Engage Implementation Guide

For administrators setting up ZoomInfo Engage

ZoomInfo Engage is a sales engagement platform designed to help maximize your sales teams' productivity, increase effective communications, and streamline your tech stack so your team can close more deals. Engage is a one-stop experience that combines data insights and intelligence, communications, and CRM tracking all in one convenient location.

Intended Audience

This guide is intended for ZoomInfo Engage administrators tasked with setting up Engage and associated integrations for themselves and users in their organization. Included in this document are details to provide to users to enable them to successfully connect and use Engage.

Getting Started

Getting started with Engage includes the following steps:

1. **Connect Engage users through ZoomInfo Sales**: A ZoomInfo Sales administrator in your organization connects Engage users through the ZoomInfo Sales Admin Portal.

2. **Welcome to Engage**: An administrator in your organization is designated as the "first one in", establishing their own connection to Engage. This admin provides their contact details, credentials to connect a supported cloud-based email server, and CRM (if used).

3. **Add users in Engage**: The admin adds users to their Engage instance, designating them as either Administrators or Contributors. As each user is added, they are invited by email to log in to Engage, establish a password, and walk through the setup wizard to provide account profile details, dialer setup, email server integration, calendar link, and CRM integration (if used).

4. **Enable your organization's users**: From Engage, each user can check and update the details they provided (or skipped) when they ran the setup wizard. Users can update their account profile and settings, dialer setup, email server integration and CRM integration. Users can also install the Engage Chrome extension.

Connecting Engage users through ZoomInfo Sales

Connecting Engage users is done through the ZoomInfo Sales Admin Portal by a ZoomInfo Sales admin.

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

2. From the left menu, select **User Management** and search for the first user to be connected to Engage. (Typically the admin is the first user.)

3. Click into the user row to open the user profile.

4. Next to **Subscription** use the dropdown to check the box for **Engage Bundle**.

5. Click **Save**.

6. Repeat this process for additional users. See [Add New Users in Engage](#) in this guide.

The user will now see the Engage tile when they click the waffle menu. (Users may need to log out and log back in to see the Engage tile.)

Welcome to Engage

A designated Engage administrator will receive a welcome email with a link to get started with creating the initial connection with Engage for their organization.

1. Log in to ZoomInfo and click the **Engage** tile in the waffle menu.
2. Click **Next** and follow the onboarding wizard, providing the following details:

Field	Description
Contact Details	Name, phone number, email address, job title and company.
Email Integration Setup	Connect to a supported cloud-based email server (Google or Microsoft Office 365) and configure email alert frequency settings.
Integration Setup	**Salesforce**: If your organization uses Salesforce, connect to Salesforce using your Salesforce credentials and configure the integration for your organization's users. For details, see the *Salesforce Integration Guide for Engage*. **HubSpot**: If your organization uses HubSpot, connect to HubSpot using your HubSpot credentials and configure the integration for your organization's users. For details, see the *Hubspot Integration Guide for Engage*. **Microsoft Dynamics**: If your organization uses Microsoft Dynamics connect to Microsoft Dynamics using your Microsoft Dynamics credentials and configure the integration for your organization's users. For details, see the *Microsoft Dynamics Integration Guide for Engage*.
Recommendations	Enter the criteria for your target contacts and we will offer recommendations based on your input values.
Email Signature & Calendar Link	Choose a predefined email signature template, create your own signature, or copy and paste your main signature. Also add your third-party calendar link for prospects to book meetings with you.
Dialer Setup	If using the Dialer, choose whether to use the Bridge (which utilizes your mobile or desk phone number), VoIP which lets you select an outbound phone number with an area code you choose, or both.
Verify & Set Timezone	Set your timezone and culture.

Note: When running the wizard, you can choose to skip providing details that are not required and configure them later in your Engage account settings.

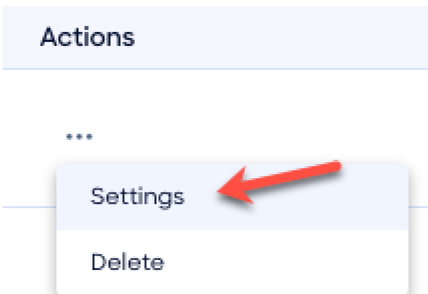
3. Click **Let's Get Started** to enter the Engage dashboard.

