

Enrich for Salesforce Integration Guide

For administrators setting up ZoomInfo Enrich integration with Salesforce

Install the ZoomInfo for Salesforce Native Application	2
Required Salesforce Permissions	2
Custom Field Recommendations	3
Scheduled Enrich	3
Before You Begin	3
Connect ZoomInfo to Salesforce	3
Add Scheduled Jobs	4
ZoomInfo Custom Object	13
Enrich Intent and Scoops	14
Manage Jobs	18
View Job Runs	18
Manage the Connection	19
Instant Enrich	20
Before You Begin	21
Connect ZoomInfo to Salesforce	21
Configure Instant Enrich	24
Customize Match Inputs	26
Manage the Connection	27
Enrich Dashboard	28
Access the Enrich Dashboard	29
Using the Dashboard	29
API Considerations	32

ZoomInfo Enrich is a feature available for ZoomInfo Sales. Enrich includes two applications for keeping your Salesforce 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 Salesforce environment.
- **Scheduled Enrich** provides scheduled jobs to keep your Salesforce records enriched on a regular cadence.

Install the ZoomInfo for Salesforce Native Application

Before configuring Scheduled or Instant Enrich, install the ZoomInfo for Salesforce Native Application in your Salesforce instance.

The app package includes the **ZoomInfo Contact ID** and **ZoomInfo Company ID** fields. These managed fields are unique identifiers for ZoomInfo contact and company records and are required to be present before you can map your ZoomInfo to Salesforce fields when configuring Scheduled or Instant Enrich.

1. Go to the [Salesforce AppExchange](#) and search for *ZoomInfo Sales*
2. Click **Get It Now** to install the package.
3. Select the desired Salesforce environment (**Production** or **Sandbox**).

Important: When selecting an environment, you may elect to install the package in your Sandbox environment in order to test the functionality. Please note that using Enrich in a Sandbox environment will still incur bulk credit charges (as it does in a Production environment). As a result, we recommend that you perform your testing in small batches and, if necessary, work with your ZoomInfo Enrich Implementation Specialist to help meet your testing goals before implementing in Production.

4. Install the package for all users.

Required Salesforce Permissions

ZoomInfo Enrich requires the following permissions in Salesforce.

- View Setup and Configuration
- Customize Application
- Custom Metadata Type access to "ZoomInfo.DOZISF.JWT Setting"
- Enable Custom Setting Definitions Access to "ZoomInfo.DOZISF.Complete Setting"

Application Settings:

- API Enabled
- Apex REST Services
- Create and Customize List Views
- Read/write/edit access to Account, Contact, and Lead objects
- Field Level Security read/write access to Account Contact and Lead fields (standard and custom) mapped. This mapping is user defined within the configuration of Enrich.

Custom Field Recommendations

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

Scheduled Enrich

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

Before You Begin

Before configuring Scheduled or Instant Enrich, install the latest version of the ZoomInfo for Salesforce Native Application in your Salesforce instance.

Connect ZoomInfo to Salesforce

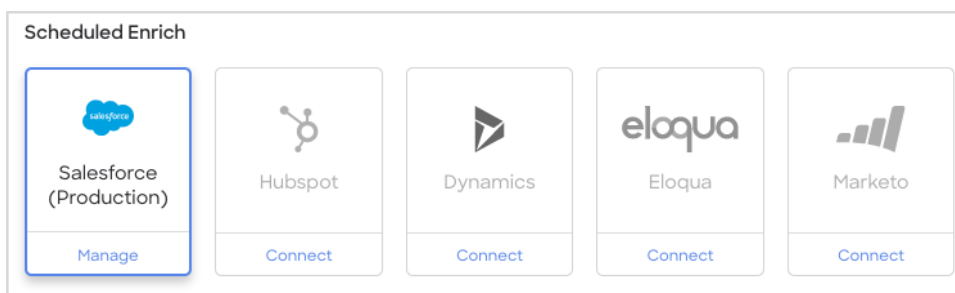
1. Go to **Admin Portal > Enrich > Connections**.
2. In the **Scheduled Enrich** section, click **Connect** under the Salesforce tile.
3. Select your environment and click **Connect**.

A pop-up displays to connect your Salesforce user dedicated to running Enrich.

4. After connecting, click **Grant Access**.

Note: Disable your browser's pop-up blocker if you did not see the Salesforce window display.

5. After successfully connecting, the Salesforce tile will display a **Manage** option. Click **Manage**.

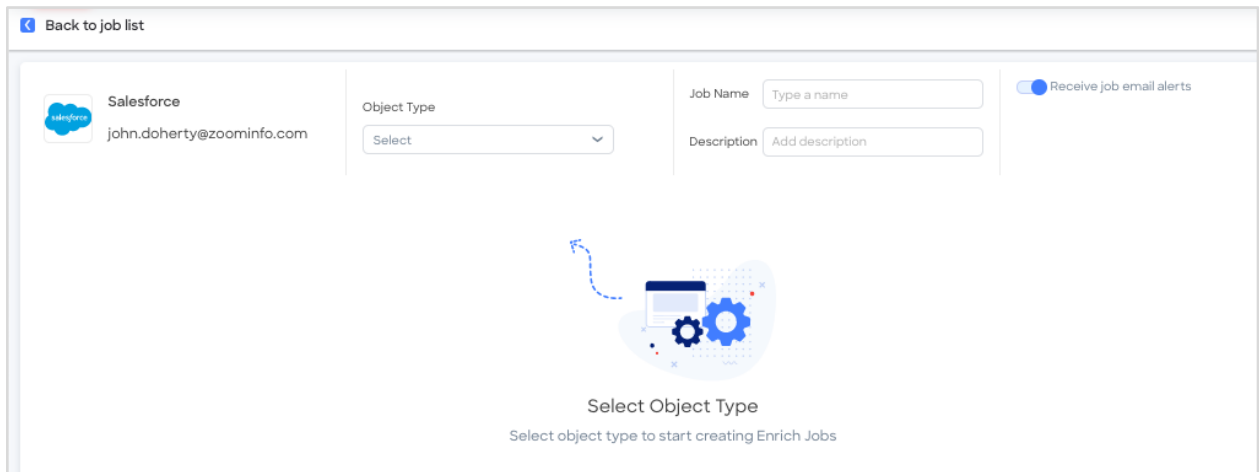


Add Scheduled Jobs

Add recurring scheduled jobs to keep your Salesforce records enriched. Within each job, you'll specify the frequency of enrichment, specify the static list to enrich, and configure the mapping of ZoomInfo data to Salesforce properties.

To add a scheduled job:

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



Back to job list

Salesforce
john.doherty@zoominfo.com

Object Type
Select

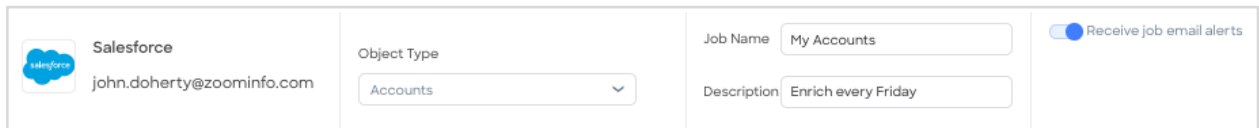
Job Name
Type a name

Description
Add description

Receive job email alerts

Select Object Type
Select object type to start creating Enrich Jobs

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



Salesforce
john.doherty@zoominfo.com

Object Type
Accounts

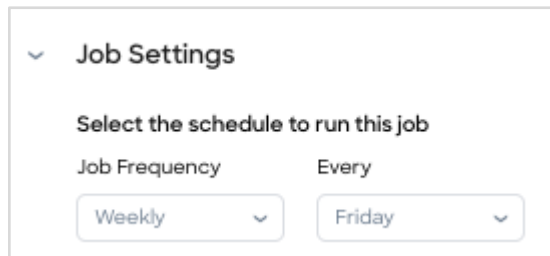
Job Name
My Accounts

Description
Enrich every Friday

Receive job email alerts

Job Settings

Configure the run frequency for your job.

