

2024 ZoomInfo Sales Release Notes

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

Previous Releases

[Jun 18, 2024](#)

[May 21, 2024](#)

[Apr 15, 2024](#)

[Mar 18, 2024](#)

[Feb 20, 2024](#)

[Jan 17, 2024](#)

[2023 \(All Releases\)](#)

[2022 \(All Releases\)](#)



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Jul 16, 2024 ZoomInfo Sales Release

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[Auto-Connect SugarCRM Users from the Admin Portal](#)

[Salesloft Account Ownership Update](#)

[Workflows: Scoops Description Keywords Filter in the Scoops Trigger](#)

zoominfo Copilot

Have you checked out ZoomInfo Copilot?

Copilot is our AI-driven solution that will revolutionize the way you sell. Give your teams an unfair advantage to focus on the best accounts, spend more time selling, and win faster.

[Video Quick Tour](#)

[Blog Post: Introducing Copilot](#)

[What's New](#)

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.

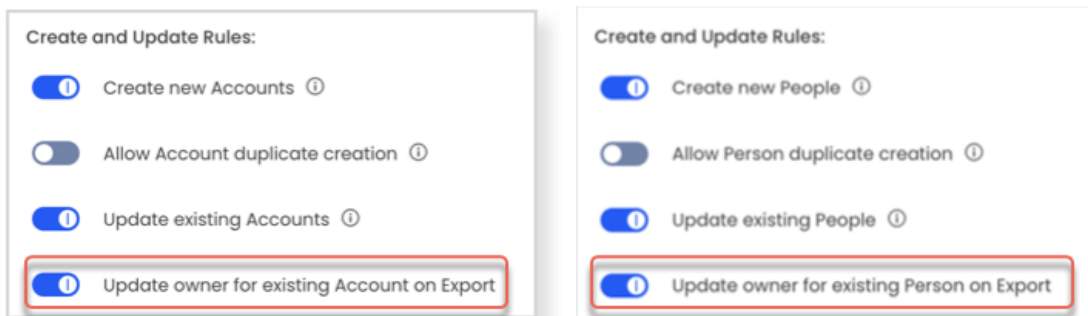
How It Works (for Users): If your org is connected to SugarCRM **using the Service Account option**, users and other admins will not see an option to disconnect themselves from the integration when they navigate to their integration settings (**initials > Settings > Integrations**).

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 500

Max 3,500

Scoops Description Keywords

enterprise software  acquisition  acquire 

Clear

Enter value 

Scoops Types

21 selected Clear All

All

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Highlights

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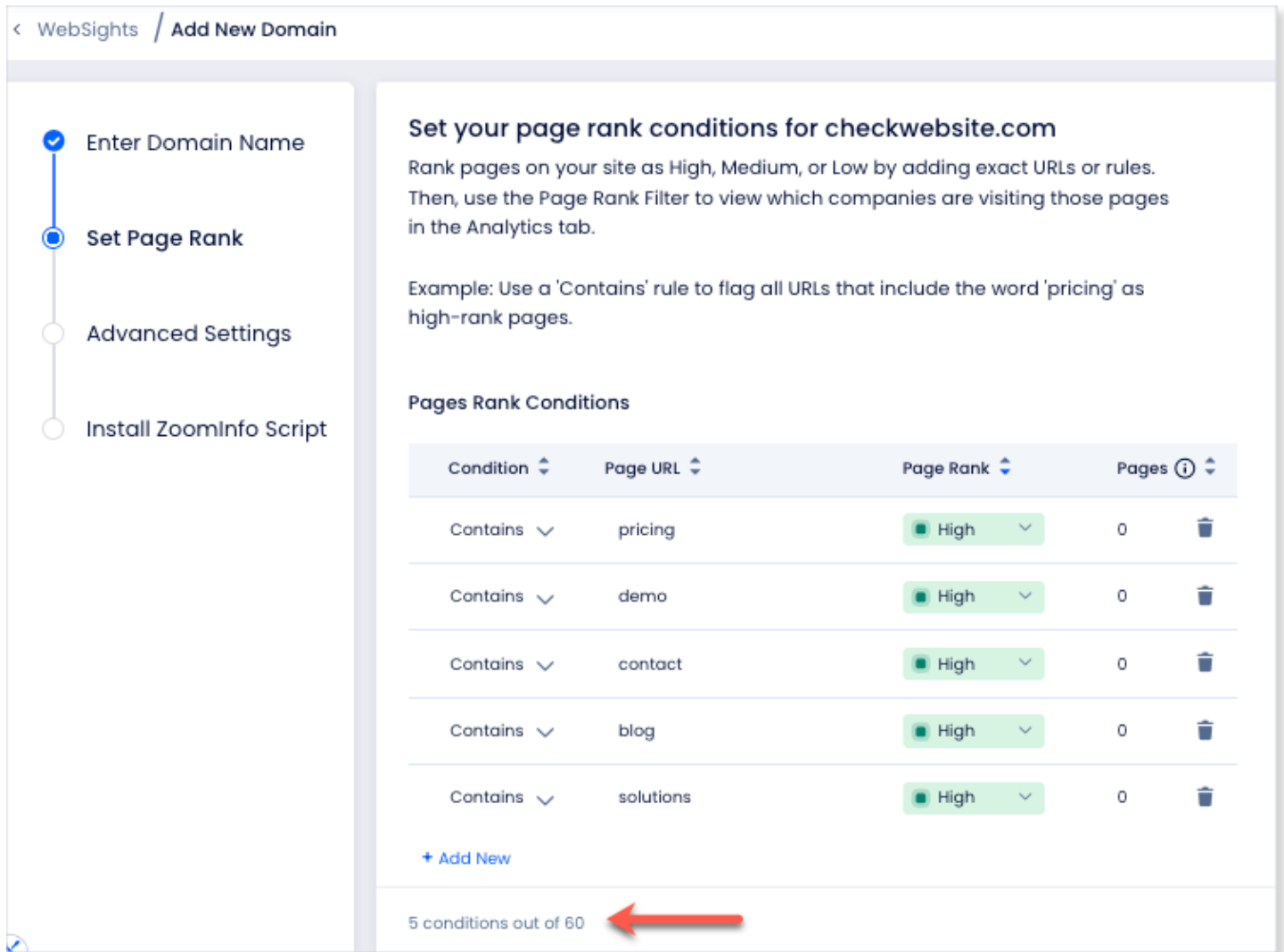
[Intent from French and German Language Web Sources](#)



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.



The screenshot shows the 'Add New Domain' configuration page for 'checkwebsite.com'. The left sidebar contains a progress indicator with four steps: 'Enter Domain Name' (checked), 'Set Page Rank' (active), 'Advanced Settings', and 'Install ZoomInfo Script'. The main content area is titled 'Set your page rank conditions for checkwebsite.com' and includes instructions on ranking pages as High, Medium, or Low. Below this is an example rule: 'Contains' rule for 'pricing' set to 'High'. A table titled 'Pages Rank Conditions' lists five rules with columns for Condition, Page URL, Page Rank, and Pages. A red arrow points to the text '5 conditions out of 60' at the bottom of the table.

WebSights / Add New Domain

Enter Domain Name

Set Page Rank

Advanced Settings

Install ZoomInfo Script

Set your page rank conditions for checkwebsite.com

Rank pages on your site as High, Medium, or Low by adding exact URLs or rules. Then, use the Page Rank Filter to view which companies are visiting those pages in the Analytics tab.

Example: Use a 'Contains' rule to flag all URLs that include the word 'pricing' as high-rank pages.

