Zoho Integration Guide

For administrators setting up the ZoomInfo integration with Zoho

Get Connected

ZoomInfo admins enable the Zoho integration for users and control user preferences including export settings, custom mappings, and data sharing settings. ZoomInfo users can then connect to Zoho using their credentials.

A ZoomInfo admin establishes the integration with Zoho that enables ZoomInfo users to connect and export data to Zoho.

1. Login to ZoomInfo and select **Admin Portal** from the waffle menu.
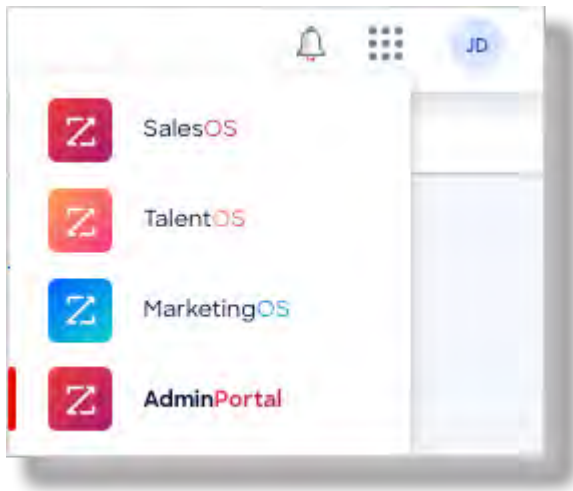
2. Click **Integrations**.
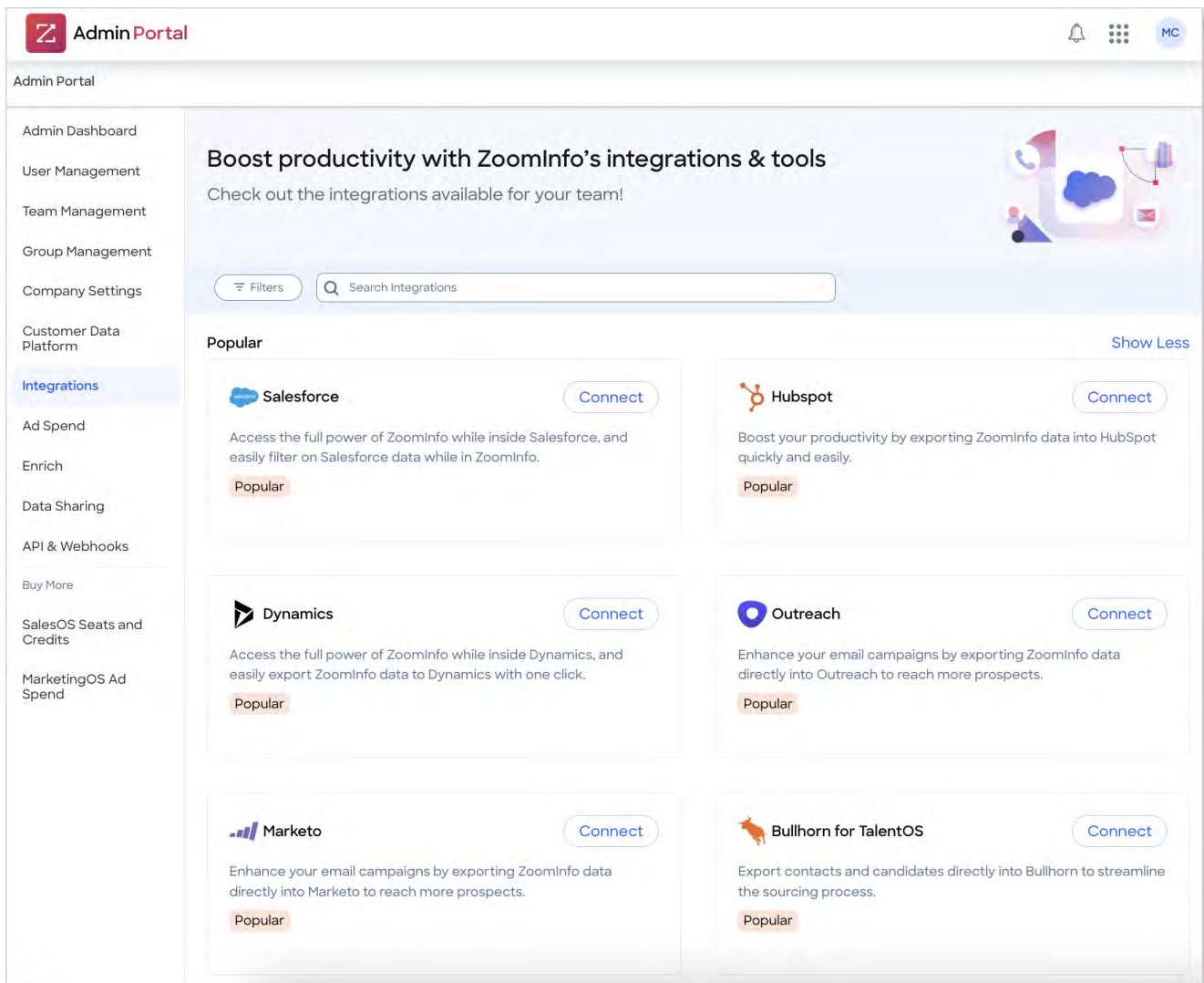
3. Explore the categorized list of integrations, use the **Filters**, or **Search integrations** options to find your integration.

