

Salesforce Native Application Implementation Guide

For administrators setting up the ZoomInfo Salesforce Native Application

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For sales and marketing teams who live in Salesforce, ZoomInfo's Native Application provides access to account, contact, and buyer intelligence. Search, upload, compare, and update critical prospecting data with our intuitive interface. Gain all of the benefits of ZoomInfo without ever leaving Salesforce.

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.

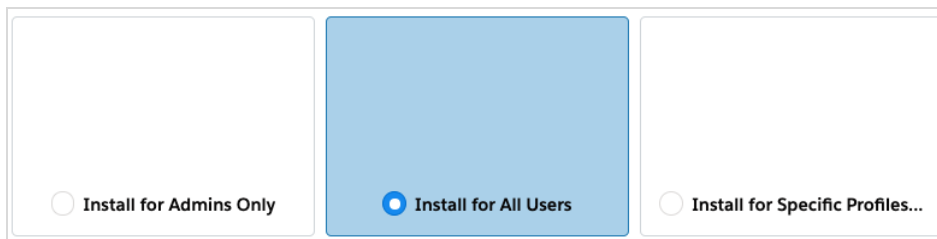
Installing the ZoomInfo Salesforce Native App

To install the Native App:

1. Go to the Salesforce AppExchange (<https://appexchange.salesforce.com/>) and search for 'ZoomInfo'.
2. Click the **ZoomInfo - GTM Intelligence Platform** tile.
3. Click **Get It Now** to install the package.
4. Choose whether to install the app in your production org, or in a sandbox org where you can perform any testing required by your organization.

Note: If you choose to test the package in your sandbox org and have satisfied your organization's testing requirements, you can repeat this process to install the package in your production org.

5. Select the **Install for All Users** option. The download typically takes 3-5 minutes.



Customizing Your Native App Experience

To provide users with inline access to ZoomInfo data when viewing leads, contacts, and accounts, you can integrate ZoomInfo data using one of the following methods:

- **Lightning Experience:** Add ZoomInfo Lightning components or Visualforce pages to your Salesforce Lightning record pages
- **Classic Mode:** Add ZoomInfo Visualforce objects to your Salesforce page layouts

Lightning Experience

If using the Salesforce Lightning Experience, you can add ZoomInfo data to your Salesforce lead, contact, and account pages using one of the following methods:

1. [Add Lightning Components to Lightning Record Pages](#)
2. [Add Visualforce Objects to Lightning Record Pages](#)

For the best user experience, ZoomInfo recommends using the first method, [Add Lightning Components to Lightning Record Pages](#).

Add the ZoomInfo Lightning Component to Lightning Record Pages

The Native App provides a Lightning Component for lead, contact and account pages in Salesforce. In addition to the Lightning Component, the app creates a field called ZoomInfo ID which will track ZoomInfo unique identifiers for contacts and companies.

1. Within **Salesforce Setup**, search for **Object Manager**.
2. Click **Object Manager**.
3. Select **Lead**.
4. Select **Lightning Record Pages**.
5. Click the **Leads** label of the Lightning Record Page to which you want to add the ZoomInfo profile.
6. Click **Edit**.
7. Within the editor, click on the **Details** tab.
8. Click **Add Tab** in the right sidebar.
9. Click the new **Details** tab you just added and provide a Custom Label (e.g. *ZoomInfo Sales*) and click **Done**.
10. Click and drag the **ZoomInfo** Lightning Component available on the left-hand side under **Custom - Managed > ZoomInfo**, onto the page.
11. Save the record page.

Repeat these steps for other page layouts for leads, contacts, and accounts for which you want the ZoomInfo page to display.

Add the ZoomInfo Visualforce Page to Lightning Record Pages

The Native App provides a Visualforce page for lead, contact and account pages. In addition to the Visualforce page, the app creates a field called ZoomInfo ID which will track ZoomInfo unique identifiers for contacts and companies.

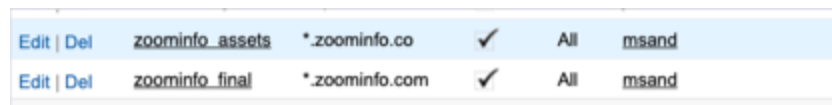
Note: For a better experience, the method described in [Add Lightning Components to Lightning Record Pages](#) is preferred.

1. Within **Salesforce Setup**, search for **Object Manager**.
2. Click **Object Manager**.
3. Select **Lead**.
4. Select **Lightning Record Pages**.
5. Click the **Leads** label of the Lightning Record Page to which you want to add the ZoomInfo profile.
6. Click **Edit**.
7. Within the editor, click on the **Details** tab.
8. Click **Add Tab** in the right sidebar.
9. Click the new **Details** tab you just added and provide a Custom Label (e.g. ZoomInfo Sales) and click **Done**.
10. Click and drag a new Visualforce component onto the page.
11. Select the **ZoomInfo Inline Visualforce** page.
12. Set the **Height** to 800 pixels.
13. Save the record page.

