

ZoomInfo Native App for Microsoft Dynamics 365 Implementation Guide

For administrators setting up the ZoomInfo Native Application for Microsoft Dynamics 365

Installing the Native App for Microsoft Dynamics 365	3
Required Permissions	3
Install the App	3
Configuring and Customizing the App Experience	6
Explore the Out-of-the-Box Experience	6
Open the ZoomInfo for Dynamics App	6
Explore the App	7
Enable the Out-of-the-Box Experience for End Users	10
Customize Your ZoomInfo Experience	13
Customize the Sales Hub	14
Customize the Form Component Using the Form Designer	14
Add the ZoomInfo Group to an App	20
Add a Web Resource for the ZoomInfo App	20
Add a Link to the ZoomInfo Knowledge Center	25
Export Preferences	26
Custom Mapping	27
Add or Remove Fields	28
Set a Hierarchy for ZoomInfo Data Within a Single Dynamics Field	28

Test and Save	28
Duplicate Checking	29
Admin Control of Duplication Settings	29
User Options During Export	29
Duplicate Logic	29
Data Sharing	31

The ZoomInfo Native App for Microsoft Dynamics 365 helps demand generation specialists, marketing and sales operations professionals, and sales leaders reach leads faster with the most accurate contact information within their preferred Dynamics workflow.

With the native app, 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

Installing the Native App for Microsoft Dynamics 365

Establish the required permissions for both admins and users and install the app.

Required Permissions

To install the native app in your Dynamics 365 environment, a Dynamics admin needs one of the following permissions:

- System administrator
- System customizer
- Global administrator

App users need the following permissions:

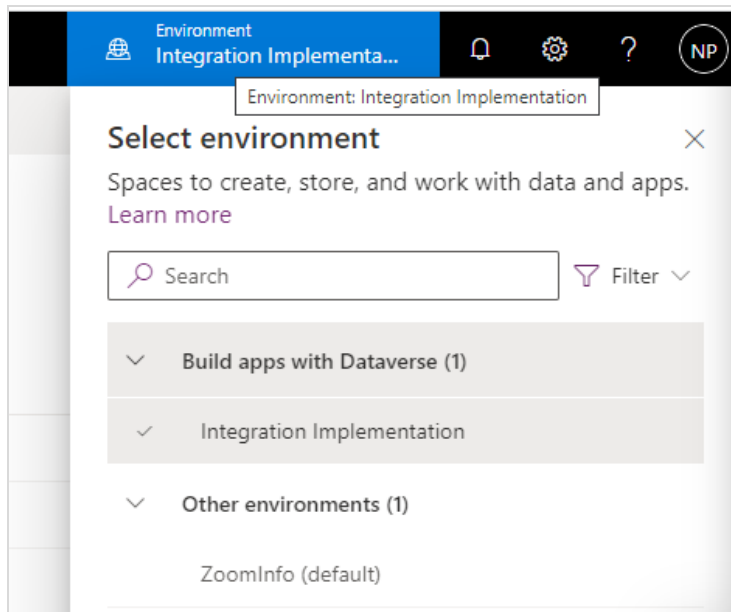
- **Account:** read, write permission (part of the security role "Sales Person")
- **Contact:** read, write permission (part of the security role "Sales Person")
- **Lead:** read, write permission (part of the security role "Sales Person")
- **Environment Variable Definition:** read permission (Basic User)

Install the App

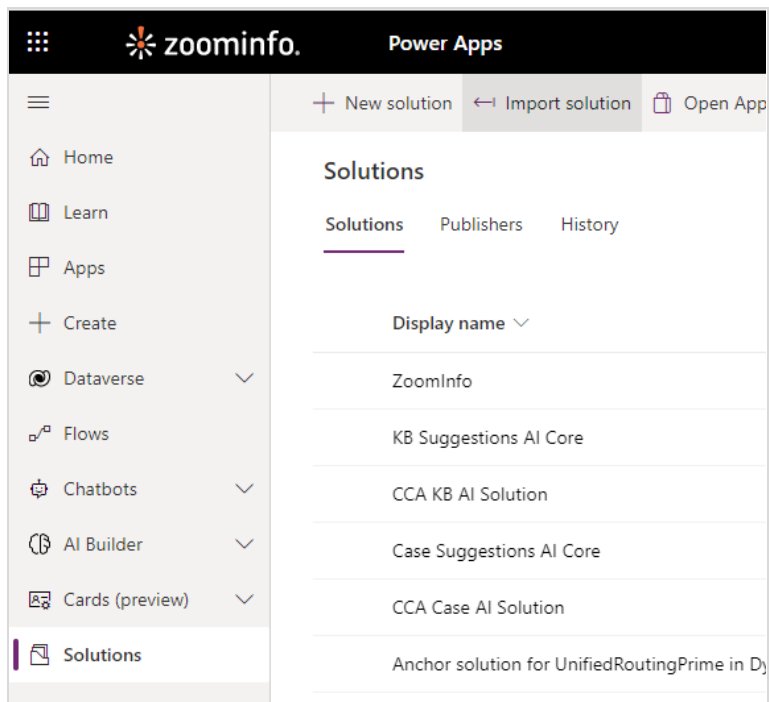
To install the ZoomInfo for native app:

1. Go to the Microsoft AppSource portal (appsource.microsoft.com) and search for "ZoomInfo".
2. Click the ZoomInfo app in the results and select **Contact Me**.
3. Sign in with the email address of the account you want to use when acquiring apps on AppSource.
4. ZoomInfo will contact you to discuss the next steps and provide you with a Solution package for installation.

- Once you've obtained the package, navigate to the Power Apps portal (make.powerapps.com).
- Select the environment into which you want to install the app.

