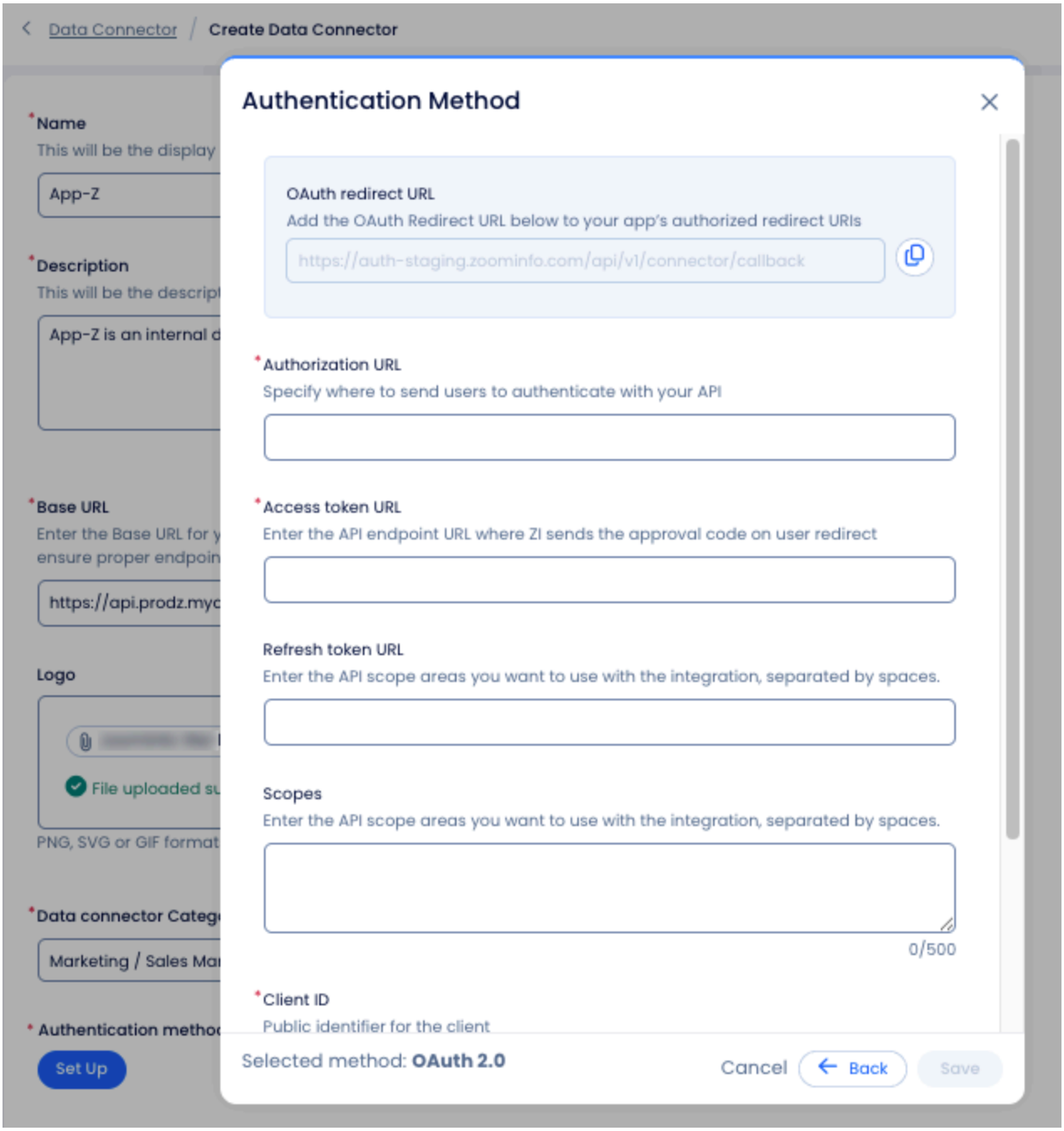
Select the authentication method based on your external system.



