

Salesforce Integration Guide for ZoomInfo Talent

For administrators setting up the ZoomInfo Talent integration with Salesforce.

Configure the Connection	2
Configure Integration Settings	3
Configure Export Preferences	4
Configure Custom Mapping	5
View and Manage Connected Integrations	7
Connect Users	8

ZoomInfo Talent helps recruiters find, organize, and connect with the right candidates using ZoomInfo's data. An admin can connect the Salesforce integration to enable their organization's recruiters to export candidates and manage them in Salesforce.

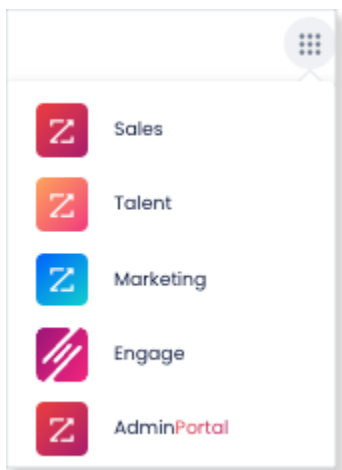
Important: The Salesforce integration for ZoomInfo Talent is separate and has fewer options than the Salesforce integration for ZoomInfo Sales and ZoomInfo Marketing.

To get connected:

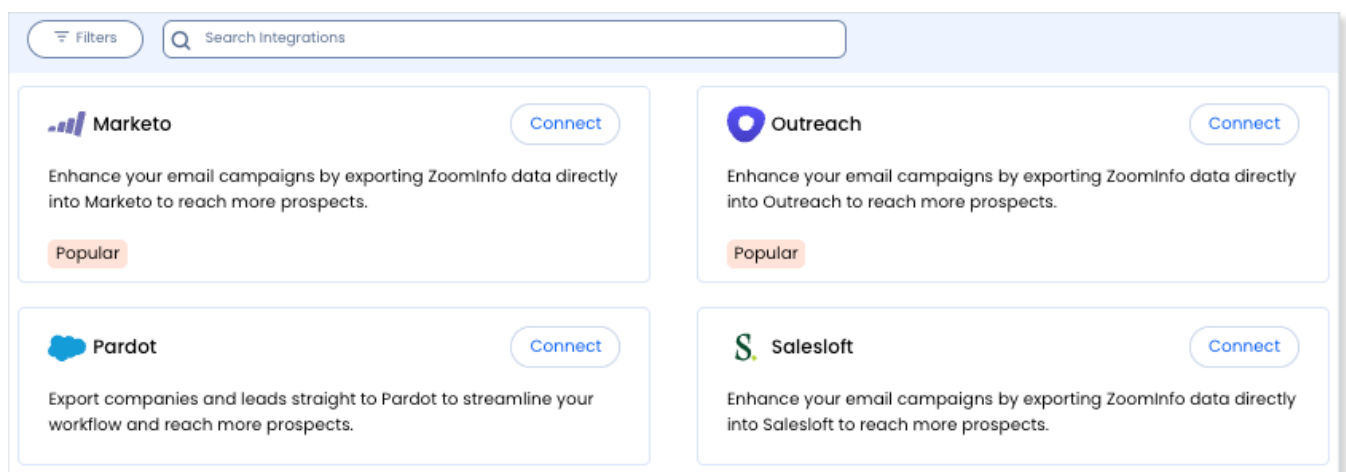
1. A ZoomInfo Talent admin establishes the connection to Salesforce and configures export and custom mapping settings for their organization.
2. The admin enables the integration for their organization's users.
3. Users connect to Salesforce using their credentials to begin exporting accounts, contacts, and leads.

Configure the Connection

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



2. Click **Integrations**.



3. Use the **Filters**, or **Search integrations** options to find your integration.

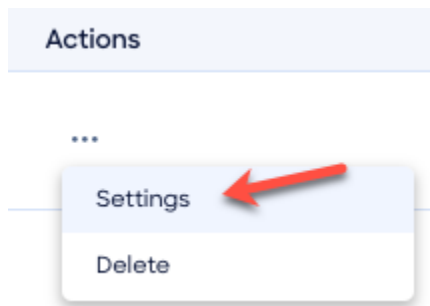
4. On the tile for your integration, click **Connect**.
5. Complete the connection using your credentials.

