

# Enrich for Salesforce Integration Guide

For administrators setting up ZoomInfo Enrich integration with Salesforce

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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

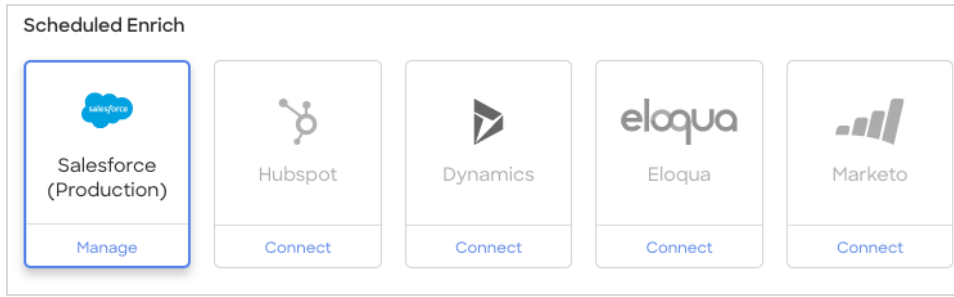
1. Go to **Admin Portal > Integrations > Connect Enrich**.
2. In the **Scheduled Enrich** section, click **Connect** under the Salesforce tile.
3. Select your environment and click **Connect**.

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**.

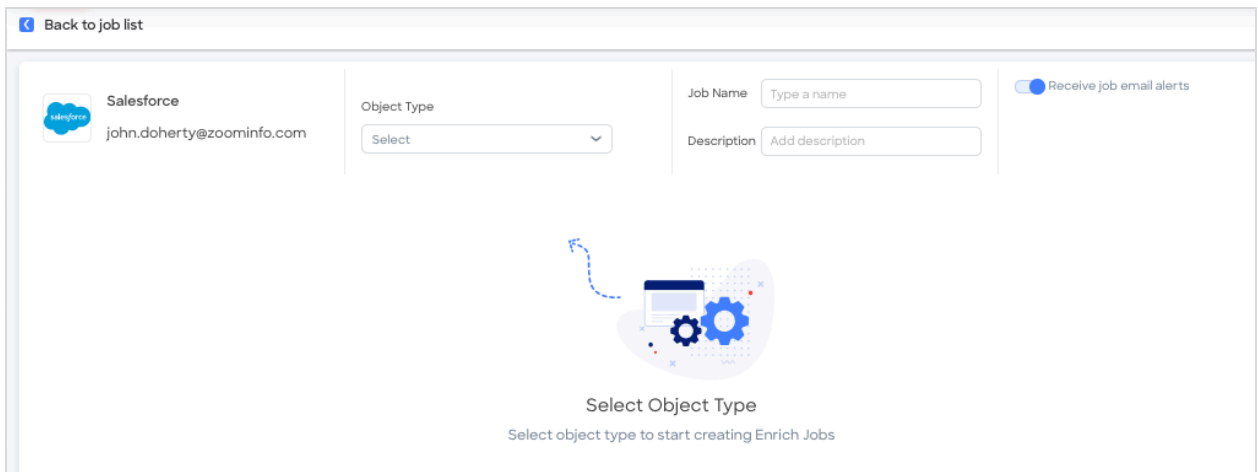


## Add Scheduled Jobs

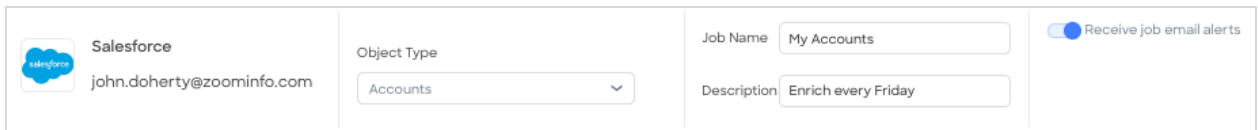
Add recurring scheduled jobs to keep your Salesforce records enriched. Within each job, you'll specify the frequency of enrichment, specify the static list to enrich, and configure the mapping of ZoomInfo data to Salesforce properties.

To add a scheduled job:

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

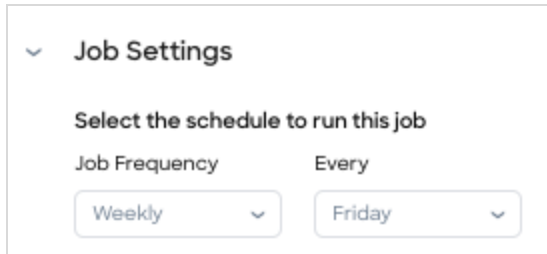


3. For **Object Type**, select either **Accounts**, **Contacts**, or **Leads** in the drop-down.
4. Provide a **Job Name** and **Description** and choose whether you want job email alerts.



## Job Settings

Configure the run frequency for your job.

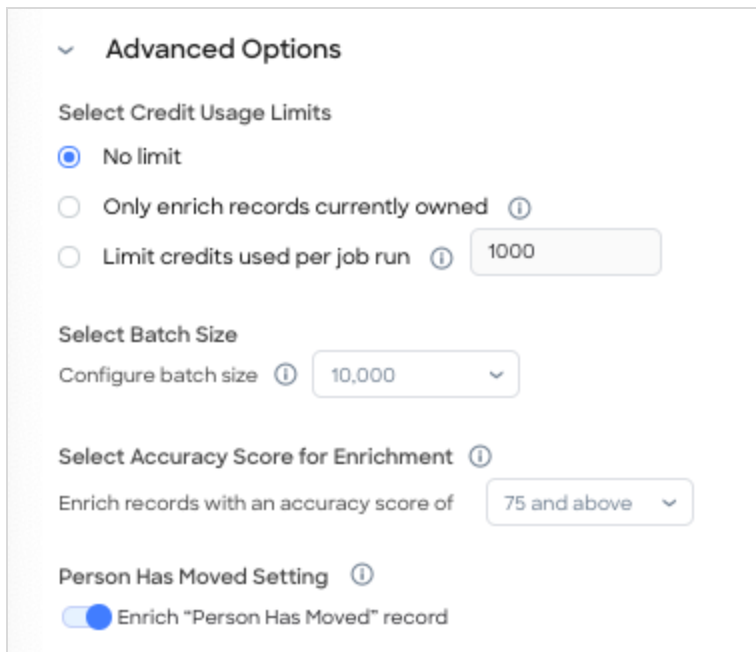


The screenshot shows a configuration panel titled "Job Settings" with a dropdown arrow. Below the title is the instruction "Select the schedule to run this job". Underneath, there are two labels: "Job Frequency" and "Every". Below "Job Frequency" is a dropdown menu with "Weekly" selected. Below "Every" is a dropdown menu with "Friday" selected.

**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.



The screenshot shows a configuration panel titled "Advanced Options" with a dropdown arrow. Below the title is the instruction "Select Credit Usage Limits". There are three radio button options: "No limit" (selected), "Only enrich records currently owned" (with an info icon), and "Limit credits used per job run" (with an info icon and a text input field containing "1000"). Below this is the instruction "Select Batch Size" with a sub-label "Configure batch size" (with an info icon) and a dropdown menu showing "10,000". Next is the instruction "Select Accuracy Score for Enrichment" (with an info icon) and a sub-label "Enrich records with an accuracy score of" followed by a dropdown menu showing "75 and above". At the bottom is the "Person Has Moved Setting" (with an info icon) and a toggle switch labeled "Enrich 'Person Has Moved' record" which is currently turned on.

