

Crelate Integration Guide for ZoomInfo Talent

For administrators setting up the ZoomInfo Talent integration with Crelate

Obtain the API Key from Crelate	2
Configure the Connection	3
Configure Integration Settings	4
Configure Export Preferences	5
Configure Custom Mapping	6
View and Manage Connected Integrations	9
Enable User Connections	9
Connect as a User	9

ZoomInfo Talent helps recruiters find, organize, and connect with the right candidates using ZoomInfo's data. An admin can connect the Crelate integration to enable their organization's recruiters to export candidates and manage them in Crelate.

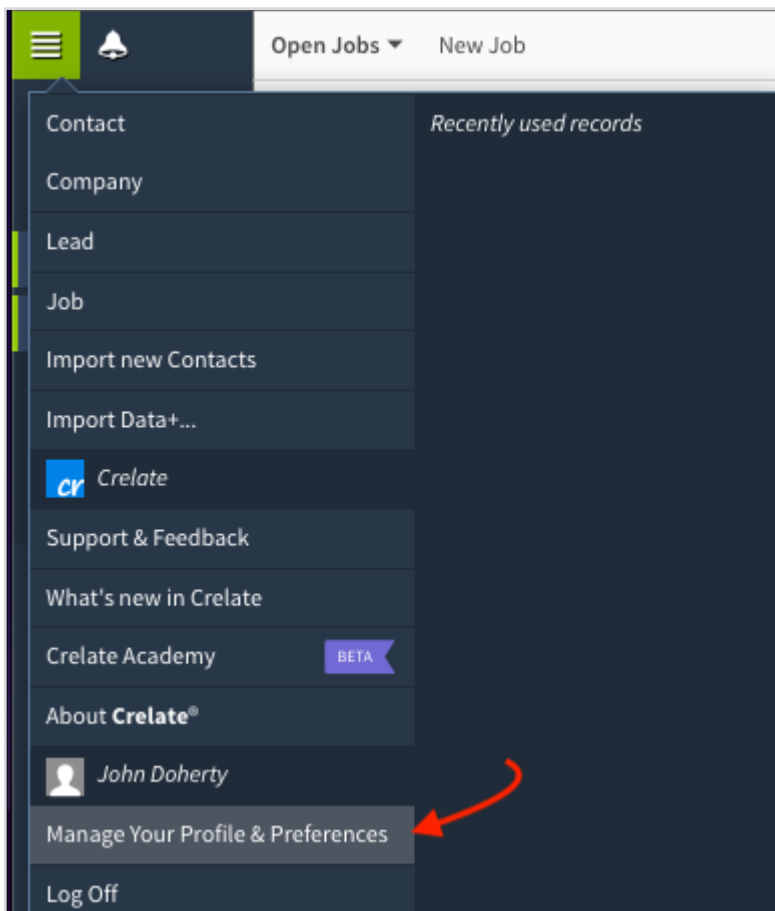
To get connected:

1. A ZoomInfo Talent admin establishes the connection to Crelate using an API key and configures export and custom mapping settings for their organization.
2. The admin enables their organization's users to connect to Crelate.
3. Users connect to Crelate using their own API key can begin exporting candidates. See [Connect Users](#).

