

Enrich for Eloqua Integration Guide

For administrators setting up ZoomInfo Enrich integration with Eloqua

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ZoomInfo Enrich is a feature available for ZoomInfo Sales. Enrich includes two applications for keeping your Eloqua database up to date with accurate B2B contact and company data.

- With **Instant Enrich**, your lead, contact and account records will be instantly appended with ZoomInfo data as they are created in your Eloqua environment.
- **Scheduled Enrich** provides scheduled jobs to keep your Eloqua records enriched on a regular cadence.

Create Custom Fields in Eloqua

Let's get started by creating a few key custom fields in Eloqua to capture ZoomInfo data. These custom fields will be used to track enrichment usage, reporting and help troubleshoot any errors.

1. Log into your Eloqua environment as an admin.
2. Follow the steps to create custom fields for contacts in the Eloqua documentation topic, [Creating contact fields](#).
3. Create the following Contact properties, making sure to enter the exact text for the Display Names:
 - **ZoomInfo Contact ID**
 - **ZoomInfo Company ID** (set the **Field Type** to **Text Box**)
1. Follow the steps to create custom fields for accounts in the Eloqua documentation topic, [Creating account fields](#).
2. Create the following Account properties, making sure to enter the exact text for the Display Name:
 - **ZoomInfo Company ID** (set the **Field Type** to **Text Box**)

Custom Field Recommendations

ZoomInfo strongly recommends creating custom fields for all ZoomInfo fields you want to capture. By creating and storing all ZoomInfo data in custom fields, you do not risk losing any existing data.

Additionally, tracking ZoomInfo data in separate custom properties allows you to understand exactly which properties were enriched by ZoomInfo.

Eloqua views provide a means to only view the data fields which matter to you. Create a custom view for viewing fields enriched by ZoomInfo. Follow these steps to create a view dedicated to ZoomInfo Enrich. Include the fields you would like ZoomInfo to append.

Fields You Can Enrich

Download this [Excel spreadsheet](#) that shows all potential fields ZoomInfo can enrich in Eloqua and recommendations for creating these fields in Eloqua.

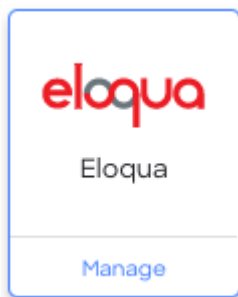
Scheduled Enrich

Keep your Eloqua database up to date with routine data enrichments. Data enrichment jobs allow you to select an update frequency and custom mapping configuration to determine exactly how you want to capture and write ZoomInfo data.

Connect ZoomInfo to Eloqua

The user making the connection must be a global admin in Eloqua and an admin in the ZoomInfo platform.

1. Log in to ZoomInfo and navigate to **Admin Portal > Enrich > Connections**.
2. In the **Scheduled Enrich** section, click **Connect** under the Eloqua tile.
A popup window displays.
3. Authenticate using the Eloqua user dedicated to running Enrich.
4. After successfully connecting, the Eloqua tile will display a **Manage** option. Click **Manage**.



Note: The top of the page displays the email account used to connect to Eloqua. If this email is different from the currently connected admin user, a link will be enabled to change to current admin.


Add Scheduled Jobs

Add recurring scheduled jobs to keep your Eloqua records enriched. Within each job, you'll specify the frequency of enrichment and configure the mapping of ZoomInfo data to Eloqua fields.

To add a scheduled job:

1. Click **Manage** under the Scheduled Enrich Eloqua tile.
2. Click **New Job**.

Back to job list



Eloqua
erica.fienman@zoominfo.com


Object Type

Select

Job Name

Description


Receive job email alerts



Select Object Type

Select object type to start creating Enrich Jobs

3. For **Object Type**, select either **Accounts** or **Contacts** in the drop-down.
4. Provide a **Job Name** and **Description** and choose whether you want job email alerts.



Eloqua
erica.fienman@zoominfo.com

Object Type

Contacts

Job Name

Description

Receive job email alerts

Job Settings

Configure the run frequency for your job.

▼ Job Settings

Select the schedule to run this job

Job Frequency Every

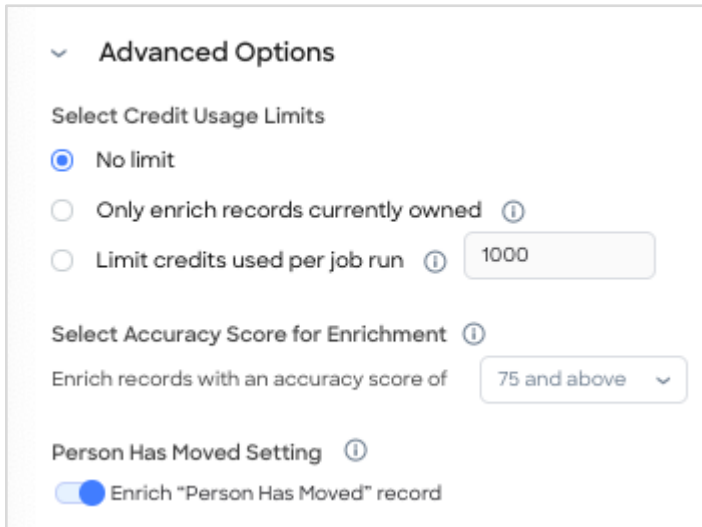
Weekly

Friday

Select the schedule to run this job: Configure the job frequency for recurring jobs. Jobs begin at 12:00 AM ET on the scheduled day.

Advanced Options

You can control credit usage when a job is run.



The screenshot shows a configuration panel titled "Advanced Options" with a dropdown arrow. It contains three sections:

- Select Credit Usage Limits:** Three radio button options: "No limit" (selected), "Only enrich records currently owned" (with an info icon), and "Limit credits used per job run" (with an info icon and a text input field containing "1000").
- Select Accuracy Score for Enrichment:** A label "Select Accuracy Score for Enrichment" (with an info icon) followed by the text "Enrich records with an accuracy score of" and a dropdown menu showing "75 and above".
- Person Has Moved Setting:** A label "Person Has Moved Setting" (with an info icon) followed by a toggle switch that is turned on, labeled "Enrich 'Person Has Moved' record".

Select Credit Usage Limits

Select one of the following options:

- **No limit:** Default option. All records in the job run will be enriched and applicable credits will be charged.
- **Only Enrich records currently owned:** Enrich only the records that are currently under management. This option does not incur any credit charges.
- **Limit credits used per job run:** Limits the number of credits spent for each job run to the number specified. Once the specified number of credits is reached, processing is stopped. Remaining records will be enriched in the next job run.

Select Accuracy Score for Enrichment

You can control contact enrichment by Accuracy Score, ensuring you are only enriching contacts that meet your minimum business requirements.

Note the following:

- Matched records that are not enriched because they do not meet your minimum Accuracy Score will be marked as **No Match** with a **No Match Reason** of "Below selected Accuracy Score".
- If you've enabled the **Enrich ZoomInfo Custom Object** toggle (under **Mapping**), contacts that do not meet the minimum Accuracy Score are not exported to the custom object.

