ZOOMINFO FOR SALESFORCE

- Installation Guide -

This guide will help you install ZoomInfo for Salesforce within your Salesforce.com environment. You can choose to install in your Sandbox or Production environment, and you can provide access to all users, specific user profiles, or admins only. If you have any questions about this application or would like help with the installation process, please call Client Services at (781) 693-7575 or email clientservices@zoominfo.com

TABLE OF CONTENTS

PART 1: INSTALLATION AND SET-UP

STEP 1:

If you are not already logged in with your Salesforce username and password, you will be asked if you have a Salesforce username and if you are a Salesforce administrator.

If you have access to a Sandbox environment, you can choose to install ZoomInfo for Salesforce in the Sandbox or the live Production enviroment. Select the environment where you want to install the app and click Continue.

If you are not a Saleforce Administrator, please contact your company's administrator and ask them to follow these instructions to install ZoomInfor for Salesforce.

STEP 2:

On the confirm installation page, read and agree to the terms & conditions, and then click Install.

STEP 3:

If you haven't already, enter your Salesforce username and password. Again, if you are not a Salesforce Administrator, please contact your company's administrator and ask them to follow these instructions to install ZoomInfo for Salesforce.

STEP 4:

On the Package Installation Details page, Choose the Security Level appropriate for your company and click Next.

Note: We recommend that you select "Grant access to all users". If you would like to modify access at a later date, please see the FAQ at the end of the guide.
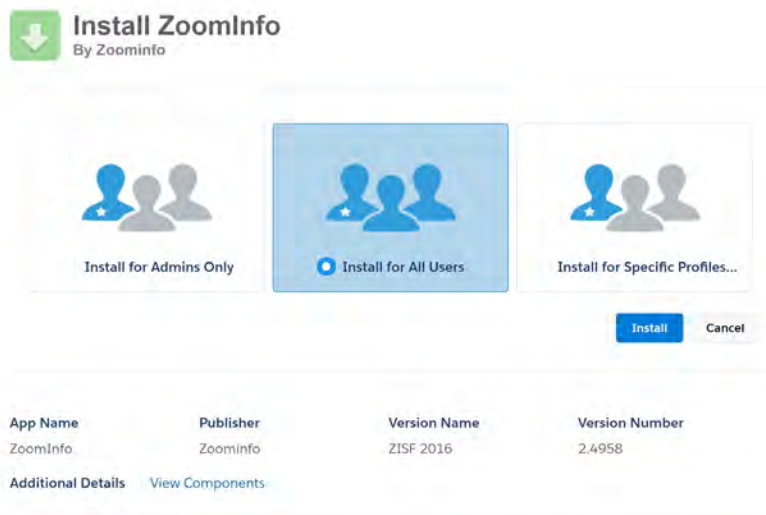
STEP 5:

On Approve Package API Access, leave all settings as they are, select the checkbox to "Yes, grant access to these third-party web sites" and click continue.
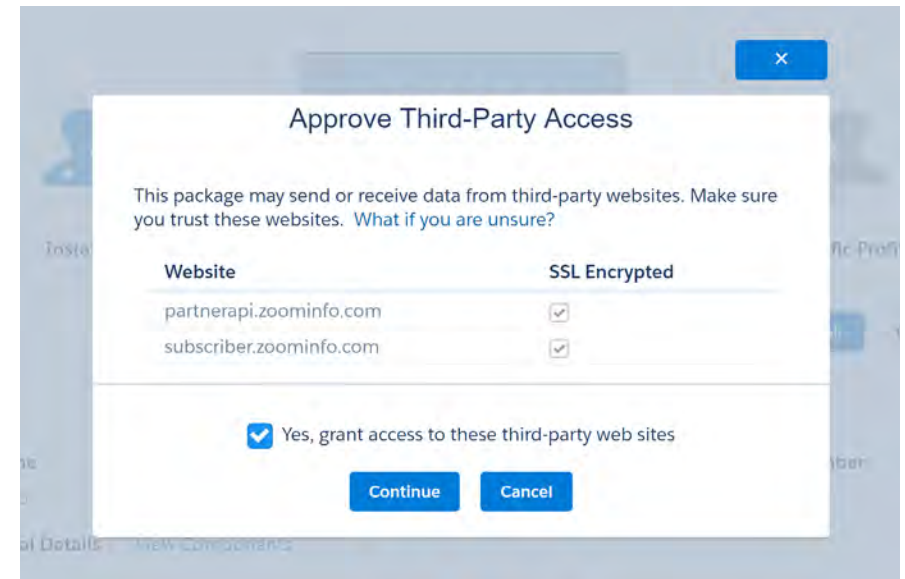
PART 2: UPLOAD THE .TXT FILE AS A STATIC RESOURCE

STEP 1:

You will have to generate a small text file to upload as a static resource.

To generate the text file, log into your ZoomInfo Pro account: www.zoominfo.com/login

STEP 2:

Click on the Account link in the top right corner, next to your name.
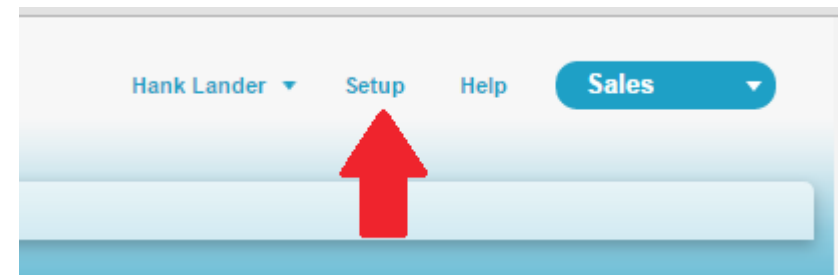
STEP 3:

Click the "Get API Key" button

STEP 4:

Once the text file has opened, save it to your desktop or someplace that you can retrieve easily.
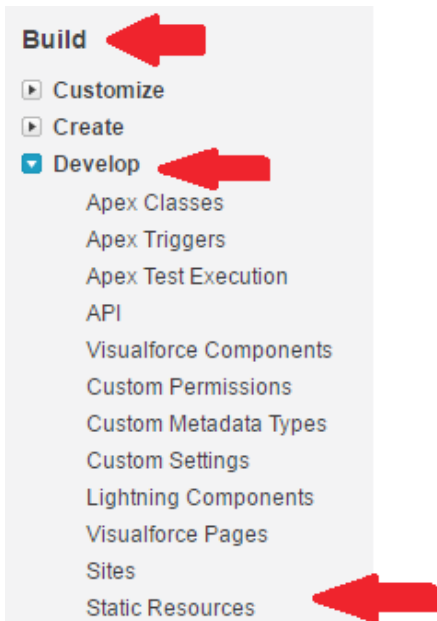
STEP 5:

Go back to Salesforce.com and click on Setup in the user menu at the top of the page.

STEP 6:

Navigate to the Build menu and click on Develop. Then click Static Resources.
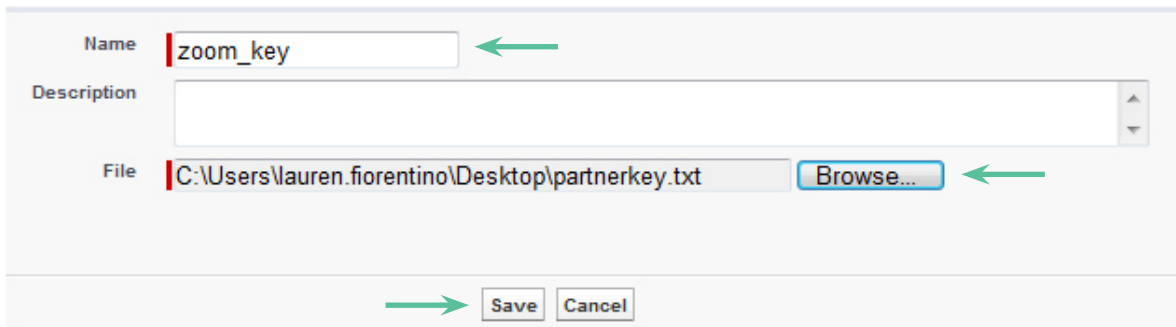

STEP 7:

Click on New

STEP 8:

In the Name field, type zoom_key and upload the .txt file (Note: the Name of this file must be zoom_key in all lowercase with an underscore between the two works.
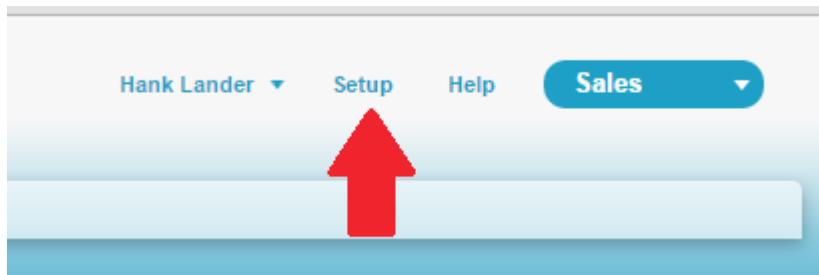
STEP 9:

