Enrich for Salesforce Integration Guide

For administrators setting up ZoomInfo Enrich integration with Salesforce

ZoomInfo Enrich is a feature available for ZoomInfo Sales. Enrich includes two applications for keeping your Salesforce database up to date with accurate B2B contact and company data.

- With **Instant Enrich**, your lead, contact and account records will be instantly appended with ZoomInfo data as they are created in your Salesforce environment.
- **Scheduled Enrich** provides scheduled jobs to keep your Salesforce records enriched on a regular cadence.

Install the ZoomInfo for Salesforce Native Application

Before configuring Scheduled or Instant Enrich, install the ZoomInfo for Salesforce Native Application in your Salesforce instance.

The app package includes the **ZoomInfo Contact ID** and **ZoomInfo Company ID** fields. These managed fields are unique identifiers for ZoomInfo contact and company records and are required to be present before you can map your ZoomInfo to Salesforce fields when configuring Scheduled or Instant Enrich.

1. Go to the Salesforce AppExchange and search for *ZoomInfo - GTM Intelligence Platform*
2. Click **Get It Now** to install the package.
3. Select the desired Salesforce environment (**Production** or **Sandbox**).

   Important: When selecting an environment, you may elect to install the package in your Sandbox environment in order to test the functionality. Please note that using Enrich in a Sandbox environment will still incur bulk credit charges (as it does in a Production environment). As a result, we recommend that you perform your testing in small batches and, if necessary, work with your ZoomInfo Enrich Implementation Specialist to help meet your testing goals before implementing in Production.
4. Install the package for all users.

Required Salesforce Permissions

ZoomInfo Enrich requires the following permissions in Salesforce.

- View Setup and Configuration
- Customize Application
- Custom Metadata Type access to "ZoomInfo.DOZISF.JWT Setting"
- Enable Custom Setting Definitions Access to "ZoomInfo.DOZISF.Complete Setting"

Application Settings:

- API Enabled
- Apex REST Services
- Create and Customize List Views
- Read/write/edit access to Account, Contact, and Lead objects
- Field Level Security read/write access to Account Contact and Lead fields (standard and custom) mapped. This mapping is user defined within the configuration of Enrich.

Custom Field Recommendations

Download this Excel spreadsheet that shows all potential fields ZoomInfo can enrich in Salesforce and recommendations for creating these fields in Salesforce.

Scheduled Enrich

Keep your Salesforce database up to date with routine data enrichments. Data enrichment jobs allow you to select a frequency you would like to update your Salesforce database and custom mapping configuration to determine exactly how you want to capture and write ZoomInfo data.

Before You Begin

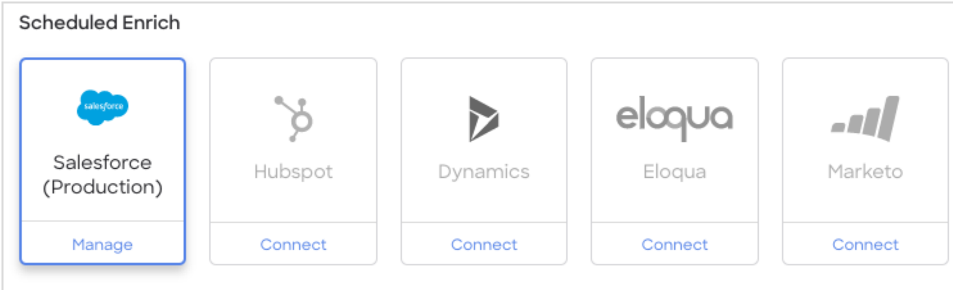
Before configuring Scheduled or Instant Enrich, install the latest version of the ZoomInfo for Salesforce Native Application in your Salesforce instance.

Connect ZoomInfo to Salesforce

1. Go to **Admin Portal > Integrations > Connect Enrich**.
2. In the **Scheduled Enrich** section, click **Connect** under the Salesforce tile.
3. Select your environment and click **Connect**.

   A pop-up displays to connect your Salesforce user dedicated to running Enrich.
4. After connecting, click **Grant Access**.

   Note: Disable your browser's pop-up blocker if you did not see the Salesforce window display.
5. After successfully connecting, the Salesforce tile will display a **Manage** option. Click **Manage**.

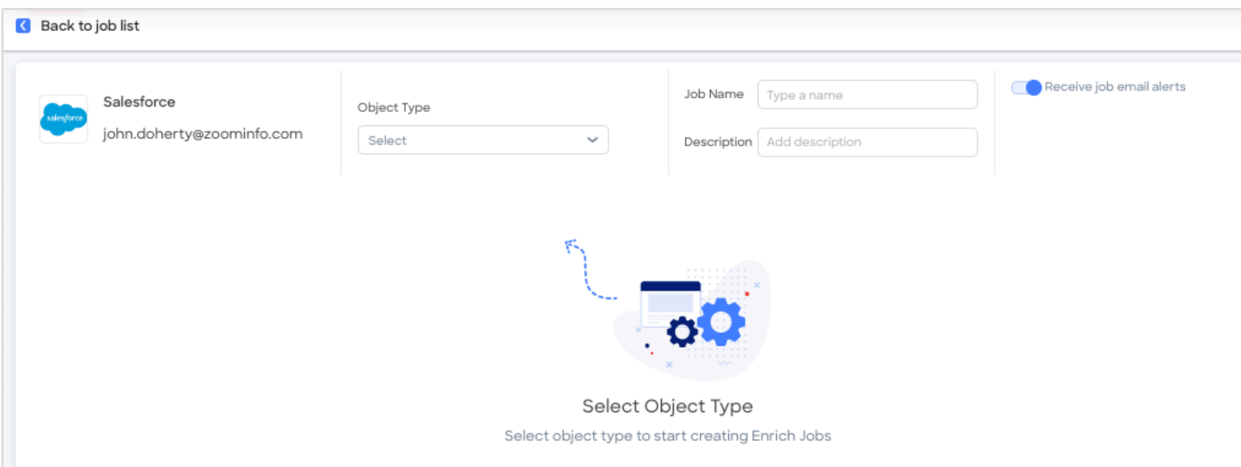


Add Scheduled Jobs

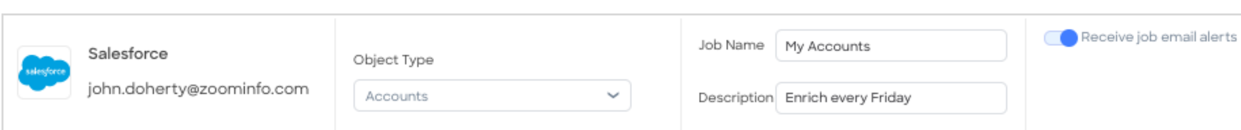
Add recurring scheduled jobs to keep your Salesforce records enriched. Within each job, you'll specify the frequency of enrichment, specify the static list to enrich, and configure the mapping of ZoomInfo data to Salesforce properties.

To add a scheduled job:

1. Click **Manage** under the Scheduled Enrich Salesforce tile.
2. Click **New Job**.

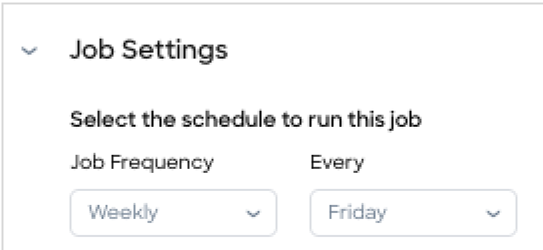


3. For **Object Type**, select either **Accounts**, **Contacts**, or **Leads** in the drop-down.
4. Provide a **Job Name** and **Description** and choose whether you want job email alerts.



Job Settings

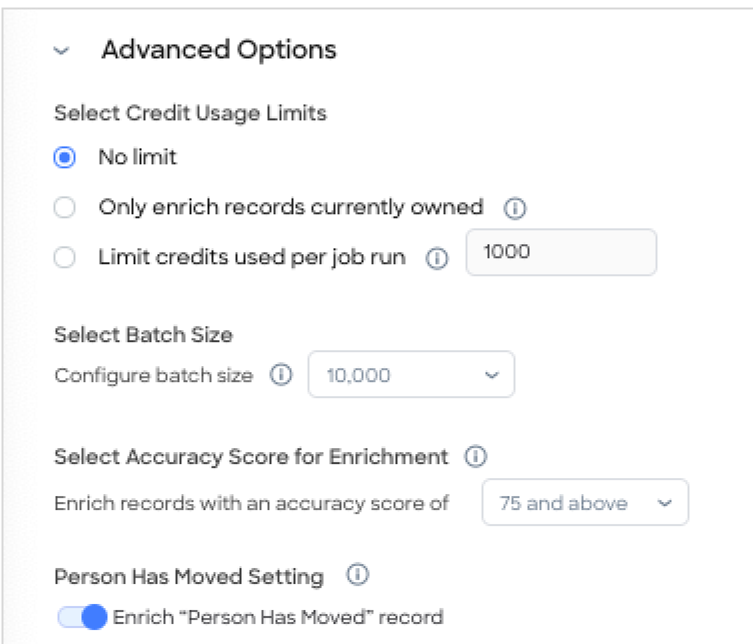
Configure the run frequency for your job.



Select the schedule to run this job: Configure the job frequency for recurring jobs. Jobs begin at 12:00 AM ET on the scheduled day.

Advanced Options

You can control credit usage when a job is run.



Select Credit Usage Limits

Select one of the following options:

- **No limit**: Default option. All records in the job run will be enriched and applicable credits will be charged.
- **Only Enrich records currently owned**: Enrich only the records that are currently under management. This option does not incur any credit charges.
- **Limit credits used per job run**: Limits the number of credits spent for each job run to the number specified. Once the specified number of credits is reached, processing is stopped. Remaining records will be enriched in the next job run.

Select Batch Size

Choose the batch size (10K, 1K, 500, or 200) for the number of records processed per API call. The default batch size is 10,000.

Note the following when configuring the batch size for your organization:

- A larger batch size results in less calls to the Salesforce Bulk API.
- Reducing the batch size will lead to increased Salesforce API call consumption.

Select Accuracy Score for Enrichment

You can control contact enrichment by Accuracy Score, ensuring you are only enriching contacts that meet your minimum business requirements.

Note the following:

- Matched records that are not enriched because they do not meet your minimum Accuracy Score will be marked as **No Match** with a **No Match Reason** of "Below selected Accuracy Score".
- If you've enabled the **Enrich ZoomInfo Custom Object** toggle (under **Mapping**), contacts that do not meet the minimum Accuracy Score are not exported to the custom object.

Person Has Moved Setting

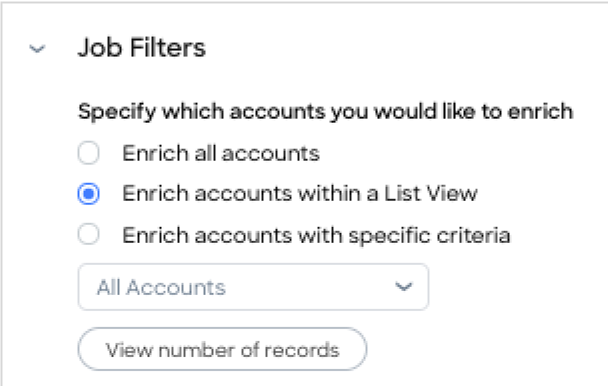
When ZoomInfo data indicates that a person has moved organizations, Scheduled Enrich jobs will do one of the following, depending on this setting:

- If **enabled** (default), the Person Has Moved record will be enriched to reflect the new organization. This is the existing default behavior that is automatically enabled in your Scheduled Enrich jobs unless you disable it.
- If **disabled**, the Person Has Moved record for Contacts and Leads will not be enriched.
    - ZoomInfo will continue to enrich the company fields as if the person has not moved
    - The **Enrich Status** will change to **Company Match Only**

For details on mapping and other considerations for this setting, see Person Has Moved Field Mapping.

Job Filters

Choose the method to define the data set to enrich.



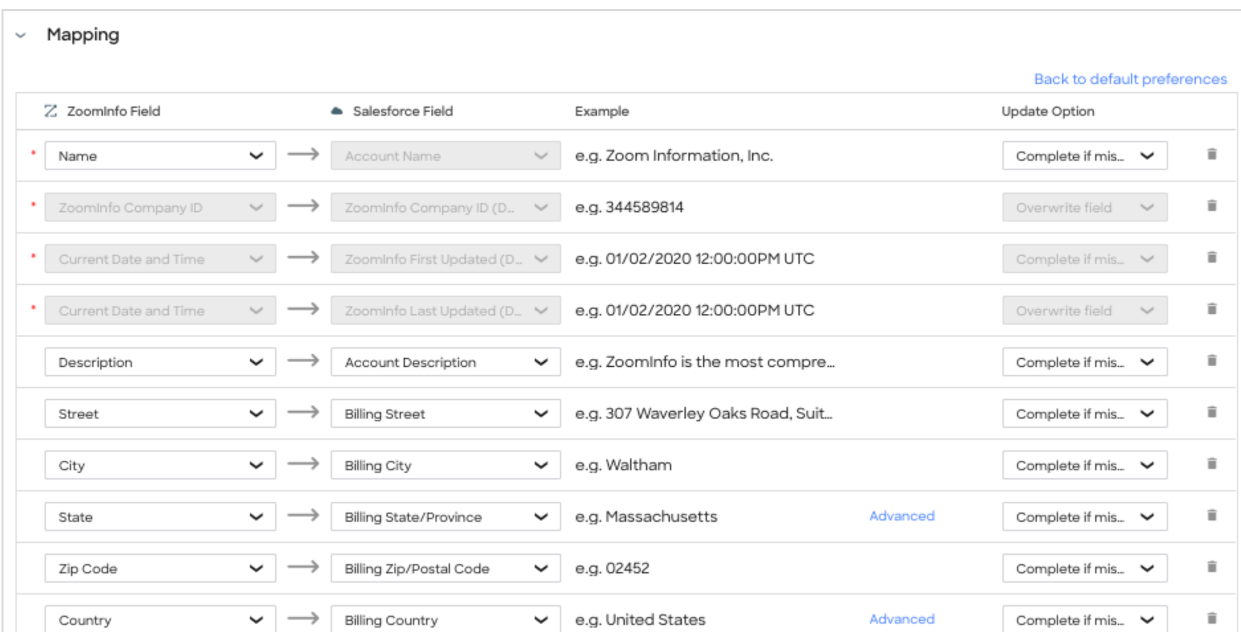
Enrich all <objects>: Queries all the records within the Salesforce object

Enrich <objects> within a List View: Displays a dropdown menu of all available Salesforce lists that have enrichable records. Click View number of records to see the size of the selected list.

