



JazzHR Integration Guide for ZoomInfo Talent

For administrators setting up the ZoomInfo Talent integration with JazzHR

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ZoomInfo Talent helps recruiters find, organize, and connect with the right candidates using ZoomInfo's data. An admin can connect the JazzHR integration to enable their organization's recruiters to export candidates and manage them in JazzHR.

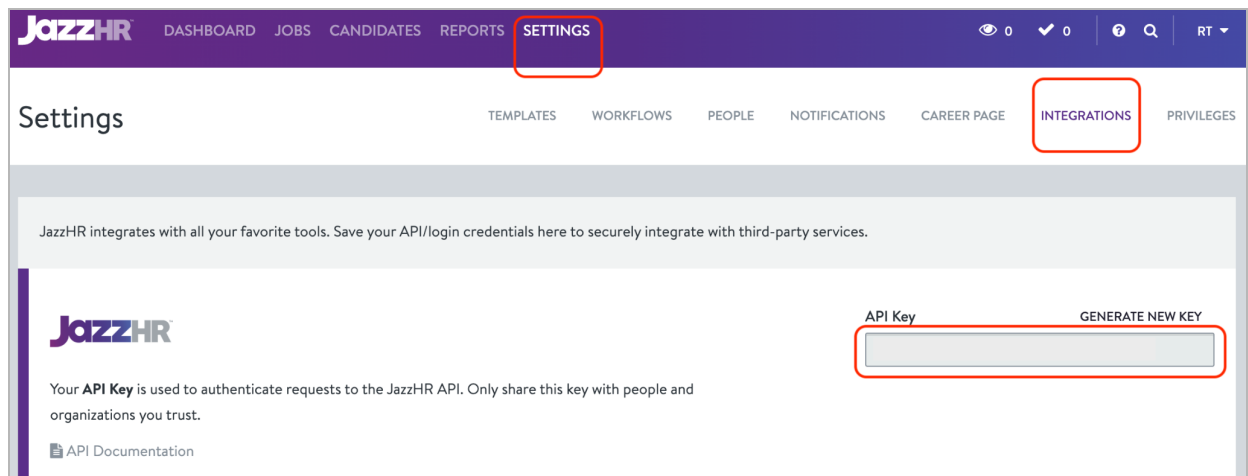
To get connected:

1. A ZoomInfo Talent admin establishes the connection to JazzHR using an API key and configures export and custom mapping settings for their organization.
2. The admin enables their organization's users to connect to JazzHR.
3. Users are connected to JazzHR and can begin exporting candidates.

Obtain the API Key from JazzHR

Only Super Administrators, Recruiting Administrators, or Developers have access to the JazzHR API Key.

1. Navigate to **Settings > Integrations**.



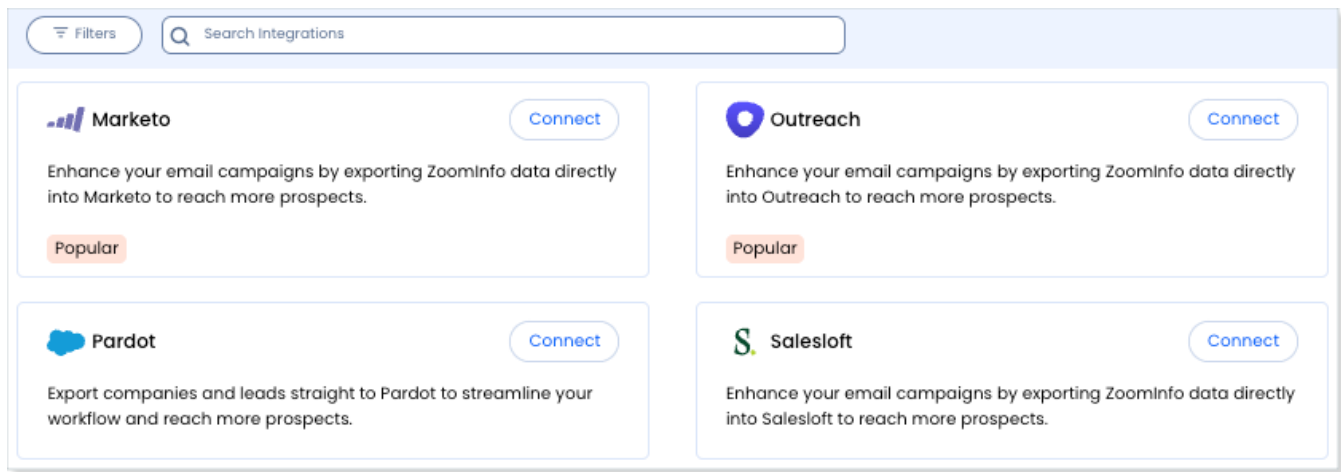
2. Copy your existing JazzHR API Key.

For additional information about the JazzHR API, [see this article](#).

Configure the Connection

With the API key in hand, and using the same JazzHR admin email address used to obtain the key:

1. Login to ZoomInfo and select **Admin Portal** from the waffle menu.
2. Click **Integrations > Connections** then click the **All Integrations** tab.



3. Use the **Filters**, or **Search integrations** options to find your integration.
4. On the tile for your integration, click **Connect**.
5. Paste your **API Key**.

A screenshot of a modal dialog box titled 'Connect to JazzHR'. The dialog has a close button (X) in the top right corner. Inside, there is the JazzHR logo and the text 'Connect Your JazzHR Account'. Below this, it says 'Please enter your API Key below'. There is a text input field labeled 'API Key:'. At the bottom of the dialog, there are two buttons: 'Cancel' and 'Connect JazzHR'.

6. Click **Connect JazzHR**.

Configure Integration Settings

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

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.

Actions

...

