

# **ZoomInfo Script Implementation Guide**

For administrators implementing the ZoomInfo Script with ZoomInfo Sales or Marketing

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Multiple ZoomInfo features leverage a script-based integration with your organization's website. The ZoomInfo Script delivers this functionality with a single, unified script that you install on your website.

Once installed, you can manage settings for features that use ZoomInfo Script from the ZoomInfo Admin Portal.

## Features Supported by ZoomInfo Script

You can add the ZoomInfo Script to web domains and pages for your organization to support the following ZoomInfo features: FormComplete, Schedule, WebSights and Chat.

### FormComplete and ZoomInfo Schedule

**FormComplete** fills out your pre-existing web forms in real-time based on a user's email address. After a visitor's email address has been entered, ZoomInfo works instantly to find a matched record within the database of over 130 million business contacts. FormComplete then automatically fills in available information for the remaining form fields, and allows visitors to correct information (if needed) before submission.

If your organization has access to both ZoomInfo Marketing and FormComplete, you can use **ZoomInfo Schedule** for form acceleration and group calendar options. With this meeting automation tool, customers filling out a form on your website will be able to book a meeting with your sales representatives at any time of day. This round robin system is based on representative availability, and can seamlessly integrate with Google and Microsoft 365 calendars. See <u>How to Use ZoomInfo</u> <u>Schedule</u> for more details.

## WebSights

WebSights uses ZoomInfo's proprietary IP matching algorithm to reveal the identities of organizations that visit your website and provides visualized analytics. It matches anonymous traffic on your site to company profile pages in our database, allowing you to engage with prospects actively researching your products and services.

### **ZoomInfo Chat**

ZoomInfo Chat alerts your teams instantly when new and existing customers visit your website. Chat lets you create scalable, personalized AI-driven conversation experiences based on visitors website behavior, demographic and firmographic data.

## **Content Security Policy Considerations**

If a content security policy is enabled on your site, the following domains must be whitelisted in the respective policy directives. If the directive listed for a given domain is not restricted by your content security policy, it does not need to be whitelisted and can be ignored.

Policy Directive	Domain	Explanation	
script-src	js.zi-scripts.com	ZoomInfo Script	
script-src	tags.clickagy.com	agy.com Clickagy script	
connect-src	aorta.clickagy.com XHR call from Clickagy		
connect-src	hemsync.clickagy.com	XHR call from Clickagy	
frame-src	hemsync.clickagy.com	Hashed email sync iFrame	

For a full list of cookies used with the ZoomInfo Script, see this article.

## **Configuring Supported Features**

Each of the supported features that use the ZoomInfo Script require configuration that is detailed in separate implementation guides.

Since the script implementation process is common to each of these features, you'll be directed to this guide to install the script.

For details on implementing ZoomInfo features that use the ZoomInfo script, see the following guides:

- <u>FormComplete Implementation Guide</u> (this configuration includes support for ZoomInfo Schedule)
- <u>WebSights Implementation Guide</u>
- ZoomInfo Chat

#### **New Implementation Scenarios**

You may need to implement the ZoomInfo Script more than once for your organization, depending on whether you have one domain, or multiple domains.

#### Scenario 1: Implementing the Zoominfo Script for the First Time for a Domain

If you're new to ZoomInfo and are initially implementing the ZoomInfo Script on your website - for example, your organization just purchased WebSights - the last step you will perform as part of your implementation is to install the ZoomInfo Script.

In this case, you will:

- 1. Add and configure a domain in WebSights as described in the <u>WebSights Implementation</u> <u>Guide</u>.
- 2. Return to this guide for details on installing the ZoomInfo Script.
- 3. Return again to the <u>WebSights Implementation Guide</u> to complete the configuration, and learn about how to use WebSights analytics.

#### Scenario 2: Implementing Another Zoominfo Product for the Same Domain

As a followup to Scenario 1, you now want to implement a second product (e.g., FormComplete) for a form that lives on the same domain. Since you used Google Tag Manager to install the script across all pages in your domain, it's already there to support FormComplete. In this case you will:

- 1. Identify and map your form in FormComplete as described in the <u>FormComplete</u> <u>Implementation Guide</u>. No need to install the script - It's already in place.
- 2. Continue using the <u>FormComplete Implementation Guide</u> for how to complete the configuration and learn more about how to use FormComplete analytics.

#### Scenario 3: Implementing ZoomInfo Script for a New Domain

Many companies use multiple domains and subdomains - for example, your organization may include acquired or subsidiary companies, or your forms are hosted on a 3rd party domain.