Enrich <objects> with specific criteria: Add field filter criteria to specify which objects you want to enrich. Each criteria row is joined with an AND operator.

Mapping

Configure the field mapping of ZoomInfo to your integration and the update logic for each field.



ZoomInfo Field: Select the ZoomInfo data point you would like to return

Salesforce Field: Select the Salesforce field you would like to capture the specified data (supports custom fields, as well)

Update Option: Select whether you would like to overwrite existing data for complete if missing.

Important: ZoomInfo recommends the following:

- Work with your Salesforce administrator to understand field mapping and update options to ensure records are enriched as expected.
- Set all standard Salesforce fields to **Complete if missing** (this is the default state). Only select **Overwrite** for custom fields created specifically for ZoomInfo.
- **ZoomInfo Contact ID** and **ZoomInfo Company ID** are unique identifiers for ZoomInfo contact and company records. You should create and map custom fields to these fields.

Person Has Moved Field Mapping: If you've enabled the Person Has Moved setting, map the ZoomInfo Person Has Moved field to an existing or custom field in your CRM.

- Use a text field type to avoid any formatting issues. Field values displayed are:
  - **Yes**: This person has left the company you had them profiled in
  - **No**: This person is still with their current company
  - **Uncertain**: ZoomInfo cannot verify if this person has left or not
- Set the **Update Option** field to **Overwrite** to be able to identify when a record changes after a job is run.
  - You can view the **Person Has Moved** column on the Enrich dashboard to see contacts where the **Person Has Moved** value is **Yes**.
  - You can run a report in your CRM that keys on the field to which you mapped the ZoomInfo **Person Has Moved** field, and where the field value is **Yes**.
- Enrich does not associate contacts with their new companies. It is up to your organization to evaluate these records and adjust associations.
- The majority of the effort to resolve company associates for contacts occurs on the first run of a Scheduled Enrich job. Subsequent runs typically pick up a small number of deltas when people change companies.

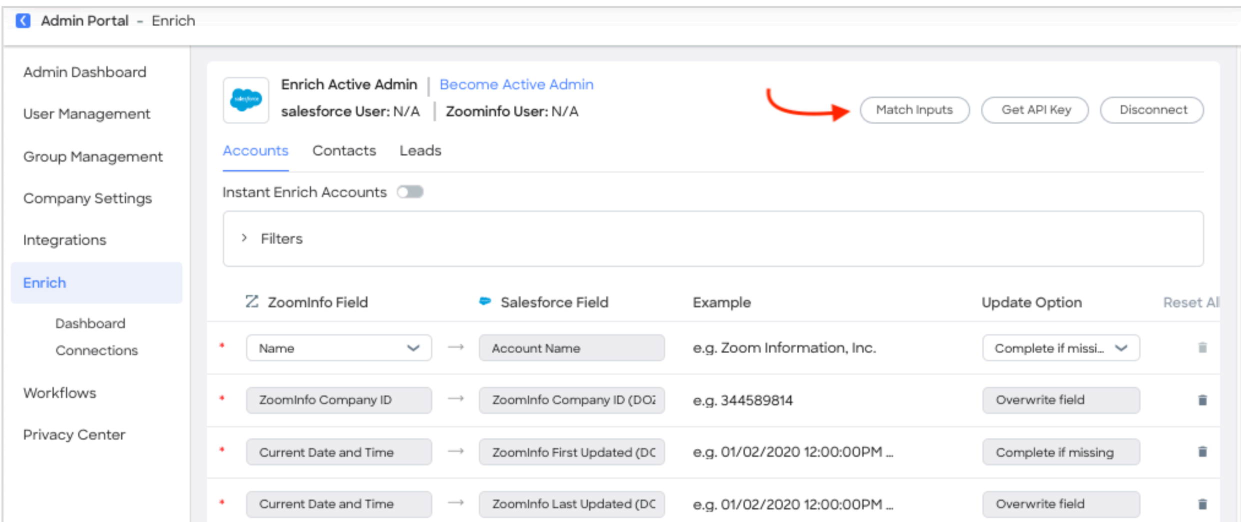
Customize Match Inputs

You can optionally include additional fields in your default match criteria using the **Customize Match Inputs** page.

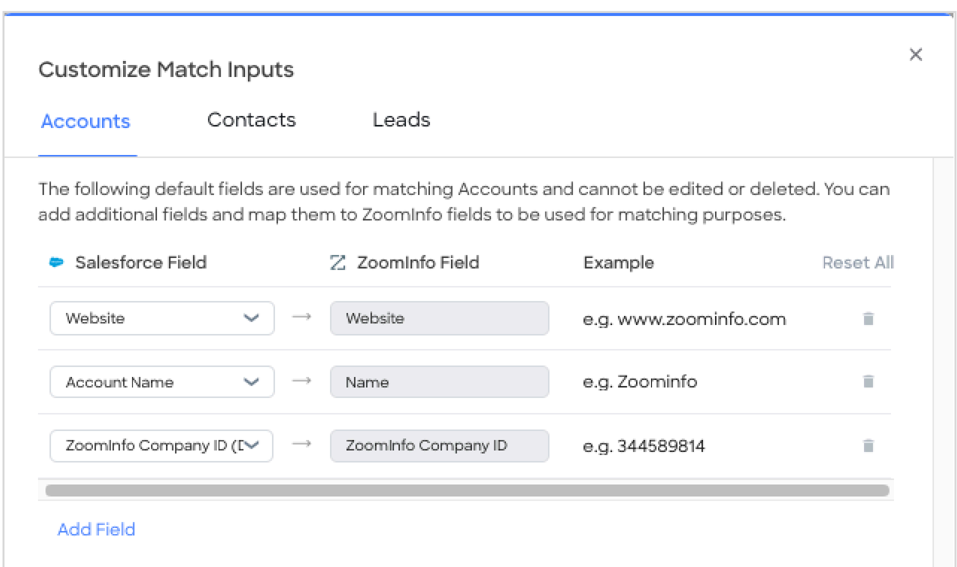
Each object type (e.g., Accounts, Contacts, and Leads) has a set of default fields that ZoomInfo uses to match in Salesforce. Although you cannot change the default ZoomInfo fields, you can include additional ZoomInfo fields on which to match - giving you more data accuracy control when enriching records in Salesforce.

To customize match inputs for your Enrich object types:

1. Click **Match Inputs** to view your current match inputs.



The **Customize Match Inputs** page includes a tab for each object type (e.g., **Accounts**, **Contacts**, and **Leads**).



2. Select the object type you want to customize. You cannot remove or edit the default match inputs, but you can include additional match inputs.
3. Click **Add Field** to select an additional field as a match input and map it to a corresponding field in Salesforce.
4. Click **Save**.

You can use the **Customize Match Inputs** page at any time to include additional match inputs or remove inputs that you've previously added. To return to the default match inputs, click **Reset All**.

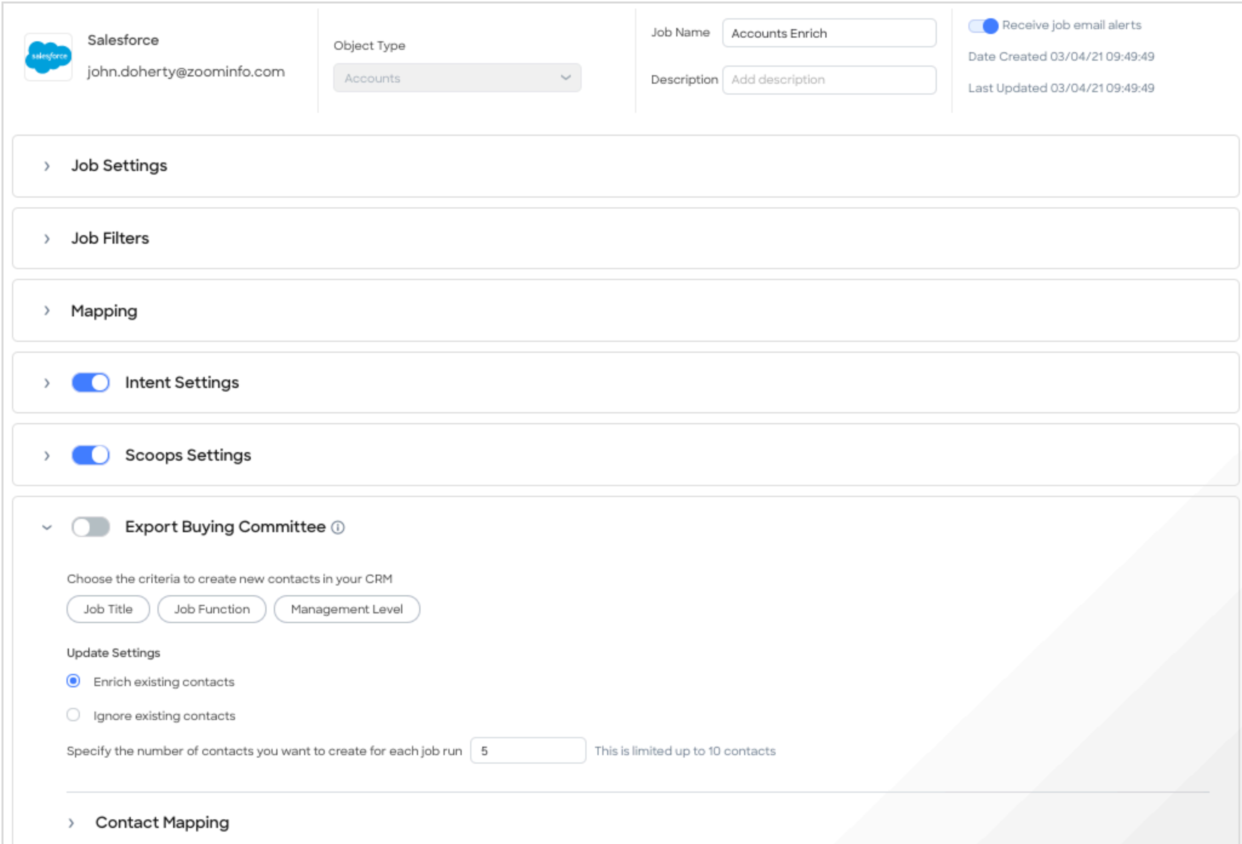
After your job is created successfully, you should see the new job listed in your Jobs table. You can enable or disable jobs by toggling the **Status** slider.

Export Buying Committee

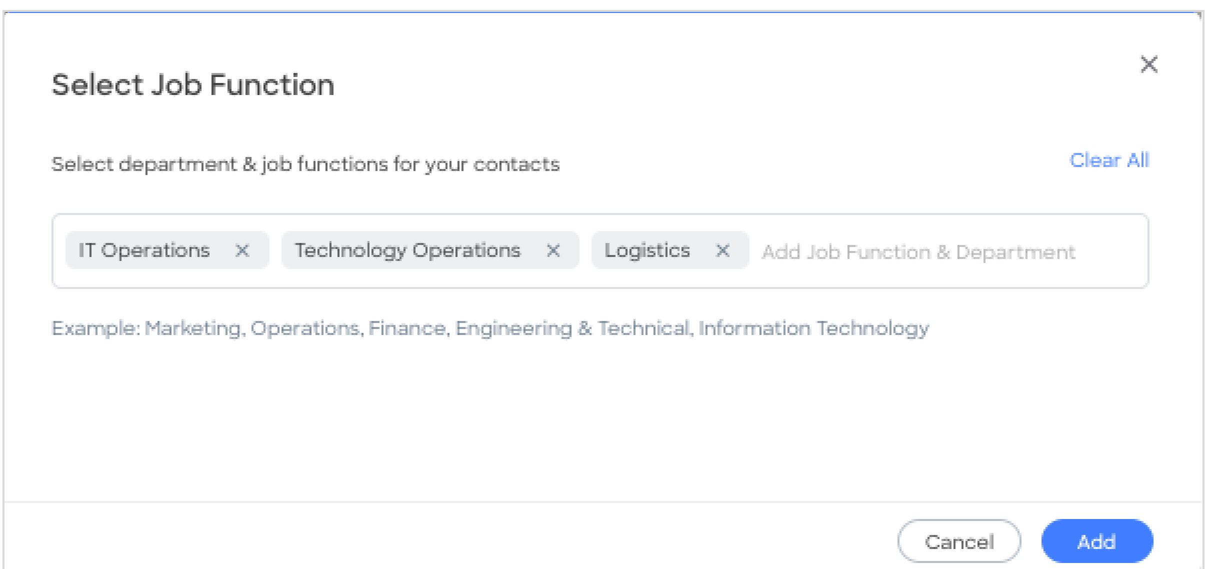
When configuring a Scheduled Enrich job for the Accounts object type, use the Export Buying Committee section to define the **Job Title**, **Job Function** and **Management Level** for contacts that represent your desired buying committee. These contacts will be exported and enriched in Salesforce when you export an account.

- The **Job Title**, **Job Function** and **Management Level** criteria categories are joined using an AND operator, meaning that contacts must match all selected criteria categories.
- Choices within each of these criteria categories are joined with an OR operator For example, if you select **VP** and **Director** within the **Management Level** category, you'll get both VP and Director contacts in your results.
- A credit is charged for each contact exported or enriched.
- Because this process is asynchronous, you should expect a short delay between job completion and when contacts are created in Salesforce.

