

Data Connectors Integration Guide

Build custom data connectors to integrate external systems with ZoomInfo and enrich GTM Studio Audiences

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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

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 requests for the endpoints (JSON)

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

< [Data Connector](#) / Create Data Connector

***Name**
This will be the display name for your data connector

App-Z X

***Description**
This will be the description for your data connector

App-Z is an internal dashboard of competitive data for sales prospecting

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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

***Base URL**
Enter the Base URL for your API. This should be the root domain or subdomain for your API requests to ensure proper endpoint alignment and prevent misconfigured or unauthorized requests.

https://api.prodz.mycompany.com

Logo

File uploaded successfully.

PNG, SVG or GIF formats 1MB max | minimum size 420px by 120px

***Data connector Category**

Marketing / Sales Management

*** Authentication method**

Set Up

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.

***Description**
This will be the description for your data connector

App-Z is an internal dashboard of competitive data for sales prospecting

***Base URL**
Enter the Base URL for y ensure proper endpoint

https://api.prodz.myc

Logo

File uploaded successfully

Authentication Method

Choose the authentication method for this integration:

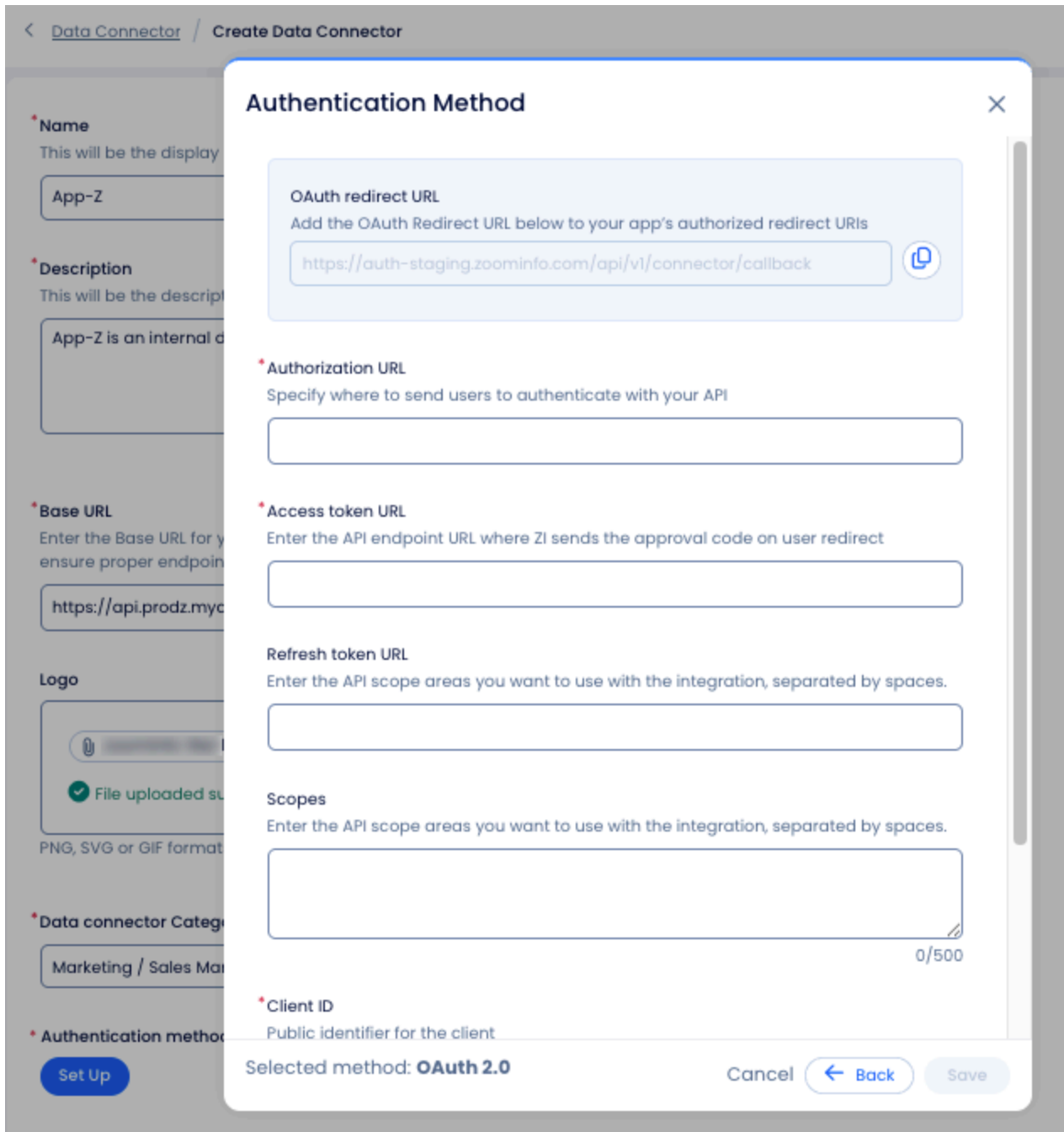
OAuth 2.0 Select

API Key Select

OAuth 2.0 Authentication

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

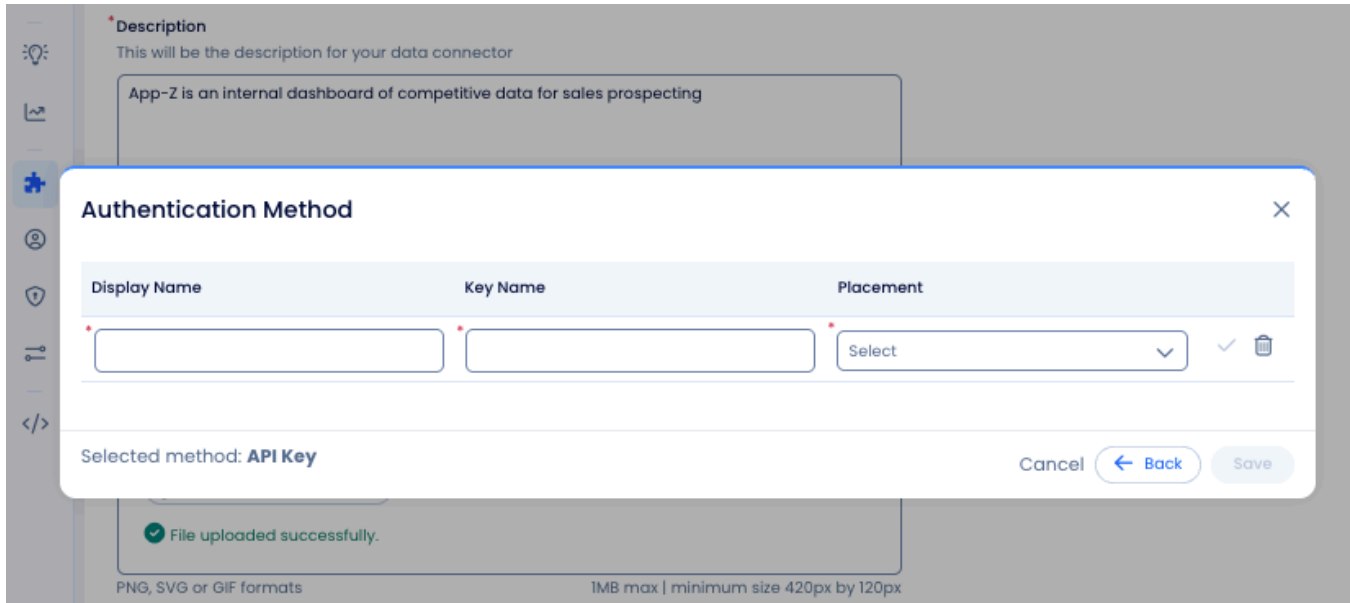
1. **OAuth redirect URL:** Copy this URL and add it to your connected application's authorized redirect URIs.
2. **Authorization URL:** Enter the Authorization URL (e.g., <https://auth.example.com/oauth2/authorize>) that specifies where to send users to authenticate with your connected app's API.
3. **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.