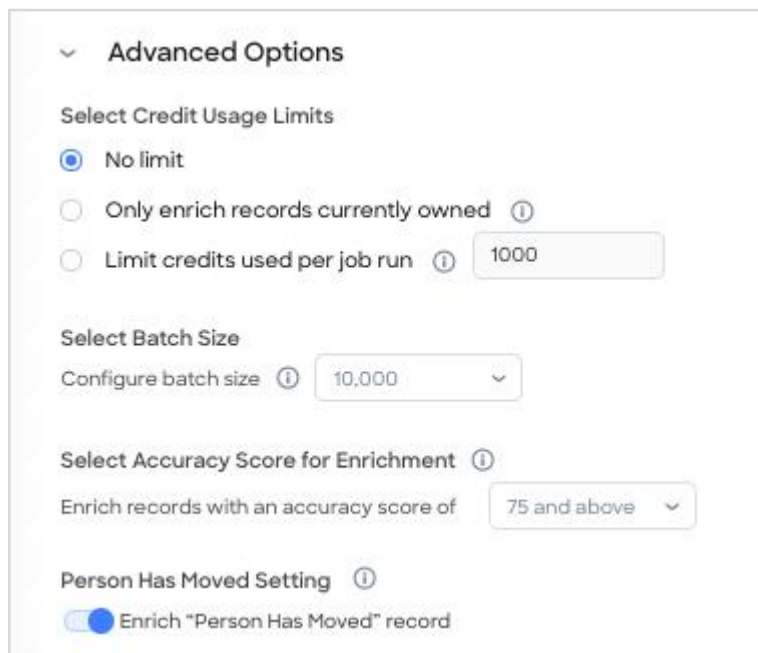


The screenshot shows a configuration panel titled "Job Settings" with a dropdown arrow. Below the title is the instruction "Select the schedule to run this job". Underneath, there are two labels: "Job Frequency" and "Every". Below "Job Frequency" is a dropdown menu with "Weekly" selected. Below "Every" is a dropdown menu with "Friday" selected.

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. Below the title is the instruction "Select Credit Usage Limits". There are 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"). Below this is the instruction "Select Batch Size" with a label "Configure batch size" (with an info icon) and a dropdown menu showing "10,000". Next is the instruction "Select Accuracy Score for Enrichment" (with an info icon) and a label "Enrich records with an accuracy score of" followed by a dropdown menu showing "75 and above". At the bottom is the instruction "Person Has Moved Setting" (with an info icon) and a toggle switch labeled "Enrich 'Person Has Moved' record" which is currently turned on.

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 Batch Size

Choose the batch size (10K, 1K, 500, or 200) for the number of records processed per API call. The default batch size is 10,000.

Note the following when configuring the batch size for your organization:

- A larger batch size results in less calls to the Salesforce Bulk API.
- Reducing the batch size will lead to increased Salesforce API call consumption.

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.

Job Filters

Specify which accounts you would like to enrich

Enrich all accounts

Enrich accounts within a List View

Enrich accounts with specific criteria

All Accounts

View number of records

Enrich all <objects>: Queries all the records within the Salesforce object

Enrich <objects> within a List View: Displays a dropdown menu of all available Salesforce lists that have enrichable records. Click View number of records to see the size of the selected list.

Enrich <objects> with specific criteria: Add field filter criteria to specify which objects you want to enrich. Each criteria row is joined with an AND operator.

Mapping

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

Mapping

[Back to default preferences](#)

ZoomInfo Field	Salesforce Field	Example	Update Option
Name	Account Name	e.g. Zoom Information, Inc.	Complete if mis...
ZoomInfo Company ID	ZoomInfo Company ID (D..	e.g. 344589814	Overwrite field
Current Date and Time	ZoomInfo First Updated (D..	e.g. 01/02/2020 12:00:00PM UTC	Complete if mis...
Current Date and Time	ZoomInfo Last Updated (D..	e.g. 01/02/2020 12:00:00PM UTC	Overwrite field
Description	Account Description	e.g. ZoomInfo is the most compre...	Complete if mis...
Street	Billing Street	e.g. 307 Waverley Oaks Road, Suit...	Complete if mis...
City	Billing City	e.g. Waltham	Complete if mis...
State	Billing State/Province	e.g. Massachusetts	Advanced Complete if mis...
Zip Code	Billing Zip/Postal Code	e.g. 02452	Complete if mis...
Country	Billing Country	e.g. United States	Advanced Complete if mis...

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

Salesforce Field: Select the Salesforce 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 Salesforce administrator to understand field mapping and update options to ensure records are enriched as expected.
- Set all standard Salesforce 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.

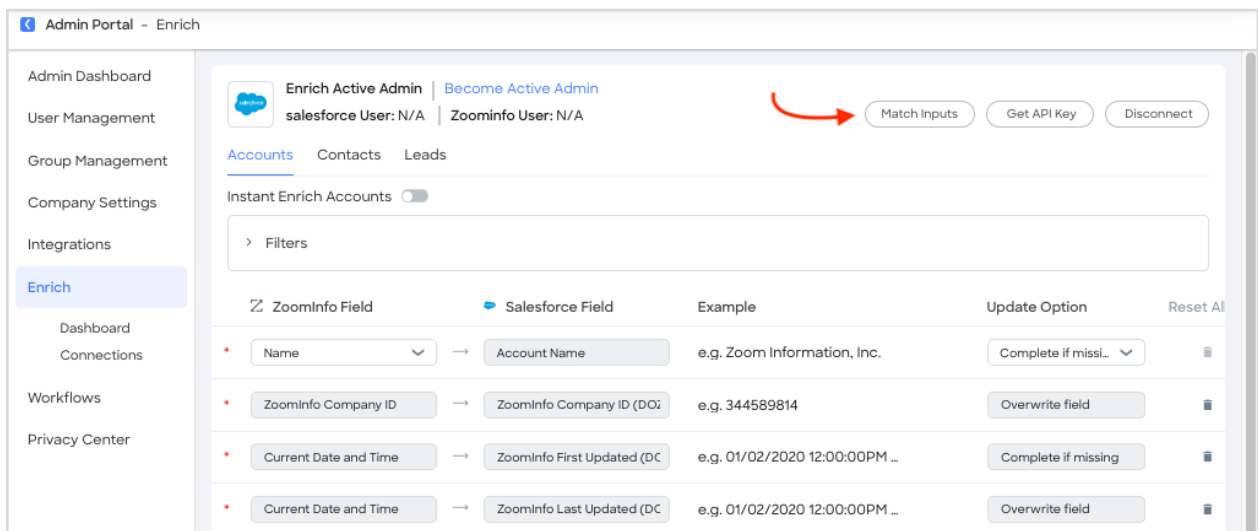
Customize Match Inputs

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

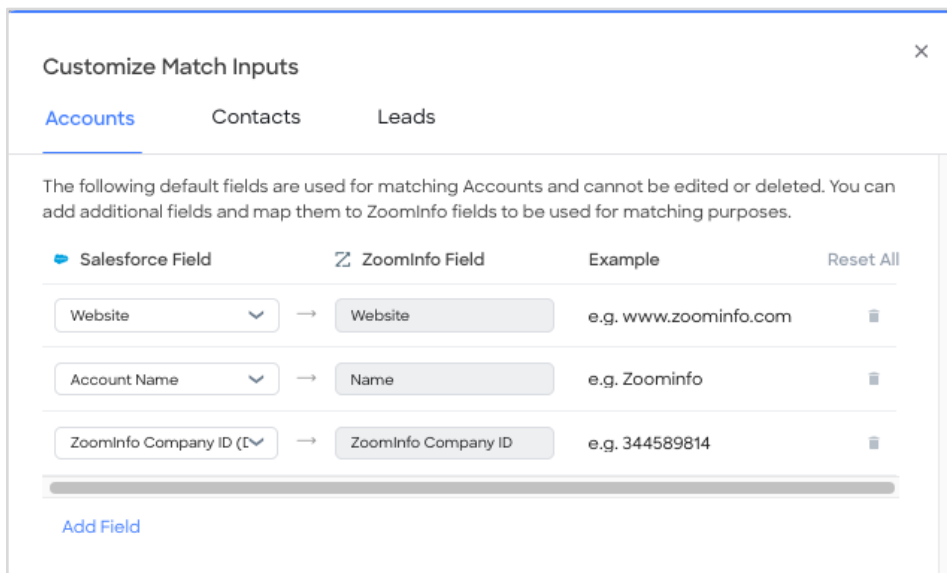
Each object type (e.g., Accounts, Contacts, and Leads) has a set of default fields that ZoomInfo uses to match in Salesforce. Although you cannot change the default ZoomInfo fields, you can include additional ZoomInfo fields on which to match - giving you more data accuracy control when enriching records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

To customize match inputs for your Enrich object types:

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



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



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 Salesforce.
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**.

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.

