

# 2024 ZoomInfo Sales Release Notes

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

## Current Release

[Aug 19, 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

[Jul 16, 2024](#)

[Jun 18, 2024](#)

[May 21, 2024](#)

[Apr 15, 2024](#)

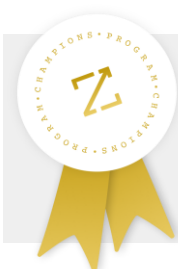
[Mar 18, 2024](#)

[Feb 20, 2024](#)

[Jan 17, 2024](#)

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

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



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# Aug 19, 2024 ZoomInfo Sales Release

## Highlights

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[Mobile App: Show WebSights Data for Companies](#)

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## zoominfo Copilot<sup>+</sup>

### 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](#)



## Workflows: Export to Gong Engage Flows

We already support the ability for users to make manual exports to Gong Engage Flows for organizations that use Salesforce or HubSpot. With this release, Workflows users can now automate exporting to a Gong Engage Flow by selecting Gong Engage as an export step.

### Set Up the Integration

The Gong integration also requires an active Salesforce or HubSpot integration. For full details, see the [Gong Integration Guide](#).

### How It Works for Users

Workflow users can choose to export as a Salesforce contact or lead, or a HubSpot contact, assign to a user, and select the Gong Flow.

The screenshot displays a workflow editor for 'Innovation companies list'. The workflow is configured with a trigger and two actions. The right-hand panel, titled 'Export to Gong', contains the following settings:

- Record Type:** Radio buttons for 'Salesforce Contacts', 'Salesforce Leads' (selected), and 'HubSpot Contacts'.
- Assign to user(s):** A dropdown menu labeled 'Select user(s)'.
- Gong Flow:** A dropdown menu labeled 'Select flow'.

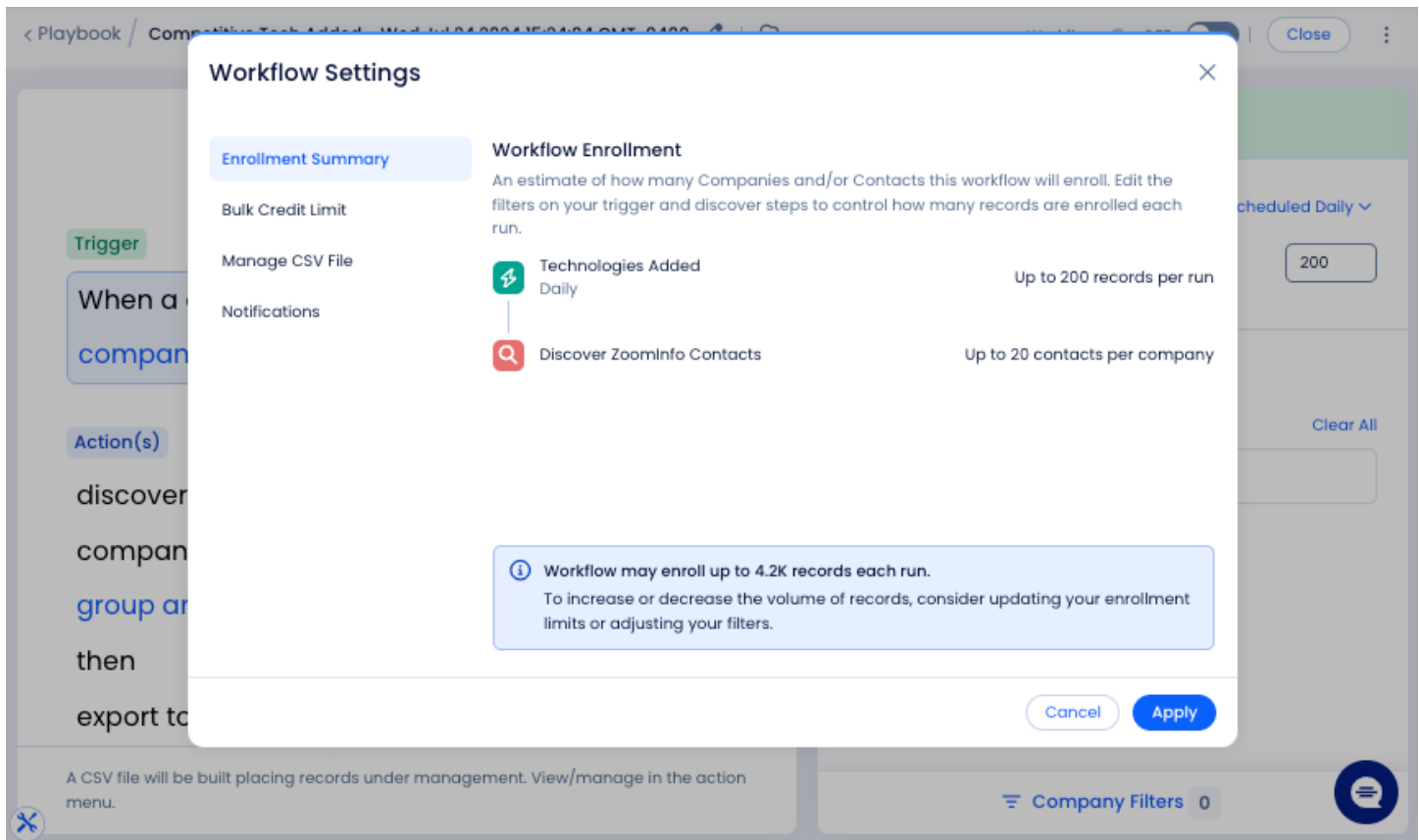
Below the 'Assign to user(s)' dropdown, a note states: 'New accounts, and their contacts, will be related among the users selected for assignment.'

The workflow steps are as follows:

- Trigger:** When someone visits `zoominfo.com` any number of times then
- Action(s):**
  - discover up to 5 contact at each company and
  - who are in my buying committee then
  - export to Gong select record type and assign to select user and
  - add to select Gong flow

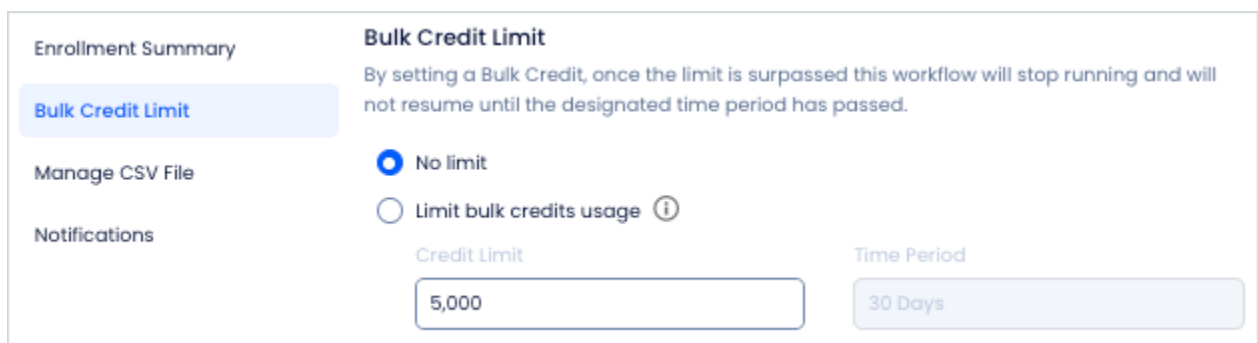
## Workflows: Validate Before Enabling

When you attempt to enable a Workflow, a new popup displays to help you understand the number of records a Workflow could potentially export to ensure full awareness of credits that may be spent for each run for the Workflow.



The popup also includes the following tabs to help you make some key adjustments to your Workflow before enabling it:

- **Bulk Credit Limit:** Provides an opportunity to to set a bulk credit limit for this Workflow.



- **Manage CSV File:** Lets you choose to create a CSV file for each Workflow run. Enabling CSV file creation will consume bulk data credits.

Enrollment Summary

**Create a CSV File** ☒

Bulk Credit Limit

Managing CSV File

Notifications

Activating this setting will create a CSV File for each workflow run. This action will consume bulk data credits. You can view this list from the action menu of each workflow.

- **Notifications:** Lets you configure notifications for other users in your organization when a Workflow is run. Only users with Workflows permissions can be subscribed to notifications.

Enrollment Summary

**JD John Doherty (You)** Weekly Daily **None**

Bulk Credit Limit

Managing CSV File

**Notifications**

Add Users

Search

Only users with Workflows permissions can be subscribed to notifications.

If you're satisfied with the Workflow configuration, simply click Enable Workflow.