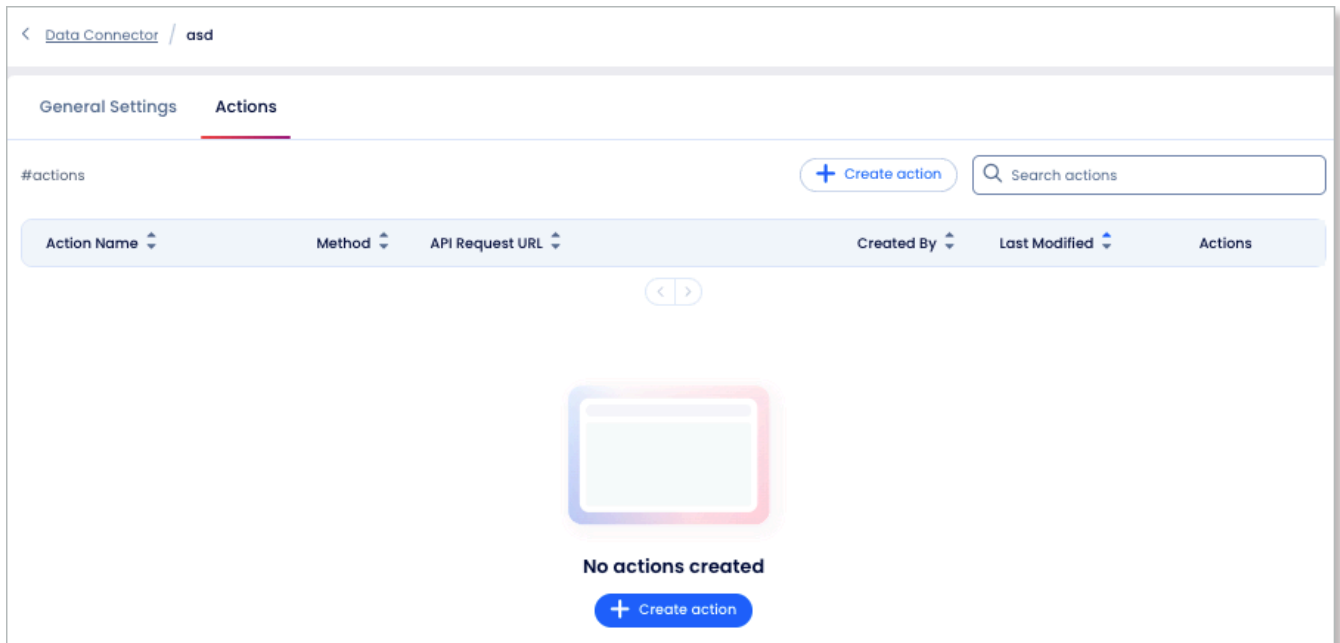
Create Data Connector Actions

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.