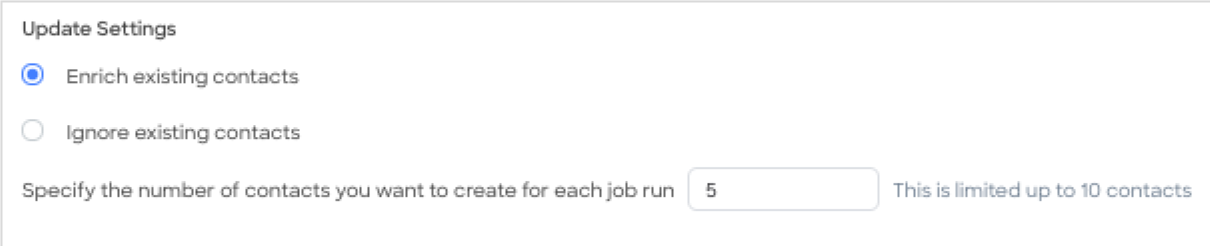
You can configure your Export Buying Committee settings when configuring a Scheduled Enrich job for the **Accounts** object type.



For example, click **Job Function** to define one or more representative job functions. Each job function you select within Job Function (e.g., IT Operations, Technology Operations and Logistics) will be joined with an OR operator.

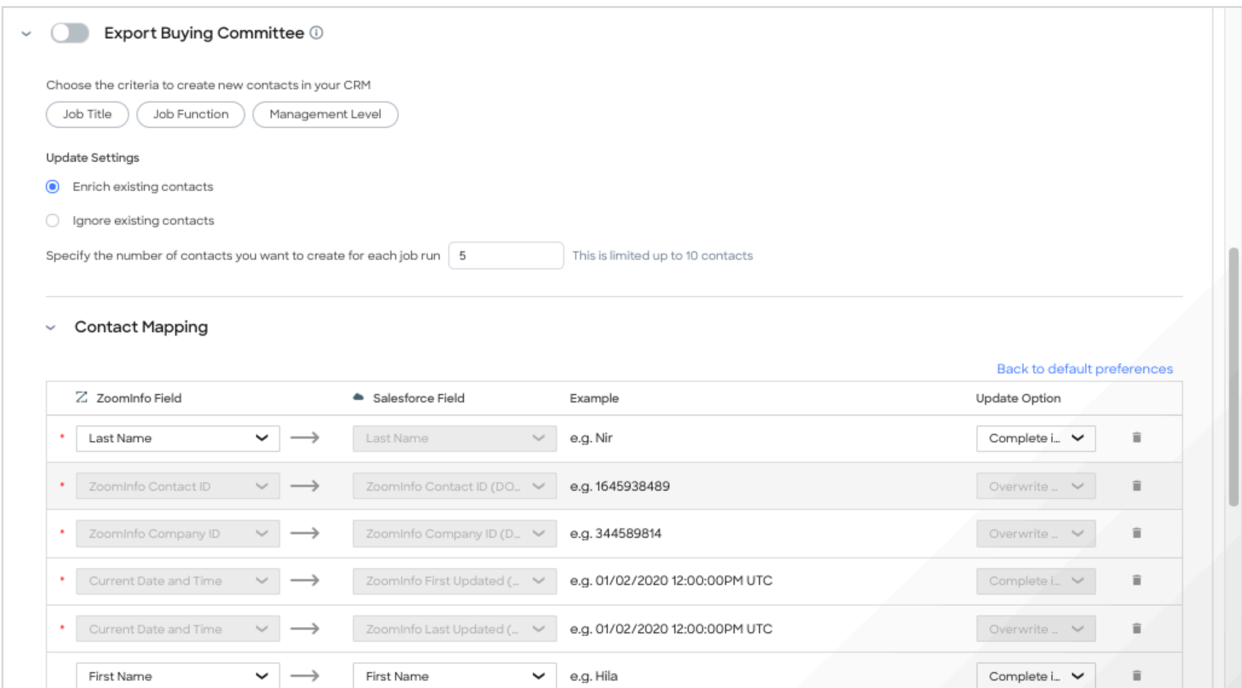


Use the **Update Settings** section to fine tune your job.



- Choose to enrich or ignore existing contacts. As a best practice, choose **Ignore existing contacts** to prioritize net new contact creation.
- You can set a hard limit (up to 10 contacts) for the number of contacts created per account. Each contact exported or enriched will consume one credit.

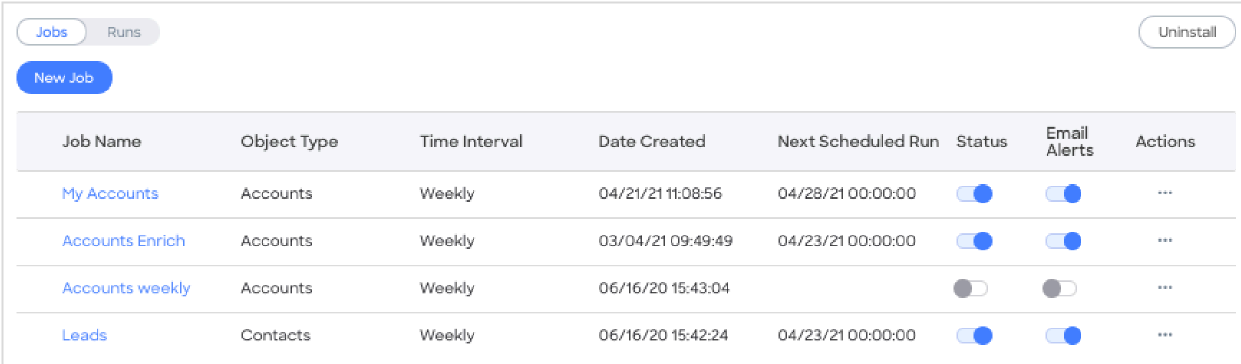
Finally, the **Export Buying Committee** section includes its own **Contact Mapping** section, letting you specify how contact fields are mapped to corresponding Salesforce fields.



Verify and Save

Click **Verify and Save** to finish creating the job. Any errors with job configuration will display.

After your job is created successfully, you should see the new job listed in your Jobs table. You can enable or disable jobs by toggling the Status slider.


Jobs Runs Uninstall

New Job

Job Name	Object Type	Time Interval	Date Created	Next Scheduled Run	Status	Email Alerts	Actions
My Accounts	Accounts	Weekly	04/21/21 11:08:56	04/28/21 00:00:00			···
Accounts Enrich	Accounts	Weekly	03/04/21 09:49:49	04/23/21 00:00:00			···
Accounts weekly	Accounts	Weekly	06/16/20 15:43:04				···
Leads	Contacts	Weekly	06/16/20 15:42:24	04/23/21 00:00:00			···

ZoomInfo Custom Object

You can utilize a custom object called "ZoomInfo" to capture all possible data fields available to you in default mapping without having to map every field in custom mapping settings.

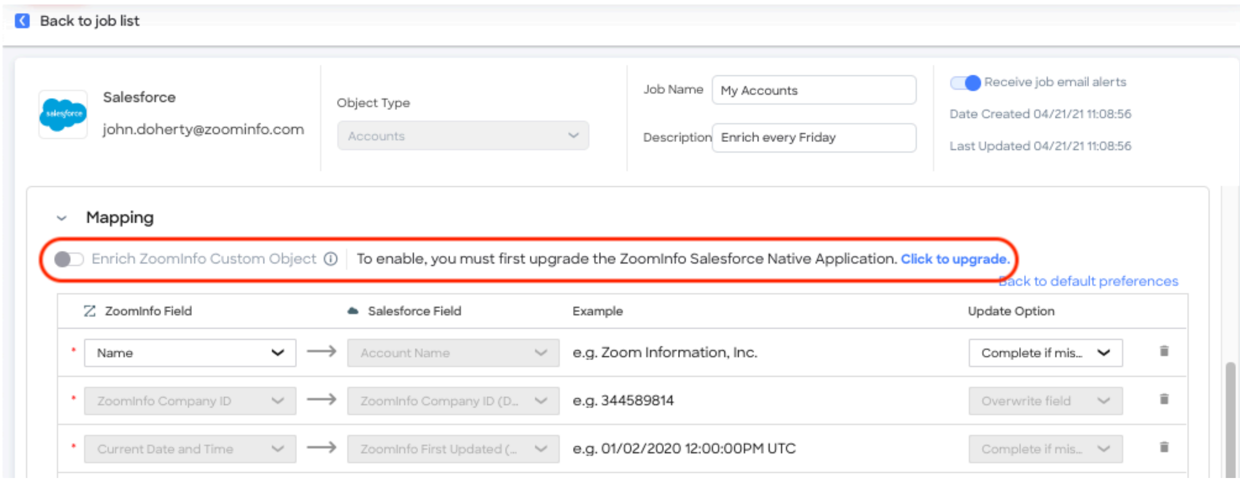
By using the custom object, you'll continue to get the ZoomInfo data you want in your Salesforce records custom mapping settings while also having access to the full data for Contact and Company records you've purchased - without expending any additional credits.

Once you enable the ZoomInfo custom object, a Salesforce admin can modify Account, Contact, and Lead pages to include a related list that houses the custom object, enabling users to easily explore the complete ZoomInfo data for that object.

Before configuring this feature, install or upgrade the ZoomInfo Sales Native Application to version 1.33 or higher from the Salesforce Appexchange.

Once you've successfully installed or upgraded the app:

1. Go to **Admin Portal > Integrations**.
2. Click **Connect Enrich**.
3. Under **Scheduled Enrich**, click **Manage** on the Salesforce tile.
4. Click the **Mapping** tab.
5. Select an existing job or configure a **New Job**.
6. Expand the **Mapping** section.
7. Enable the **ZoomInfo Custom Object Export** toggle for the desired object types (Accounts, Contacts, Leads).



8. Ask your Salesforce admin to add the ZoomInfo custom object to a related list on corresponding Account, Contact, and Lead pages in Salesforce.

Enrich Intent and Scoops

If your organization has access to ZoomInfo Intent and Scoops data, you can choose to enrich your Salesforce accounts with this data.

Note the following considerations:

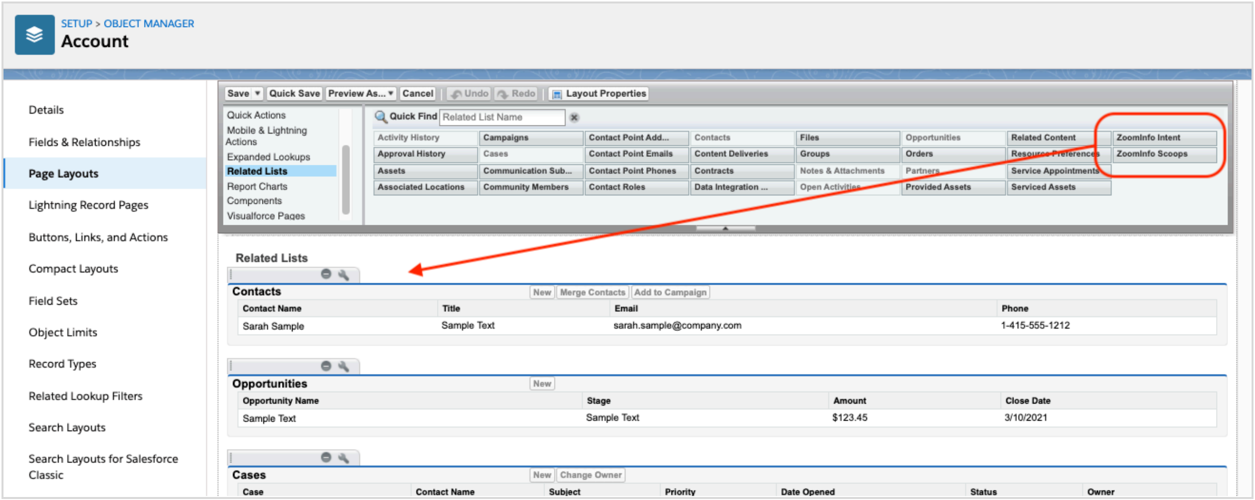
- Intent and Scoops from the past 30 days are enriched in Salesforce.
- For Account Enrich jobs that include Intent and Scoops, the process for enriching the Intent and Scoops data is separate from other Account data processed with the job. There may be a delay between when an Enrich job is completed, and when the Scoops and Intent data is enriched in Salesforce.
- Enriching Intent and Scoops will incur separate API calls.
- When viewing the Enrich dashboard, Scoops and Intent data statistics are currently not included.

Configure Custom Objects

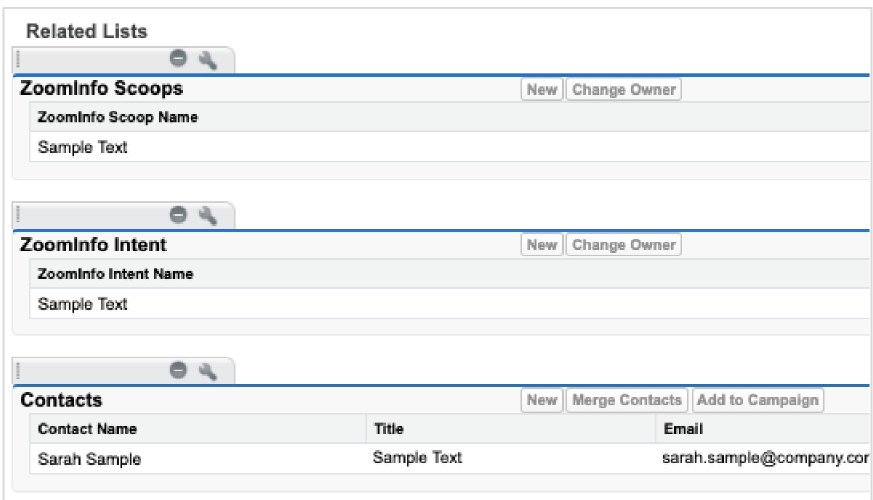
Intent and Scoops are exported to corresponding custom objects included with the ZoomInfo Sales Native Application package.

