

TRAINING GUIDE

Data Integrations for Salesforce

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Getting Your Data out of Salesforce

Importing Data from Salesforce to ZoomInfo

1. Once you have logged into ZoomInfo, click on “My Lists,” located on the upper right-hand side of the page.
2. Next, click “Import to My Lists.” A dark grey rectangular button with a white icon of a document with an arrow pointing to the right, followed by the text "Import to My Lists" in white.
3. When the login box appears, you will need to enter your Salesforce credentials. To avoid entering your Salesforce credentials every time you use this application, check the box that says “Remember my credentials.”

Note: To use the ZoomInfo Data Integrations tool, Salesforce API access must be enabled within your environment. This is a standard feature for Salesforce Enterprise Edition customers. Group Edition and Professional Edition customers will need to contact their Salesforce Account Executive to have Salesforce API access enabled.



Signing into Salesforce from ZoomInfo

1. Enter your Salesforce username. If you have forgotten your username, this [video](#) from Salesforce can assist you.
2. Enter your Salesforce password. If you have forgotten your password, go to the Salesforce login screen and click on "[forgot my password?](#)"
3. Select "Production" in the drop down menu. For testing and development purposes, you can also connect to your "Sandbox" environment.

Import from Salesforce

Please enter your Salesforce credentials:

Salesforce Username* Username@YourDomain.com

Salesforce Password*

Salesforce Environment Production

Security Token xxxxxxxxxxxxxxxxxxxxxxxxxxxxx
[How do I get the security token?](#)

Remember my credentials

Note: your credentials will be encrypted and saved in ZoomInfo for your use during import only. ZoomInfo will only access the data you import.

Next >

4. To avoid having to re-enter your Salesforce credentials in the future, check the box that says "Remember my credentials."
5. Security token: A security token is an automatically generated key that you use with your password, or in a separate field, when you use a client application (ZoomInfo) to connect with Salesforce.

If you do not have your existing security token on hand, you will need to reset your security token by following the [instructions](#) outlined by Salesforce.

To avoid having to enter your security token during the import and export process, you can whitelist ZoomInfo in your Salesforce environment. Get additional details on how to do this on the [Salesforce website](#).

Note: To find and whitelist the ZoomInfo IP server address, you must be a Salesforce administrator.

To Find the ZoomInfo IP Server address:

1. Login in to your Salesforce account.
2. Click on your name located on the upper right-hand side of the page. Then choose "Setup" from the drop down menu.
3. Navigate to "Administration Setup" located on the lower left-hand side of the page. Then click "Manage User."
4. Select "Login History" from the drop down menu.
5. Next, go back to ZoomInfo and click on "My Lists." Then click on "Import to My Lists." When prompted, attempt to log into your desired Salesforce environment, leaving the security token blank. This will result in an error on the ZoomInfo side.
6. Go back to your Salesforce "Login History" screen and find the entry that shows your attempted login. The Source IP Column associated with that login attempt contains the IP address you need to whitelist.

To Whitelist the ZoomInfo IP Server:

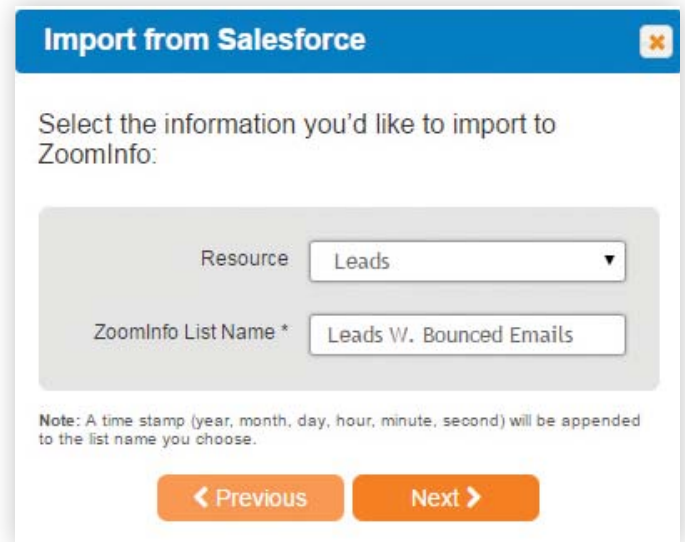
1. Copy the Source IP address. Then navigate to "Administration Setup" located on the lower left-hand side of the page and click "Security Controls."
2. Next click "Network Access." At the top of the page, click the "New" button.
3. Paste the Source IP number into the "Start IP Address" box. Repeat this step for the "End IP Address" box.
4. Add a description of the IP address. (Ex: ZoomInfo Data Integrations).
5. Click "Save."

