Salesforce Integration Guide

For administrators setting up the ZoomInfo integration with Salesforce

Prerequisites and Considerations

Review the following prerequisites and considerations before you connect and configure the integration.

Salesforce REST API Requirement

The Salesforce Rest API is required for the ZoomInfo integration with Salesforce to function. The REST API is included with Force.com, Enterprise, Developer, Performance, and Unlimited Editions. If you have any other version of Salesforce (e.g., Professional), you'll need to purchase access to the REST API.

Permissions

The following permissions are needed in Salesforce:

- Permission to read the org ID in Salesforce
- Permission to “view setup and configuration”
- Access to API
- Read/Edit access to the Account, Contact and Lead objects
- Read/Edit access to the Campaign and Campaign Member object
- Read access to the Opportunity object in Salesforce
- Read access to the User object in Salesforce

SalesOS Salesforce Native Application

As a companion activity to the Salesforce integration configuration described in this document, you can further enhance your integration experience by also installing the SalesOS Salesforce Native Application.

Installing the Native App allows you to integrate ZoomInfo data directly within your Salesforce instance. With the Native App, your users can view records in Salesforce enhanced with ZoomInfo data, and enables your organization to benefit from ZoomInfo IDs, timestamps, and Salesforce dashboards without leaving Salesforce.

See the Salesforce Native App Implementation Guide for details on how to download, install, and configure the Native App from the Salesforce AppExchange.

Implementation Overview

Here's the flow for initial implementation:

1. Choose your export preference connection option.
2. Make the initial admin connection.
3. Configure your export settings (supported objects, limits and other settings)
4. Configure mapping between ZoomInfo data fields and Salesforce fields and behavior for each field when exporting.
5. Configure Salesforce Filtering which enables your organization's users to view and filter records found in Salesforce right within ZoomInfo Advanced Search.
6. Turn on the integration for your users and enable them to begin exporting.
7. Understand how duplicate checking logic and data sharing with ZoomInfo works.

Export Preference Connection Options

As the admin setting up the initial integration with Salesforce, you must configure how you connect to Salesforce to support exports from ZoomInfo. This section describes your connection options and other considerations.

You have two options:

- Service Account Connection (Default)
- Individual User Account Connections

Service Account Connection (Default)

The default (and preferred) option is to use a service account to connect your organization's users.

A service account simplifies the onboarding process as your organization evolves and changes, and eliminates the need for your Support team to troubleshoot individual Salesforce connection issues for your users.

The Basics

- As a best practice, utilize a Salesforce integration user as described in the Salesforce documentation. However, any Salesforce user account that has the required Salesforce permissions as well as admin access in ZoomInfo can be used as the service account connection.
- All exports and Salesforce Filtering jobs will be run using this account.

- Other ZoomInfo admins and users will not need to connect to Salesforce using their own credentials.
- Assuming your org's ZoomInfo user accounts match to Salesforce user accounts, exports will be associated with the user that made the export, including any applicable lead assignment rules you've configured in Salesforce.

Primary Connected Admin and Secondary Admins

Primary Connected Admin

- The ZoomInfo admin that makes the initial connection to Salesforce is considered the *primary connected admin*.
- Only the primary connected admin can disconnect the connection to Salesforce.
- Any other ZoomInfo admins defined in your organization can manage the configuration settings such as adjusting mapping, export settings, and filtering. However, these admins cannot directly disconnect the connection to Salesforce.

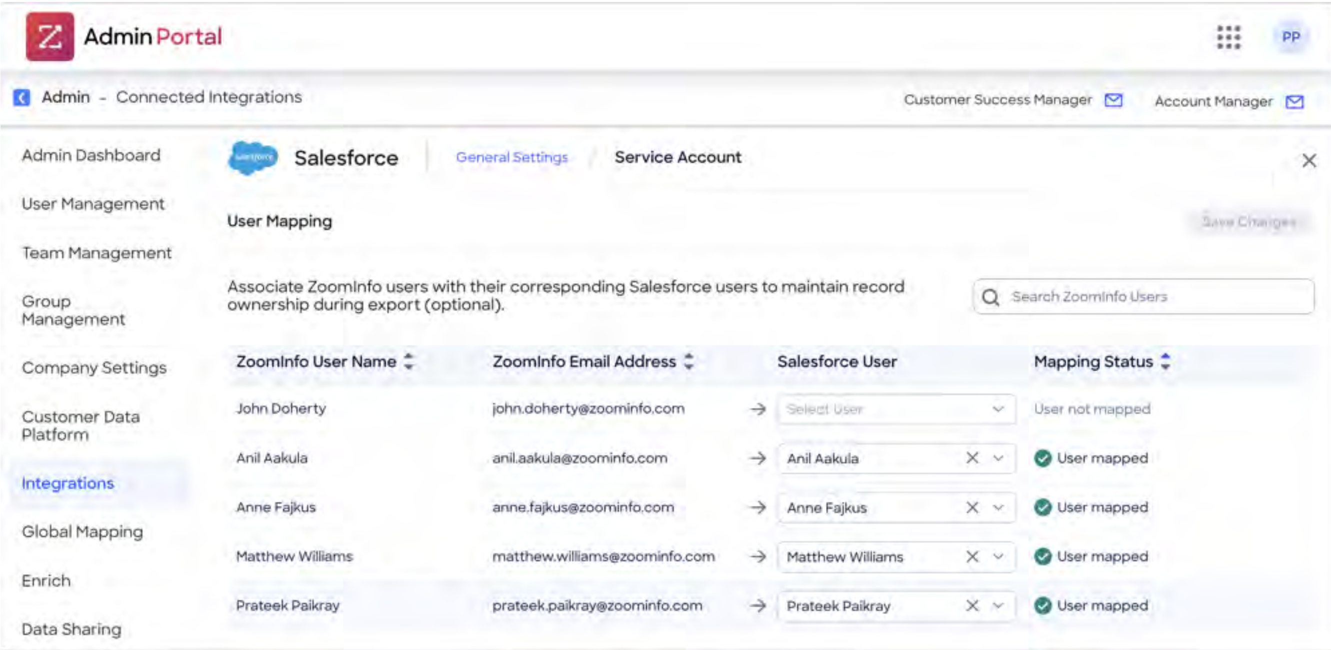
Secondary Admins

Any other ZoomInfo admins defined in your organization are considered a secondary admin. These admins:

- Can view the existing Salesforce integration configured for the org without connecting their own Salesforce account to Zoominfo.
- Can manage the configuration settings such as adjusting mapping, export settings, and filtering.
- Can disable all exports for users by toggling off the connections.
- Can switch the service account user by using the **Change User** option on the **General Settings** page for the integration (Service Account option only). Ensure the new service account user has the same set of Salesforce permissions as the previous user.
- Cannot directly disconnect the connection to Salesforce. However, a secondary admin can become the primary admin by using the **Change User** option on the **General Settings** page for the integration.

ZoomInfo and Salesforce User Account Mapping

It's important that your ZoomInfo users map to Salesforce users to ensure proper record ownership assignment when using the Service Account connection option. This important aspect preserves ownership in Salesforce for net-new records exported from Zoominfo. We provide a simple UI for an admin to review this mapping on the integration settings page.



Record Ownership When Exporting Using a Service Account Connection

Here's how record ownership logic is applied when exporting using the Service Account connection option.

If the exporting user's email address in ZoomInfo is the same as their Salesforce user email address:

- ZoomInfo will automatically associate exports of net new records with the user that performed the export.
- The record owner for net new records exported will be set to the user account that performed the export.
- The **Created By** and **Last Modified By** value for each record will reflect the primary connected admin.
- If your organization has configured lead assignment rules in Salesforce, the logic described in [Lead Assignment Rules] applies. Note the following:
    - If a user exports 25 net new records or less, the lead assignment rules will be used to set the record owner.
    - If a user exports 26 net new records or more, the lead assignment rules are not applied and the records will be owned by the user that performed the export.

If the exporting user's email address in ZoomInfo *does not match* their Salesforce user email address:

- The record **Owner**, **Created By** and **Last Modified By** fields will reflect the primary connected admin.
- If your organization has configured lead assignment rules in Salesforce, the logic described in Lead Assignment Rules applies. Note the following:
    - If a user exports 25 net new records or less, the lead assignment rules will be used to set the record owner.
    - If a user exports 26 net new records or more, the lead assignment rules are not applied and the records will be owned by the primary connected admin.
- If this logic presents an issue for your organization, you can choose the Individual User Account Connections option instead. This will require your organization's users to individually connect to Salesforce.

Individual User Account Connections

Select the **User Account** option and require each of your organization's users to connect to Salesforce in order to enable the ability to export.

- Ensure that your org's users have the required permissions in Salesforce.
- You'll still need to make the initial admin connection for the integration using Salesforce credentials.

Primary Connected Admin vs. Secondary Admins

The same functionality described in the Primary Admin and Secondary Admins apply to the User Account option with the exceptions noted.

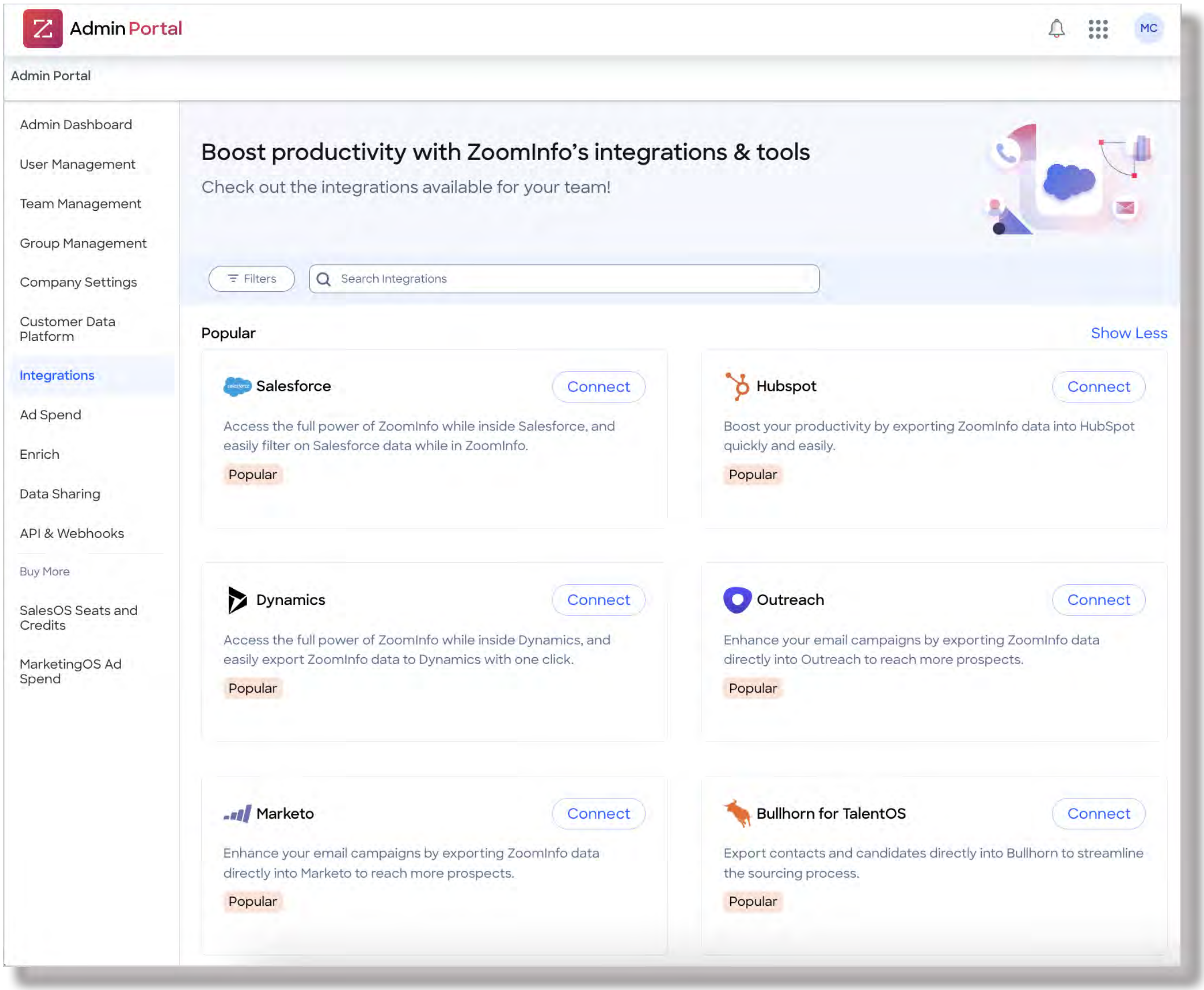
Required User Connections

To be able to export from ZoomInfo to Salesforce, each user must connect to Salesforce using their own credentials.

