Workflows Implementation Guide

For administrators implementing Workflows with ZoomInfo Sales or Marketing

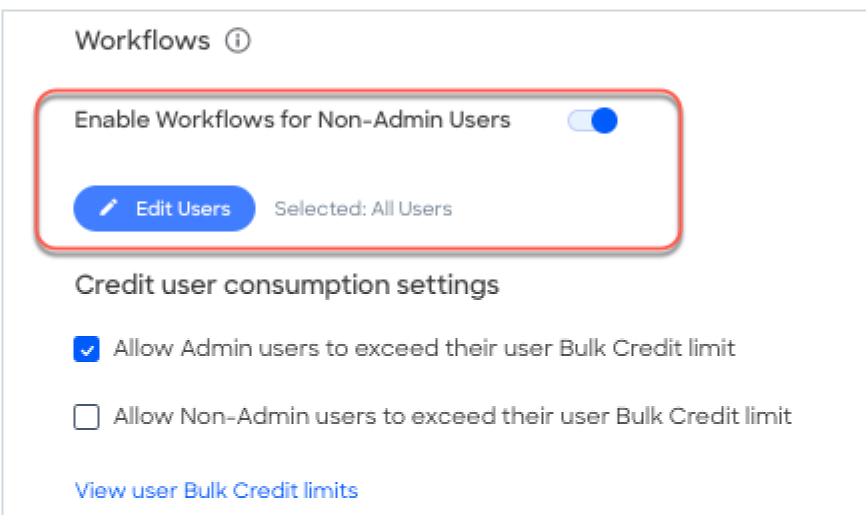
Workflows are automated actions to help you efficiently scale your go-to-market motions. Workflows are comprised of three basic components:

- **Trigger**: An event or activity that causes a Workflow to run. A Workflow can only have a single trigger.
- **Filter(s)**: Options for selecting what types of records should be processed and exported when a Workflow runs.
- **Action(s)**: What is done with the data after it has been filtered.

Enable Workflows for Non-Admin Users

By default, Workflows are initially enabled only for ZoomInfo admins. An admin can enable Workflows for all non-admin users, or select specific non-admin users.

1. Go to **Admin Portal > Company Settings**.
2. You can do one of the following:
    - Set the **Enable Workflows for Non-Admin Users** toggle to **ON** to enable Workflows for all users in your organization.
    - Set the **Enable Workflows for Non-Admin Users** toggle to **ON** and click **Edit Users** to enable Workflows for specific users.
    - Leave the toggle **OFF** to only enable Workflows for ZoomInfo admins.



Review User Credit Consumption Settings

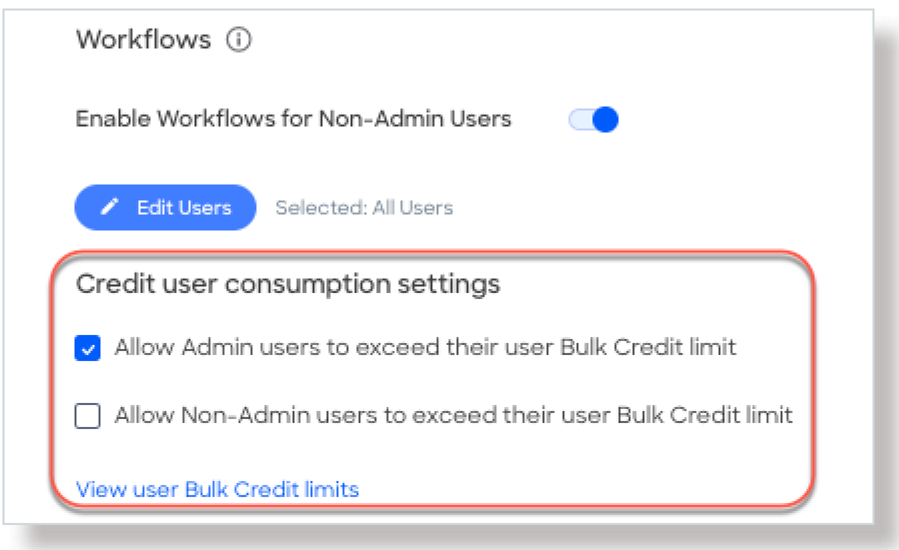
Your organization is charged a credit for each record that is exported or updated using a Workflow.

- The credits are deducted from your organization's Bulk Credits. If a user reaches their allotted credit limit, any Workflow they have created will be paused until they have access to additional Bulk Credits.
- Once a credit is charged for a record, your organization is not charged for subsequent exports or updates for 365 days.
- If a Workflow has multiple actions, and the same record is exported for all actions, only one credit is charged for the record.

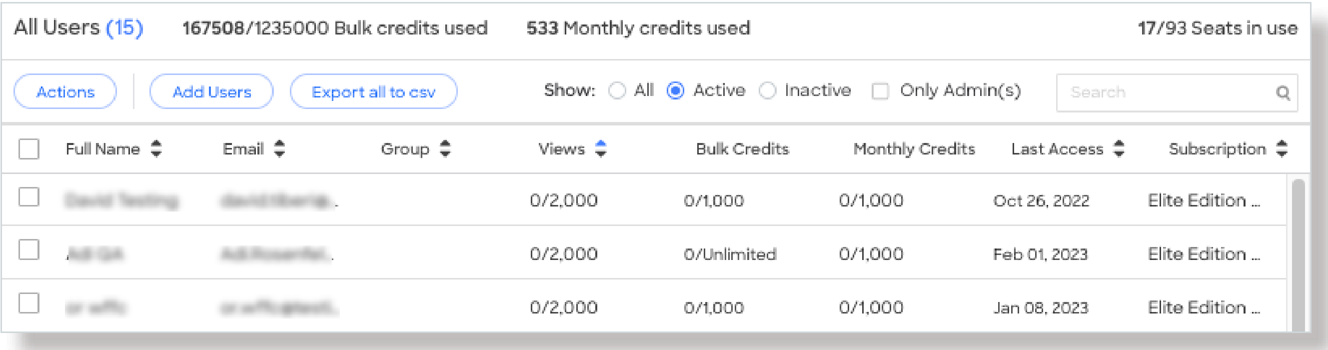
To manage the credit consumption settings for users enabled for Workflows:

1. In **Credit user consumption settings**, choose whether users you've enabled for Workflows can exceed their Bulk Credit limit.

