Pipedrive Integration Guide

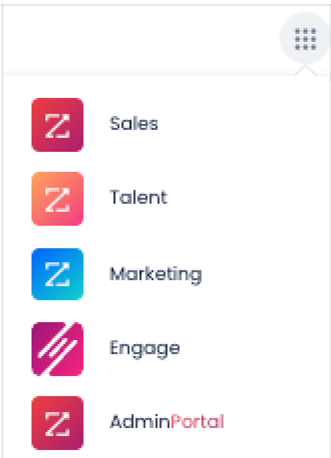
For administrators setting up the ZoomInfo integration with Pipedrive

Get Connected

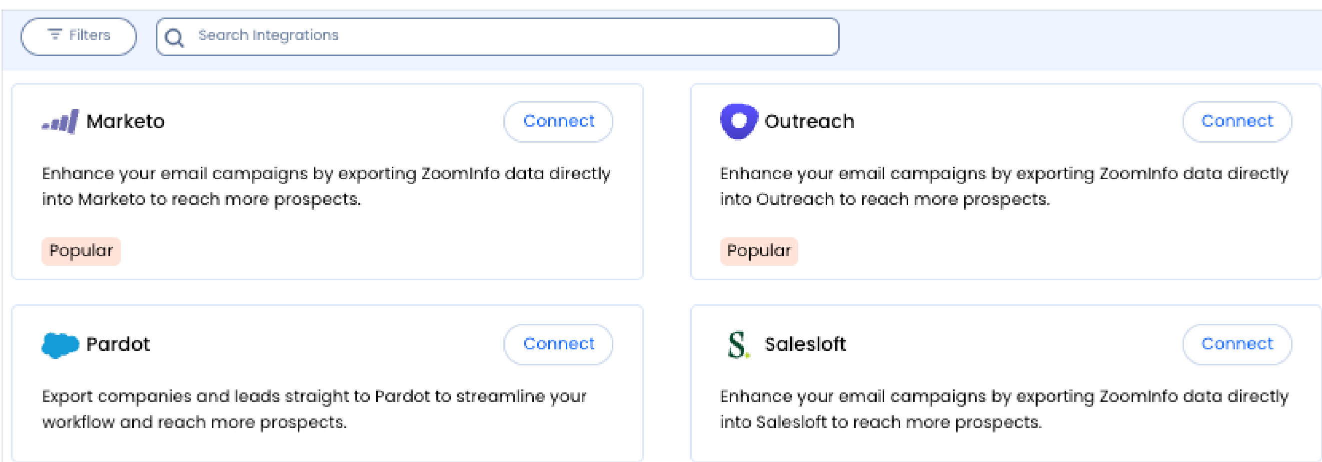
ZoomInfo admins enable the Pipedrive integration for users and control user preferences including export settings, custom mappings, and data sharing settings. ZoomInfo users can then connect to Pipedrive using their credentials.

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

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



2. Click **Integrations**.



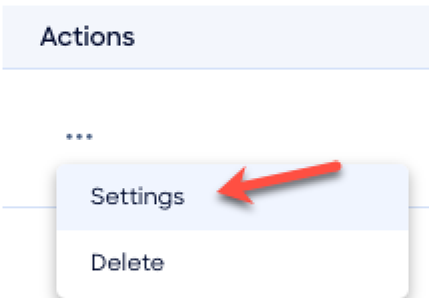
3. Use the **Filters**, or **Search integrations** options to find your integration.
4. On the tile for your integration, click **Connect**.
5. Complete the connection using your credentials.