Export Buying Committee

When configuring a Scheduled Enrich job for the Accounts object type, use the Export Buying Committee section to define the **Job Title**, **Job Function** and **Management Level** for contacts that represent your desired buying committee. These contacts will be exported and enriched in Salesforce when you export an account.

- The **Job Title**, **Job Function** and **Management Level** criteria categories are joined using an AND operator, meaning that contacts must match all selected criteria categories.
- Choices within each of these criteria categories are joined with an OR operator. For example, if you select **VP** and **Director** within the **Management Level** category, you'll get both VP and Director contacts in your results.
- A credit is charged for each contact exported or enriched.
- Because this process is asynchronous, you should expect a short delay between job completion and when contacts are created in Salesforce.

You can configure your Export Buying Committee settings when configuring a Scheduled Enrich job for the **Accounts** object type.

The screenshot shows the Salesforce interface for configuring a job. At the top, the user is identified as John Doherty (john.doherty@zoominfo.com). The job is named 'Accounts Enrich' and is of type 'Accounts'. There are fields for 'Job Name' (Accounts Enrich), 'Description' (Add description), and a toggle for 'Receive job email alerts' (checked). Metadata shows it was created and last updated on 03/04/21 at 09:49:49.

The main configuration area includes several sections:

- Job Settings**: A collapsed section.
- Job Filters**: A collapsed section.
- Mapping**: A collapsed section.
- Intent Settings**: A section with a toggle switch that is turned on.
- Scoops Settings**: A section with a toggle switch that is turned on.
- Export Buying Committee**: A section with a toggle switch that is turned off. It includes:
 - Criteria selection: 'Job Title', 'Job Function', and 'Management Level' buttons.
 - Update Settings: Radio buttons for 'Enrich existing contacts' (selected) and 'Ignore existing contacts'.
 - A field to specify the number of contacts per job run, set to '5', with a note 'This is limited up to 10 contacts'.
- Contact Mapping**: A collapsed section.

For example, click **Job Function** to define one or more representative job functions. Each job function you select within Job Function (e.g., IT Operations, Technology Operations and Logistics) will be joined with an OR operator.

The 'Select Job Function' dialog box allows users to choose department and job functions for their contacts. It features a 'Clear All' link and a search bar containing 'IT Operations', 'Technology Operations', and 'Logistics', each with a close button. Below the search bar, an example text reads: 'Example: Marketing, Operations, Finance, Engineering & Technical, Information Technology'. At the bottom, there are 'Cancel' and 'Add' buttons.

Use the **Update Settings** section to fine tune your job.

Update Settings

Enrich existing contacts

Ignore existing contacts

Specify the number of contacts you want to create for each job run This is limited up to 10 contacts

- Choose to enrich or ignore existing contacts. As a best practice, choose **Ignore existing contacts** to prioritize net new contact creation.
- You can set a hard limit (up to 10 contacts) for the number of contacts created per account. Each contact exported or enriched will consume one credit.

Finally, the **Export Buying Committee** section includes its own **Contact Mapping** section, letting you specify how contact fields are mapped to corresponding Salesforce fields.

▼ Export Buying Committee ⓘ

Choose the criteria to create new contacts in your CRM

Update Settings

Enrich existing contacts

Ignore existing contacts

Specify the number of contacts you want to create for each job run This is limited up to 10 contacts

▼ **Contact Mapping** [Back to default preferences](#)

ZoomInfo Field	→	Salesforce Field	Example	Update Option
Last Name	→	Last Name	e.g. Nir	Complete i...
ZoomInfo Contact ID	→	ZoomInfo Contact ID (DO...	e.g. 1645938489	Overwrite ...
ZoomInfo Company ID	→	ZoomInfo Company ID (D...	e.g. 344589814	Overwrite ...
Current Date and Time	→	ZoomInfo First Updated (...)	e.g. 01/02/2020 12:00:00PM UTC	Complete i...
Current Date and Time	→	ZoomInfo Last Updated (...)	e.g. 01/02/2020 12:00:00PM UTC	Overwrite ...
First Name	→	First Name	e.g. Hila	Complete i...

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"/>	...

ZoomInfo Custom Object

You can utilize a custom object called "ZoomInfo" to capture all possible data fields available to you in default mapping without having to map every field in custom mapping settings.

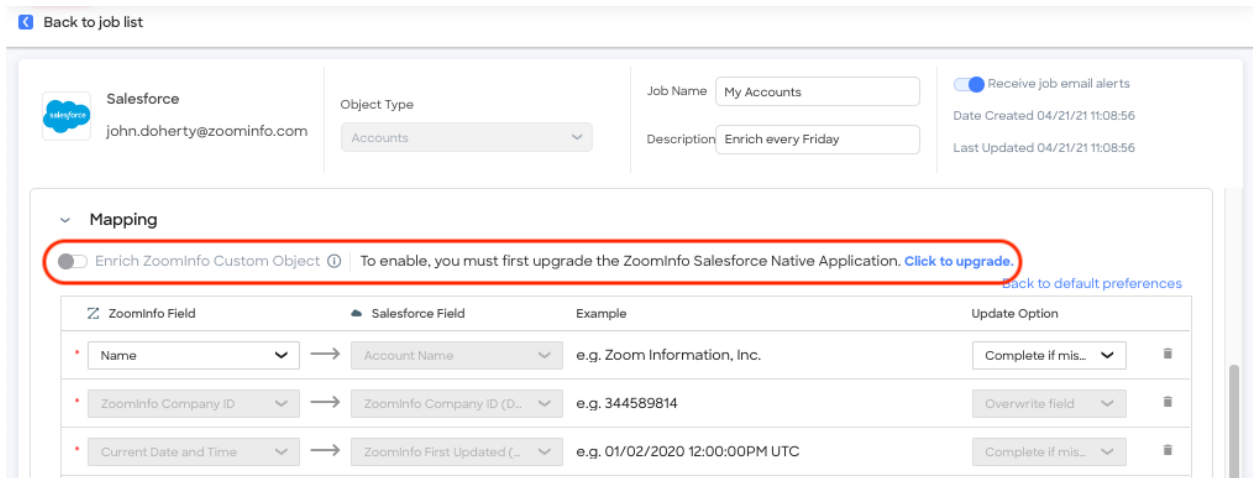
By using the custom object, you'll continue to get the ZoomInfo data you want in your Salesforce records custom mapping settings while also having access to the full data for Contact and Company records you've purchased - without expending any additional credits.

Once you enable the ZoomInfo custom object, a Salesforce admin can modify Account, Contact, and Lead pages to include a related list that houses the custom object, enabling users to easily explore the complete ZoomInfo data for that object.

Before configuring this feature, install or upgrade the ZoomInfo Sales Native Application to version 1.33 or higher from the [Salesforce Appexchange](#).

Once you've successfully installed or upgraded the app:

1. Go to **Admin Portal > Enrich**.
2. Click **Connections**.
3. Under **Scheduled Enrich**, click **Manage** on the Salesforce tile.
4. Click the **Mapping** tab.
5. Select an existing job or configure a **New Job**.
6. Expand the **Mapping** section.
7. Enable the **ZoomInfo Custom Object Export** toggle for the desired object types (Accounts, Contacts, Leads).



8. Ask your Salesforce admin to add the ZoomInfo custom object to a related list on corresponding Account, Contact, and Lead pages in Salesforce.

Enrich Intent and Scoops

If your organization has access to ZoomInfo Intent and Scoops data, you can choose to enrich your Salesforce accounts with this data.