   By default, admin users can exceed their Bulk Credit limit. Adjust these settings as needed.

2. You can also review and adjust the Bulk Credit limit for each user.
   a. Click **View user Bulk Credit limits**.
   b. Select users and click **Actions > Manage Limit** to increase or decrease Bulk Credit limits.



Use Field Mapping to Track Records Created or Updated Using Workflows

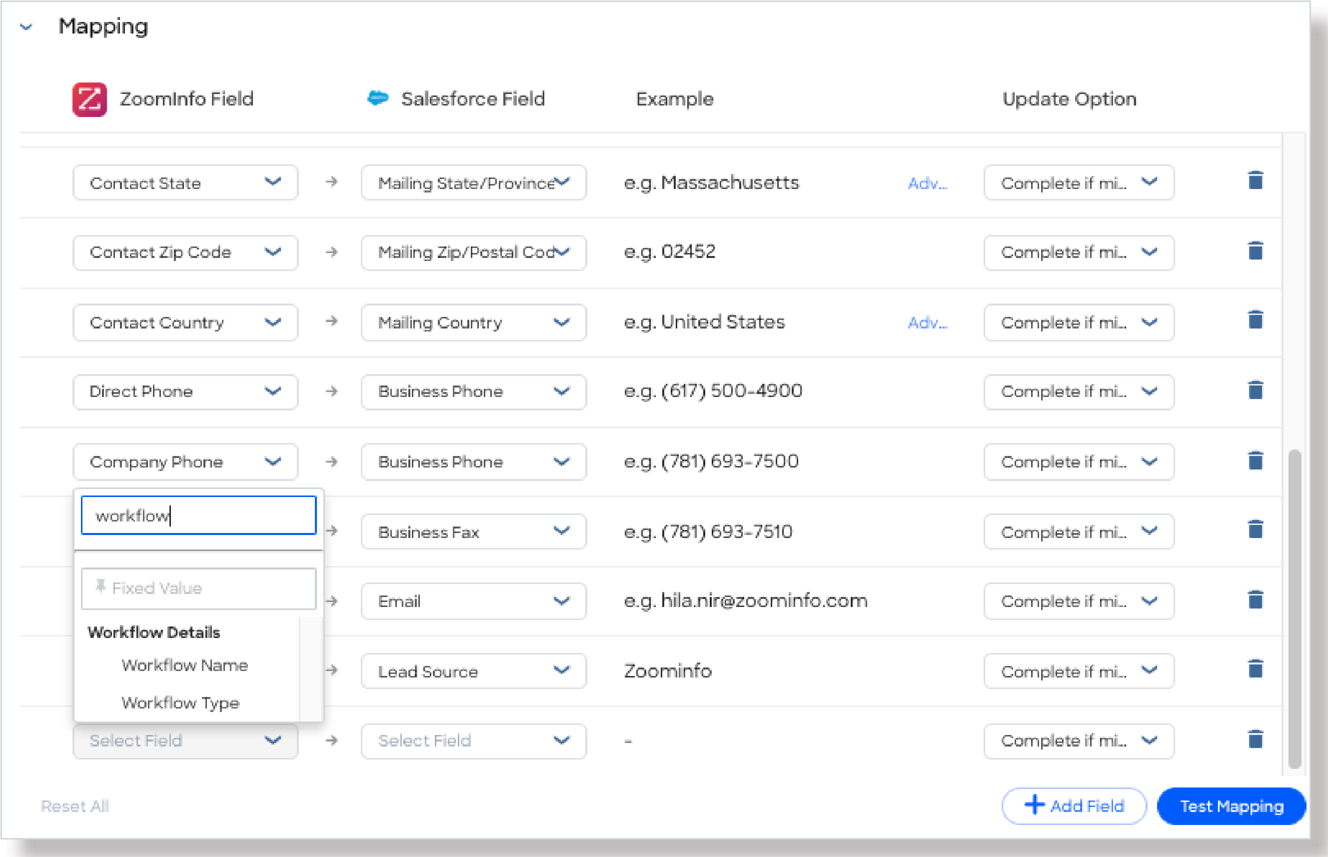
Admins can utilize Workflow-specific mapping fields to enable the tracking of records created or updated by Workflows in CRMs/MATs:

- Workflows Name
- Workflows Type

Note: For details about general field mapping from ZoomInfo to supported integrations, see the ZoomInfo Integrations Resource Matrix.

To map these additional fields to a corresponding field in your integration:

1. Go to **Admin Portal > Integrations**
2. On the **Connected** tab, find your integration and click it.
3. Click **Edit settings**.
4. Click the **Mapping** tab.
5. Select the object type (e.g., **Accounts**, **Contacts**, or **Leads**).
6. Add rows for the fields **Workflow Name** and **Workflow Type** to the list of mapped fields.



7. Map the fields to corresponding fields in your CRM/MAT.