4. On the tile for your integration, click **Connect**.

5. Complete the connection using your credentials. A success message displays.
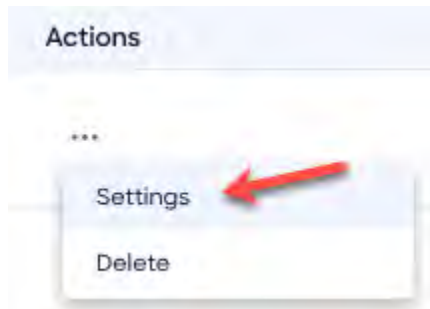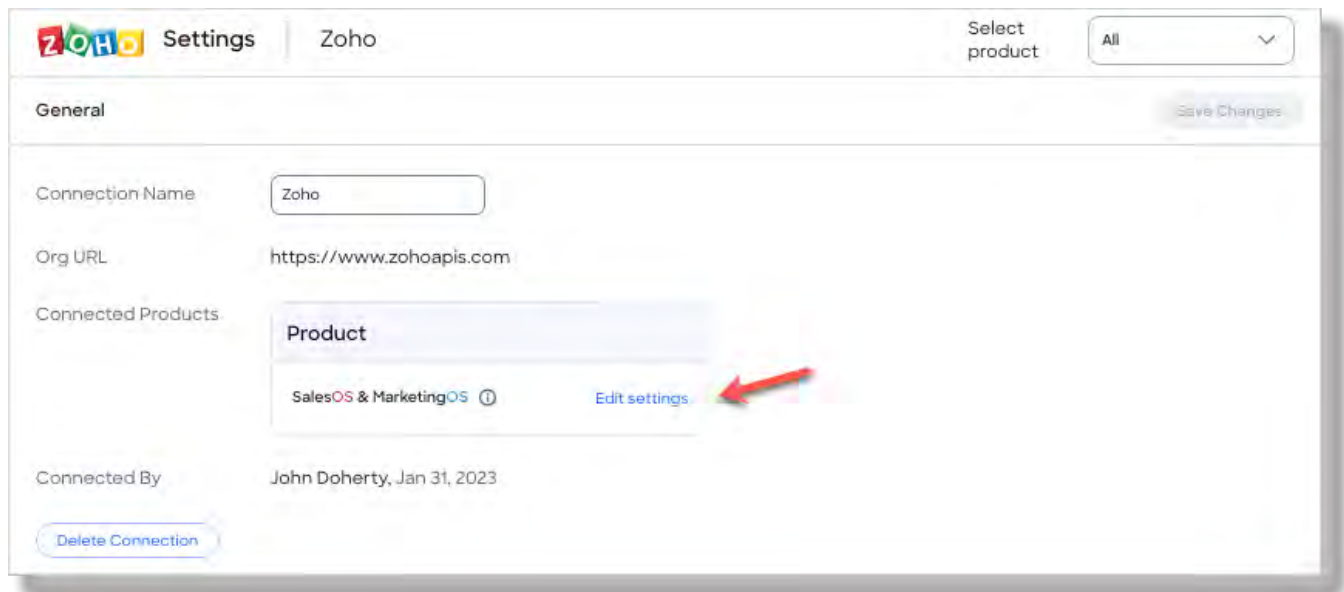
Configure Integration Settings

