Microsoft Dynamics Integration Guide

For administrators setting up the ZoomInfo integration with Microsoft Dynamics 365

Get Connected

ZoomInfo admins enable the Microsoft Dynamics integration for users and control user preferences including export settings, custom mappings, and data sharing settings. ZoomInfo users can then connect to Dynamics using their credentials.

Global Admin Requirement

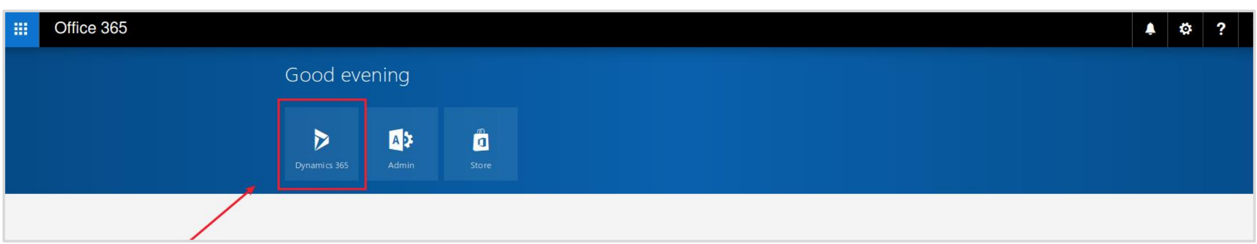
For all team members to utilize this integration, the person establishing the connection must be one of the following:

- A Dynamics admin with Microsoft Global admin permissions
- A Dynamics admin who has coordinated with a Microsoft Global admin to grant prior permission to connect the ZoomInfo integration in the Azure portal. The Dynamics admin can then complete the connection.

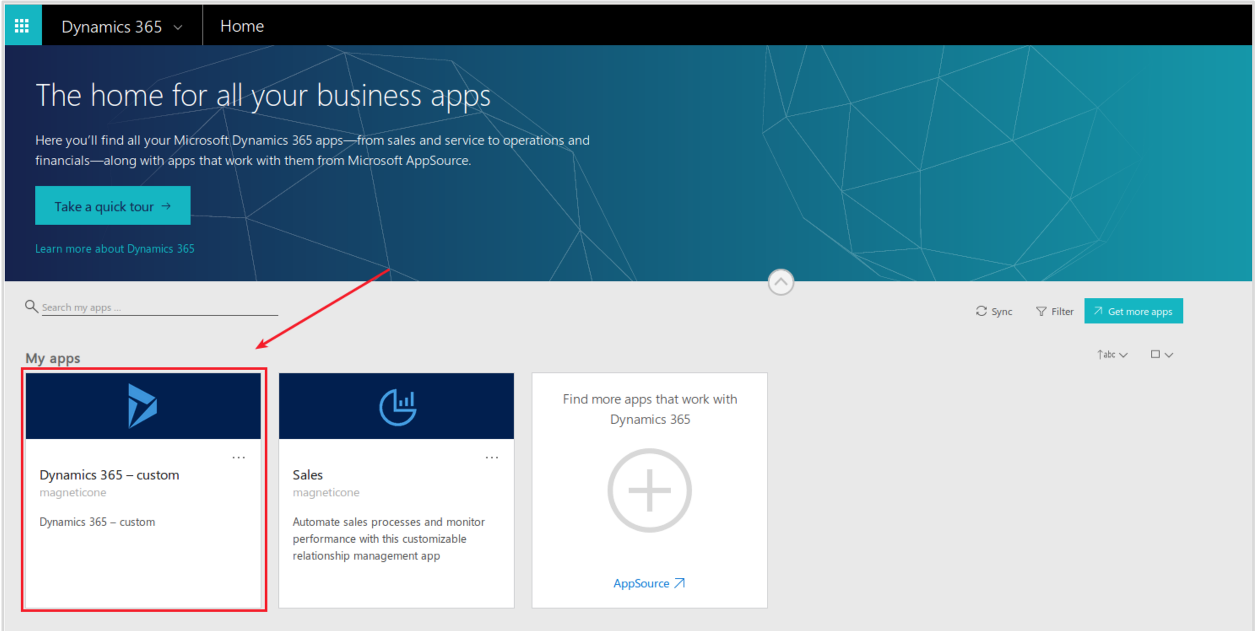
Identify Your Organization URL

You'll need to provide your Dynamics Organization URL as part of making the connection. To obtain this URL:

