Chorus Integrations Guide

For administrators setting up Chorus integrations

Integrate with Supported CRMs	**2**
Salesforce Integration	2
HubSpot Integration	22
Microsoft Dynamics Integration	23
Create Tasks for Unrecorded Meetings (Salesforce, HubSpot, and Dynamics)	**25**
Delete Non-compliant Dialer Calls	**25**
Account Matching	**26**
Cloud Storage for Recordings (Custom Media Bucket)	**27**
Integrate with Conferencing and Work Productivity Tools	**27**
General Web Conferencing Integration	28
Native Zoom Integration	29
Clari Integration	32
Gainsight Integration	33
Zapier Integration	34
Slack Integration	36
Dialer Integration	40

This guide is a companion to the Chorus Implementation Guide that describes the overall implementation of Chorus for your organization. Use this guide to integrate with supported CRMs, web conferencing applications, and dialers.

Integrate with Supported CRMs

Chorus integrates directly with the following cloud-based CRM applications commonly used in many organizations:

- Salesforce
- HubSpot
- Microsoft Dynamics

Important: Chorus does not integrate with any on-prem version of these CRMs applications.

Salesforce Integration

This section describes how to integrate with Salesforce.

Before You Begin

You must have either Enterprise, Unlimited, or Developer's Edition of Salesforce and you must have Salesforce Admin rights to install and configure Chorus.

Perform Initial Connect and Sync

By syncing Chorus and Salesforce, Chorus will automatically sync any of your team's conversations with the appropriate Account, Opportunity and Contact in Salesforce. This will also allow you to sort calls in Chorus by any relevant Account or Opportunity data, including:

- Account Name
- Opportunity Name
- Opportunity Stage
- Opportunity Size
- Close Date

Syncing will also automatically push a completed Salesforce task containing a link to a call as well as a list of attendees, topics discussed, and next steps.

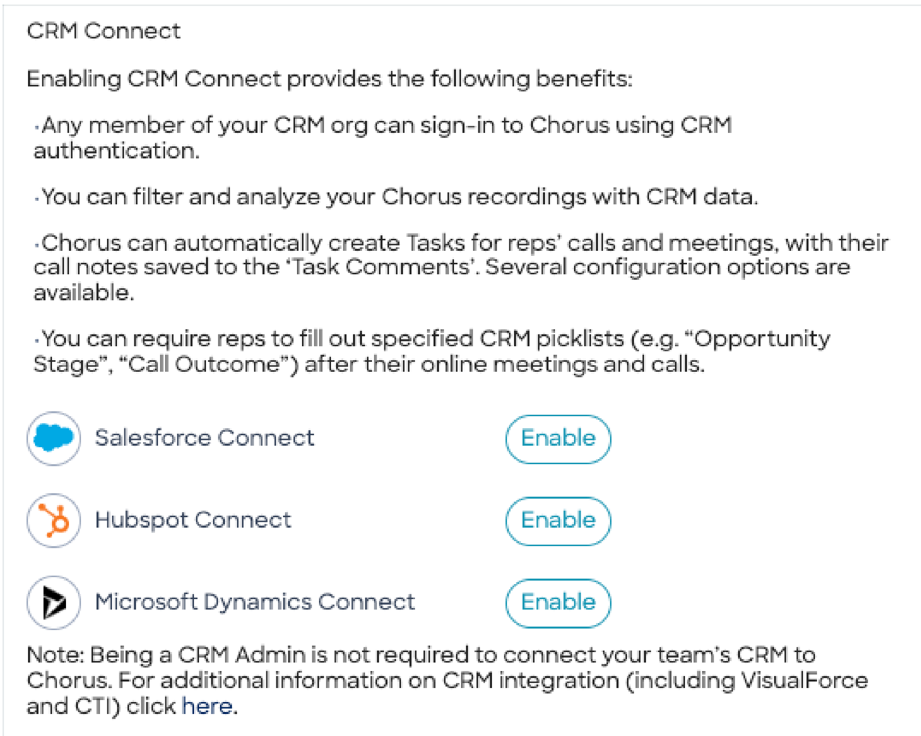
To connect and sync:

1. Log in to Chorus as an admin.

   Note: We recommend having a member of your Ops team or a dedicated integration user connect your Chorus instance with Salesforce.

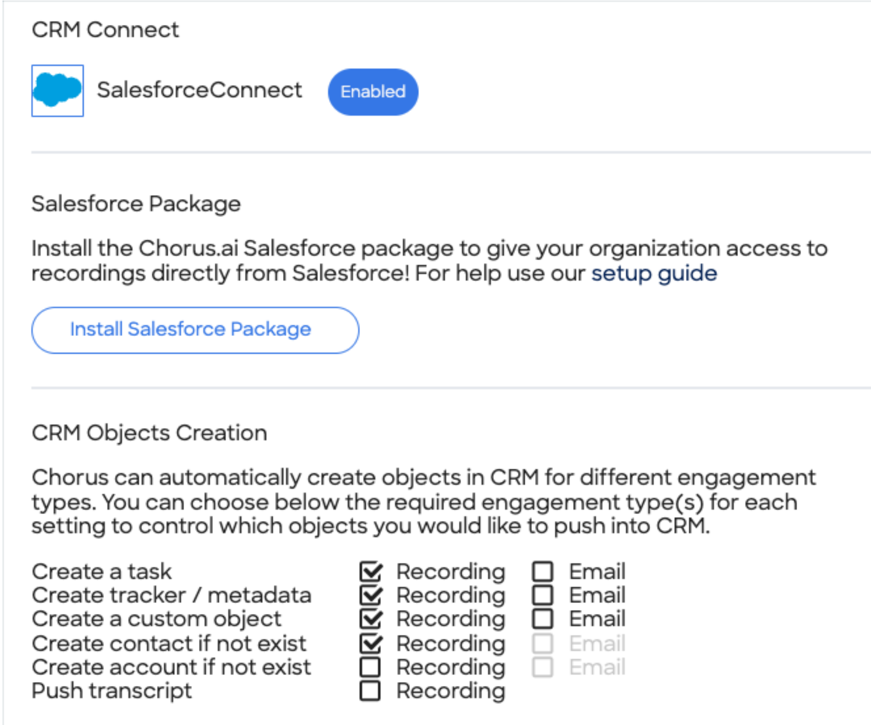
2. Go to **Chorus Settings > Integrations**.

3. Click **Enable** next to **SalesforceConnect**.



4. Log in to Salesforce using your credentials.

5. Once you're connected, you can use the **CRM Objects Creation** section to configure how Chorus automatically creates objects in your CRM for different engagement types.

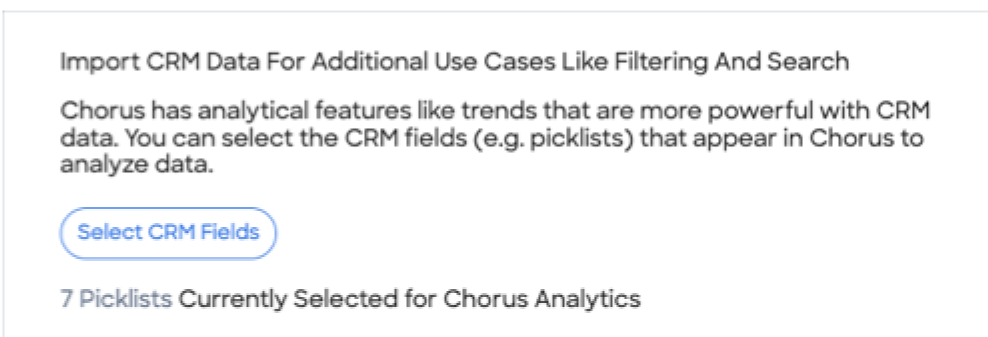


Import Salesforce Fields to Filter Calls in Chorus

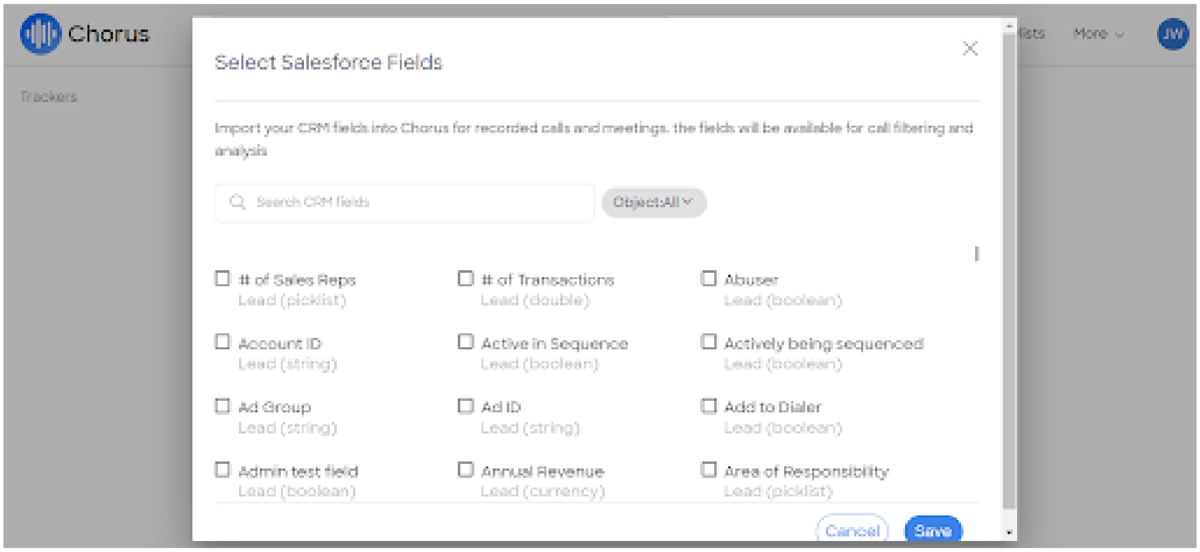
Once you've synced Salesforce with Chorus, you can map to custom fields you have on standard objects in Salesforce (Task, Lead, Account, Opportunity), allowing you to filter calls by Opportunities or Accounts.

1. In Chorus, go to **Settings > Integration Settings** and scroll to the **Import CRM Data for Additional Use Cases Like Filtering and Search** section.

2. Click **Select CRM Fields**.

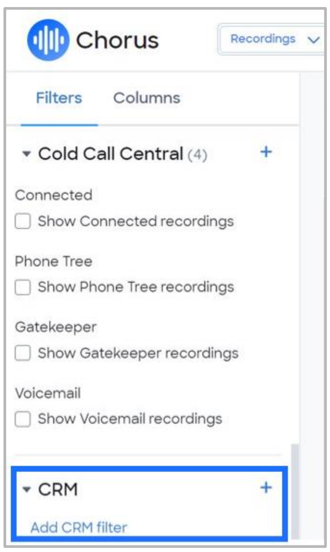


3. Select the Salesforce fields you want to import to add as filters for calls, deals and analytics.



4. Click **Save**.

   On the Recordings, Deals, or Analytics pages, your users will see the new filters under **Custom CRM Filters**. This will enable your users to filter calls by the fields you've enabled.



Push Call Activity to Salesforce (Automatic Task or Event Creation)

Once Salesforce is synced with Chorus, Chorus will automatically log your team's activity from their scheduled screen share meetings in Salesforce. The sync includes information about call participants, meeting subject, meeting date, next steps and other tracked topics found in the transcript.

Here's an example of a pushed task in Salesforce:

Comments
RECORDING:
https://chorus.ai/meeting/3810048?call=CD2590C3E9CE4885ADE9C6D213C44870123

ATTENDEES:
Michael Scott, Regional Manager
Dwight Schrute, Assistant to the Regional Manager
Todd Packer, Field Sales
Fake Acme Employee, Account Executive

KEY TOPICS DISCUSSED:
Impact, Competitor 1, Pain, Budget, Need, Metrics, Background, Use Case, Timing, Authority

NEXT STEPS (TRANSCRIPT):
* Sure, I'll send you the invite for Friday at 3pm. Anything else I could answer for you?
* There's a bunch of other security documentation as well, I'll shoot them over after the call
* Great question, let me ask my solutions engineer and i'll get back to you

About Pushed Tasks

The default task type for Chorus tasks is **Call**. However, this can be modified using Process Builder in Salesforce.

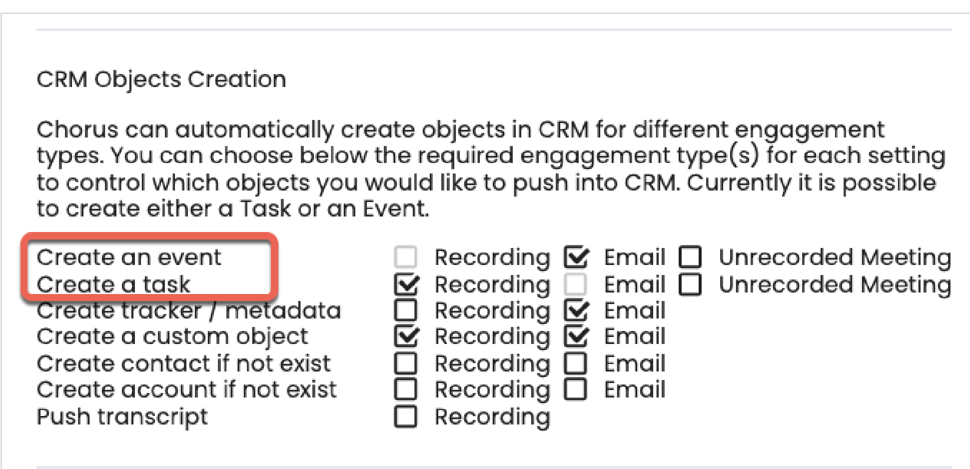
The Pushed Tasks feature is on by default, but can be turned off if necessary by a Chorus admin using the following steps:

1. Click on **your initials** in the bottom left corner of the navigation bar.
2. Select **Settings**, then navigate to the **Integrations** page.

Create Task or Event for CRM Object Creation in Salesforce

Admins using Salesforce, can choose either Task, or Event when writing from Chorus.

1. In Chorus click **Settings > Integrations**.
2. Scroll to **CRM Objects Creation**.
3. Select **Create an event**, or **Create a task**.



Note: Events created this way will appear in your Salesforce calendar.

Pushed Tasks Naming Convention

All tasks pushed into Salesforce from Chorus have a naming convention that begins with "Chorus -" and ends with the name of the scheduled meeting (e.g., *Chorus - Wonka and Schrute Farms Connect*).

If a meeting is unscheduled and doesn't have a title, it will be entitled, *Chorus - Unscheduled Meeting*.

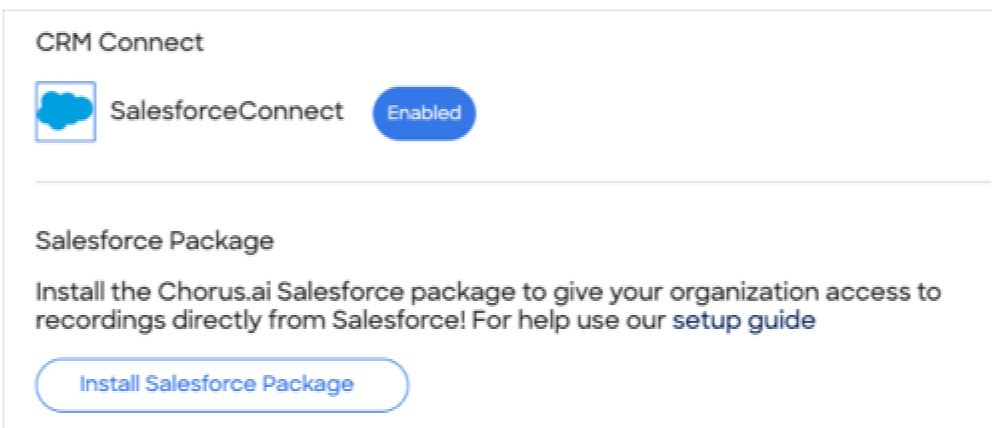
Install the Chorus for Salesforce Managed Package

Once Salesforce has been synced, you can install the managed package Chorus to make Chorus data accessible to your team from within the Salesforce platform, enabling Chorus to provide relevant data in your existing Salesforce instance and Salesforce dashboards. This includes:

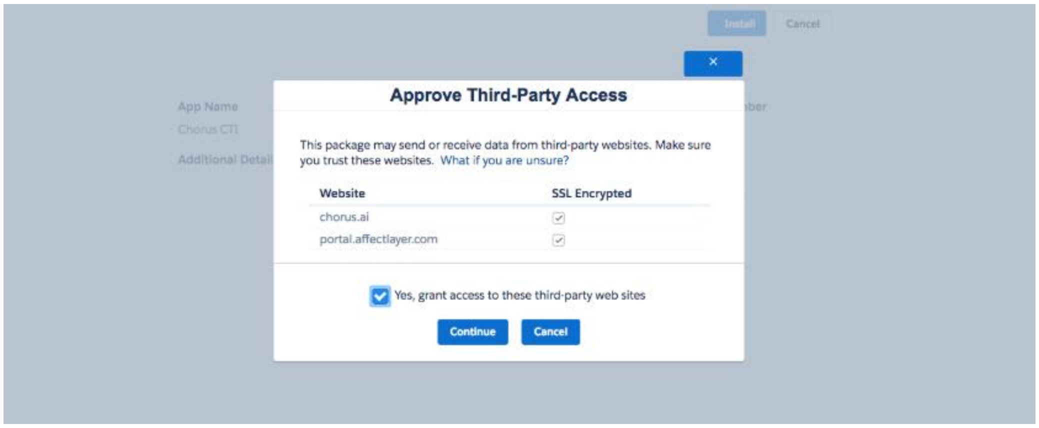
- Access to call recordings processed through Chorus within the Salesforce platform where users can review call information in context with CRM data.
- The ability to sync Chorus Trackers to Salesforce to support custom reporting.

