



2025 ZoomInfo Marketing Release Notes

These release notes describe new features and improvements for 2025 ZoomInfo Marketing releases

Current Release

[Jun 17, 2025](#)

Our user experience continuously evolves. Over time, descriptions of new features and enhancements in these release notes may no longer accurately reflect the current user experience. Visit the [ZoomInfo Knowledge Center](#) for public content that supports the current functionality.

Previous Releases

[May 20, 2025](#)

[Apr 15, 2025](#)

[Mar 18, 2025](#)

[Feb 19, 2025](#)

[Jan 22, 2025](#)

[2024 \(All Releases\)](#)



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Jun 17, 2025 ZoomInfo Marketing Release

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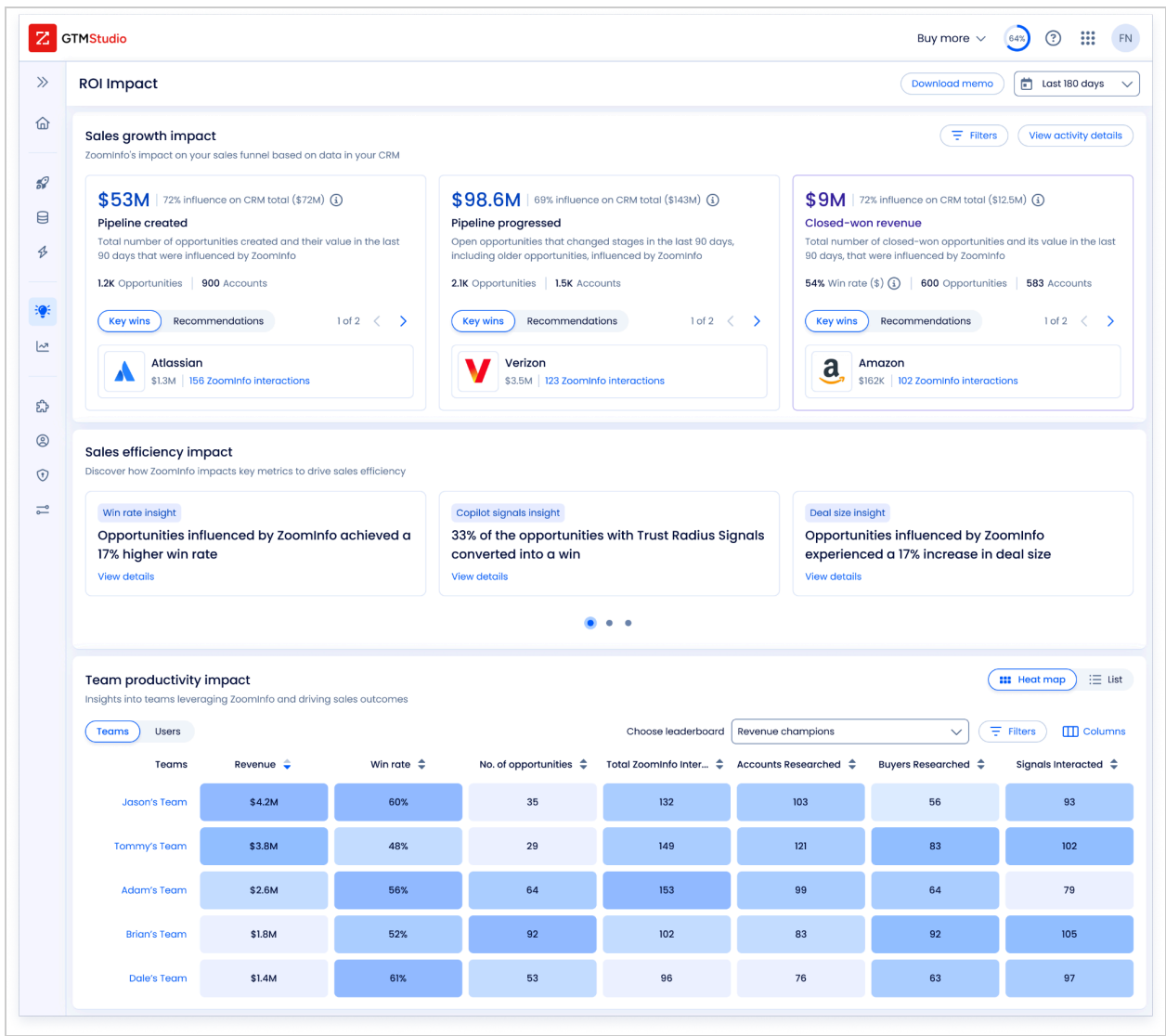
Go-To-Market ROI Dashboard

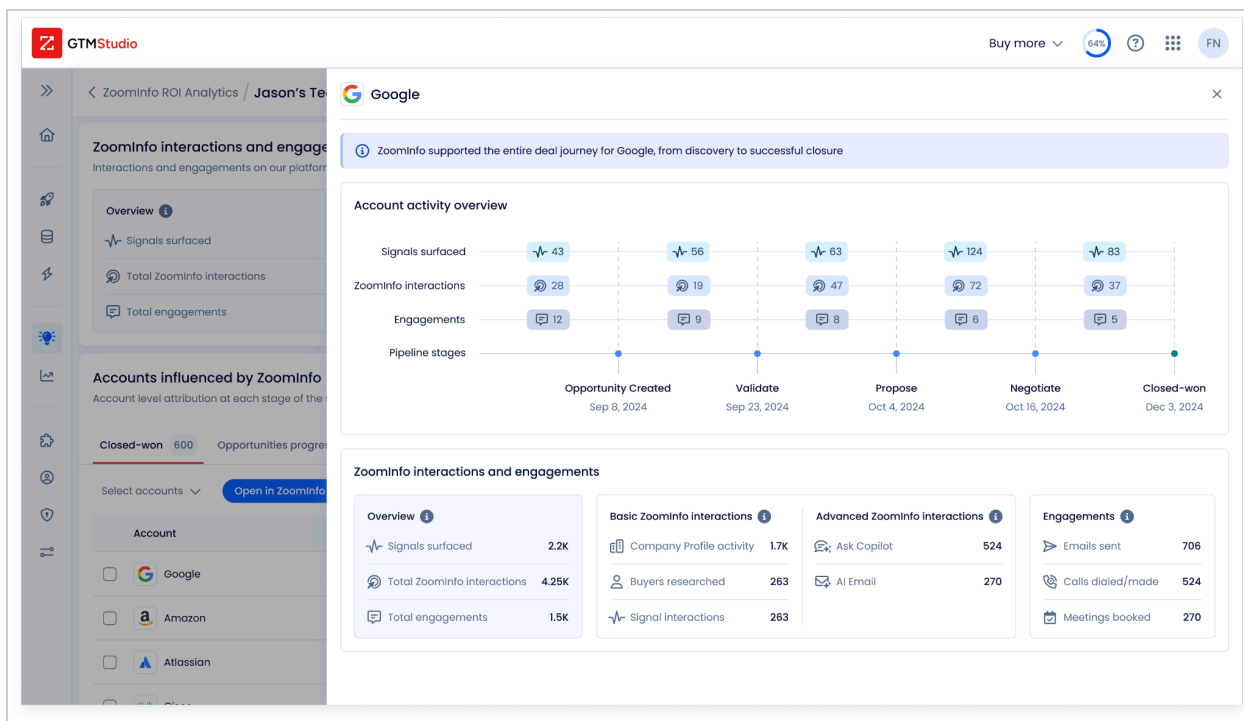
Connect ZoomInfo usage directly to closed revenue with analytics that show which interactions, signals, and team behaviors actually drive deals forward. Track the complete GTM workflow: marketers configure intent topics and signals in ZoomInfo Marketing, campaigns generate signals that flow into Copilot for sales activation, and the dashboard shows which signals get actioned by whom and what opportunities result.

Previously, proving ZoomInfo's business impact required manual CRM analysis and spreadsheet work that took hours to generate basic ROI reports. Now teams can see which specific signals and intent spikes rolled up to closed opportunities, who's taking action on signals and their conversion rates, and complete attribution from marketing campaigns through sales execution to deal close. This dashboard serves both revenue leaders building board-ready impact reports and RevOps teams identifying which signals drive sales performance, optimizing tool adoption across teams, and refining ICP based on what actually closes deals.

Use Case Tags: ROI Analytics, Account Insights, Deal Management, Account Prioritization

Primary Personas: Sales Leaders, Revenue Operations





Unified Account Intelligence Across Marketing and Sales

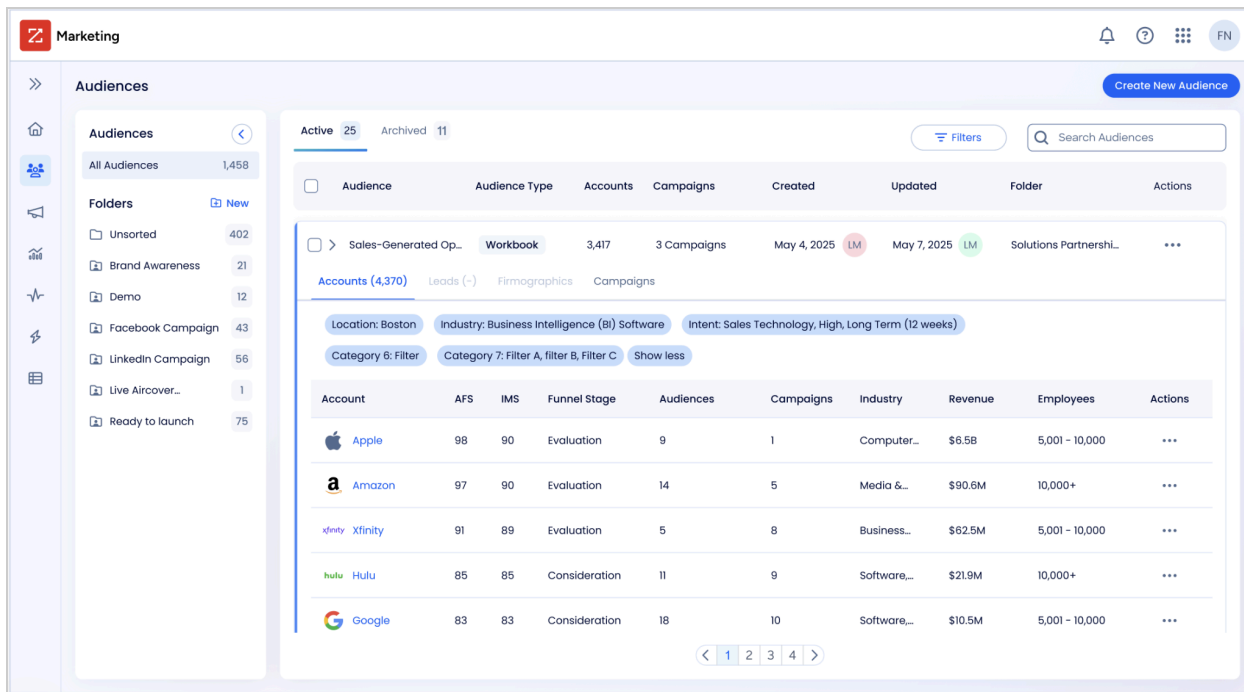
Use your team's qualified account research directly in marketing campaigns without recreating lists or losing strategic context. When RevOps builds high-value account lists with complete scoring and intelligence in GTM Studio, marketing can activate those exact accounts in campaigns immediately instead of spending days recreating segments.

This eliminates the broken workflow where RevOps builds target account lists and marketing rebuilds the same segments using different data sources. Now both teams work from the same unified account intelligence combining first-party CRM data with ZoomInfo's third-party insights.

RevOps users can click "Publish to Marketing" on any GTM Studio workbook, and these appear as ready-to-activate audiences in ZoomInfo Marketing for immediate campaign launch or further segmentation.

Use Case Tags: Data Management, Account Prioritization, Audience Development, Ad Campaign Execution & ABM

Primary Personas: Revenue Operations, Marketing Operations Specialists, Demand Generation Managers



Target the Same Accounts Sales is Actually Working On

Build ZoomInfo Marketing audiences using the exact target accounts your sales team has in Copilot. This ensures your ads reach prospects that sales is calling, while your sales conversations benefit from marketing touchpoints prospects are seeing. The filter pulls all unique target accounts across your sales users, updating every 24 hours as sales teams modify their lists.

Access: Marketing > Audience Builder > Sales Target Accounts filter

Use Case Tags: Audience Development, Account Prioritization

Primary Personas: ABM Managers, Demand Generation Managers

Track Which Target Accounts Actually Engage with Campaigns

See which specific accounts from your target list are engaging with campaigns in Salesforce. Enhanced Prioritize Package now shows account-level campaign engagement - see which target accounts clicked your ads, viewed your content, or engaged with specific campaigns. Create reports filtering for "Campaign = Product Launch Q1" and "Engagement Score > 75" to give sales a daily list of hot accounts that need immediate follow-up based on actual marketing interaction.