Zoominfo is now whitelisted in your Salesforce environment and you no longer need to enter a security token when accessing the application.

Selecting a Resource and Naming a File

1. From the drop down menu, choose the type of resource you are importing. You can choose, "Leads," "Contacts," or "Accounts."
2. Create a name for your list. Please note, ZoomInfo will add a time stamp to your file that will follow the format "year, month, day, hour, minute, second."

(ex: MarketingExecutives_20150731110483)



Filtering Your Data

Select the criteria for the Salesforce records you want to import.

Some examples include:

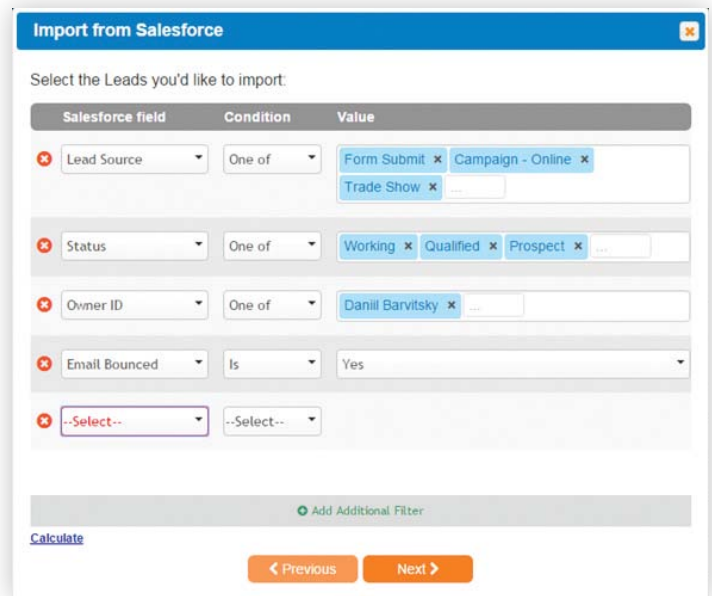
- All Leads by a particular sales rep, campaign source, lead status, or lead score.
- All Closed won accounts by geographic location or within a specific time frame.
- All Contacts with last activity date before "X," by vertical, or with a flag like bounced email set to true.



Filtering Your Data (Continued)

You may also add additional rows to further specify your import criteria by clicking on "Add Additional Filter," which is located just above the "Next" button. Please note, you can also remove fields by clicking the orange "X" for each row.

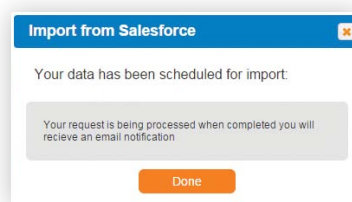
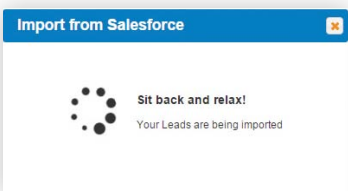
Once you are finished selecting your filters click "Calculate." This will tell you how many records you are preparing to import.



Note: You cannot import more than 5,000,000 records at one time.

