# Microsoft Dynamics Integration Guide

For administrators setting up the ZoomInfo integration with Microsoft Dynamics 365

ZoomInfo admins enable the Microsoft Dynamics integration for users and control user preferences including export settings, custom mappings, and data sharing settings. ZoomInfo users can then connect to Dynamics using their credentials.

# Permissions and Considerations

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

## Global Admin Requirement

For all team members to utilize this integration, the person establishing the connection must be one of the following:

- A Dynamics admin with Microsoft Global admin permissions
- A Dynamics admin who has coordinated with a Microsoft Global admin to grant prior permission to connect the ZoomInfo integration in the Azure portal. The Dynamics admin can then complete the connection.

## Permissions

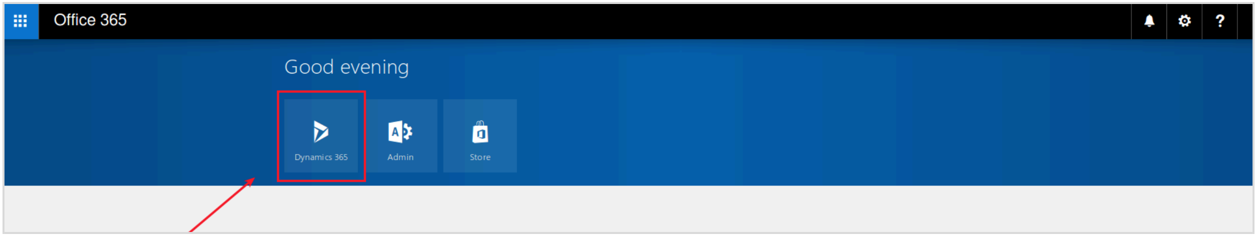
The following permissions are needed in Microsoft Dynamics:

- Read/write access to the Account, Contacts and Lead objects
- Read access to the Opportunity, Product, System User, Event, and Task objects

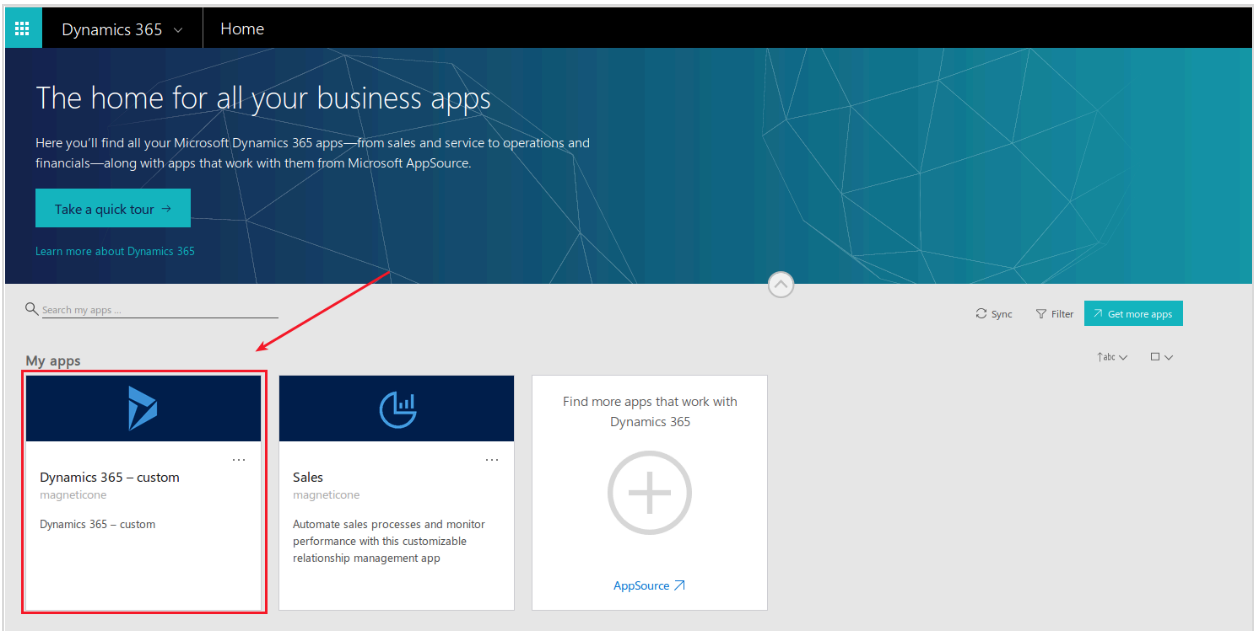
## Identify Your Organization URL

You'll need to provide your Dynamics Organization URL as part of making the connection. To obtain this URL:

1. Sign into your Microsoft Dynamics CRM account.
2. Click **Dynamics 365**.




3. Go to **My App** and click **Dynamics 365 - custom**. You are redirected to your Microsoft Dynamics CRM.




4. Go to your browser address bar and copy the link address (from the beginning of the URL and excluding `/main.aspx/`).

# 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 export mapping between ZoomInfo data fields and Dynamics fields and behavior for each field when exporting.
5. Configure Dynamics Import, which is enabled by default to allow ZoomInfo to import and analyze information about your team and prospects/customers from Dynamics.
6. Configure Dynamics Advanced Search Filters which enables object filters for your organization's users.

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 Dynamics, you must configure how you connect to Dynamics 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 Dynamics 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 *Dynamics Global Admin* or have the permissions described in Permissions and Considerations.
- All exports and Dynamics Filtering jobs will be run using this account.
- Other ZoomInfo admins and users will not need to connect to Dynamics using their own credentials.
- Assuming your org's ZoomInfo user accounts match to Dynamics 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 Dynamics is considered the primary connected admin.
- Only the primary connected admin can disconnect the connection to Dynamics.
- Any other ZoomInfo admins defined in your organization can manage the configuration settings such as adjusting mapping and export settings. However, these admins cannot directly disconnect the connection to Dynamics.

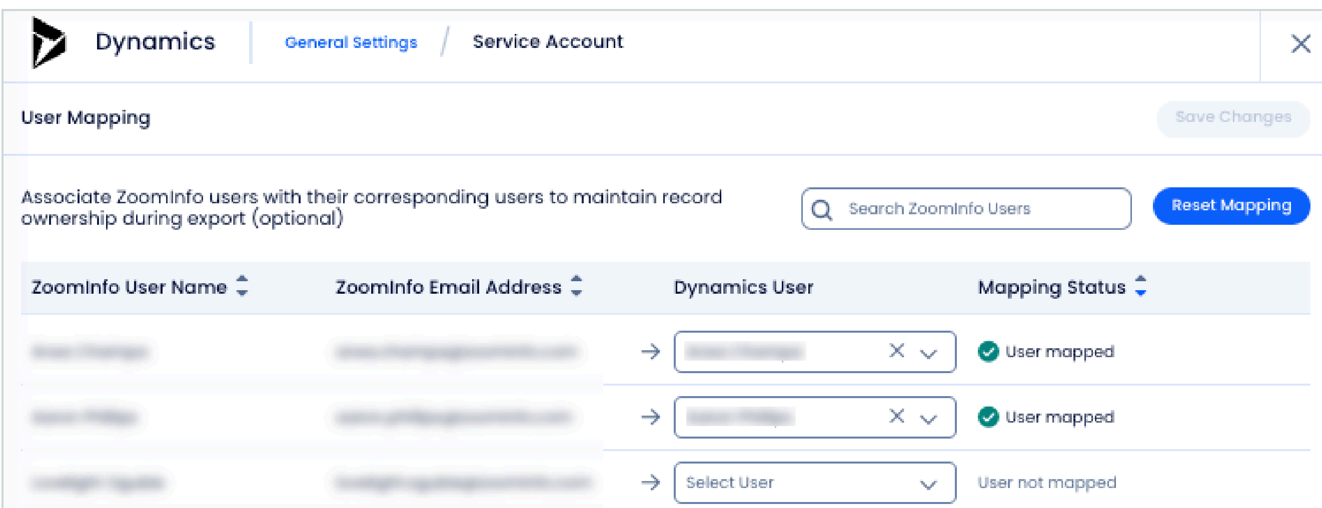
#### Secondary Admins

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

- Can view the existing Dynamics integration configured for the org without connecting their own Dynamics account to Zoominfo.
- Can manage the configuration settings such as adjusting mapping and export settings.
- 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 [Dynamics permissions](#) as the previous user.
- Cannot directly disconnect the connection to Dynamics. However, a secondary admin can become the primary admin by using the **Change User** option on the **General Settings** page for the integration.

