Salesforce Integration Guide for Engage

For administrators setting up the ZoomInfo Engage integration with Salesforce

ZoomInfo Engage is a sales engagement platform designed to help maximize your sales teams' productivity, increase effective communications, and streamline your tech stack so your team can close more deals. Engage is a one-stop experience that combines data insights and intelligence, communications, and Salesforce tracking all in one convenient location.

Intended Audience

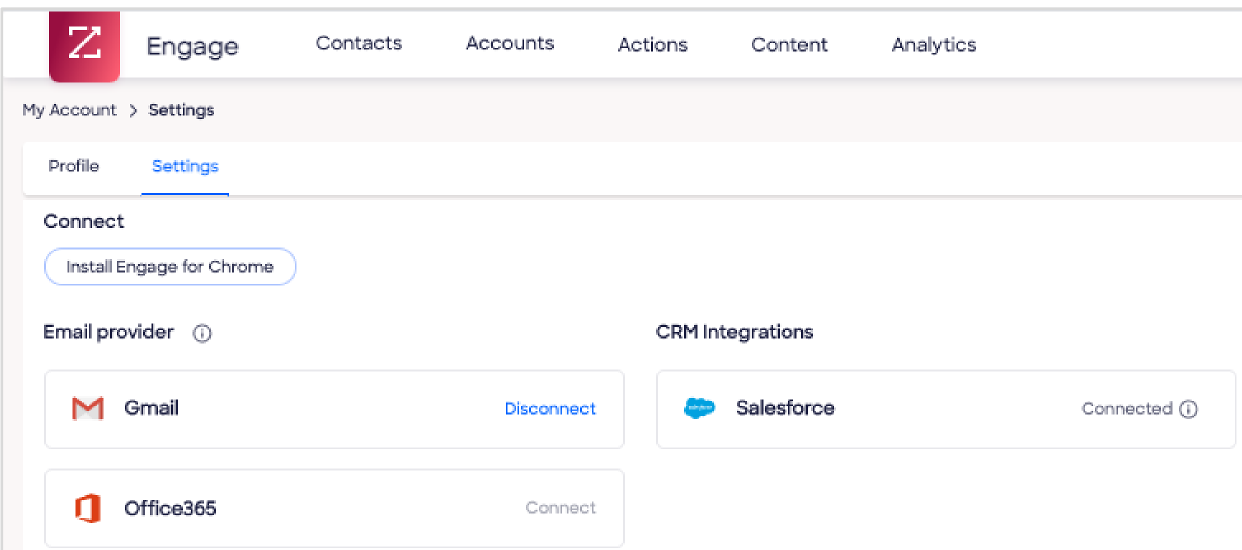
This guide is intended for Engage administrators tasked with managing Engage and the integration with Salesforce for users in their organization.

Connect to Salesforce

As an Engage admin, you connect to your Salesforce instance when completing the onboarding wizard, establishing the single connection used by all Engage users and admins.

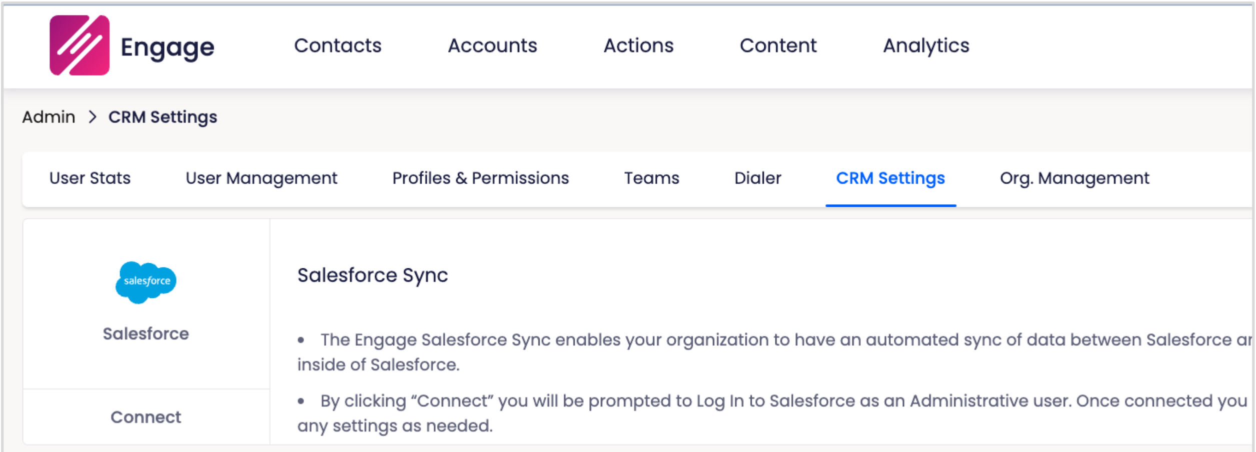
Required permissions: The Engage admin establishing the connection must use a Salesforce account with permissions to read, create, and edit data on Accounts, Contacts, Leads, and Users.