Cancel Enable Workflow

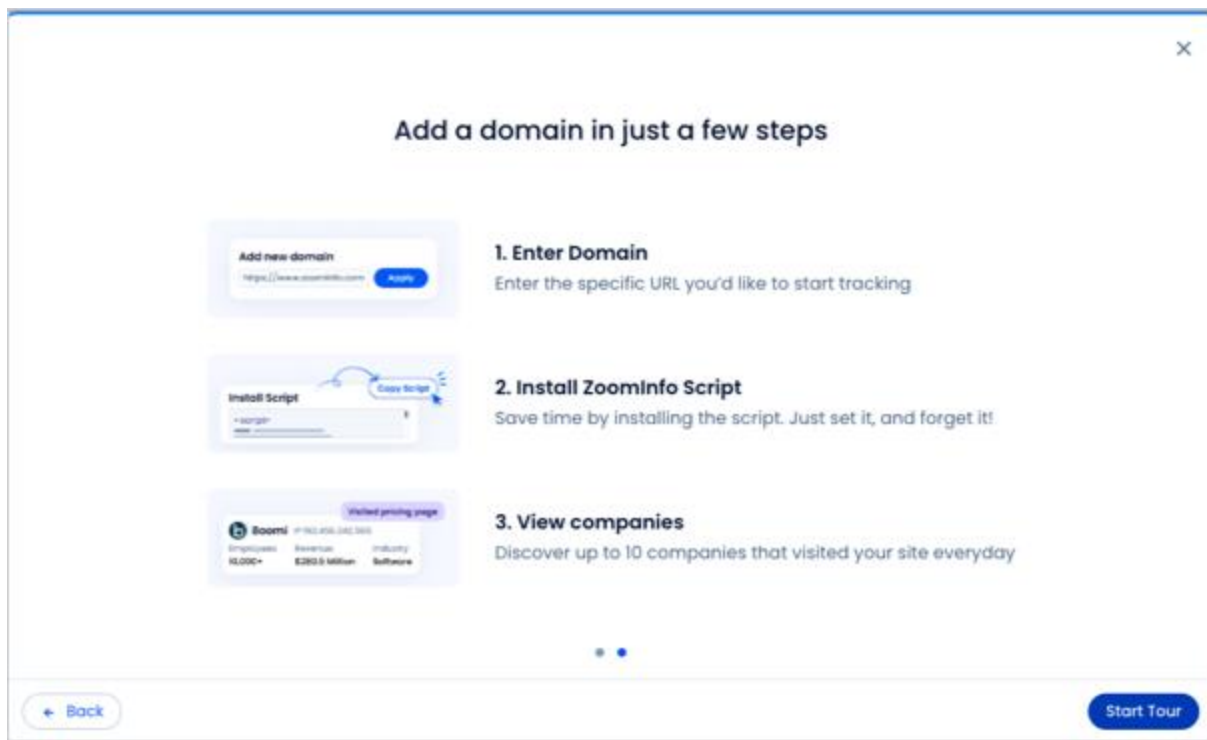
## WebSights: Web Visits for Basic, Pro Lite+ and Pro+ Packages

We've made it simple for organizations with Basic, Pro Lite+, Pro+ packages to try our Web Visits feature for free. Web Visits is a limited version of our full WebSights feature available in our higher ZoomInfo Sales packages (Advanced+ and Elite+).

Web Visits can turn page views into pipeline by identifying the companies associated with people visiting your site, allowing you to focus your outreach efforts on visitors who are primed to buy.

### How It Works

To enable the Web Visits experience, you simply provide your domain and install the ZoomInfo Script on your website.



Your organization's users will begin to see real traffic of companies visiting the website in the Web Visits tab - up to 10 companies per day.

Web Visits

Play with sample data

12 Companies

453 Total Unique Visits

735 Total Page Views

1.623 Avg. Pages Per Visit

Open in Search

Export

Tag Companies

Company Name	Last Visit	Unique Visits	Page Views	Avg. Session Duration	Primary Industry	Revenue	Employees
 Morgan Stanley	Aug 13, 2024 5:08 PM	271	332	0:00:49	Finance	\$50.2B	82,000
 Mondelez International	Aug 13, 2024 5:08 PM	184	253	0:07:42	Manufacturing	\$34.1M	91,000
 Southwest Airlines	Aug 13, 2024 5:08 PM	16	30	0:00:32	Transportation	\$23.8B	66,656
 Mercer	Aug 13, 2024 5:08 PM	15	25	0:13:53	Business Services	\$4.6B	25,000
 University of Southern California	Aug 13, 2024 5:08 PM	13	21	0:01:01	Education	\$3.4B	30,095
 Carnegie Mellon University	Aug 13, 2024 5:08 PM	5	5	0:02:37	Education	\$1.3B	8,094
 Meltwater Group	Aug 13, 2024 5:08 PM	5	23	1:01:30	Software	\$462.1M	2,200
 Lake Huron Medical Center	Aug 13, 2024 5:08 PM	4	18	2:03:38	Hospitals & Physicians Clinics	\$71.9M	490
 Star Tribune	Aug 13, 2024 5:08 PM	4	15	0:12:00	Media & Internet	\$223.9M	1,084
 Cresco	Aug 13, 2024 5:08 PM	3	6	-	Real Estate	\$1B	1,000
 Jellyfish Technologies	Aug 13, 2024 5:08 PM	2	2	0:02:30	Business Services	\$10.1M	100

Want to see here companies that visited **your own website**? check it out for free here!

yourdomain.com

Add Your Domain

Want to see more? Initiate an upgrade to a package that includes the full version of WebSights.

## WebSights: Deletion Safety Check for Workflows

Many organizations configure Workflows that are triggered by WebSights data about companies visiting your site to automate actions based on this information. To better ensure no disruptions occur to your automation, we've instituted a deletion safety check for WebSights configurations.

### How It Works

If a user attempts to delete a WebSights domain that is connected to Workflow, we now provide an alert that shows the affected Workflows and the user that owns it. This helps foster communication on adjustments that need to be made to ensure your automations continue as expected.

## Integrate with Groove, a Clari Company

Organizations with both ZoomInfo Sales and Salesforce can now integrate with Groove, a Clari Company. This will allow ZoomInfo Sales users to add contacts from ZoomInfo Sales to Groove engagement flows.

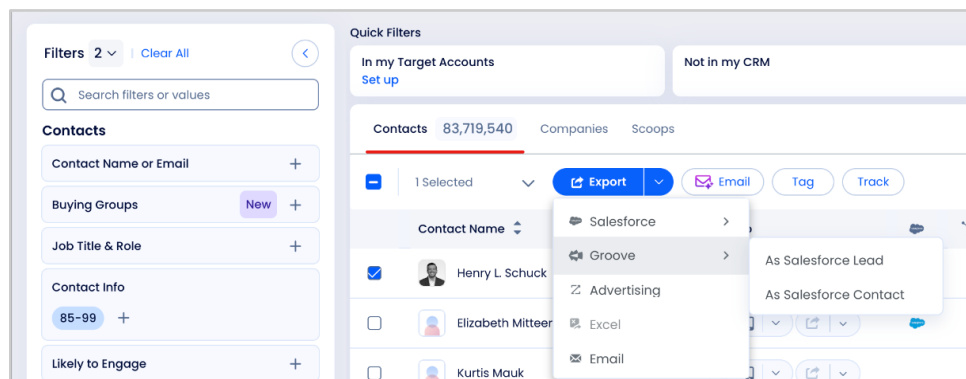
- Identify the right buyer and initiate automated prospecting and engagement flows without leaving ZoomInfo.
- Eliminate manual work required to upload contacts to Clari Groove and empower sellers to qualify more deals, faster.

### Set Up the Integration

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

### How It Works for Users

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



4. Export to a specific Groove flow in your Groove instance then click **Continue**.
  - You may be asked to associate the contacts with an existing account in Salesforce.
  - If an account for your selected contacts does not exist in Salesforce, a new account will be created in your Salesforce instance.
5. Click **Export**. Once exported, you will see the contacts in the Groove flow.

## Integrate With Docusign

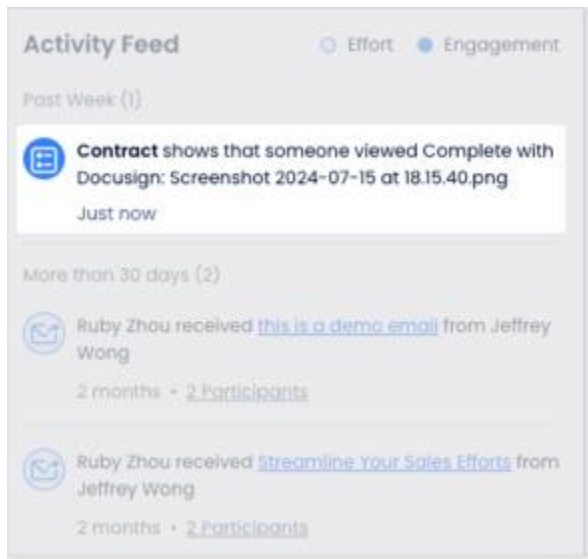
If your organization uses Docusign, you can enhance your workflow by integrating it with ZoomInfo Sales. This integration allows you to monitor Docusign document activities—such as sharing, delivery, signing, and declines—directly within ZoomInfo Sales, enabling users to conduct searches based on these specific actions.