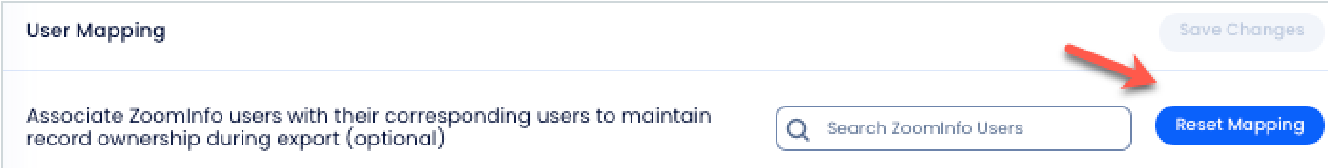
## ZoomInfo and Dynamics User Account Mapping

It's important that your ZoomInfo users map to Dynamics users to ensure proper record ownership assignment when using the Service Account connection option. This preserves ownership in Dynamics 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 Dynamics 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 Dynamics user email address**:

- The record **Owner**, **Created By** and **Last Modified By** 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 Dynamics.

## Individual User Account Connections

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

- Ensure that your org's users have the required permissions in Dynamics.
- You'll still need to make the initial admin connection for the integration using the required Dynamics 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 Dynamics, each user must connect to Dynamics using their own credentials.

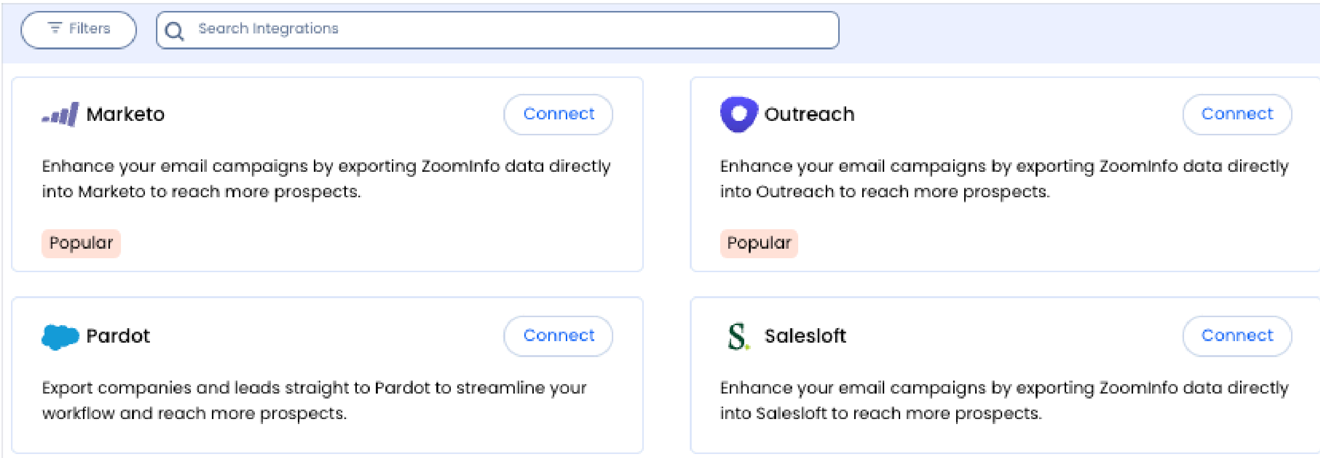
- Once you have enabled the integration for all users by clicking the toggle to the left of the integration in the Admin Portal, individual ZoomInfo users can connect to Dynamics.

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

# Get Connected

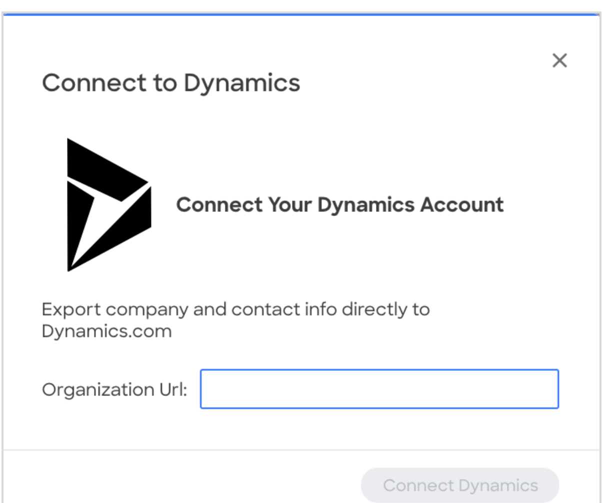
A ZoomInfo admin with Microsoft Global admin privileges establishes the integration with Dynamics that enables ZoomInfo users to connect and export data to Dynamics.

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. Enter the **Organization URL** found on the Developer Resources page in Dynamics.

   **Note**: If you're not sure where to find the **Organization URL**, see [Identify Your Organization URL](#).




5. Sign in with your Dynamics credentials.

6. Grant access to all users to be able to connect to Dynamics from ZoomInfo. You will need to be a Microsoft Global admin to do this.

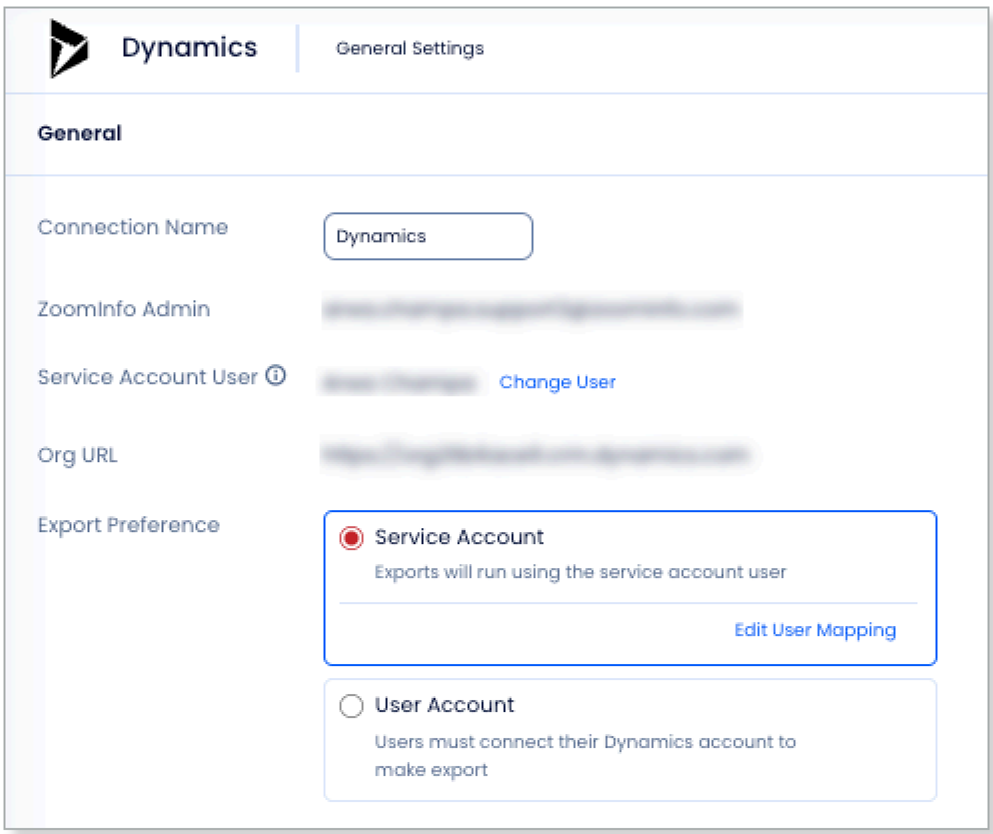
   A success message displays.