Repeat these steps for other page layouts for leads, contacts, and accounts for which you want the ZoomInfo page to display.

Note: If you experience a security issue with the ZoomInfo Visualforce page, add the following domains as [trusted domains in Salesforce](#):

- *.zoominfo.co
- *.zoominfo.com



Edit Del	zoominfo_assets	*.zoominfo.co	✓	All	msand
Edit Del	zoominfo_final	*.zoominfo.com	✓	All	msand

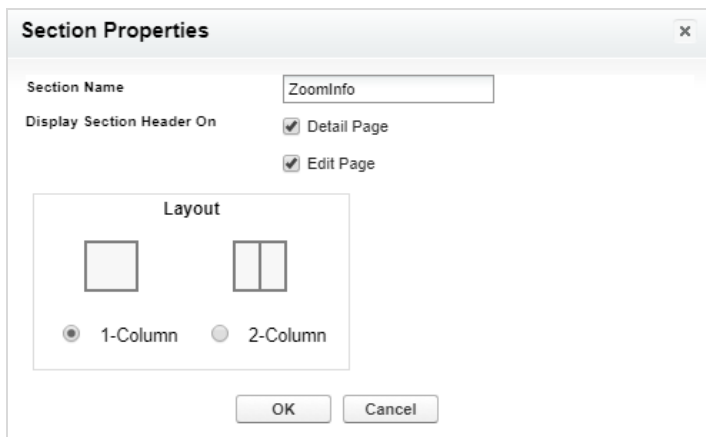
Classic Mode

If using Salesforce Classic Mode, you can add a ZoomInfo Visualforce page to your Salesforce lead, contact, and account pages.

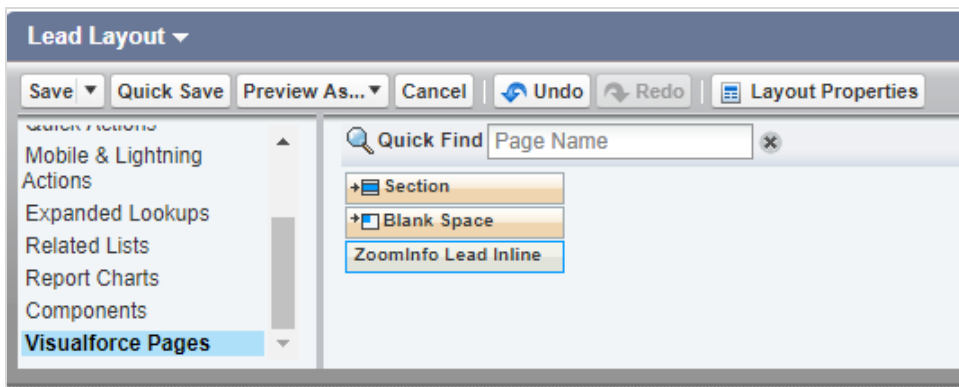
Add the ZoomInfo Visualforce Page to your Salesforce Page Layouts

The Native App provides a Visualforce page for lead, contact, and account pages. In addition to the Visualforce page, the Native App creates a field called ZoomInfo ID which will track ZoomInfo unique identifiers for contacts and companies.

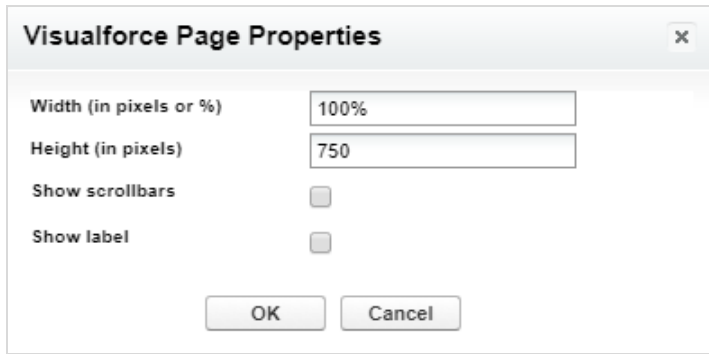
1. Within **Salesforce Setup**, search for **Page Layouts**.
2. Select **Page Layouts** under leads, contacts or accounts.
3. Select **Edit** beside the page layout to which you want to add the Visualforce page.
4. Click and drag a new **Section** onto the page layout. This section will be dedicated to the ZoomInfo application.
5. Name the section *ZoomInfo* and select **1-Column** as the layout.



6. Select **Visualforce Pages** from the main navigation header.
7. Click and drag the **ZoomInfo** Visualforce page (*ZoomInfo Lead Inline* in this example) into the section.