### Set Up the Integration

Admins managing the ZoomInfo integrations can find details on setting up the integration in the [Docusign Integration Guide](#).

### How It Works for Users

When Docusign content is shared, delivered, signed, and declined, it will surface in the Activity Feed and in notifications






## Improved Experience for Viewing Employment History

We've updated how we present **Employment History** for contacts. including:


- Grouped positions under the same employer
- Total duration at each employer
- Duration for each position
- Job location for each position
- Visibility into contacts working multiple positions at the same time

You can find **Employment History** on both the profile page and the Quick View side pane.

### Employment History

 **SmartSheet**  
6 yrs 6 mos

- Vice President, Product Management**  
Apr 2021 – Present · 3 yrs 3 mos  
Washington, D.C.
- Director, Product Management**  
Apr 2020 – Apr 2021 · 1 yr  
Greater New York Area
- Sr. Product Manager, Product Management**  
Mar 2019 – Apr 2020 · 1 yr 1 mo  
Greater New York Area
- Product Manager II, Product Management**  
Jan 2018 – Mar 2019 · 1 yr 3 mos  
Greater New York Area

 **Microsoft**  
1 yr 9 mos

- Sr. Product Manager, Product**  
Nov 2016 – Jul 2017 · 9 mos  
Greater New York Area
- Product Manager, Product**  
Nov 2015 – Nov 2016 · 1 yr  
Greater New York Area

Show less ^

## Google Chrome Extension: Export to Gong Engage Flows

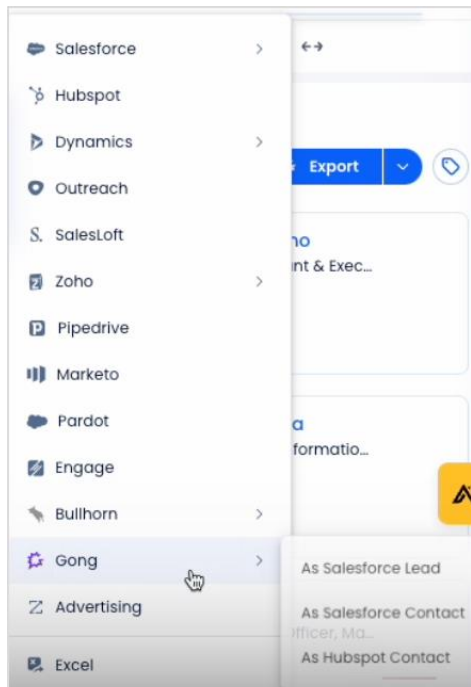
In our [January release](#), we introduced the Gong Engage integration for organizations with Salesforce or HubSpot, enabling users to export to Gong Engage flows from our web app. With this release, the Gong Engage integration now supports exporting to Gong Engage flows from the ZoomInfo Chrome Extension.

### Set Up the Integration

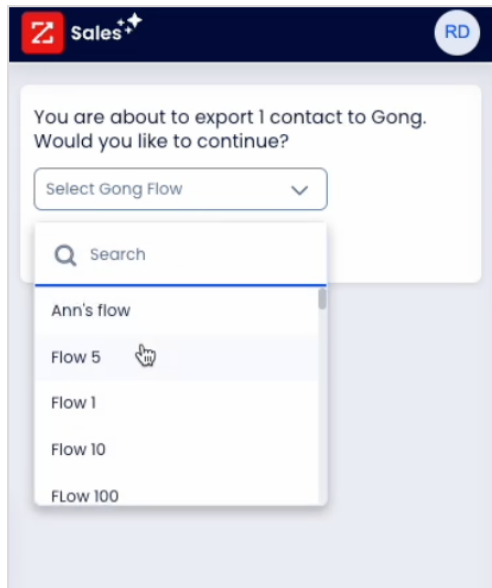
Admins managing the ZoomInfo Sales and Salesforce or HubSpot integrations can find details on setting up the Gong integration in the [Gong Integration Guide](#).

### How It Works For Users

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

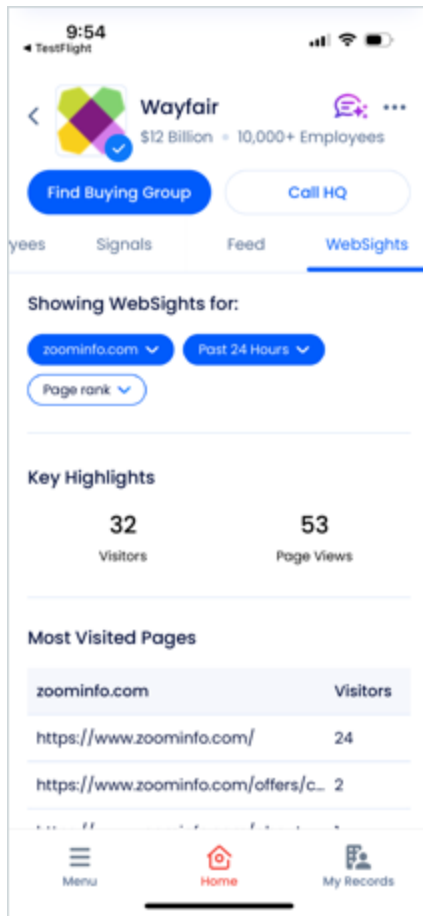


4. Export to a specific **Gong Engage flow** in your Gong instance then click **Continue**.



5. Click **Export**.
6. Once exported, you will see the contacts or leads in your CRM and in the Gong Engage flow.

## Mobile App: Show WebSights Data for Companies



Users of the ZoomInfo Mobile App now gain access to WebSights data within company profiles, equipping them with insights about companies that visit certain pages on their website.

For sellers on-the-go, having access to this information can drive more timely engagement with potential leads at these companies.

## 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

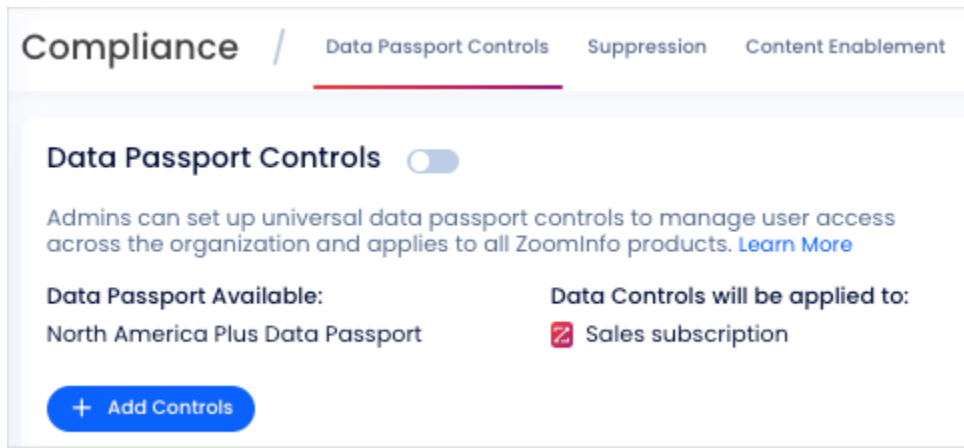
Organizations with the *ZoomInfo Sales Elite+* package.

## 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.

Compliance / Data Passport Controls **Suppression** Content Enablement

**Do Not Call Suppression** ⓘ Save

Block and hide phone numbers from your database. [Learn More](#)

☒ All Available Countries

- ☐ USA
- ☐ Canada
- ☐ Ireland
- ☐ UK

**Hide European Union**

Hide contact info for contacts in the European Union

**Master Suppression Settings**

Compliance / Data Passport Controls Suppression **Content Enablement**

**Enable Additional Company Data** ⓘ Toggle On

Access to Company Records, including SMB and location-level

**ZoomInfo Chrome Extension** ⓘ Toggle On

Enrich ZoomInfo with third-party data



# Jul 16, 2024 ZoomInfo Sales Release

## Highlights

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[Salesloft Account Ownership Update](#)

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

zoominfo Copilot

Have you checked out ZoomInfo Copilot?

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[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.