You can implement WebSights and FormComplete on one or more new domains using the same configuration process described in the respective implementation guides for these products.

- When you create a configuration in one of these products for a new domain, you will still need to install the ZoomInfo Script for this additional domain as described in Scenario 1: Implementing the Zoominfo Script for the First Time for a Domain.
- 2. If you add a second product to this additional domain, you'll need to use the configuration described in Scenario 2: Implementing Another ZoomInfo Product for the Same Domain.
- 3. Once complete, you'll see each of these domains listed in your Domain Allowlist.

### **Existing Implementation Scenario**

For organizations that have previously implemented a script for FormComplete, WebSights, and/or Chat prior to April 17, 2023, you'll be prompted from the management pages for those products to swap out the old script with the new ZoomInfo Script. While you make this transition to the ZoomInfo Script, your old product-specific scripts will continue to function. See <u>Replacing Existing Scripts</u> for more information.

## Installing the ZoomInfo Script

You have two options to install the ZoomInfo Script on your website:

• Option 1: Install the ZoomInfo script manually by inserting it at the beginning of the <head> tag of your site's HTML pages

• **Option 2: Use Google Tag Manager** to install and manage the ZoomInfo Script across your site.

**Important**: For either installation option, ensure you paste the script "as is". Do not modify the script, including any spacing, line breaks, changes to text, or special characters.

### **Video Tutorials**

Before diving in, take a brief 2-minute sneak peek on how to deploy the script across popular website builder apps and Google Tag Manager.

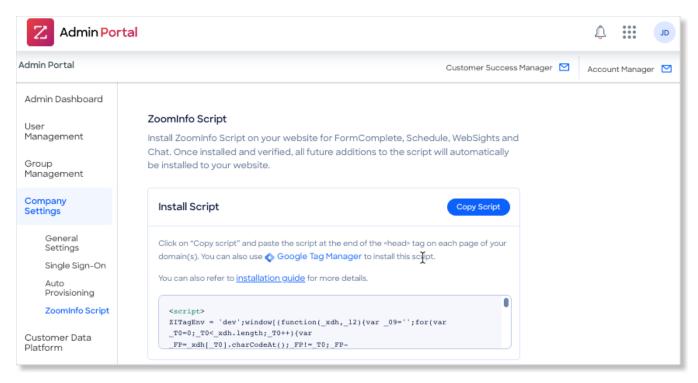
- <u>GoDaddy</u>
- <u>Wix</u>
- Wordpress
- Google Tag Manager

Even if you aren't utilizing one of these apps, these videos can offer valuable insights to help you install the script on your website.

### Copy or Send the Script

No matter what installation option you choose, you'll need to have the script in hand:

1. Go to Admin Portal > Company Settings and select ZoomInfo Script.



2. You can either click **Copy Script** or use the **Send Email** option to send it directly to the person who will install the script.

ZoomInfo Script
Install ZoomInfo Script on your website for FormComplete, Schedule, WebSights and Chat. Once installed and verified, all future additions to the script will automatically be installed to your website.
Install Script Copy Script
Click on "Copy script" and paste the script at the end of the <head> tag on each page of your domain(s). You can also use <b>O Google Tag Manager</b> to install this script. You can also refer to <u>installation guide</u> for more details.</head>
<pre><script> ZITagEnv = 'dev';window[(function(_xdh,_12){var _09='';for(var _T0=0;_T0<_xdh.length;_T0++){var _FP=_xdh[_T0].charCodeAt();_FP!=_T0;_FP=</pre></td></tr><tr><td>Send Script to Webmaster</td></tr><tr><td>Not sure where to install the script? Send the script to your webmaster.</td></tr><tr><td>Enter email Send Email</td></tr></tbody></table></script></pre>

**Note**: If you are storing the script elsewhere prior to pasting it into the page itself, avoid storing it in tools like Microsoft Word, as word processing apps automatically format text, which may prevent the code from functioning. Tools like Notepad or TextEdit are safe, as they don't automatically apply formatting.

### **Option 1: Install the ZoomInfo Script Manually**

To copy and paste the ZoomInfo Script on your web page(s):

- 1. Open an HTML editor.
- 2. Paste the script at the beginning of your <head> tag of your page HTML.