1. Sign into your Microsoft Dynamics CRM account.
2. Click **Dynamics 365**.



3. Go to **My App** and click **Dynamics 365 - custom**. You are redirected to your Microsoft Dynamics CRM.

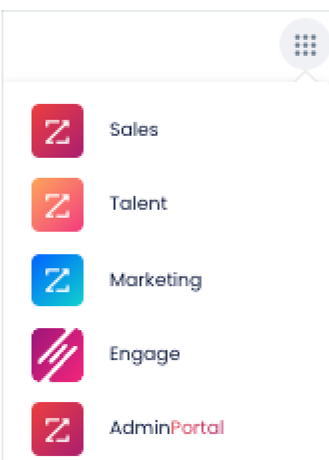


4. Go to your browser address bar and copy the link address (from the beginning of the URL and excluding `/main.aspx/`).

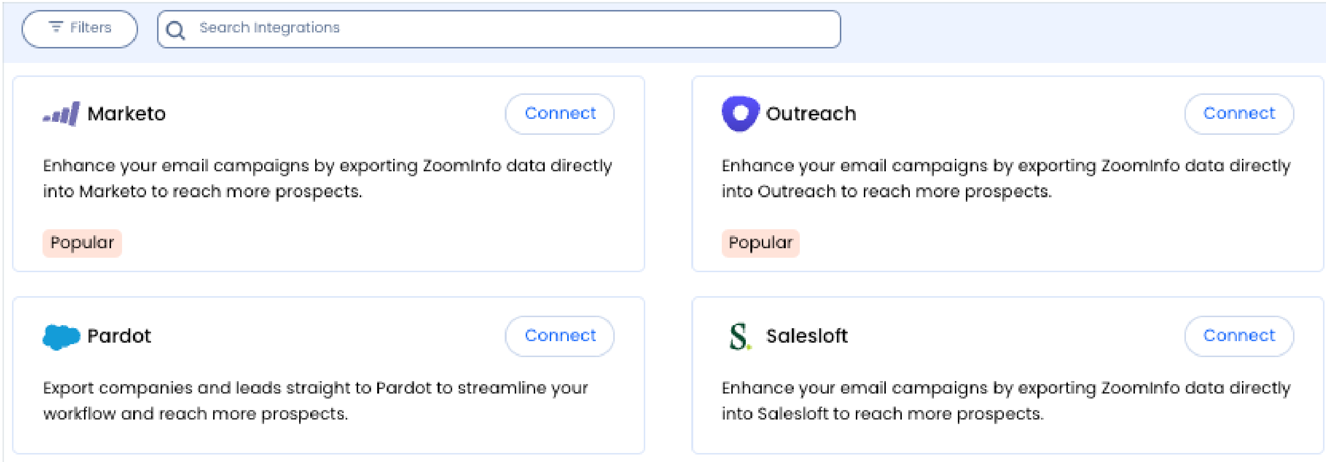
Make the Connection

A ZoomInfo admin with Microsoft Global admin privileges establishes the integration with Dynamics that enables ZoomInfo users to connect and export data to Dynamics.

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



2. Click **Integrations**.

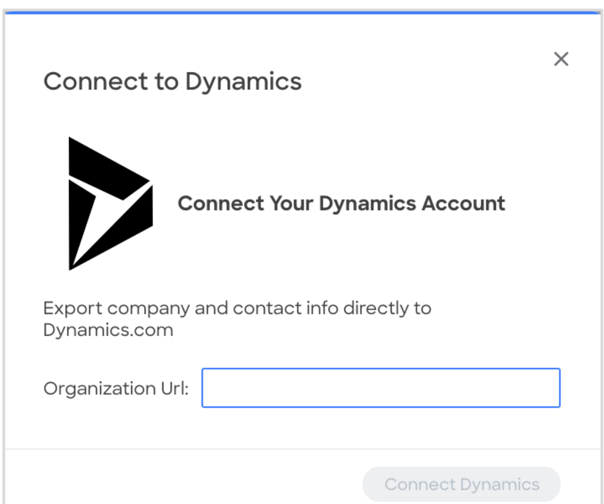


3. Use the **Filters**, or **Search integrations** options to find your integration.

4. On the tile for your integration, click **Connect**.

5. Enter the **Organization URL** found on the Developer Resources page in Dynamics.

   Note: If you're not sure where to find the **Organization URL**, see [Identify Your Organization URL](#).



