

# Implementation Guide

# **ZoomInfo for Salesforce**

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# Introduction

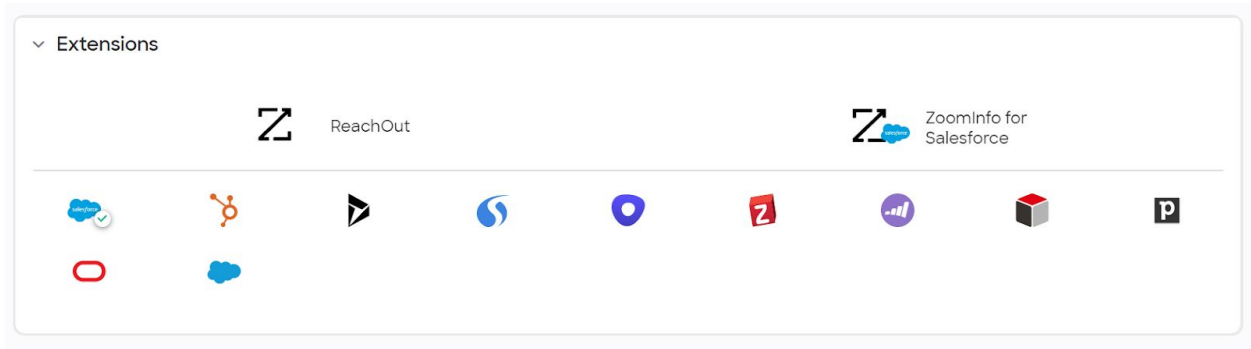
ZoomInfo for Salesforce helps demand generation specialists, marketing and sales ops professionals, and sales leaders reach leads faster with the most accurate contact information within the preferred Salesforce workflow.

With ZoomInfo for Salesforce, users can:

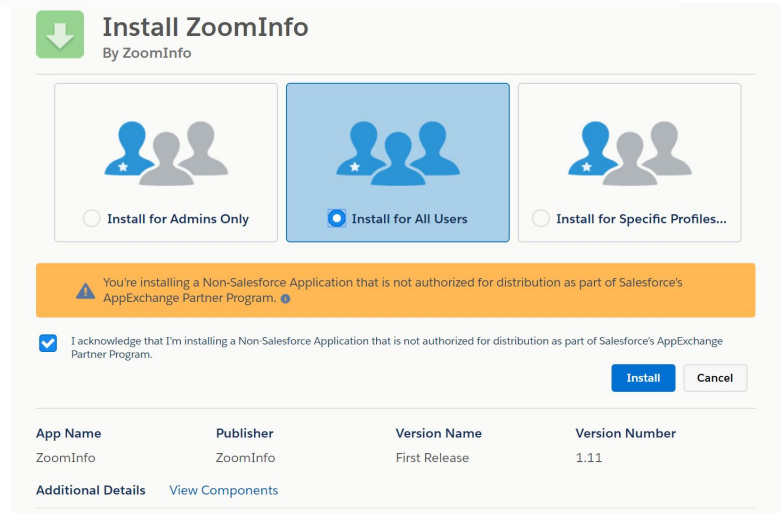
- Search and import ZoomInfo's contact and company data
- Update data on existing leads, contacts and accounts
- Administer field mapping settings and data object access

# Installation

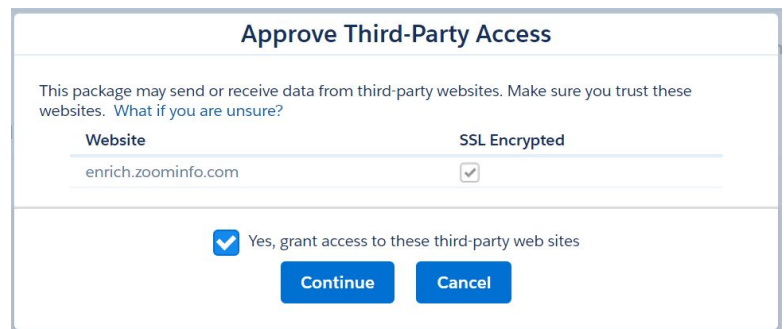
1. Login to [app.zoominfo.com](https://app.zoominfo.com).
2. Within the homepage, click on **ZoomInfo for Salesforce** under Extensions.



