

Lever Integration Guide for ZoomInfo Talent

For administrators setting up the ZoomInfo Talent integration with Lever

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

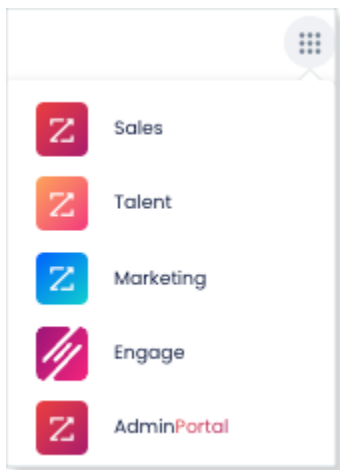
To get connected:

1. A ZoomInfo Talent admin establishes the connection to Lever and configures export and custom mapping settings for their organization.
2. The admin enables the integration for their organization's users.
3. Users are connected to Lever and can begin exporting candidates.

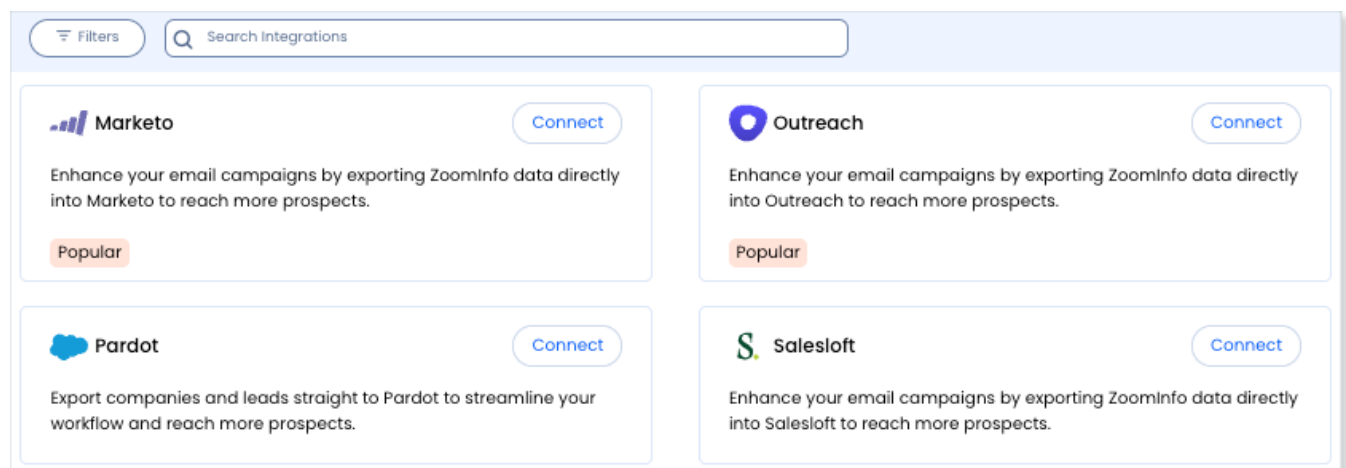
Configure the Connection

A ZoomInfo Talent admin with **Super Admin** access to Lever establishes the connection between ZoomInfo Talent and Lever that all other ZoomInfo Talent users will use.

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



2. Click **Integrations**.



3. Use the **Filters**, or **Search integrations** options to find your integration.

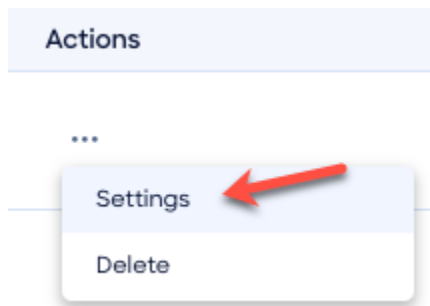
4. On the tile for your integration, click **Connect**.
5. Complete the connection using your credentials.