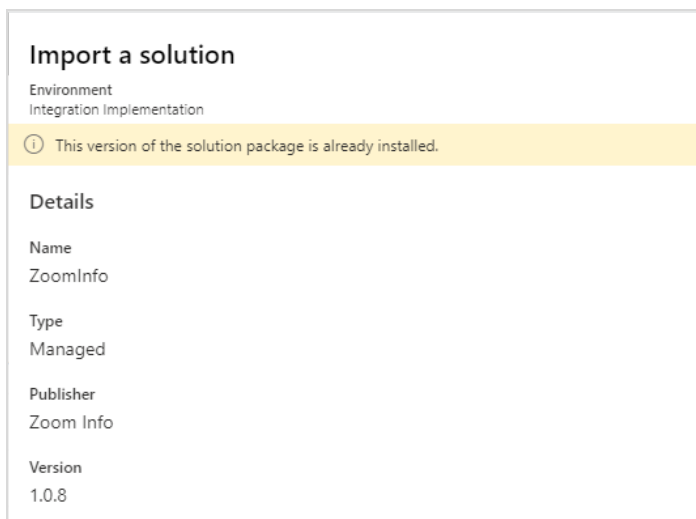


- Click **Solutions** in the left navigation.
- Click **Import solution** and browse for the downloaded solution package.

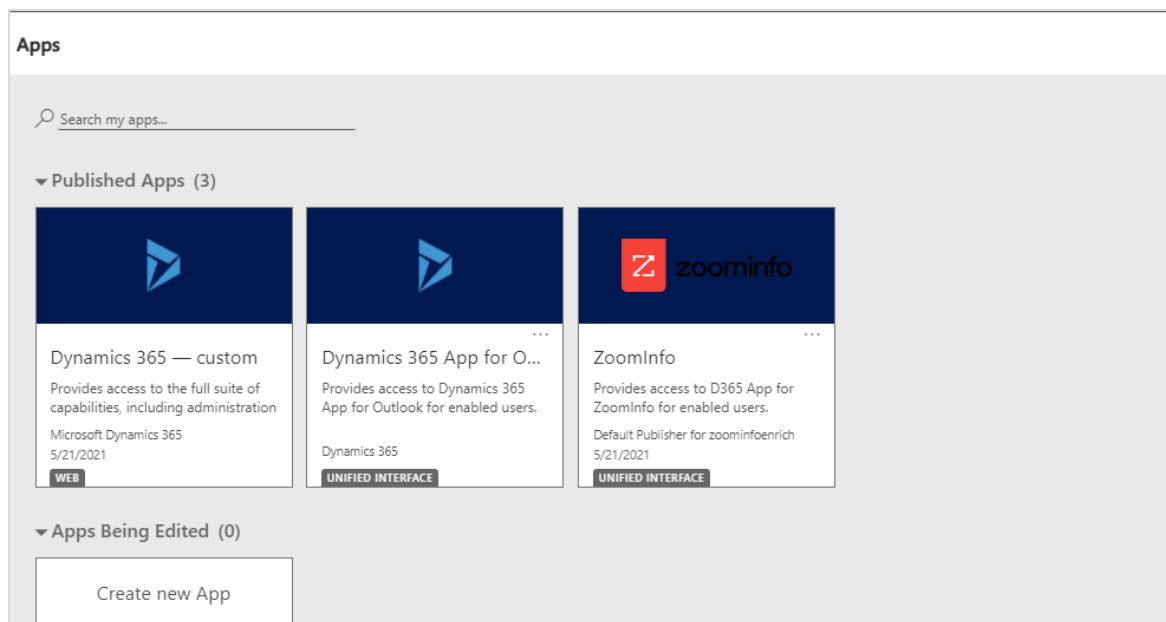


- Select the package and click **Next**.

10. Review the details of the solution package and click **Import**. Installation can take up to 15 minutes.



Once the installation is complete, the ZoomInfo app will be listed in the **Apps** portal.



Note: You can alternatively import the solution into your Dynamics environment through the Advanced Settings.

Configuring and Customizing the App Experience

You can configure the out-of-the-box experience for the ZoomInfo Native App for Microsoft Dynamics 365 as well as add native app elements that your users can leverage in their existing Dynamics app experience.

Out-of-the-box experience: The native app includes custom forms with the ZoomInfo iframe built into Account, Contact, and Lead forms. Also included in the left navigation are links to the full ZoomInfo application and Knowledge Center. See [Explore the Out-of-the-Box Experience](#) for details.

Customized experience: An admin can also choose to customize their existing environment, adding the same elements available in the out-of-the-box experience to their current Dynamics app and to standard or custom Account, Contact, and Lead objects. See [Customize Your ZoomInfo Experience](#) for details.

