A ZOOMINFO IMPLEMENTATION GUIDE

Salesforce Suite User Manual

zoominfo®

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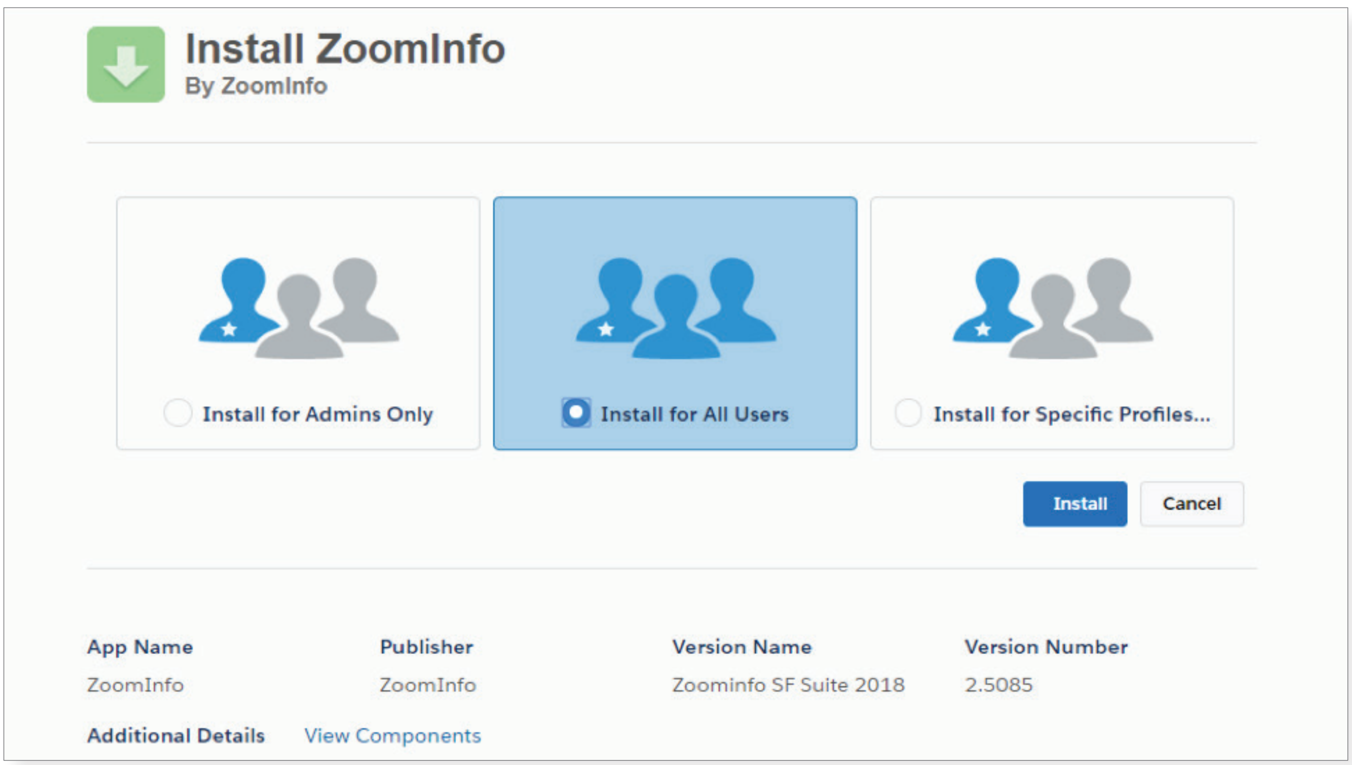
Install ZoomInfo Salesforce Suite

Install Application

Install the ZoomInfo Salesforce Suite package into your SF organization, by clicking on the following link: https://login.salesforce.com/packaging/installPackage.apexp?p0=04t44000000gTgt

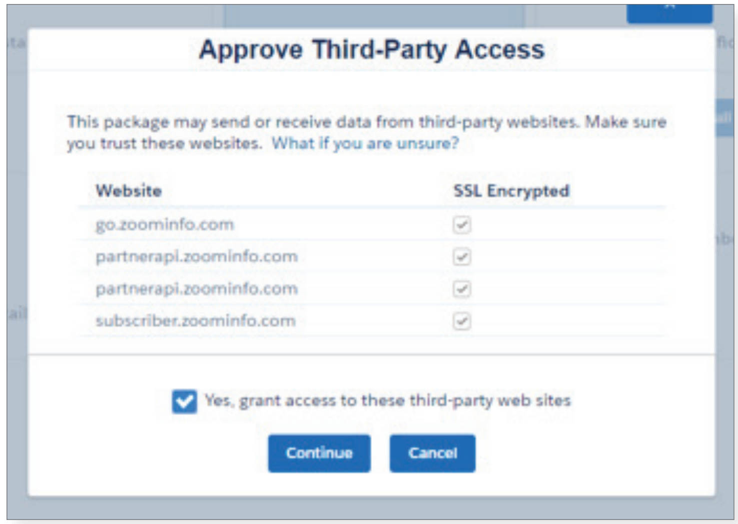
You will be prompted to install the package based on following selections:

- What if existing component names conflict with ones in this package?
  - Select 'Do not install'
  - Select 'Install for All Users' (recommended)
  - Click 'Install'



Note: *If you are installing into a sandbox organization you must replace the initial portion of the URL with* *http://test.salesforce.com*

You will then be asked to approve third-party access. The four websites listed are used to connect to ZoomInfo data. Click the checkbox marked Yes, grant access to these third-party web sites. Click Continue. The installation will begin.



