zoominfo Sales

2024 ZoomInfo Sales Release Notes

These release notes describe new features and improvements for 2024 ZoomInfo Sales releases

Previous Releases

Current Release

[Jul 16, 2024]

Our SaaS user experience continuously evolves. Over time, descriptions of new features and enhancements in these release notes may no longer accurately reflect the current user experience. Visit the [ZoomInfo Knowledge Center] for public content that supports the current functionality.

Jul 16, 2024 ZoomInfo Sales Release

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Auto-Connect SugarCRM Users from the Admin Portal

Instantly connect your organization's users to SugarCRM directly from the Admin Portal using a service account, eliminating the need for users to individually connect using their own credentials.

- A service account simplifies the onboarding process as your organization evolves and changes, and eliminates the need for your Support team to troubleshoot individual SugarCRM connection issues for your users.
- The service account is simply a single account through which the integration is connected for your organization's users. A ZoomInfo admin can use their own SugarCRM user account or a dedicated integration user account to connect the integration.
- Prior to this update, each ZoomInfo user in your org was required to connect to SugarCRM using their own credentials in order to export records from ZoomInfo.

How It Works (for New Connections): The service account option is the default configuration when setting up the configuration. Admins can choose to automatically connect all their users to SugarCRM or to have their users manually connect with their own usernames and passwords.

For details on setting up the SugarCRM integration for the first time (including this capability), refer to the [SugarCRM Integration Guide](#).

How It Works (for Existing Customers): Admins can refer to *Switching from User Account Option to Service Account Option* in the [SugarCRM Integration Guide](#) for instructions.

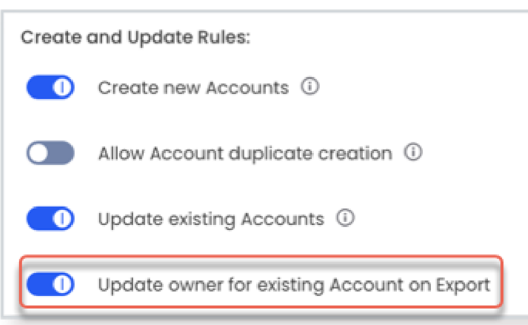
How It Works (for Users): If your org is connected to SugarCRM **using the Service Account option**, users and other admins will not see an option to disconnect themselves from the integration when they navigate to their integration settings (**initials > Settings > Integrations**).

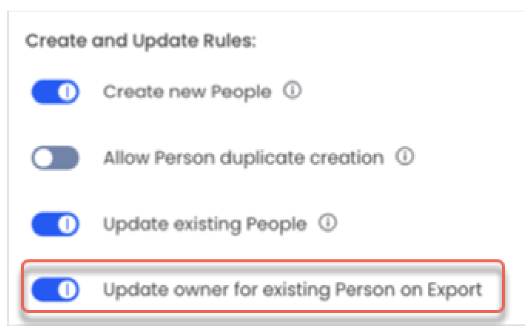
If your org connects to SugarCRM **using the User Account option** (which requires each user to connect), users will see an option to connect or disconnect themselves from the integration.

Salesloft Account Ownership Update

The **Export** tab for the Salesloft integration lets you configure your export settings for supported objects. For both the **Account** and **People** objects, you can specify **Create and Update Rules** to present your users with specific options when exporting to Salesloft. In this release, we've added the following new options to provide ZoomInfo users with an option to update ownership for an Account or Person when exporting to Salesloft:

- **Update owner for existing Account on Export**
- **Update owner for existing Person on Export**

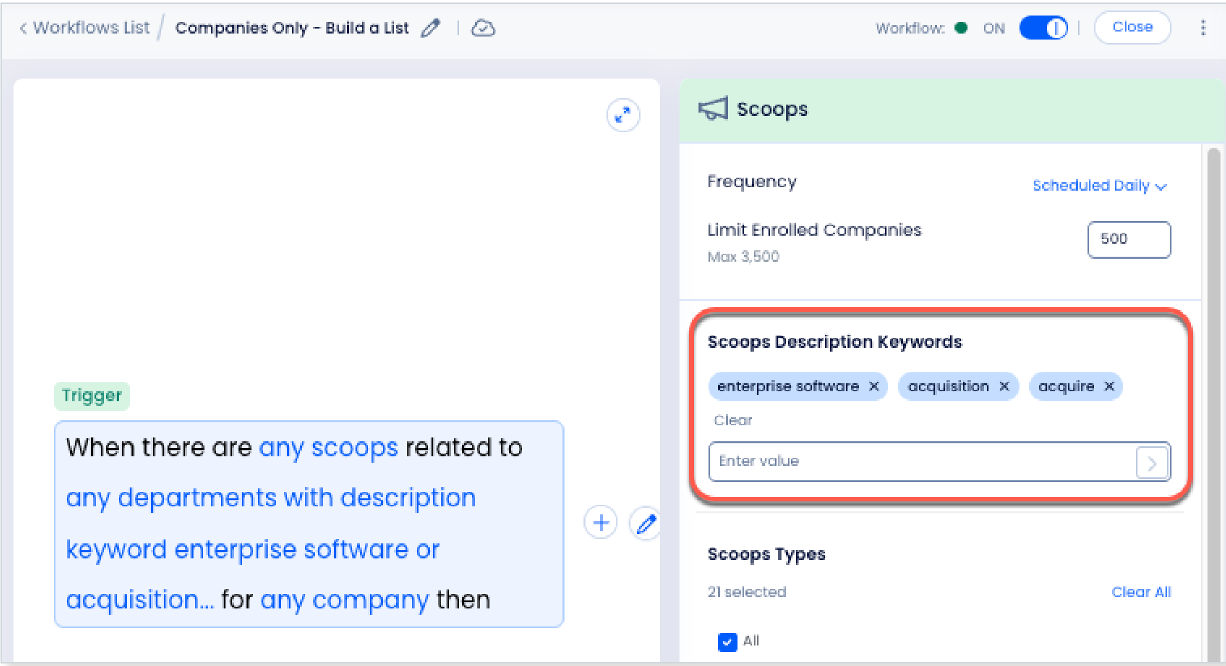




Workflows: Scoops Description Keywords Filter in the Scoops Trigger

For Workflows that use the **Scoops** trigger, we've added a **Scoops Description Keywords** filter. This addition lets you be more selective in refining your Workflow to include companies based on specific keywords.

- This feature replicates the functionality already available in Advanced Search.
- The filter behaves as an "OR" filter as you add additional keywords.



< Workflows List / Companies Only - Build a List
Workflow: ON
Close
Trigger
When there are any scoops related to any departments with description keyword enterprise software or acquisition... for any company then
Scoops
Frequency
Scheduled Daily
Limit Enrolled Companies
Max 3,500
500
Scoops Description Keywords
enterprise software
acquisition
acquire
Clear
Enter value
Scoops Types
21 selected
Clear All
All

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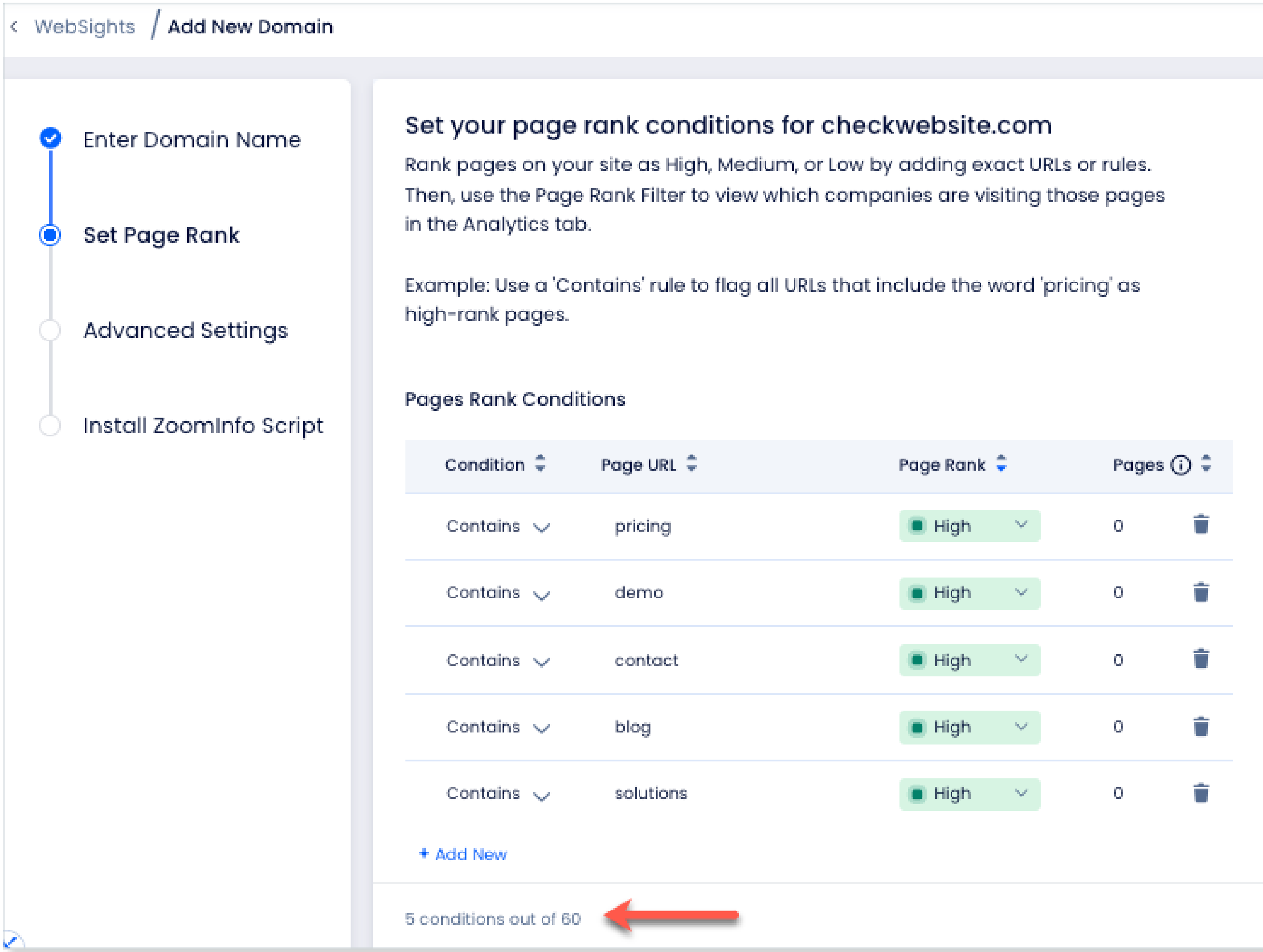
WebSights Improvements

Enhanced the Ability for Users to Rank More Pages

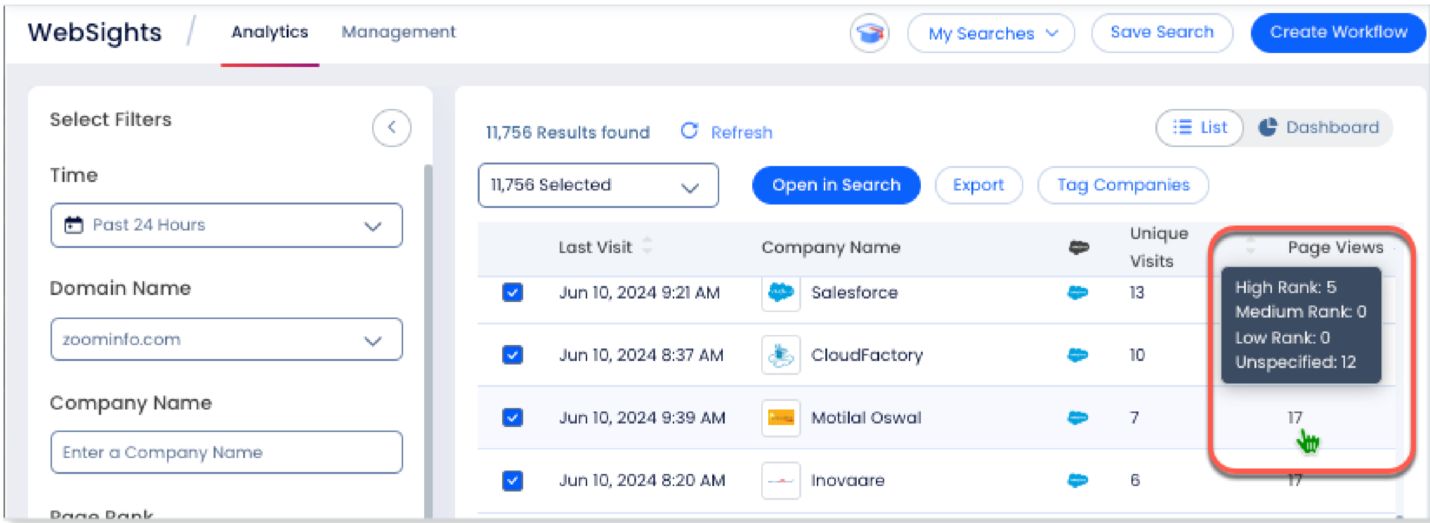
Previously, the number of pages that WebSights users could rank was limited to 30. Many mid-market and enterprise customers need more page rank configuration to manage it effectively. With this update, users can now rank up to 60 pages.



Page View Tracking Logic

Previously, all page view stats in WebSights were calculated in real-time based on the page rank setting at the given moment. With this update, we will instead track page views based on the page rank setting that was in place at the time of the visit.