OAuth 2.0 Authentication

If using OAuth 2.0 as your authentication method, complete the following fields:

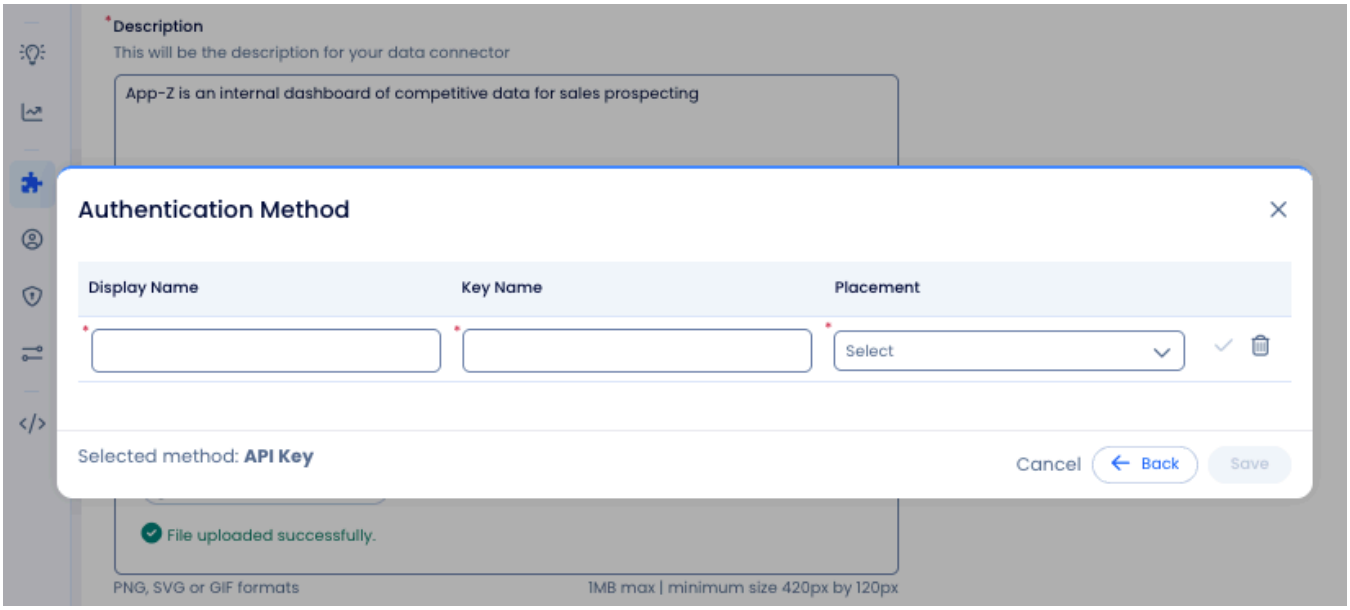
1. **OAuth redirect URL**: Copy this URL and add it to your connected application's authorized redirect URIs.
2. **Authorization URL**: Enter the Authorization URL (e.g., https://auth.example.com/oauth2/authorize) that specifies where to send users to authenticate with your connected app's API.
3. **Access token URL**: Enter the Access Token URL (e.g., https://auth.example.com/oauth2/token). This is the API endpoint URL where ZoomInfo will send the approval code on user redirect.
4. **Refresh token URL**: Enter the Refresh Token URL (e.g., https://auth.example.com/oauth2/refresh_token). This is the API endpoint URL where ZoomInfo sends the refresh token.
5. **Scopes**: Add any required scopes (separated by spaces).
6. **Client ID**: Enter the Client ID.
7. **Client secret**: Enter the Client Secret.



