HubSpot Integration Guide

For administrators setting up the ZoomInfo integration with HubSpot

Prerequisites and Considerations

Review the following prerequisites and considerations before you connect and configure the integration.

HubSpot Permissions

Ensure your org's users have the following permissions in HubSpot.

See the [HubSpot user permissions guide](#) for how to set user permissions. We'll tell you what permissions to set!

---

1. Log into HubSpot as an admin and go to the settings page.

2. Click **Users & Teams**.

3. Hover over a user and click **Edit permissions**.

4. Click **CRM > CRM objects** and set permissions for the user

   For **Contacts**, set the minimum (or recommended) permission requirements:

Permission	Minimum	Recommended
View	Contacts they own	All contacts
Edit	Contacts they own	All contacts
Delete	Contacts they own	All contacts

   For **Companies**, set the minimum (or recommended) permission requirements:

Permission	Minimum	Recommended
View	Companies they own	All companies
Edit	Companies they own	All companies
Delete	Companies they own	All companies

For any custom objects, set the minimum permission requirements:

Permission	Minimum
View	All [object]
Edit	All [object]
Delete	All [object]

5. On the **Marketing** tab, ensure the **Marketing Access** toggle is set to **ON**.

6. On the **Account > Settings Access** tab, ensure the **App Marketplace access** toggle is set to **ON**.

7. Click **Save**.

Admin permissions

The HubSpot user account used to establish the HubSpot connection in ZoomInfo must be one of the following:

- A HubSpot Super Admin

- An HubSpot Admin user with the same permissions described [earlier in this section](#).

> ▷ **Video**: [HubSpot Super Admin Credentials](#) (ZoomInfo login required)

Supported HubSpot Plans

The following HubSpot plans are supported:

- Free

- Basic

- Professional

- Enterprise

Implementation Overview

Here's the flow for initial implementation:

1. Choose your export preference connection option.

2. Make the initial admin connection.

3. Configure your export settings (supported objects, limits and other settings)

4. Configure mapping between ZoomInfo data fields and HubSpot fields and behavior for each field when exporting.

5. If you have ZoomInfo Copilot, Advanced Sync is enabled by default to allow ZoomInfo to import and analyze information about your team and prospects/customers from HubSpot.

6. Configure HubSpot Filtering which enables your organization's users to view and filter records found in HubSpot right within ZoomInfo Advanced Search.

7. Turn on the integration for your users and enable them to begin exporting.

8. Understand how duplicate checking logic and data sharing with ZoomInfo works.

Export Preference Connection Options

As the admin setting up the initial integration with HubSpot, you must configure how you connect to HubSpot to support exports from ZoomInfo. This section describes your connection options and other considerations.

You have two options:

- Service Account Connection (Default)

- Individual User Account Connections

Service Account Connection (Default)

The default (and preferred) option is to use a service account to connect your organization's users.

A service account simplifies the onboarding process as your organization evolves and changes, and eliminates the need for your Support team to troubleshoot individual HubSpot connection issues for your users.

The Basics

- The service account is simply a single account through which the integration is connected for your organization's users. This account can be a dedicated HubSpot Super Admin or have the permissions described in HubSpot Permissions.

- All exports and HubSpot Filtering jobs will be run using this account.

- Other ZoomInfo admins and users will not need to connect to HubSpot using their own credentials.

- Assuming your org's ZoomInfo user accounts match to HubSpot user accounts, exports will be associated with the user that made the export.

Primary Connected Admin and Secondary Admins

Primary Connected Admin

- The ZoomInfo admin that makes the initial connection to HubSpot is considered the primary connected admin.

- Only the primary connected admin can disconnect the connection to HubSpot.

- Any other ZoomInfo admins defined in your organization can manage the configuration settings such as adjusting mapping, export settings, and filtering. However, these admins cannot directly disconnect the connection to HubSpot.

Secondary Admins

Any other ZoomInfo admins defined in your organization are considered a secondary admin. These admins:

- Can view the existing HubSpot integration configured for the org without connecting their own HubSpot account to Zoominfo.

- Can manage the configuration settings such as adjusting mapping, export settings, and filtering.

- Can disable all exports for users by toggling off the connections.

- Can switch the service account user by using the **Change User** option on the **General Settings** page for the integration (Service Account option only). Ensure the new service account user has the same set of HubSpot permissions as the previous user.

- Cannot directly disconnect the connection to HubSpot. However, a secondary admin can become the primary admin by using the **Change User** option on the **General Settings** page for the integration.

ZoomInfo and HubSpot User Account Mapping

It's important that your ZoomInfo users map to HubSpot users to ensure proper record ownership assignment when using the Service Account connection option. This preserves ownership in HubSpot for net-new records exported from Zoominfo. We provide a simple UI for an admin to review this mapping on the integration settings page.

Reset Mapping

Some orgs utilize a sandbox instance and a production instance of their CRM for internal testing and may switch their connected instance in ZoomInfo from one instance to the other. Check your user mapping to ensure it reflects users in your production instance. Click the **Reset Mapping** reset the mapping to reflect the users found in the currently-connected instance. The **User Mapping** table will be reset based on the connected org instance and will populate with the users from that instance.