### 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.

Job Filters

Specify which accounts you would like to enrich

Enrich all accounts

Enrich accounts within a List View

Enrich accounts with specific criteria

All Accounts

View number of records

**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        | Salesforce Field            | Example                             | Update Option               |
|-----------------------|-----------------------------|-------------------------------------|-----------------------------|
| Name                  | Account Name                | e.g. Zoom Information, Inc.         | Complete if mis...          |
| ZoomInfo Company ID   | ZoomInfo Company ID (D..    | e.g. 344589814                      | Overwrite field             |
| Current Date and Time | ZoomInfo First Updated (D.. | e.g. 01/02/2020 12:00:00PM UTC      | Complete if mis...          |
| Current Date and Time | ZoomInfo Last Updated (D..  | e.g. 01/02/2020 12:00:00PM UTC      | Overwrite field             |
| Description           | Account Description         | e.g. ZoomInfo is the most compre... | Complete if mis...          |
| Street                | Billing Street              | e.g. 307 Waverley Oaks Road, Suit.. | Complete if mis...          |
| City                  | Billing City                | e.g. Waltham                        | Complete if mis...          |
| State                 | Billing State/Province      | e.g. Massachusetts                  | Advanced Complete if mis... |
| Zip Code              | Billing Zip/Postal Code     | e.g. 02452                          | Complete if mis...          |
| Country               | Billing Country             | e.g. United States                  | Advanced Complete if mis... |

**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.

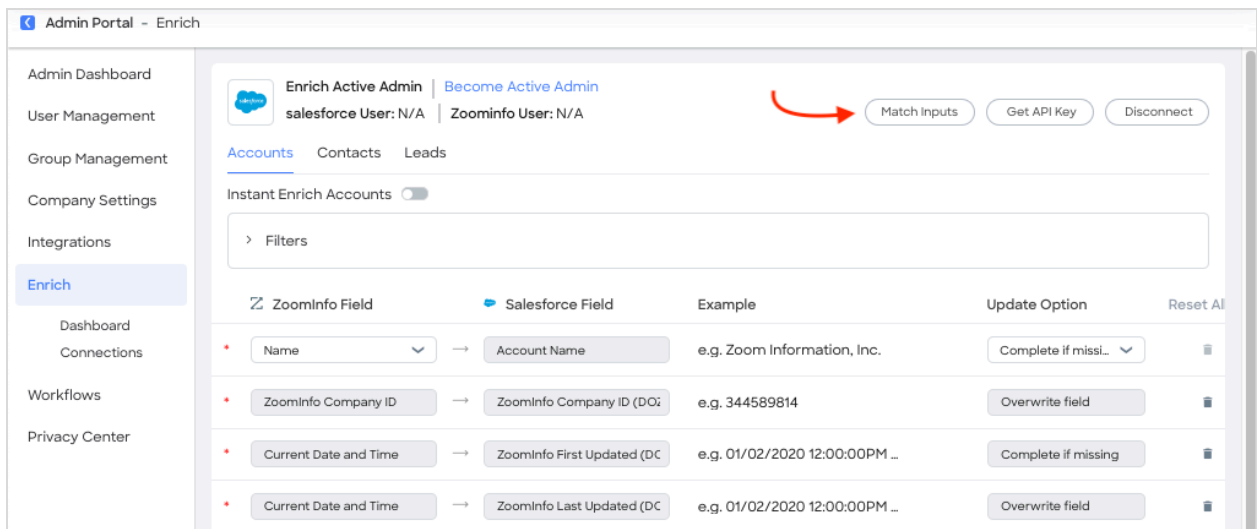
## Customize Match Inputs

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

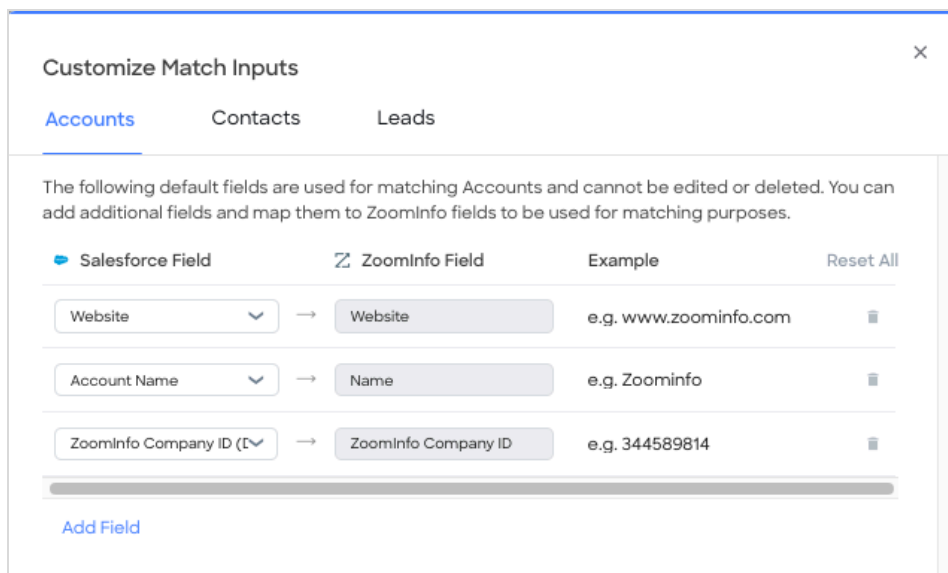
Each object type (e.g., Accounts, Contacts, and Leads) has a set of default fields that ZoomInfo uses to match in Salesforce. Although you cannot change the default ZoomInfo fields, you can include additional ZoomInfo fields on which to match - giving you more data accuracy control when enriching records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

The screenshot shows the Salesforce interface for configuring a job. At the top left, the user is identified as 'Salesforce john.doherty@zoominfo.com'. The 'Object Type' is set to 'Accounts'. The 'Job Name' is 'Accounts Enrich', and the 'Description' is 'Add description'. There are two dates: 'Date Created 03/04/21 09:49:49' and 'Last Updated 03/04/21 09:49:49'. A toggle for 'Receive job email alerts' is turned on. Below these are several expandable sections: 'Job Settings', 'Job Filters', 'Mapping', 'Intent Settings' (with a toggle), 'Scoops Settings' (with a toggle), and 'Export Buying Committee' (with a toggle). The 'Export Buying Committee' section is expanded, showing options to 'Choose the criteria to create new contacts in your CRM' (Job Title, Job Function, Management Level) and 'Update Settings' (Enrich existing contacts, Ignore existing contacts). A field for 'Specify the number of contacts you want to create for each job run' is set to '5', with a note 'This is limited up to 10 contacts'. At the bottom, there is a 'Contact Mapping' section.

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.

The 'Select Job Function' dialog box has a title bar with a close button (X). Below the title, it says 'Select department & job functions for your contacts' with a 'Clear All' link. A search bar contains three selected items: 'IT Operations', 'Technology Operations', and 'Logistics', each with a close button (X). To the right of the search bar is a button labeled 'Add Job Function & Department'. Below the search bar, there is an example text: 'Example: Marketing, Operations, Finance, Engineering & Technical, Information Technology'. At the bottom right, there are two buttons: 'Cancel' and 'Add'.

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

**Update Settings**

Enrich existing contacts

Ignore existing contacts

Specify the number of contacts you want to create for each job run  This is limited up to 10 contacts

- 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.

Export Buying Committee

Choose the criteria to create new contacts in your CRM

Job Title Job Function Management Level

**Update Settings**

Enrich existing contacts

Ignore existing contacts

Specify the number of contacts you want to create for each job run  This is limited up to 10 contacts

**Contact Mapping**

[Back to default preferences](#)

| ZoomInfo Field        | → | Salesforce Field             | Example                        | Update Option                                 |
|-----------------------|---|------------------------------|--------------------------------|---|
| Last Name             | → | Last Name                    | e.g. Nir                       | Complete L. <input type="button" value="⋮"/>  |
| ZoomInfo Contact ID   | → | ZoomInfo Contact ID (D.O...) | e.g. 1645938489                | Overwrite L. <input type="button" value="⋮"/> |
| ZoomInfo Company ID   | → | ZoomInfo Company ID (D...)   | e.g. 344589814                 | Overwrite L. <input type="button" value="⋮"/> |
| Current Date and Time | → | ZoomInfo First Updated (...) | e.g. 01/02/2020 12:00:00PM UTC | Complete L. <input type="button" value="⋮"/>  |
| Current Date and Time | → | ZoomInfo Last Updated (...)  | e.g. 01/02/2020 12:00:00PM UTC | Overwrite L. <input type="button" value="⋮"/> |
| First Name            | → | First Name                   | e.g. Hila                      | Complete L. <input type="button" value="⋮"/>  |