8. Double-click the Visualforce page or select the properties wrench in the top right corner. Adjust the height of the page to 750 pixels.



9. Save the page layout.

Repeat these steps for other page layouts for contacts, and accounts for which you want the ZoomInfo page to display.

Note: If you experience a security issue with the ZoomInfo Visualforce page, add the following domains as [trusted domains in Salesforce](#):

- *.zoominfo.co
- *.zoominfo.com

Edit Del	zoominfo_assets	*.zoominfo.co	✓	All	msand
Edit Del	zoominfo_final	*.zoominfo.com	✓	All	msand

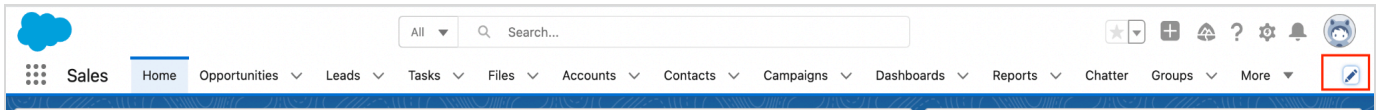
Add the ZoomInfo Lightning Tab to the Sales App Navigation Bar

If your organization is using the Lightning Experience, you can add the ZoomInfo Lightning tab to your Sales App navigation bar for easy access. The package includes two ZoomInfo items:

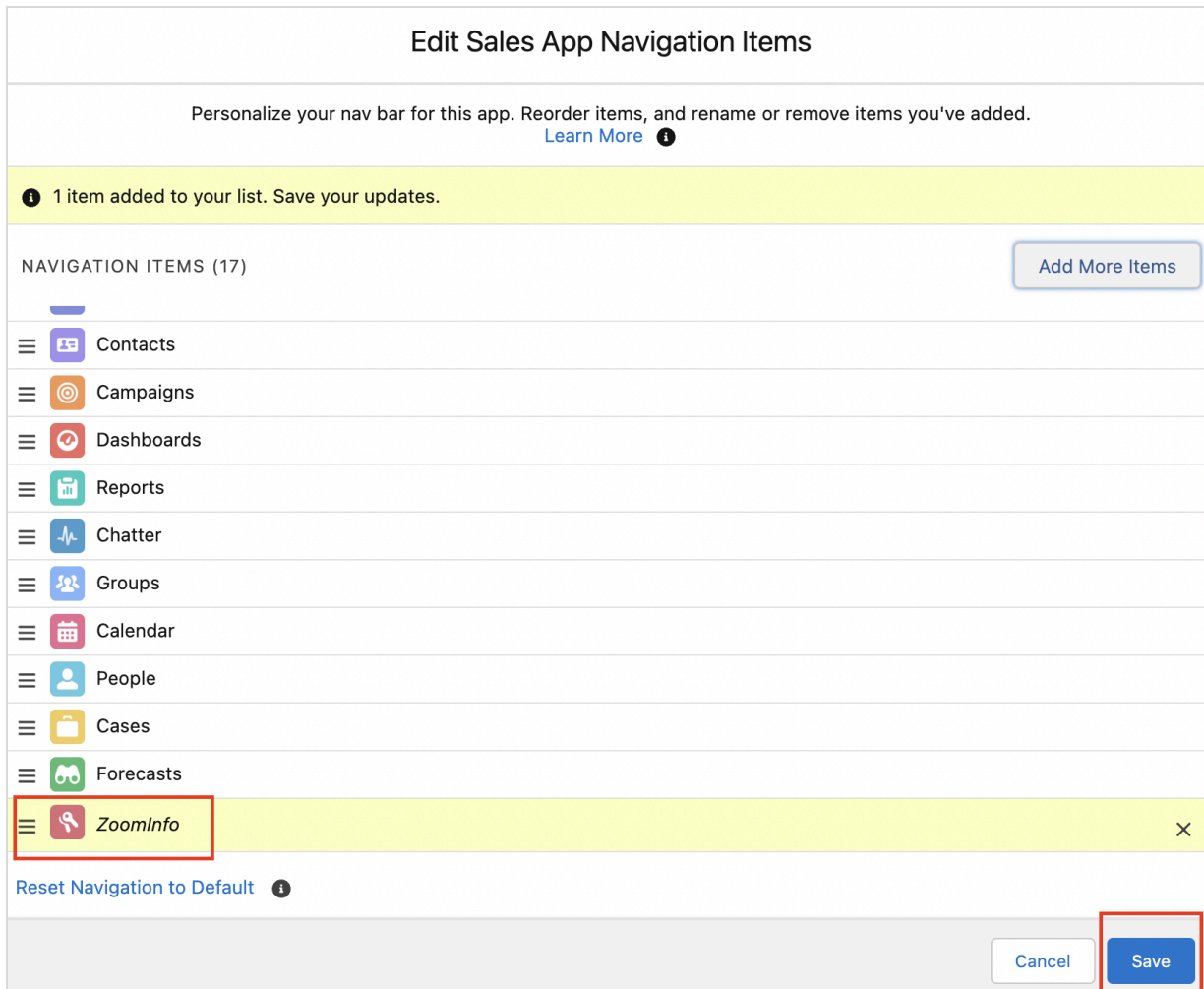
- **ZoomInfo** - For organizations using the method described in [Add Lightning Components to Lightning Record Pages](#).
- **ZoomInfo (VF)** - For organizations using the method described in [Add Visualforce Page to Lightning Record Pages](#).