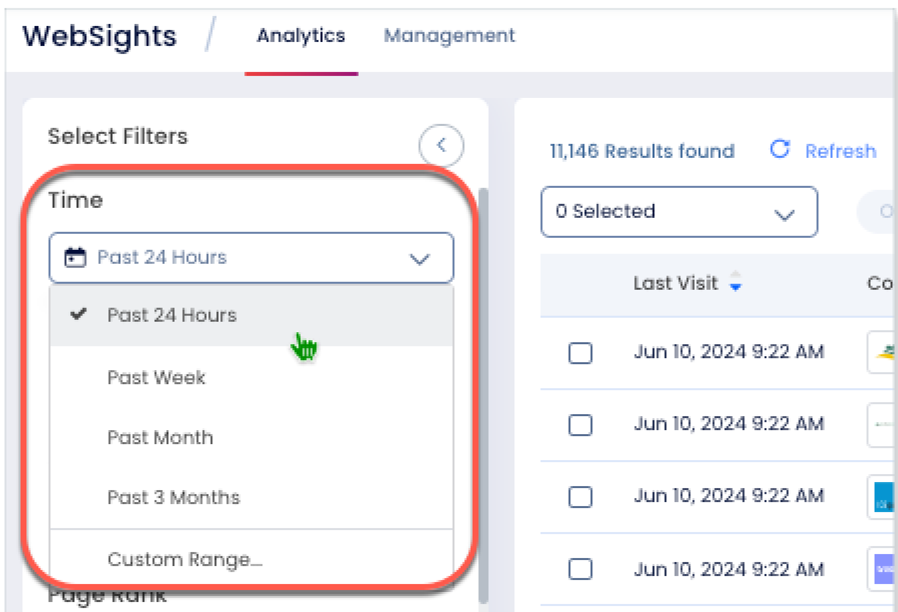
Users can see stats on **Page Views** stats when hovering over the value or by filtering by page rank.



Access Up to 6 Months of WebSights Historical Data

Previously, WebSights users could view historical WebSights data with no limit to how far back they could view the data. To improve platform efficiency and performance while still meeting typical customer needs, we've capped historical data access on the WebSights Analytics tab to 6 months.

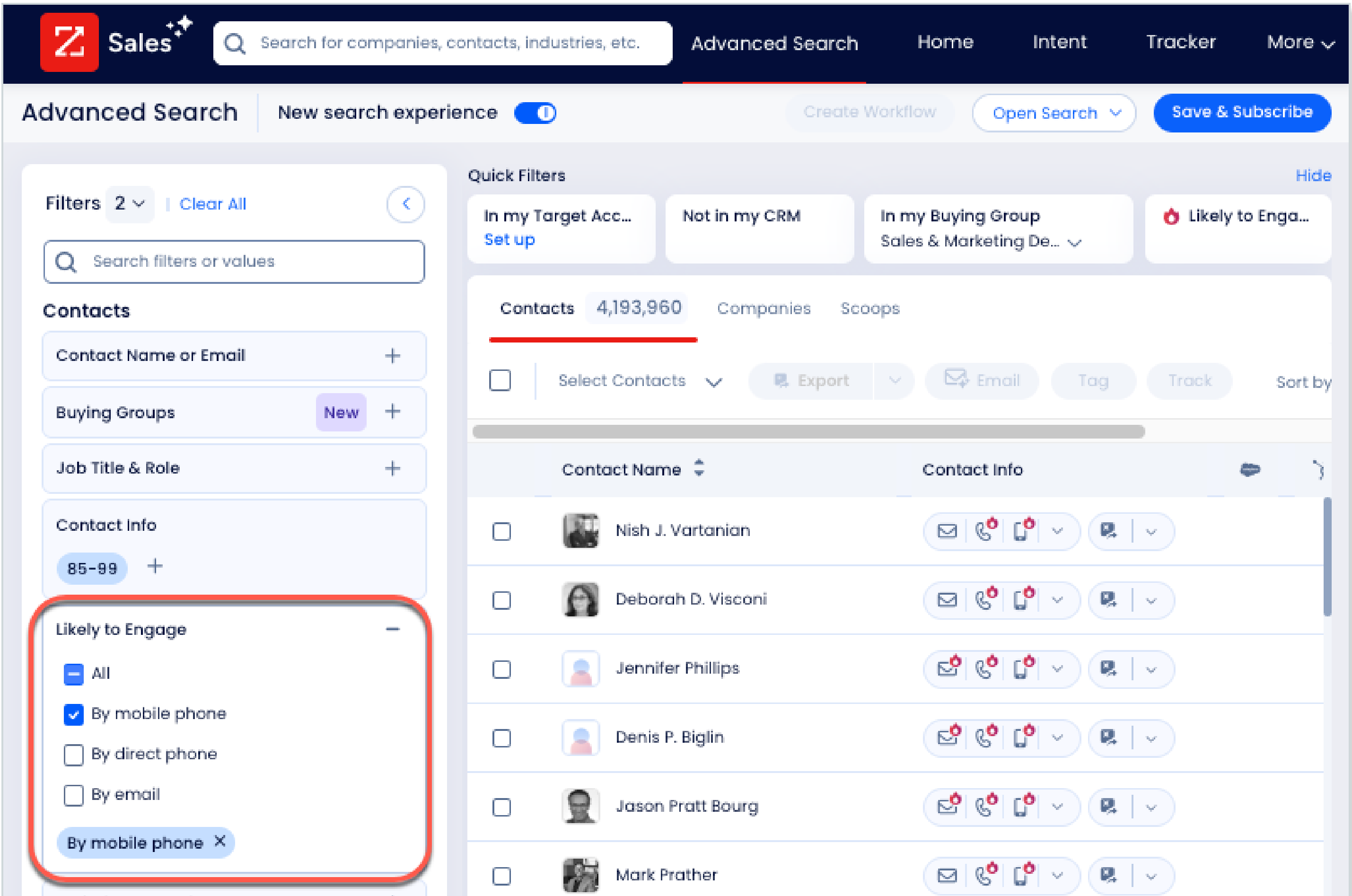
When configuring WebSights Analytics filters, users can select a predefined range (**Past 24 Hours**, **Past Week**, **Past Month**, **Past 3 Months**) or a **Custom Range** of up to 6 months from the current date.



If your organization needs access to data older than 6 months, contact Customer Support.

Likely to Engage Filter in Advanced Search

With ZoomInfo's Likely to Engage insights, you can immediately identify prospects who are at least twice as likely to engage with your outreach. Copilot users now have the ability to refine their searches with the **Likely to Engage** filters in Advanced Search, targeting the most responsive contacts more effectively. Users can filter on all outreach methods or choose **By mobile phone**, **By direct phone**, or **By email**.



Bulk Entry in Advanced Search

As a busy seller, handling large data sets efficiently can be overwhelming. Bulk entry in Advanced Search caters to those who often need to filter through extensive lists like zip codes, job titles, and industry codes. This feature update lets you easily copy and paste up to 500 values at once, simplifying your search process and saving time. Forget manual entry and tedious data handling. Our intuitive interface allows for effortless bulk value uploads into your filters.

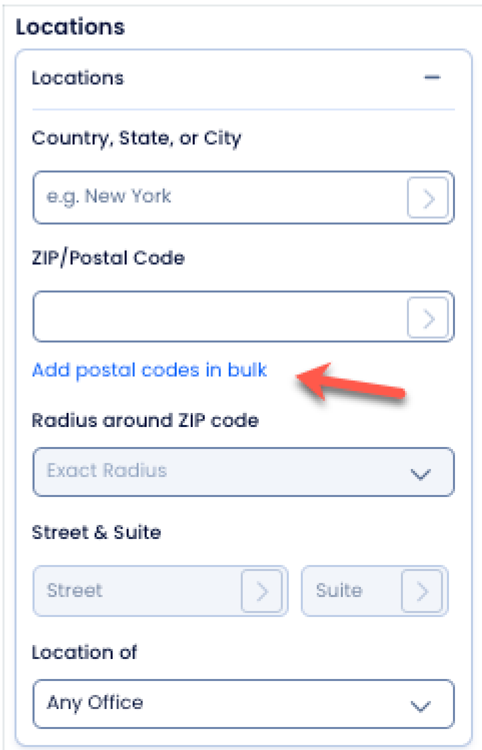
You can use bulk entry in the following Advanced Search categories:

- **Location** (Postal/Zip Codes)
- **Job Title & Role** (Job Title)
- **Industry** (Industry Classification Code)

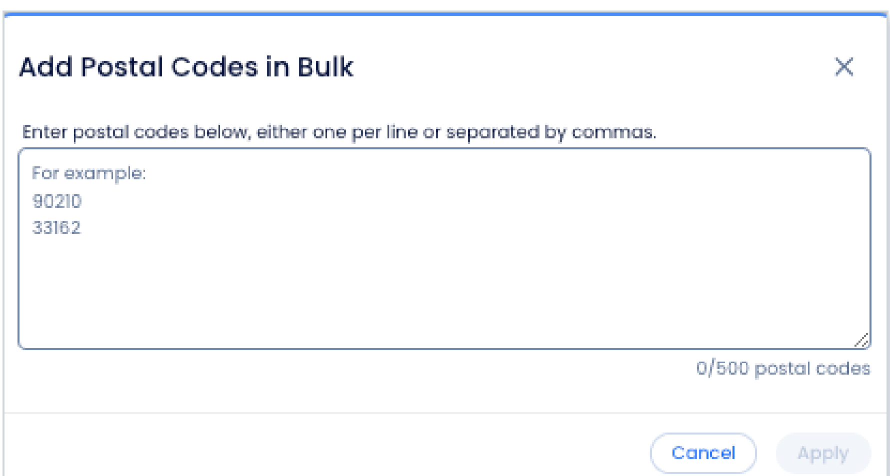
How It Works

Bulk entry works the same for the supported Advanced Search categories. Here's an example of how you'd use bulk entry with the Locations filter.

1. In **Advanced Search**, expand **Locations**.
2. Under **Zip/Postal Code**, click the **Add postal codes in bulk** link.



3. Click the link and type or copy/paste up to 500 codes to include.



4. Click **Apply**.

Intent from French and German Language Web Sources

Intent is now gathering signals from French and German language web sources, improving your ability to act on intent data for companies with a global presence.

May 21, 2024 ZoomInfo Sales Release

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Data Passport Controls

As an admin, you can establish **Data Passport Controls** to regulate user access to ZoomInfo data according to specific regions and contact data points to customize visible data. These controls enable your organization to swiftly adapt to regional compliance demands through ready-to-use solutions for common restrictions, along with customizable settings to meet all of your requirements.

Highlights include:

- Regional suppression - from continents, to countries, and states within
- Contact rules to control data points for profile, phone, and email
- Preset and customizable controls
- Ability to notify users to raise awareness and establish expectations regarding the impact of Data Passport Controls

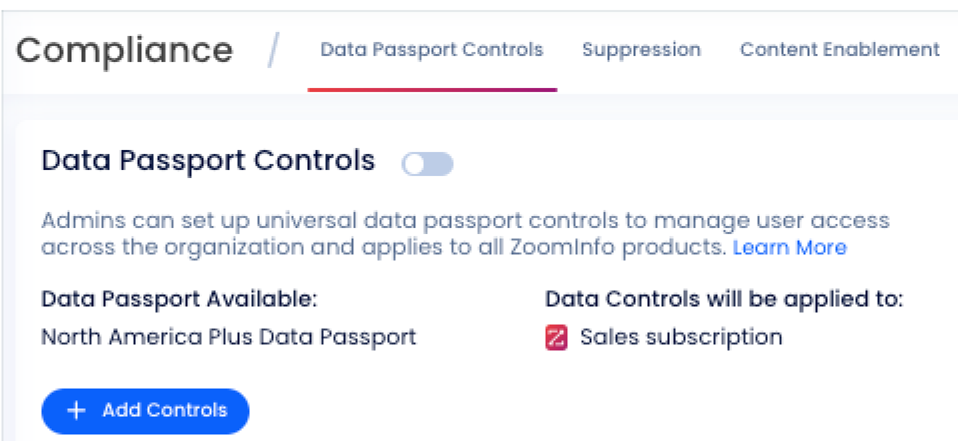
Who Gets It

Organizations with the *ZoomInfo Sales Elite+* package.

How It Works

To set up Data Passport Controls:

1. Go to **Admin Portal** > **Privacy** > **Compliance**.



2. On the **Data Passport Controls** tab, click **Add Controls** and define your Data Passport Controls for your organization. For details on configuring and enabling controls, see [How to Add a Data Passport Control](#).