8. When done, click **Save**.

API Key Authentication

1. If using an API key as your authentication method, complete the following fields:
    - **Display Name**: Enter the display name for your API credentials
    - **Key Name**: Enter the key value for your API credentials, e.g. “Authorization”
    - **Placement**: Select the token placement (Query parameter, Header, or Body)



2. When done, click **Save**.

Connect Your Data Connector

If using OAuth 2.0 as your authentication method, you'll be redirected to the external system to authorize. Complete the authorization process on the external system.

If using API Key as your authentication, enter your API Key and click **Connect**.

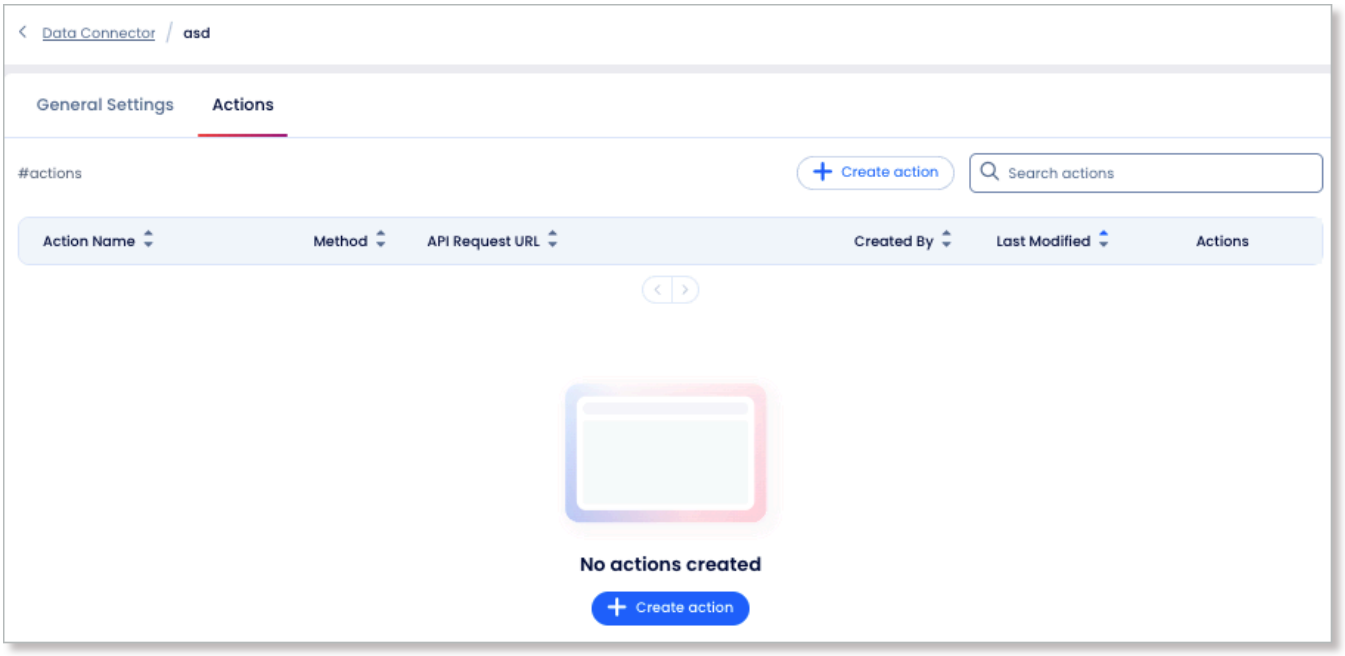
You can also connect your Data Connector from the **Data Connectors** page. Click **Actions ... > Connect** for the connector you created.