Configure Integration Settings

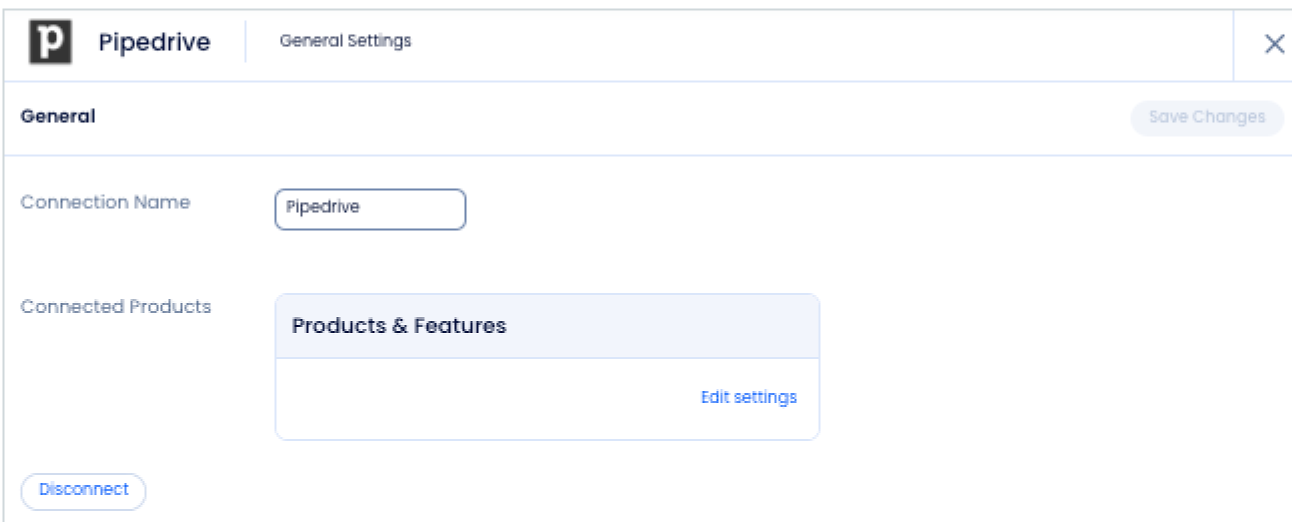
Once your integration is connected, you can configure the settings, including export preferences and mapping:

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.