Record Ownership When Exporting Using a Service Account Connection

Here's how record ownership logic is applied when exporting using the Service Account connection option.

If the exporting user's email address in ZoomInfo is the same as their HubSpot user email address:

- ZoomInfo will automatically associate exports of net new records with the user that performed the export.

- The record owner for net new records exported will be set to the user account that performed the export.

If the exporting user's email address in ZoomInfo does not match their HubSpot user email address:

- The record **Owner** fields will reflect the primary connected admin.

- If this logic presents an issue for your organization, you can choose the Individual User Account Connections option instead. This will require your organization's users to individually connect to HubSpot.

Individual User Account Connections

Select the **User Account** option and require each of your organization's users to connect to HubSpot to be able to export.

- Ensure that your org's users have the [required permissions in HubSpot](#).

- You'll still need to make the initial admin connection for the integration using the required [HubSpot credentials](#).

Primary Connected Admin vs. Secondary Admins

The same functionality described in the [Primary Admin and Secondary Admins](#) apply to the User Account option with the exceptions noted.

Required User Connections

To be able to export from ZoomInfo to HubSpot, each user must connect to HubSpot using their own credentials.

- Once you have enabled the integration for all users by clicking the toggle to the left of the integration in the Admin Portal, individual ZoomInfo users can connect to HubSpot.

- Admins should share the following link with users for instructions on [how to connect to HubSpot](#).

Get Connected

1. Go to **Admin Portal > Integrations > Connections**.
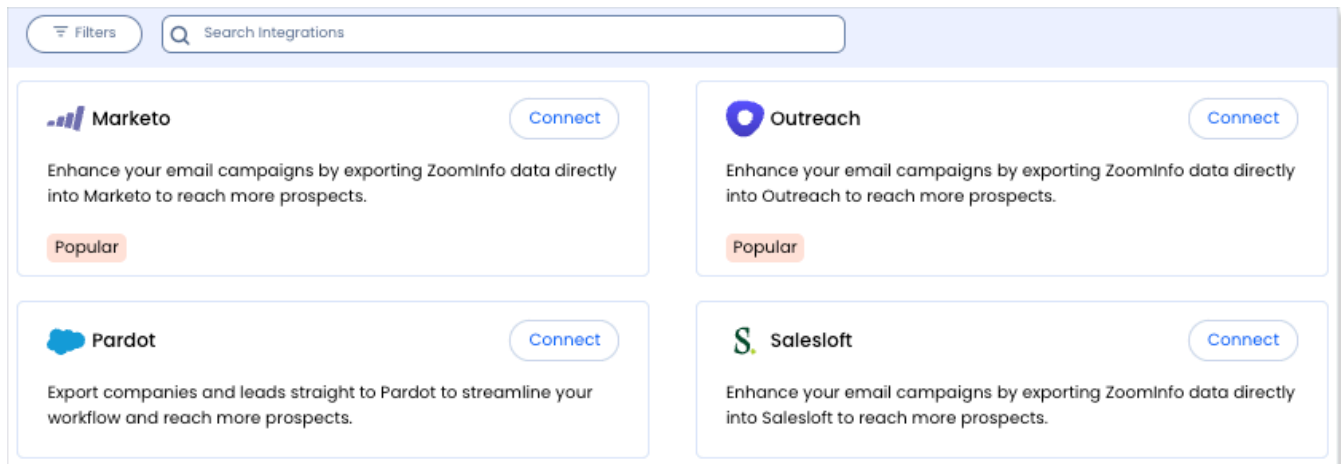
2. Use the **Filters**, or **Search integrations** options to find your integration.

3. On the tile for your integration, click **Connect**.

4. Log in with your credentials. This account must be a Super Admin in HubSpot.

- As described in [Service Account Connection](#), the **Service Account** is the default preference. Therefore, when you make this connection, the HubSpot credentials you provide here will be set as your **Service Account**.

- As the admin setting up the initial connection, your ZoomInfo account will be listed as the **ZoomInfo Admin** (and considered the [primary connected admin](#)).

- You can choose to change the default preference of **Service Account** to **User Account** after making the initial connection. This will require all of you users to individually connect to HubSpot to use the integration.

5. In the popup, click the radio button next to the HubSpot account you want to connect then click **Choose Account**.

6. A success message displays. Click **Edit Settings** on the success message to be directed to the **General Settings** page for the HubSpot integration.

7. Note that your ZoomInfo account is listed as the **ZoomInfo Admin** and the **Service Account User** is the account with which you connected the integration.