Configure Integration Settings

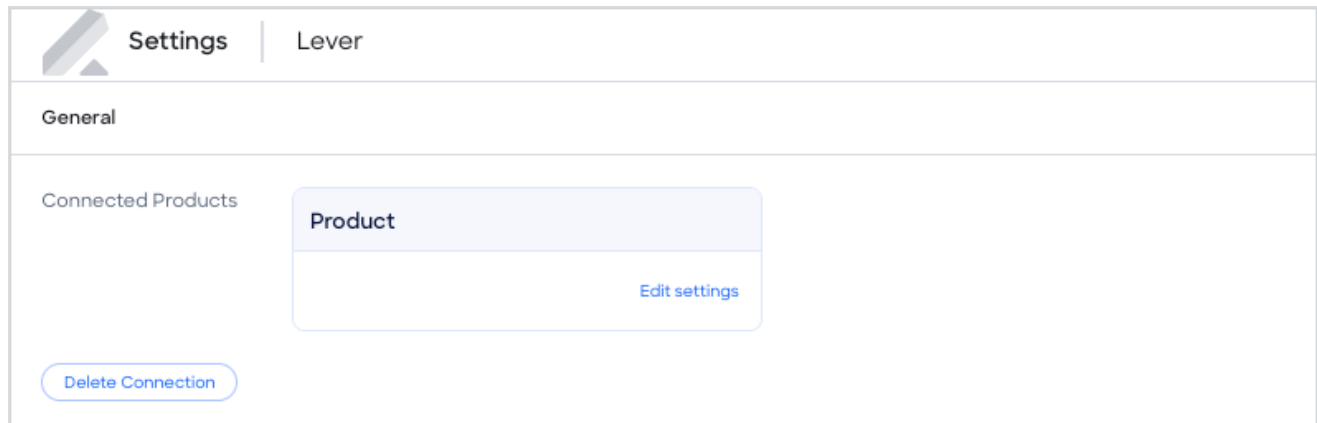
Once your integration is connected, you can configure the settings, including export preferences and mapping:

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.

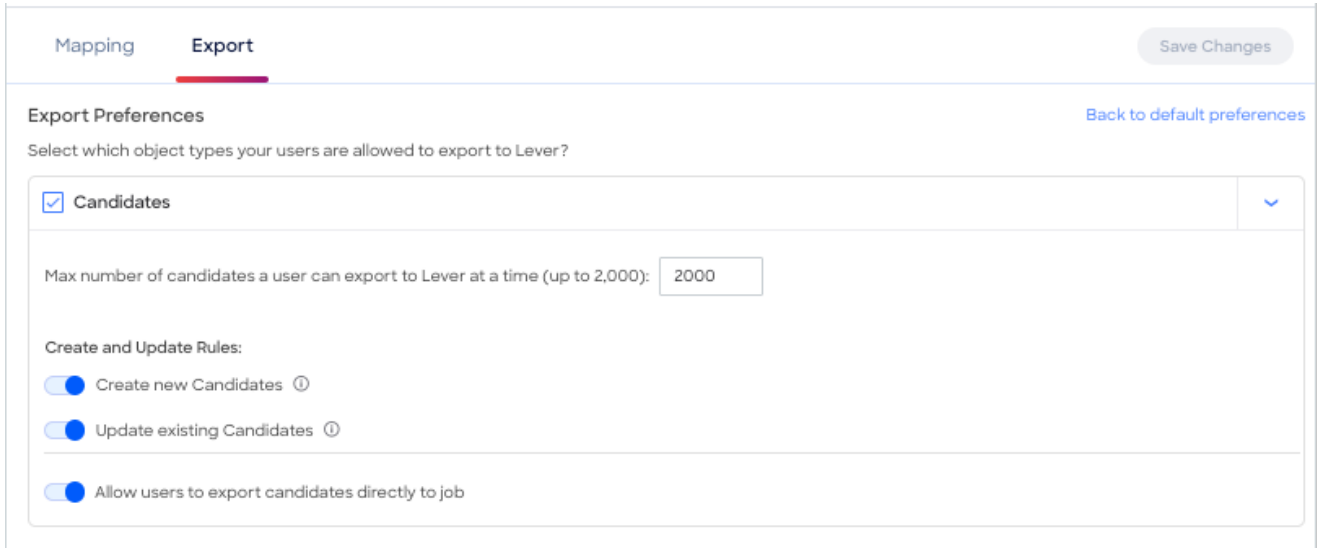


From this page, click **Edit settings** to begin configuring your integration.