- Once you have enabled the integration for all users by clicking the toggle to the left of the integration in the Admin Portal, individual ZoomInfo users can connect to Salesforce.
- Admins should share the following link with users for instructions on how to connect to Salesforce.

Get Connected

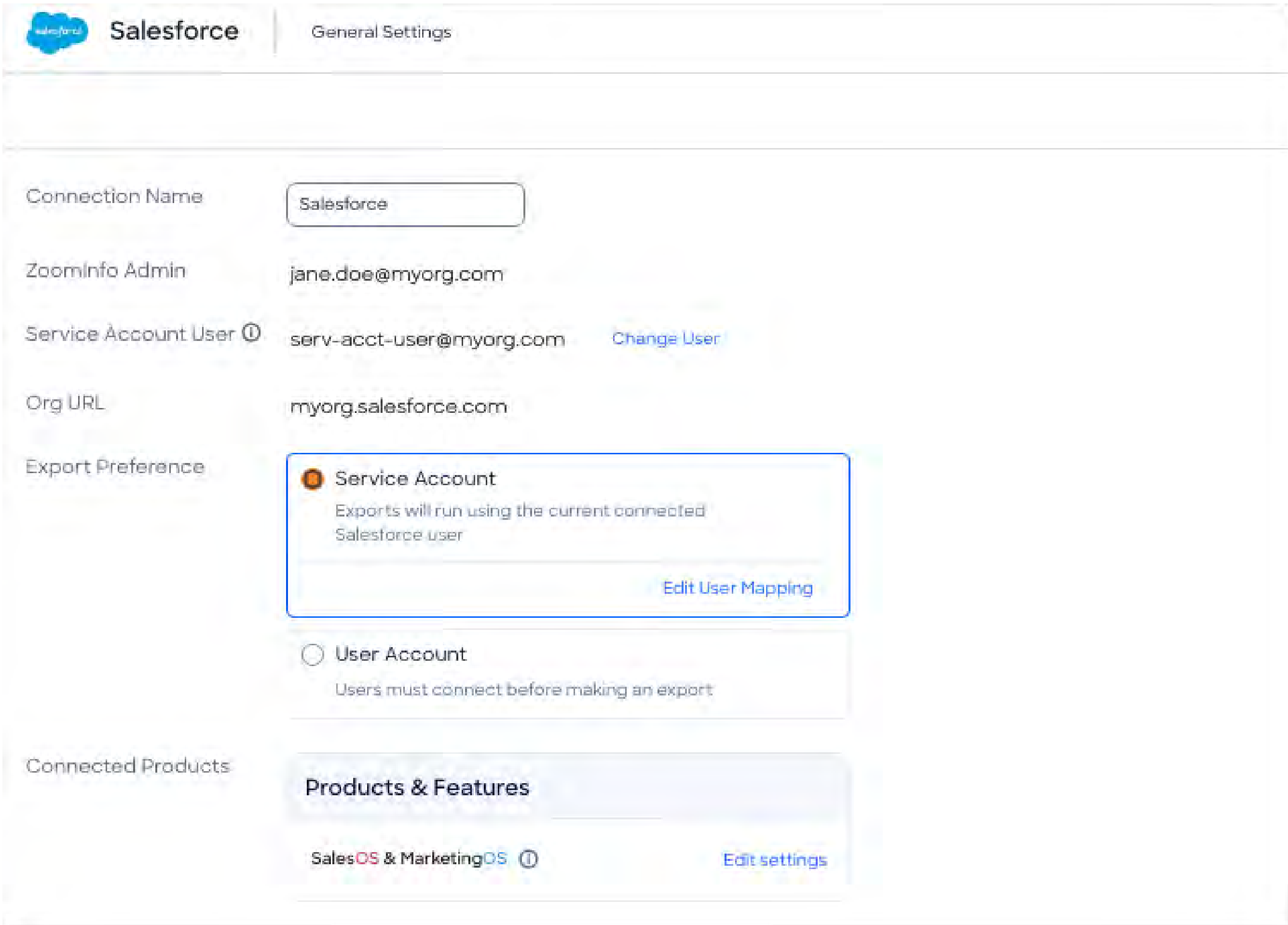
1. Login to ZoomInfo and select **Admin Portal** from the waffle menu.
2. Click **Integrations**.



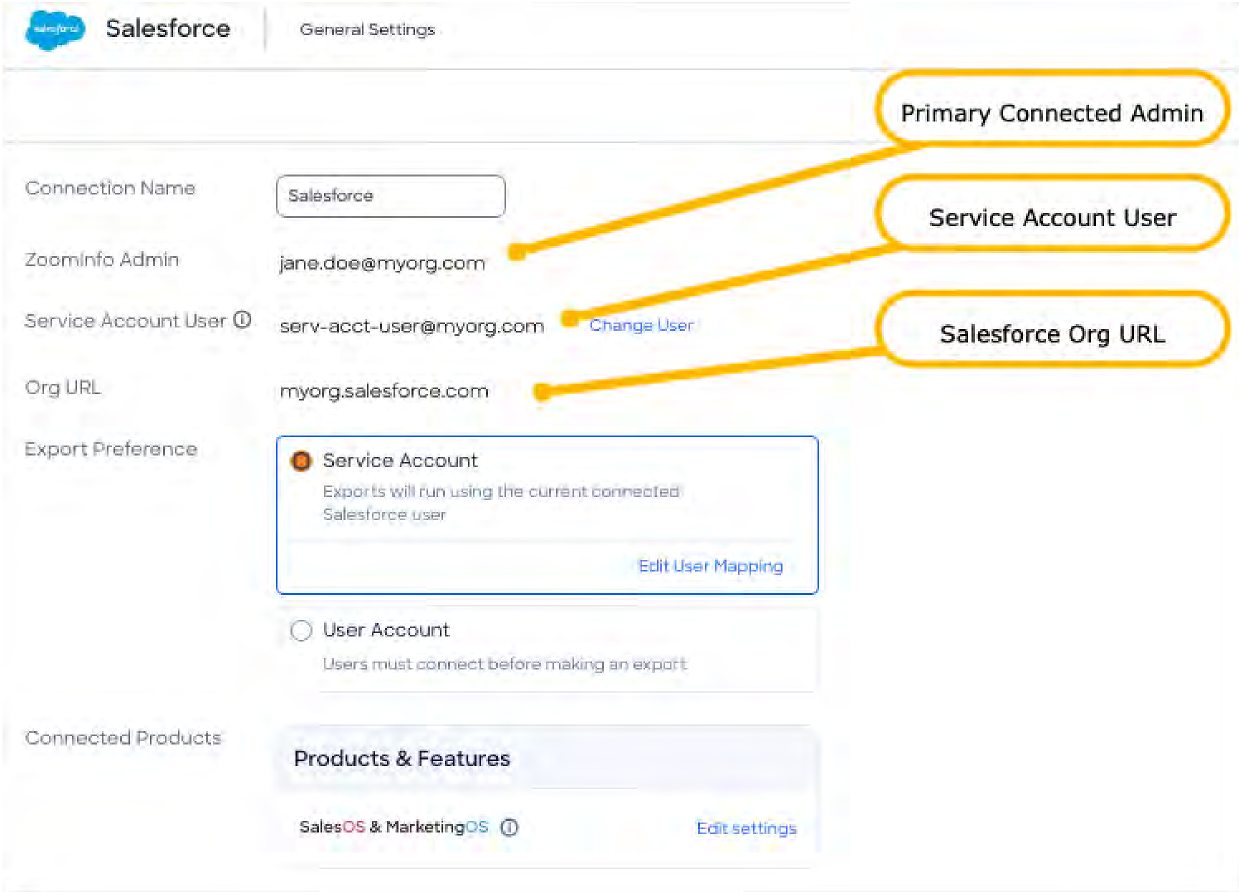
3. Find the Salesforce integration and click **Connect**.
   - The **Service Account** is the default preference. Therefore, when you make this connection, the Salesforce credentials you provide will be set as your **Service Account**.
   - As the admin setting up the initial connection, your ZoomInfo account will be listed as the **ZoomInfo Admin** (and considered the primary connected admin).
   - You can alternatively change the default preference of **Service Account** to **User Account** after making the initial connection.

4. Enter your Salesforce credentials.

   Click **Edit Settings** on the success message to be directed to the **General Settings** page for the Salesforce integration.

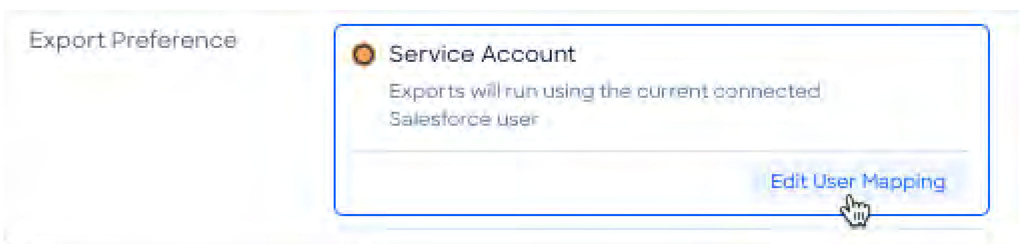


5. Note that your ZoomInfo account is listed as the **ZoomInfo Admin**, the **Service Account User** is the account with which you connected the integration, and the **Org URL** reflects your Salesforce org instance.