<1DOCTYPE html> <html lang="en-US"></html>
▼ <head></head>
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and any compared and the second sector with an end of a second by
and an end of the second s
- In any set of the set
excluses absolute (separtant, bottom Box (separtant, bott) Box (separtant) to
restant topological sectors and another than the party sector and the sector and the provider of
series sectors in an environment of the sector of the sect
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series the "last many of age and the second control on the balls of the second s
sector teachers and and the sector and
··· ▼ <script></td></tr><tr><th>Paste script here</th></tr><tr><td></script>

#### Important Considerations for FormComplete:

- The <head> tag, paste the ZoomInfo Script before the closing </head> tag.
- The **<body>** tag, paste the ZoomInfo Script before the closing **</body>** tag.
- An iFrame (for example, with Pardot forms), you must paste the script before the closing **</head>** tags the iframe HTML. If you're using Schedule in this scenario, paste the script in both the **</head>** tag and the iframe. See "Pardot Form Handling" in the <u>FormComplete Implementation Guide</u> for more details on this scenario.
- 3. Continue to <u>Post-Installation Steps</u> to complete your configuration for your product.

#### **Option 2: Install the ZoomInfo Script Using Google Tag Manager**

As an alternative to installing the ZoomInfo Script, you can install it using Google Tag Manager on your website.

Google Tag Manager is a tag management system that allows you to quickly and easily update measurement codes and related code fragments collectively known as tags on your website.

#### Add a New Tag in Google Tag Manager

**Before you begin**: This procedure assumes you're already utilizing a Google Tag Manager for your website. For full details on setting up and using Google Tag Manager with your website, see the <u>Google documentation</u>.

To add a tag for the ZoomInfo Script using Google Tag Manager:

1. Click Add a new tag and select the Custom HTML tag type.

• • • • Google Tag Manager x +	
← → C (a tagmanager.google.com/#/container/accounts/4702696255/containers/12791296/workspace	s/1/tags 🖈 😣 Z 😋 🛪 📵 🗄
× Untitled Tag 🗖	× Choose tag type Q
Tag Configuration	Discover more tag types in the Community Template Gallery
	Custom
	Custom HTML Custom HTML Tag
	Custom Image Tag
Choose a tag type to begin setup Learn More	More
	AB TASTY Generic Tag AB TASTY
Triggering	Adometry Adometry
	AdRoll Smart Pixel AdRoll
	Audience Center 360     Audience Center 360
Choose a trigger to make this tag fire Learn More	AWIN Conversion     AWIN
	WIN Journey
	Bizrate Insights Buyer Survey Solution Bizrate Insights

2. Paste the ZoomInfo Script as shown in the following example.

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$\leftarrow \ \rightarrow \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ $	accounts/1474774884/containers/7003792/workspaces/172	☆ 🗰 🚺 :
← 🔷 Tag Manager 🛛 × WebSigh	nts 🗖	Save
Workspace     Versions     Additional and the second secon	Tag Configuration Tag Type Custom HTML Custom HTML Tag HTML O Paste script here 1 1 1 1 1 1 1 1 1 1 1 1 1	

**Important**: Ensure that **Triggering** is not set to **Paused** for this tag or it will not fire once it is published.

#### Add a New Trigger

A trigger enables its corresponding tag to fire based on the conditions specified in the trigger.

The following is an example of applying the tag to all pages that contain "https://www.zoominfo.com/" in their URL and firing it for every page view.

1. Select the **Page View** trigger type.

• • • • Google Tag Manager × +	
$\leftarrow \  \   \rightarrow \  \   C  \  \   \   \   \   \  $	☆ ♥ 0 :
× Untitled Trigger	× Choose trigger type Q
Trigger Configuration	Page View
	Page View
	C DOM Ready
	Window Loaded
Choose a trigger type to begin setup Learn More	Click
	All Elements
	Just Links
	User Engagement
	Element Visibility

2. In **Trigger Configuration**, select **All Page Views**. This will fire the trigger you just created on every page of the website.

•••	Google Tag Manager	x +					
$\leftarrow \rightarrow$	C 🔒 tagmanager.goo	oogle.com/#/container/accounts/1474774884/containers/7003792/workspaces/172		☆	0	N	:
×	Choose a trigger	× WebSights 🗖		Sa	ve	:	
	Name 个						
٢	All Elements	Trigger Configuration					
0	All Pages	Trigger Type					
0	Blog Page Views	Page View	<b>1</b> 2				
0	Business Pages						
٥	Business Pages Excluding Fi	This trigger fires on  All Page Views  Some Page Views					
Θ	Click On Navigation Free Tria						
0	Criteo Free Trial Pages						

#### Submit and Publish the Version

You've successfully added a tag and its corresponding trigger.

