Microsoft Dynamics Integration Guide for Engage

For administrators setting up the ZoomInfo Engage integration with Microsoft Dynamics.

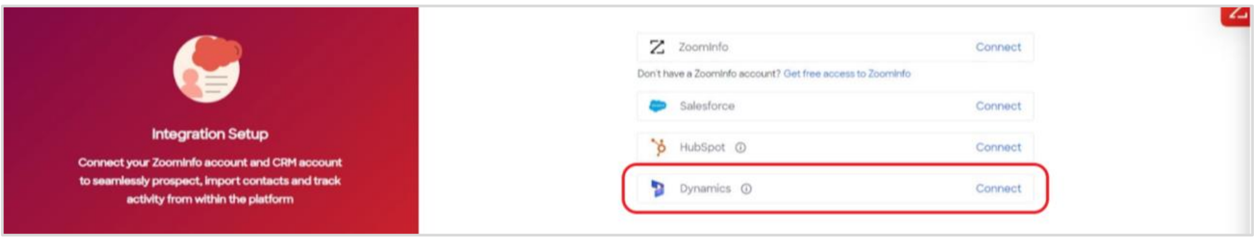
ZoomInfo Engage is a sales engagement platform designed to help maximize your sales teams' productivity, increase effective communications, and streamline your tech stack so your team can close more deals. Engage is a one-stop experience that combines data insights and intelligence, communications, and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

Intended Audience

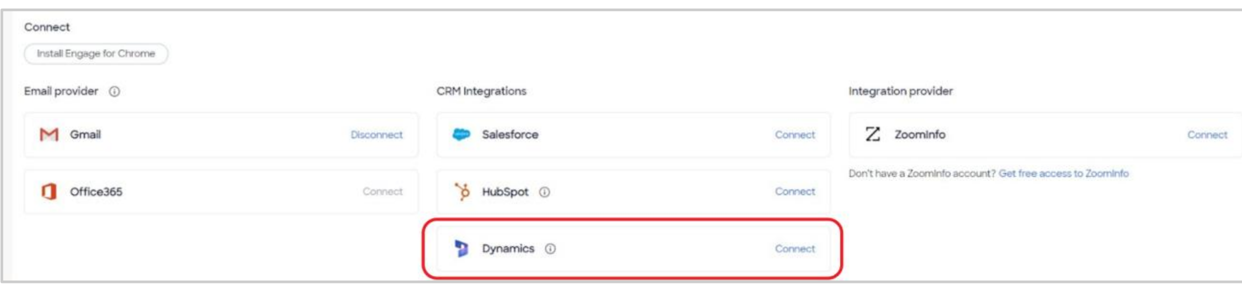
This guide is intended for Engage administrators tasked with managing Engage and the integration with Dynamics for users in their organization.