Adjust Tab Settings

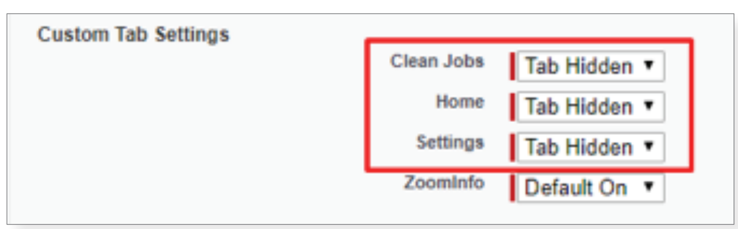
Once the ZoomInfo for Salesforce Suite has been successfully installed, we recommend adjusting which profiles will have access to the admin configuration of the tools. To do so, you will change profile access to ZoomInfo Admin tab, ZoomInfo Complete tab, and ZoomInfo Clean app. This setting change will prevent certain users from accessing the administrative configuration for ZoomInfo tools:

1. Navigate to Salesforce Setup. Search **Profiles**. Underneath Manage Users, select **Profiles**.

2. Click Edit next to each profile you wish to hide the ZoomInfo Administrative Tabs from.

3. Once on the profile settings, scroll down to the Tab Settings section. See Custom Tab Settings.

4. Using the dropdown menu adjacent to each tab, set the following tabs to Tab Hidden:
   - ZoomInfo Admin
   - ZoomInfo Complete
   - Home
   - Settings
   - Clean Jobs



5. Click **Save**

6. Repeat these steps for all profiles you wish to hide tab visibility.

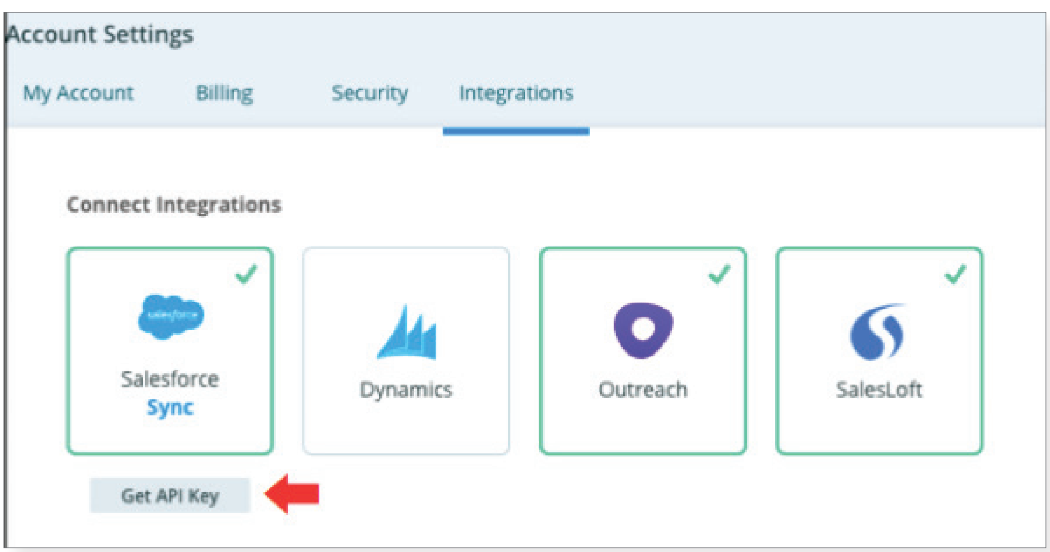
ZoomInfo Salesforce Application

Download ZoomInfo API Key (1.0 Users)

1. You will have to generate a text file to upload as a static resource within Salesforce. To generate the text file, log into your ZoomInfo account: www.zoomInfo.com/login
2. Hover over your name in the top right corner, select **My Account**
3. Under Connect with Salesforce.com, click the **Get API Key button**
4. Once the text file has downloaded, save it to your desktop or someplace that you can retrieve easily.

Download ZoomInfo API Key (2.0 Users)

1. Log into your ZoomInfo account: www.zoomInfo.com/login
2. Click on your name in the top right corner, select **Account Settings**.
3. Select **Integrations tab**.
4. Click the **Get API Key** button.
5. Once the text file has opened, save it to your desktop or someplace that you can retrieve easily.