Configure Integration Settings

Once your integration is connected, you can configure the settings, including export preferences, mapping, and filtering:

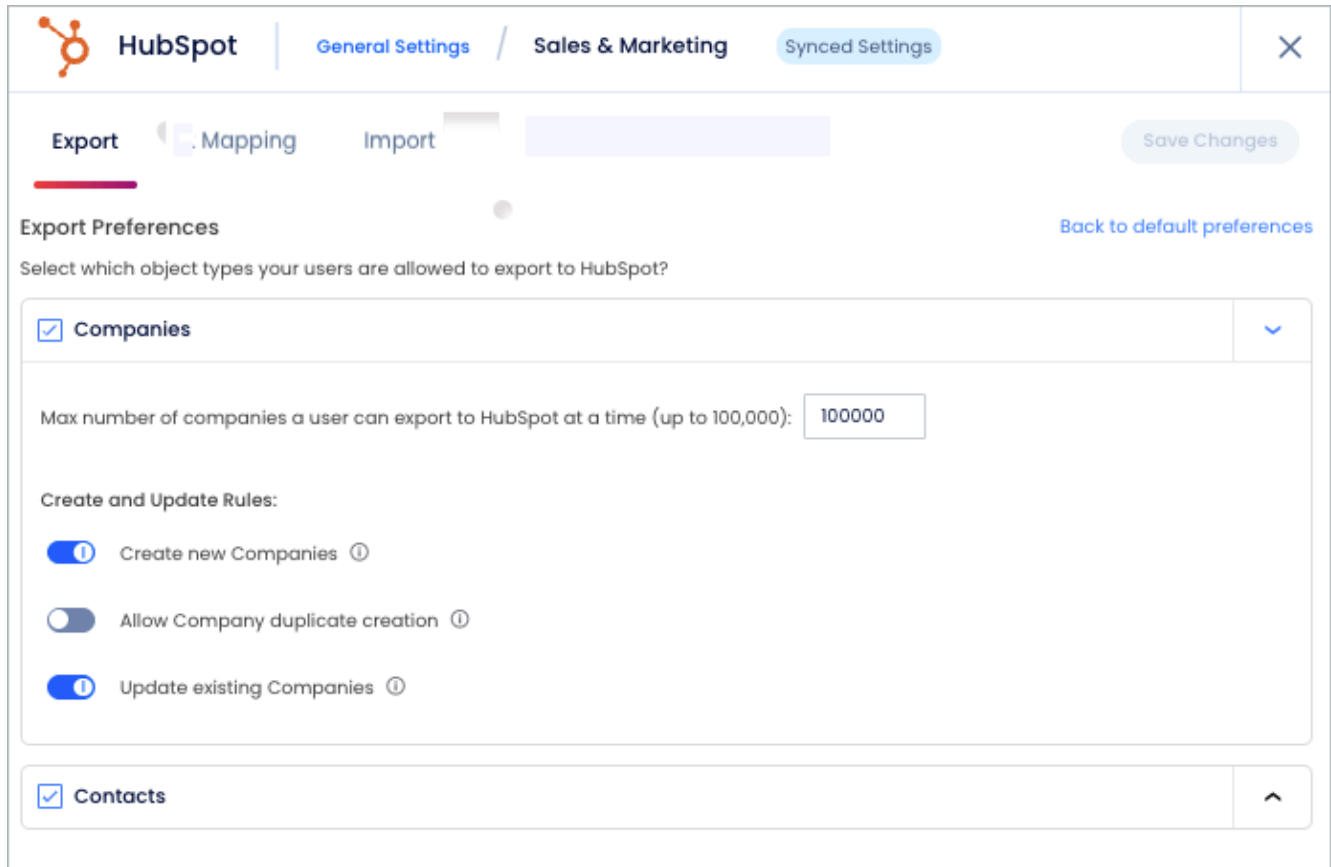To access the **Settings** page for your integration:

- Click **Edit Settings** from the connection success message.

- If you've already closed the connection success message, navigate to the **Connected** tab and click **... > Settings** in the **Action** column.

From this page, click **Edit settings** to begin configuring your integration.

Export Preferences

ZoomInfo admins can configure export preferences and limit the objects that can be exported.

1. Click the **Export** tab.

2. Select each object type you want your users to be able to export to HubSpot.

> **Note**: You can adjust the max number of records a user can export for each object type.

3. Click **Save Changes** to apply the changes for all users in your organization's ZoomInfo instance.

 Video: Relating Contacts to Companies in HubSpot (ZoomInfo login required)

Associating contacts and companies in your HubSpot: ZoomInfo does not natively associate contacts with contacts in your HubSpot. When exported from ZoomInfo, contacts are considered independent records in HubSpot. If you want to automate associating contacts to companies in HubSpot, you'll need to enable that capability in HubSpot. See the HubSpot knowledge base article, Automatically create and associate companies with contacts for details.

Custom Mapping

Click the **Mapping** tab.

On the **Mapping** tab, use the **Companies** and **Contacts** tabs to review the default mappings for each object type and make any mapping changes.

Field	Description
ZoomInfo Field	Available ZoomInfo fields. Required fields are marked with an asterisk (*).
HubSpot Field	Available HubSpot fields. These fields are retrieved directly from your HubSpot instance.
Update Options	Select an option: ● **Complete if missing** (default) - Only complete with ZoomInfo data if none exists in HubSpot. ● **Overwrite field** - Overwrite existing data in HubSpot with ZoomInfo data.

If you are mapping to a dropdown or radio selection property in HubSpot, make sure the mapped values match valid Internal Values for that property. Note that values are case sensitive. For more information see this HubSpot article.