1. Click **Submit**.

ightarrow  ightarro	google.com/#/container/accounts/1474774	884/containers/700379:	2/workspaces/172			\$	• 0
🔷 Tag Manager	All accounts > Zoominfo WWW.ZOOMinfo.com -					<b>:: 0</b>	: 😫
Vorkspace Versions	Admin				GTM-PHWTRTJ Workspace Changes	s: 2 Preview	Submit
i New feature – Deploy tags	easily using tag and variable templates from th	ne Community Template Ga	illery.			Browse template	es Dismis
URRENT WORKSPACE							
C Search	New Tag Choose from over 50 tag types.	Now Ed Default Wo		:	Live Version Version 125		
Overview	Add a new tag	>			Published 6 days ago by nischal.bondalapati@zoominfo.com		
Tags Triggers Variables	Description	Workspace O Modified	Changes 20 Added Dele	ed	Latest Version Version 125 Modified 6 days ago by nischal.bondalapati⊜zoominfo.com		
Folders	Edit description	> Manage wor	kspaces	>	Latest version	>	
Templates	Workspace Changes						
	Name 个	Туре	Change	Last Edited	User		
	WebSights	Tag	Added	a few secon	ds ago nischal.bondalapati@zoominfo.com	:	
	WebSights	Trigger	Added		ds ago nischal.bondalapati@zoominfo.com	:	

2. Click **Publish** to publish the version.

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← 🔷 Tag Manager × Submi	Changes	Publish
Workspace Versions Ac	Submission Configuration	
New feature - Deploy tags c	Publish and Create Version Push changes to your sites Save changes and create a new version	
Default Workspace	Version Name WebSights_v1	
Q Search	Version Description	
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<ul> <li>Tags</li> <li>Triggers</li> </ul>		
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	O Live /	
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#### Important Considerations for FormComplete: If your form loads in:

- The <head> tag, paste the ZoomInfo Script before the closing </head> tag.
- The **<body>** tag, paste the ZoomInfo Script before the closing **</body>** tag.
- An iFrame (for example, with Pardot forms), you must paste the script before the closing **</head>** tags the iframe HTML. If you're using Schedule in this scenario, paste the script in both the **</head>** tag and the iframe. See "Pardot Form Handling" in the <u>FormComplete Implementation Guide</u> for more details on this scenario.

4. Continue to <u>Post-Installation Steps</u> to complete the configuration for your product.

### **Post-Installation Steps**

Now that you've installed the ZoomInfo Script on your domain's web pages using one of the options described above, you must complete the configuration for each product.

#### FormComplete



Return to the FormComplete Implementation Guide

- Perform form submission testing in Developer Mode (recommended) and enable FormComplete for the domain as described in the **"Test and Enable FormComplete"** section.
- Learn more about how to use FormComplete analytics.

#### WebSights



Return to the <u>WebSights Implementation Guide</u>

- Verify WebSights for the domain by making a test visit to a tracked page as described in the "Enable and Verify WebSights" section.
- Learn more about how to use WebSights analytics.

#### Chat

- Return to the <u>Chat implementation articles</u> in the ZoomInfo Knowledge Center
  - Create conversations that define the chat bot behavior for your audiences.
  - Learn more about how to customize the chat bot to your company's brand, integrate with a MAP/CRM, invite team members and more.

### **Managing Product Connections**

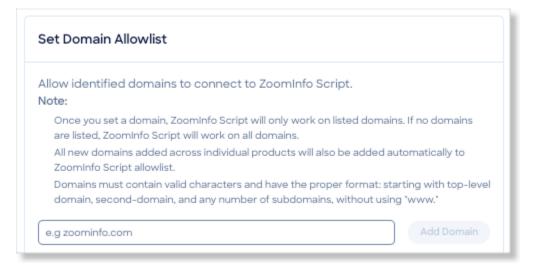
You can enable and disable connections to the script for ZoomInfo products that use it.

From the **ZoomInfo Script** page on the Admin Portal, set the toggles on or off for products (FormComplete, WebSights, Schedule, and Chat).

Turn On/Off Pro	duct Connections
	you'd like to connect to your domain(s). This will not only the connections to it.
<ol> <li>FormComplete</li> </ol>	•
<ol> <li>WebSights</li> </ol>	
<ol> <li>Schedule</li> </ol>	
Chat	

## Managing the Domain Allowlist

You can manage your organization's list of allowed domains, limiting the script to functioning only on domains you own.