A Salesforce admin can embed these custom objects in the Account view to make the data visible to users by doing the following:

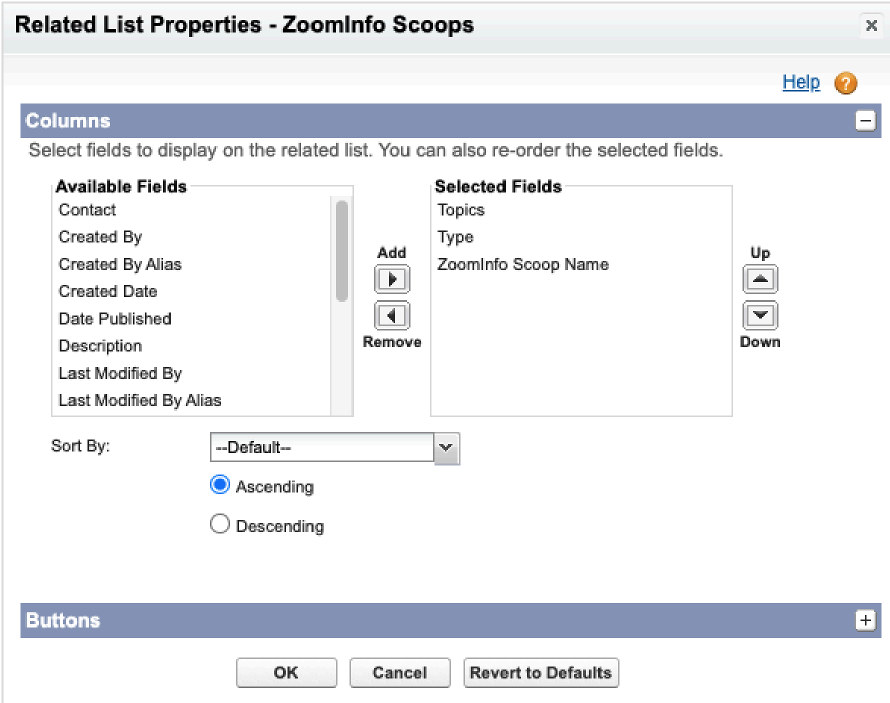
1. Edit the **Page Layout** for the **Account** view.

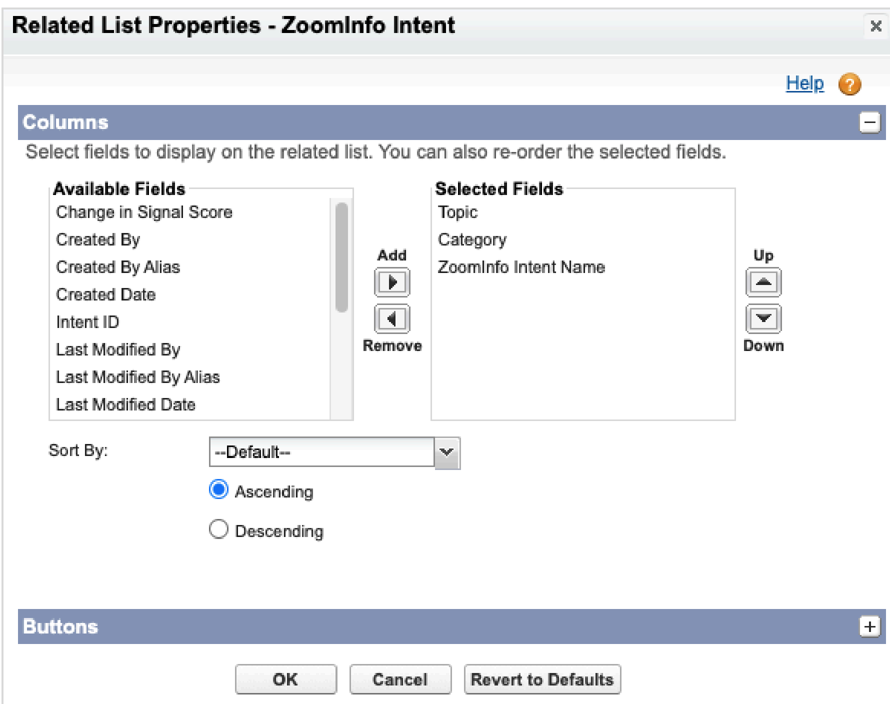


2. From the **Related Lists** section, drag the **ZoomInfo Intent** and **ZoomInfo Scoops** objects into the **Related Lists** layout.



3. To get detailed information on this record, click the wrench icon and add **Topics & Type** under the **ZoomInfo Scoops Related List** and **Topic & Category** under the **ZoomInfo Intent Related List**.



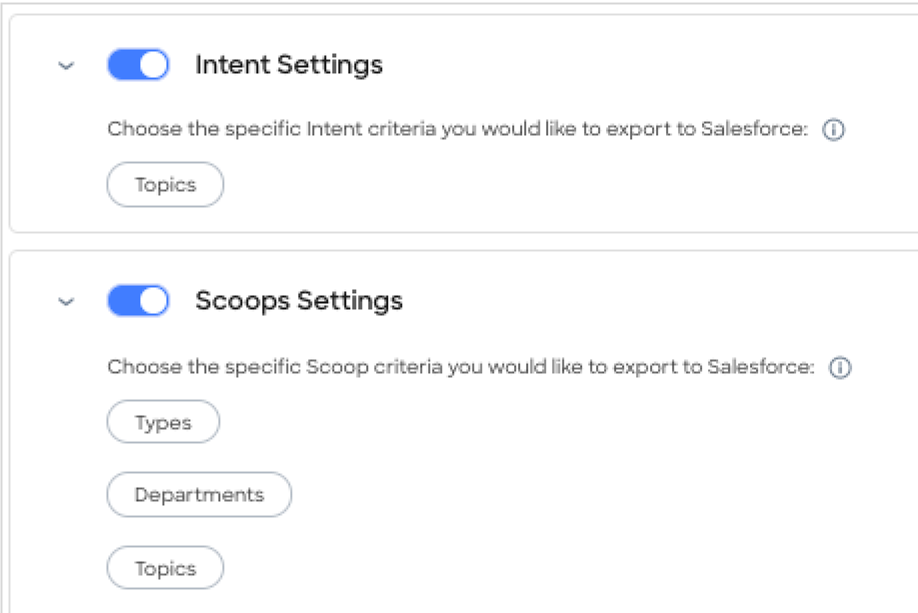


4. Click **Save**. Once Enrich jobs are processed, users viewing an Account will show Intent and Scoops information in these sections.

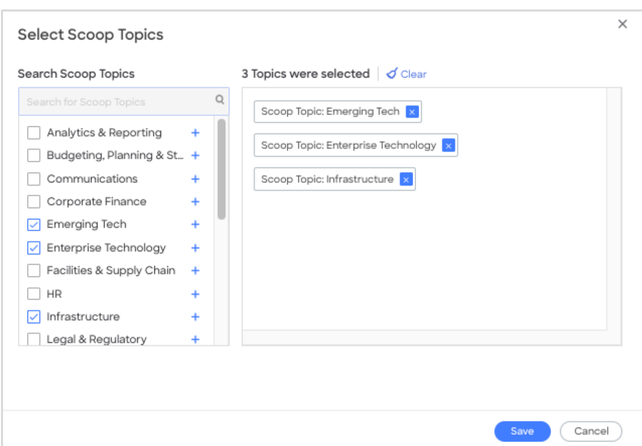
Enable Intent and Scoops Enrich

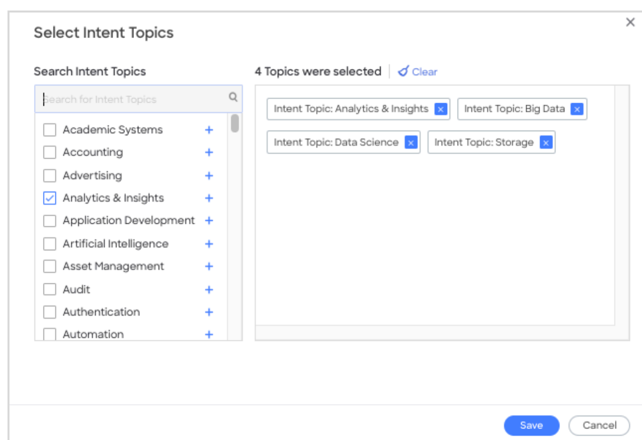
As an admin configuring a Scheduled Enrich job for Accounts in Salesforce:

1. Select the **Accounts** object type.

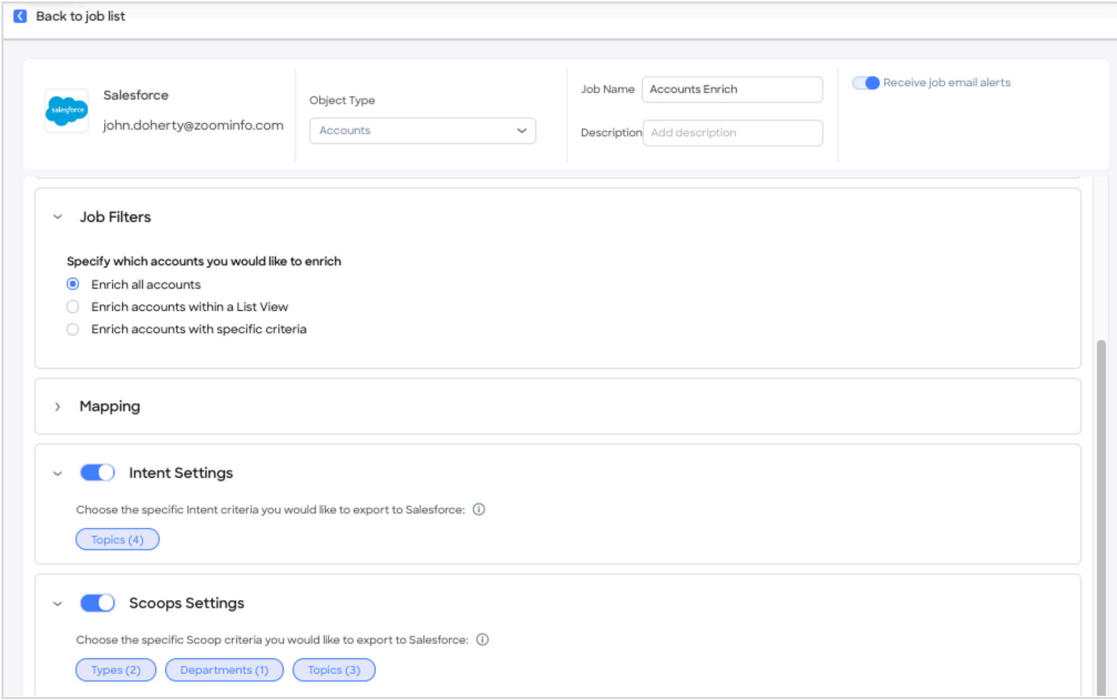


2. Enable the toggle for Intent and/or Scoops and select criteria for the topics you're interested in.



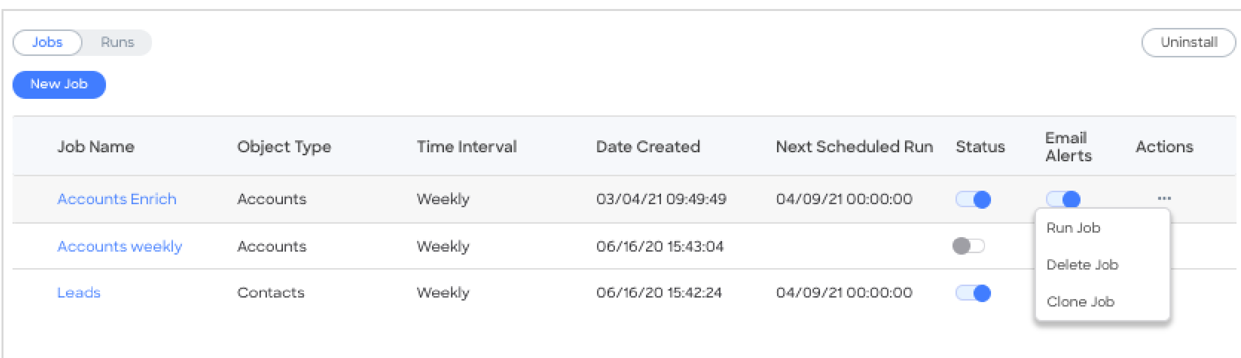


3. Click **Verify & Save**.



Manage Jobs

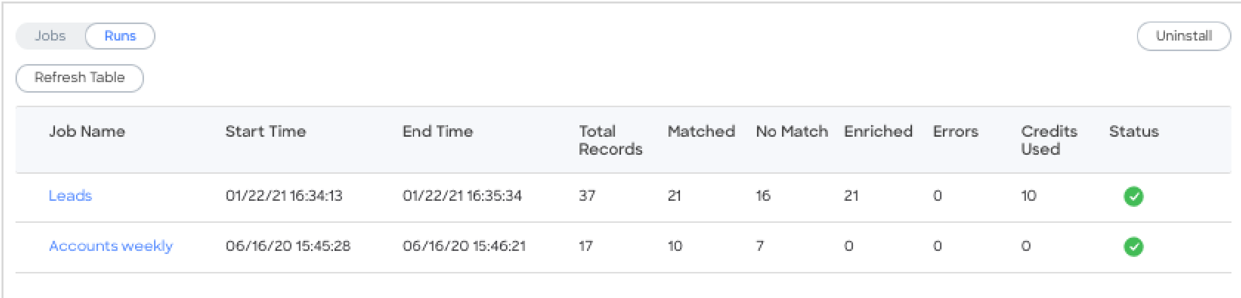
To run, clone, or delete a job, click the **Actions (...)** menu and select the desired action.



View Job Runs

Each run of your Enrich Jobs will appear in the **Runs** table. Runs are created as soon as a job is initiated. Check the **Runs** table to view the status of jobs currently in progress and a historical list of completed runs.