Access: Admin Portal > Connected Integrations > Salesforce > Prioritize Package settings

Use Case Tags: Ad Campaign Execution & ABM, Lead Management

Primary Personas: Marketing Operations, Revenue Operations

ZIM Persona Targeting Enhancements

Reach your exact target audience across all their devices, even when browsers block traditional tracking. ZoomInfo now uses advanced identity matching that works when browsers block tracking, ensuring your ads reach specific job titles and decision-makers you're targeting. When you build audiences with contact filters like "VP of Sales" or "IT Director," the system matches those contacts to identifiers that work regardless of browser settings, increasing your reachable audience size and improving match rates.

This enhancement works automatically - no setup required.

Use Case Tags: Ad Campaign Execution & ABM

Primary Personas: ABM Managers, Digital Marketing Managers

Granular Account Scoring Insights to Improve Targeting

See exact match statistics showing how many of your uploaded records matched ZoomInfo's database, download your original upload files for verification, and identify specific domains that couldn't be matched. If your match rate is 68%, you can see which company domains need fixing (missing "www" prefixes, outdated URLs, or country-specific domains) to improve your model accuracy.

Access: Admin Portal > AFS > Select your model > Download and match rate data

Use Case Tags: Data Management, Account Prioritization

Primary Personas: Marketing Operations, Revenue Operations

Build Campaign Tracking Codes Automatically (UTM Builder)

Build campaign tracking codes automatically when you create ad sets instead of manually creating UTM parameters for every campaign. Toggle on "Add tracking parameters" when setting your destination URL, and the system pre-fills source ("zoominfo") and medium ("display") while letting you add campaign name, keywords, and content descriptions. This creates properly formatted URLs that connect your ads to pipeline attribution in your analytics.

Access: Marketing > Advertising > Ad Sets > Create Ad Set > Add tracking parameters toggle

Use Case Tags: Ad Campaign Execution & ABM

Primary Personas: Digital Marketing Managers, Marketing Operations

May 20, 2025 ZoomInfo Marketing Release

Highlights

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[First-Party Video Support Added to ZoomInfo Marketing Campaigns](#)

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First-Party Video Support Added to ZoomInfo Marketing Campaigns

Enable more engaging account-based marketing with support for first-party video advertisements in your ZoomInfo Marketing campaigns

Capture attention and drive higher engagement with ZoomInfo's new video ad capabilities. Now you can upload MP4 or WebM videos up to 200MB, with support for 16:9 and 4:3 aspect ratios. Create high-quality, 15–30 second videos to tell your brand story, boost brand recall, and increase conversions across your ABM campaigns. With video ads, you can better engage target accounts, improve performance insights, and stay competitive with more dynamic, full-funnel marketing strategies.

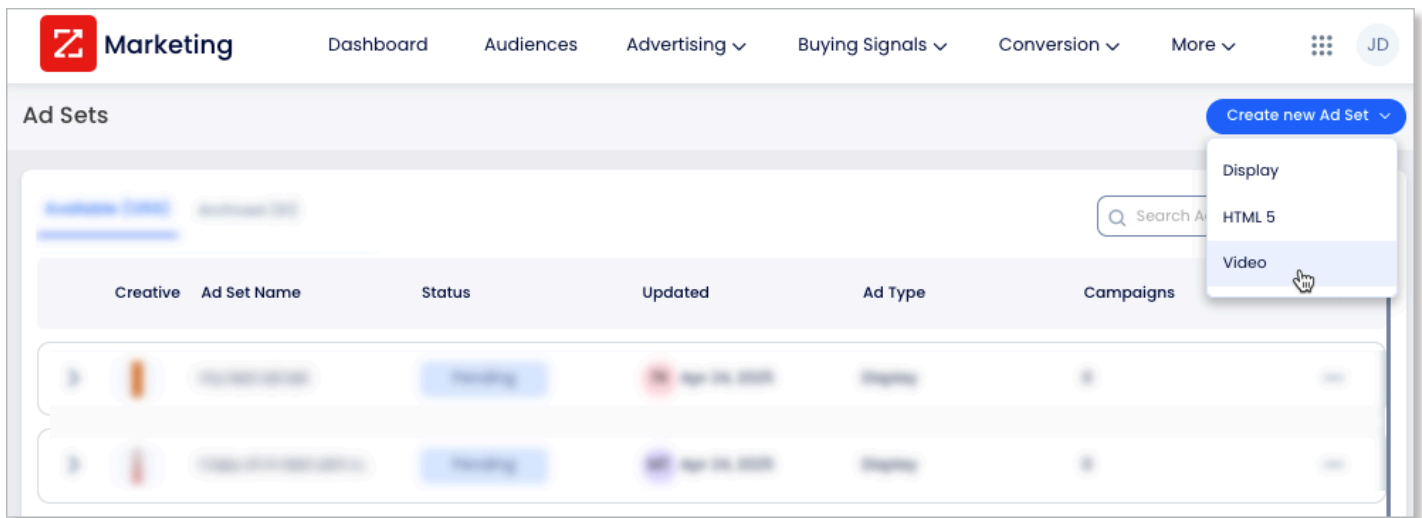
The addition of first-party video advertisements complements our existing display and HTML5 ad formats, offering you more creative flexibility to tell your brand story. This new capability enables you to leverage the proven benefits of video content, including higher engagement rates, improved brand recall, and typically stronger conversion performance compared to static displays.

Supported Video Specifications

File Formats	MP4, WebM, MOV, MPG, MPEG
Maximum File Size	200MB
Aspect Ratios	16:9 and 4:3
Recommended Dimensions	16:9: 1920x1080 (minimum 640x360) 4:3: 640x480 (minimum 480x360)
Recommended Duration	15-30 seconds
Video Quality	1080p recommended

How It Works

1. Navigate to **Advertising > Ad Sets**.
2. Click **Create new Ad Set** and select **Video**.



3. Enter your ad set details including name, destination URL, and any internal notes.
4. In the **Creative Upload** step, select the first-party video file from your local system. The system will automatically validate your video's specifications and dimensions.
5. Preview your video ad by hovering over the thumbnail in the ad set listing page.

Note: Video ads must be approved before campaigns can begin spending. Campaigns with pending or rejected video ads will display appropriate warning messages regarding delivery status.

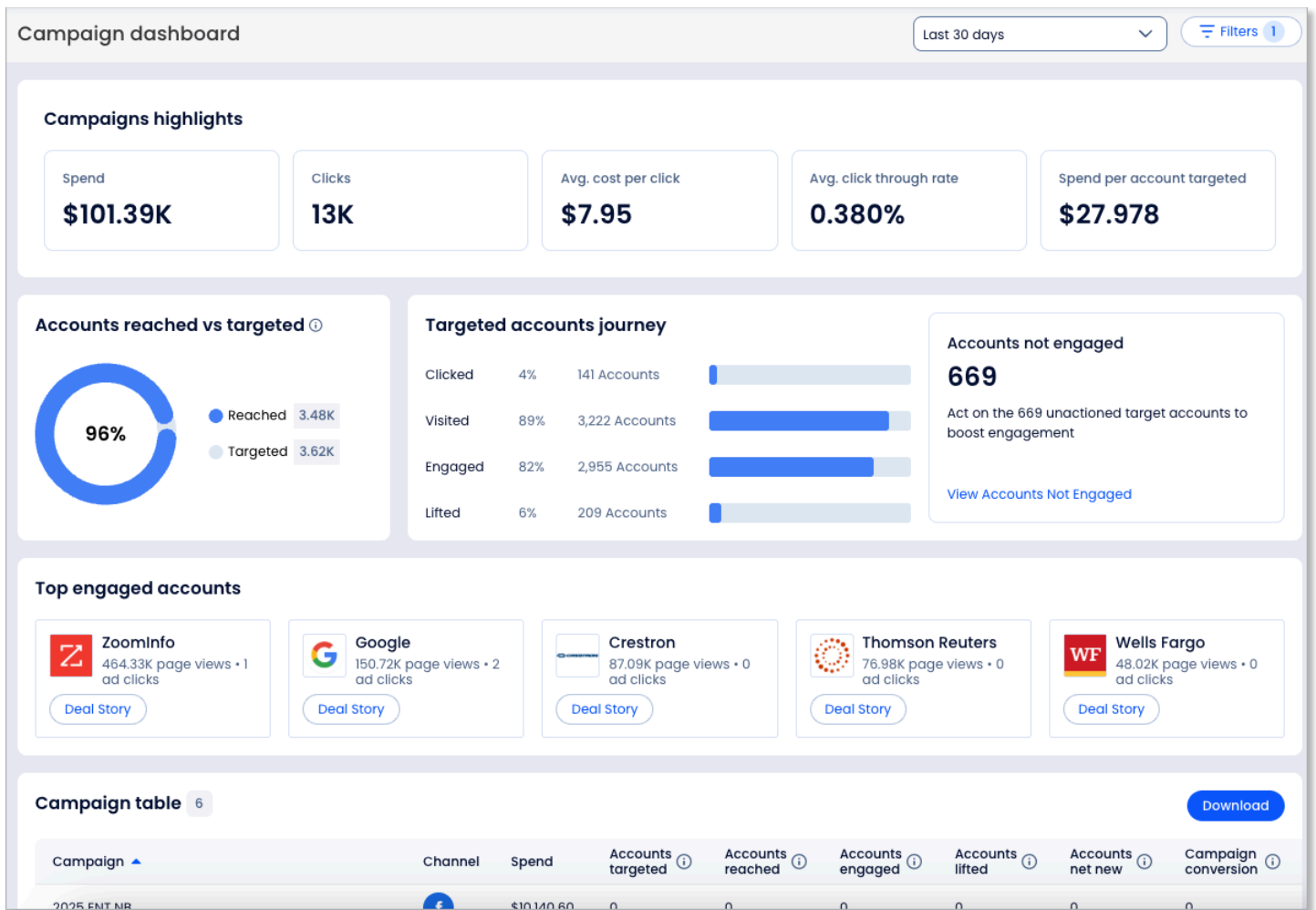
Get Smarter, Faster Insights with the Revamped Campaign Dashboard

Get comprehensive, actionable insights into your advertising campaign performance with improved analytics and engagement tracking

The ZoomInfo Marketing Campaign Dashboard is improved, giving you an actionable, centralized view of your ABM advertising performance. Track engagement across your target accounts, and identify where to optimize — all in one place. With insights on spend, clicks, lift, and account engagement, you can make data-driven decisions, refine your targeting, and drive more pipeline, faster.

The revamped dashboard addresses key challenges marketing teams face when measuring campaign success by delivering clear visibility into both high-level performance metrics and detailed account engagement data.

Marketing managers can now easily track budget pacing, monitor landing page visits, and measure how campaigns contribute to opportunity creation, all from a single, intuitive interface.



Key Improvements

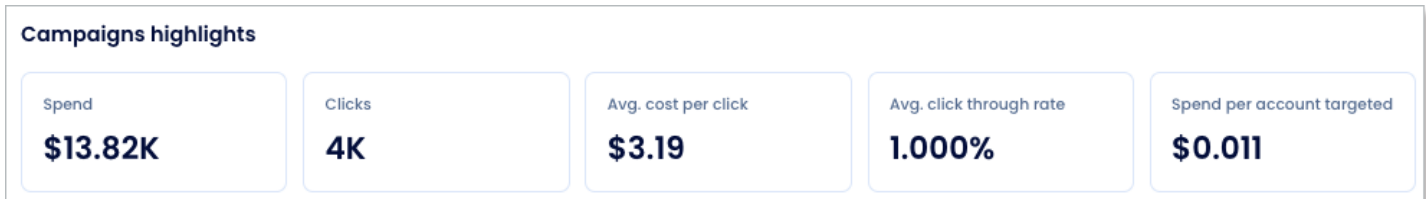
The updated dashboard provides a high-level view of campaign impact, allowing you to:

- Filter and explore campaign data with ease
- Track account engagement across key campaigns
- Prioritize top accounts for sales follow-up
- Quickly edit campaigns or generate reports
- Take informed actions based on performance insights

How It Works

1. Navigate to **Advertising > Campaign Dashboard**.
2. Choose a date range and filter by Campaign, Created By, and Channel.
3. View high-level campaign performance metrics in the **Campaign highlights** section.

