

Outreach Integration Guide

For administrators setting up the ZoomInfo integration with Outreach

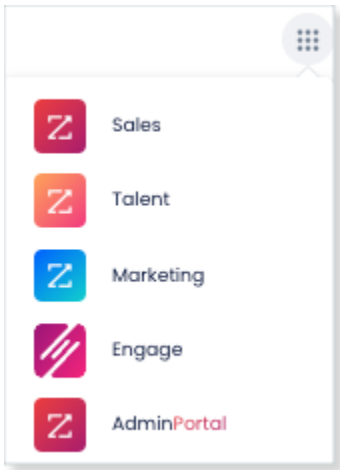
Get Connected	2
Configure Integration Settings	3
Export Preferences	3
Custom Mapping	4
View and Manage Connected Integrations	7
Duplicate Checking	7
Admin Control of Duplication Settings	7
User Options During Export	8
Duplicate Logic	8
Data Sharing	8
Connect Users	9

Get Connected

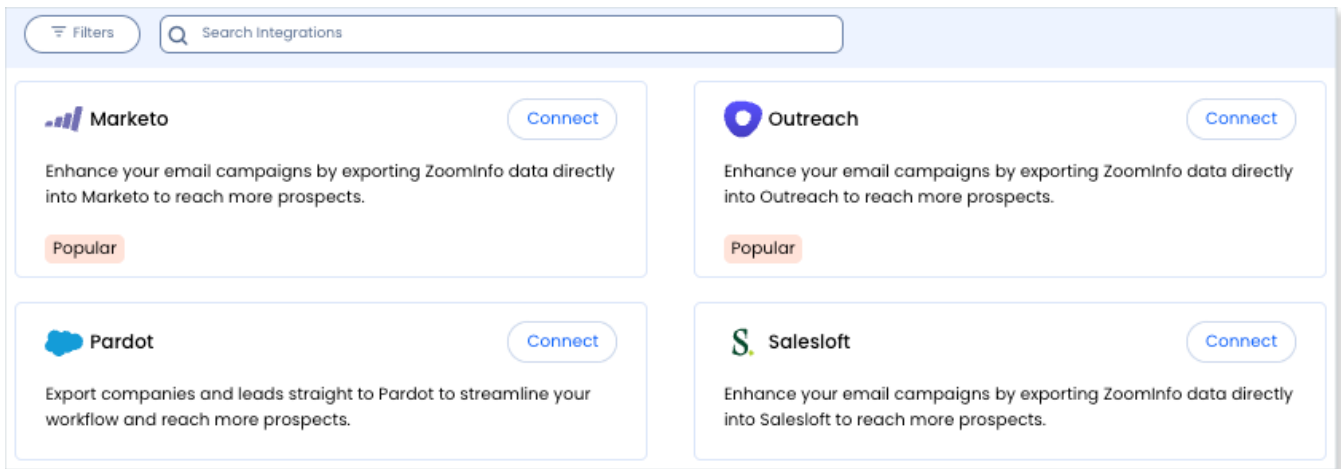
ZoomInfo admins enable the Outreach integration for users and control user preferences including export settings, custom mappings, and data sharing settings. ZoomInfo users can then connect to Outreach using their credentials.

A ZoomInfo admin establishes the integration with Outreach that enables ZoomInfo users to connect and export data to Outreach.

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



2. Click **Integrations**.



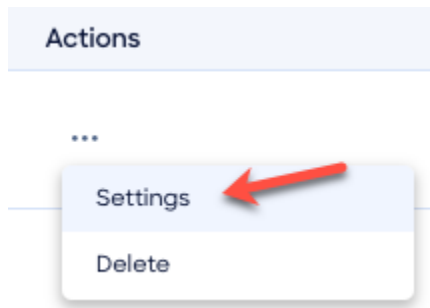
3. Use the **Filters**, or **Search integrations** options to find your integration.
4. On the tile for your integration, click **Connect**.
5. Complete the connection using your credentials.