Processing of Imports

Imports of less than 4,000 records are processed on the spot. This typically takes one minute or less. Imports of more than 4,000 records take some time to be processed. You will be notified via email once processing is complete.



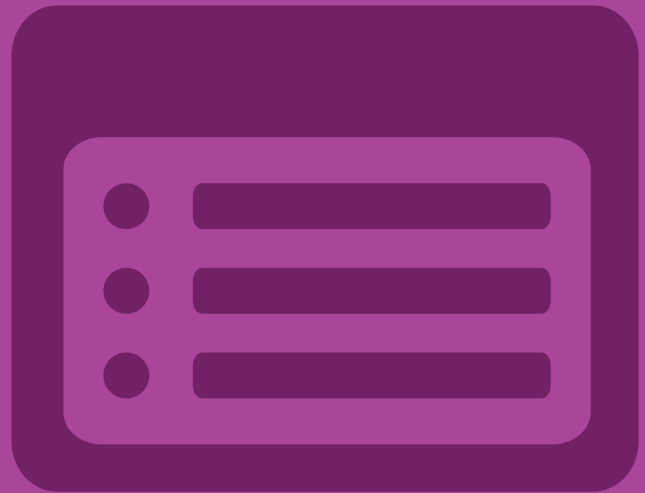
Troubleshooting Import Errors

In the event that your import failed, or an error occurred, you will be notified via email. A detailed error log will be attached. Depending on the nature of what occurred, you may want to notify your Salesforce administrator to assist you in troubleshooting. You may also contact our Customer Success team at 781.693.7575, or by email at customersuccess@zoominfo.com.

Leveraging Your Salesforce Data in ZoomInfo

Using Data Integrations with List Builder

List Builder enables you create to highly targeted B2B contact lists to fuel your sales pipeline and marketing campaigns. Data Integrations makes it easy to find new leads for your key accounts while suppressing against your existing leads and contacts to help avoid duplicate entries and repeat purchases.



1. To begin, make sure you have imported a current key accounts list or suppression file from Salesforce to the “My Lists” page. If you have not done this, refer back to the section [“Getting Your Data out of Salesforce”](#) for detailed instructions on how to proceed.
2. Once your Salesforce data has been imported, click “Build,” located on the upper right-hand side of the page. This will take you to the List Builder tool.

List Builder Features



Avoid duplicating information

To ensure List Builder only provides you with new data, import your existing Leads, Accounts, and Contacts from Salesforce for use as a suppression file.



Create highly targeted lists from scratch

Define specific criteria through which List Builder can filter contacts and return data, which can then be seamlessly exported to Salesforce.



Reach your targeted prospects

Import a list of your key accounts from Salesforce and find specific contacts in the companies you care about most. You can define demographic parameters for your results and limit the number of contacts within each company that are returned by List Builder.

Suppression Files

To avoid re-purchasing contacts and duplicating information in your Salesforce database, it is crucial that you upload a suppression file when you reach the shopping cart page during your transaction in List Builder.

After you preview and name your file in List Builder, you will be taken to the page where you can submit your request. Before submitting your query, apply a suppression file by clicking "Upload/Select a File." Then choose "Select from My Lists" and click on the previously imported Salesforce file you wish to use.

To ensure the best results, ZoomInfo suggests mapping the "First Name," "Last Name," "Job Title," and "Company Name" columns from your imported file to the corresponding ZoomInfo data points under the column labeled "Our Best Guess."

Note: You can apply multiple suppression files against the same List Builder request.

How to Use Key Accounts in List Builder

List Builder allows you to restrict your search to a list of companies you consider to be your target accounts. ZoomInfo refers to this as a “key account list” (Match File). All people records returned by List Builder are connected to the list of companies you provided.