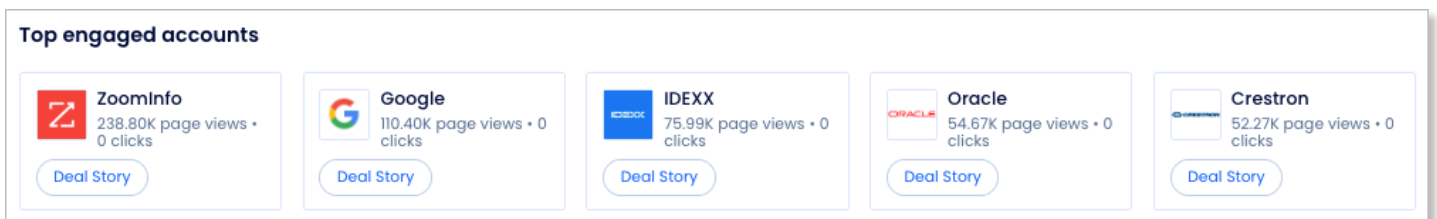
Last 30 days  Filters



4. Track account engagement levels across different stages (reach, clicks, visits, engaged, lifted).



5. View your **Top engaged accounts** and click into the Deal Story to dig deeper.



6. View the list of campaigns that meet your date and filter criteria in the Campaign table.

Campaign table52

Download

Campaign ▲	Channel	Spend	Accounts targeted ⓘ	Accounts reached ⓘ	Accounts engaged ⓘ	Accounts lifted ⓘ	Accounts net new ⓘ	Campaign conversion
Test		\$0.00	1.4K	0	1	4	1	0
Test		\$0.00	4	0	0	0	0	0
Add new campaign: create with new flow ad set		\$0.00	1.1K	0	89	207	207	0
Advanced flow campaign: test		\$0.00	0	0	0	0	0	0
Facebook		\$0.00	1.2K	0	0	0	1	0

Enhanced Conversion Tracking Data in Zoominfo Marketing Reports, Lists and Messages

Use conversion data to help track campaign performance

Marketers can track campaign success using the following enhancements:

- Added a **Conversions** column to the **Campaign Performance**, **Campaign Spend**, and **Campaign Comparison** reports.

Reports > New Campaign Performance Report

Actions Save & Close

Report Properties

Campaign

Summer Outreach Campaign

Date Range

Last 30 Days

Time Granularity

Cumulative

Summer Outreach Campaign

Campaign Summary Accounts Publishers Creatives

Account Name	Spend	Site visits	% Change	Impressions	Clicks	CTR	Conversions	CPC
Walmart	\$100.00	26	+180%	1,305,645	542	0.04%	10,345	\$5.42
Target	\$150.00	53	-18%	1,684,321	653	0.04%	8,765	\$4.35
K Mart	\$300.00	12	+50%	1,950,624	1564	0.08%	5,456	\$5.21
Kohl's	\$250.00	15	+82%	2,684,384	2543	0.09%	6,543	\$10.17
Ocean State Job Lot	\$250.00	8	+90%	2,365,446	1354	0.06%	1,234	\$5.42
Big Lots	\$100.00	4	+68%	804,354	532	0.07%	4,321	\$5.32

- Added a **Conversions** section to the **Campaigns** page

Campaigns

Create New Campaign

Active 2,026 Archive 2,026 Drafts 2,026

Filters Search Audiences

Campaigns	Created by	Channel	Accounts	Start	End	Spend	Impressions	CTR	IA	Actions
> Campaigns A	DL 02/09/21	f	4,370	1/18/2023	2/28/2023	\$25,624.34	1,200	1.56%	40	...
✓ Campaigns	DL 02/09/21	Z	4,370	1/18/2023	2/28/2023	\$25,624	500	1.56%	40	...

Campaign Performance Accounts Leads

Performance	Budget	Audience
Impressions 21.5K	Total Budget \$75K	Audience ABCXYZ
Click Through Rate 1.2%	Ad Spend \$55.8K	
Cost per Click \$0.97	Total Budget Remaining \$19.2K	
Marketing Influenced Accounts 785		
	CPM	
	eCPM \$5.91	
	Min-Max \$2.00-\$10.00	

Schedule

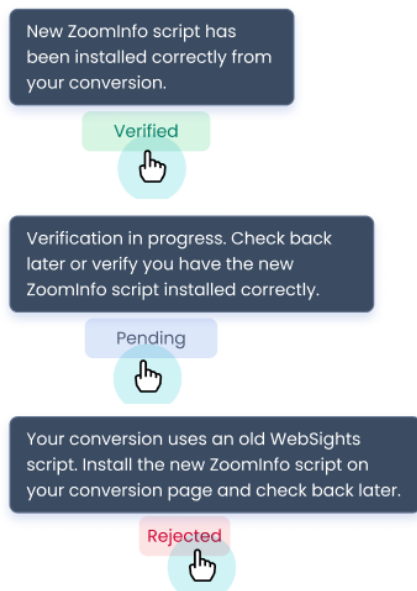
Schedule Dec 26, 2021 - Jan 21, 2022

Time Remaining 9 days

Conversions

Conversion A	Page Load (47)
Conversion B	Page Load (15)
Conversion C	Page Load(9)

- Added accurate and actionable rejection reasons in popup messages related to conversions.



Credit Card Limit Increased in Ad Store

We've increased the credit card transaction limit in the ZoomInfo Ad Store from \$25,000 to \$100,000. This update enables larger media purchases without the need for alternative payment methods, delivering a smoother, more efficient experience for high-spending customers managing scaled campaigns.

Streamlined Navigation Experience in the Admin Portal

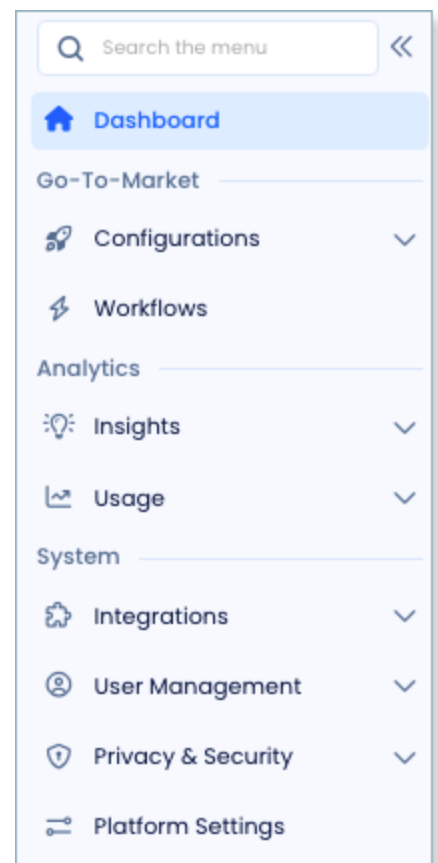
Benefit from a more intuitive and efficient way to manage your ZoomInfo settings with a redesigned navigation structure and new search capabilities

We've reimagined the ZoomInfo Admin Portal navigation to create a more intuitive and efficient experience for administrators. The new design organizes features into logical categories that align with how you think about and use ZoomInfo, making it easier to find and manage settings that matter most to your organization.

These improvements help reduce the time spent searching for settings, accelerate onboarding for new administrators, and increase overall efficiency in managing your ZoomInfo implementation.

How It Works

1. Access the **Admin Portal** as you normally would.
2. Navigate through the redesigned menu structure.
3. Use the new "Search the menu" option at the top of the navigation to quickly find specific settings or features.



4. Find consolidated features in logical locations - for example, all AI-related features under **Configurations > Intelligence** and role-based access controls under **User Management > Users > Roles**.

Note: The navigation options an admin sees will reflect your organization's specific ZoomInfo product entitlements and role-based access.

Navigation Categories and Contents

Category	Purpose	Key Features and Functions
 Dashboard	Admin Portal home page providing quick access to administrative functions	Returns user to the Admin Portal home page
 Configurations	Go-to-market settings and core platform capabilities that define how your teams leverage ZoomInfo data	• Targeting rules and preferences • Intent signal configuration • Product and service offerings management • AI and Intelligence settings • Domain management • GTM alert configuration
 Workflows	Workflow automation and process management tools to streamline operations	• Automated workflow creation and management • Sales and marketing playbooks • Trigger configuration • Automation rules and conditions
 Insights	Analytics and reporting tools to measure platform effectiveness	• Copilot engagement • Copilot potential
 Usage	Comprehensive view of how your organization utilizes ZoomInfo's features and licenses	• License management and allocation • Usage tracking across features • Enrich activity monitoring • Advertising spend analysis • Talent solution usage metrics

Category	Purpose	Key Features and Functions
 Integrations	Connection points between ZoomInfo and your tech stack	• Third-party platform connections • Custom data connector setup • CRM integration and writeback rules • API configuration and webhook management • Enrich settings • GTM object mapping
 User Management	Controls for managing access, permissions, and user authentication	• User account administration • Role-based access control • Group management • Automated user provisioning • SSO configuration and management
 Privacy & Security	Settings related to data protection, compliance, and security protocols	• Compliance settings and monitoring • Communication preferences • Data sharing controls • Security policy management
 Platform Settings	Platform-wide settings	• General settings • Dialer and email • Content enablement

Apr 15, 2025 ZoomInfo Marketing Release

Highlights

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Automated Account Reached and Clicked Signals in Copilot for DSP Campaigns

Get automatic notifications when your target accounts are reached with a ZoomInfo Marketing campaign

We've streamlined the Account Reached and Account Clicked signal functionality to automatically inform sellers when their target accounts are reached with ZoomInfo Marketing display campaigns (DSP). This enhancement creates stronger alignment between marketing and sales efforts by providing real-time visibility into account engagement.

Availability

This feature is available to organizations with ZoomInfo Copilot (Advanced or Enterprise) and ZoomInfo Marketing (ABM Lite or Enterprise).

No Config Needed

Previously, marketers had to manually configure campaigns and input specific information to generate these signals. Now, these signals are **automatically generated for all DSP campaigns**, regardless of size, making it easier for marketing teams to support sales efforts at scale.

When target accounts are exposed to Marketing display campaigns, **sellers receive immediate notifications through ZoomInfo Copilot**, enabling them to time their outreach more effectively based on marketing touchpoints.

The screenshot displays the ZoomInfo Copilot interface. The top navigation bar includes the ZoomInfo logo, a search bar, and links to Home, Lists, Intent, Workflows, and More. A 50% progress indicator and a notification bell are also present. The main content area is divided into two panels. The left panel, titled 'Top updates for today Powered by AI', shows a 'Marketing Alert' for FedEx: 'FedEx is being reached by a ZoomInfo Marketing campaign.' The right panel, titled 'FedEx / Signals / Marketing', provides details about the campaign, including 'Reasons to engage now' and 'Recommended Play: Reach out to campaign audience'.

Top updates for today Powered by AI
Prioritized by signal strength and recency

FedEx
Great fit Customer Target account

FedEx is a global transportation and logistics company that provides a wide range of services including air, ground, freight, and supply chain management.

Now is a good time to reach out.

Last 7 days

- Marketing Alert: FedEx is being reached by a ZoomInfo Marketing campaign.

Show 2 more

Follow up with **Dana Lev**, didn't answer email you sent 2 days ago

Reach out to campaign audience

Introduce yourself to **Andrew Turner**, who joined as Director, Information Technology

Show less

FedEx / Signals / Marketing

Great fit In CRM Target account

Reasons to engage now

Last 7 days

- FedEx is being reached by a ZoomInfo Marketing campaign.

Notes for sellers:
The main message of the "FedEx Buyers" campaign is "Sales growth for a great value". See our sales enablement deck [here](#).

Content for AI emailer:
It's Our Business to Grow Yours. Get the B2B data and software you need to connect with and close your most valuable buyers – all in one operating system

Recommended Play: Reach out to campaign audience

Reach out to campaign audience

For ZoomInfo Marketing Users

Create and run DSP campaigns as normal in ZoomInfo Marketing - no additional configuration is required.

For Copilot Users

1. Monitor target accounts in your Copilot feed for signals.
2. Look for notifications that indicate when your target accounts have been exposed to marketing campaigns:
 - a. **Account Reached:** (e.g., "Marketing Alert: [Account Name] has been reached by a ZoomInfo Marketing campaign").
 - b. **Account Clicked:** (e.g., "Marketing Alert: [Account Name] has clicked on a ZoomInfo Marketing campaign").
3. Use these signals, along with other account intelligence, to inform your outreach strategy.

Reduced Account Limit for Audiences to 1 Million

The maximum audience size has been decreased from 2 million to 1 million accounts

Extremely large audiences can slow performance and disrupt workflows, even if they're not actively used in campaigns. As of **April 1, 2025**, we adjusted the limit for the number of accounts included in an audience—reducing it from a previous limit of 2 million to a new limit of 1 million accounts.

- **New Audiences:** If you reach the new limit when creating a new audience, an Audience Size Limit Reached notification will be displayed and the user can't proceed with creating the audience until it is adjusted to meet the 1 million account threshold.
- **Existing Audiences:** If an existing audience already goes beyond the limit, it won't be impacted unless changes are made to it. If that happens, the audience will need to be adjusted to stay within the limit.