Person Has Moved Setting

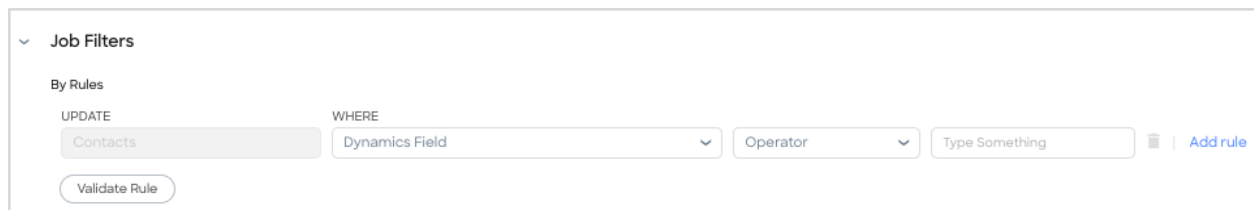
When ZoomInfo data indicates that a person has moved organizations, Scheduled Enrich jobs will do one of the following, depending on this setting:

- If **enabled** (default), the Person Has Moved record will be enriched to reflect the new organization. This is the existing default behavior that is automatically enabled in your Scheduled Enrich jobs unless you disable it.
- If **disabled**, the Person Has Moved record for Contacts and Leads will not be enriched.
 - ZoomInfo will continue to enrich the company fields as if the person has not moved
 - NeverBounce person details are enriched
 - The **Enrich Status** will change to **Company Match Only**

For details on mapping and other considerations for this setting, see [Person Has Moved Field Mapping](#).

Job Filters

Choose the method to define the data set to enrich.



The screenshot shows a configuration interface for 'Job Filters'. It is divided into sections: 'Job Filters' (with a dropdown arrow), 'By Rules', and 'WHERE'. Under 'By Rules', there is an 'UPDATE' dropdown menu currently showing 'Contacts'. To the right of this is a 'WHERE' dropdown menu showing 'Dynamics Field'. Further right is an 'Operator' dropdown menu. To the right of the 'Operator' dropdown is a text input field containing 'Type Something'. To the right of the text input field is a trash icon and a blue link labeled 'Add rule'. Below the 'UPDATE' dropdown is a button labeled 'Validate Rule'.

By Rules: Add field filter criteria to specify which objects you want to enrich. Each criteria row is joined with an **AND** operator.

- When using specific criteria, add one or more rules using the dropdown menus provided.
- As you create each rule, click **Validate Rule** to ensure the rule is valid and see how many companies in Eloqua are impacted by the rule.

Mapping

Configure the field mapping of ZoomInfo to your integration and the update logic for each field.

Mapping [Back to default preferences](#)

| ZoomInfo Field | Eloqua Field | Example | Update Option |
|----------------|------------------|-----------------------------|---------------------|
| Email Address | Email Address | e.g. hila.nir@zoominfo.com | Complete if miss... |
| First Name | First Name | e.g. Hila | Complete if miss... |
| Last Name | Last Name | e.g. Nir | Complete if miss... |
| Direct Phone | 1 Business Phone | e.g. (617) 500-4900 | Complete if miss... |
| Company Name | Company | e.g. Zoom Information, Inc. | Complete if miss... |
| Company Phone | 2 Business Phone | e.g. (781) 693-7500 | Complete if miss... |

ZoomInfo Field: Select the ZoomInfo data point you would like to return

Eloqua Field: Select the Eloqua field you would like to capture the specified data (supports custom fields, as well)

Update Option: Select whether you would like to overwrite existing data for complete if missing.

Important: ZoomInfo recommends the following:

- Work with your Eloqua administrator to understand field mapping and update options to ensure records are enriched as expected.
- Set all standard Eloqua fields to **Complete if missing** (this is the default state). Only select **Overwrite** for custom fields created specifically for ZoomInfo.
- **ZoomInfo Contact ID** and **ZoomInfo Company ID** are unique identifiers for ZoomInfo contact and company records. You should create and map custom fields to these fields.

Person Has Moved Field Mapping: If you've [enabled the Person Has Moved setting](#), map the ZoomInfo **Person Has Moved** field to an existing or custom field in your CRM.

- Use a text field type to avoid any formatting issues. Field values displayed are:
 - **Yes:** This person has left the company you had them profiled in
 - **No:** This person is still with their current company
 - **Uncertain:** ZoomInfo cannot verify if this person has left or not
- Set the **Update Option** field to **Overwrite** to be able to identify when a record changes after a job is run.
 - You can view the **Person Has Moved** column on the Enrich dashboard to see contacts where the **Person Has Moved** value is **Yes**.

- You can run a report in your CRM that keys on the field to which you mapped the ZoomInfo **Person Has Moved** field, and where the field value is **Yes**.
- Enrich does not associate contacts with their new companies. It is up to your organization to evaluate these records and adjust associations.
- The majority of the effort to resolve company associates for contacts occurs on the first run of a Scheduled Enrich job. Subsequent runs typically pick up a small number of deltas when people change companies.

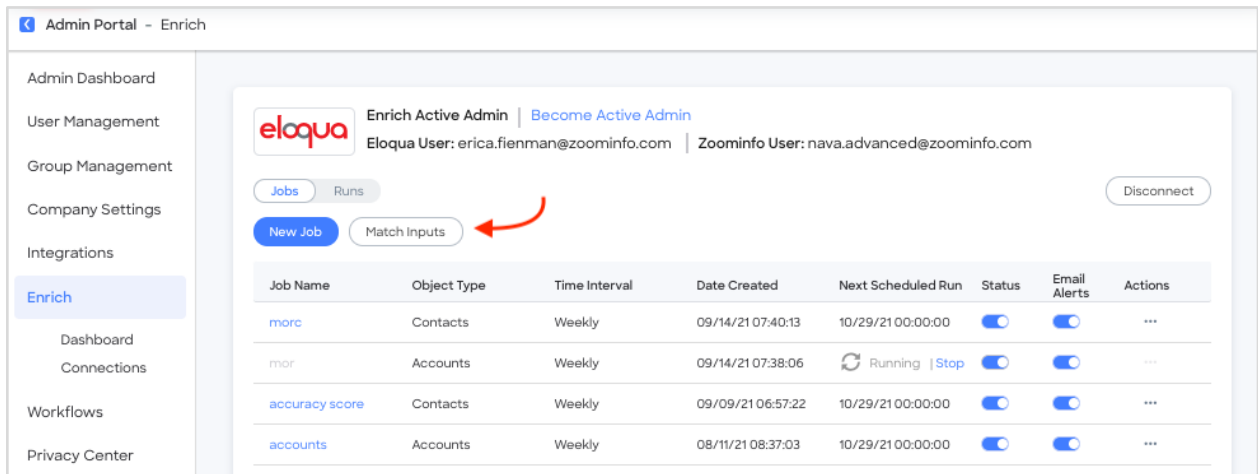
Customize Match Inputs

You can optionally include additional fields in your default match criteria using the **Customize Match Inputs** page.

