ZoomInfo for Slack Integration Guide

For administrators setting up the ZoomInfo for Slack integration for use with Workflows and Chat

With [ZoomInfo for Slack](#), sales, marketing and recruiting teams can continually monitor their entire total addressable market or talent pool and be alerted immediately to actionable insights affecting their target accounts, territories, or hiring initiatives.

ZoomInfo for Slack App

A ZoomInfo administrator can connect the ZoomInfo for Slack app for use with ZoomInfo Workflows and ZoomInfo Chat.
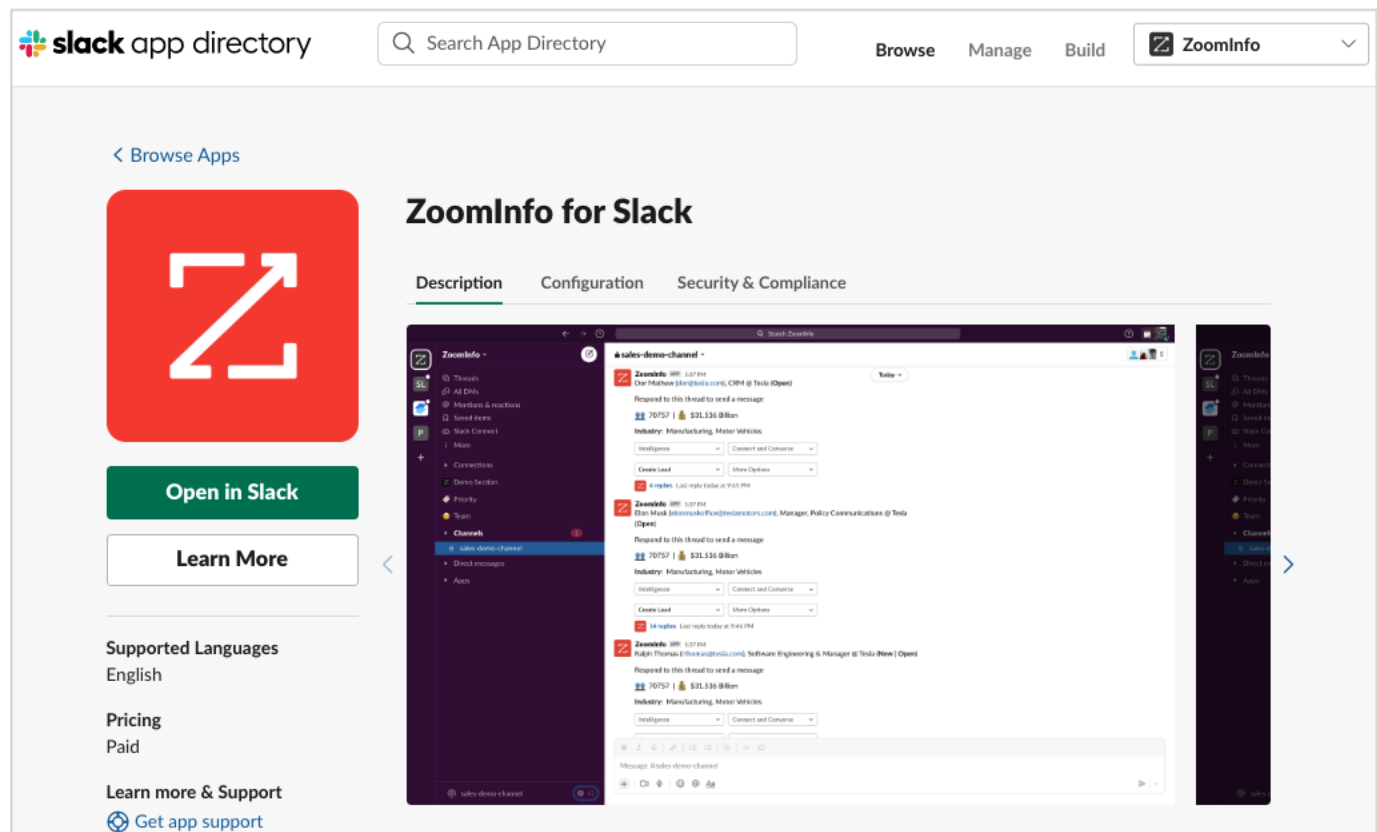
ZoomInfo Workflows for Slack: Our Slack integration for ZoomInfo Workflows enables ZoomInfo administrators or users to setup and receive automated alerts in Slack when companies or professionals they're monitoring submit or abandon a form, visit their website (or specific pages on their website), receive funding, spike on an intent topic, and more.