1. To begin, make sure you have imported a current key accounts list or suppression file from Salesforce to the “My Lists” page. If you have not done this, refer back to the section [“Getting Your Data out of Salesforce”](#) for detailed instructions on how to proceed.
 2. Next, click “Build,” located on the upper right-hand side of the page. This will bring you to the List Builder tool where you will leverage your key Accounts import to find new leads.
 3. Next, choose what type of contact information MUST be included in the data returned by List Builder. You may choose “Email,” “Phone (direct),” “Phone (any),” “Phone AND Email,” or “Phone OR Email.” When you are finished, click on the right arrow or on the box that says “Match Files.”
 4. Once you are in “Match Files,” you will want to access your key accounts list. To do this, click on “Upload/Select a File.”
- Then choose “Select from My Lists,” and click on the previously imported Salesforce file you wish to use.
5. Map columns such as “Company Name” and “Company Domain Name” from your key accounts import file to the corresponding ZoomInfo value. To ensure a successful match, we recommend mapping a minimum of two fields.
 6. Next, continue through the prompts in List Builder and define the management levels, job functions, and locations for the list of new contacts you will be generating.

How to Use Key Accounts in List Builder (Continued)

7. Preview your query and make refinements as needed. Once satisfied, click the green “Save Query” button.
 8. Before submitting your request, click “Upload/ Select a File” to apply a suppression file. Then choose “Select from My Lists,” and click on the previously imported Salesforce file you wish to use. You can repeat this process and apply multiple suppression files to the same List Builder query. We advise suppressing against both your Salesforce Leads and Contacts.
- Please note:**
The suppression file will not be applied to your purchased list, until after you submit your request. That means the “Record Counts,” “Total Records,” and “Total Unique Records,” in your shopping cart will not reflect the actual number of records that will be generated for your final list.
9. After uploading your suppression file, click the “Submit My Request” button on the right side of the page. We will notify you via email the moment your list is ready.
 10. Once your list is ready, you will want to export your new leads to Salesforce. For more details on how to do this, reference our step-by-step instructions on how to [export leads from List Builder to Salesforce](#).

Using Data Integrations with Insights

Insights allows you to analyze your data, identify your buyer personas, and replicate successful campaigns with additional contacts.

1. To begin, make sure you have imported current Leads, Accounts or Contact data from Salesforce to the “My Lists” page. If you have not done this, refer back to the section [“Getting Your Data out of Salesforce”](#) for detailed instructions on how to proceed.
2. Once your Salesforce data has been imported, click “Insights,” located on the upper right-hand side of the page.
3. Then click “Upload/Select a File” and choose “Select from My Lists.” Click on the previously imported Salesforce file you wish to use.
4. To ensure the best results, ZoomInfo suggests mapping the “First Name,” “Last Name,” “Job Title,” and “Company Name” columns from your imported file to the corresponding ZoomInfo data points, under the column labeled “Our Best Guess.”
5. When your Insights file is finished processing, you will receive an email notification. To retrieve your file, click on “Insights” located on the upper right-hand side of the ZoomInfo website. Then click on your file in the “Insights Request” section.

Insights Features



Company Segmentation

Run your Salesforce data through Insights to segment companies by industry, revenue, and employee size. Identify personas based on your segmentation and get new contacts matching your best buyers to replicate success.



Job Function

Run your Salesforce data through Insights to segment people by job function and management level. Identify personas based on your segmentation and get new contacts matching your best buyers to replicate success.



People per Company

Use Insights to identify how many of your contacts or leads are tied to your targeted accounts and create lists of additional persons within those organizations that match your target demographic.



Persona Finder

Identify segments within your database across multiple criteria. Create lists of additional persons who match the persona of your choice.

Using Data Integrations with Enhance

Enhance enables you to analyze the contents of your Salesforce database and fill in any missing contact information, firmographic data, and more.



1. To begin, make sure you have imported current Lead, Account or Contact data from Salesforce to the “My Lists” page. If you have not done this, refer back to the section [“Getting Your Data out of Salesforce”](#) for detailed instructions on how to proceed.
2. Once your Salesforce data has been imported, click on “Enhance,” located on the upper right-hand side of the page.
3. Next, click “Upload/Select a File.” Then choose “Select from My Lists,” and click on the previously imported Salesforce file you wish to use.