Pages Rank Conditions

Condition	Page URL	Page Rank	Pages
Contains	pricing	High	0
Contains	demo	High	0
Contains	contact	High	0
Contains	blog	High	0
Contains	solutions	High	0

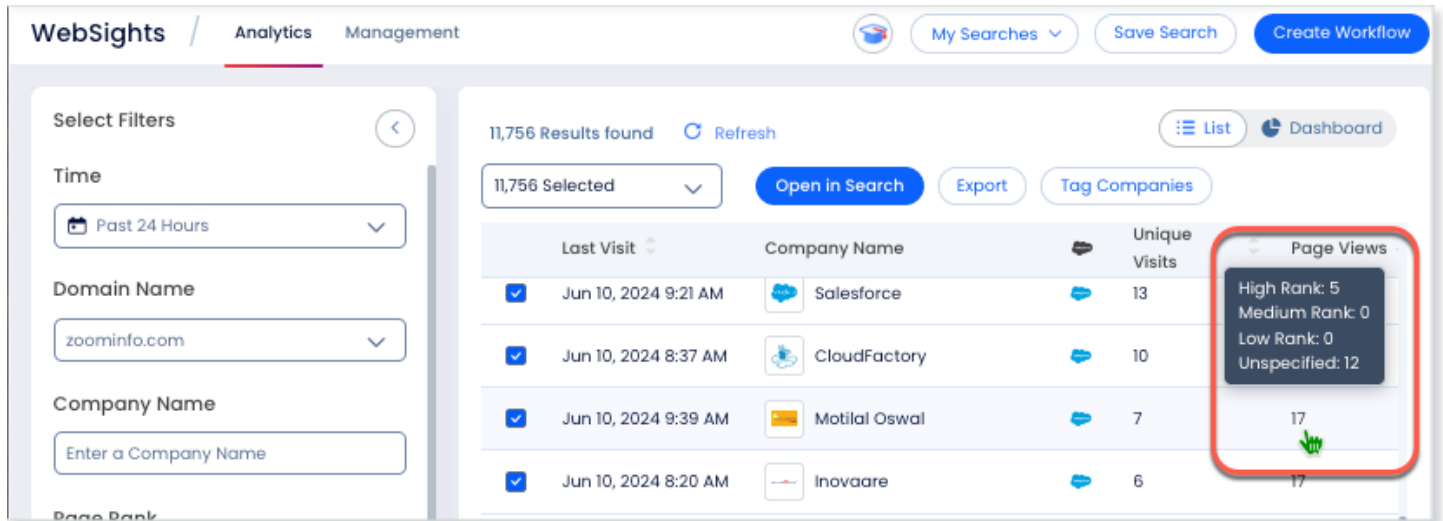
+ Add New

5 conditions out of 60

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.



The screenshot shows the WebSights Analytics interface. On the left, there are filter options for Time (Past 24 Hours), Domain Name (zoominfo.com), and Company Name. The main area displays 11,756 results found. A table lists search results with columns for Last Visit, Company Name, and Unique Visits. A tooltip is shown over the 'Page Views' column, displaying the following data:

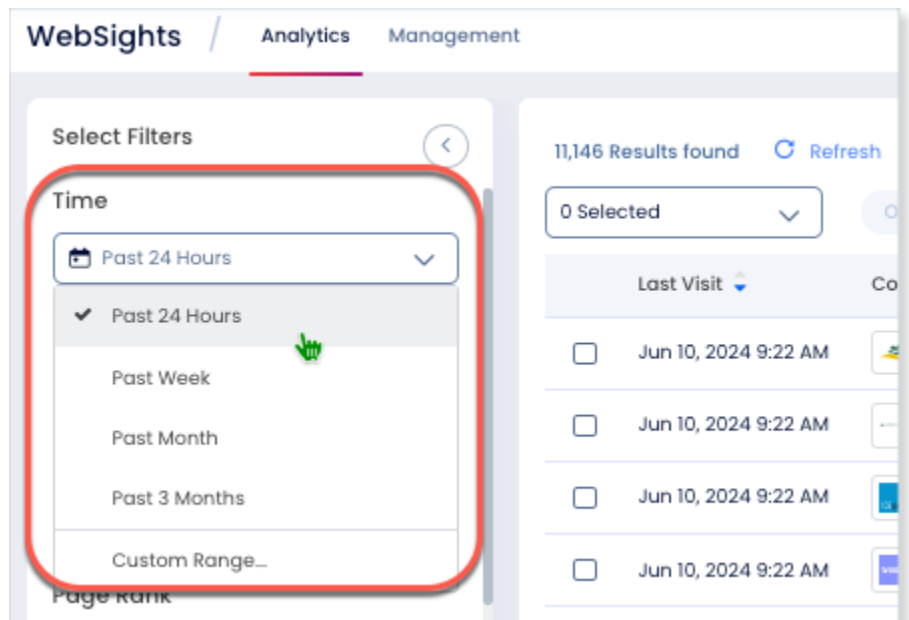
Rank	Count
High Rank: 5	13
Medium Rank: 0	10
Low Rank: 0	7
Unspecified: 12	6

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.

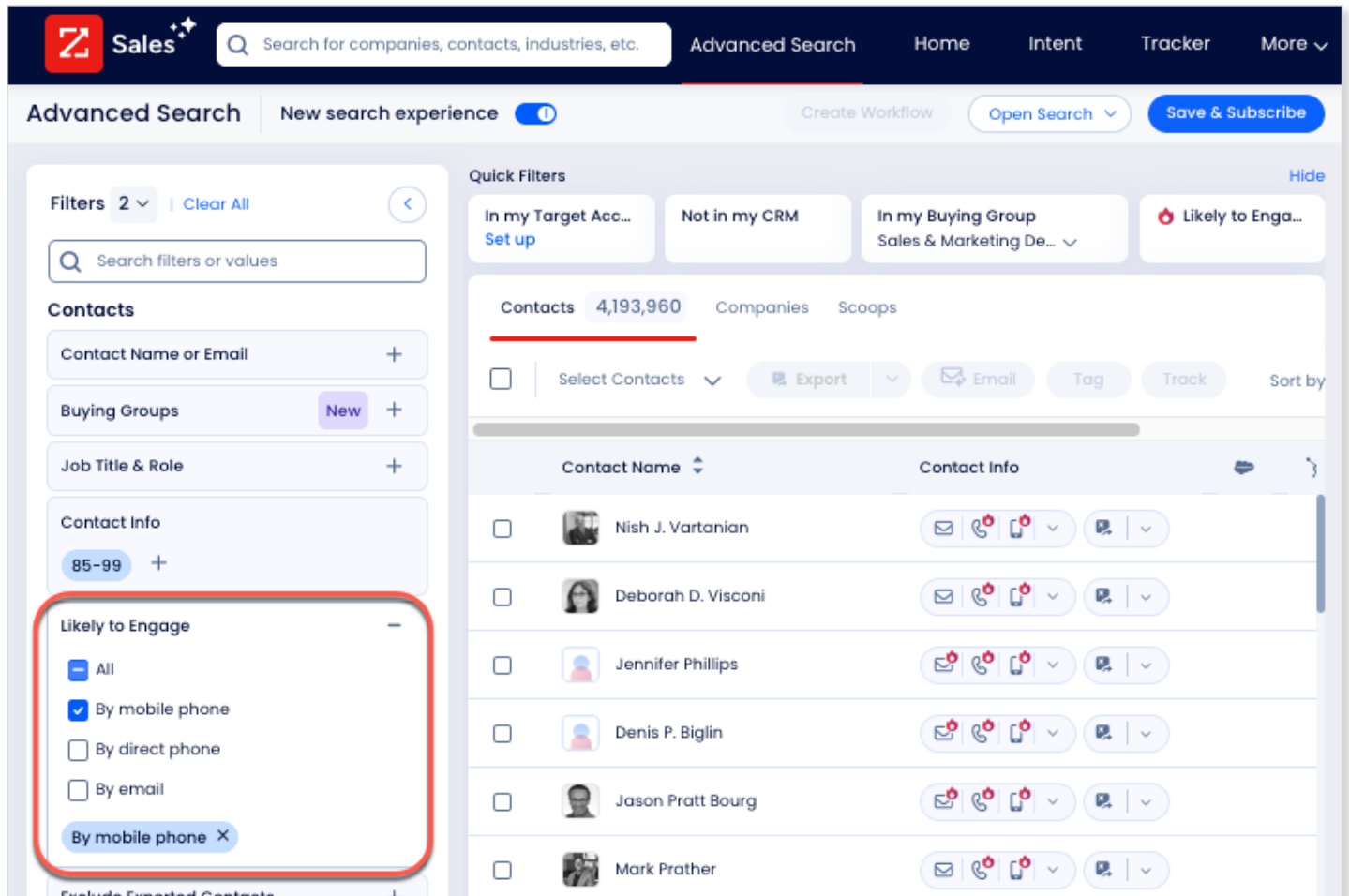


The screenshot shows the WebSights Analytics interface with the Time filter dropdown menu open. The menu options are:

- Past 24 Hours (selected)
- Past Week
- Past Month
- Past 3 Months
- Custom Range...

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**.



