Salesforce Integration Guide

For administrators setting up the ZoomInfo integration with Salesforce

Prerequisites and Considerations

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

Salesforce REST API Requirement

The Salesforce Rest API is required for the ZoomInfo integration with Salesforce to function. The REST API is included with Force.com, Enterprise, Developer, Performance, and Unlimited Editions. If you have any other version of Salesforce (e.g., Professional), you'll need to purchase access to the REST API.

Permissions

The following permissions are needed in Salesforce:

- Permission to read the org ID in Salesforce
- Permission to “view setup and configuration”
- Permission to "Run Reports"
- Access to API
- Read/write access to standard objects (Account, Contact and Lead) and standard and custom fields within each object.
- Read/write access to the Campaign and Campaign Member object
- Read access to the Opportunity object in Salesforce
- Read access to the User object in Salesforce
- Read access for additional objects outlined in Salesforce Import section
- You have two options for applying duplicate checking logic. Required permissions depend on the option you select:
    - Option 1: Standard ZoomInfo Duplicate Checking. This option requires read/write access on the Salesforce fields for accounts, contacts and leads in order for ZoomInfo to query and identify duplicates.
    - Option 2: Custom Duplicate Checking. This option requires Author Apex permissions to utilize Salesforce duplicate rules.

Install the Salesforce Native Application

Enhance your Salesforce integration experience and capabilities by also installing the **ZoomInfo Salesforce Native Application**.

The Native App provides:

- **Inline access to ZoomInfo data**: Users get inline access to ZoomInfo data when viewing lead, contact, and account records in Salesforce.
- **A ZoomInfo custom object**: Admins can utilize a custom object called "ZoomInfo" to capture all possible data fields available in the default mapping without having to map every field in custom mapping settings. A Salesforce admin can then make this data available for users as a related list for account, contact, and lead records.
- **Scoops and Intent custom objects**: Admins can set up additional custom objects to export ZoomInfo Scoops and Intent data and display it as a related list in Salesforce account records.

See the Salesforce Native App Implementation Guide for details on how to download, install, and configure the latest version of the Native App from the Salesforce AppExchange.

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 Salesforce fields and behavior for each field when exporting.
5. Configure Salesforce Import, which is enabled by default to allow ZoomInfo to import and analyze information about your team and prospects/customers from Salesforce.
6. Configure Salesforce 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 Salesforce, you must configure how you connect to Salesforce 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 Salesforce connection issues for your users.

The Basics

- As a best practice, utilize a Salesforce integration user as described in the Salesforce documentation. However, any Salesforce user account that has the required Salesforce permissions as well as admin access in ZoomInfo can be used as the service account connection.
- All exports and Salesforce Filtering jobs will be run using this account.
- Other ZoomInfo admins and users will not need to connect to Salesforce using their own credentials.
- Assuming your org's ZoomInfo user accounts match to Salesforce user accounts, exports will be associated with the user that made the export, including any applicable lead assignment rules you've configured in Salesforce.

Primary Connected Admin and Secondary Admins

Primary Connected Admin

- The ZoomInfo admin that makes the initial connection to Salesforce is considered the *primary connected admin*.
- Only the primary connected admin can disconnect the connection to Salesforce.
- Any other ZoomInfo admins defined in your organization can manage the configuration settings such as adjusting mapping, export settings, and filtering. However, these admins cannot directly disconnect the connection to Salesforce.

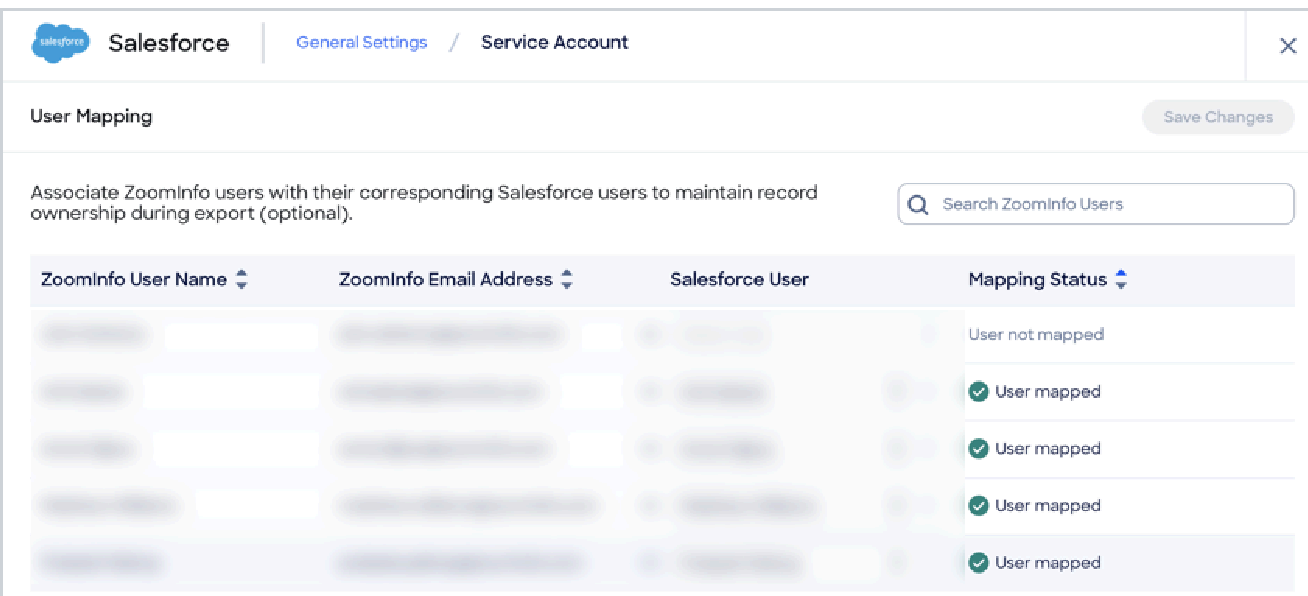
Secondary Admins

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

- Can view the existing Salesforce integration configured for the org without connecting their own Salesforce account to Zoominfo.
- Can manage the configuration settings such as adjusting mapping, export settings, and filtering.
- Can disable all exports for users by toggling off the connections.
- Can switch the service account user by using the **Change User** option on the **General Settings** page for the integration (Service Account option only). Ensure the new service account user has the same set of [Salesforce permissions]() as the previous user.
- Cannot directly disconnect the connection to Salesforce. However, a secondary admin can become the primary admin by using the **Change User** option on the **General Settings** page for the integration.

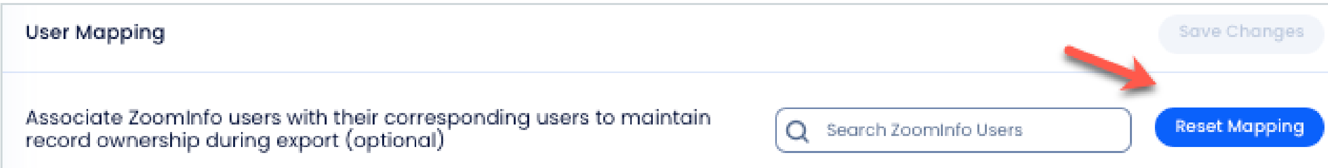
ZoomInfo and Salesforce User Account Mapping

It's important that your ZoomInfo users map to Salesforce users to ensure proper record ownership assignment when using the Service Account connection option. This preserves ownership in Salesforce 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 Salesforce 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.
- The **Created By** and **Last Modified By** value for each record will reflect the primary connected admin.
- If your organization has configured lead assignment rules in Salesforce, the logic described in Lead Assignment Rules applies. Note the following:
    - If a user exports 25 net new records or less, the lead assignment rules will be used to set the record owner.
    - If a user exports 26 net new records or more, the lead assignment rules are not applied and the records will be owned by the user that performed the export.

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

- The record **Owner**, **Created By** and **Last Modified By** fields will reflect the primary connected admin.
- If your organization has configured lead assignment rules in Salesforce, the logic described in Lead Assignment Rules applies. Note the following:
    - If a user exports 25 net new records or less, the lead assignment rules will be used to set the record owner.

    - If a user exports 26 net new records or more, the lead assignment rules are not applied and the records will be owned by 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 Salesforce.

Individual User Account Connections

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

- Ensure that your org's users have the required permissions in Salesforce.

- You'll still need to make the initial admin connection for the integration using Salesforce 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

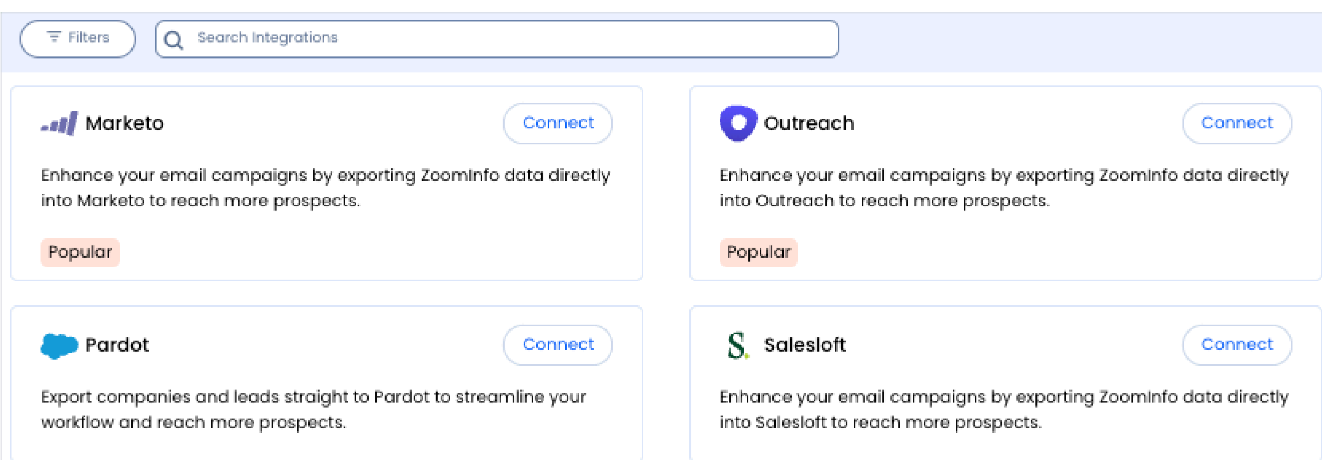
To be able to export from ZoomInfo to Salesforce, each user must connect to Salesforce using their own credentials.

- 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 Salesforce.