Marketing

Dashboard

Audiences

Advertising

Buying Signals

Conversion

Unified Funnel

Lists

TV

< Audiences / New ZoomInfo Audience

Filters 1 | Clear All

Q Search filters or values

Leads

Persona

Lead Name or Email

Job Title & Role

Lead Info

Contact Tags

Locations

Locations

Salesforce

ZoomInfo Audience Overview

Accounts (3,237,979)

Leads (49,574,288)

Firmographics

Account Name	Industry	Revenue	Employees	Location	AFS	IMS	Website
THMA ...	Management ...	\$1000.00B	1 - 10	Thornhill, Cana...	-	-	Website
McKe...	Drug Stores & ... + 4	\$330.19B	10,000+	Irving, Texas	100	79	Website
Ameri...	Management ...	\$229.67B	10,000+	Conshohocken...	99	73	Website
Amaz...	Custom Softw...	\$102.97B	10,000+	Seattle, Washi...	98	24	Website
Xiam...	Management ... + 3	\$98.57B	10,000+	Xiamen, China	77	-	Website
NTT	Telephony & W... + 4	\$96.90B	10,000+	Chiyoda-ku, J...	99	71	Website
ell T...	Computer Equi... + 2	\$93.95B	10,000+	Round Rock, Te...	99	85	Website

Accounts

Leads

< Back

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Audience Size Limit Reached

Your audience has reached the limit of 2 million accounts. Please use additional filters to narrow your search.

Product Release Notes

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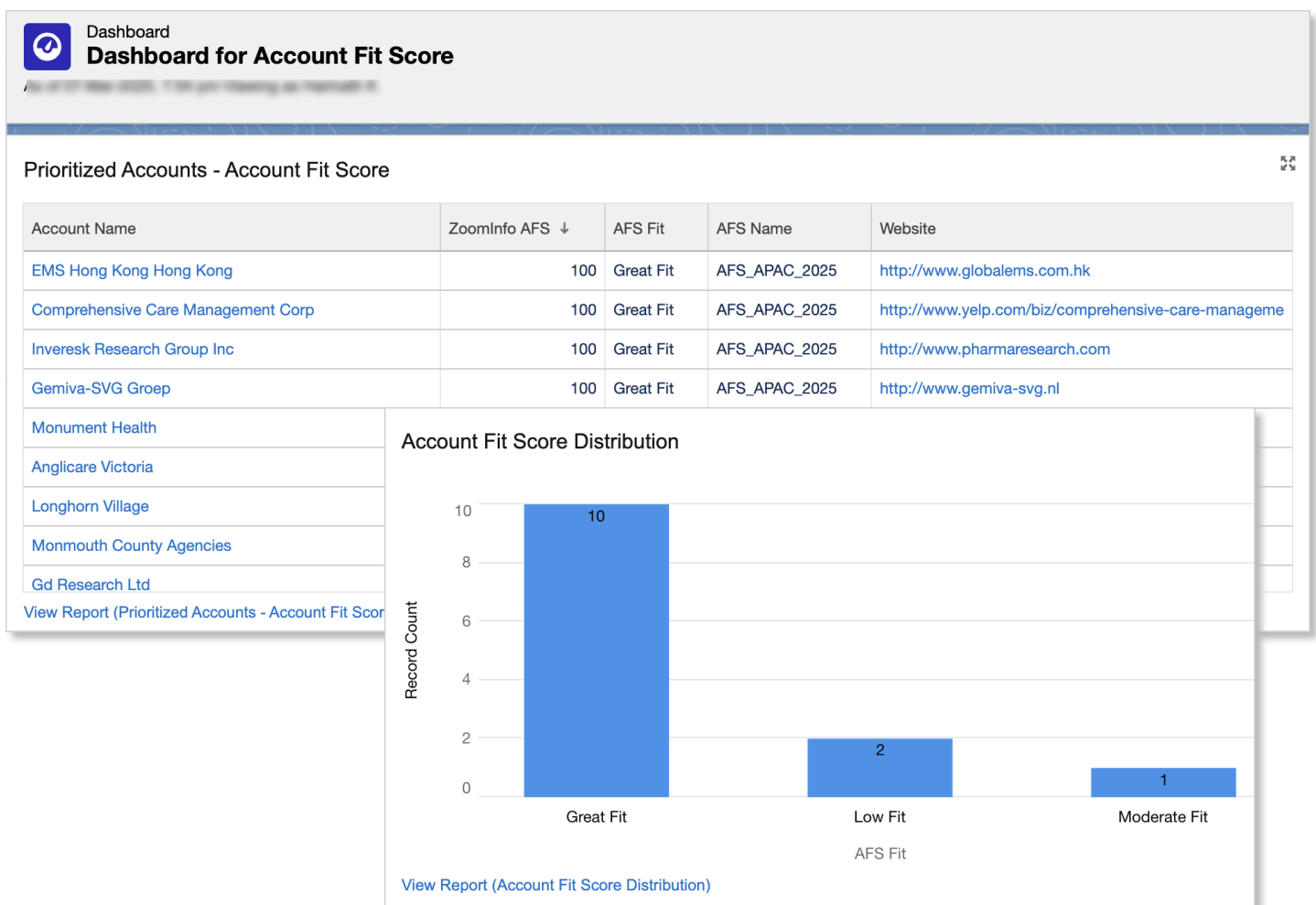
Account Fit Score Data in Prioritize Dashboard for Salesforce

Leverage Account Fit Score data alongside existing metrics to better identify and target best-fit accounts in your Salesforce environment

ZoomInfo Marketing users with Salesforce can now leverage Account Fit Score (AFS) data on the Prioritize Dashboard. AFS data complements existing metrics like In-Market Score (IMS), Funnel Stage tracking, and WebSights data to provide a more comprehensive view of your target accounts.

This enhancement builds on the dashboard's existing capabilities for optimizing campaign performance and improving ROI predictability by adding another layer of intelligence to your account prioritization process.

- AFS helps you understand how well a prospect aligns with your ideal customer profile by providing detailed fit metrics including an overall score value, fit category, and a unique identifier.
- When combined with other Prioritize Dashboard metrics, AFS enables marketing and sales teams to make more informed decisions about account targeting and engagement strategies.



Who Gets It

Account Fit Score data is available for customers with ZoomInfo Marketing who have set up the Prioritize Package integration with Salesforce CRM.

Admin Setup

Admins can ensure Account Fit Score is included in the Prioritize Dashboard by reviewing the [Prioritize Dashboard Implementation Guide for Salesforce](#).

Prioritize Sync preference

Leverage ZoomInfo Marketing data to help identify and prioritize the right accounts at the right time. Synced records will update every 24 hours. See [our implementation guide](#) for more details.

❗ All the datapoints are available in Salesforce [Create Dashboard](#)

☒ Account Fit Score

1000 records were last synced on Mar 05, 2025 at 12:02 PM

✓ All the fields are configured and ready to sync

These object fields are required to sync the object type to Salesforce

- | | |
|------------------------------|---------------------------|
| ✓ Account Fit Score Category | ✓ Account Fit Score Name |
| ✓ Account Fit Score UID | ✓ Account Fit Score Value |
| ✓ Account Id | |

How It Works (for Users)

1. Access your Prioritize Dashboard in Salesforce to view the new **Account Fit Score** section.
2. Review key Account Fit Score metrics including:
 - Score Value (0-100)
 - Fit Category (e.g., "Great Fit")
 - Score Name (e.g., "AFS_APAC_2025")
3. Use **Account Fit Score** in combination with other metrics like **In-Market Score** and **Funnel Stage** to identify and prioritize your best-fit, high-intent accounts.

HubSpot Support for Account Fit Score in ZoomInfo Marketing

Transform your account targeting strategy with precision and intelligence by leveraging HubSpot data to drive your Account Fit Score (AFS) in ZoomInfo Marketing.

ZoomInfo Marketing now supports using your HubSpot integration to determine your Account Fit Score (AFS), helping to transform your account targeting strategy with precision and intelligence.

By focusing on accounts that are the best fit for your business, AFS empowers you to prioritize efforts, streamline your sales cycle, and significantly boost conversion rates. It's about aligning your sales and marketing strategies with data-driven precision.

AFS Features

- Easy-to-use configuration process utilizing direct integration with HubSpot
- Predictive AI scoring model to identify target accounts based on their fit to your ideal customer profile
- Scoring that ranges from 0-100, categorizing accounts as a Low, Moderate, or Great fit
- Key attributes found within your customer base that contribute to your score
- A filter in Marketing to effortlessly narrow down your high-potential accounts

Getting Started

Here are the basics on getting started with Account Fit Score using HubSpot CRM data. First, ensure the following prerequisites are met:

1. Ensure your organization is connected with HubSpot in the Admin Portal.
 - To establish a new connection, go to **Integrations** and select **HubSpot** to connect.
2. Verify the **Advanced Sync** toggle is turned on in your **Import** settings.
 - Navigate to **Integrations > Connected > HubSpot > Edit settings > Import**.
 - If enabling **Advanced Sync** for the first time, use the **Schedule Import** feature to expedite data sync processing.
 - Allow at least 24 hours of processing before configuring AFS using HubSpot filters.

Once processing is complete, perform these configuration steps:

1. From the **Settings Menu** in the **Admin Portal**, go to **Set Up > Account Fit Score**.
2. Click **+ Configure AFS**.
3. Choose **HubSpot** as the data source.
4. Build your list by applying either **Company Object** or **Deal Object** filters.

- By default, we automatically apply a condition (Lifecycle Stage = Customer)
- You can add up to 10 filters for each object type customized to your needs

5. Once filters are in place, click **Save Configuration**.



Learn more Check out the following content to get started with AFS:

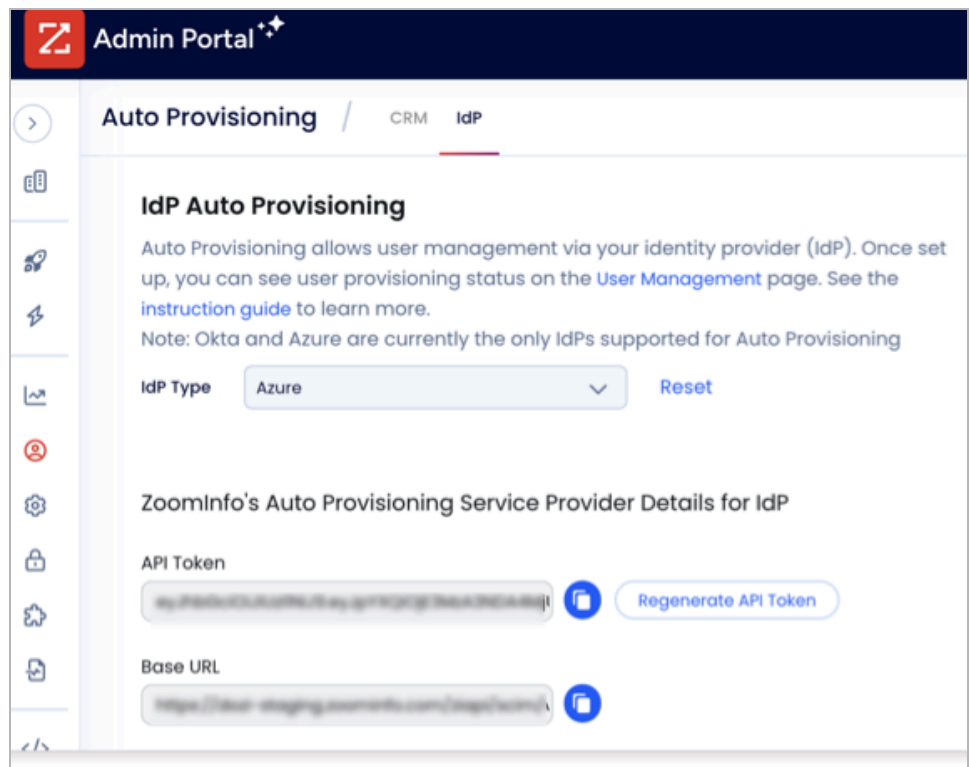
- [Account Fit Score Explained](#)
- [How to Configure Account Fit Score](#)
- [Account Fit Score \(AFS\) FAQ](#)

Enhanced Microsoft Entra ID SCIM Token Management with Custom Expiration Settings

Set expiration dates for Microsoft Entra ID SCIM API tokens and receive timely renewal reminders

For organizations that set up SCIM auto provisioning for ZoomInfo products using Microsoft Entra ID ([formerly Azure](#)), our auto provisioning configuration requires that the API token used to authenticate the connection be periodically refreshed.

- Choose a token expiration option (90 days, 180 days, or 1 year).
- All ZoomInfo admins for your org will receive notifications (email and in-app) starting approximately 1 month before expiration.
- An admin can choose to refresh the token proactively at any time.
- Token expiration will not impact existing provisioned users. However, new subscription groups cannot be created, and provisioning activities cannot occur until refreshed.