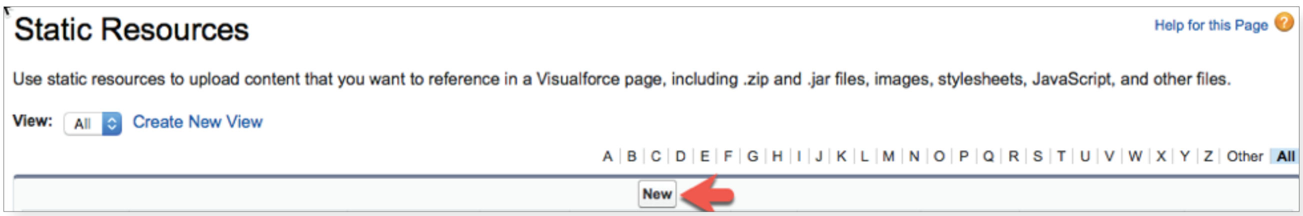


Upload Static Resource

1. Log into your Salesforce organization. Access the Salesforce Setup.

2. In the quick find, search for Static Resources.

3. Select New.

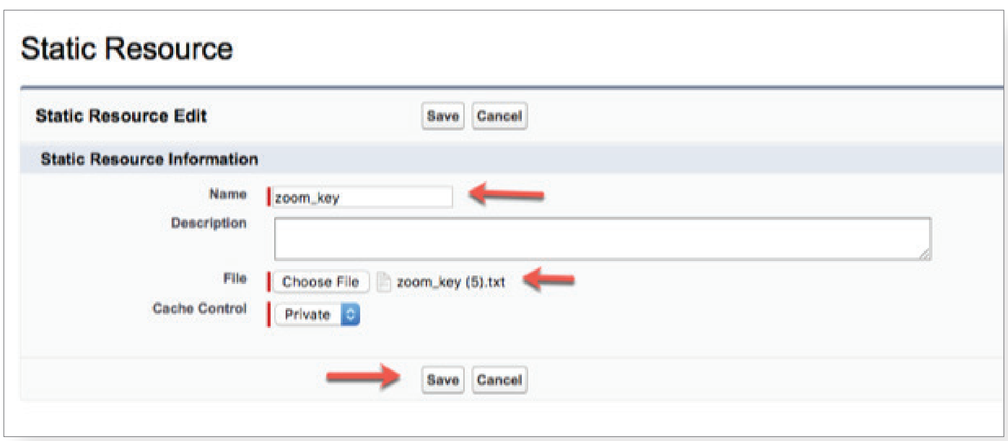


4. Configure the Static Resource as follows:

   a. Name: **zoom_key**

   b. Click **Choose File** and select the **zoom_key** previously saved.

   c. Cache Control: **Private**



Add Plugin (Visualforce Page) to Page Layouts

ZoomInfo for Salesforce Application provides a Visualforce page for Lead/Contact/Accounts records that can be added to page layouts to easily view the Person or Company profile.

1. Log into Salesforce. Open Salesforce setup.

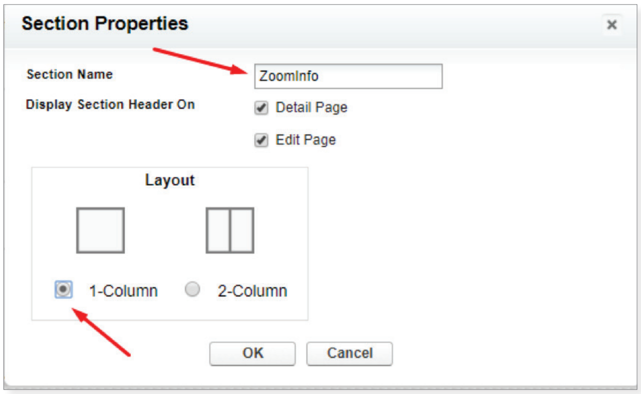
2. Search **Page Layouts**.

3. Select **Page Layouts** under either Leads, Contacts or Accounts.

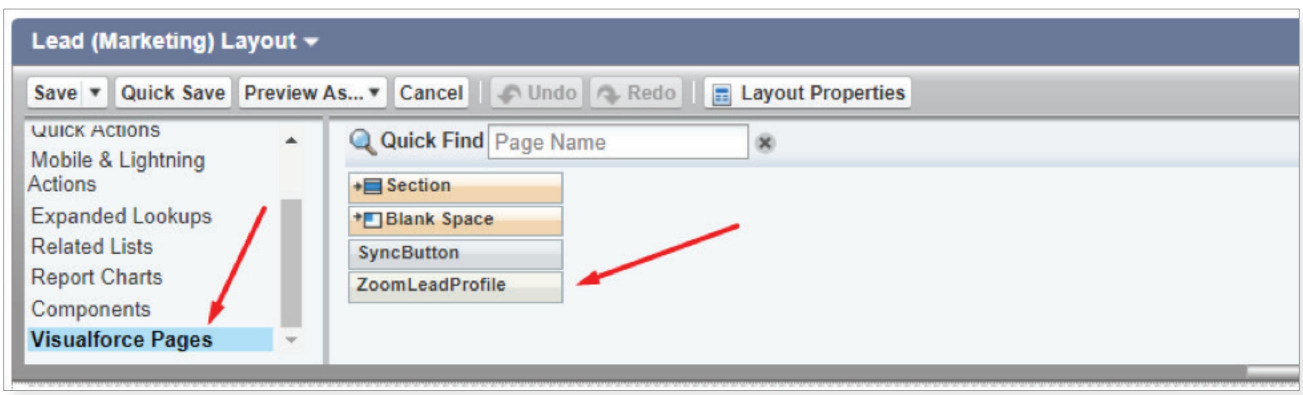
4. Select **Edit** next to the page layout you would like to add the Visualforce page to.

5. Click and drag a new Section onto the page layout. This section will be dedicated to the ZoomInfo application.

6. Name the section **ZoomInfo** and select 1- column Layout:



7. After creating the section, select Visualforce pages to add to the newly created section. Click and drag the ZoomInfo Visualforce page into the section.



