Top Echelon Integration Guide for ZoomInfo Talent

For administrators setting up the ZoomInfo Talent integration with Top Echelon.

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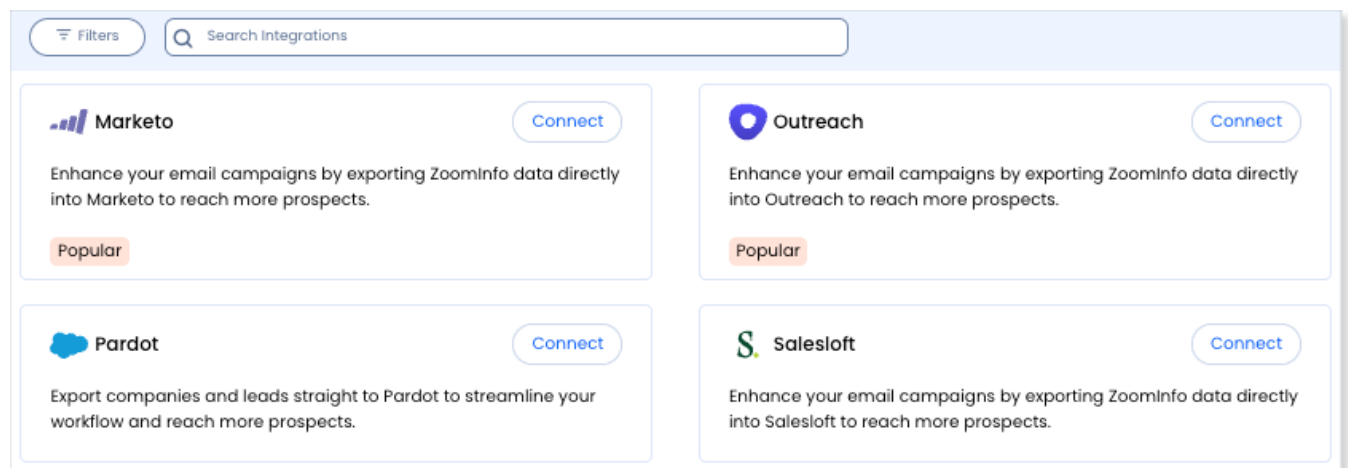
To get connected:

1. A ZoomInfo Talent admin establishes the connection to Top Echelon and configures export and custom mapping settings for their organization.

2. Once the admin connects the integration, all users will be able to use the integration.

Configure the Connection

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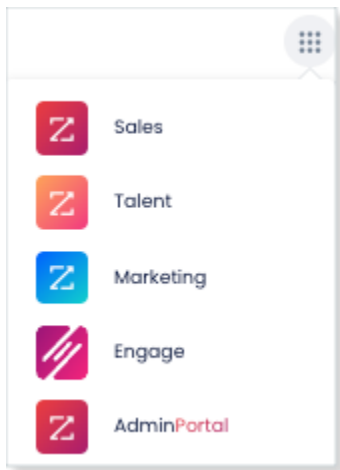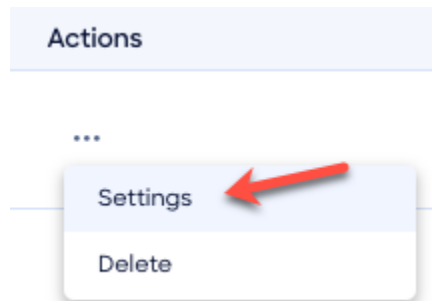

2. Click **Integrations**.

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.
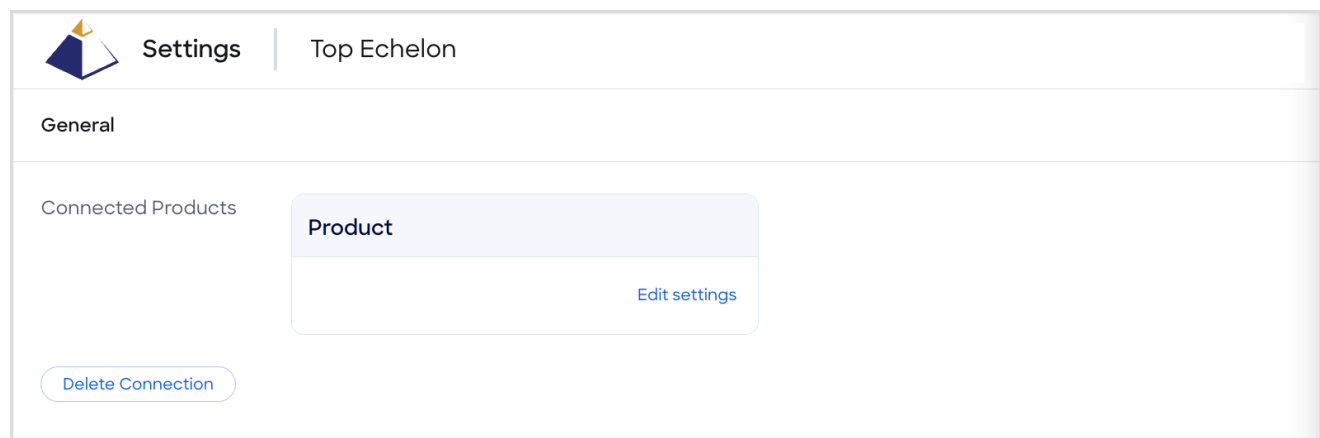
Configure Integration Settings

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 **Actions** 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 Top Echelon.

        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.

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

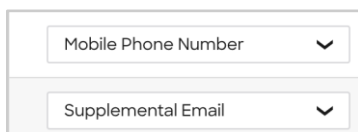## Personal Phone and Email Mapping

The default mapping for the Top Echelon 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.

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 Top Echelon Field

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

In this example:

- When contacts are exported to Top Echelon, **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 Top Echelon 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 Top Echelon.

Test and Save

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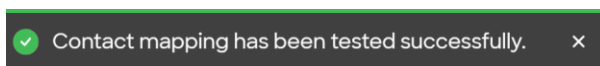

- If the test record cannot be created, this is typically due to an error in the mapping settings. For example, mappings cannot be saved with a blank field.
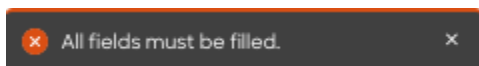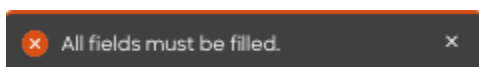

  Adjust the settings and click **Test Mapping** again.

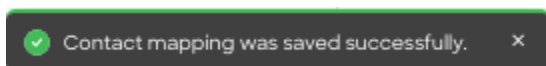- If the test is successful, a notification displays.

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.

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.

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 are connected automatically.

Admins should share the following link with users for instructions on how to connect and use the Top Echelon integration with ZoomInfo Talent.