Each object type (e.g., Accounts and Contacts) has a set of default fields that ZoomInfo uses to match in Eloqua. Although you cannot change the default ZoomInfo fields, you can include additional ZoomInfo fields on which to match - giving you more data accuracy control when enriching records in Eloqua.

To customize match inputs for your Enrich object types:

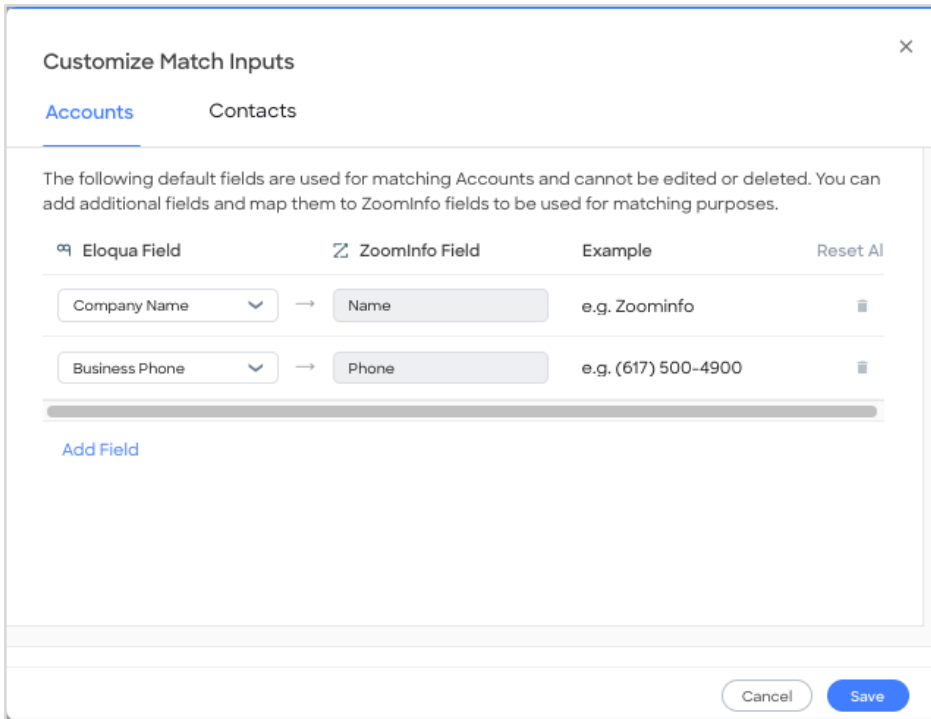
1. Click **Match Inputs** to view your current match inputs.



The screenshot shows the Admin Portal - Enrich interface. On the left is a navigation menu with options like Admin Dashboard, User Management, Group Management, Company Settings, Integrations, Enrich (selected), Dashboard, Connections, Workflows, and Privacy Center. The main content area shows the 'Enrich Active Admin' header with user information for Eloqua and ZoomInfo. Below this are 'Jobs' and 'Runs' tabs, and a 'Disconnect' button. A red arrow points to the 'Match Inputs' button. Below the tabs is a table listing Enrich jobs.

| Job Name | Object Type | Time Interval | Date Created | Next Scheduled Run | Status | Email Alerts | Actions |
|----------------|-------------|---------------|-------------------|--------------------|--------|--------------|---------|
| morc | Contacts | Weekly | 09/14/21 07:40:13 | 10/29/21 00:00:00 | On | On | ... |
| mor | Accounts | Weekly | 09/14/21 07:38:06 | Running Stop | On | On | ... |
| accuracy score | Contacts | Weekly | 09/09/21 06:57:22 | 10/29/21 00:00:00 | On | On | ... |
| accounts | Accounts | Weekly | 08/11/21 08:37:03 | 10/29/21 00:00:00 | On | On | ... |

The **Customize Match Inputs** page includes a tab for each object type (e.g., **Accounts** and **Contacts**).



2. Select the object type you want to customize. You cannot remove or edit the default match inputs, but you can include additional match inputs.
3. Click **Add Field** to select an additional field as a match input and map it to a corresponding field in Eloqua.
4. Click **Save**.

You can use the **Customize Match Inputs** page at any time to include additional match inputs or remove inputs that you've previously added. To return to the default match inputs, click **Reset All**.

Verify and Save

Click **Verify and Save** to finish creating the job. Any errors with job configuration will display.

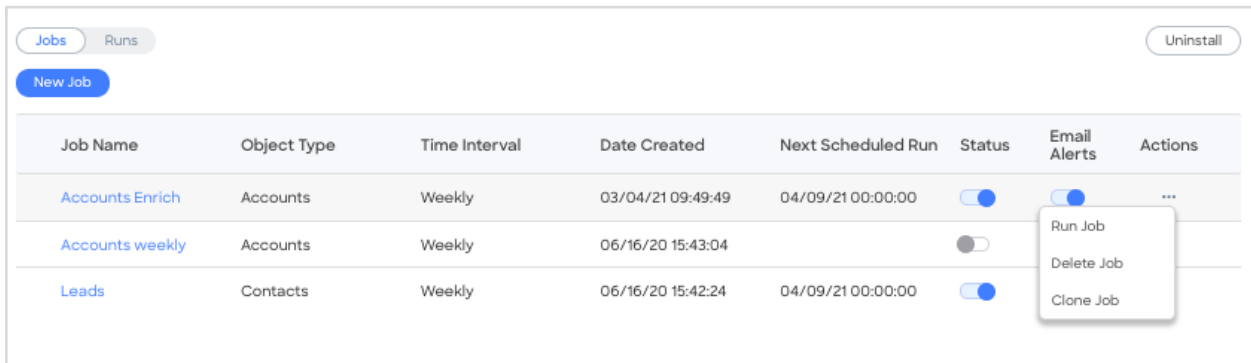


After your job is created successfully, you should see the new job listed in your Jobs table. You can enable or disable jobs by toggling the **Status** slider.

| Job Name | Object Type | Time Interval | Date Created | Next Scheduled Run | Status | Email Alerts | Actions |
|---------------------------------|-------------|---------------|-------------------|--------------------|-------------------------------------|-------------------------------------|---------|
| My Accounts | Accounts | Weekly | 04/21/21 11:08:56 | 04/28/21 00:00:00 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | ... |
| Accounts Enrich | Accounts | Weekly | 03/04/21 09:49:49 | 04/23/21 00:00:00 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | ... |
| Accounts weekly | Accounts | Weekly | 06/16/20 15:43:04 | | <input type="checkbox"/> | <input type="checkbox"/> | ... |
| Leads | Contacts | Weekly | 06/16/20 15:42:24 | 04/23/21 00:00:00 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | ... |

Manage Jobs

To run, clone, or delete a job, click the **Actions (...)** menu and select the desired action.



| Job Name | Object Type | Time Interval | Date Created | Next Scheduled Run | Status | Email Alerts | Actions |
|-----------------|-------------|---------------|-------------------|--------------------|-------------------------------------|-------------------------------------|---------|
| Accounts Enrich | Accounts | Weekly | 03/04/21 09:49:49 | 04/09/21 00:00:00 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | ... |
| Accounts weekly | Accounts | Weekly | 06/16/20 15:43:04 | | <input type="checkbox"/> | | |
| Leads | Contacts | Weekly | 06/16/20 15:42:24 | 04/09/21 00:00:00 | <input checked="" type="checkbox"/> | | |

View Job Runs

Each run of your Enrich Jobs will appear in the **Runs** table. Runs are created as soon as a job is initiated. Check the **Runs** table to view the status of jobs currently in progress and a historical list of completed runs.