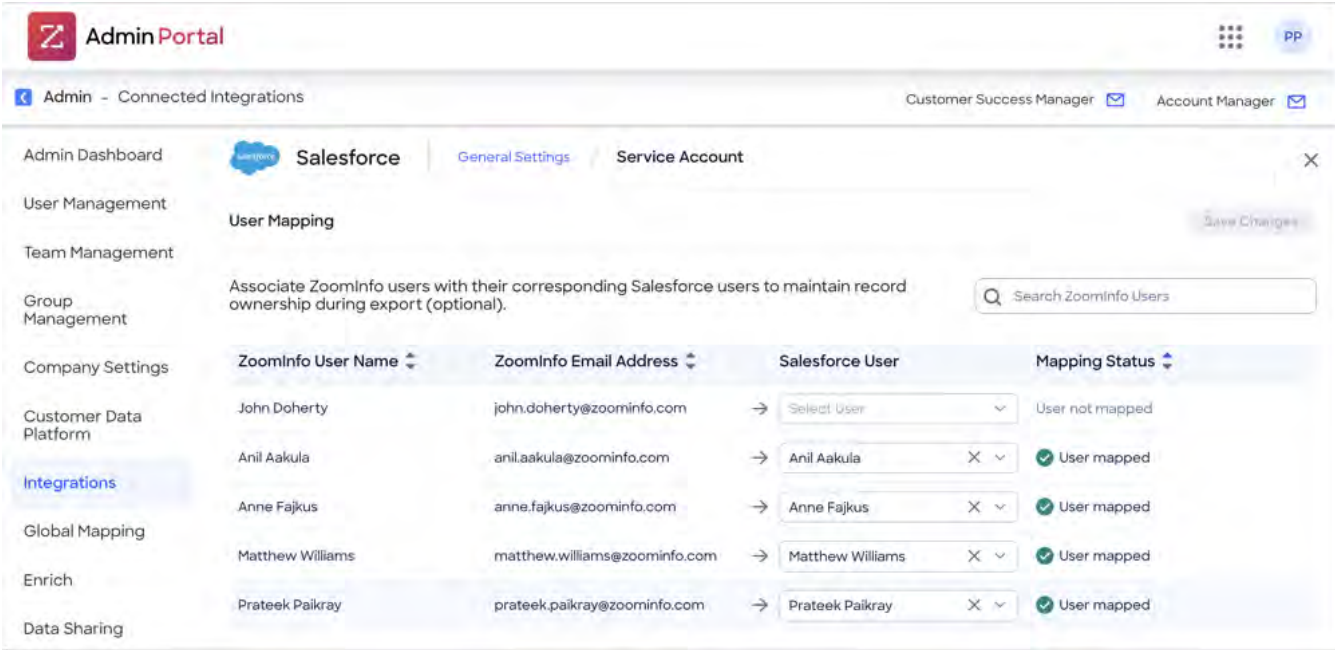


6. Decide whether you'll use the default **Service Account** option, or change to the **User Account** option. If you select the **User Account** option, go to step 7.

    a. Assuming you choose to use the default **Service Account** option, click **Edit User Mapping**.

    The **User Mapping** page displays.



ZoomInfo attempts to map each ZoomInfo user to a corresponding Salesforce user using the **ZoomInfo Email Address**. If this is not successful, we attempt to match the ZoomInfo user using the user's full name in Salesforce.

- Typically, you should see correct user mappings assuming your org's users use the same email address for both ZoomInfo and Salesforce.
- If the **Salesforce User** field does not have a user selected, click the dropdown and select a user.
- If the Salesforce user field has multiple matches, choose the appropriate user.

b. If you've made updates to the **User Mapping** page, click **Save Changes**.

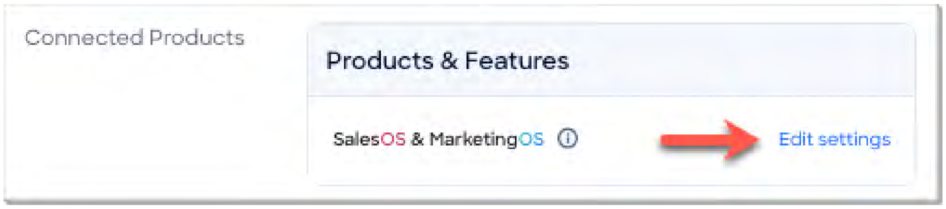
c. Continue to [Configure Export Settings](#).

7. If you elect to use the **User Account** option, you've already connected to Salesforce and must finish configuring the integration (e.g., export settings, mapping, and Salesforce Filtering). Continue to [Configure Export Settings](#).

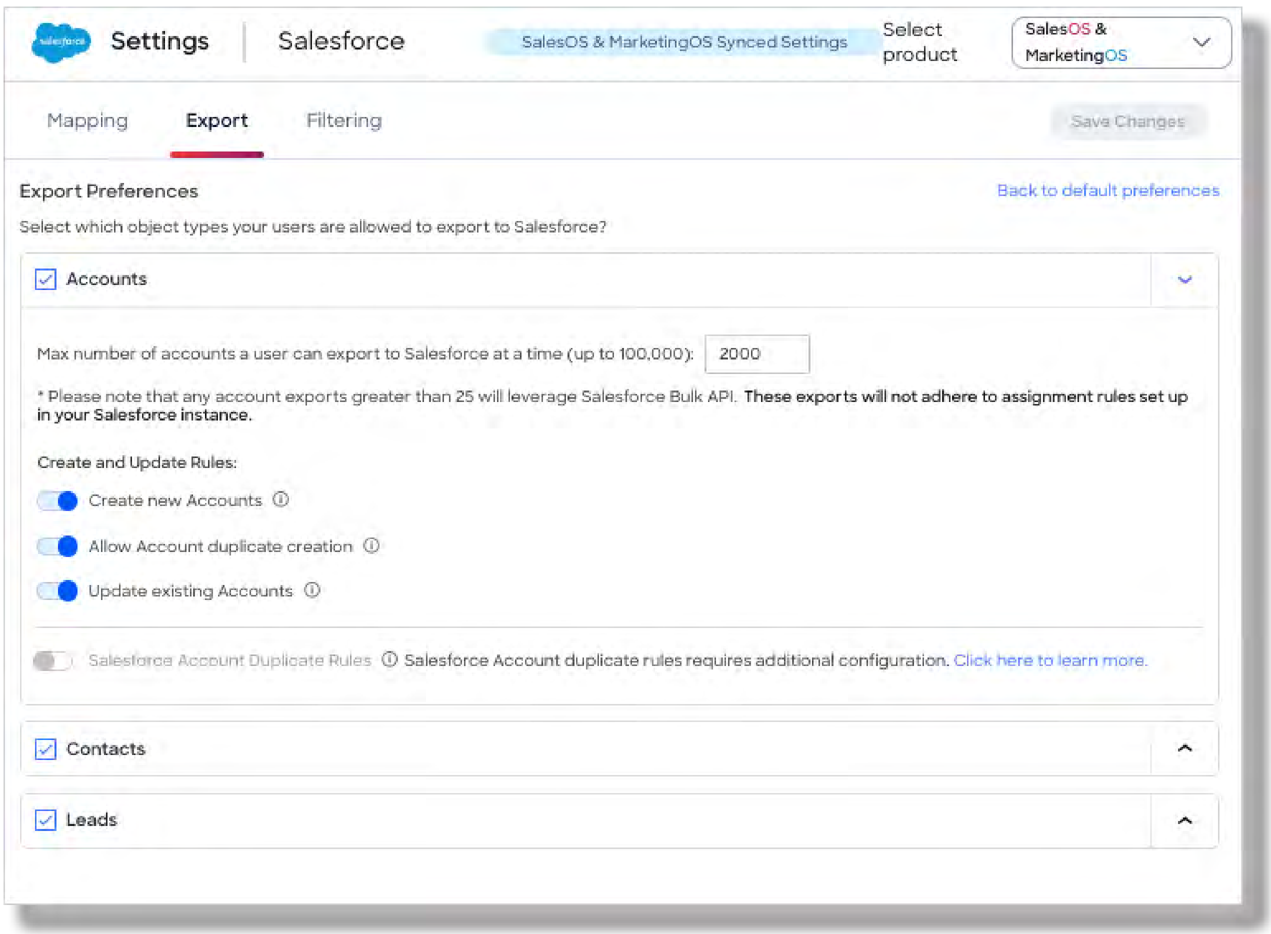
Configure Export Settings

With your integration successfully connected (but not yet turned on for your organization), you can configure export preferences and limit the objects that can be exported.

1. From the **General Settings** page for the integration, select **Edit settings**.



2. Click the **Export** tab.



3. Select each object type you want your users to be able to export to Salesforce.

4. For each object type, set a maximum number of records a user can export to Salesforce at one time (up to 100,000).

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

API Consumption and Behavior

For exports of 25 records or less: Exporting 25 records or less leverages the Salesforce REST API.

For exports of 26 records or more (max 100,000): Exporting 26 or more records (max 100,000) requires Salesforce Bulk API access.

The following table models API consumption when your users export ZoomInfo records to Salesforce.

Total Records Exported From ZoomInfo To SFDC	Records To Be Created in SFDC	Records To Be Updated In SFDC	SFDC Rest API Consumption	SFDC Bulk API Consumption	Notes
25	25		1	-	
25	10	15	2	-	See footnote[1]
200	200		-	1	
200	100	100	-	2	See footnote[2]
201	201		-	1	
201		201	-	1	
201 to 100K	201 to 100K		-	1	
201 to 100K		201 to 100K	-	1	

Important Native App consideration: Unlike the direct integration with Salesforce from the ZoomInfo platform, the Native App does not leverage the Salesforce Bulk API when performing exports. For this reason the export limit through the Native App is 5,000, not 100,000.

[1] In this example, 1 REST API call is made to create 10 records, and 1 REST API call is made to update 15 records.
[2] In this example, 1 Bulk API call is made to create 100 records and 1 Bulk API call is made to update 100 records.

Lead Assignment Rules

For exports of 25 records or less: Exporting 25 or fewer records as leads, the lead assignment rules in your Salesforce system will be activated, but this only applies if new records are added to the system.

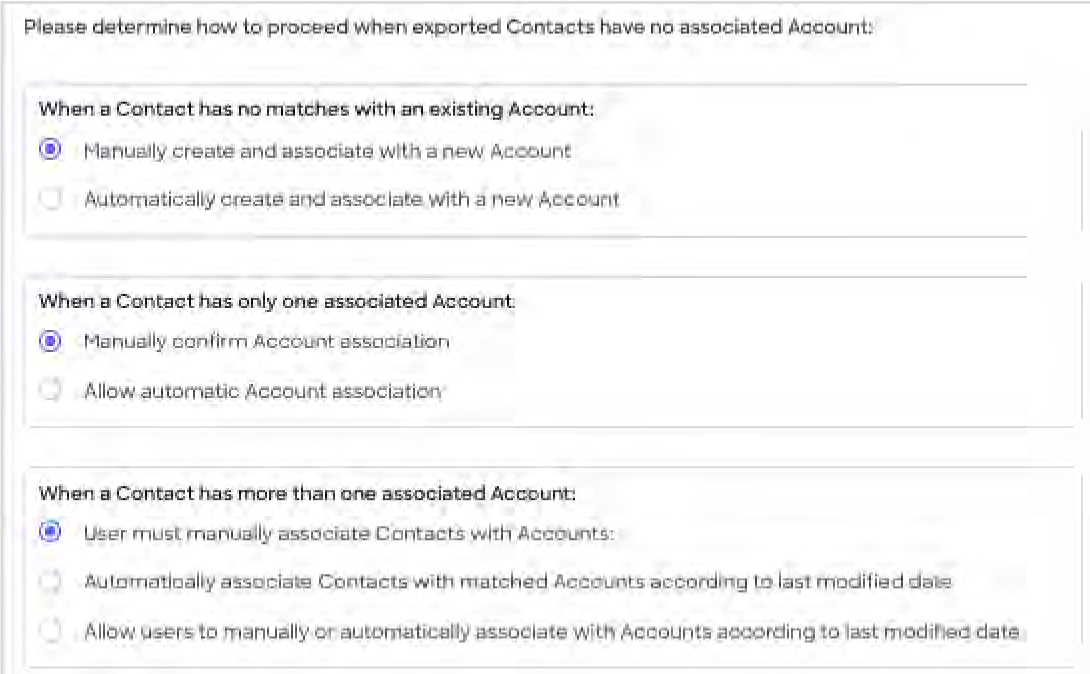
For exports of 26 records or more (max 100,000): Exporting 26 or more records as leads, the lead assignment rules in your Salesforce system will not be activated.