Visualforce Pages:

- Lead: ZoomLeadProfile
- Contact: ZoomPersonProfile
- Account: ZoomAccountProfile

8. After adding the ZoomInfo Visualforce page, double click the Visualforce page or select the properties wrench in the top right hand corner. Adjust the height of the page to 535 pixels.

9. Save the page layout. Repeat the previous steps for the any other page layouts you would like to include the ZoomInfo profile.

ZoomInfo Clean

Create ZoomInfo Clean user

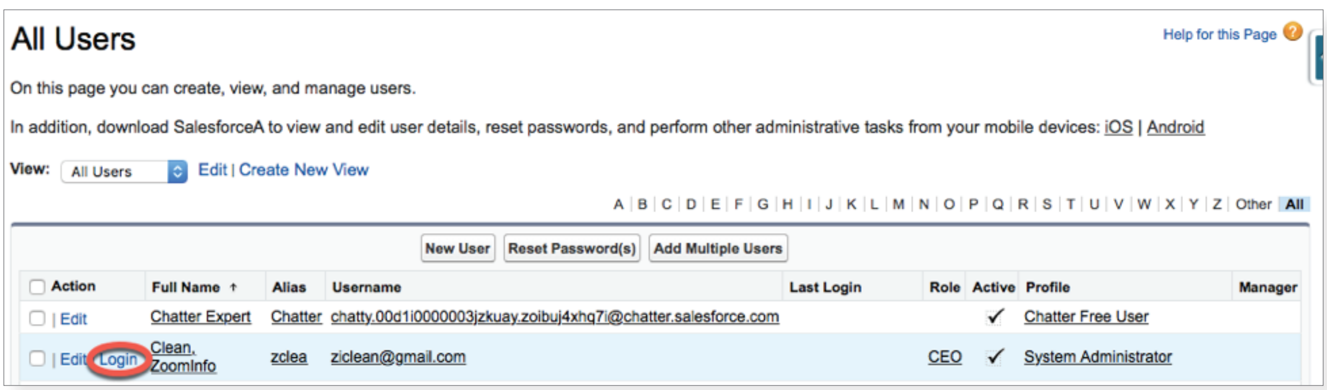
Since ZoomInfo Clean is an automated tool making bulk edits to your Salesforce data, we recommend creating a new Salesforce user dedicated to running Clean. By doing so, all edits made by ZoomInfo Clean will be fully auditable. This history of edits is important for reverting changes and tracking value returned by ZoomInfo Clean. **Required for ZoomInfo Clean Metrics Dashboard*

1. Log into Salesforce, and access Salesforce Setup

2. Search for Users, and select Users under Manage Users

3. Create a new Salesforce user. This new user should have read and write access to all objects and fields you intend to append using ZoomInfo Clean. The user should be set up as follows:

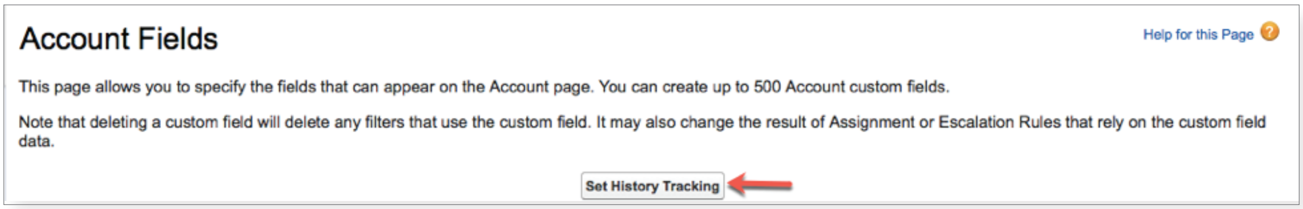
- First Name: ZoomInfo
- Last Name: Clean
- Role: System Administrator



Enable field tracking history

Enable field tracking history to keep a record of all of changes made by ZoomInfo Clean. Note: You will need to enable tracking history on a field by field basis. Salesforce limits field tracking to 20 fields per object. Consider which fields are most important to your team.

1. Log into Salesforce. Access Salesforce Setup.
2. Search Fields. Select Fields under Account.
3. Select Set History Tracking button located at top of page:

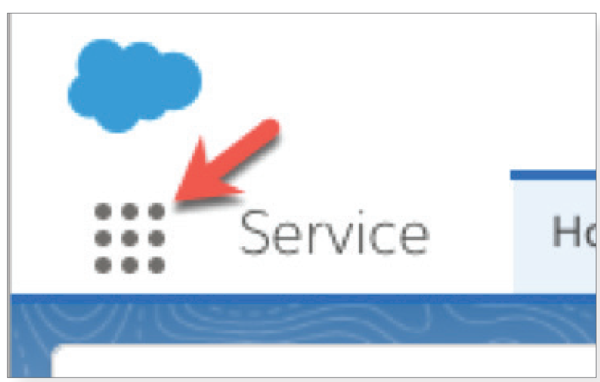


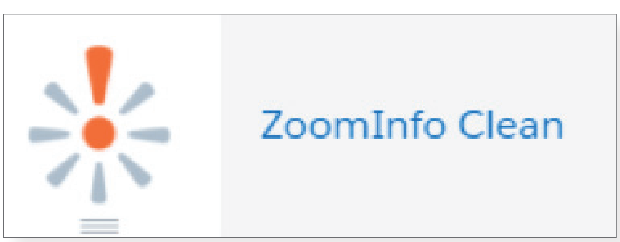
4. Select the fields that are most important to your organization to track changes.
5. Click **Save**.
6. Repeat these steps for Lead and Contact fields as well.