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

Get Connected

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



2. Find the Salesforce integration and click **Connect**.

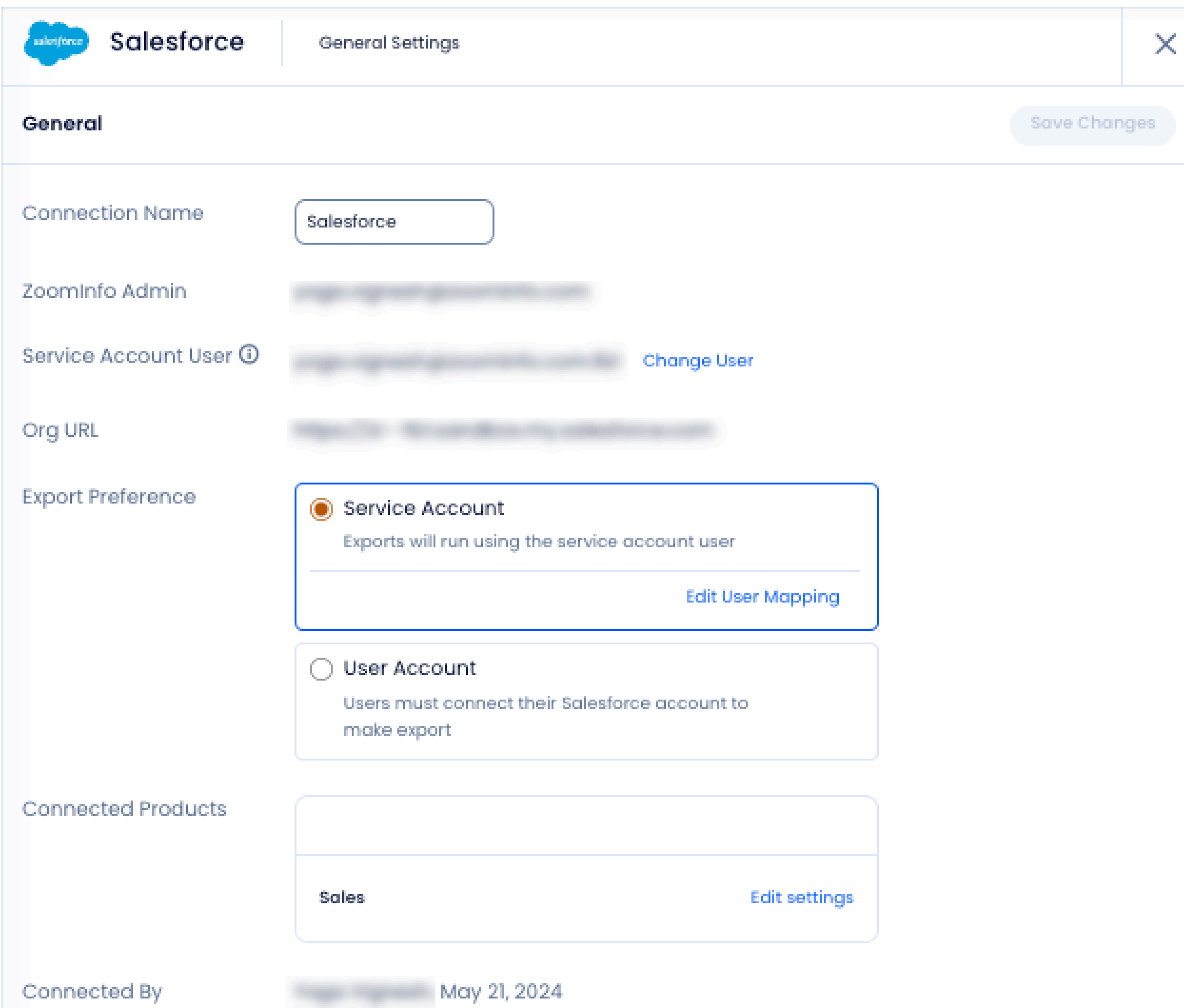
    - The **Service Account** is the default preference. Therefore, when you make this connection, the Salesforce credentials you provide will be set as your **Service Account**.

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

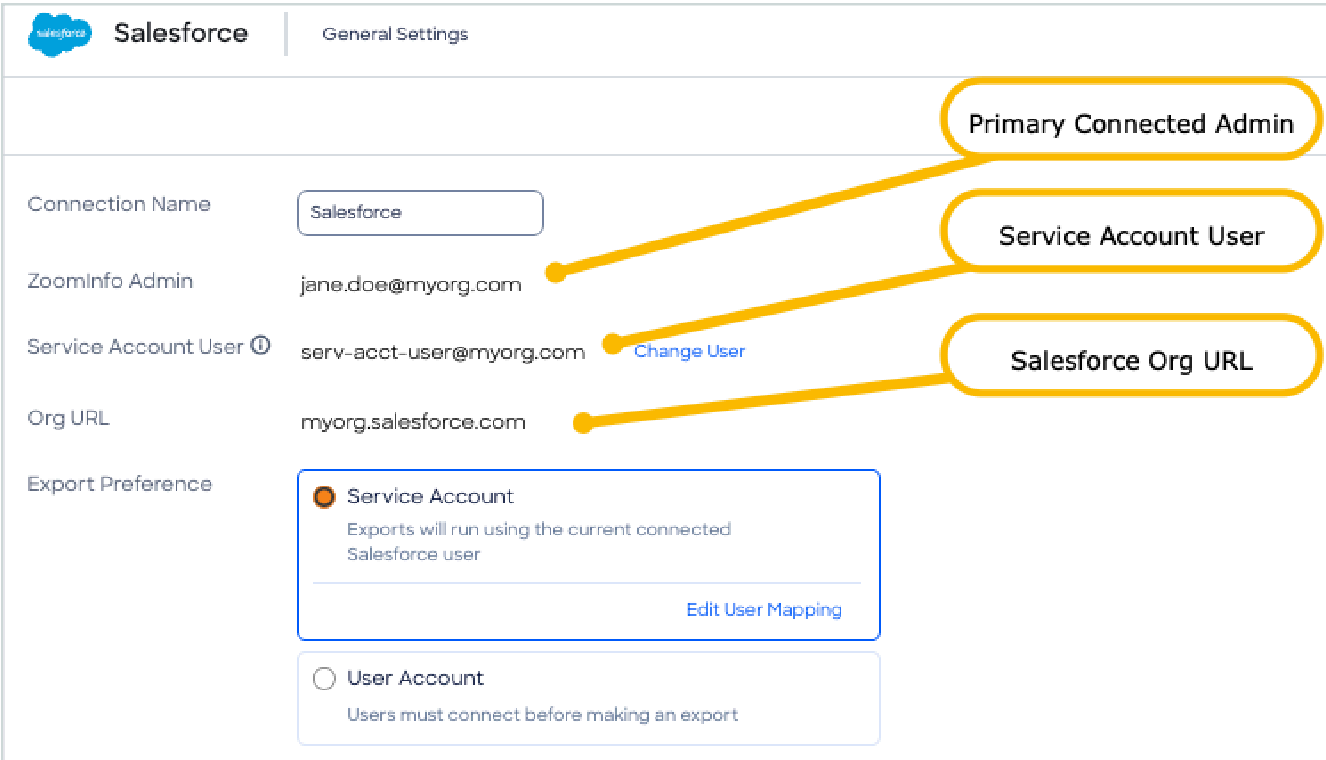
    - You can alternatively change the default preference of **Service Account** to **User Account** after making the initial connection.

3. Enter your Salesforce credentials.

    Click **Edit Settings** on the success message to be directed to the **General Settings** page for the Salesforce integration.

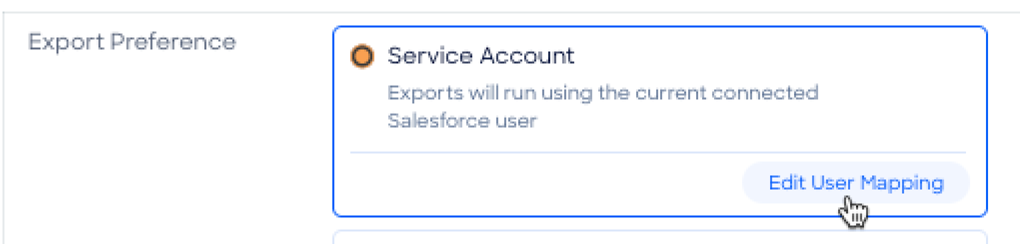


4. Note that your ZoomInfo account is listed as the **ZoomInfo Admin**, the **Service Account User** is the account with which you connected the integration, and the **Org URL** reflects your Salesforce org instance.

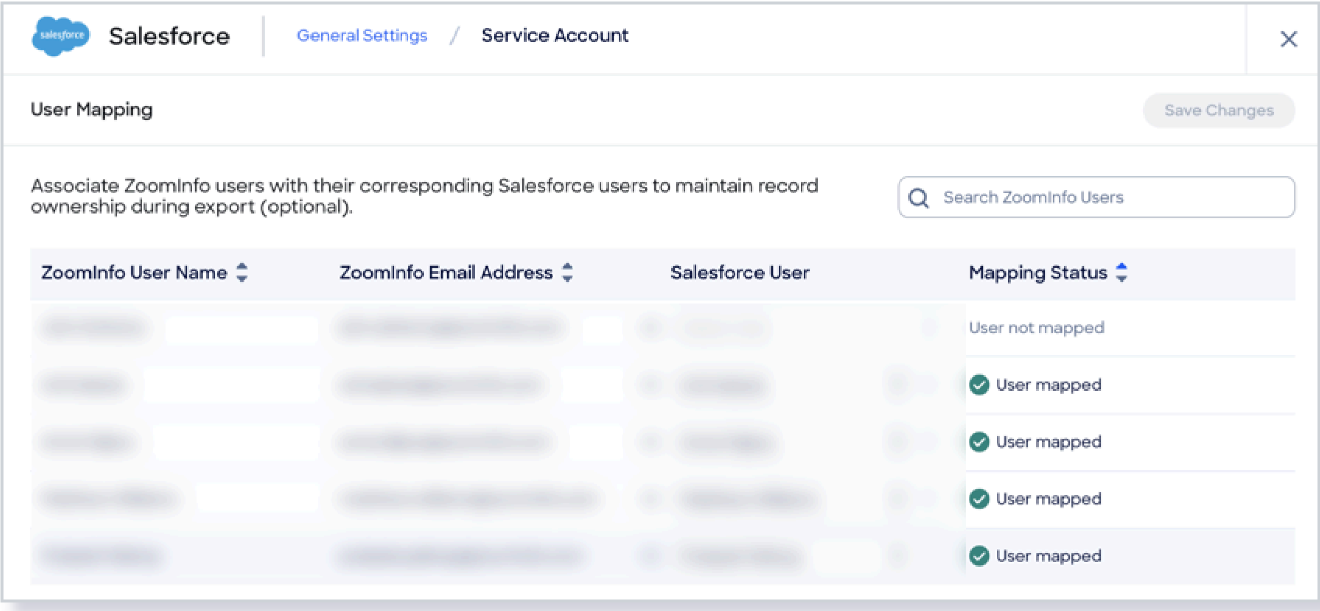


5. Decide whether you'll use the default **Service Account** option, or change to the **User Account** option. If you select the **User Account** option, go to step 6.

   a. Assuming you choose to use the default **Service Account** option, click **Edit User Mapping**.



The **User Mapping** page displays.