The following table illustrates how lead assignment rules are triggered when your users export ZoomInfo contacts to Salesforce as leads.

Total Records Exported From ZoomInfo To SFDC	Records To Be Created in SFDC	Records To Be Updated In SFDC	Lead Assignment Rules Triggered?
25	25		Yes
25	10	15	Yes In this example, if records are exported as leads, then lead assignment rules will be triggered for only the 10 records created
26 or more	26 or more		No
26 or more		26 or more	No

Account Association When Exporting Contacts

For the Contacts object, you have a few options in how account association logic is applied when your organization's users export ZoomInfo contacts to Salesforce.



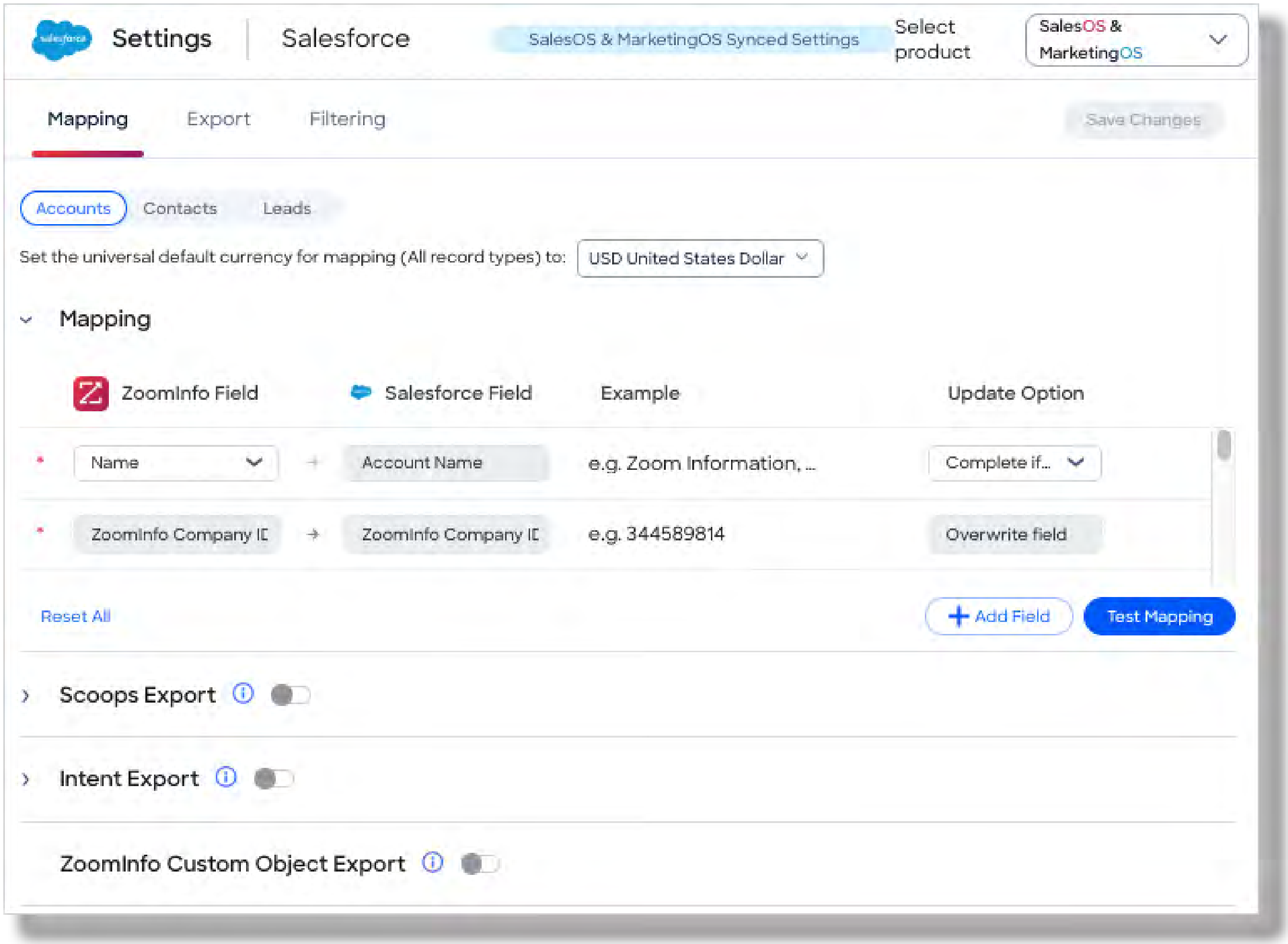
ZoomInfo recommends that you set account association options to "manual" (which is the default for all three options), and let the user determine the account association when exporting 26 or more contacts. Using these options:

- If an account does not exist, the user is asked to confirm the creation of the account. If confirmed, ZoomInfo will assign the contact to the newly created account.
- If only one account exists, the user is asked to confirm that they want to associate the contact with that account.
- If we match on multiple accounts, the user is asked to choose the account with which they want to associate the contact.

Configure Mapping

With your integration successfully connected (but not yet turned on for your organization), you can configure and customize mapping and optionally enable Scoops, Intent, and ZoomInfo Custom Object exports.

1. Click the **Mapping** tab.



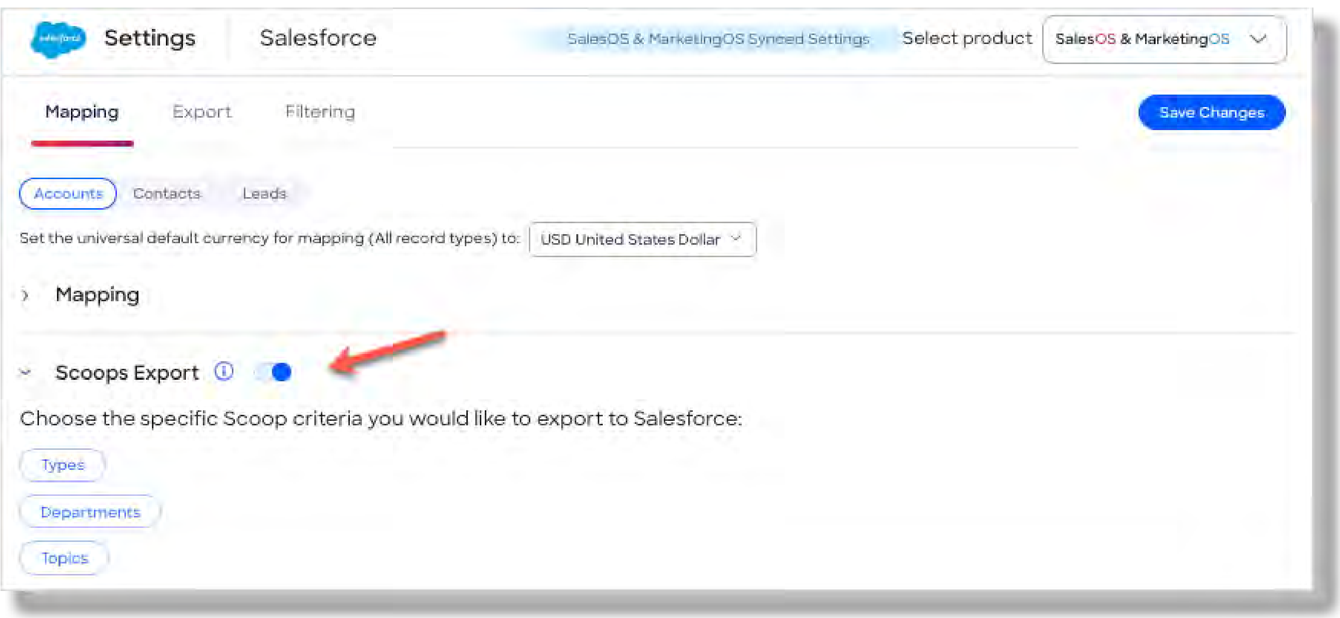
Note: The gray fields shown above are only included if you've installed the [Salesforce Native Application](#).

2. On the **Mapping** tab, use the **Accounts**, **Contacts**, and **Leads** tabs to review the default mappings for each object type and make any mapping changes.

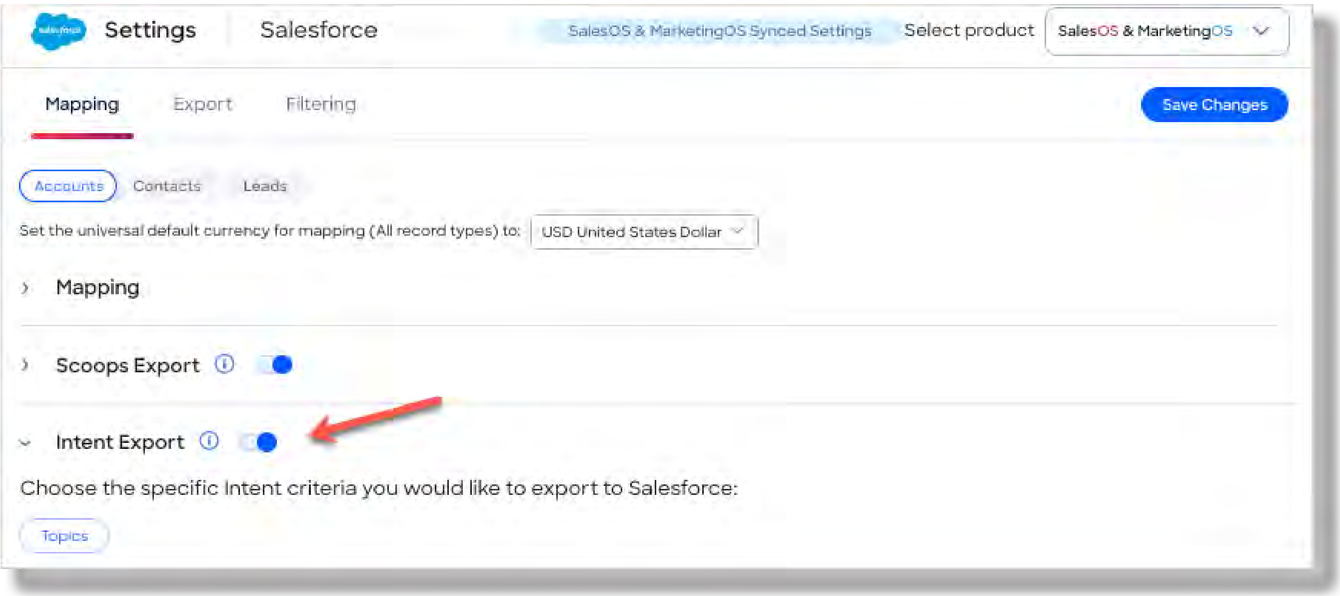
Field	Description
ZoomInfo Field	Available ZoomInfo fields. Required fields are marked with an asterisk (*).
Salesforce Field	Available Salesforce fields. These fields are retrieved directly from your Salesforce instance.
Update Options	Select an option: ● **Complete if missing** (default) - Only complete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

Configure Scoops and Intent Exports

On the **Mapping** tab, you can export Scoops (at the account and lead level) to Salesforce.