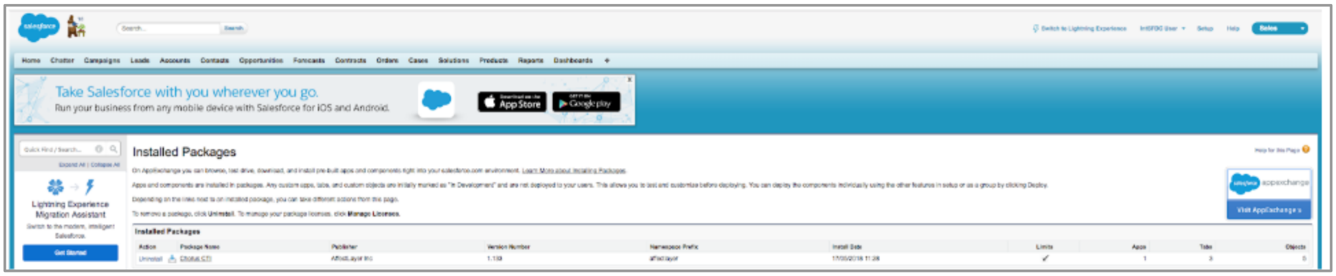
To install the Chorus Salesforce package:

1. Log in to Chorus and navigate to **Settings > Integration Settings**.
2. Click **Install Salesforce Package**.



3. Click **Install for All Users** and click **Install**.
4. Select **Yes, grant access to these third-party websites** and click **Continue**.
5. Click **Done** to complete the process.





Create Custom Objects for Chorus and Salesforce

Chorus custom objects for Salesforce unlock greater flexibility for reporting, data analysis and triggering workflows by connecting granular Chorus data directly with your Salesforce instance.

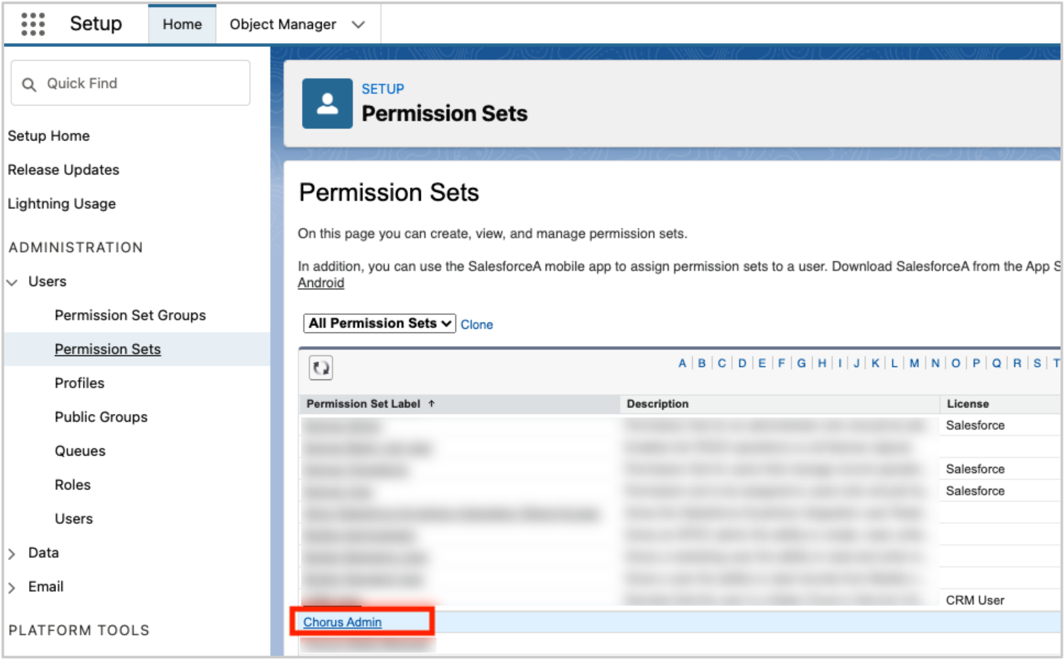
Before You Begin

In order to access Chorus custom objects in Salesforce, you must have successfully installed the Chorus for Salesforce managed package.

Assign Permission Sets for Chorus Custom Objects

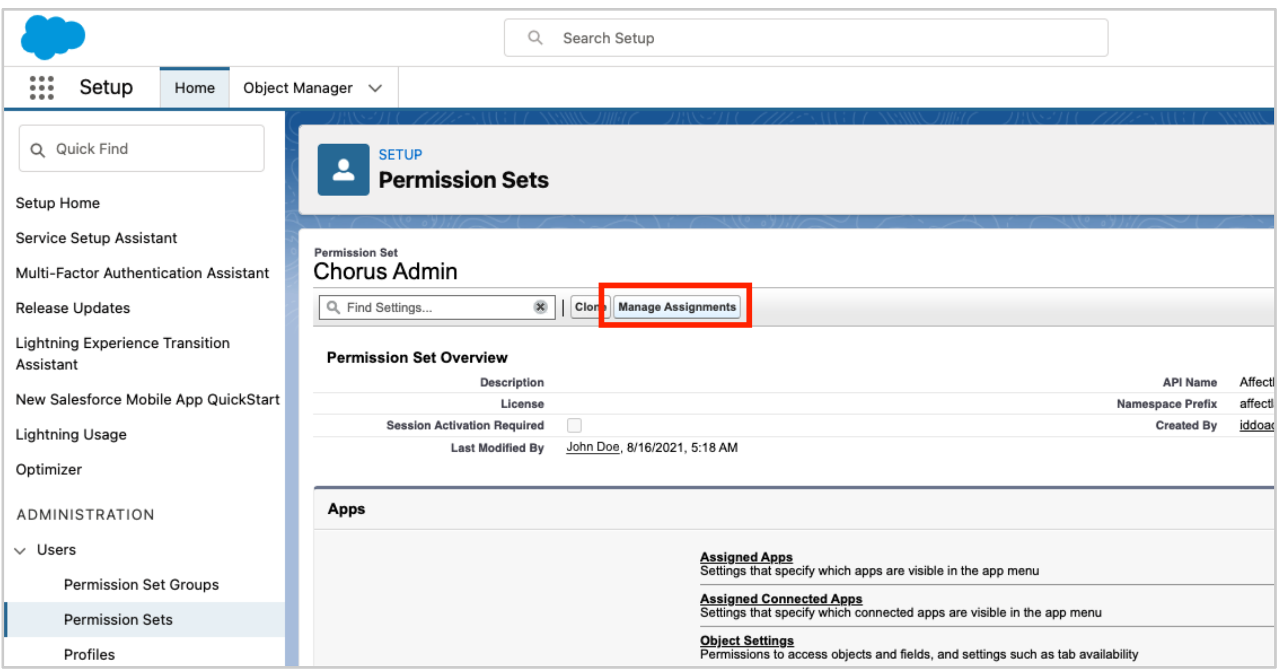
The managed package includes permission sets labeled **Chorus Admin**. You can assign the included permission sets to users who will need to view, create, and edit reports.

1. Go to **Setup > Users > Permission Sets** and select the **Chorus Admin** permission set.

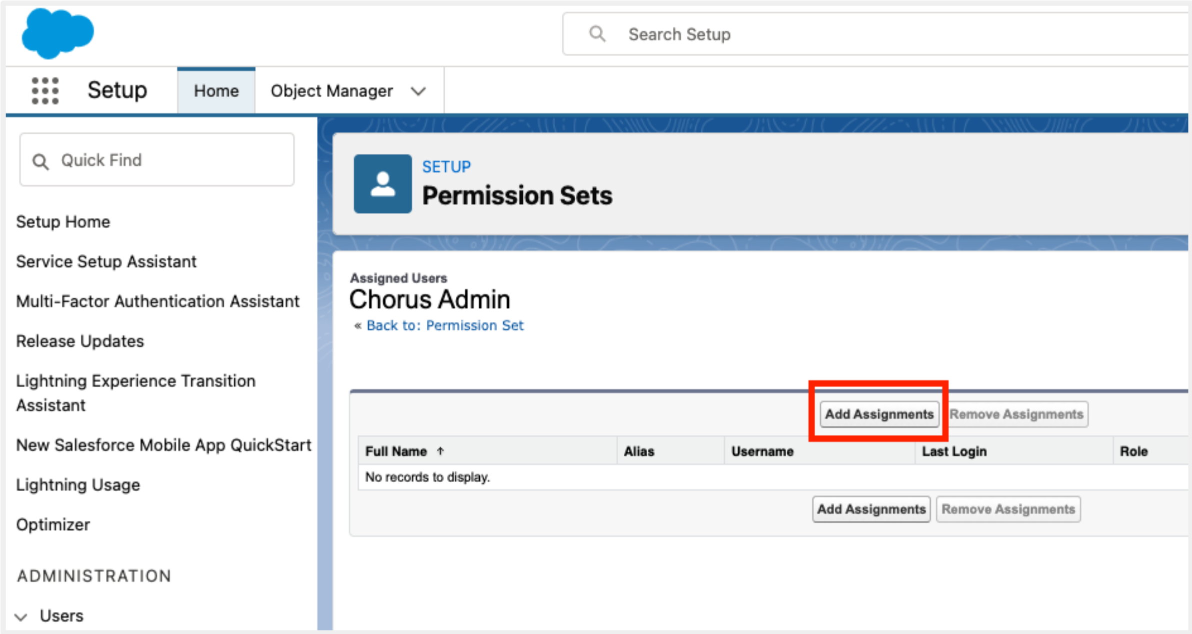


Note: This permission set will grant the selected users access to custom objects and fields in Salesforce.

2. Click **Manage Assignments**.



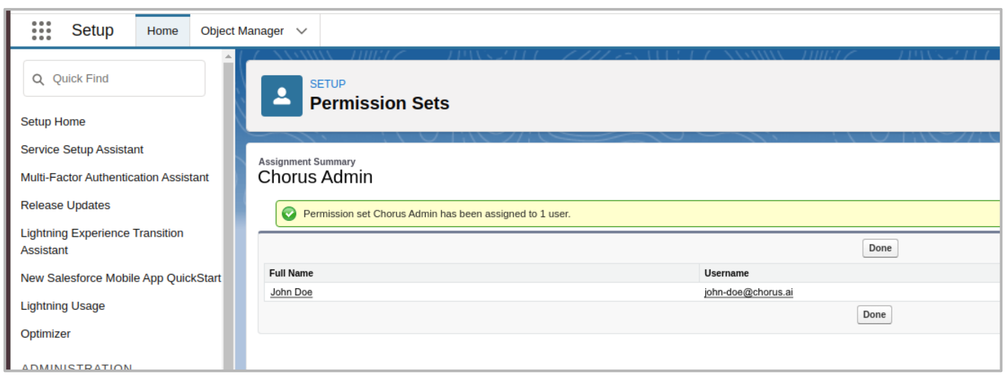
3. Click **Add Assignments**.



4. Select the users who need the permission set and click **Assign**.

   Note: At a minimum, include the Chorus-Salesforce integration user.

5. Click **Done**.



6. Validate that the users who need to access reports and Engagement/Moment objects have access to Apex Class "**ChorusSyncService**". Review this guide for more information on Apex Class Access.

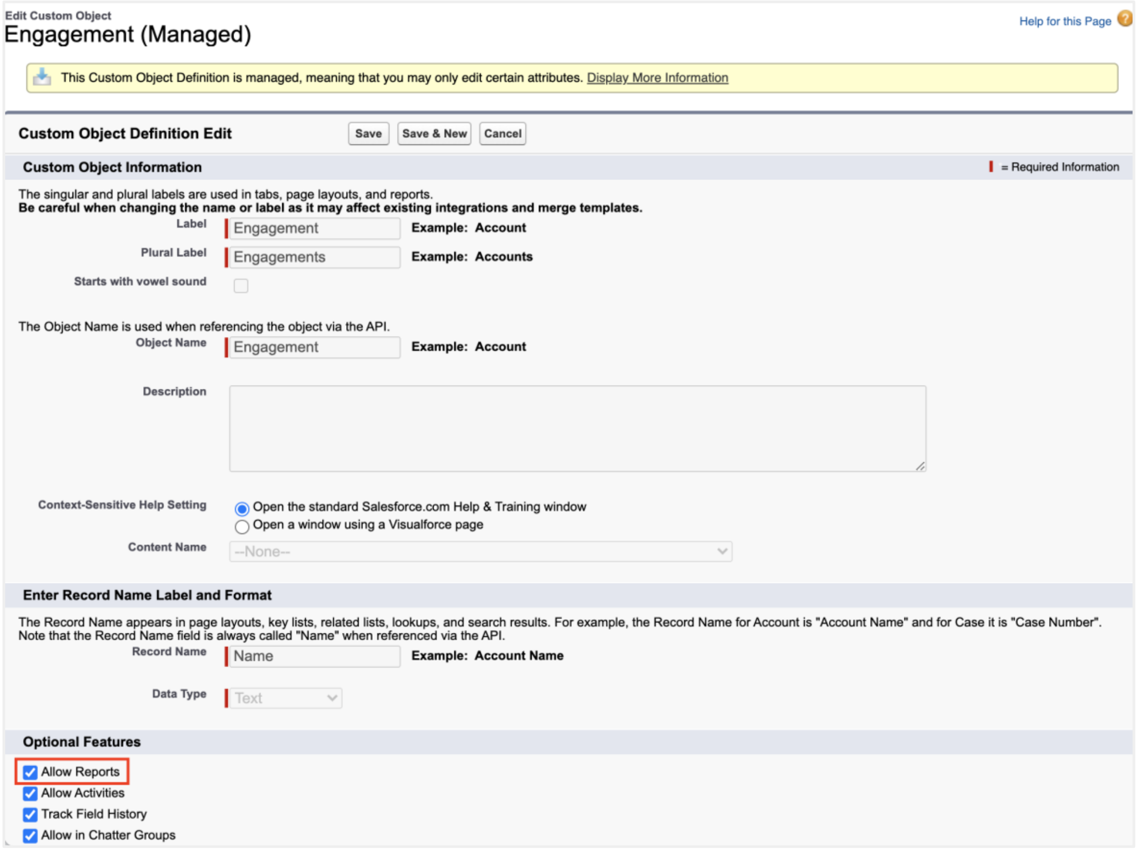
Connect Chorus Custom Objects to Salesforce Reports

You can add Chorus custom objects to your Salesforce reports with the following steps:

1. Go to **Salesforce Setup > Object Manager** and confirm that you see the **Engagement** object.

2. Click **Edit**.

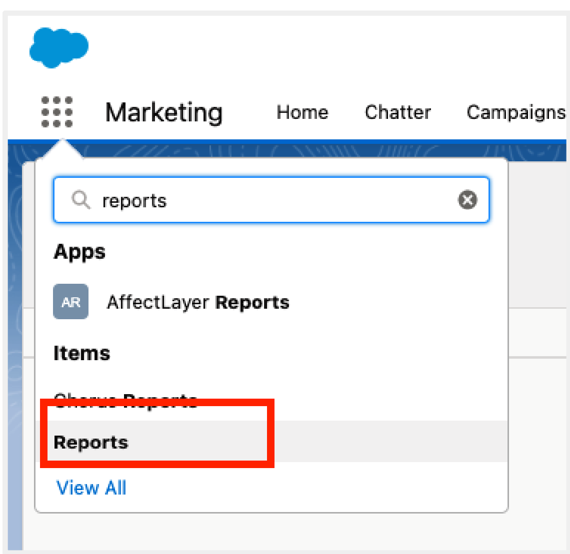
3. Scroll to **Optional Features**, check **Allow Reports** then click **Save**.



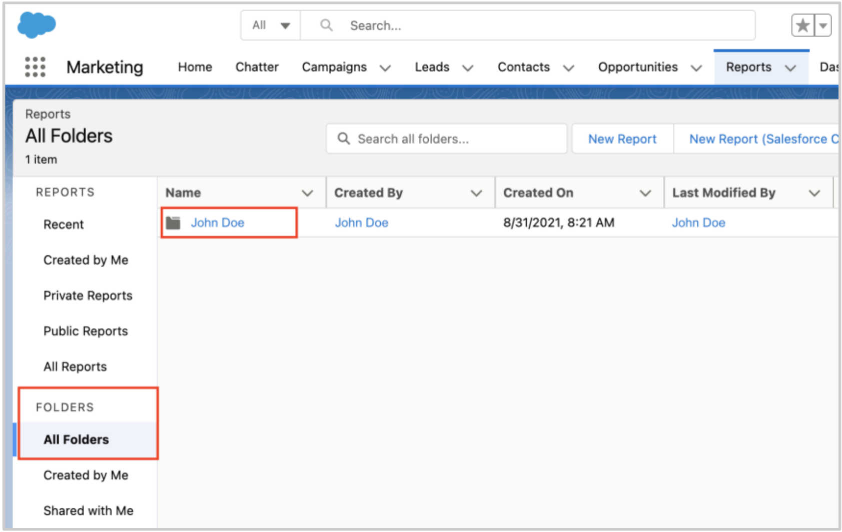
4. Repeat these steps for the **Moment** object.