1. Click **Runs**.



| Job Name | Start Time | End Time | Total Records | Matched | No Match | Enriched | Errors | Credits Used | Status |
|-----------------|-------------------|-------------------|---------------|---------|----------|----------|--------|--------------|--------|
| Leads | 01/22/21 16:34:13 | 01/22/21 16:35:34 | 37 | 21 | 16 | 21 | 0 | 10 | ✓ |
| Accounts weekly | 06/16/20 15:45:28 | 06/16/20 15:46:21 | 17 | 10 | 7 | 0 | 0 | 0 | ✓ |

2. Review the run information.

Manage the Connection

This section describes how you can manage the connection over time, including changing the Enrich Active Admin (for example, due to a departure or re-org), or disconnecting the Enrich integration.

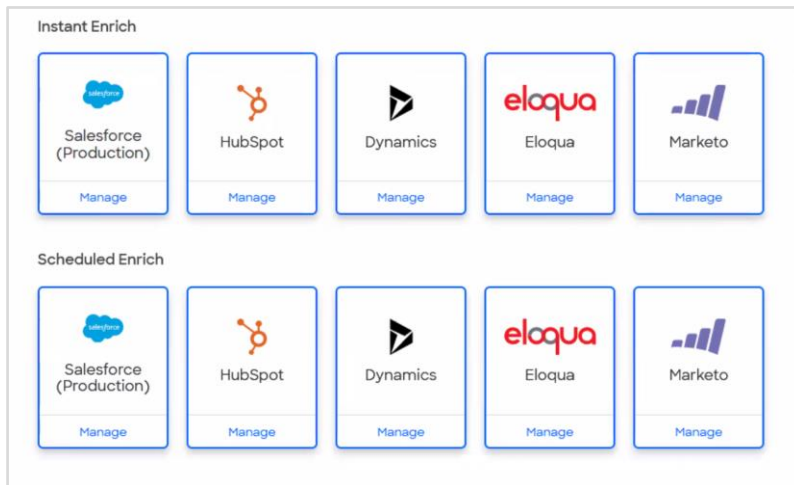
Change Enrich Active Admin

Enrich administrators must have full administrative privileges in Eloqua. The Enrich administrator must also have an Admin Portal seat on the ZoomInfo platform.

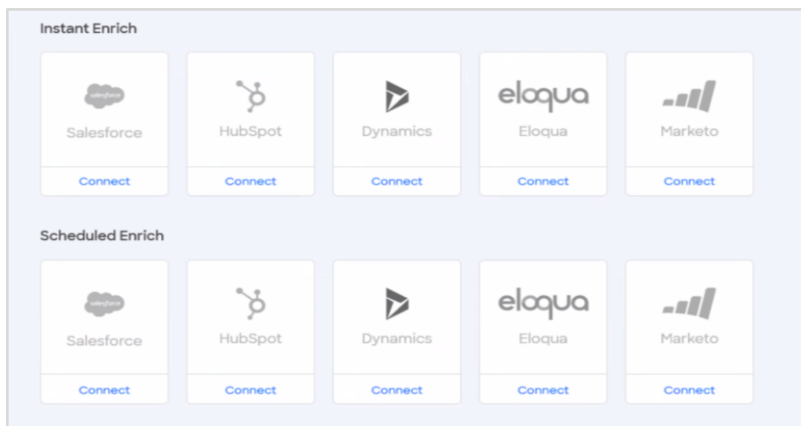
To change the Active Admin for Enrich:

1. Ensure you are logged in to Eloqua as an admin with full privileges.
2. Login to ZoomInfo and select **Admin Portal** from the waffle menu.
3. On the left menu click **Enrich**. The **Connections** page displays.

- Under **Scheduled Enrich**, find the tile for Eloqua and click **Manage**.

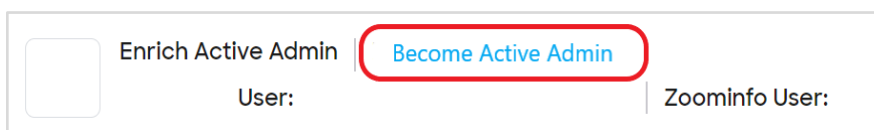


Note: If the tile is not in color and says **Connect** you will need to follow the prompts for connecting your ZoomInfo Admin seat to your Eloqua instance.

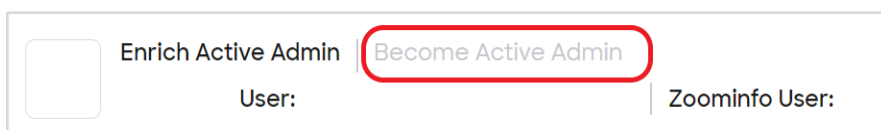


For additional information on how to connect Enrich for Eloqua see the [ZoomInfo Integrations Resource Matrix](#).

- After clicking **Manage** you are taken to the **Jobs** page in Scheduled Enrich. At the top of the page you will see **Enrich Active Admin**.
- If you are not the current Active Admin for Enrich the link will be blue. Click **Become Active Admin** and follow the prompts to become the Active Admin.



If **Become Active Admin** is gray it indicates that you are the current Enrich admin. Hover your mouse over **Become Active Admin** to confirm.



7. The Eloqua User shows the email address of the current Eloqua administrator connected to Enrich.
8. ZoomInfo User shows the ZoomInfo administrator logged into the ZoomInfo platform through the Admin Portal.

Disconnect ZoomInfo From Eloqua

If you want to disconnect ZoomInfo Enrich from Eloqua, disable any Enrich jobs using the **Status** toggle and then click **Disconnect** in the top right of the page.

Instant Enrich

Receive immediate insights into contacts and companies as they are created in your Eloqua environment by enabling Instant Enrich.

Install Instant Enrich

Download and install ZoomInfo Enrich action service application:

1. Navigate to the [installation link](#).
2. Log in to your Eloqua environment and click **Accept and Install**.
3. After successful installation, you are now ready to start enriching contacts in real-time.

Create a Program in Eloqua

ZoomInfo Enrich instantly appends contacts through an action service application which can be added to program canvases.

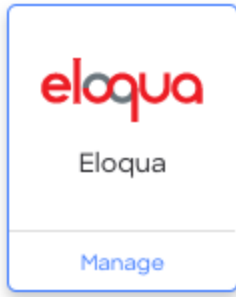
1. Learn more about [Eloqua Programs and how to create programs](#). You can also add ZoomInfo Enrich action service to existing programs.
2. After successful installation of the application above, the ZoomInfo application (ZoomInfo Enrich Service) is listed under the **Actions** section of the **Program Steps** sidebar.
3. Click and drag the action service application anywhere on your canvas, and connect to a workflow of your choice.
4. After you have created your canvas, click **Save** and then **Activate** to activate your canvas.