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.
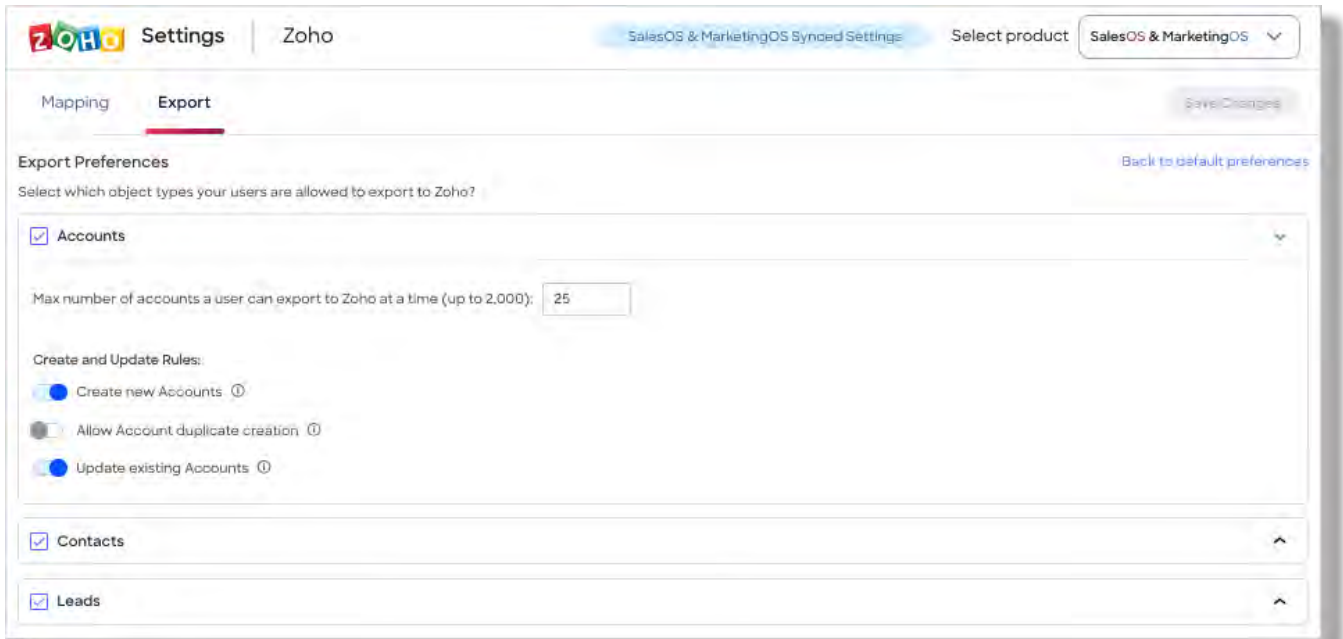

The **Settings** page displays.

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

Export Preferences

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

1. Click the **Export** tab.

2. Select each object type you want your users to be able to export to Zoho.

3. For each object type, set a maximum number of records a user can export to Zoho at one time (up to 2,000).

   Note: For the Contacts object, ensure that you review Export Considerations for details on the impact and expected behavior of account association settings.

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

Export Considerations

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 Zoho.

