Microsoft Teams Integration Guide

For administrators setting up the Microsoft Teams integration

This guide explains how to install and configure the ZoomInfo integration with Microsoft Teams to enable users to receive alerts about target accounts directly in Microsoft Teams.

Prerequisites

- Active ZoomInfo administrator account

- Microsoft Teams application administrator license

- Microsoft Teams installed and configured

Teams Admin: Make ZoomInfo App Available to Users

A Microsoft Teams admin must first ensure that the ZoomInfo app is available to users with a ZoomInfo Sales license.

Access the Microsoft Teams Admin Center

1. Log in to the **Microsoft Teams Admin Center**.

2. Navigate to **Teams Apps > Manage Apps**.

Locate the ZoomInfo App

1. Use the search function to find "ZoomInfo".

2. Select the "ZoomInfo" app from the results.

Set Up ZoomInfo App Permissions for Your Organization

To support breaking alerts in Microsoft Teams, set the required Admin consent permissions (scopes) for the ZoomInfo app:

ChannelMessage.Read.All	offline_access
ChannelMessage.Read.All	Team.ReadBasic.All
Directory.Read.All	Team.ReadBasic.All
Directory.Read.All	TeamMember.Read.All
Group.Read.All	TeamMember.Read.All
Group.Read.All	User.Read.All
GroupMember.Read.All	User.Read.All
GroupMember.Read.All	

Configure User Access

Ensure that ZoomInfo admins and Sales users have access to the app.

1. Go to the **Users and groups** tab.

2. Click **Edit Availability**.

3. Select access level (Recommended: "Specific users and groups").

4. Apply your settings.

> **Best Practices**
>
> Grant access only to users who actively use ZoomInfo
>
> Review access permissions periodically
>
> Ensure all users meet necessary compliance requirements

ZoomInfo Admin: Connect the Integration and Configure Alerts

With the Teams app now available to users, a ZoomInfo admin can connect the Microsoft Teams integration in the ZoomInfo Admin Portal and configure GTM alerts.

Access Integration Settings

1. Log in to the ZoomInfo Admin Portal.

2. Navigate to **Admin Portal > Integrations**.

Connect the Microsoft Teams Integration

1. Locate "Microsoft Teams" using the search function on the **All Integrations** page.

2. Click the **Connect** button.

3. Sign in with your Microsoft admin credentials.

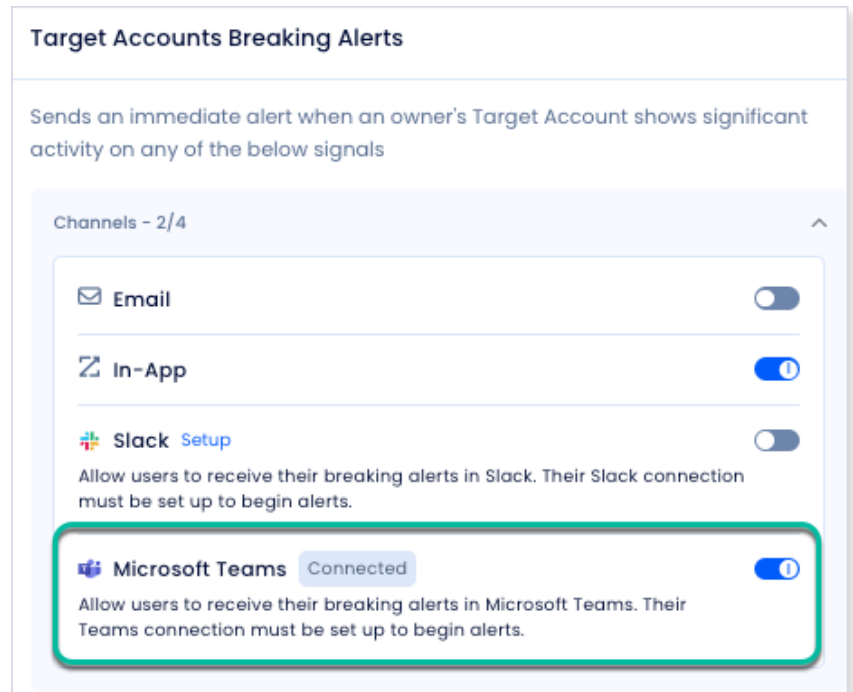## Authorize the Integration

1. Review the requested permissions.

2. Select **Consent on behalf of your organization**.

   Once completed, the ZoomInfo application will be available in your Microsoft Teams environment.

Configure Breaking Alerts

1. Access the Admin Portal.

2. Locate the **Go-To-Market Alerts** section.

3. Configure alert preferences and set the toggle to ON.

Users that add the ZoomInfo app to Teams will receive alerts about target accounts directly in Teams.

Target Accounts Breaking Alerts

Sends an immediate alert when an owner's Target Account shows significant activity on any of the below signals

Channels - 2/4

☑ Email

Z In-App

✦ Slack Setup
Allow users to receive their breaking alerts in Slack. Their Slack connection must be set up to begin alerts.

◉ Microsoft Teams Connected
Allow users to receive their breaking alerts in Microsoft Teams. Their Teams connection must be set up to begin alerts.

User Experience: Add the App to Teams

Teams users can add the ZoomInfo app to their Teams environment.

1. Launch Microsoft Teams.

2. Sign in with your Microsoft credentials.

3. Navigate to **Apps** in the left sidebar.

4. Search for "ZoomInfo" and click **Add**.

   Note: If you see **Request** instead of **Add**, this means that your admin has not made the app available to users in Teams, as described in Teams Admin: Make ZoomInfo App Available to Users. You can click **Request** to alert your admin to perform the configuration described earlier in this document.

5. After adding the app, you'll see a welcome message.

6. Click **Get Started** to be directed to ZoomInfo Sales. You'll now receive alerts about target accounts directly in Microsoft Teams.