Open ZoomInfo Clean App

ZoomInfo Clean is a lightning application. It is also fully functional within Classic mode. To easily view the application, it is recommended to view ZoomInfo Clean within the Lightning Experience.

1. Log into Salesforce.
2. Switch to Lightning Experience
   a. Select your username in the upper right hand corner
   b. Select switch to lightning experience
   c. OR click "Switch to Lightning Experience" next to your username
3. Select App launcher in the upper left hand corner
4. Select ZoomInfo Clean application.

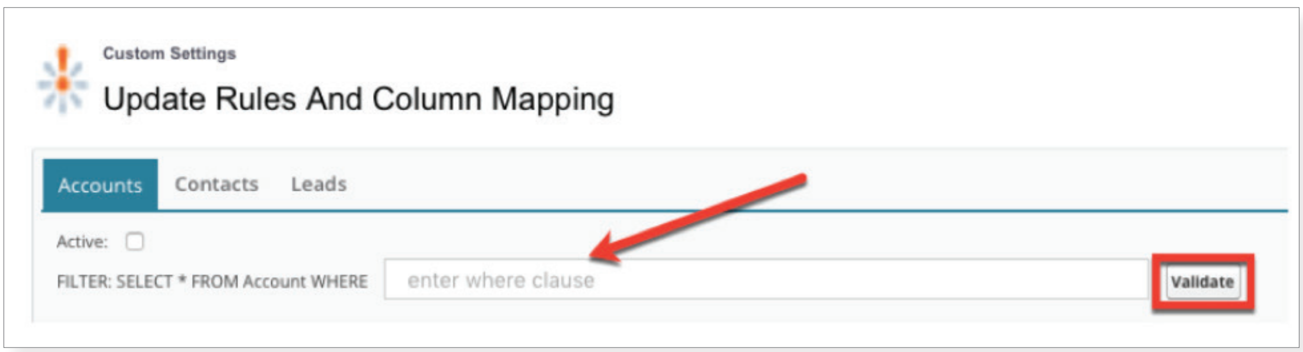




Configure ZoomInfo Clean

Once you have successfully opened ZoomInfo Clean, you are ready to configure the application. Click on the Settings tab.

1. **Log into ZoomInfo Clean.** Enter Partner Code and Password credentials. Click Login
2. **Enable ZoomInfo Clean.** ZoomInfo Clean can be enabled or disabled independently for each of the standard objects: Accounts, Contacts, and Leads. To enable clean for a particular object:
    a. Mark the checkbox, Enable 'Object' Clean, checked true.
    b. Select Save "Object' mapping located on bottom of page.
3. **Choose which records to Clean.** Decide which records you would like to be cleaned. We recommend cleaning all records. However, if you do not want to clean all records, you have option to filter records. ZoomInfo Clean leverages Salesforce Object Query Language (SOQL) to query which records to clean. Enter a valid SOQL clause into the 'enter where clause' text box.



Example SOQL statements:

Filter by picklist field (i.e. Lead source):

- LeadSource = 'Example Lead Source'

Filter by date field (i.e. Created Date):

- CreatedDate >= 2017-01-01T00:00:00Z

Filter by Record Owner:

- Owner.Name = 'John Doe'

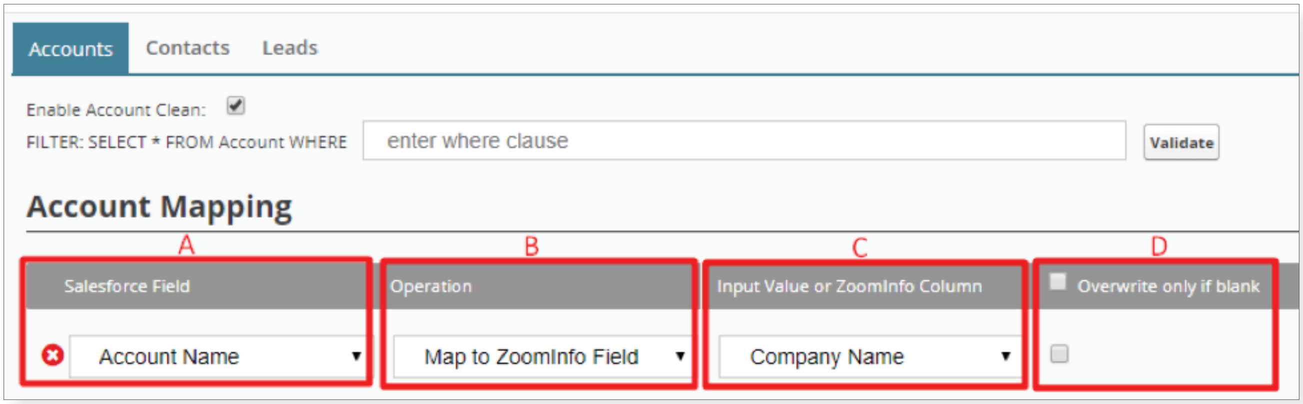
Filter by custom field:

- Custom_Field__c = 'Example Value'

Note: *More complex filter requirements may be best supported by a custom formula checkbox field.*

Note: *Salesforce Documentation for SOQL where clause syntax can be found here:*
https://developer.salesforce.com/docs/atlas.en-us.soql_sosl.meta/soql_sosl/sforce_api_calls_sosl_where.htm

4. **Map ZoomInfo data to Salesforce Fields.** Specify which ZoomInfo data points you would like returned and the Salesforce fields you would like them to write to.