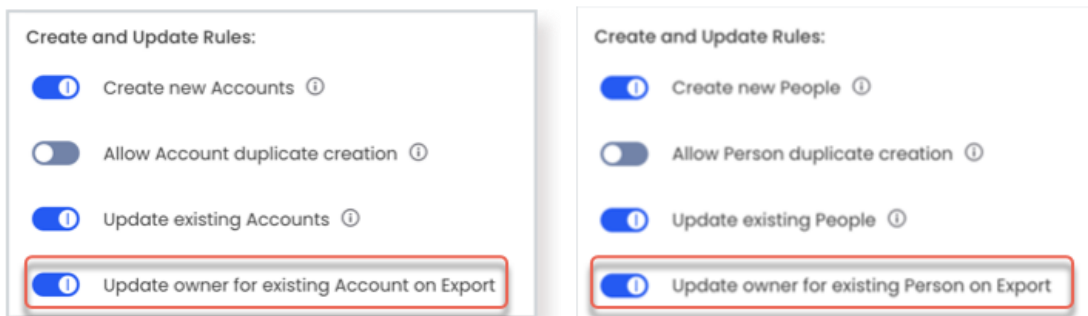
**How It Works (for Users):** If your org is connected to SugarCRM **using the Service Account option**, users and other admins will not see an option to disconnect themselves from the integration when they navigate to their integration settings (**initials > Settings > Integrations**).

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

Scoops Description Keywords

enterprise software x acquisition x acquire x

Clear

Enter value

Scoops Types

21 selected

Clear All

All



# Jun 18, 2024 ZoomInfo Sales Release

## Highlights

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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.

< 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

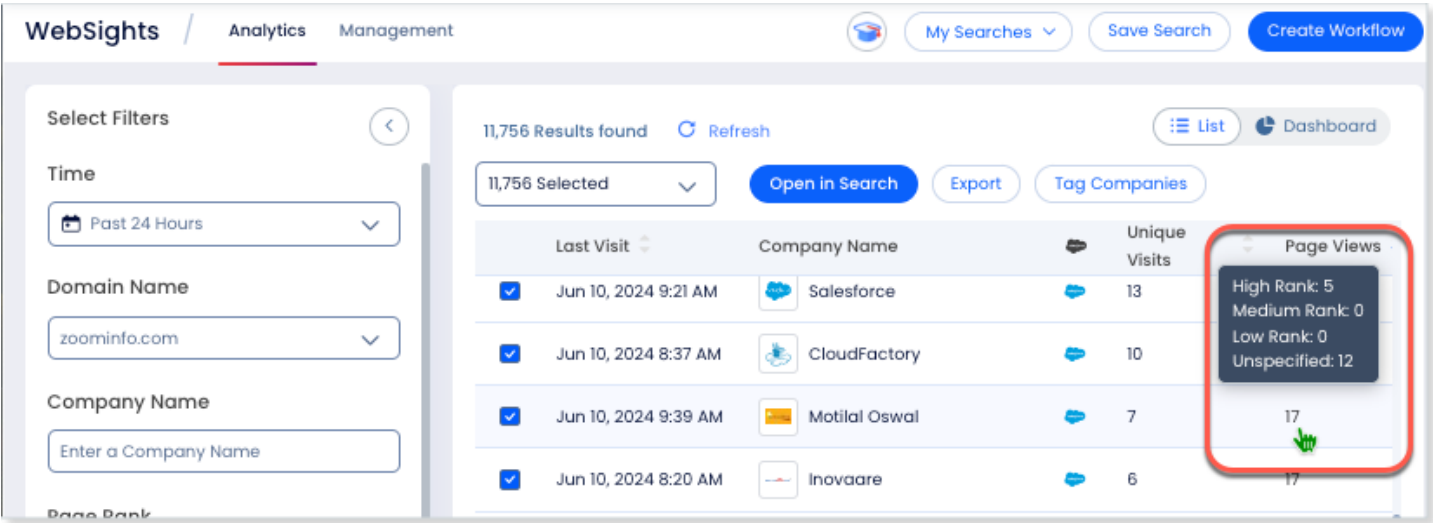
+ Add New

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.

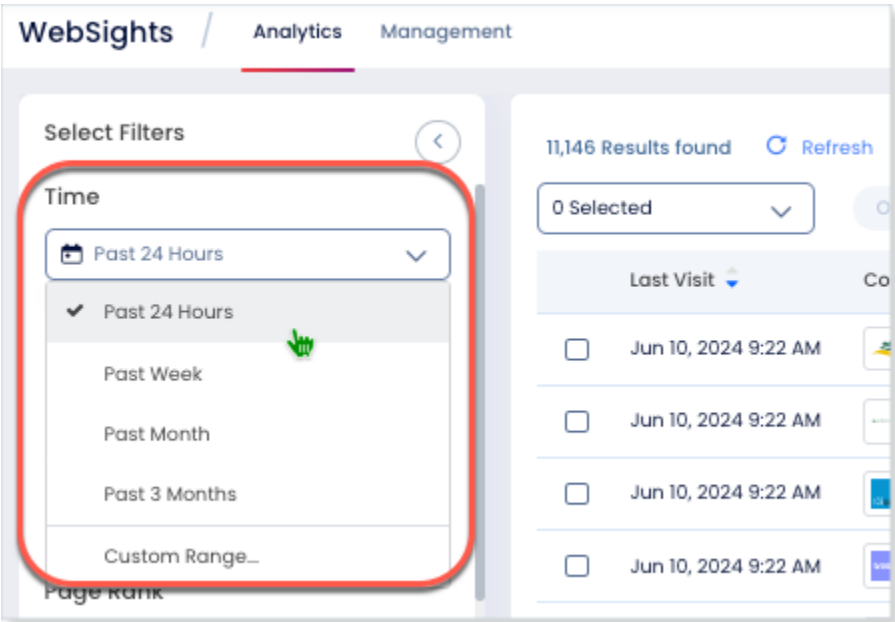


## Access Up to 6 Months of WebSights Historical Data

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.

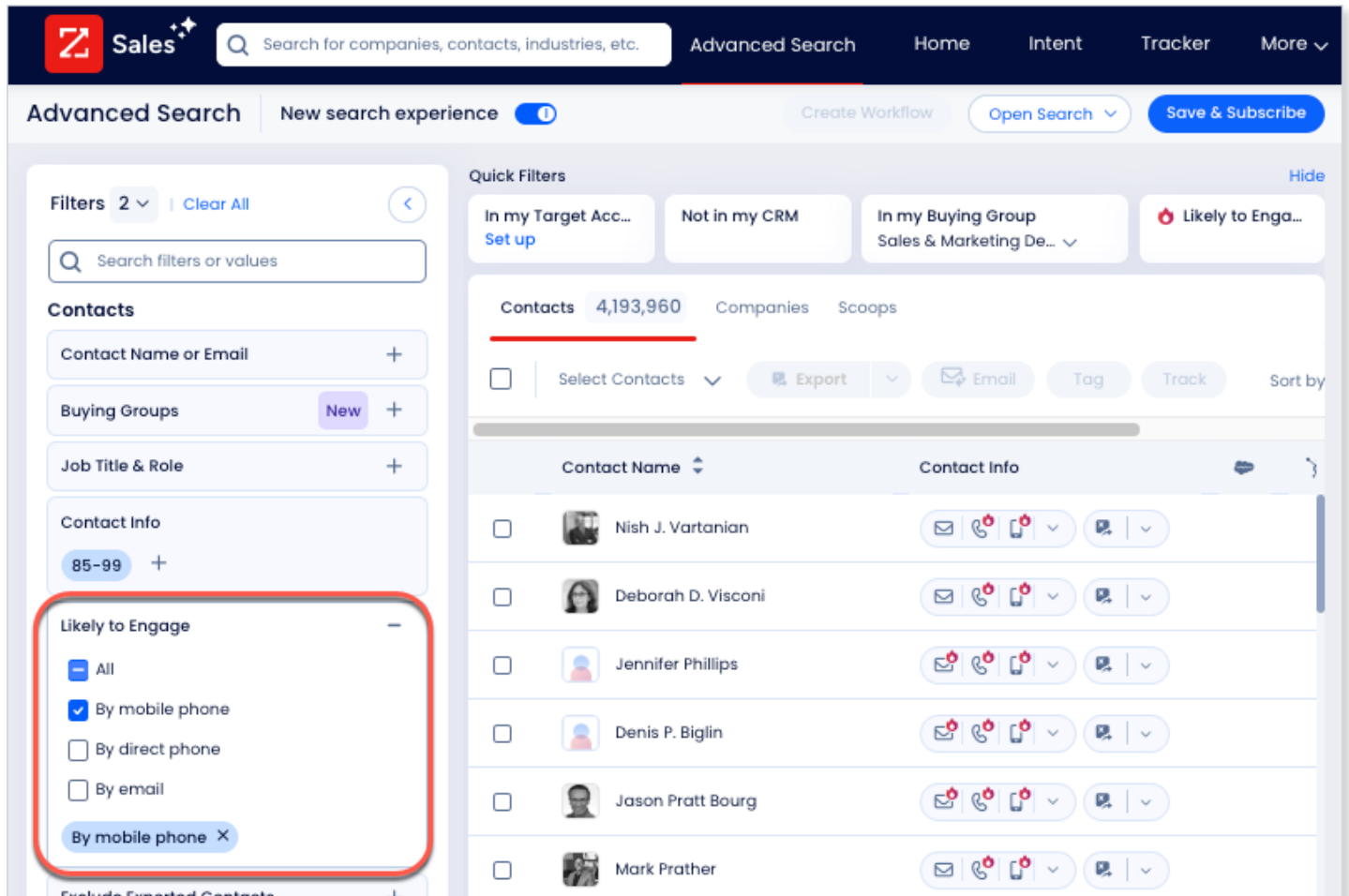
When configuring WebSights Analytics filters, users can select a predefined range (**Past 24 Hours**, **Past Week**, **Past Month**, **Past 3 Months**) or a **Custom Range** of up to 6 months from the current date.