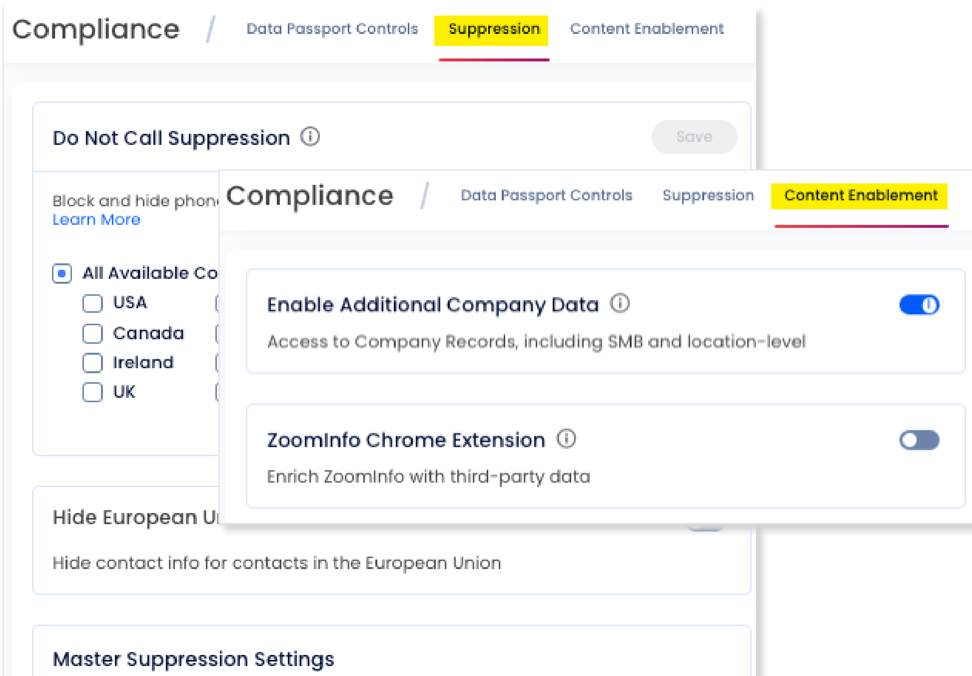
Limitations

Contacts may appear in unintended locations due to their affiliation with a company. Users should verify contact locations before exporting and initiating contact. For instance, if UK locations are restricted through Data Passport Controls, UK-based contacts associated with a U.S. company might still be displayed when viewing that company.

Related Changes

With this update, we've also centralized access to all compliance-related features by moving various privacy settings to a newly established menu within the Admin Portal. Any previously-configured settings will continue to operate without interruption.

- The **Suppression** tab includes controls for master suppression, do not call suppression, hiding EU contacts, custom contact detail suppression, and email suppression.
- The **Content Enablement** tab includes controls to enable additional company data and to control the visibility of third-party sourced data for ZoomInfo Chrome extension users.



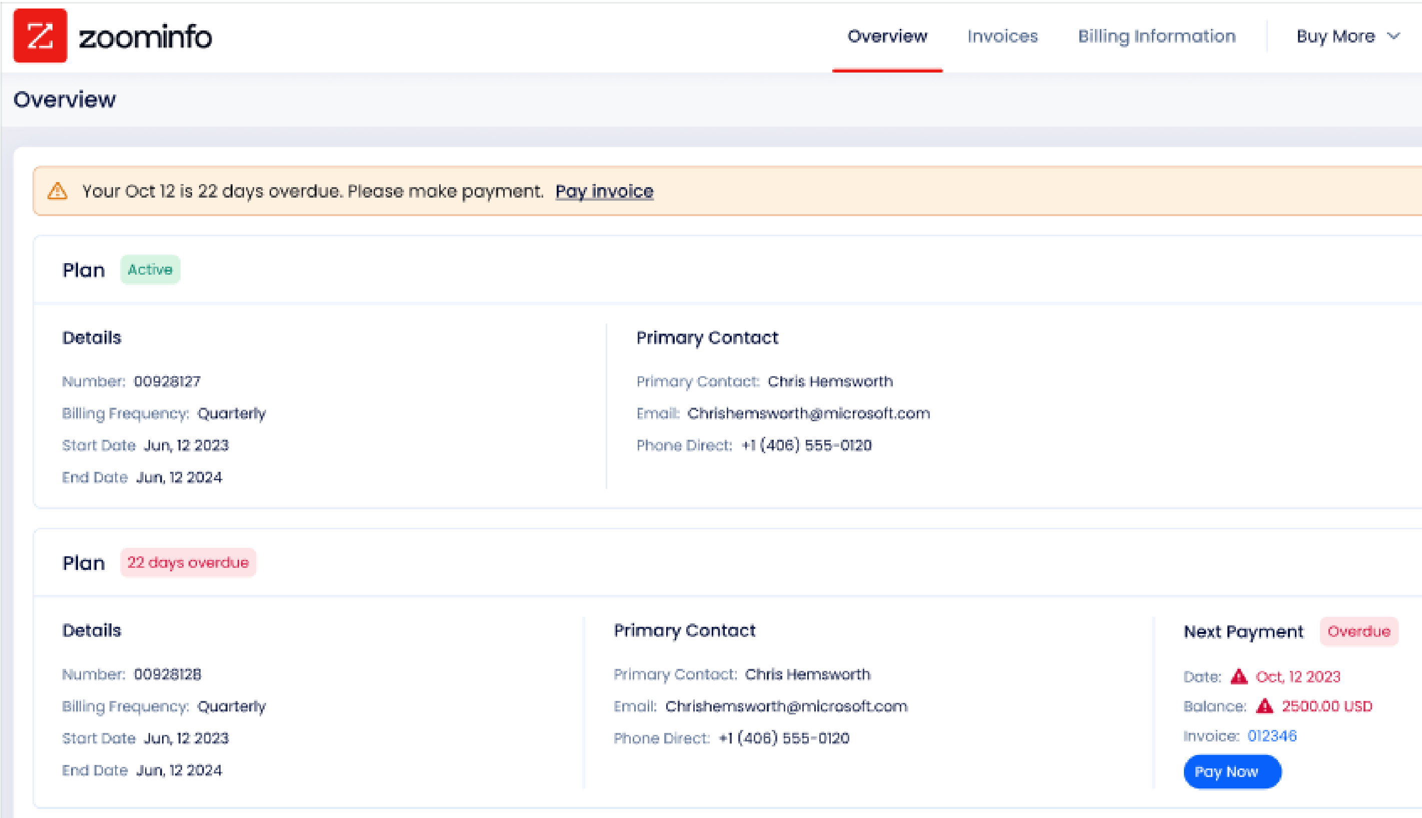
Billing Portal

Streamline the payment process for your organization using the self-service **Billing Portal**. This platform allows you to easily view and settle outstanding invoices, access your account's billing history, and acquire receipts for transactions. Additionally, you can store payment methods to facilitate automatic payments.

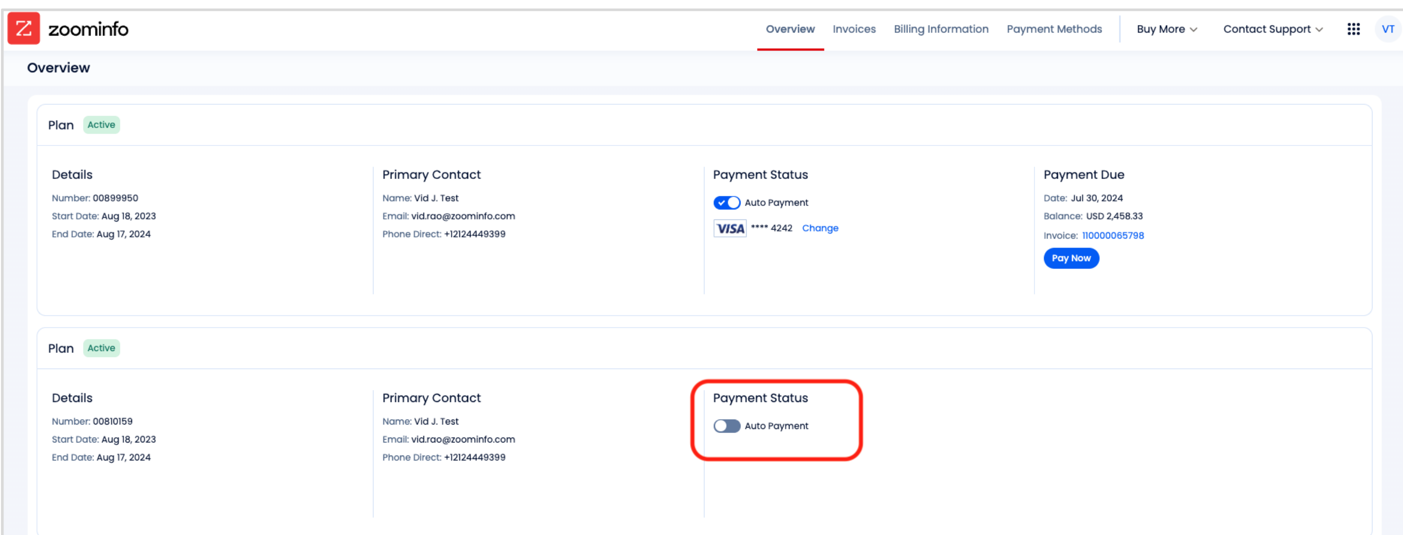
How It Works

In the **Admin Portal**, click **your initials** and select **Billing**. The **Overview** tab shows your plans and provides an option to pay any invoices due. If you have any due or overdue invoices, you can click **Pay Now** to make a payment.

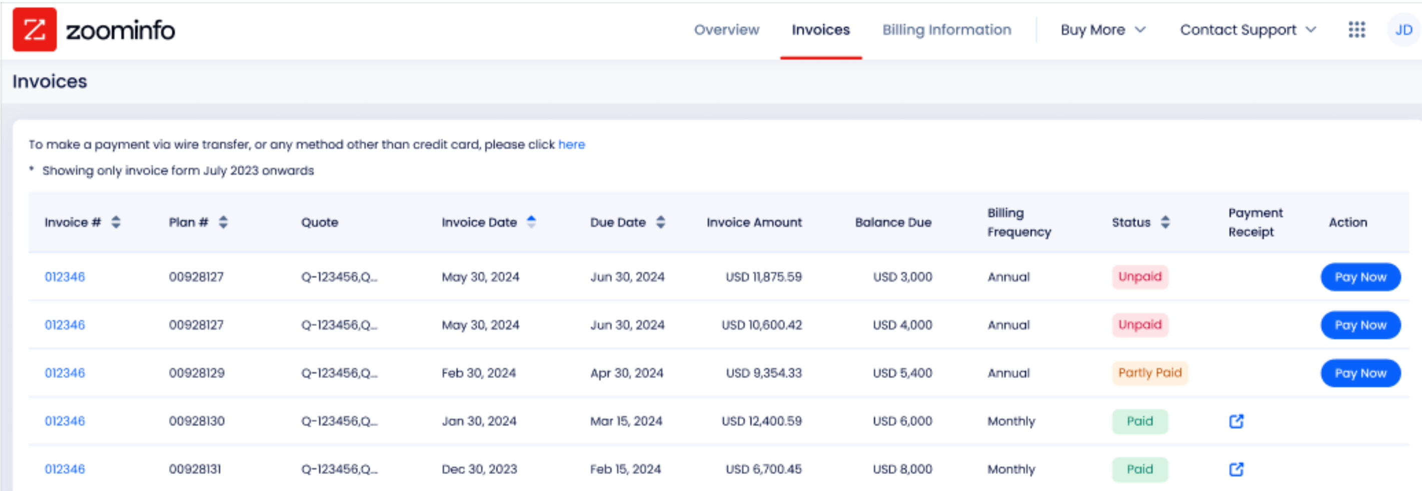
You can also log in to the Billing Portal directly at billing.zoominfo.com.



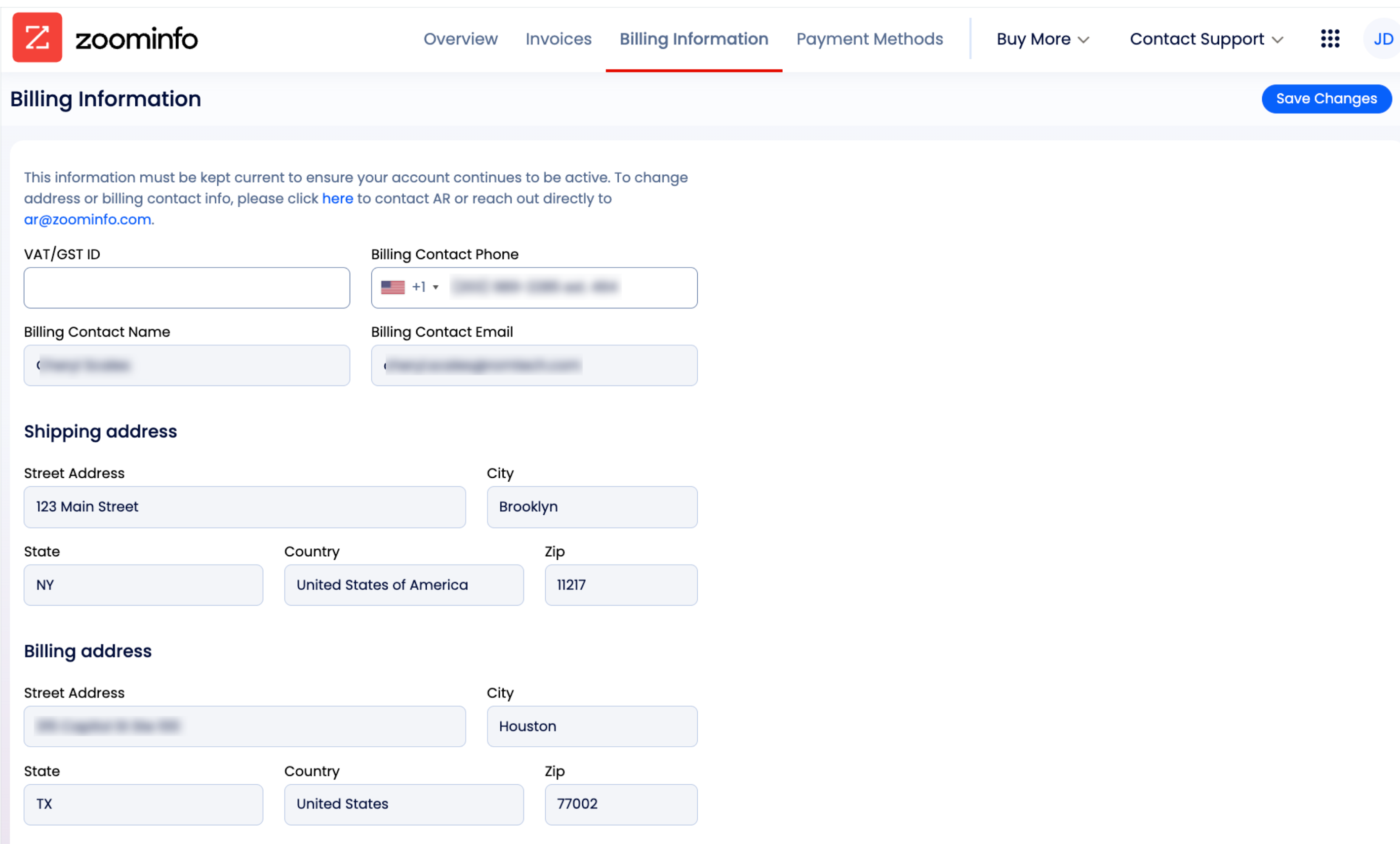
You can automate your payments by toggling on **Auto Payment** and adding a credit card.