Configure Integration Settings

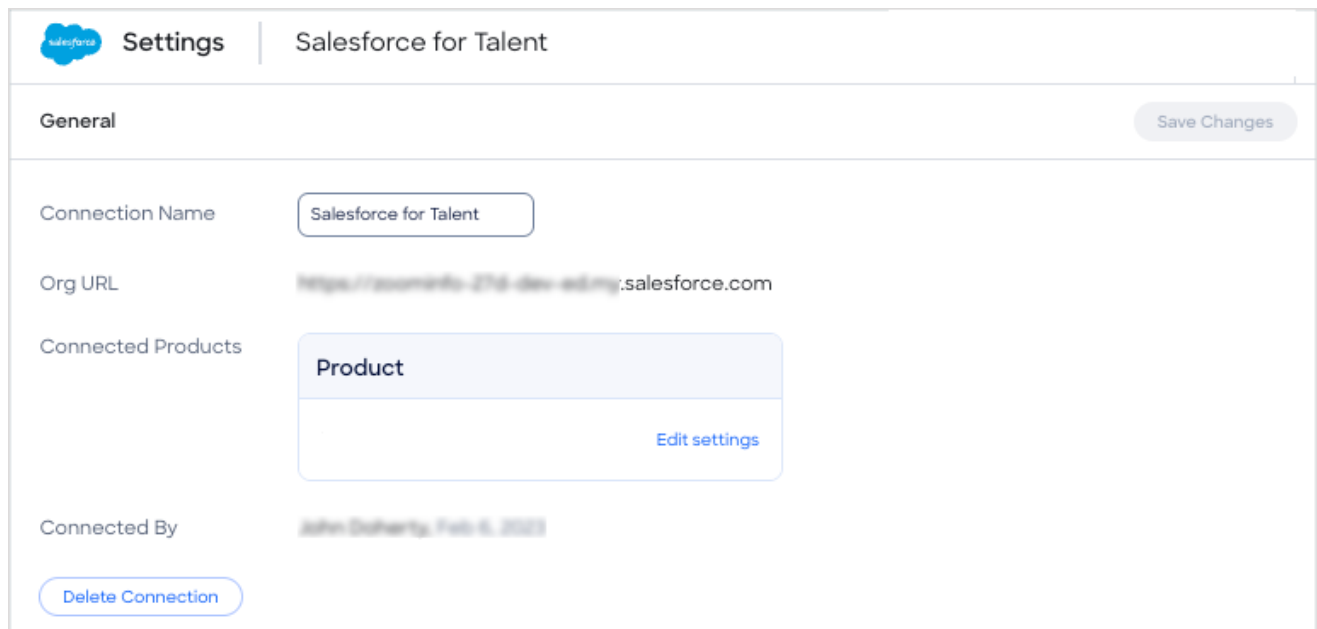
Once your integration is connected, you can configure the settings, including export preferences and mapping:

To access the **Settings** page for your integration:

- Click **Edit Settings** from the connection success message.
- If you've already closed the connection success message, navigate to the **Connected** tab and click ... > **Settings** in the **Action** column.



The **Settings** page displays.



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

Configure Export Preferences

ZoomInfo admins can configure export preferences and limit the objects that can be exported:

1. Click the **Export** tab.
2. Select the export options for exporting ZoomInfo records to Salesforce.

Mapping **Export** Save Changes

Export Preferences [Back to default preferences](#)

Select which object types your users are allowed to export to Salesforce?

Accounts ^

Contacts v

Max number of contacts a user can export to Salesforce at a time (up to 2,000):

Create and Update Rules:

Create new Contacts ⓘ

Update existing Contacts ⓘ

Leads ^

Note: You can adjust the maximum number of records a user can export.

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

Configure Custom Mapping

Click the **Mapping** tab.

ZoomInfo Field	Salesforce Field	Example	Update Option
* Last Name	Last Name	e.g. Nir	Complete if mi...
First Name	First Name	e.g. Hila	Complete if mi...
Job Title	Title	e.g. Vice President of Mark...	Complete if mi...
Contact Street	Mailing Street	e.g. 307 Waverley Oaks Ro...	Complete if mi...
Contact City	Mailing City	e.g. Waltham	Complete if mi...
Contact State	Mailing State/Province	e.g. Massachusetts	Adv... Complete if mi...

On the **Mapping** tab, review the default mapping for each object type and make any changes.

Field	Description
ZoomInfo Field	Available ZoomInfo fields. Required fields are marked with an asterisk (*).
Salesforce Field	Available Salesforce fields. These fields are retrieved directly from your Salesforce instance.
Update Options	Select an option: <ul style="list-style-type: none">● Complete if missing (default) - Only complete with ZoomInfo data if none exists in Salesforce.● Overwrite field - Overwrite existing data in Salesforce with ZoomInfo data.