Settings

Delete

The **Settings** page displays.

JazzHR Settings | JazzHR

General

Connected Products

Product

Edit settings

Delete Connection

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

Configure Export Preferences

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

1. Click the **Export** tab.
2. Select the export options for exporting ZoomInfo contacts to JazzHR as Contacts.

Mapping Export

Save Changes

Export Preferences

Back to default preferences

Select which object types your users are allowed to export to JazzHR?

☒ Candidates

Max number of candidates a user can export to JazzHR at a time (up to 2,000): 2000

Create and Update Rules:

☒ Create new Candidates ⓘ

☐ Allow Candidate duplicate creation ⓘ

☒ Allow users to export candidates directly to job

Note: You can adjust the maximum number of records a user can export.

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

Configure Custom Mapping

Click the **Mapping** tab.

ZoomInfo Field	JazzHR Field	Example	Update Option
* First Name	First Name	e.g. Hila	Complete if missing
* Last Name	Last Name	e.g. Nir	Complete if missing
* Supplemental Email	Email	-	Complete if missing
* Email Address	Email	e.g. hila.nir@zoominfo.com	Complete if missing
Mobile Phone Number	Phone	-	Complete if missing
Person LinkedIn URL	LinkedIn Url	e.g. https://www.linkedin.com...	Complete if missing
Contact Street	Address	e.g. 307 Waverley Oaks Road, ...	Complete if missing

On the **Mapping** tab, use the **Contacts** tab to review the default mapping and make any changes.

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

Add or Remove Fields

Add fields by clicking **Add Row** at the bottom of the field list. Each field that you add must be mapped to a corresponding field in your integration.

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

Personal Phone and Email Mapping

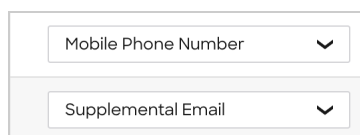
The default mapping for the JazzHR integration for ZoomInfo Talent is specific to talent acquisition use cases. For example, the phone and email mappings for contacts are focused on personal contact information instead of business contact information.

In ZoomInfo:

- A contact's business email address is stored in the **Email Address** field, and the personal address is stored in the **Supplemental Email** field.
- A contact's business phone number is stored in the **Phone** field, and the personal phone number is stored in the **Mobile Phone Number** field.

In ZoomInfo Talent:

Because recruiters typically want to engage with candidates through personal channels, we have included the **Mobile Phone Number** and **Supplemental Email** fields in the default mapping.



The image shows a UI element with two dropdown menus. The top dropdown is labeled 'Mobile Phone Number' and the bottom dropdown is labeled 'Supplemental Email'. Both have a downward arrow icon on the right.

If you want to also map the business email and phone number, you can click **Add Row** and map the ZoomInfo **Email Address** and **Phone** fields to corresponding fields in your integration.

Set a Hierarchy for ZoomInfo Data Within a Single JazzHR Field

In some cases, you may want multiple ZoomInfo fields to be stacked hierarchically within a single JazzHR field. For example, you want to import the ZoomInfo **Supplemental Email** (personal) and **Email Address** (business) fields into the JazzHR **Email Address** field.



The image shows a mapping interface with two rows. The first row has a dropdown labeled 'Supplemental Email' followed by a right-pointing arrow and a dropdown labeled '1 Email'. The second row has a dropdown labeled 'Email Address' followed by a right-pointing arrow and a dropdown labeled '2 Email'.

In this example:

- When contacts are exported to JazzHR, **Supplemental Email** will map to **Email**.
- If a contact has both a **Supplemental Email** address and business **Email Address** in ZoomInfo, the first occurrence of the JazzHR field will be denoted with number 1, and the second will be number 2.

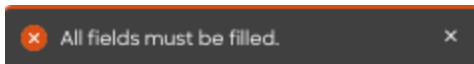
- If a specific contact does not have a **Supplemental Email** in ZoomInfo, we will send the business **Email Address** field to the **Email** field in JazzHR.

Test and Save

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

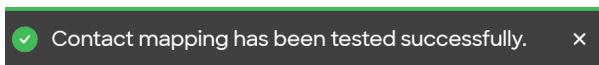


- If the test record cannot be created, this is typically due to an error in the mapping settings. For example, mappings cannot be saved with a blank field.



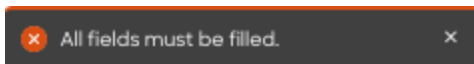
Adjust the settings and click **Test Mapping** again.

- If the test is successful, a notification displays.



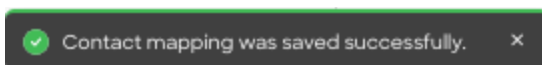
After performing a successful test mapping, click **Save Changes**.

- 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.



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.

Connected 19 All Integrations [+ New Integration](#)

To maximize your experience, ZoomInfo now connects with the apps and products your organization is already using. Search, add, and manage your integrations here.

Integration Name	Date Connected	Category	Actions
☒  PC Recruiter	Jun 13, 2022	ATS	...
☒  Salesloft	Oct 10, 2022	Sales/Marketing	...
☒  HubSpot	Oct 31, 2022	CRM	...
☒  Salesforce	Dec 2, 2022	CRM	...

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.

Enable User Connections

The authentication between ZoomInfo Talent and JazzHR is done at the organization level. As an admin, once you establish the connection and turn it on for all users, your organization's users are automatically connected and can export to JazzHR.

1. Add your organization's users under **Admin Portal > User Management > Users**.
2. Under **Admin Portal > Integrations > Connections**, toggle on the JazzHR integration from the **Connected** tab.

All users listed under **Admin Portal > User Management > Users** are automatically connected to JazzHR and can export candidates as JazzHR Candidates or add them to a Job.