ZoomInfo Workflows can post to Slack channels or send direct messages, and will include relevant insights from ZoomInfo in the message so that reps have all the necessary information they need to take appropriate action.

ZoomInfo Chat for Slack: Our Slack integration with ZoomInfo Chat enables frontline reps (or agents) to engage in live chat conversations with qualified website visitors directly from within Slack.

- ZoomInfo Chat uses smart routing to alert the right representative when a visitor meets specific criteria and takes specific actions online.

- A complete profile of the visitor is enriched with ZoomInfo intelligence and shared with the agent directly in a Slack channel that can be tailored to specific types of activity or specific visitor profiles.

All of this happens in real time, enabling immediate and informed conversations that lead to higher onsite conversion. Other features include quick responses, visitor profile updates, support ticket creation, feedback request initiation, and more.
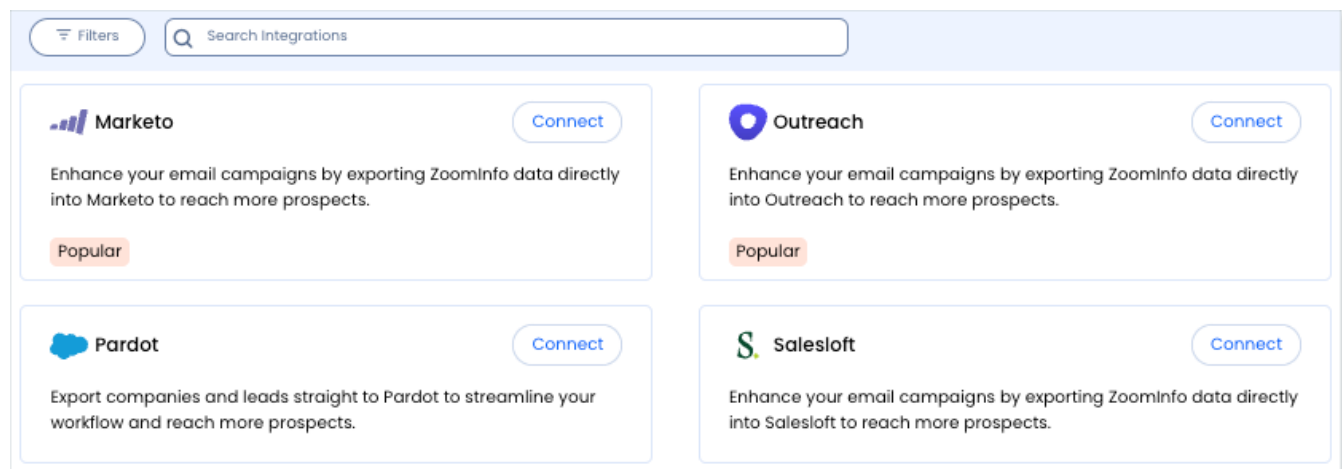
Get Connected

To successfully connect the ZoomInfo for Slack app to your Slack workspace you must have permissions to connect third party apps to your workspace. Contact your IT administrator for assistance if needed.

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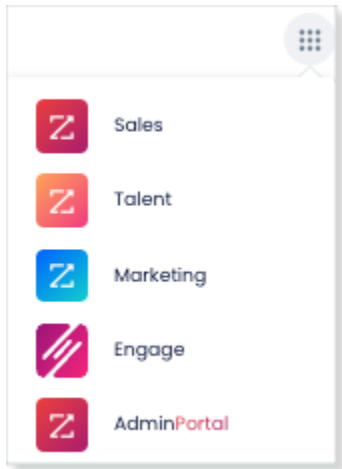
2. Click **Integrations**.