Connect to Microsoft Dynamics

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

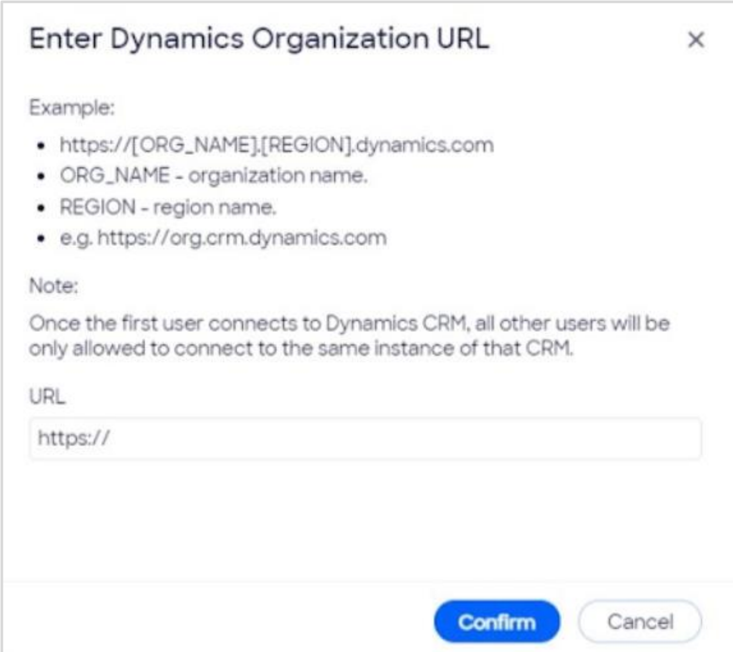


Alternatively you can connect to your Microsoft Dynamics instance by clicking your user account icon in the upper right corner then selecting **My Account > Settings**.



The first user to connect will be prompted to provide your unique Microsoft Dynamics organization URL. Subsequent users who connect to Microsoft Dynamics will not need this information.

Once the first user connects to the Microsoft Dynamics CRM, all other users will only be allowed to connect to the same instance of that CRM with that organization URL.

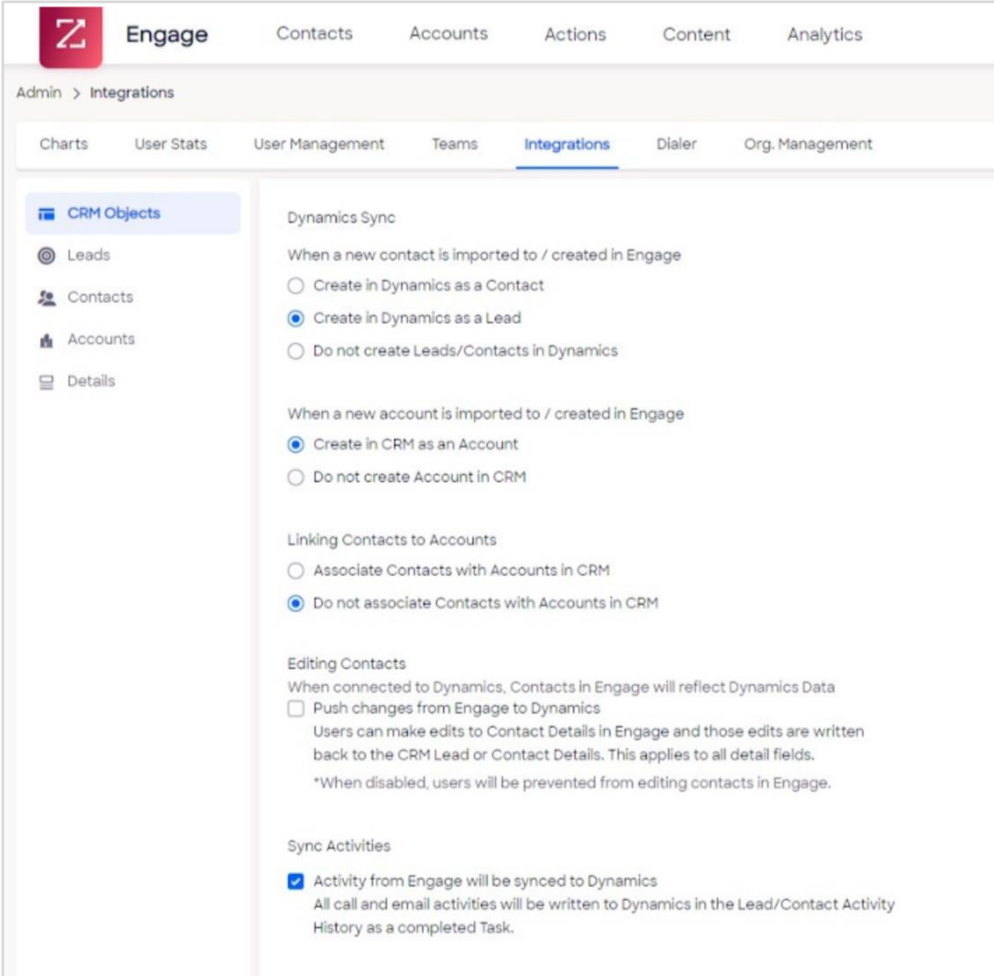


Configure Microsoft Dynamics Integration Settings

The Engage Microsoft Dynamics integration eliminates manual logging of call and email activities and increases transparency into synced contacts.