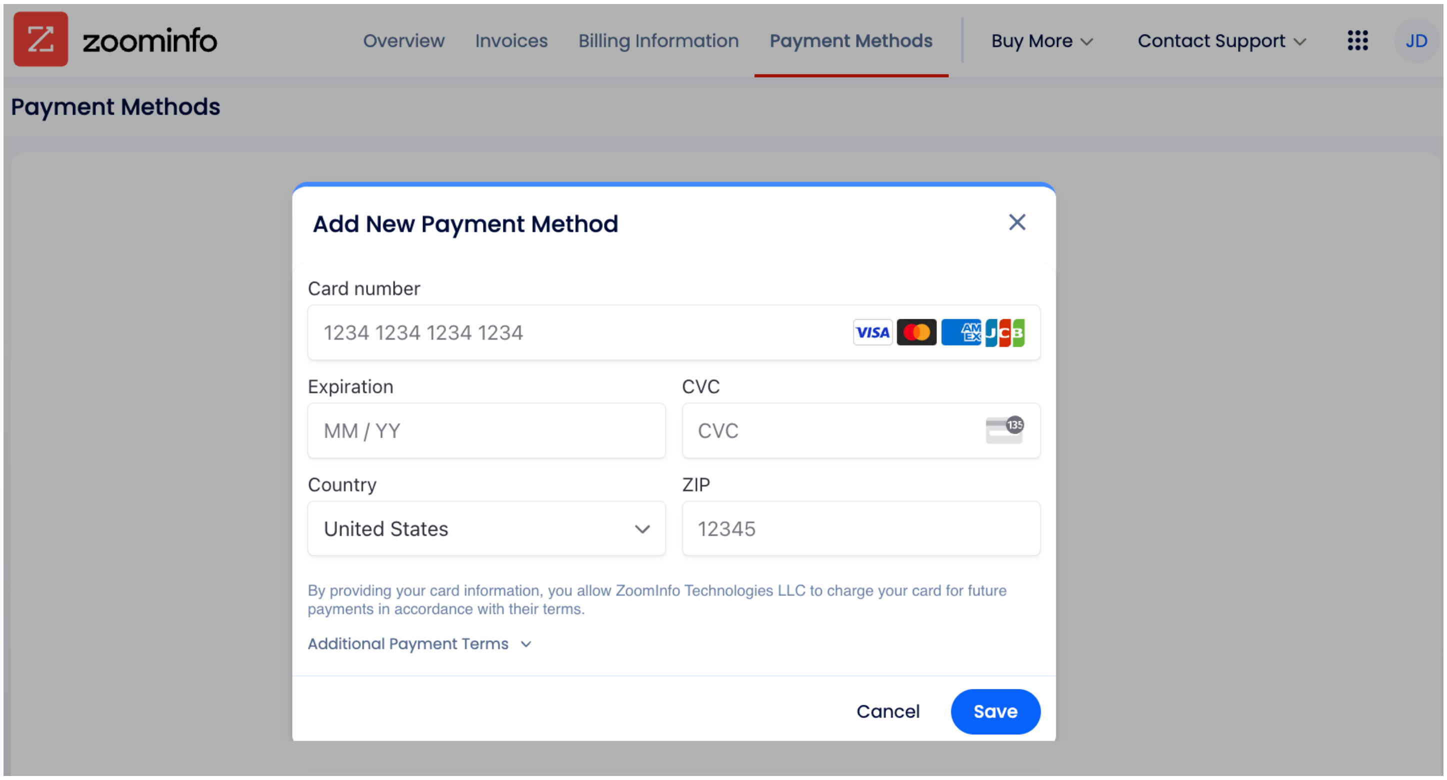
To see all invoices and billing history, click the **Invoices** tab.



You can view and manage your **Billing Information**.



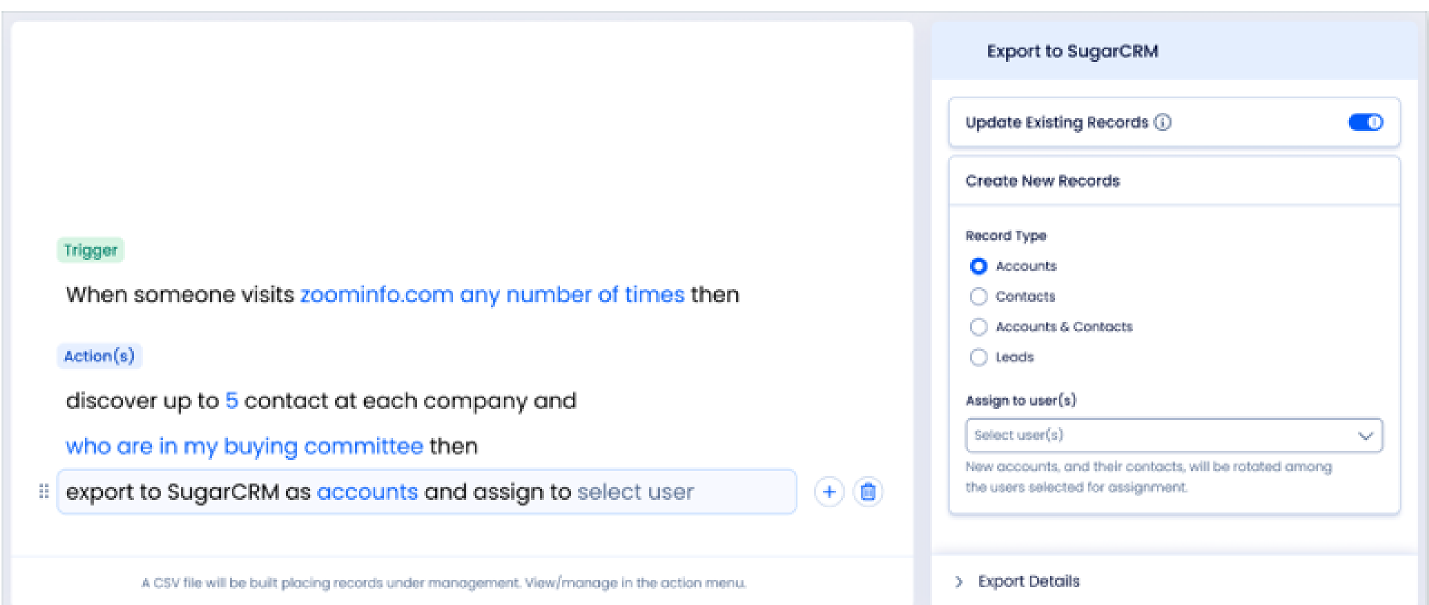
Click **Payment Methods** to see your payment methods or add a new method.



Workflows: Export to SugarCRM

ZoomInfo Workflows help you automate your sales and marketing activities based on your target market's buying signals. If your organization is connected to our [SugarCRM integration], users can now create Workflows that effortlessly export accounts, contacts, or leads directly to SugarCRM.

Users can customize Workflows to export data to SugarCRM, allowing them to update existing records or create new ones. Additionally, there's the flexibility to assign these new records to one or multiple users, enhancing data management and collaboration.



Apr 15, 2024 ZoomInfo Sales Release

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Gong Engage Integration: HubSpot Support

In our January release, we introduced the Gong Engage integration for organizations with Salesforce. With this release, the Gonge Engage integration now supports HubSpot.

The ZoomInfo and Gong integration streamlines the direct export of contacts from ZoomInfo to Gong Engage. It leverages HubSpot to create contacts in the CRM, which are then automatically added to Gong flows.

Set Up the Integration

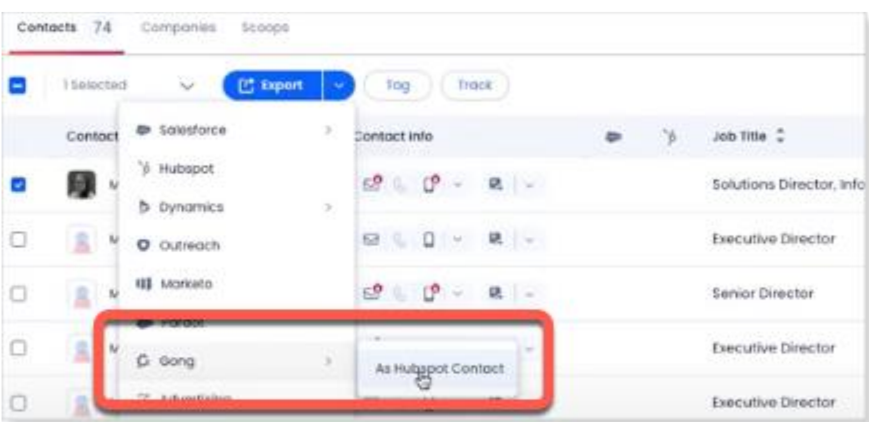
A ZoomInfo admin sets up the Gong Engage integration.

1. Ensure that your HubSpot integration is connected *using the service account option* as described in the ZoomInfo HubSpot Integration Guide.
2. Once this connection is in place and activated, setting up the Gong integration is simple. See the Gong Engage Integration Guide for details.

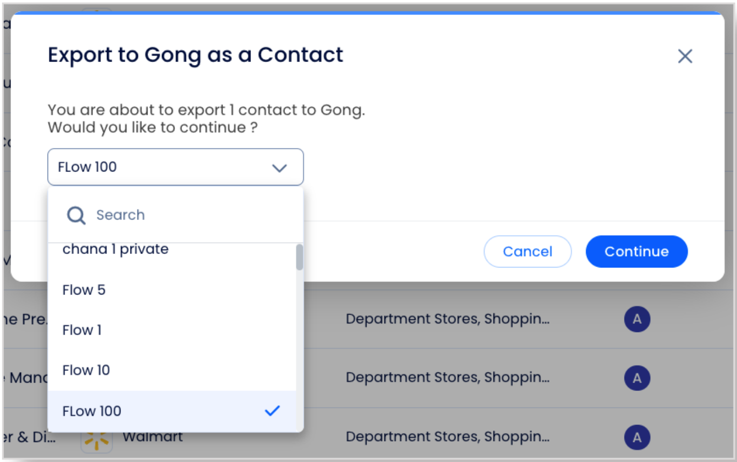
How It Works for Users

ZoomInfo Sales users can easily export contacts to Gong Engage as HubSpot contacts.

1. In ZoomInfo Sales, select one or more contacts to export.
2. From the **Export** dropdown, select **Gong** and click **As HubSpot Contact**.



3. Export to a specific **Gong Engage flow** in your Gong instance then click **Continue**.



4. You may be asked to associate the contacts with an existing company in HubSpot.

   Note: If a company for your selected contact(s) does not exist in HubSpot, a new company will be created in your HubSpot instance.

5. Click **Export**.

Once exported, you'll see the contacts in the Gong Engage flow.

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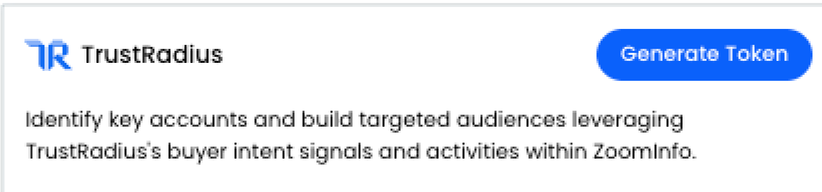
TrustRadius Buyer Intent Integration

TrustRadius and ZoomInfo customers now have the exciting opportunity to leverage TrustRadius buyer intent signals directly within ZoomInfo Sales! This powerful integration enables you to uncover more bottom-of-the-funnel accounts actively seeking your company on TrustRadius.

ZoomInfo administrators can easily activate the integration by linking their TrustRadius account with ZoomInfo. See the [TrustRadius Integration Guide] for details.