Configure Integration Settings

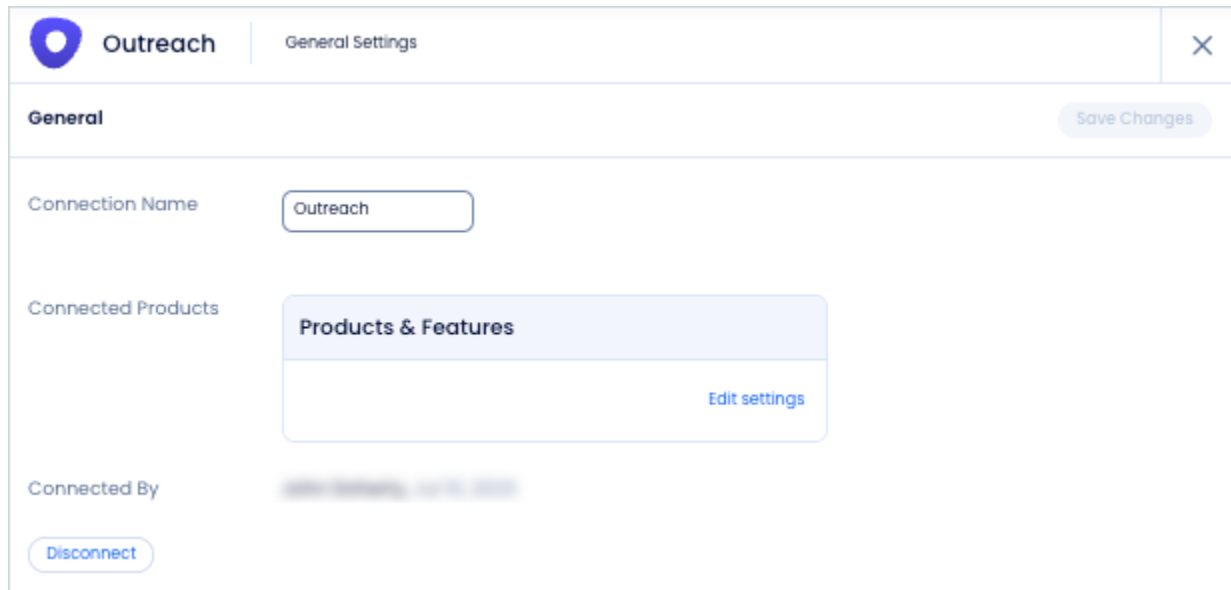
Once your integration is connected, you can configure the settings, including export preferences and mapping:

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.