A. Salesforce field: Select which Salesforce field you would like to write to.

B. Operation: Select the operation that best suits the data you would like written to this Salesforce field.
   i. Map To ZoomInfo Field: Map to one of the ZoomInfo data points
   ii. Do Not Import: Do not import this data point
   iii. Provide Value: Provide a fixed value to import

C. Input Value or ZoomInfo Column: Select which ZoomInfo data point you would like returned or provide a static value to be written.

D. Overwrite only if blank: When checked true, this data point will only populate blank (empty) fields. When unchecked, the mapped Salesforce field will be overwritten by the ZoomInfo data regardless if empty or not.

Suggested Best Practices for Mapping

- All dedicated ZoomInfo Custom Fields should be set overwrite (Example: ZI First Name)
- Any standard fields set to overwrite, should have field tracking history enabled
- Set the Person has Moved managed field to always overwrite
- Create a custom field for ZoomInfo Company Name. Map to Company Name for both Lead and Contact Clean, set to overwrite in addition to any standard field mapping for Company Name

- Create and map a field for ZoomInfo Company ID on the Lead & Contact Objects
- Create a field for ZoomInfo Last Verified Date and map to Person Last Updated Date for Lead and Contact Clean
- If mapping ZoomInfo data to restricted picklists, your Implementation Specialist can provide detailed output values for varied data points
- The 5 address fields are treated as unique data points, independent of the others.
  - If you elect to only fill blanks on standard address fields, this can create malformed addresses if ZoomInfo returns data for an alternate location
  - Be conscious of Person location vs Company location
  - If you choose to overwrite your standard fields or choose to only fill blanks, please enable field history tracking
  - If you do not want to overwrite your address data, please create 5-10 custom fields to capture ZoomInfo's Person and or Company location data
- If capturing Person Job Function and Person Management Level, map your desired SFDC field a second time for each referencing the ZI Calculated Job Function & Calculated Management Level. Set each to only if blank.

5. **Configure Conversion Mapping between Salesforce Objects & ZoomInfo.com:** Capturing & maintaining respective ZoomInfo Person & Company ID's between applications improves match rates and is critical to ensuring you're not being charged multiple times for the same data across applications.

   A. For Salesforce Lead to Account and Lead to Contact conversion mapping.

      i. Log into Salesforce. Access Salesforce Setup.

      ii. Search Fields. Select Fields under Leads.

      iii. Select Map Lead Fields button located by Lead Custom Fields & Relationships:

         1. Lead to Account Conversion

            a. Custom Field ZoomInfo Company ID -> Managed Field ZoomInfo ID (zisf__zoom_id__c)

         2. Lead to Contact Conversion

            a. Managed Field ZoomInfo ID (zisf__zoom_id__c) -> Managed Field ZoomInfo ID (zisf__zoom_id__c)

            b. Custom Field ZoomInfo Company ID -> Custom Field ZoomInfo Company ID

B. For Exports from the ZoomInfo Web Platform to SFDC
    i. Log into ZoomInfo. Access Admin Portal.
    ii. Click Integrations. Select Manage under Salesforce.
    iii. Select Mapping located at top of page.
    iv. Verify and Save before moving to the next object.
        1. Account Mapping
            a. ZoomInfo Company ID -> Salesforce ZoomInfo ID
        2. Contact Mapping
            a. ZoomInfo Person ID -> Salesforce ZoomInfo ID
            b. ZoomInfo Company ID -> Salesforce ZoomInfo Company ID
        3. Lead Mapping
            a. ZoomInfo Person ID -> Salesforce ZoomInfo ID
            b. ZoomInfo Company ID -> Salesforce ZoomInfo Company ID

C. For non-SFDC Enrichment Apps and Exports from the ZoomInfo Web Platform which Sync to SFDC, ensure that ZoomInfo Person ID's and Company ID's are being captured on Export or Enrich and sync'd from the external platform to the Managed ZoomInfo ID (zisf__zoom_id__c) Fields for each object as detailed above.

6. **Single Record Testing:** Perform single record tests to confirm your mapping preferences support your data management strategy for recurring enrichment.

    A. Login as the ZoomInfo Clean Admin User if you've chosen to leverage one for Clean.
    B. Extract the unique SFDC ID from the URL for each test record and create the associated filter query for each object.
        i. Example: If the record URL is https://na57.salesforce.com/0014000000GXZS0, the respective filter query will be defined as (ID = '0014000000GXZS0')
    C. Navigate to the ZoomInfo Clean Settings tab for the respective object and input your filter in the 'enter where clause' text box.
    D. Click the validate button. If you've done this correctly, a green confirmation message will appear below stating "Rule accepted, number of records found in query: 1"
    E. Scroll down and click on the "Save Mapping" button at the bottom of the page. Wait for the Mapping Saved Successfully message to appear.