Add or Remove Fields

Add fields by clicking **Add Field** at the bottom of the field list.

- Standard fields are automatically displayed.

- Each field that you add must be mapped to a corresponding field in your integration.

- Custom fields must be created in your integration before they can be mapped.

- Click the 🗑 trash icon to remove any fields that you do not want to map.

Set a Hierarchy for ZoomInfo Data Within a Single HubSpot Field

In some cases, you may want multiple ZoomInfo fields to be stacked hierarchically within a single HubSpot field.

For example, you may want to import both the ZoomInfo Direct Phone and Company Phone fields into the HubSpot Business Phone field.

1. Map **Direct Phone** to **Business Phone**.

2. Map **Company Phone** to **Business Phone**.

The first occurrence of the **Business Phone** field is denoted with number 1, and the second with number 2.

Field hierarchy allows for both first and second choice values for selected HubSpot properties. For exported records where more than one data point is available from ZoomInfo (such as phone numbers) you can prioritize the data by preference within your mapping.

▷ **Video**: [Picklist Mapping to Internal Values](#) (ZoomInfo login required)

Test and Save

Before saving your mapping changes, click **Test Mapping** to export and delete a test record using your current settings.

- If the test record cannot be created, this is typically due to an error in the mapping settings. For example, mappings cannot be saved with a blank field.
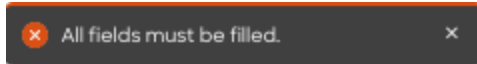
  Adjust the settings and click **Test Mapping** again.

- If the test is successful, a notification displays.
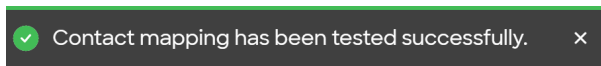
After performing a successful test mapping, click **Save Changes**.

- If the mappings are not set correctly, an error notification displays indicating the adjustments needed. Remove any unfilled rows and click **Save Changes** again.

- If mappings are correctly configured, a success notification displays.

Map ZoomInfo Intent Data to Custom Fields

You can set up custom fields in HubSpot and map ZoomInfo Intent data points to write data to these fields when a company is exported.

There are five ZoomInfo Intent data points:

- Intent Signal Score

- Intent Audience Strength

- Intent Signal Location

- Intent ID

- Intent Issue Date
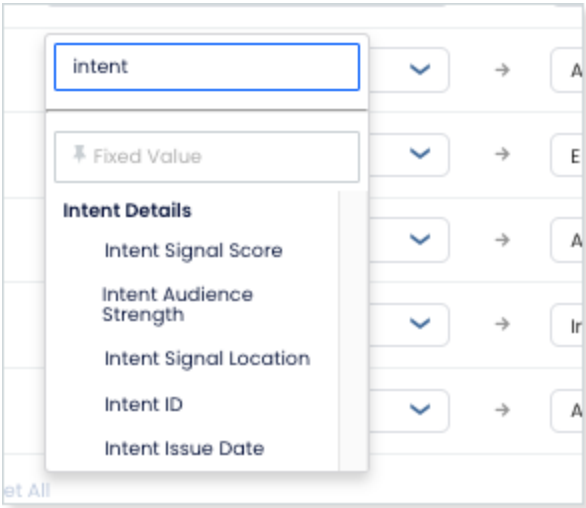
To map all of the possible Intent data points to custom fields, you'll need to create 5 custom fields *per Intent topic*, as the custom field in HubSpot is dedicated to capturing Intent data for each specific topic. For example, if your organization has subscribed to 6 Intent topics, and you want to capture all 5 ZoomInfo Intent data points for each topic, you'll need a total of 30 custom fields.