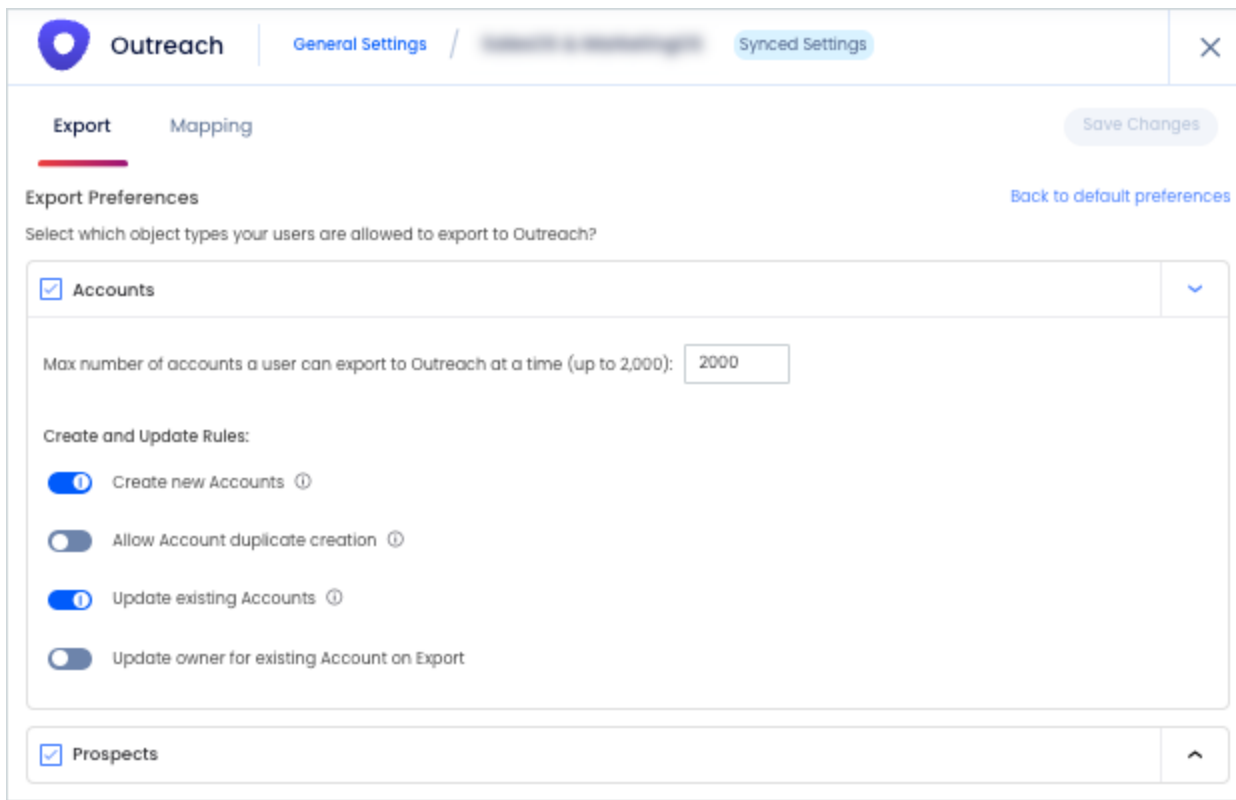


From this page, click **Edit settings** to begin configuring your integration.

Export Preferences

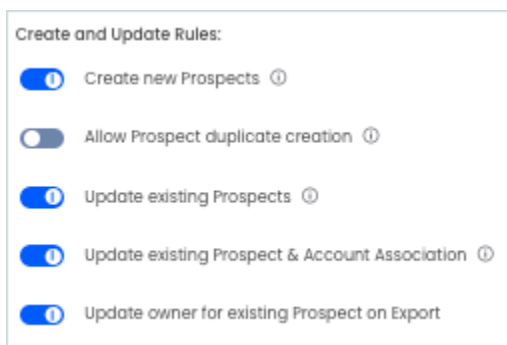
ZoomInfo admins can configure export preferences and limit the objects that can be exported:

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



Note: You can adjust the maximum number of records a user can export for each object type.

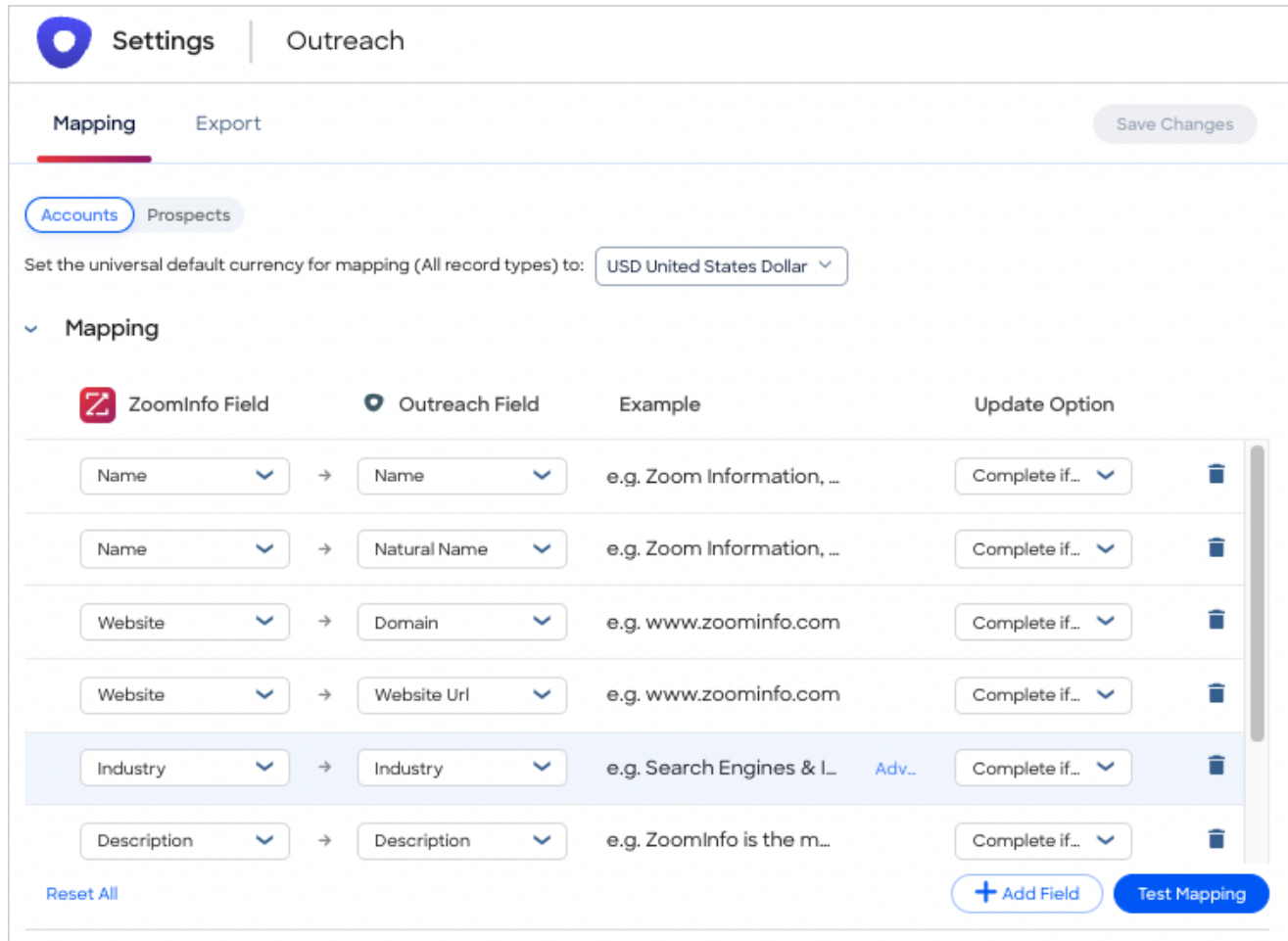
3. For the **Prospects** object, you can specify the **Create and Update Rules** to present your users with specific options when exporting to Outreach.