6. Sign in with your Dynamics credentials.

7. Grant access to all users to be able to connect to Dynamics from ZoomInfo. You will need to be a Microsoft Global admin to do this.

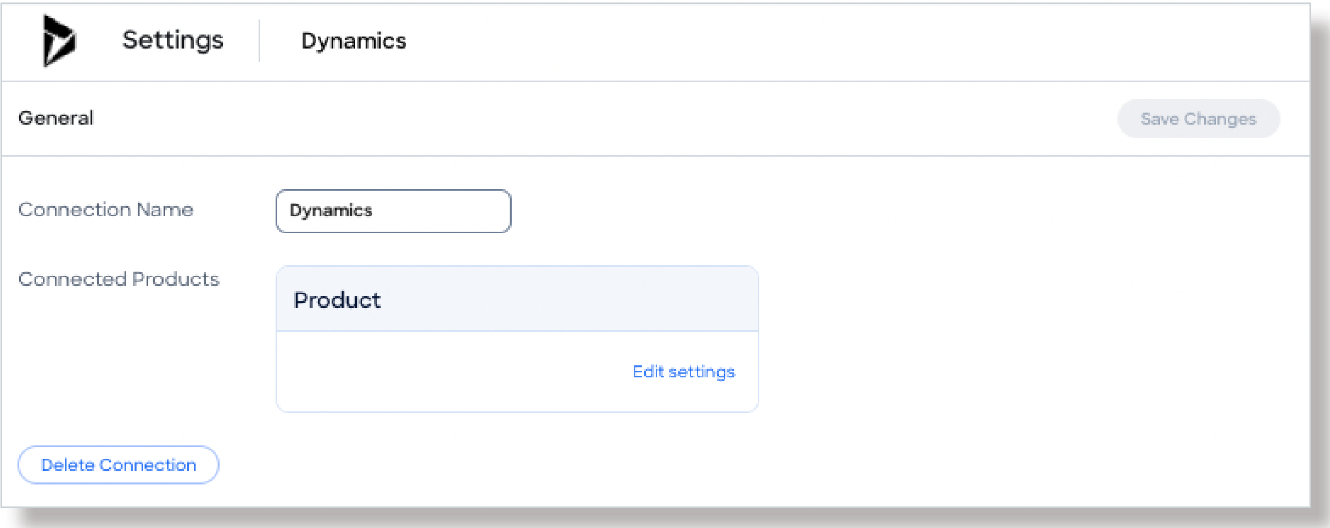
   A success message displays.

Configure Integration Settings

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

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.

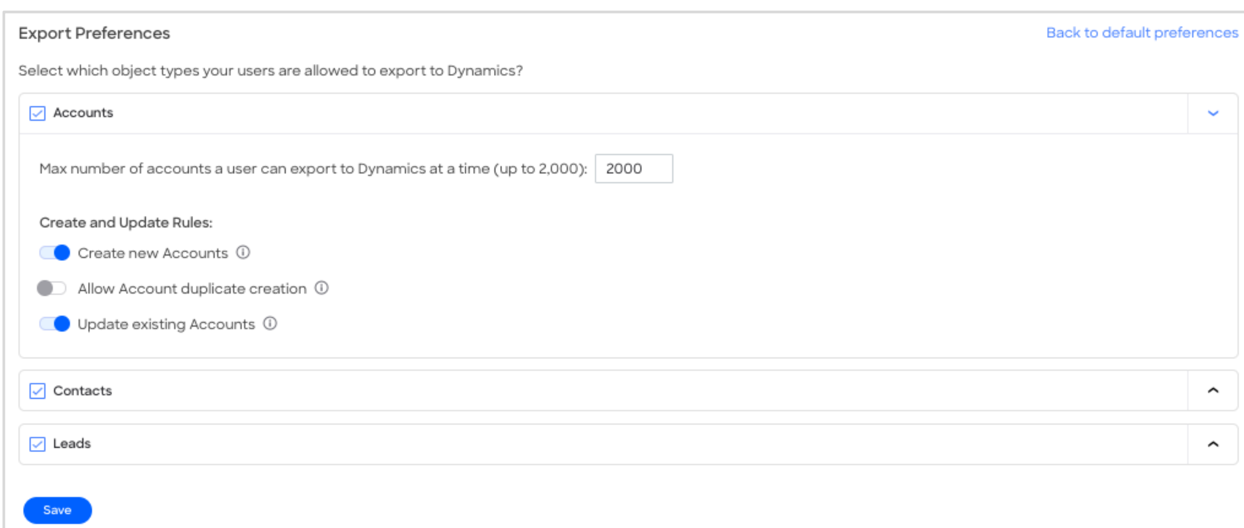


From this page, click **Edit settings** to begin configuring your integration.