ZoomInfo attempts to map each ZoomInfo user to a corresponding Salesforce user using the **ZoomInfo Email Address**. If this is not successful, we attempt to match the ZoomInfo user using the user's full name in Salesforce.

- Typically, you should see correct user mappings assuming your org's users use the same email address for both ZoomInfo and Salesforce.
- If the **Salesforce User** field does not have a user selected, click the dropdown and select a user.
- If the Salesforce user field has multiple matches, choose the appropriate user.

b. If you've made updates to the **User Mapping** page, click **Save Changes**.

c. Continue to [Configure Export Settings](#).

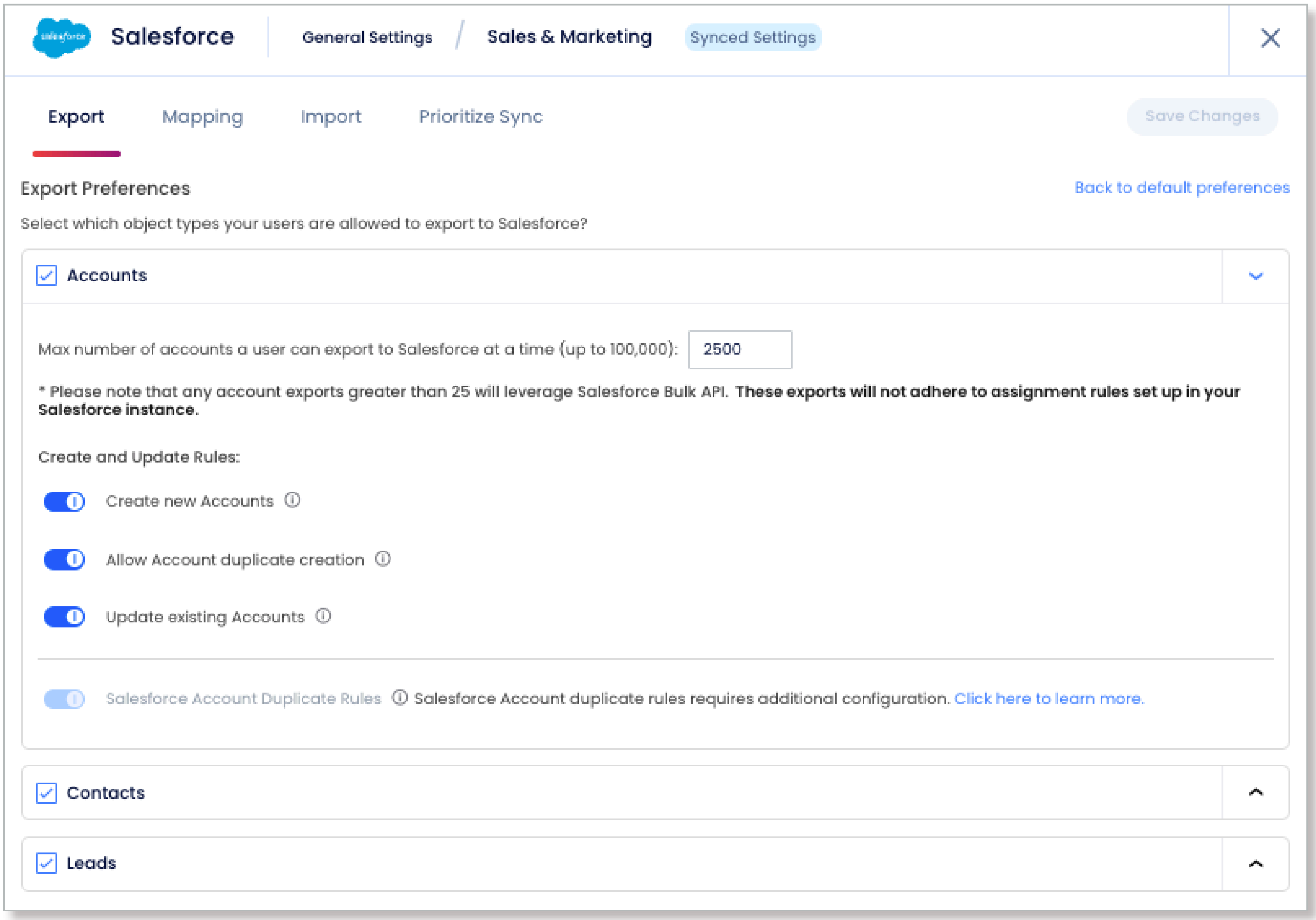
6. If you elect to use the **User Account** option, you've already connected to Salesforce and must finish configuring the integration (e.g., export settings, mapping, and Salesforce Filtering). Continue to [Configure Export Settings](#).

Configure Export Settings

With your integration successfully connected (but not yet turned on for your organization), you can configure export preferences and limit the objects that can be exported.

1. From the **General Settings** page for the integration, select **Edit settings**.

2. Click the **Export** tab.



3. Select each object type you want your users to be able to export to Salesforce.

4. For each object type, set a maximum number of records a user can export to Salesforce at one time (up to 100,000).

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

API Consumption and Behavior

For exports of 199 records or fewer: Exporting 199 records or fewer leverages the Salesforce REST API.

For exports of 200 records or more (max 100,000): Exporting 200 or more records (max 100,000) requires Salesforce Bulk API access.

The following table models API consumption when your users export ZoomInfo records to Salesforce.

Total Records Exported From ZoomInfo To SFDC	Records To Be Created in SFDC	Records To Be Updated In SFDC	SFDC Rest API Consumption	SFDC Bulk API Consumption	Notes
200	200	-	1	-	
200	-	200	1	-	
200	100	100	2	-	See footnote[1]
201	201	-	-	1	
201	-	201	-	1	
201	101	100	-	2	See footnote[2]
201 to 100K	201 to 100K	-	-	1	
201 to 100K	-	201 to 100K	-	1	

Important Native App consideration: Unlike the direct integration with Salesforce from the ZoomInfo platform, the Native App does not leverage the Salesforce Bulk API when performing exports. For this reason the export limit through the Native App is 5,000, not 100,000.

Lead Assignment Rules

For exports of 200 records or fewer: Exporting 200 or fewer records as leads, the lead assignment rules in your Salesforce system will be activated, but this only applies if new records are added to the system.

For exports of 201 records or more (max 100,000): Exporting 201 or more records as leads, the lead assignment rules in your Salesforce system will not be activated.

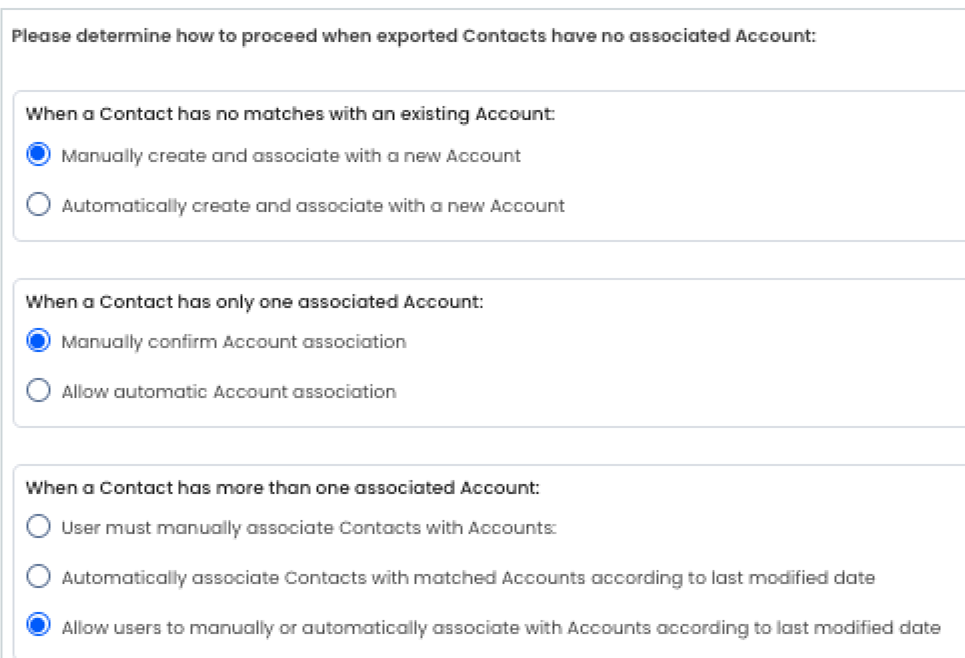
[1] In this example, 1 REST API call is made to create 100 records, and 1 REST API call is made to update 100 records.
[2] In this example, 1 Bulk API call is made to create 101 records and 1 Bulk API call is made to update 100 records.

The following table illustrates how lead assignment rules are triggered when your users export ZoomInfo contacts to Salesforce as leads.

Total Records Exported From ZoomInfo To SFDC	Records To Be Created in SFDC	Records To Be Updated In SFDC	Lead Assignment Rules Triggered?
25	25		Yes
25	10	15	Yes In this example, if records are exported as leads, then lead assignment rules will be triggered for only the 10 records created
26 or more	26 or more		No
26 or more		26 or more	No

Account Association When Exporting Contacts

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 Salesforce.



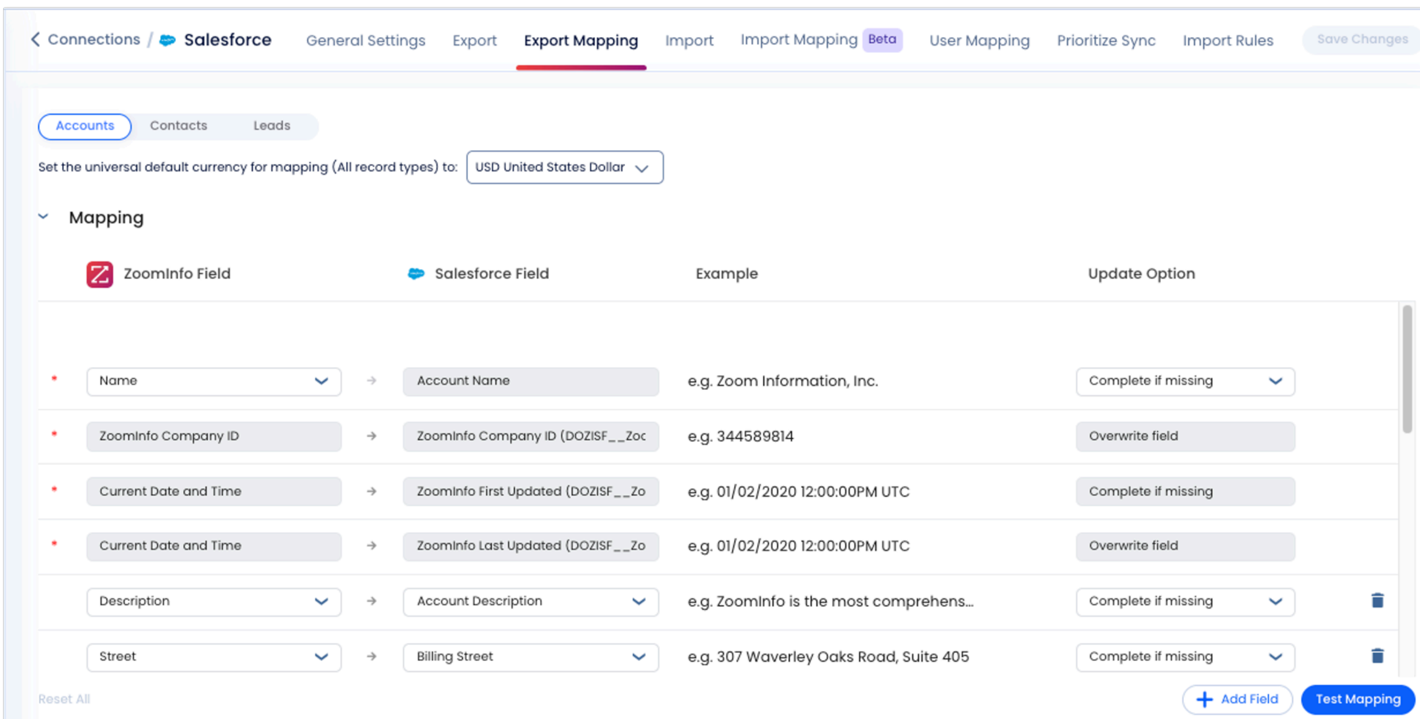
ZoomInfo recommends that you set account association options to "manual" (which is the default for all three options), and let the user determine the account association when exporting 26 or more contacts. Using these options:

- 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 and optionally enable Scoops, Intent, and ZoomInfo Custom Object exports.

1. Click the **Export Mapping** tab.



Note: The gray fields shown above are only included if you've installed the [Salesforce Native Application]().

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

Add or Remove Fields

Add fields by clicking **Add Field** 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.

Set a Hierarchy for ZoomInfo Data Within a Single Salesforce Field

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

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

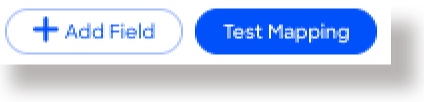
1. Map **Direct Phone** to **Business Phone**.
2. Map **Company Phone** to **Business Phone**.

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

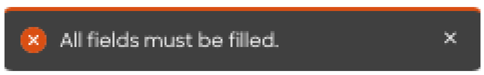
Field hierarchy allows for both first and second choice values for selected Salesforce properties. For exported records where more than one data point is available from ZoomInfo (such as phone numbers) you can prioritize the data by preference within your mapping.

Test and Save

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

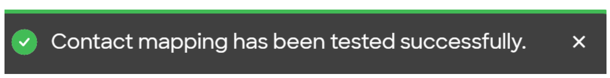


- If the test record cannot be created, this is typically due to an error in the mapping settings. For example, mappings cannot be saved with a blank field.

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

- If the test is successful, a notification displays.

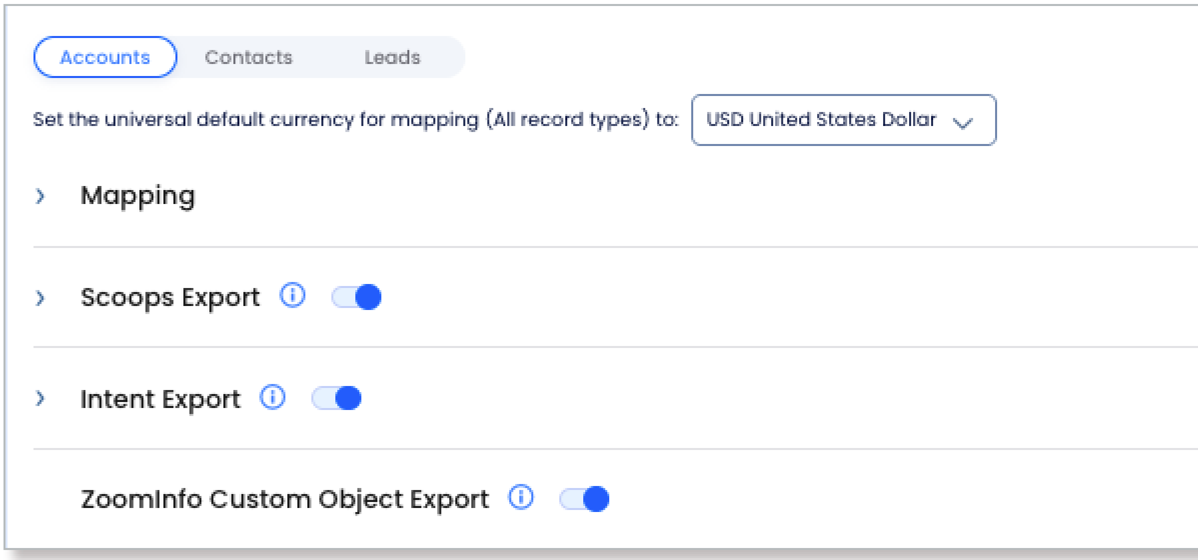
  

After performing a successful test mapping, click **Save Changes**.

- 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.

Configure Exports to Custom Objects

ZoomInfo provides three custom objects in the Native App package to make it easy for Salesforce users to consume ZoomInfo data in their account, contact, and lead records without leaving Salesforce.



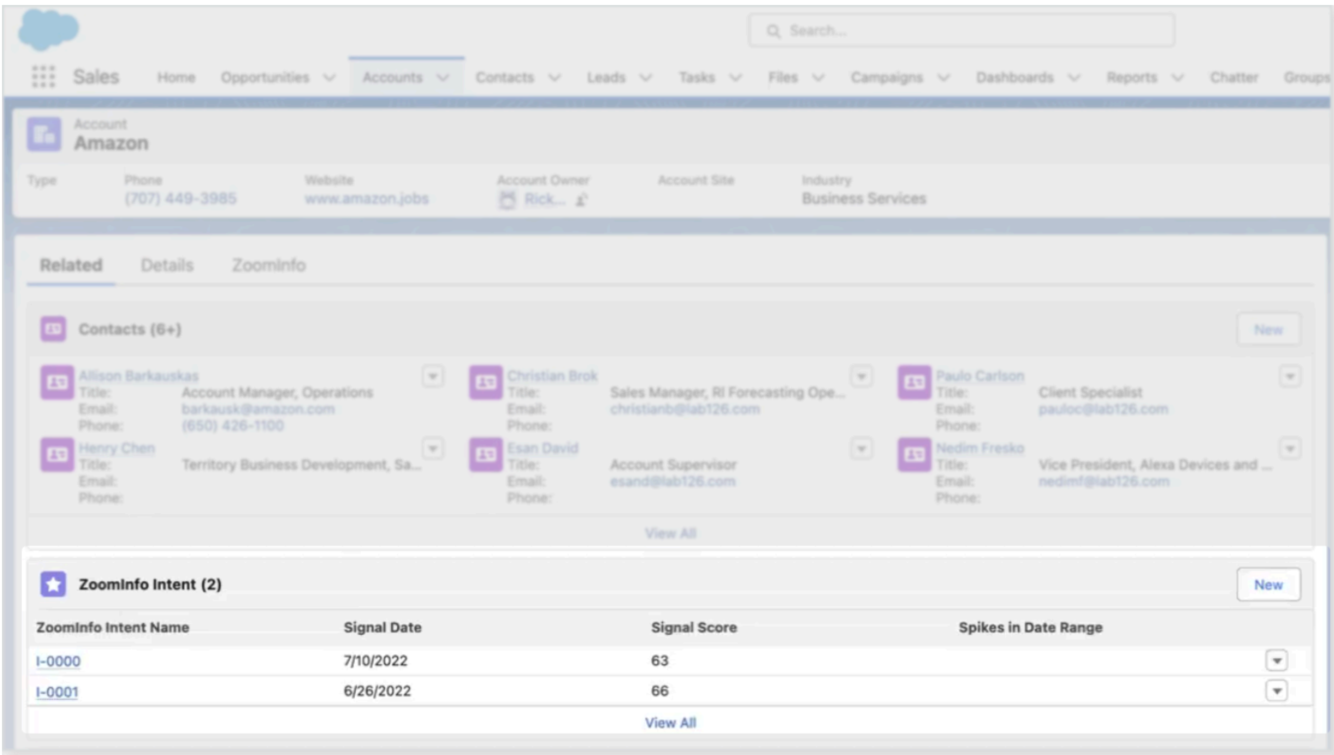
Each export type is enabled using a custom object in Salesforce:

- **Scoops Custom Object**: Captures ZoomInfo Scoops data. Scoops are categorized topics about projects, pain points, funding, leadership information.
- **Intent Custom Object:** Captures ZoomInfo Intent data. Intent data can be used to identify when companies are actively displaying a signal of intent to purchase.
- **ZoomInfo Custom Object**: Captures all possible ZoomInfo data fields available for the object without having to map every field in custom mapping settings. By using the custom object, you'll continue to get the ZoomInfo data you want in your Salesforce records custom mapping settings while also having access to the full data for contact and company records you've purchased - without expending any additional credits.

Each of these custom objects can be displayed on a related list for account, contact, and lead records, enabling users to easily explore the complete ZoomInfo data for that object.

- Intent is only available for account records
- Scoops are only available for account records

Here's an example of ZoomInfo Intent displayed in a related list for an account.



Prerequisite: Install the ZoomInfo Native Application

Installing the Native App in your Salesforce instance is required before you can enable the export of ZoomInfo data to one or more custom objects.

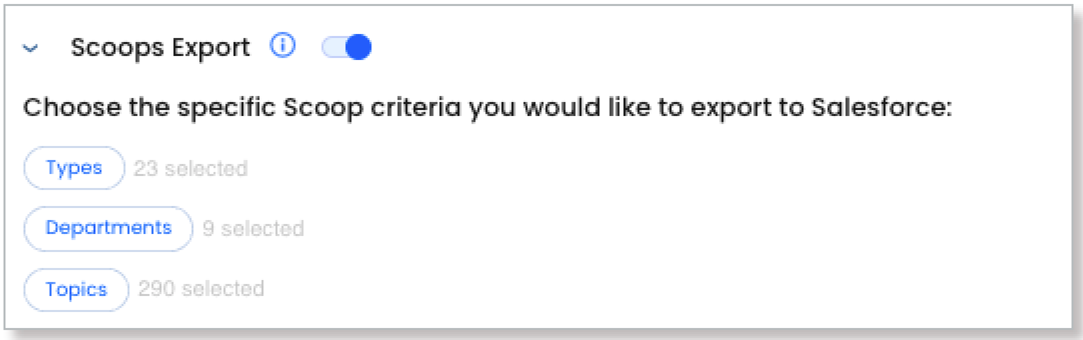
See the [Salesforce Native App Implementation Guide] for details on how to download, install, and configure the latest version of the Native App from the Salesforce AppExchange.