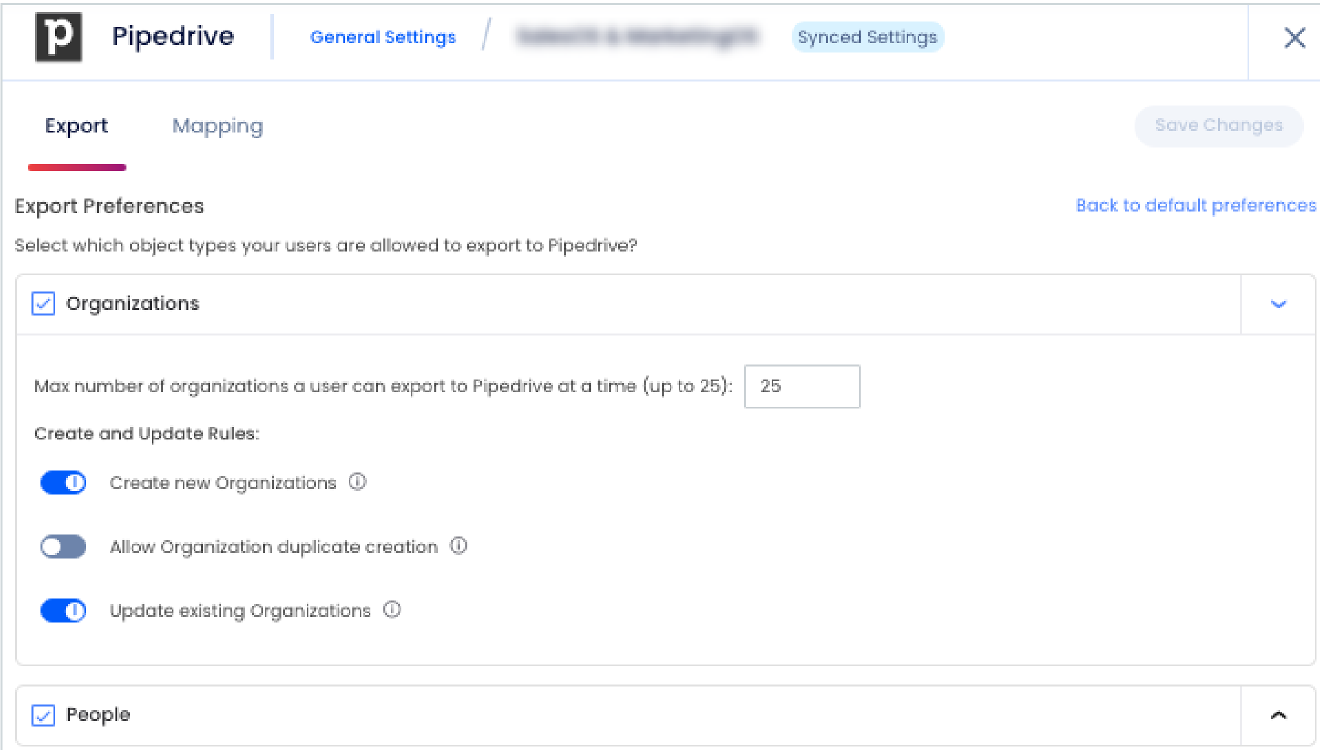


From this page, click **Edit settings** to begin configuring your integration.

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 Pipedrive.

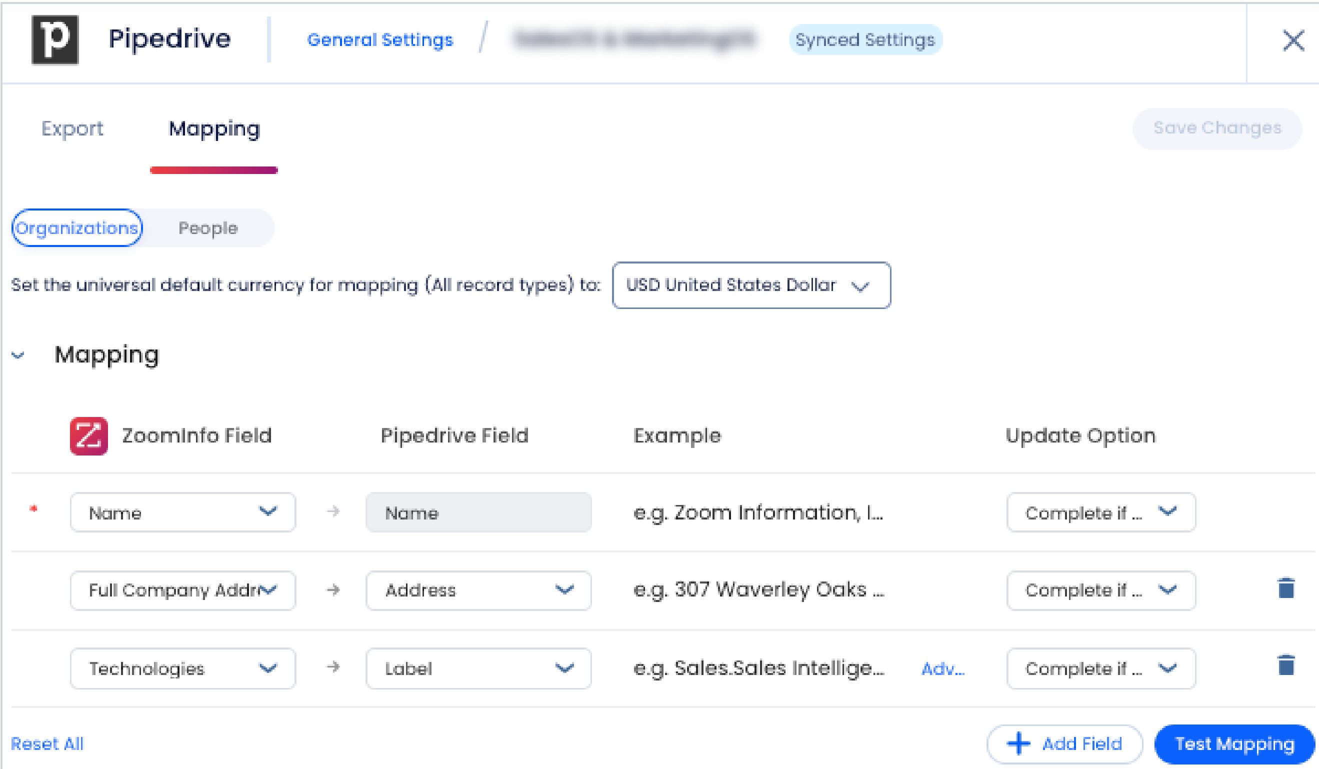


Note: You can adjust the maximum number of records a user can export for each object type.