Configure 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 Lever as Candidates.



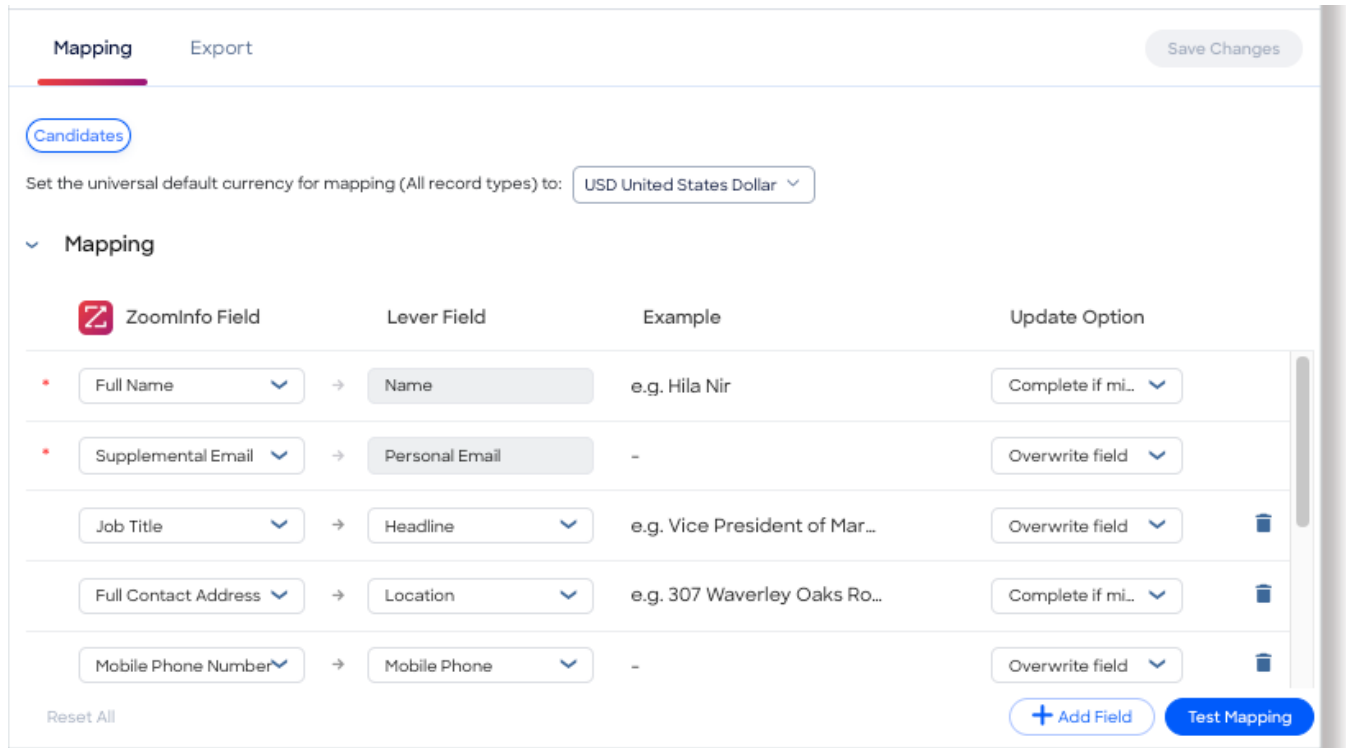
The screenshot shows the 'Export Preferences' configuration page in ZoomInfo. At the top, there are two tabs: 'Mapping' and 'Export', with 'Export' being the active tab. A 'Save Changes' button is located in the top right corner. Below the tabs, the page title is 'Export Preferences' with a link 'Back to default preferences' on the right. The main heading is 'Select which object types your users are allowed to export to Lever?'. There is a list of object types with a checkbox for 'Candidates' which is checked. Below this, there is a text input field for 'Max number of candidates a user can export to Lever at a time (up to 2,000):' with the value '2000' entered. Underneath, there is a section titled 'Create and Update Rules:' with three toggle switches, all of which are turned on: 'Create new Candidates', 'Update existing Candidates', and 'Allow users to export candidates directly to job'.

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.

Configure Custom Mapping

Click the **Mapping** tab.