To add the item to your Sales App navigation:

1. Launch your Sales App and click the pencil icon on the navigation bar.



2. Click **Add More Items**.
3. Search for "ZoomInfo". You should see the following options:
 - ZoomInfo
 - ZoomInfo (VF)
4. Set the appropriate item for your environment and add it.



5. Adjust the order of your navigation items as needed.
6. Click **Save**.

Edit ZoomInfo Tab Access for Users

You can optionally control which Salesforce users can see the ZoomInfo tab by adjusting their profiles.

1. Navigate to **Setup** within Salesforce.
2. Click **Manage Users > Profiles**.
3. Click **Edit** next to each profile from which you want to hide the ZoomInfo tab.
4. Within the profile settings, scroll down to the **Tab Settings** section.
5. Under the **Custom Tab Settings** header, you will find the **ZoomInfo** tab.
6. Using the dropdown menu next to the tab, set the tab to **Tab Hidden**.
7. Click **Save**. Repeat these steps for the other profiles from which you want to hide the tab.

Configuring Integration Settings

Authentication Setup

The authentication setup process varies depending on your app version. Follow the appropriate section below based on your installed version.

Authentication Setup (v1.50)

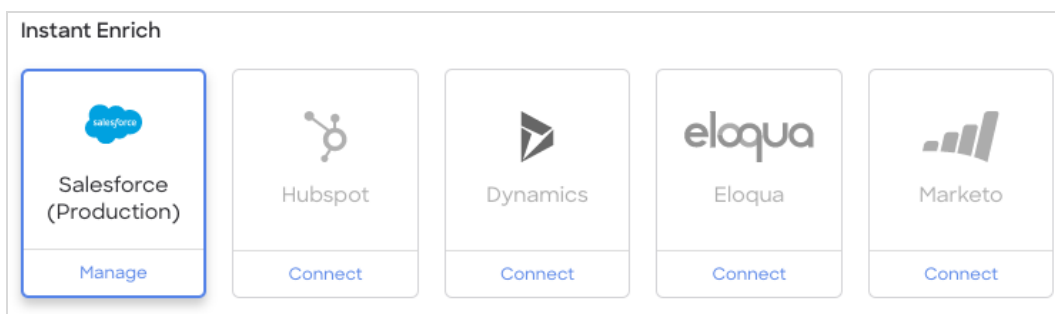
Configure ZoomInfo Authentication Credentials

Starting with version 1.50, ZoomInfo uses a secure custom object to store authentication credentials for **Instant Enrich** functionality, providing enhanced security through proper permission controls.

Note: This authentication setup is specifically required for Instant Enrich features. If your organization does not have an Enrich subscription, you can skip this section.

Step 1: Retrieve Credentials

1. Log into your ZoomInfo Admin Portal
2. Navigate to **Admin Portal > Integrations > Salesforce Settings**
3. Copy your **Username** and **JWT Token** (private key)



Step 2: Configure Authentication Object

1. In Salesforce, go to **Setup**
2. Navigate to **Object Manager**
3. Search for and select **ZoomInfo Enrich Private Key**
4. (Note: This is where administrators can review object access and define permissions)
5. When ready to configure credentials:
 - Click the **App Launcher** (9-dot grid icon)
 - Search for "**ZoomInfo Enrich Private Key**"
 - Select the "**Enrich Private Key**" item
 - Edit the existing record (do not create a new record)
6. In the edit form:
 - **Username:** Paste the username from Step 1
 - **Private Key:** Paste the JWT token from Step 1
 - **⚠ Important:** Do NOT modify any pre-filled fields - this will cause authentication failures
7. Click **Save**

Step 3: Assign Permission Sets

1. In Salesforce Setup, navigate to **Users > Permission Sets**
2. For administrators managing authentication settings, also assign **ZoomInfo Admin Access**
3. Select **ZoomInfo Limited Access**
4. Click **Manage Assignments**
5. Choose your assignment method:
 - **Individual Users:** Click **Add Assignments** and select specific users
 - **Bulk Assignment:** Select multiple users and assign simultaneously
 - **Permission Set Groups:** Create/use groups for easier management

Step 4: Verification

Test Enrich functionality on a sample Account, Contact, or Lead record to confirm setup is successful.