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.



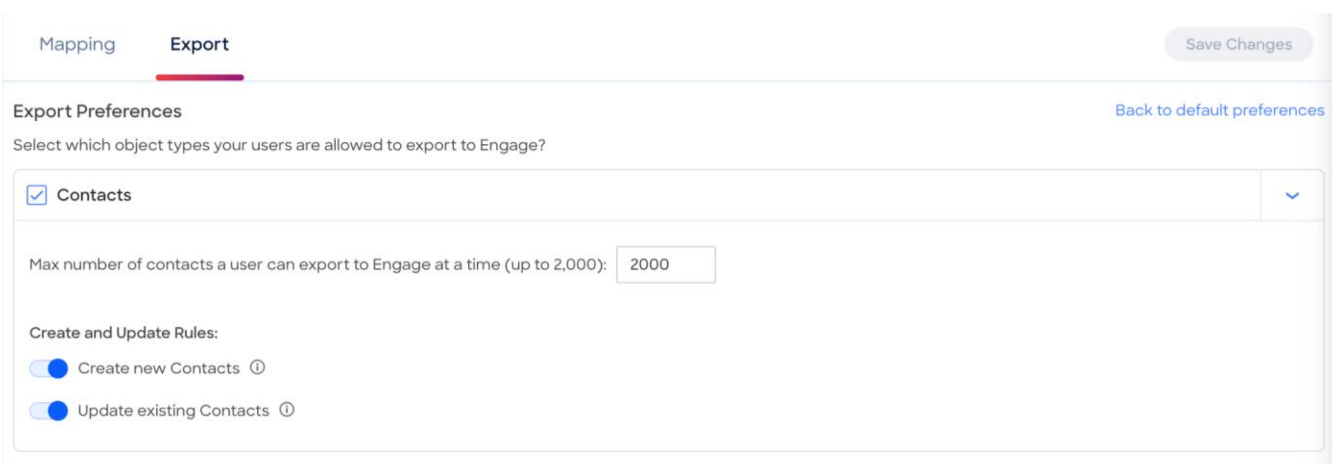
The **Settings** page displays.

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

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 records to Engage.