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

Custom Mapping

Click the **Mapping** tab.



On the **Mapping** tab, use the **Organizations** and **People** 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 (*).
Pipedrive Field	Available Pipedrive fields. These fields are retrieved directly from your Pipedrive instance.
Update Options	Select an option: • **Complete if missing** (default) - Only complete with ZoomInfo data if none exists in Pipedrive. • **Overwrite field** - Overwrite existing data in Pipedrive 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 Pipedrive Field

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

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

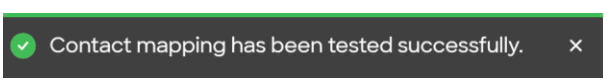
Before saving your mapping changes, click **Test Mapping** to export and delete a test record using your current settings.

- 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.

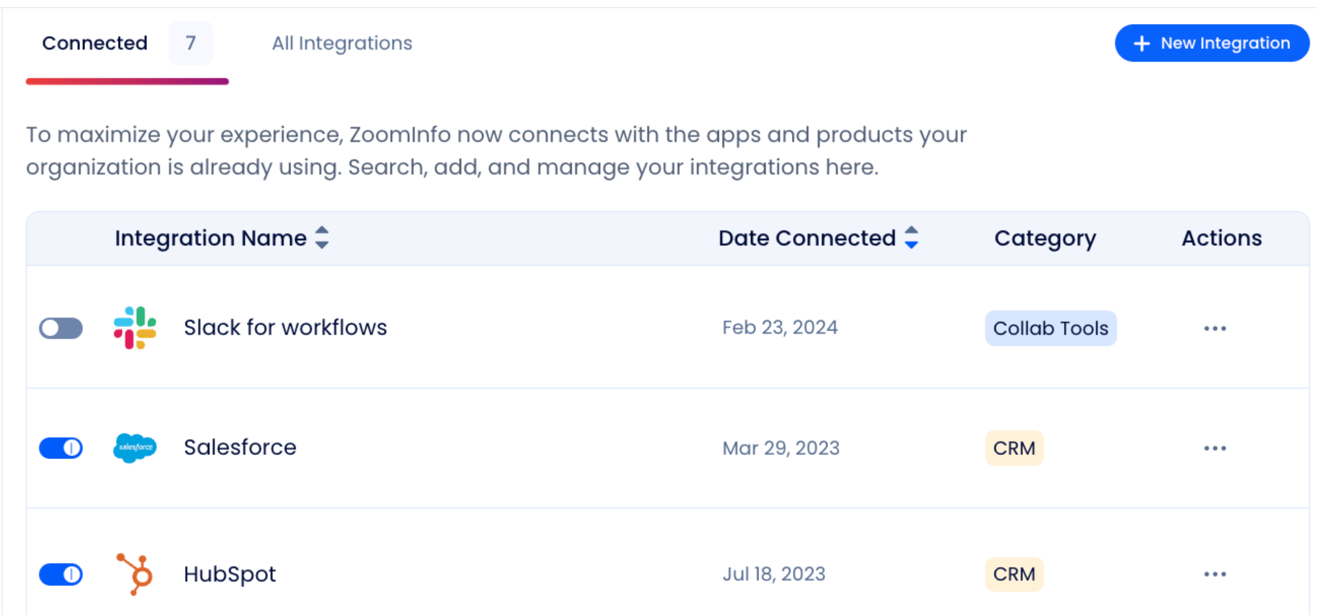
  Remove any unfilled rows and click **Save Changes** again.

- 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.



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 Pipedrive, duplicate checking logic is applied to avoid creating duplicate records within Pipedrive.

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 Pipedrive matches data being exported.