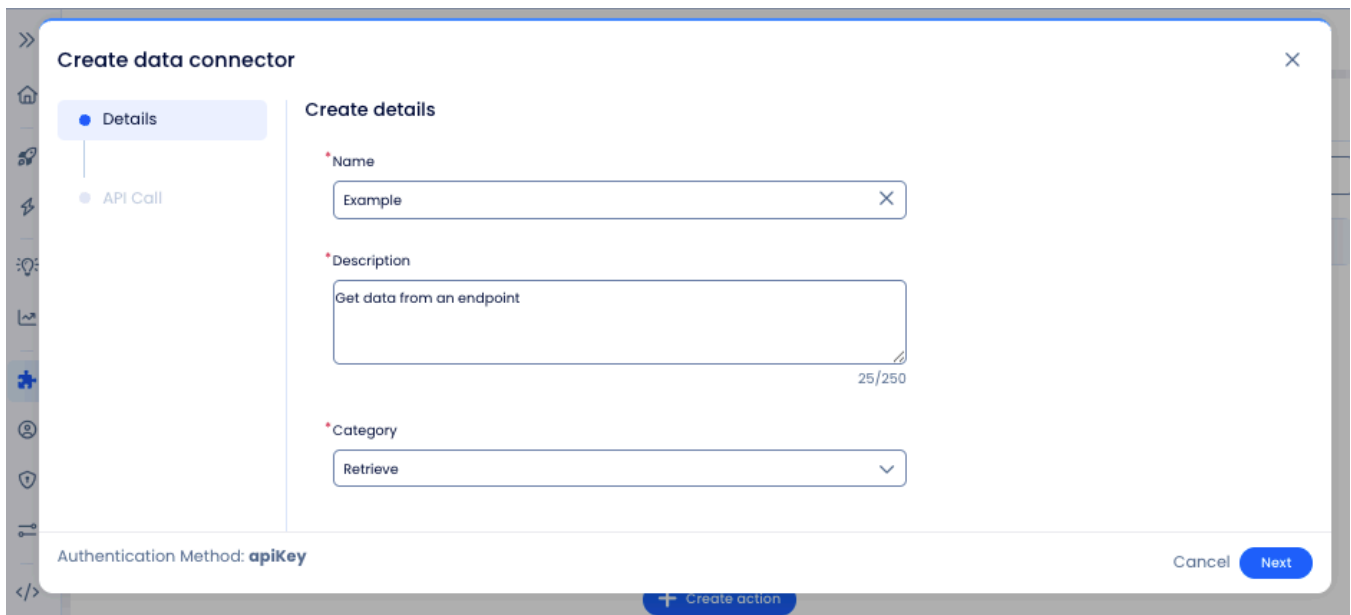
Here, you can create one or more actions for the connector. Each action corresponds to a single API call (e.g., GET <data>, PUT <data>, and so on).

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 Export)



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. These will appear in the **Parameters (Optional)** tab
- Select the **Headers (Optional)** tab and any additional headers

< Custom Data Connectors / Example / New Action

Details
 API Call
 Output
 Form
 Review & Save
 Cancel

Define API call

*Request Type *Api Endpoint

Parameters (Optional) Headers (Optional) Test response

Parameters are automatically extracted from the API endpoint. Any value wrapped in `{{ }}` within the URL appear here as a parameter.

Name	Field Type	Test Value	Required?
opportunity_id	<input type="text" value="string"/>	<input type="text"/>	<input type="checkbox"/>

7. For **POST/PUT/PATCH** requests only, select the **Body (Optional)** tab and define the JSON body

< Custom Data Connectors / Example / New Action

Details API Call Output Form Review & Save Cancel Back Next

Define API call

*Request Type *Api Endpoint

POST https://api.zoominfo.com/ my_endpoint/{{opportunity_id}} Test API

⚠ Testing a POST request may modify data. Please use test data to avoid unintended changes

Parameters (Optional) **Body (Optional)** Headers (Optional) Test response

```
{
  "name": "{{name}}",
  "email": "{{email}}",
  "domain": "{{domain}}"
}
```

Copy

8. Configure any parameters on the **Parameters (Optional)** tab.
 - a. Select the **field type** (string, number, date, boolean, array)
 - b. Check whether the field is **required**



Define API call

*Request Type *Api Endpoint

POST https://api.zoominfo.com/ my_endpoint/{{opportunity_id}} Test API

⚠ Testing a POST request may modify data. Please use test data to avoid unintended changes

Parameters (Optional) Body (Optional) Headers (Optional) Test response

Parameters are automatically extracted from the API endpoint. Any value wrapped in {{ }} within the URL appear here as a parameter.