Access Chorus Pre-Built Reports

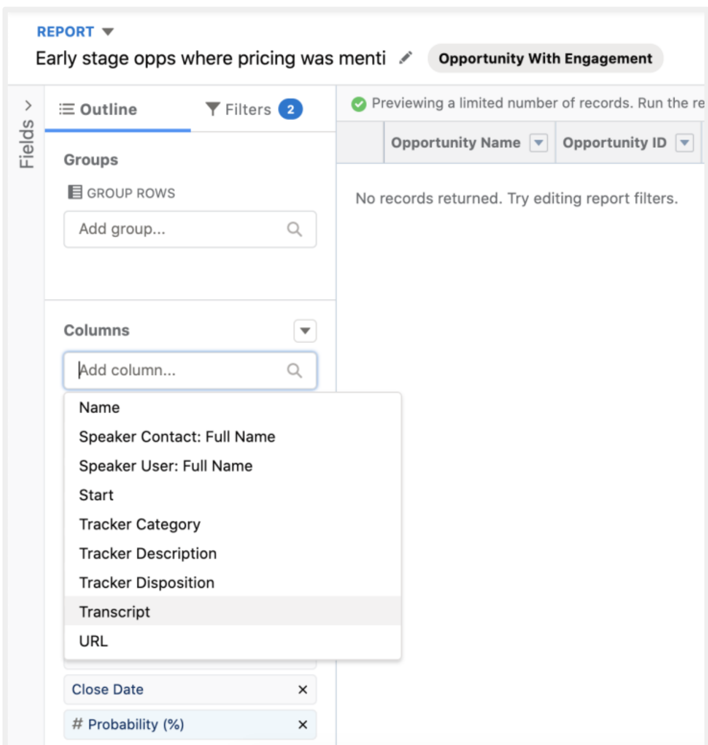
1. In Salesforce navigate click the **App Launcher** and search for **Reports**.



2. Navigate to **Folders > All Folders > ChorusReports**.



3. This page displays a list of pre-built reports using Chorus custom objects. You can modify these reports as needed.



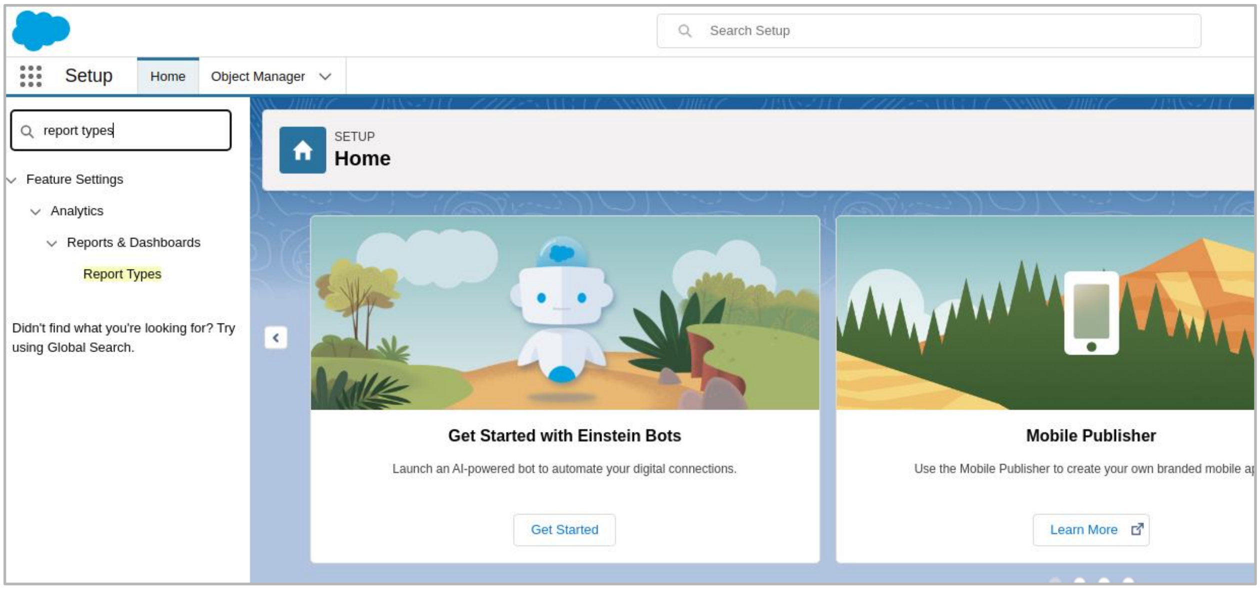
Deploy Custom Report Types

Before You Begin

If you are using version 1.155 of the Chorus CTI, change the development status of the Custom Report Types to “Deployed”. This can only be done by a Salesforce admin.

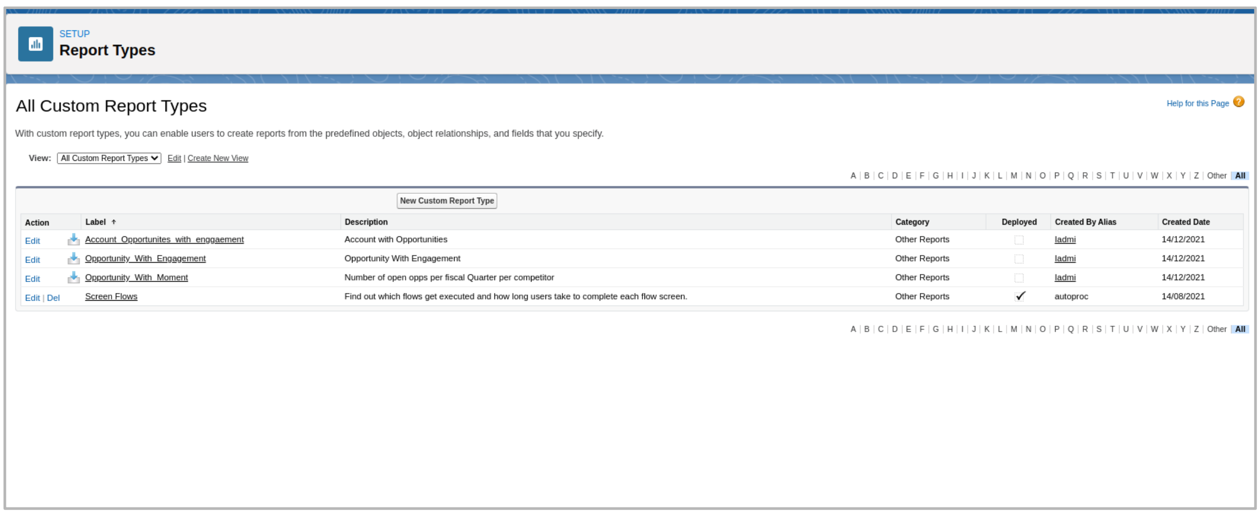
Procedure

1. Go to **Setup > Quick Find** and type **Report Types**.

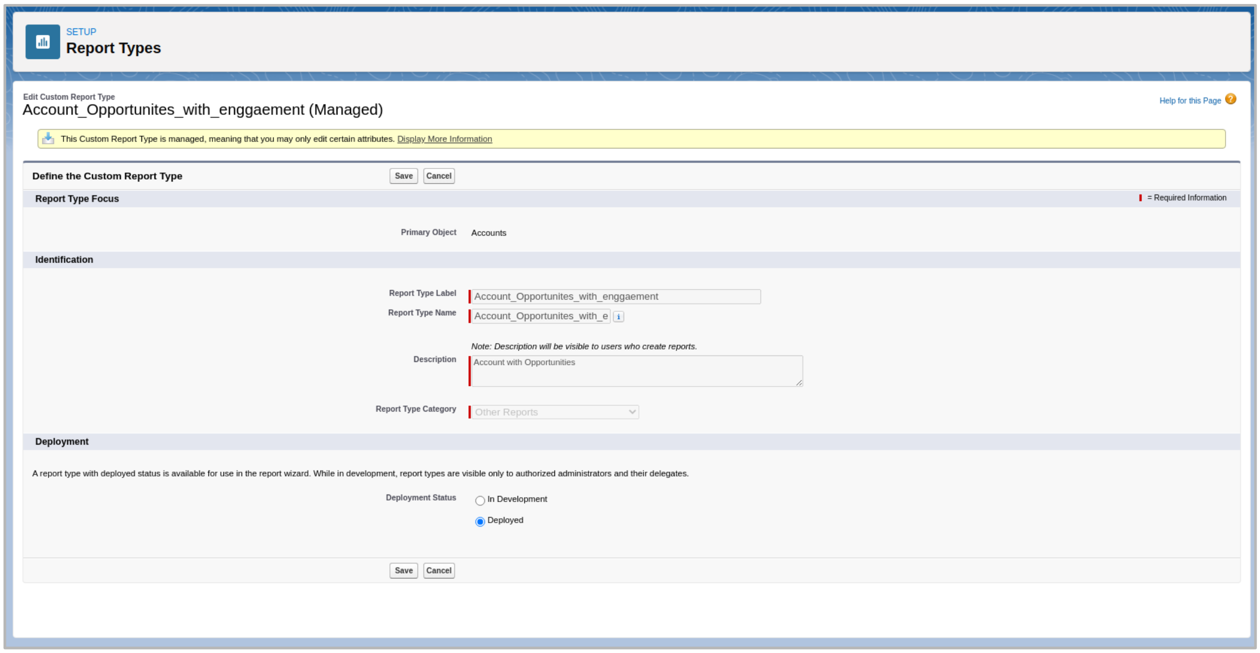


2. Click **Report Types** and locate the report type with the label "Account_Opportunities_with_engagement".

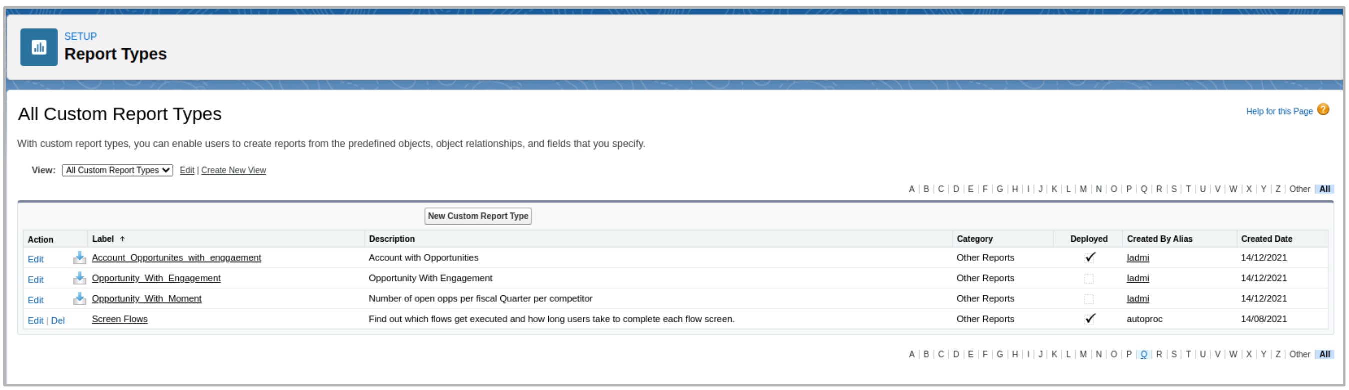
3. Click **Edit**.



4. Change the custom report type's **Development Status** to **Deployed**.



5. Click **Save**. Ensure that the **Deployed** column shows a check mark for the report.

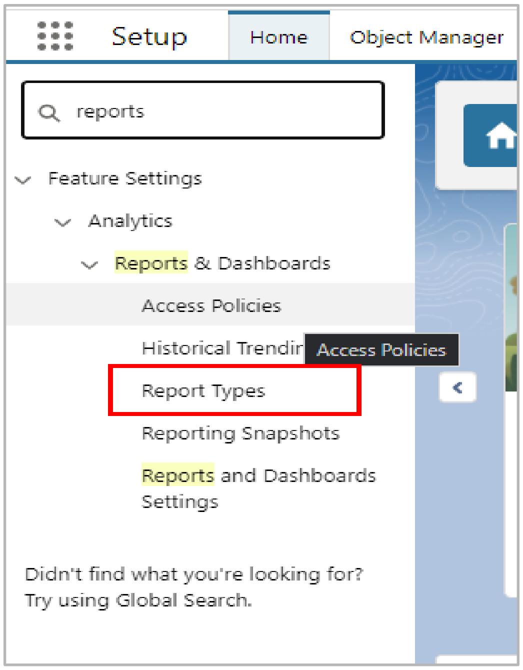


6. Repeat the same process for the remaining reports:
   - Opportunity_With_Engagement
   - Opportunity_With_Moment

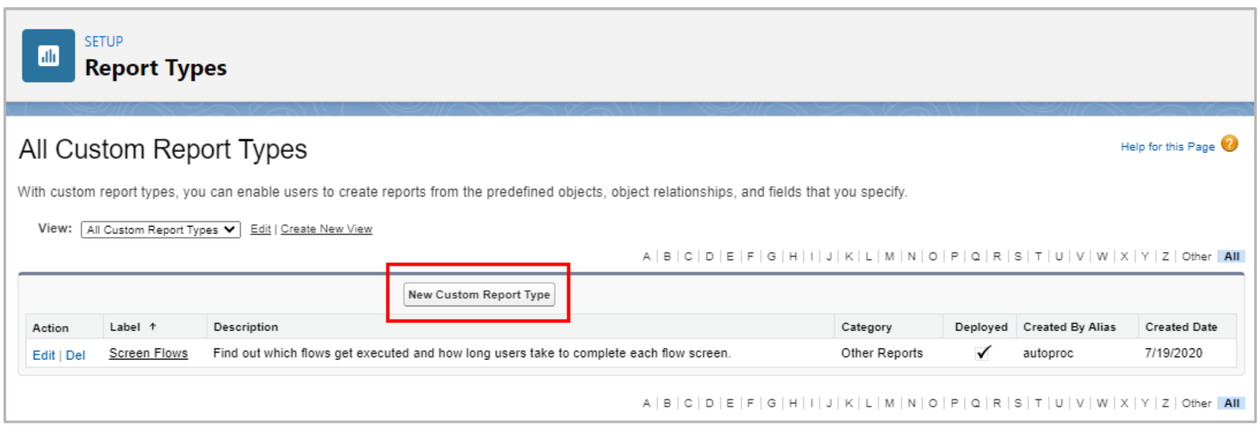
Create Report Types with Chorus Custom Objects

To create custom report types:

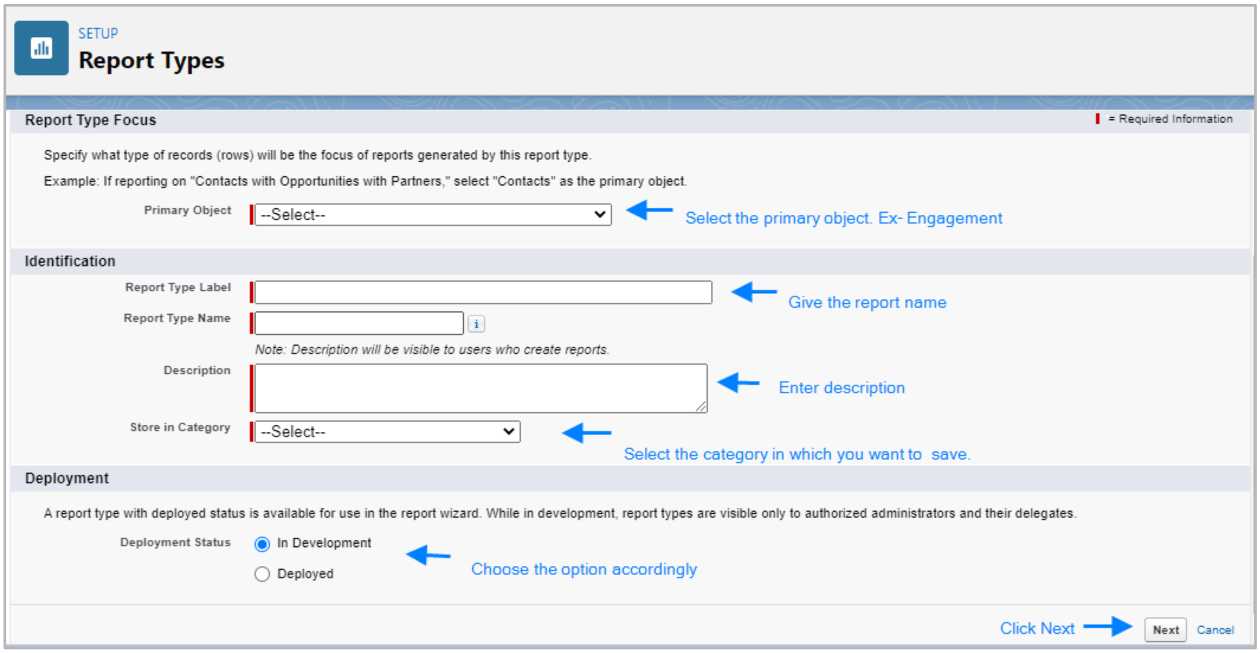
1. In Salesforce, go to **Setup**.
2. Type “Report Types” in the search box.