## 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.

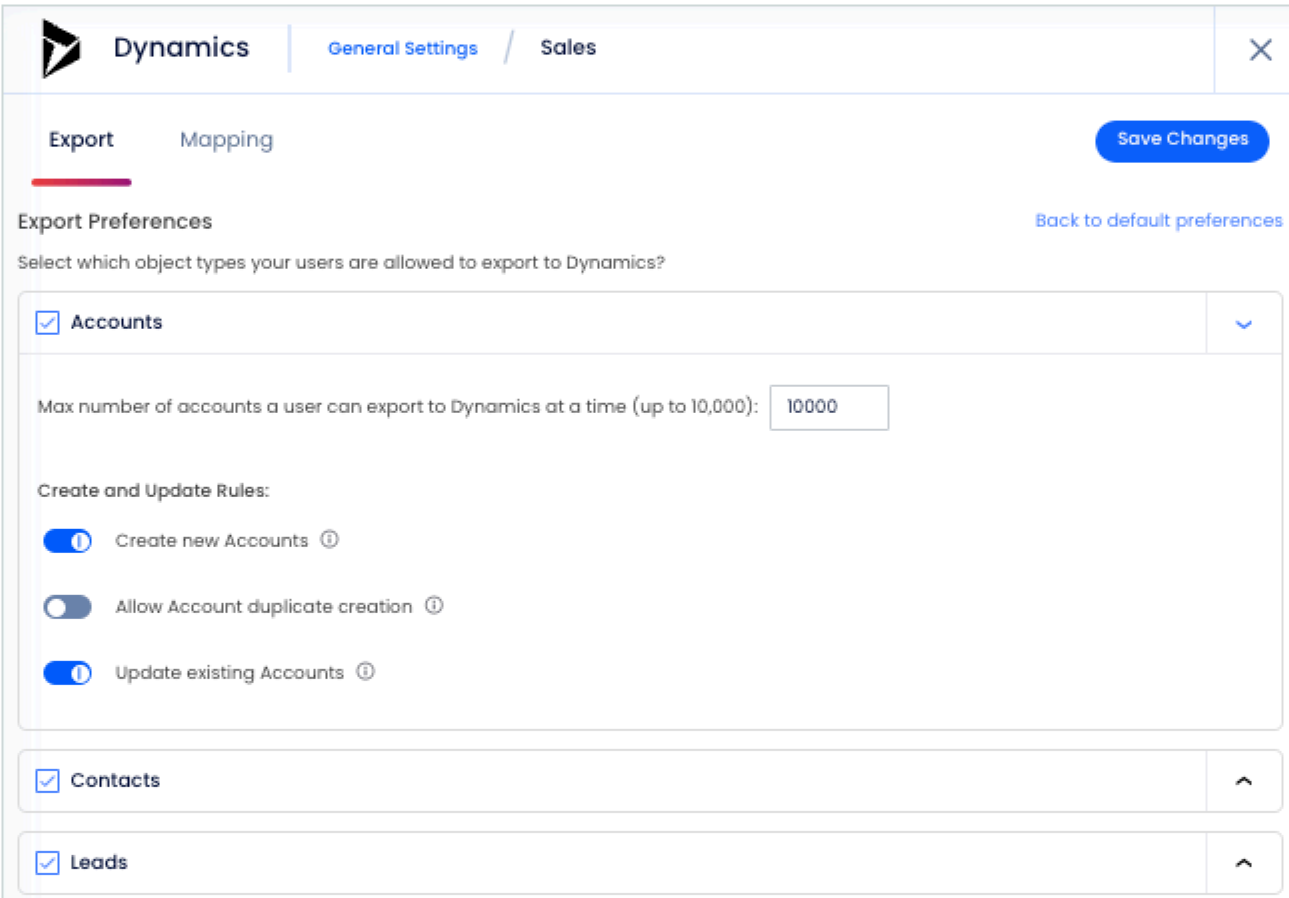



From this page, click **Edit settings** to begin configuring your integration.

## 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 Dynamics.



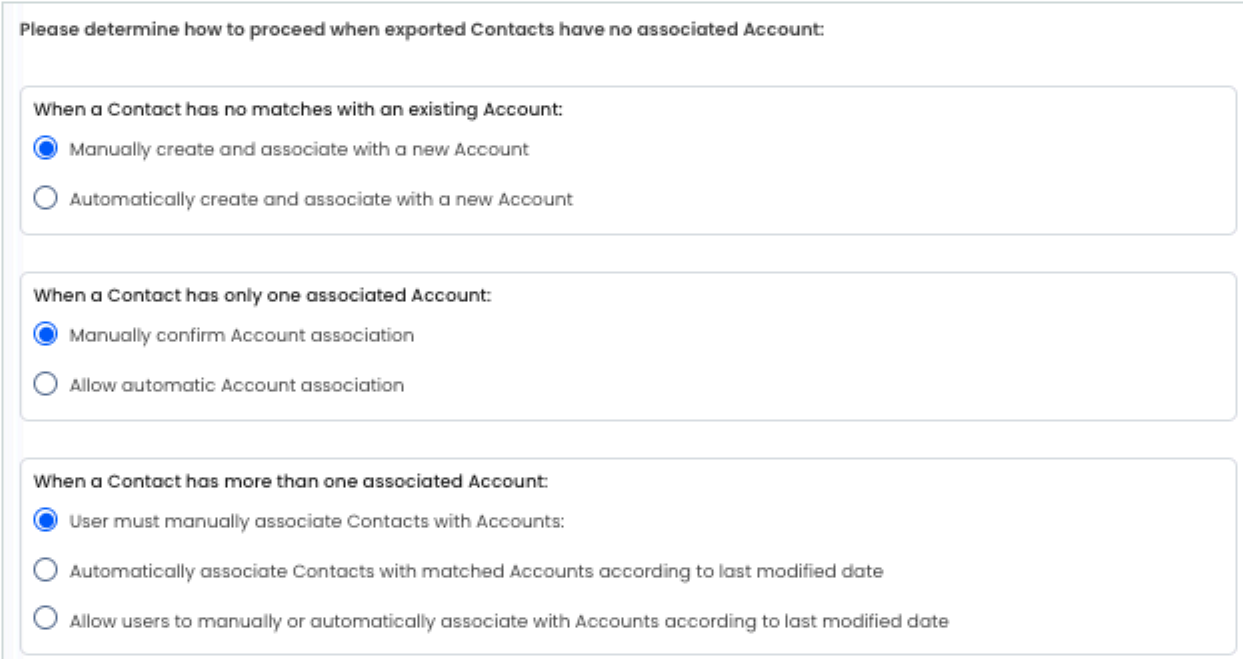

3. For each object type, set a maximum number of records a user can export to Dynamics at one time (up to 10,000).

   **Note**: For the Contacts object, ensure that you review the export considerations below for details on the impact and expected behavior of account association settings.

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

**Export Considerations**

For the Contacts object, you have a few options in how account association logic is applied when your organization's users export ZoomInfo contacts to Dynamics.