The screenshot displays the ZoomInfo Advanced Search interface. The top navigation bar includes the ZoomInfo logo, a search bar, and links for 'Advanced Search', 'Home', 'Intent', 'Tracker', and 'More'. Below the navigation bar, the 'Advanced Search' section is active, showing a 'New search experience' toggle and buttons for 'Create Workflow', 'Open Search', and 'Save & Subscribe'. The main content area is divided into two columns. The left column contains a 'Filters' sidebar with a search bar and several filter categories: 'Contacts', 'Buying Groups', 'Job Title & Role', and 'Contact Info'. The 'Likely to Engage' filter is expanded, showing options: 'All', 'By mobile phone' (checked), 'By direct phone', and 'By email'. A 'By mobile phone' filter tag is visible below the list. The right column shows 'Quick Filters' for 'In my Target Acc...', 'Not in my CRM', 'In my Buying Group', and 'Likely to Engage'. Below these, a summary bar indicates 'Contacts 4,193,960' and provides options for 'Export', 'Email', 'Tag', and 'Track'. A table of search results is displayed, with columns for 'Contact Name' and 'Contact Info'. The table lists several contacts, including Nish J. Vartanian, Deborah D. Visconi, Jennifer Phillips, Denis P. Biglin, Jason Pratt Bourg, and Mark Prather, each with associated contact icons and a dropdown menu.

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.

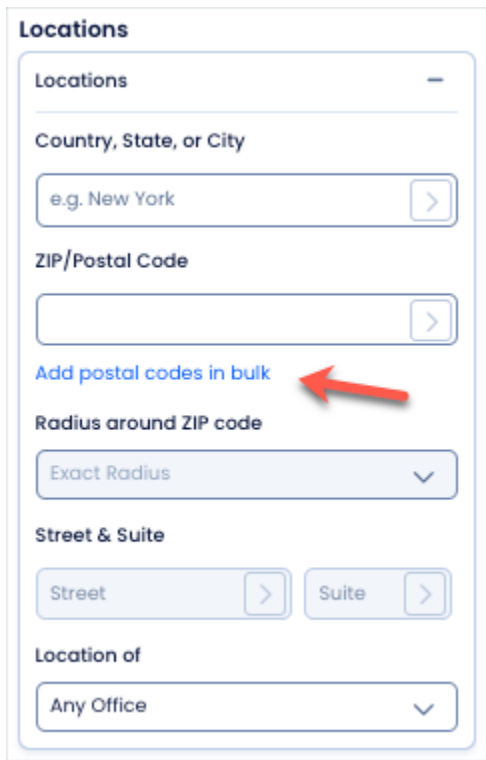
You can use bulk entry in the following Advanced Search categories:

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

How It Works

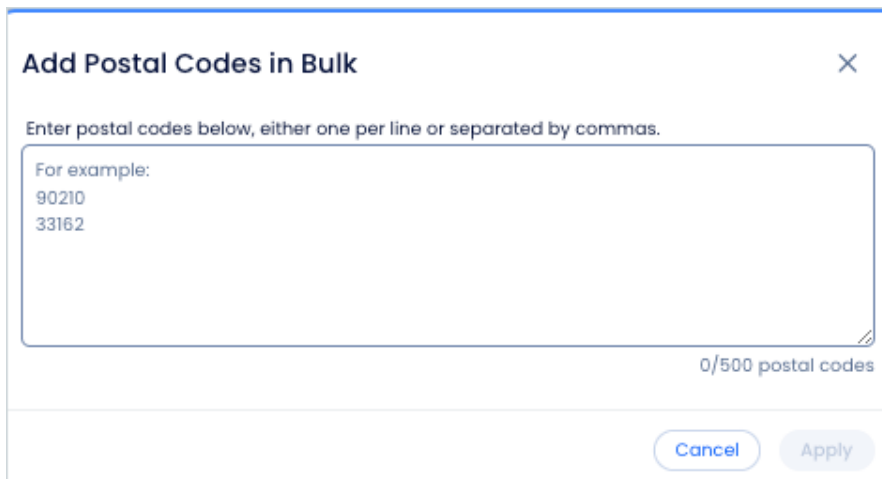
Bulk entry works the same for the supported Advanced Search categories. Here's an example of how you'd use bulk entry with the Locations filter.

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



The screenshot shows the 'Locations' filter panel. It includes a search box for 'Country, State, or City' with the placeholder 'e.g. New York', a 'ZIP/Postal Code' search box, a blue link 'Add postal codes in bulk' with a red arrow pointing to it, a 'Radius around ZIP code' dropdown menu set to 'Exact Radius', and 'Street & Suite' input fields. At the bottom, there is a 'Location of' dropdown menu set to 'Any Office'.

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



The screenshot shows a dialog box titled 'Add Postal Codes in Bulk'. It contains a text area with the instruction 'Enter postal codes below, either one per line or separated by commas.' and an example: 'For example: 90210 33162'. A counter at the bottom right indicates '0/500 postal codes'. At the bottom of the dialog are 'Cancel' and 'Apply' buttons.

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

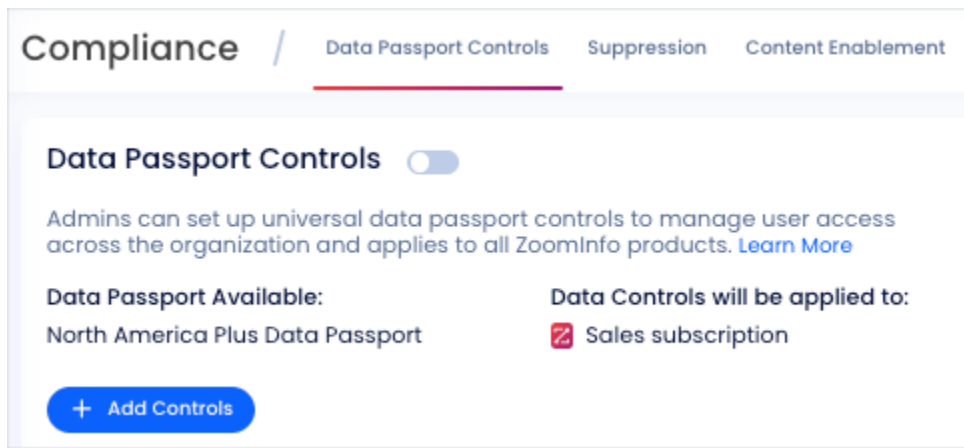
Who Gets It

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](#).

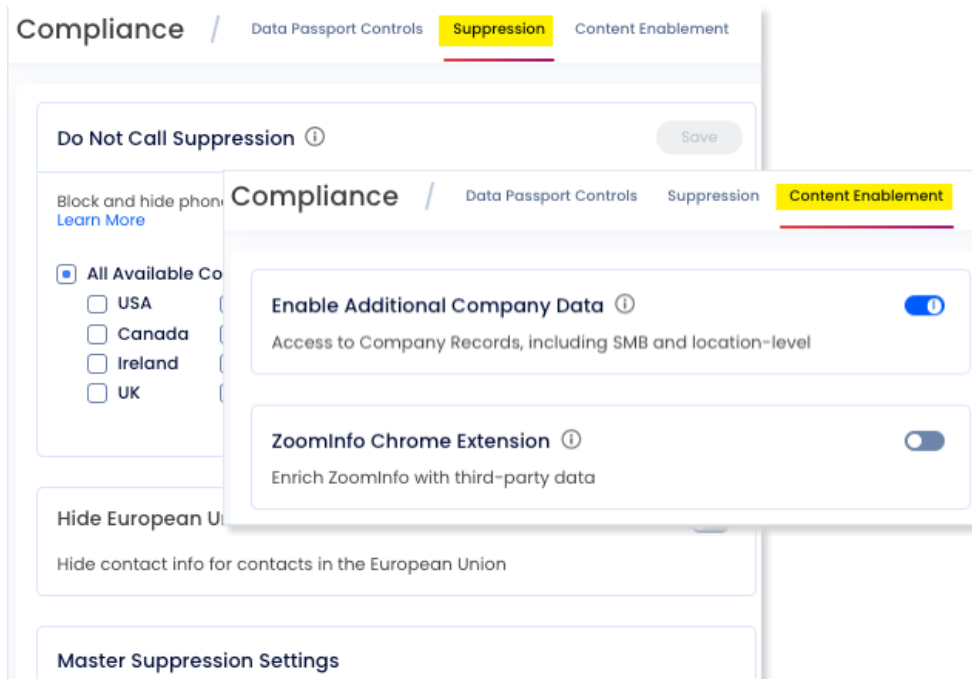
Limitations

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.