Click Save

PART 3: ADD TO PAGE LAYOUTS

You must complete this process for ALL of the Account, Contact, and Lead page layouts on which you would like to see the ZoomInfo People and Company profiles.
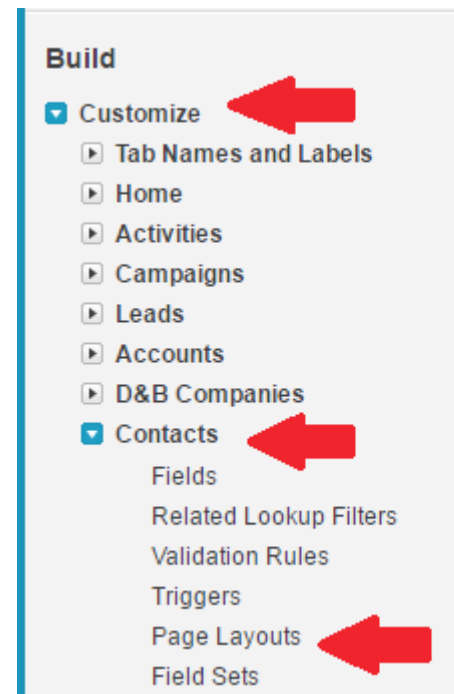
CONTACTS

STEP 10:

Click on the Setup in the user menu at the top right

Note: If you use multiple page layouts for Contacts and/or Accounts, you will need to complete this process for all of the layouts on which you want to see ZoomInfo functionality.
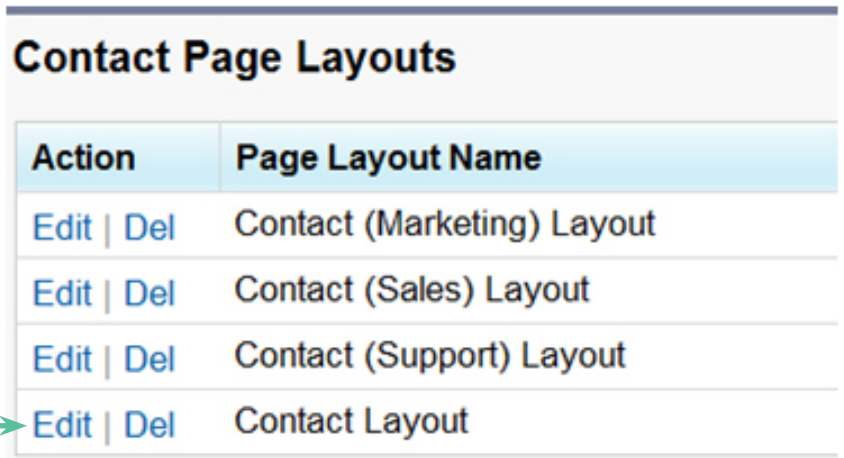
STEP 11:

Navigate to the Build menu and click on Customize. Then click on Contacts and choose Page Layouts.
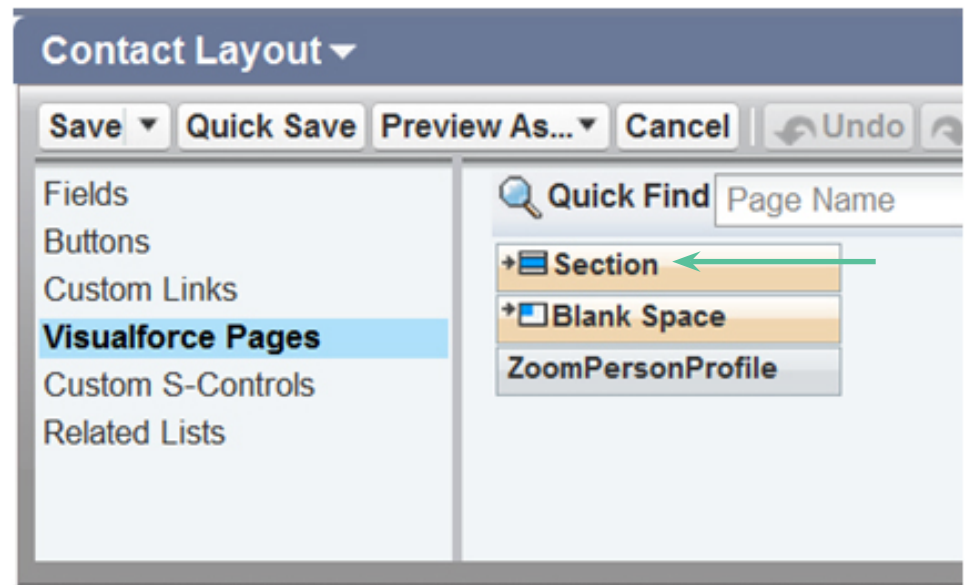
STEP 12:

Click Edit for each Page Layout Name on which you would like to add ZoomInfo for Salesforce

Contact Page Layouts

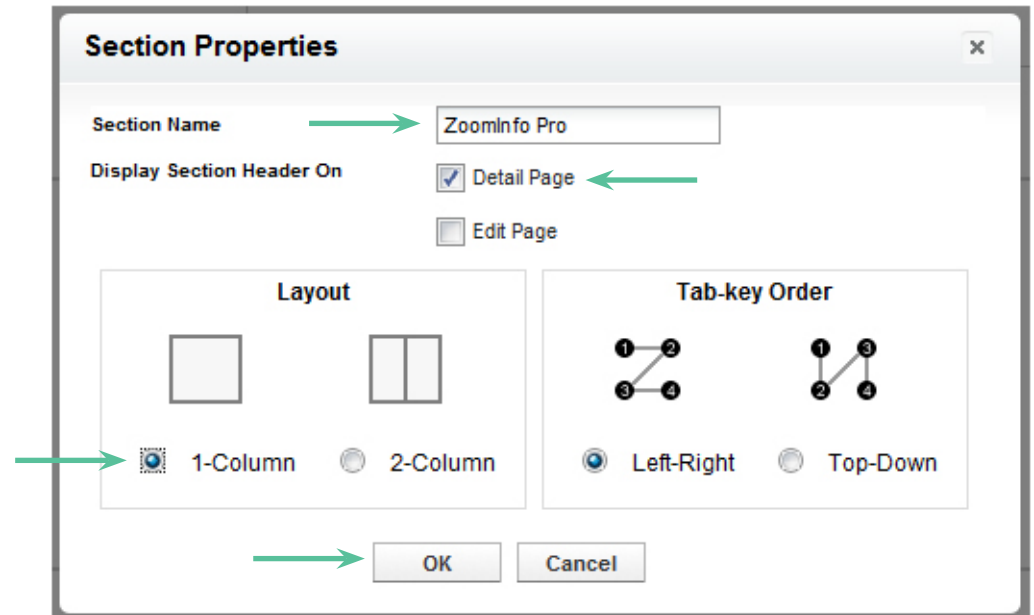| Action	Page Layout Name
Edit | Del	Contact (Marketing) Layout
Edit | Del	Contact (Sales) Layout
Edit | Del	Contact (Support) Layout
Edit | Del	Contact Layout

STEP 13:

In the Contact Layout tool, click on the Section button and drag it into place on the layout for each Contact page. While you can place this section where you like, we recommend adding it above the Opportunities section.
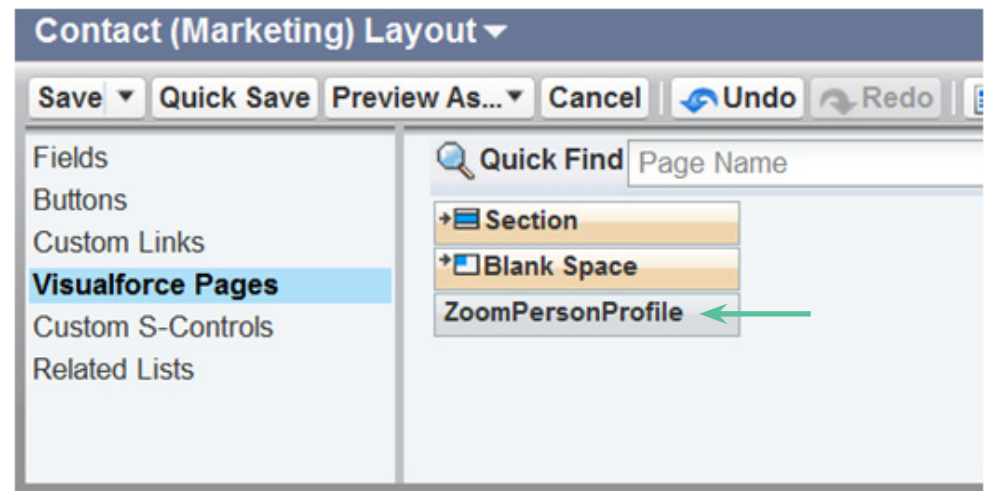
Contact Layout ▼

Save ▼ | Quick Save | Preview As... ▼ | Cancel | Undo

Fields
Buttons
Custom Links
Visualforce Pages
Custom S-Controls
Related Lists

Quick Find Page Name

Section
Blank Space
ZoomPersonProfile

STEP 14:

Enter the Section Name as ZoomInfo and select Detail Page under Display Section Header On and 1-Column for Layout. Click OK to save these properties.