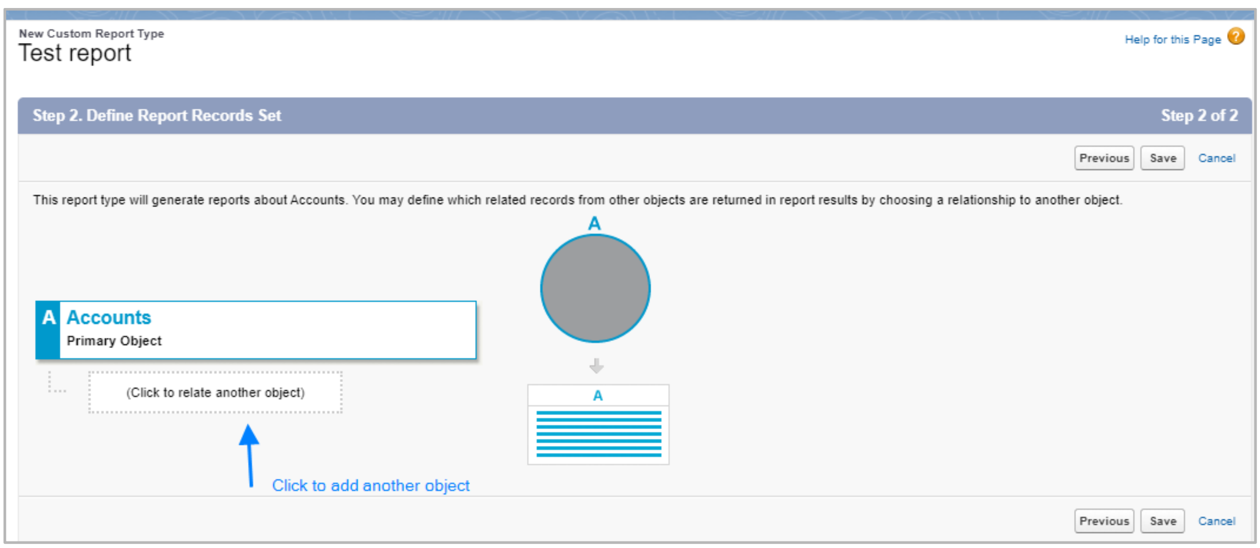
3. Click **Continue** and then click **New Custom Report Type**.



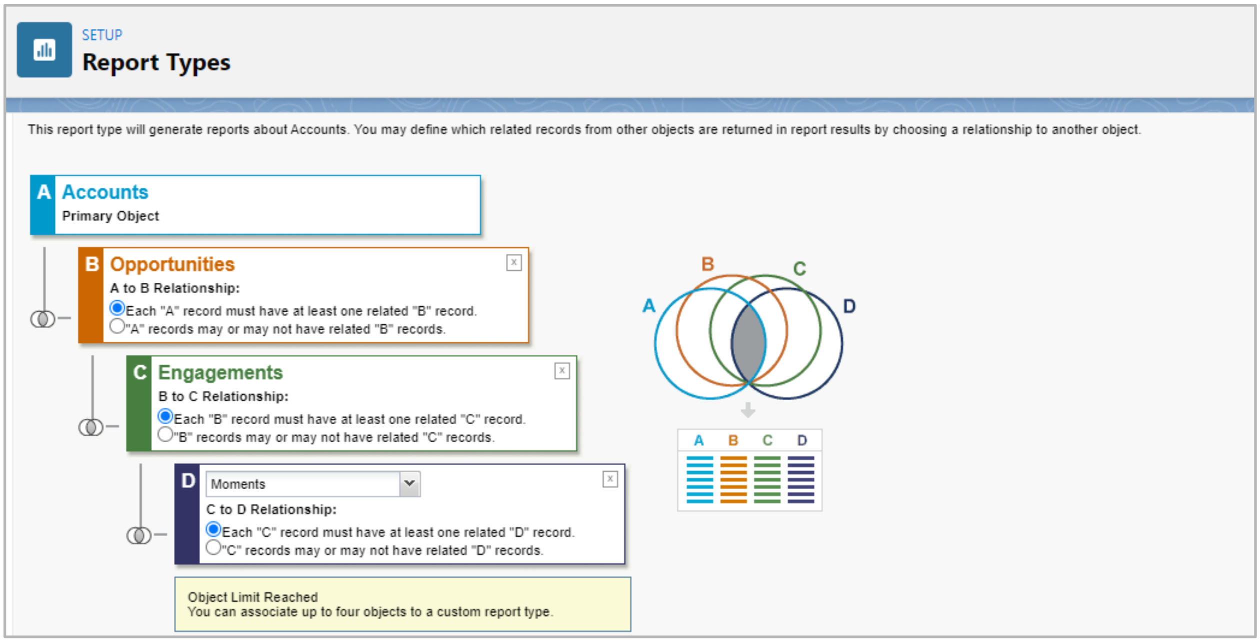
4. Complete the fields as shown in the image below.



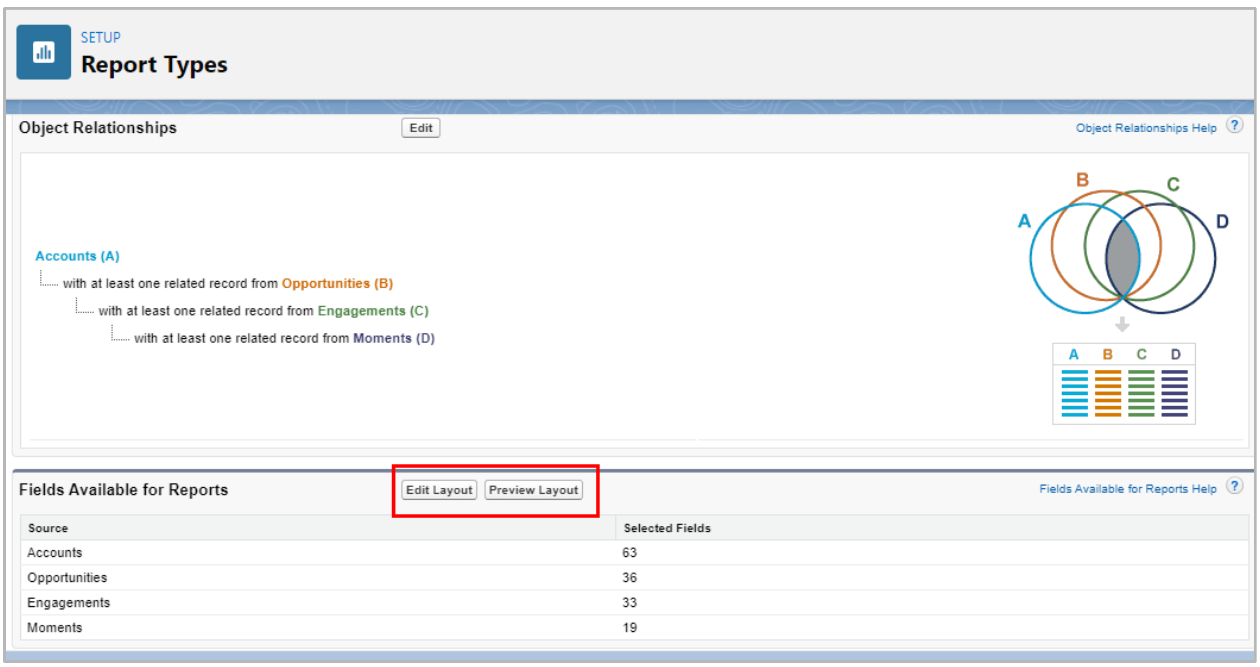
5. The **Primary Object** you selected will display, and you can optionally include up to 4 additional objects based on their relation.



For reference, here is a report with 4 objects added: **Accounts**, **Opportunities**, **Engagements** and **Moments**. In this scenario, you can also set up a relationship between them. For example, refer to the radio button on **Opportunities**.



6. Once saved you can edit the layout if needed.



7. Navigate back to **Reports** from the **App Launcher**. You will see the newly created report showing in the category that you previously defined.

You can use the newly created Report Type to start building reports and running data analysis on Chorus data within Salesforce.

Add Chorus Custom Objects to Opportunities and Contacts

To add custom objects as a Related List to the Opportunity or Contact Page layout:

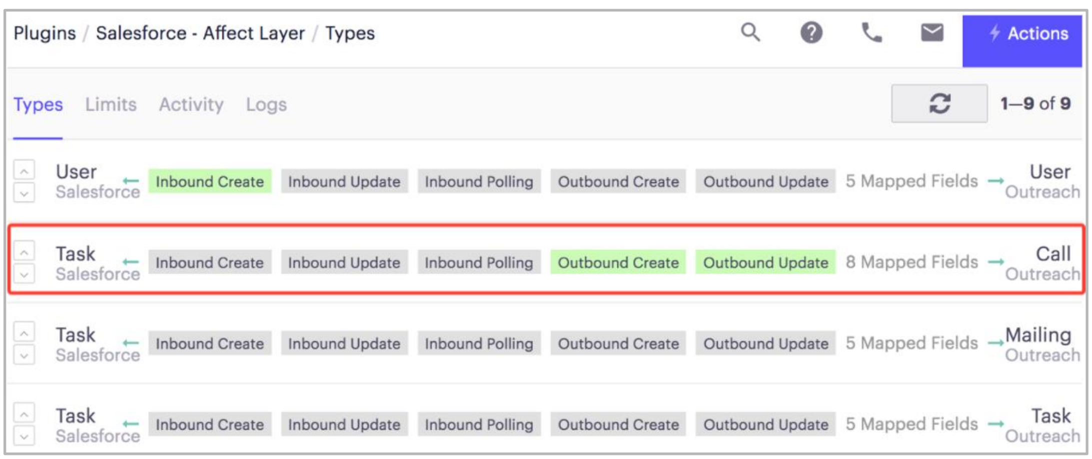
1. Go to **Setup > Object Manager** and search for "opportunity".
2. Select **Page Layouts** and click **Edit > Related Lists** from the top panel.
3. Drag and drop the appropriate Related List from the top panel to the page layout.
4. Click **Save**.

Note: If participants are not matched to contacts based on the email address found, Chorus will create contacts in order to support contact level reporting and associate them to Moments (and by extension, Engagements). To turn this off, contact ZoomInfo Support.

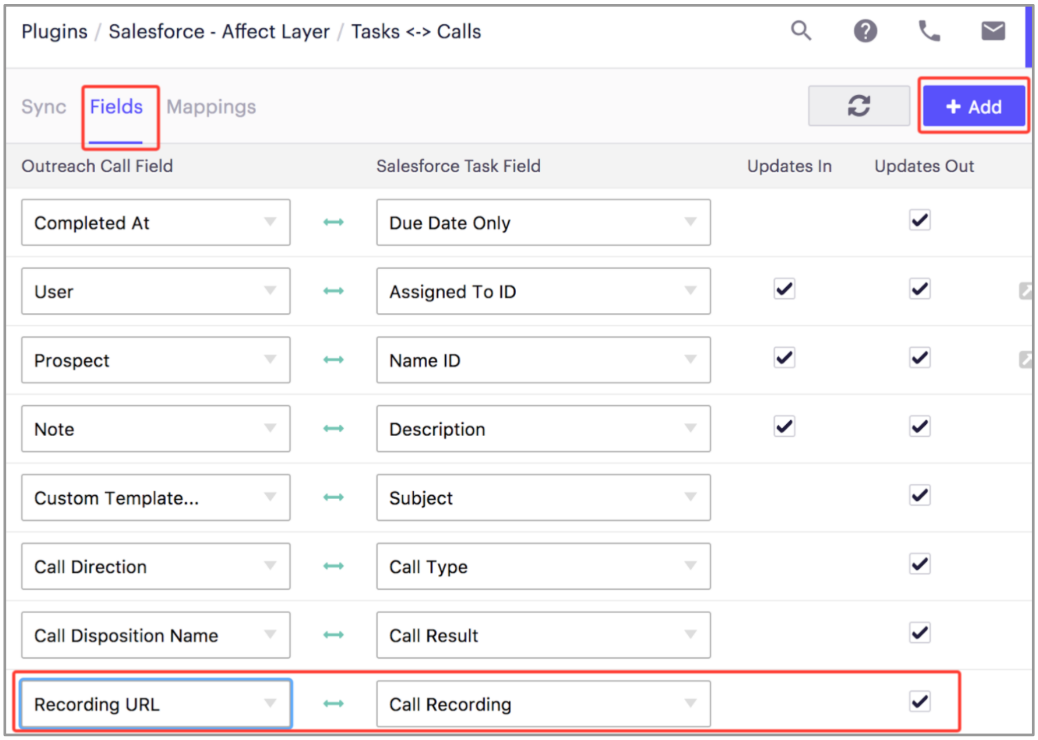
Push Outreach Recordings to Salesforce

If you use the Outreach dialer to record your outbound sales calls, you can map these call recordings to your Salesforce instance. To do this you must create a custom field at the Task level in Salesforce and map the calls from Outreach to this field. Once this is configured, you can integrate Outreach with Chorus. Chorus will pull in the recordings every hour.

1. In Outreach, go to **Settings > Plugins > Salesforce > Tasks (Calls) > Fields**.
2. Under **Plugins**, toggle on **Salesforce Affect Layer**.
3. Under **Tasks** enable **Outbound Create** and **Outbound Update**.



4. Map the Outreach **Recording URL** call field to the Salesforce **Call Recording** task field.



Important: If you don't have an existing field in Salesforce set to push the Recording URL, you'll need to create one.

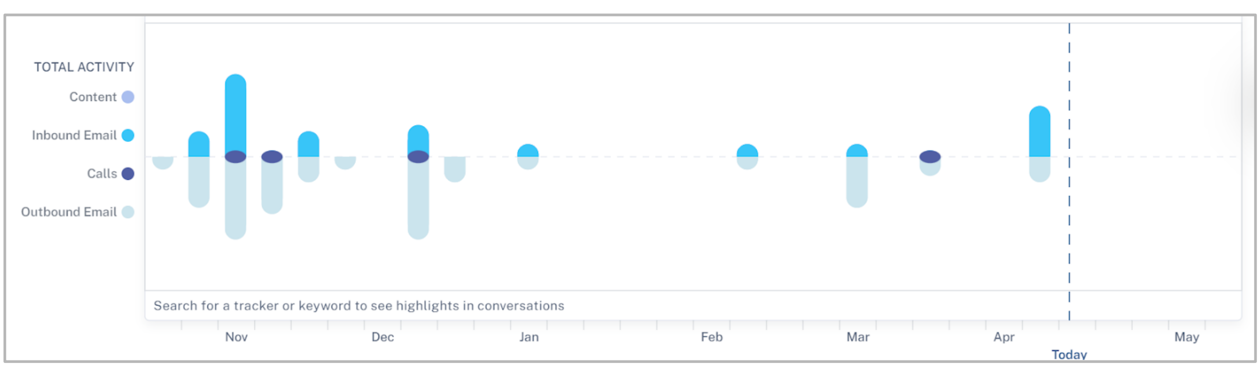
Sync Chorus Trackers with Salesforce

Once Salesforce has been synced and the Salesforce managed package has been installed, you can also sync your **Chorus Trackers** back to Salesforce. This allows you to distribute the relevant information provided by Chorus where users and managers can easily see it.

For each Chorus recording, the identified Trackers are uploaded to Salesforce and can be used in reporting, workflows, data aggregation and Opportunity management.

Here are some examples:

- **Enriched Reporting**: With Chorus Trackers synced to Salesforce, Executive dashboards, Manager reporting and daily views can be automatically updated based on the latest conversation data.



- **Competitive Deal Insight**: If a Salesforce field is automatically checked on the Opportunity, whenever “Competitor 1” is mentioned by the prospect on any call, reps and managers can instantly determine if this is a competitive Opportunity. Additionally, the “Competitor 1” field can be used to filter and determine which deals are competitive across the entire pipeline.

To sync Chorus Trackers with Salesforce:

1. In Salesforce, click **Setup**.
2. Click the **Opportunities** object, then select the **Fields & Relationships** section.
3. Scroll down and click **New**.
4. Select **Text** option.
5. Label the field ‘**Chorus Competitor**.’
6. Provision access to the field.
7. Select the desired Layouts.
8. Click **Setup** and navigate to the **Create** tab and select **Workflow & Approvals > Workflow Rules**.
9. Click **New Rule**.
10. Select the **Opportunity** object.
11. Label the rule ‘**Chorus Competitor**’, select the **Evaluation Criteria** as **created**, and **any time it’s edited to subsequently meet criteria**. Within the Rule Criteria, add **True** and click **Save**.
12. Click **Add Workflow Action** and select **New Field Update**.
13. Label the field update, **Chorus Competitor** and click the field to update and select **Chorus Competitor**.
14. Select **Use a formula to set the new value** then type the following formula:
    a. IF (CONTAINS (Chorus_Competitor__c “Your competitor name”), “Your competitor name”, “Text that will display if competitor is not found”)
15. Return to the Workflow Rules section within Setup, and click **Activate** on the **Chorus Competitor** workflow.

Sync Outreach and Chorus

You can sync Outreach and Chorus to import all of your team's conversations from Outreach.io, and display all of your recordings natively on the Account page in Outreach.io.

This will also give your team access to Chorus' AI analysis and call transcription, as well the ability to engage with all of their conversations, including call commenting, sharing, playlists, and more.

Before You Begin

Ensure these prerequisites are met:

- Chorus and Salesforce have already been synced as described in Perform Initial Connect and Sync.
- You should have Outreach Voice already set up to record your team's outbound dials. See Push Outreach Recordings to Salesforce for details.
- You have Outreach admin credentials.

Procedure

To customize your Layout in Outreach.io:

1. Go to any Account, select one of the system layouts and then select **Edit**.
2. Click **Clone**.
3. Provide a unique **Name** and set Sharing to **Shared with Others**.
4. Add the Chorus tile to your layout.
    a. Click **Add New Tile**.
    b. Select the Chorus tile.
    c. Drag and resize the tile into your Layout.

3. Click **Save**.

Your team's recordings will now show up in your Chorus tile and you can inform your team to use the new layout.