View and Manage Connected Integrations

Once you've connected one or more integrations, you can view and manage them on the **Connected** tab of the **Admin Portal > Integrations > Connections** page.
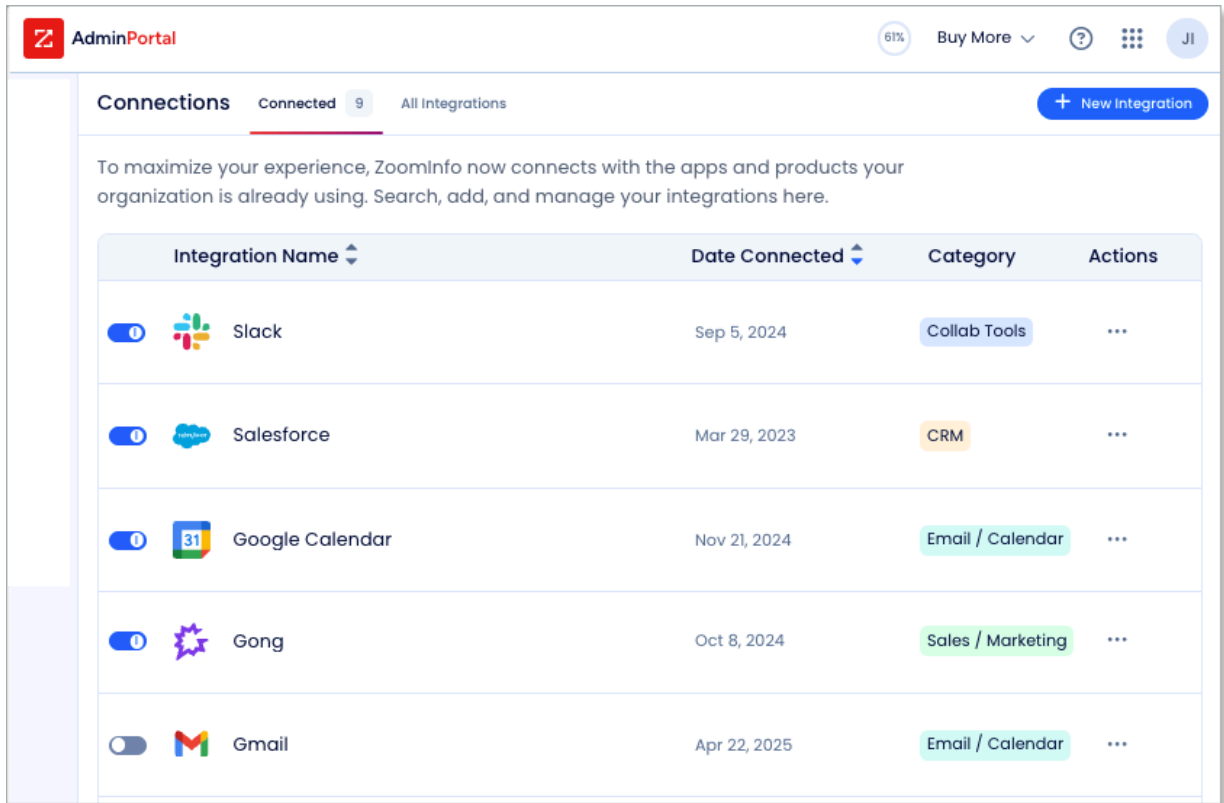
On this page, you can:

1. Use the toggle to turn an integration on or off for users in your organization. Toggling an integration to off does not affect the mapping and export settings you've configured.

2. Update the settings for an integration by clicking the integration name, or by clicking **… > Settings** in the **Action** column.

3. Delete a connected integration (including any mapping and export settings you've configured) by clicking **… > Delete** in the **Action** column.

Duplicate Checking

When a user exports records from ZoomInfo to HubSpot, duplicate checking logic is applied to avoid creating duplicate records within HubSpot.

Admin Control of Duplication Settings

A ZoomInfo admin can control the user's available options for handling duplicates by configuring the default duplication settings for the integration in the Admin Portal. When a duplicate is encountered during export, users can choose the default behavior set by the admin or select other available options.

User Options During Export

During an export, duplicates are flagged and presented to the user. Depending on available options set by an admin, the user can choose to update an existing record, create a duplicate record, or not export the record.

Duplicate Logic

ZoomInfo checks for specific criteria, in a specific order, to determine if existing data in HubSpot matches data being exported.

For companies: When exporting companies to HubSpot, ZoomInfo will check for duplicate HubSpot companies based on the company domain.

For people: People in ZoomInfo are designated as contacts, and can be exported as HubSpot contacts.

When exporting contacts to HubSpot, ZoomInfo will check for duplicate HubSpot contacts using criteria applied in the following order:

1. Email Address

2. First Name + Last Name + Exact Company Name

HubSpot Advanced Sync (ZoomInfo Copilot)

ZoomInfo Copilot utilizes your HubSpot object data and third-party signals to provide timely insights for your go-to-market team. If you are connecting the HubSpot integration with ZoomInfo Copilot, the **Import** tab includes **Advanced Sync**, which is enabled by default.

Advanced Sync allows ZoomInfo to import and analyze information about your team and prospects/customers from HubSpot. This sync is required to deliver auto-configurations of ZoomInfo settings and tailored recommendations to enhance your team's productivity.
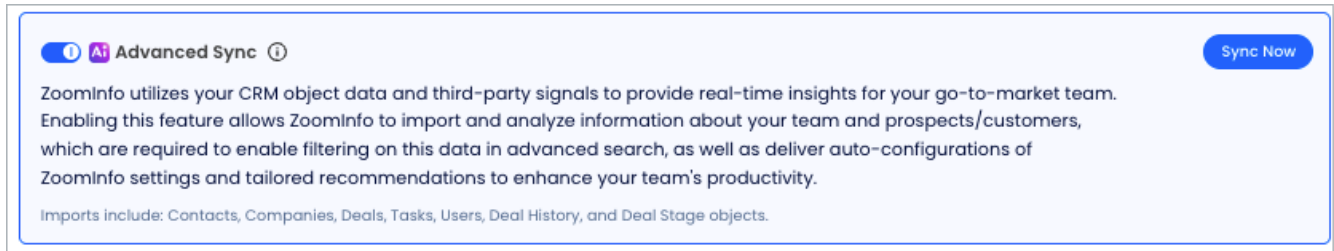
For the optimum ZoomInfo Copilot user experience, it's crucial that Copilot has read access to all fields for the specified objects.