Section Properties ×

Section Name → ZoomInfo Pro

Display Section Header On ☑ Detail Page ←

☐ Edit Page

Layout

→ ◉ 1-Column ○ 2-Column

Tab-key Order

◉ Left-Right ○ Top-Down

→ OK Cancel

STEP 15:

Click on Visualforce Pages. Drag the ZoomInfoPersonProfile box into the new section.

Contact (Marketing) Layout ▾

Save ▾ | Quick Save | Preview As... ▾ | Cancel | ↺ Undo | ↻ Redo

Fields
Buttons
Custom Links
Visualforce Pages
Custom S-Controls
Related Lists

🔍 **Quick Find** Page Name

▸◻ Section
▸◻ Blank Space
ZoomPersonProfile ←

STEP 16:

Double-click the blue space or on the Properties icon. Change Height to 535. Click OK to save these properties. (If you don't follow the instructions in this step, the ZoomInfo panel on your Contact page may not display properly.)
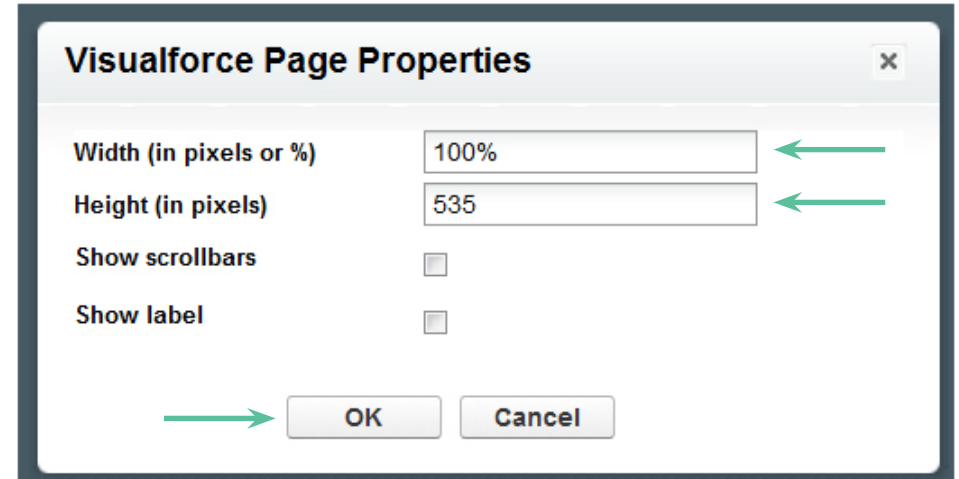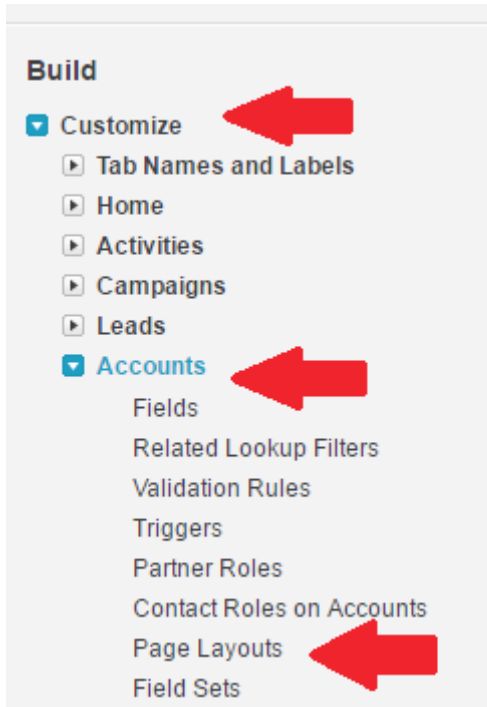

STEP 17:

Click Save

Note: remember, you will need to repeat this process for any other contact layouts on which you want to see ZoomInfo functionality.
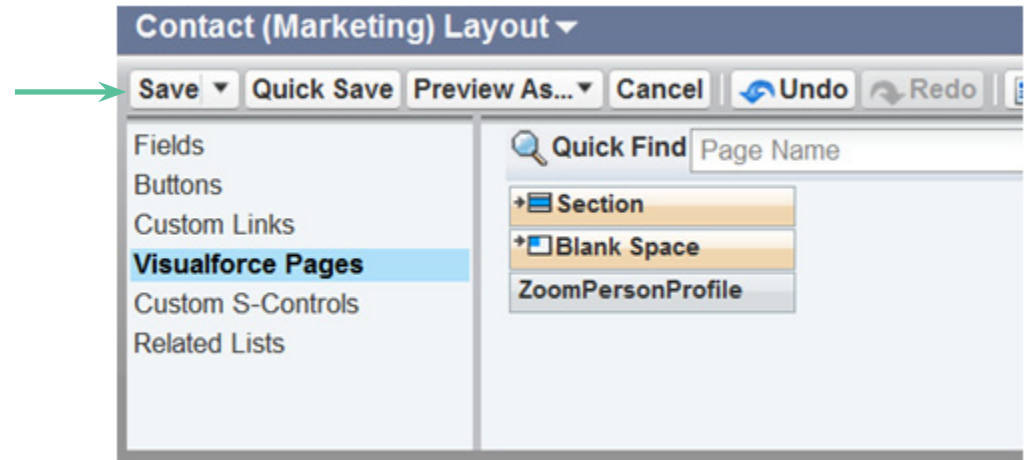
ACCOUNTS

STEP 1:

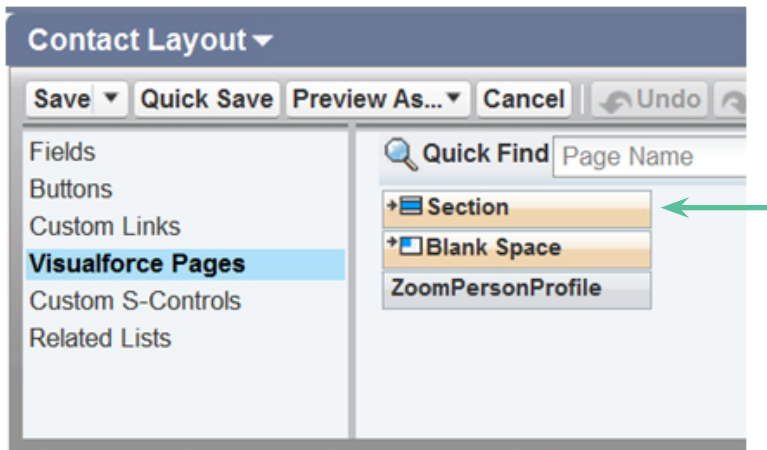Navigate to the Build menu and click Customize. Then click on Accounts and choose Page Layouts.

STEP 2:

Click Edit for the page where you like to add ZoomInfor for Salesforce

STEP 3:

Click on the Section button and drag it into place on the layout for each Account page. While you can place this section wherever you like, we recommend adding it just above Contacts.