1. Click **Runs**.



Job Name	Start Time	End Time	Total Records	Matched	No Match	Enriched	Errors	Credits Used	Status
Leads	01/22/21 16:34:13	01/22/21 16:35:34	37	21	16	21	0	10	
Accounts weekly	06/16/20 15:45:28	06/16/20 15:46:21	17	10	7	0	0	0	

2. Review the run information.

Manage the Connection

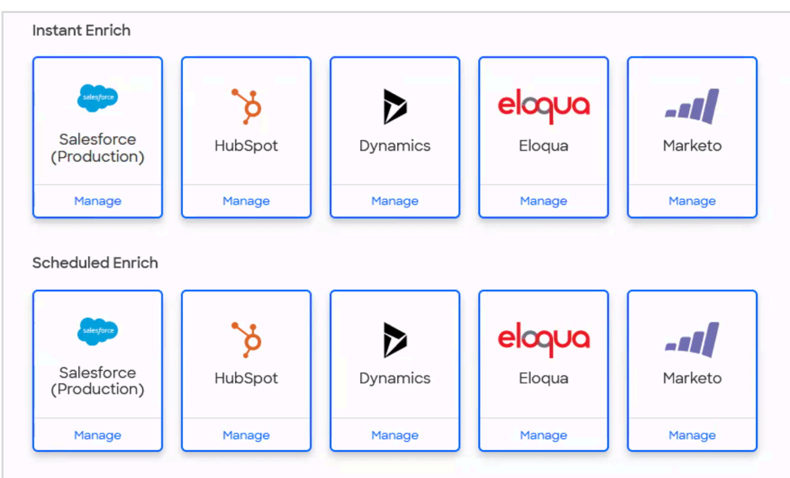
This section describes how you can manage the connection over time, including changing the Enrich Active Admin (for example, due to a departure or re-org), or disconnecting the Enrich integration.

Change Enrich Active Admin

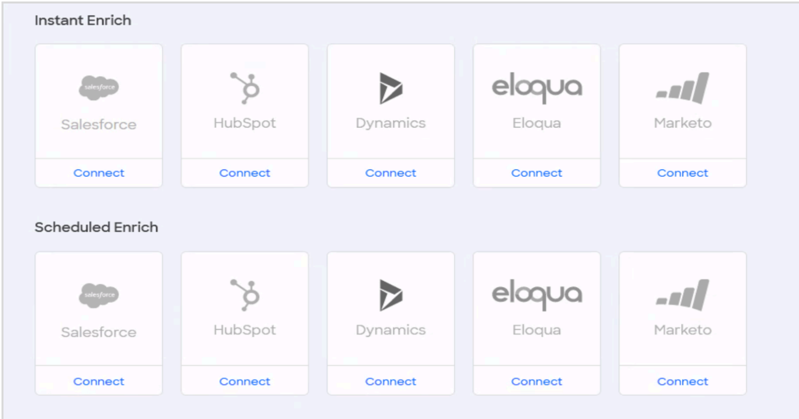
Enrich administrators must have full administrative privileges in Salesforce. The Enrich administrator must also have an Admin Portal seat on the ZoomInfo platform.

To change the Active Admin for Enrich:

1. Ensure you are logged in to Salesforce as an admin with full privileges.
2. Login to ZoomInfo and select **Admin Portal** from the waffle menu.
3. On the left menu click **Integrations > Connect Enrich**. The **Connections** page displays.
4. Under **Scheduled Enrich**, find the tile for Salesforce and click **Manage**.



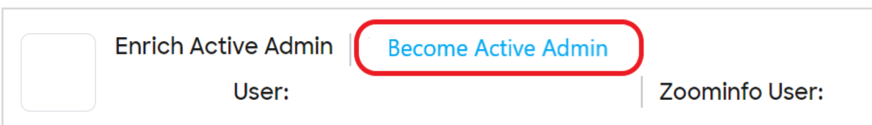
Note: If the tile is not in color and says **Connect** you will need to follow the prompts for connecting your ZoomInfo Admin seat to your Salesforce instance.



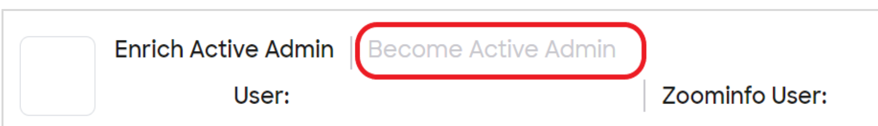
For additional information on how to connect Enrich for Salesforce see the [ZoomInfo Integrations Resource Matrix].

5. After clicking **Manage** you are taken to the **Jobs** page in Scheduled Enrich. At the top of the page you will see **Enrich Active Admin**.

6. If you are not the current Active Admin for Enrich the link will be blue. Click **Become Active Admin** and follow the prompts to become the Active Admin.



If **Become Active Admin** is gray it indicates that you are the current Enrich admin. Hover your mouse over **Become Active Admin** to confirm.



7. The Salesforce User shows the email address of the current Salesforce administrator connected to Enrich.

8. ZoomInfo User shows the ZoomInfo administrator logged into the ZoomInfo platform through the Admin Portal.

Disconnect ZoomInfo From Salesforce

If you want to disconnect ZoomInfo Enrich from Salesforce, disable any Enrich jobs using the **Status** toggle and then click **Disconnect** in the top right of the page.

Instant Enrich

Receive immediate insights into contacts and companies as they are created in your Salesforce environment by enabling instant enrichment. You configure Instant Enrich for Leads, Contacts, and Accounts independently.

Before You Begin

Before configuring Scheduled or Instant Enrich, install the ZoomInfo for Salesforce Native Application in your Salesforce instance.

Authentication Setup (v1.50)

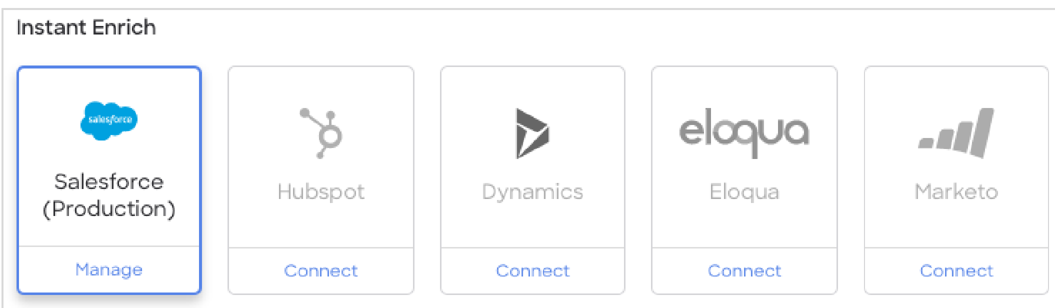
Configure ZoomInfo Authentication Credentials

Starting with version 1.50, ZoomInfo uses a secure custom object to store authentication credentials for **Instant Enrich** functionality, providing enhanced security through proper permission controls.

Note: This authentication setup is specifically required for Instant Enrich features. If your organization does not have an Enrich subscription, you can skip this section.

Step 1: Retrieve Credentials

1. Log into your ZoomInfo Admin Portal
2. Navigate to **Admin Portal > Integrations > Salesforce Settings**
3. Copy your **Username** and **JWT Token** (private key)



Step 2: Configure Authentication Object

1. In Salesforce, go to **Setup**
2. Navigate to **Object Manager**
3. Search for and select **ZoomInfo Enrich Private Key**
4. *(Note: This is where administrators can review object access and define permissions)*
5. When ready to configure credentials:
    - Click the **App Launcher** (9-dot grid icon)
    - Search for **"ZoomInfo Enrich Private Key"**
    - Select the **"Enrich Private Key"** item
    - Edit the existing record (do not create a new record)
6. In the edit form:
    - **Username**: Paste the username from Step 1
    - **Private Key**: Paste the JWT token from Step 1
    - ⚠️ **Important**: Do NOT modify any pre-filled fields - this will cause authentication failures
7. Click **Save**

Step 3: Assign Permission Sets

1. In Salesforce Setup, navigate to **Users > Permission Sets**
2. For administrators managing authentication settings, also assign **ZoomInfo Admin Access**
3. Select **ZoomInfo Limited Access**
4. Click **Manage Assignments**
5. Choose your assignment method:
    - **Individual Users**: Click **Add Assignments** and select specific users
    - **Bulk Assignment**: Select multiple users and assign simultaneously
    - **Permission Set Groups**: Create/use groups for easier management

Step 4: Verification

Test Enrich functionality on a sample Account, Contact, or Lead record to confirm setup is successful.

Authentication Setup (v1.51+)

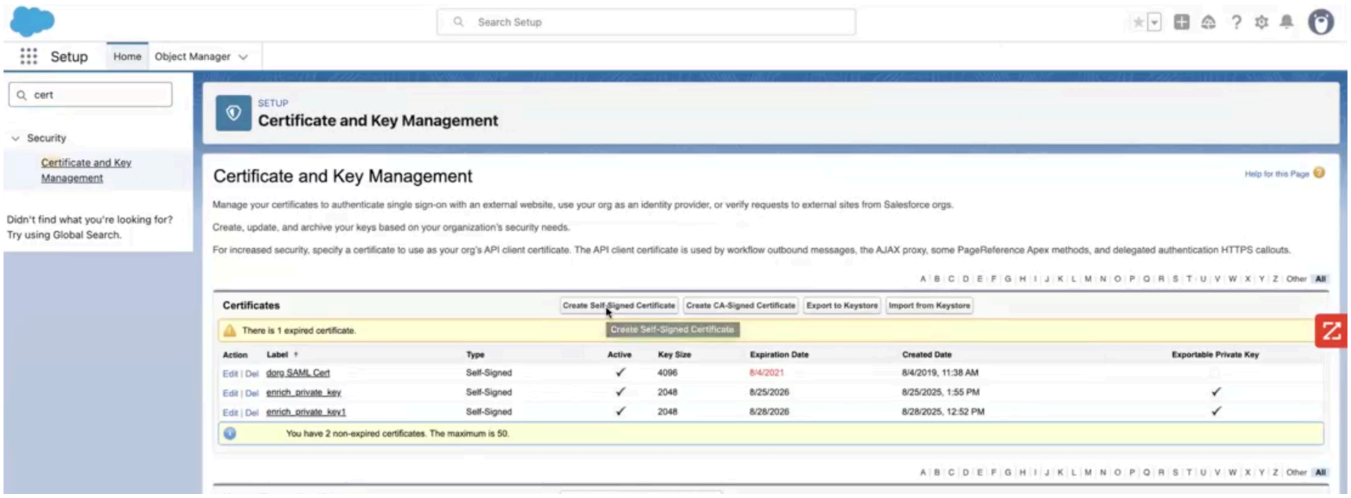
Configure Certificate-Based Authentication

Starting with version 1.51, ZoomInfo uses Salesforce Named Credentials with certificate-based authentication for enhanced security. This method prevents unauthorized access by restricting credential access to administrators with proper permissions.

Note: This authentication setup is specifically required for Instant Enrich features. If your organization does not have an Enrich subscription, you can skip this section.

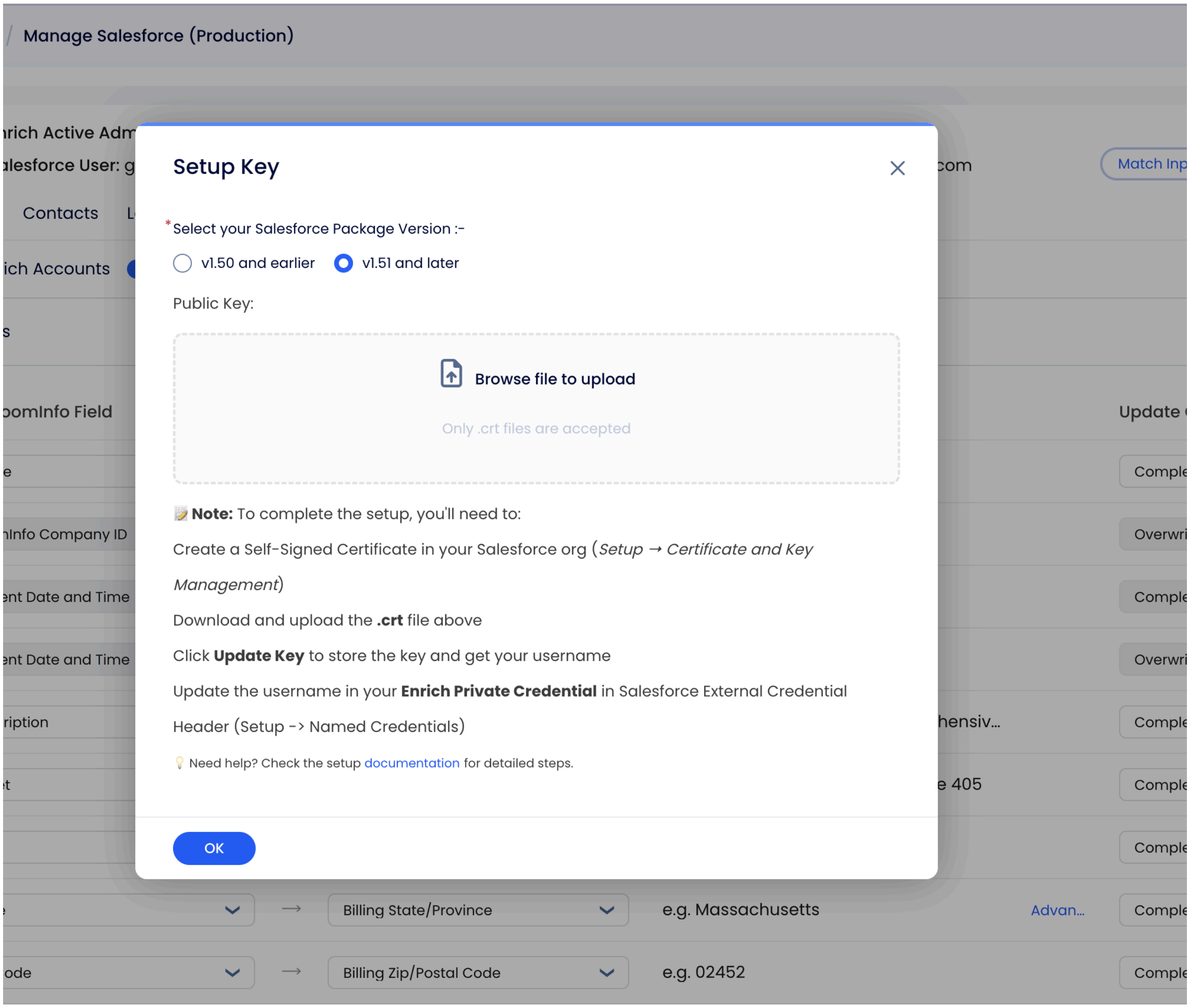
Step 1: Create Self-Signed Certificate in Salesforce