Explore the Out-of-the-Box Experience

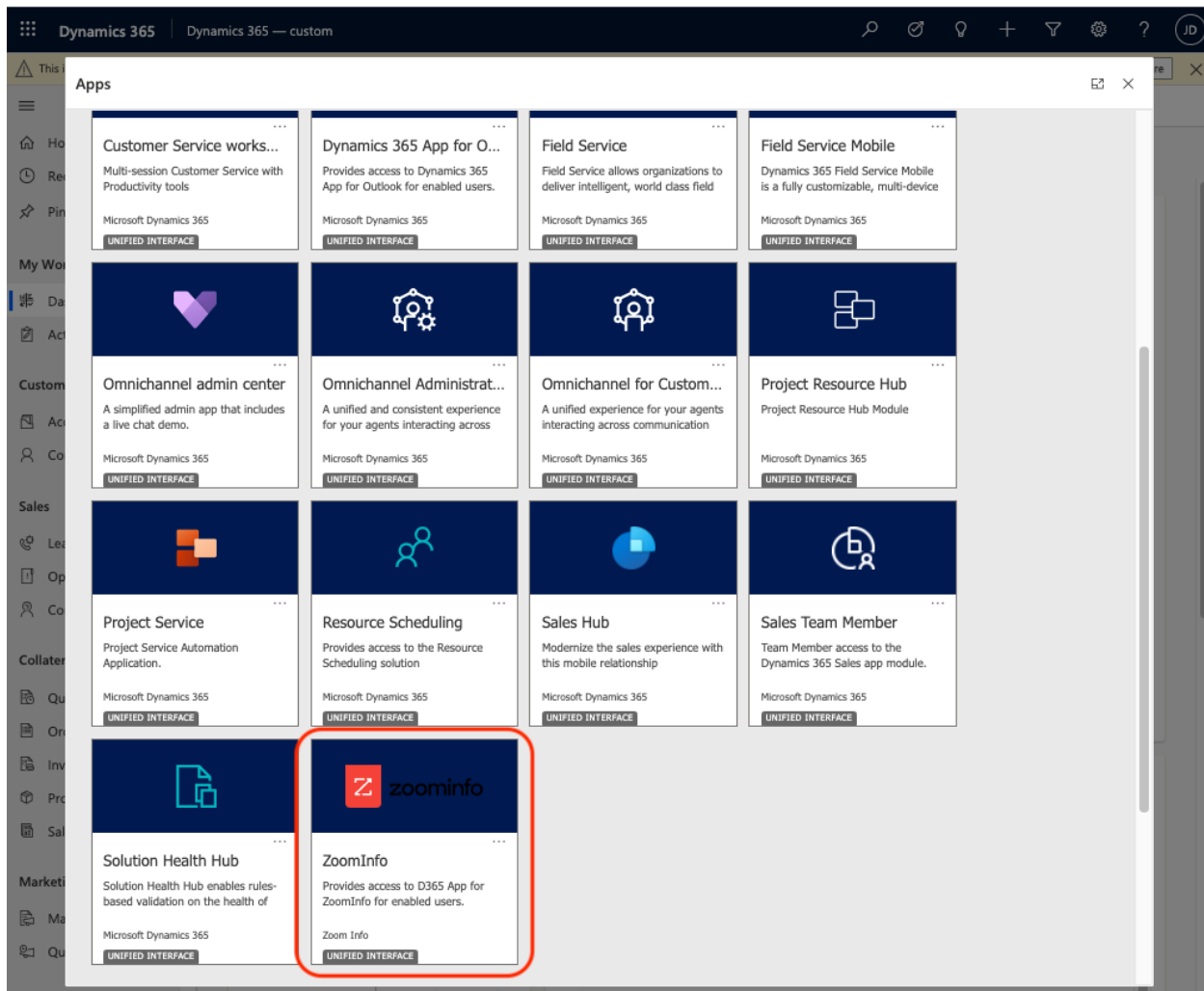
By installing the ZoomInfo for native app, admins have access to ZoomInfo data for records they've enriched with ZoomInfo data.

Admins also enable the out-of-the-box experience for their organization's end users by assigning a security role to each end user. See [Enable the Out-of-the-Box Experience for End Users](#) for details.

Review the topics in this section to explore the out-of-the-box experience for admins and end users.

Open the ZoomInfo for Dynamics App

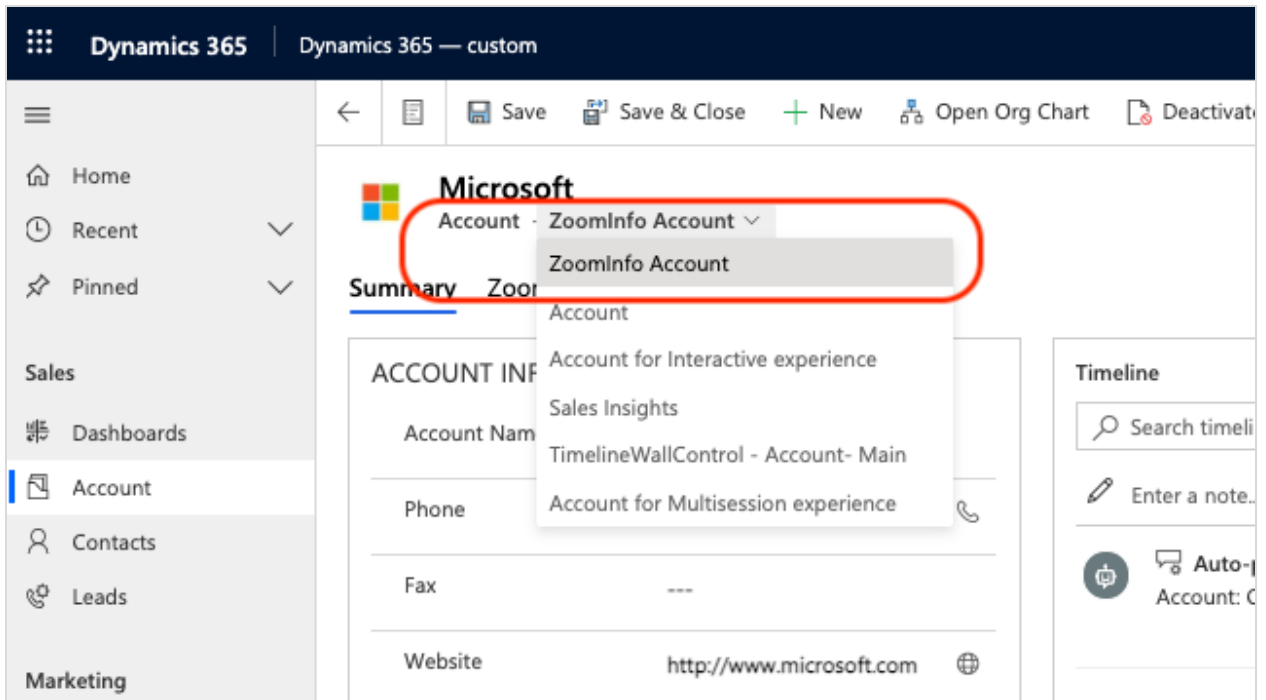
From Dynamics 365, navigate to the **Apps** page and click the **ZoomInfo** tile.