## 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.

| Job Name                        | Object Type | Time Interval | Date Created      | Next Scheduled Run | Status                              | Email Alerts                        | Actions |
|---------------------------------|-------------|---------------|-------------------|--------------------|-------------------------------------|-------------------------------------|---------|
| <a href="#">My Accounts</a>     | Accounts    | Weekly        | 04/21/21 11:08:56 | 04/28/21 00:00:00  | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | ...     |
| <a href="#">Accounts Enrich</a> | Accounts    | Weekly        | 03/04/21 09:49:49 | 04/23/21 00:00:00  | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | ...     |
| <a href="#">Accounts weekly</a> | Accounts    | Weekly        | 06/16/20 15:43:04 |                    | <input type="checkbox"/>            | <input type="checkbox"/>            | ...     |
| <a href="#">Leads</a>           | Contacts    | Weekly        | 06/16/20 15:42:24 | 04/23/21 00:00:00  | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | ...     |

## 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.

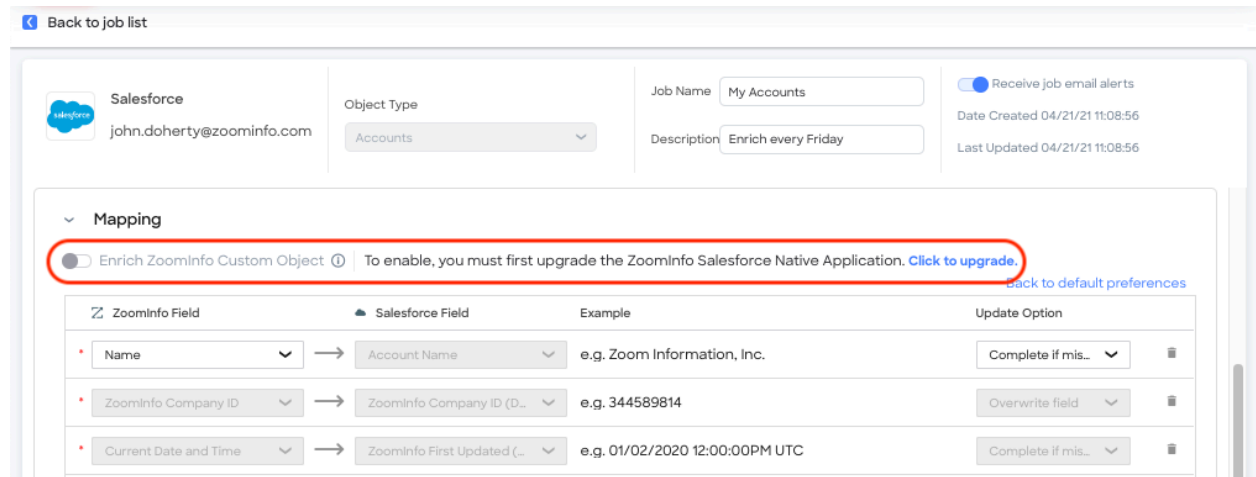
By using the custom object, you'll continue to get the ZoomInfo data you want in your Salesforce records custom mapping settings while also having access to the full data for Contact and Company records you've purchased - without expending any additional credits.

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:

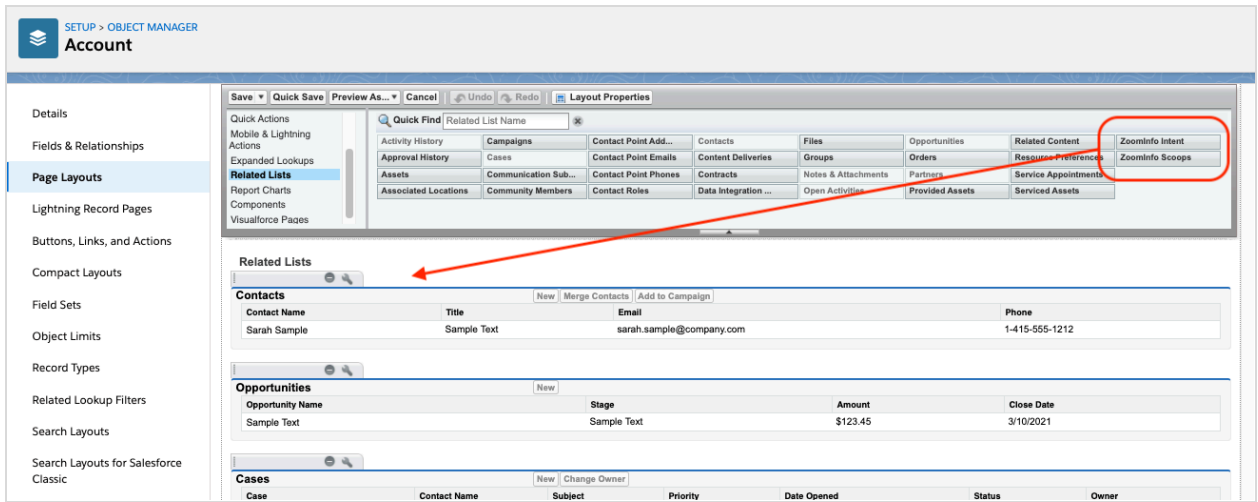
- Intent and Scoops from the past 30 days are enriched in Salesforce.
- For Account Enrich jobs that include Intent and Scoops, the process for enriching the Intent and Scoops data is separate from other Account data processed with the job. There may be a delay between when an Enrich job is completed, 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

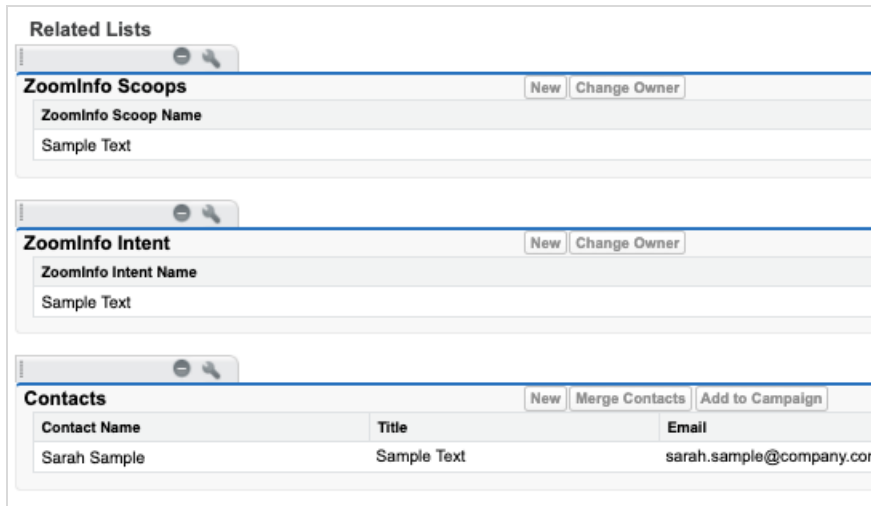
Intent and Scoops are exported to corresponding custom objects included with the ZoomInfo Sales Native Application list package.

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.



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



- 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**.

**Related List Properties - ZoomInfo Scoops** [X]

[Help](#) [?]

**Columns** [−]

Select fields to display on the related list. You can also re-order the selected fields.

| Available Fields       |   | Selected Fields     |  |
|------------------------|---|---------------------|--|
| Contact                | Add<br><input type="button" value="▶"/><br><input type="button" value="◀"/><br>Remove | Topics              | Up<br><input type="button" value="▲"/><br><input type="button" value="▼"/><br>Down |
| Created By             |   | Type                |  |
| Created By Alias       |   | ZoomInfo Scoop Name |  |
| Created Date           |   |                     |  |
| Date Published         |   |                     |  |
| Description            |   |                     |  |
| Last Modified By       |   |                     |  |
| Last Modified By Alias |   |                     |  |
|                        |   |                     |  |
|                        |   |                     |  |

Sort By: --Default-- [v]

Ascending

Descending

**Buttons** [+]

OK Cancel Revert to Defaults

**Related List Properties - ZoomInfo Intent** [X]

[Help](#) [?]