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

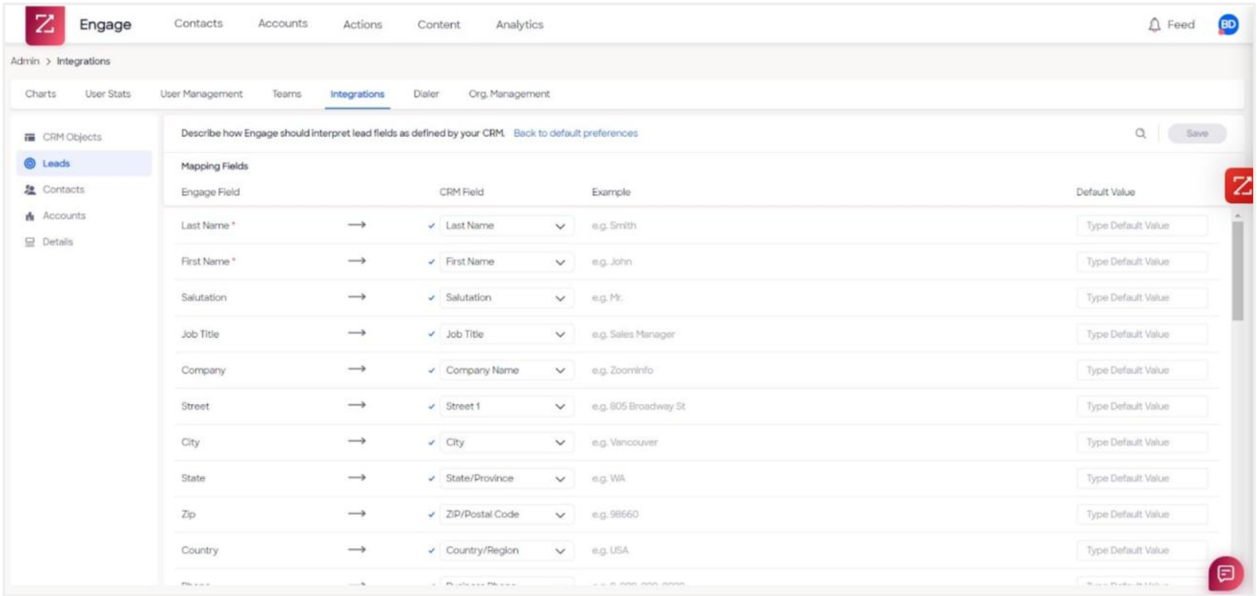
1. Click your user account icon and select **Admin**.
2. Click the **Integrations** tab.



3. Configure the CRM Object settings:

    - Choose to **Create in Dynamics as a Contact** or **Create in Dynamics as a Lead (default)** or **Do not create Leads/Contacts in Dynamics** when a new contact is imported to/created in Engage.
    - Choose to **Create in CRM as an Account** (default) or **Do not create Account in CRM** when a new account is imported to/created in Engage.
    - Choose to **Associate Contacts with Accounts in CRM** or **Do not associate Contacts with Accounts in CRM** (default) when linking contacts to accounts.
    - Choose to enable or disable (default) the **Push changes from Engage to Dynamics** setting. When enabled, contacts in Engage will be synced to Dynamics. When disabled, users will be prevented from editing contacts in Engage.
    - Choose to enable (default) or disable the **Activity from Engage will be Synced to Dynamics** setting. When enabled, email and call activity in Engage will be synced to Dynamics.