3. Complete the connection using your credentials.

4. Toggle the Slack connection on to enable for all users.

Configuring ZoomInfo for Slack with Workflows

You can configure your Workflows to send notifications to a Slack channel when a ZoomInfo Workflow has run, providing timely information as soon as possible to relevant stakeholders.
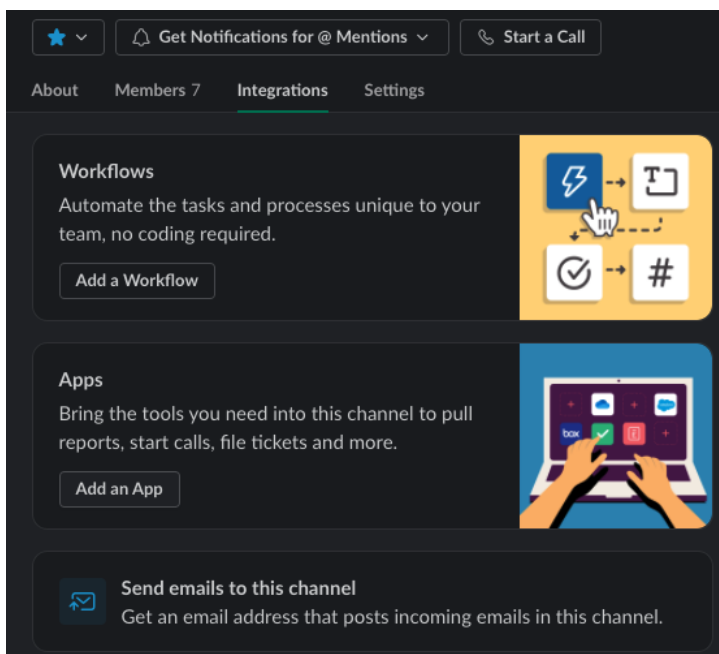
The notification includes:

- A link to the Workflow

- Firmographic and contact information

Add the ZoomInfo for Slack App to Slack channels

Add the ZoomInfo for Slack app to one or more Slack channels to which you want notifications sent.

1. In Slack, click the dropdown next to the channel title and select **Integrations**.


2. Under **Apps**, click **Add an App** and search for and select the **ZoomInfo for Sales** app.

3. Repeat this procedure for each Slack channel to which you want notifications sent.

Add Slack as a Workflows Action

Once you've added the ZoomInfo for Sales app to desired channels, an admin or user configuring a Workflow can configure a Slack notification:

1. Select **Slack** as an action for the Workflow.
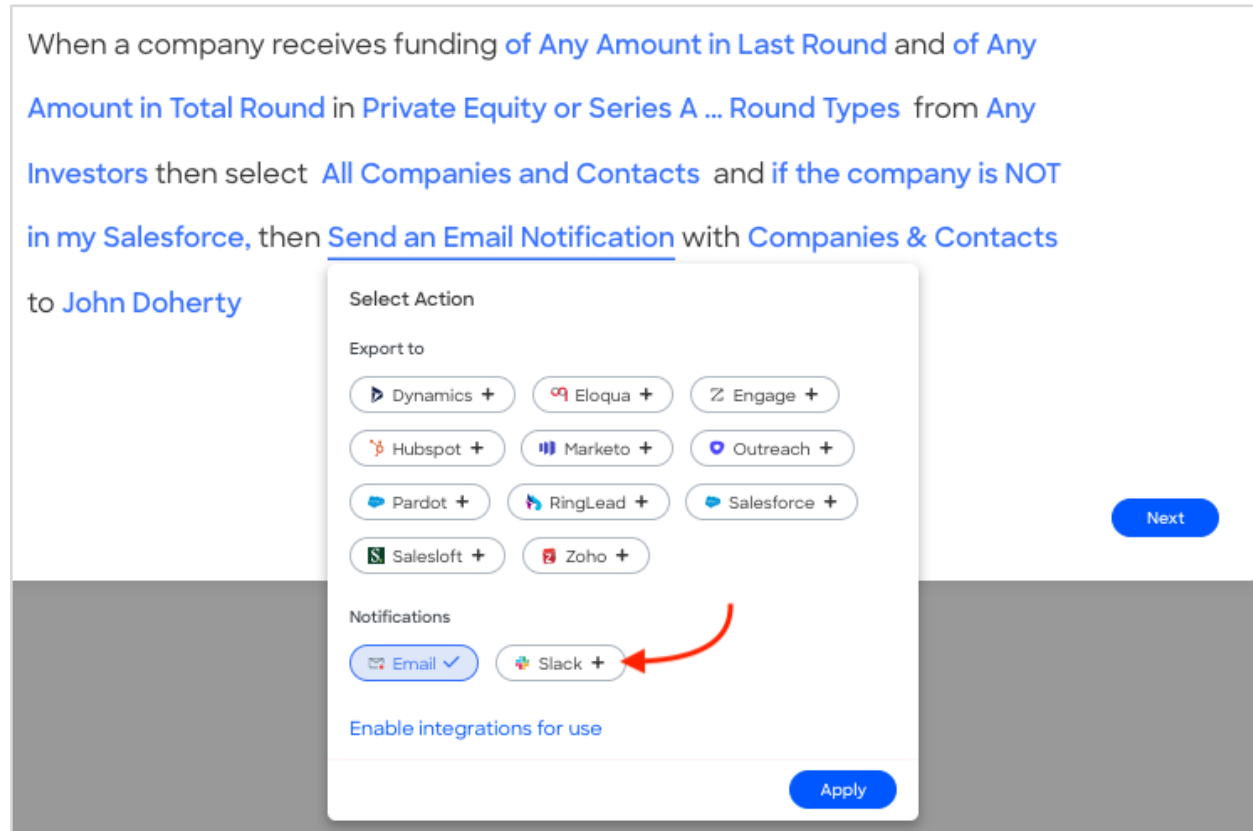
2. Choose the **Slack** user(s) or channel(s) you want to notify. Users can send to any Slack user at their organization or post any channel in the Slack workspace to which the ZoomInfo for Slack has been added.
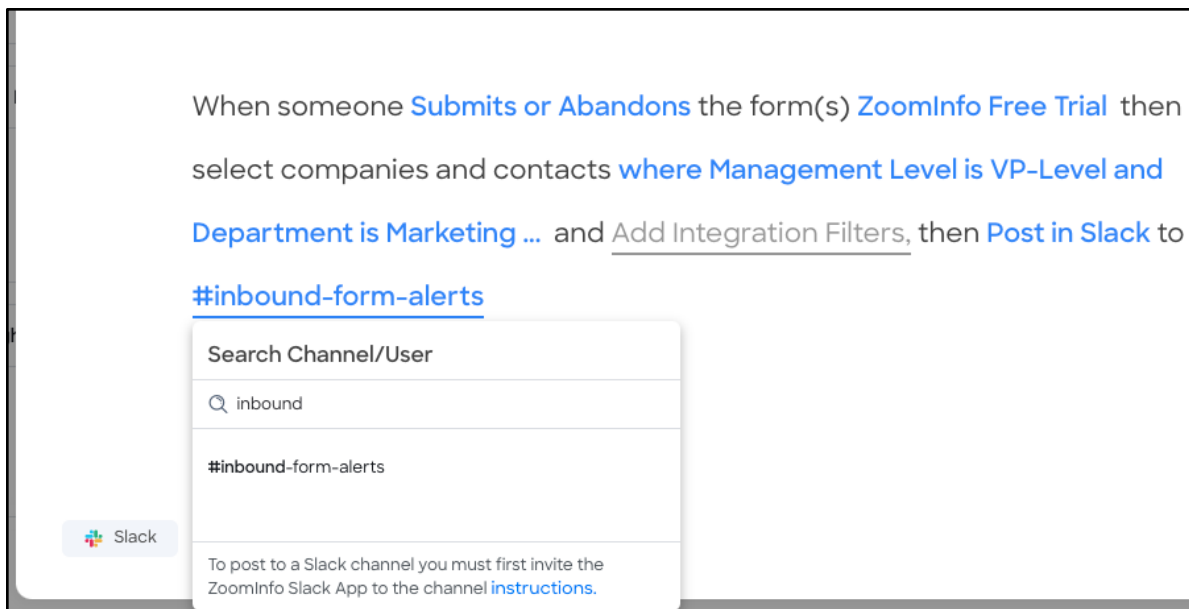
When the Workflow processes, the post will include details including the trigger type, the Workflow name, and relevant Company and Contact information.

Important Considerations

Review these considerations when enabling the ZoomInfo for Slack app.

Remove Link Previews

Admins or Slack workspace owners may want to remove link previews to provide a better visual experience in Slack. To remove link previews from posts generated using ZoomInfo Workflows, follow the instructions in this Slack Help Center article, under "Turn off previews for specific sites".

