Talent

Engage Integration Guide for ZoomInfo Talent

For administrators setting up the ZoomInfo Talent integration with ZoomInfo Engage

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

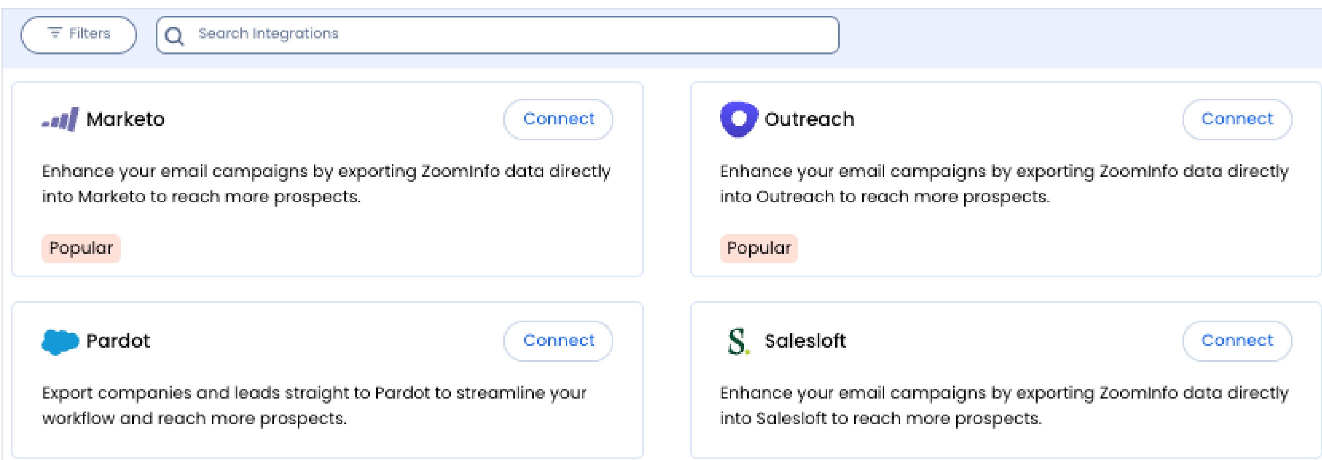
To get connected:

1. A ZoomInfo Talent admin establishes the connection to Engage and configures export and custom mapping settings for their organization.
2. The admin enables their organization's users to connect to Engage.
3. Users connect to Engage using their own credentials and can begin exporting candidates.

Get Connected

A ZoomInfo admin establishes the integration with Engage that enables ZoomInfo Talent users to connect and export data to Engage.

1. Login to ZoomInfo and select **Admin Portal** from the waffle menu.
2. Click **Integrations > Connections** then click the **All Integrations** tab.



3. Use the **Filters**, or **Search integrations** options to find your integration.
4. On the tile for your integration, click **Connect**.
5. Complete the connection using your credentials.

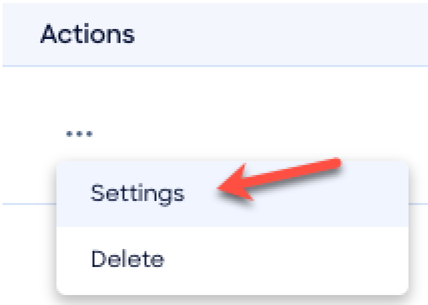
Configure Integration Settings

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

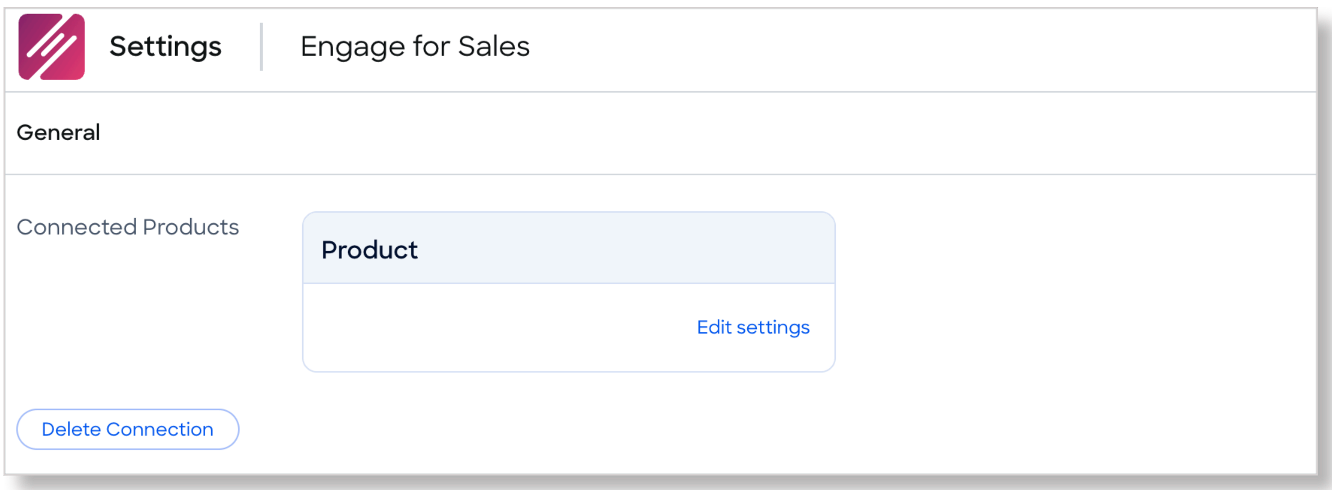
To access the **Settings** page for your integration:

- 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.