Export Preferences

ZoomInfo admins can configure export preferences and limit the objects that can be exported:

1. Click the **Export** tab.
2. Select each object type you want your users to be able to export to Dynamics.



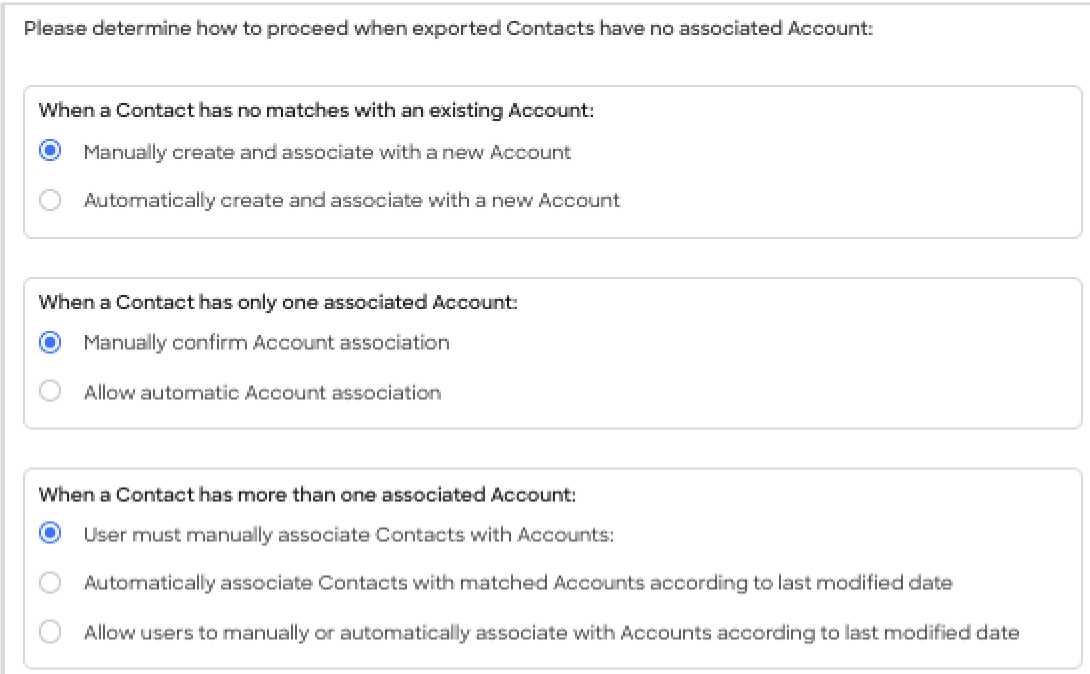
3. For each object type, set a maximum number of records a user can export to Dynamics at one time (up to 2,000).

   Note: For the Contacts object, ensure that you review the export considerations below for details on the impact and expected behavior of account association settings.

4. Click **Save** to apply the changes for all users in your organization's ZoomInfo instance.

Export Considerations

For the Contacts object, you have a few options in how account association logic is applied when your organization's users export ZoomInfo contacts to Dynamics.