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.

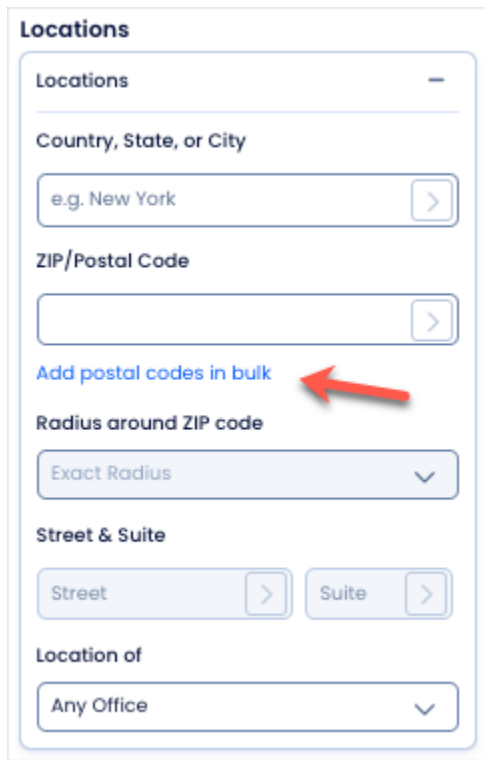
You can use bulk entry in the following Advanced Search categories:

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

## How It Works

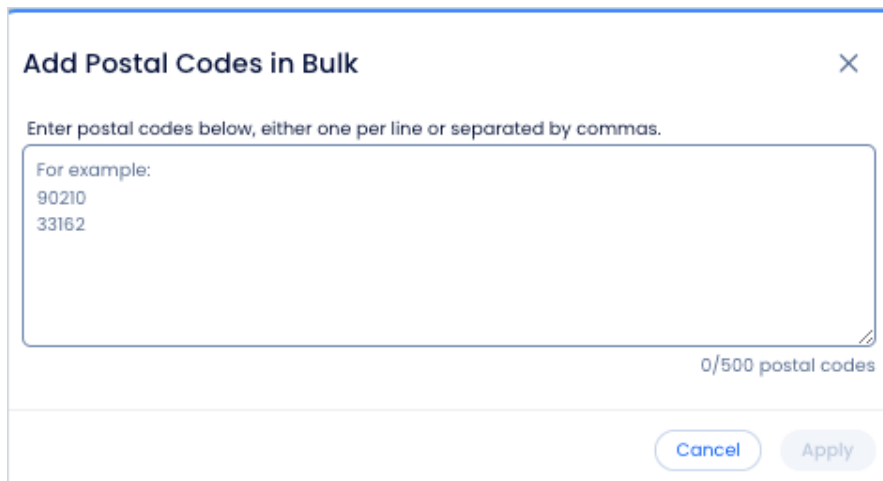
Bulk entry works the same for the supported Advanced Search categories. Here's an example of how you'd use bulk entry with the Locations filter.

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



The screenshot shows the 'Locations' filter panel. It includes fields for 'Country, State, or City' (with a placeholder 'e.g. New York'), 'ZIP/Postal Code', 'Radius around ZIP code' (set to 'Exact Radius'), 'Street & Suite' (with 'Street' and 'Suite' sub-fields), and 'Location of' (set to 'Any Office'). A red arrow points to the 'Add postal codes in bulk' link, which is located below the 'ZIP/Postal Code' field.

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



The screenshot shows the 'Add Postal Codes in Bulk' dialog box. It has a title bar with a close button (X). The main text says 'Enter postal codes below, either one per line or separated by commas.' Below this is a large text input area. To the left of the input area, there is an example: 'For example: 90210 33162'. At the bottom right of the input area, it says '0/500 postal codes'. At the bottom of the dialog, there are two buttons: 'Cancel' and 'Apply'.

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

## Highlights

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## Data Passport Controls

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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

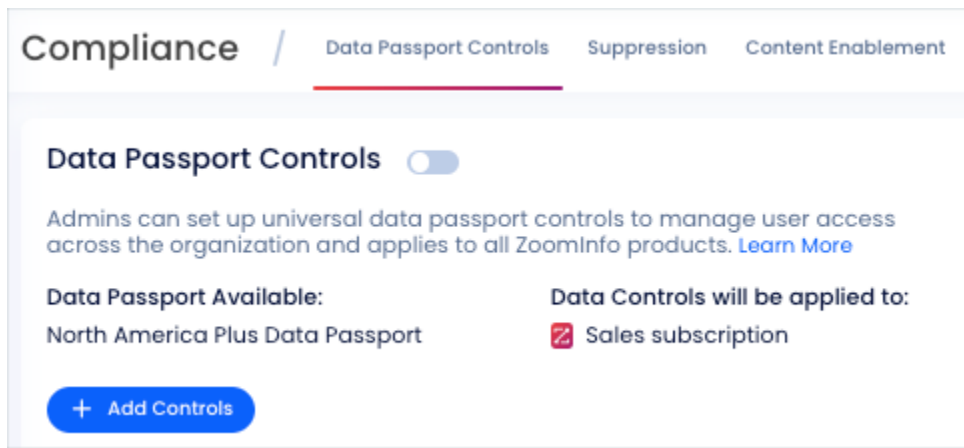
### Who Gets It

Organizations with the *ZoomInfo Sales Elite+* package.

### How It Works

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### Limitations

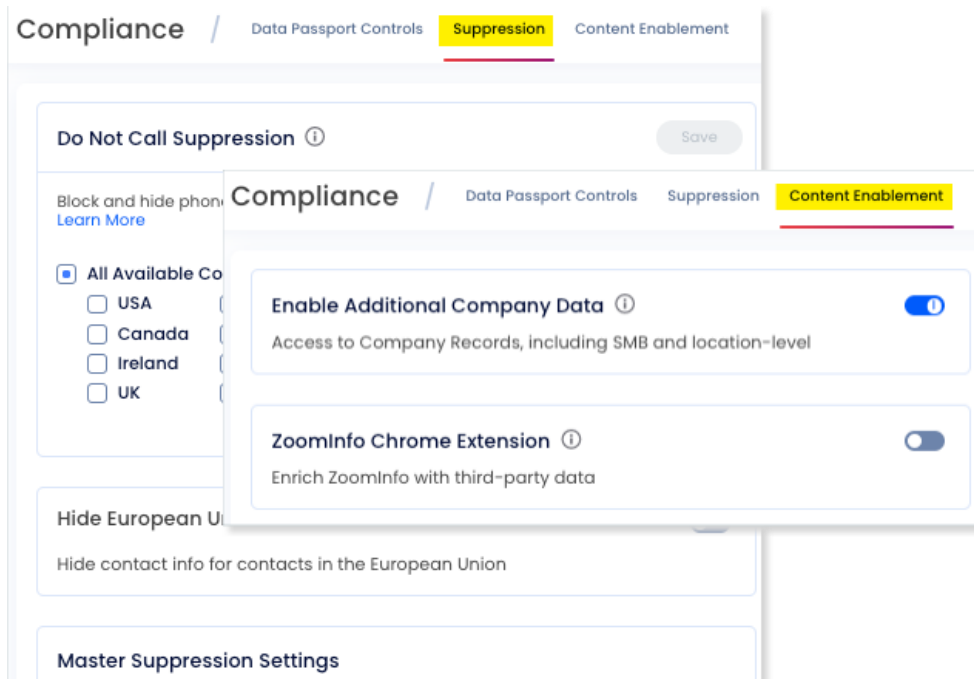
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## Related Changes

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- 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](https://billing.zoominfo.com).