Through this seamless connection:

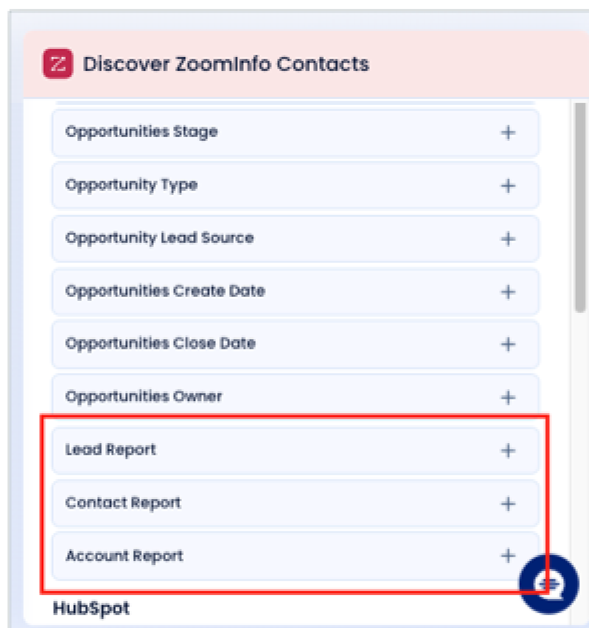
- ZoomInfo will automatically import TrustRadius buyer intent data nightly, ensuring timely insights.
- Your team can utilize TrustRadius buyer intent filters in Advanced Search along with ZoomInfo's extensive data to identify decision-makers at accounts showing active interest on trustradius.com, including competitor views, profile engagements, ad interactions, and more.

This integration is designed to enhance your strategic outreach by pinpointing prospects demonstrating clear buying signals, streamlining your sales process, and increasing conversion opportunities.

New Salesforce Report Filters in Workflows

Users who leverage Salesforce filtering and have set up reports in Salesforce can now utilize object-based Salesforce reports as filters when crafting a Workflow. Users can now filter on the following reports:

- Contact Report
- Lead Report
- Account Report

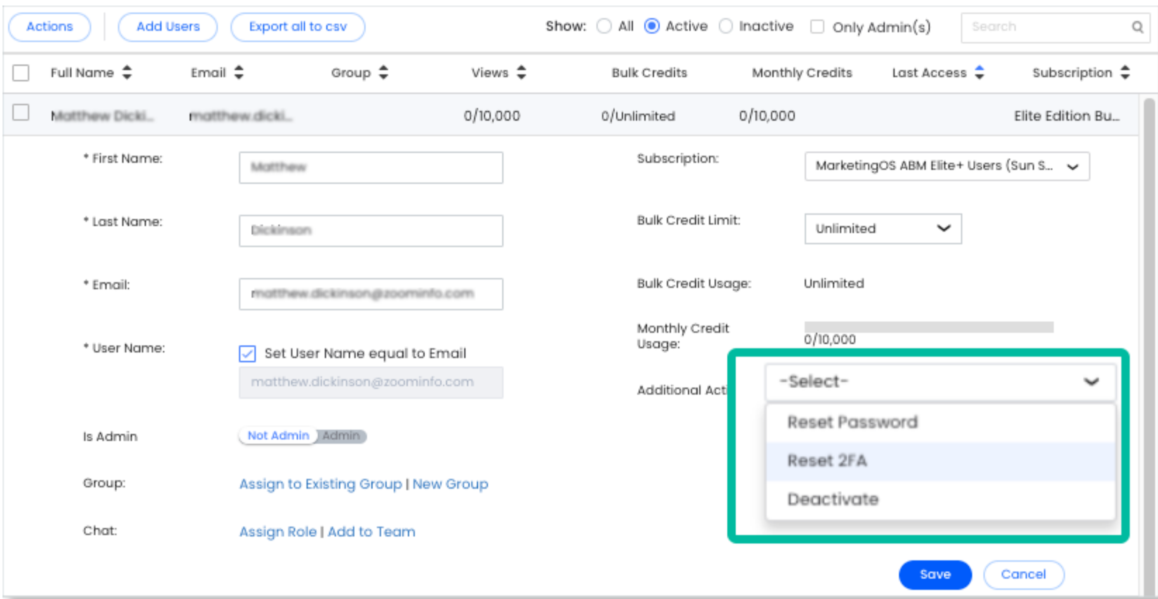


Reset Two-Factor Authentication for Users in the Admin Portal

ZoomInfo administrators have the ability to swiftly reset two-factor authentication (2FA) for their users. Common reasons for requesting a 2FA reset include changing devices, temporary inability to access a device, or altering usernames in the admin portal while an account remains linked to a previous 2FA setup.

From **Admin Portal > User Management**:

1. Click a user to expand the profile.
2. Under **Additional Actions**, click **Reset 2FA**.



When an admin selects **Reset 2FA**, the user will receive an email confirmation. On subsequent login, the user will be asked to set up their 2FA again.

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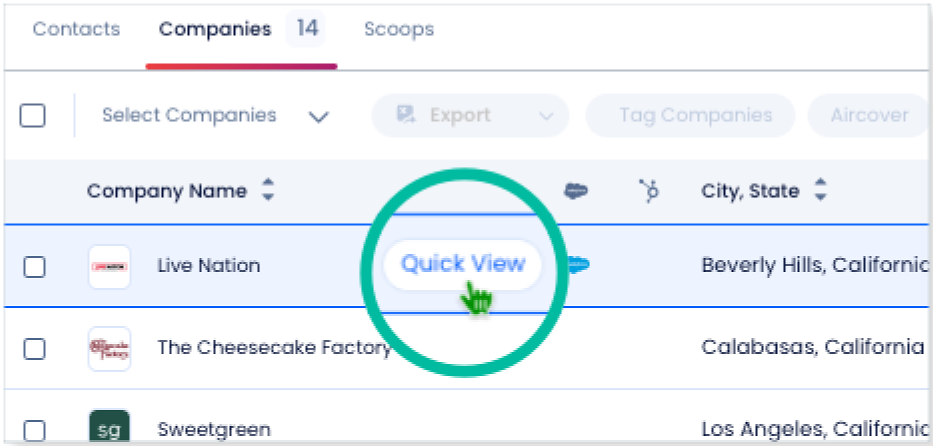
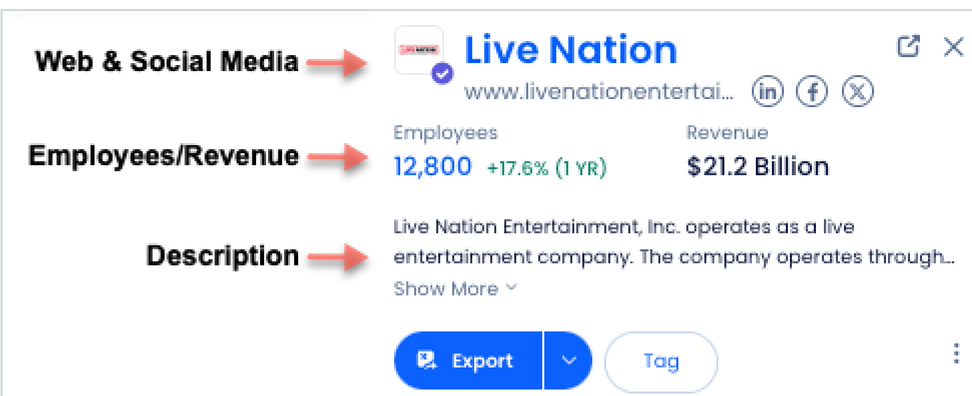
Improved Company Quick View Pane

We have improved the Quick View panel for companies to elevate your user experience - highlighting vital information upfront and enhancing the visual appeal of the many data points displayed in this view.

When viewing a list of companies, click **Quick View**.



In the pane that opens on the right, we now highlight key details for the company like **web and social media links**, **employee count** and **growth percentage**, and **revenue**. We've also pulled the **company description** to the top section.



The remaining portion of the company detail panel features a cleaner visual design, providing quick insights into a company to help you assess and take action.

Admins Can Now Update Intent Topics 12 Times Per Year

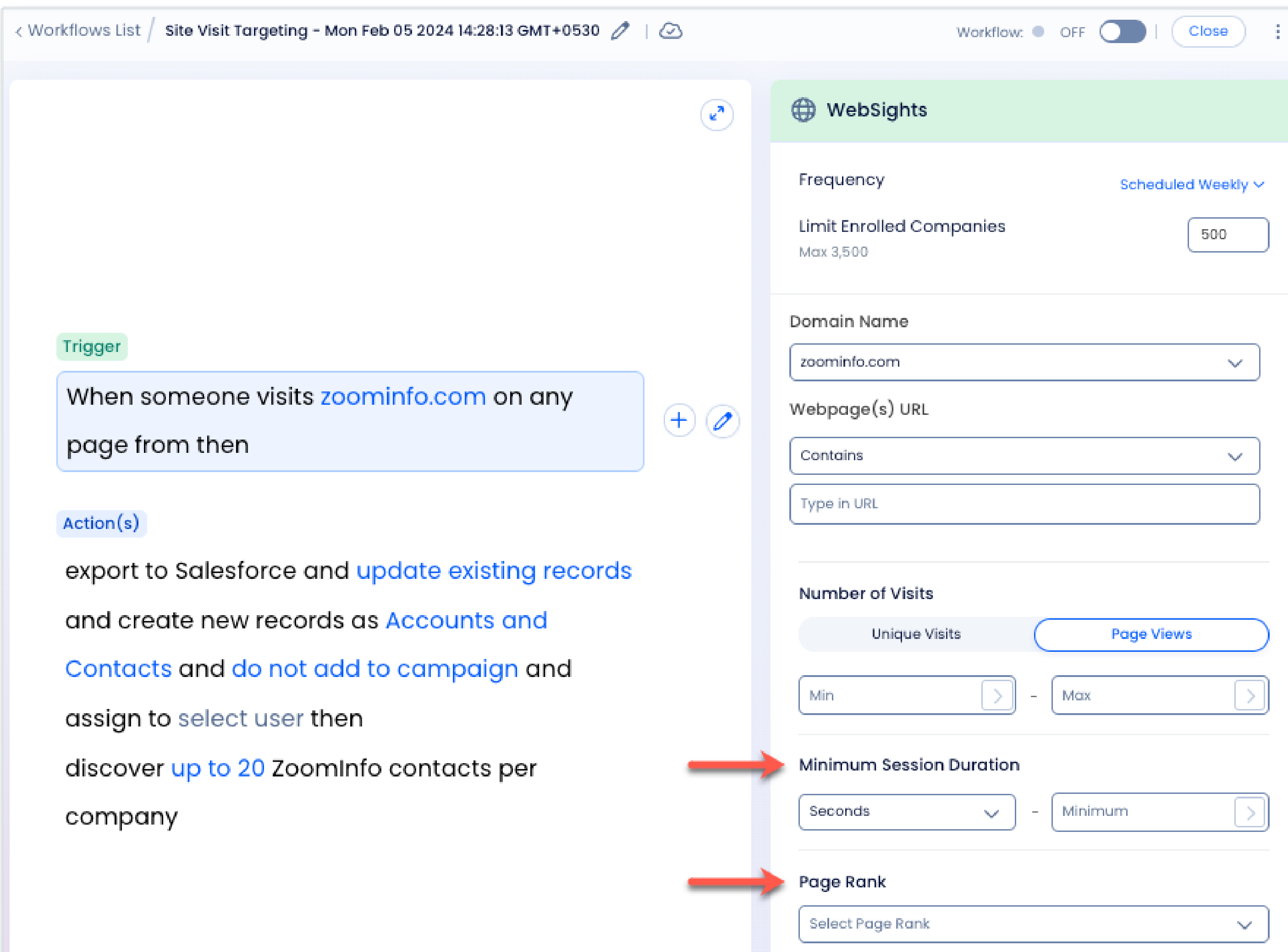
Admins can now change their organization's Intent topics up to 12 times per year (up from 3) directly in the Admin Portal. This provides you with greater flexibility in refining your Intent signals, and is based on your feedback.

For details on how to manage your organization's Intent topics, see How to Use Self-Serve Intent Topics.

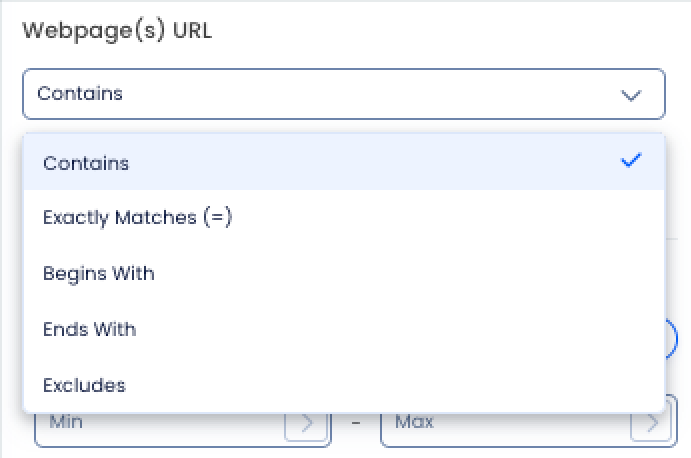
Workflows: New Filtering Options for the WebSights Trigger

We've improved your filtering options when configuring a Workflow that uses the WebSights trigger.

First, we've added the ability to filter on **Minimum Session Duration** and **Page Rank**. These new filters help you further refine your Workflow actions to net the most value, eliminating results from visitors who don't stick around long enough, and using your WebSights page rank settings to focus on visits to pages you truly care about. These new filters are only available if you set the trigger Frequency to **Daily** or **Weekly**.



In addition, we've added more options to the **Webpage(s) URL** filter to give you more granular control over the webpage URL(s) you're targeting with the Workflow.