1. In Salesforce Setup, search for **Certificate and Key Management**
2. Click **Create Self-Signed Certificate**
3. Enter a descriptive label (e.g., "ZoomInfo Enrich Certificate")
4. Complete any additional fields as needed for your organization
5. Click **Save**
6. Locate your newly created certificate in the list
7. Click **Download Certificate** to download the public key file
    - Save this file - you'll upload it to ZoomInfo in the next step



Step 2: Upload Certificate to ZoomInfo Admin Portal

1. Log into your ZoomInfo Admin Portal
2. Navigate to **Integrations** > **Data Enrichment**
3. Locate the Salesforce connection
4. Click **Upload Certificate** (available in v1.51+)
5. Select the certificate file you downloaded in Step 1
6. After upload completes, **copy the username** displayed on screen
    - You'll need this username for Step 3

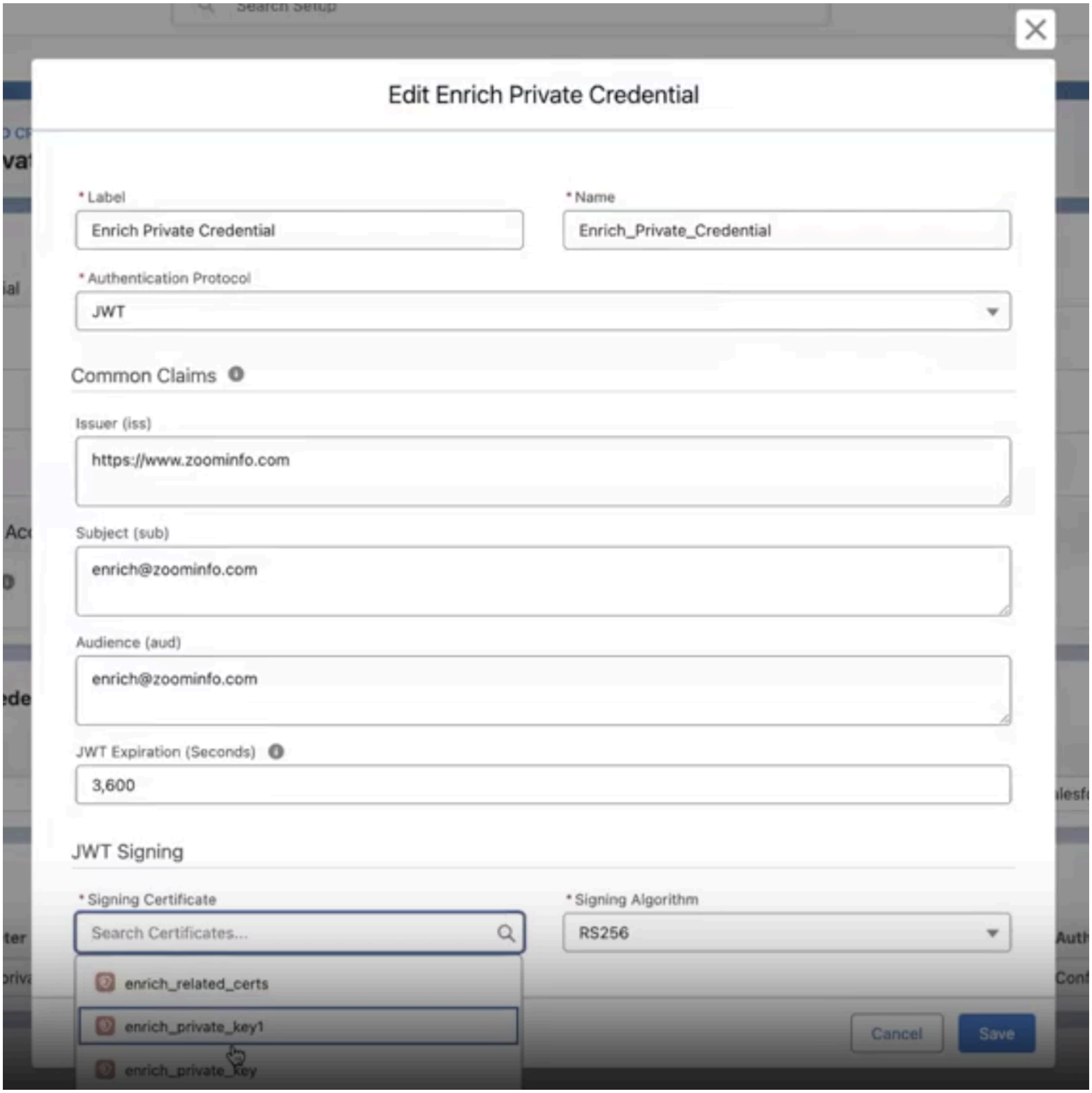


Step 3: Configure Named Credential and External Credential

The ZoomInfo app automatically creates the necessary Named Credential and External Credential objects during installation. You just need to configure them with your certificate and username.

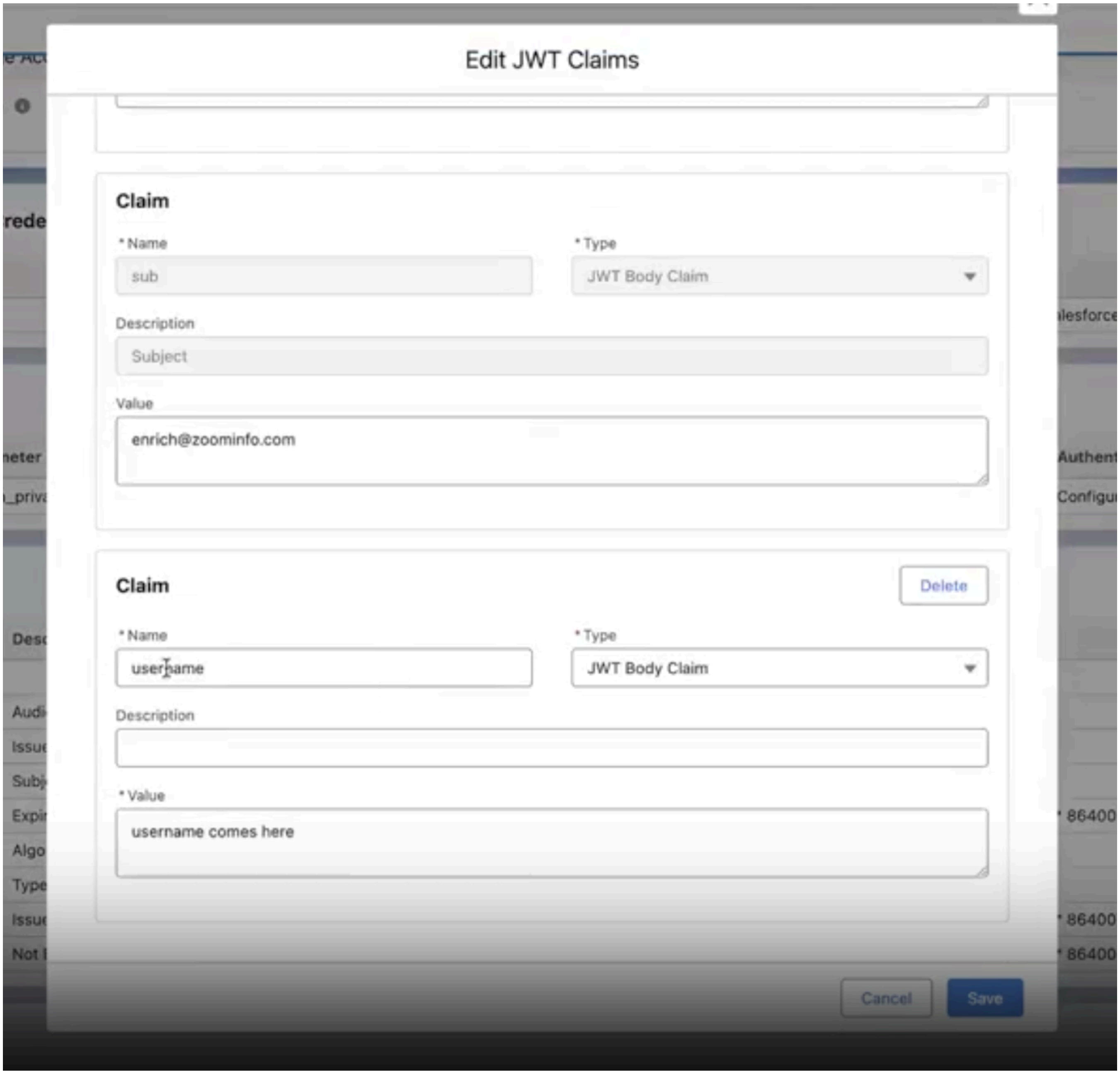
Configure External Credential:

1. In Salesforce Setup, search for **Named Credentials**
2. Click **External Credentials** tab
3. Click the **ZoomInfo Enrich Private Key** and click **Edit**
4. Under **Authentication Protocol**, select the certificate you created in Step 1
5. Click **Save**



Configure Named Credential Claims:

1. While still in **External Credentials**, find **ZoomInfo Enrich Private Key**
2. Find **JWT Claims** and click **Edit**
3. Enter the **username** you copied from Step 2
4. Click **Save**



Important: The certificate you created will expire after one year. When it expires, you'll need to create a new certificate and repeat this configuration process.

Step 4: Assign Permission Sets

All Salesforce users whose records need to be instantly enriched must have access to the "External/Named credential" on their profile, and the Enrich Limited Access permission set must be applied.

1. In Salesforce Setup, navigate to **Users** > **Permission Sets**
2. Select **ZoomInfo Limited Access**
3. Click **Manage Assignments**
4. Assign to users who need Enrich functionality
5. For administrators managing authentication settings, also assign **ZoomInfo Admin Access**

Step 5: Verification

Test Enrich functionality on a sample Account, Contact, or Lead record to confirm setup is successful.

Integrations Settings Configuration

You can configure your Salesforce integration settings, including export preferences, mapping, and filtering from the **Admin Portal** in either the ZoomInfo Sales platform or in Salesforce using the Native App.

Option 1: In the ZoomInfo Sales platform:

1. Go to **Admin Portal > Integrations**
2. On the **Connected** tab, find your Salesforce connection and click it.
3. Click **Edit settings**.

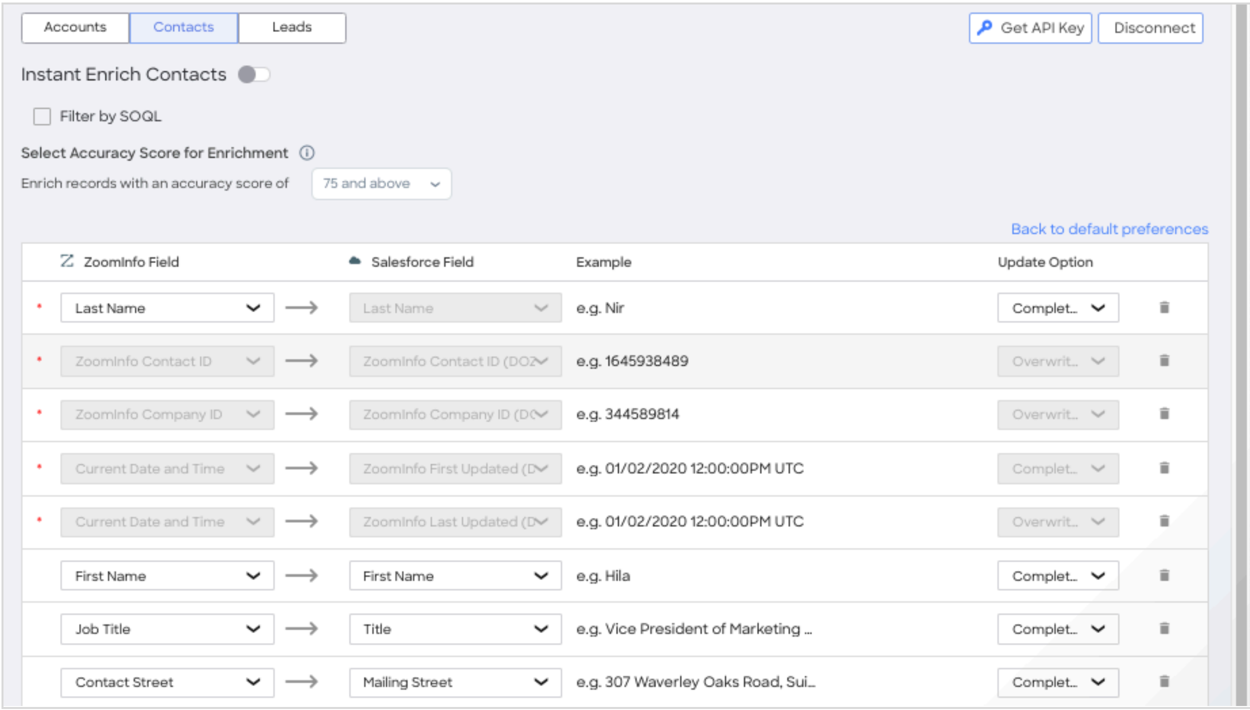
Option 2: In the Native App:

Go to **Admin Portal > Salesforce Settings**.

The configuration you make in either Admin Portal are applied to both the platform and the Native App. See the Salesforce Integration Guide for full details on connecting and configuring the integration for your organization.