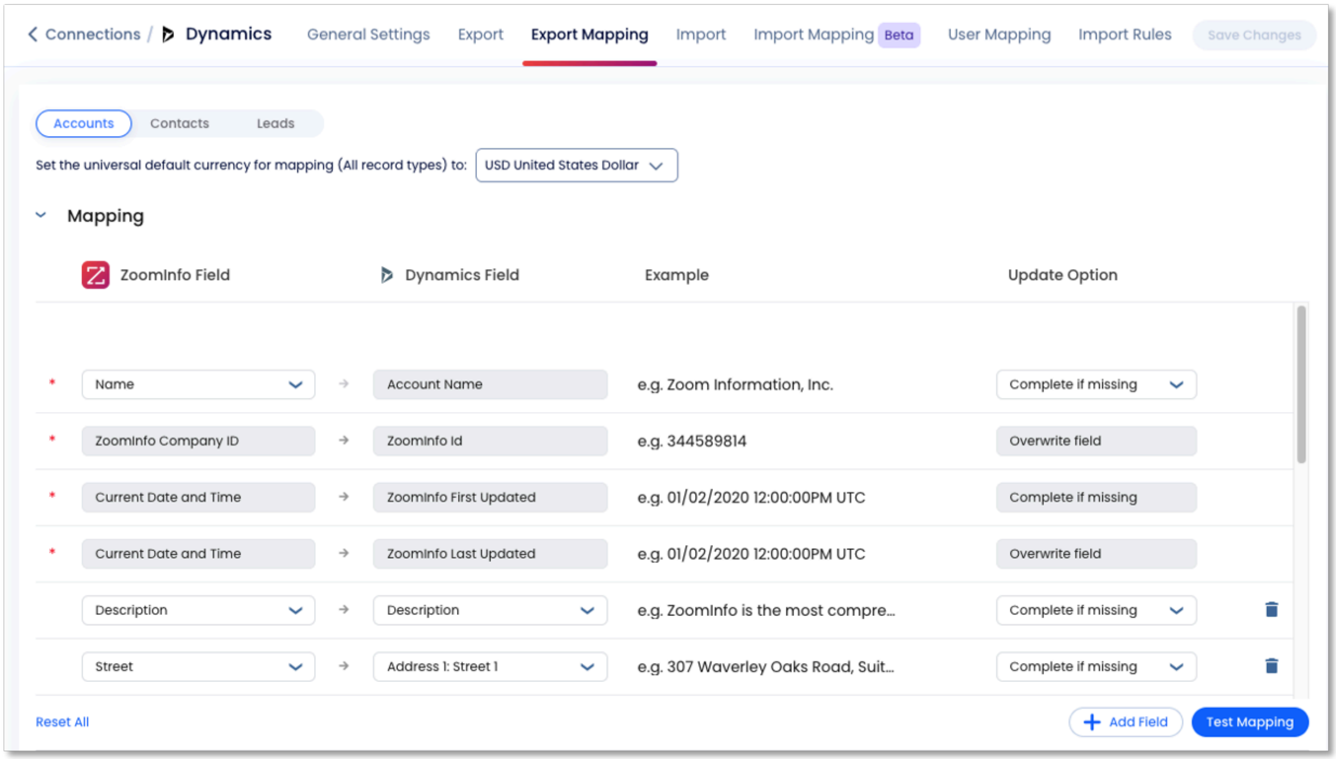



ZoomInfo recommends that you set account association options to "manual" (which is the default for all three options), and let the user determine the account association when exporting contacts. Using these options:

- If an account does not exist, the user is asked to confirm the creation of the account. If confirmed, ZoomInfo will assign the contact to the newly created account.
- If only one account exists, the user is asked to confirm that they want to associate the contact with that account.
- If we match on multiple accounts, the user is asked to choose the account with which they want to associate the contact.

# Configure Export Mapping

With your integration successfully connected (but not yet turned on for your organization), you can configure and customize export mapping.




On the **Export Mapping** tab, use the **Accounts** and **Contacts**, and **Leads** 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 (*). |
| Dynamics Field | Available Dynamics fields. These fields are retrieved directly from your Dynamics instance. |
| Update Options | Select an option:<br>• **Complete if missing** (default) - Only complete with ZoomInfo data if none exists in Dynamics.<br>• **Overwrite field** - Overwrite existing data in Dynamics 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.

**Important:** If you are mapping to a picklist field (dropdown select) in Dynamics, you will want to take into account the internal values for each option.

## Set a Hierarchy for ZoomInfo Data Within a Single Dynamics Field

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

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

## Test and Save

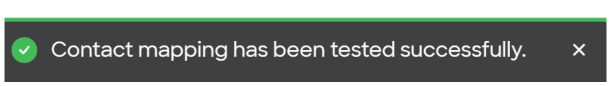
Before saving your mapping changes, click **Test Mapping** to export and delete a test record using your current settings.


- 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.

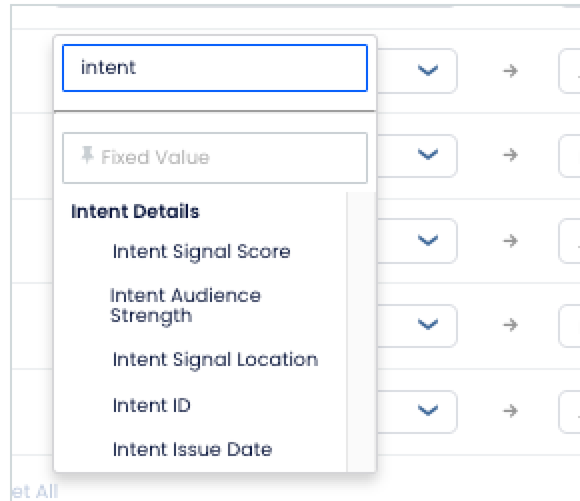
  
  

After performing a successful test mapping, click **Save Changes**.

- 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 Dynamics and map ZoomInfo Intent data points to write data to these fields when a company is exported.



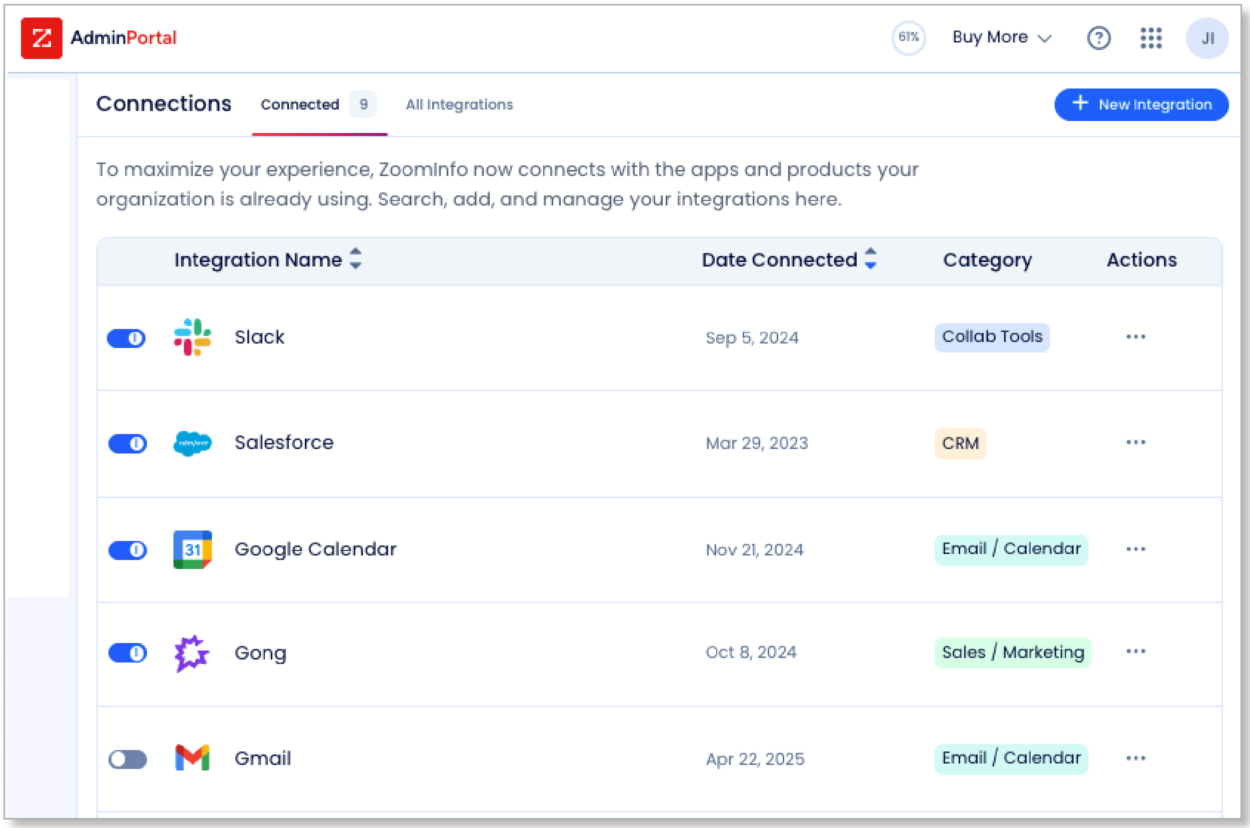

There are five ZoomInfo Intent data points:

- 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 Dynamics 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.




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 Dynamics, duplicate checking logic is applied to avoid creating duplicate records within Dynamics.