Connect ZoomInfo to Eloqua

1. Log in to ZoomInfo and navigate to **Admin Portal > Enrich > Connections**.
2. In the **Instant Enrich** section, click **Connect** under the Eloqua tile.

A popup window displays.

3. Authenticate using the Eloqua user dedicated to running Enrich.
4. After successfully connecting, the Eloqua tile will display a **Manage** option. Click **Manage**.



Note: The top of the page displays the email account used to connect to Eloqua. If this email is different from the currently connected admin user, a link will be enabled to change to current admin.

Enable Instant Enrich

1. Select the object type you want to enrich (**Accounts** or **Contact**).
2. Enable or disable enrichment by clicking the **Instant Enrich <object_type>** toggle.

You can also control contact enrichment by Accuracy Score, ensuring you are only enriching contacts that meet your minimum business requirements. Matched records that are not enriched because they do not meet your minimum Accuracy Score will be marked as **No Match** with a **No Match Reason** of "Below selected Accuracy Score".

Configure Mapping

1. Configure mapping to determine how ZoomInfo data will be captured.

The screenshot shows the 'Contacts' configuration page. At the top right is a 'Disconnect' button. Below it, 'Instant Enrich Contacts' is toggled on. There is a section for 'Select Accuracy Score for Enrichment' with a dropdown set to '75 and above'. A 'Back to default preferences' link is visible. The main area is a table for field mapping:

| ZoomInfo Field | Eloqua Field | Example | Update Option |
|----------------|------------------|-----------------------------|----------------|
| Email Address | Email Address | e.g. hila.nir@zoominfo.com | Compl. [trash] |
| First Name | First Name | e.g. Hila | Compl. [trash] |
| Last Name | Last Name | e.g. Nir | Compl. [trash] |
| Direct Phone | 1 Business Phone | e.g. (617) 500-4900 | Compl. [trash] |
| Company Name | Company | e.g. Zoom Information, Inc. | Compl. [trash] |
| Company Phone | 2 Business Phone | e.g. (781) 693-7500 | Compl. [trash] |

ZoomInfo Field: Select the ZoomInfo data point you would like to return

Eloqua Field: Select the Eloqua field you would like to capture the specified data (supports custom fields, as well)

Update Option: Select whether you would like to overwrite existing data for complete if missing.

Important: ZoomInfo recommends the following:

- Work with your Eloqua administrator to understand field mapping and update options to ensure records are enriched as expected.
- Set all standard Eloqua fields to **Complete if missing** (this is the default state). Only select **Overwrite** for custom fields created specifically for ZoomInfo.
- ZoomInfo **Contact ID** and **Company ID** are unique identifiers for ZoomInfo contact and company records. You should create and map custom fields to these fields.

2. Click **Verify and Save**.

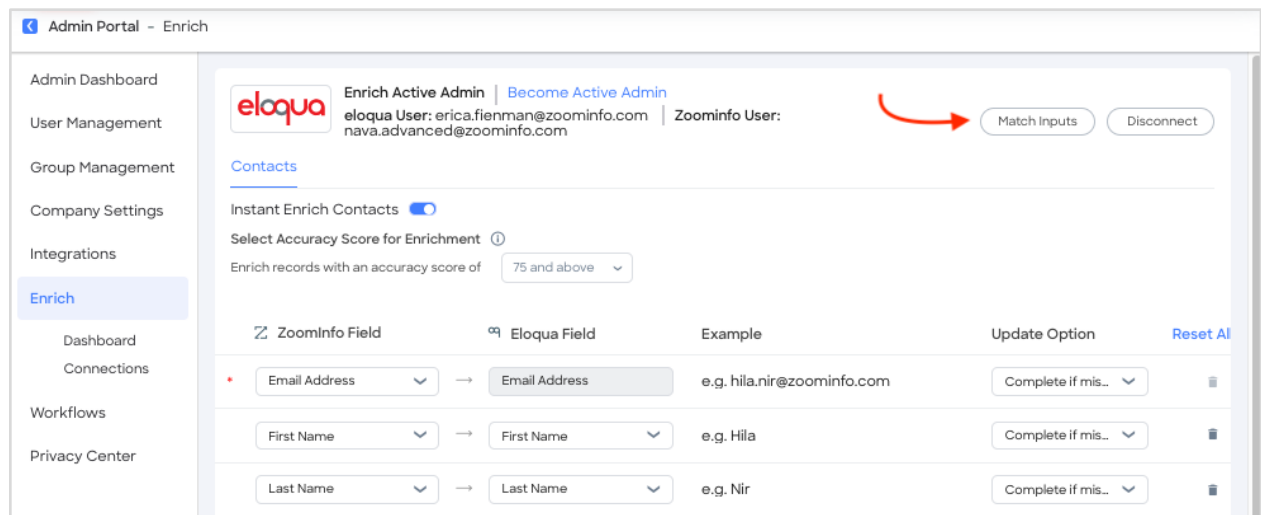
Customize Match Inputs

You can optionally include additional fields in your default match criteria using the **Customize Match Inputs** page.

Each object type (e.g., Accounts and Contacts) has a set of default fields that ZoomInfo uses to match in Eloqua. Although you cannot change the default ZoomInfo fields, you can include additional ZoomInfo fields on which to match - giving you more data accuracy control when enriching records in Eloqua.

To customize match inputs for your Enrich object types:

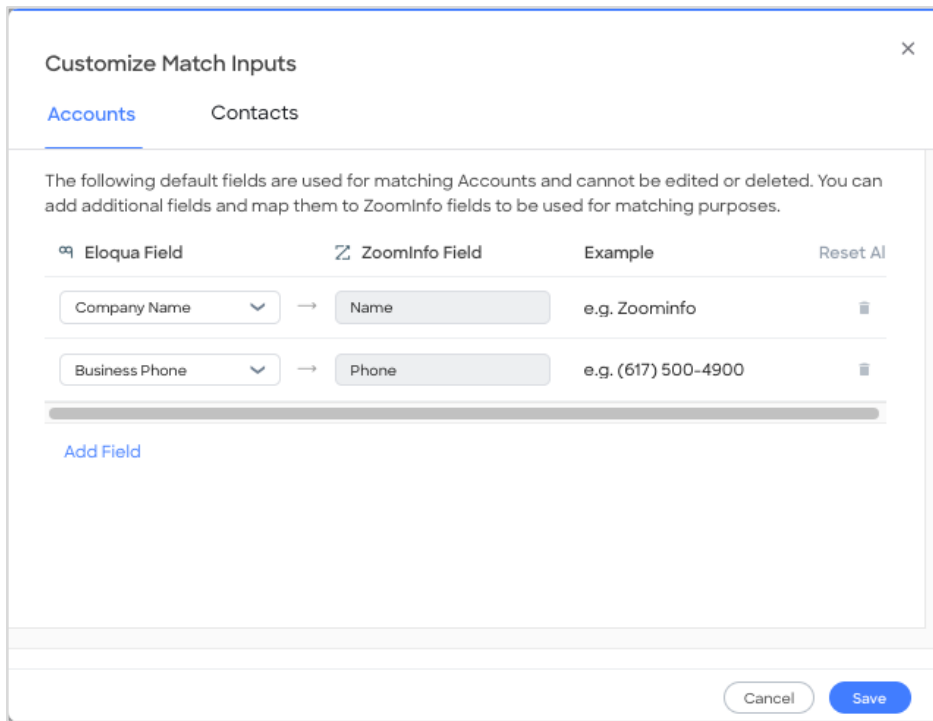
1. Click **Match Inputs** to view your current match inputs.