Data Improvements

Earnings Call Scoops

ZoomInfo leverages AI on a daily basis to extract valuable insights from quarterly and annual filings, as well as earnings calls. We gather information on growth opportunities, competition, risks, goals, initiatives, pain points, strengths, weaknesses, and threats. These details can be accessed in a couple of ways: through our Earnings Cube, where you can utilize the data in your own AI models or infrastructures, or via our Earnings Scoops within both ZoomInfo platforms.

Enhanced Search Relevance

Our latest Search Relevance updates act as an intelligent filter, ensuring you discover the most accurate and valuable results. We have enhanced the algorithm powering this filter, making it even more proficient at finding results that closely aligns with your query. We achieved this by incorporating the concept of popularity into our ranking system. Additionally, we analyze customer engagement on our platform, such as views and exports, to better prioritize popular profiles in Quick Search. As a result, your search results are now even more relevant than ever before.

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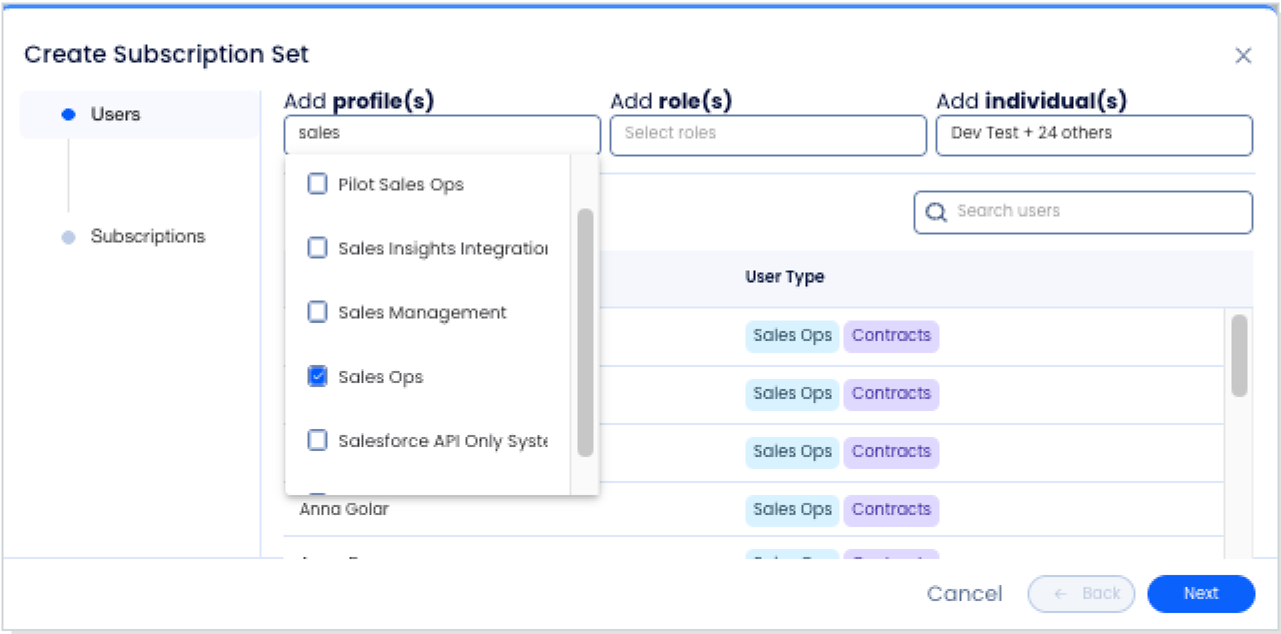
CRM Auto Provisioning (Salesforce)

ZoomInfo now supports CRM auto provisioning. This first release is specifically for organizations that are integrated with Salesforce, letting you control the users you want to provision for ZoomInfo products directly within Salesforce.

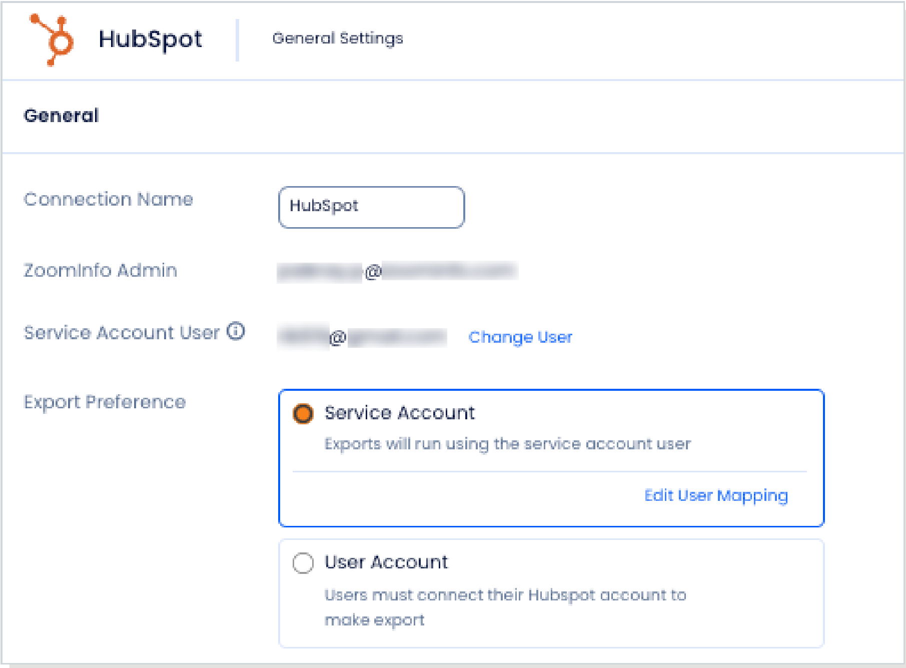


See the ZoomInfo CRM Auto Provisioning Implementation Guide for how to set up auto provisioning using your connected Salesforce instance to manage your users and product subscriptions.

Integrations: Auto Connect All HubSpot Users from the Admin Portal

Instantly connect your organization's users to HubSpot directly from the Admin Portal using a service account, eliminating the need for users to individually connect using their own credentials.

- A service account simplifies the onboarding process as your organization evolves and changes, and eliminates the need for your Support team to troubleshoot individual HubSpot connection issues for your users.
- Prior to this update, each ZoomInfo user in your org was required to connect to HubSpot using their own credentials in order to export records from ZoomInfo.

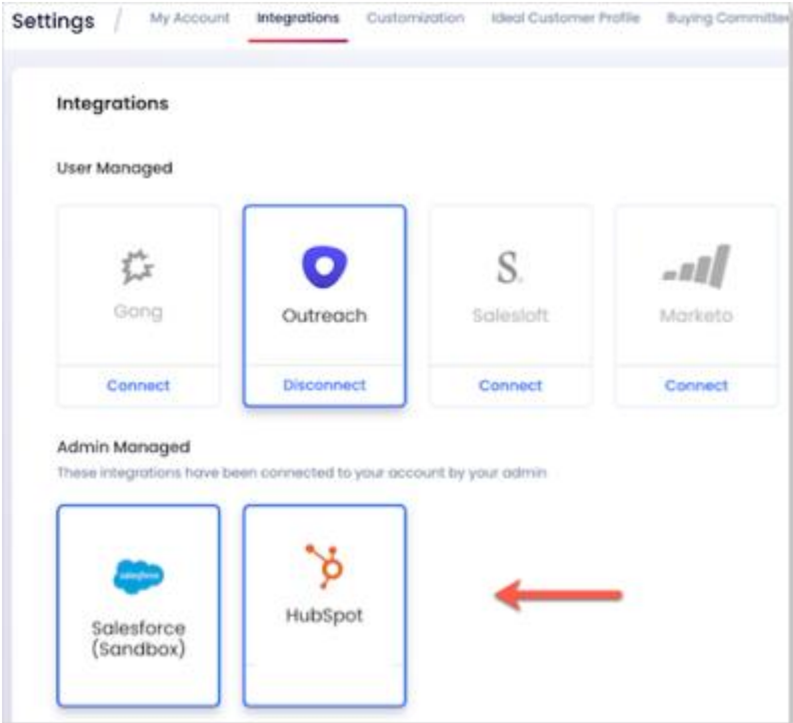


How it works (for new customers): The service account option is the default configuration when setting up the configuration. Admins can choose to automatically connect all their users to HubSpot or to have their users manually connect with their own usernames and passwords.

For details on setting up the HubSpot integration for the first time (including this capability), refer to the [HubSpot Integration Guide](#).

How it works (for existing customers): Admins can refer to *Switching from User Account Option to Service Account Option* in the HubSpot Integration Guide for instructions.

How it works (for users): If your org is connected to HubSpot **using the Service Account option**, users and other admins* will not see an option to disconnect themselves from the integration when they navigate to their integration settings (**initials > Settings > Integrations**).



**Other admins are any ZoomInfo admins defined in your org other than the primary connected admin that set up the integration.*

Only the primary admin will see the option to disconnect. Clicking Disconnect will disconnect the integration for the whole org, stopping export capabilities and HubSpot Filtering jobs until a connection is re-established. Configuration settings for the integration remain intact.

If your org connects to HubSpot **using the User Account option** (which requires each user to connect), users will see an option to disconnect themselves from the integration.

Integrations: Gong Engage

Organizations with both ZoomInfo Sales and Salesforce can now integrate with Gong. This will allow ZoomInfo Sales users to add contacts from ZoomInfo Sales to Gong Engage flows for sales engagement.

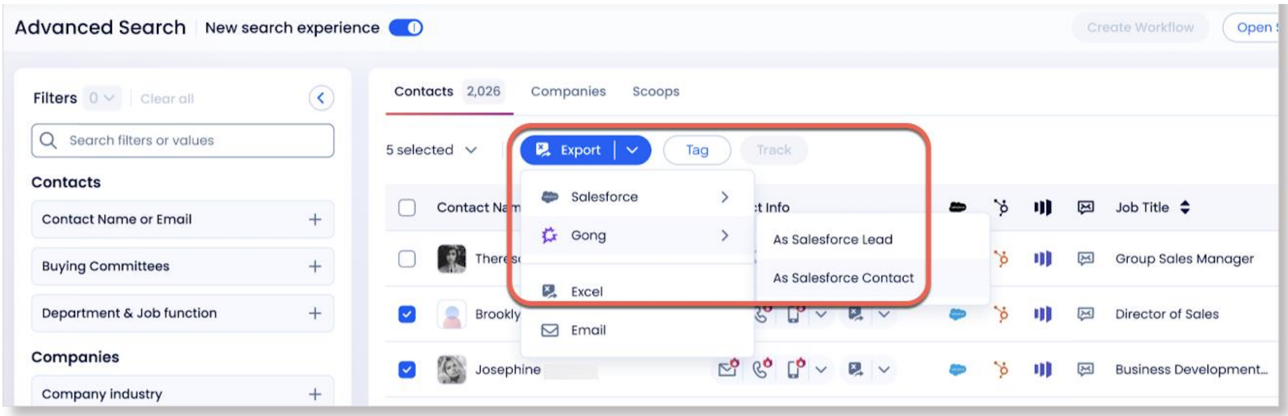
Previously, importing ZoomInfo Sales data into Gong involved exporting a CSV from ZoomInfo Sales and manually uploading it into Gong. This direct integration greatly reduces time and effort.

Integration setup (admins):

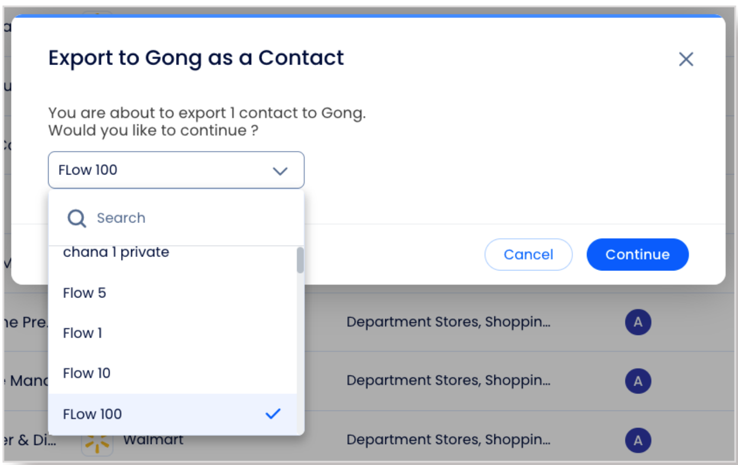
Admins managing the ZoomInfo Sales and Salesforce integrations can find details on setting up the Gong integration in the Gong Engage Integration Guide.

How it works (for users):

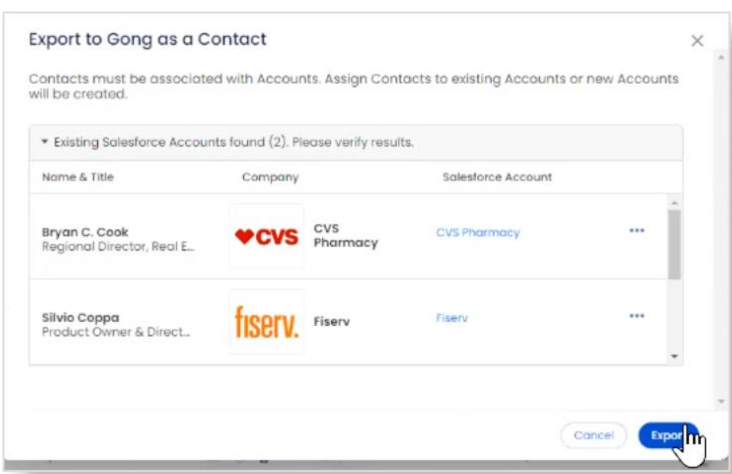
1. In ZoomInfo Sales, select contacts for export.
2. From the **Export** dropdown, select **Gong**.
3. Select **As Salesforce Lead** or **As Salesforce Contact**.