Configure Scoops Export

On the **Mapping** tab, you can export Scoops (at the account level) to Salesforce as a custom object.

1. Enable the toggle.
2. Select your Scoops criteria.

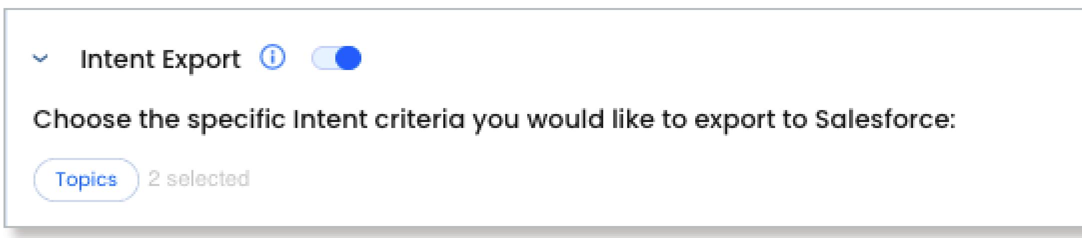
3. Ask your Salesforce admin to add the **ZoomInfo Scoops** custom object to a related list for **account** records.



Configure Intent Export

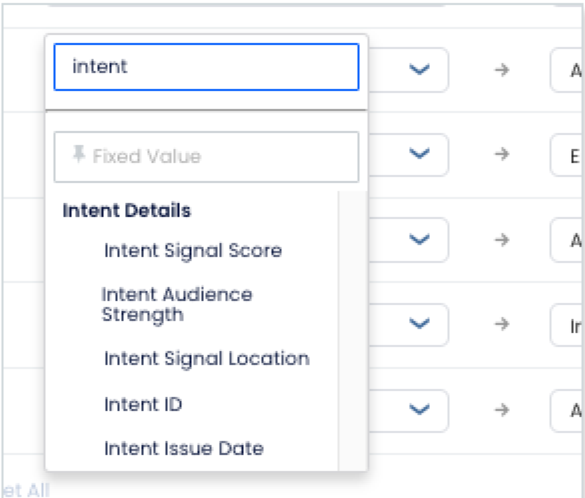
You can also export Intent (at the account level only) to Salesforce.

1. Enable the toggle.
2. Select your Intent topics.
3. Ask your Salesforce admin to add the **ZoomInfo Intent** custom object to a related list for **account** records.



Alternative: Capture Intent Using Custom Fields

If you decide not to install the ZoomInfo Native App, you can instead set up custom fields in Salesforce 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

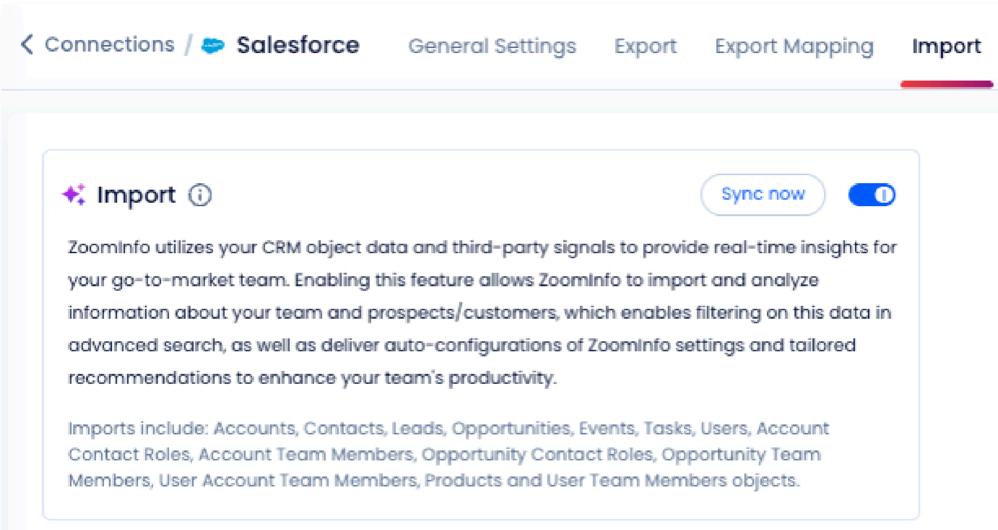
To map all of the possible Intent data points to custom fields, you'll need to create 5 custom fields *per Intent topic*, as the custom field in Salesforce is dedicated to capturing Intent data for each specific topic. For example, if your organization has subscribed to 6 Intent topics, and you want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

Configure ZoomInfo Custom Object Export

1. Enable the toggle
2. Ask your Salesforce admin to add the **ZoomInfo** custom object to a related list for **account**, **contact**, and **lead** records.

Salesforce Import

ZoomInfo utilizes your Salesforce data to provide timely insights for your go-to-market team. When you connect the Salesforce 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 Salesforce integration with ZoomInfo:

- **Comprehensive Data Integration**: ZoomInfo aggregates extensive Salesforce 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 Salesforce 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 Salesforce, facilitating a user-friendly experience for building advanced searches.

- **Signal Routing**: When a funding signal from ZoomInfo intersects with your org's Salesforce 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 Salesforce. 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 Salesforce.

• Account • Contact • Lead • Opportunity • Opportunity Field History • Opportunity History • Opportunity Stage • Product2 • Event • Task	• User • AccountContactRole • AccountTeamMember • OpportunityContactRole • OpportunityLineItem • OpportunityTeamMember • UserAccountTeamMember • UserTeamMember

For each Salesforce 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 Salesforce objects and fields.

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

- **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 leverages Salesforce's Bulk API and 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). Salesforce provides a limit for the number of API calls which can be used by an organization.

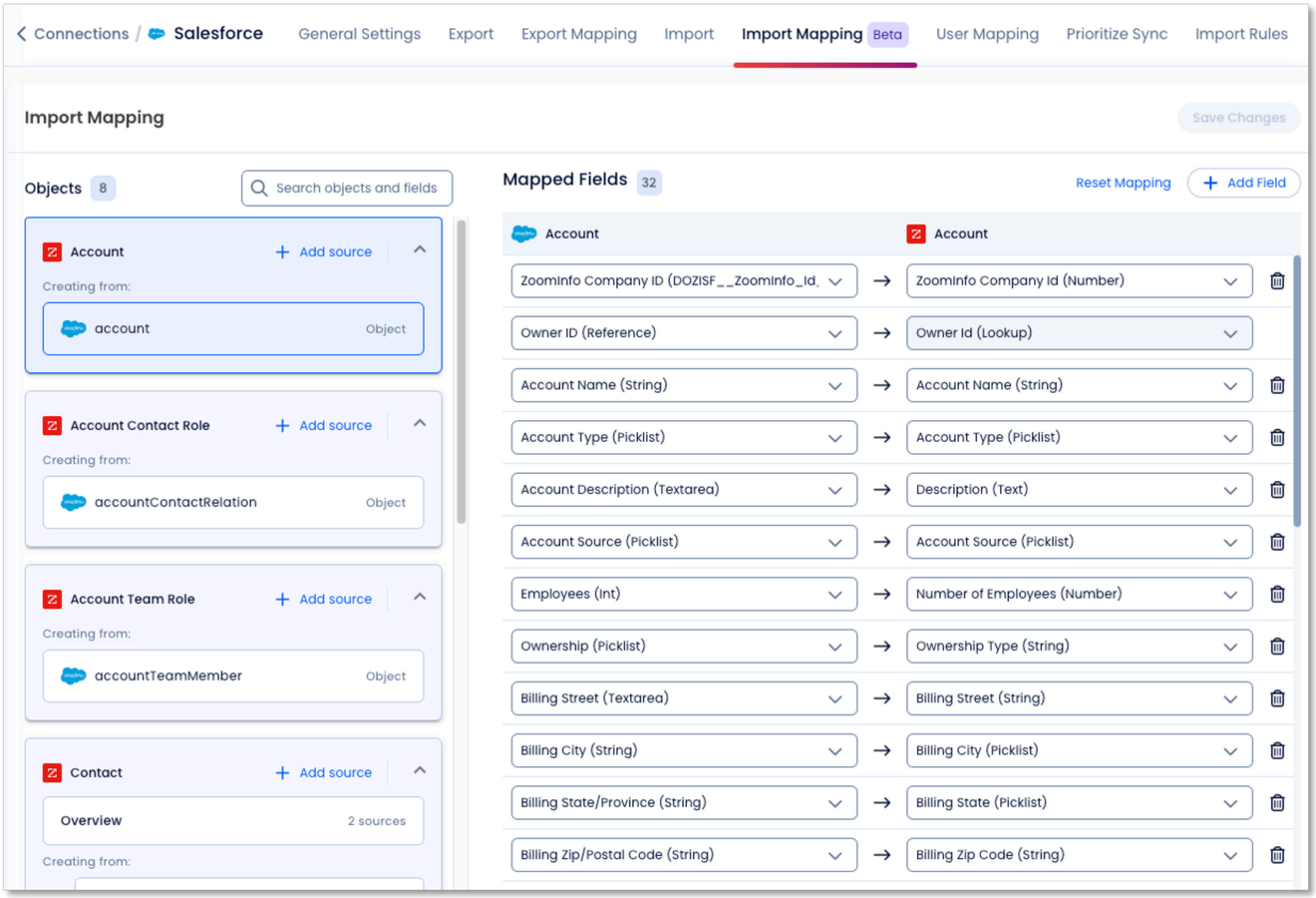
- Salesforce records are queried using the Bulk API in batches of 10,000. So 1 million records will consume 100 Bulk API calls.
- Check with Salesforce Support to confirm how many API calls your organization has access to (daily limits).
- Backfill Syncs: ZoomInfo runs backfills when all records must 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 Salesforce 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