You can also export Intent (at the account level only) to Salesforce.



ZoomInfo Custom Object Export requires that you've installed the [Salesforce Native Application](#) (version 1.22 or higher). Two custom objects are available in Salesforce:

- ZoomInfo Scoops
- ZoomInfo Intent

These custom objects are related objects on the account, contact, or lead record. You can customize the fields that you want to show or hide, such as create date, description, topic, Scoop ID, and so on.

Add or Remove Fields

Add fields by clicking **Add Field** 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.

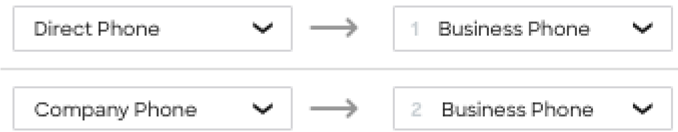
Set a Hierarchy for ZoomInfo Data Within a Single Salesforce Field

In some cases, you may want multiple ZoomInfo fields to be stacked hierarchically within a single Salesforce field.

For example, you may want to import both the ZoomInfo Direct Phone and Company Phone fields into the Salesforce Business Phone field.

1. Map **Direct Phone** to **Business Phone**.
2. Map **Company Phone** to **Business Phone**.

The first occurrence of the **Business Phone** field is denoted with number 1, and the second with number 2.



Field hierarchy allows for both first and second choice values for selected Salesforce properties. For exported records where more than one data point is available from ZoomInfo (such as phone numbers) you can prioritize the data by preference within your mapping.

Test and Save

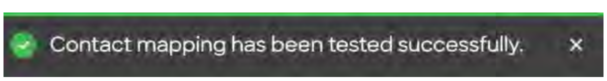
Before saving your mapping changes, click **Test Mapping** to export and delete a test record using your current settings.

- 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.

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

- If the test is successful, a notification displays.

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

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

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

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

Configure Salesforce Filtering

Organizations with Salesforce Filtering can use this feature to configure the filtering of account, contact, lead, and opportunity objects from Salesforce to ZoomInfo, enabling their ZoomInfo users to see Salesforce ownership data on contact and company profiles within ZoomInfo. ZoomInfo users can utilize this information to refine their ZoomInfo searches to find new prospects faster.

- To utilize Salesforce Filtering and Insights, Bulk API access is needed.
- For details on how data privacy works when using filtering, see the CRM/MAT Filtering Data & Privacy FAQ.

User Experience

Before configuring Salesforce filtering, it's important to understand the capabilities you are enabling for your organization's users.

Once you configure and run Salesforce filtering, ZoomInfo users can use the Salesforce filters in Advanced Search to search for account, contact, and lead records using the following criteria:

- **Account records**: Include or exclude based on account ownership or account type. You can also filter accounts based on Opportunity data in Salesforce.
- **Contact records**: Include or exclude based on contact ownership with an option to exclude contacts who have opted out of email.
- **Lead records**: Include or exclude based on lead ownership and status with an option to exclude leads who have opted out of email.

With the filtered Salesforce data, users can:

- Include all owners to see all of the records matched from Salesforce, or exclude all records matched from Salesforce.
- Select up to 10 owners for each object type when filtering.
- Create saved search alerts based on Salesforce ownership, helping users maintain a narrow focus on prospecting efforts.
- See indicators that a record exists in Salesforce in search results.
- See additional indicators on ZoomInfo contact and company profile pages, including owner information and filter date. Clicking on the owner name will redirect to the existing Salesforce record in a new tab.
- See indicators that a record exists in Salesforce when viewing Scoops and Org Charts.

Key Considerations

Choose which objects to filter

As an admin setting up Salesforce filtering, you can choose to configure filtering of accounts, contact and/or lead objects.

Per object limits

For the account, contact, and lead object types, there is a limit of 2 million records. For opportunities there is a limit of .5 million records. You can adjust your filtering settings using Salesforce Lists to adhere to these limits.

API consumption

Salesforce filtering functions by leveraging Salesforce's Bulk API. Salesforce provides a limit for the number of API calls which can be used by an organization.

- Salesforce records are queried using the Bulk API in batches of 10,000. So 1 million records will consume 100 Bulk API calls.
- Check with Salesforce Support to confirm how many API calls your organization has access to (daily limits).
- Consider other integrations that you are leveraging (including ZoomInfo Enrich) which also use Salesforce's API.

Disabling filtering for an object

If you subsequently disable filtering for an object, previously-filtered records are not deleted - disabling simply stops future filtering.

Clearing filtered records

If you want to remove records that are already filtered, you have the option to clear them so they no longer appear in searches and remove Salesforce indicators. Clearing filtered records only removes the ownership information in ZoomInfo - your Salesforce records are not impacted.

Record persistence

Salesforce filtering will only persist the records ZoomInfo is able to match.

Duplicate records

If there are multiple records for the same account, ZoomInfo will only match to one record. For example, your Salesforce instance may include multiple or duplicate accounts across different locations. In this case, these records would be matched to a single ZoomInfo profile.

For exports under 25 records: To avoid creating duplicate records in Salesforce, ZoomInfo also checks for records synced through the Salesforce Filtering process (in case the ZoomInfo duplicate check fails to detect a match). This check applies to all contact, lead, and account export flows.

Changes to records in Salesforce

Only records that meet specified criteria at the time of filtering are filtered. Records that no longer meet the criteria are removed on subsequent filtering runs. For example, if a lead is converted to a contact, it will no longer be filtered as a lead in future filtering runs.

Scheduled runs

Scheduled filtering runs are performed on "off hours", specifically from 8PM to 6AM EST.

Salesforce report creation best practices

When selecting or creating reports to include in Salesforce Filtering:

- Choose reports that align with specific goals and objectives for your organization
- Select up to 20 reports for import and filtering purposes
- Ensure that reports do not include more than 2,000 records. If a report has greater than 2,000 records that you want to import, split the report into individual reports to meet this requirement.

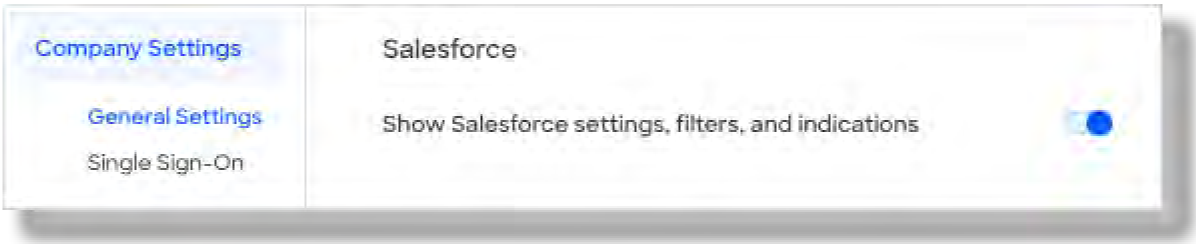
Include the following essential data fields for accurate matching with ZoomInfo's database and optimized filtering.

Accounts	Contacts	Leads
Account ID Account Name Account Website Account Owner Account Type ZoomInfo Company ID*	Contact ID First Name Last Name Email address Email Opt Out ZoomInfo Contact ID*	Lead ID First Name Last Name Email address Company Name Email Opt Out ZoomInfo Contact ID*

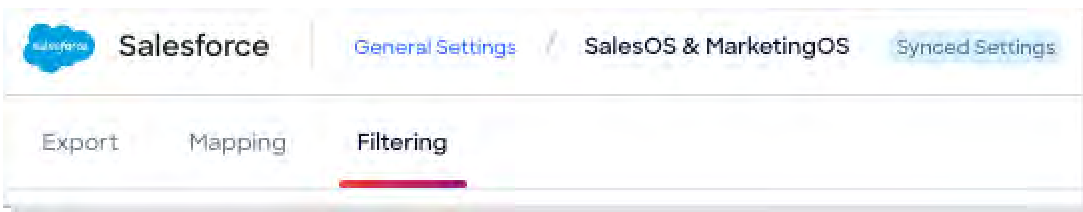
* Available if the ZoomInfo Salesforce Native App is installed.

Configure Salesforce Filtering Preferences

1. Go to **Admin Portal > Company Settings > General Settings**.
2. Enable the **Show Salesforce settings, filters, and indications** toggle for Salesforce.



3. Go to **Admin Portal > Integrations**.
4. On the **Connected** tab, click Salesforce and select **Edit Settings**.
5. Click the **Filtering** tab.



Configure Settings for Each Object Type

For each object type (**Account**, **Contact**, **Lead**), you can choose which Salesforce records to filter.

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*For simplicity, this section describes your options in the context of the **Account** object, but the same instructions apply for **Contacts** and **Leads**.*

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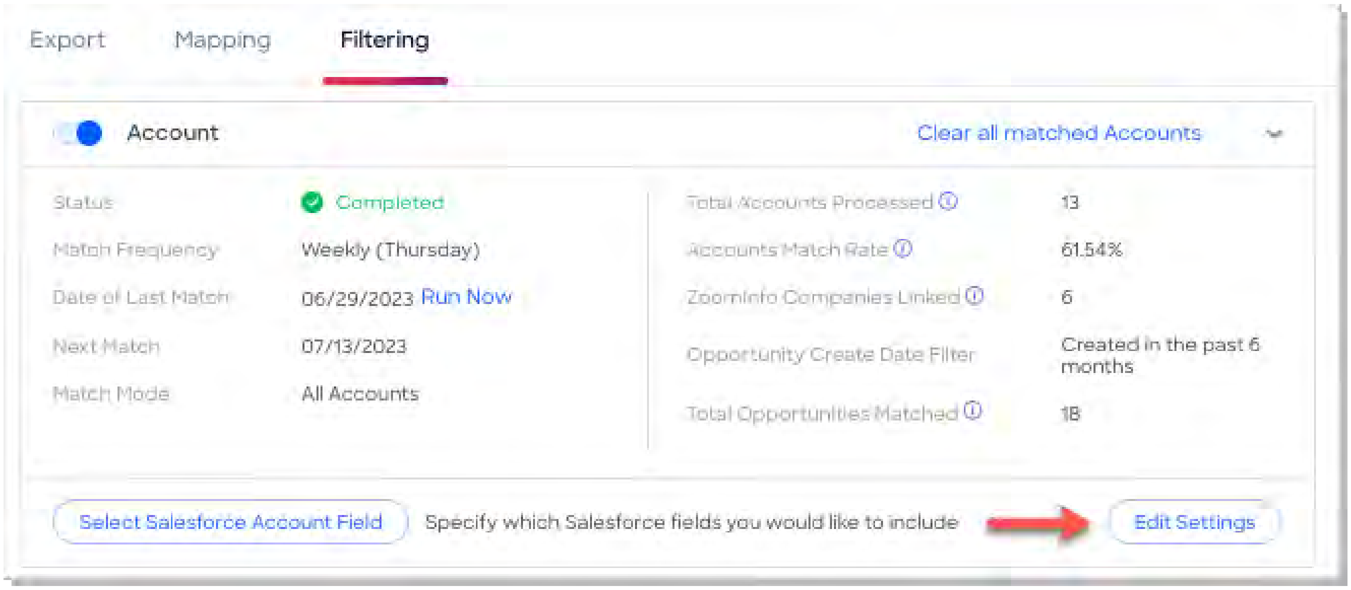
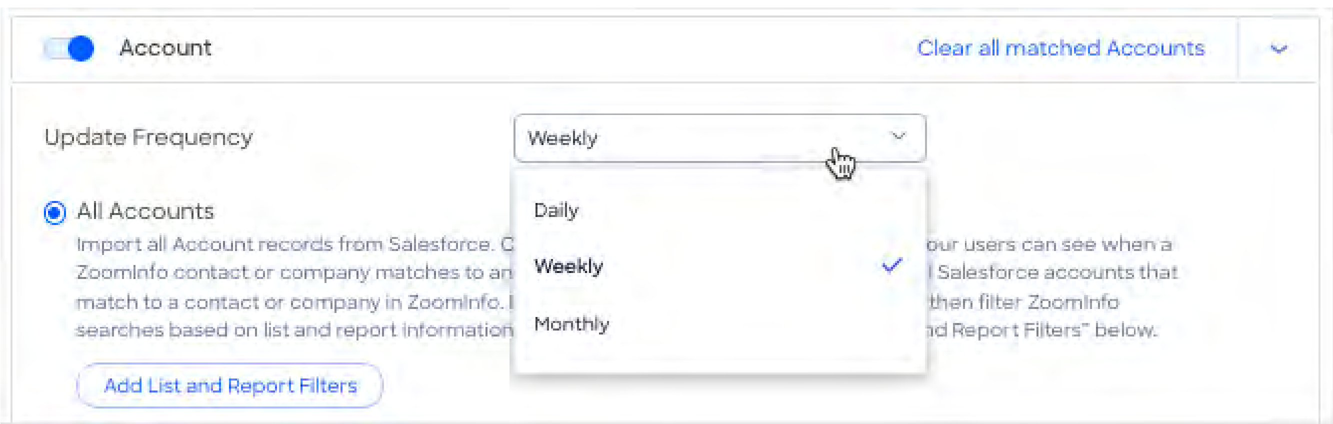
1. Click the toggle to enable and configure filtering for the object (e.g., **Account**).
2. Click **Edit Settings** for the selected object.