User Experience

Here are some of the user experience enhancements delivered when Advanced Sync is enabled for your HubSpot integration with Copilot:

- **Comprehensive Data Integration**: Copilot aggregates extensive HubSpot data, which is crucial for generating detailed insights and highly targeted recommendations.

- **Efficiency and Productivity**: Automation of data collection and analysis reduces manual data handling, allowing sales teams to focus on engaging with clients and closing deals.

- **Predictive and Generative AI**: Copilot utilizes advanced AI algorithms to predict future buying behaviors and generate actionable engagement strategies. This includes AI-driven suggestions on whom to contact, optimal contact times, and personalized messaging recommendations, all based on HubSpot data.

- **Enhanced Personalization**: Copilot can tailor interactions more precisely to each prospect's context and needs, enhancing personalization and relevancy at scale.

- **Target Account Activation**: Target accounts are automatically activated, enabling a more efficient sales process.

- **Dynamic Company Lists**: Users gain a new 'My Target Accounts' company list, dynamically populated with accounts assigned to them in HubSpot, facilitating a user-friendly experience for building advanced searches.

- **Signal Routing**: When a funding signal from ZoomInfo intersects with your org's HubSpot data, Copilot can route this signal precisely to customers whose solutions align with the growth objectives of these freshly funded companies.

Advanced Sync Object Access

Advanced Sync imports records according to the permissions granted to the connected service account user. To manage the data available in ZoomInfo, you can modify the user's access settings within HubSpot. ZoomInfo will import only the records and fields that the authorized user can access, ensuring that your data remains secure and compliant with your organization's governance policies.

For the optimal experience, Advanced Sync should have read access to the following HubSpot objects.

● Company	● Deal Stage
● Contact	● Task
● Deal	● User
● Deal History	

For each HubSpot object, ZoomInfo will import all fields within that object to which the connected user has access. This data is stored in our secure database. ZoomInfo stores both matched and non-matched data from these HubSpot objects and fields.

- **Matched data**: Records that already exist in your HubSpot.

- **Non-matched data**: This data is used to create rich signals, ensuring that we can present the full picture to your users instead of relying only on a subset that consists of matched-only data.

Impact on Existing HubSpot Filtering Configuration

If you've previously set up [HubSpot Filtering](), the feature's functionality will be uninterrupted. We'll continue to let your users filter in Advanced Search based on the HubSpot Filtering settings.

When Advanced Sync is enabled, the sync already includes all fields within these objects. Our aim is to steer you toward the "optimal setting," guaranteeing the utilization of all fields for each object, instead of confining them to particular lists. Because of this, we've disabled ability to edit the settings within each object. The exception is if you have previously configured lists for the contact object, you can continue to edit lists for filtering purposes only. Advanced Sync will continue to import *all* records/fields on the contact object.

HubSpot Filtering (ZoomInfo Sales and Marketing)

Organizations with Advanced and Elite packages can use HubSpot filtering to configure the filtering of Company, Contact, and Deal objects from HubSpot to ZoomInfo, enabling their ZoomInfo users to see HubSpot ownership data on contact and company profiles within ZoomInfo. ZoomInfo users can utilize this information to refine their ZoomInfo searches to find new prospects faster.

User Experience

Before configuring HubSpot filtering, it's important to understand the capabilities you are enabling for your organization's users.

Once you configure and run HubSpot filtering, ZoomInfo users can use the HubSpot filters in Advanced Search to search for Company and Contact records using the following criteria:

- **Company records**: Include or exclude based on Company ownership or Company type. You can also filter companies based on Deals data in HubSpot.

- **Contact records**: Include or exclude based on Contact ownership with an option to exclude Contacts who have opted out of email.

With the filtered HubSpot data, users can:

- Include all owners to see all of the records matched from HubSpot, or exclude all records matched from HubSpot.

- Select up to 10 owners for each object type when filtering.

- Create saved search alerts based on HubSpot ownership, helping users maintain a narrow focus on prospecting efforts.

- See indicators that a record exists in HubSpot in search results.

- See additional indicators on ZoomInfo contact and company profile pages, including owner information and filter date. Clicking on the owner name will redirect to the existing HubSpot record in a new tab.

Key Considerations

Choose which objects to filter

As an admin setting up HubSpot filtering, you can choose to configure filtering of Company, Contact, and Deal objects.

Disabling filtering for an object

If you subsequently disable filtering for an object, previously-filtered records are not deleted - disabling simply stops future filtering.

Clearing filtered records

If you want to remove records that are already filtered, you have the option to clear them so they no longer appear in searches and remove HubSpot indicators. Clearing filtered records only removes the ownership information in ZoomInfo - your HubSpot records are not impacted.

Record persistence

HubSpot filtering will only persist for the records ZoomInfo is able to match.

Duplicate records

If there are multiple records for the same account, ZoomInfo will only match to one record. For example, your HubSpot instance may include multiple or duplicate companies across different locations. In this case, these records would be matched to a single ZoomInfo profile.