Once you are successfully connected, your users will see the connection status in **My Account > Settings**.



Configure Salesforce Integration Settings

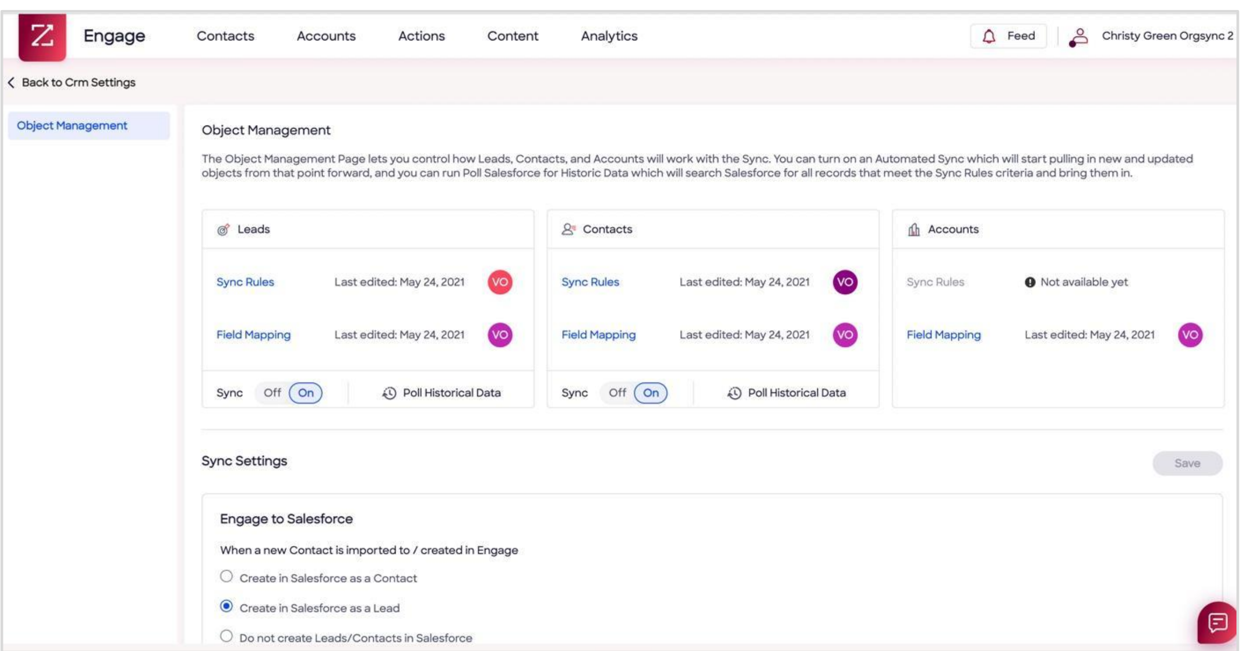
The **CRM Settings** tab gives you control over how information is synced between Engage and Salesforce.



The primary benefits of syncing with Salesforce include:

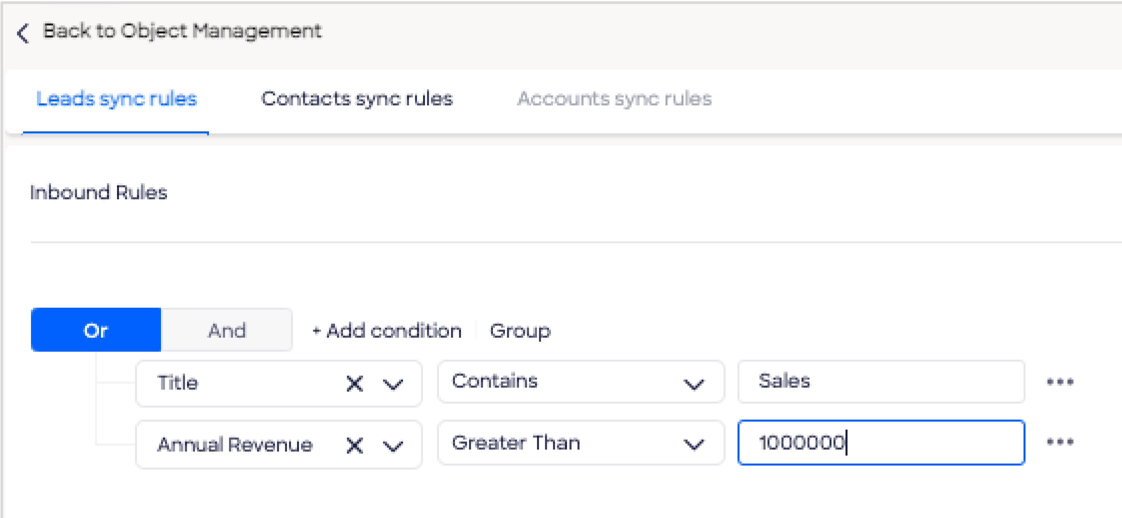
- **Automated Sync**: Ensures users have the most up-to-date information when engaging with prospects
- **Historical Data Pull**: Populates Engage with existing Salesforce contacts
- **Sync Rules**: Prevents clutter in Engage by ignoring outdated and irrelevant Salesforce contacts
- **Bi-Directional Fields**: Provides users access to Salesforce-only fields inside Engage for better prospecting

You can manage and adjust sync settings by clicking **Manage**.



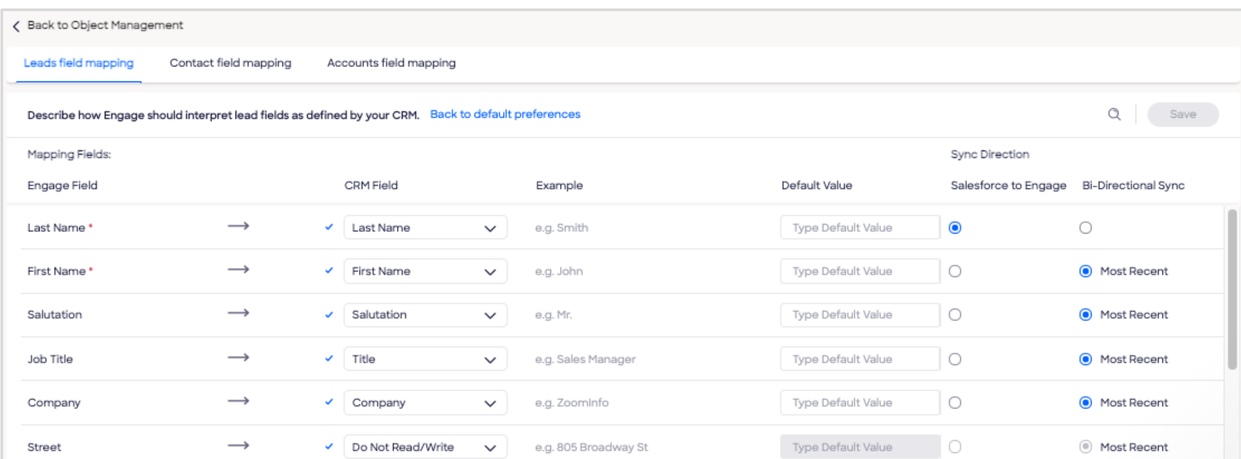
Sync Rules

Click **Sync Rules** for Leads and Contacts to define and manage the rule criteria defining the records you want to sync (sync rules for Accounts are not yet available).



Field Mapping

Click **Field Mapping** to define and manage the field mapping settings for Contacts, Leads, and Accounts.