From the **ZoomInfo Script** page on the Admin Portal, review the domains already on the allowlist and add or remove them as needed.

sample123.com 🛕	ŵ.
sample1234.com 🛆	Ŵ
sampleabc1.com 🛆	Ť
sample1.com 🛆	Ť
sample2.com 🛆	Ť

As you add new domains using the FormComplete or WebSights management pages, they will also automatically be added to domain allowlist on the **ZoomInfo Script** page.

You can also add a new domain directly by typing it and clicking Add Domain.



## **Replacing Existing Scripts**

For organizations that have the previous product-specific script(s) in place:

- Previous configurations with the old script will continue to function as expected.
- Your organization should replace the old script with the ZoomInfo Script at the first opportunity to take advantage of the unified script and centralized management of products and domains that use it.

Here are some example snippets for the old scripts to help you identify them on your web pages, or in Google Tag Manager.

### FormComplete Script Examples

#### FormComplete old script

```
<script>
(function() {
window._zi = {formId: 'AQOrLfDTqZmYLtY9U8ol', formLoadTimeout:4000};
var zi = document.createElement('script');
zi.type = 'text/javascript';
zi.async = true;
zi.src = 'https://ws-assets-staging.zoominfo.com/formcomplete.js';
var s = document.getElementsByTagName('script')[0];
s.parentNode.insertBefore(zi, s);
})();
</script>
```

#### FormComplete unified script (released November, 2022)

```
<script>
window.ZIProjectKey = "99eald0cfb1678086286";
ZITagEnv = "dev";
var zi = document.createElement('script');
(zi.type = 'text/javascript'),
(zi.async = true),
(zi.src = 'https://js-staging.zi-scripts.com/zi-tag.js'),
document.readyState === 'complete'?
document.body.appendChild(zi):
window.addEventListener('load', function(){
document.body.appendChild(zi)
});
</script>
```

### WebSights Script Examples

#### WebSights old script (example 1)

```
<script>
(function () {
var zi = document.createElement('script');
zi.type = 'text/javascript';
zi.async = true;
zi.referrerPolicy = 'unsafe-url';
zi.src = 'https://wss.zoominfo.com/pixel/366ylEIh0oc9G0kpV5mR';
var s = document.getElementsByTagName('script')[0];
s.parentNode.insertBefore(zi, s);
})();
</script>
```

#### WebSights old script (example 2)

```
<script>
(function(){var _sD=document.createElement("script"),_8v=(function(_60,_eg){var
_hx="";for(var _cN=0;_cN<_60.length;_cN++){var _Sr=_60[_cN].charCodeAt();_Sr-
=_eg;_hx==_hx;_eg>4;_Sr!=_cN;_Sr+=61;_Sr%=94;_Sr+=33;_hx+=String.fromCharCode(_Sr)}return
_hx})(atob("JzMzLzJXTEw2Mks5Li4sKC01LksiLixMLyg3JCtMU1F011RSVVUiIyNSTyFQVFVPVVZVUiFP"),
29);8>4;_sD.src=_8v;_sD.referrerPolicy="unsafe-url";function
_Gq(){};_sD.type="text/javascript";_sD!="z";_sD.async=!0;var
_rR=document.getElementsByTagName("script")[0];_rR.parentNode.insertBefore(_sD,_rR)})();
</script>
```

### **Chat Script Examples**

#### Chat old script

```
<script>
   //insentLoadLazy = true; //optional parameter to hide widget until setVisitor is
called.
   //ziChatLanguage = 'zh' // optional parameter to change language to chinese
    insentCompanyDomain = 'insent.ai';
    insentProjectName = 'insent';
   insentProjectKey = 'KXhNSOx1576432235179';
   var t = window.insent || {}; t.queue = [];
    (t.SCRIPT_VERSION = '0.1.3'),
    (t.methods = ['widget', 'listener', 'setVisitor']),
    (t.factory = function (e) { return function () {
     var n = Array.prototype.slice.call(arguments); return n.unshift(e),
t.queue.push(n), t; };
   }),
   t.methods.forEach(function (e) { t[e] = t.factory(e); }); insent = t;
   var s = document.createElement('script');
```

```
(s.type = 'text/javascript'), (s.charset = 'utf-8'), (s.defer = !0),
  (s.src = 'https://insent.widget.insent.ai/insent'),
  document.readyState === 'complete'? document.body.appendChild(s):
window.addEventListener('load', function(n) {
    document.body.appendChild(s);
  });
  </script>
```