Note the following considerations:

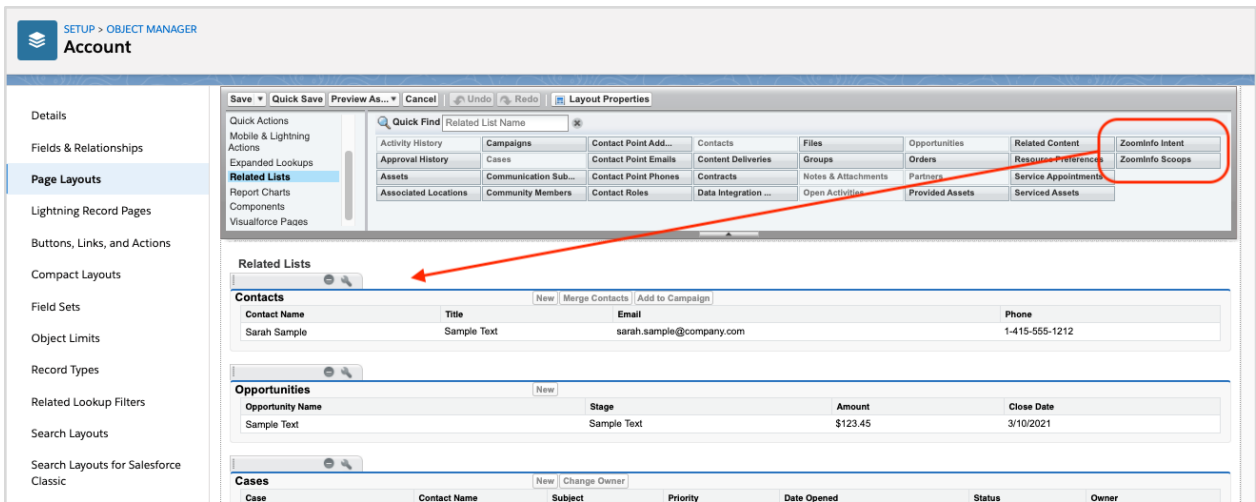
- Intent and Scoops from the past 30 days are enriched in Salesforce.
- For Account Enrich jobs that include Intent and Scoops, the process for enriching the Intent and Scoops data is separate from other Account data processed with the job. There may be a delay between when an Enrich job is completed, and when the Scoops and Intent data is enriched in Salesforce.
- Enriching Intent and Scoops will incur separate API calls.
- When viewing the Enrich dashboard, Scoops and Intent data statistics are currently not included.

Configure Custom Objects

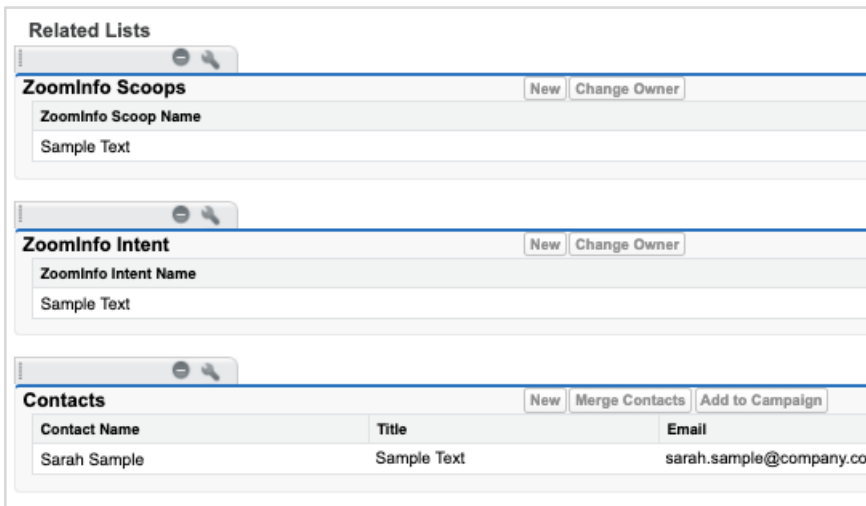
Intent and Scoops are exported to corresponding custom objects included with the ZoomInfo Sales Native Application package.

A Salesforce admin can embed these custom objects in the Account view to make the data visible to users by doing the following:

1. Edit the **Page Layout** for the **Account** view.



- From the **Related Lists** section, drag the **ZoomInfo Intent** and **ZoomInfo Scoops** objects into the **Related Lists** layout.



- To get detailed information on this record, click the wrench icon and add **Topics & Type** under the **ZoomInfo Scoops Related List** and **Topic & Category** under the **ZoomInfo Intent Related List**.

Related List Properties - ZoomInfo Scoops [x]

[Help](#) [?]

Columns [-]

Select fields to display on the related list. You can also re-order the selected fields.

Available Fields		Selected Fields	
Contact	Add <input type="button" value="▶"/> <input type="button" value="◀"/> Remove	Topics	Up <input type="button" value="▲"/> <input type="button" value="▼"/> Down
Created By		Type	
Created By Alias		ZoomInfo Scoop Name	
Created Date			
Date Published			
Description			
Last Modified By			
Last Modified By Alias			

Sort By: --Default-- [v]

Ascending
 Descending

Buttons [+]

OK Cancel Revert to Defaults

Related List Properties - ZoomInfo Intent [x]

[Help](#) [?]

Columns [-]

Select fields to display on the related list. You can also re-order the selected fields.

Available Fields		Selected Fields	
Change in Signal Score	Add <input type="button" value="▶"/> <input type="button" value="◀"/> Remove	Topic	Up <input type="button" value="▲"/> <input type="button" value="▼"/> Down
Created By		Category	
Created By Alias		ZoomInfo Intent Name	
Created Date			
Intent ID			
Last Modified By			
Last Modified By Alias			
Last Modified Date			

Sort By: --Default-- [v]

Ascending
 Descending

Buttons [+]

OK Cancel Revert to Defaults

- Click **Save**. Once Enrich jobs are processed, users viewing an Account will show Intent and Scoops information in these sections.

Enable Intent and Scoops Enrich

As an admin configuring a Scheduled Enrich job for Accounts in Salesforce:

1. Select the **Accounts** object type.

The screenshot shows two sections: 'Intent Settings' and 'Scoops Settings'. Both have a toggle switch turned on. Under 'Intent Settings', there is a text prompt 'Choose the specific Intent criteria you would like to export to Salesforce: ⓘ' and a button labeled 'Topics'. Under 'Scoops Settings', there is a similar text prompt 'Choose the specific Scoop criteria you would like to export to Salesforce: ⓘ' and three buttons labeled 'Types', 'Departments', and 'Topics'.


2. Enable the toggle for Intent and/or Scoops and select criteria for the topics you're interested in.

The 'Select Scoop Topics' dialog box shows a search bar and a list of categories on the left. Three topics are selected and listed in the right pane: 'Scoop Topic: Emerging Tech', 'Scoop Topic: Enterprise Technology', and 'Scoop Topic: Infrastructure'. The status bar indicates '3 Topics were selected | Clear'. 'Save' and 'Cancel' buttons are at the bottom.

The 'Select Intent Topics' dialog box shows a search bar and a list of categories on the left. Four topics are selected and listed in the right pane: 'Intent Topic: Analytics & Insights', 'Intent Topic: Big Data', 'Intent Topic: Data Science', and 'Intent Topic: Storage'. The status bar indicates '4 Topics were selected | Clear'. 'Save' and 'Cancel' buttons are at the bottom.

3. Click **Verify & Save**.

Back to job list

 Salesforce
 john.doherty@zoominfo.com

Object Type: Accounts
 Job Name: Accounts Enrich
 Description: Add description

Receive job email alerts

Job Filters
 Specify which accounts you would like to enrich
 Enrich all accounts
 Enrich accounts within a List View
 Enrich accounts with specific criteria

Mapping

Intent Settings
 Choose the specific intent criteria you would like to export to Salesforce: [Topics \(4\)](#)

Scoops Settings
 Choose the specific Scoop criteria you would like to export to Salesforce: [Types \(2\)](#) [Departments \(1\)](#) [Topics \(3\)](#)

Manage Jobs

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

Jobs Runs Uninstall

[New Job](#)

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"/>		Run Job Delete Job Clone Job
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**.

Jobs **Runs** Uninstall

[Refresh Table](#)

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	<input checked="" type="checkbox"/>
Accounts weekly	06/16/20 15:45:28	06/16/20 15:46:21	17	10	7	0	0	0	<input checked="" type="checkbox"/>

2. Review the run information.

Manage the Connection

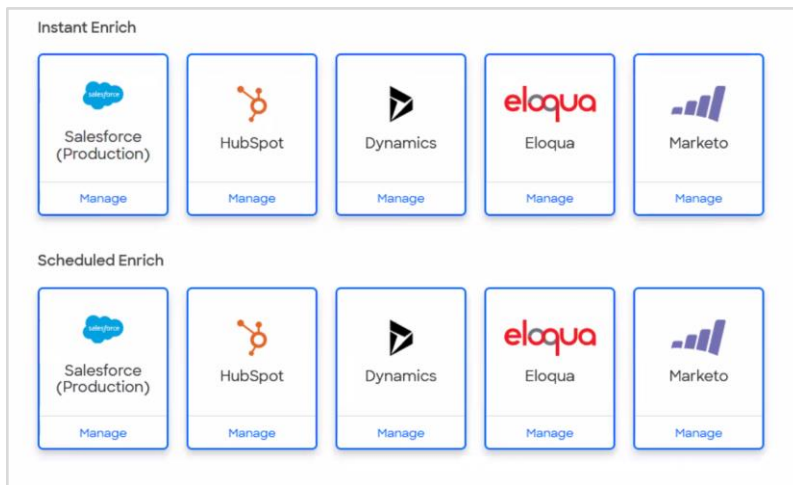
This section describes how you can manage the connection over time, including changing the Enrich Active Admin (for example, due to a departure or re-org), or disconnecting the Enrich integration.