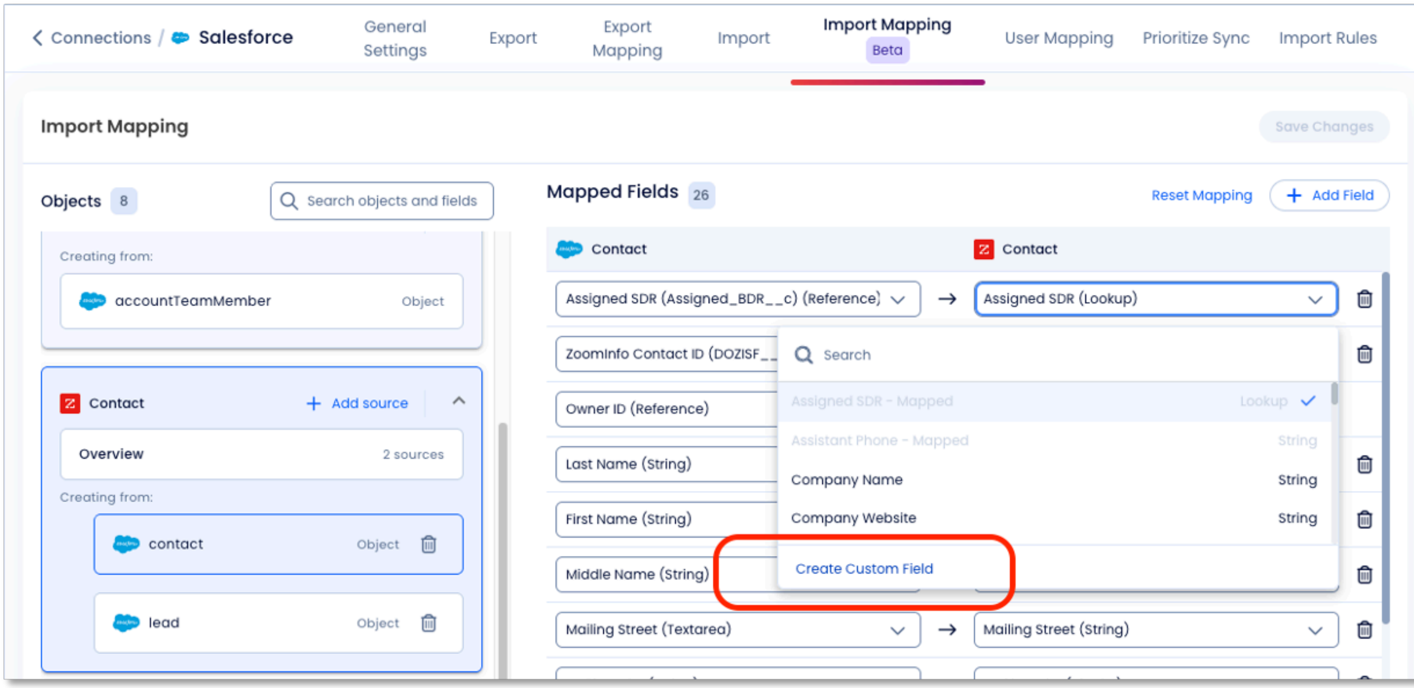
Use the drop down to update the default field mapping. Additional fields without default mapping can be found through the "Add fields" button and using the search on dropdown.



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

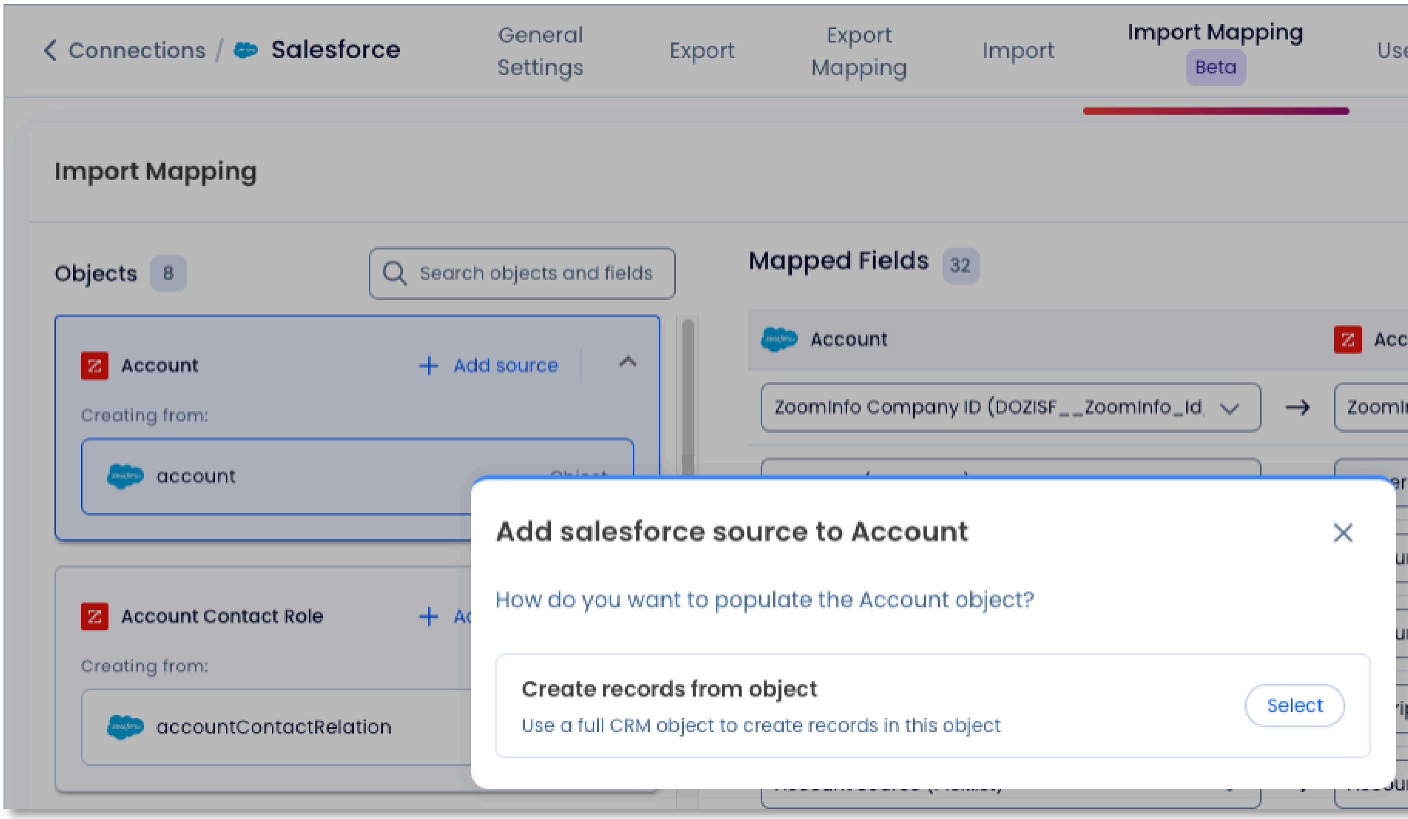
- **Account:** Account Name, Account Type, Annual Spend (Current ACV), Domain, HQ Phone, Owner Id, Website, ZoomInfo Company Id
- **Contact** (for Salesforce Lead and Contact)**:** First Name, Last Name, Do No Email, Email, Job Title, Department, Mobile Phone, Owner Id, ZoomInfo Contact Id
- **Opportunity:** 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 Salesforce field in the dropdown, and click **Create Custom Field** on the ZoomInfo GTM field dropdown.

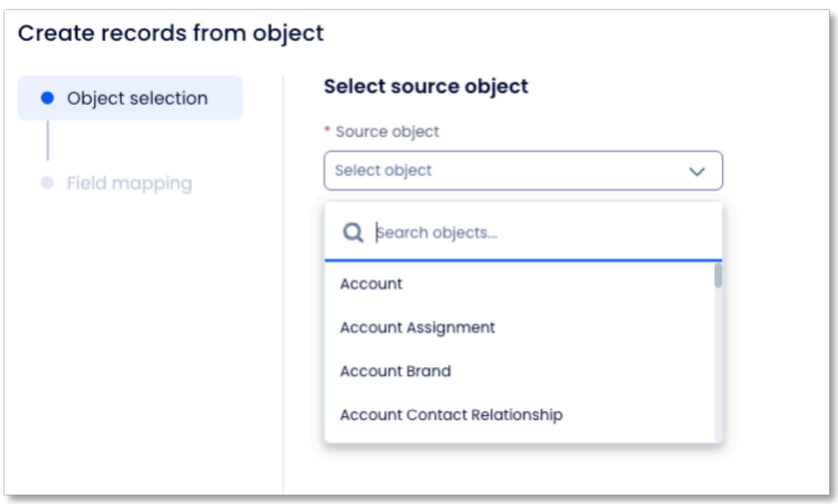


Custom Objects

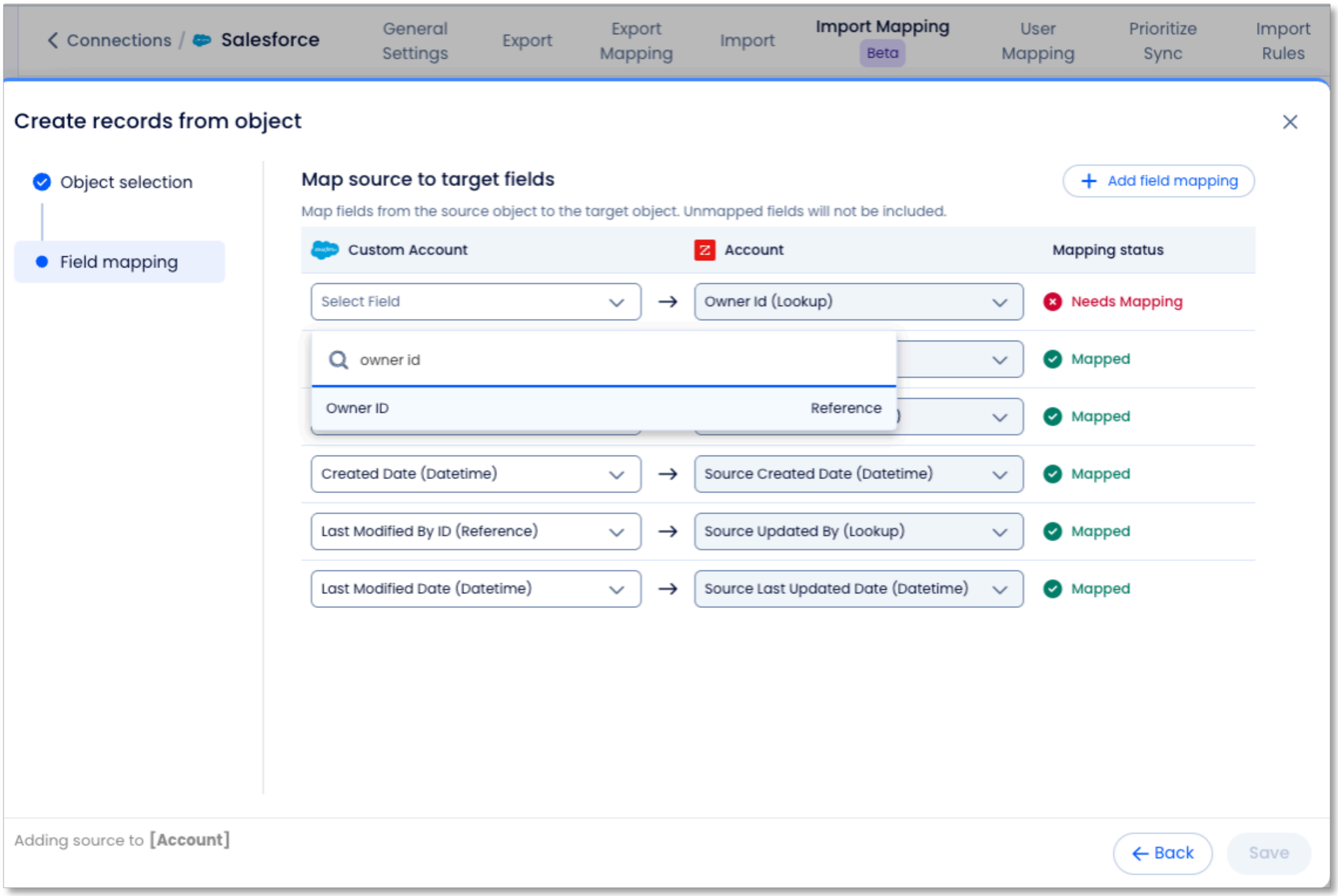
To replace a standard Salesforce Object with a custom Salesforce Object, click **Add source** on the target GTM Data Model object and select **Create records from object**