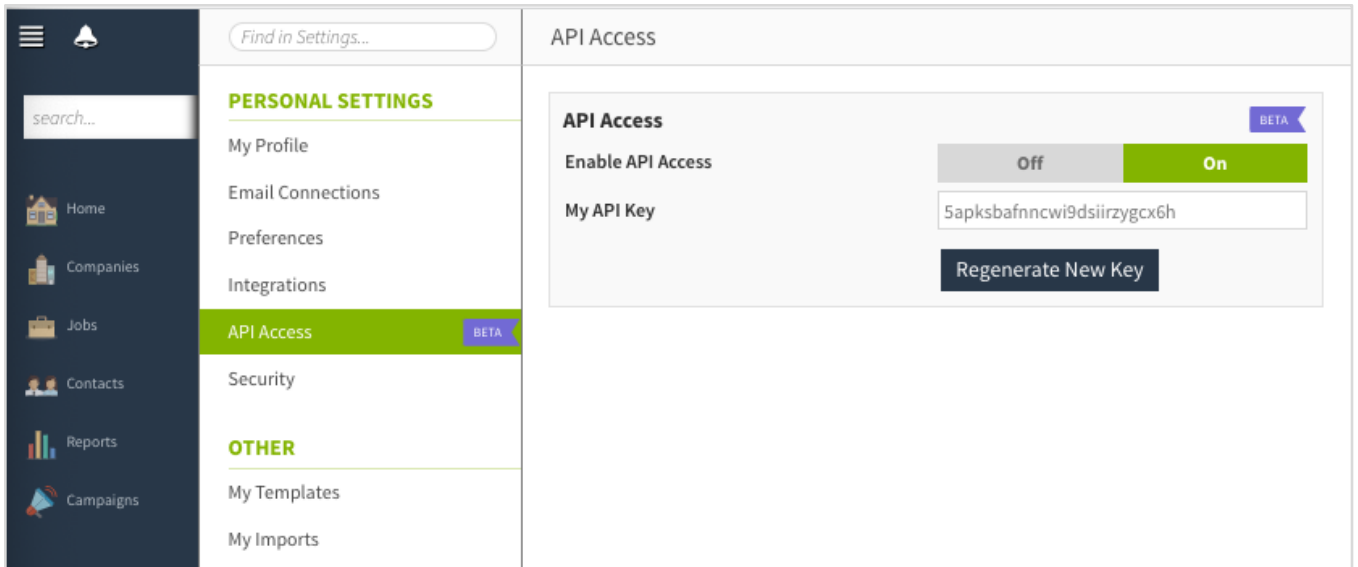
Obtain the API Key from Crelate

To get connected, a user with admin permissions to Crelate must first obtain an API key by following [these instructions](#).

1. In Crelate, click the menu on the top left and click **Manage Your Profile & Preferences**.



2. Under **Personal Settings**, click **API Access**.

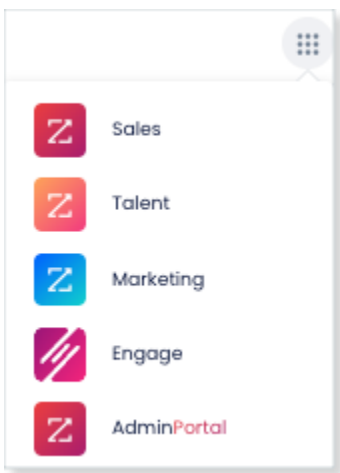


3. Ensure the **Enable API Access** toggle is set to **On** and copy the API key shown in **My API Key**.

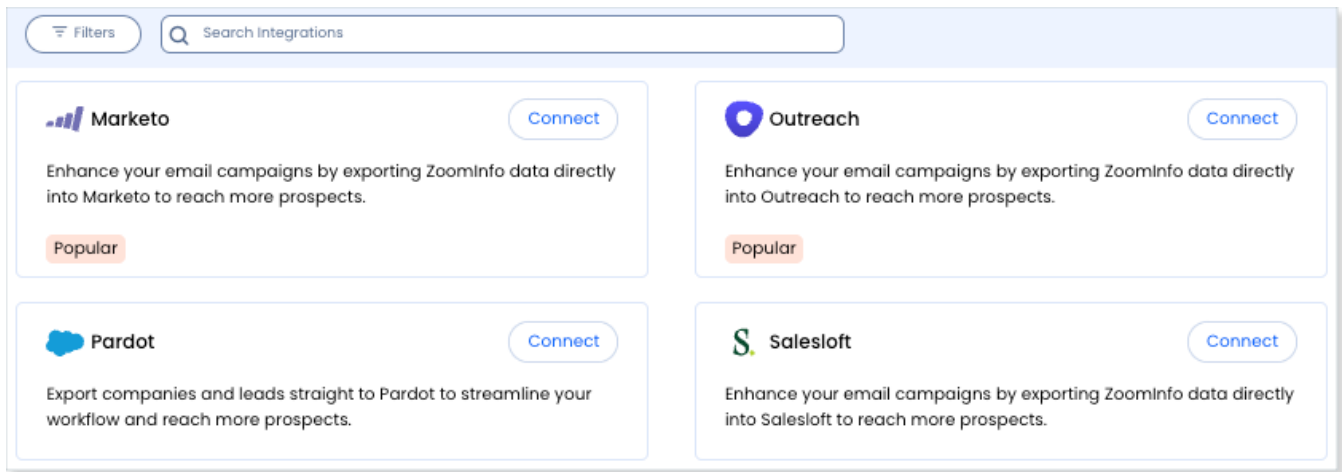
Configure the Connection

With the API key in hand, and using the same Crelate admin email address used to obtain the key:

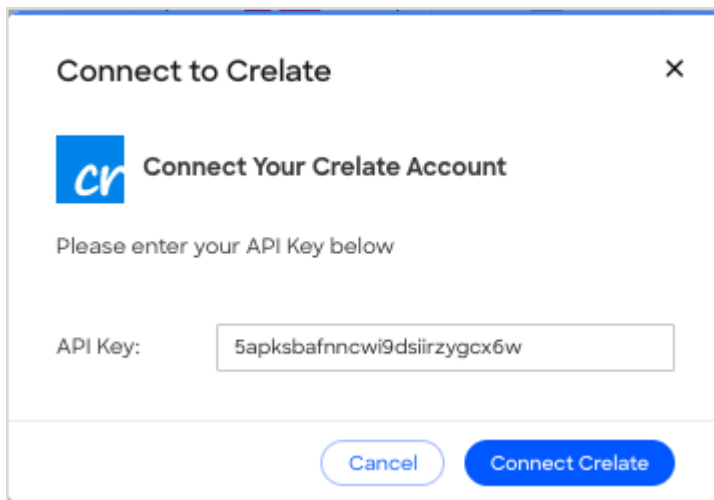
1. Login to ZoomInfo and select **Admin Portal** from the waffle menu.



2. Click **Integrations**.



3. Use the **Filters**, or **Search integrations** options to find your integration.
4. On the tile for your integration, click **Connect**.
5. Paste your **API Key**.



6. Click **Connect Crelate**.

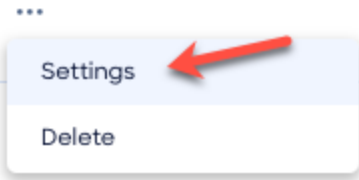
Configure Integration Settings

Once your integration is connected, you can configure the settings, including export preferences and mapping:

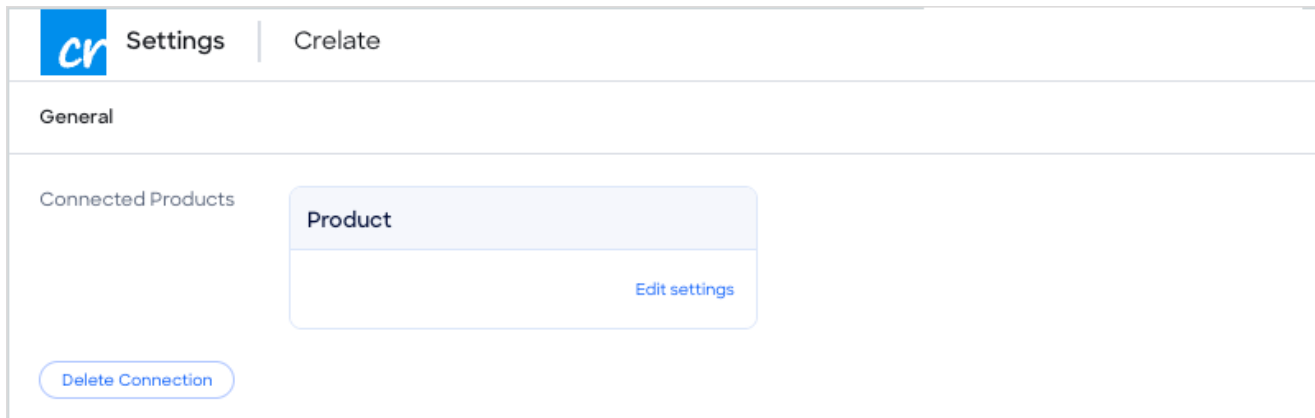
To access the **Settings** page for your integration:

- Click **Edit Settings** from the connection success message.
- If you've already closed the connection success message, navigate to the **Connected** tab and click ... > **Settings** in the **Action** column.

Actions



The **Settings** page displays.