For companies: Companies in ZoomInfo are equivalent to organizations in Pipedrive. When exporting companies to Pipedrive, ZoomInfo will check for duplicate Pipedrive organizations based on the exact company name.

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

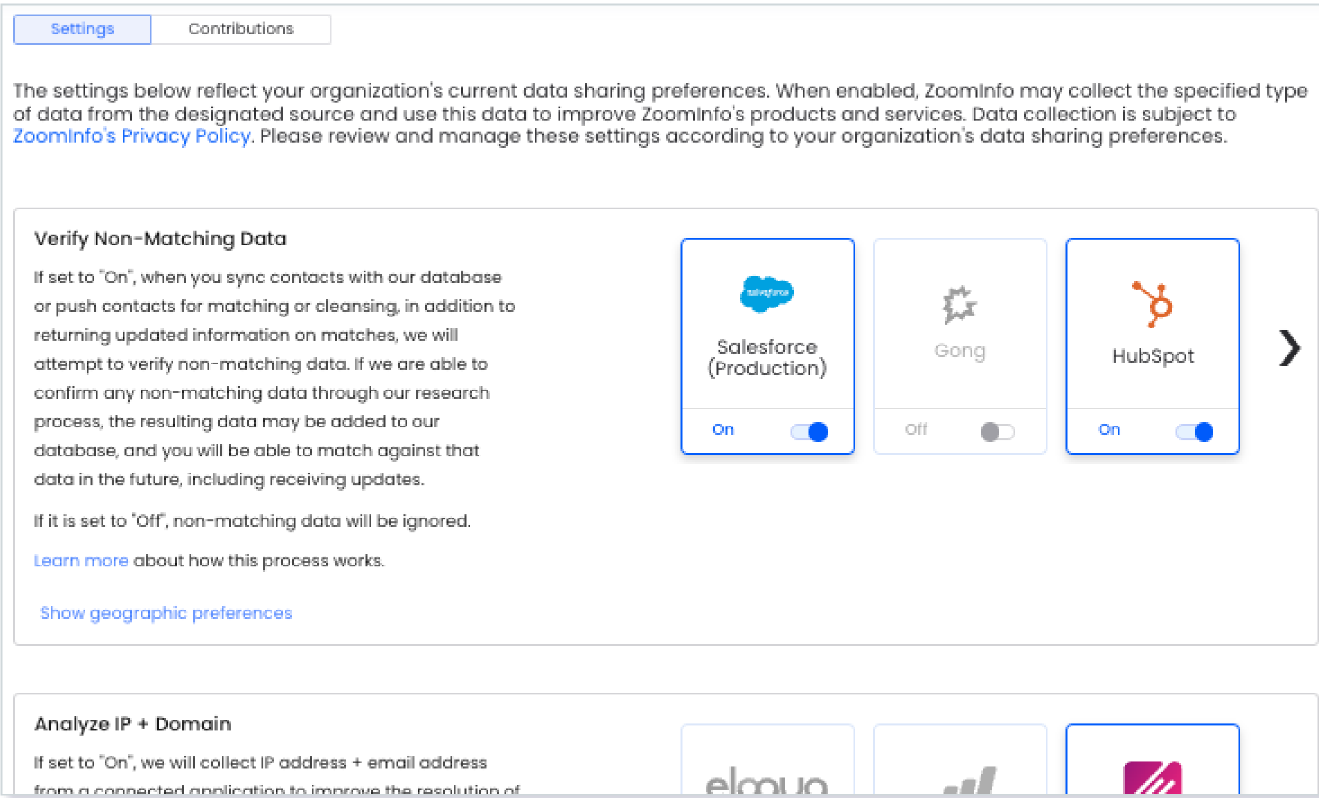
1. If an account exists, ZoomInfo will check for duplicate contacts
2. If no account exists, ZoomInfo will create an account and associate the contact

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

1. First Name + Last Name + Email Address + Org ID
2. First Name + Last Name + Email Address
3. Email Address
4. First Name + Last Name + Phone + Org ID
5. First Name + Last Name + Short Company Name (first 5 characters)

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 Pipedrive.

Admins should share the following link with users for instructions on how to connect ZoomInfo to Pipedrive.