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



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

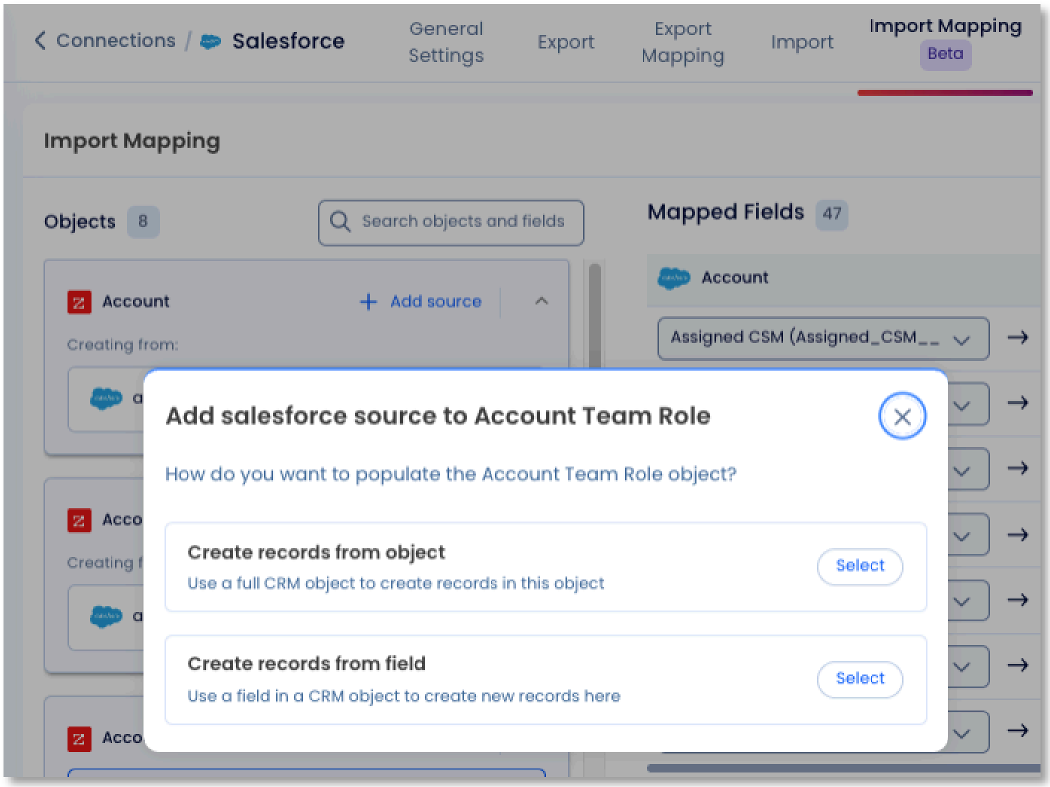


Note: While custom Salesforce Objects can be mapped to GTM Data Model objects, this data won't appear in Advanced Search Filters.

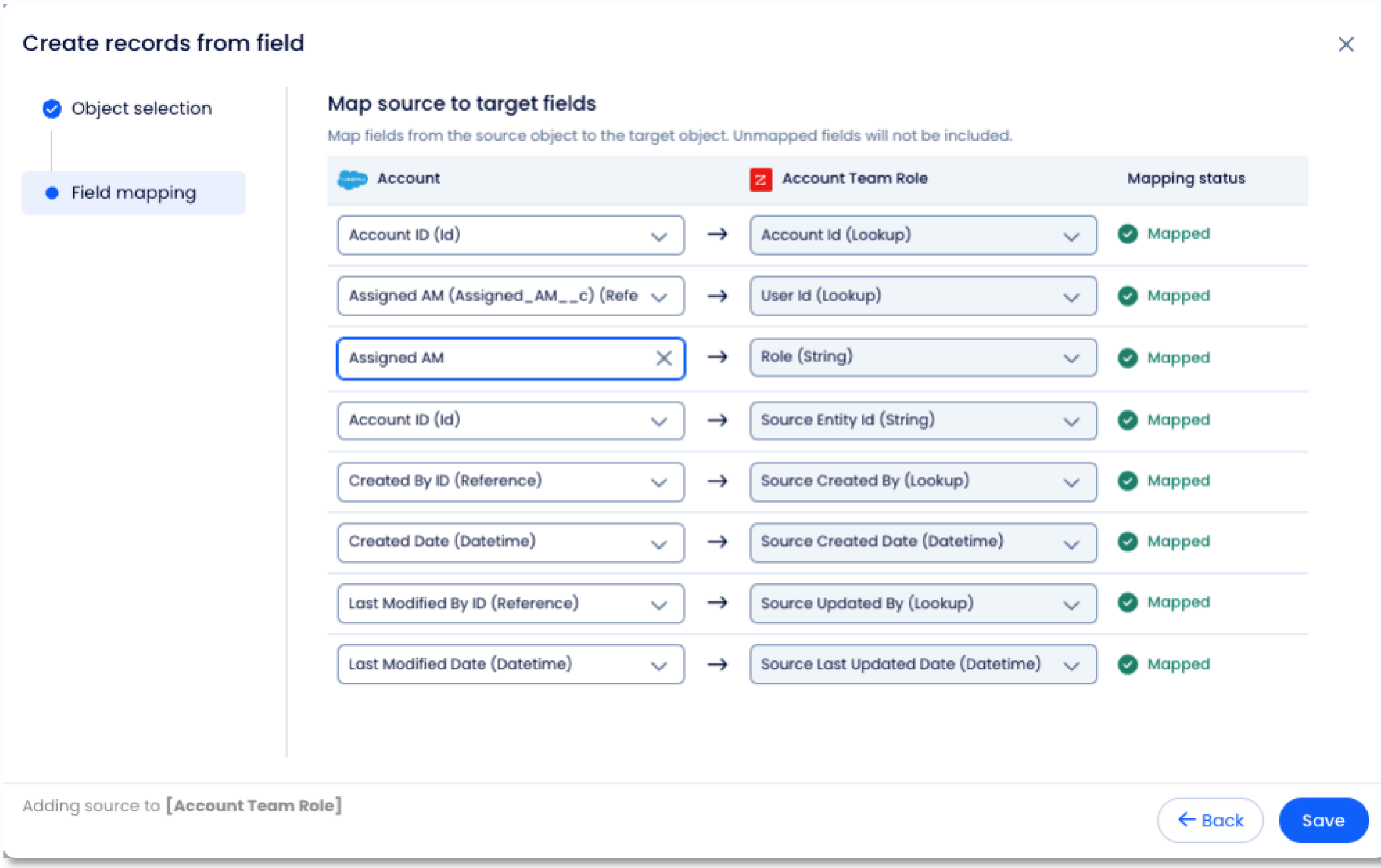
GTM Role Records from Fields

To support customers who store role information (such as Account Team roles) in custom fields in addition to or in lieu of the AccountTeamMember object, 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**.

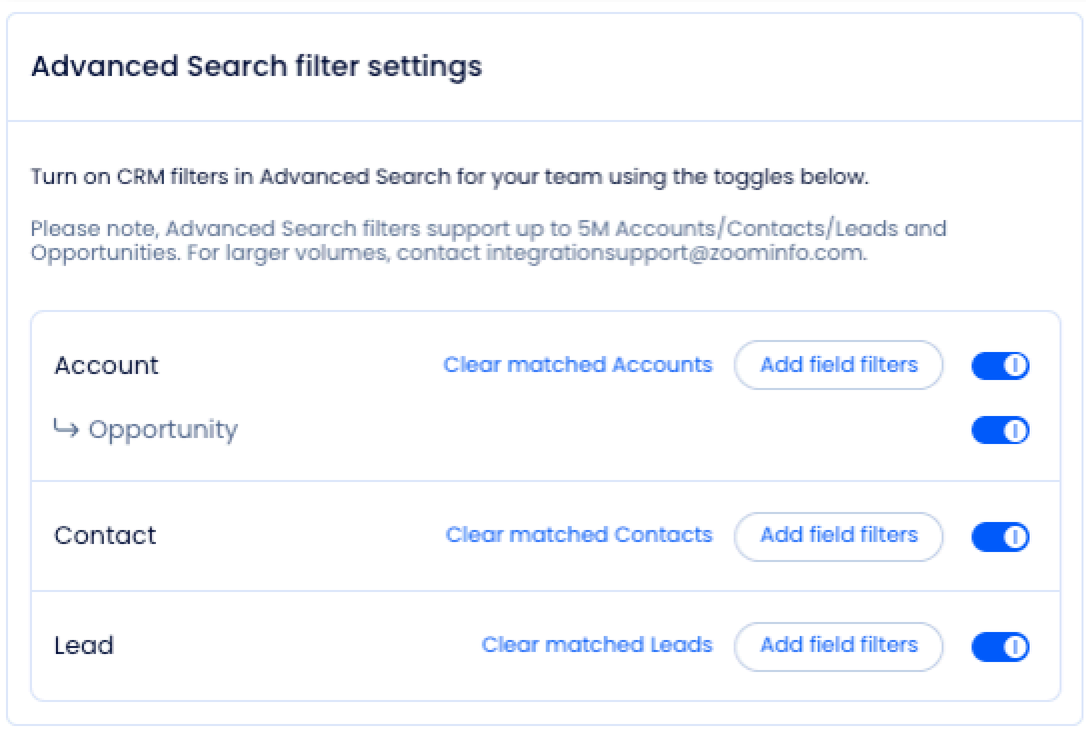


Import Rules

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 Salesforce Search Filters are presented to users.



User Experience

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

Key Considerations

Per object limits

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

Data updates daily

While Salesforce 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 Salesforce instance may include multiple or duplicate accounts across different locations. In this case, these records would be matched to a single ZoomInfo profile.

For exports under 25 records: To avoid creating duplicate records in Salesforce, ZoomInfo also checks for records synced through the Salesforce Filtering process (in case the ZoomInfo duplicate check fails to detect a match). This check applies to all contact, lead, and account export flows.

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

- Enables Copilot users to query against this data using Copilot AI Chat for timely and contextually-relevant responses.

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.