## 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 Dynamics matches data being exported.

**For companies**: Companies in ZoomInfo are equivalent to accounts in Dynamics. When exporting companies to Dynamics, ZoomInfo will check for duplicate Dynamics accounts using criteria applied in the following logical order:

1. ZoomInfo ID
2. Exact Company Name
3. Exact Company Website

**For people**: People in ZoomInfo are designated as contacts, and can be exported as Dynamics contacts or leads.

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

Contacts (people associated with a company)

1. ZoomInfo ID
2. Email Address
3. Exact First Name + Exact Last Name + Exact Company Name

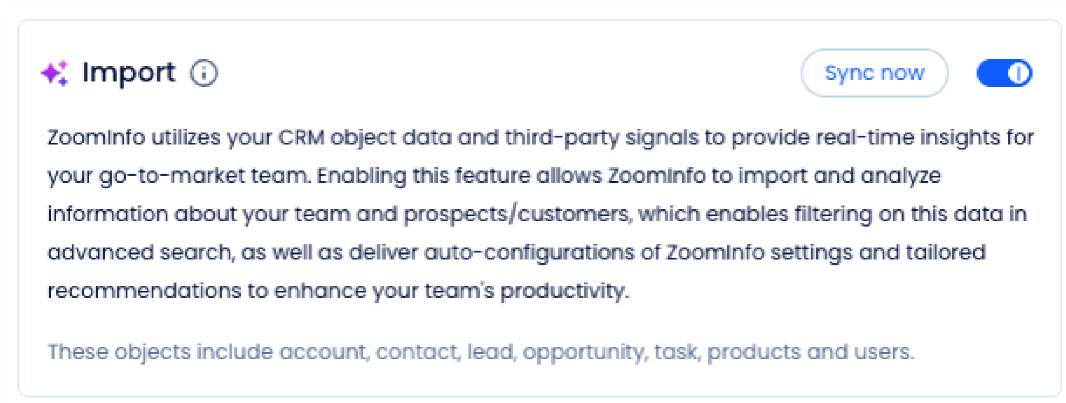
Leads (people not associated with a company)

1. ZoomInfo ID
2. Email Address
3. Exact First Name + Exact Last Name + Exact Company Name

**Note**: If a person in Dynamics exists as both a contact and a lead, ZoomInfo will present the contact record as the duplicate.

## Dynamics Import

ZoomInfo utilizes your Dynamics data to provide timely insights for your go-to-market team. When you connect the Dynamics integration, the Import toggle is enabled by default.




For the optimum user experience, it's crucial that ZoomInfo has read access to all fields for the specified objects.

### User Experience

Here are some of the enhancements delivered when Import is enabled for your Dynamics integration with ZoomInfo:

- **Comprehensive Data Integration**: ZoomInfo aggregates extensive Dynamics 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**: Certain ZoomInfo products utilize 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 Dynamics data.
- **Enhanced Personalization**: ZoomInfo 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 Dynamics, facilitating a user-friendly experience for building advanced searches.
- **Signal Routing**: When a funding signal from ZoomInfo intersects with your org's Dynamics data, ZoomInfo can route this signal precisely to customers whose solutions align with the growth objectives of these freshly funded companies.

## Import Object Access

ZoomInfo 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 Dynamics. 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, ZoomInfo should have read access to the following objects in Dynamics.

- Account
- Contact
- Lead
- Opportunity
- Product
- Task
- User

For each Dynamics 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 Dynamics objects and fields.

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

## API Consumption

Import only queries the incremental records that were updated since the last run (currently runs hourly) other than when a full sync is required (see backfill section below). Dynamics provides a limit for the number of API calls which can be used by an organization.

- Check with Dynamics Support to confirm how many API calls your organization has access to (daily limits).

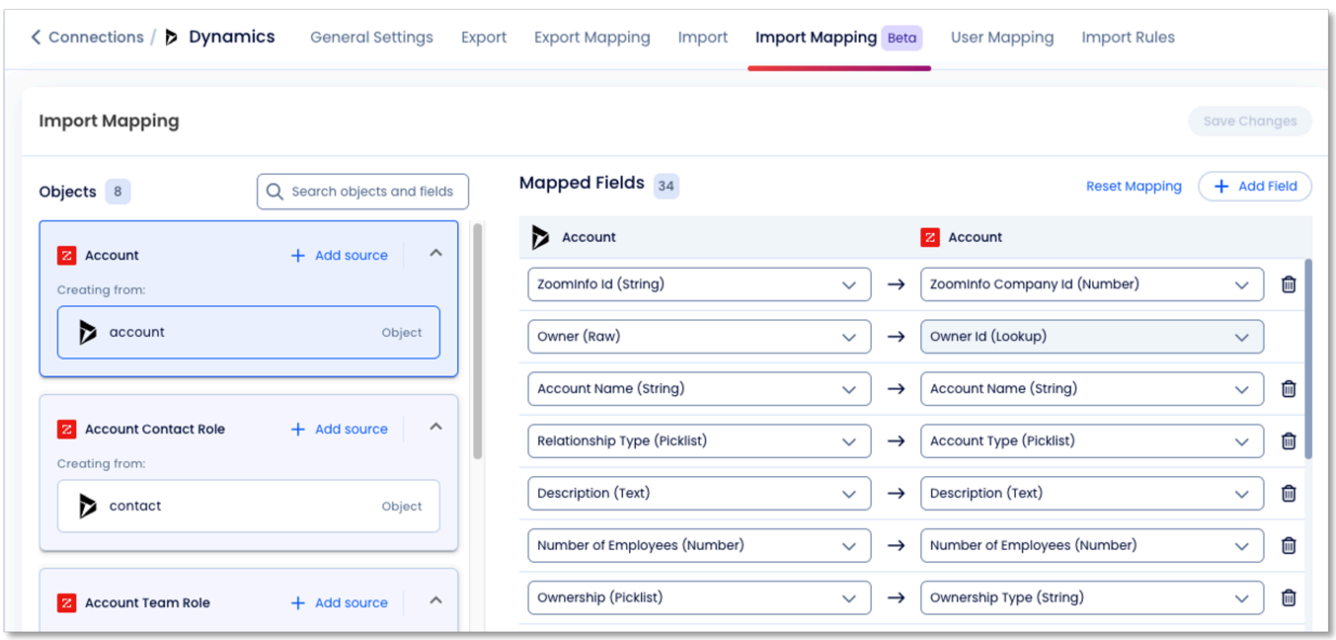
- Backfill Syncs: ZoomInfo runs backfills when all records must be updated in ZoomInfo due to: initial connection, import mapping changes, import rule changes, 'Sync Now' button pressed for a prioritized full backfill - used in troubleshooting. Otherwise, ZoomInfo only runs incremental syncs to ensure API consumption is at a minimum.

## Import Mapping

ZoomInfo maps default Dynamics Objects and fields to ZoomInfo's GTM Data Model Objects and fields to ensure your data is normalized and AI-ready to power ZoomInfo's product suite. However, if your organization instead uses custom objects or fields, these default mappings can be updated.

### Custom Fields

Use the drop down to update the default field mapping. Additional fields without default mapping can be found through the "Add fields" button and using the search on dropdown.