Change Enrich Active Admin

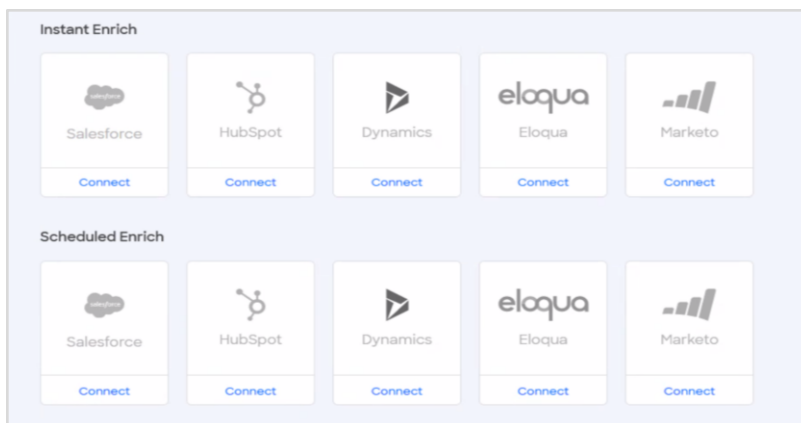
Enrich administrators must have full administrative privileges in Salesforce. The Enrich administrator must also have an Admin Portal seat on the ZoomInfo platform.

To change the Active Admin for Enrich:

1. Ensure you are logged in to Salesforce 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 **Scheduled Enrich**, find the tile for Salesforce and click **Manage**.

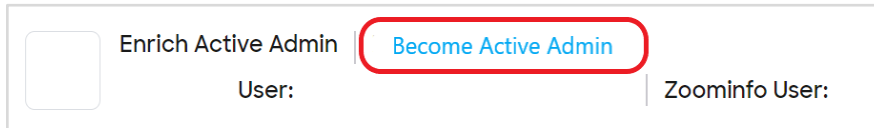


Note: If the tile is not in color and says **Connect** you will need to follow the prompts for connecting your ZoomInfo Admin seat to your Salesforce instance.

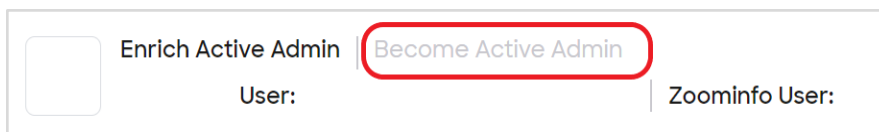


For additional information on how to connect Enrich for Salesforce see the [ZoomInfo Integrations Resource Matrix](#).

5. 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**.
6. 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 Salesforce User shows the email address of the current Salesforce administrator connected to Enrich.
8. ZoomInfo User shows the ZoomInfo administrator logged into the ZoomInfo platform through the Admin Portal.

Disconnect ZoomInfo From Salesforce

If you want to disconnect ZoomInfo Enrich from Salesforce, 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 Salesforce environment by enabling instant enrichment. You configure Instant Enrich for Leads, Contacts, and Accounts independently.

Before You Begin

Before configuring Scheduled or Instant Enrich, install the ZoomInfo for Salesforce Native Application in your Salesforce instance.

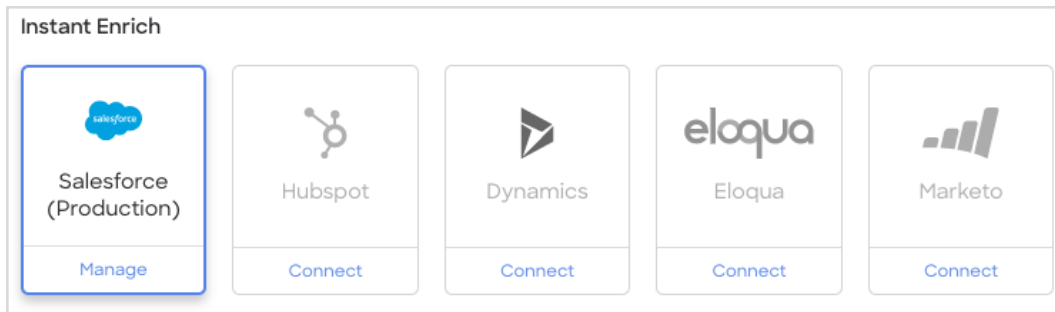
Connect ZoomInfo to Salesforce

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

- A pop-up displays to connect your Salesforce user dedicated to running Enrich. After connecting, click **Grant Access**.

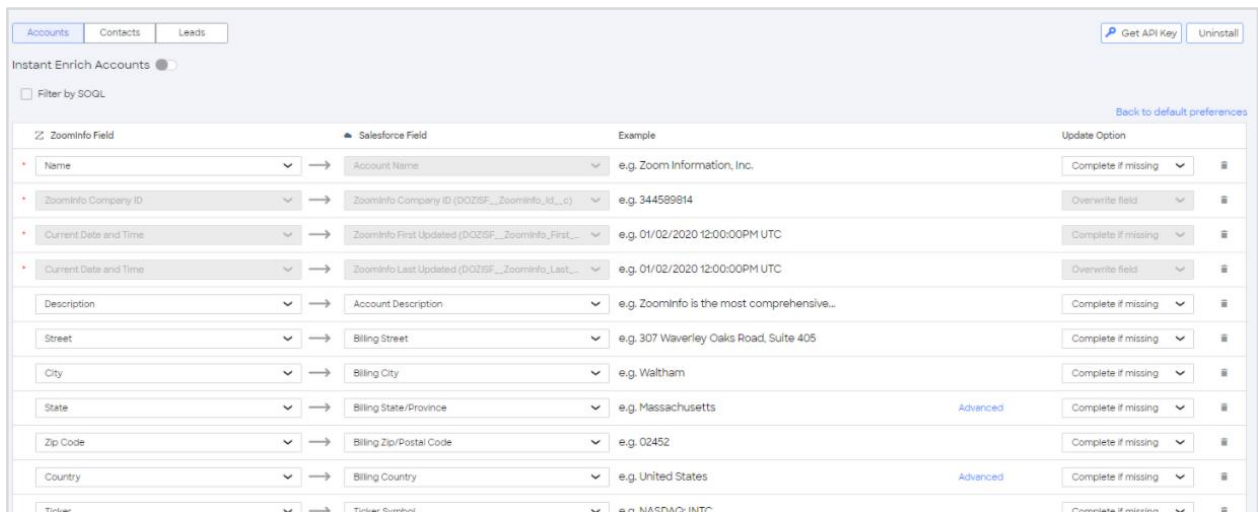
Note: Disable your browser's pop-up blocker if you did not see the Salesforce window display.

- After successfully connecting to Salesforce, the Salesforce tile will display a **Manage** option.



- Click **Manage**.
- Click **Get API Key** to generate a one-time-use private key for configuring the Instant Enrich application in your Salesforce environment.

Important: Clicking this link deactivates any prior API Keys for Instant Enrich integration.



- Copy the API Key to your clipboard and click **OK**.

API Key:

```

-----BEGIN RSA PRIVATE KEY-----
MIIEowIBAAKCAQEAgYq2VaZQDDLOJvUbGpfix2EVvJNAAbHS+v+YYNI3WAOjbcA
+sQN0qWpYBHQk6L1hvif8+CXT1J6I5wYyG2LoTGf0Yduaug1Q1JCYiJ6I7nF/C9
cl9ZQuCYQOeCbvYmdTlrKlCx3PtZaKWOrEU0pVj9lbq38m+3VS0ACfyYc3lwr9rJ
fgQQilq4epSBKqweGxkZDkux0OSe1IVU3Z9krhPT03hQWri0KgNpYm6S9AWfeR9z
tzn3wVfJJU9YkcFd2cfcU6LxDSxM+np/TOQnpLcee1s1ZKexd/eSZjVmb6TdkA5i
6wTo4+VjpuvPzhCBPDKNmZwcTFitHCcuHwZUOQIDAQABAoIBAQCAC69LQ5MbpJR
R7
Ov2ZdsiYp7dhSE6wIRBu+kbIPPEVZ/HelxGjf9Cd7n7fHV0B0pl2LSPLK56Ks/Q
LxK8pcVRAJUn/1j/+p4CyskAcuGFEAtPWSi/x/o2w5zj10Q9OD5H9dAAefS5j3Cl
5BNcwTdGw40ElakF5cbYPwPF7JywdhFZR04LDyXG6ioMNB8kec1eS8rTWCrOlsyk

```

This private key is available for one time use. Copy and upload to the custom metadata type named **JWT Setting** in your Salesforce environment.