Learn more [Auto Provisioning with ZoomInfo and Microsoft Entra ID Integration Guide](#)

New Industry Filter Added to WebSights for Enhanced Visitor Analysis

Focus on high-value website visitors from target industries to drive smarter outreach and better pipeline.

WebSights has introduced a new **Industry** filter that enables you to segment your website visitors based on their industry classification. This enhancement gives you greater control and visibility into which industries are engaging with your website content, helping you make more informed decisions about your sales and marketing strategies.

With the Industry filter, you can now instantly identify and focus on companies from your target industries, eliminating the need for manual sorting or external analysis. This capability is particularly valuable for organizations looking to streamline their prospecting process and ensure their sales and marketing teams are focusing on the most relevant opportunities.

The screenshot displays the WebSights Analytics dashboard. On the left, the 'Select Filters' sidebar includes options for 'Past 24 Hours', 'Domain Name' (zoominfo.com), 'Company Name' (input field), 'Page Rank' (dropdown), and 'Industry'. The 'Industry' filter is expanded, showing 'Agriculture' with sub-options: 'Animals & Livestock' (checked), 'Crops', and 'Forestry'. Below these are 'Business Services' and 'Construction'. The main panel shows 'Filters: Industry: Animals & Livestock' with a 'Clear' button. It reports '14,711 Results found' and includes '0 Selected', 'Open in Search', 'Export', and 'Tag Cor' buttons. A table lists visitor data with columns 'Last Visit' and 'Company Name'. The table contains 12 rows, with the 8th row, 'Malloy Electric', highlighted. All 'Last Visit' dates are 'Mar 7, 2025 8:31 PM'.

Last Visit	Company Name
Mar 7, 2025 8:31 PM	Kahua
Mar 7, 2025 8:31 PM	Nanolumens
Mar 7, 2025 8:31 PM	Burt Process Equipment
Mar 7, 2025 8:31 PM	Sonoco
Mar 7, 2025 8:31 PM	Callaway & Price
Mar 7, 2025 8:31 PM	Merchants Bank of Indiana
Mar 7, 2025 8:31 PM	Malloy Electric
Mar 7, 2025 8:31 PM	Equitable
Mar 7, 2025 8:31 PM	Smartsheet
Mar 7, 2025 8:31 PM	University of California, Irvi...
Mar 7, 2025 8:31 PM	Aspen TechnologyAspenT...

The addition of industry-based filtering helps solve several key challenges:

- Quickly identify high-value domains from specific target industries
- Gain instant visibility into industry-specific engagement trends
- Streamline prospecting workflows by filtering out non-relevant sectors
- Enable more targeted and efficient outreach efforts

How It Works

1. Navigate to the **WebSights > Analytics** tab in ZoomInfo Sales or access it through the **Buying Signals** dropdown in ZoomInfo Marketing.
2. Locate the new **Industry** filter among the existing filters.
3. Select one or multiple industries to filter your website visitors.
4. Review the filtered results to identify companies from your target industries.

Use the filtered view to analyze industry-specific engagement patterns, export selected companies, add tags, or open them in Search for further investigation.

Feb 19, 2025 ZoomInfo Marketing Release

Highlights

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Unified Search Experience Across ZoomInfo Marketing and Sales

Access a consistent, intuitive search interface whether building audiences in Marketing or searching in Sales

We've streamlined our search experience to create a unified interface across ZoomInfo Marketing and Sales platforms. This enhancement brings the robust, user-friendly Advanced Search interface from ZoomInfo Sales into the Marketing platform's audience building functionality, creating a seamless experience for customers who use both products.

The improved interface features an intuitive chip-based filtering system that makes it easier to build targeted audiences and conduct advanced searches across both platforms. This unified approach not only simplifies the user experience but also provides access to expanded targeting options and delivers faster, more reliable search results.

These improvements are built on a consolidated framework that allows ZoomInfo to efficiently deploy updates and maintain consistent functionality across our platform. This streamlined architecture ensures a more robust and scalable search experience for all users.

Marketing

DashboardAudiencesAdvertisingBuying SignalsConversionUnified FunnelMore

Audiences / New ZoomInfo Audience

Filters 4 | Clear All

Search filters or values

Accounts

Account Name

Industry

Energy, Utilities & Waste

Employee Count

20 or Above

Account Revenue

\$50M or Above

Company Tags

Apply Filters

Show All Filters

ZoomInfo Audience Overview

Accounts (5,376)

Firmographics

Account Name	Industry	Revenue	Employees	Location	AFS
State G...	Electricity, Oil & ...	\$545.95B	10,000+	Jinrongjie, China	-
Saudi ...	Electricity, Oil & ...	\$494.74B	10,000+	Dhahran, Saudi ...	-
CNPC	Oil & Gas Explor...	\$483.02B	10,000+	Beijing, China	-
Sinope...	Oil & Gas Explor... +4	\$468.19B	10,000+	Chaoyang, China	-
Sinopec	Oil & Gas Explor... +4	\$438.98B	10,000+	Chaoyang Distri...	-
PetroC...	Oil & Gas Explor...	\$432.89B	10,000+	Dongcheng Dist...	-

Cancel

Accounts

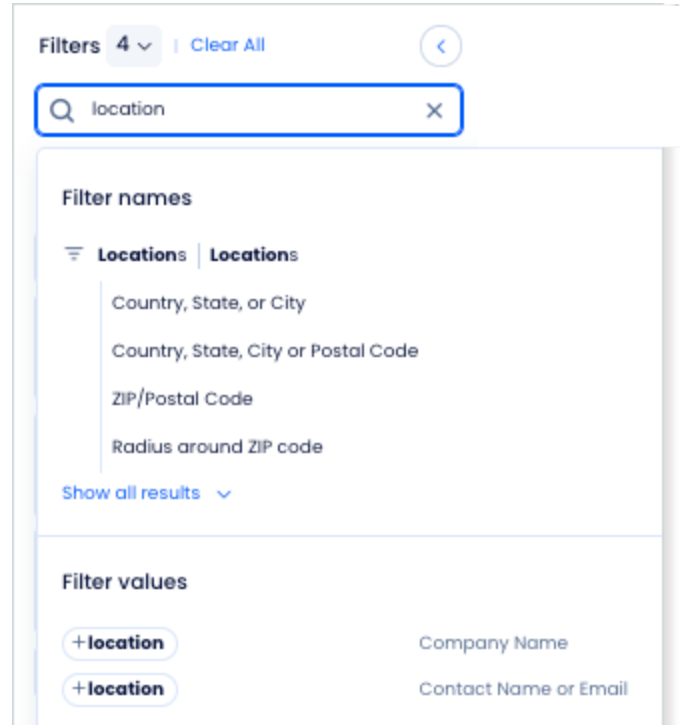
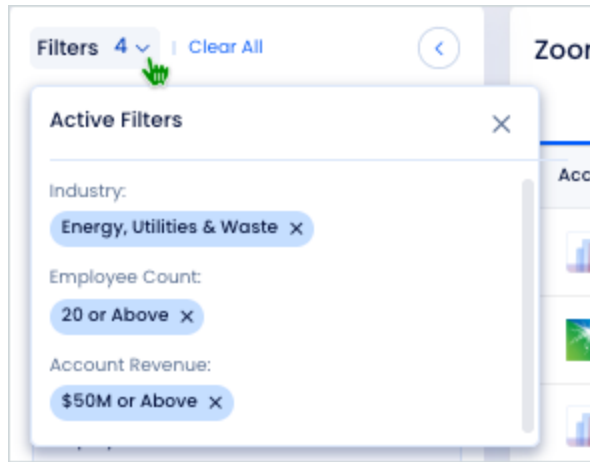
Leads

Back

Next

Using Filters

1. Select your criteria and click **Apply Filters** to instantly update your results to reflect it.
2. Click the **Filters** dropdown to view and manage currently applied filters.

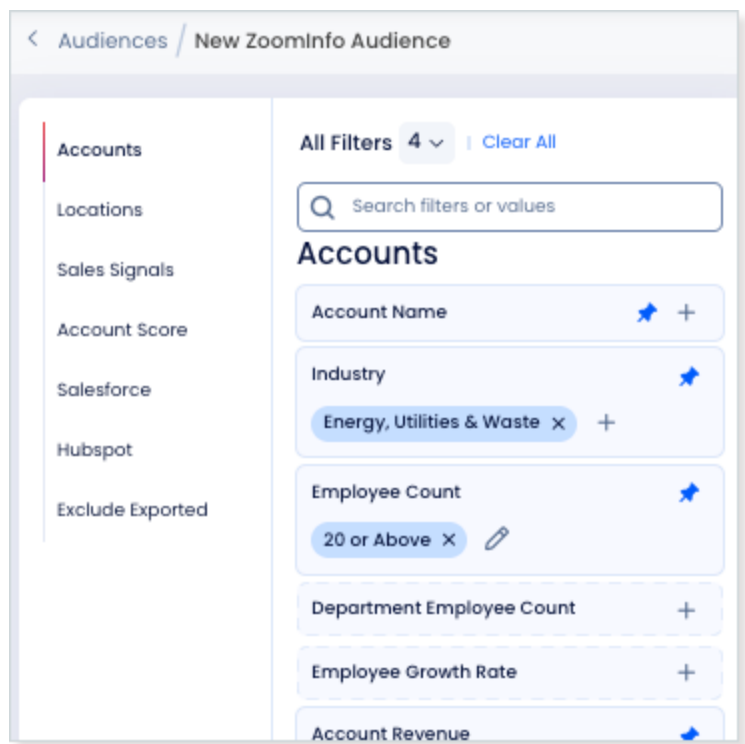


3. Can't find a filter or value you're looking for? Use the search functionality to quickly locate specific filters or values.

Customizing Your Default Filter View

Your default filter view doesn't reflect all of the possible filters we have available.

1. To see the full categorized list of filters and manage your default view, scroll to the bottom of the filters pane and click **Show All Filters**.
2. Hover over any filter to pin it to your default view, or unpin filters you don't frequently use.
3. Once you've set up the perfect default set of filters you want, click **Save** to return to the default view.



Workflows Branching: Design Complex, Conditional Paths with Visual Builder

Create sophisticated, multi-path Workflows that automatically route leads and tasks based on custom conditions

Introducing **Workflows Branching**, a powerful new capability that transforms how enterprise teams design and manage their automated processes in ZoomInfo. This feature enables users to create multiple conditional paths within a single Workflow, eliminating the need to maintain numerous separate Workflows for different scenarios.



With Workflows branching, you can:

- Create complex automation scenarios that previously required multiple separate Workflows, significantly reducing manual effort and improving operational efficiency.
- Design dynamic, condition-based paths that automatically route leads, assign tasks, and trigger actions based on contact and company field values.

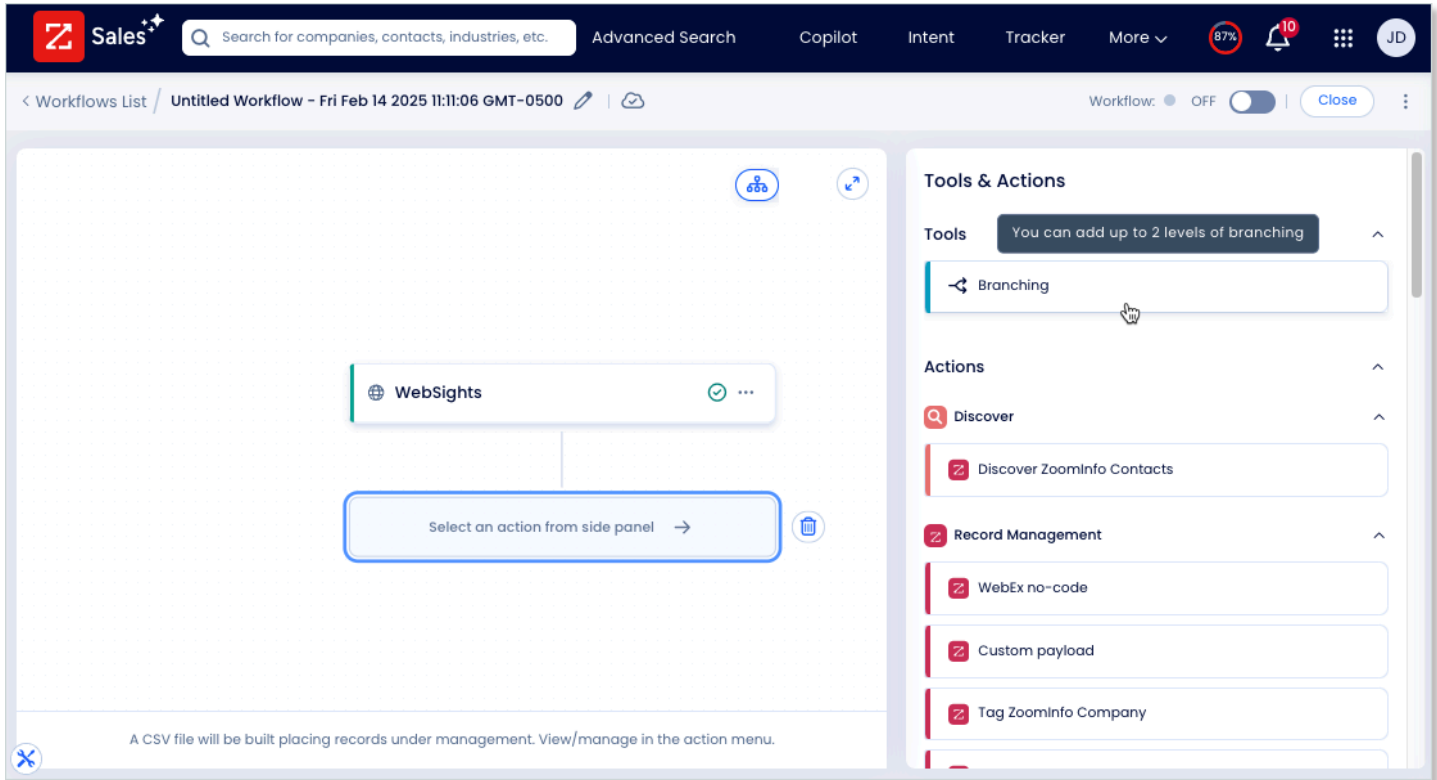
Visual Builder

To support Branching and provide a consistent Workflows experience, we've removed the natural language option for building Workflows. Existing Workflows will be migrated and reflected in the Visual Builder interface.