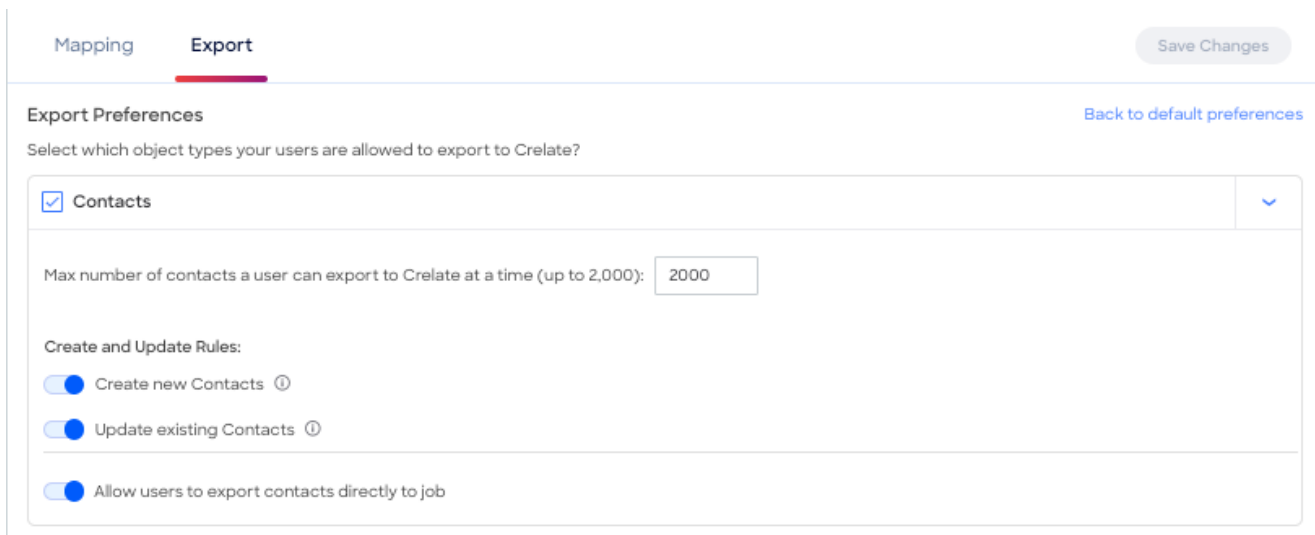


From this page, click **Edit settings** to begin configuring your integration.

Configure Export Preferences

ZoomInfo admins can configure export preferences and limit the objects that can be exported:

1. Click the **Export** tab.
2. Select the export options for exporting ZoomInfo contacts to Crelate as Contacts.



Note: You can adjust the maximum number of records a user can export.

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

Configure Custom Mapping

Click the **Mapping** tab.


ZoomInfo Field	Crelate Field	Example	Update Option
* First Name	First Name	e.g. Hila	Complete if mi...
* Supplemental Email	Personal Email	-	Complete if mi...
Last Name	Last Name	e.g. Nir	Complete if mi...
Email Address	Work Email	e.g. hila.nir@zoominfo.com	Complete if mi...
Mobile Phone Number	Mobile Phone	-	Complete if mi...
Direct Phone	Work Phone	e.g. (617) 500-4900	Complete if mi...

On the **Mapping** tab, use the **Contacts** tab to review the default mapping and make any changes.

Field	Description
ZoomInfo Field	Available ZoomInfo fields. Required fields are marked with an asterisk (*).
Crelate Field	Available Crelate fields. These fields are retrieved directly from your Crelate instance.
Update Options	Select an option: <ul style="list-style-type: none"> Complete if missing (default) - Only complete with ZoomInfo data if none exists in Crelate. Overwrite field - Overwrite existing data in Crelate with ZoomInfo data.

Add or Remove Fields

Add fields by clicking **Add Row** at the bottom of the field list. Each field that you add must be mapped to a corresponding field in your integration.

Click the  trash icon to remove any fields that you do not want to map.

Personal Phone and Email Mapping

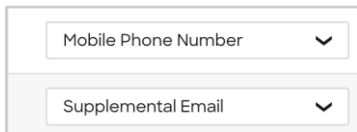
The default mapping for the Crelate integration for ZoomInfo Talent is specific to talent acquisition use cases. For example, the phone and email mappings for contacts are focused on personal contact information instead of business contact information.