Authentication Setup (v1.51+)

Configure Certificate-Based Authentication

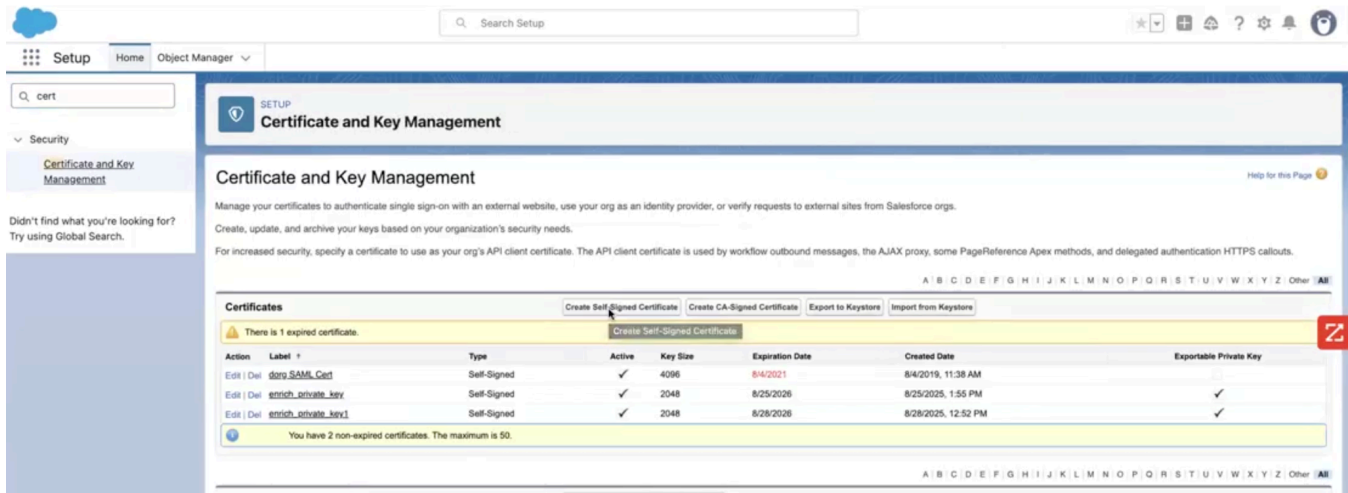
Starting with version 1.51, ZoomInfo uses Salesforce Named Credentials with certificate-based authentication for enhanced security. This method prevents unauthorized access by restricting credential access to administrators with proper permissions.

Note: This authentication setup is specifically required for Instant Enrich features. If your organization does not have an Enrich subscription, you can skip this section.

Step 1: Create Self-Signed Certificate in Salesforce

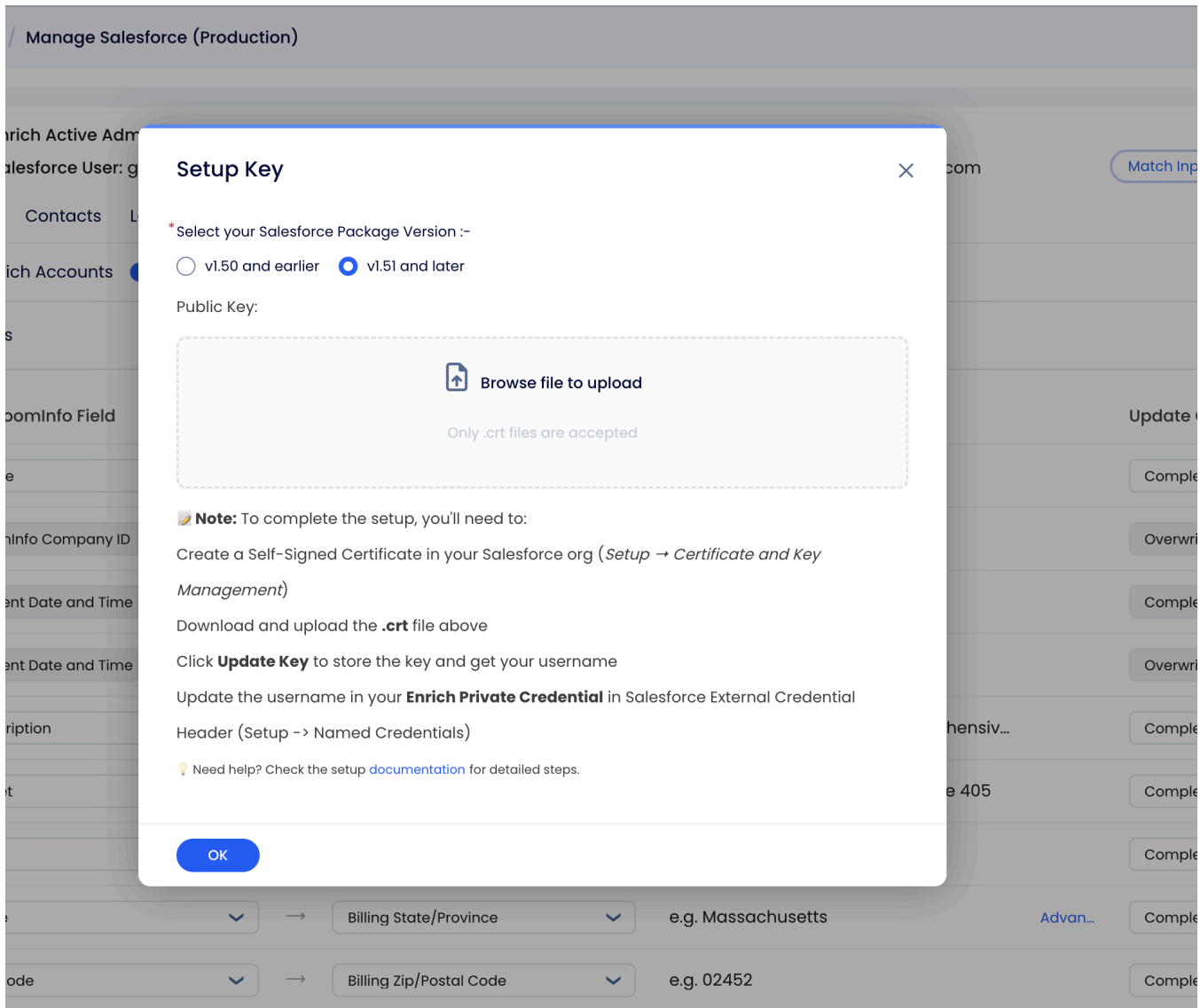
1. In Salesforce Setup, search for **Certificate and Key Management**
2. Click **Create Self-Signed Certificate**
3. Enter a descriptive label (e.g., "ZoomInfo Enrich Certificate")