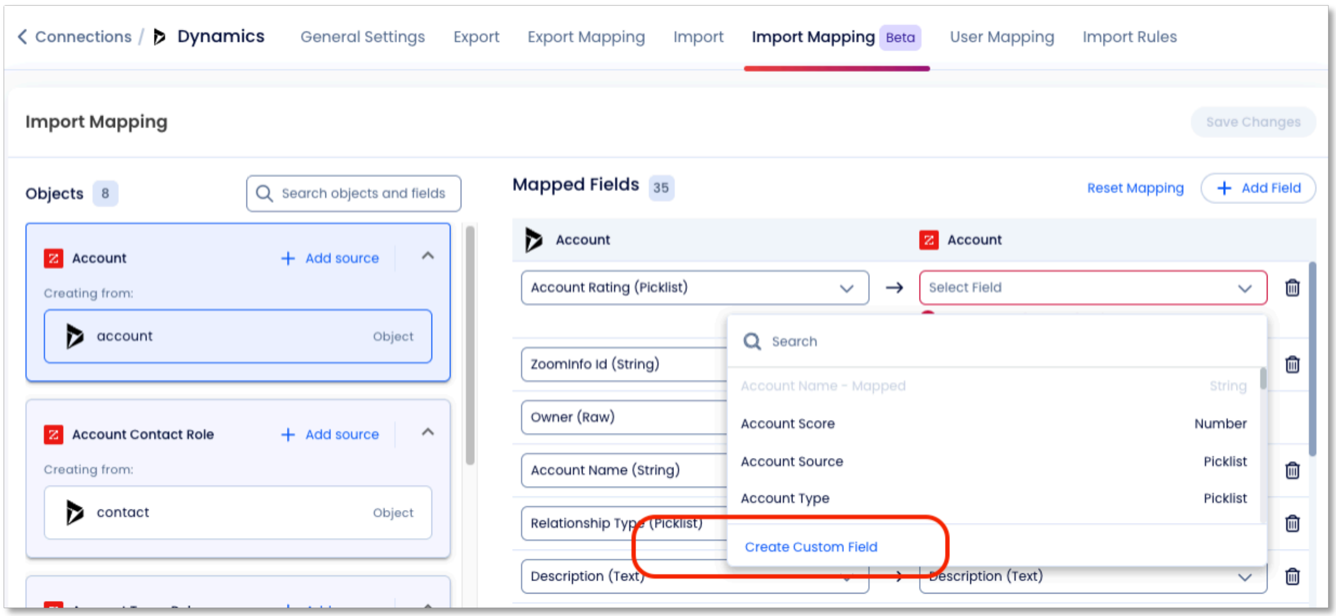



Key ZoomInfo GTM Data Model fields to check against Dynamics field mapping:

- **Account:** Account Name, Account Type, Annual Spend (Current ACV), Domain, HQ Phone, Owner Id, Website, ZoomInfo Company Id
- **Contact** (for Dynamics Lead and Contact)**:** First Name, Last Name, Do No Email, Email, Job Title, Department, Mobile Phone, Owner Id, ZoomInfo Contact Id

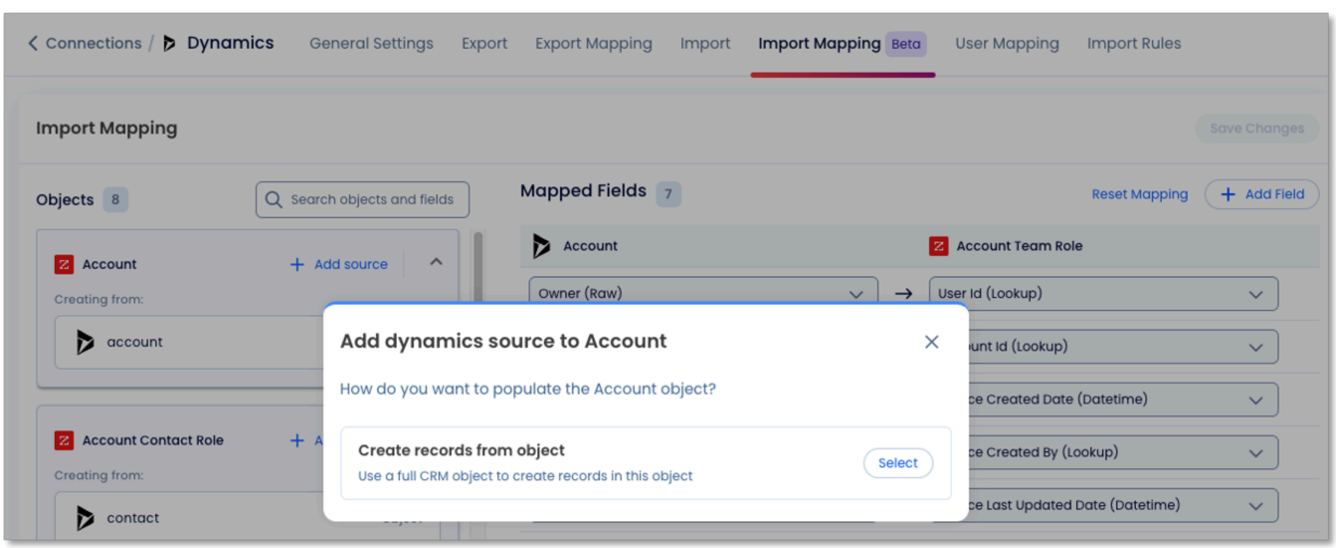
- **Opportunity:** Account Id, Amount, Close Date, Currency, Is Closed, Is Won, Opportunity Name, Owner Id, Stage, Type

**Custom GTM Data Model Field Creation & Mapping:** If you want to use a custom field in Import Rules (see section below), GTM Studio, or in other ZoomInfo products that does not align well to the standard fields offered on ZoomInfo's GTM Data Model, you can click **Add Field**, select the Dynamics field in the dropdown, and click **Create Custom Field** on the ZoomInfo GTM field dropdown.