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 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.
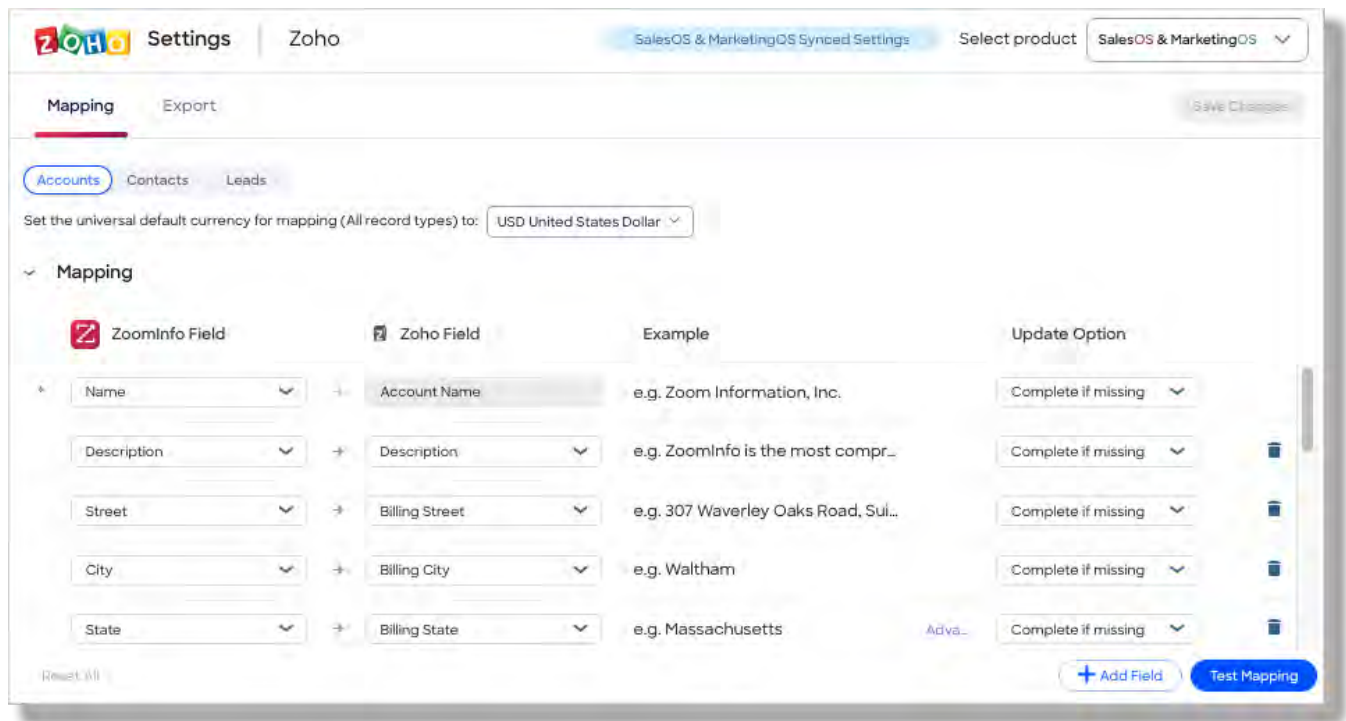
For a brief explanation of this configuration and a demonstration of the resulting experience for your organization's users, see the video below.

 Video: [SalesOS Administrator Export Preferences](#) (ZoomInfo login required)

Custom Mapping

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

 Video: [SalesOS Administrator Mapping Preferences](#) (ZoomInfo login required)

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 Zoho Field

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

For example, you may want to import both the ZoomInfo Direct Phone and Company Phone fields into the Zoho 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 Zoho fields. 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.
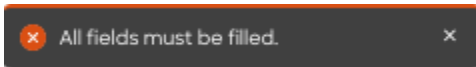
▶ **Video**: [Zoho Integration Custom Mapping](#) (ZoomInfo login required)

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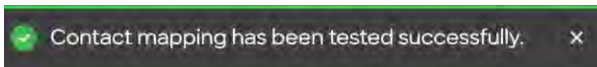
After performing a successful test mapping, click **Save Changes**.

- 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.