**Columns** [−]

Select fields to display on the related list. You can also re-order the selected fields.

| Available Fields       |   | Selected Fields      |  |
|------------------------|---|----------------------|--|
| Change in Signal Score | Add<br><input type="button" value="▶"/><br><input type="button" value="◀"/><br>Remove | Topic                | Up<br><input type="button" value="▲"/><br><input type="button" value="▼"/><br>Down |
| Created By             |   | Category             |  |
| Created By Alias       |   | ZoomInfo Intent Name |  |
| Created Date           |   |                      |  |
| Intent ID              |   |                      |  |
| Last Modified By       |   |                      |  |
| Last Modified By Alias |   |                      |  |
| Last Modified Date     |   |                      |  |
|                        |   |                      |  |
|                        |   |                      |  |

Sort By: --Default-- [v]

Ascending

Descending

**Buttons** [+]

OK Cancel Revert to Defaults

- 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.

The screenshot shows two sections: 'Intent Settings' and 'Scoops Settings'. Both have a toggle switch turned on. Under 'Intent Settings', there is a text prompt 'Choose the specific Intent criteria you would like to export to Salesforce:' followed by an information icon and a 'Topics' button. Under 'Scoops Settings', there is a similar text prompt followed by an information icon and three buttons: 'Types', 'Departments', and 'Topics'.

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

The 'Select Scoop Topics' dialog box shows a search bar and a list of categories on the left. Three categories are selected: 'Emerging Tech', 'Enterprise Technology', and 'Infrastructure'. The right side of the dialog shows three selected topics: 'Scoop Topic: Emerging Tech', 'Scoop Topic: Enterprise Technology', and 'Scoop Topic: Infrastructure'. There are 'Save' and 'Cancel' buttons at the bottom.

The 'Select Intent Topics' dialog box shows a search bar and a list of categories on the left. Four categories are selected: 'Analytics & Insights', 'Big Data', 'Data Science', and 'Storage'. The right side of the dialog shows four selected topics: 'Intent Topic: Analytics & Insights', 'Intent Topic: Big Data', 'Intent Topic: Data Science', and 'Intent Topic: Storage'. There are 'Save' and 'Cancel' buttons at the bottom.

3. Click **Verify & Save**.

Back to job list

Salesforce  
john.doherty@zoominfo.com

Object Type  
Accounts

Job Name  
Accounts Enrich

Receive job email alerts

Description  
Add description

Job Filters

Specify which accounts you would like to enrich

- Enrich all accounts
- Enrich accounts within a List View
- Enrich accounts with specific criteria

Mapping

Intent Settings

Choose the specific Intent criteria you would like to export to Salesforce: ⓘ

Topics (4)

Scoops Settings

Choose the specific Scoop criteria you would like to export to Salesforce: ⓘ

Types (2) Departments (1) Topics (3)

## Manage Jobs

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

Jobs Runs Uninstall

[New Job](#)

| Job Name                        | Object Type | Time Interval | Date Created      | Next Scheduled Run | Status                              | Email Alerts                        | Actions                            |
|---------------------------------|-------------|---------------|-------------------|--------------------|-------------------------------------|-------------------------------------|------------------------------------|
| <a href="#">Accounts Enrich</a> | Accounts    | Weekly        | 03/04/21 09:49:49 | 04/09/21 00:00:00  | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | ...                                |
| <a href="#">Accounts weekly</a> | Accounts    | Weekly        | 06/16/20 15:43:04 |                    | <input type="checkbox"/>            |                                     | Run Job<br>Delete Job<br>Clone Job |
| <a href="#">Leads</a>           | Contacts    | Weekly        | 06/16/20 15:42:24 | 04/09/21 00:00:00  | <input checked="" type="checkbox"/> |                                     |                                    |

## 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

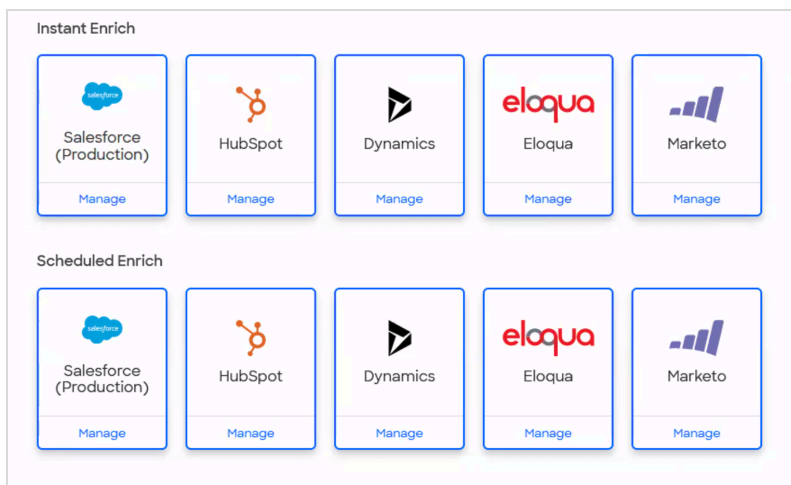
This section describes how you can manage the connection over time, including changing the Enrich Active Admin (for example, due to a departure or re-org), or disconnecting the Enrich integration.

### Change Enrich Active Admin

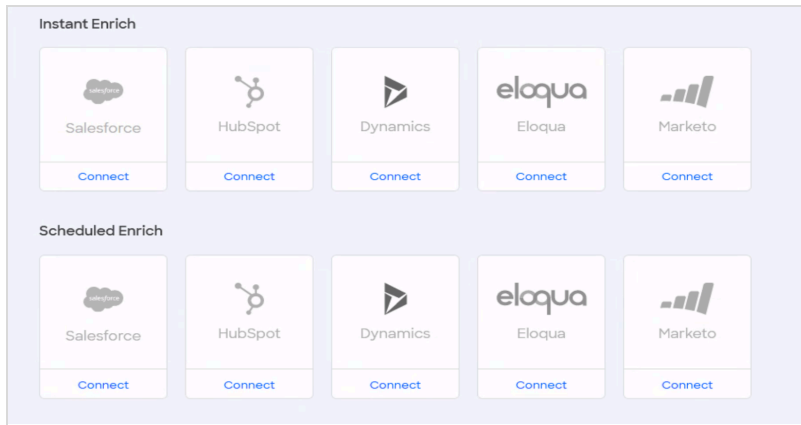
Enrich administrators must have full administrative privileges in Salesforce. The Enrich administrator must also have an Admin Portal seat on the ZoomInfo platform.

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**.

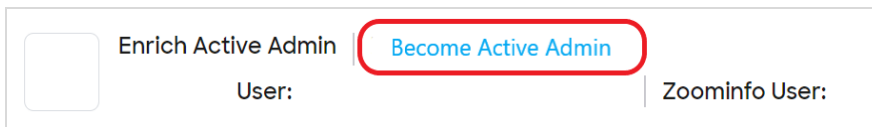


**Note:** If the tile is not in color and says **Connect** you will need to follow the prompts for connecting your ZoomInfo Admin seat to your Salesforce instance.

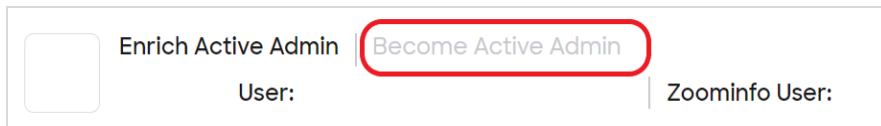


For additional information on how to connect Enrich for Salesforce see the [ZoomInfo Integrations Resource Matrix](#).