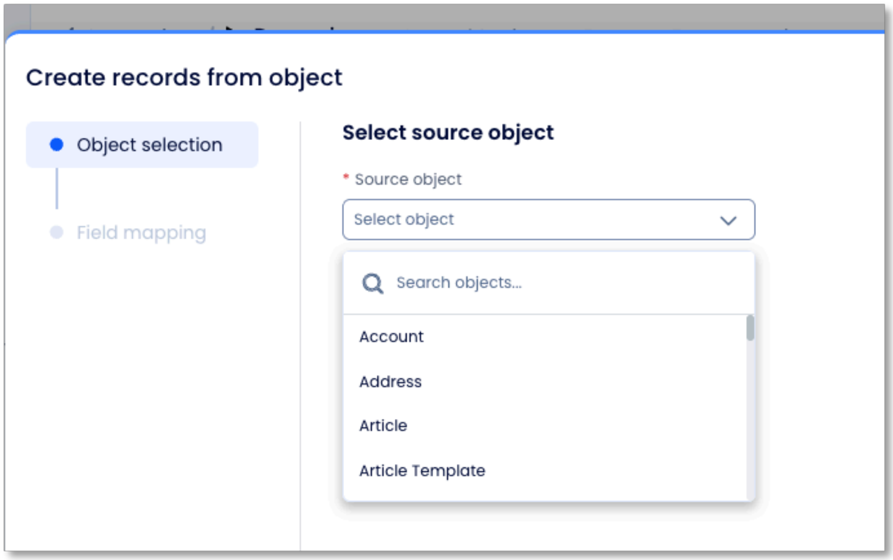



## Custom Objects

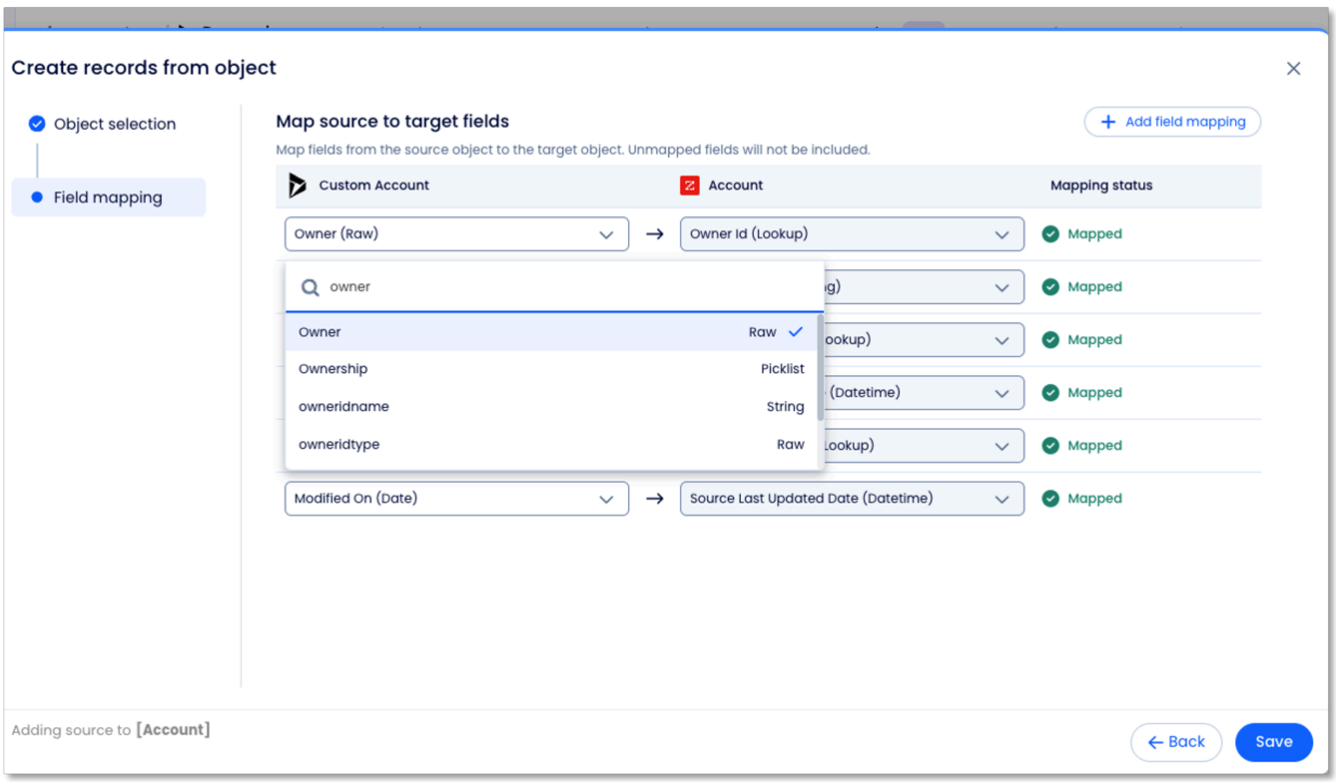
To replace a standard Dynamics Object with a custom Dynamics Object, click **Add source** on the target GTM Data Model object and select **Create records from object**



Then, select the custom Dynamics object from the dropdown and click **Next**.




Last, map all of the relevant fields and click **save**.

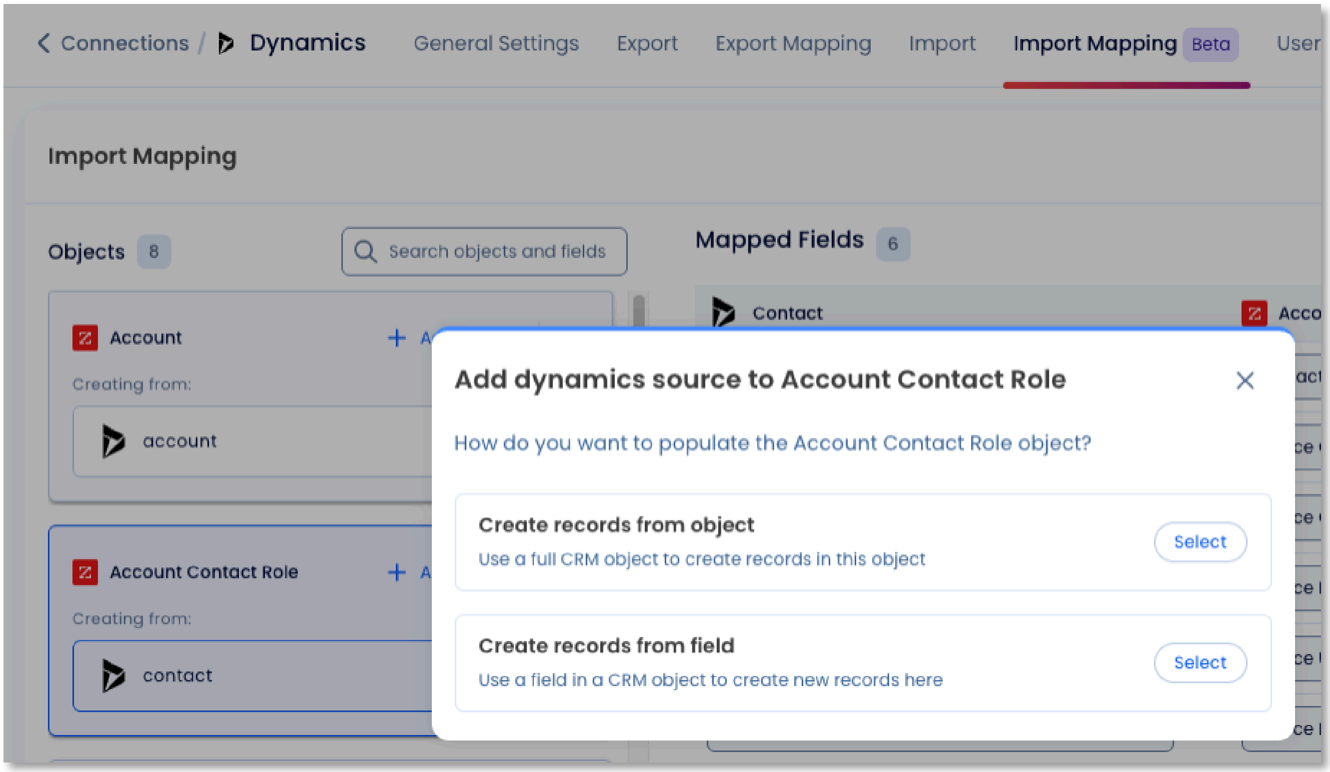



**Note:** While custom Dynamics Objects can be mapped to GTM Data Model objects, this data won't appear in Advanced Search Filters.

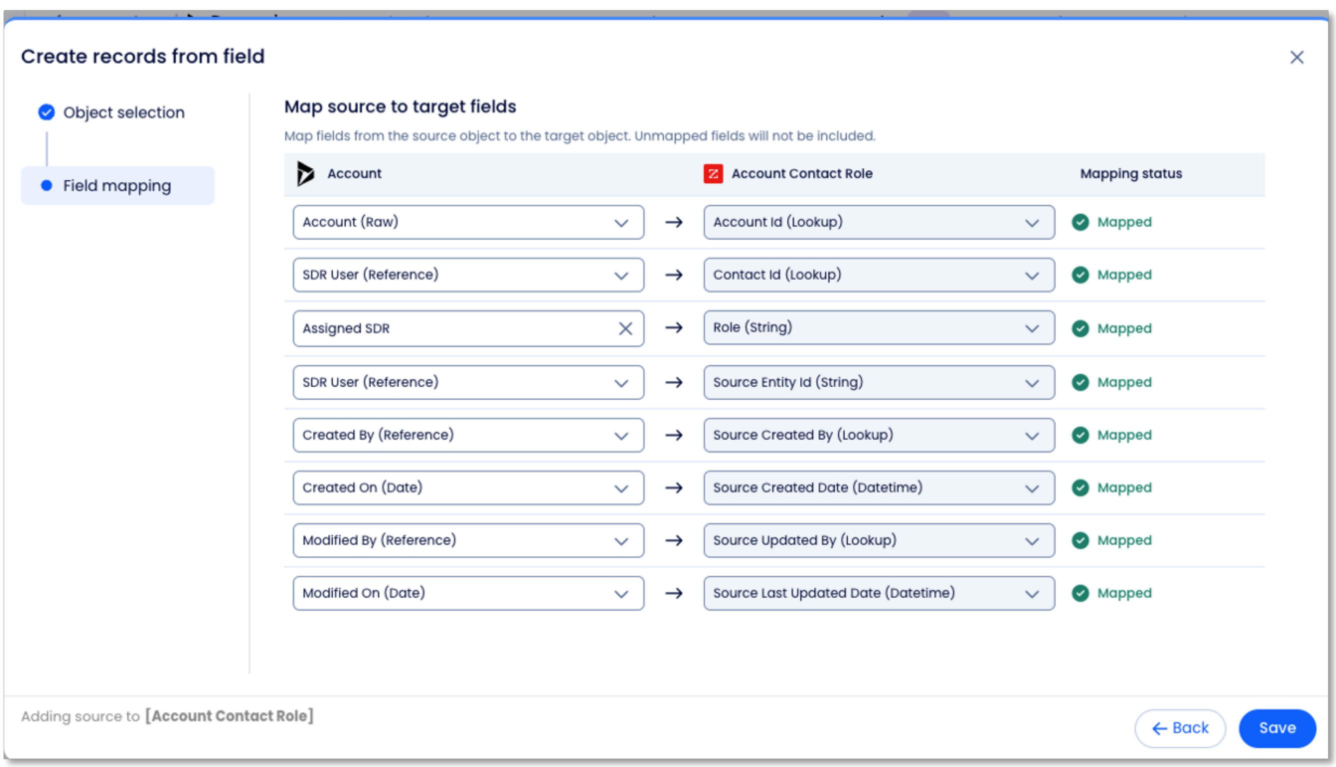
## GTM Role Records from Fields

To support customers who store role information (such as Account Team roles) in custom fields, we allow users to map these fields into the corresponding GTM role object.