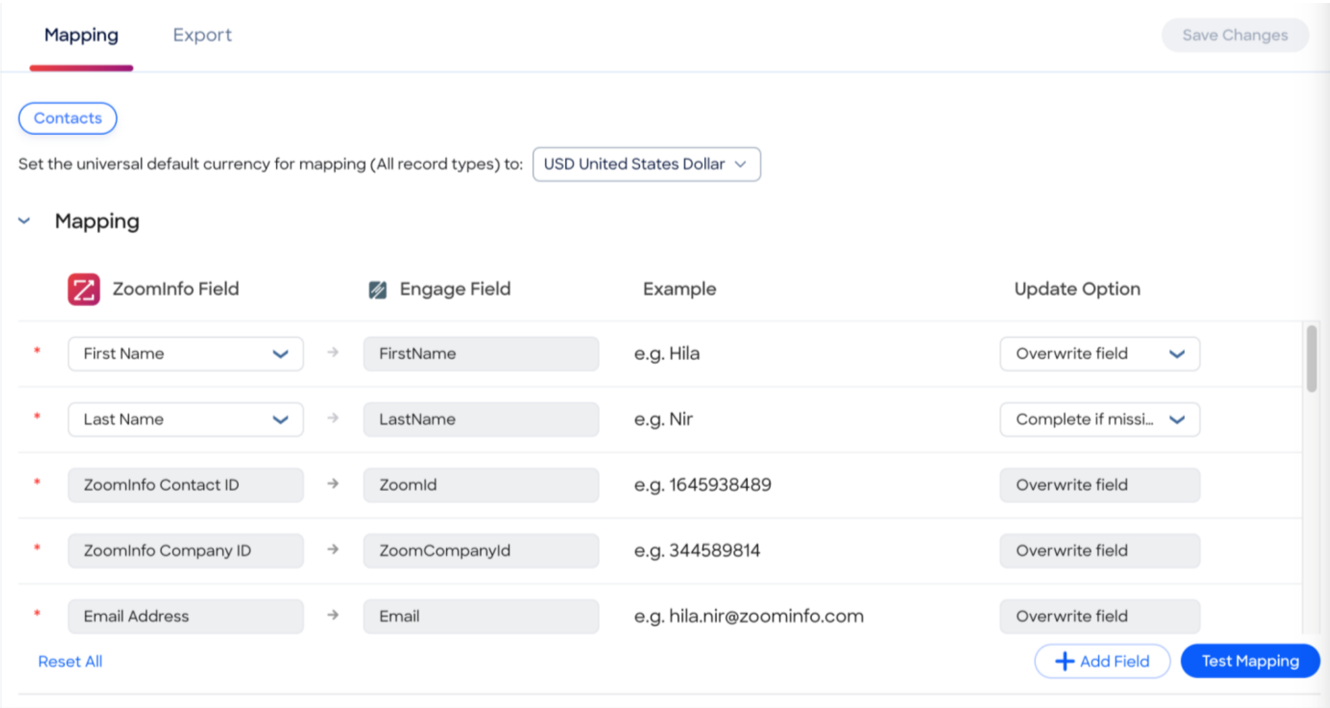


Note: You can adjust the maximum number of records a user can export.

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

Custom Mapping

Click the **Mapping** tab.



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

Field	Description
ZoomInfo Field	Available ZoomInfo fields. Required fields are marked with an asterisk (*).
Engage Field	Available Engage fields. These fields are retrieved directly from your Engage instance.
Update Options	Select an option: • **Complete if missing** (default) - Only complete with ZoomInfo data if none exists in Engage. • **Overwrite field** - Overwrite existing data in Engage 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.

Set a Hierarchy for ZoomInfo Data Within a Single Engage Field

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

In this example:

- When contacts are exported to Engage, **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 Engage 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 Engage.

Test and Save

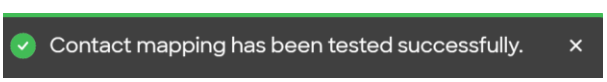
Before saving your mapping changes, click **Test Mapping** to export and delete a test record using your current settings.

- 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.

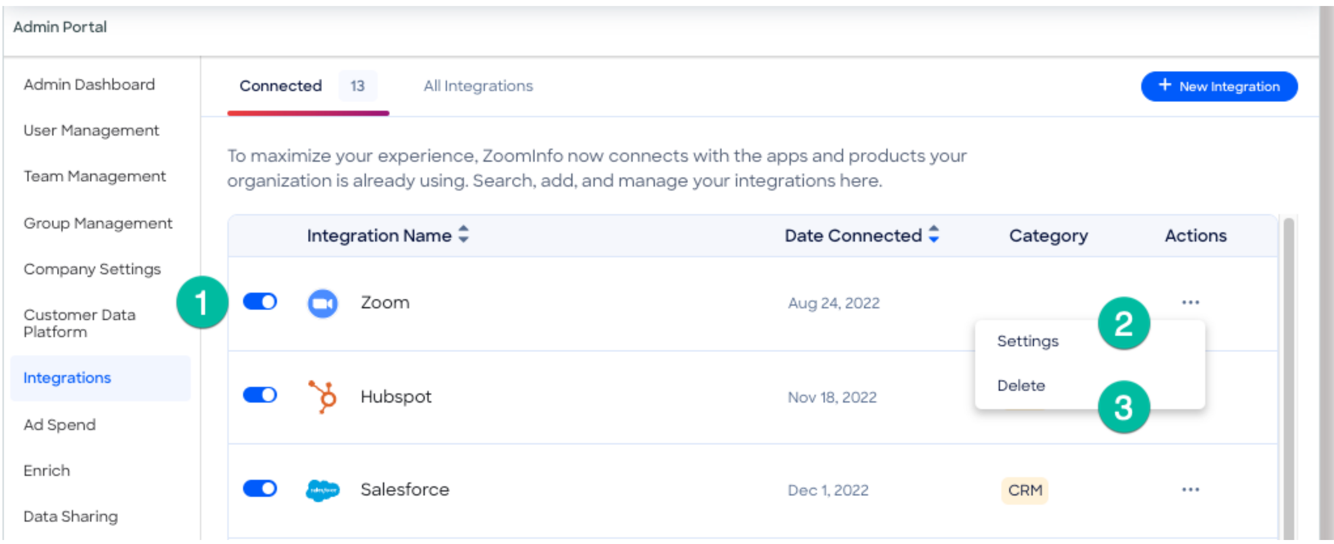
  

  Remove any unfilled rows and click **Save Changes** again.