4. Complete any additional fields as needed for your organization
5. Click **Save**
6. Locate your newly created certificate in the list
7. Click **Download Certificate** to download the public key file
 - Save this file - you'll upload it to ZoomInfo in the next step



Step 2: Upload Certificate to ZoomInfo Admin Portal

1. Log into your ZoomInfo Admin Portal
2. Navigate to **Integrations > Data Enrichment**
3. Locate the Salesforce connection
4. Click **Upload Certificate** (available in v1.51+)
5. Select the certificate file you downloaded in Step 1
6. After upload completes, **copy the username** displayed on screen
 - You'll need this username for Step 3



Step 3: Configure Named Credential and External Credential

The ZoomInfo app automatically creates the necessary Named Credential and External Credential objects during installation. You just need to configure them with your certificate and username.

Configure External Credential:

1. In Salesforce Setup, search for **Named Credentials**
2. Click **External Credentials** tab
3. Click the **ZoomInfo Enrich Private Key** and click **Edit**
4. Under **Authentication Protocol**, select the certificate you created in Step 1
5. Click **Save**

Edit Enrich Private Credential

* Label: Enrich Private Credential

* Name: Enrich_Private_Credential

* Authentication Protocol: JWT

Common Claims

Issuer (iss): https://www.zoominfo.com

Subject (sub): enrich@zoominfo.com

Audience (aud): enrich@zoominfo.com

JWT Expiration (Seconds): 3,600

JWT Signing

* Signing Certificate: Search Certificates...
enrich_related_certs
enrich_private_key1
enrich_private_key

* Signing Algorithm: RS256

Cancel Save

Configure Named Credential Claims:

1. While still in **External Credentials**, find **ZoomInfo Enrich Private Key**
2. Find **JWT Claims** and click **Edit**
3. Enter the **username** you copied from Step 2
4. Click **Save**

Edit JWT Claims

Claim

* Name: * Type:

Description:

Value:

Claim Delete

* Name: * Type:

Description:

* Value:

Cancel Save

Important: The certificate you created will expire after one year. When it expires, you'll need to create a new certificate and repeat this configuration process.

Step 4: Assign Permission Sets

All Salesforce users whose records need to be instantly enriched must have access to the "External/Named credential" on their profile, and the Enrich Limited Access permission set must be applied.

1. In Salesforce Setup, navigate to **Users > Permission Sets**
2. Select **ZoomInfo Limited Access**
3. Click **Manage Assignments**
4. Assign to users who need Enrich functionality
5. For administrators managing authentication settings, also assign **ZoomInfo Admin Access**

Step 5: Verification

Test Enrich functionality on a sample Account, Contact, or Lead record to confirm setup is successful.

Integrations Settings Configuration

You can configure your Salesforce integration settings, including export preferences, mapping, and filtering from the **Admin Portal** in either the ZoomInfo Sales platform or in Salesforce using the Native App.