3. Select **Install for All Users**, then click **Install**.



4. Check **Yes, grant access to these third-party web sites**, then click **Continue**.



5. Installation will begin.

# Granting Profile Access

## Edit Tab Access

Once the Zoominfo for Salesforce application has been successfully installed, we recommend adjusting which profiles will have access to the ZoomInfo Salesforce tab.

1. Navigate to **Setup** within Salesforce. Search for **Profiles**. Within Manage Users, select **Profiles**.
2. Click **Edit** next to each profile you wish to hide the ZoomInfo tab from.
3. Within the profile settings, scroll down to the **Tab Settings** section.
4. Under the **Custom Tab Settings** header, you will find the ZoomInfo tab.
5. Using the dropdown menu adjacent to the tab, set the tab to **Tab Hidden**.
6. Click **Save**.
7. Repeat these steps for the other profiles you wish to Hide ZoomInfo tab from.

## Edit Page Layouts (Classic Mode)

ZoomInfo for Salesforce provides a visualforce page for lead, contact and account pages. In addition to the visualforce page, ZoomInfo creates a field called ZoomInfo ID which will track ZoomInfo's unique identifier for Contacts and Companies.

1. Within Salesforce **Setup**, search for **Page Layouts**.
2. Select **Page Layouts** under leads, contacts or accounts.
3. Select **Edit** beside the page layout you would like to add the visualforce page.
4. Click and drag a new Section onto the page layout. This section will be dedicated to the ZoomInfo application.

**Section Properties**

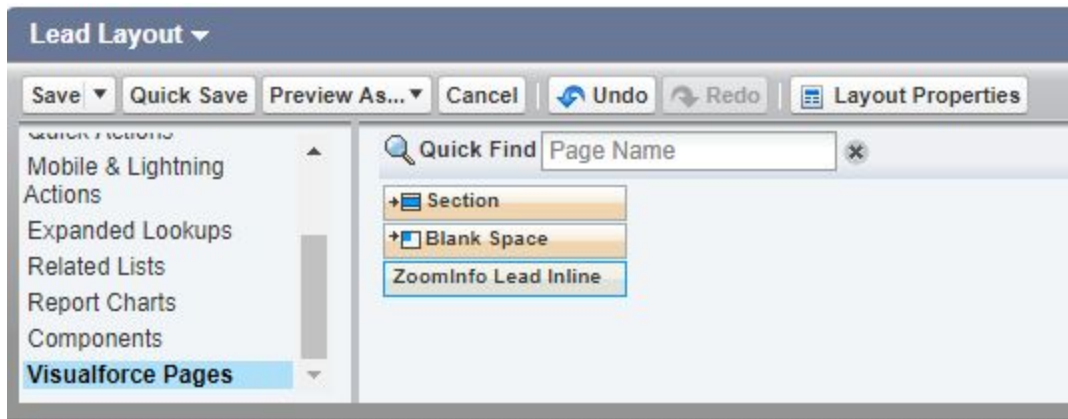
Section Name: ZoomInfo

Display Section Header On: ☒ Detail Page ☒ Edit Page

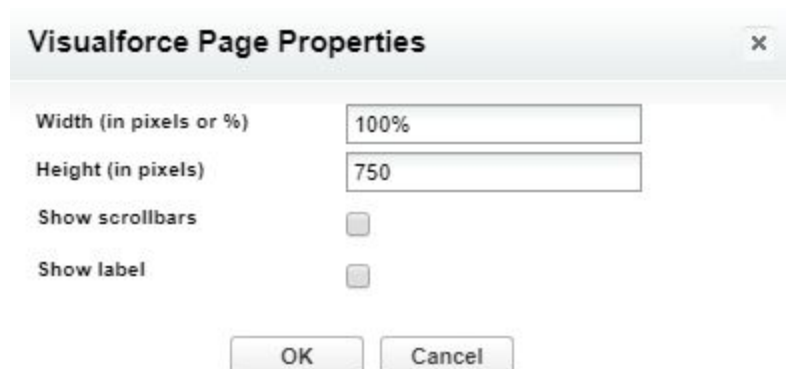
Layout: ☒ 1-Column ☐ 2-Column

OK Cancel

5. Name the section **ZoomInfo** and select **1-Column** as the layout.
6. After creating the section, select **Visualforce Pages** from the main navigation header.
7. Click and drag the ZoomInfo visualforce page onto the section.