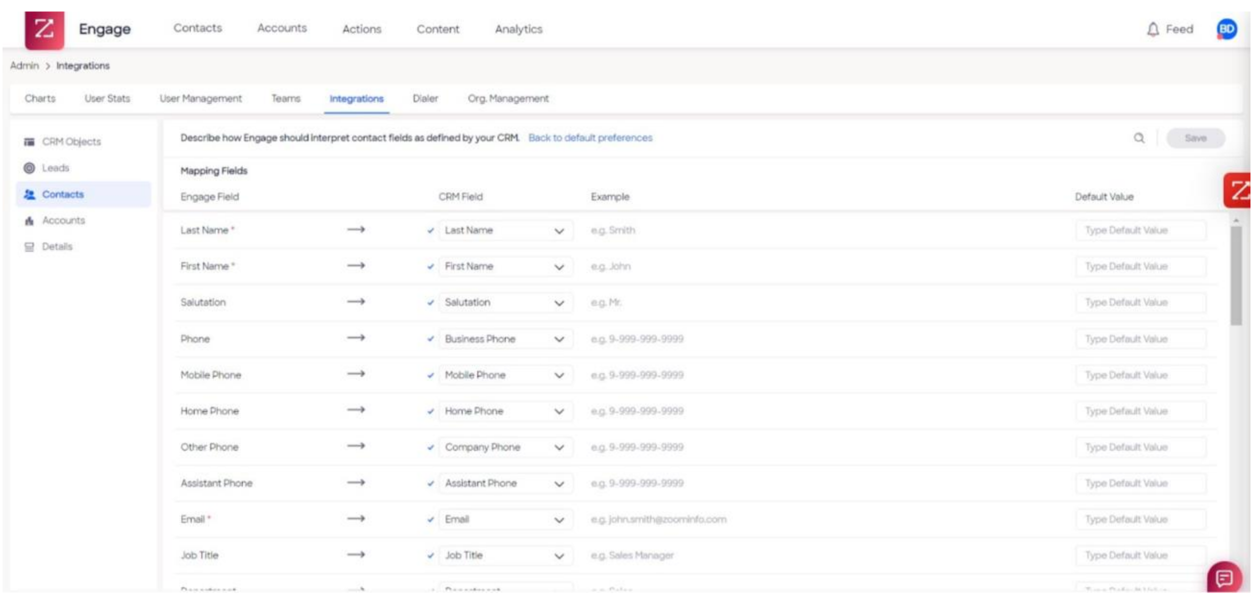
4. Click the **Leads** tab to configure mapping between Engage fields and Dynamics fields. By default Engage will map your standard fields in Microsoft Dynamics. You can also map custom fields.



Tip: By default, the Engage **Status** field is mapped to a corresponding Microsoft Dynamics **Status Reason** field. When the Lead status is updated in either platform the change will be reflected in both platforms.