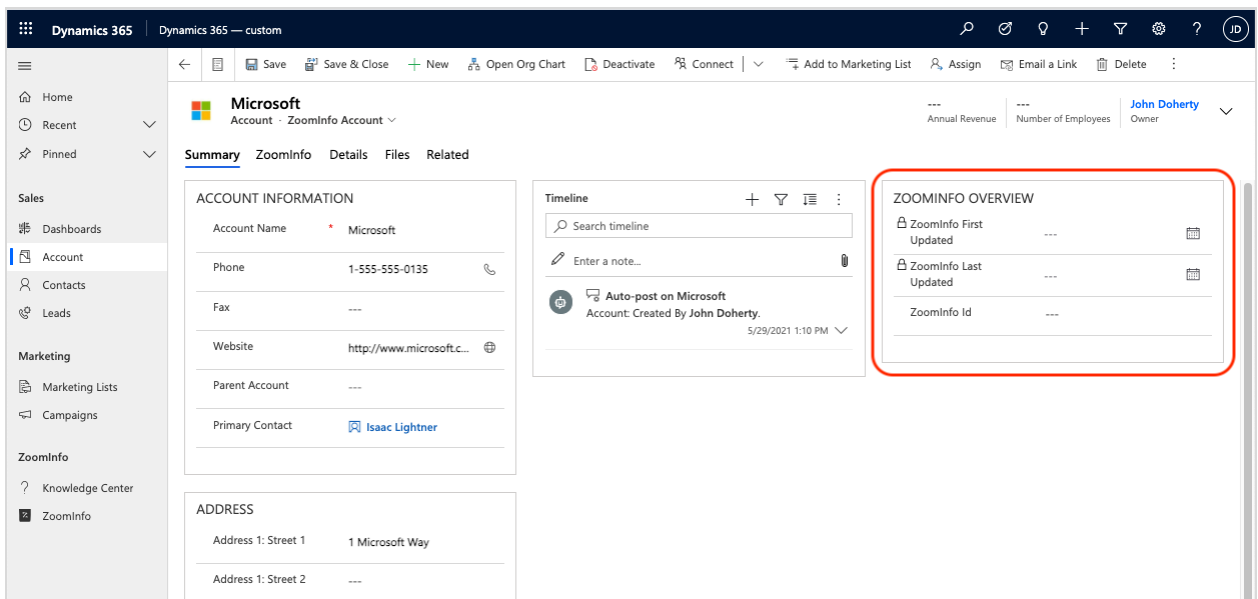
Explore the App

The native app is a custom Dynamics app with additional ZoomInfo features built-in.

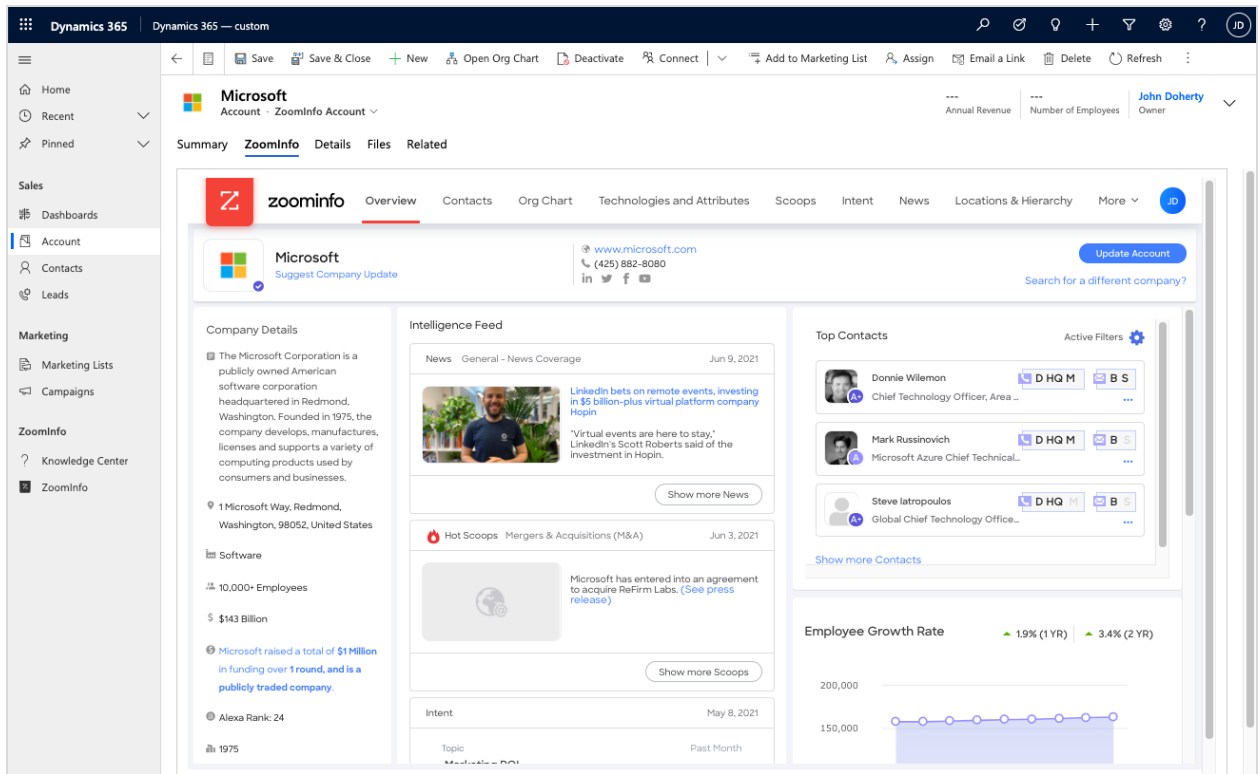
1. In the left navigation pane, select **Account**. The default **Account** page displays.
2. Select the **ZoomInfo Account** page from the dropdown.