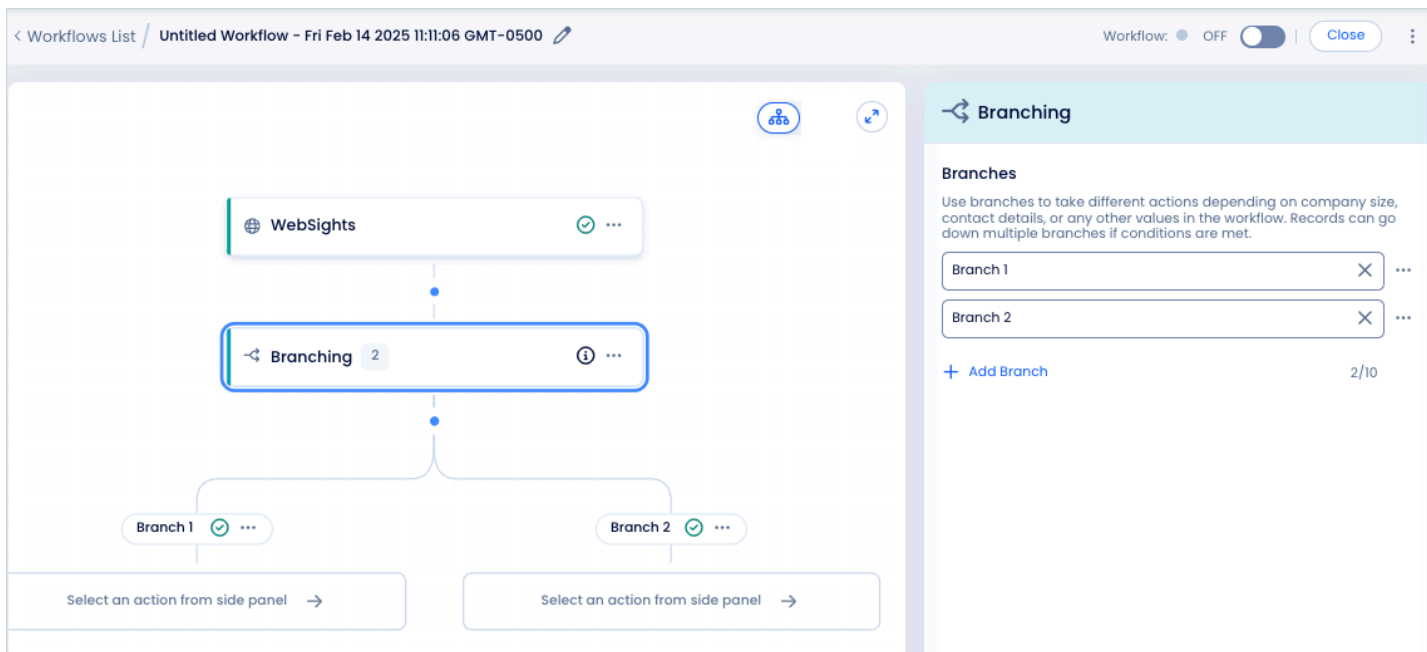
How It Works

When creating a Workflow:

1. Select a trigger for your Workflow.
2. Under **Tools & Actions**, click **Branching**.



3. Use the intuitive Visual Builder interface to begin building out your Workflow's branching logic. You can add up to 10 branches for each action.



4. You can rename branches for easy, contextual identification.

5. Each branch can have a set of conditions based on the action

Field	Operator	Value
Company ...	Contains	California

Who Gets It

Available for ZoomInfo Sales organizations with the Sales Advanced+ or Elite+ package.



Learn more

For full details on building Workflows using the Visual Builder, including the Branching option, see [How to Use Workflows Branching in ZoomInfo Workflows](#)

Enhanced Marketing Dashboard with Audience Filtering

Filter dashboard data by multiple audiences and selected date range

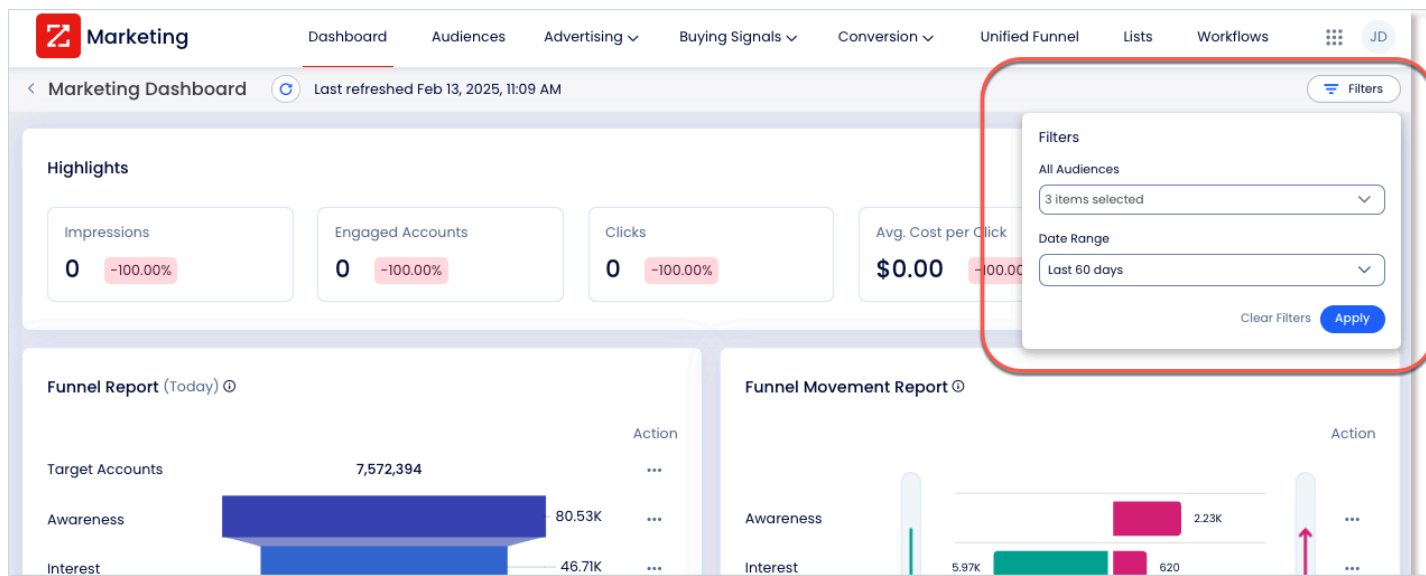
We've upgraded the Marketing Dashboard homepage to provide more actionable insights and greater visibility into your marketing performance. The new audience filtering capability allows you to analyze data across multiple audiences simultaneously. This improvement makes it easier to track and compare performance across different audience segments.

Key enhancements include:

- New audience filter with multi-select capability
- Unified time range selector for all dashboard widgets
- Streamlined widget interface with consistent filtering

How It Works

1. Select one or more audiences from the new dropdown menu at the top of the dashboard to filter your view.



2. Choose your desired time range using the date selector to update all widgets simultaneously. The new unified filtering system replaces individual widget time filters, creating a more consistent and streamlined experience across your entire dashboard.

Generate Your Account Fit Score from Microsoft Dynamics

Leverage Microsoft Dynamics data to identify ideal customer profiles and fuel Account Fit Score.

Copilot's **Account Fit Score (AFS)** uses predictive AI modeling to assess the compatibility of potential accounts with your ideal customer profile. AFS guides sellers to focus on accounts with the highest propensity to buy, ensuring they work from a prioritized list of target accounts for increased conversion and closed-won deals.

What's New?

- You can now generate your AFS score from Microsoft Dynamics.
- AFS scores will refresh automatically every 90 days, saving time and eliminating manual efforts.
- You can easily switch between **Dynamics**, **Salesforce**, **HubSpot**, or **CSV** as your data source, giving you more control and flexibility

 **ZoomInfo** Dismiss

 Ask Copilot

 Great Account Fit  Company in Hubspot  Target Account

ZoomInfo is a comprehensive business intelligence platform that provides data and insights on over 200 million people and 11 million companies worldwide. The company has 3,516 employees and reported \$1.24 billion in revenue.

 **Competitive risk**

Last 7 days

- [Website visits](#): Recent activity has been detected on important pages on your websites and domains.
- [Competitive Alert](#): Actively researched competitor - LiveVox

Last 30 days

- [Partnership](#): ZoomInfo has announced an expanded partnership with Salesloft to enable customers to purchase Salesloft's revenue orchestration platform, allowing for access to a new integration. [Source](#)

Show 1 more ▾

Recommended Play: Engaged contact at Prospect departs Why?
 Find other engaged contacts at ZoomInfo See Engaged Contacts

Show 1 more step in play ▾



Learn more

- For admins, connect the [Microsoft Dynamics integration](#) and confirm that Advanced Sync is enabled. Then, see [How to Configure Account Fit Score in the Admin Portal](#)
- For users, see [Account Fit Score \(AFS\) Explained](#) for how the AFS scoring system works, where you'll see indicators in the UI, and how you can leverage it to target the right accounts

Automated Delivery of Custom Marketing Reports to Cloud Storage

Set up automated delivery of custom marketing reports directly to your preferred cloud storage destination

ZoomInfo Marketing customers can now automate the delivery of custom marketing reports to their preferred cloud storage destinations, eliminating the need for manual data requests and enabling faster access to critical marketing insights. This new automated service allows you to receive an unlimited number of custom reports on your preferred schedule - daily, weekly, semi-monthly, or monthly.

Reports can be automatically delivered to Amazon S3, Google Cloud Storage, or Snowflake, ensuring seamless integration with your existing data infrastructure. This automation enables marketing teams to maintain consistent access to up-to-date data, supporting more timely and data-driven decision-making.

Getting Started

Reach out to your ZoomInfo Account Manager or Customer Success Manager to learn more about enabling this functionality.

Weekly Highlights Email

Stay engaged and informed with our new weekly highlights email

ZoomInfo Marketing users will now receive a new weekly highlights email. This curated summary delivers key metrics and insights directly to your inbox, helping you track campaign performance and optimize your marketing strategy.

The email includes:

- Comprehensive performance metrics
- Campaign success highlights
- Optimization opportunities
- Actionable insights for strategy refinement

Our platform helps you save time by providing consolidated performance metrics in one place. You'll be able to identify trends and opportunities quickly, enabling you to make data-driven decisions with confidence. Stay connected to your marketing campaigns while easily tracking progress toward your goals, all from a single dashboard.

zoominfo Aug 5, 2024 SJ

Hi [Name],

Here are your weekly highlights from **Jul 29 to Aug 2**.
The marketing dashboard can help you unlock vital account insights to make more informed and strategic decisions.

23%
Cooling accounts

15%
Untouched targeted sales accounts

85%
Great fit not targeted

[Go to Marketing Dashboard](#)

Advertising Week over Week Overview

Accounts targeted	185	+25%
Accounts reached	45	-13%
Accounts clicked on Ads	1	+2%

Your next steps:

- [Check out your campaign dashboard](#) to explore these insights in detail
- [Explore Unified Funnel](#) to gain deeper insights into your marketing strategy

Questions? Contact us!
If you have any questions, contact customer support at marketingsupport@zoominfo.com

Who Gets It?

All users with an ABM Lite or ABM Enterprise license, including both administrators and users.

What Is the Frequency?