Slack Rate Limits

Slack rate limits prevent apps from posting more than one message per second to a Slack Workspace. This means that Workflows set to process immediately (such as Streaming WebSights or Streaming Intent) may be subject to these rate limits, depending on the volume of records that meet the filter criteria.

Configuring ZoomInfo for Slack with ZoomInfo Chat

A ZoomInfo Chat admin can use the integration with Slack to support proactive agent notifications in Slack channels. Use the Slack integration to:

- Notify your agents in Slack proactively when high-value prospects are active on your website.

- Enable visitors requests to connect to an agent using Slack.

To configure sending connection requests to Slack, an active Slack integration is required.

Add the 'Connect to agent' Step to a Chat Conversation

Using the 'Connect to agent step' in the conversation builder, you can enable Chat to send agent connection requests to a specific Slack channel.

- The 'Connect to agent' step enables you to alert specific agents/teams, or use round-robin routing to alert from a pool of agents and teams.

- You can also notify all channel participants using an '@here' mention.

- You can add multiple routing steps to help you handle escalations when agents are unavailable.

For more details on setting up the 'Connect to agent' step in the Routing in ZoomInfo Chat article.

Add the ZoomInfo for Slack App to Slack Channels

To send visitor connection requests to your agents in Slack, add the ZoomInfo for Slack app to Slack channels.

1. In Slack, click the dropdown next to the channel title and select **Integrations**.
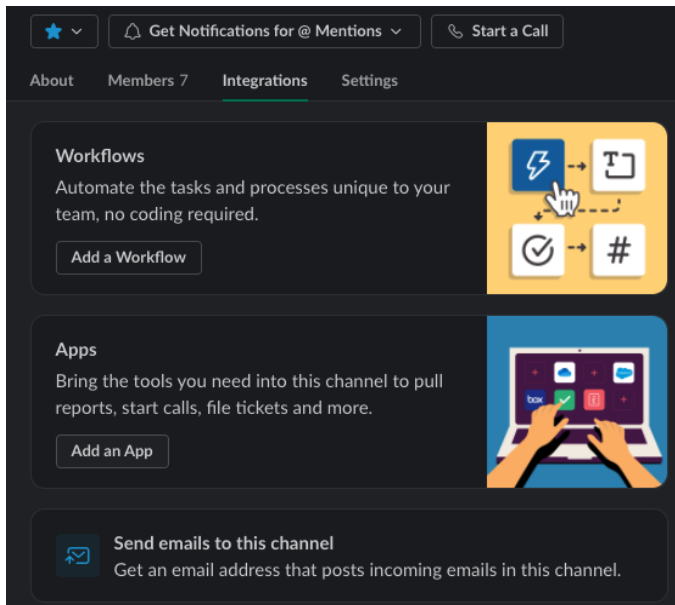
2. Under **Apps**, click **Add an App** and search for and select the **ZoomInfo for Sales** app.

Once you've added ZoomInfo to a Slack channel, it will show up on the list of available Slack channels when configuring the 'Connect to agent' step.

Tip: If you don't see the channel listed, click the refresh button to fetch the channels again.

Best Practices

Here are a few best practices for admins to consider when integrating ZoomInfo Chat with Slack.

Create a Private Slack Channel for Agents

We recommend creating a new private channel in Slack that includes the agents responsible for the conversations on ZoomInfo Chat. Using this practice, the other participants in your Slack workspace won't be affected.

- After selecting the Slack channel and adding the people you want to notify, the alerts will be automatically sent to this channel.

- If the alerts are enabled for Slack, the agent connection request will only be sent to the Slack channel. Connection requests will not be sent to Inbox for the same 'Connect to agent` step.

Notify Agents

Agents who have been added as users in the ZoomInfo Chat Inbox can only be notified individually.

- Non-ZoomInfo Chat Slack-only users who may be members of the channel can still respond to visitor conversations.

- Whenever a non-ZoomInfo Chat user in Slack responds to an agent connection request, a new ZoomInfo Chat user is created for that person with the role 'Slack Only User' once they accept the request, send a message, or create/send a quick reply

See Visitor Details

When the 'Connect to agent' step is used in a conversation, ZoomInfo Chat will send a request to your Slack channel.

- If the visitor's name is unknown, the system will automatically assign a visitor name (e.g., Visitor N123).