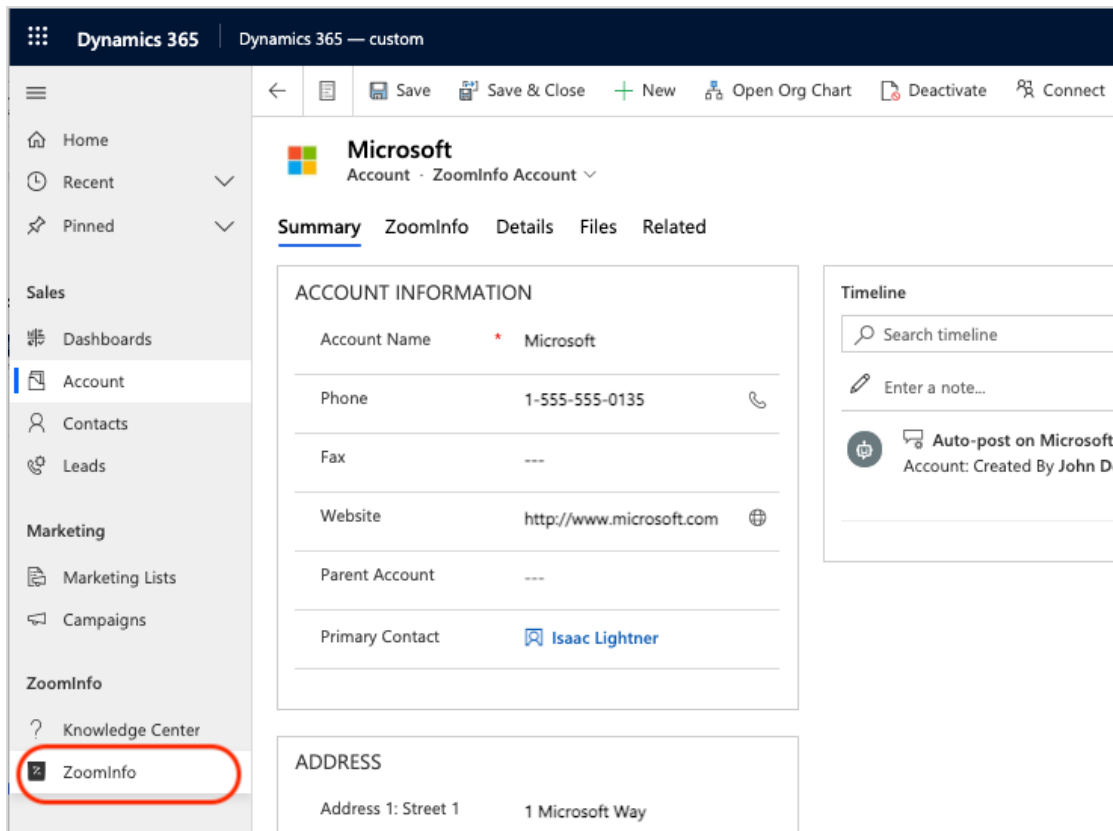
The **Summary** tab of the **ZoomInfo Account** page includes a **ZoomInfo Overview** section that includes some metadata describing the ZoomInfo data for this company, including when the Account was first updated and last updated with ZoomInfo data as well as a unique **ZoomInfo ID**.



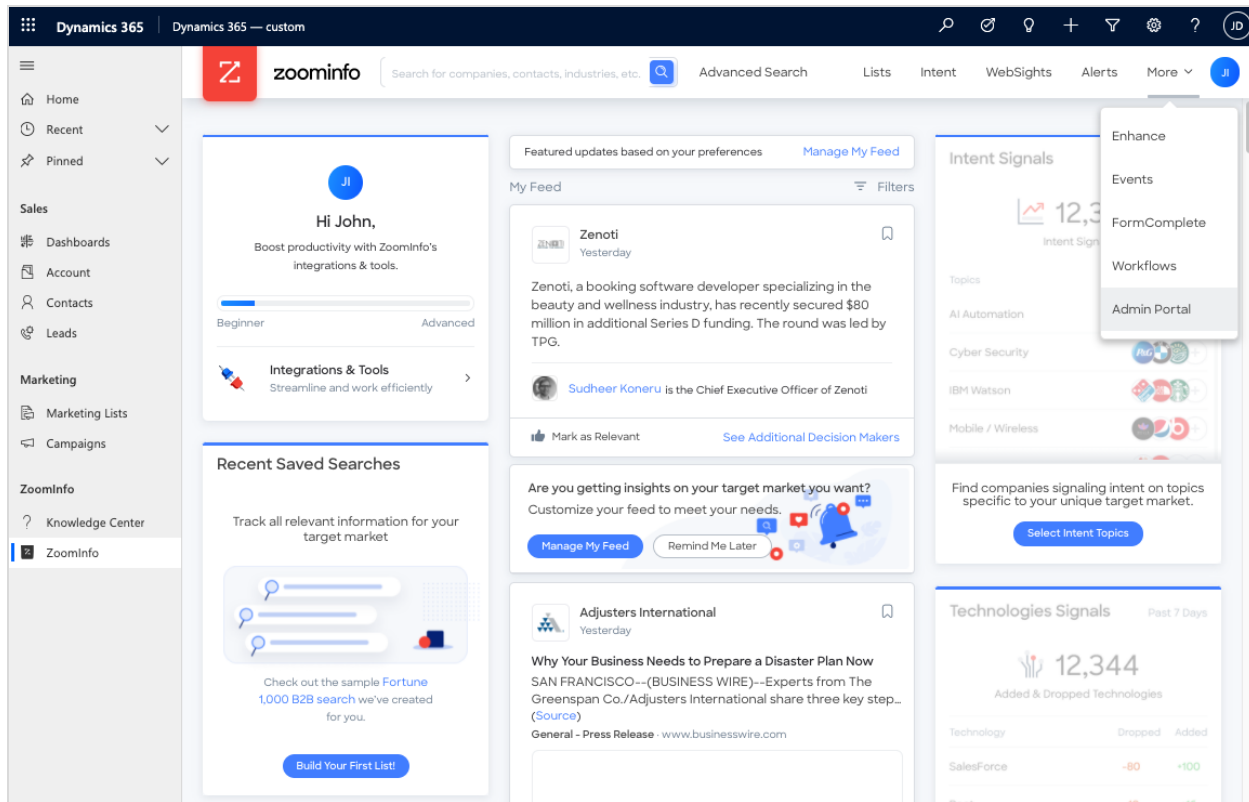
3. Click the **ZoomInfo** tab to see ZoomInfo data related to this Account.



- Click **ZoomInfo** in the left navigation to access the full ZoomInfo app.



Admins can configure export and mapping settings, and users can search for and export ZoomInfo data to Dynamics.