HubSpot Integration

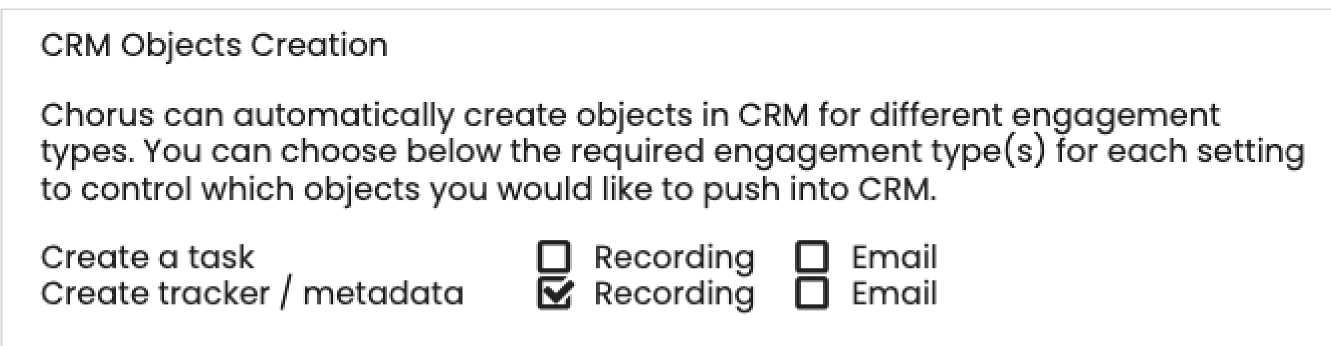
Admins can sync Chorus with HubSpot to ensure that every conversation is tied to an outcome. For example, who was called and when, what was discussed, deal progression, stages, and so on. This integration will associate your calls with the correct Company Name, Deal Name, Deal Stage, Deal Size, and Close Date allowing you to filter calls to the ones you care about most. Syncing will also create activity with data from your Chorus calls inside HubSpot.

To integrate Chorus with HubSpot:

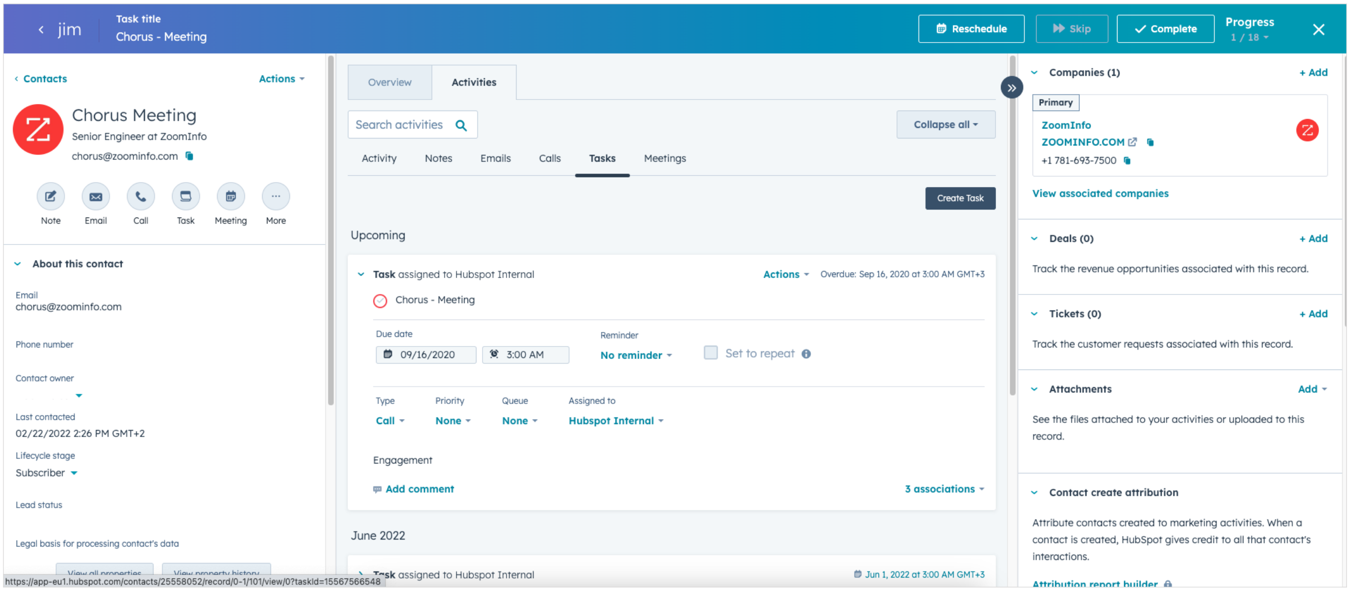
1. Log in to Chorus and navigate to the **Integrations** page.
2. Select **Enable** next to the **HubSpot Connect** option.
3. Provide your HubSpot admin credentials. HubSpot will send a confirmation code to your email account.
4. Enter the code from HubSpot into the field provided.
5. Select your account.
6. You are prompted to connect. Select **Connect app**.

Push Call Activity to HubSpot (Automatic Task Creation)

Once HubSpot is synced with Chorus, Chorus will automatically log your team's activity from their scheduled screen share meetings in HubSpot. The sync includes information about call participants, meeting subject, meeting date, next steps and other tracked topics found in the transcript.



Here's an example of a pushed task in HubSpot:



About Pushed Tasks

The default task type for Chorus tasks is Call. However, this can be modified in HubSpot.

The Pushed Tasks feature is on by default, but can be turned off if necessary by a Chorus admin using the following steps:

3. Click on your initials in the navigation bar.
4. Select Settings, then navigate to the Integrations page.

Pushed Tasks Naming Convention

All tasks pushed into HubSpot from Chorus have a naming convention that begins with “Chorus -” and ends with the name of the scheduled meeting (e.g., Chorus - Wonka and Schrute Farms Connect).

Microsoft Dynamics Integration

Admins can sync Chorus with Microsoft Dynamics to ensure that every conversation is tied to an outcome. For example, who was called and when, what was discussed, deal progression, stages, and more. This integration will associate calls with the correct Company Name, Deal Name, Deal Stage, Deal Size, and Close Date, allowing you to filter calls to the ones you care about the most. Syncing Chorus with Microsoft Dynamics will also create activity with data from your Chorus calls inside Dynamics.

To integrate Chorus with Dynamics:

1. Log in to Chorus and navigate to the **Integrations** page.
2. Click **Enable** next to the **DynamicsConnect** option.
3. Type or paste your organization’s unique Dynamics URL.

   Note: You can find this link when logging into Dynamics. It will look similar to *https://EXAMPLE.crm.dynamics.com*.

4. Click **Connect**.

5. Log in to Microsoft Dynamics.

Push Call Activity to Microsoft Dynamics (Automatic Task Creation)

Once Microsoft Dynamics is synced with Chorus, Chorus will automatically log your team's activity from their scheduled screen share meetings in Microsoft Dynamics. The sync includes information about call participants, meeting subject, meeting date, next steps and other tracked topics found in the transcript.

CRM Objects Creation

Chorus can automatically create objects in CRM for different engagement types. You can choose below the required engagement type(s) for each setting to control which objects you would like to push into CRM.

Create a task	☐ Recording	☐ Email
Create tracker / metadata	☑ Recording	☐ Email

Here's an example of a pushed task in Microsoft Dynamics:

Comments
RECORDING:
https://chorus.ai/meeting/3810048?call=CD2590C3E9CE4885ADE9C6D213C44870123

ATTENDEES:
Michael Scott, Regional Manager
Dwight Schrute, Assistant to the Regional Manager
Todd Packer, Field Sales
Fake Acme Employee, Account Executive

KEY TOPICS DISCUSSED:
Impact, Competitor 1, Pain, Budget, Need, Metrics, Background, Use Case, Timing, Authority

NEXT STEPS (TRANSCRIPT):
* Sure, I'll send you the invite for Friday at 3pm. Anything else I could answer for you?
* There's a bunch of other security documentation as well, I'll shoot them over after the call
* Great question, let me ask my solutions engineer and i'll get back to you

About Pushed Tasks

The default task type for Chorus tasks is Call. However, this can be modified in Dynamics.

The Pushed Tasks feature is on by default, but can be turned off if necessary by a Chorus admin using the following steps:

5. Click on your initials in the navigation bar.

6. Select Settings, then navigate to the Integrations page.

Pushed Tasks Naming Convention

All tasks pushed into Microsoft Dynamics from Chorus have a naming convention that begins with "Chorus -" and ends with the name of the scheduled meeting (e.g., Chorus - Wonka and Schrute Farms Connect).

Create Tasks for Unrecorded Meetings (Salesforce, HubSpot, and Dynamics)

Occasionally, you may have a business case where customer calls do not need to be recorded. However, without the recordings, it is difficult to establish an accurate total number of customer interactions.

You can get a more complete record of customer interactions, even the ones that weren't recorded, by enabling task creation for calls. This feature will create a task in Salesforce, HubSpot, and Dynamics.

How it works (Admins):

Chorus admins can enable this feature from **Integrations > CRM Objects Creation > Create a task**.

Notes:

- Meetings that are turned off (the user explicitly asked Chorus not to record) will not be pushed.
- Meetings with only internal or ignored participants will not be pushed.
- Meetings with at least one block-list participant will not be pushed.

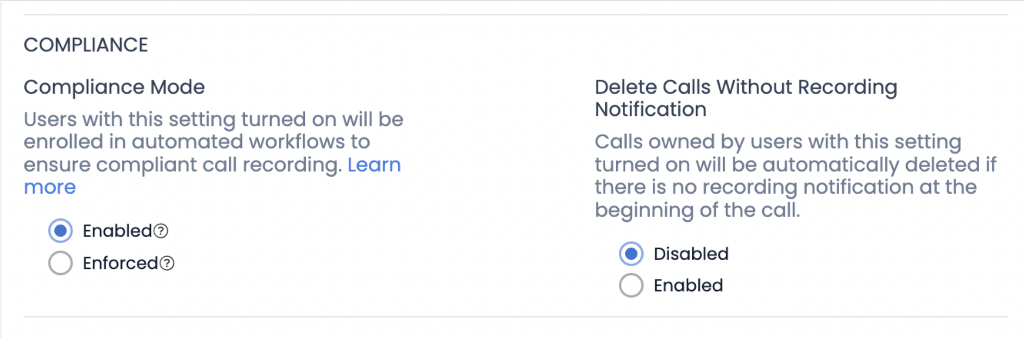
Delete Non-compliant Dialer Calls

Admins can use role-based permissions to configure which calls should be deleted if the recording notification is missing at the beginning of a call.

Calls owned by users with this setting enabled will auto-delete if recording notification is missing.

How it works (Admins):

Navigate to **Settings > Roles and Permissions > Compliance > Delete calls without recording notification > Enabled**.



Who gets it? All organizations with Enterprise packages.

Account Matching

If you use Salesforce and have installed the ZoomInfo Salesforce Native Application, Chorus will use specific criteria, in a specific order, to determine if existing account information in Salesforce matches with call participants. (See note below for other CRM integrations.)

1. ZoomInfo Company ID associated with accounts in your Salesforce instance (ZoomInfo Salesforce Native Application must be installed)
2. Company domain of call participants email addresses
3. Participant full email address
4. If you use only Chorus and Salesforce (the ZoomInfo Salesforce Native Application is not installed) Chorus will use domain name as the primary matching criteria and exact email as secondary criteria.

Notes:

- If you are using a CRM other than Salesforce, the matching process is the same. However with Salesforce and the ZoomInfo Salesforce Native Application, Chorus is able to access the DOZISF__ZoomInfo_Id__c field for additional matching confirmation. Access to this field for Chorus account matching is currently not available with other CRM integrations. For CRMs other than Salesforce, Chorus will use domain name as the primary matching criteria and exact email as secondary criteria.
- If multiple domains for the same company are detected in your Salesforce instance, Chorus will align the call recording with the account in your Salesforce instance based on activity. To do this we sort domains based on both prevalence and the number of open opportunities slated for closure in the near future.

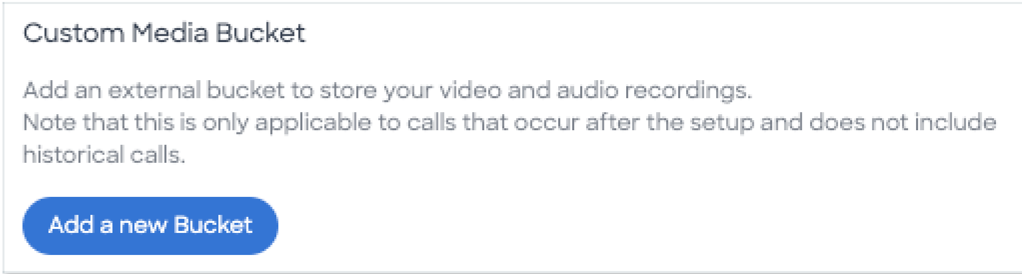
Cloud Storage for Recordings (Custom Media Bucket)

Organizations with the Chorus Enterprise package can choose to store Chorus recordings in your object storage software such as AWS S3, Google Cloud, and Azure Blob Storage.

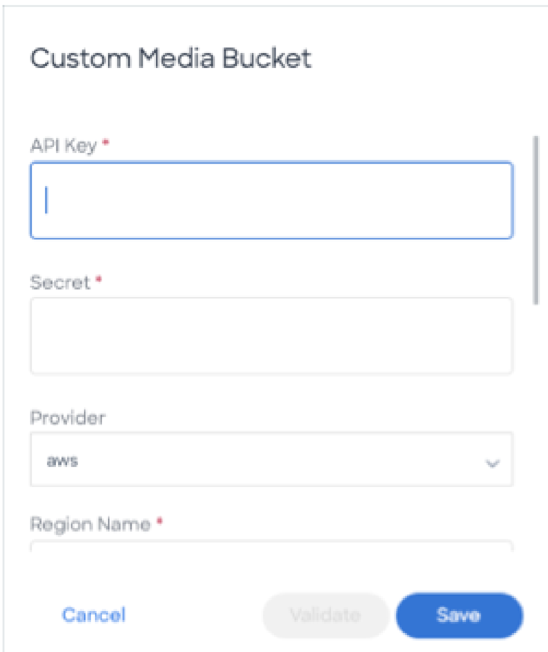
Admins can create a **Custom Media Bucket** in Chorus with the following steps:

1. Log in to Chorus and navigate to the **Integrations** page.

2. Scroll to **Custom Media Bucket**.



3. Click **Add a new Bucket**.
4. Enter **Custom Media Bucket** details in the popup.



5. Click **Save**.

Integrate with Conferencing and Work Productivity Tools

Chorus joins your screen share meetings automatically once your calendar is synced. Chorus will scan your calendar and look for business meetings that have a screen share link plus an attendee that has a different email domain from the email you are using.

General Web Conferencing Integration

Chorus connects with over a dozen web conferencing and screen share providers. Once your calendar is synced, Chorus will automatically scan it for business meetings that contain a screen share link, as well as for any attendees that have a different email domain than you. Chorus will then join your meetings as a Notetaker with no additional setup or integration required on your part.

Currently supported web conferencing and screen share providers include:

3CLogic

Google Meet

8x8
Amazon Chime
Avaya
BlueJeans
Cisco WebEx (may require customization)
Clearslide
Demodesk
Dialpad
Go-To-Meeting
HighFive
Join.me
Microsoft Teams
RingCentral Meetings
RingCentral Video
Skype For Business
UberConference
Vonage
Zoom

Zoom Considerations

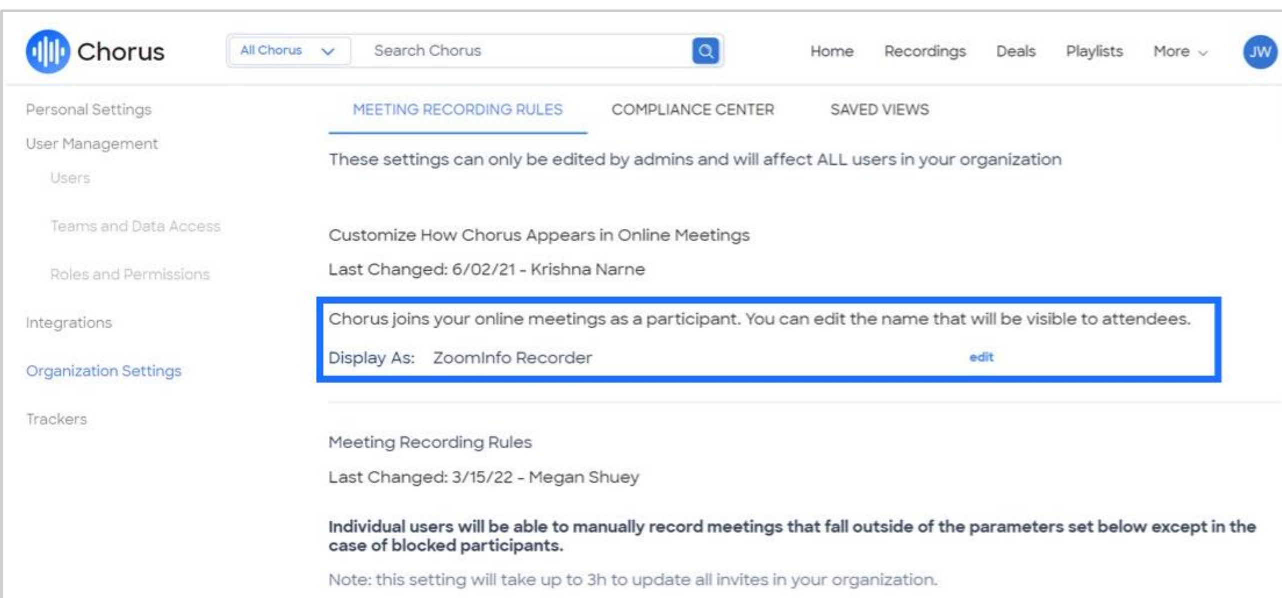
If you currently use Zoom, follow the steps found in [How to Integrate Zoom With Chorus](). Integration will streamline compliance and improve your video and audio quality. Without this integration, Chorus will join your meetings as an additional participant.