8. Double-click the visualforce page or select the properties wrench in the top right corner. Adjust the height of the page to 750 pixels.



9. Within the **Fields** section, find **ZoomInfo ID**. Click and drag this field onto the page layout to make the ZoomInfo Id visible to your user.
10. Save the page layout. Repeat these steps for other page layouts you would like the ZoomInfo page to appear. Repeat these steps for contact and account page layouts, as well.

## Edit Page Layouts (Lightning Experience)

ZoomInfo for Salesforce provides a visualforce page for lead, contact and account pages. In addition to the visualforce page, ZoomInfo creates a field called ZoomInfo ID which will track ZoomInfo's unique identifier for Contacts and Companies.

1. Within Salesforce **Setup**, search for **Object Manager**. Click to Open Manager.
2. Select **Leads**.
3. Select **Record Pages**.
4. Select the record page you would like to add the ZoomInfo profile to.
5. Within the editor, click on the **Details** tab.  
If you would like to add the ZoomInfo profile to it's own tab, you can also add a new tab to your existing page by clicking **Add Tab** in the right sidebar.
6. Click and drag a new **Visualforce** component onto the page.
7. Select the ZoomInfo visualforce page.
8. Set the Height to 750 pixels.
9. Save the record page.

Page > Tabs

Default Tab

Activity

Tabs

≡ Activity

×

≡ Details

×

≡ Chatter

×

≡ News

×

Add Tab

# ZoomInfo Administration

The admin portal within the ZoomInfo tab will allow you to control which Salesforce objects your users have access to, and configure the custom mapping.

1. Open the **ZoomInfo** Salesforce tab.
2. Select the **Admin Portal** within the main navigation bar.  
(Note: Must be ZoomInfo Admin to access this functionality)
3. Select **Salesforce Settings** tab.
4. Within the **General tab**, select the objects your users will have access to create and update.
5. Within the **Mapping** tab, configure the custom mapping for Accounts, Contacts and Leads.

The screenshot shows the 'Mapping' tab for the 'Accounts' object. It features a table with four columns: 'ZoomInfo Field', 'Salesforce Field', 'Example', and 'Update Option'. The 'ZoomInfo Field' column has dropdown menus for 'Name', 'ZoomInfo Company ID', 'Description', 'Street', 'City', 'State', 'Zip Code', 'Country', 'Website', and 'Phone'. The 'Salesforce Field' column has dropdown menus for 'Account Name', 'Zoominfo Id', 'Account Description', 'Billing Street', 'Billing City', 'Billing State/Province', 'Billing Zip/Postal Code', 'Billing Country', 'Website', and 'Account Phone'. The 'Example' column provides sample data for each field. The 'Update Option' column has dropdown menus for 'Complete if mis...' and 'Overwrite field'. There are also links for 'Back to default preferences' and 'Advanced' settings.

ZoomInfo Field	Salesforce Field	Example	Update Option
Name	Account Name	e.g. Zoom Information, Inc.	Complete if mis...
ZoomInfo Company ID	Zoominfo Id	e.g. 344589814	Overwrite field
Description	Account Description	e.g. Zoominfo is the most comprehensive...	Complete if mis...
Street	Billing Street	e.g. 307 Waverley Oaks Road, Suite 405	Complete if mis...
City	Billing City	e.g. Waltham	Complete if mis...
State	Billing State/Province	e.g. Massachusetts	Complete if mis...
Zip Code	Billing Zip/Postal Code	e.g. 02452	Complete if mis...
Country	Billing Country	e.g. United States	Complete if mis...
Website	Website	e.g. www.zoominfo.com	Complete if mis...
Phone	Account Phone	e.g. (781) 693-7500	Complete if mis...

- **ZoomInfo Field:** Use the dropdown to select which Zoominfo data you would like to return.
- **Salesforce Field:** Select the Salesforce field you would like to capture the ZoomInfo data point.
- **Update Option:** Choose the mapping behavior for updating existing records by selecting Overwrite (ZoomInfo will overwrite existing data) or Complete if missing (ZoomInfo will only fill blank fields).  
(Note: This configuration is made for each field independently)
- Select **Back to default preferences** to return to the default settings.
- Click **Verify and Save** to save the mapping configuration. Repeat these steps for Contacts and Leads.