zoominfo Overview Invoices Billing Information Buy More ▾

Overview

⚠ Your Oct 12 is 22 days overdue. Please make payment. [Pay invoice](#)

Plan Active

Details Number: 00928127 Billing Frequency: Quarterly Start Date Jun, 12 2023 End Date Jun, 12 2024	Primary Contact Primary Contact: Chris Hemsworth Email: Chrishemsworth@microsoft.com Phone Direct: +1 (406) 555-0120
--	--

Plan 22 days overdue

Details Number: 00928128 Billing Frequency: Quarterly Start Date Jun, 12 2023 End Date Jun, 12 2024	Primary Contact Primary Contact: Chris Hemsworth Email: Chrishemsworth@microsoft.com Phone Direct: +1 (406) 555-0120	Next Payment Overdue Date: ⚠ Oct, 12 2023 Balance: ⚠ 2500.00 USD Invoice: 012346 Pay Now
--	--	---

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

zoominfo Overview Invoices Billing Information Payment Methods Buy More ▾ Contact Support ▾ ☰ VT

Overview

Plan Active

Details Number: 00899950 Start Date: Aug 18, 2023 End Date: Aug 17, 2024	Primary Contact Name: Vid J. Test Email: vjd.rao@zoominfo.com Phone Direct: +12124449399	Payment Status <input checked="" type="checkbox"/> Auto Payment VISA **** 4242 Change	Payment Due Date: Jul 30, 2024 Balance: USD 2,458.33 Invoice: 110000065798 Pay Now
--	--	--	---

Plan Active

Details Number: 00810159 Start Date: Aug 18, 2023 End Date: Aug 17, 2024	Primary Contact Name: Vid J. Test Email: vjd.rao@zoominfo.com Phone Direct: +12124449399	Payment Status <input type="checkbox"/> Auto Payment
--	--	--

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

Invoice #	Plan #	Quote	Invoice Date	Due Date	Invoice Amount	Balance Due	Billing Frequency	Status	Payment Receipt	Action
012346	00928127	Q-123456,Q...	May 30, 2024	Jun 30, 2024	USD 11,875.59	USD 3,000	Annual	Unpaid		Pay Now
012346	00928127	Q-123456,Q...	May 30, 2024	Jun 30, 2024	USD 10,600.42	USD 4,000	Annual	Unpaid		Pay Now
012346	00928129	Q-123456,Q...	Feb 30, 2024	Apr 30, 2024	USD 9,354.33	USD 5,400	Annual	Partly Paid		Pay Now
012346	00928130	Q-123456,Q...	Jan 30, 2024	Mar 15, 2024	USD 12,400.59	USD 6,000	Monthly	Paid		
012346	00928131	Q-123456,Q...	Dec 30, 2023	Feb 15, 2024	USD 6,700.45	USD 8,000	Monthly	Paid		

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

This information must be kept current to ensure your account continues to be active. To change address or billing contact info, please click [here](#) to contact AR or reach out directly to ar@zoominfo.com.

VAT/GST ID:

Billing Contact Phone:

Billing Contact Name:

Billing Contact Email:

Shipping address

Street Address: City:

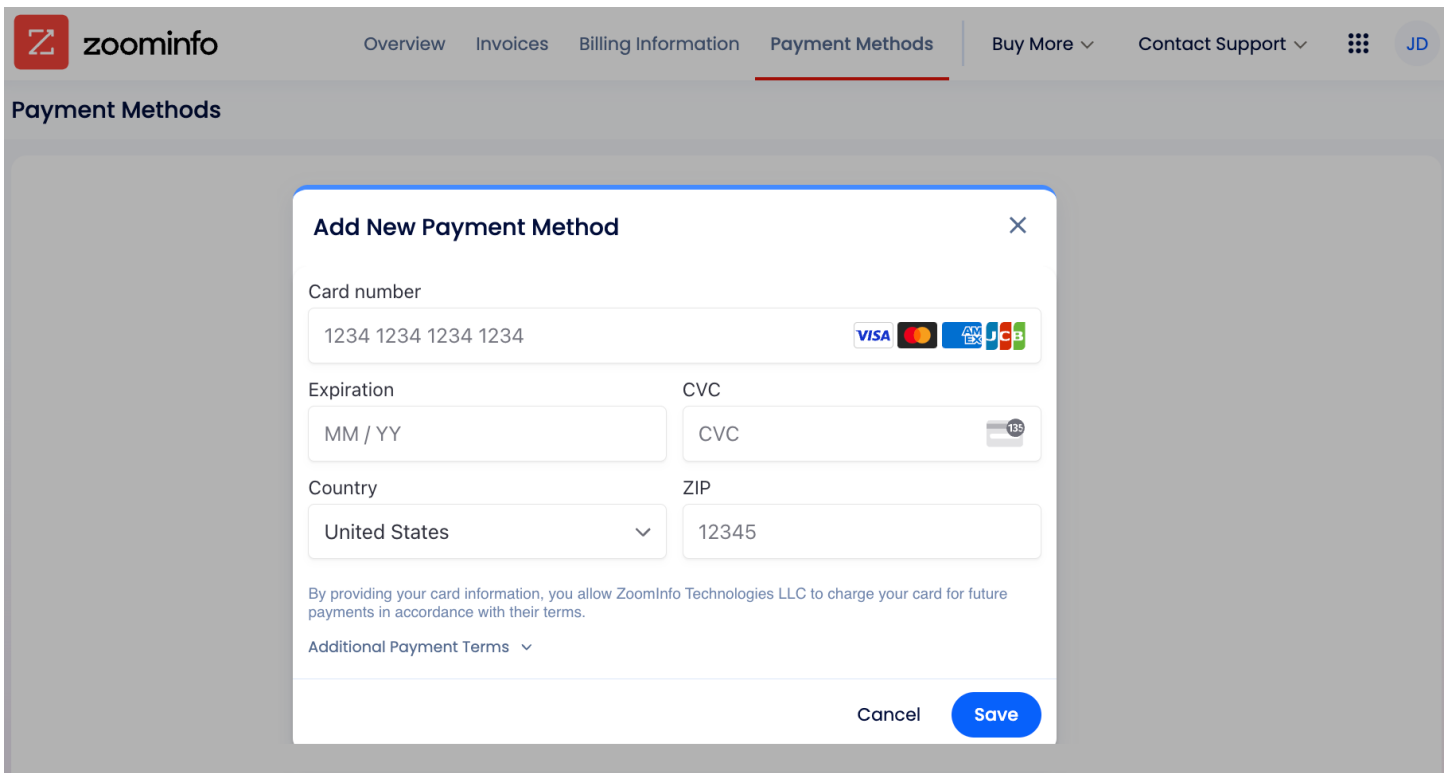
State: Country: Zip:

Billing address

Street Address: City:

State: Country: Zip:

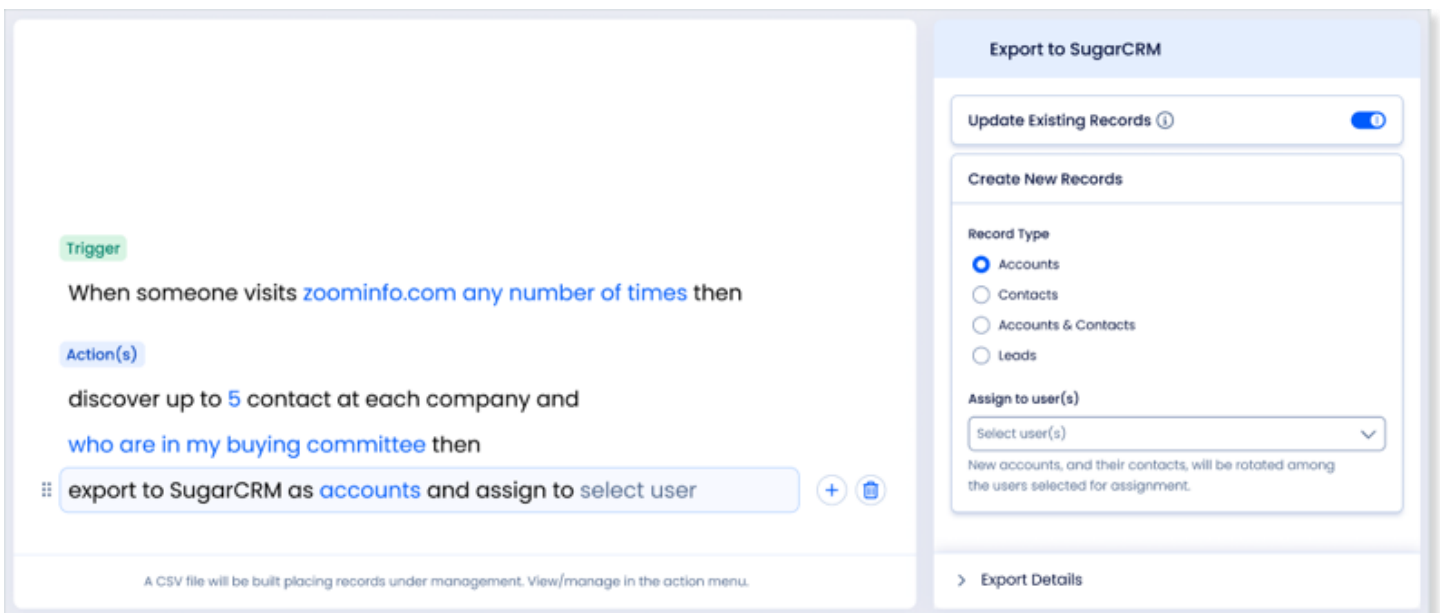
Click **Payment Methods** to see your payment methods or add a new method.



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 Gong 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

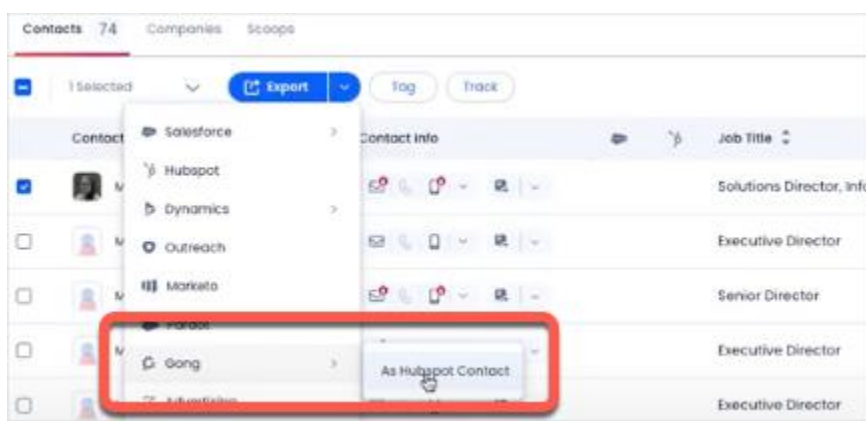
A ZoomInfo admin sets up the Gong Engage integration.

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.

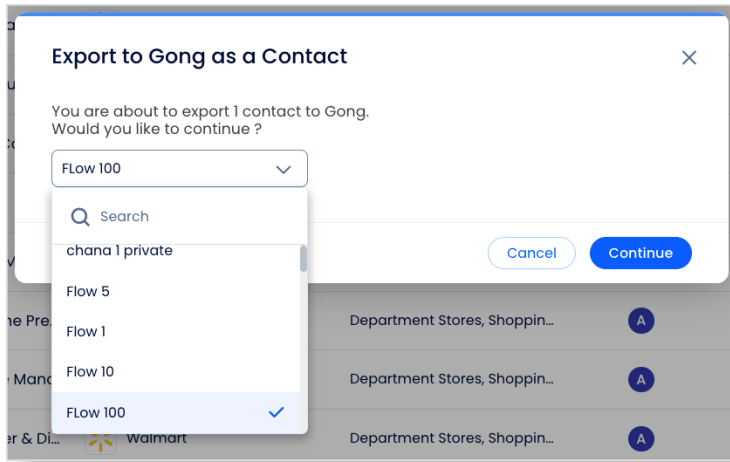
How It Works for Users

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.

Mar 18, 2024 ZoomInfo Sales Release

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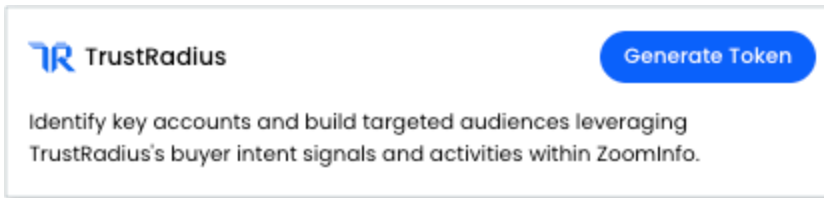
[Reset Two-Factor Authentication for Users in the Admin Portal](#)



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:

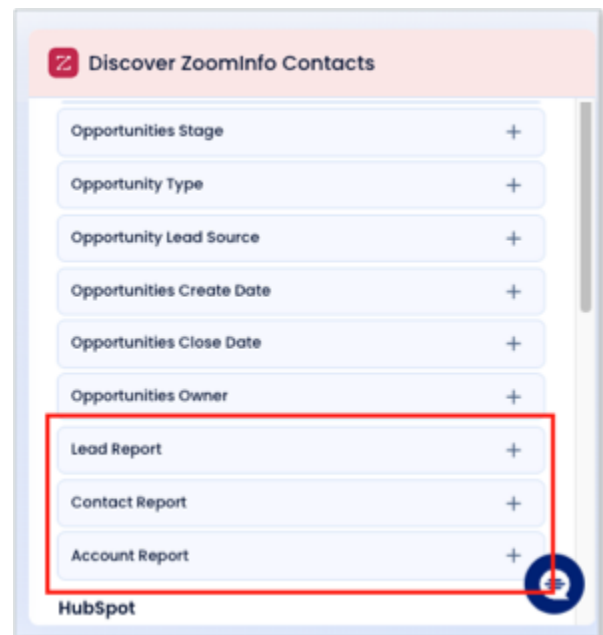
- ZoomInfo will automatically import TrustRadius buyer intent data nightly, ensuring timely insights.
- Your team can utilize TrustRadius buyer intent filters in Advanced Search along with ZoomInfo's extensive data to identify decision-makers at accounts showing active interest on trustradius.com, including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

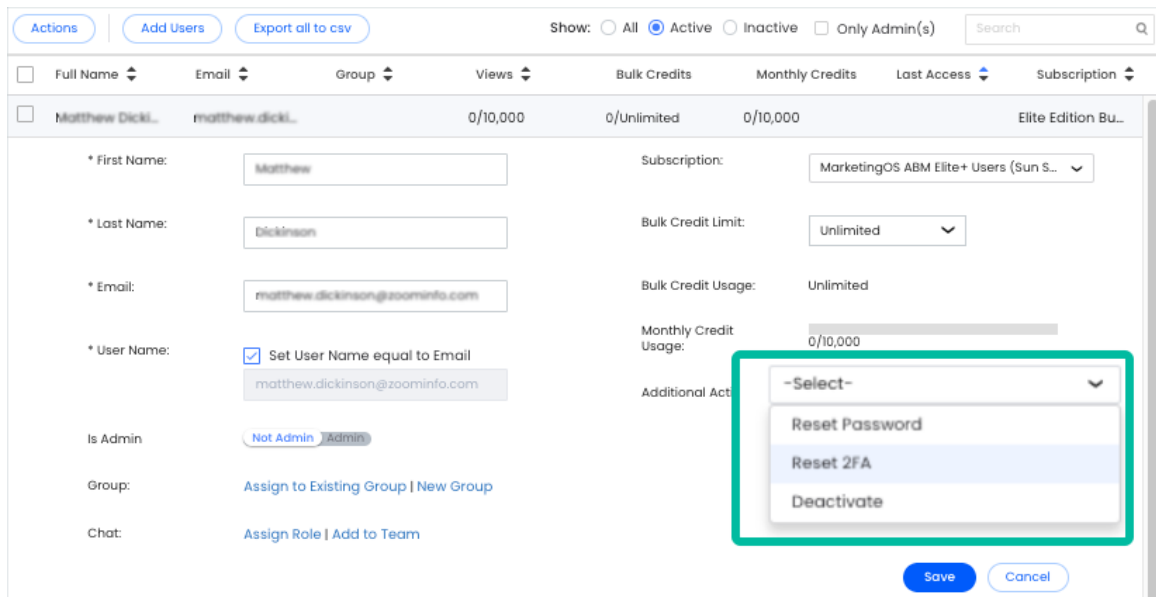


Reset Two-Factor Authentication for Users in the Admin Portal

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.