- 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.

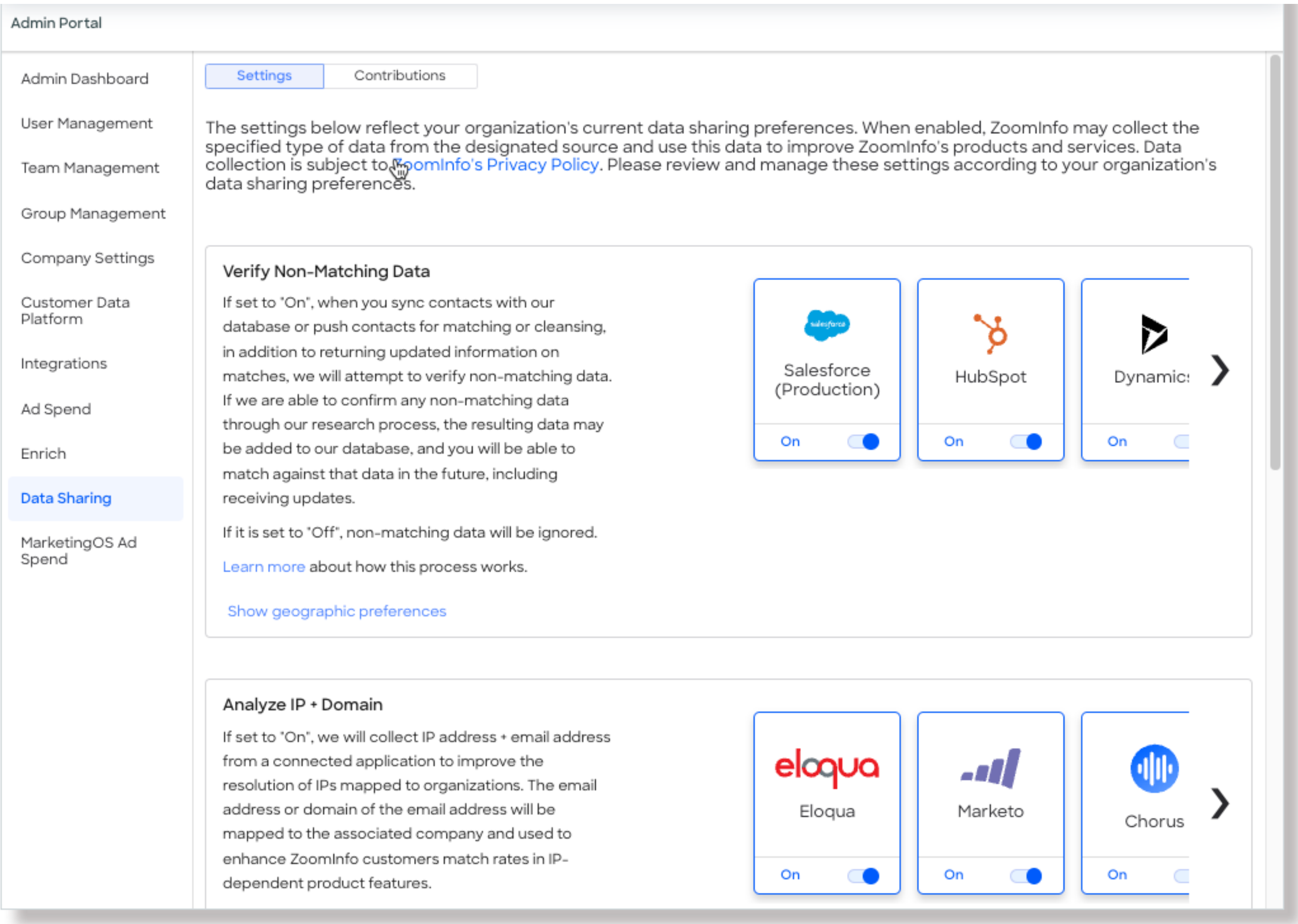


On this page, you can:

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.