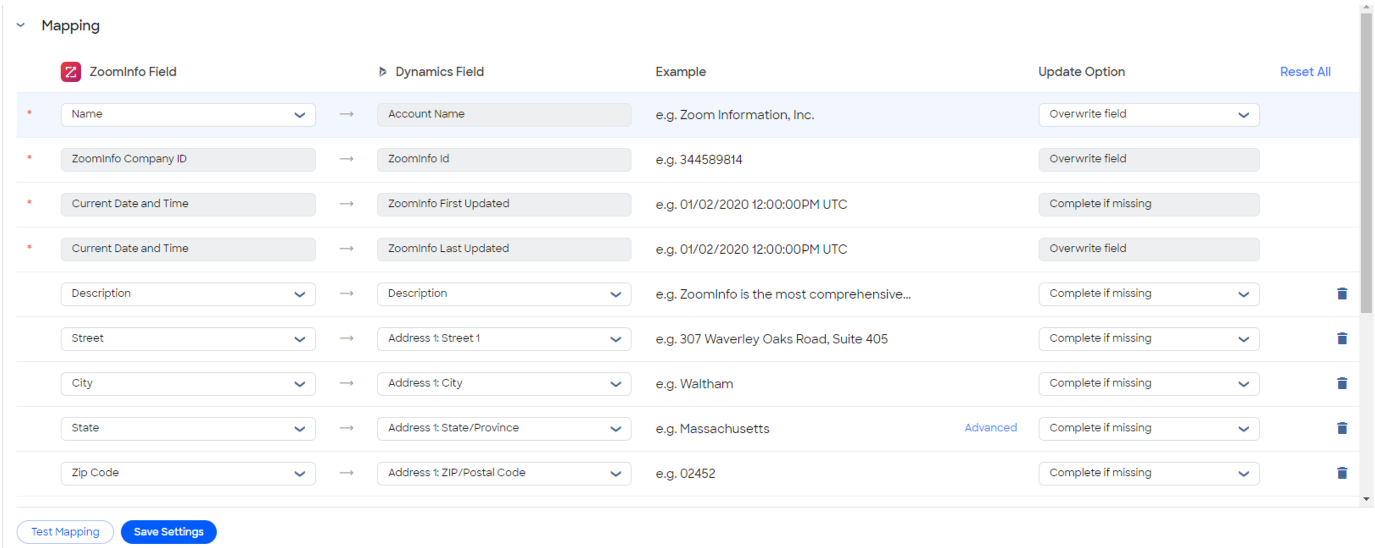


ZoomInfo recommends that you set account association options to "manual" (which is the default for all three options), and let the user determine the account association when exporting contacts. Using these options:

- If an account does not exist, the user is asked to confirm the creation of the account. If confirmed, ZoomInfo will assign the contact to the newly created account.
- If only one account exists, the user is asked to confirm that they want to associate the contact with that account.
- If we match on multiple accounts, the user is asked to choose the account with which they want to associate the contact.

Custom Mapping

Click the **Mapping** tab.



On the **Mapping** tab, use the **Accounts** and **Contacts**, and **Leads** tabs to review the default mappings for each object type and make any mapping changes.

Field	Description
ZoomInfo Field	Available ZoomInfo fields. Required fields are marked with an asterisk (*).
Dynamics Field	Available Dynamics fields. These fields are retrieved directly from your Dynamics instance.
Update Options	Select an option: • **Complete if missing** (default) - Only complete with ZoomInfo data if none exists in Dynamics. • **Overwrite field** - Overwrite existing data in Dynamics 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.

Important: If you are mapping to a picklist field (dropdown select) in Dynamics, you will want to take into account the internal values for each option.

Set a Hierarchy for ZoomInfo Data Within a Single Dynamics Field

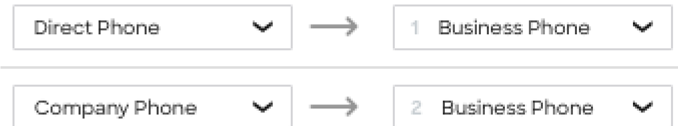
In some cases, you may want multiple ZoomInfo fields to be stacked hierarchically within a single Dynamics field.

For example, you may want to import both the ZoomInfo Direct Phone and Company Phone fields into the Dynamics Business Phone field.

1. Map **Direct Phone** to **Business Phone**.

2. Map **Company Phone** to **Business Phone**.

The first occurrence of the **Business Phone** field is denoted with number 1, and the second with number 2.



Field hierarchy allows for both first and second choice values for selected Dynamics fields. For exported records where more than one data point is available from ZoomInfo (such as phone numbers) you can prioritize the data by preference within your mapping.

Test and Save

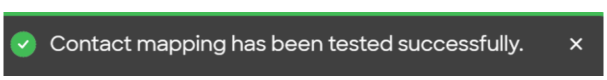
Before saving your mapping changes, click **Test Mapping** to export and delete a test record using your current settings.

- 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.

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

- If the test is successful, a notification displays.