- In the future, if ZoomInfo Chat resolves the visitor's name from any touchpoint, the random name given to the visitor in the Slack conversation will be changed to the name of the visitor.

Agents can click **Visitor Info** to show the person's/account's details visiting the website. This includes the visitor's Name, Email, Account details, along with recent product activity.
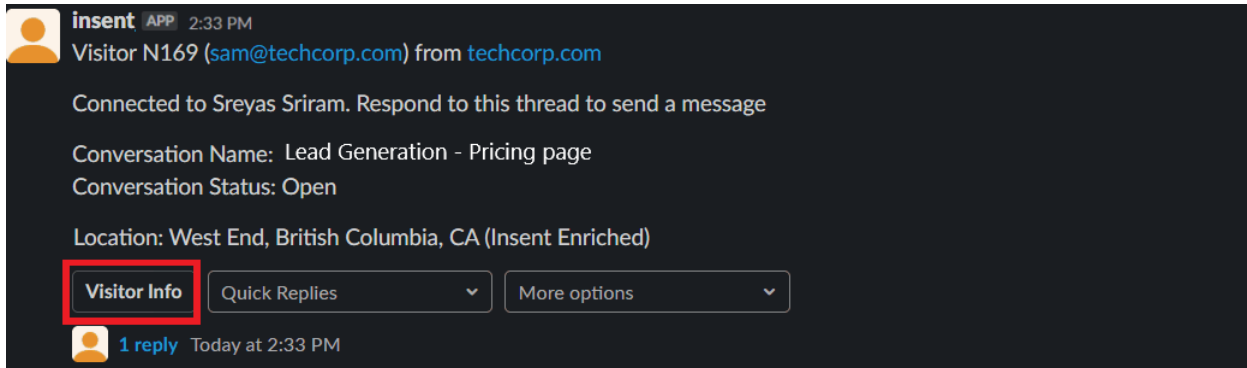

Learn more about Visitor Info in the visitor profile help document.

Accept Requests

Any member on the Slack channel can accept the request.

- If someone in the channel accepts the request, ZoomInfo Chat will update the request description to indicate the acceptance.

- A channel member can also directly send a quick reply or send a message in the chat thread to accept a visitor chat request and connect with a visitor.
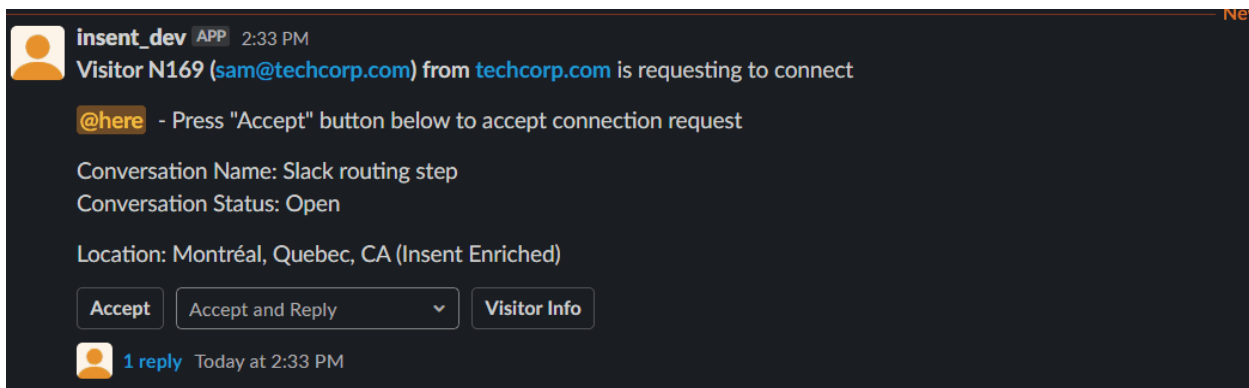
Configure Request Timeout and Expiration