If you have additional questions, please contact [chorussupport@zoominfo.com]().

Rename the Chorus Notetaker

To rename the Chorus Notetaker:

1. Navigate to the **Organization Settings** tab.
2. Under **Meeting Recording Rules**, click **Edit** to the right of the **Display As** option.
3. Update the Notetaker name.



Note: Not all conferencing platforms support the renaming of the Chorus Notetaker, and the **Display As** custom renaming is not supported for Google Meet.

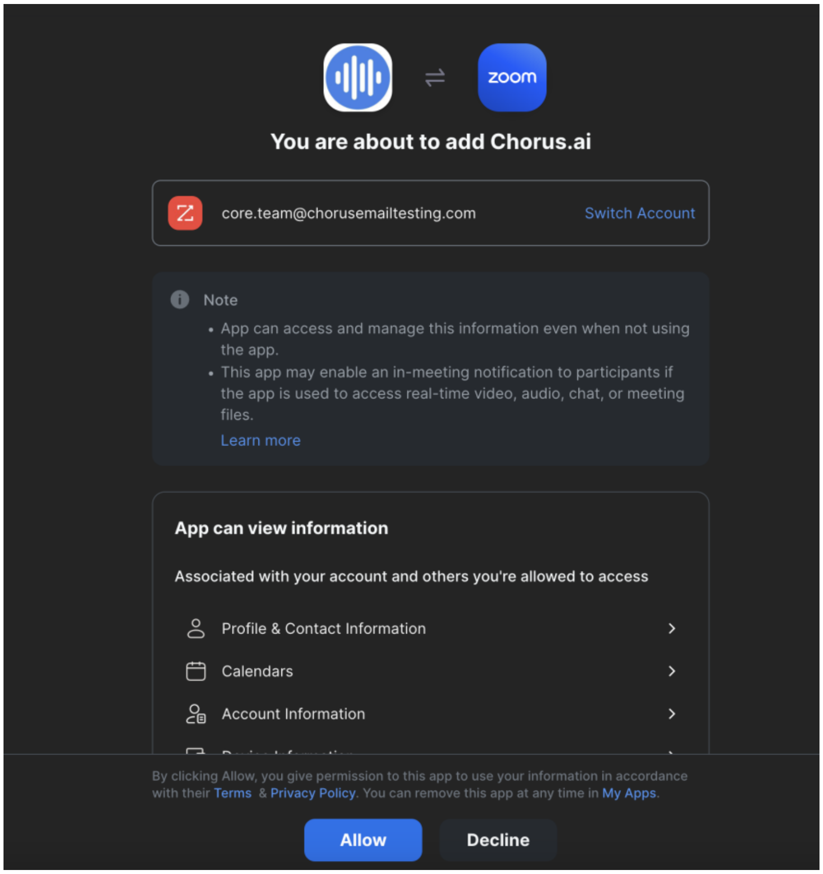
Native Zoom Integration

Prerequisites: You must have Chorus admin permissions and Zoom Owner permissions.

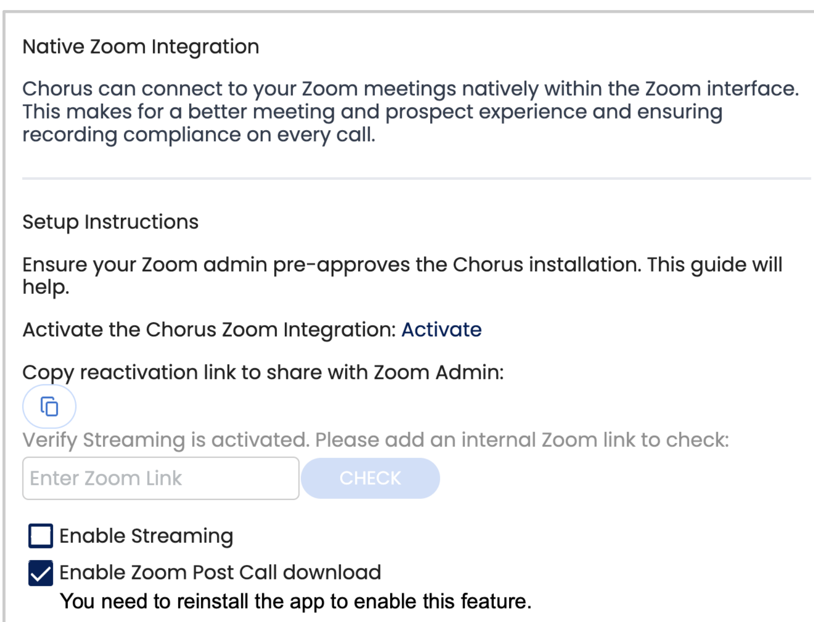
Integrate Zoom with Chorus (admin):

1. In your Zoom Account, ensure **Cloud recording** is turned **ON** for your entire organization. Save this setting for all users.
    a. Chorus will use the native Zoom recording interface, which means your recordings will be stored both in Zoom and Chorus.
    b. **Important**: It is recommended that you auto-delete Zoom recordings after seven days to make sure your Zoom storage doesn't overflow. Navigate to **Settings** and enable **Delete cloud recordings after a specified number of days**.
2. Ensure **Multiple notifications for phone users** is **ON**.
3. Enable the recording disclaimer to capture explicit consent (required for GDPR).
4. Ensure **Custom Live Streaming Service** from the options menu is **ON**. Navigate to the **Meeting** tab **> Advanced > Allow live streaming of meetings**.

    Note: You do not need to enter anything in the text box below the **Custom Live Streaming Service** option once enabled.
5. From the Zoom Marketplace search for **Chorus.ai**.
6. Toggle on **Approve app** and select the users who will be allowed to use the app then click **Save**.



7. Click **Allow**. You will be redirected to Chorus Integrations settings. Follow the steps in Chorus under **Native Zoom Integration**.



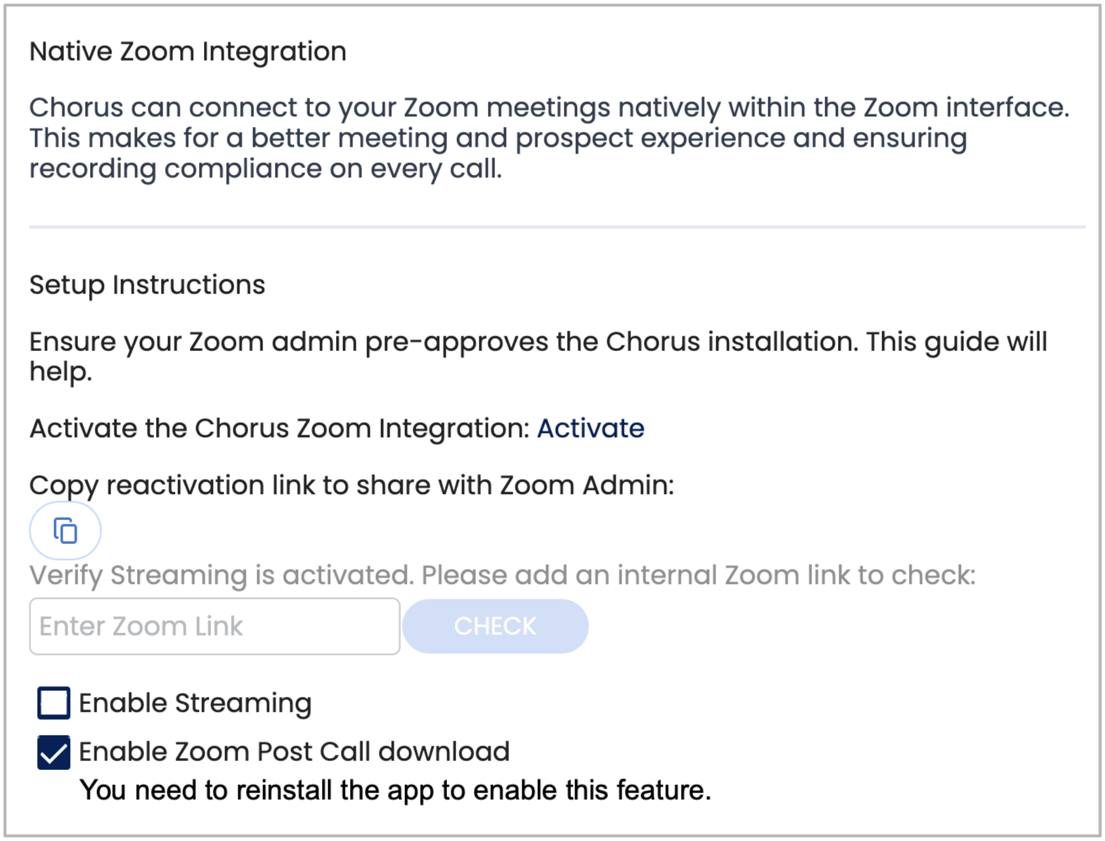
Information about [Managing user groups and settings] can be found within Zoom documentation.

Set Up Post Meeting Downloading with Chorus and Zoom

During a Zoom call, participants may be sensitive to recording, “live streaming” language, or apprehensive about the participation of a Chorus Notetaker. Chorus has alternative methods of recording available for the Zoom native integration. This is known as a **Post Meeting Downloading**.

With Post Meeting Downloading, your meeting recording happens within Zoom itself. Following the completion of your meeting, the recording is automatically uploaded and processed in Chorus.

1. Navigate to **Settings > Integrations > Native Zoom Integration**
2. Ensure your Zoom admin pre-approved the Chorus installation.
3. **Activate** the Chorus Zoom integration.
4. Enable Zoom Post Call Downloading by checking the **Enable Zoom Post Call download** box.



Choose your recording method

Once you integrate Zoom with Chorus you then can select your recording method. You have the following options as recording methods:

- **Streaming** - The native Zoom real-time streaming method allows for high video and audio recording with the fastest processing time.
- **Zoom Post Call Download** - The native Zoom post-call downloading recording method is best for companies that want to avoid Zoom's "live streaming" recording notification. Chorus must wait for Zoom to process your recording before bringing your recording to Chorus for processing.
- **Chorus' Notetaker Recording Bot** - This recording method is best for customers using online meeting providers that are not Zoom. (Enterprise package only.)

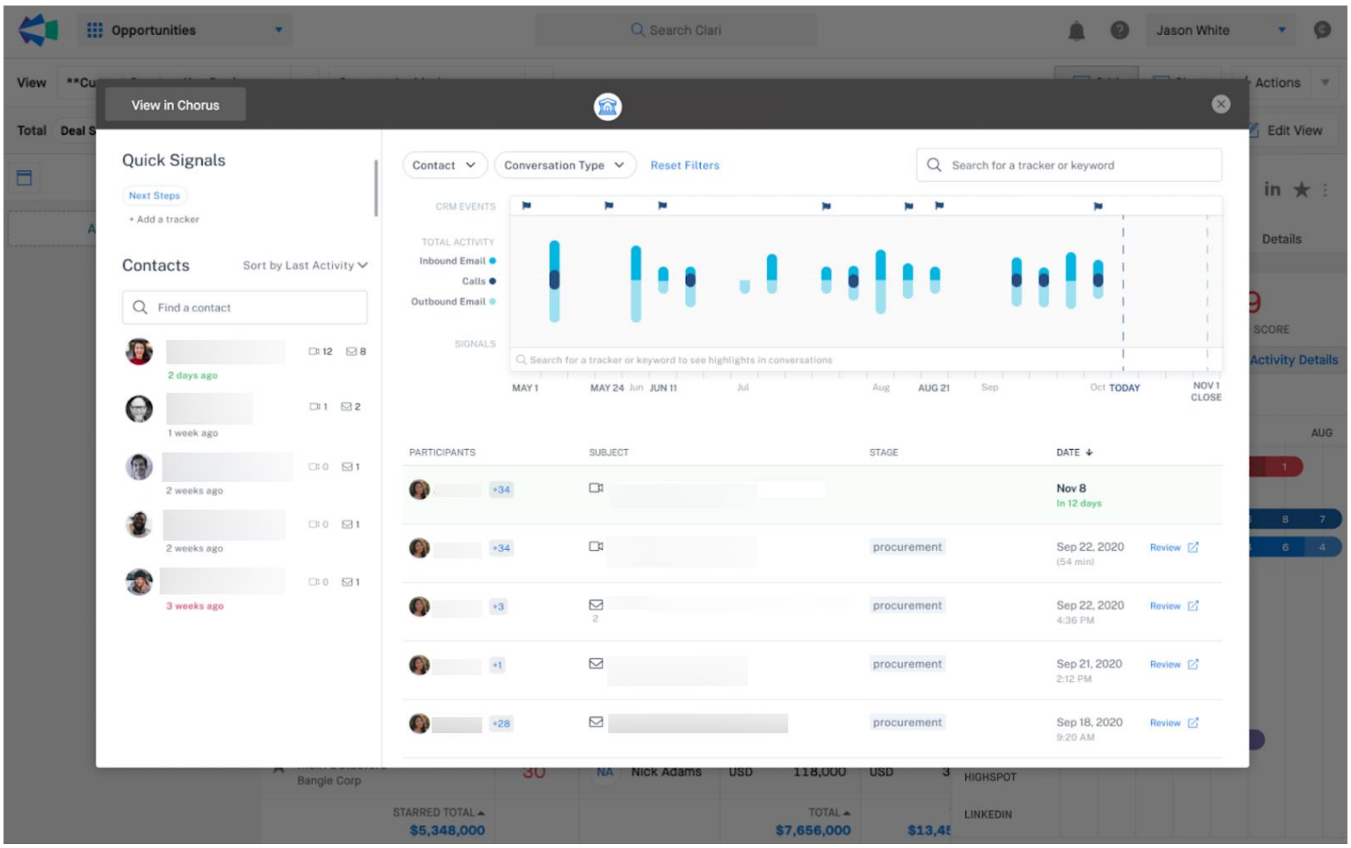
  Note: If you have not integrated Zoom with Chorus, this is the default recording method used.

Notes:

- Once Zoom completes processing, Chorus will begin the ingestion process and notify you when the recording is ready.
- If post meeting downloading is enabled, the Chorus App for Zoom will be unavailable for use.
- This option is currently available for Enterprise package only.

Clari Integration

Chorus and Clari have joined forces to bring first-hand conversation and revenue insights from Chorus directly into the Clari platform. Within Clari Deal and Account views you are able to access Momentum by Chorus.



The integration is toggled on in Clari and will require users to log in to their Chorus instance to use it. To get started, reach out directly to the Clari Customer Success team or email support@clari.com who will activate this integration within the Clari product.

Gainsight Integration

The integration with Gainsight allows you to automatically create activity on the Gainsight Timeline from your Chorus online meetings and calls. This gives you a centralized view of your customer data. With the Gainsight integration, you can automatically create new activity from Chorus calls and online meetings with the following data:

- Engagement title

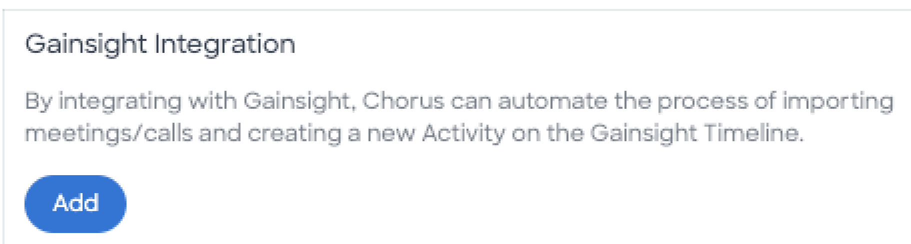
- Meeting recording link
- External and internal attendees
- Trackers
- Duration
- Embedded video player with meeting recording
- Meeting summary and action items (Chorus Enterprise package only)

Before you begin: You must have a working Salesforce connection with Gainsight to implement Gainsight.

Important: Chorus calls need to be matched to a CRM Account (SFDC) and the matching Gainsight account in order for Chorus to create the Gainsight task/object. (The account the recording is associated with must exist in both SFDC and Gainsight prior to the call being made.)

To configure the integration between Chorus and Gainsight:

1. Log in to Chorus and navigate to the **Integrations** page.
2. Scroll to the **Gainsight Integration** section and click **Add**.

3. Enter your **Access Key** and **Domain Name**.

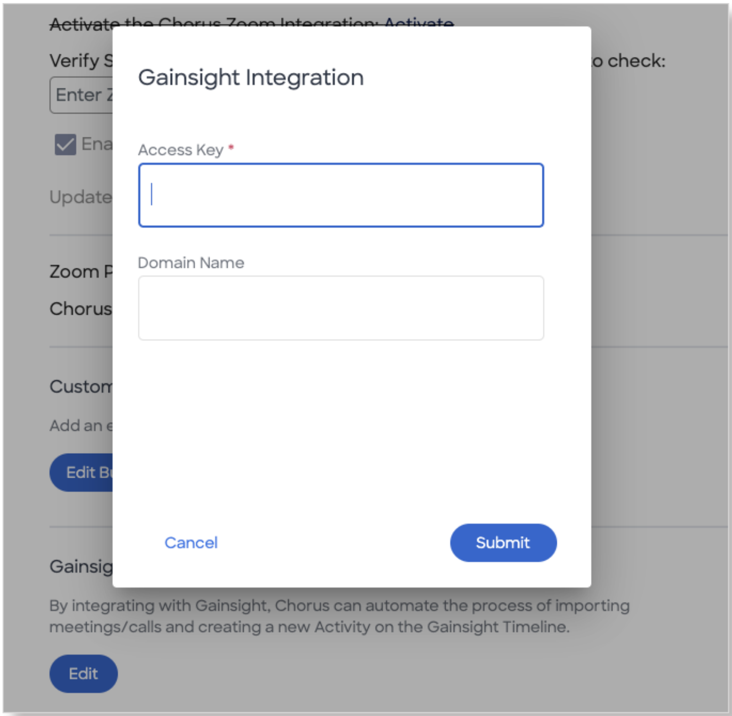
   Note: The “Domain Name” is the leading part of the full domain.