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

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

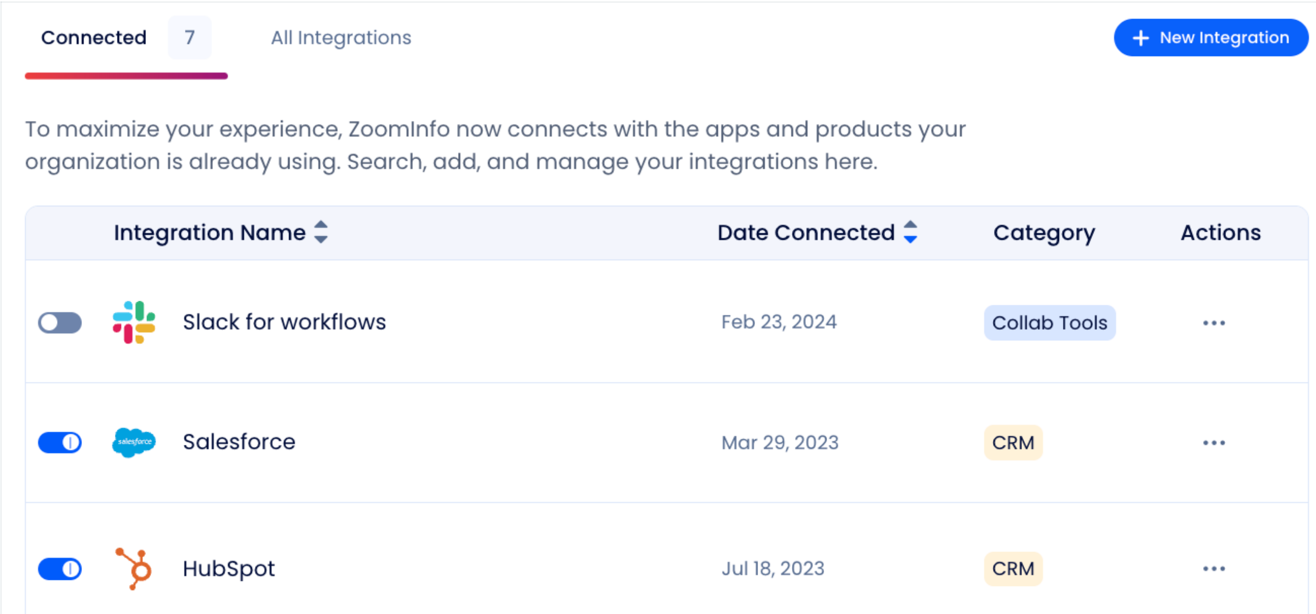
  Remove any unfilled rows and click **Save Changes** again.

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

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.



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.

Duplicate Checking

When a user exports records from ZoomInfo to Dynamics, duplicate checking logic is applied to avoid creating duplicate records within Dynamics.

Admin Control of Duplication Settings

A ZoomInfo admin can control the user's available options for handling duplicates by configuring the default duplication settings for the integration in the Admin Portal. When a duplicate is encountered during export, users can choose the default behavior set by the admin or select other available options.

User Options During Export

During an export, duplicates are flagged and presented to the user. Depending on available options set by an admin, the user can choose to update an existing record, create a duplicate record, or not export the record.

Duplicate Logic

ZoomInfo checks for specific criteria, in a specific order, to determine if existing data in Dynamics matches data being exported.

For companies: Companies in ZoomInfo are equivalent to accounts in Dynamics. When exporting companies to Dynamics, ZoomInfo will check for duplicate Dynamics accounts using criteria applied in the following logical order:

1. ZoomInfo ID
2. Exact Company Name
3. Exact Company Website

For people: People in ZoomInfo are designated as contacts, and can be exported as Dynamics contacts or leads.

When exporting contacts to Dynamics, ZoomInfo will check for duplicate Dynamics contacts or leads using criteria applied in the following order:

Contacts (people associated with a company)