[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.



[Overview](#)
[Invoices](#)
[Billing Information](#)
[Payment Methods](#)
[Buy More](#)
[Contact Support](#)

### Overview

**Plan**
Active

**Details**

Number: 00899950

Start Date: Aug 18, 2023

End Date: Aug 17, 2024

**Primary Contact**


Name: Vid J. Test

Email: vidrao@zoominfo.com

Phone Direct: +12124449399

**Payment Status**

☒ Auto Payment

 \*\*\*\* 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: vidrao@zoominfo.com

Phone Direct: +12124449399

**Payment Status**

☐ Auto Payment

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



Overview

Invoices

Billing Information

Buy More

Contact Support

JD


Invoices

To make a payment via wire transfer, or any method other than credit card, please click [here](#)

\* Showing only invoice form July 2023 onwards

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**.



Overview

Invoices

Billing Information

Payment Methods

Buy More

Contact Support

JD

Billing Information

Save Changes

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](mailto: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.

Product Release Notes

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 zoominfo


OverviewInvoicesBilling InformationPayment MethodsBuy MoreContact SupportJD

Payment Methods

Add New Payment Method

Card number

1234 1234 1234 1234




Expiration

MM / YY

CVC

CVC



Country

United States

ZIP

12345

By providing your card information, you allow ZoomInfo Technologies LLC to charge your card for future payments in accordance with their terms.

Additional Payment Terms

Cancel

Save

## 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.

Trigger

When someone visits **zoominfo.com** any number of times then

Action(s)

discover up to **5** contact at each company and  
who are in my buying committee then

export to SugarCRM as **accounts** and assign to select user

A CSV file will be built placing records under management. View/manage in the action menu.

Export to SugarCRM

Update Existing Records

Create New Records

Record Type

☒ Accounts

☐ Contacts

☐ Accounts & Contacts

☐ Leads

Assign to user(s)

Select user(s)

New accounts, and their contacts, will be rotated among the users selected for assignment.

Export Details

# Apr 15, 2024 ZoomInfo Sales Release

## Highlights

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### [Gong Engage Integration: HubSpot Support](#)

## 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

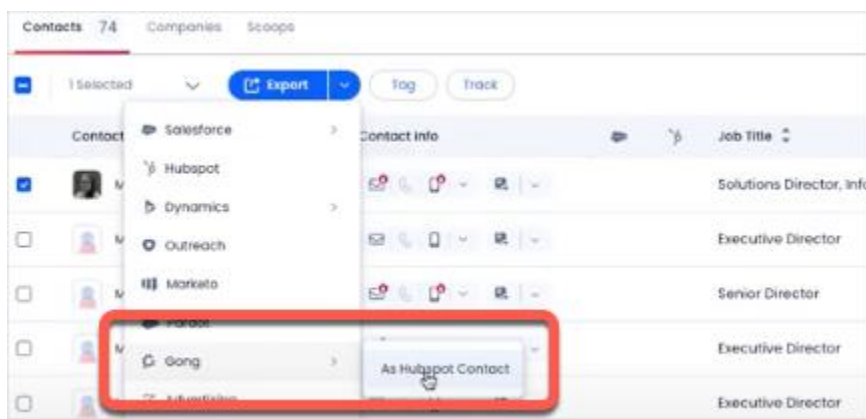
A ZoomInfo admin sets up the Gong Engage integration.

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.

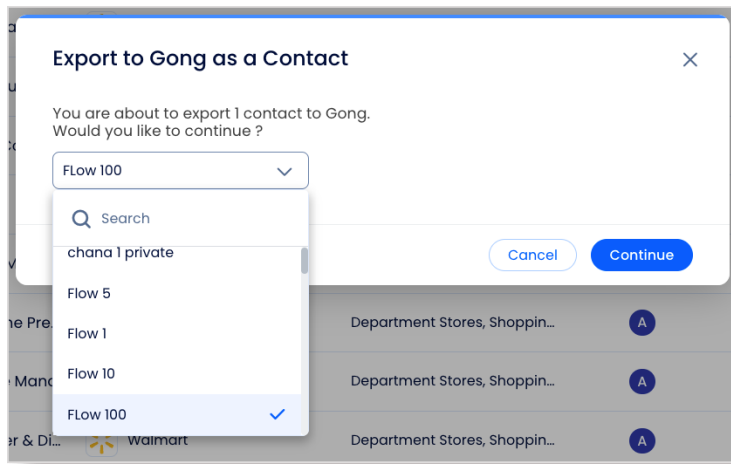
### How It Works for Users

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

## Highlights

[Back to top](#)

[TrustRadius Buyer Intent Integration](#)

[New Salesforce Report Filters in Workflows](#)

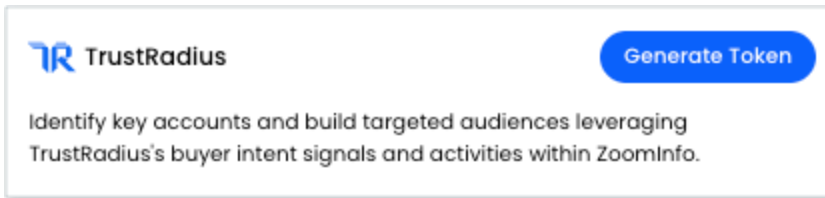
[Reset Two-Factor Authentication for Users in the Admin Portal](#)



## 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:

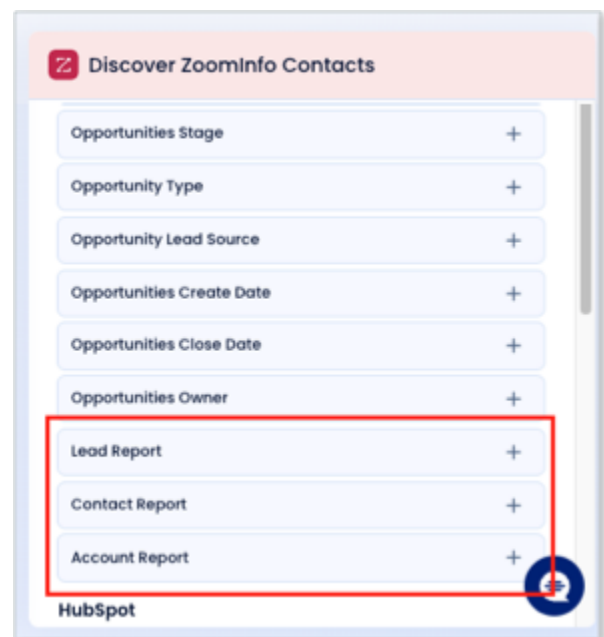
- ZoomInfo will automatically import TrustRadius buyer intent data nightly, ensuring timely insights.
- Your team can utilize TrustRadius buyer intent filters in Advanced Search along with ZoomInfo's extensive data to identify decision-makers at accounts showing active interest on [trustradius.com](https://www.trustradius.com),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

The screenshot displays the ZoomInfo Admin Portal's User Management section. At the top, there are tabs for 'Actions', 'Add Users', and 'Export all to csv'. Below these are filters for 'Show: All Active Inactive Only Admin(s)' and a search bar. A table lists users, with the first user, 'Matthew Dicki...', selected. The user's profile is expanded, showing fields for First Name, Last Name, Email, and User Name. The 'Additional Actions' dropdown menu is open, highlighting the 'Reset 2FA' option. Other options in the menu include 'Reset Password' and 'Deactivate'. The 'Save' and 'Cancel' buttons are at the bottom right of the profile section.