   Example, if the Gainsight URL is https://NAME.gainsightcloud.com/ you will only need to use NAME for the Domain Name value.

   The Access Key is provided by Gainsight.

   For details see: Gainsight public documentation with instructions how to Generate API Access Key.

   In Gainsight: Find the Access Key through **Cogwheel > Integrations > Connectors 2.0**.



4. Fill out connection details and click **Submit**.

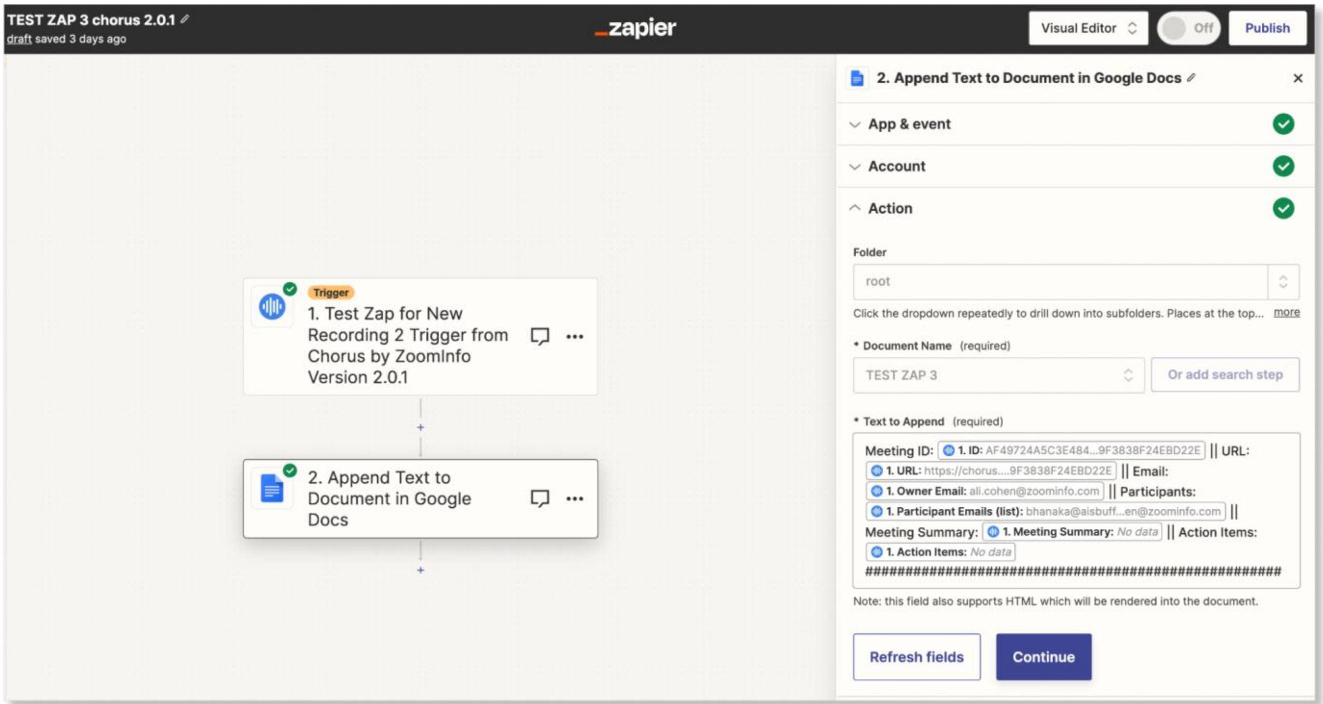
Zapier Integration

Organizations with the Chorus Enterprise package and access to API can integrate with Zapier.

Zapier is an online automation tool that connects various web applications and enables them to work together seamlessly. This allows users to create automated workflows, known as "Zaps," without the need for coding or technical expertise.

Creating a Zap for Chorus allows you to:

- Improve information flow between Chorus and non-integrated software using a no-code Zap from Zapier.
- Trigger actions in non-integrated software based on new post-meeting briefs.



How it works:

1. Go to **Zapier.com** and create a new account or log in.
2. Click on **Create a Zap**.
3. Click **Trigger** then search for **Chorus by Zoominfo app**.

   More details will be displayed about the Chorus app.
4. Click **Continue**.
5. Click **Sign into Chorus**.
6. You will be prompted to enter a Chorus API token. You can generate this from Personal Settings inside Chorus the platform.
7. Enter the API token and click **Yes > Continue**.
8. Start building your Zap.

We enhanced our Chorus integration with **Zapier** allowing you to add **Post-Meeting Briefs** and **Action Items** when building a new Zap for Chorus.

You will see the fields that have been added for **Meeting Summary** and **Action Items**.

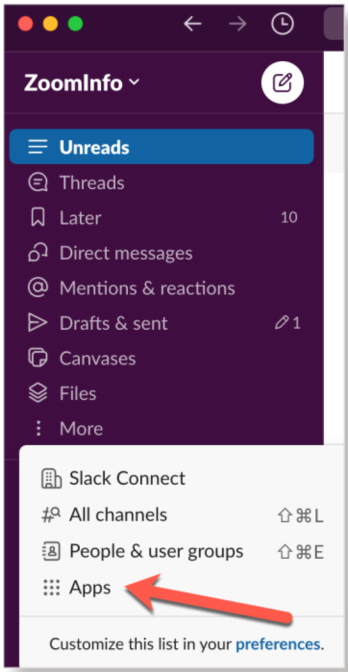
Notes:

- This feature is for Enterprise customers only and requires API.
- We cannot generate Meeting Summary or Action Items for meetings less than 10 minutes.

Slack Integration

Adding Chorus.ai to Slack:

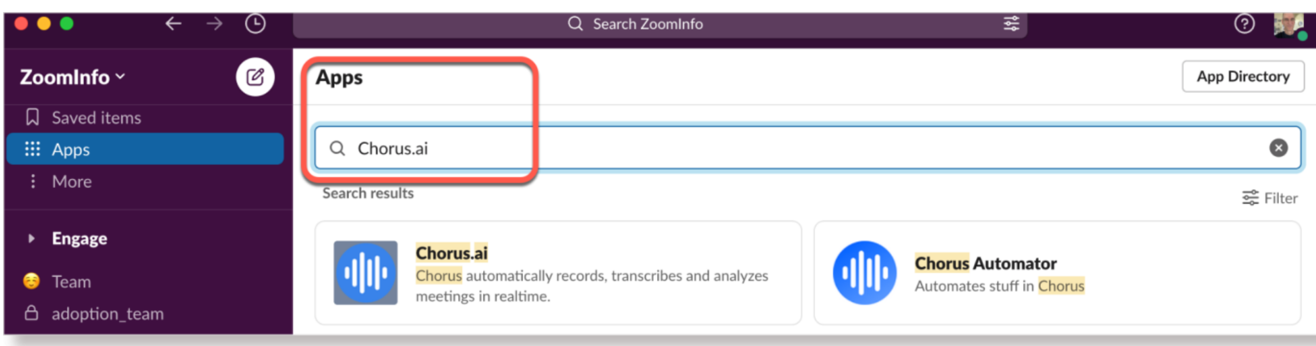
1. In Slack click **Apps**. (Found at the top of the Slack menu under **More**.)



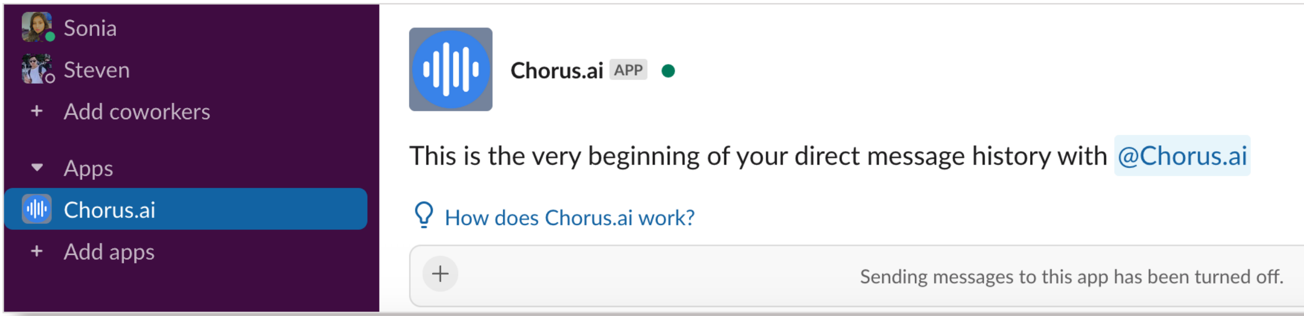
2. Alternatively click **+ Add apps** from the bottom of the Slack menu.

3. Search for **Chorus.ai**.

4. Click on the **Chorus.ai** icon to enable for Slack.



You will see the Chorus.ai app added to your Slack Apps section at the bottom left of the Slack menu.



Notes:

- Organizations need to have the Chorus Enterprise package for this feature to work.
- Additional information about the Chorus integration for Slack can be found here.

Post-Meeting Briefs in Slack

Post-meeting briefs give you a summary of meetings along with any correlating action items derived from generative AI.

If you use **Slack** and you've enabled the **Chorus.ai** Slack app, you can receive post-meeting briefs in your Slack feed.

Note: Slack also allows you to forward private messages. Given this, you can forward Post-meeting Briefs in Slack if needed.

How it works:

1. Hover over the message you'd like to share and click the **Forward message arrow icon** on the right.
2. Use the drop-down menu to choose where you'd like to share the message.
3. Click **Forward**.

Add Post-Meeting Summaries in Slack channels

You can now receive Post-Meeting Summaries for specific Chorus accounts in their associated Slack channels.

By using Slack commands (e.g `/chorus-track-account`) within a designated Slack channel you can track a specific account or opportunity. This will be applicable only to the Slack channel where the command is used.

Note: This feature only works with Slack channels, not with Slack Direct Messages.

You can use the following commands:

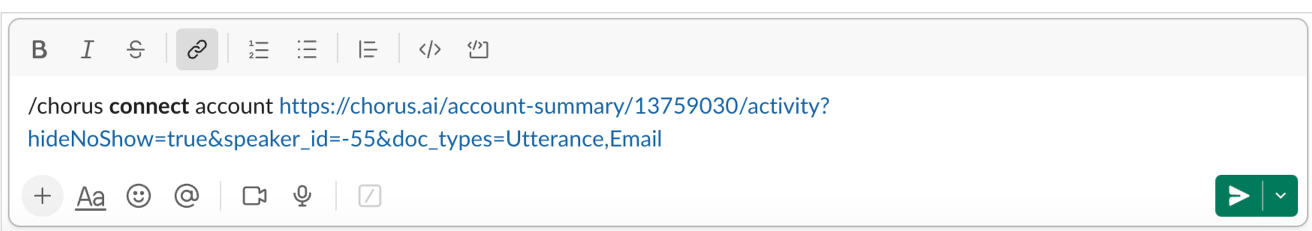
In your Slack channel, type `/chorus` or `/chorus help` and the Chorus app will display the following options:

- `/chorus connect account link_to_account`: This command connects an account in Chorus to your Slack channel where `link_to_account` is a link to the account in Chorus.
- `/chorus connect opportunity link_to_opp`: This command connects an opportunity in Chorus to your Slack channel where `link_to_opp` is a link to the account in Chorus.
- `/chorus disconnect all`: This command disconnects all accounts and opportunities from this slack channel.
- `/chorus show all` Slack will show a list of all connected accounts and opportunities in the Slack channel where the command is used.
    - Command line results will be as follows:
        - Command not found
        - No Slack integration
        - Bad URL
        - Successfully connected opportunities/accounts
        - Already connected
        - Show my connected accounts/opps
        - Disconnect all the accounts and opportunities

How it works:

1. In Slack, click into the Slack channel where you want to receive Post-Meeting Summaries.
2. In the message box at the bottom of that channel type any of the command lines above.
3. From Chorus, copy the account or opportunity URL and paste it as part of the command line `link_to_account` or `link_to_opp` section.

Example:



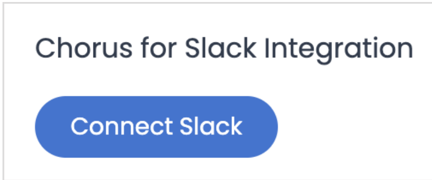
After each meeting involving the tracked account, Chorus will send meeting summaries and action items to the Slack channel where the command was used.

Note: You may receive an error message when attempting to use the Slack commands. If so, reconnect your integration to Slack.

Connect Chorus to Slack:

1. In Chorus, navigate to **Settings > Personal Settings**.

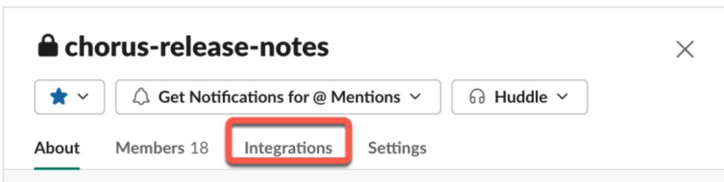
2. Scroll to **Chorus for Slack Integration**, click **Connect Slack**.



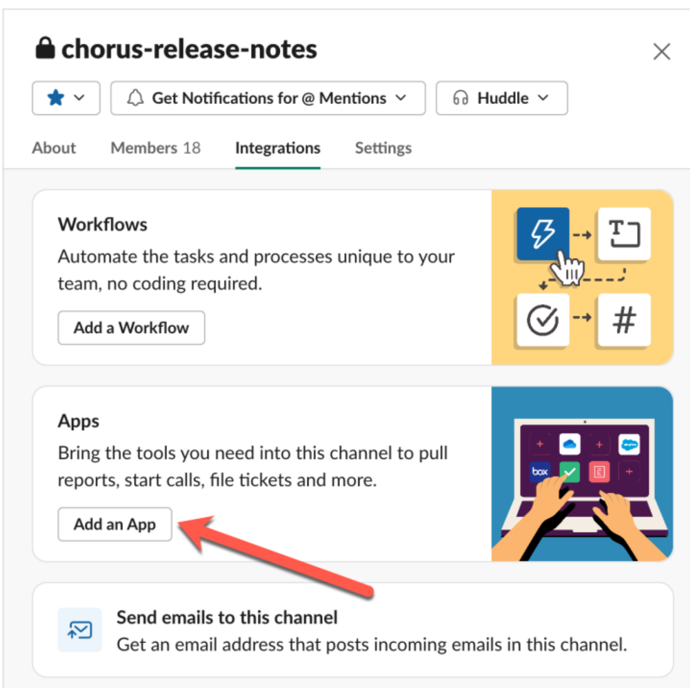
Private Slack channels:
To use this feature with private Slack channels, add the **Chorus.ai app**.

How it works:

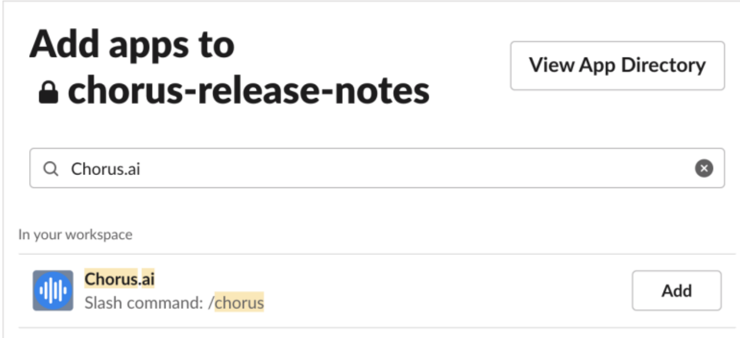
1. In the private channel, click the channel name then click **Integrations**.



2. Click **Add an App**.



3. Search for **Chorus.ai** and click **Add**.



Alternatively you can add Chorus to a private channel by using the message field and mentioning **@Chorus.ai**. Slack will ask you to add Chorus to the channel.

Dialer Integration

Chorus integrates with most popular dialer options. Once synced, Chorus provides features like automatic transcription, theme detection, commenting, and more.

Syncing allows Chorus to import your team's conversations through each dialer. Once initial integration is complete, Chorus will load the last seven days of calls from the dialer into Chorus. It will then upload and analyze calls on an hourly basis.

Note: To integrate Chorus with most dialers, you must be connected to Salesforce, HubSpot or Microsoft Dynamics. Exceptions include the following dialers: ZoomInfo Engage, HubSpot Dialer, Zoom Phone, or Shoretel Sky/Mitel. For all other dialers, ensure your CRM has already been connected to Chorus.

To configure a dialer:

1. Select **Settings** > **Integrations** > **Dialer Integrations** > **Add a New Dialer**.
2. Select the dialer that you want to connect.
3. Locate your dialer in the following table to view the additional actions needed to integrate.