[Copy Key](#) [OK](#)

- Log into your connected Salesforce environment with the dedicated user that created the Instant Enrich connection.
- Under **Salesforce Setup**, navigate to **Custom Metadata Types**.
- Locate the custom metadata type named **JWT Setting** created by the ZoomInfo package and click **Manage Records**.

All Custom Metadata Types [Help for this Page](#)

Custom metadata types enable you to create your own setup objects whose records are metadata rather than data. These are typically used to define application configurations that need to be migrated from one environment to another, or packaged and installed.

Rather than building apps from data records in custom objects or custom settings, you can create custom metadata types and add metadata records, with all the manageability that comes with metadata: package, deploy, and upgrade. Querying custom metadata records doesn't count against SOQL limits.

[New Custom Metadata Type](#)

Action	Label	Installed Package	Namespace Prefix	Visibility	Api Name	Record Size	Description
Manage Records	JWT Setting	ZoomInfo	DOZISF	Public	DOZISF__JWT_Setting__mdt	814	

- In **JWT Settings**, find the label **zi-auth** and click **Edit**.

JWT Settings

View: [All](#) [Create New View](#)

[New](#)

Action	Label	JWT Setting Name	Namespace Prefix
Edit	zi-auth	zi_auth	DOZISF

- Replace the default text in the **Private Key** field with the API Key you copied.

JWT Setting (Managed) Help for this Page

This JWT Setting is managed, meaning that you may only edit certain attributes. [Display More Information](#)

JWT Setting Edit Save Save & New Cancel

Information = Required Information

Label	<input type="text" value="zi-auth"/>	Namespace Prefix	DOZISF
JWT Setting Name	<input type="text" value="zi_auth"/>	Private Key	<pre> -----BEGIN RSA PRIVATE KEY----- MIIEpQIBAAKCAQEA19CKNoRZ6CC27T m9AWO1yWWSxVBxdgKPx4lp9mpps+th+ V+EXRrQcYYZE/rAr5FJ0xeW7bhH9opDR 80wN88bGpLmqORAdl06aY9iGQcpUc qCp7l5qK1SLk80s1h1Fnq8yZPperoW90 pChKSlouugPAQz1Fn4RGXpcJUmzSH hNKNHhYX3z3IQNZMPDF8yEW9ZshSivc Ak1UkzX1uudrievCPu0YVeRYnSuUVNn 3/3KOp0g0w2CYOpkYB/De9E+36oaHM51 MG9+8iVxUAYXmyE3HvWBRJaNDFal.81 HBQh9z6TToMDixN1fdK1YCSBwEP4G7Jb Hl5fwIDAGABAoiBACPE0xfWEkik02y x+x911TVR/mdxkHj4K1fRoxrRW+-VLaiN3 rLY044rPwD0iq7qSAYJnloilG5n00 VW8Nvrl4N1ID/NfzextPwBMM4vnuDdl e5nkKce9R8sYoyGWce93U91TEPsm2 ElhovWQH2hVZZm9L0wEKZ9UJmI2mUq QxulaTOHYU9w5+xaAutlUtqDSNP0Gd/ </pre>
User Name	<input type="text" value="user@example.com"/>		

Save Save & New Cancel

- Replace the default text in the **User Name** field with the ZoomInfo username that generated the API key, and click **Save**.

Configure Instant Enrich

1. Click **Manage** under the Instant Enrich Salesforce tile.

Accounts | **Contacts** | Leads Get API Key | Disconnect

Instant Enrich Contacts

Filter by SOQL

Select Accuracy Score for Enrichment ⓘ
Enrich records with an accuracy score of 75 and above

[Back to default preferences](#)

ZoomInfo Field	→	Salesforce Field	Example	Update Option
Last Name	→	Last Name	e.g. Nir	Comple...
Zoominfo Contact ID	→	Zoominfo Contact ID (DO2)	e.g. 1645938489	Overwrit...
Zoominfo Company ID	→	Zoominfo Company ID (D)	e.g. 344589814	Overwrit...
Current Date and Time	→	Zoominfo First Updated (D)	e.g. 01/02/2020 12:00:00PM UTC	Comple...
Current Date and Time	→	Zoominfo Last Updated (D)	e.g. 01/02/2020 12:00:00PM UTC	Overwrit...
First Name	→	First Name	e.g. Hila	Comple...
Job Title	→	Title	e.g. Vice President of Marketing ...	Comple...
Contact Street	→	Mailing Street	e.g. 307 Waverley Oaks Road, Sui...	Comple...

2. Select the object type you want to enrich (**Accounts**, **Contacts**, or **Leads**).

For Contacts or Leads, you can 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".

3. Enable or disable enrichment by clicking the **Instant Enrich <object_type>** toggle.
4. Optionally, select **Filter by SOQL** to add a Salesforce Object Query Language (SOQL) query to filter on. When a net new record is created in Salesforce, the filter is checked to determine whether the record should be enriched or not.

Z Accounts | Contacts | Leads Z

Instant Enrich Accounts

Filter by SOQL
Enrich accounts Where

Validate

A SOQL filter is useful in organizations with multiple sales teams, providing better control over which net new records in Salesforce are instantly enriched based on the filter.

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

[Back to default preferences](#)

ZoomInfo Field	Salesforce Field	Example	Update Option
Name	Account Name	e.g. Zoom Information,...	Complete if mi...
ZoomInfo Comp...	ZoomInfo Com...	e.g. 344589814	Overwrite field
Current Date an...	ZoomInfo First ...	e.g. 01/02/2020 12:00:0...	Complete if mi...
Current Date an...	ZoomInfo Last ...	e.g. 01/02/2020 12:00:0...	Overwrite field
Description	Account Descri...	e.g. ZoomInfo is the m...	Complete if mi...
Street	Billing Street	e.g. 307 Waverley Oaks...	Complete if mi...
City	Billing City	e.g. Waltham	Complete if mi...
State	Billing State/Pro...	e.g. Massachusetts Advanced	Complete if mi...
Zip Code	Billing Zip/Posta...	e.g. 02452	Complete if mi...
Country	Billing Country	e.g. United States Advanced	Complete if mi...
Ticker	Ticker Symbol	e.g. NASDAQ:INTC	Complete if mi...

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

Salesforce Field: Select the Salesforce 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 Salesforce administrator to understand field mapping and update options to ensure records are enriched as expected.
- Set all standard Salesforce 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.