Add or Remove Fields

Add fields by clicking **Add Row** at the bottom of the field list. Each field that you add must be mapped to a corresponding field in your integration.

Click the trash icon to remove any fields that you do not want to map.

Personal Phone and Email Mapping

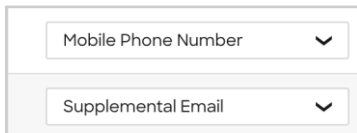
The default mapping for the Salesforce integration for ZoomInfo Talent is specific to talent acquisition use cases. For example, the phone and email mappings for contacts are focused on personal contact information instead of business contact information.

In ZoomInfo:

- A contact's business email address is stored in the **Email Address** field, and the personal address is stored in the **Supplemental Email** field.
- A contact's business phone number is stored in the **Phone** field, and the personal phone number is stored in the **Mobile Phone Number** field.

In ZoomInfo Talent:

Because recruiters typically want to engage with candidates through personal channels, we have included the **Mobile Phone Number** and **Supplemental Email** fields in the default mapping.



The image shows two dropdown menus stacked vertically. The top menu is labeled 'Mobile Phone Number' and the bottom menu is labeled 'Supplemental Email'. Both menus have a downward-pointing chevron icon on the right side.

If you want to also map the business email and phone number, you can click **Add Row** and map the ZoomInfo **Email Address** and **Phone** fields to corresponding fields in your integration.

Set a Hierarchy for ZoomInfo Data Within a Single Salesforce Field

In some cases, you may want multiple ZoomInfo fields to be stacked hierarchically within a single Salesforce field. For example, you want to import the ZoomInfo **Supplemental Email** (personal) and **Email Address** (business) fields into the Salesforce **Email Address** field.



The image shows two rows of mapping configuration. The first row shows 'Supplemental Email' in a dropdown menu followed by an arrow pointing to '1 Email' in another dropdown menu. The second row shows 'Email Address' in a dropdown menu followed by an arrow pointing to '2 Email' in another dropdown menu.

In this example:

- When contacts are exported to Salesforce, **Supplemental Email** will map to **Email**.
- If a contact has both a **Supplemental Email** address and business **Email Address** in ZoomInfo, the first occurrence of the Salesforce field will be denoted with number 1, and the second will be number 2.
- If a specific contact does not have a **Supplemental Email** in ZoomInfo, we will send the business **Email Address** field to the **Email** field in Salesforce.

Test and Save

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

+ Add Field

Test Mapping

- If the test record cannot be created, this is typically due to an error in the mapping settings. For example, mappings cannot be saved with a blank field.

✘ All fields must be filled. ✘

Adjust the settings and click **Test Mapping** again.

- If the test is successful, a notification displays.

✔ Contact mapping has been tested successfully. ✘

After performing a successful test mapping, click **Save Changes**.

- If the mappings are not set correctly, an error notification displays indicating the adjustments needed.

✘ All fields must be filled. ✘

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

- If mappings are correctly configured, a success notification displays.





✔ Contact mapping was saved successfully. ✘

View and Manage Connected Integrations

Once you've connected one or more integrations, you can view and manage them on the **Connected** tab of the **Admin Portal > Integrations** page.

Connected 19 All Integrations + New Integration

To maximize your experience, ZoomInfo now connects with the apps and products your organization is already using. Search, add, and manage your integrations here.

Integration Name	Date Connected	Category	Actions
<input checked="" type="checkbox"/>  PC Recruiter	Jun 13, 2022	ATS	...
<input checked="" type="checkbox"/>  Salesloft	Oct 10, 2022	Sales/Marketing	...
<input checked="" type="checkbox"/>  HubSpot	Oct 31, 2022	CRM	...
<input checked="" type="checkbox"/>  Salesforce	Dec 2, 2022	CRM	...

On this page, you can:

1. Use the toggle to turn an integration on or off for users in your organization. Toggling an integration to off does not affect the mapping and export settings you've configured.
2. Update the settings for an integration by clicking the integration name, or by clicking ... > **Settings** in the **Action** column.
3. Delete a connected integration (including any mapping and export settings you've configured) by clicking ... > **Delete** in the **Action** column.

Connect Users

Once the ZoomInfo admin has enabled the integration for all users by clicking the toggle to the left of the integration in the Admin Portal, individual ZoomInfo Talent users can connect to Salesforce.