Using Data Integrations with Enhance (Continued)

4. To Enhance your Salesforce Leads or Contacts, use “Person Enhance.” ZoomInfo will provide missing title, email, phone, and firmographic data.

In order for ZoomInfo to process your “Person Enhance” request, you need to map at least one of the following data points:

- Email Address
- First Name AND Last Name AND URL
- First Name AND Last Name AND Company Name
- ZoomInfo Person ID

5. To Enhance your Salesforce Accounts data, use “Company Enhance.” ZoomInfo will provide missing firmographic information such as website address, HQ location, revenue, and headcount.

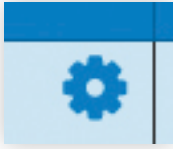
In order for ZoomInfo to process your “Company Enhance” request, you need to map at least one of the following data points:

- URL
- Company Name
- Email Address
- ZoomInfo Company ID

6. If you would like to filter the records that will appear in your output file, you may choose to do so from the pop up menu on your screen. You can then select the contact and company filters you would like to apply.

Shipping Data Back to Salesforce

Important Tips for Exporting ZoomInfo People and Company Data to Salesforce

1. To export data from ZoomInfo to Salesforce, navigate to the “My Lists” page and click on the gear icon next to the file you wish to export. Select “Export to Salesforce.” Note, you must first redeem your list for this option to appear. 
2. To ensure a successful data transfer, we recommend taking the following precautions:
 - Verify [Track Field History](#) has been enabled in your Salesforce environment.
 - If importing new leads, make sure you leveraged your existing Salesforce data as a **“suppression file.”** Failure to do so may result in duplicate entries in Salesforce.
 - If updating existing leads, accounts, or contacts, please confirm the ZoomInfo Enhance was executed on a current file imported from Salesforce. Failure to do so may jeopardize the quality of your export as updates are based on the Salesforce ID for each record.
 - ZoomInfo suggests assigning a value to a specific salesforce field. This will serve as a unique identifier associated with your import, and acts as a failsafe in the event you are not satisfied with the quality of your import.
3. Enter your Salesforce username and password. You will only be asked to do this if you did not check off the box that says, “Remember my credentials,” during a previous export. To avoid entering your credentials for future data transfers, check the box that says, “Remember my credentials.”

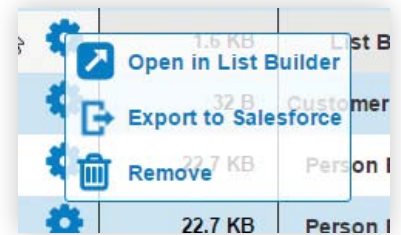
Important Tips for Exporting ZoomInfo People and Company Data to Salesforce (Continued)

4. Sending your list: When exporting your new leads from List Builder, remember to select the option that says “Send to Salesforce as new Leads.” If updating person or company data after using Enhance, choose “Update existing Leads or Contacts,” in step two of the export wizard.

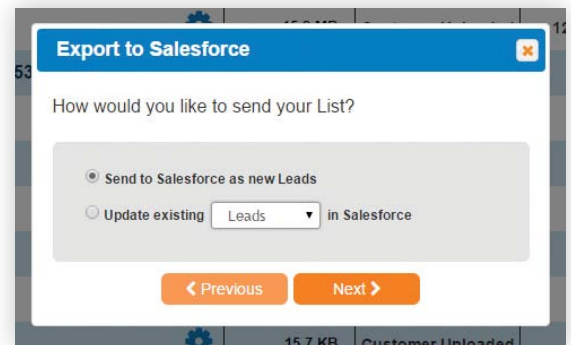
Note: You may not export more than 1,000,000 records at a time.

Exporting New Leads from List Builder to Salesforce

1. To export new leads from ZoomInfo to Salesforce, navigate to the “My Lists” page and click on the gear icon next to the list you wish to export. Select “Export to Salesforce.” Note, you must first redeem your list for this option to appear.