Feb 20, 2024 ZoomInfo Sales Release

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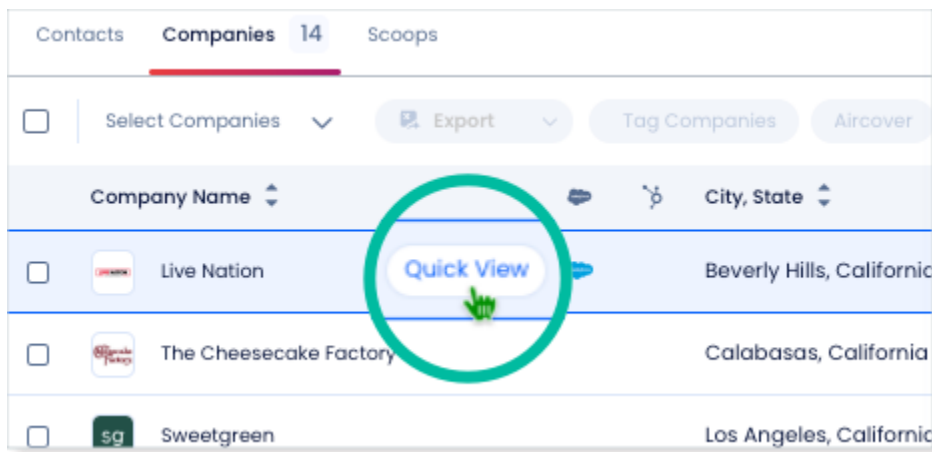
[Data Improvements](#)



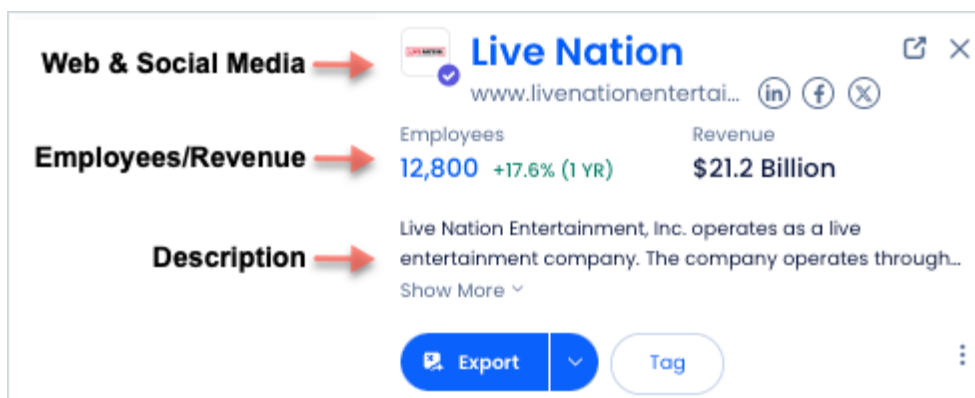
Improved Company Quick View Pane

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**.

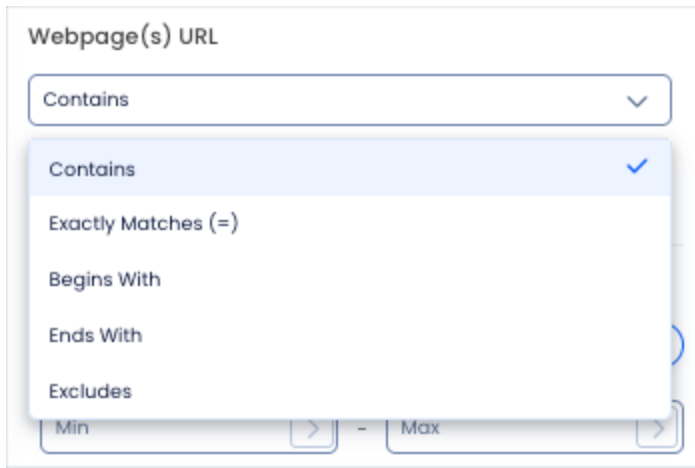
The screenshot displays the configuration for a 'WebSights' trigger within a workflow. The trigger is set to 'Scheduled Weekly' with a limit of 500 enrolled companies. The domain is 'zoominfo.com' and the URL filter is set to 'Contains'. The 'Number of Visits' is set to 'Page Views'. Two new filters are highlighted with red arrows: 'Minimum Session Duration' (set to 'Seconds' and 'Minimum') and 'Page Rank' (set to 'Select Page Rank').

Trigger
When someone visits [zoominfo.com](#) on any page from then

Action(s)
export to Salesforce and [update existing records](#) and create new records as [Accounts and Contacts](#) and [do not add to campaign](#) and assign to [select user](#) then discover [up to 20](#) ZoomInfo contacts per company

WebSights
Frequency: Scheduled Weekly
Limit Enrolled Companies: 500 (Max 3,500)
Domain Name: zoominfo.com
Webpage(s) URL: Contains
Type in URL:
Number of Visits: Unique Visits / Page Views
Min: > - Max: >
Minimum Session Duration: Seconds - Minimum
Page Rank: Select Page Rank

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.

Jan 17, 2024 ZoomInfo Sales Release

Highlights

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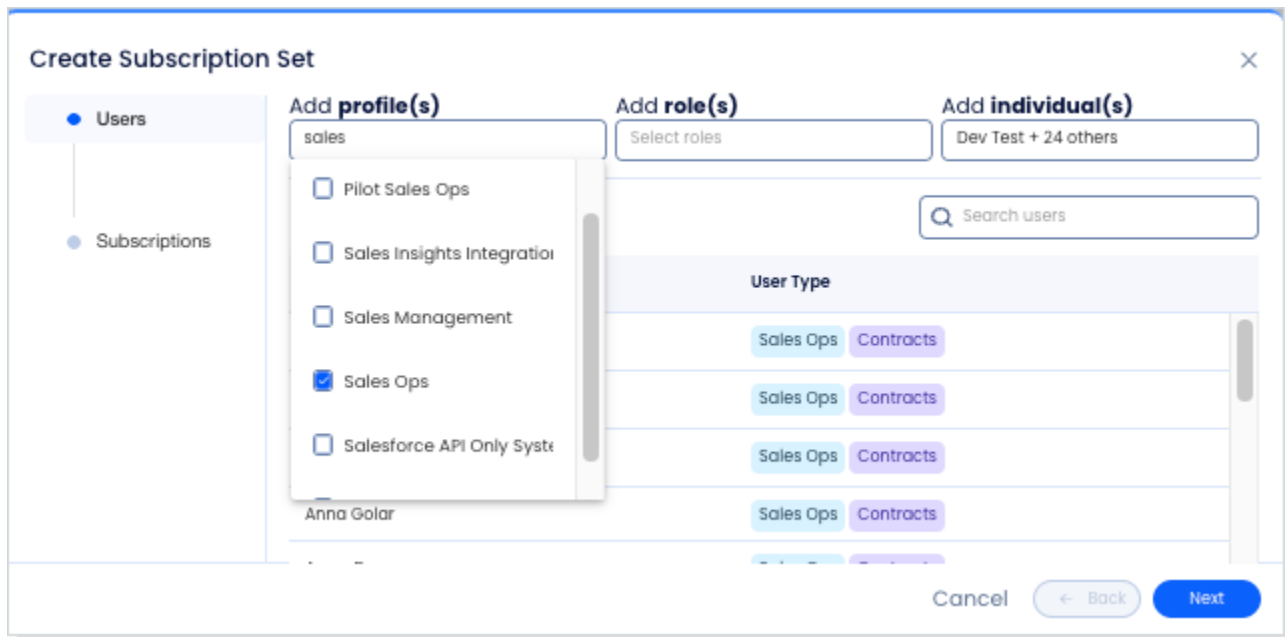
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CRM Auto Provisioning (Salesforce)

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.