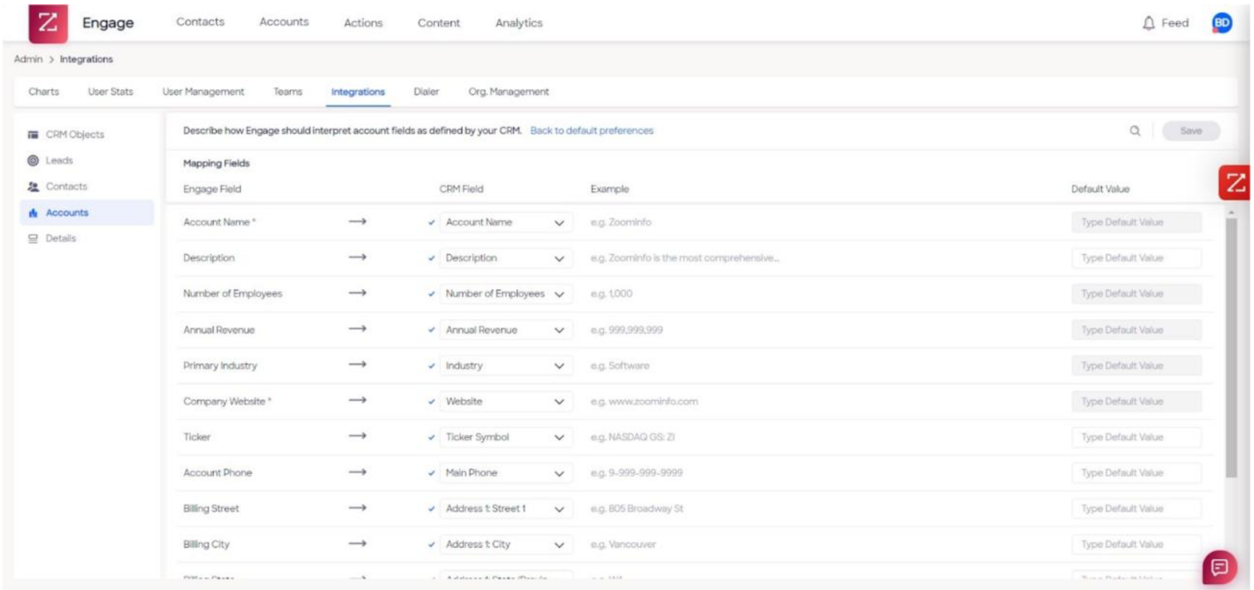
- If you have additional custom fields in Engage, you can map those to any fields you want in Microsoft Dynamics.
- Dynamics Contact does not support the **Status** field. When an Engage Contact is synced to a Dynamics Contact, the **Status** field will not be synced to the CRM.

5. Click the **Contacts** tab to configure mapping between Engage fields and Microsoft Dynamics fields. By default Engage will map your standard fields in Microsoft Dynamics.



Also, if you have additional custom fields in Engage, you can map those to any fields you want inside of Microsoft Dynamics.

6. Click the **Accounts** tab to configure mapping of Engage Account fields to Dynamics Company fields, enabling these details to be displayed in both Engage and Dynamics. By default Engage will map your standard fields in Microsoft Dynamics.



Instruct Users to Connect to Microsoft Dynamics

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

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

1. Click your user account icon and select **My Account**.

2. Click the **Settings** tab.

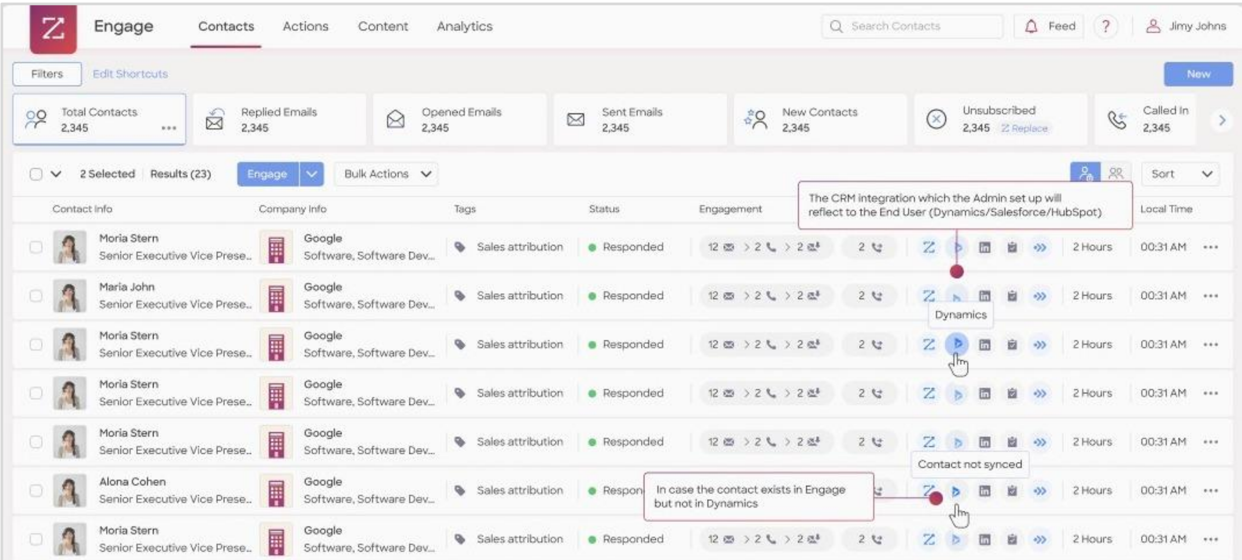
3. Scroll to the **Connect** section and click **Connect** next to Microsoft Dynamics.