Configure Instant Enrich

1. Click **Manage** under the Instant Enrich Salesforce tile.

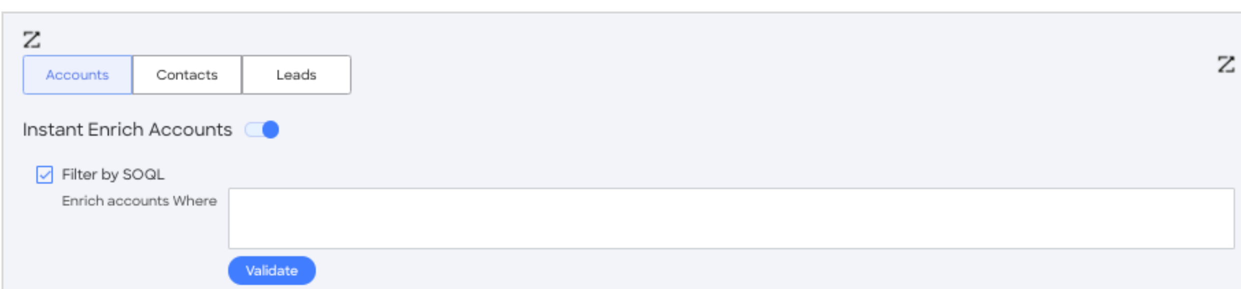


2. Select the object type you want to enrich (**Accounts**, **Contacts**, or **Leads**).

   For Contacts or Leads, you can control contact enrichment by Accuracy Score, ensuring you are only enriching contacts that meet your minimum business requirements. Matched records that are not enriched because they do not meet your minimum Accuracy Score will be marked as No Match with a No Match Reason of "Below selected Accuracy Score".

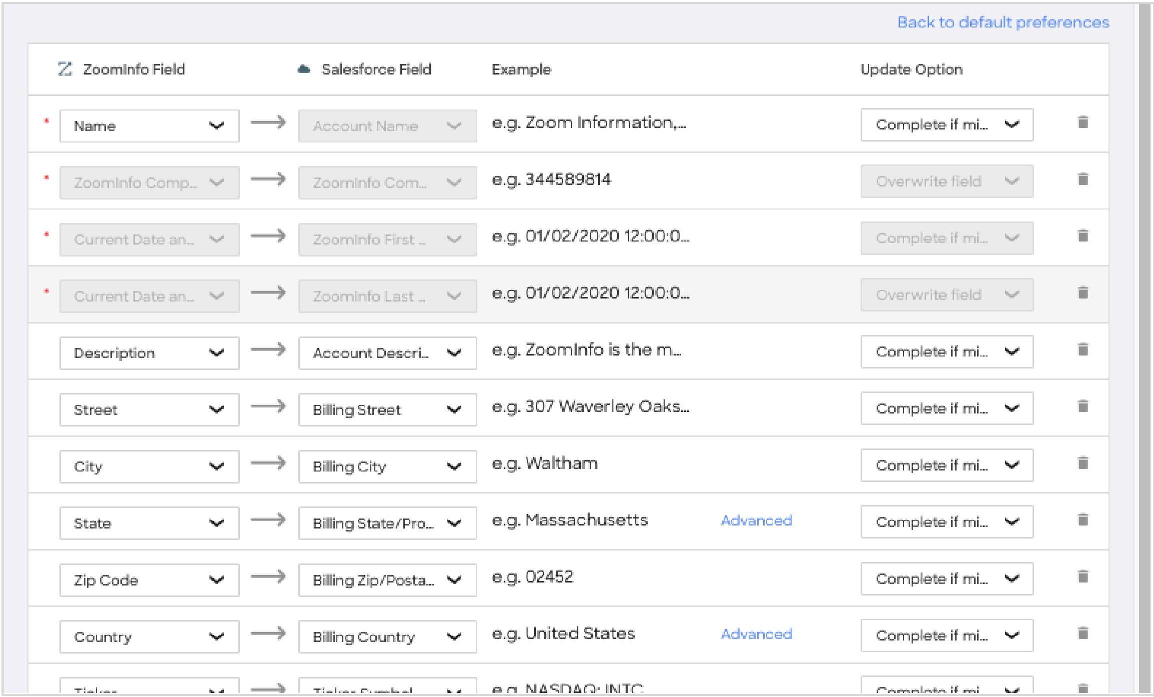
3. Enable or disable enrichment by clicking the **Instant Enrich <object_type>** toggle.

4. Optionally, select **Filter by SOQL** to add a Salesforce Object Query Language (SOQL) query to filter on. When a net new record is created in Salesforce, the filter is checked to determine whether the record should be enriched or not.



   A SOQL filter is useful in organizations with multiple sales teams, providing better control over which net new records in Salesforce are instantly enriched based on the filter.

5. Configure mapping to determine how ZoomInfo data will be captured.



ZoomInfo Field: Select the ZoomInfo data point you would like to return

Salesforce Field: Select the Salesforce field you would like to capture the specified data (supports custom fields, as well)

Update Option: Select whether you would like to overwrite existing data for complete if missing.

Important: ZoomInfo recommends the following:

- Work with your Salesforce administrator to understand field mapping and update options to ensure records are enriched as expected.
- Set all standard Salesforce fields to **Complete if missing** (this is the default state). Only select **Overwrite** for custom fields created specifically for ZoomInfo.
- **ZoomInfo Contact ID** and **Company ID** are unique identifiers for ZoomInfo contact and company records. You should create and map custom fields to these fields.

6. Click **Verify and Save**.

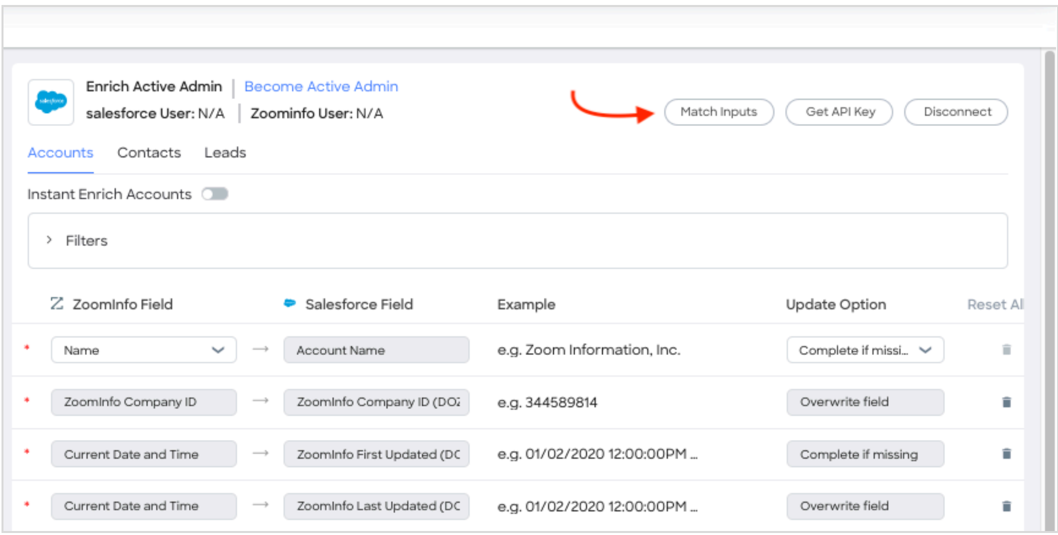
Customize Match Inputs

You can optionally include additional fields in your default match criteria using the **Customize Match Inputs** page.

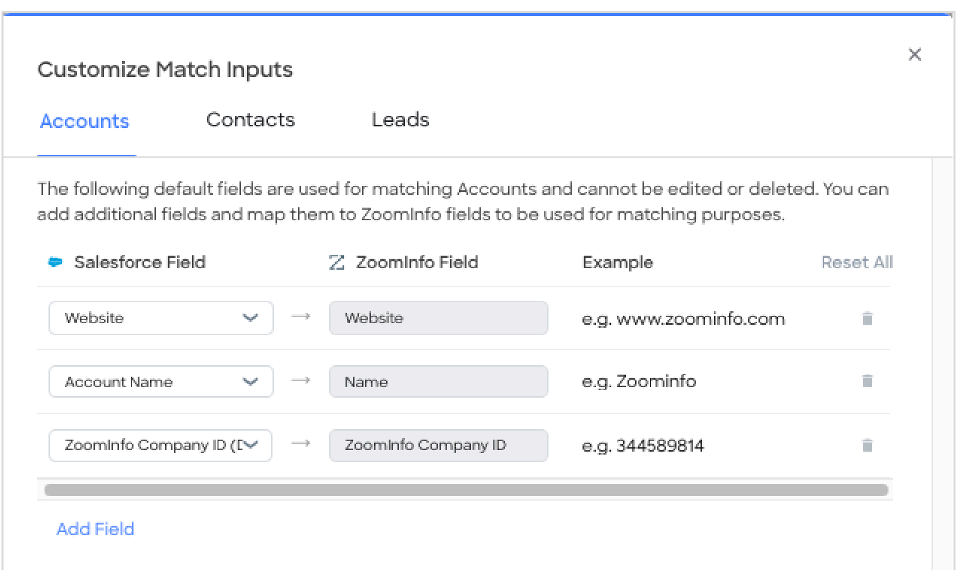
Each object type (e.g., **Accounts**, **Contacts**, and **Leads**) has a set of default fields that ZoomInfo uses to match in Salesforce. Although you cannot change the default ZoomInfo fields, you can include additional ZoomInfo fields on which to match - giving you more data accuracy control when enriching records in Salesforce.

To customize match inputs for your Enrich object types:

1. Click **Match Inputs** to view your current match inputs.



The Customize Match Inputs page includes a tab for each object type (e.g., **Accounts**, **Contacts**, and **Leads**).



2. Select the object type you want to customize. You cannot remove or edit the default match inputs, but you can include additional match inputs.

3. Click **Add Field** to select an additional field as a match input and map it to a corresponding field in Salesforce.

4. Click **Save**.

You can use the **Customize Match Inputs** page at any time to include additional match inputs or remove inputs that you've previously added. To return to the default match inputs, click **Reset All**.

Manage the Connection

This section describes how you can manage the connection over time, including changing the Enrich Active Admin (for example, due to a departure or re-org), or disconnecting the Enrich integration.

Change Enrich Active Admin

Enrich administrators must have full administrative privileges in Salesforce. The Enrich administrator must also have an Admin Portal seat on the ZoomInfo platform.

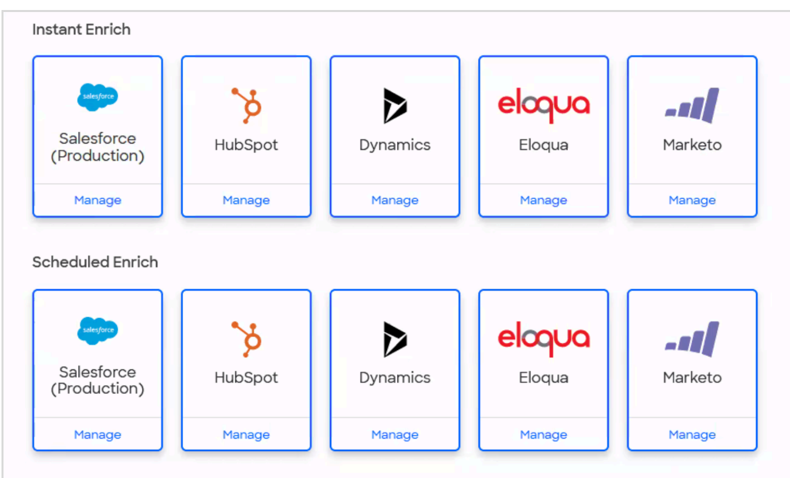
To change the Active Admin for Enrich:

1. Ensure you are logged in to Salesforce as an admin with full privileges.

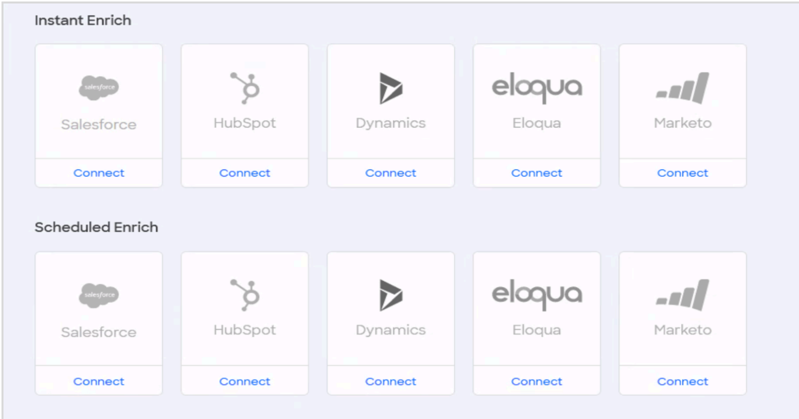
2. Login to ZoomInfo and select **Admin Portal** from the waffle menu.

3. On the left menu click **Integrations > Connect Enrich**. The **Connections** page displays.

4. Under **Instant Enrich**, find the tile for Salesforce and click **Manage**.

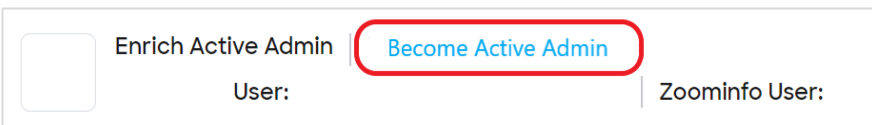


Note: If the tile is not in color and says **Connect** you will need to follow the prompts for connecting your ZoomInfo Admin seat to your Salesforce instance.

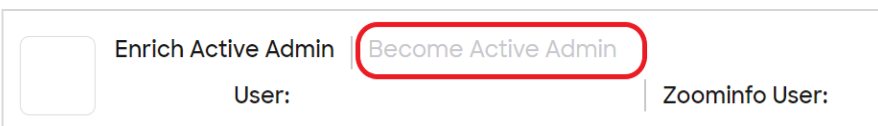


For additional information on how to connect Enrich for Salesforce see the ZoomInfo Integrations Resource Matrix.

5. At the top of the page you will see **Enrich Active Admin**. If you are not the current Active Admin for Enrich the link will be blue. Click **Become Active Admin** and follow the prompts to become the Active Admin.



If **Become Active Admin** is gray it indicates that you are the current Enrich admin. Hover your mouse over **Become Active Admin** to confirm.



6. The Salesforce User shows the email address of the current Salesforce administrator connected to Enrich.

7. ZoomInfo User shows the ZoomInfo administrator logged into the ZoomInfo platform through the Admin Portal.

Disconnect ZoomInfo From Salesforce

If you want to disconnect ZoomInfo Enrich from Salesforce, disable any Enrich jobs using the **Status** toggle and then click **Disconnect** in the top right of the page.