Data Sharing

The Data Sharing page in the Admin Portal is enabled if your organization has not contractually opted out of data sharing with ZoomInfo that is intended to analyze your use of connected integrations. Data sharing helps to improve the ZoomInfo service and make recommendations to you.



1. Go to **Admin Portal > Data Sharing**.
    - If your organization has chosen to opt-out of data sharing, the following message displays:

      As a precaution, this function is set to OFF and is not editable, in order to prevent unintended changes that may be in conflict with your organization's contractual terms.

    - If your organization has not opted out of data sharing, the **Data Sharing** page displays with the ON/OFF toggles enabled.
2. Data collection is subject to ZoomInfo's Privacy Policy. Review the policy details using the link provided.
3. Review and manage the data sharing settings according to your organization's data sharing preferences.
4. Over time, you can review the **Contributions** tab to monitor the contributions made by your organization.

Connect Users

Once you have enabled the Engage integration as an admin, you can turn on the integration for users in your organization.

Note: You will add these users within Engage (through ZoomInfo Sales) later in the process. Once they have successfully logged in to Engage, you will direct them back to ZoomInfo Sales to enable their individual ZoomInfo Sales to Engage connection.

1. Go to **Admin Portal > Integrations**.
2. On the **Connected** tab, find **Engage for ZoomInfo Sales**.
3. Enable the toggle.

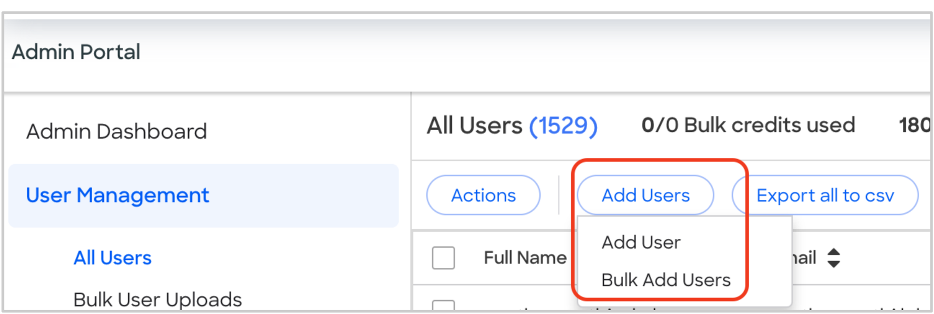
The integration is now enabled for your individual users. Once these users (including other admins in your organization) have successfully been added and logged in to Engage, they can enable exports from ZoomInfo Sales to Engage.

Add New Users in Engage

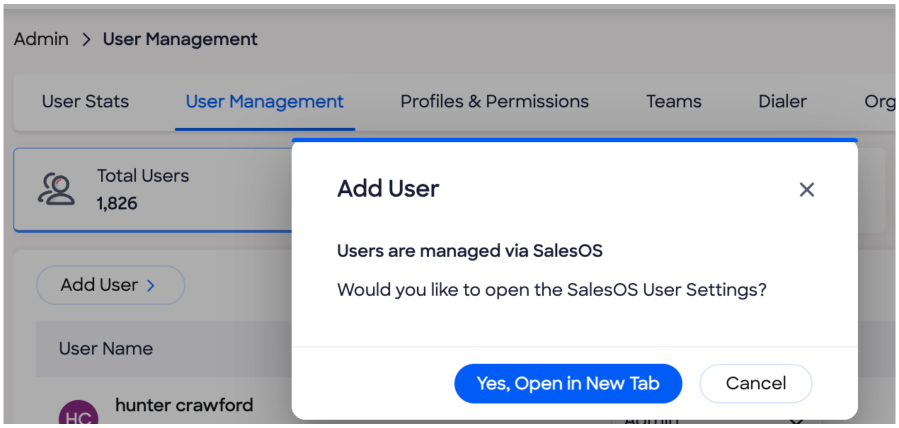
Note: Information about adding users to Engage can be found in this [ZoomInfo article](#).