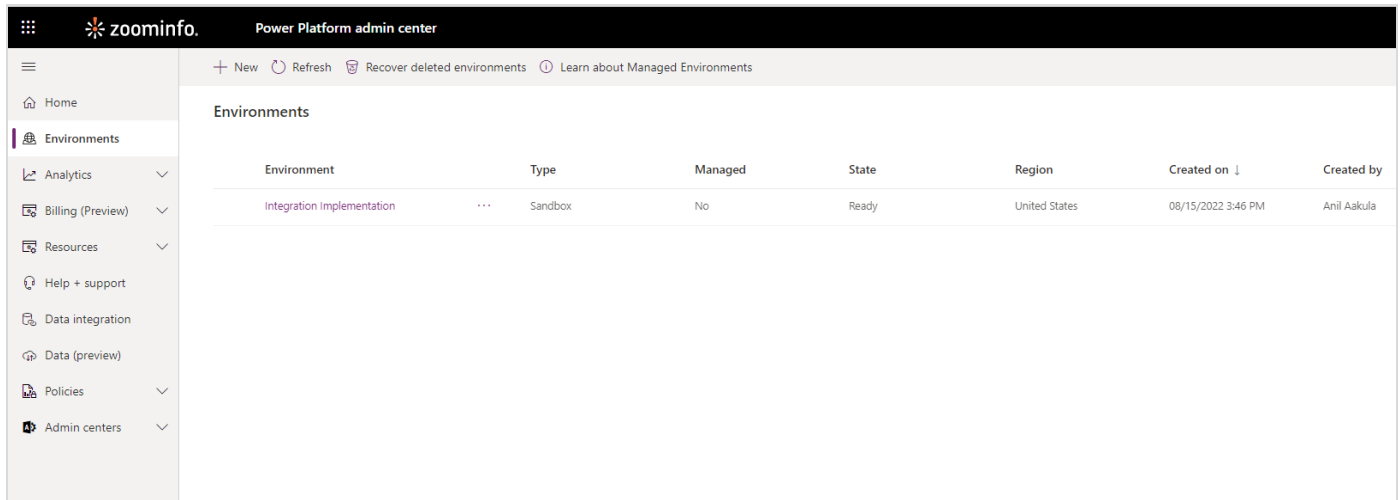
Finally, you can click Knowledge Center to access the [ZoomInfo Knowledge Center](#) where you can find knowledge articles and videos for ZoomInfo software.

Enable the Out-of-the-Box Experience for End Users

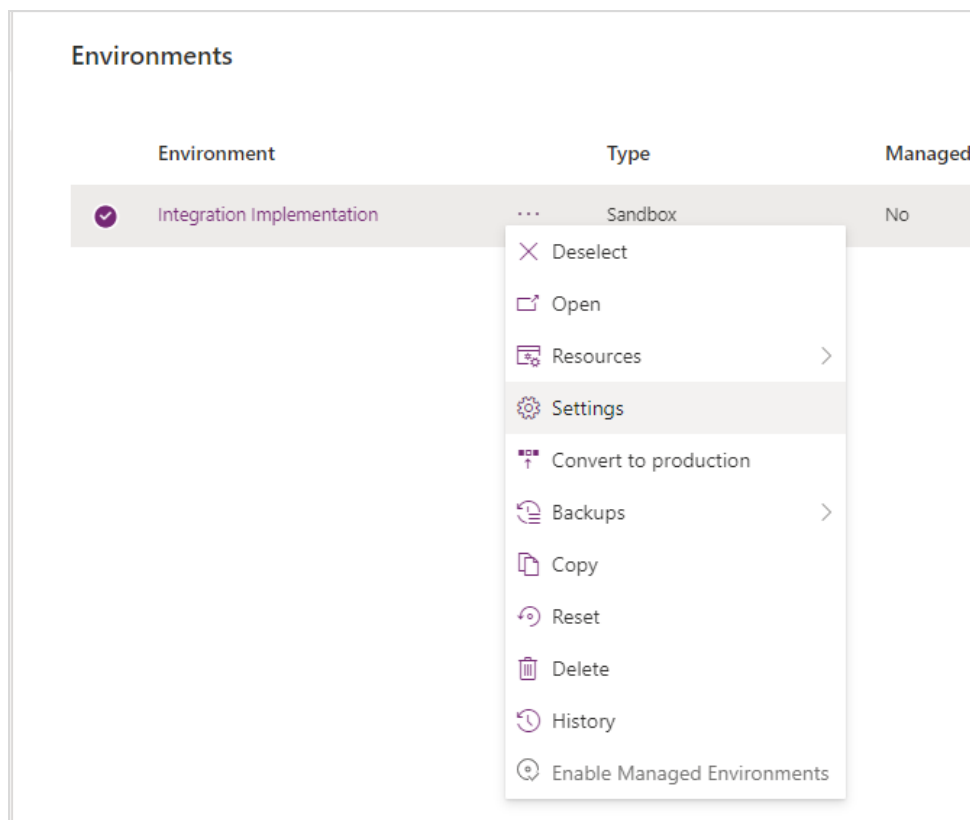
Admins must perform the steps described in this section to enable the out-of-the-box experience for end users.

Specifically, an admin must assign a new security role called "ZoomInfo App Access" to an end user, enabling the user to view the ZoomInfo App and custom forms for Accounts, Contacts, and Leads.