Enrich Dashboard

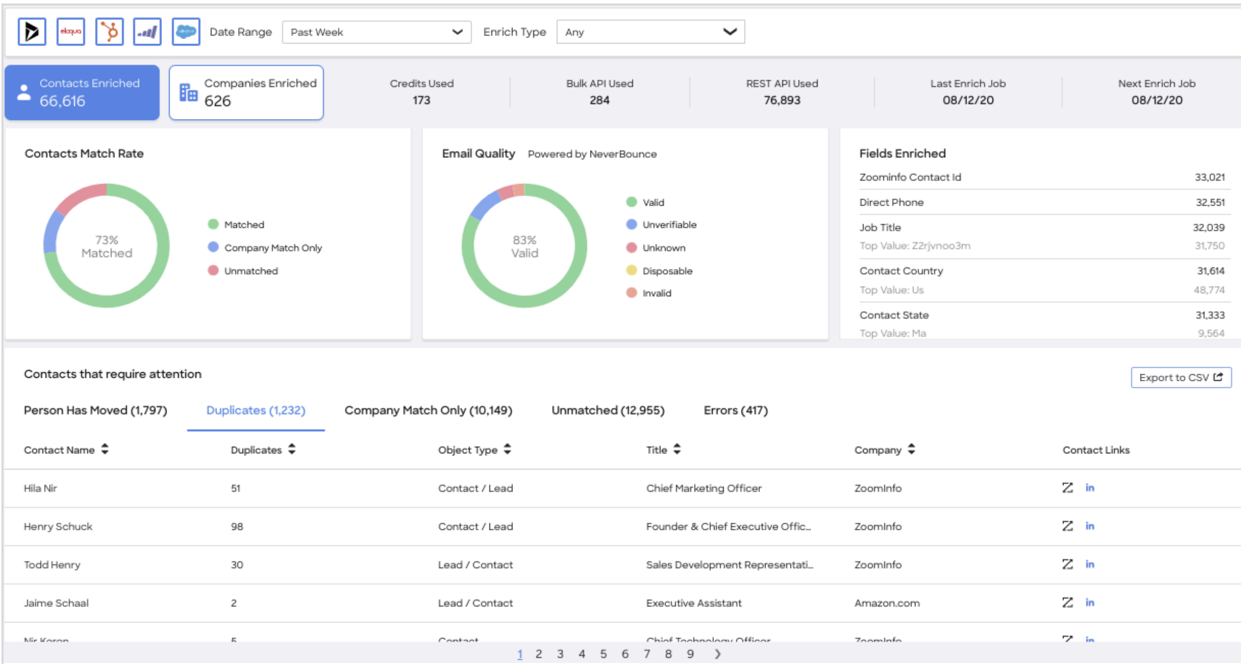
As a ZoomInfo admin, the Enrich dashboard gives you a detailed graphical view of how Scheduled Enrich has impacted the quality and depth of data for your connected CRM and marketing automation integrations.

Access the Enrich Dashboard

1. Go to **Admin Portal > Usage > Enrich Dashboard**.

   The default view for dashboard data is **Any**, which includes both Scheduled and Instant Enrich.

2. Use the **Enrich Type** dropdown to view Scheduled Enrich or Instant Enrich data.

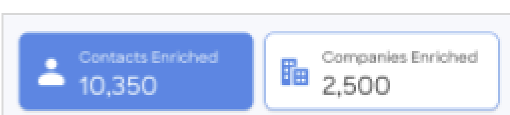


Using the Dashboard

This section describes the dashboard features and actions you can take.

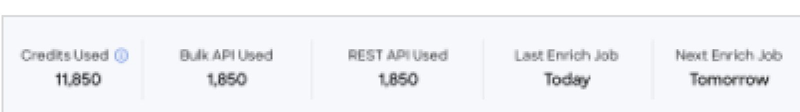
View Contact and Company Enrich Statistics

Contacts Enriched and **Companies Enriched** provides the total number of contacts and companies enriched for the selected integrations.



View Credit and API Usage

The dashboard includes the number of **Credits Used**, **Bulk API Used**, and **REST API Used**. It also shows when the **Last Enrich Job** ran, and when the **Next Enrich Job** is scheduled.

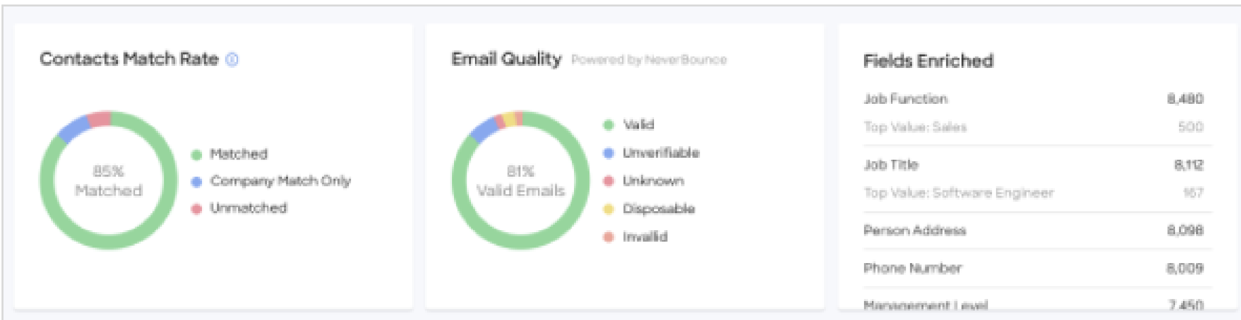


View Match Rate, Email Quality and Fields Enriched

You can view the overall **Contact Match Rate** (broken down by **Matched**, **Company Match Only**, or **Unmatched**).

If you are using NeverBounce, **Email Quality** shows you how NeverBounce has impacted your email delivery success and breaks the data down by NeverBounce status.

Finally, **Fields Enriched** provides a descending list of fields enriched, including the actual value that was most often enriched within some fields.



For **Email Quality**, the values are:

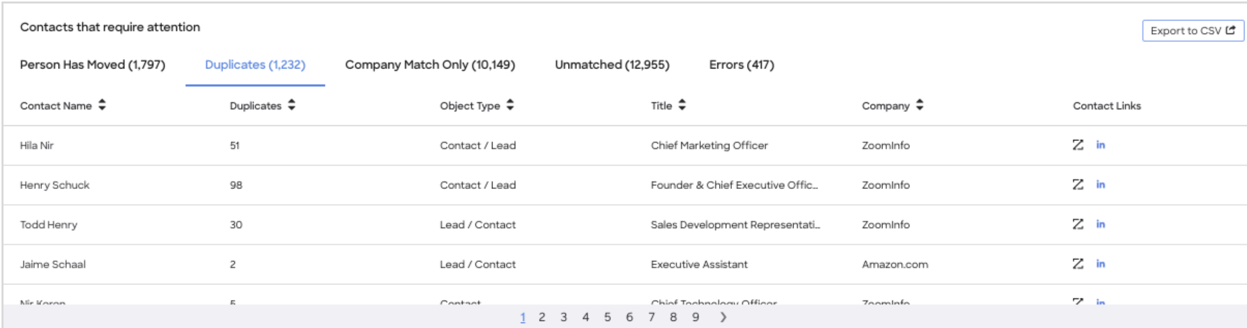
- **Valid**: Email exists and has been verified for safe sending.
- **Invalid**: Email does not exist and is not safe for sending.
- **Unverifiable**: No definitive way to determine whether an email is valid or invalid. If you have a third-party email provider that requires a low bounce rate, it is not safe to send.
- **Disposable**: Email is temporary or fake and is not safe for sending.
- **Unknown**: Unable to determine an email's status. Domain and/or server is not responding to our request. If you have a dedicated email server with your own IPs, it usually is safe for sending. If you use a third-party email provider, it is not safe for sending.

For **Fields Enriched**, the top value indicates the most enriched data point within each field. In the example above, the top value for Job Title is Software Engineer.

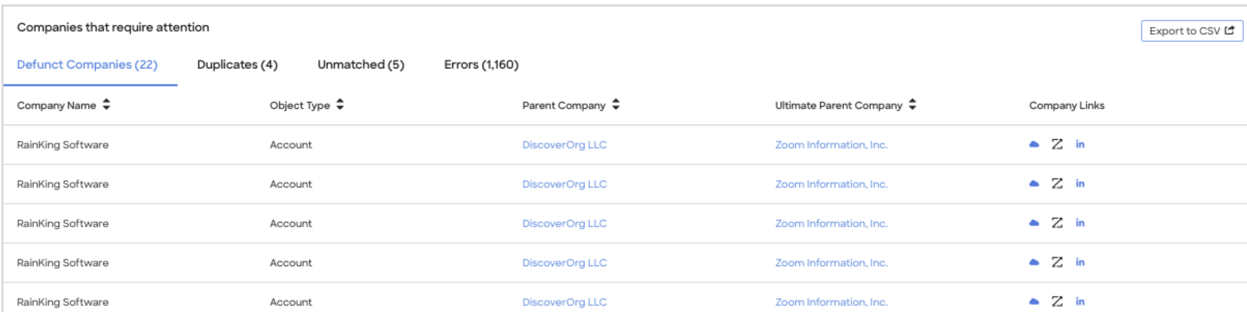
Work with Contacts or Companies Requiring Attention

Click **Contacts Enriched** or **Companies Enriched** to toggle information about contacts or companies that can help you rectify discrepancies.

Contacts that Require Attention



Companies that Require Attention



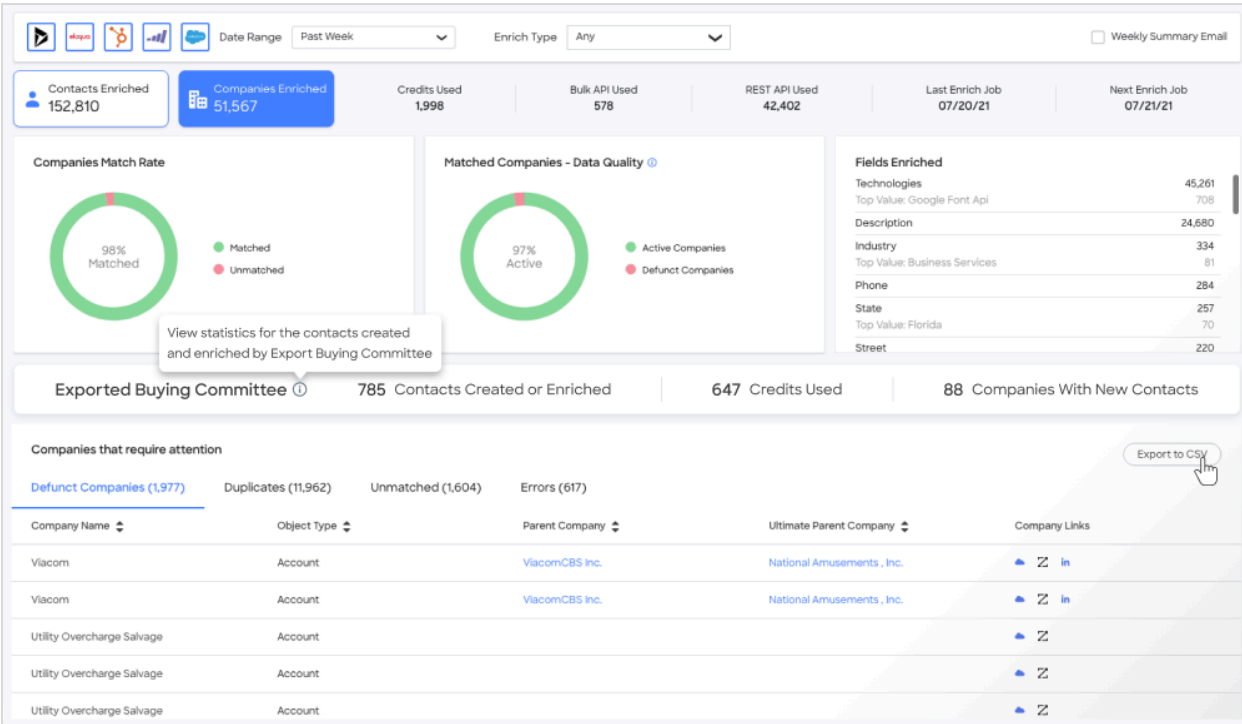
Discrepancies are categorized to help you manually investigate and resolve issues and export lists.

Contact-related Tabs	Company-related Tabs
Person Has Moved	Defunct Companies
Duplicates	Duplicates
Company Match Only	Unmatched
Unmatched	Errors
Errors	

Click **Export to CSV** to export up to 1,000 records for the current tab.

View Exported Buying Committee Statistics

The Enrich Dashboard also tracks the contacts that are created and enriched if you've enabled the Export Buying Committee feature.



The details include:

Contacts Created - Total number of Unique Contacts Created or Enriched as part of the Export Buying Committee feature

Credits Charged - Total number of credits charged by the Export Buying Committee feature

Accounts with New Contacts - Total number of Accounts that have at least 1 new contact created or enriched by the Export Buying Committee feature

API Considerations

After successfully matching to ZoomInfo profiles, records are updated by leveraging the Salesforce Bulk API.

Salesforce provides a limit for the number of API calls which can be used by an organization.

- Check with Salesforce support to confirm how many API calls your organization has access to (daily limits).
- Take into account the other integrations you are using that also use Salesforce's API.
- Note that additional API calls are made during job configuration, such as when loading CRM fields for mapping.

Scheduled Enrich: When a job is initiated in Scheduled Enrich, Salesforce records are queried using the Salesforce Bulk API in batches. By default, records are processed in batches of 10,000.

You can choose to configure a smaller batch size to 1,000, 500, or 200. Note the following considerations:

- A larger batch size results in less calls to the Salesforce Bulk API.
- Reducing the batch size will lead to increased Salesforce API call consumption.

Instant Enrich: With Instant Enrich, ZoomInfo will use two (2) API calls per record enriched.

- The first API call is used to check the field values existing on the record. This check is made to confirm if the field is blank or contains a value (done for the Update Option behavior).
- The second API call is used to update the contact or company record with ZoomInfo data.