Hubspot Integration Guide for Engage

For administrators setting up the ZoomInfo Engage integration with Hubspot

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

Intended Audience

This guide is intended for ZoomInfo Engage administrators tasked with managing Engage and the integration with Hubspot for users in their organization.

Connect to HubSpot

As an Engage admin, you connect to your HubSpot instance when completing the onboarding wizard, establishing the initial connection.

Before your users connect, configure the HubSpot integration settings including:

- Behavior when contacts are imported or created in Engage
- Activity sync settings
- Field mapping for contacts and accounts.

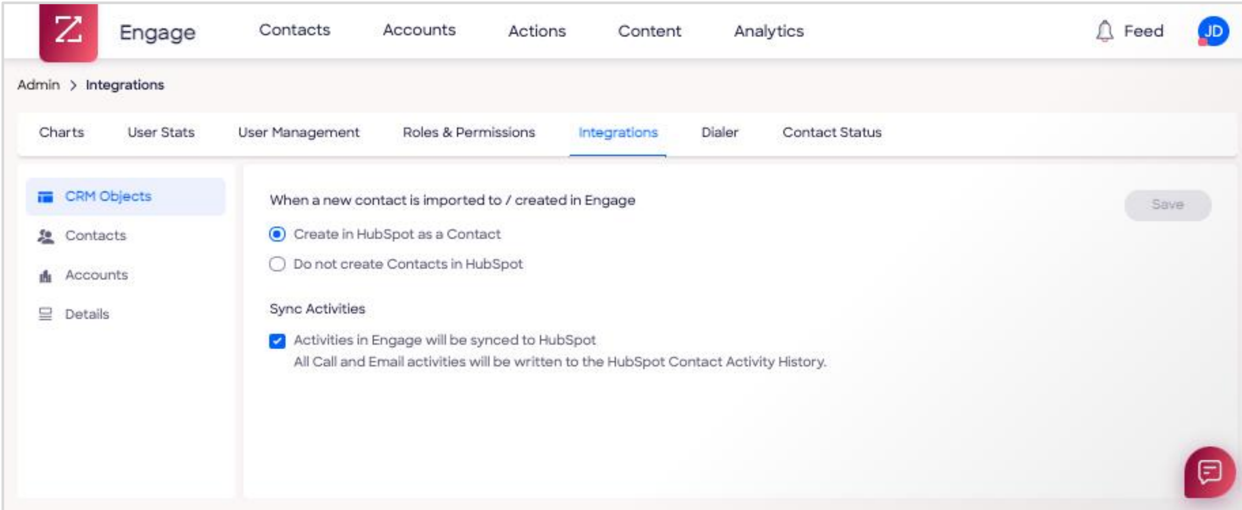
Configure HubSpot Integration Settings

The HubSpot integration eliminates manual logging of call and email activities and increases transparency into synced contacts with the Engage HubSpot integration.

- Changes made in Engage to the **Status** and **Do not email** fields are also synced to HubSpot. All other Engage contact detail fields are read-only.
- As an admin, you can choose whether new contacts imported/created in Engage should also be created in HubSpot, which reduces duplicate data entry and list imports.

The **CRM Settings** tab gives you control over how information is synced between Engage and HubSpot.

1. Click your user account icon and select **Admin**.
2. Click the **Integrations** tab.



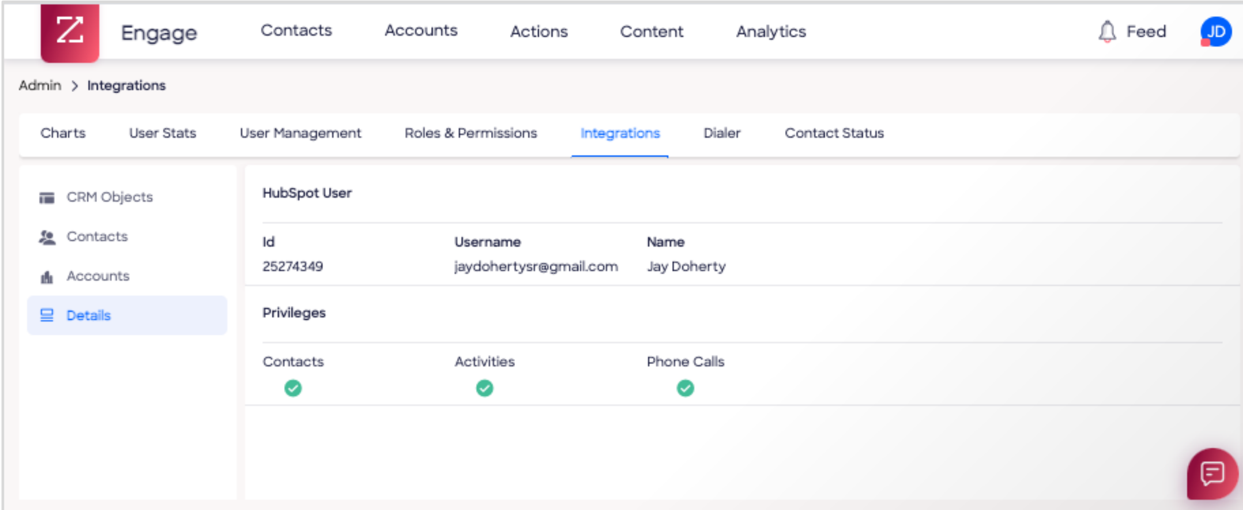
3. Configure the **CRM Objects** settings:
   - Choose to **Create in HubSpot as a Contact** (default) or **Do not create Contacts in HubSpot** when a new contact is created or imported to Engage.
   - Choose to enable (default) or disable the **Activities in Engage will be Synced to HubSpot** setting. When enabled, email and call activity in Engage will be synced to HubSpot.
4. Click the **Contacts** tab to configure mapping between Engage fields and HubSpot fields.

   All Engage contact detail fields are read-only except for the following fields which are synced to HubSpot if changed in Engage:
   - **Status** field for contacts
   - **Do not email** field

   Tip: Map the **Engage Status** field to a corresponding HubSpot **Lead Status** field. When the contact's status is updated in either platform (for example, a contact moves from 'Open' to 'In Progress'), the change will be reflected in both platforms.

5. Click the **Accounts** tab to configure mapping of Engage Account fields to HubSpot Company fields, enabling these details to be displayed in both Engage and HubSpot.

   Note: HubSpot Company details in Engage Accounts are currently read-only.
6. Click the **Details** tab to review your settings.



Instruct Users to Connect to HubSpot

After you configure HubSpot integration settings, you can then instruct your Engage users to make their own connection.

Important: Engage users can only connect to the specific HubSpot instance established by the admin's initial connection, identified by a **Tenant Name** and **Org ID**. Connecting to any other instance is not supported.