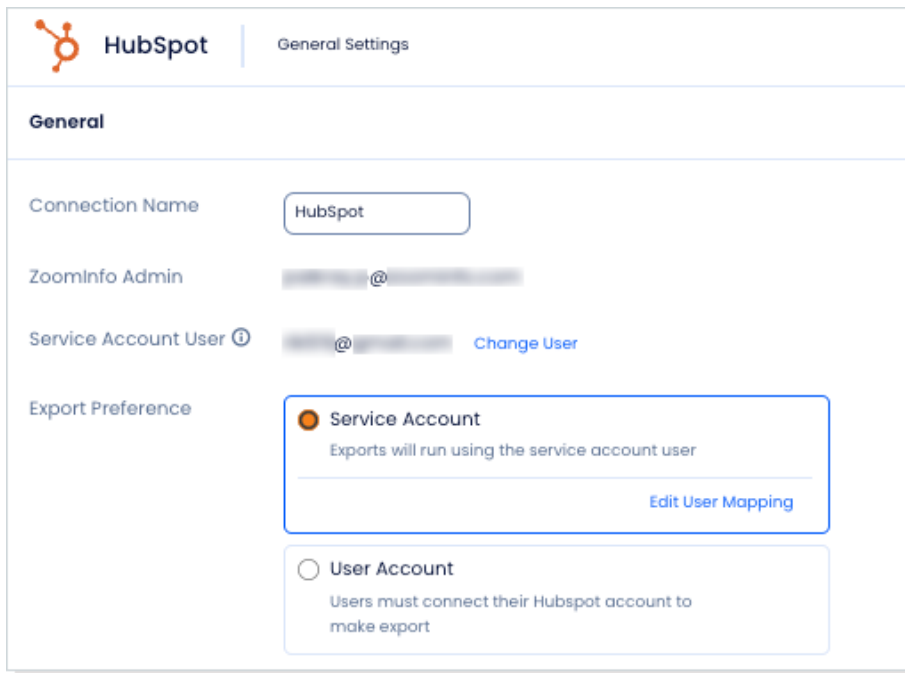


See the [ZoomInfo CRM Auto Provisioning Implementation Guide](#) for how to set up auto provisioning using your connected Salesforce instance to manage your users and product subscriptions.

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.

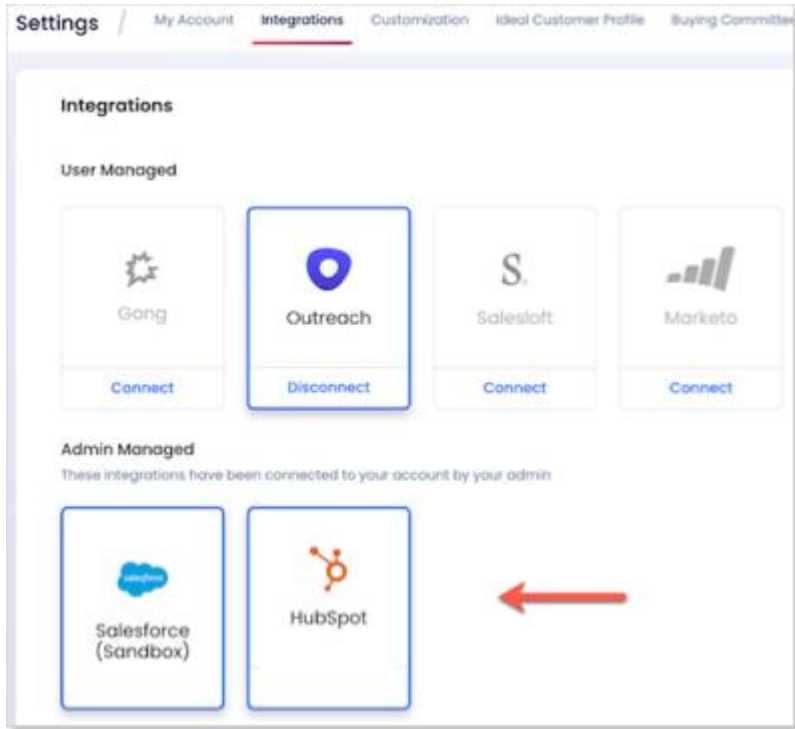


How it works (for new customers): The service account option is the default configuration when setting up the configuration. Admins can choose to automatically connect all their users to HubSpot or to have their users manually connect with their own usernames and passwords.

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.

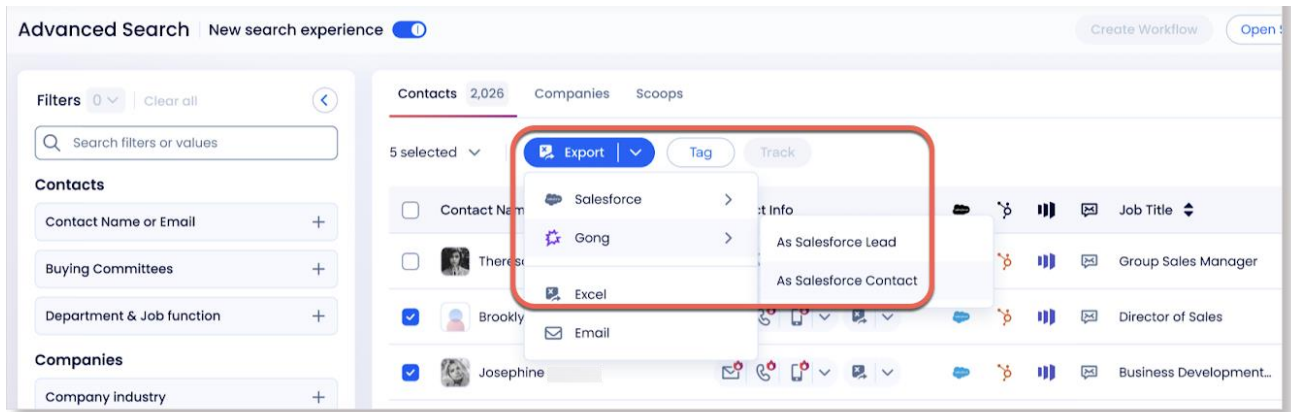
Previously, importing ZoomInfo Sales data into Gong involved exporting a CSV from ZoomInfo Sales and manually uploading it into Gong. This direct integration greatly reduces time and effort.

Integration setup (admins):

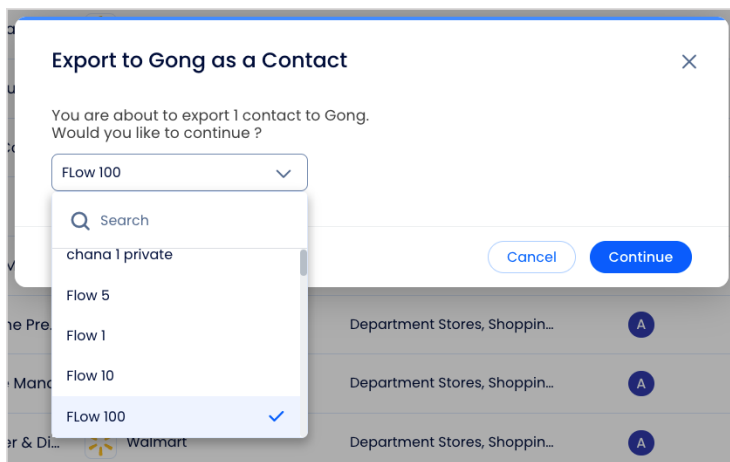
Admins managing the ZoomInfo Sales and Salesforce integrations can find details on setting up the Gong integration in the [Gong Engage Integration Guide](#).

How it works (for users):

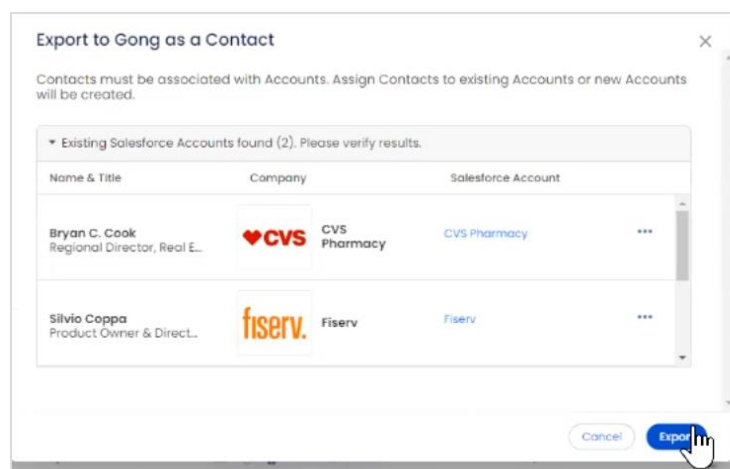
1. In ZoomInfo Sales, select contacts for export.
2. From the **Export** dropdown, select **Gong**.
3. Select **As Salesforce Lead** or **As Salesforce Contact**.