2. Enter your Salesforce login credentials and click “Next.” To avoid having to re-enter your login credentials each time you export, click the “Remember my credentials,” box. Then select “Send to Salesforce as new Leads.”

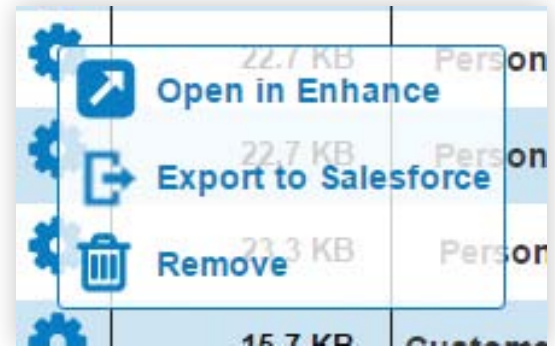


3. Map the specific Salesforce columns to the desired data from ZoomInfo, or to custom input values to fit your needs. For more details, refer to the section titled [“Column Mapping.”](#)

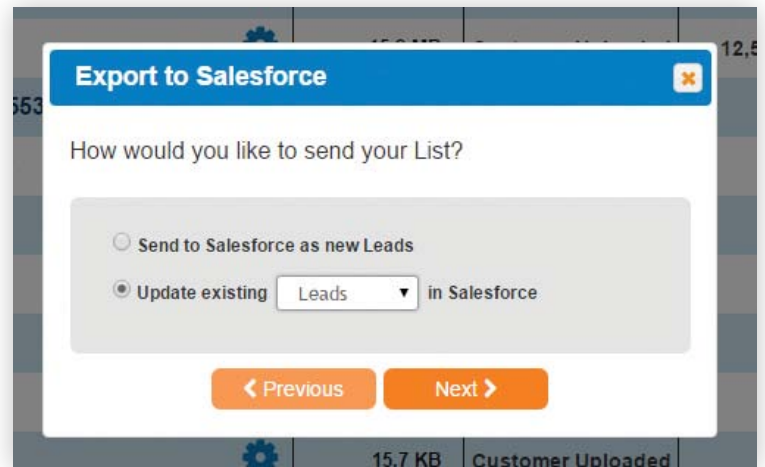
Note: ZoomInfo suggest assigning an input value to a specific Salesforce field. This will serve as a unique identifier associated with your import, and acts as a failsafe in the event you are not satisfied with the quality of your import.

Exporting Enhanced Leads, Accounts, and Contacts to Salesforce

1. To export enhanced records from ZoomInfo to Salesforce, navigate to the “My Lists” page and click on the gear icon next to the file you wish to export. Select “Export to Salesforce.” Note, you must first redeem your list for this option to appear.



2. Enter your Salesforce login credentials and click “Next.” To avoid having to re-enter your login credentials each time you export, click the “Remember my credentials” box. Next, choose “Update existing Leads or Contacts.” Note, Enhance is the only ZoomInfo feature for which you will select this option.