Choose the Update Frequency

Use the **Update Frequency** dropdown to schedule filtering for the object type.

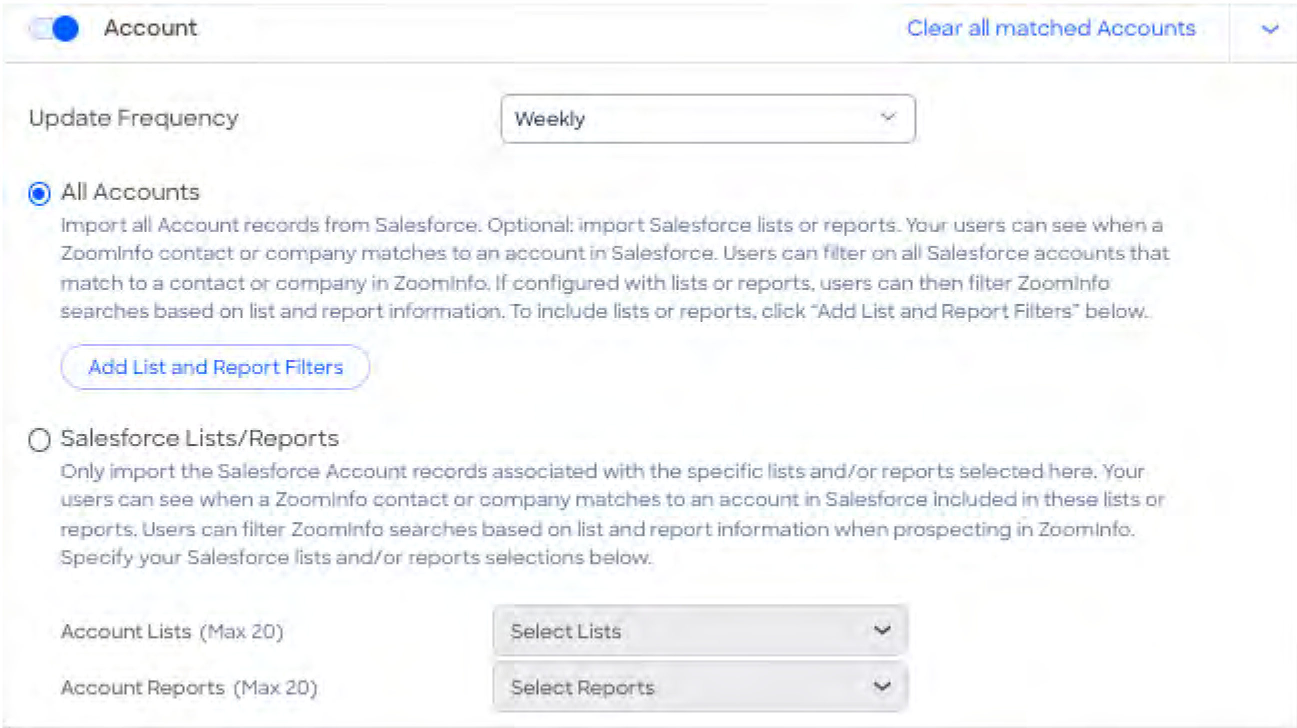


If you choose **Daily**, a full sync will occur once per week, beginning on the day you set it up, and recurring each week on that same day. For the days of the week in-between, only new records or updated fields for existing records are synced.

You can perform a full sync at any time by choosing the **Run Now** option on the **Mapping** tab for an object.

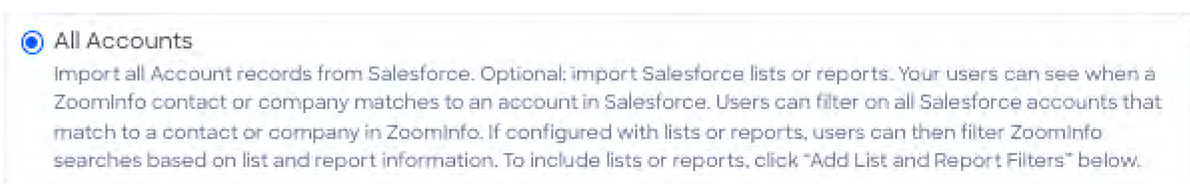
Specify Records to Import

For each object, you can configure the records you want your users to be able to search for in SalesOS.

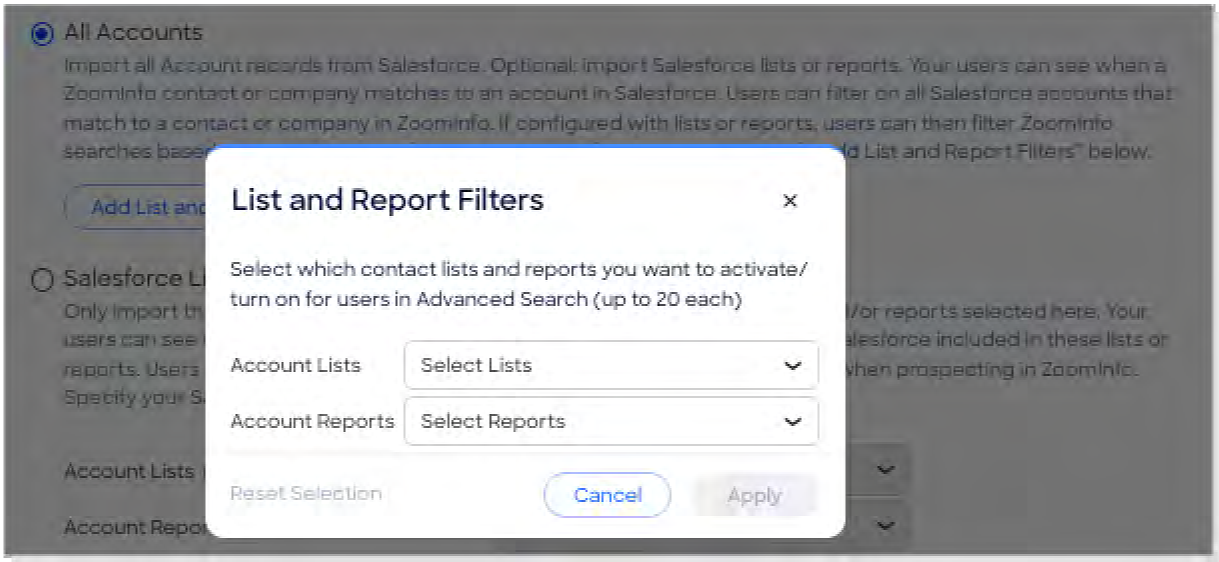


You have the following options to define the records to import:

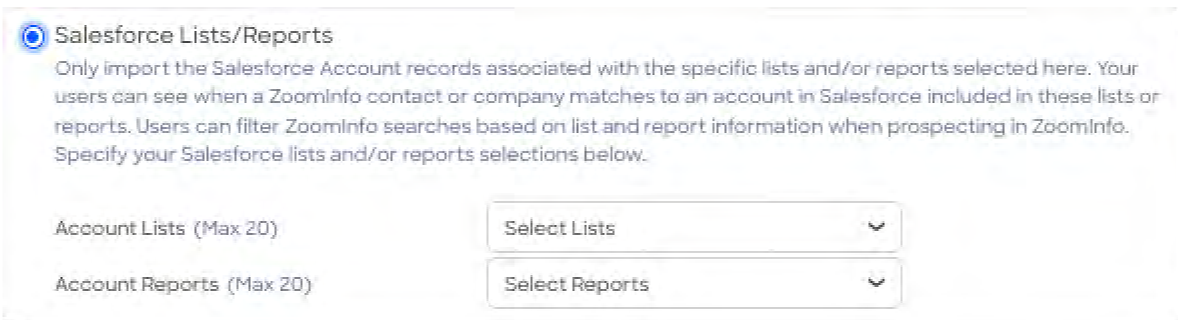
- **All Accounts** from Salesforce along with the option to include **Salesforce Lists/Reports** that you select.
    - If you choose **All Accounts**, users will be able to filter ZoomInfo search results for all accounts in Salesforce that match to a company in ZoomInfo.



    - If you optionally select **Add List and Report Filters**, users will also be able to filter ZoomInfo search results based on list and/or report information.



- Alternatively, you can choose to include only records associated with **Salesforce Lists/Reports** that you select. With this option, users will be able to filter ZoomInfo search results based on Salesforce list and/or report information.



Tip: See Salesforce report creation best practices for your Salesforce reports to optimize matching and filtering.

Include Opportunities

You can choose to include Salesforce Opportunities created in the past 6 months, 1 year, or 2 years.

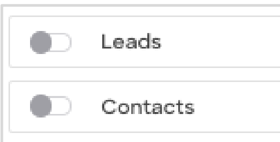
Verify and Save the Configuration

When done configuring the settings for an object (e.g., Accounts):

1. Click **Verify & Save**.
2. Repeat the configuration described in this section for other objects (Contacts, Leads) as needed.

Enable or Disable Filtering

Enable or disable filtering for an object type at any time using the toggle.