STEP 4:

Title the section ZoomInfo and uncheck Edit Page. Check 1-Column under Layout and click OK to save these properties.
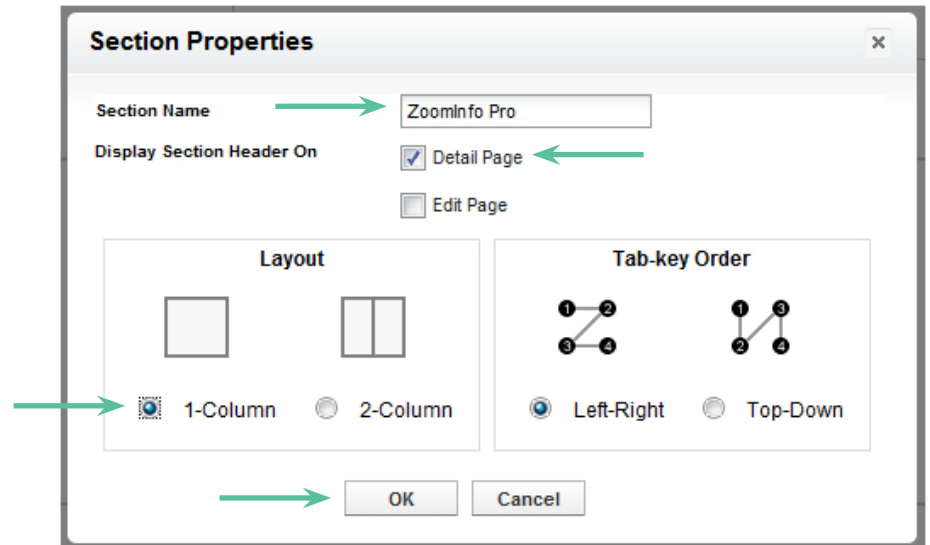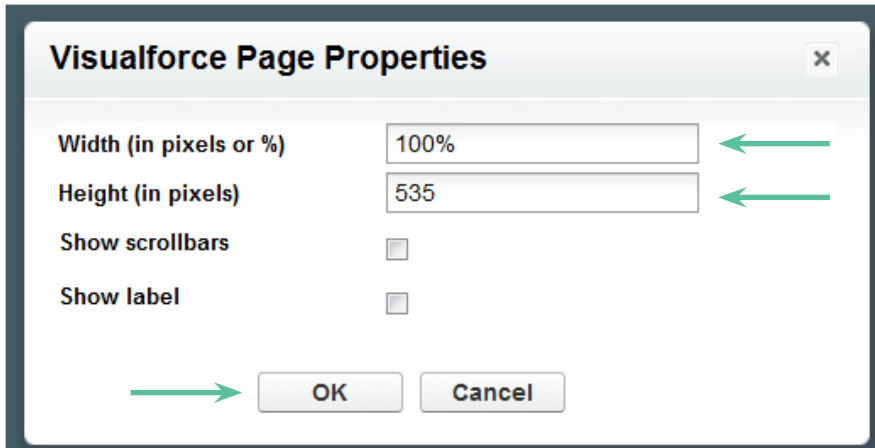

STEP 5:

Drag the ZoomInfoAccountProfile box from the VisualForce pages and place it in the new account section.
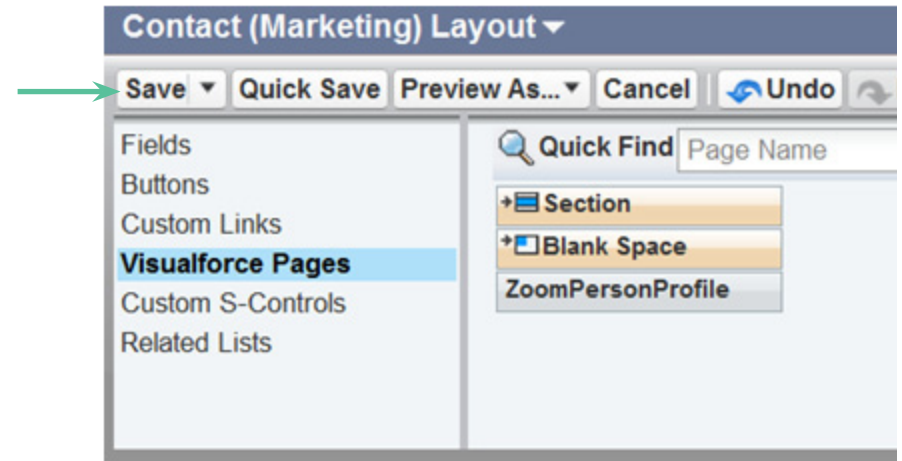
STEP 6:

Double-click the blue space or on the Properties icon. Change Height to 535. Click OK to save these properties. (If you don't follow the instructions in this step, the ZoomInfo panel on your Contact page may not display properly.)
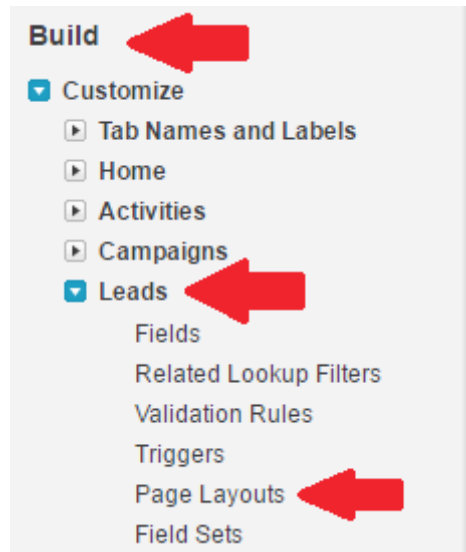

STEP 7:

Click Save

Note: remember, you will need to repeat this process for any other Account layouts on which you want to see ZoomInfo functionality.

LEADS

STEP 1:

Navigate to the Build menu and click on Customize. Then click on Leads and select Page Layouts.

Note: If you use multiple page layouts for Contacts, Accounts, and/or Leads, you will need to complete his process for all of the layouts on which you want to see ZoomInfo functionality.

STEP 2:

Click Edit for each Page Layout Name on which you would like to add ZoomInfo for Salesforce
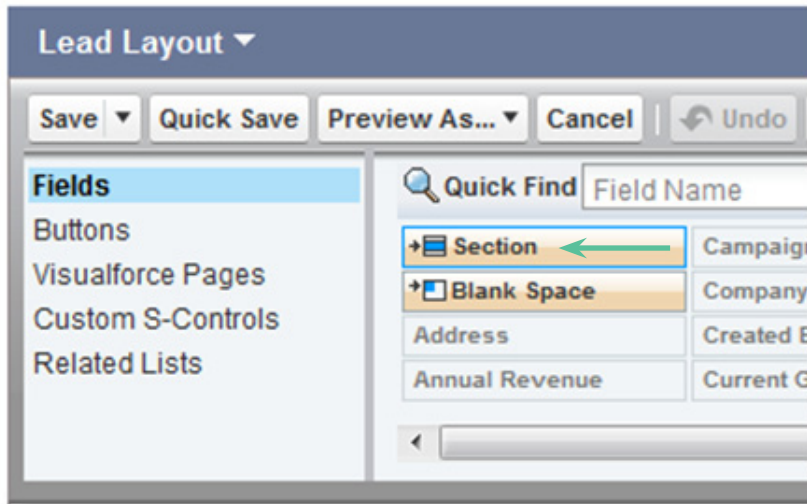
STEP 3:

In the Lead Page Layout tool, click on the Section button and drag it into place on the layout for each Lead page. Which you can place this section wherever you like, we recommend adding it above the Open Activities section.
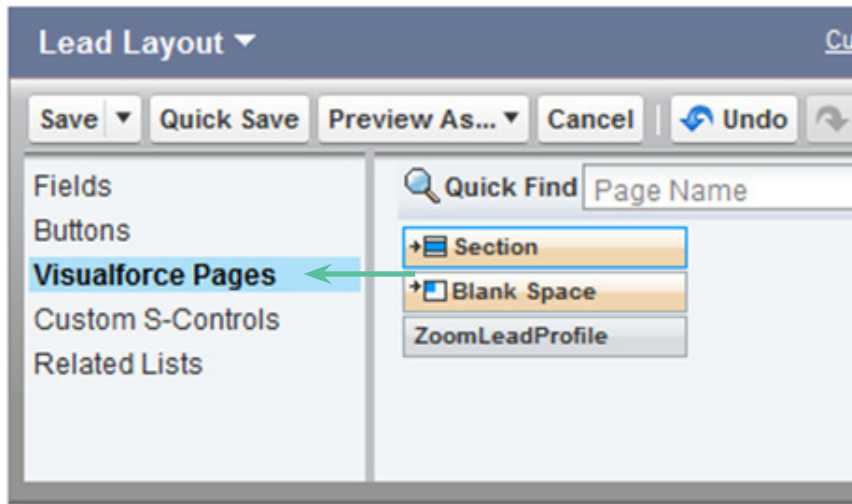
STEP 4:

Enter the Section Name as ZoomInfo and select Detail Page under Display Section Header On and 1-Column for Layout. Click OK to save these properties.
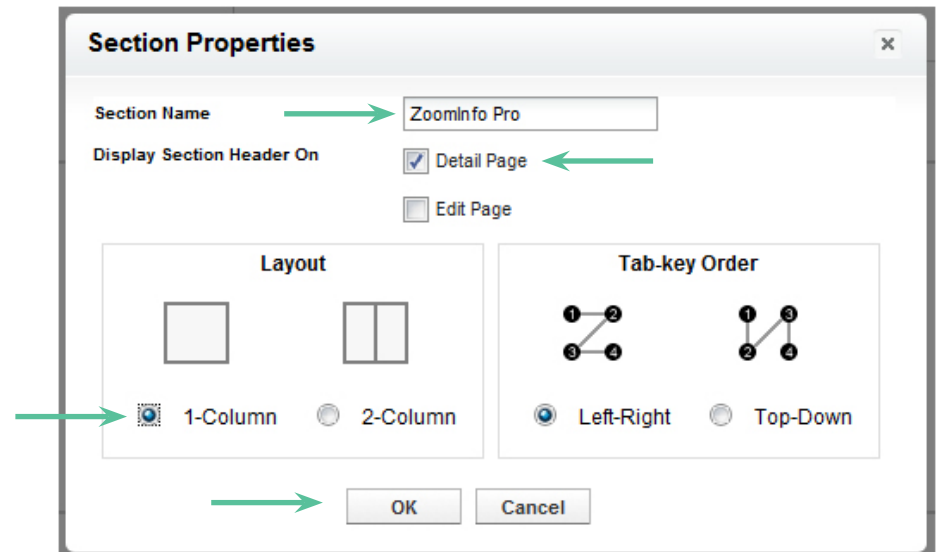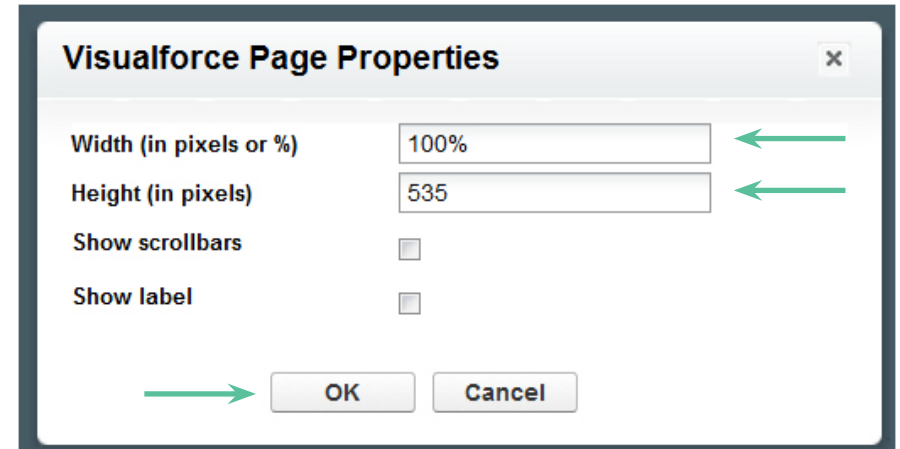
STEP 5:

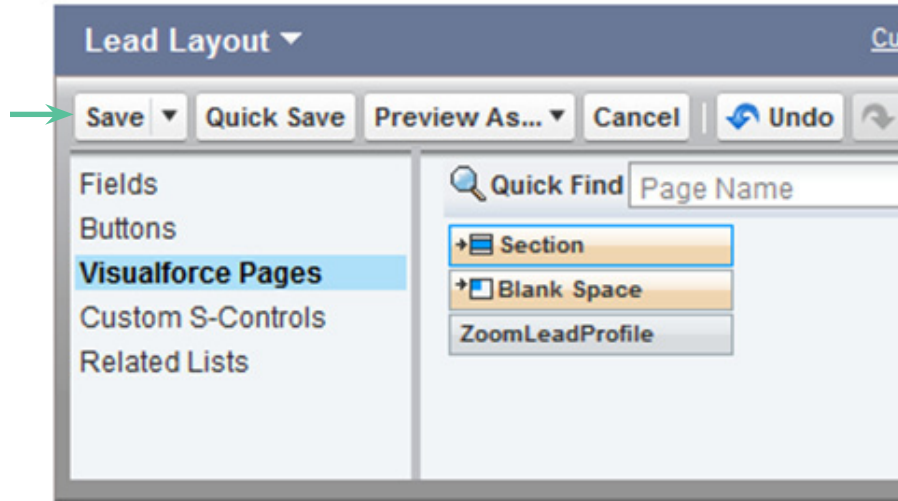Click on Visualforce Pages. Drag the ZoomInfo Lead Profile box into the new section

STEP 6:

Double-click the blue space or on the properties icon. Change Height to 535. Click OK to save these properties. (If you don't follow the instructions in this step, the ZoomInfo panel on your Contact page may not display properly.)

STEP 7:

Click Save

Note: remember, you will need to repeat this process for any other Lead layouts on which you want to see ZoomInfo functionality.

PART 4: ADD THE ZOOMINFO TAB

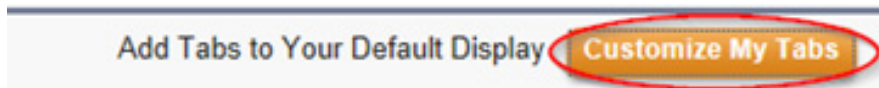This sequence will need to be completed by each user of ZoomInfo

STEP 1:

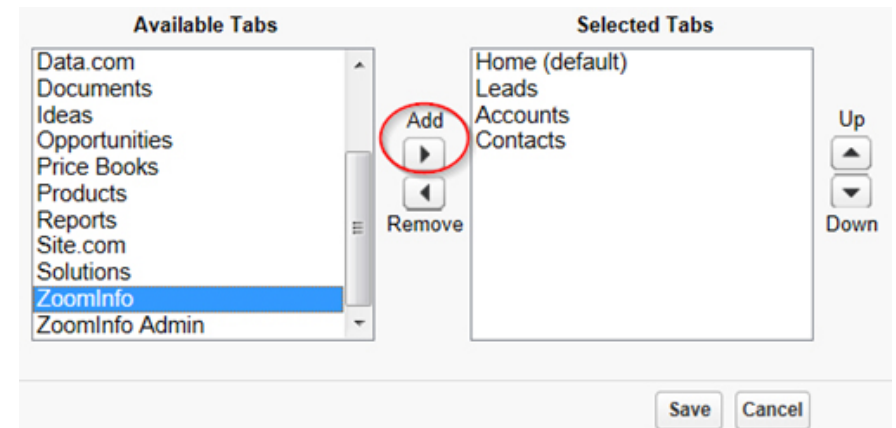Click the + Sign at the far right of your tabs

STEP 2:

Click 'Customize My Tabs' on the right side of the page

STEP 3:

Select the ZoomInfo tab from Available tabs, click 'Add', then 'Save'

Your installation of ZoomInfo for Salesforce is now complete! To verify that the functionality is active, go to an Account or a Contact and look for the ZoomInfo section. You will need to log in to a ZoomInfo Pro Account with a valid username and password.

Once you have logged in within Salesforce, you should be able to view the ZoomInfo profile matching that company name or person name in the ZoomInfo section.

Keep in mind that all Salesforce users within your company will need to log in to a ZoomInfo Pro account with a valid username and password, and ZoomInfo data cannot be imported into Salesforce unless you have purchased credits with your ZoomInfo subscription. If you need to purchase additional ZoomInfo Pro licenses or credits, please call 781-693-7500 to speak with your account representative.

# HIDING THE ZOOMINFO ADMIN TAB FROM NON-ADMIN USERS

OVERVIEW: There are two ways Salesforce Administrators can control who can see the ZoomInfo Admin tab. The first is via user profiles. The second is through permission sets. Please review the following steps prior to installation and choose the method that best fits your organization.

SET BY USER PROFILE

Complete the following steps prior to installing the ZoomInfo plugin:

1. Navigate to the Setup menu. Underneath Administration Setup, click on manage users, then select profiles from the dropdown menu
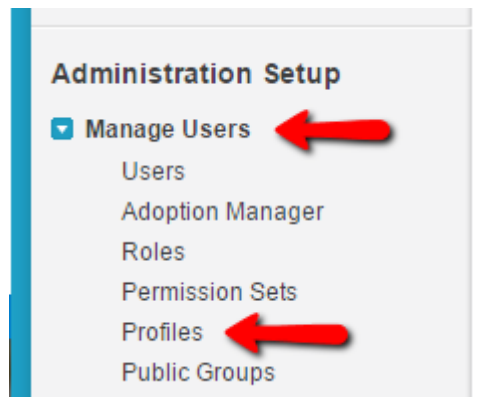
2. Select the profile for which you intend to install the ZoomInfo plugin and clone it.