4. Export to a specific **Gong Engage flow** in your Gong instance then click **Continue**.



5. You may be asked to associate the contacts with an existing account in Salesforce.



Note: If an account for your selected contacts does not exist in Salesforce, a new account will be created in your Salesforce instance.

6. Click **Export**.

7. Once exported, you will see the contacts in the Gong Engage flow.

Integrations: Pardot Export Limit Increased to 10k

ZoomInfo admins can now increase Pardot export limits for their organization's users up to 10K. The previous limit was 25.

How it works (for admins):

1. On the **Export** tab for the integration, set the maximum number of records a user can export to Pardot at one time.
2. Click **Save Changes** to apply the changes for all users in your organization.

In-Market Score Enhanced to Include Impressions and Clicks

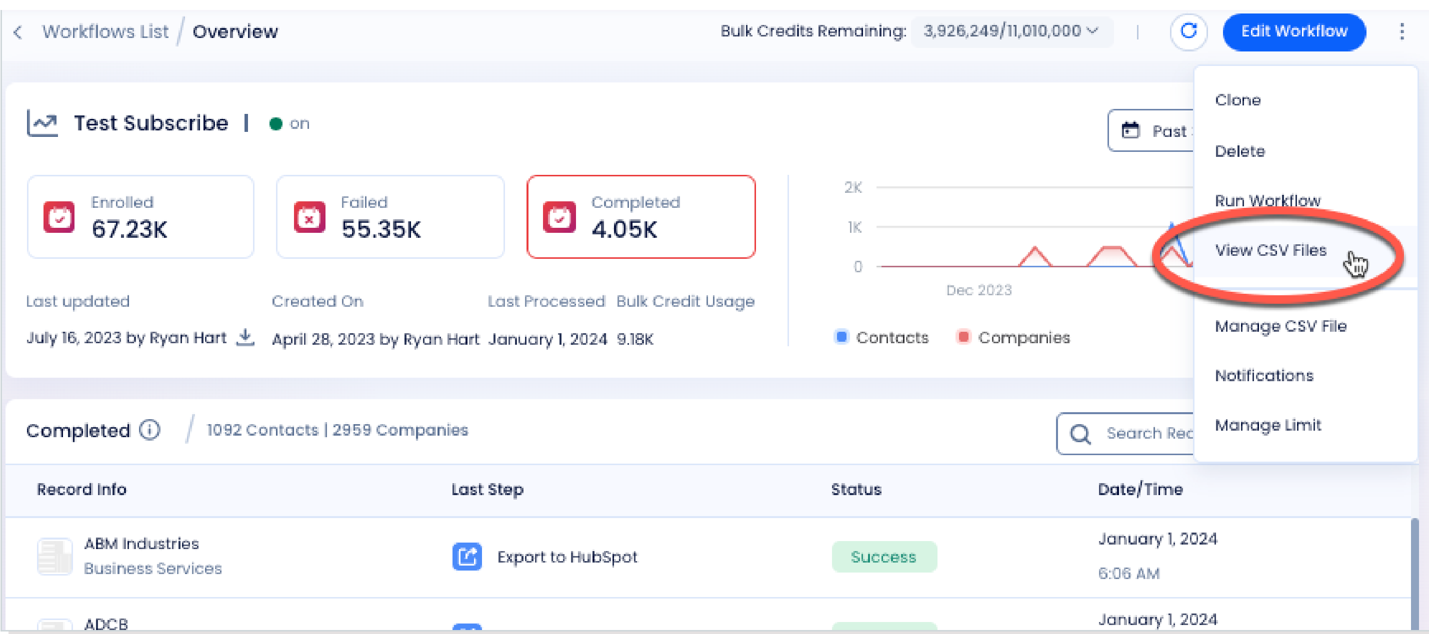
We've enhanced the calculation of our In-Market Score (IMS) to include advertising signals - specifically, **impression data** and **click data** for ads:

- **Impressions data** is an indicator of brand awareness
- **Click data** confirms brand awareness and interest in a product or service

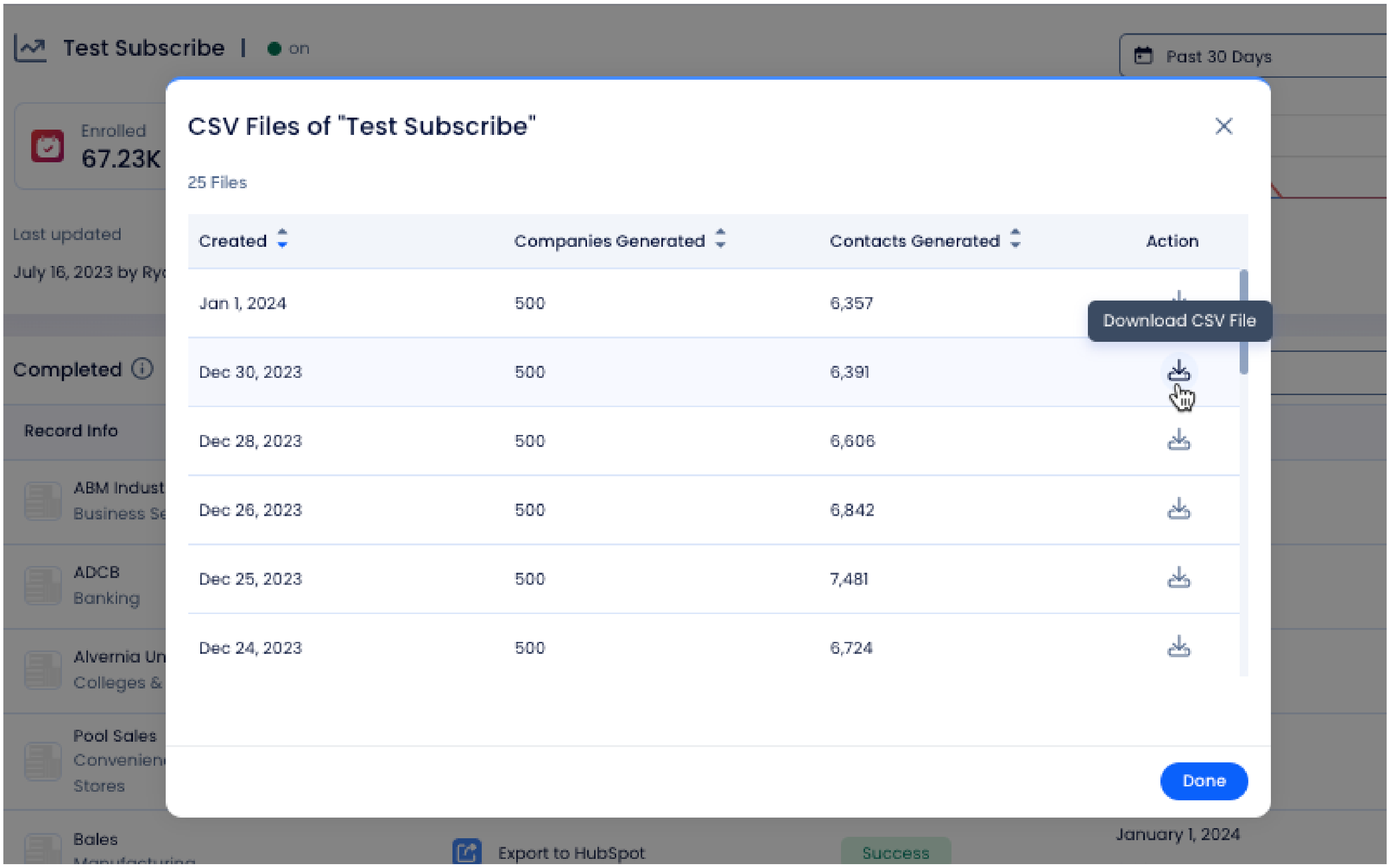
This enhancement adds another signal based on account-level awareness, creating a more precise score to better understand what accounts are in the market.

Workflows: Easy access to view and download CSV files for Workflow runs

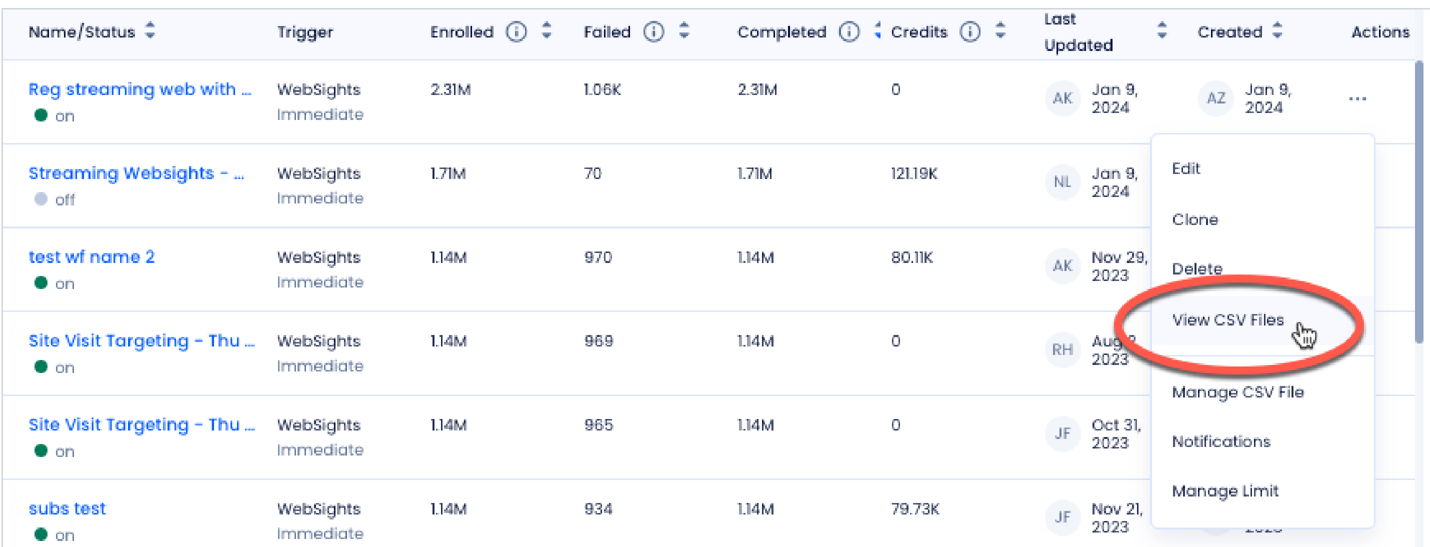
When viewing a Workflow, you can now view a list of CSV files for each time a Workflow was run.



A window opens showing a list of CSV files with a download option for each.

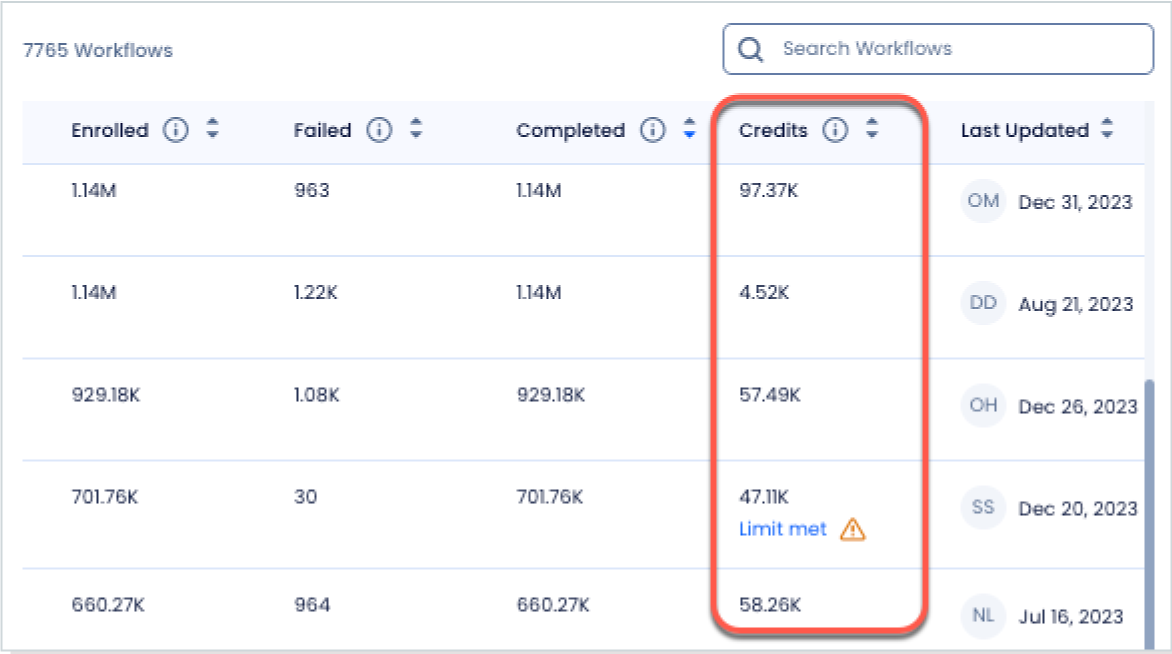


You can also access the list of CSV files from the Workflows List page.