Option 1: In the ZoomInfo Sales platform:

1. Go to **Admin Portal > Integrations**
2. On the **Connected** tab, find your Salesforce connection and click it.
3. Click **Edit settings**.

Option 2: In the Native App:

Go to **Admin Portal > Salesforce Settings**.

The configuration you make in either Admin Portal are applied to both the platform and the Native App. See the [Salesforce Integration Guide](#) for full details on connecting and configuring the integration for your organization.

Utilizing 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.

- **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 data fields available in the default mapping 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.

Scoops and Intent Custom Objects

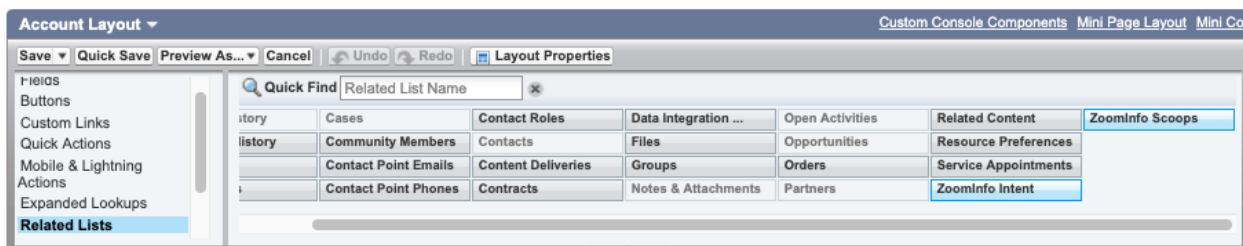
Each of these custom objects can be displayed on a related list for account, contact, and lead records, enabling users to easily explore the complete ZoomInfo data for that object.

Enabling export from ZoomInfo to these custom objects requires some admin configuration in both the ZoomInfo Admin Portal and Salesforce.

Salesforce Configuration

This example shows how to add Scoops and Intent data in the account record layout using the Classic Salesforce Experience. You would apply the same concepts in the Lightning Experience.

1. Go to an Account record.
2. Click Edit Layout.
3. Click Related Lists, select one or more ZoomInfo custom objects, and drag into the Related Lists section.



Optionally, customize the fields displayed in the record view. Each ZoomInfo custom object is initially configured to show only the Scoop or Intent name, but you can add other metadata fields to the view users will see by clicking the wrench icon.

ZoomInfo Admin Portal Configuration

Now that you have the custom objects displayed on the appropriate record types, you can enable the export in the ZoomInfo Admin Portal. This includes selecting the Scoops and Intent topics you want to capture.

See the [Salesforce Integration Guide](#) - "Configure Exports to Custom Objects" for details.

ZoomInfo Custom Object

You can utilize a custom object called "ZoomInfo" to capture all possible data fields available to you in default mapping 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.

Once you enable the ZoomInfo custom object, a Salesforce admin can modify account, contact, and lead pages to include a related list that houses the custom object, enabling users to easily explore the complete ZoomInfo data for that object.

Before configuring this feature, install or upgrade the ZoomInfo for Salesforce Native Application to **version 1.34 or higher** from the [Salesforce Appexchange](#).

From ZoomInfo Sales:

1. Go to **Admin Portal > Integrations** and click **Manage** in the Salesforce tile.
2. Click the **Mapping** tab.
3. Enable the **ZoomInfo Custom Object Export** toggle for the desired object types (Accounts, Contacts, Leads).

Current Date and Time	→	ZoomInfo First Updated (DOZISF__ZoomL)	e.g. 01/02/2020 12:00:00PM UTC
Current Date and Time	→	ZoomInfo Last Updated (DOZISF__ZoomL)	e.g. 01/02/2020 12:00:00PM UTC
First Name	→	First Name	e.g. Hila
Job Title	→	Title	e.g. Vice President of Marketing and Product
Company Street	→	Street	e.g. 307 Waverley Oaks Rd.