4. Provide your Dynamics credentials for the Microsoft Dynamics instance established by your admin and complete the connection. The **Tenant Name** and **Org ID** must be the same as the connection established by your admin.

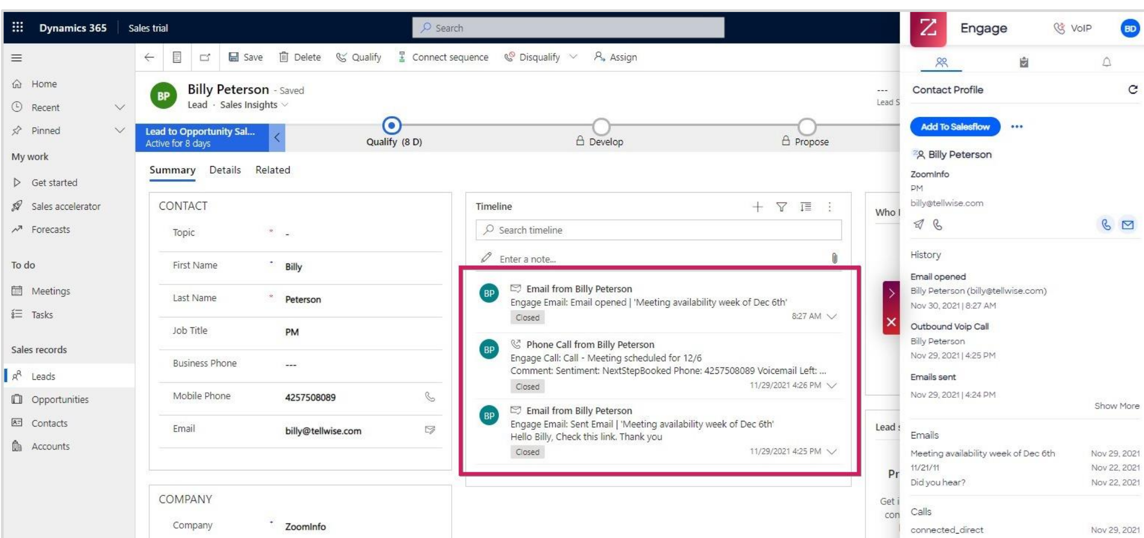
When viewing contacts or leads in Engage you will see Dynamics indicators for each contact or lead.

- A gray icon indicates the contact/lead is not synced. It may also mean that the current user is not connected to Dynamics, but another user in the org is connected.
- A blue icon indicates the contact/lead is synced.

These indicators are shown on both contact/lead lists and the contact/lead card.



For a synced contact/lead, click the Dynamics (blue) icon to open the contact in Dynamics. If your admin has enabled email and call activity logging in Dynamics, you will see activity details synced in Dynamics.



If you unsubscribe a contact/lead in Engage, the contact/lead will be unsubscribed in Dynamics.

Engage Chrome Extension for Microsoft Dynamics

With the Google Chrome extension for Engage you can take action within Microsoft Dynamics without leaving the page.

When viewing a list of contacts, leads, or accounts within Microsoft Dynamics you can use the Engage Chrome extension to take action on data.

1. Once installed, select the Engage plugin icon at the top of the page within Microsoft Dynamics.
2. With the extension open, Engage will automatically load your contacts into the Engage contacts tab.
3. You can immediately begin calling or emailing these contacts.