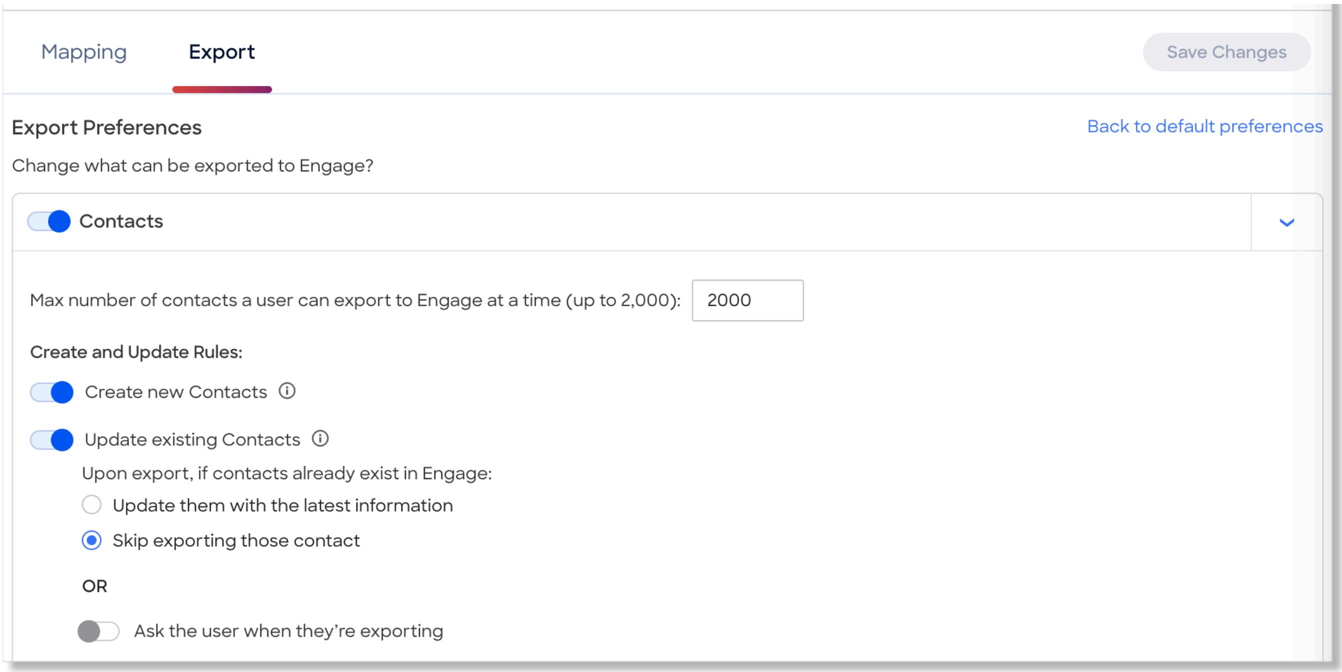


From this page, click **Edit settings** to begin configuring your integration.

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 contacts to Engage.