3. Scroll down to the Tab Settings section, specifically the "Custom Tab Settings" portion.

4. Next, select the profile you cloned and the System administrator profile.

5. Complete the install and setup process

ONCE THE ZOOMINFO FOR SALESFORCE APPLICATION HAS BEEN SUCCESSFULLY INSTALLED:

1. Navigate to the Setup menu. Underneath Administration Setup, click on manage users, then select profiles.

2. Click "Edit" next to each profile you wish to hide the admin tab for

3. Scroll down to the Tab Settings section and find Custom Tab Settings

4. Using the dropdown menu adjacent to the ZoomInfo admin option, select "Tab Hidden," and click save.

5. Repeat these steps for all profiles you wish to hide the admin tab for.

SET BY PERMISSION

1. Create a permission set called "ZoomInfo admin tab."

2. In the permission set, select "Object Settings."

3. Click on the object called "ZoomInfo admin" and set the permission

*Please note, the ZoomInfo admin tab is a Visualforce tab, so there is no custom object called "ZoomInfo admin." However, it will show up under "Object Settings."

# HOW TO UNINSTALL ZOOMINFO FOR SALESFORCE

If you choose to uninstall ZoomInfo for Salesforce, you will need to delete the ZoomInfo section from all Contact and Account page layouts and uninstall the application from the Installed Package view.

STEP 1:

Remove created ZoomInfo sections from Contact and Account page layouts

A. Click setup in the user menu at the top right and then Build in the left-hand column. Under Build, browse to Customize > Accounts > Page Layouts
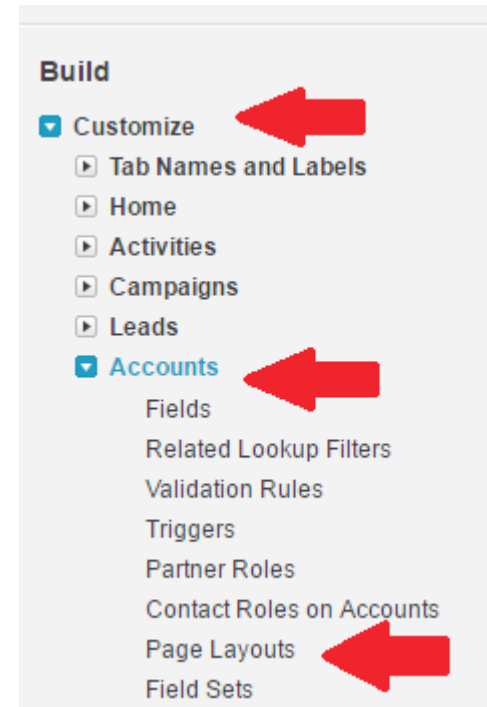
B. Click Edit for the Page Layout Name where you would like to delete the ZoomInfo section

C. Scroll down to the ZoomInfo section on that page and click the Remove Section icon. Then click Save.

D. Repeat this process for all Account, Lead, and Contact page layouts where there is a ZoomInfo section

E. Please note you will need to complete this step for ALL Contacts and Account layout where the ZoomInfo section was added.

STEP 2:

Uninstalling the ZoomInfo for Salesforce application

A. Go to Setup in the user menu at the top right, and then App Setup in the left-hand column. Under App Setup, browse to View Installed Packages and click Uninstall next to ZoomInfo for Salesforce

CONFIGURING ZOOMINFO PLUGIN CUSTOM SETTINGS

STEP 1:

Click on the ZoomInfo Admin tab. Then click "New."

STEP 2:

Where it says "Name" please enter a name for the custom setting you are about to create.

STEP 3:

In the Profile or Global ID box, you can either enter the 18-character Salesforce profile ID you wish to create these settings for, or you can type in "Global" which will create the custom setting for all Salesforce profiles.

STEP 4:

Select the customization you wish to apply by checking off the appropriate boxes. Click "Save" when you are finished. Your custom setting will now be applied.

STEP 5:

If you want to assign the custom setting you just created to more than one Salesforce Profile (but not ALL Profiles), click into the setting you just created followed by the "Clone" button. Edit the Salesforce Profile ID and click "Save." Repeat this step for each profile.

ENABLING & DISABLING "SEARCH CRITERIA PERSISTENCE" WITHIN FIND MORE CONTACTS

By default the Find More Contacts feature within the Account visual force page of the plugin will persist the search criteria from your previous search as you navigate through accounts in your Salesforce. You can always clear the search by clicking the Clear Form button as detailed in the screenshot below. Or you can simply disable this feature using the Custom Settings within the ZoomInfo admin tab.
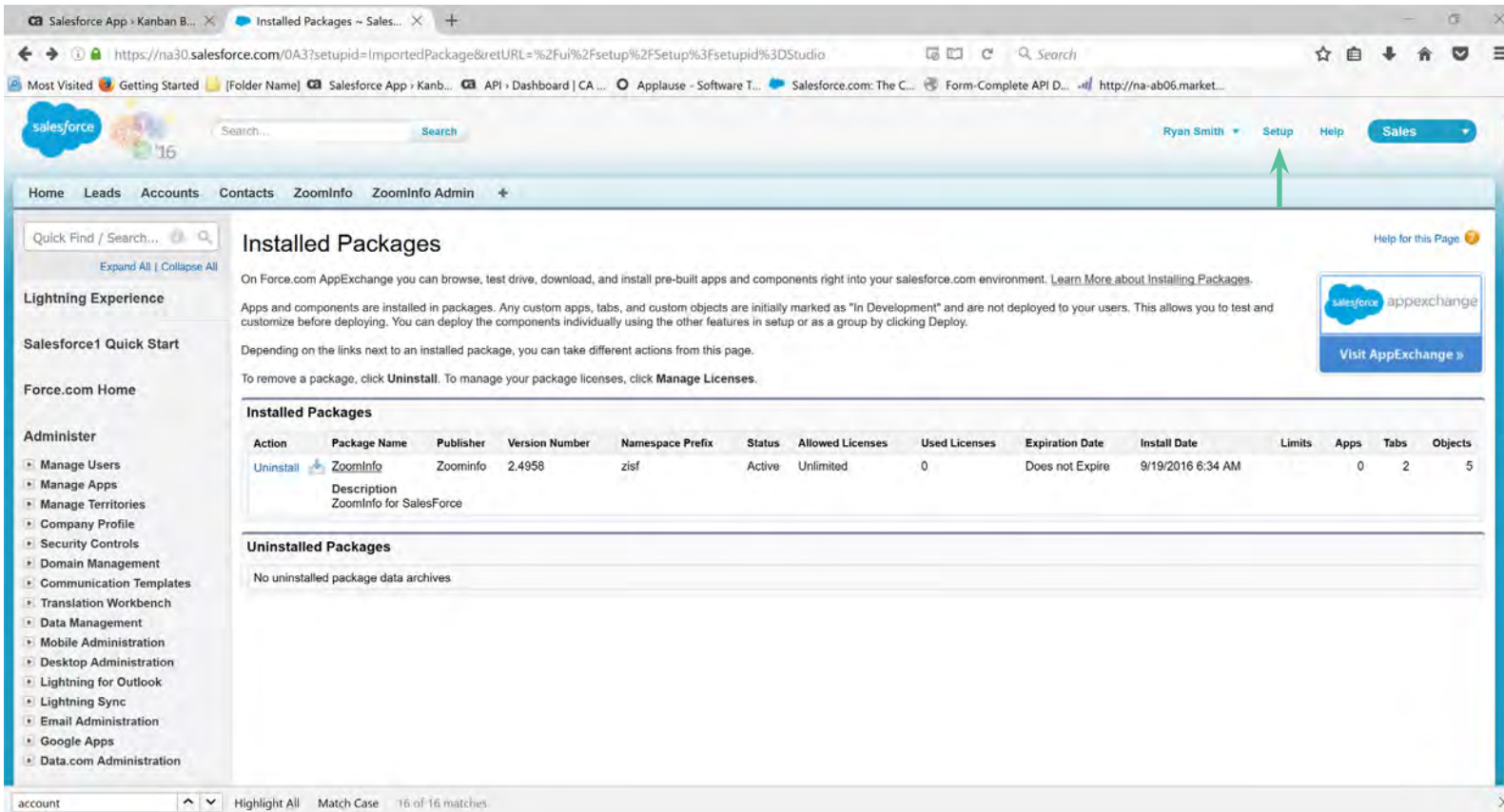
Note: If you've upgraded from an older version of the plugin, please review the following instructions to access this feature. For first time installations this feature will appear in the Custom Settings section by default.