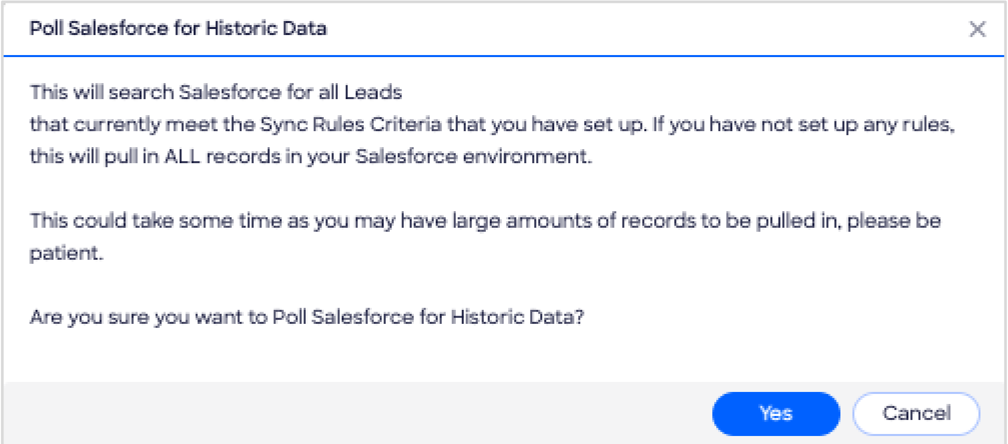


Sync (On | Off)

Turn Sync **On** or **Off** for Leads and Contacts using the toggle. When toggled to **On**, data will be synched every 5 minutes.

Poll Historical Data

Click **Poll Historical Data** to poll Salesforce and find Contacts and Leads that match the currently configured sync rules.

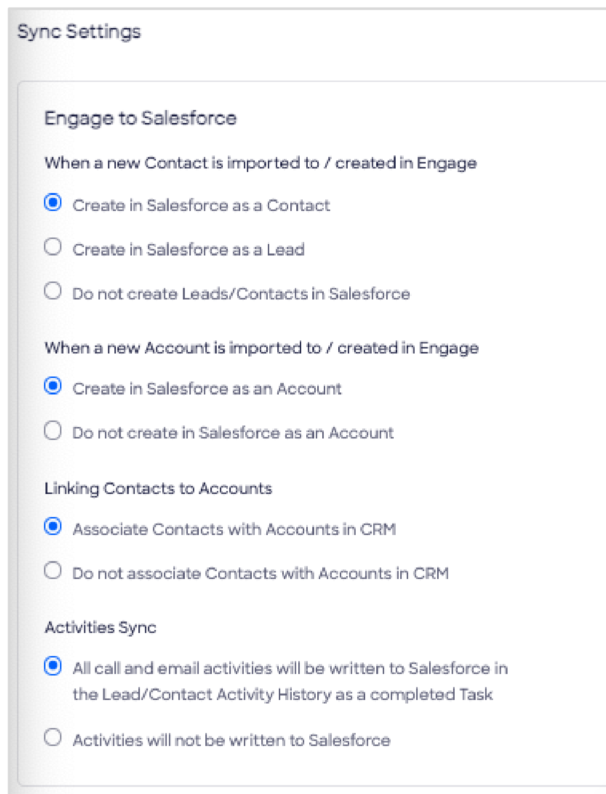


- Ensure that you first set up rules before polling historical data to ensure that you're not inadvertently syncing *all* records in your Salesforce environment.
- If a record in Salesforce meets the sync rules and matches a record in Engage, fields in Engage will be updated based on the **Field Mapping** configuration. Otherwise, a new Contact will be created in Engage.

Sync Settings

Fine tune your sync settings, including:

- How Contacts and Accounts created or imported in Engage are handled when synced to Salesforce.
- Whether to automatically associate Contacts and Accounts in Salesforce.
- Whether call and activity history is written to Salesforce.



Salesforce Integration Details

This section describes important details for admins to understand and consider.

Connection Details

Engage uses OAuthv2.0 as recommended by Salesforce to access Salesforce data. Policies and security are strictly enforced by Salesforce, including triggers and validation rules.

Salesforce Account Permissions

The Engage admin establishing the connection between Engage and Salesforce must use a Salesforce account with permissions to read, create, and edit data on Accounts, Contacts, Leads, and Users.

Salesforce API Requirements

Salesforce enforces the number of API calls per day based on the Salesforce user license. To integrate with Salesforce, Engage requires one of the following Salesforce editions which include API access:

- Enterprise Edition
- Unlimited Edition
- Developer Edition
- Performance Edition

Working with Leads and Contacts

Engage does not sync all Salesforce contacts, relying on Salesforce to present the most up-to-date contact information until an Engage user performs one of the following actions:

- Sends an email
- Uses the dialer
- Adds a contact to a Salesflow

With these actions, Engage makes a copy of contacts to be used for analytics and reporting. Contact details in Salesforce remain the “one source of truth,” and any edits must be done in Salesforce.

Adding a Contact to Engage

Engage users can add a contact to Engage by one of the following methods:

- Importing a CSV file
- Using the New Contact button
- Using the ZoomInfo integration
- Importing from a public Salesforce List
- Using the Automated or Manual Sync from Salesforce
- Using the Engage Chrome Extension

When a contact is added, Engage checks Salesforce to see if the lead or contact exists based on the email address, name, and phone number.