The screenshot shows the 'Admin Portal - Enrich' interface. On the left is a navigation menu with 'Enrich' selected. The main content area is for 'Contacts' and includes a 'Match Inputs' button highlighted with a red arrow. Below this, there are settings for 'Instant Enrich Contacts' (checked) and 'Select Accuracy Score for Enrichment' (set to '75 and above'). A table lists the match inputs:

| ZoomInfo Field | Eloqua Field | Example | Update Option | Reset All |
|----------------|---------------|----------------------------|--------------------|-----------|
| Email Address | Email Address | e.g. hila.nir@zoominfo.com | Complete if mis... | |
| First Name | First Name | e.g. Hila | Complete if mis... | |
| Last Name | Last Name | e.g. Nir | Complete if mis... | |

The **Customize Match Inputs** page includes a tab for each object type (e.g., **Accounts** and **Contacts**).



2. Select the object type you want to customize. You cannot remove or edit the default match inputs, but you can include additional match inputs.
3. Click **Add Field** to select an additional field as a match input and map it to a corresponding field in Eloqua.
4. Click **Save**.

You can use the **Customize Match Inputs** page at any time to include additional match inputs or remove inputs that you've previously added. To return to the default match inputs, click **Reset All**.

Manage the Connection

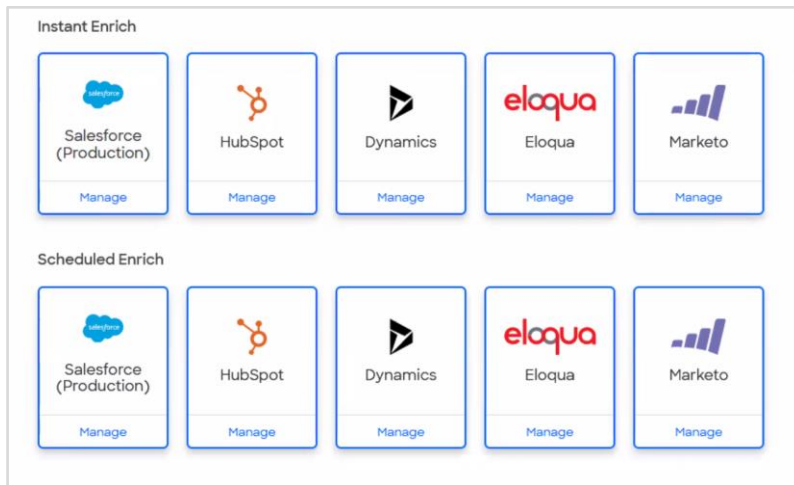
This section describes how you can manage the connection over time, including changing the Enrich Active Admin (for example, due to a departure or re-org), or disconnecting the Enrich integration.

Change Enrich Active Admin

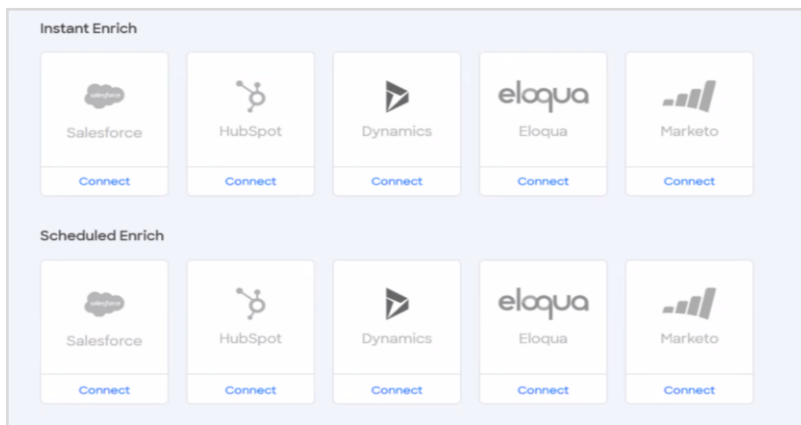
Enrich administrators must have full administrative privileges in Eloqua. The Enrich administrator must also have an Admin Portal seat on the ZoomInfo platform.

To change the Active Admin for Enrich:

1. Ensure you are logged in to Eloqua as an admin with full privileges.
2. Login to ZoomInfo and select **Admin Portal** from the waffle menu.
3. On the left menu click **Enrich**. The **Connections** page displays.
4. Under **Instant Enrich**, find the tile for Eloqua and click **Manage**.

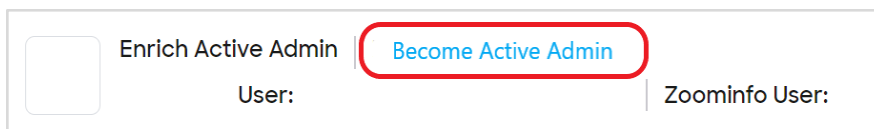


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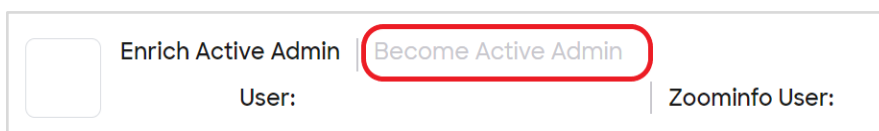


For additional information on how to connect Enrich for Eloqua see the [ZoomInfo Integrations Resource Matrix](#).

- At the top of the page you will see **Enrich Active Admin**. If you are not the current Active Admin for Enrich the link will be blue. Click **Become Active Admin** and follow the prompts to become the Active Admin.



If **Become Active Admin** is gray it indicates that you are the current Enrich admin. Hover your mouse over **Become Active Admin** to confirm.



- The Eloqua User shows the email address of the current Eloqua administrator connected to Enrich.