On the **Mapping** tab, use the **Candidates** tab to review the default mapping and make any changes.

Field	Description
ZoomInfo Field	Available ZoomInfo fields. Required fields are marked with an asterisk (*).
Lever Field	Available Lever fields. These fields are retrieved directly from your Lever instance.
Update Options	Select an option: <ul style="list-style-type: none">● Complete if missing (default) - Only complete with ZoomInfo data if none exists in Lever.● Overwrite field - Overwrite existing data in Lever 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.

Personal Phone and Email Mapping

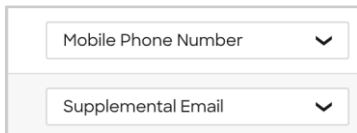
The default mapping for the Lever integration for ZoomInfo Talent is specific to talent acquisition use cases. For example, the phone and email mappings for contacts are focused on personal contact information instead of business contact information.

In ZoomInfo:

- A contact's business email address is stored in the **Email Address** field, and the personal address is stored in the **Supplemental Email** field.
- A contact's business phone number is stored in the **Phone** field, and the personal phone number is stored in the **Mobile Phone Number** field.

In ZoomInfo Talent:

Because recruiters typically want to engage with candidates through personal channels, we have included the **Mobile Phone Number** and **Supplemental Email** fields in the default mapping.



The image shows two dropdown menus stacked vertically. The top menu is labeled 'Mobile Phone Number' and the bottom menu is labeled 'Supplemental Email'. Both menus have a downward-pointing chevron icon on the right side.

If you want to also map the business email and phone number, you can click **Add Row** and map the ZoomInfo **Email Address** and **Phone** fields to corresponding fields in your integration.

Set a Hierarchy for ZoomInfo Data Within a Single Lever Field

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



The image shows two rows of mapping configuration. The first row shows a dropdown menu labeled 'Supplemental Email' with a downward chevron, followed by a right-pointing arrow, and then a dropdown menu labeled '1 Email' with a downward chevron. The second row shows a dropdown menu labeled 'Email Address' with a downward chevron, followed by a right-pointing arrow, and then a dropdown menu labeled '2 Email' with a downward chevron.

In this example:

- When contacts are exported to Lever, **Supplemental Email** will map to **Email**.
- If a contact has both a **Supplemental Email** address and business **Email Address** in ZoomInfo, the first occurrence of the Lever field will be denoted with number 1, and the second will be number 2.
- If a specific contact does not have a **Supplemental Email** in ZoomInfo, we will send the business **Email Address** field to the **Email** field in Lever.

Test and Save

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

+ Add Field

Test Mapping

- 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.

✖ All fields must be filled. ✖

Adjust the settings and click **Test Mapping** again.

- If the test is successful, a notification displays.

✔ Contact mapping has been tested successfully. ✖

After performing a successful test mapping, click **Save Changes**.

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

✖ All fields must be filled. ✖

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

- If mappings are correctly configured, a success notification displays.





✔ Contact mapping was saved successfully. ✖

View and Manage Connected Integrations

Once you've connected one or more integrations, you can view and manage them on the **Connected** tab of the **Admin Portal > Integrations** page.

Connected 19 All Integrations + New Integration

To maximize your experience, ZoomInfo now connects with the apps and products your organization is already using. Search, add, and manage your integrations here.

Integration Name	Date Connected	Category	Actions
<input checked="" type="checkbox"/>  PC Recruiter	Jun 13, 2022	ATS	...
<input checked="" type="checkbox"/>  Salesloft	Oct 10, 2022	Sales/Marketing	...
<input checked="" type="checkbox"/>  HubSpot	Oct 31, 2022	CRM	...
<input checked="" type="checkbox"/>  Salesforce	Dec 2, 2022	CRM	...

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

The authentication between ZoomInfo Talent and Lever is done at the organization level. As an admin, once you establish the connection and turn it on for all users, your organization's users are automatically connected and can export to Lever.

1. Add your organization's users under **Admin Portal > User Management**.
2. Under **Admin Portal > Integrations**, enable the toggle on the Lever integration.

All users listed under **Admin Portal > User Management** are automatically connected to Lever and can export candidates as Lever Candidates or add them to a Job.