The default request timeout is 30 seconds, after which the request to connect will expire. You can adjust this default timeout under 'Execution time' in the 'Connect to agent' step.
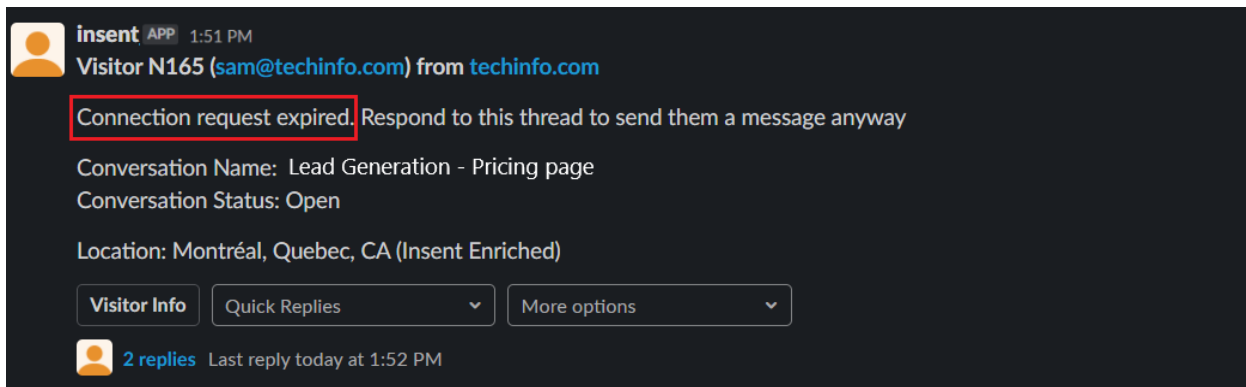
An agent can attempt to re-initiate a conversation by replying to an expired conversation.

Establish Pre-Configured Replies

A Chat admin can establish some pre-configured replies, helping agents reduce manual effort by reusing phrases or sentences to answer frequently asked questions. An agent can then select one of these replies from the 'Quick Replies' option in Slack, or manually type a custom reply.

Learn more in the Quick Replies article.
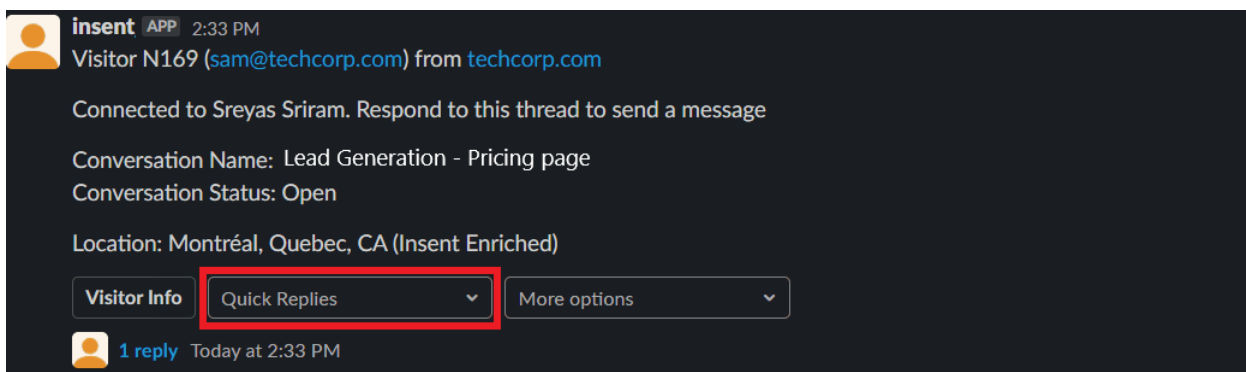
More Options

Using 'More options,' an agent can:

- Modify the conversation status or modify visitor information shared in chat.

- Open or close a conversation, or mark it as pending using the Open, Close and Pending options.

- Create or update lead information for the visitor. Learn more about Create Lead and Update advanced info of lead in the Lead creation from Slack article.

- Request visitor feedback at the end of a successful conversation. Learn more in the Visitor feedback score article.

Location: San Francisco, California, US (Insent Enriched)

Visitor Info   Quick Replies   ⌄

🔷 👤 **2 replies** Last reply today at 1:41 PM

🔷 **Insent** `APP` 1:42 PM
Visitor A759

Connected to Sreyas Sriram. Respond to t|

Conversation Name: Sales Conversation -
Conversation Status: Open

Location: San Francisco, California, US (Ins|

Visitor Info   Quick Replies   ⌄   More options   ⌄

Profile Information

Create lead

Update advanced info of lead

Zendesk

Create zendesk ticket

Zendesk knowledge base

More Options

Ask visitor feedback

🔷 👤 **2 replies** Last reply today at 1:42 PM