7. ZoomInfo User shows the ZoomInfo administrator logged into the ZoomInfo platform through the Admin Portal.

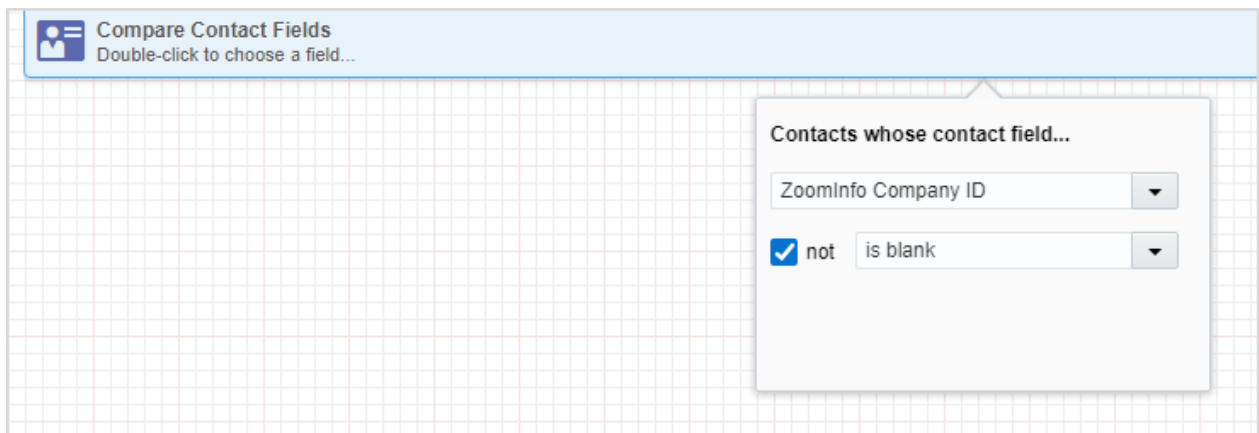
Disconnect ZoomInfo From Eloqua

If you want to disconnect ZoomInfo Enrich from Eloqua, disable any Enrich jobs using the **Status** toggle and then click **Disconnect** in the top right of the page.

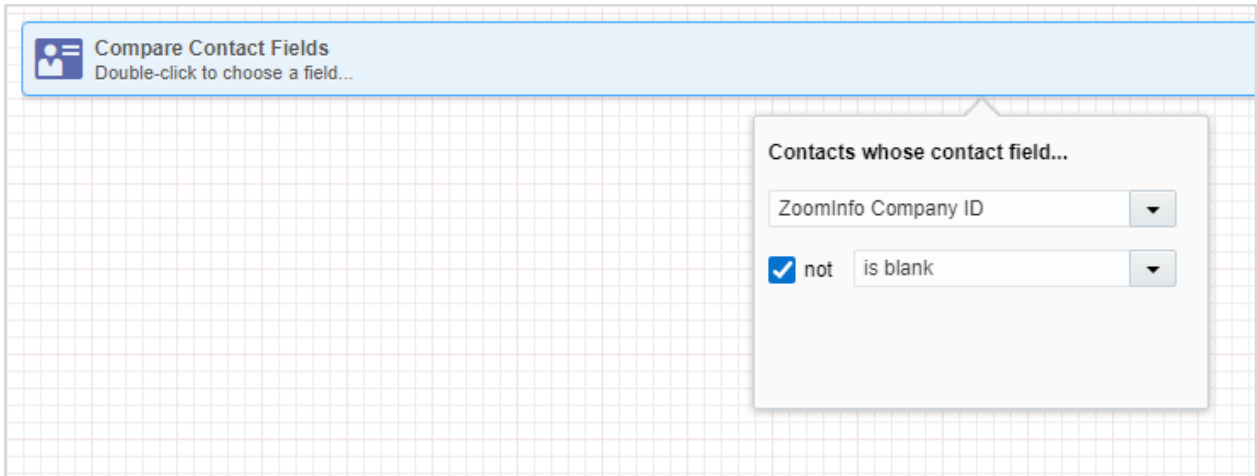
Create Eloqua Segment

Creating a segment based on the ZoomInfo ID custom fields provides a means to track contact records which have been enriched by ZoomInfo.

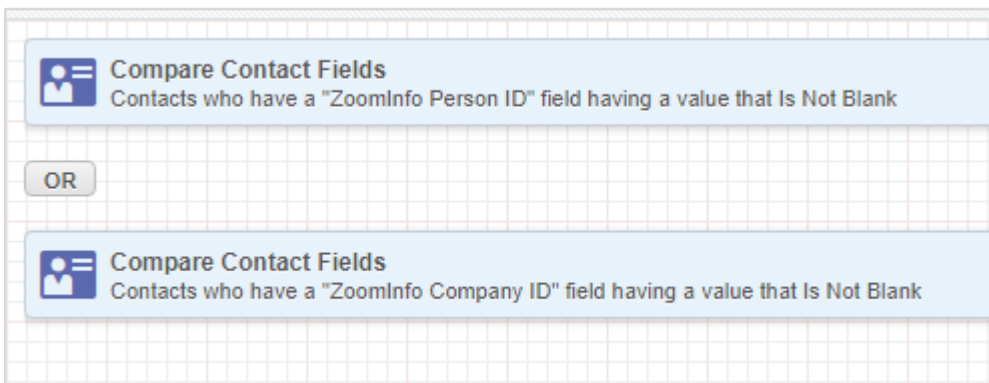
1. Create a new segment as described in the Eloqua documentation topic, [Creating segments](#).
2. Name your new segment *ZoomInfo Enriched Contacts*.
3. Double-click **Compare Contact Fields** from the right sidebar.
4. Double-click your filter to choose a field.
5. Select **ZoomInfo Contact ID** from the field list.
6. Check the **not** checkbox.
7. Select **is blank** from the dropdown list.



8. Double-click **Compare Contact Fields** from the right sidebar.
9. Double-click your second filter to choose a field.
10. Select **ZoomInfo Company ID** from the field list.
11. Check the **not** checkbox.
12. Select **is blank** from the dropdown list. Your second filter should look like this:



13. Change the operator to **OR**. After applying these two filters, your segment should look like this:



14. Click **Save** to save your segment.

You will be able to run this segment any time you want to view all the contact records that have been enriched by ZoomInfo.

Enrich Dashboard

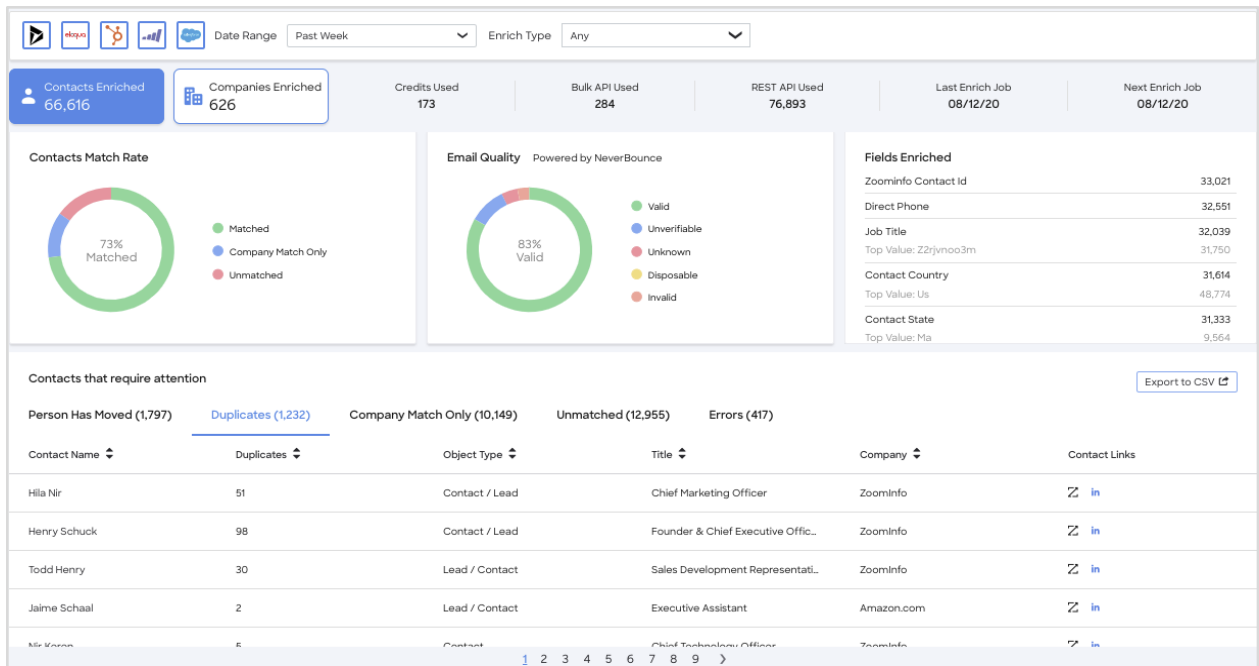
As a ZoomInfo admin, the Enrich dashboard gives you a detailed graphical view of how Scheduled Enrich has impacted the quality and depth of data for your connected CRM and marketing automation integrations.