4. Click **Save Changes** to apply the changes for all users in your organization's ZoomInfo instance. Users will be able to export records directly, or into Outreach Sequences.

Custom Mapping

Click the **Mapping** tab.




On the **Mapping** tab, use the **Accounts** and **Prospects** 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 (*).
Outreach Field	Available Outreach fields. These fields are retrieved directly from your Outreach 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 Outreach.• Overwrite field - Overwrite existing data in Outreach 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.

Set a Hierarchy for ZoomInfo Data Within a Single Outreach Field

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

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

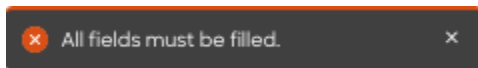


Test and Save

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

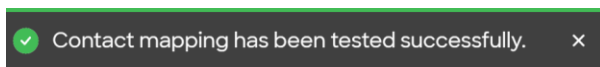


- If the test record cannot be created, this is typically due to an error in the mapping settings. For example, mappings cannot be saved with a blank field.



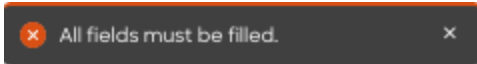
Adjust the settings and click **Test Mapping** again.

- 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.

Connected 7 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 type="checkbox"/> Slack for workflows	Feb 23, 2024	Collab Tools	...
<input checked="" type="checkbox"/> Salesforce	Mar 29, 2023	CRM	...
<input checked="" type="checkbox"/> HubSpot	Jul 18, 2023	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.

Duplicate Checking

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

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 Outreach matches data being exported.

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

1. Domain
2. Exact Company Name

For people: People in ZoomInfo are designated as contacts, and can be exported as Outreach prospects.

1. If an account exists, ZoomInfo will check for duplicate contacts
2. If no account exists, ZoomInfo will create an account and associate the contact

When exporting contacts to Outreach, ZoomInfo will check for duplicate Outreach prospects using criteria applied in the following order:

1. Email Address
2. First Name + Last Name + Exact Company Name

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.

Settings
Contributions

The settings below reflect your organization's current data sharing preferences. When enabled, ZoomInfo may collect the specified type of data from the designated source and use this data to improve ZoomInfo's products and services. Data collection is subject to [ZoomInfo's Privacy Policy](#). Please review and manage these settings according to your organization's data sharing preferences.

Verify Non-Matching Data

If set to "On", when you sync contacts with our database or push contacts for matching or cleansing, in addition to returning updated information on matches, we will attempt to verify non-matching data. If we are able to confirm any non-matching data through our research process, the resulting data may be added to our database, and you will be able to match against that data in the future, including receiving updates.

If it is set to "Off", non-matching data will be ignored.

[Learn more](#) about how this process works.

[Show geographic preferences](#)

Salesforce
(Production)

On

Gong

Off

HubSpot

On

>

Analyze IP + Domain

If set to "On", we will collect IP address + email address from a connected application to improve the resolution of

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 Outreach.

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