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

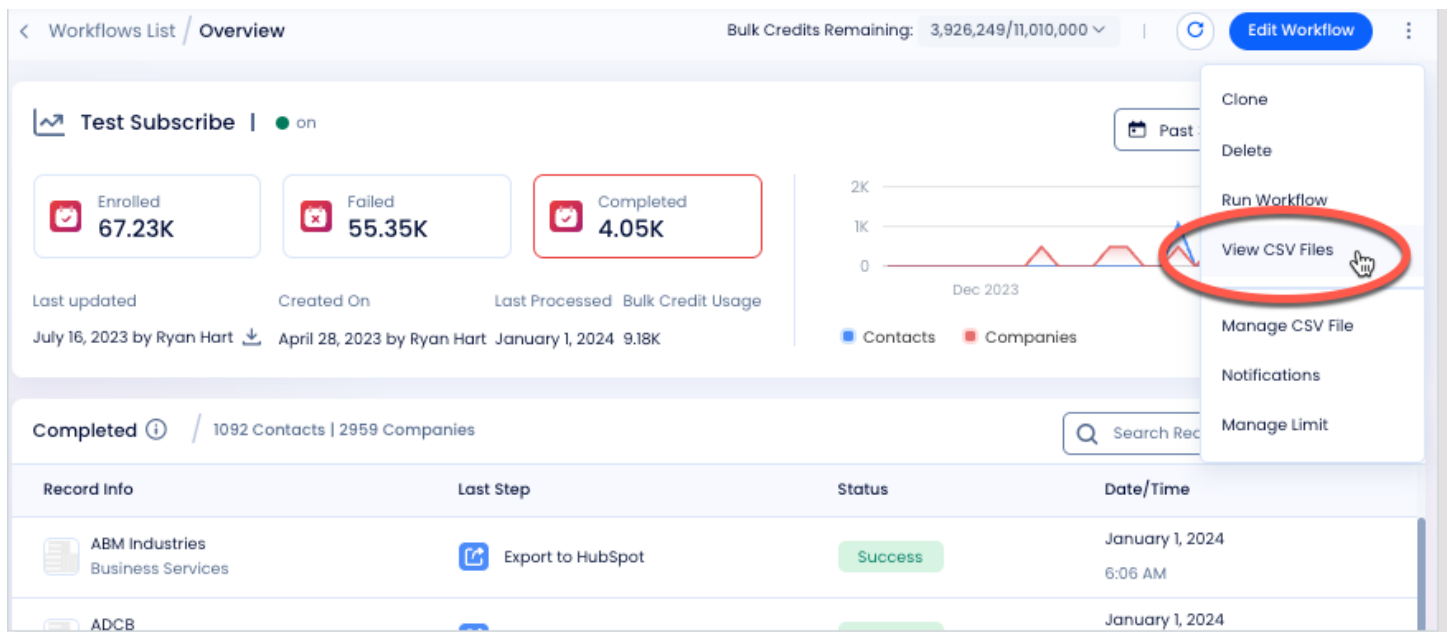
We've enhanced the calculation of our In-Market Score (IMS) to include advertising signals - specifically, **impression data** and **click data** for ads:

- **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.



The screenshot displays the 'Workflows List / Overview' page. At the top, it shows 'Bulk Credits Remaining: 3,926,249/11,010,000' and an 'Edit Workflow' button. The main section features a 'Test Subscribe' workflow with a status of 'on'. It includes three summary cards: 'Enrolled 67.23K', 'Failed 55.35K', and 'Completed 4.05K'. A line chart on the right shows activity for 'Contacts' and 'Companies' in 'Dec 2023'. A dropdown menu is open, with 'View CSV Files' highlighted by a red circle. Below the summary, it shows 'Completed 1092 Contacts | 2959 Companies' and a search bar. A table at the bottom lists workflow runs with columns for 'Record Info', 'Last Step', 'Status', and 'Date/Time'. The first row shows 'ABM Industries Business Services' with the step 'Export to HubSpot' and a 'Success' status on 'January 1, 2024' at '6:06 AM'.

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

Test Subscribe | on Past 30 Days

CSV Files of "Test Subscribe"

25 Files

Created	Companies Generated	Contacts Generated	Action
Jan 1, 2024	500	6,357	Download CSV File
Dec 30, 2023	500	6,391	Download CSV File
Dec 28, 2023	500	6,606	Download CSV File
Dec 26, 2023	500	6,842	Download CSV File
Dec 25, 2023	500	7,481	Download CSV File
Dec 24, 2023	500	6,724	Download CSV File

[Done](#)

Export to HubSpot Success January 1, 2024











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

Name/Status	Trigger	Enrolled	Failed	Completed	Credits	Last Updated	Created	Actions
Reg streaming web with ... ● on	WebSights Immediate	2.31M	1.06K	2.31M	0	AK Jan 9, 2024	AZ Jan 9, 2024	...
Streaming Websights - ... ● off	WebSights Immediate	1.71M	70	1.71M	121.19K	NL Jan 9, 2024		<ul style="list-style-type: none"> Edit Clone Delete View CSV Files Manage CSV File Notifications Manage Limit
test wf name 2 ● on	WebSights Immediate	1.14M	970	1.14M	80.11K	AK Nov 29, 2023		
Site Visit Targeting - Thu ... ● on	WebSights Immediate	1.14M	969	1.14M	0	RH Aug 2, 2023		
Site Visit Targeting - Thu ... ● on	WebSights Immediate	1.14M	965	1.14M	0	JF Oct 31, 2023		
subs test ● on	WebSights Immediate	1.14M	934	1.14M	79.73K	JF Nov 21, 2023		



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


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.

 Site Visit Targeting - Mon Aug 21 2023 21:06:05 GMT+0530 |  on

 Enrolled
1.14M

 Failed
1.22K

 Completed
1.14M

Last updated	Created On	Last Processed	Bulk Credit Usage
August 21, 2023 by Deveshwar D 	August 21, 2023 by Deveshwar D	January 9, 2024	4.52K 

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**.

The screenshot shows the 'Workflow Overview' page for 'Site Visit Targeting - Mon Aug 21 2023 21:0...'. The page displays workflow statistics: Enrolled (1.14M), Failed (1.22K), and Completed (1.14M). A graph shows bulk credit usage for 'Contacts' and 'Companies' over 'Dec 2023'. A dropdown menu is open, with 'Manage Limit' highlighted by a red circle. Below the statistics, a table shows record information for 'Completed' records.

Record Info	Last Step	Status	Date/Time
Ian Cuthbertson Division Vice President, Resources	Discover ZoomInfo Contacts	Success	January 9, 2024 2:23 PM
Angela Tang Vice President, International Business	Discover ZoomInfo Contacts	Success	January 9, 2024

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

The screenshot shows the 'Advanced Settings' dialog for 'Manage Limit'. The dialog is titled 'Advanced Settings' and has a close button (X) in the top right corner. It contains the following settings:

- Manage CSV File**: The workflow will enroll records until it reaches the limit and will resume as soon as rolling usage is less than the rolling limit.
- Notifications**: No limit, Limit bulk credits usage
- Credit Limit**:
- Time Period**:

Below the settings, there is a status message: **You have used 4,518 bulk credits of the 5,000 limit in the past 30 days**. At the bottom of the dialog, there are 'Cancel' and 'Apply' buttons.

- 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.

Limit bulk credits usage

Credit Limit: 4,000

Time Period: 30 Days

⚠ You have reached the limit of 4,000 bulk credits in the last 30 days

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

Limit bulk credits usage

Credit Limit: 5,000

Time Period: 30 Days

ℹ You have used 4,518 bulk credits of the 5,000 limit in the past 30 days

- When done, click **Apply**.

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

Workflows List / Overview			
Site Visit Targeting - Mon Aug 21 2023 21:06:05 GMT+0530 on			
Enrolled 1.14M	Failed 1.22K	Completed 1.14M	
Last updated January 9, 2024 by John Doherty	Created On August 21, 2023 by Deveshwar D	Last Processed January 9, 2024	Bulk Credit Usage 4.52K Limit set

- 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.