HubSpot records

Only records that meet specified criteria at the time of filtering are filtered. Records that no longer meet the criteria are removed on subsequent filtering runs.

Scheduled runs

Scheduled filtering runs are performed on "off hours", specifically from 8PM to 6AM EST.

Permissions

HubSpot filtering uses the permissions described in [Set User Permissions in HubSpot](#).

Configure HubSpot Filtering Preferences

1. Go to **Admin Portal > Platform Settings > General Settings**.

2. Enable the **Show HubSpot settings, filters, and indications** toggle for HubSpot.
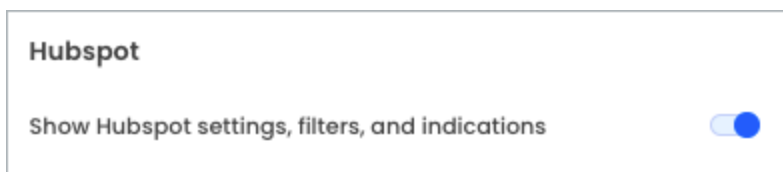
3. Go to **Admin Portal > Integrations > Connections**.

4. On the **Connected** tab, click HubSpot and select **Edit Settings**.

5. Click the **Import** tab.

6. Click the toggle to enable filtering for an object type (e.g., Company).

Schedule Filtering

Use the **Match Frequency** dropdown to schedule filtering for all configured object types.

If you choose **Weekly**, a full sync will occur once per week, beginning on the day you set it up, and recurring each week on that same day.

You can perform a full sync at any time by choosing the **Run Now** option on the **Mapping** tab for an object.

Include Deals

You can choose to **Include Deals** created in the past 6 months, 1 year, or 2 years.

Enable or Disable Filtering

Enable or disable filtering for an object type at any time using the toggle.

Clear Matched Records

You can delete existing records that were previously filtered and matched to ZoomInfo. For example, click **Clear All Matched Contacts**.

Important: This action has no impact on records in your HubSpot instance - it removes records that were matched to ZoomInfo so that they will no longer appear in search results.

Managing and Monitoring Filtering

At any time, you can return to the **Import** tab to view details about your runs, adjust settings, and enable or disable filtering. You can also manually initiate an off-schedule filtering run by clicking **Run Now**. Run statistics are provided for each object. Roll over the info icons to view the definition of each statistic.

 Video: Troubleshooting HubSpot Filtering (ZoomInfo login required)

Configure CRM Writeback (ZoomInfo Copilot)

CRM writeback is a feature for ZoomInfo Copilot organizations that:

- Allows engagement activities such as emails, calls, and meetings conducted through Copilot to be automatically logged to your connected HubSpot system.

- Lets admins choose to log activities as tasks or events, enabling better activity tracking and linking engagement directly to HubSpot records.

Once your integration is set up and enabled, you can enable CRM writeback by following the instructions provided in How to Set Up CRM Writeback.

Enable the Integration for Your Organization

Once you've connected and configured the integration, you can enable it for your users using the toggle.
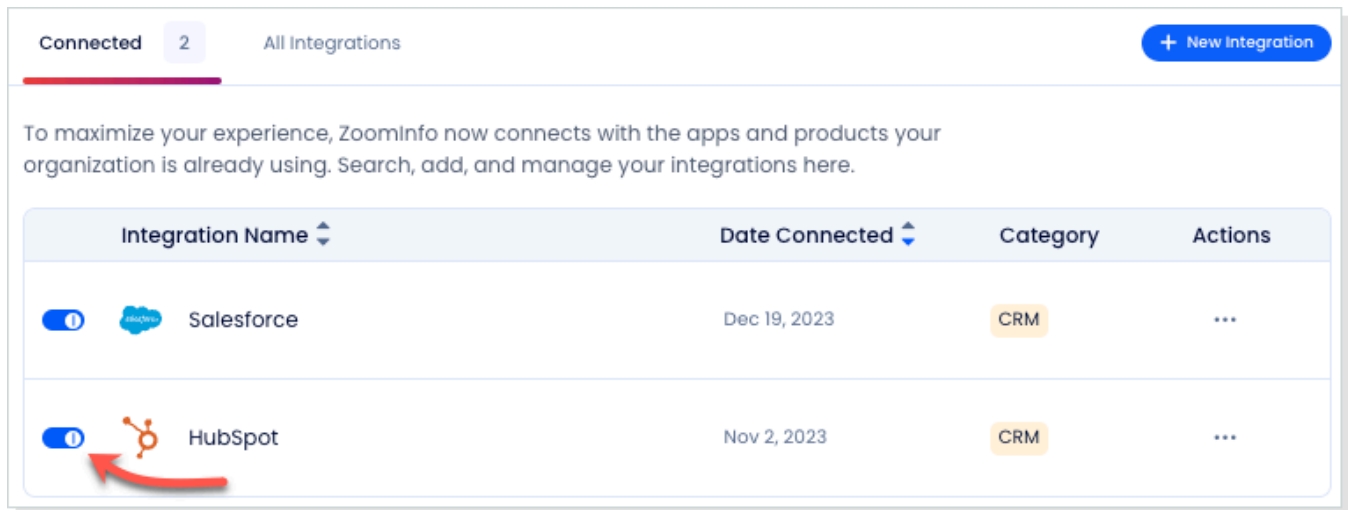
- If you chose to use the default Service Account export preference, turning on the toggle enables the ability to export for all users in your organization.