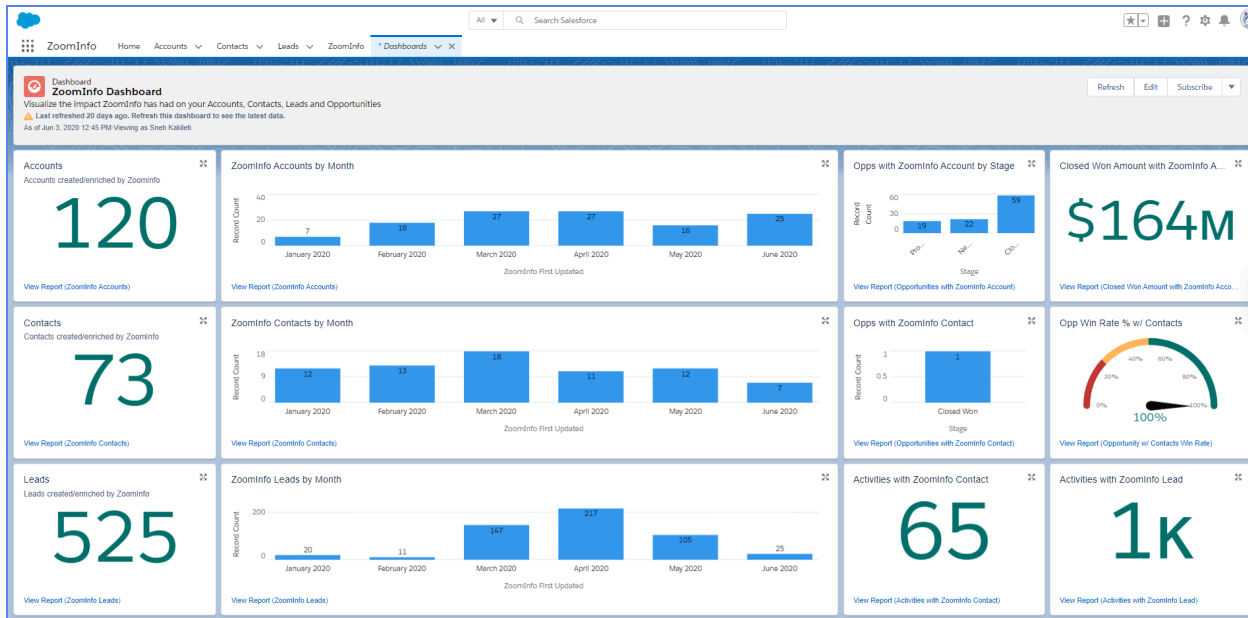
ZoomInfo Custom Object Export

Verify and Save

4. Ask your Salesforce admin to add the ZoomInfo custom object to a related list on corresponding account, contact, and lead pages in Salesforce.

ZoomInfo Dashboard

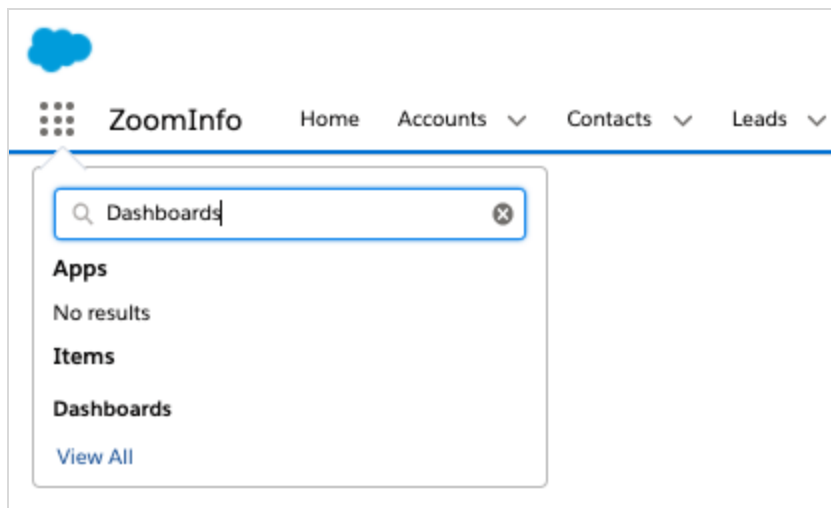
The ZoomInfo dashboard enables users to visualize the impact ZoomInfo has had on Accounts, Contacts, Leads and Opportunities.



Add the Dashboard

To add the ZoomInfo dashboard:

1. Click the App Launcher and search for **Dashboards**.



2. Filter to find **ZoomInfo Dashboard**.
3. Click **ZoomInfo Dashboard** to add it to your view.

Edit Dashboard Settings

The ZoomInfo Dashboard is a Salesforce Dynamic Dashboard. By default, the dashboard data reflects the individual Salesforce user. However, the user can [edit the dashboard settings](#) to specify who they view the dashboard as along with other custom display settings.

Properties

*Name

ZoomInfo Dashboard

Description

Visualize the impact ZoomInfo has had on your Accounts, Contacts, Leads a

Folder

ZoomInfo Dashboards

Select Folder

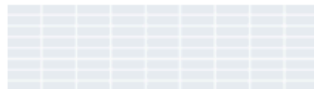
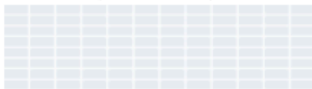
View Dashboard As

- Me
- Another person
- The dashboard viewer
- Let dashboard viewers choose whom they view the dashboard as

Dashboard Grid Size 

12 columns (recommended)

9 columns



Dashboard Theme 

Light

Dark