F. Click the “Run Clean Now” button in the Clean Scheduling section.

G. Repeat steps 2. - 6. for the other 2 SFDC Objects

H. Navigate to the Clean Jobs tab and change the ‘view’ from ‘recently viewed’ to ‘all’.

I. Click into each Clean Job to confirm Job Status is ‘complete’ and that the error log is blank.

J. Navigate to each record to view the results. Consider modifying your page layouts to display the Enriched Managed & Custom fields related to Clean

7. **Scheduling and Running Clean.** ZoomInfo Clean provides the options to run clean immediately, or schedule future recurring clean runs. Clean schedules are customizable by object. The following settings at the bottom of the Settings tab.

Note: *Be sure to log in as ZoomInfo Clean user before saving or running Clean jobs.*

A. **Run Clean Now**

i. Immediately run Clean by clicking the Run ‘Object’ Clean Now button

B. **Schedule Clean**

i. Select which days of the week you would like Clean to run

ii. Select the desired start time for Clean to run *(Timezone is dependent on user)*

iii. Select **Save ‘Object’ Schedule** button to save Clean schedule

iv. **Next Scheduled run.** Displays time of next scheduled Clean job.

v. **Last Completed Run.** Displays completion time of most recent Clean run.

vi. **Status:**

1. **Inactive:** No future Clean job scheduled

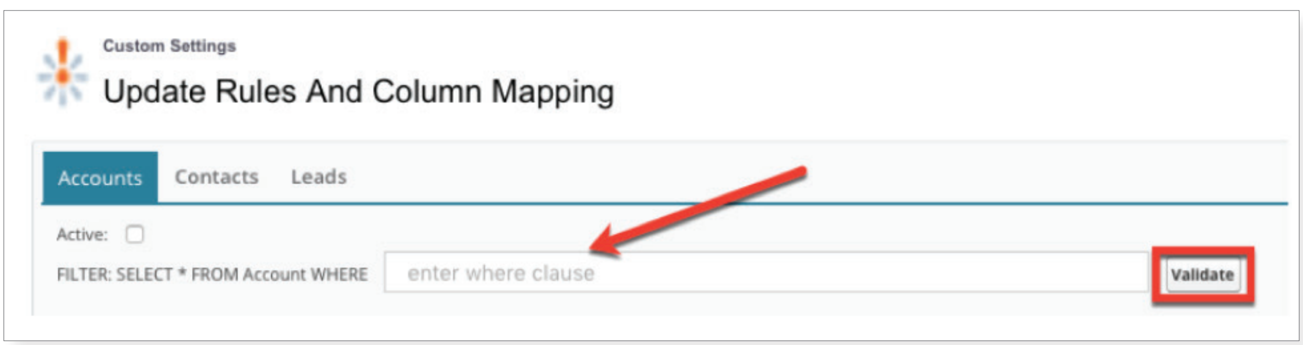
2. **Queued:** Clean job is scheduled to run

3. **Processing:** Clean job is currently running

ZoomInfo Complete

ZoomInfo Complete enriches data as records are created in Salesforce. ZoomInfo Complete can be configured within the **ZoomInfo Complete** salesforce tab.

1. **Log into ZoomInfo Complete:** Enter Partner code and Password credentials. Click **Login**
2. **Enable ZoomInfo Complete.** ZoomInfo Complete can be enabled or disabled independently for each of the standard objects: Accounts, Contacts, and Leads. To enable clean for a particular object:
   A. Mark the checkbox, Enable 'Object' complete, checked true.
   B. Select Save "Object' mapping located on bottom of page.
3. **Choose which records to Complete.** Decide which records you would like to be completed. If you do not wish to complete all records, you have option to filter. Enter a SOQL where clause in the text box shown below to determine which records to clean. After entering filter language, click **Validate** to verify proper syntax.



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Filter by custom field:

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Note: *Salesforce Documentation for SOQL where clause syntax can be found here:*
https://developer.salesforce.com/docs/atlas.en-us.soql_sosl.meta/soql_sosl/sforce_api_calls_sosl_where.htm

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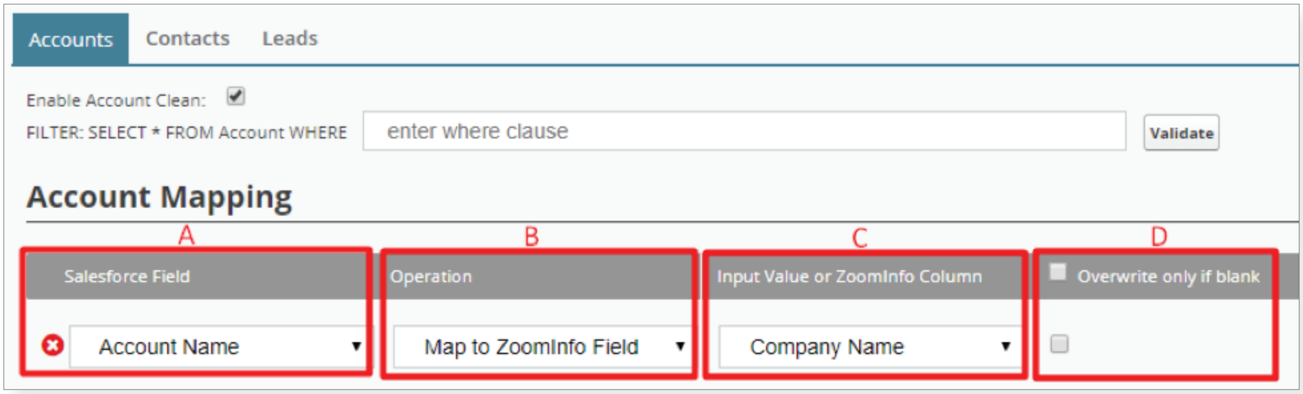

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B. **Operation:** Select the operation that best suits the data you would like written to this Salesforce field.