Add your organization's users as either Administrators or Contributors in Engage. Each user that you add will receive an email inviting them to connect to Engage.

1. Navigate to **Admin Portal** using the waffle menu in the upper right and click **User Management** on the left.
2. Click **Add Users** in the top left of the table.
3. Choose **Add User** or **Bulk Add Users**.



4. **Note**: If you attempt to add new users directly from within Engage you will be redirected to ZoomInfo Sales.



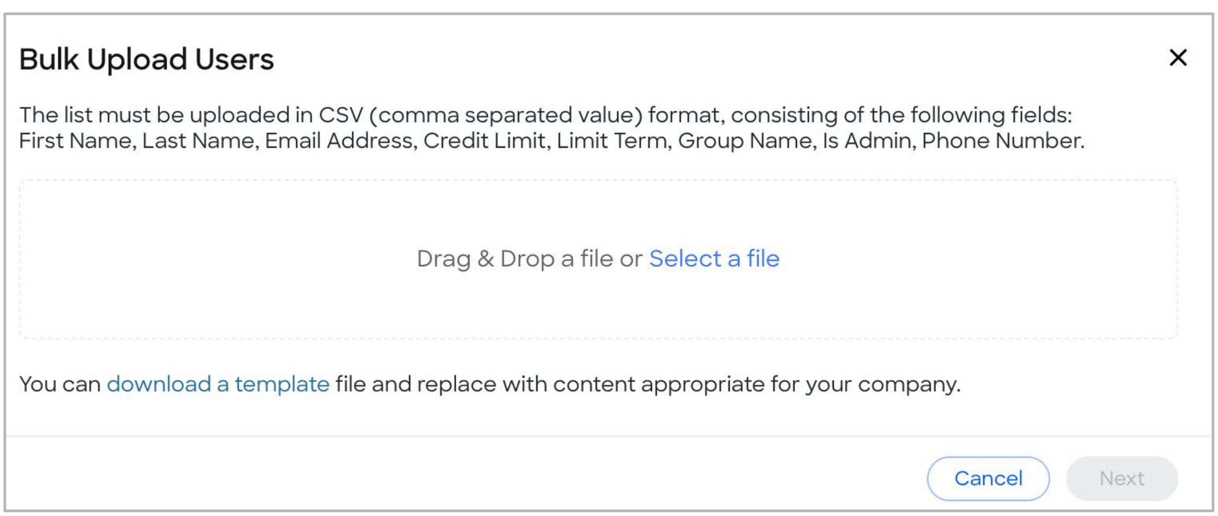
Bulk Add Users

You can expedite setting up users as Administrators or Contributors by bulk importing up to 100 users at a time using a CSV or Excel file.

- The file must contain the following fields: **First Name, Last Name, Email Address, Credit Limit, Limit Term, Group Name, Is Admin, Phone Number**.
- You can optionally include the **Role** field if you want to import a list containing both Administrators and Contributors. Otherwise, you can select the type of role to apply to the entire list of users (Administrator or Contributor) in your file.

Procedure:

1. Navigate to **Admin Portal** using the waffle menu in the upper right and click **User Management** on the left.
2. Click **Add Users** in the top left of the table.
3. Choose **Bulk Add Users**.
4. To get started, you can download a simple user import example CSV file as a starting point for your own file. Click the **download a template** link in the Bulk Upload Users pop-up. (See image below.)



5. The file must contain the following fields and the list of users:

   "First Name","Last Name","Email"

   If your file has a mix of user roles (Administrator and Contributors), add the optional **Role** field:

   "First Name","Last Name","Email","Role"

   Your sample file may look something like this:

   "First Name","Last Name","Email","Role"

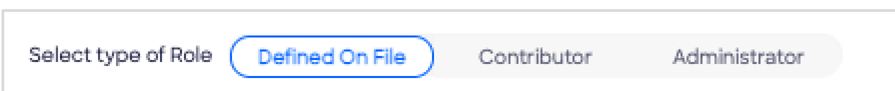
   "Lou","DiPalma","lou.dipalma@email.com","Administrator"