Emails are delivered every Sunday evening, ensuring you start your week with fresh insights.

Can I Opt Out?

Yes, an unsubscribe option is available in every email.

Streamlined Campaign Creation with In-Line Audience Building and Ad Set Upload

Create audiences and upload ad sets directly within the campaign builder to accelerate your marketing campaign setup

We've simplified the campaign creation process by unifying audience building and ad set management directly within the campaign builder interface. This enhancement eliminates the need to switch between different views when setting up your marketing campaigns, creating a more efficient and intuitive workflow.

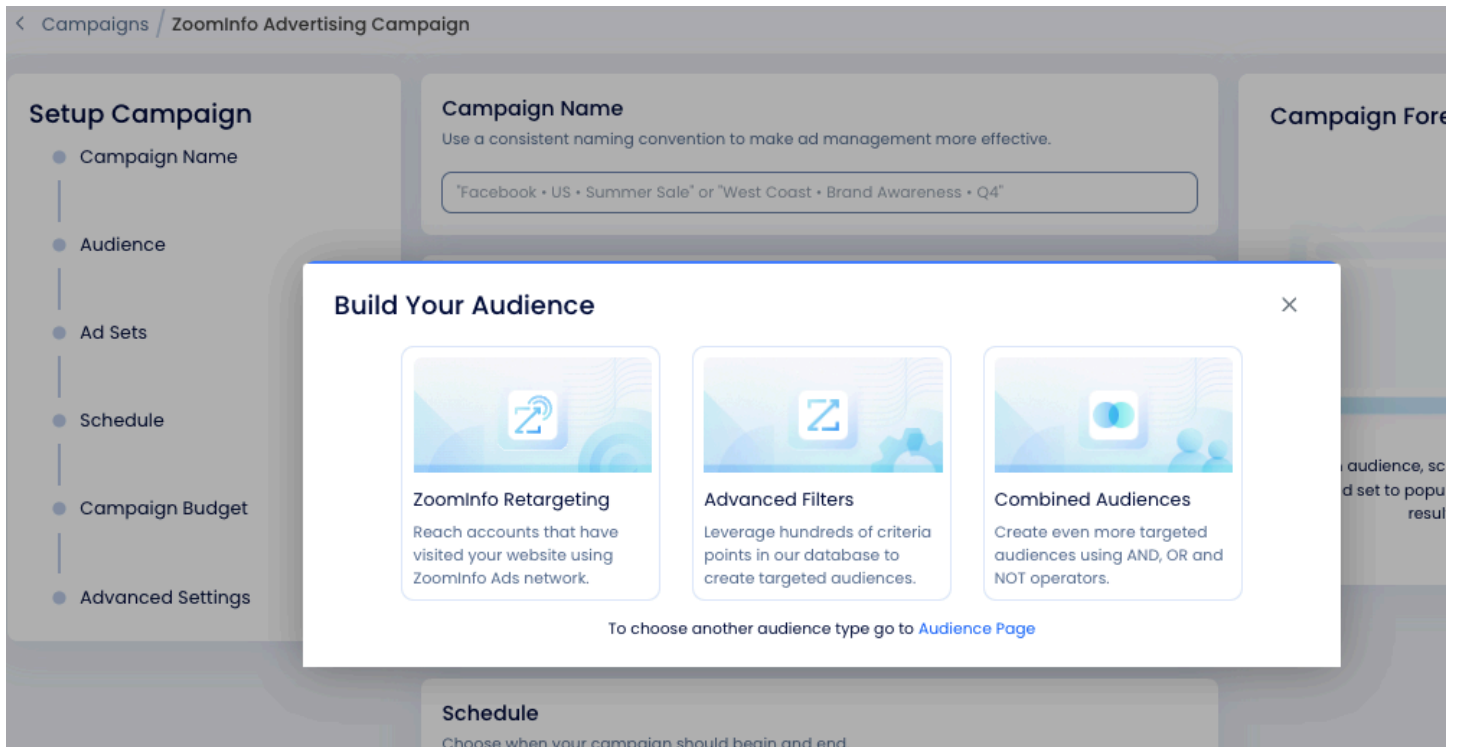
Previously, you needed to create audiences and ad sets before starting your campaign setup. Now, you can seamlessly build audiences and upload ad sets while building your campaign, saving valuable time and reducing complexity in your campaign creation process.

- Streamlined workflow that reduces campaign setup time
- Fewer clicks and screen transitions
- Reduced chance of setup errors
- More time for strategy optimization and results analysis

The screenshot displays the 'Setup Campaign' interface in the ZoomInfo Marketing tool. The top navigation bar includes 'Marketing', 'Dashboard', 'Audiences', 'Advertising', 'Buying Signals', 'Conversion', 'Unified Funnel', and 'More'. The main header shows 'Campaigns / ZoomInfo Advertising Campaign'. On the left, a sidebar lists the setup steps: 'Campaign Name' (checked), 'Audience' (selected), 'Ad Sets', 'Schedule', 'Campaign Budget', and 'Advanced Settings'. The main content area is divided into sections for 'Campaign Name' (with a text input 'Spring 2025'), 'Audience' (with 'Create New Audience' and 'Select Audience' buttons), 'Exclusion list (Optional)' (with 'Create New Exclusion List' and 'Select Exclusion List' buttons), 'Ad Sets' (with 'Create New Ad Set' and 'Select Ad Sets' buttons), and 'Schedule' (with date pickers for 'Feb 11, 2025' and 'End Date'). A 'Campaign Forecast' panel on the right shows a placeholder for a forecast chart and instructions to 'Select an audience, schedule, and at least one ad set to populate the forecast results.'

How It Works

1. Navigate to the campaign builder (**Advertising > Campaigns**).
2. Click **New Campaign** and select the campaign type.
3. As you build the campaign, you can now:
 - Click **Create New Audience** directly within the campaign setup flow to build your target audience.
 - Use the **Upload Ad Set** option within the same interface to add your advertising creative.



Jan 22, 2025 ZoomInfo Marketing Release

Highlights

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[Manage Enterprise API Access in the Admin Portal](#)



New Bulk Tagging Feature Enhances Account Organization and Targeting Capabilities

Create, manage, and apply custom tags to multiple accounts and leads simultaneously for improved audience targeting and sales-marketing alignment

ZoomInfo Marketing's new Bulk Tagging feature transforms how marketing teams organize and target accounts across the platform. This powerful enhancement enables users to efficiently create and manage custom tags that can be applied to multiple accounts and leads at once, streamlining the process of audience organization and segmentation.

The feature bridges a critical gap between sales and marketing teams by providing a unified tagging system that works seamlessly across ZoomInfo Marketing and Sales platforms. By combining custom tags with intent signals, teams can build more sophisticated, dynamic audiences for their marketing campaigns while maintaining consistent account organization across departments.

Key Benefits

- Streamline account management through bulk tagging and consistent cross-platform organization
- Enhance targeting precision by combining tags with intent signals for dynamic audience segmentation
- Improve team alignment and funnel tracking with unified tagging system

How It Works

For admins:

1. From the Admin Portal **Settings Menu**, select **Configurations > System Settings**.
2. Scroll down to the Public Tags section and set appropriate permissions and sharing settings for the tags.



For users:

1. If your admin has granted permission to create public tags, you can create them on the **Lists > Tags** page. All created tags will be public tags by default.
2. You (and any users with permissions to tag and untag) can apply these public tags to accounts and leads.
3. Use these tags as filters when building audiences by combining them with other criteria such as Intent signals.



Learn more [How to Manage Tags in ZoomInfo Marketing](#)

Unified Funnel Dashboard: Account Overlay with Advanced Filtering and Sorting

Gain deeper insights from the Unified Funnel dashboard with new filtering and sorting capabilities in the Account Overlay view

We've significantly enhanced the Account Overlay feature in the Unified Funnel Dashboard to allow you to find specific accounts and refine your focus based on key metrics like date range, spend, impressions, and funnel stages.

These enhancements allow you to quickly search, sort and filter accounts to narrow down target lists and review campaign metrics with ease.

Accounts Insights

Great fit accounts not targeted 1,996
Accounts in the last 30 days

Account Name	Spend	Impressions
Cybera	\$0	0
Morneau Shepell	\$0	0
Syncordis	\$0	0
Eurasia College	\$0	0
FocusVision	\$0	0
Dentsu Aegis Network	\$0	0
Diplomat Pharmacy	\$0	0
WANDisco	\$0	0
Sutler Ventures	\$0	0
Idhasoft	\$0	0
Minor Associates Public...	\$0	0
Sterling National Bank	\$0	0

Filters

Date Range: Last 30 days

Spend: Min - Max

Impressions: Min - Max

Clicks: Min - Max

Unique Visits: Min - Max

Form Submits: Min - Max

AFS: All

Funnel Stage/IMS: All Stages

Open Opportunities: Min - Max

How It Works

1. Navigate to the **Unified Funnel**.
2. Click on any tile within the Unified Funnel to open the enhanced Account Overlay view.
3. Use the new search and filtering options to narrow down accounts based on metrics such as date range, spend, impressions, and funnel stages.
4. Sort any column in the overlay table to organize accounts based on your preferred metrics.
5. Apply time granularity filters to align with your reporting needs.

6. Export filtered and sorted data to CSV for further analysis (no credits charged).

Note: The enhanced Account Overlay maintains all existing functionality, including the ability to view detailed metrics for each account and export capabilities, while adding these new features to improve your analysis capabilities.

Guided Intent for HubSpot

Connect Intent signals to business outcomes that matter with Guided Intent for HubSpot

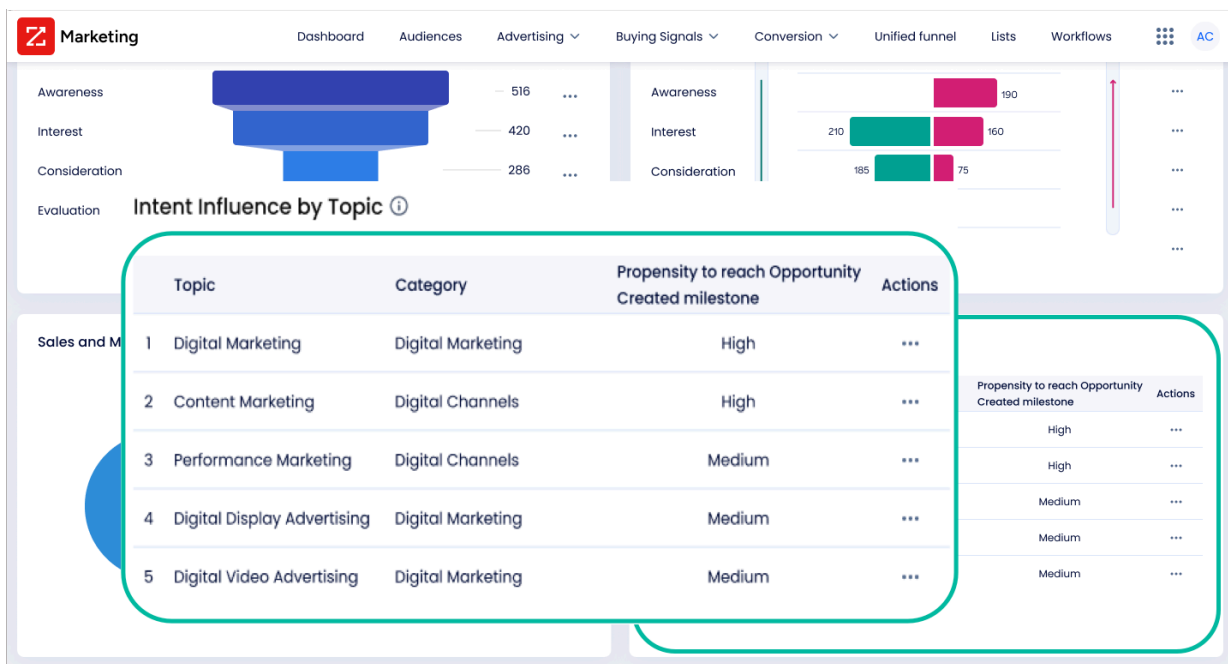
Our Intent offering continues to evolve! In November of 2024 we announced Guided Intent for organizations with Salesforce. Now we offer the same capabilities to HubSpot users.

Guided Intent is our latest advancement designed to surface topics that opportunity accounts were spiking on in the weeks or months before the opportunity was created or became closed-won.

With Guided Intent, you can proactively:

- **Analyze past Intent topics that drove conversion** and **finetune your marketing strategy** based on predictive AI insights and your first-party CRM data.
- **Pinpoint which topics matter** to prospects prior to conversion, so you can **build targeted audiences and campaigns** for maximum impact.
- **Guide sellers on optimal outreach** based on proven, conversion-driving topics that spiked before an opportunity was created or closed-won.