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   ii. Do Not Import: Do not import this data point
   iii. Provide Value: Provide a fixed value to import

C. **Input Value or ZoomInfo Column:** Select which ZoomInfo data point you would like returned or provide a static value to be written.

D. **Overwrite only if blank:** When checked true, this data point will only populate blank (empty) fields. When unchecked, the mapped Salesforce field will be overwritten by the ZoomInfo data regardless if empty or not.

Considerations

Review and understand the Salesforce configuration as it relates to your specific organization. ZoomInfo Clean and Complete will work in accordance with and abide by the setup of your Salesforce organization. Take into consideration:

- **Required fields:** Which Accounts/Leads/Contacts fields are required to save a record?
- **Validation rules:** Restrict values for fields on Accounts/Leads/Contacts based on Admin controlled criteria.
- **Workflows:** Workflows perform certain actions based on specific criteria. Changing Account/Lead/Contact data can fire these workflows. Understand the implication of having field values updated.
- **Process builder:** Are there automated processes dependent on Account/Lead/Contact fields?
- **Flows:** Understand active flows with Accounts/Leads/Contacts object.
- **Duplicate/Matching rules:** Depending on the configuration of these rules, Clean and Complete edits may be prohibited in an effort to prevent duplicate records. This includes any custom or 3rd party duplicate catching/prevention process.
- **Field level security:** Fields of interest must have read and write access in order for ZoomInfo to append the field.
- **Apex triggers and classes:** Thoroughly understand the custom code surrounding updating Account/Lead/Contact fields. What is the impact and restrictions of updating such fields?

FAQ

Authentication error

- Indication: Error seen in Clean logs, job ends after 100 records.
- **Resolutions:**
  - Re-login with PC and Password

Clean/Complete/Update failed for some or all fields

- Indication: Missing data in mapped fields (Clean/Complete status unchanged)
- **Resolutions:**
  - Check Mapping. Ensure all fields are properly mapped
  - Check Duplication process. Does customer use duplicate catching rules, validation rules, or any custom code that prevents updates?
  - Check field level security. The field in question must be visible to the profiles attempting the update
  - Check the datatype of the fields mapped. In most cases, the datatype will be Text. In the case of description and person education history, the datatype will have to be a Long Text Area to accommodate the length of strings >255 characters
  - Try to make the update manually. Simulate the update by editing the record with the data that would be returned by ZoomInfo. Whatever error was returned should also be returned when making the change manually.
  - Navigate to Salesforce Setup and search for "Apex Jobs". Review the list for any failed jobs related to the application.

Clean Status Values

- Clean: Matched & Updated. 1 of your total Clean limit charged.
- In Sync: Matched & confirmed correct, nothing to be updated. 1 of your total clean limit charged.
- Different: Matched and we can update data, but haven't updated all of the data points available because of mapping settings. 1 of your total clean limit charged.
- Not Found: No match made to Person nor Company. No charge.

- Company Clean Only: Only Company side Data has been returned. This can be for 2 reasons. 1. We do not have a match for the individual. Or 2. We have a match for the individual but have withheld this data due to your ZoomInfo Last Verified Date settings. 1 of your total clean limit charged.
- Error: There was an error in attempting to Clean the record. No charge
- Not Compared: Default value before Clean has run (will only appear for records that have been created after Clean was installed). Has not been processed by Clean. No Charge.
- - : Default value for status if the Lead/Contact/Account already existed before Clean was installed. Has not been processed by Clean. No Charge.

Complete Status Values

- Completed: Matched & Updated. 1 of your total Complete limit charged.
- Not Found: No match made to Person nor Company. No charge.
- Company Complete Only: Only Company side Data has been returned. This can be for 2 reasons. 1. We do not have a match for the individual. Or 2. We have a match for the individual but have withheld this data due to your ZoomInfo Last Verified Date settings. 1 of your total Complete limit charged.
- Error: There was an error in attempting to Complete the record. No charge
- Not Compared: Default value before Complete has run (will only appear for records that fall outside of your filter criteria). Has not been processed by Complete. No Charge.
- - : Default value for status if the Lead/Contact/Account already existed before Complete was installed. Has not been processed by Complete. No Charge.

Replicating the Clean Mapping into Complete or Complete Mapping into Clean

- Navigate to Salesforce Setup and do a quick search for “Tabs”
- Click on the new button for “Custom Object Tab”
- Create a custom object tab for ZoomInfoInboundSetting
- Create a custom object tab for ZoomInfoCleanSetting
- Open both tabs and copy/paste the mapping settings for each object from ZoomInfoCleanSetting into ZoomInfoInboundSetting or vice versa.
- Save changes and open the Standard Tab’s to confirm your settings were replicated properly.
- Delete the custom object tabs from step 3 and 4 and make any required outstanding modifications to the mapping using the dropdowns in the standard tabs.