6. Click **Verify and Save**.

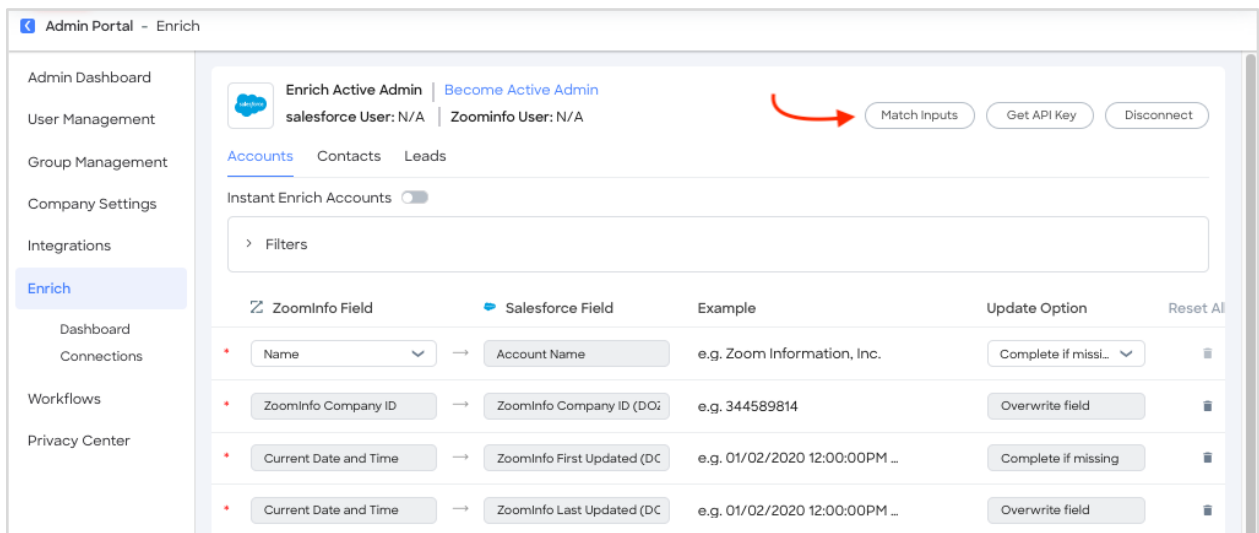
Customize Match Inputs

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

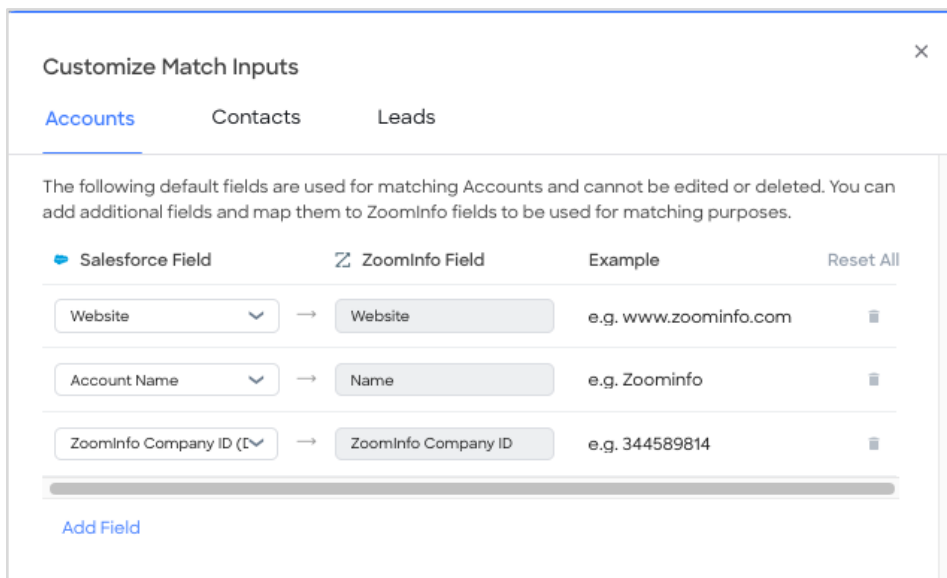
Each object type (e.g., **Accounts**, **Contacts**, and **Leads**) has a set of default fields that ZoomInfo uses to match in Salesforce. Although you cannot change the default ZoomInfo fields, you can include additional ZoomInfo fields on which to match - giving you more data accuracy control when enriching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

To customize match inputs for your Enrich object types:

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



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



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 Salesforce.
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

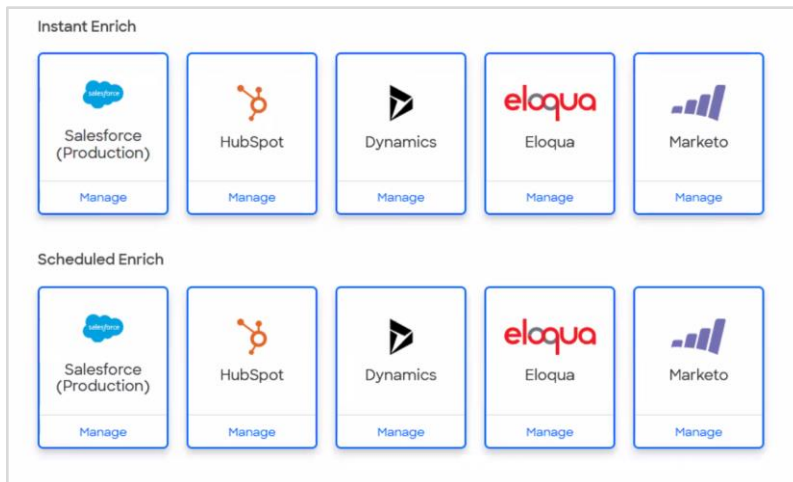
This section describes how you can manage the connection over time, including changing the Enrich Active Admin (for example, due to a departure or re-org), or disconnecting the Enrich integration.

Change Enrich Active Admin

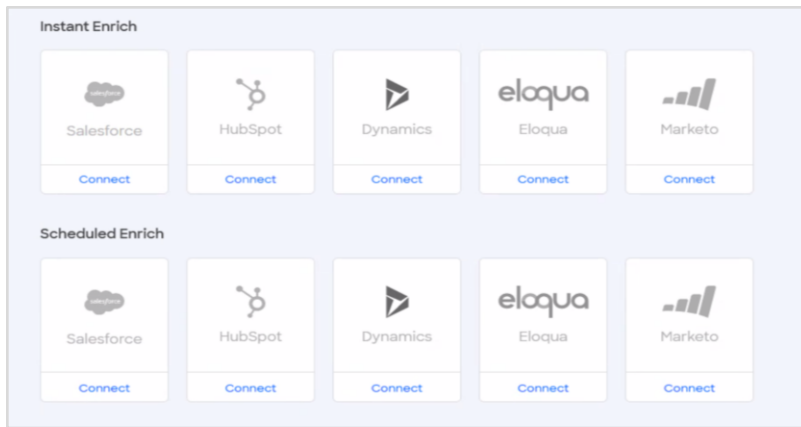
Enrich administrators must have full administrative privileges in Salesforce. The Enrich administrator must also have an Admin Portal seat on the ZoomInfo platform.

To change the Active Admin for Enrich:

1. Ensure you are logged in to Salesforce 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 Salesforce and click **Manage**.

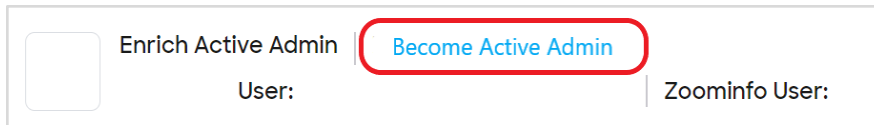


Note: If the tile is not in color and says **Connect** you will need to follow the prompts for connecting your ZoomInfo Admin seat to your Salesforce instance.

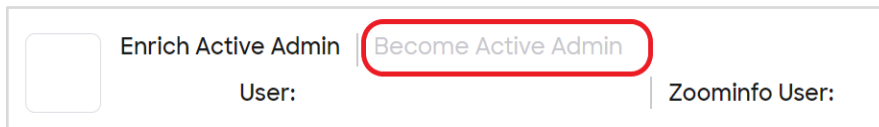


For additional information on how to connect Enrich for Salesforce see the [ZoomInfo Integrations Resource Matrix](#).

- 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 Salesforce User shows the email address of the current Salesforce administrator connected to Enrich.
- ZoomInfo User shows the ZoomInfo administrator logged into the ZoomInfo platform through the Admin Portal.

Disconnect ZoomInfo From Salesforce

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

Enrich Dashboard

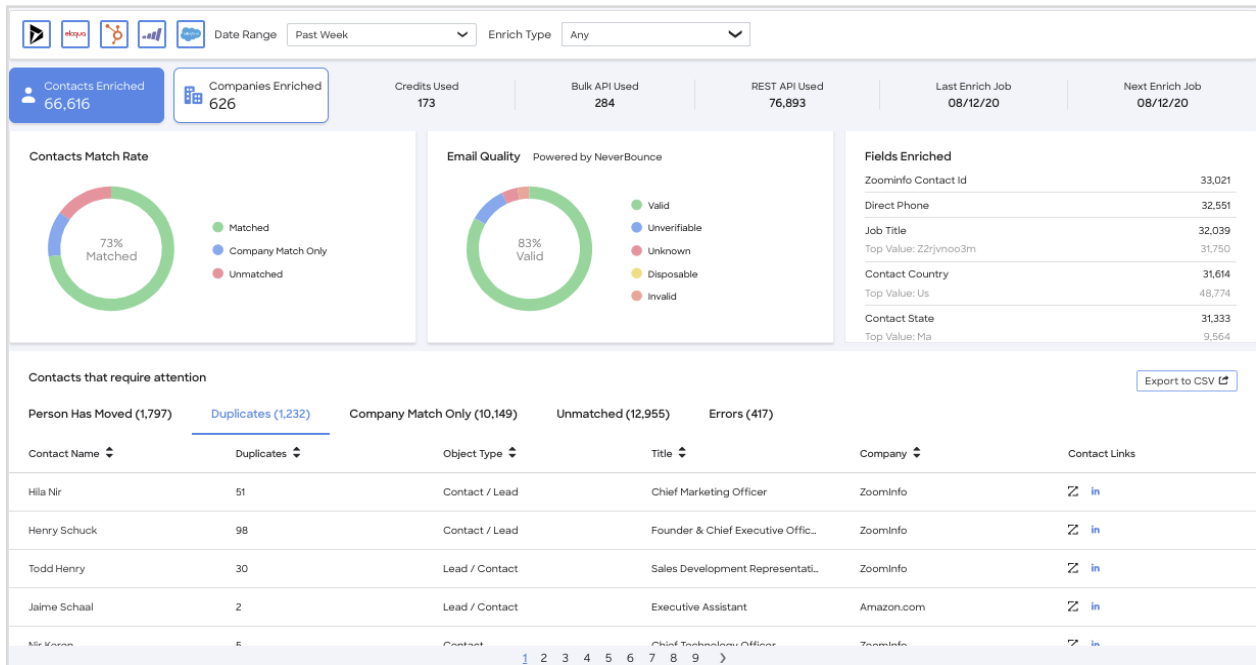
As a ZoomInfo admin, the Enrich dashboard gives you a detailed graphical view of how Scheduled Enrich has impacted the quality and depth of data for your connected CRM and marketing automation integrations.