Name	Field Type	Test Value	Required?
opportunity_id	number	<input type="text"/>	<input checked="" type="checkbox"/>
name	string	<input type="text"/>	<input checked="" type="checkbox"/>
email	string	<input type="text"/>	<input checked="" type="checkbox"/>
domain	string	<input type="text"/>	<input type="checkbox"/>

9. Optional: Test the API call

- a. Enter sample values for Parameters on the **Parameters (Optional)** tab
- b. Click **“Test API”**. This will send an API request to the specified URL.
- c. The resulting response will appear in the **Test response** tab

10. Click **Next**.

11. On the **Output** step, define the action output:

- a. Click “generate output with test” to use the test response, or
- b. Paste in a sample JSON response
- c. Edit the response as needed, for instance, by removing unneeded nodes from the JSON
- d. This will define the available output fields for this action within Workflows. Click **“Schema Preview”** to see the output fields generated from the response.

12. Click **Next**.

13. On the **Form** step, optionally customize the form (see below) or click **Next**.

14. On the **Review and Save step**, review the Action details

15. Finalize the action by clicking **Save**. This will save the action and make it available to GTM Studio users.

16. Add more actions as needed using this procedure.

Customize Form (optional)

You can customize how the Action inputs (parameters) will appear to users inside ZoomInfo apps. Change display names and text, display order, or configure special form fields like dropdowns. This step is optional.

1. Go to the **Form** step (optional) to customize how the Action and input parameters will appear to GTM Studio users
 - a. Under **Form Configuration**, drag and drop the form fields to change the display order
 - b. To edit a field, Click on the pencil icon
 - c. Select a **field type** (Text input, Text area, Dropdown)
 - d. Enter a **display label**. This is the field name that users will see.
 - e. Optionally add placeholder text, hint text, and/or info icon text.

The screenshot shows the 'Form' configuration step in GTM Studio. At the top, a progress bar indicates the current step is 'Form', with previous steps 'Details', 'API Call', and 'Output' completed, and 'Review & Save' pending. Navigation buttons for 'Cancel', 'Back', and 'Next' are visible. The main area is titled 'Define form configuration' and includes instructions: 'Customize field type, label, validation and display options. Click to edit field properties, drag or reorder'. Below this, there are 'Form fields (4)' listed: 'name (String)', 'opportunity_id (String)', 'email (String)', and 'domain (String)'. To the right is a 'Form Preview' window titled 'Create Contact Example' which shows a visual representation of the form with input fields for each parameter and placeholder text: 'Type the placeholder text you want to display in the field'. Below each field is a hint text: 'Type '/' to see available attributes'.

2. To configure a **Dropdown**:

- a. Select the dropdown type (Static or Dynamic)
 - b. Choose between Single select and Multi select
 - c. Click Next.
3. For a **Static dropdown** (preset list items)
 - a. **Upload a CSV** with 2 columns (no headers) for Display name and Value, or:
 - b. Enter a **Value** (required) and **Display Name** (optional) for each item in the dropdown list
 - c. Click **"Add Option"** to add more items to the dropdown list
 - d. Click the trash can icon to delete items
 - e. Click **"Apply"**
4. For a **Dynamic dropdown** (list items are generated dynamically) from an Action / external API call)
 - a. Select a **Data Source** for the list. This is the Action that will generate the list. Only Actions sharing the same Connector as the current Action can be selected as the Data Source.
 - b. Select the **List Key**. This is the key in the response JSON which contains the list of dropdown items.
 - c. Select the **Value** (required) and **Display Name** (optional) keys
 - d. Fill in any input values (parameters) the Data Source needs, either by typing in static values, or by using the expression input / to map a field dynamically from the form based on user selection
 - e. Click **"Apply"**
5. In the **Form preview**, view how the form will appear to ZoomInfo end users
6. Click **Next**
7. On the **Review and Save step**, review the Action details
8. Finalize the action by clicking **Save**. This will save the action, including the form, and make it available to GTM Studio users.

User Experience

After setting up data connectors and actions, users in your organization will benefit from the ability to use data from external systems as enrichments in GTM Studio Audiences .

1. In an Audience, click **Actions**

2. Click **View All Enrichments**
3. Click **Connectors** or use the search bar and select your Data Connector
4. Select the Action from the dropdown
5. Fill or map the form to use it to enrich your Audience