

SAVE TIME FINDING THE RIGHT CONTACTS.

Try out the top 10 ZoomInfo Pro Tips and Tricks!

1. Search Basics: Use Boolean logic to increase the relevance of your search results. For example, entering the keywords *CFO OR Controller* returns results that include both terms. Searching for *CFO NOT Controller* will eliminate the results that include the search term or phrase to the right of the NOT. And, lastly, using ""(quotation marks) will deliver exact phrase matches.

2. Search by Title: Get the most comprehensive results when running a people search by using the Job Function categories in the **People Advanced Criteria** window rather than keywords.

3. Use Alerts: Alerts allow you to track changes to specific profiles, as well as people who meet certain criteria. For example, do you need to know when a CFO leaves or joins a software company? *Alerts can tell you!*

4. Use Lists: Click *Add to List* to save People and Companies of interest, that way you can easily access them in the future. Clicking Lists at the top of the page also allows you to retrieve files you have previously exported from ZoomInfo.

5. Export Your Data: The export feature allows you to export up to 100,000 records at one time into a .CSV file that you can then save to your computer, and upload to other programs such as CRM or ATS.

6. Use the Industry Directory: In the **Company Advanced Criteria** window, open the Industry directory to search broad industries, or click the arrow to the left to see sub categories. You can then use the Industry Keywords field to refine the search even further.

7. Find Similar Companies: Quickly get a list of similar companies for a company you are viewing. Take a look at the **Similar Companies** section of the Company Profile for a list of companies that ZoomInfo believes to be similar to the company you have selected. If it's a small company that hasn't been mentioned on multiple web pages, ZoomInfo may not find similar ones.

8. Find Missing Email Address: Found a contact with no email address? Try running a search for Manager level contacts within the person's company to get the pattern for their email addresses.

9. Use the filters on the People and Companies tabs: Sort your results a number of different ways, filter by certain contact information, or limit your results to records updated within a certain period of time.

10. Save a Location: Select locations in the **Location Advanced Criteria** window and use the *Save selected locations* feature so you can easily search that location in the future.