Account Deal Story (ZoomInfo Marketing)

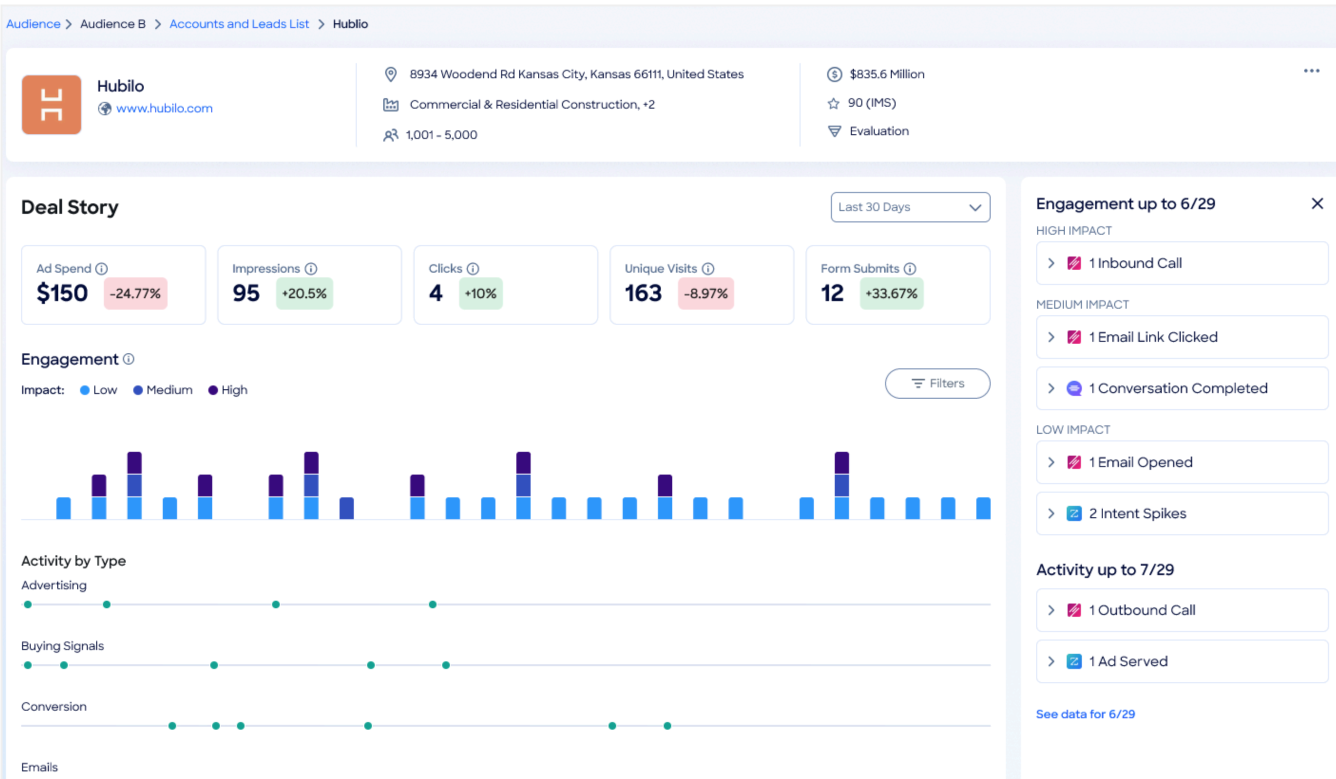
For organizations with ZoomInfo Marketing

The account Deal Story is a ZoomInfo Marketing feature that helps your users visualize how accounts are moving through the marketing funnel, where to prioritize effort and spend, and how ZoomInfo Marketing is delivering ROI. This feature requires Salesforce Import to be turned on, as highlighted in prior section.

Account Deal Story View

The **Deal Story** view for an account includes:

- A visual display of the engagements across all activities for that account.
- A visual display of all the activities performed for that account.
- Filters for engagement, activities and channels.
- Salesforce opportunity data for the account (see Include Salesforce Opportunity Data for details)



Include Salesforce Opportunity Data

Assuming you also want to also include Salesforce opportunity data in your Deal Story view, you'll need to ensure that a specific set of fields for the opportunity object have the appropriate permissions in Salesforce.

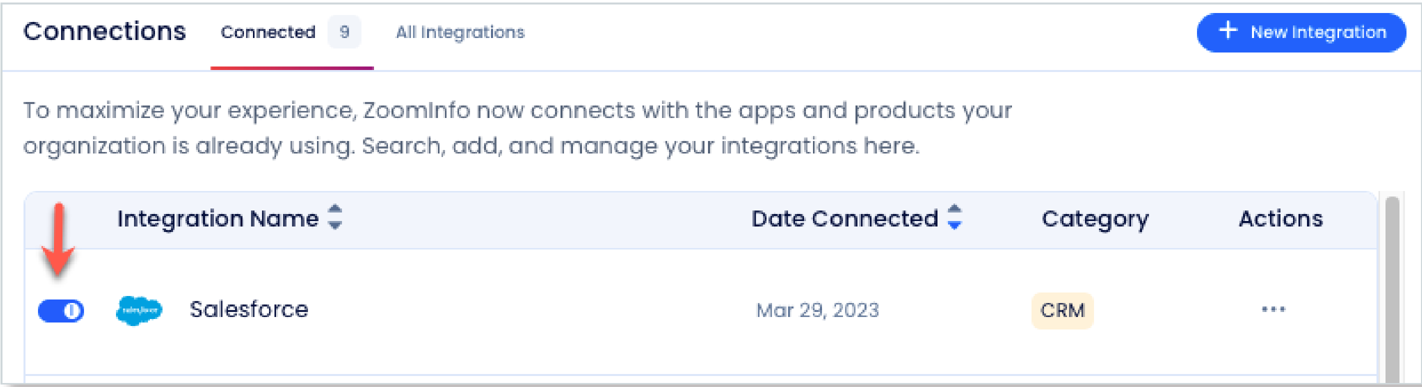
These steps must be performed by the admin user who connected the Salesforce integration from the ZoomInfo Admin Portal.

Do the following:

1. In Salesforce, navigate to **Setup > Object Manager > Opportunity** (or type in the search bar for quick access).
2. Click **Fields & Relationships** in Opportunity Object Manager.
3. Choose *one* of the following **Field Names** (type **Field Name** in the search bar for quick access).
    - Opportunity Name
    - Stage
    - Close Date
    - Amount
    - Contract
    - Opportunity Type (could also be Type)
4. Click **Set Field-Level Security** and select all checkboxes for **Visible**.
5. Click **Save**.
6. Repeat these steps for all **Field Names** listed above.
    - **Important**: Users must have access to the Opportunity object itself, and all of the fields you choose in this procedure.
    - Once configured, the opportunity data will appear in the account Deal Story view within 24 hours. If the data does not appear after this timeframe, disconnect and reconnect your Salesforce integration in the ZoomInfo Admin Portal.
    - For additional guidance, check out this demo video.

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 Salesforce with their own credentials to be able to export.
  - Admins should share the following link with users for instructions on how to connect to Salesforce.

Managing the Integration

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

Changing the Primary Admin (Service Account Configuration)

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

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

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

Changing the Primary Admin (User Account Configuration)

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

1. Go to the **General Settings** page for the integration.
2. Ensure that the new admin has the same Salesforce permissions as the outgoing admin.
3. Click **Change User**.

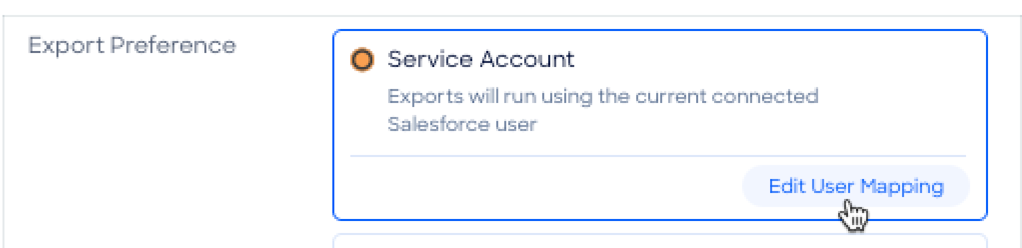
   Note: If Salesforce Filtering jobs are not configured, the secondary admin will not see the **Change User** option.
4. If the secondary admin is:
   - Already logged in to Salesforce in another browser or tab, the account is simply switched.
   - Not logged in to Salesforce, they'll need to authenticate using their credentials.

Switching from User Account Option to Service Account Option

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

1. Go to **Admin Portal > Integrations > Connections**.
2. On the **Connected** tab, temporarily turn off the integration for your organization using the toggle.
3. Go to the **General Settings** page for the integration.
4. In the **Export Preference** section, select the **Service Account** option.
5. Click **Save Changes**.

   Note: Saving the changes will enable the **Edit User Mapping** link.
6. Verify the user mapping configuration to ensure your org's users are mapped to Salesforce users by clicking **Edit User Mapping**.

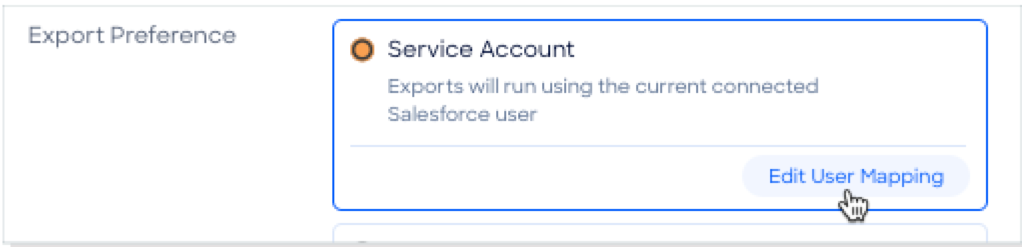


Tip: See the details about user mapping in the [Get Connected] procedure.

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 Salesforce 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.

Duplicate Checking Logic

When a user exports records from ZoomInfo to Salesforce, duplicate checking logic is applied to detect duplicate records within Salesforce. You have two choices:

- **Option 1**: You can use **standard duplicate-checking logic** used by ZoomInfo when exporting accounts, contacts, and leads.
- **Option 2**: You can use **custom duplicate rules configured in Salesforce** to flag duplicates when exporting accounts, contacts, and leads.
    - When enabled, the Salesforce custom duplicate rules fully replace the duplicate-checking logic used by ZoomInfo.
    - You can configure this feature per object (accounts, contacts, and leads).

Each option is described in the following sections:

- Option 1: Standard ZoomInfo Duplicate Checking
- Option 2: Custom Duplicate Checking

Option 1: Standard ZoomInfo Duplicate Checking

You 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 you, or select other available options.

User Options During Export

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

Required Permissions

As described earlier in Permissions, read/write permissions are required on the Salesforce fields for accounts, contacts and leads in order for ZoomInfo to query and identify duplicates.

Duplicate Logic

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

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

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

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

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

Contacts (people associated with a company):

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

Leads (people not associated with a company):

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

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

Option 2: Custom Duplicate Checking

See Salesforce Custom Duplicate Check in the ZoomInfo Knowledge Center for details on setting up this option.

Required Permissions

As described earlier in Permissions, Author Apex permissions are required. If users have the Author Apex permission, they can access all Apex classes in the associated organization, regardless of the security settings for individual classes.

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

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

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

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.