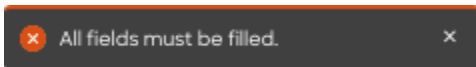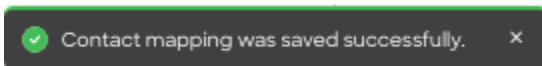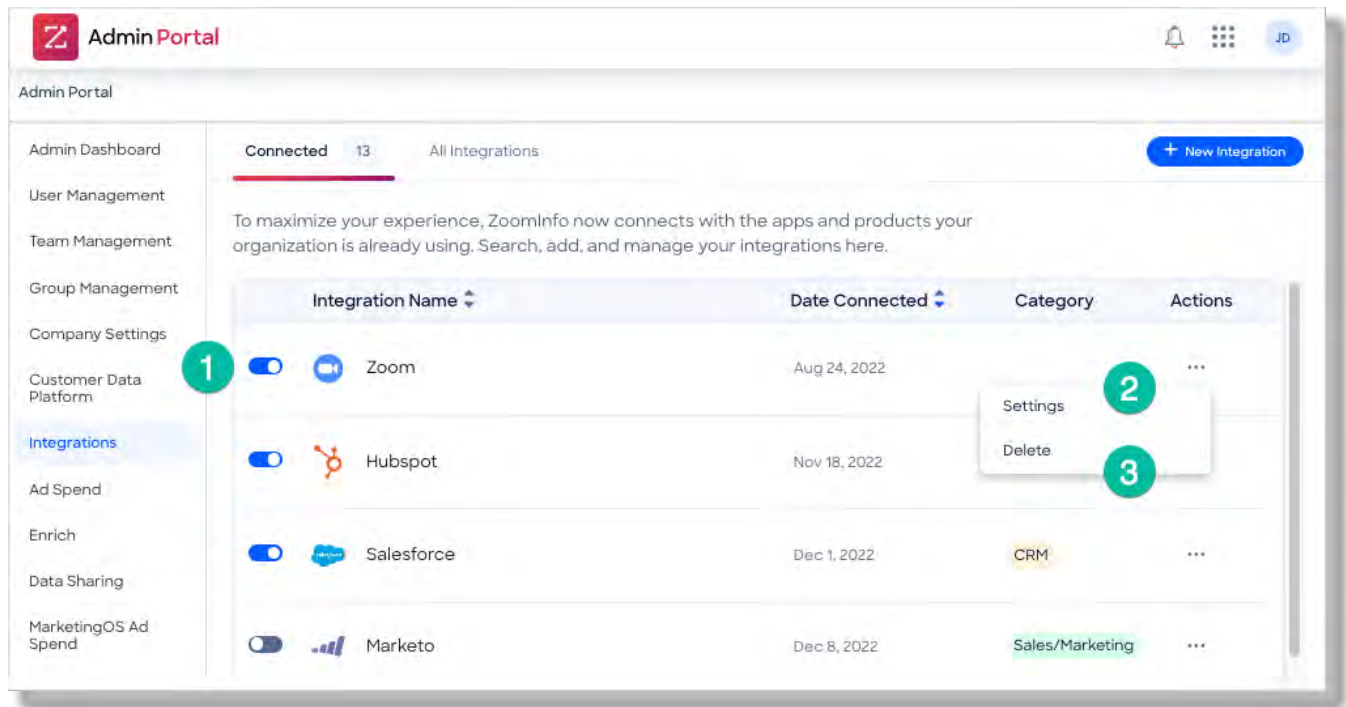# View and Manage Connected Integrations

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.

Duplicate Checking

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

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 Zoho matches data being exported.

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

1. Company Name

2. Short Company Name (first 5 characters)

3. Short Company Name (first 5 characters) + Domain

4. Short Company Name (first 5 characters) + Phone

5. Short Company Name (first 5 characters) + Billing Code

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

When exporting contacts to Zoho, ZoomInfo will check for duplicate Zoho contacts or leads using criteria applied in the following order:

Contacts (people associated with a company)

1. Email Address

2. First Name + Last Name + Exact Company Name

Leads (people not associated with a company)