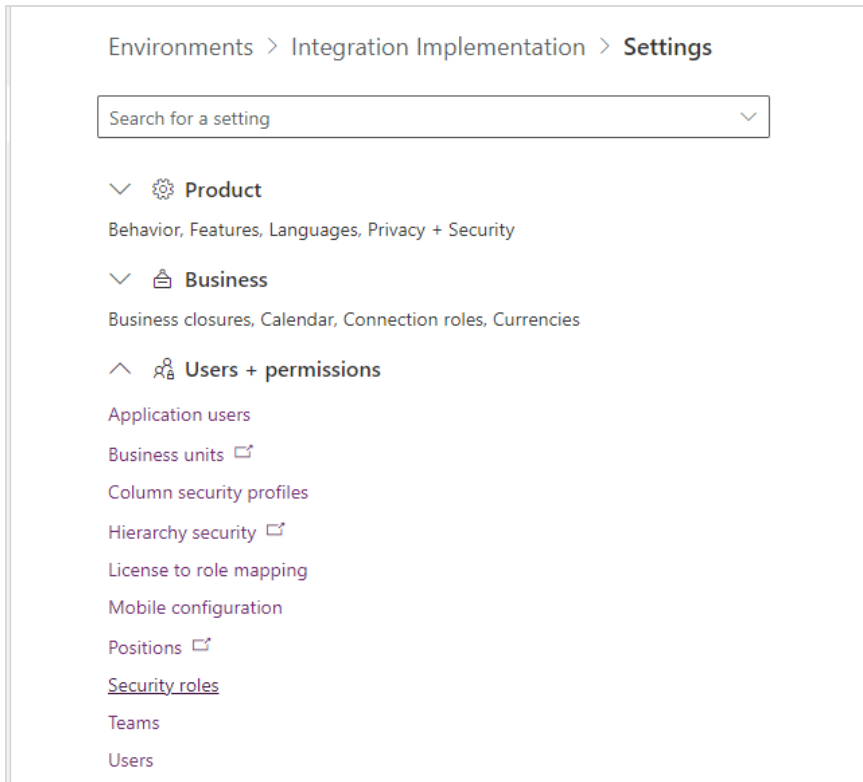
1. Log into the Power Platform admin center.
(<https://admin.powerplatform.microsoft.com/>).
2. Select **Environments** from the left menu.



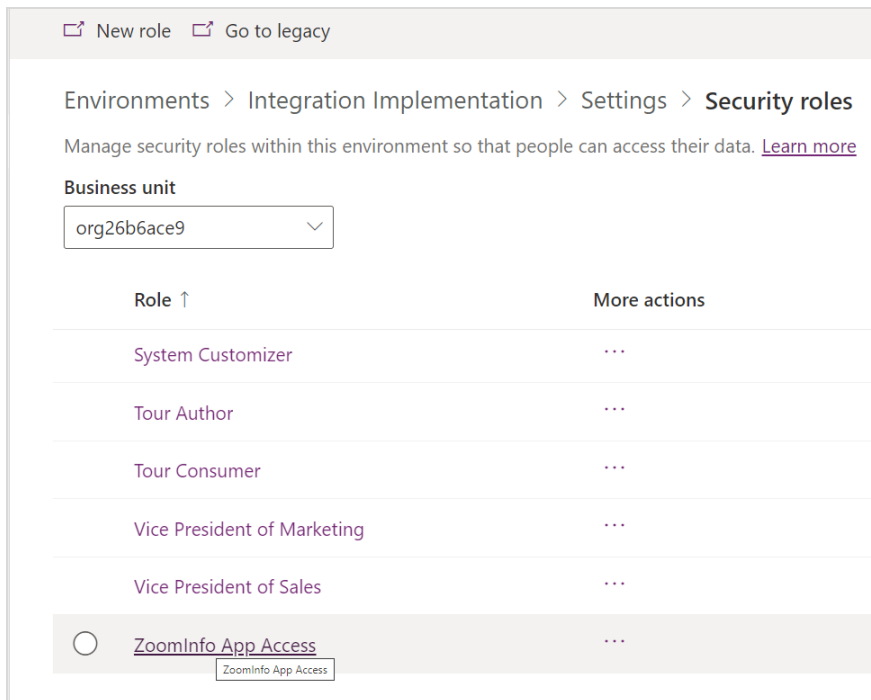
- Click the **Action (...)** menu next to the environment where you have installed the native app and select **Settings**.



- Expand the **Users and Permissions** section and select **Security roles**.

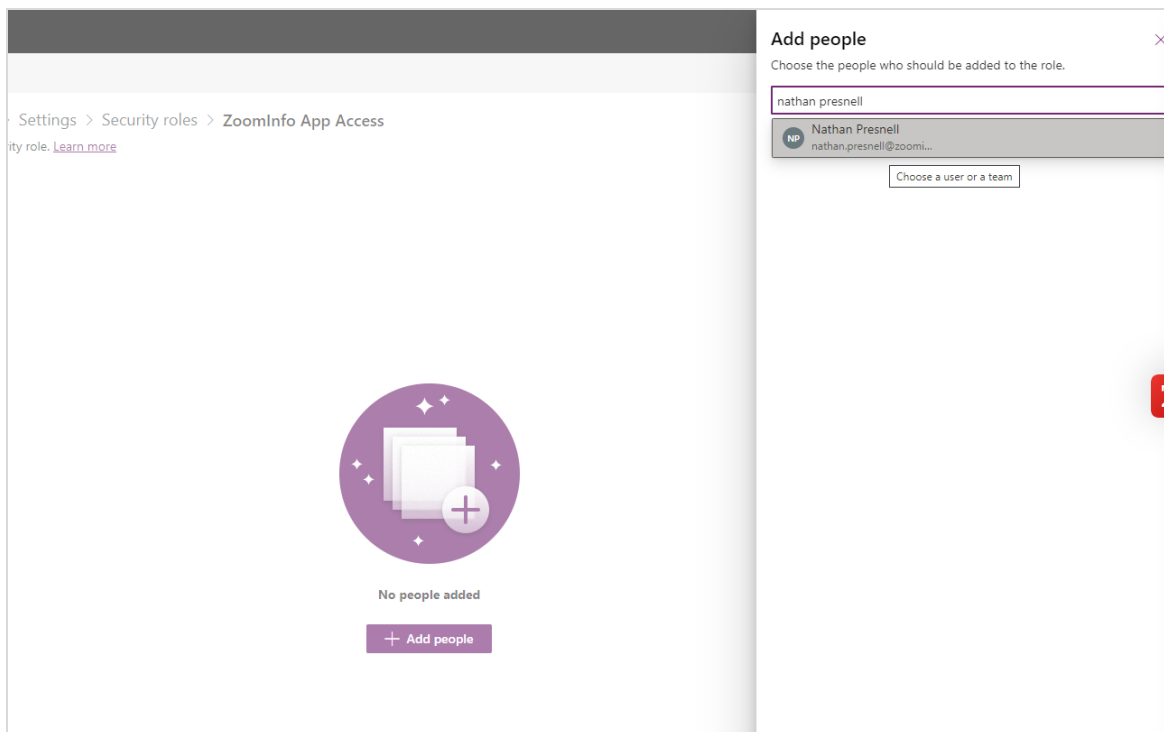


5. Scroll to the bottom of the list of security roles and select **ZoomInfo App Access**.



6. Click **Add People**.
7. In the panel on the right, input and select the names of the users that need access to the native app components.