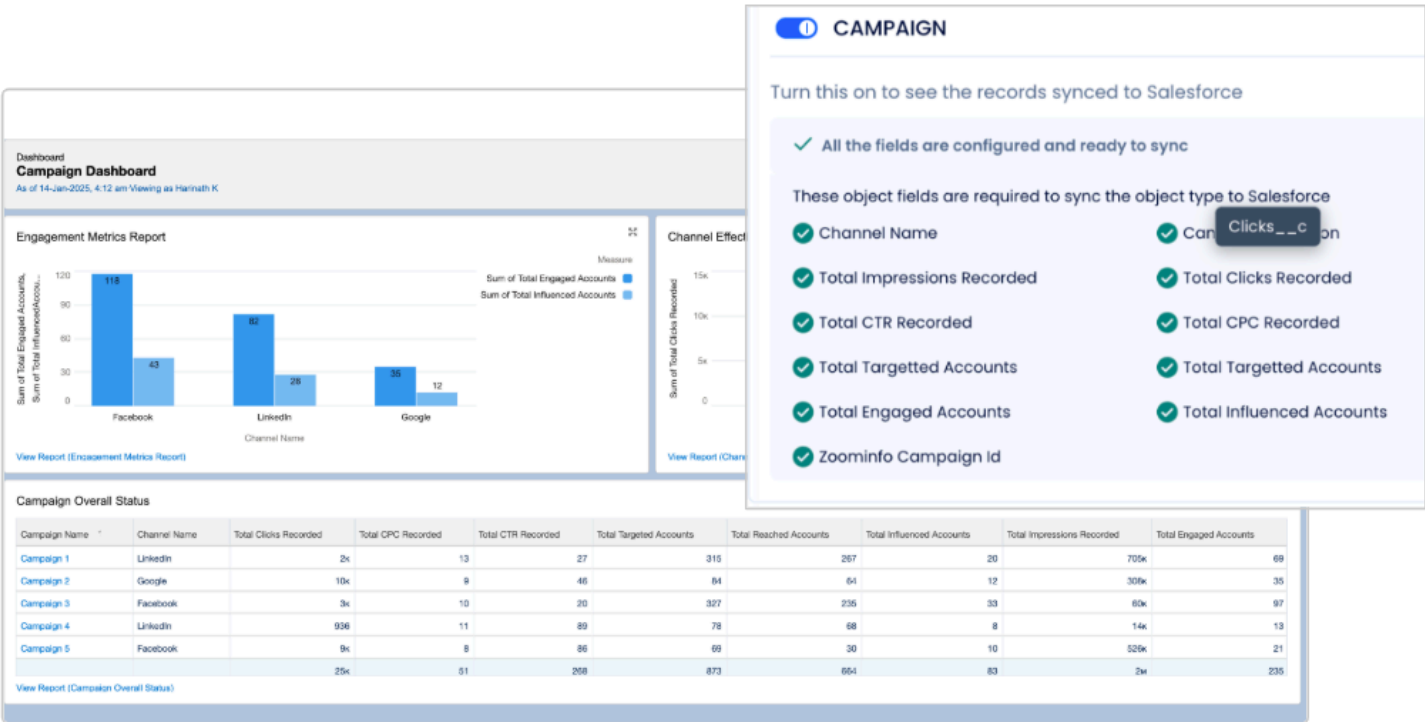
Guided Intent provides an AI-based dashboard section leveraging your first-party CRM data to identify the Intent topics associated with past created opportunities, giving you a birds eye view into the topics that matter the most for winning new business.



Enhanced Prioritize Dashboard Now Displays Marketing Campaign Metrics

View campaign performance, budget data, and account engagement metrics directly within your Salesforce instance

We've expanded the capabilities of the ZoomInfo Prioritize dashboard in Salesforce to include essential marketing campaign metrics. This enhancement enables marketing and sales teams to access critical campaign performance data, budget information, and account engagement metrics without leaving their Salesforce environment. By bringing these vital marketing insights directly into your CRM, you can make more informed decisions and optimize your marketing strategies in real-time.



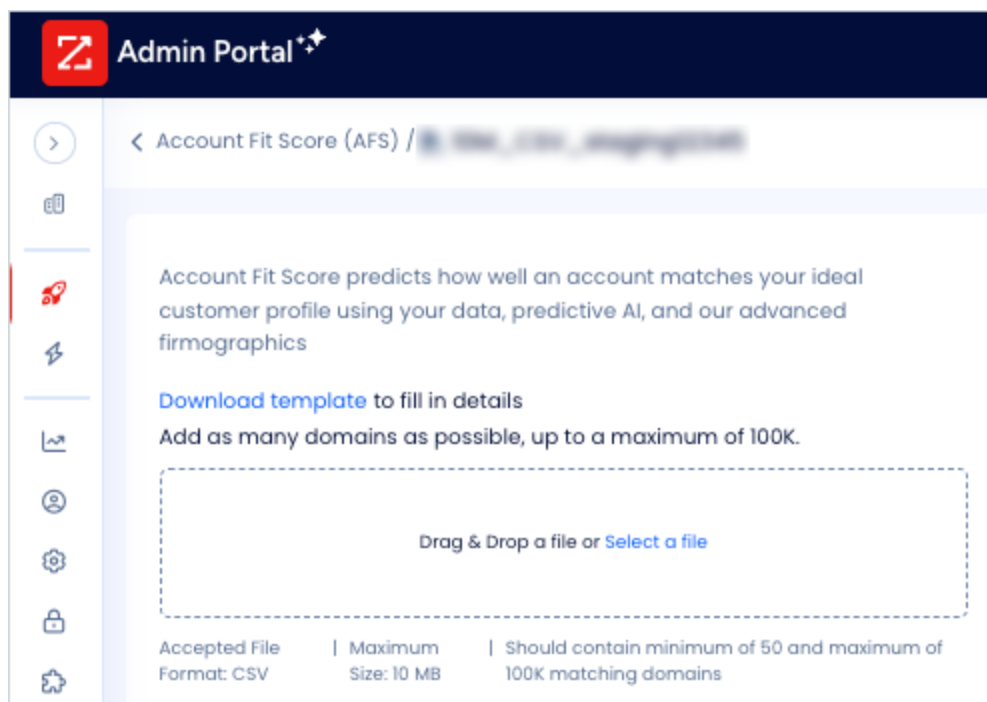
The enhanced dashboard provides a comprehensive view of your marketing activities, helping teams better understand campaign effectiveness and account engagement patterns. This integration streamlines your workflow and enables more strategic decision-making by providing immediate access to marketing ROI data within your existing Salesforce workflow.

 **Learn more**

- [How to Leverage the Prioritize Dashboard Sync in Admin Portal](#)
- [Prioritize Dashboard Implementation Guide](#)

CSV Upload Enhancements for Defining Account Fit Score

Simplified process for setting up Account Fit Score (AFS) through CSV uploads



Adaptive CSV Mapping

You can now upload CSV files containing domain information regardless of column structure or naming convention, eliminating the need for manual reformatting and reducing setup time.

Previously, the CSV upload process required strict adherence to a specific template with a single column for domain names. Now, the system intelligently identifies domain information from your CSV files by recognizing common column headers such as "url," "domain," "website," or "domain name." Any additional columns in your file are automatically filtered out, streamlining the upload process.

Now, you can simply click **Select a file** and choose any CSV file containing domain information - the column header can use variations of common terms like "url," "domain," "website," or "domain name."

Smaller Account Lists

Smaller Account Lists

With this update, we've also reduced the minimum number of accounts needed in your CSV file from 100 down to 50 accounts.

This helps smaller or more specialized organizations to leverage the same sophisticated scoring system using a smaller number of accounts that larger enterprises use to optimize their go-to-market strategy.



Learn more [Account Fit Score Explained](#)

New Sorting Options in WebSights: Revenue and Employee Size

Sort and analyze website visitor data by company revenue and employee count to quickly identify high-value prospects

WebSights has enhanced its data organization capabilities with two powerful new sorting options. Users can now sort visiting companies by revenue and employee size, making it easier than ever to identify and prioritize high-value prospects from your website traffic.

This update streamlines the process of analyzing website visitors, enabling sales and marketing teams to quickly surface organizations that match their ideal customer profile based on company size and financial indicators. Whether you're focusing on enterprise-level prospects or targeting growing mid-market companies, these new sorting options help you identify the most promising opportunities faster.

How It Works

1. Navigate to **Buying Signals > WebSights**.
2. In the **List** view of visiting companies on the **Analytics** tab, locate the new sorting options for **Revenue** and **Employee Size**.
3. Click on either column header to sort the list in ascending or descending order.
4. Use these sorting options in combination with existing filters like **Time**, **Domain Name**, and **Page Views** to further refine your view.

Note: This enhancement builds upon WebSights' existing filtering and analysis capabilities, complementing features such as tracking parameters, unique visits, and page view metrics to provide a more comprehensive view of your website visitors.

Simplified Bulk User Management with New Email-Based Option

Add multiple users to your ZoomInfo instance by simply pasting their email addresses

We've streamlined the process of adding multiple users to your ZoomInfo instance with a new email-based bulk addition feature. This enhancement to the Admin Portal allows administrators to quickly onboard teams by simply entering or pasting a list of email addresses, eliminating the need to work with CSV templates for basic user addition scenarios.

The new bulk email addition option provides built-in validation and automated field population, significantly reducing the time and effort required for user management. While the traditional CSV template method remains available for more complex user configurations, this streamlined approach offers a faster path to adding users with common characteristics.

How It Works (for Admins)

1. Navigate to **User Management > Users** in the Admin Portal and click **Add Users**.
2. Select **Bulk Add Users**, then click **Add by Email**.

3. Enter or paste the email addresses for your new users in the provided space and click **Next**.

The screenshot shows the 'Bulk Add Users' dialog with the 'Confirm Details' step selected. On the left, a progress bar shows 'Add Users' and 'Confirm Details' as completed steps, and 'Finalize Setup' as the next step. The main area is titled 'Confirm Details' and contains a table with columns: 'User Email', 'User Name', 'First Name', and 'Last Name'. There are five rows of user data, each with a trash icon on the right. At the bottom, there is a green status message: 'Successfully matched emails with user data'. Navigation buttons at the bottom right include 'Cancel', 'Back', and 'Next'.

4. Review and confirm the automatically populated user details (User Name, First Name, Last Name) on the **Confirm Details** screen and click **Next**.

The screenshot shows the 'Bulk Add Users' dialog with the 'Finalize Setup' step selected. On the left, the progress bar shows 'Add Users', 'Confirm Details', and 'Finalize Setup' as completed steps. The main area is titled 'Finalize Setup' and contains several configuration options: 'Select subscription plan for users' with a dropdown menu; 'Credit Limit' with radio buttons for 'Unlimited' (selected) and 'Limit to' (with a value of 0 and a 'Select Reset Term' dropdown); 'Users are admins' with radio buttons for 'No' (selected) and 'Yes'; and 'Send welcome email to users' with radio buttons for 'No' (selected) and 'Yes'.

5. On the **Finalize Setup** screen, configure shared settings including subscription plans, credit limits, and admin access.
6. Choose whether to send welcome emails to the new users.

Important Considerations

- This method works best when adding users who will share the same settings (subscription plans, credit limits, and access levels)
- For different user groups with varying access needs, perform separate bulk additions

- Be cautious when setting admin privileges, as they will apply to all users in the bulk addition
- If you need to set unique characteristics for individual users, consider using the CSV template method instead

Manage Enterprise API Access in the Admin Portal

Manage API access permissions directly through User Management settings

We've streamlined how administrators manage Enterprise API access for their users. This enhancement simplifies the process of granting and monitoring API access permissions through the Admin Portal's User Management interface, eliminating the need to navigate between different sections of the portal.

The new capability provides greater visibility and control over API access across your organization, making it easier to manage which users can leverage ZoomInfo's comprehensive B2B data through the Enterprise API. Administrators can now view API access status for all users at a glance and quickly modify permissions as needed.

How It Works

1. From the Admin Portal **Settings Menu**, select **User Management > Users**.
2. Click the user you want to grant API access to in the user list.
3. Enable the **API Access** option in the user configuration settings.

The screenshot displays the Admin Portal interface for user management. At the top, it shows 'All Users (212)' and credit usage statistics. Below this is a table of users with columns for Full Name, Email, Group, Role, CRM, Views, Bulk Credits, Monthly Credits, Last Access, and API Access. The 'API Access' column shows 'No' for the selected user. To the right of the table is a configuration panel for the selected user. In this panel, the 'API Access' checkbox is checked and highlighted with a red box. Other settings include First Name, Last Name, Email, User Name, Subscription, Is Admin, Bulk Credit Limit, Bulk Credit Usage, Monthly Credit Usage, Additional Actions, and Role.

4. Click **Save**.

When viewing the list of users an **API Access** column now displays a clear **Yes/No** status for each user's API access permissions. This provides administrators with immediate visibility into which users have API access capabilities across the organization.