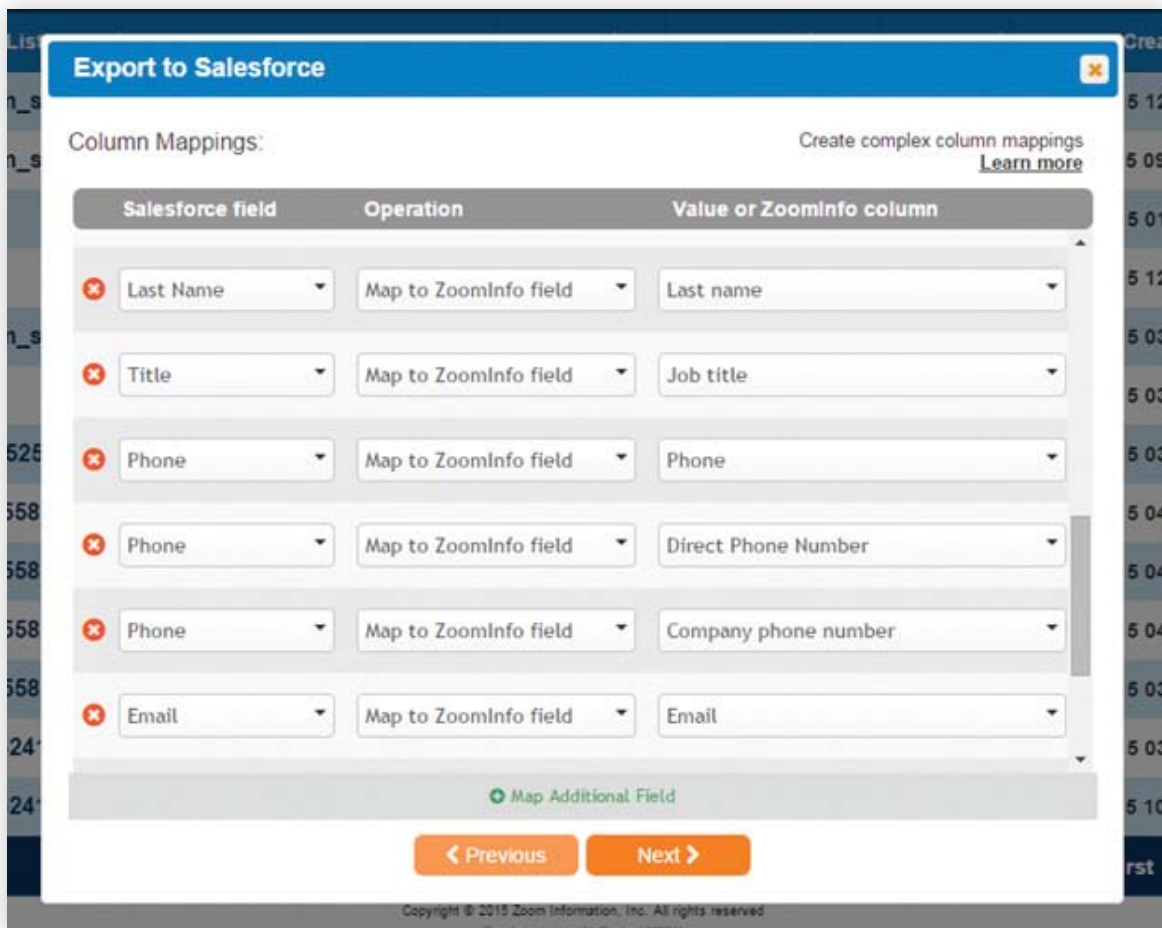
3. Map the specific Salesforce columns to the desired data from ZoomInfo, or to custom input values to fit your needs. For more details, refer to the section titled [“Column Mapping.”](#)

Note: ZoomInfo suggests confirming [“Track Field History”](#) is turned on in your Salesforce environment. You should also assign an input value to a specific Salesforce field. This will serve as a unique identifier associated with your import, and will provide a failsafe in the event that you are not satisfied with the quality of your report.

Column Mapping

Data Integrations includes a sophisticated column mapping feature to ensure that the data transferred back to Salesforce fits your specific needs.