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)

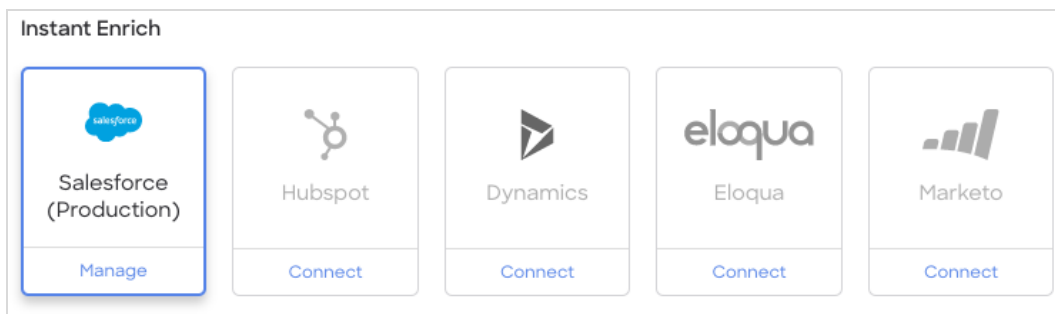
### Configure ZoomInfo Authentication Credentials

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+)

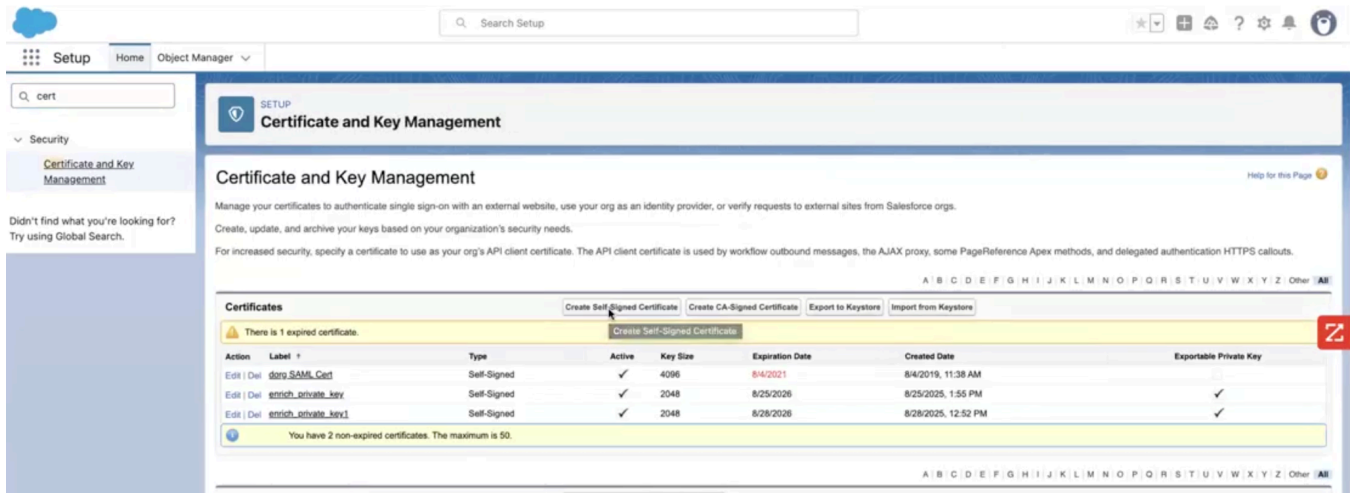
### Configure Certificate-Based Authentication

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.

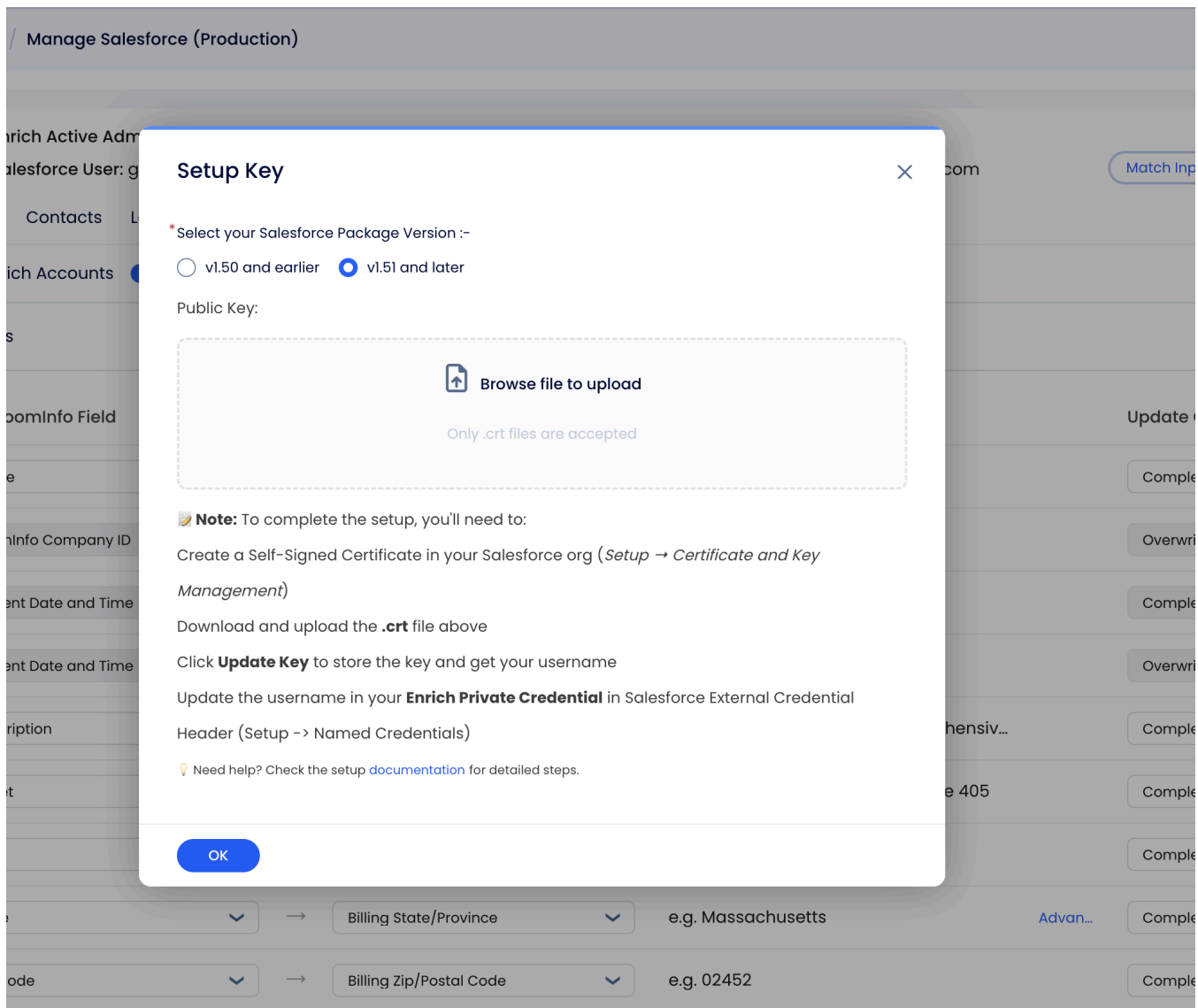
### Step 1: Create Self-Signed Certificate in Salesforce

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
  - o 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
  - o 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**