   "Anita","Baker","anita.baker@email.com","Administrator"

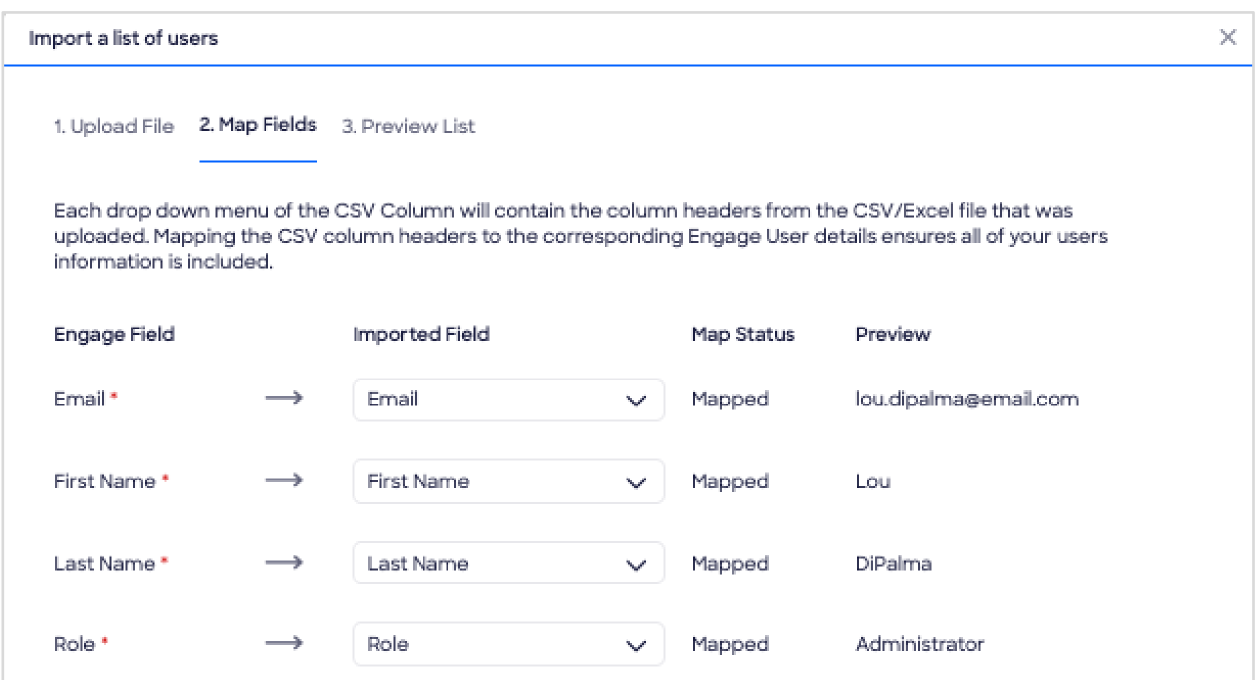
   "Penny","Jackson","penny.jackson@email.com","Contributor"

   "April","Wein","april.wein@email.com","Contributor"