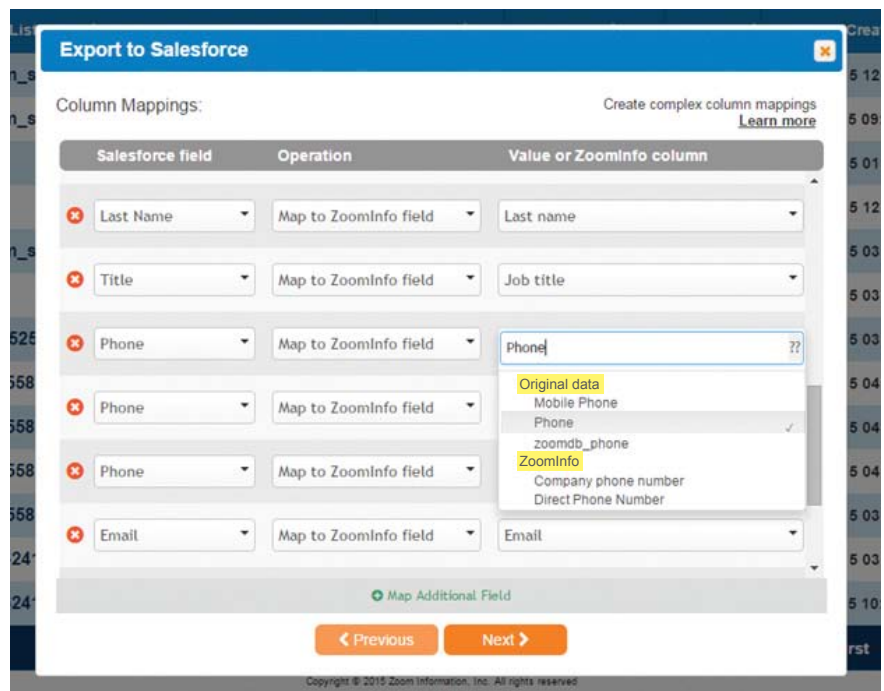
1. Start by selecting the Salesforce fields you wish to write to, using the drop down menu in the left column.
2. Using the middle column, select the operation that best fits your needs.
3. In the right column, select the Original Salesforce data, ZoomInfo column, or a specific input value you wish to map to Salesforce.



Column Mapping (Continued)

ZoomInfo supports complex conditional mapping to a single Salesforce field. Below is a detailed example of how to do this using phone numbers. In this example, the customer does not want to overwrite any existing data in their contact records, but would like to insert a direct dial phone number if they do not have one. Furthermore, if the contact record has no phone number, and ZoomInfo does not have a direct dial number on file, they would like to insert a company phone number.

1. In the left column, select the Salesforce field for "Phone."
2. Using the middle column, select the operation "Map to ZoomInfo field."
3. In the right column, select the input value for the Original Salesforce data "Phone" field.
4. Using the button at the bottom of the window, click "Map additional field."
5. Repeat steps 1 and 2 in the new row that appears.
6. In the right column, select the input value for the ZoomInfo column "Direct Phone Number."
7. Next, using the button at the bottom of the window, click "Map additional field" again.
8. Repeat steps 1 and 2 in the new row that appears.
9. In the right column, select the input value for the ZoomInfo column "Company Phone Number."



Column Mapping (Continued)

The end result of this operation is as follows:

Pre-existing Salesforce phone numbers for Enhanced records will be overwritten with phone numbers from your original import file. This means, if you are not using a current import file, any changes you've made in Salesforce between your original import and this export will be reverted back to their original values.

If there is no pre-existing phone number for a particular contact record, and ZoomInfo has a direct dial number on file, that record will be updated with the ZoomInfo direct dial phone number.

If there is no pre-existing phone number for a particular record, and ZoomInfo does not have a direct dial phone number on file, the company phone number will be written to the phone field.

If there is no existing phone number for the record, and ZoomInfo does not have a direct dial phone number, or a company phone number, the phone number for this contact record will remain unchanged.

Processing of Exports

Exports under 4,000 records are processed on the spot. This typically takes one minute or less. Exports over 4,000 records take some time to process. You will be notified via email once processing is complete.

Troubleshooting Export Errors

In the event that your export failed, or that an error occurred, you will be notified via email. A detailed error log will be attached. Depending on the nature of what occurred, you may want to notify your Salesforce administrator to assist you in troubleshooting. You may also contact our Customer Success team at 781.693.7575, or by email at customersuccess@zoominfo.com.