Overview	Find More Contacts

Contact Name

Job Title

City / State / ZIP

▸ Location

▸ Job Function

▸ Management Level

Clear Form

Find People

IF YOU'VE UPGRADED FROM A LEGACY VERSION OF THE ZOOMINFO FOR SALESFORCE PLUGIN, PERSISTENCE CHECKBOX VISIBILITY WILL FIRST REQUIRE CONFIGURATION:
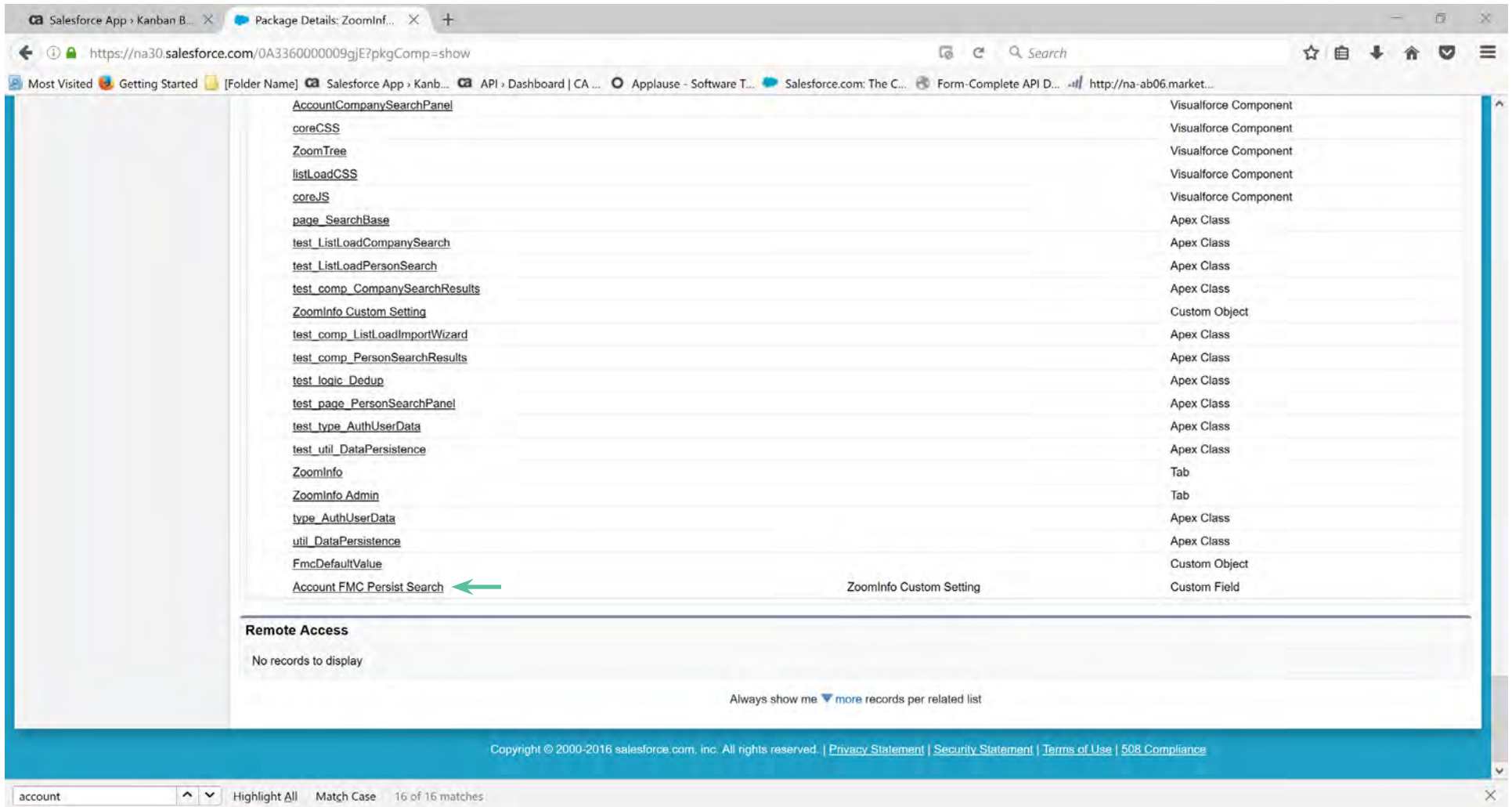
1. Click on setup
2. Click on Quick Find, type Installed Packages and select this option from the list
3. Click on the ZoomInfo Package

4. Click on view Components.

5. Click on Account FMC Persist Search

6. Click on view field accessibility

7. Click on Hidden to the Right of System Administrator

8. Toggle on both 'visible' checkboxes.
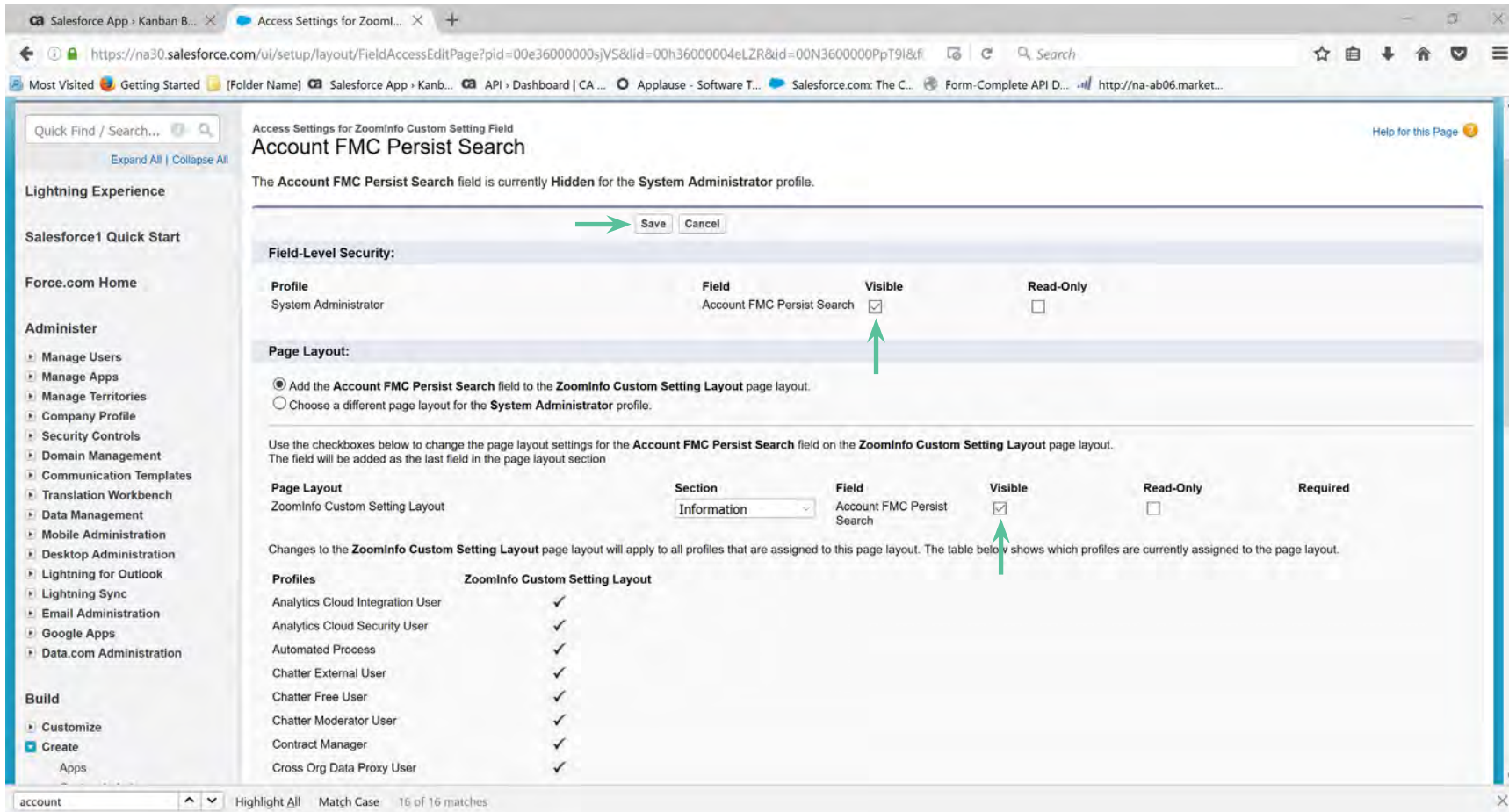
9. Click Save.

10. Navigate to the ZoomInfo Admin tab and click into the custom setting for each profile you wish to enable or disable this feature.

MAPPING DATA TO STANDARD FIELDS

The following standard fields for Leads, Accounts, and, Contacts will be updated by ZoomInfo by default when data is available:

LEAD

- First Name
- Last Name
- Title
- Company
- Phone
- Email
- Address (Street, City, State, Zip Code and Country)
- Website
- Employees
- Annual Revenue
- Industry
- Description
- Fax

ACCOUNT

- Name
- Address (Street, City, State, Zip code, and Country)
- Website
- Phone
- Employees
- Annual Revenue
- Industry
- Description
- Company Ticker
- Fax

CONTACT: (when imported from the Accounts page)

- First Name
- Last Name
- Title
- Phone
- Email
- Address (Street, City, State, Zip code, and Country)
- Fax

ZoomInfo uses custom fields and triggers to normalize industry values and append them to the standard Salesforce industry field. The ZoomInfo custom industry field allows for more than 40 characters. The Salesforce standard industry field has a limit of 40 characters, meaning if ZoomInfo's data runs longer, only the first 36 characters are copied over to the standard industry field. The full name is stored in the custom industry field supplied by ZoomInfo. For more information about mapping data to custom fields, continue reading the next section of this guide.