**Edit Enrich Private Credential**

\* Label: Enrich Private Credential

\* Name: Enrich\_Private\_Credential

\* Authentication Protocol: JWT

**Common Claims**

Issuer (iss): https://www.zoominfo.com

Subject (sub): enrich@zoominfo.com

Audience (aud): enrich@zoominfo.com

JWT Expiration (Seconds): 3,600

**JWT Signing**

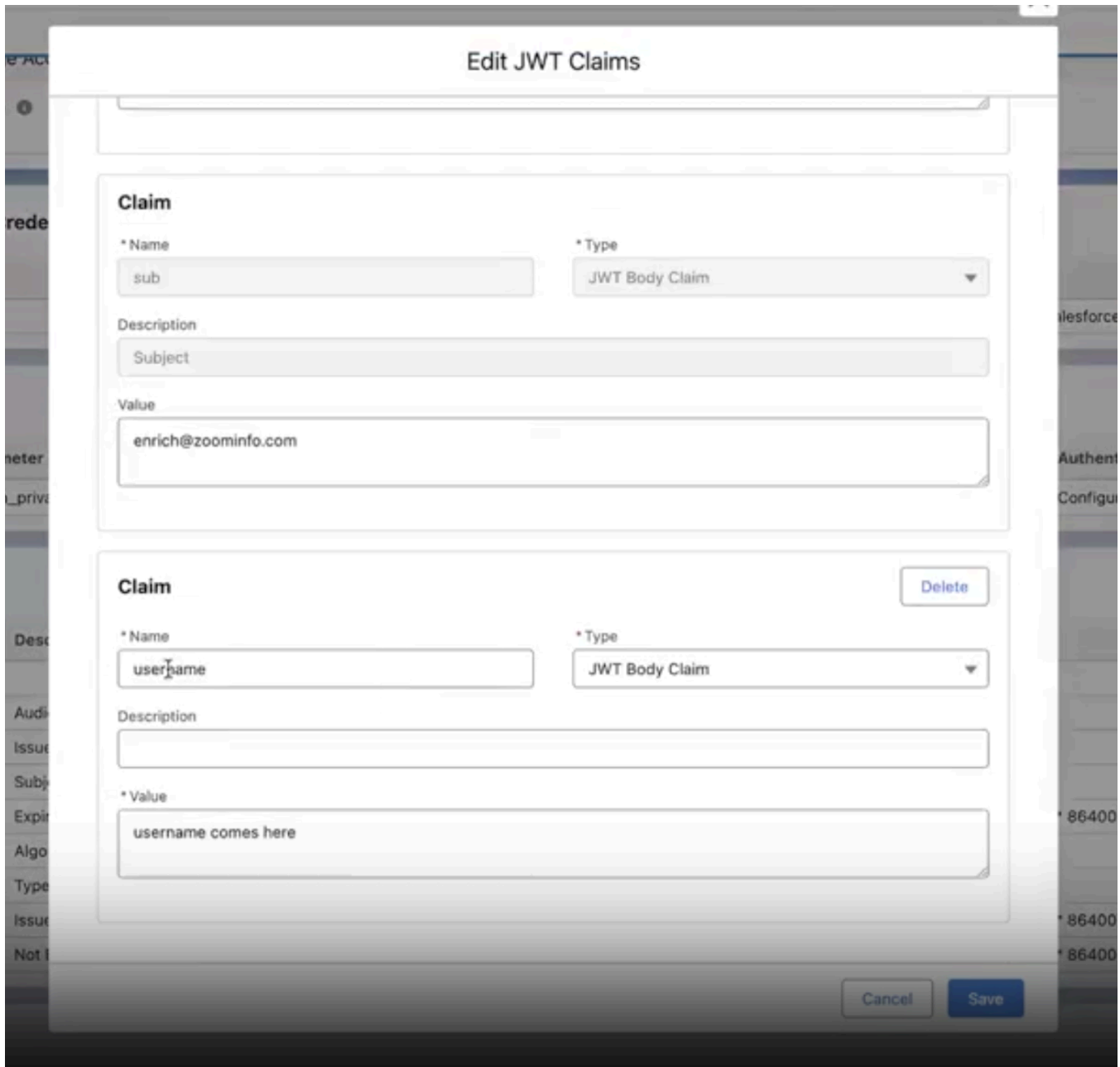
\* Signing Certificate: Search Certificates...  
enrich\_related\_certs  
enrich\_private\_key1  
enrich\_private\_key

\* Signing Algorithm: RS256

Cancel 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.

Accounts | **Contacts** | Leads Get API Key | Disconnect

Instant Enrich Contacts

Filter by SOQL

Select Accuracy Score for Enrichment ⓘ  
 Enrich records with an accuracy score of 75 and above

[Back to default preferences](#)

| ZoomInfo Field        | Salesforce Field             | Example                              | Update Option                        |
|-----------------------|------------------------------|--------------------------------------|--------------------------------------|
| Last Name             | Last Name                    | e.g. Nir                             | Comple... <input type="checkbox"/>   |
| ZoomInfo Contact ID   | ZoomInfo Contact ID (DOZ)    | e.g. 1645938489                      | Overwrit... <input type="checkbox"/> |
| ZoomInfo Company ID   | ZoomInfo Company ID (DOZ)    | e.g. 344589814                       | Overwrit... <input type="checkbox"/> |
| Current Date and Time | ZoomInfo First Updated (DOZ) | e.g. 01/02/2020 12:00:00PM UTC       | Comple... <input type="checkbox"/>   |
| Current Date and Time | ZoomInfo Last Updated (DOZ)  | e.g. 01/02/2020 12:00:00PM UTC       | Overwrit... <input type="checkbox"/> |
| First Name            | First Name                   | e.g. Hilla                           | Comple... <input type="checkbox"/>   |
| Job Title             | Title                        | e.g. Vice President of Marketing ... | Comple... <input type="checkbox"/>   |
| Contact Street        | Mailing Street               | e.g. 307 Waverley Oaks Road, Sui...  | Comple... <input type="checkbox"/>   |

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.

Z Accounts | Contacts | Leads Z

Instant Enrich Accounts

Filter by SOQL  
 Enrich accounts Where

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.

[Back to default preferences](#)

| ZoomInfo Field     | Salesforce Field     | Example   | Update Option     |
|--------------------|----------------------|---|-------------------|
| Name               | Account Name         | e.g. Zoom Information,...                                     | Complete if mi... |
| ZoomInfo Comp...   | ZoomInfo Com...      | e.g. 344589814  | Overwrite field   |
| Current Date an... | ZoomInfo First ...   | e.g. 01/02/2020 12:00:0...                                    | Complete if mi... |
| Current Date an... | ZoomInfo Last ...    | e.g. 01/02/2020 12:00:0...                                    | Overwrite field   |
| Description        | Account Descri...    | e.g. ZoomInfo is the m...                                     | Complete if mi... |
| Street             | Billing Street       | e.g. 307 Waverley Oaks...                                     | Complete if mi... |
| City               | Billing City         | e.g. Waltham  | Complete if mi... |
| State              | Billing State/Pro... | e.g. Massachusetts <span style="color: blue;">Advanced</span> | Complete if mi... |
| Zip Code           | Billing Zip/Posta... | e.g. 02452  | Complete if mi... |
| Country            | Billing Country      | e.g. United States <span style="color: blue;">Advanced</span> | Complete if mi... |
| Ticker             | Ticker Symbol        | e.g. NASDAQ: INTC   | Complete if mi... |