Access the Enrich Dashboard

- 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.

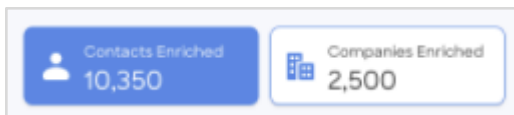


Using the Dashboard

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

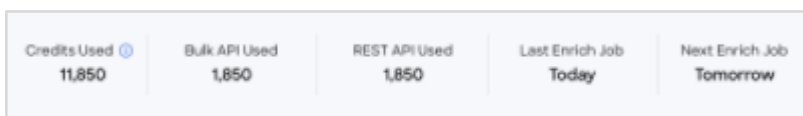
View Contact and Company Enrich Statistics

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.

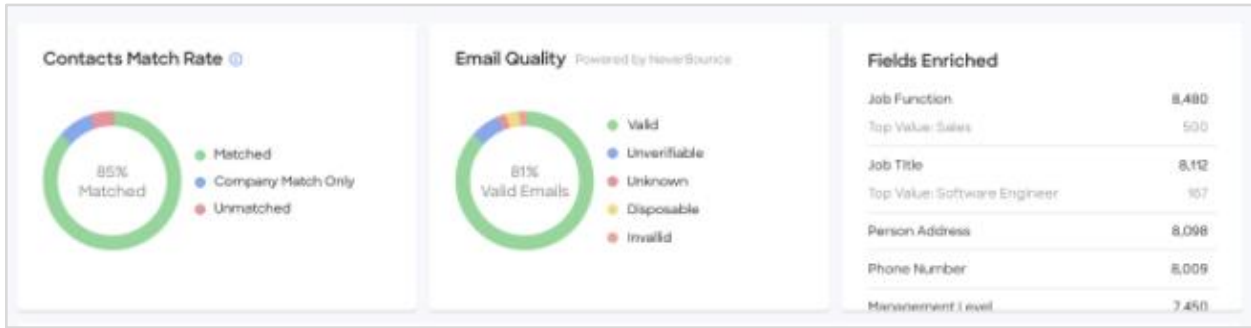


View Match Rate, Email Quality and Fields Enriched

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	Zoominfo	in
Henry Schuck	98	Contact / Lead	Founder & Chief Executive Offic...	Zoominfo	Zoominfo	in
Todd Henry	30	Lead / Contact	Sales Development Representat...	Zoominfo	Zoominfo	in
Jaime Schaal	2	Lead / Contact	Executive Assistant	Amazon.com	Zoominfo	in
Nir Keren	5	Contact	Chief Technology Officer	Zoominfo	Zoominfo	in

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

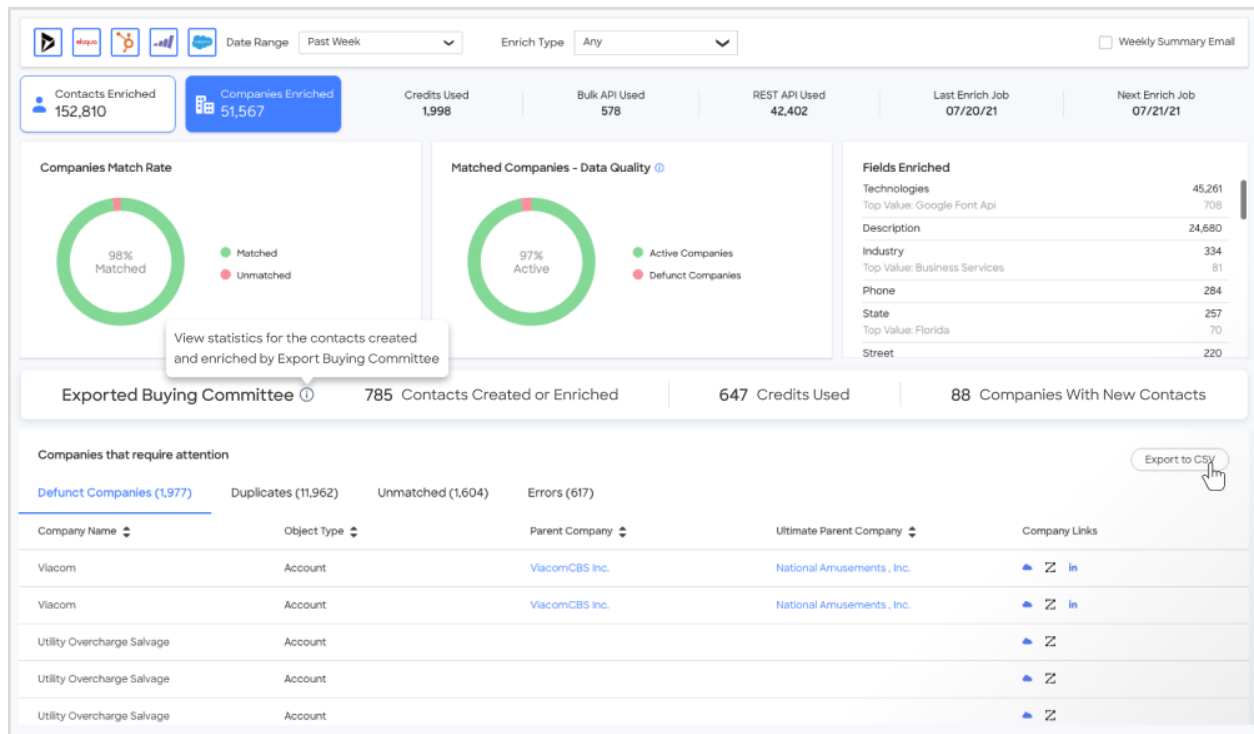
Discrepancies are categorized to help you manually investigate and resolve issues and export lists.

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.

View Exported Buying Committee Statistics

The Enrich Dashboard also tracks the contacts that are created and enriched if you've [enabled the Export Buying Committee feature](#).



The details include:

Contacts Created - Total number of Unique Contacts Created or Enriched as part of the Export Buying Committee feature

Credits Charged - Total number of credits charged by the Export Buying Committee feature

Accounts with New Contacts - Total number of Accounts that have at least 1 new contact created or enriched by the Export Buying Committee feature

API Considerations

After successfully matching to ZoomInfo profiles, records are updated by leveraging the Salesforce Bulk API.

Salesforce provides a limit for the number of API calls which can be used by an organization.

- Check with Salesforce support to confirm how many API calls your organization has access to (daily limits).
- Take into account the other integrations you are using that also use Salesforce's API.
- Note that additional API calls are made during job configuration, such as when loading CRM fields for mapping.

Scheduled Enrich: When a job is initiated in Scheduled Enrich, Salesforce records are queried using the Salesforce Bulk API in batches. By default, records are processed in batches of 10,000.

You can choose to configure a smaller batch size to 1,000, 500, or 200. Note the following considerations:

- A larger batch size results in less calls to the Salesforce Bulk API.
- Reducing the batch size will lead to increased Salesforce API call consumption.

Instant Enrich: With Instant Enrich, ZoomInfo will use two (2) API calls per record enriched.

- The first API call is used to check the field values existing on the record. This check is made to confirm if the field is blank or contains a value (done for the Update Option behavior).
- The second API call is used to update the contact or company record with ZoomInfo data.