Clear Matched Records

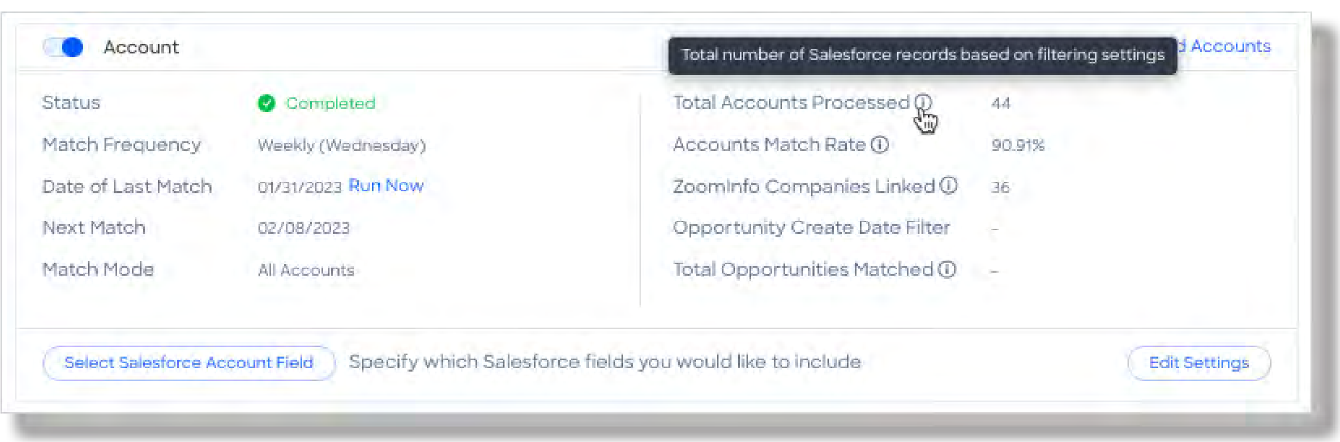
You can delete existing records that were previously filtered and matched to ZoomInfo. For example, click **Clear All Matched Contacts**.

Important: This action has no impact on records in your Salesforce instance - it simply removes records that were matched to ZoomInfo so that they will no longer be shown in search results.

Managing and Monitoring Filtering

At any time, you can return to the **Filtering** tab to view details about your runs, adjust settings, and enable or disable filtering. You can also manually initiate an off-schedule filtering run by clicking **Run Now**.

Run statistics are provided for each object. Roll over the info icons to view the definition of each statistic.



Salesforce Filtering Custom Field Support

Admins for organizations that use Salesforce filtering can add fields from Salesforce that they'd like to include as additional filtering options in ZoomInfo, helping to leverage data specific to an organization's instance.

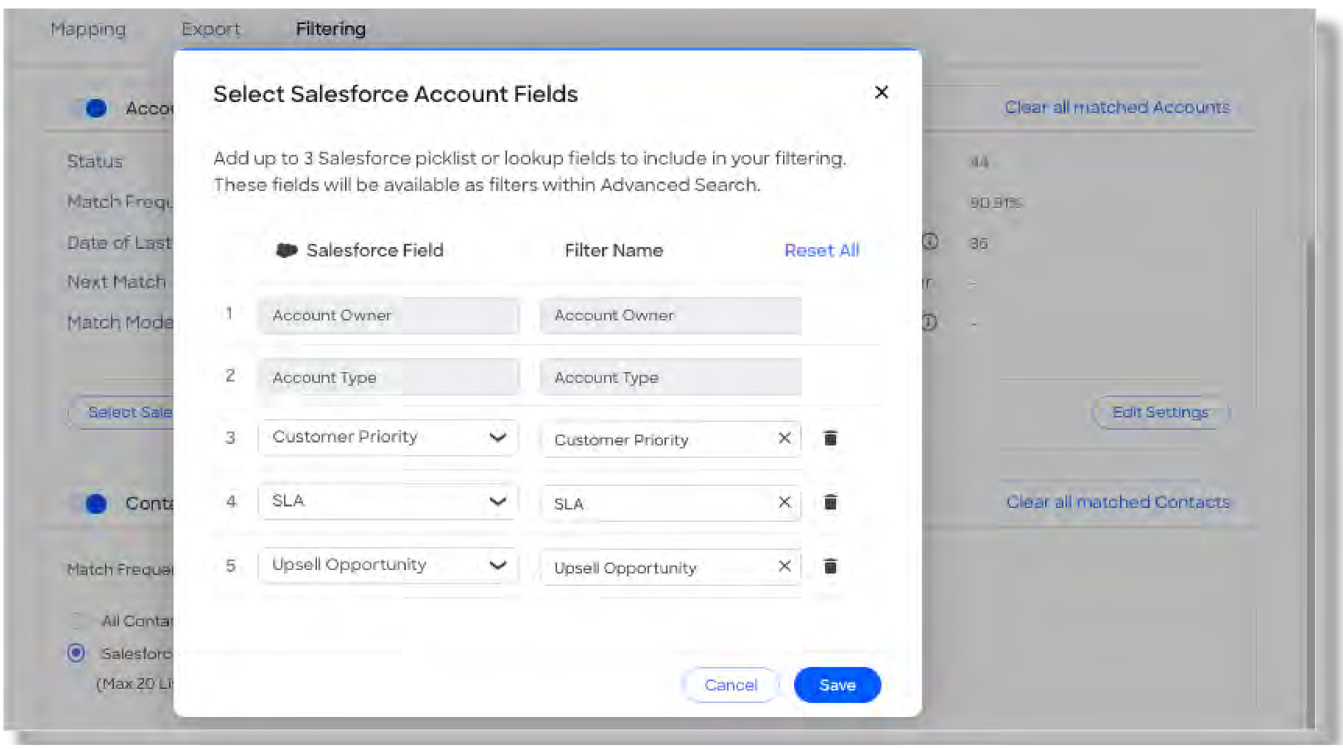
- Must be a Salesforce picklist or lookup field.
- You can add up to 3 fields for each object type (Accounts, Contacts, and Leads).
- You define the name for each custom filter that users will see in ZoomInfo Advanced Search.

Configure Custom Field Support

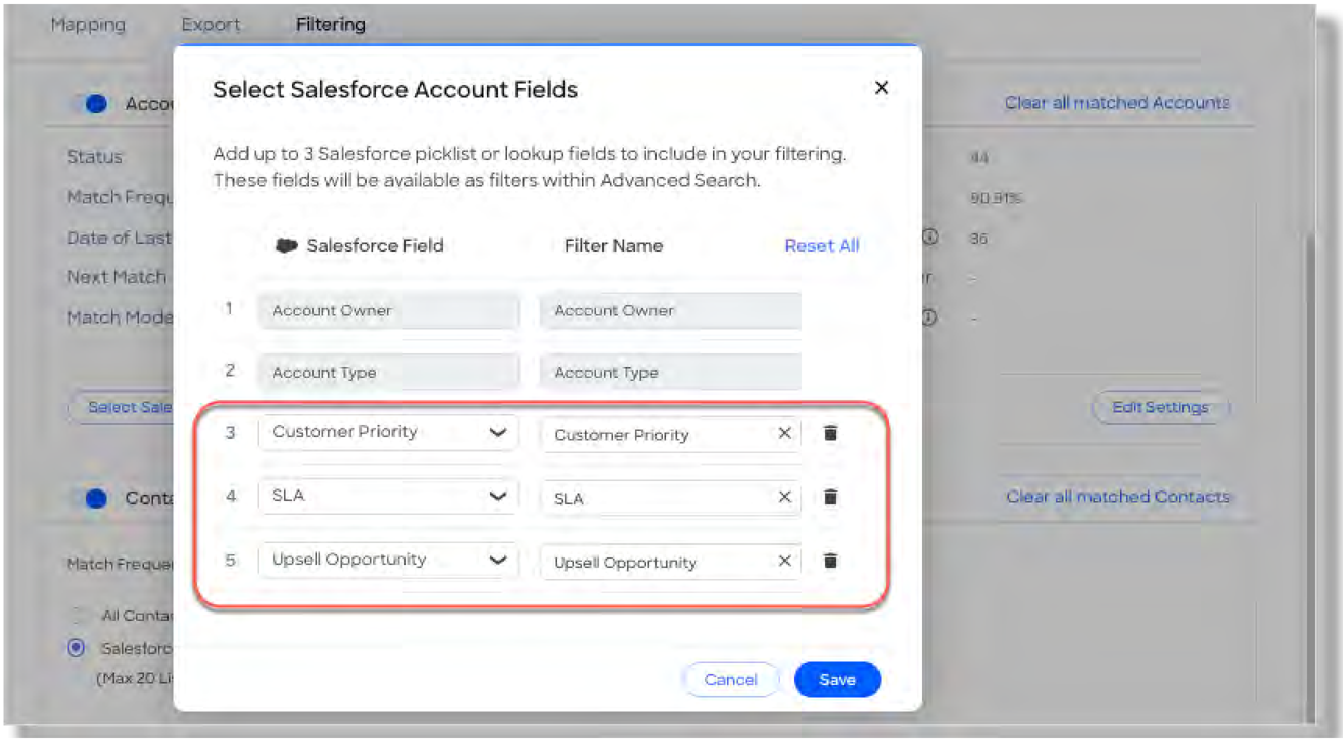
1. Navigate to **Admin Portal > Integrations** and select the **Manage** link for the Salesforce integration. The **Filtering** tab displays.

   In this example, we'll enable 3 additional fields for the Account object. Click **Select Salesforce Account Field**.

2. Add up to three Salesforce picklist or lookup fields to include by clicking the **Search Salesforce Field** dropdown.



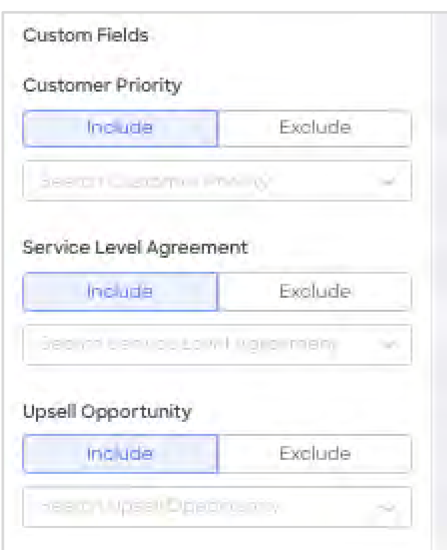
The **Filter Name** value for each custom field will display in Advanced Search. The default value is initially the same as the **Salesforce Field**. You can choose to edit this text so that it makes better contextual sense to users conducting searches.



3. When you've finished adding fields, click **Save**.
4. Continue to configure filtering for Contact and Lead objects as needed.

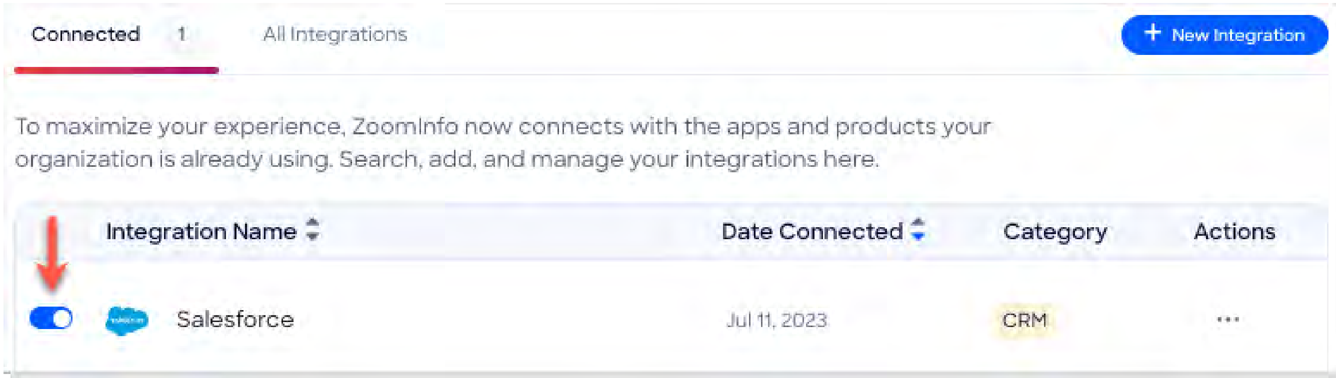
User Experience

When using Advanced Search, users can filter using the custom fields that an admin has configured.