Dialer Name	Directions
3CLogic	Input your 3CLogic Username and Password and select the Salesforce API field name your organization uses for your call outcome (e.g. Call_Recording__c)
8x8	Input your 8x8 Username and Password and select the Salesforce API field name your organization uses for your call outcome (e.g. Call_Recording__c)
Aircall - Hubspot	Input your Aircall API Key and Auth Secret Key. Not sure? Ask your Aircall rep.
Amazon Connect	Input your AmazonConnect Auth Key and Auth Secret Key (not sure? Ask your AmazonConnect rep) and select the

Dialer Name	Directions
	Salesforce API field name your organization uses for your call outcome (e.g. Call_Recording__c)
Apollo	Select the Salesforce API field name your organization uses for your call outcome (e.g. Call_Recording__c)
CloudTalk	Select the Salesforce API field name your organization uses for your call outcome (e.g. Call_Recording__c)
ConnectAndSell	Select the Salesforce API field name your organization uses for your call outcome (e.g. Call_Recording__c)
Koncert (formerly ConnectLeader)	Select the Salesforce API field name your organization uses for your call outcome (e.g. Call_Recording__c)
Conquer (formerly DialSource)	Select the Salesforce API field name your organization uses for your call outcome (e.g. Call_Recording__c)
DialPad	Select the Salesforce API field name your organization uses for your call outcome (e.g. Call_Recording__c)
Engage Dialer	See [this section] for Engage Dialer integration
Five9	Input your Five9 Auth Key, Auth Secret Key, and S3 Bucket Link (not sure? Ask your Five9 rep) and select the Salesforce API field name your organization uses for your call outcome (e.g. Call_Recording__c)
FrontSpin	Select the Salesforce API field name your organization uses for your call outcome (e.g. Call_Recording__c)
Fuze	Select the Salesforce API field name your organization uses for your call outcome (e.g. Call_Recording__c)
Generic S3 Dialer	Select the Salesforce API field name your organization uses for your call outcome (e.g. Call_Recording__c)
Genesys Pureconnect	Input your Genesys log in credentials and select the Salesforce API field name your organization uses for your call outcome (e.g. Call_Recording__c)
Groove	Select the Salesforce API field name your organization uses for your call outcome (e.g. Call_Recording__c)
Hubspot Dialer	Leave the "Call Disposition" field blank.
InsideSales.com (XANT)	Input your InsideSales Auth Key, Auth Secret Key, and S3 Bucket Link (not sure? Ask your InsideSales rep) and select the Salesforce API field name your call outcome (e.g. Call_Recording__c)

Dialer Name	Directions
InsideSales Playbook (XANT Playbook)	Input your InsideSales Playbook API Key (not sure? Ask your InsideSales Playbook rep) and select the Salesforce API field name your organization uses for your call outcome (e.g. Call_Recording__c)
MixMax Dialer	Select the Salesforce API field name your organization uses for your call outcome (e.g. Call_Recording__c)
NewVoice Media	Input your NewVoiceMedia Username, Password, and Region and select the Salesforce API field name your organization uses for your call outcome (e.g. Call_Recording__c)
Orum	Select the Salesforce API field name your organization uses for your call outcome (e.g. Call_Recording__c)
Outreach	Select the Salesforce API field name your organization uses for your call outcome (e.g. Call_Recording__c)
RingCentral	Select the Salesforce API field name your organization uses for your call outcome (e.g. Call_Recording__c)
Salesforce Lightning Dialer	Select the Salesforce API field name your organization uses for your call outcome (e.g. Call_Recording__c)
SalesLoft	Select the Salesforce API field name your organization uses for your call outcome (e.g. Call_Recording__c)
Shoretel	Input your Shoretel Username and Password and select the Salesforce API field name your organization uses for your call outcome (e.g. Call_Recording__c)
Talkdesk	Input your Talkdesk Username and Password and select the Salesforce API field name your organization uses for your call outcome (e.g. Call_Recording__c)
Truly	Input your Truly Auth ID and Auth Secret Key (not sure? Ask your Truly rep) and select the Salesforce API field name your organization uses for your call outcome (e.g. Call_Recording__c)
RingCentral for HubSpot	Select the HubSpot API field name your organization uses for your call outcome (e.g. Call_Recording__c)
RingDNA S3	Select the Salesforce API field name your organization uses for your call outcome (e.g. Call_Recording__c)
Zendesk Talk	Input your Username, Password and Domain
Zoom Phone	See this section for Zoom Phone integration

4. Click **Sync Dialer** to complete the process.

5. Once connected, Chorus will import your dialer calls from the Call Recording URL located on the Call Task.

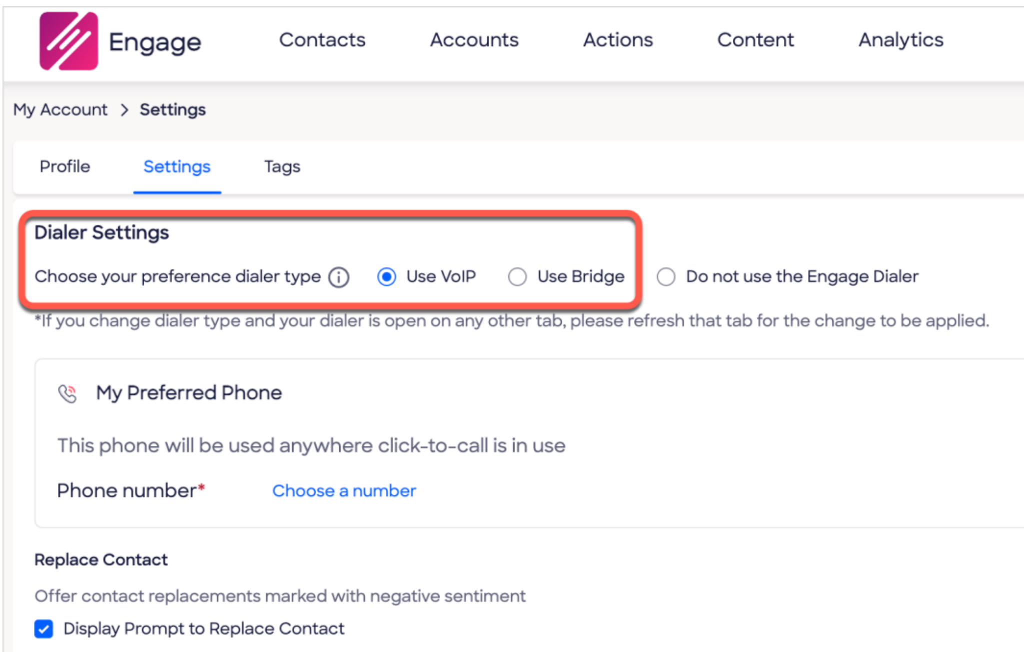
Engage Dialer integration with Chorus

To integrate the ZoomInfo Engage Dialer with Chorus follow these steps:

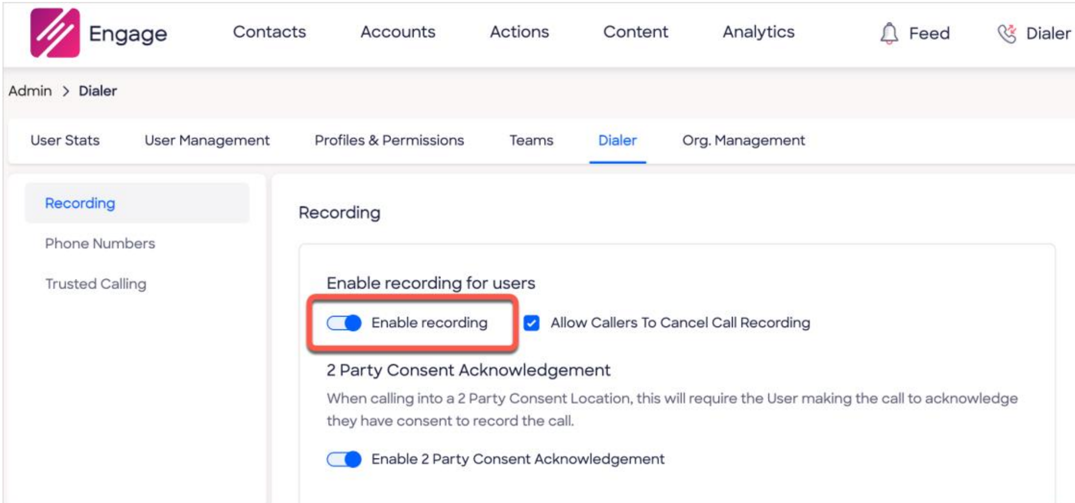
1. In Engage, each user must connect to the Engage Dialer by navigating to **My Account > Settings > Dialer Settings**.

2. Choose to **Use VoIP** or **Use Bridge**.

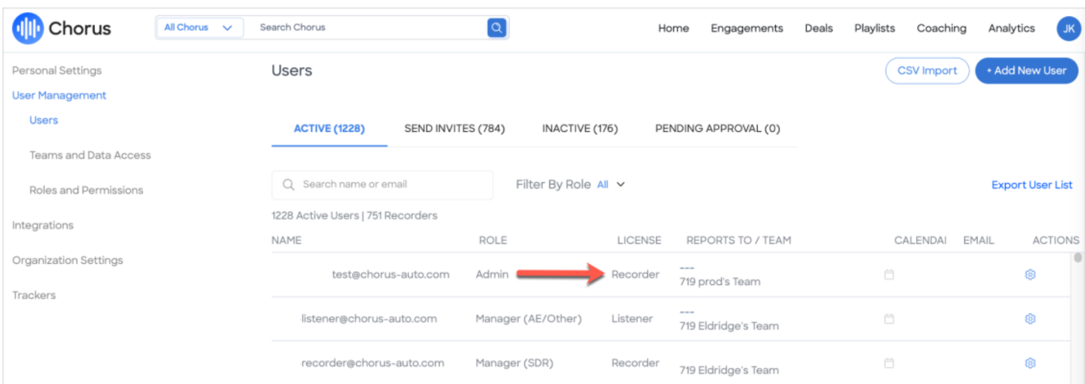
3. Follow the prompts to complete the Engage Dialer setup.



4. The Engage Admin must ensure that **Enable Recording** is toggled on in Engage. **Admin > Dialer > Enable Recording**.



5. In Chorus, the Chorus Admin must ensure that users have a **Recorder License**.



With these steps in place Chorus will ingest calls recorded by the Engage Dialer. For additional assistance, contact your ZoomInfo CSM or open a ticket directly with Chorus Support.

Zoom Phone integration with Chorus

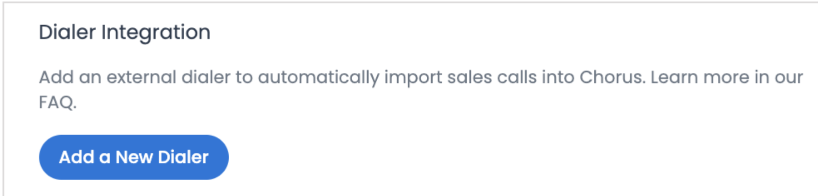
Prerequisites:

- The Zoom phone API requires a Business or Enterprise Zoom account. If you do not have a Business or Enterprise account, Chorus will be unable to pull in calls.
- You need to be an administrator in both Zoom and Chorus to complete this integration.
- This integration is for Salesforce only no other CRMs are supported at this time.

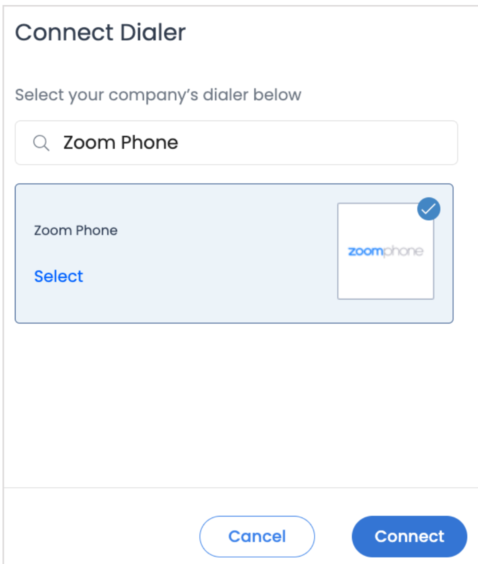
Integrate Zoom Phone with Chorus with these steps:

In Chorus:

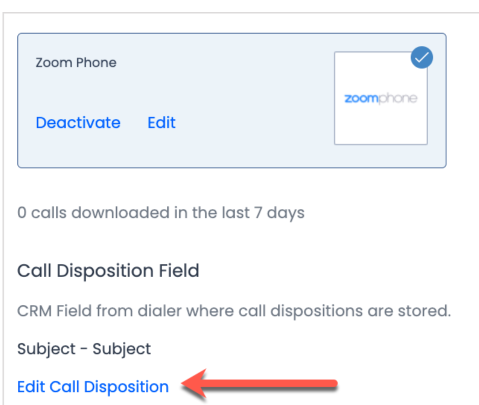
1. Navigate to **Settings > Integrations** then scroll to and click **Add a New Dialer**.



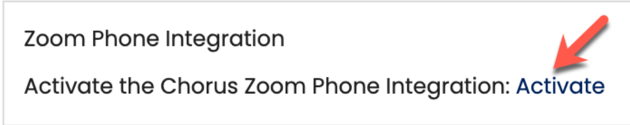
2. Search for **Zoom Phone** in the Connect Dialer search box.
3. Click **Select** for Zoom Phone.
4. Click **Connect**.



5. For Salesforce, under **Call Disposition Field** click **Edit Call Disposition** and select the Salesforce API field name your organization uses to log your call outcome (e.g. Call_Recording__c). If you do not have a field for this, leave this drop down blank.



6. Click **Complete**.
7. While still in Chorus Integrations, scroll to **Zoom Phone Integration** and click **Activate**.



Additional information about Zoom Phone for Chorus can be found in [this Zoom article](#).

In Zoom:

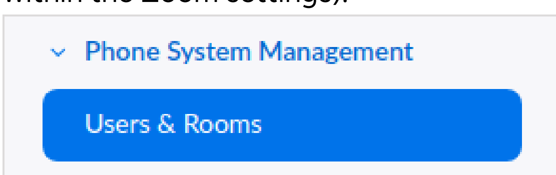
The steps in this guide will affect the Zoom settings for your entire organization. However, if you choose to have group-specific settings, see the following documentation for how to set-up groups within Zoom: [Managing User Groups](#)

Prerequisites:

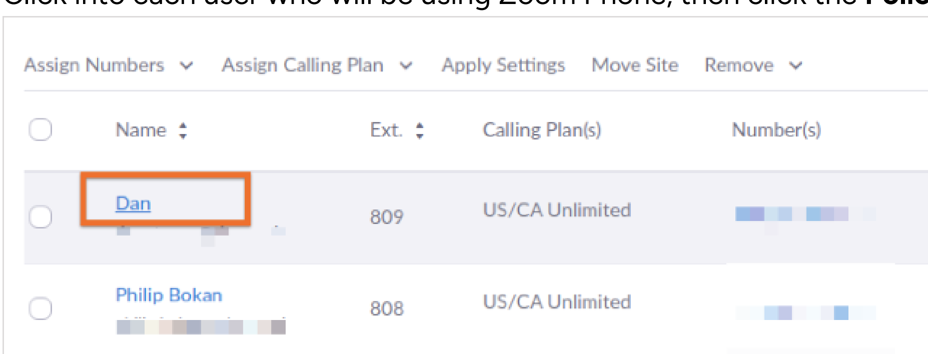
- Your organization must use Salesforce and have already set up the 1-click Chorus-Salesforce sync.
- Your organization must be on a Business or Enterprise account with a Zoom Phone plan (Metered, Unlimited, or Pro).
- Ensure the Zoom admin also has a Chorus.ai admin license. The integration requires that the person doing the set up has the proper credentials for both Zoom and Chorus.

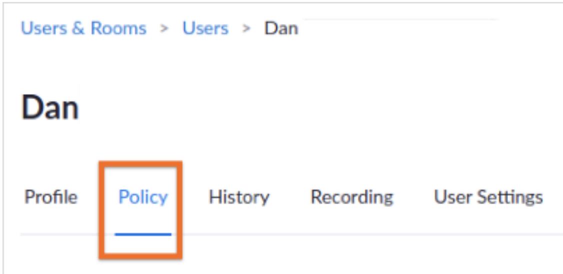
How it works (admins)

1. Zoom Phone must be enabled for each user individually within your organization.
2. Navigate to the **Phone System Management** section in your Zoom settings and select **Users & Rooms**. (Note: The Users & Rooms section is separate from other user management sections within the Zoom settings).

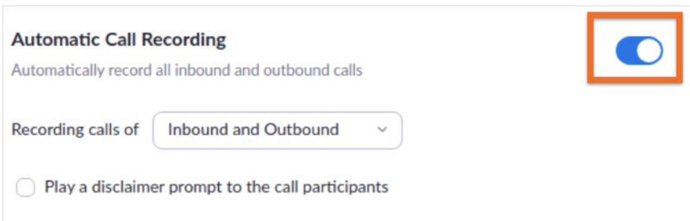


3. Click into each user who will be using Zoom Phone, then click the **Policy** tab.





4. On the Policy tab for each user, enable **Automatic Call Recording for Inbound and Outbound calls**. Doing this will allow all inbound and outbound calls to be recorded by Zoom and be uploaded by Chorus.



5. Once enabled, the Play a disclaimer prompt to the call participants will trigger an audio notification to play at the start of both inbound and outbound calls letting participants know the call is being recorded.

Recommended: This setting can be disabled by unchecking the box.