- If the lead or contact exists, Engage will use the contact information from Salesforce. Engage does not duplicate leads or contacts in Salesforce.
- If the contact does not exist, Engage can be configured to create a new lead, create a new contact, or not create a new lead or contact in Salesforce.

Updating Salesforce Leads or Contacts in Engage

Engage prevents updating a Salesforce contact from Engage - all update operations must occur in Salesforce with the following exceptions for bi-directional fields:

- **Contact Email Opt Out field**: If mapped, this field is updated when a prospect clicks the unsubscribe link in an Engage-generated email.
- **CRM Lead Status field**: If mapped, this field is updated when an Engage user updates the Engage Contact Status within Engage.

Note: Custom CRM Contact Status fields are not currently supported.

Deleting Salesforce leads or contacts in Engage

Engage prevents the deletion of Salesforce contacts. All delete operations must occur in Salesforce.

Call Activity Synchronization

For each call made from the Engage Dialer, a completed task is logged under the Lead or Contact **Activity History**. The following **Task** fields are automatically populated based on the information the user inputs into the **Call Log**.

CRM Task	Details
Subject	Engage Call: {Subject}: If your Task Subject has a picklist, the picklist is shown in the Engage Call Subject field. A user can type a Subject and/or use the CRM picklist.
Call Result	{PicklistValue}: ● Connected via direct line: Considered a "conversation" ● Connected via switchboard: Considered a "conversation" ● Referred to colleague: Considered a "conversation" ● Left message ● No answer ● Wrong number ● Gatekeeper - blocked
Comments	The comments section will capture the following four Engage call log fields: ● **Sentiment**: This picklist field is only available when the call Result was a "conversation". A call is considered a conversation when the Call Result equals Connected via direct line, Connected via switchboard, or Referred to a colleague. ○ Bad timing ○ No fit ○ Not interested ○ Request for callback ○ More information requested ○ Next step booked ● **Comments**: Open text field ● **VoiceMail Left**: {VmTitle} ● **Call Recording URL**: {CallRecording URL} if call recording is enabled by the Engage admin.
Call Duration (minutes)	{CallTime}
Call Duration (seconds)	{CallTime}

Email Activity Synchronization

For each email event, Engage sets the title, date, and optionally the description. The following activities are logged in Salesforce as a completed **Task**.

CRM Task	Details
Subject	Engage: {Event} I {EmailSubject} or {LinkText}: • Sent Email. This completed Task also includes the original email message body sent. • Email opened • Email failed • Contact unsubscribed • Content viewed. Occurs when the recipient clicks one of the attachment links that in turn takes the recipient to the Engage content landing page in a new browser tab. • Content downloaded • A link clicked. Occurs when the recipient clicks a tracked hyperlink. • Email reply. Occurs when the recipient replies directly to the email originated from Engage. For this event to be logged, the user must be connected to their email server, Office 365, Exchange, or Gmail.
Comments	{EmailMessageBody}

Security and Privacy FAQs

What happens to the Engage account when my employee leaves?

We recommend disabling access to Salesforce when an employee leaves your organization. This will also prevent access to Salesforce from Engage. As an Admin Engage user, you can delete the Engage user from the **Admin > User Management** page. When a user is deleted from Engage, all of their integrations are disconnected.

Does Engage have all my company contact data?

No. Engage does not use a true sync mechanism to manage Salesforce leads and contacts. Engage uses API directly to display the most current Salesforce lead or contact details.

Will Engage pollute my company contact data?

Engage makes the best effort not to pollute the CRM Lead/Contact data by:

- Not creating duplicate leads or contacts in Salesforce
- Honoring the validation rules. For example, if the validation rule requires a valid two state code, Engage will correspondingly honor that rule.
- Honoring other Salesforce policies and security configuration in Salesforce. For example, Salesforce Duplicate rules.

Do all users who use Engage must be connected to Salesforce?

No. For each user, connecting to Salesforce is optional. If connected, we recommend that all users connect to the same instance of Salesforce to keep your Engage Contacts free from data pollution.

Can I turn my Salesforce integration on or off for my organization?

Yes. For assistance, contact engagesupport@zoominfo.com. In addition, you can configure the Lead/Contact Sync and/or Lead/Contact Activities that flow to Salesforce from the Admin CRM section.