Access the Enrich Dashboard

1. Go to **Admin Portal > Enrich > Dashboard**.

The default view for dashboard data is **Any**, which includes both Scheduled and Instant Enrich.

2. Use the **Enrich Type** dropdown to view Scheduled Enrich or Instant Enrich data.

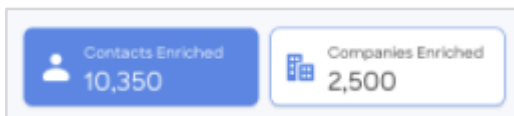


Using the Dashboard

This section describes the dashboard features and actions you can take.

View Contact and Company Enrich Statistics

Contacts Enriched and **Companies Enriched** provides the total number of contacts and companies enriched for the selected integrations.



View Credit and API Usage

The dashboard includes the number of **Credits Used**, **Bulk API Used**, and **REST API Used**. It also shows when the **Last Enrich Job** ran, and when the **Next Enrich Job** is scheduled.

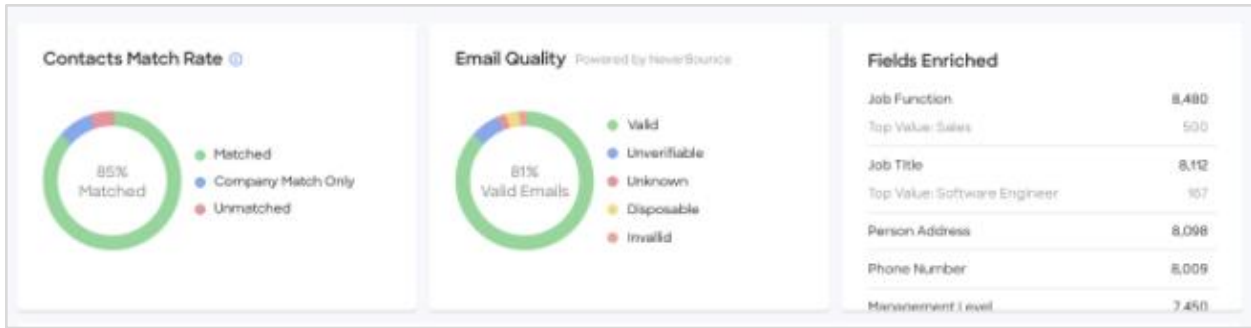


View Match Rate, Email Quality and Fields Enriched

You can view the overall **Contact Match Rate** (broken down by **Matched**, **Company Match Only**, or **Unmatched**).

If you are using NeverBounce, **Email Quality** shows you how NeverBounce has impacted your email delivery success and breaks the data down by NeverBounce status.

Finally, **Fields Enriched** provides a descending list of fields enriched, including the actual value that was most often enriched within some fields.



For **Email Quality**, the values are:

- **Valid:** Email exists and has been verified for safe sending.
- **Invalid:** Email does not exist and is not safe for sending.
- **Unverifiable:** No definitive way to determine whether an email is valid or invalid. If you have a third-party email provider that requires a low bounce rate, it is not safe to send.
- **Disposable:** Email is temporary or fake and is not safe for sending.
- **Unknown:** Unable to determine an email's status. Domain and/or server is not responding to our request. If you have a dedicated email server with your own IPs, it usually is safe for sending. If you use a third-party email provider, it is not safe for sending.

For **Fields Enriched**, the top value indicates the most enriched data point within each field. In the example above, the top value for Job Title is Software Engineer.

Work with Contacts or Companies Requiring Attention

Click **Contacts Enriched** or **Companies Enriched** to toggle information about contacts or companies that can help you rectify discrepancies.

Contacts that Require Attention

| Contacts that require attention | | | | | | Export to CSV |
|---------------------------------|--------------------|-----------------------------|------------------------------------|--------------|--------------------------------------|---------------|
| Person Has Moved (1,797) | Duplicates (1,232) | Company Match Only (10,149) | Unmatched (12,955) | Errors (417) | | |
| Contact Name | Duplicates | Object Type | Title | Company | Contact Links | |
| Hila Nir | 51 | Contact / Lead | Chief Marketing Officer | Zoominfo | Z in | |
| Henry Schuck | 98 | Contact / Lead | Founder & Chief Executive Offic... | Zoominfo | Z in | |
| Todd Henry | 30 | Lead / Contact | Sales Development Representati... | Zoominfo | Z in | |
| Jaime Schaal | 2 | Lead / Contact | Executive Assistant | Amazon.com | Z in | |
| Nik K... | 5 | Contact | Chief Technology Officer | Zoominfo | Z in | |

1 2 3 4 5 6 7 8 9 >

Companies that Require Attention

| Companies that require attention | | | | |
|--|-------------|---------------------------------|--|--------------------|
| Export to CSV | | | | |
| Defunct Companies (22) Duplicates (4) Unmatched (5) Errors (1,160) | | | | |
| Company Name | Object Type | Parent Company | Ultimate Parent Company | Company Links |
| RainKing Software | Account | DiscoverOrg LLC | Zoom Information, Inc. | in |
| RainKing Software | Account | DiscoverOrg LLC | Zoom Information, Inc. | in |
| RainKing Software | Account | DiscoverOrg LLC | Zoom Information, Inc. | in |
| RainKing Software | Account | DiscoverOrg LLC | Zoom Information, Inc. | in |
| RainKing Software | Account | DiscoverOrg LLC | Zoom Information, Inc. | in |

Discrepancies are categorized to help you manually investigate and resolve issues and export lists.

| Contact-related Tabs | Company-related Tabs |
|----------------------|----------------------|
| Person Has Moved | Defunct Companies |
| Duplicates | Duplicates |
| Company Match Only | Unmatched |
| Unmatched | Errors |
| Errors | |

Click **Export to CSV** to export up to 1,000 records for the current tab.