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

## Highlights

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[Improved Company Quick View Pane](#)

[Admins Can Now Update Intent Topics 12 Times Per Year](#)

[Workflows: New Filtering Options for the WebSights Trigger](#)

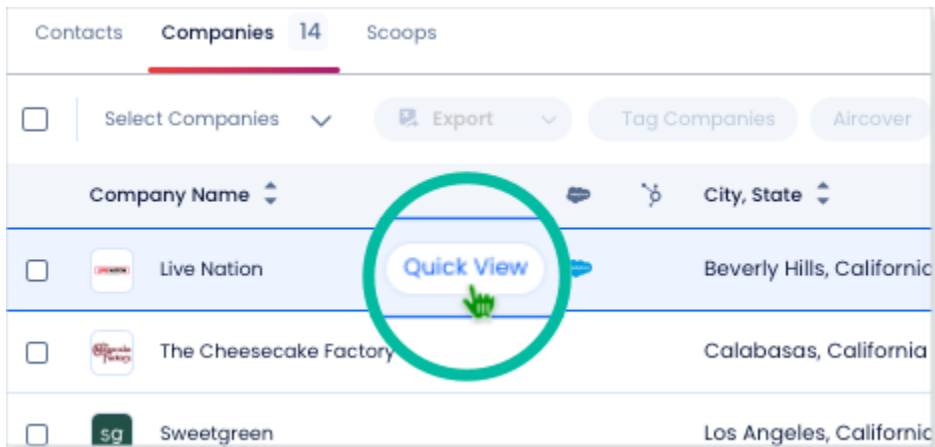
[Data Improvements](#)



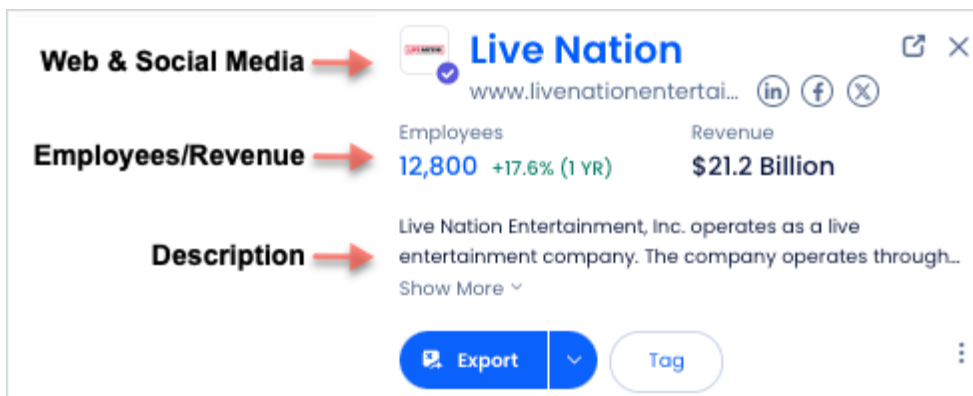
## Improved Company Quick View Pane

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 shows the 'WebSights' configuration panel in a workflow editor. The workflow is titled 'Site Visit Targeting - Mon Feb 05 2024 14:28:13 GMT+0530'. The trigger is set to 'WebSights' with a frequency of 'Scheduled Weekly'. The 'Limit Enrolled Companies' is set to 500 (Max 3,500). The 'Domain Name' is 'zoominfo.com'. The 'Webpage(s) URL' filter is set to 'Contains'. The 'Number of Visits' filter is set to 'Page Views'. The 'Minimum Session Duration' filter is set to 'Seconds' and 'Minimum'. The 'Page Rank' filter is set to 'Select Page Rank'. The workflow actions are: 'When someone visits zoominfo.com on any page from then', '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', and 'discover up to 20 ZoomInfo contacts per company'. Red arrows point from the workflow actions to the 'Minimum Session Duration' and 'Page Rank' filters.

Workflow: OFF | Close

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.

A screenshot of a search filter interface. At the top, the text 'Webpage(s) URL' is displayed. Below it is a dropdown menu with a blue border and a downward arrow. The menu is open, showing a list of options: 'Contains' (highlighted with a blue background and a blue checkmark), 'Exactly Matches (=)', 'Begins With', 'Ends With', and 'Excludes'. At the bottom of the dropdown, there are input fields for 'Min' and 'Max' separated by a minus sign, with right-pointing arrows on either side.

## 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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[CRM Auto Provisioning \(Salesforce\)](#)

[Integrations: Auto Connect All HubSpot Users from the Admin Portal](#)

[Integrations: Gong Engage](#)

[Integrations: Pardot Export Limit Increased to 10k](#)

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[Workflows: Easy access to view and download CSV files for Workflow runs](#)

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[Workflows: Ability to Manage Bulk Credit Limits Per Workflow](#)

[Data Improvements](#)



## 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.

The screenshot shows the 'Create Subscription Set' dialog in Salesforce. The 'Users' tab is active, showing a list of profiles. The 'Sales Ops' profile is selected. The 'Add role(s)' tab shows a 'Select roles' dropdown. The 'Add individual(s)' tab shows a 'Search users' field and a table of users with columns 'Sales Ops' and 'Contracts'. The table has four rows, each with 'Sales Ops' and 'Contracts' buttons. At the bottom, there are 'Cancel', 'Back', and 'Next' buttons.

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.

HubSpot | General Settings

**General**

Connection Name: HubSpot

ZoomInfo Admin: [Redacted]

Service Account User: [Redacted] [Change User](#)

Export Preference:

- ☒ **Service Account**  
Exports will run using the service account user  
[Edit User Mapping](#)
- ☐ **User Account**  
Users must connect their Hubspot account to make export

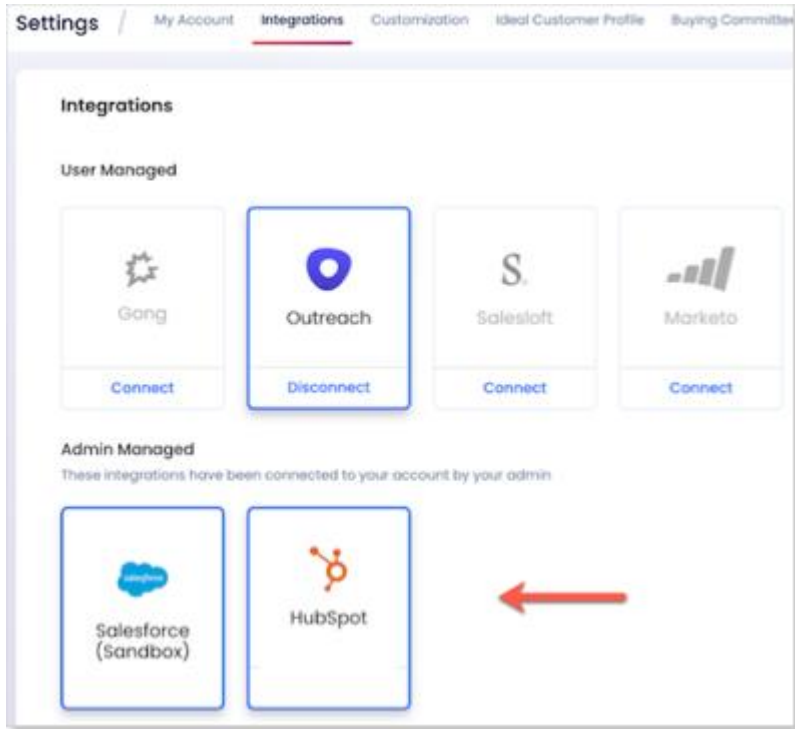
**How it works (for new customers):** The service account option is the default configuration when setting up the configuration. Admins can choose to automatically connect all their users to HubSpot or to have their users manually connect with their own usernames and passwords.

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.

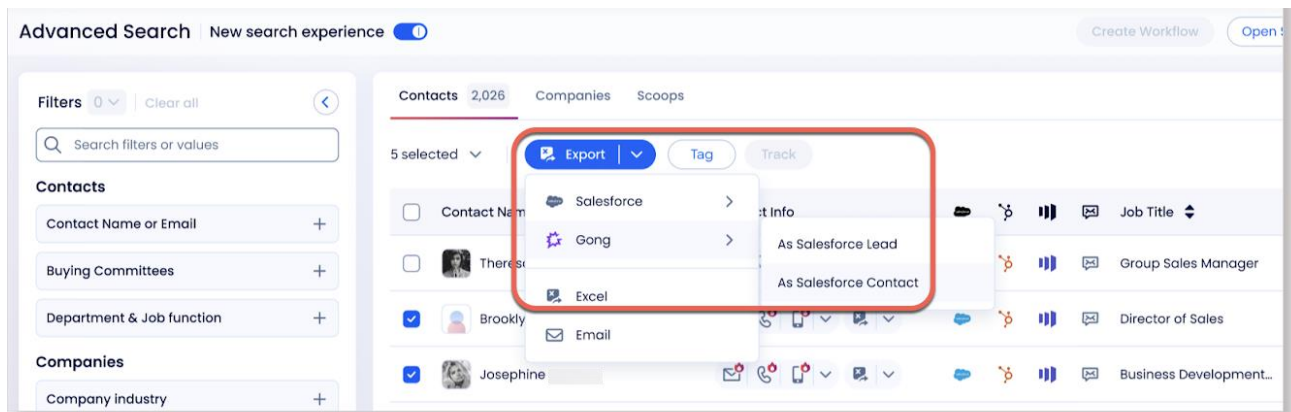
Previously, importing ZoomInfo Sales data into Gong involved exporting a CSV from ZoomInfo Sales and manually uploading it into Gong. This direct integration greatly reduces time and effort.