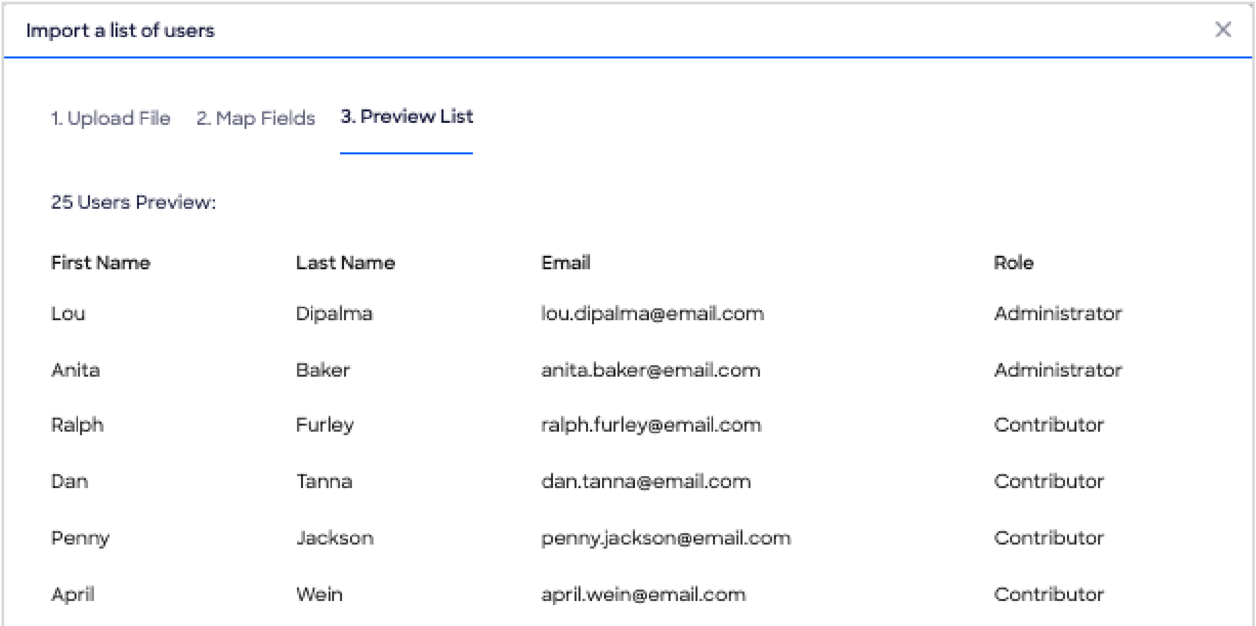
6. Select the type of roles included in the list.
   - If your list of users includes a **Role** field and has a mix of Contributor and Administrator roles, select **Defined on File**.
   - If the list contains users that are all one type of role (Contributor or Administrator), select the corresponding type. If a **Role** field is present, any values in this field are ignored and the users are imported with the role you selected.



7. Drag and drop or browse for your file and click **Next**.



8. Confirm the field mapping and click **Next**.

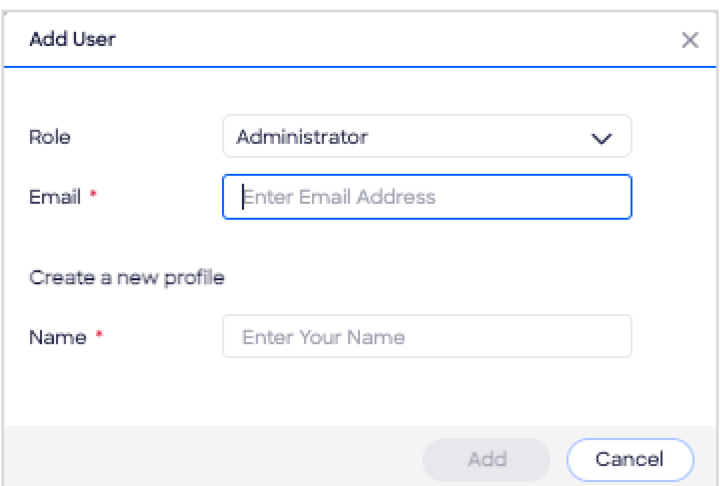


9. Preview the list and click **Import**.

Add a Single User

To add a single user:

1. Click **Add User**. You will be directed to ZoomInfo Sales.



2. Select a **Role** (Administrator or Contributor).
3. Type the user's **Email** and **Name**.
4. Assign to a **Group** if necessary.
5. Decide if this user will be an Admin.
6. Set **Subscription** and **User Credit Limit**.

7. Click **Save**. An email invitation is sent to the user with a link to log in to Engage and establish a password.

Enable Your Organization's Users

To enable your organization's users with Engage, provide the following articles for details on connecting ZoomInfo Sales to Engage, configuring their account settings, and using Engage.

Connect ZoomInfo Sales to Engage: Each user in your organization who has successfully logged in to Engage can now enable exports from ZoomInfo Sales to Engage.

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

Configure Engage account settings: Assuming the user has successfully logged in to Engage, instruct them to review and configure their profile information and settings.

Admins should share the following link with users for instructions on how to set up their user account in Engage.

Using Engage: Admins should share the following link with users for articles on how to use Engage.