**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**.

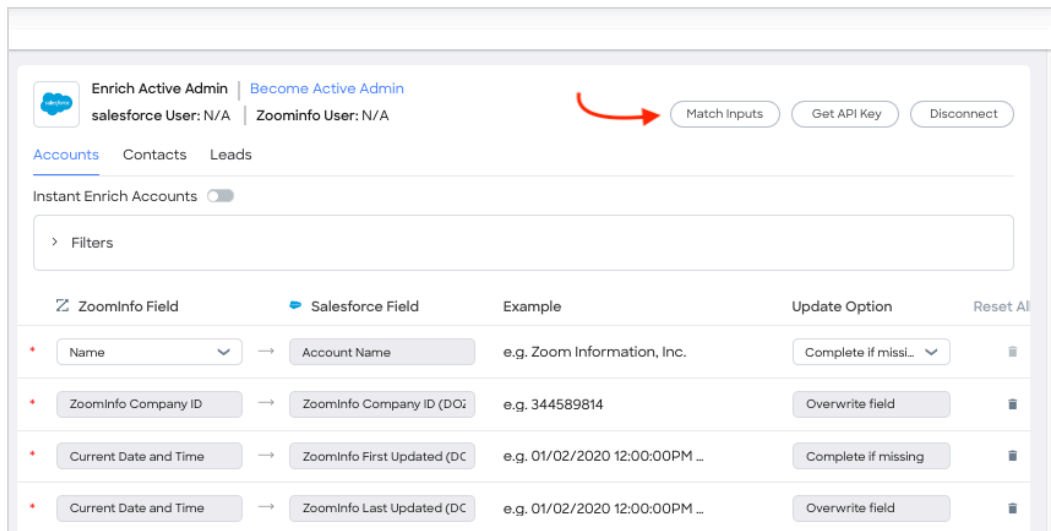
## Customize Match Inputs

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

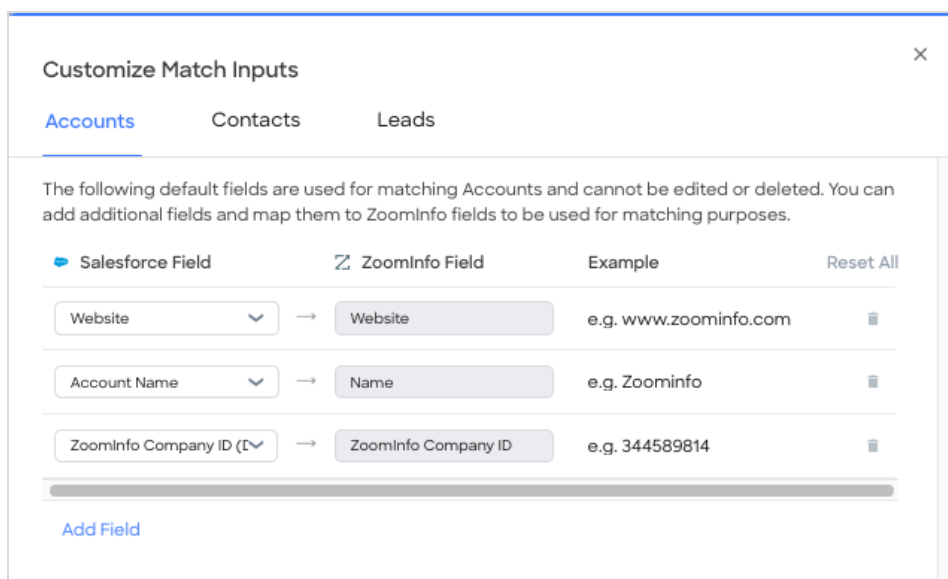
Each object type (e.g., **Accounts**, **Contacts**, and **Leads**) has a set of default fields that ZoomInfo uses to match in Salesforce. Although you cannot change the default ZoomInfo fields, you can include additional ZoomInfo fields on which to match - giving you more data accuracy control when enriching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

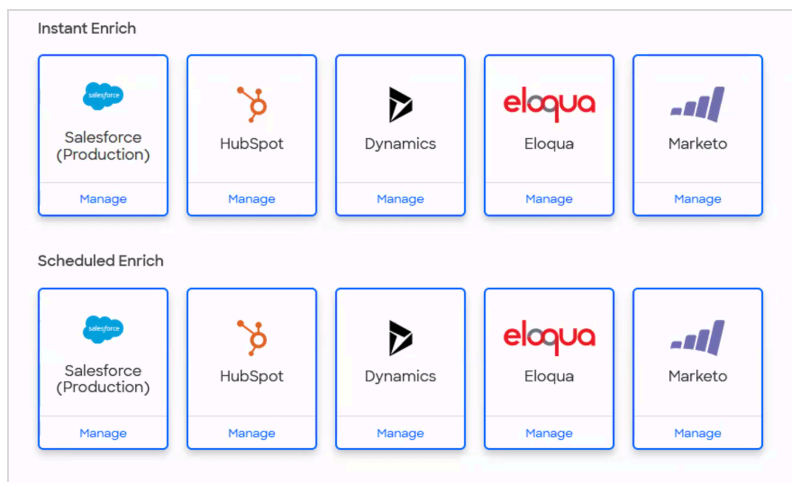
This section describes how you can manage the connection over time, including changing the Enrich Active Admin (for example, due to a departure or re-org), or disconnecting the Enrich integration.

### Change Enrich Active Admin

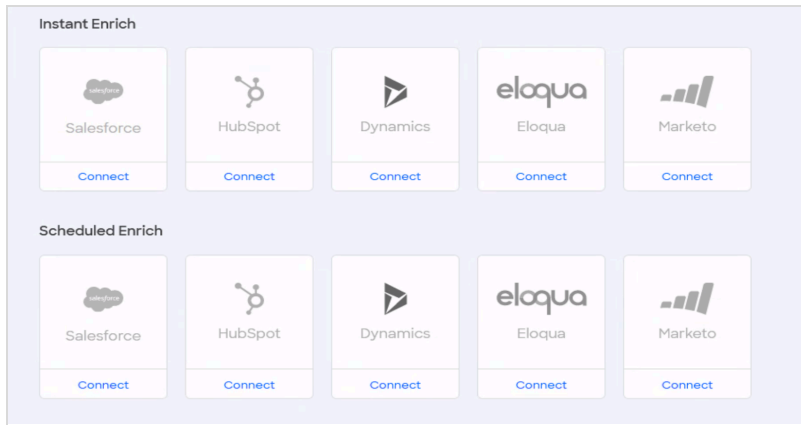
Enrich administrators must have full administrative privileges in Salesforce. The Enrich administrator must also have an Admin Portal seat on the ZoomInfo platform.

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**.

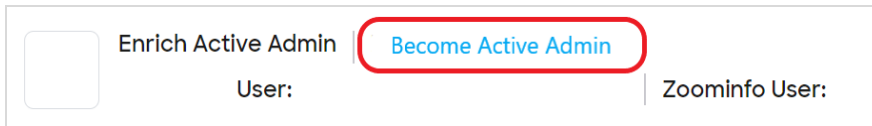


**Note:** If the tile is not in color and says **Connect** you will need to follow the prompts for connecting your ZoomInfo Admin seat to your Salesforce instance.

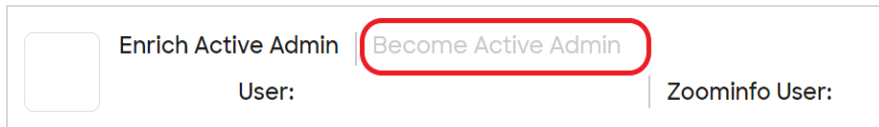


For additional information on how to connect Enrich for Salesforce see the [ZoomInfo Integrations Resource Matrix](#).

- 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.



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

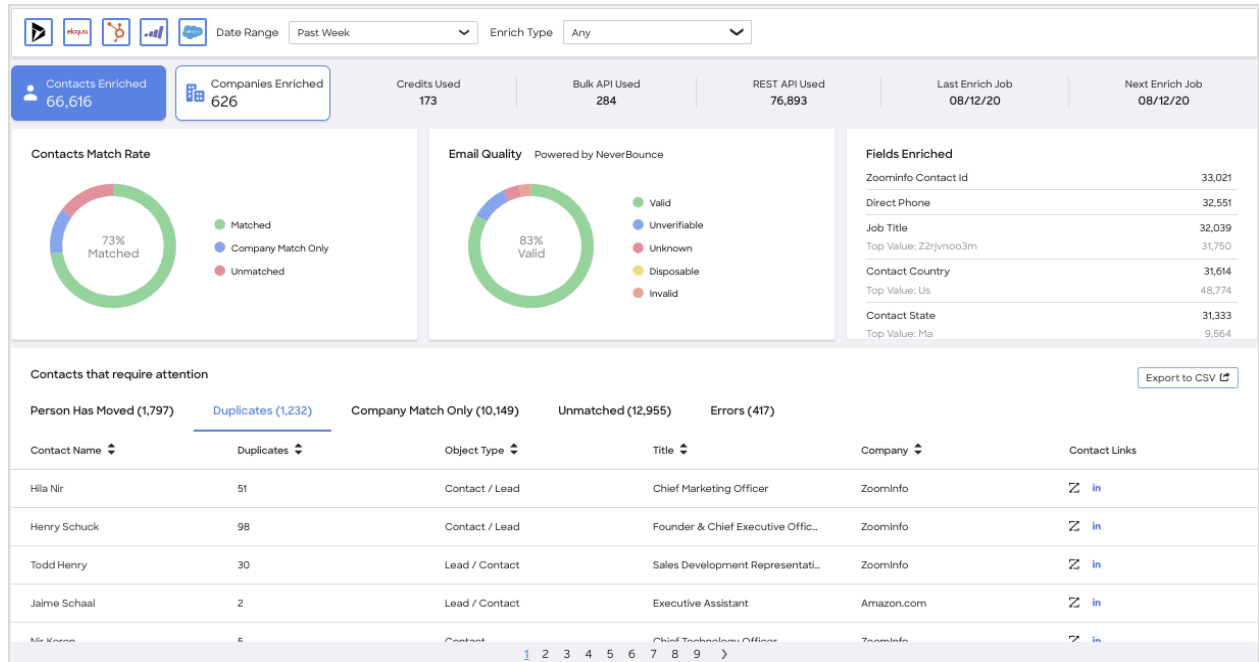
As a ZoomInfo admin, the Enrich dashboard gives you a detailed graphical view of how Scheduled Enrich has impacted the quality and depth of data for your connected CRM and marketing automation integrations.