Please note, each object has a ZoomInfo ID and a ZoomInfo Last Updated Date/Time field. These fields help you to identify if a record was imported from ZoomInfo and can assist you in writing custom triggers.

MAPPING DATA TO CUSTOM FIELDS

The ZoomInfo for Salesforce allows full customization of how ZoomInfo data is reflected in Lead / Account / Contact records in your Salesforce Instance. To modify this mapping use the following step by step instructions.

1. Start by selecting the standard or custom Salesforce field 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.

   • **Map to ZoomInfo Column** enables you to select a ZoomInfo data point
   • **Do not import** will ensure that this data will not be reflected in your salesforce record
   • **Provide Value** enables you to input a text value, integer, or select from a pre-defined picklist for said field.

3. In the right column, select the ZoomInfo column, or a specific input value you wish to map to your salesforce.

4. Once the mapping has been configured to your liking, click Save.

Notes:

- You can always revert to the 'out of the box' default configuration by clicking on the "Use Default Configuration" followed by the save button.

- ZoomInfo provides additional person & company data points which although not visible in the Lead / Account / Contact visual force component, can be written to your Salesforce records by mapping the appropriate columns and using the "Update All" button when viewing a record.

FREQUENTLY ASKED QUESTIONS

Q:

What if I didn't grant access to all users at the beginning of the installation?

A:

If you have Enterprise, Unlimited, or Developer editions of Salesforce.com, you will add Visualforce pages to the specific profiles you would like to be able to access the application.

STEP 1:

Go to Setup > Administration Setup > Manage Users > Profiles. Click on the name of the profile you wish to add access to. Click on the "Visualforce pages" link. Click Edit.

Login IP Ranges [0] | Enabled Apex Class Access [1] | Enabled Visualforce Page Access [4]

Edit   Clone   View Users

STEP 2:

Add every Visualforce Page that is related to ZoomInfo to the Enabled Visualforce Page box. Click Save. You must complete this process for every profile you would like to add access to.

Available Visualforce Pages		Enabled Visualforce Pages
zisf.Login		--None--
zisf.ZoomAccountProfile		
zisf.ZoomPersonProfile		
zisf.ZoomLeadProfile	Add ▶	
	◀ Remove	

Q.

What does "Content cannot be displayed: A value must be provided for pc. Please Provide your partner code." mean?

A.

The Static resource may not have been uploaded or may be incorrect. Please see Part 2 of this guide for further instruction.

Q.

How do I enable or disable access to ZoomInfo for Salesforce at the Profile level after it has been installed?

A.

Click on your name at the top right > Setup > Administration Setup > Manage Users > Profiles > Click Edit on the desired profile.

TO ENABLE:

Go to Custom App Settings > Select the Visible checkbox for ZoomInfo > Go to Tab Settings > Set ZoomInfo Custom Tab settings to either Default On or Default Off > Click Save
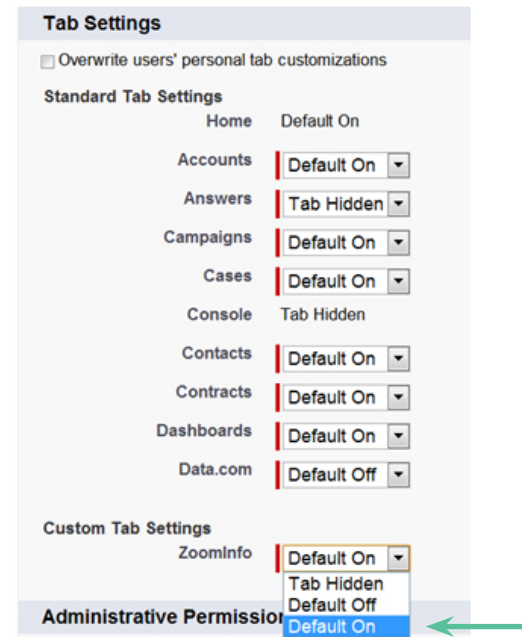
TO DISABLE:

Go to Custom App Settings > Select Visible checkbox for ZoomInfo > Go to Tab Settings > Set ZoomInfo Custom tab Settings to Tab Hidden > Click Save
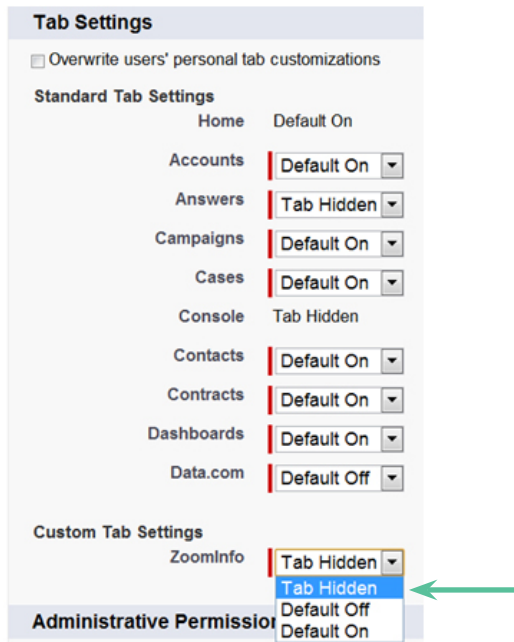
Q.

What browser should I be using?

A.

ZoomInfo recommends using the most current version of Google Chrome, Mozilla Firefox, and Internet Explorer. For a list of browsers supported by Salesforce please see *https://na1. salesforce.com/help/doc/en/faq_getstart_what_browsers_does.htm.* ZoomInfo is not compatible with Internet Explorer 7.0

Q.

What does "Authentication failed: you must log in with a ZoomInfo Username connected with your organization's subscription." mean?

A.

The ZoomInfo username isn't associated with the same account for which the API key was installed in Part 3 of this Guide. Please contact Client services for assistance at clientservices@zoominfo.com or 781.693.7575.

Q.

Does ZoomInfo use unique fields I can use to identify records imported or updated from the ZoomInfo database?

A.

ZoomInfo updates the following fields when importing or updating:

LEADS

ZoomInfo ID - a unique ID# (e.g. 457877)

ZoomInfo Last Updated - a date (e.g. 12/01/2015)

Lead Source - is updated with 'ZoomInfo'

ACCOUNTS

ZoomInfo ID

ZoomInfo Last Updated

CONTACTS

ZoomInfo ID

ZoomInfo Last Updated

Q.

Does ZoomInfo map to custom fields?

A.

Zoominfo only updates standard fields.

Q.

What criteria is used to determine whether a record to be imported is a duplicate?

A.

Deduplication Criteria: Leads & Contacts

- zoom_id matches: Exact Match
- Name + Email: Potential Match
- Name + Phone: Potential Match
- Name + First 5 Characters of Company Name: Potential Match

Deduplication Criteria: Accounts

- zoom_id matches: Exact Match
- First 5 Characters of Company Name + Website: Potential Match
- First 5 Characters of Company Name + Area Code: Potential Match
- First 5 Characters of Company Name + Zip Code: Potential Match

Q.

Implementing Advanced Plugin Customization using Salesforce Triggers

A.

Salesforce enables the use of custom triggers on the Lead, Account, and Contact objects. You will require administrative access to implement these triggers and ZoomInfo suggests working with Salesforce support to ensure proper implementation.

To create a new trigger

1. Navigate to the Setup page and click on "Customize"
2. Select Leads, Accounts, or Contacts followed by the "triggers" link
3. Select "New"
4. Copy & paste the content of the .TXT file below and modify to fit your organizational needs.
5. Save your newly created trigger

To create a new Test Class in support of your newly created trigger

1. Navigate to the Setup Page and click on "Build"
2. Click on "Develop"
3. Click on "Apex Classes"
4. Click on "Create New"
5. Copy & paste the content of the .TXT file below, modify as needed to fit your organizational needs.
6. Save your newly created Test Class
7. Click on "Run Test" at the top of the page and analyze the results to ensure the trigger has been implemented properly.

Available Triggers & Test Classes

Converting ZoomInfo Industries

- ZoomInfo Industry Mapping Account Trigger
- ZoomInfo Industry Mapping Lead Trigger
- ZoomInfo Industry Mapping Test Class

Converting State Names to Two Letter Abbreviations

- State Two Letter Code Account Trigger
- State Two Letter Code Lead Trigger
- State Two Letter Code Contact Trigger
- State Two Letter Code Test Class

zoominfo.com