### Integration setup (admins):

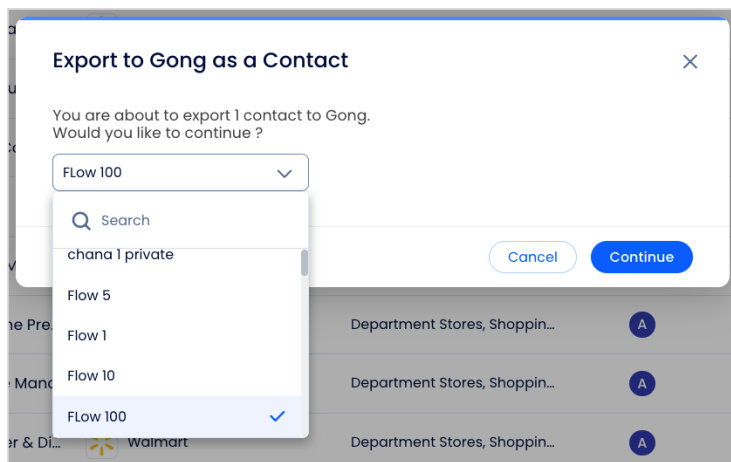
Admins managing the ZoomInfo Sales and Salesforce integrations can find details on setting up the Gong integration in the [Gong Engage Integration Guide](#).

### How it works (for users):

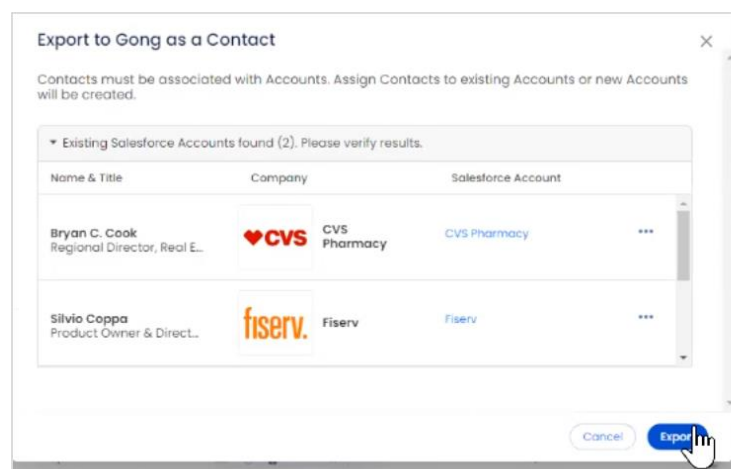
1. In ZoomInfo Sales, select contacts for export.
2. From the **Export** dropdown, select **Gong**.
3. Select **As Salesforce Lead** or **As Salesforce Contact**.



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

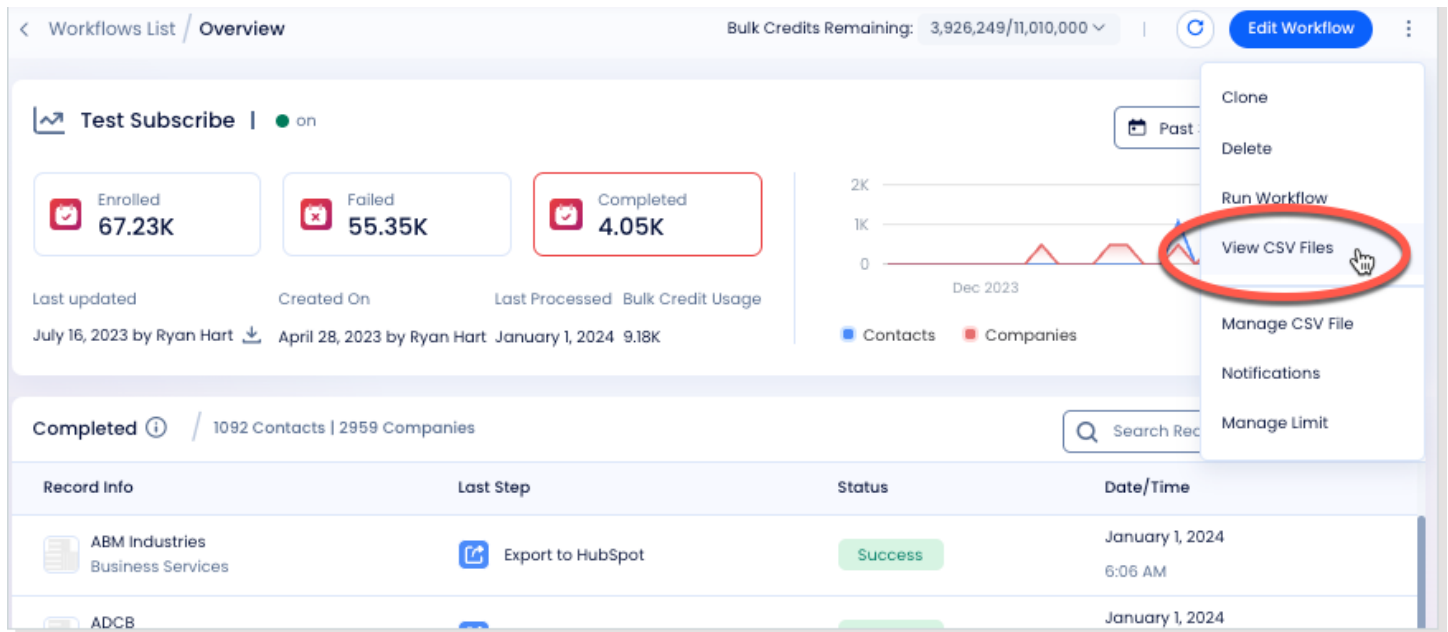
We've enhanced the calculation of our In-Market Score (IMS) to include advertising signals - specifically, **impression data** and **click data** for ads:

- **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 status 'on'. Below this, three boxes show 'Enrolled 67.23K', 'Failed 55.35K', and 'Completed 4.05K'. A line graph 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 graph, a table shows 'Completed' status with '1092 Contacts | 2959 Companies'. The table has 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, dated 'January 1, 2024 6:06 AM'. The second row shows 'ADCB' with a 'Success' status, dated 'January 1, 2024'.

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

Test Subscribe | on

Past 30 Days

Enrolled  
67.23K

Last updated  
July 16, 2023 by Ryan

Completed 1

Record Info

ABM Indust  
Business S

ADCB  
Banking

Alvernia Un  
Colleges &

Pool Sales  
Convenient  
Stores

Bales  
Manufacturing

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	
Dec 28, 2023	500	6,606	
Dec 26, 2023	500	6,842	
Dec 25, 2023	500	7,481	
Dec 24, 2023	500	6,724	

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 <span>on</span>	WebSights Immediate	2.31M	1.06K	2.31M	0	AK Jan 9, 2024	AZ Jan 9, 2024	...
Streaming Websights - <span>off</span>	WebSights Immediate	1.71M	70	1.71M	121.19K	NL Jan 9, 2024		<div> Edit </div>
test wf name 2 <span>on</span>	WebSights Immediate	1.14M	970	1.14M	80.11K	AK Nov 29, 2023		<div> Clone </div>
Site Visit Targeting - Thu <span>on</span>	WebSights Immediate	1.14M	969	1.14M	0	RH Aug 2, 2023		<div> Delete </div>
Site Visit Targeting - Thu <span>on</span>	WebSights Immediate	1.14M	965	1.14M	0	JF Oct 31, 2023		<div> View CSV Files </div>
subs test <span>on</span>	WebSights Immediate	1.14M	934	1.14M	79.73K	JF Nov 21, 2023		<div> Manage CSV File </div>
								<div> Notifications </div>
								<div> Manage Limit </div>

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.

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

 Enrolled  
1.14M


 Failed  
1.22K

 Completed  
1.14M

Last updated  
August 21, 2023 by Deveshwar D 

Created On  
August 21, 2023 by Deveshwar D

Last Processed  
January 9, 2024

Bulk Credit Usage  
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 line graph shows bulk credit usage over time, with a peak in December 2023. A dropdown menu is open, showing options: Clone, Delete, View CSV Files, Manage CSV File, Notifications, and **Manage Limit** (highlighted with a red circle and a hand cursor). Below the statistics, a table lists records with columns: Record Info, Last Step, Status, and Date/Time. The first record is for Ian Cuthbertson, with the last step 'Discover ZoomInfo Contacts' and a status of 'Success' on 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 has a title bar with a close button. It contains a section for 'Manage CSV File' and 'Notifications'. The 'Limit bulk credits usage' option is selected with a radio button. Below this, the 'Credit Limit' is set to 5,000 and the 'Time Period' is set to 30 Days. A note at the bottom states: 'You have used 4,518 bulk credits of the 5,000 limit in the past 30 days'. At the bottom right, 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 <a href="#">Limit set</a>

- 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.