Create Data Connector Actions

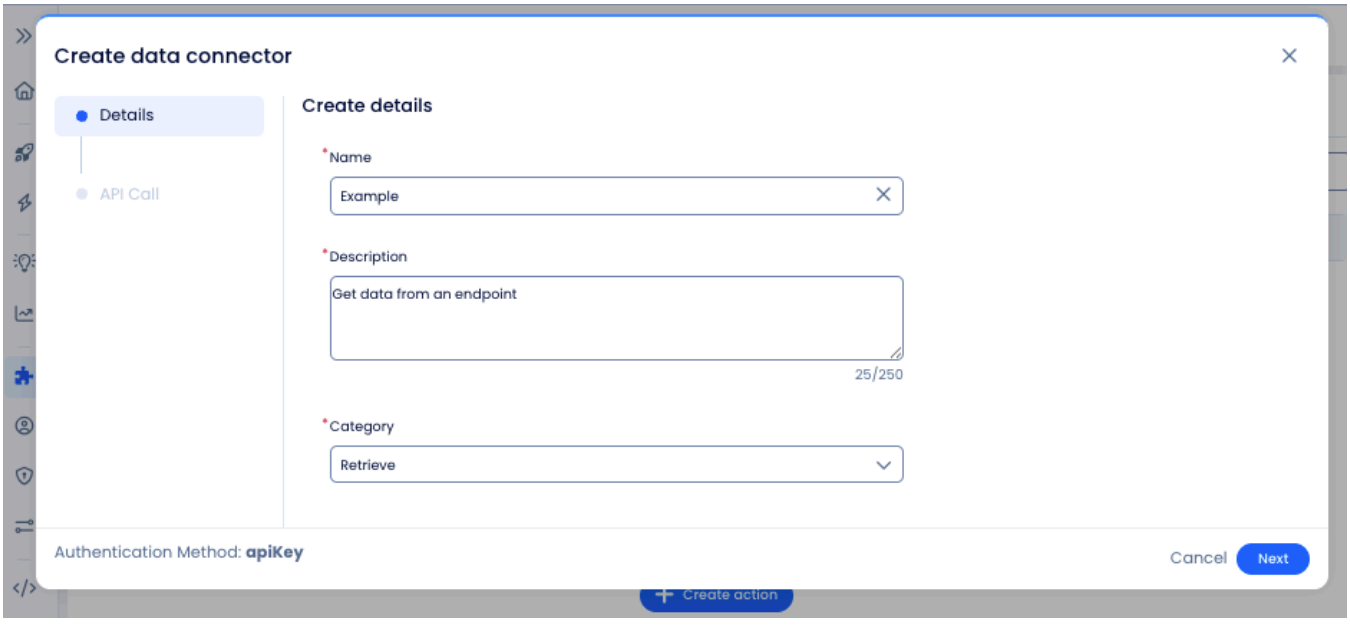
Once your data connector is established, you can create actions to interact with specific endpoints.

1. From the **Data Connectors** page, click your connector.
2. Select the **Actions** tab.

    Here, you can create one or more actions for the connector. Each action corresponds to a single API call (e.g., GET <data>, PUT <data>, and so on).
3. Click **Create action**.



4. On the **Details** step, complete the following fields:
    - **Name**: Contextual name
    - **Description**: Contextual description
    - **Category**: Select the desired category for the action (Retrieve, Enrich, or Connect)



5. Click **Next**.
6. On the **API Call** step, configure the API call:
    - Select the **Request Type** (GET, POST, PATCH, PUT, or DELETE)

- Enter the **API Endpoint** URL. Use {parameter} syntax for any dynamic inputs. The parameters will appear in the **Parameters (Optional)** tab
- For POST/PUT/PATCH requests, select the **Body (Optional)** tab and define the JSON body
- Select the **Headers (Optional)** tab and any additional headers

7. Click **Next**.
8. Test the endpoint:
    a. Click **Test API**.
    b. Enter sample values for any required parameters.
    c. Review the test results.
9. Define the output:
    a. Use the test result as a template or
    b. Paste in a sample JSON response
    c. This will define the available output fields for consumers of this action
10. Review all input parameters and finalize the action by clicking **Save**.
11. Add more actions as needed using this procedure.

User Experience

After setting up data connectors and actions, users in your organization will benefit from the ability to use data from external systems within ZoomInfo Workbooks.