1. First Name + Last Name + Email Address

2. First Name + Last Name + Phone

3. First Name + Last Name + Short Company Name (first 5 characters)

Note: If a person in Zoho 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.
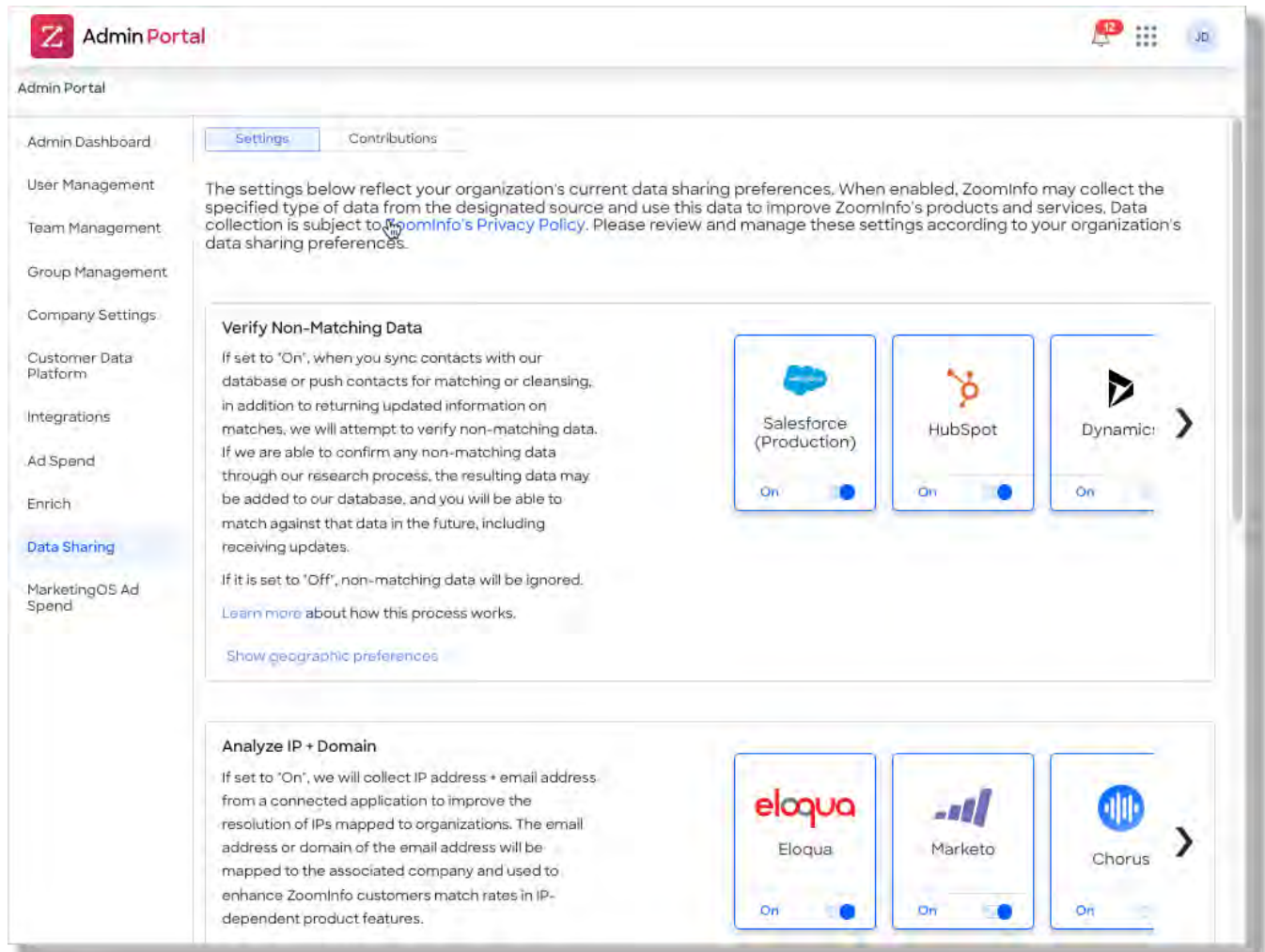
1. Go to **Admin Portal > Data Sharing**.

   - 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.

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 users can connect to Zoho.

Note: Once a user is connected to Zoho, the user will be assigned as Contact Owner for any contacts exported from ZoomInfo to Zoho (unless the Zoho admin has set up alternative automation or mapping preferences).

Admins should share the following link with users for instructions on [how to connect ZoomInfo to Zoho](#).