Enable the Integration for Your Organization

Once you've connected and configured the integration, you can enable it for your users using the toggle.



- If you chose to use the default Service Account export preference, turning on the toggle enables the ability to export for all users in your organization.
- If you chose to use the User Account export preference:
    - Individual ZoomInfo users must connect to Salesforce with their own credentials to be able to export.
    - Admins should share the following link with users for instructions on how to connect to Salesforce.

Managing the Integration

Over time, you may need to make changes to your integration configuration - for example, if the primary connected admin leaves the company and you need to swap in a new admin.

Changing the Primary Admin (Service Account configuration)

If a secondary admin wants to remove the existing primary connected admin and make themselves the new primary connected admin:

1. Go to the **General Settings** page for the integration.
2. Ensure that the new admin has the same Salesforce permissions as the outgoing admin.
3. Click **Change User**. If the secondary admin is:
    - Already logged in to Salesforce in another browser or tab, the account is simply switched.
    - Not logged in to Salesforce, they'll need to authenticate using their credentials.

In this scenario, the Service Account user is also switched to the secondary admin's account.

Changing the Primary Admin (User Account configuration)

Changing the primary connected admin in this scenario only applies if your organization is using Salesforce Filtering. If a secondary admin wants to remove the existing primary connected admin and make themselves the new primary connected admin:

1. Go to the **General Settings** page for the integration.
2. Ensure that the new admin has the same Salesforce permissions as the outgoing admin.
3. Click **Change User**.

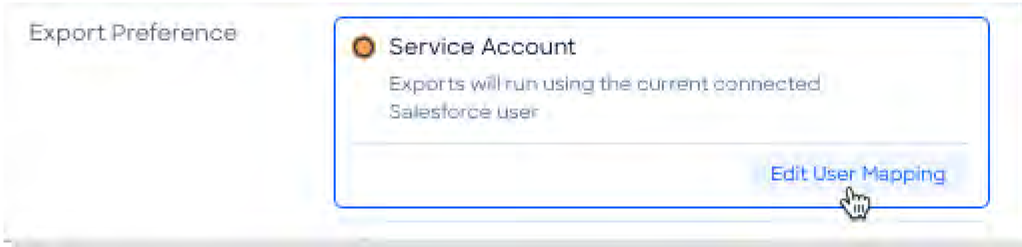
   Note: If Salesforce Filtering jobs are not configured, the secondary admin will not see the **Change User** option.
4. If the secondary admin is:
   - Already logged in to Salesforce in another browser or tab, the account is simply switched.
   - Not logged in to Salesforce, they'll need to authenticate using their credentials.

Switching from User Account Option to Service Account Option

If you're currently using the User Account option (or the previous experience that only supported individual user account connections) you can easily switch to the Service Account option:

1. Go to **Admin Portal > Integrations**.
2. On the **Connected** tab, temporarily turn off the integration for your organization using the toggle.
3. Go to the **General Settings** page for the integration.
4. In the **Export Preference** section, select the **Service Account** option.
5. Click **Save Changes**.

   Note: Saving the changes will enable the **Edit User Mapping** link.
6. Verify the user mapping configuration to ensure your org's users are mapped to Salesforce users by clicking **Edit User Mapping**.

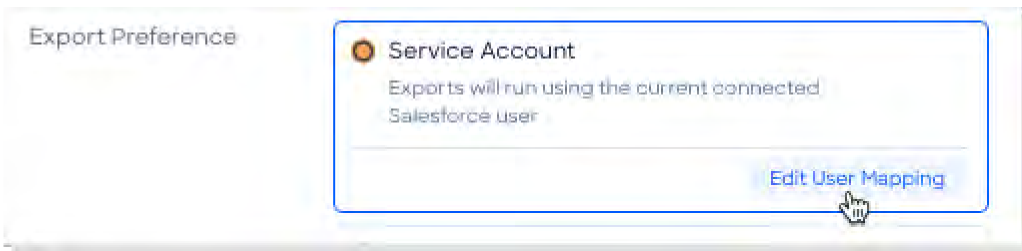


Tip: See the details about user mapping in the Get Connected procedure.

7. Return to the **Connected** tab and turn on the integration using the toggle.

Adding Users to Your Org Over Time

When you provision a new user in an organization that uses the Service Account option, verify the new user is mapped to their corresponding Salesforce user using the **Edit User Mapping** link on the **General Settings** page for the integration.



- If you do not proactively make the mapping, the system will automatically regenerate this mapping when the new user performs their first export.
- If the system is unable to map a user, the user can still perform exports as described in Record Ownership When Exporting Using a Service Account Connection.

Duplicate Checking Logic

When a user exports records from ZoomInfo to Salesforce, duplicate checking logic is applied to avoid creating duplicate records within Salesforce.

Admin Control of Duplication Settings

A ZoomInfo admin can control the user's available options for handling duplicates by configuring the default duplication settings for the integration in the Admin Portal. When a duplicate is encountered during export, users can choose the default behavior set by the admin or select other available options.

User Options During Export

During an export, duplicates are flagged and presented to the user. Depending on available options set by an admin, the user can choose to update an existing record, create a duplicate record, or not export the record.

Duplicate Logic

ZoomInfo checks for specific criteria, in a specific order, to determine if existing data in Salesforce matches data being exported.

For companies: Companies in ZoomInfo are equivalent to accounts in Salesforce. When exporting companies to Salesforce, ZoomInfo will check for duplicate Salesforce accounts using criteria applied in the following order:

1. ZoomInfo ID
2. Website
3. Exact Company Name

For people: People in ZoomInfo are designated as contacts, and can be exported as Salesforce contacts or leads.

When exporting contacts to Salesforce, ZoomInfo will check for duplicate Salesforce prospects using criteria applied in the following order:

Contacts (people associated with a company):

1. ZoomInfo ID
2. Email Address
3. First Name + Last Name + Exact Company Name

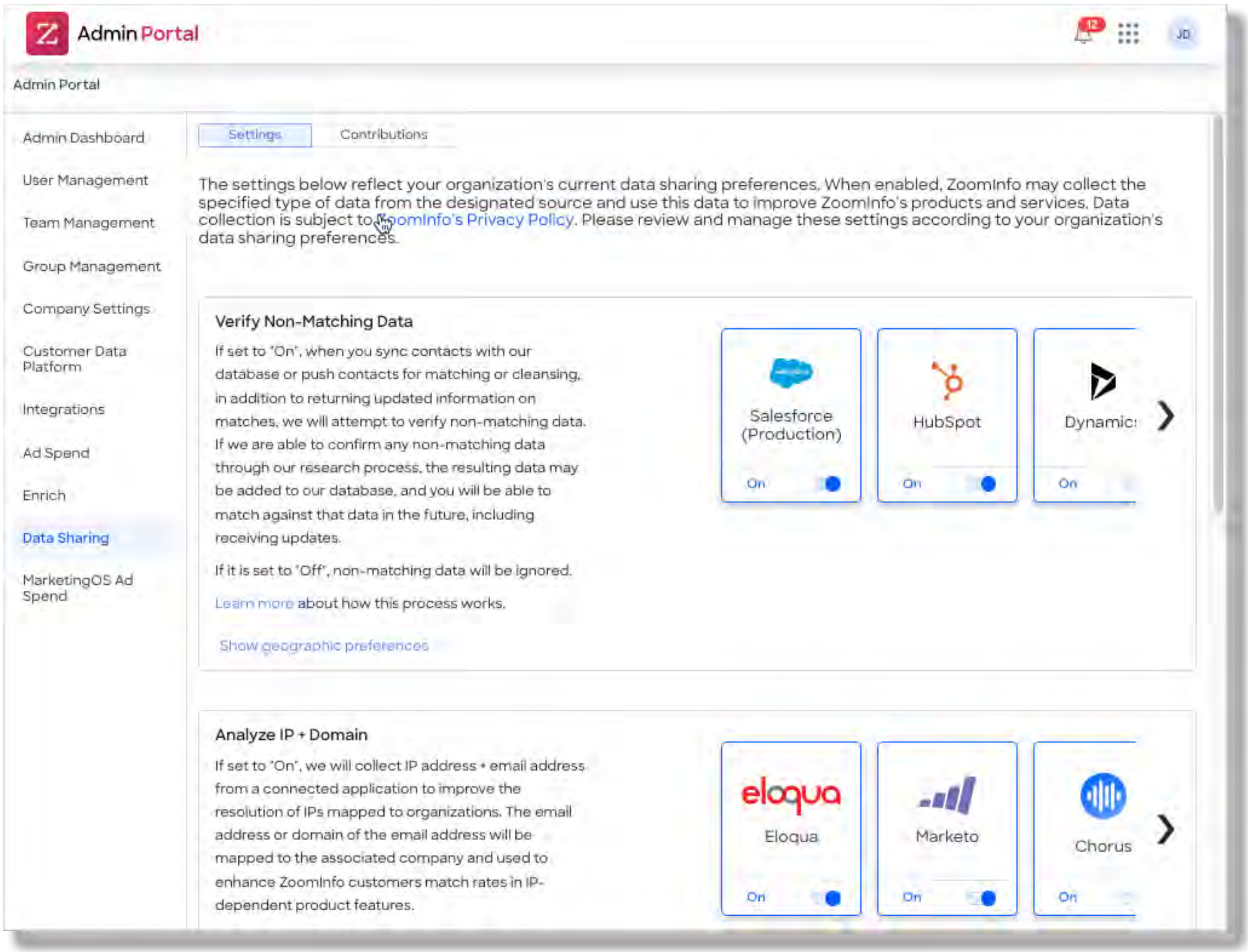
Leads (people not associated with a company):

1. ZoomInfo ID
2. Email Address
3. First Name + Last Name + Exact Company Name

Note: If a person in Salesforce exists as both a contact and a lead, ZoomInfo will present the contact record as the duplicate.

Data Sharing

The Data Sharing page in the Admin Portal is enabled if your organization has not contractually opted out of data sharing with ZoomInfo that is intended to analyze your use of connected integrations. Data sharing helps to improve the ZoomInfo service and make recommendations to you.



1. Go to **Admin Portal > Data Sharing**.
   - If your organization has chosen to opt-out of data sharing, the following message displays:

     As a precaution, this function is set to OFF and is not editable, in order to prevent unintended changes that may be in conflict with your organization's contractual terms.

   - If your organization has not opted out of data sharing, the **Data Sharing** page displays with the ON/OFF toggles enabled.

2. Data collection is subject to ZoomInfo's Privacy Policy. Review the policy details using the link provided.
3. Review and manage the data sharing settings according to your organization's data sharing preferences.
4. Over time, you can review the **Contributions** tab to monitor the contributions made by your organization.