## 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.

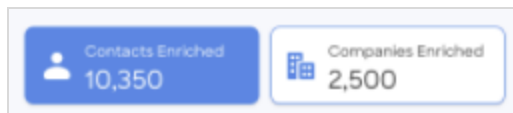


## Using the Dashboard

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

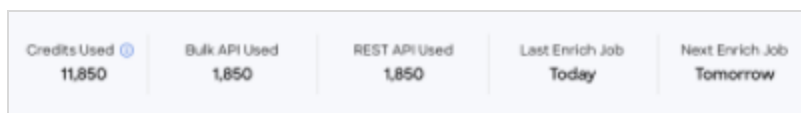
### View Contact and Company Enrich Statistics

**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.

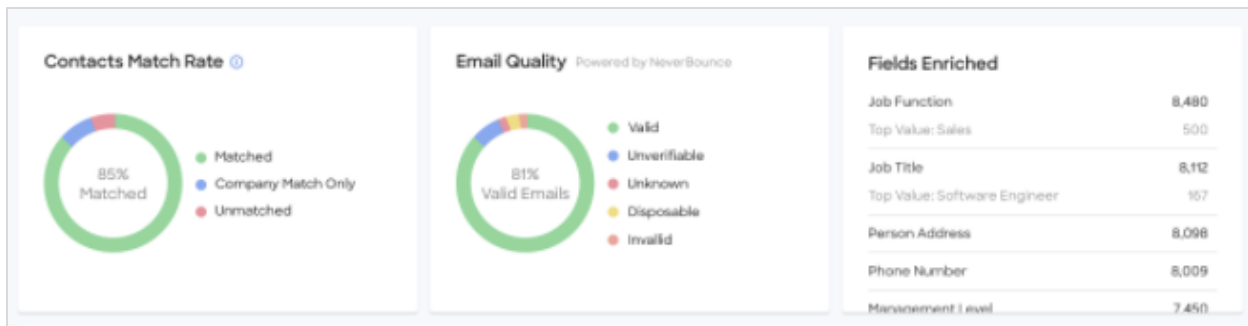


## View Match Rate, Email Quality and Fields Enriched

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

| Contacts that require attention |                    |                             |                                    |              |                                      | Export to CSV |
|---------------------------------|--------------------|-----------------------------|------------------------------------|--------------|--------------------------------------|---------------|
| Person Has Moved (1,797)        | Duplicates (1,232) | Company Match Only (10,149) | Unmatched (12,955)                 | Errors (417) |                                      |               |
| Contact Name                    | Duplicates         | Object Type                 | Title                              | Company      | Contact Links                        |               |
| Hila Nir                        | 51                 | Contact / Lead              | Chief Marketing Officer            | Zoominfo     | <a href="#">Z</a> <a href="#">in</a> |               |
| Henry Schuck                    | 98                 | Contact / Lead              | Founder & Chief Executive Offic... | Zoominfo     | <a href="#">Z</a> <a href="#">in</a> |               |
| Todd Henry                      | 30                 | Lead / Contact              | Sales Development RepresentatiL    | Zoominfo     | <a href="#">Z</a> <a href="#">in</a> |               |
| Jaime Schaal                    | 2                  | Lead / Contact              | Executive Assistant                | Amazon.com   | <a href="#">Z</a> <a href="#">in</a> |               |
| Mr. K...                        | 5                  | Contact                     | Chief Technology Officer           | Zoominfo     | <a href="#">Z</a> <a href="#">in</a> |               |

## Companies that Require Attention

| Companies that require attention |                |                 |                         |                                      |  | Export to CSV |
|----------------------------------|----------------|-----------------|-------------------------|--------------------------------------|--|---------------|
| Defunct Companies (22)           | Duplicates (4) | Unmatched (5)   | Errors (1,160)          |                                      |  |               |
| Company Name                     | Object Type    | Parent Company  | Ultimate Parent Company | Company Links                        |  |               |
| RainKing Software                | Account        | DiscoverOrg LLC | Zoom Information, Inc.  | <a href="#">Z</a> <a href="#">in</a> |  |               |
| RainKing Software                | Account        | DiscoverOrg LLC | Zoom Information, Inc.  | <a href="#">Z</a> <a href="#">in</a> |  |               |
| RainKing Software                | Account        | DiscoverOrg LLC | Zoom Information, Inc.  | <a href="#">Z</a> <a href="#">in</a> |  |               |
| RainKing Software                | Account        | DiscoverOrg LLC | Zoom Information, Inc.  | <a href="#">Z</a> <a href="#">in</a> |  |               |
| RainKing Software                | Account        | DiscoverOrg LLC | Zoom Information, Inc.  | <a href="#">Z</a> <a href="#">in</a> |  |               |

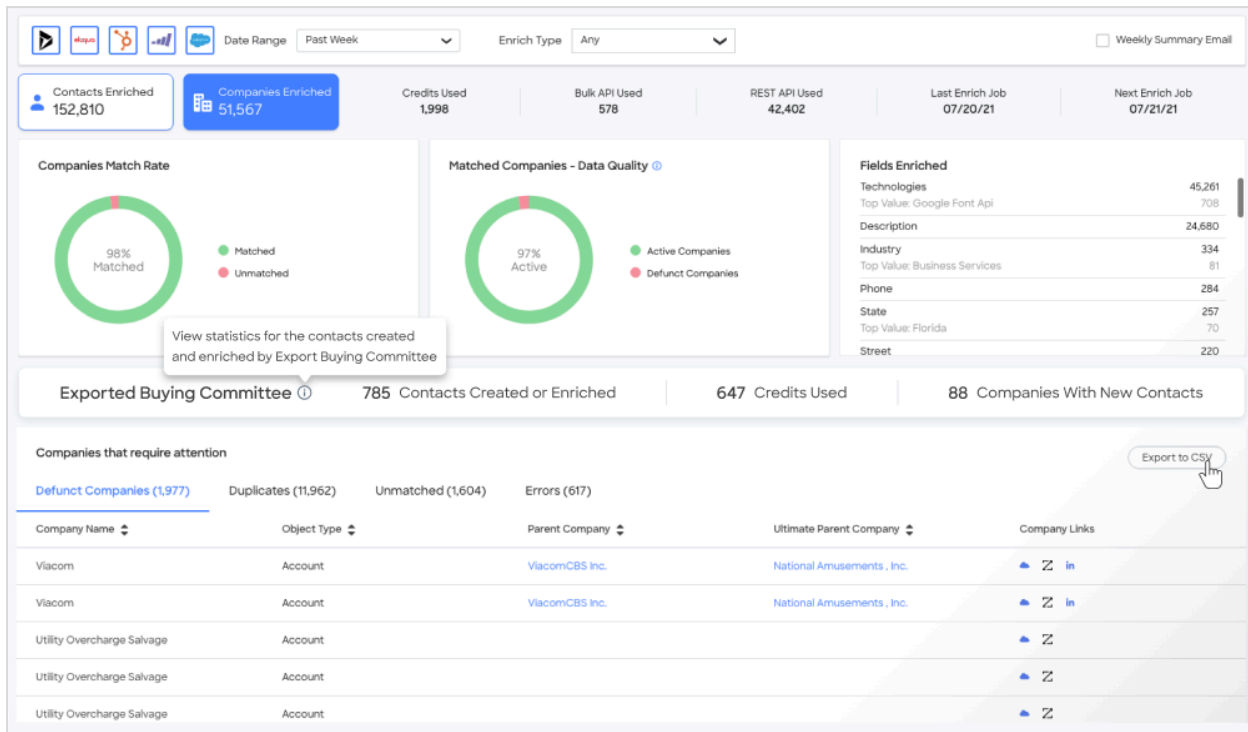
Discrepancies are categorized to help you manually investigate and resolve issues and export lists.

| 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.