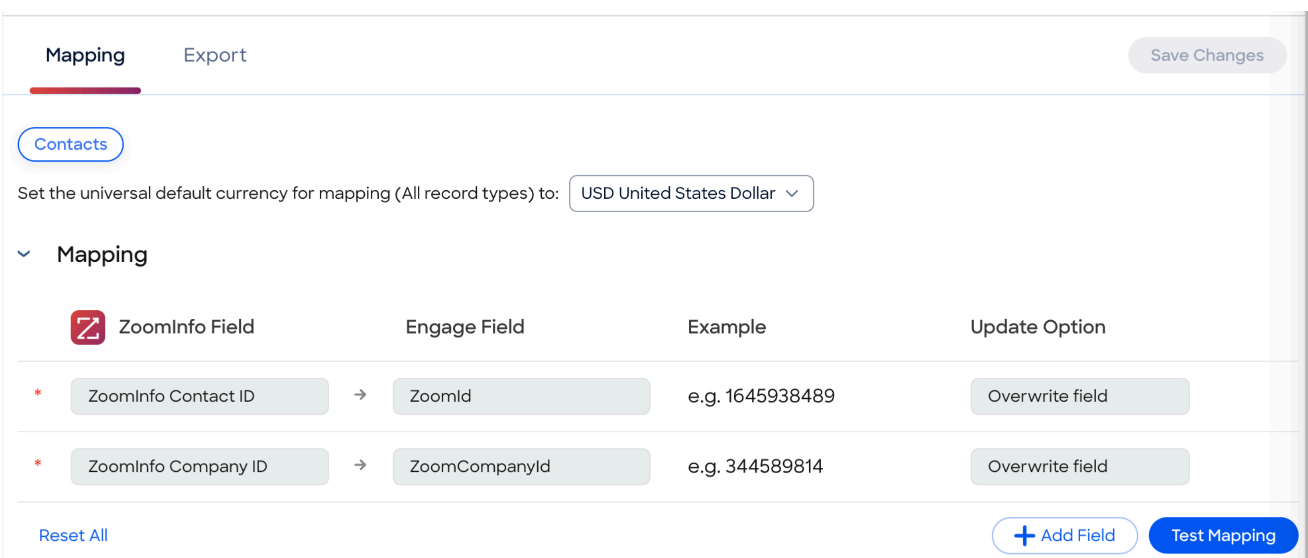


Note: You can adjust the maximum number of records a user can export.

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 mappings 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.

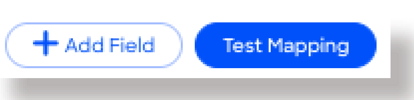
For example, you may want to import both the ZoomInfo Direct Phone and Company Phone fields into the Engage Business Phone field.

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

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

Test and Save

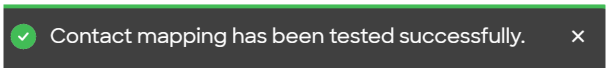
Before saving your mapping changes, click **Test Mapping** to export and delete a test record using your current settings.



- 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**.

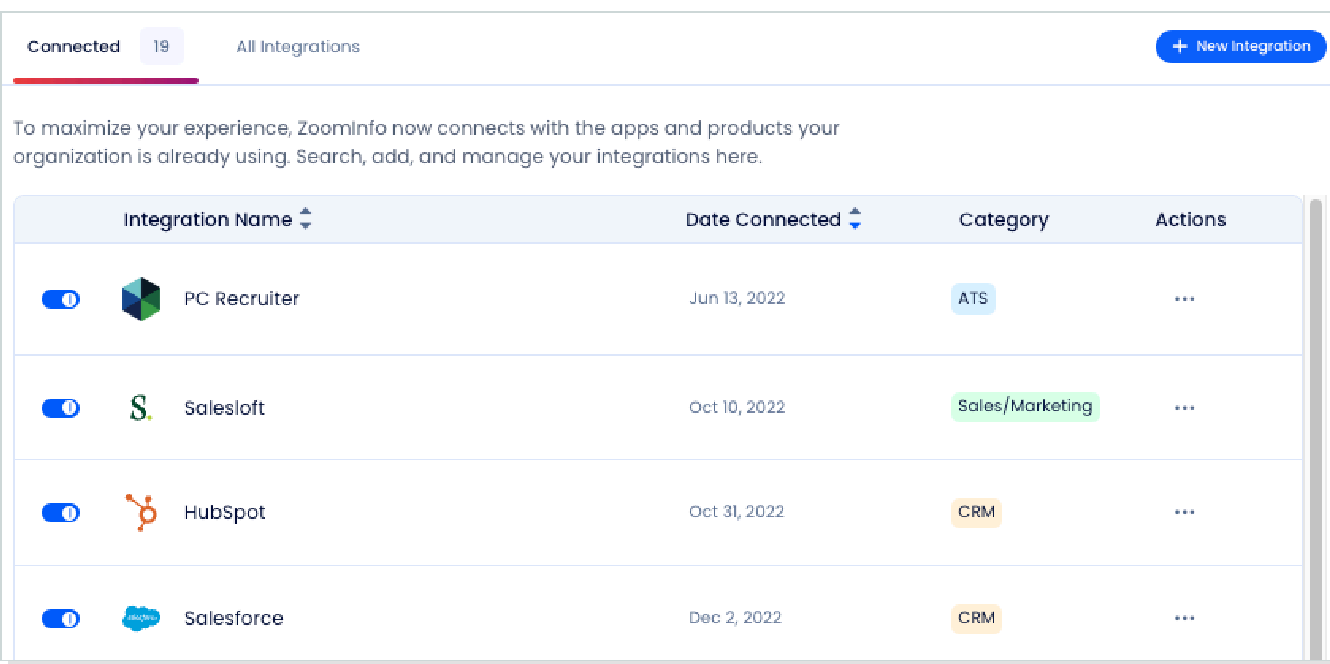
- If the mappings are not set correctly, an error notification displays indicating the adjustments needed.

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 > Connections** page.



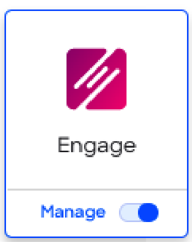
On this page, you can:

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.

Enable User Connections

Activate the toggle on the Engage integration tile.

Users can now connect to Engage and export candidates as Contacts or add them to a Talentflow.



Connect Users

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 Talent users can connect to Engage.

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