In ZoomInfo:

- A contact's business email address is stored in the **Email Address** field, and the personal address is stored in the **Supplemental Email** field.
- A contact's business phone number is stored in the **Phone** field, and the personal phone number is stored in the **Mobile Phone Number** field.

In ZoomInfo Talent:

Because recruiters typically want to engage with candidates through personal channels, we have included the **Mobile Phone Number** and **Supplemental Email** fields in the default mapping.



The image shows a screenshot of a user interface for field selection. It contains two dropdown menus stacked vertically. The top dropdown menu is labeled 'Mobile Phone Number' and has a downward-pointing chevron icon. The bottom dropdown menu is labeled 'Supplemental Email' and also has a downward-pointing chevron icon.

If you want to also map the business email and phone number, you can click **Add Row** and map the ZoomInfo **Email Address** and **Phone** fields to corresponding fields in your integration.

Set a Hierarchy for ZoomInfo Data Within a Single Crelate Field

In some cases, you may want multiple ZoomInfo fields to be stacked hierarchically within a single Crelate field. For example, you want to import the ZoomInfo **Supplemental Email** (personal) and **Email Address** (business) fields into the Crelate **Email Address** field.



The image shows a screenshot of a field mapping interface. It consists of two rows of mapping. The first row shows a dropdown menu labeled 'Supplemental Email' with a downward chevron, followed by a right-pointing arrow, and then a dropdown menu labeled '1 Email' with a downward chevron. The second row shows a dropdown menu labeled 'Email Address' with a downward chevron, followed by a right-pointing arrow, and then a dropdown menu labeled '2 Email' with a downward chevron.

In this example:

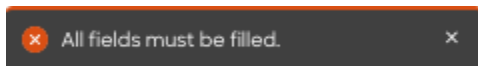
- When contacts are exported to Crelate, **Supplemental Email** will map to **Email**.
- If a contact has both a **Supplemental Email** address and business **Email Address** in ZoomInfo, the first occurrence of the Crelate field will be denoted with number 1, and the second will be number 2.
- If a specific contact does not have a **Supplemental Email** in ZoomInfo, we will send the business **Email Address** field to the **Email** field in Crelate.

Test and Save

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

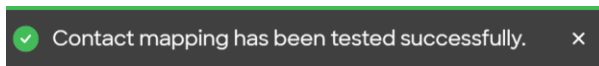


- If the test record cannot be created, this is typically due to an error in the mapping settings. For example, mappings cannot be saved with a blank field.



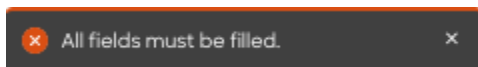
Adjust the settings and click **Test Mapping** again.

- If the test is successful, a notification displays.



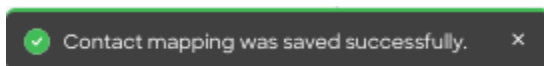
After performing a successful test mapping, click **Save Changes**.

- 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.







View and Manage Connected Integrations

Once you've connected one or more integrations, you can view and manage them on the **Connected** tab of the **Admin Portal > Integrations** page.

Connected 19 All Integrations + New Integration

To maximize your experience, ZoomInfo now connects with the apps and products your organization is already using. Search, add, and manage your integrations here.

Integration Name	Date Connected	Category	Actions
<input checked="" type="checkbox"/>  PC Recruiter	Jun 13, 2022	ATS	...
<input checked="" type="checkbox"/>  Salesloft	Oct 10, 2022	Sales/Marketing	...
<input checked="" type="checkbox"/>  HubSpot	Oct 31, 2022	CRM	...
<input checked="" type="checkbox"/>  Salesforce	Dec 2, 2022	CRM	...

On this page, you can:

1. Use the toggle to turn an integration on or off for users in your organization. Toggling an integration to off does not affect the mapping and export settings you've configured.
2. Update the settings for an integration by clicking the integration name, or by clicking ... > **Settings** in the **Action** column.
3. Delete a connected integration (including any mapping and export settings you've configured) by clicking ... > **Delete** in the **Action** column.

Enable User Connections

To enable users to connect:

1. Add your organization's users under **Admin Portal > User Management**.
2. Under **Admin Portal > Integrations**, enable the toggle on the Crelate integration.

Each user can now connect to Crelate with their own credentials.

Connect as a User

Once the ZoomInfo admin has 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 Crelate.

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