Workflows: View Credits Consumed for Each Workflow

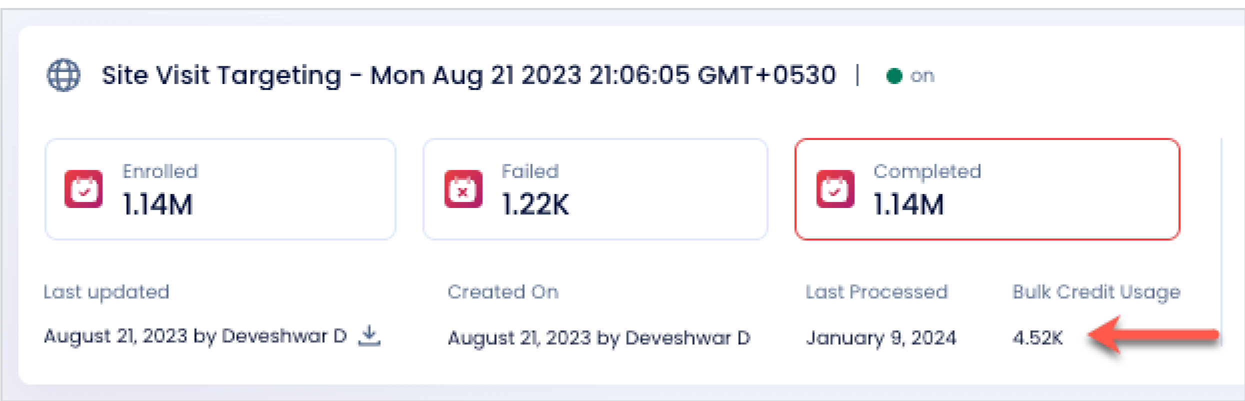
When viewing the Workflows List, you can easily see the number of credits consumed by each Workflow.


7765 Workflows

Search Workflows

Enrolled	Failed	Completed	Credits	Last Updated
1.14M	963	1.14M	97.37K	OM Dec 31, 2023
1.14M	1.22K	1.14M	4.52K	DD Aug 21, 2023
929.18K	1.08K	929.18K	57.49K	OH Dec 26, 2023
701.76K	30	701.76K	47.11K Limit met	SS Dec 20, 2023
660.27K	964	660.27K	58.26K	NL Jul 16, 2023

You'll also see this same number reported on the Workflow Overview page.

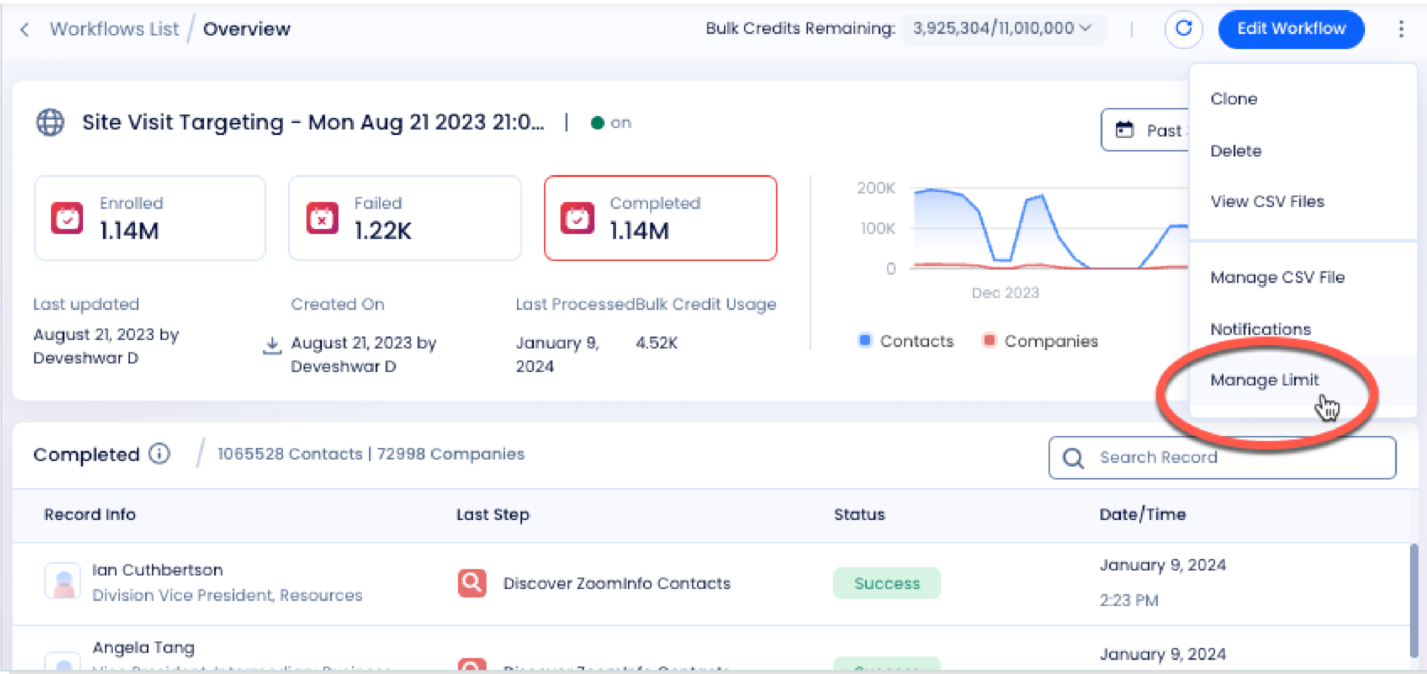


Workflows: Ability to Manage Bulk Credit Limits Per Workflow

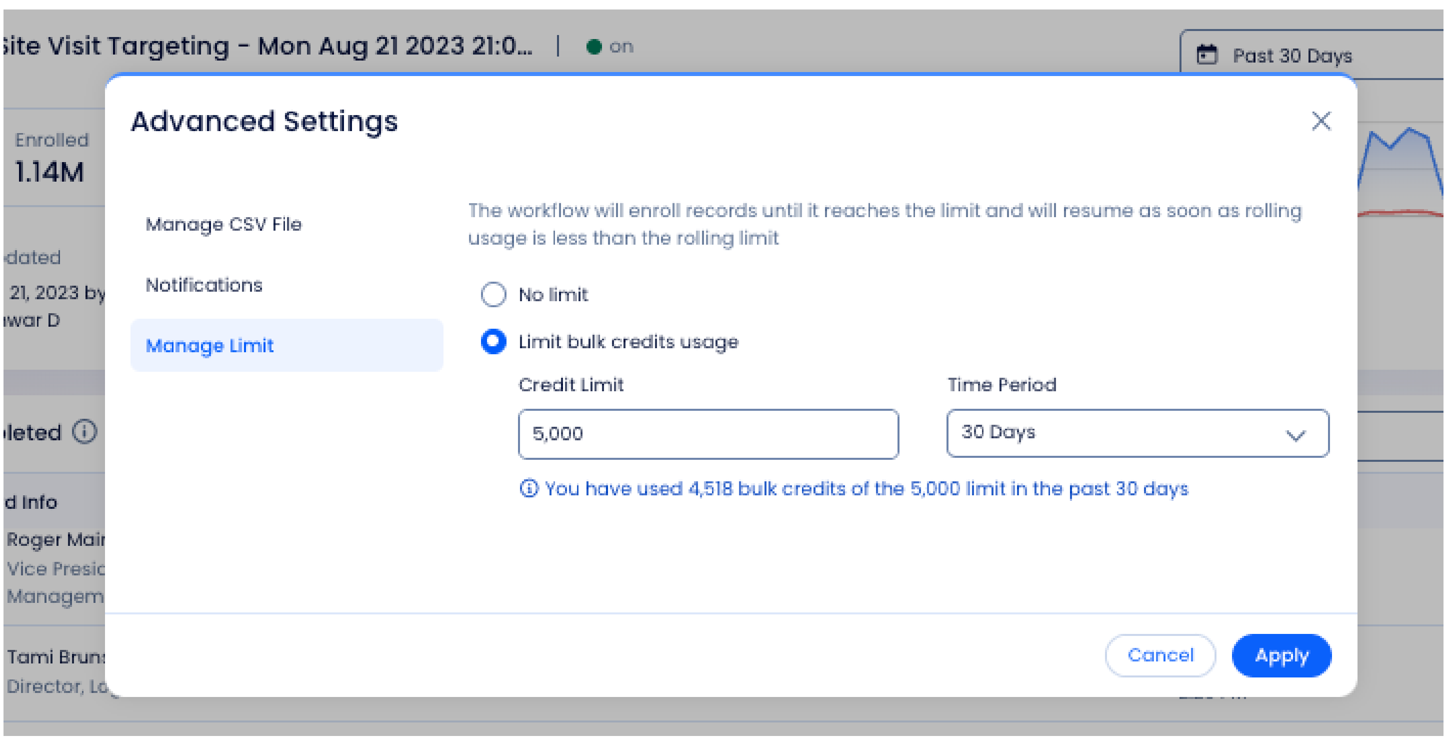
You can apply a limit to the amount of credits each Workflow consumes over a period of time. You can do this from the Workflows List and the Workflow Overview page.

Here's an example showing the Workflow Overview page.

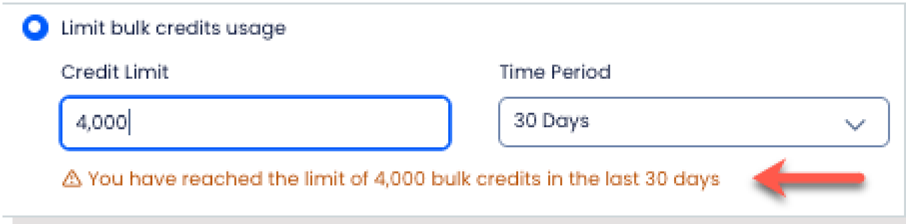
1. Select **... > Manage Limit**.



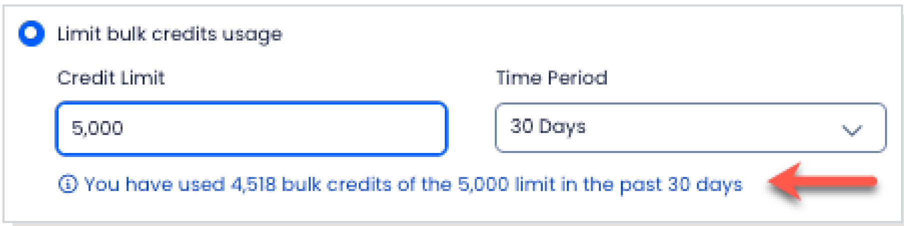
2. Select **Limit bulk credits usage** and set the **Credit Limit** and **Time Period** to the desired values.



3. As you change the **Credit Limit** or **Time Period** values, the information message dynamically displays credits consumed for past runs of the Workflow over the same time period.

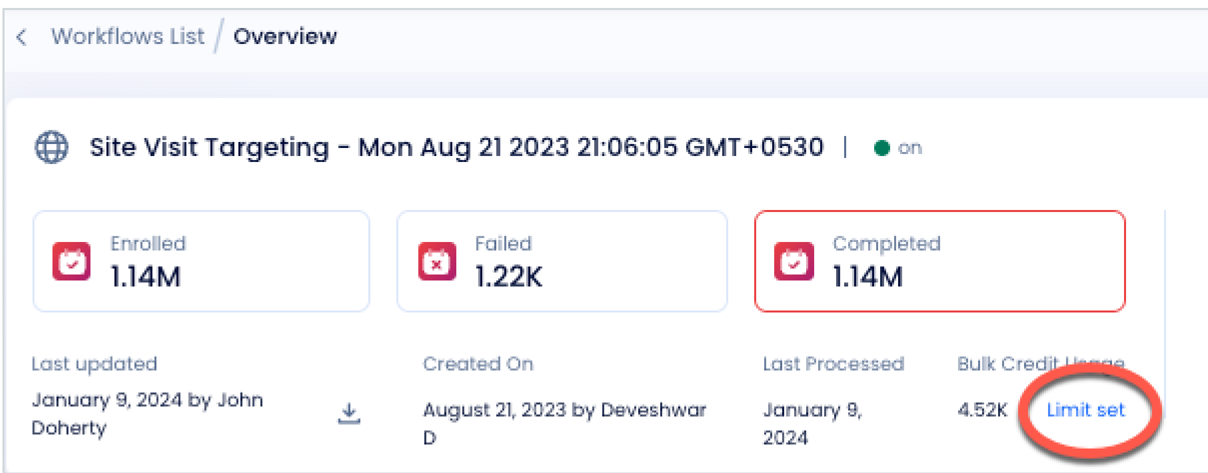


4. Use this information to inform your choices on setting a reasonable limit.



5. When done, click **Apply**.

   A **Limit set** indicator is added to show that a credit limit has been set for this Workflow.



6. You can click the **Limit set** link to make adjustments to the limit.

Data Improvements

Foundational Data Summary

During the last quarter of 2023 our data teams assessed and validated over 1.5M data points, including company profiles, websites, addresses and phone numbers. This resulted in over 5.5M company profiles added to our data foundation.

Enhanced Company Accuracy

We've updated over 4.5M company profiles, resulting in higher headcount accuracy - especially for companies with under 200 employees. Additionally, we've updated over 25k publicly-traded company profiles with up-to-date revenue data.

International Data Expansion

Our international data coverage increased by 25% for company coverage in Asia. We also saw a 476% increase in mobile coverage in the EU. Our international data coverage for companies, contacts, emails and phone numbers will continue to grow in 2024.