- If you chose to use the User Account export preference:

  - Individual ZoomInfo users must connect to HubSpot with their own credentials to be able to export.

  - Admins should share the following link with users for instructions on how to connect to HubSpot.

Managing the Integration

Over time, you may need to make changes to your integration configuration - for example, if the primary connected admin leaves the company and you need to swap in a new admin.

Changing the Primary Admin (Service Account Configuration)

If a secondary admin wants to remove the existing primary connected admin and make themselves the new primary connected admin:

1. Go to the **General Settings** page for the integration.

2. Ensure that the new admin has the same [HubSpot permissions](#) as the outgoing admin.

3. Click **Change User**. If the secondary admin is:

   - Already logged in to HubSpot in another browser or tab, the account is simply switched.

   - Not logged in to HubSpot, they'll need to authenticate using their credentials.

In this scenario, the Service Account user is also switched to the secondary admin's account.

Changing the Primary Admin (User Account Configuration)

Changing the primary connected admin in this scenario only applies if your organization is using HubSpot Filtering. If a secondary admin wants to remove the existing primary connected admin and make themselves the new primary connected admin:

1. Go to the **General Settings** page for the integration.

2. Ensure that the new admin has the same [HubSpot permissions](#) as the outgoing admin.

3. Click **Change User**.

Note: If HubSpot Filtering jobs are not configured, the secondary admin will not see the Change User option.

4. If the secondary admin is:

   - Already logged in to HubSpot in another browser or tab, the account is simply switched.

   - Not logged in to HubSpot, they'll need to authenticate using their credentials.

Switching from User Account Option to Service Account Option

If you're currently using the User Account option (or the previous experience that only supported individual user account connections) you can easily switch to the Service Account option:

1. Go to **Admin Portal > Integrations > Connections**.

2. On the **Connected** tab, temporarily turn off the integration for your organization using the toggle.

3. Go to the **General Settings** page for the integration.

4. In the **Export Preference** section, select the **Service Account** option.

5. Click **Save Changes**.

   **Note**: Saving the changes will enable the **Edit User Mapping** link.

6. Verify the user mapping configuration to ensure your org's users are mapped to HubSpot users by clicking **Edit User Mapping**.
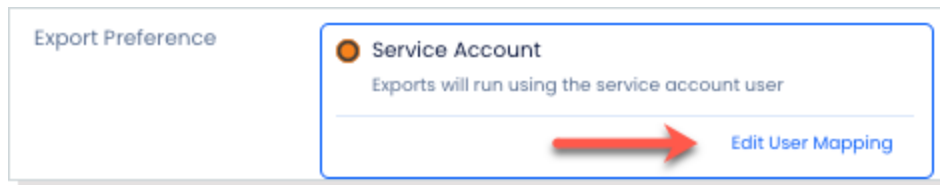
7. Return to the **Connected** tab and turn on the integration using the toggle.

Adding Users to Your Org Over Time

When you provision a new user in an organization that uses the **Service Account** option, verify the new user is mapped to their corresponding HubSpot user using the **Edit User Mapping** link on the **General Settings** page for the integration.
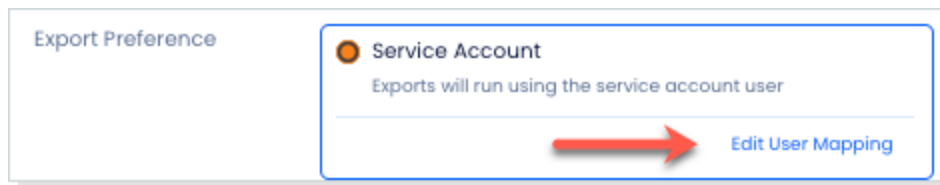
- If you do not proactively make the mapping, the system will automatically regenerate this mapping when the new user performs their first export.

- If the system is unable to map a user, the user can still perform exports as described in [Record Ownership When Exporting Using a Service Account Connection](#).

Data Sharing

The Data Sharing page in the Admin Portal is enabled if your organization has not contractually opted out of data sharing with ZoomInfo that is intended to analyze your use of connected integrations. Data sharing helps to improve the ZoomInfo service and make recommendations to you.

1. Go to **Admin Portal > Privacy & Security > Data Sharing**.

   - If your organization has chosen to opt-out of data sharing, the following message displays:

     As a precaution, this function is set to OFF and is not editable, in order to prevent unintended changes that may be in conflict with your organization's contractual terms.

   - If your organization has not opted out of data sharing, the **Data Sharing** page displays with the ON/OFF toggles enabled.

2. Data collection is subject to ZoomInfo's Privacy Policy. Review the policy details using the link provided.

3. Review and manage the data sharing settings according to your organization's data sharing preferences.

4. Over time, you can review the **Contributions** tab to monitor the contributions made by your organization.