1. ZoomInfo ID
2. Email Address
3. Exact First Name + Exact Last Name + Exact Company Name

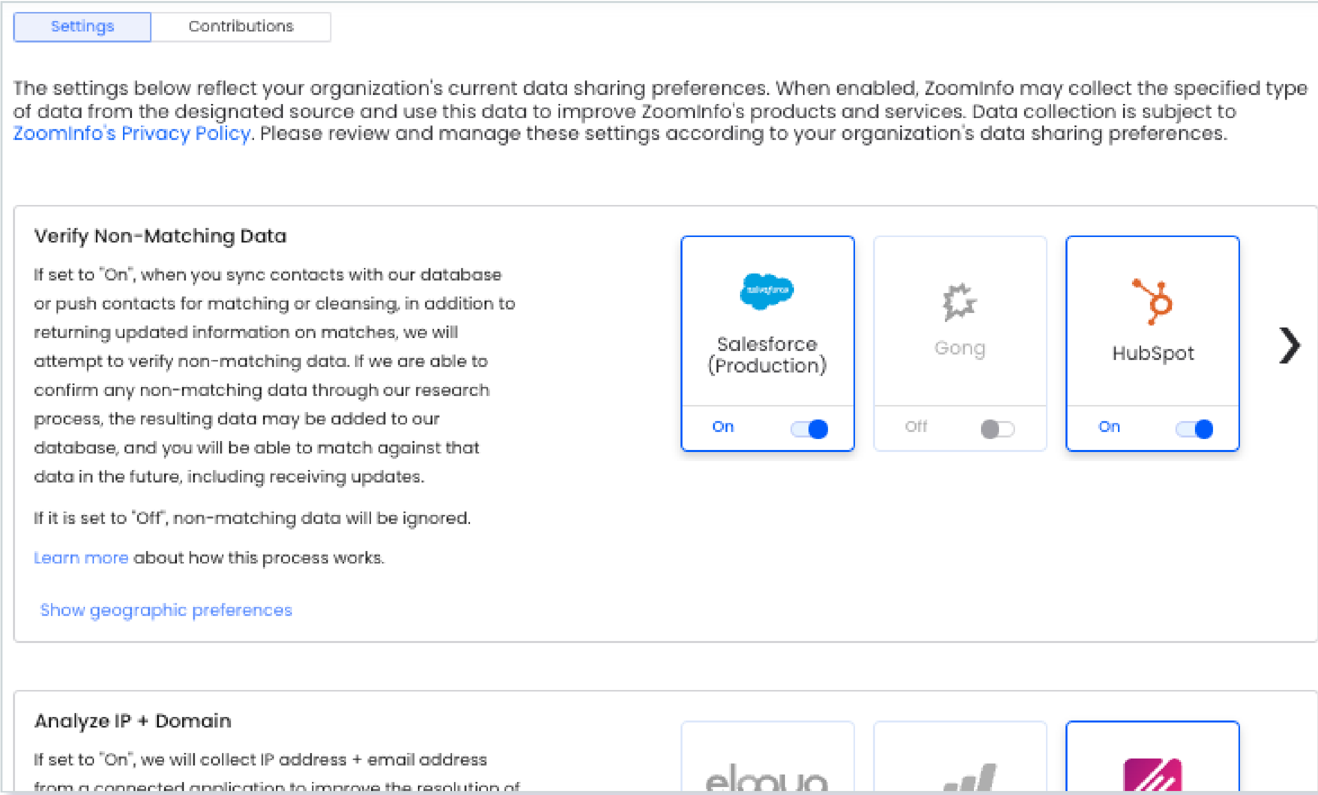
Leads (people not associated with a company)

1. ZoomInfo ID
2. Email Address
3. Exact First Name + Exact Last Name + Exact Company Name

Note: If a person in Dynamics exists as both a contact and a lead, ZoomInfo will present the contact record as the duplicate.

Data Sharing

The Data Sharing page in the Admin Portal is enabled if your organization has not contractually opted out of data sharing with ZoomInfo that is intended to analyze your use of connected integrations. Data sharing helps to improve the ZoomInfo service and make recommendations to you.



1. Go to **Admin Portal > Data Sharing**.

   - If your organization has chosen to opt-out of data sharing, the following message displays:

     As a precaution, this function is set to OFF and is not editable, in order to prevent unintended changes that may be in conflict with your organization's contractual terms.

   - If your organization has not opted out of data sharing, the **Data Sharing** page displays with the ON/OFF toggles enabled.

2. Data collection is subject to ZoomInfo's Privacy Policy. Review the policy details using the link provided.

3. Review and manage the data sharing settings according to your organization's data sharing preferences.

4. Over time, you can review the **Contributions** tab to monitor the contributions made by your organization.

Connect Users

Once the ZoomInfo admin has enabled the integration for all users by clicking the toggle to the left of the integration in the Admin Portal, individual ZoomInfo users can connect to Dynamics.

Admins should share the following link with users for instructions on [how to connect to Microsoft Dynamics](#).

Note: Once a user is connected and begins exporting to Dynamics, that user will be assigned as contact owner for any contacts exported from ZoomInfo to Dynamics.