On a GTM Role object, click **Add source** and select **Create records from field**.




Select the object where the field exists, click **Next**, and map the two Id fields. The **Role** field autopopulates with the field name, but can be rewritten with a more human-friendly name. Once mapping is done, click **Save**.

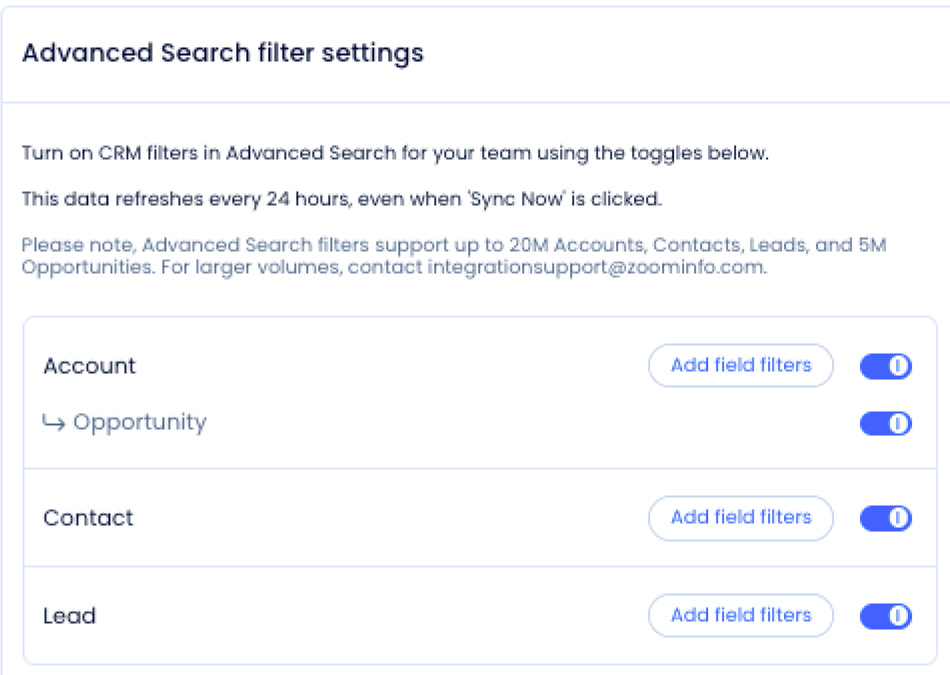


## Import Rules

We know CRMs can be filled with data that isn't as relevant to your current GTM efforts. To exclude non-relevant records from being saved in ZoomInfo, create an import rule from the **Import Rules** tab. See our knowledge article on [How to set up Import Rules](#).

## Advanced Search Filter Settings (ZoomInfo Sales and Marketing)

Organizations with ZoomInfo Sales or Marketing can choose which Dynamics Search Filters are presented to users. By selecting **Add field filters**, you can make up to three custom Dynamics fields available as filters in Advanced Search and Intent Search for Dynamics accounts, contacts, and leads. These fields must be either picklist fields or lookup fields to a contact, lead, account, opportunity, or user.




## User Experience

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

Once you toggle an object filter, ZoomInfo users can use the Dynamics filters in Advanced Search to search for account, contact, and lead records using the following criteria:

- **Account records**: Include or exclude based on account ownership or account type. You can also filter accounts based on **Opportunity** data in Dynamics.
- **Contact records**: Include or exclude based on contact ownership with an option to exclude contacts who have opted out of email.

- **Lead records**: Include or exclude based on lead ownership and status with an option to exclude leads who have opted out of email.

With the filters, users can:

- Include all owners to see all of the records matched from Dynamics, or exclude all records matched from Dynamics.
- Select up to 10 owners for each object type when filtering.
- Create saved search alerts based on Dynamics ownership, helping users maintain a narrow focus on prospecting efforts.
- See indicators that a record exists in Dynamics 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 Dynamics record in a new tab.
- See indicators that a record exists in Dynamics when viewing Scoops and Org Charts.

## Key Considerations

**Per object limits**

There is a 20 million record limit for account, contact, and lead imports and 5 million record limit for opportunity object types. For larger volumes, please contact integrationsupport@zoominfo.com.

**Data updates daily**

While Dynamics Import data refreshes more frequently, the data in Advanced Search filters is refreshed every 24 hours.

**Duplicate records**

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

# Configure CRM Writeback (ZoomInfo Copilot)

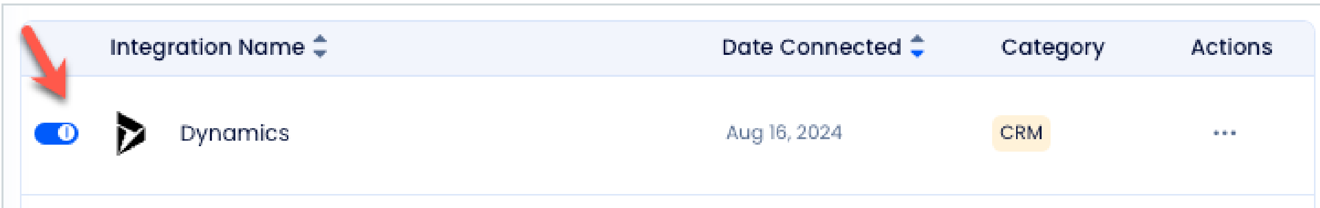
CRM writeback is a feature for ZoomInfo Copilot organizations that:

- Allows engagement activities such as emails, calls, and meetings conducted through Copilot to be automatically logged to your connected Dynamics system.
- Lets admins choose to log activities as tasks or events, enabling better activity tracking and linking engagement directly to Dynamics 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 Dynamics with their own credentials to be able to export.
  - Admins should share the following link with users for instructions on how to connect to Dynamics.

## 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 become the new primary connected admin:

1. Go to the **General Settings** page for the integration.
2. Ensure the new admin has the same Dynamics permissions as the outgoing admin.
3. Click **Change User**. If the secondary admin is:
   - Already logged in to Dynamics in another browser or tab, the account is simply switched.
   - Not logged in to Dynamics, they'll need to authenticate using their credentials.

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

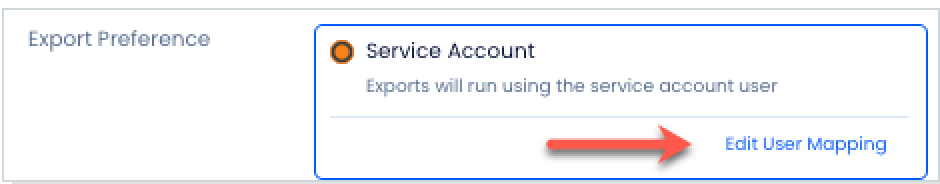
## Switching from User Account Option to Service Account Option

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.

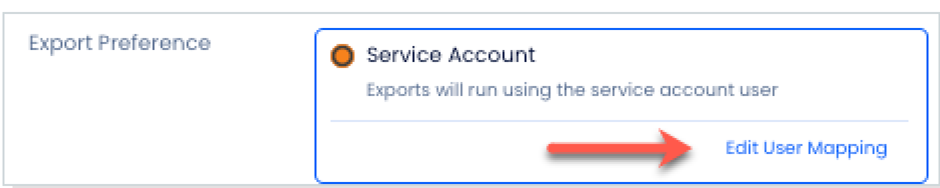
6. Verify the user mapping configuration to ensure your org's users are mapped to Dynamics users by clicking **Edit User Mapping**.




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 Dynamics 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.