- When done adding users, click **Add** at the bottom of the panel. Permissions are assigned to all added users.



With this security role assigned, the user can now perform the following procedures described in [Explore the Out-of-the-Box Experience](#):

- [Open the ZoomInfo for Dynamics App](#)
- [Explore the App](#)

Customize Your ZoomInfo Experience

You can leverage the same ZoomInfo elements provided in the out-of-the-box experience to customize your Dynamics 365 environment.

Customize the Sales Hub: The ZoomInfo for Dynamics Native Application includes Dynamics Forms that you can add to your standard or custom Account, Contacts, and Leads pages to provide users with inline access to ZoomInfo data.

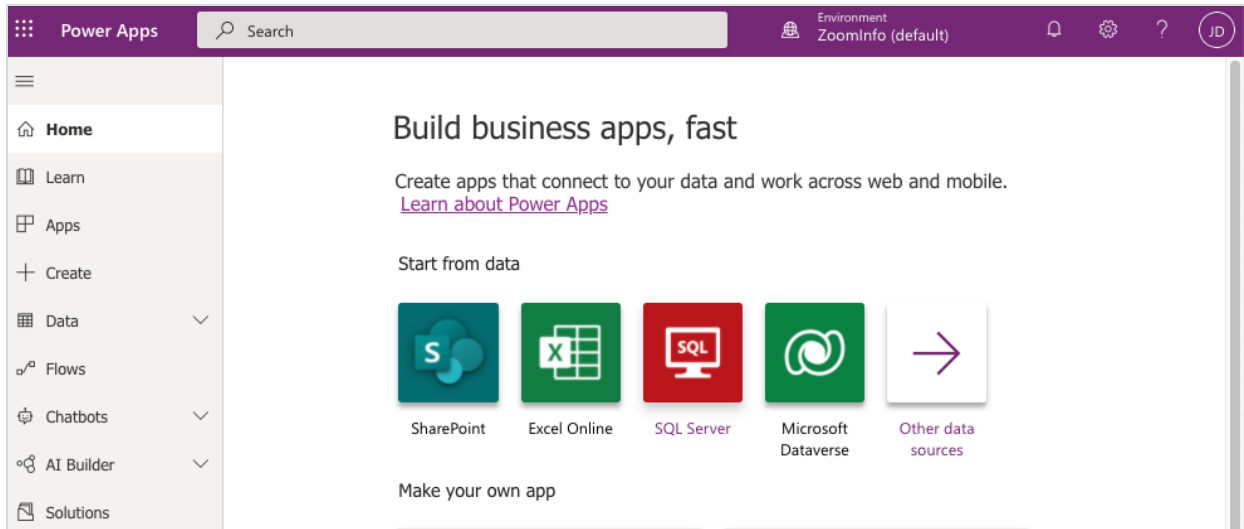
Customize your Dynamics 365 left navigation to include ZoomInfo elements: You can add a 'ZoomInfo Group' to your Dynamics 365 left navigation, providing easy access to ZoomInfo including the Admin Portal and the ZoomInfo Knowledge Center.

You can make these changes directly to the Sales Hub or you can create and apply a custom Solution that includes these changes.

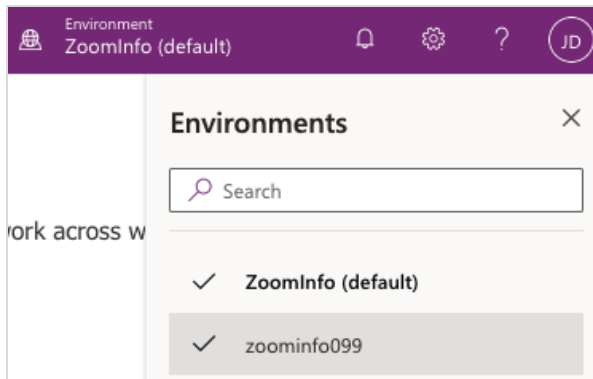
Customize the Sales Hub

When customizing your Dynamics app to include ZoomInfo, you will make the changes to your apps and forms through the PowerApps Portal.

1. Go to the **Power Apps** portal (make.powerapps.com).



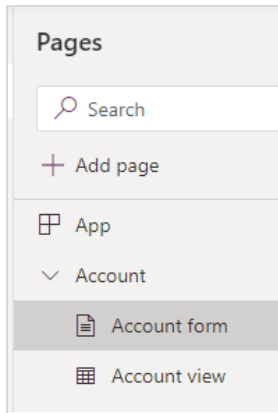
2. Select the environment in which you installed the ZoomInfo package.



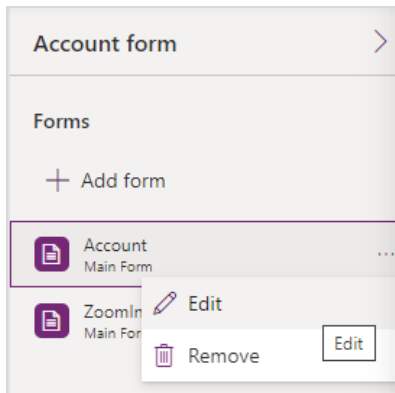
3. Click **Apps** in the left navigation.
4. Hover over the **Sales Hub**, click the **Action (...)** menu to the right and select **Edit**.

Customize the Form Component Using the Form Designer

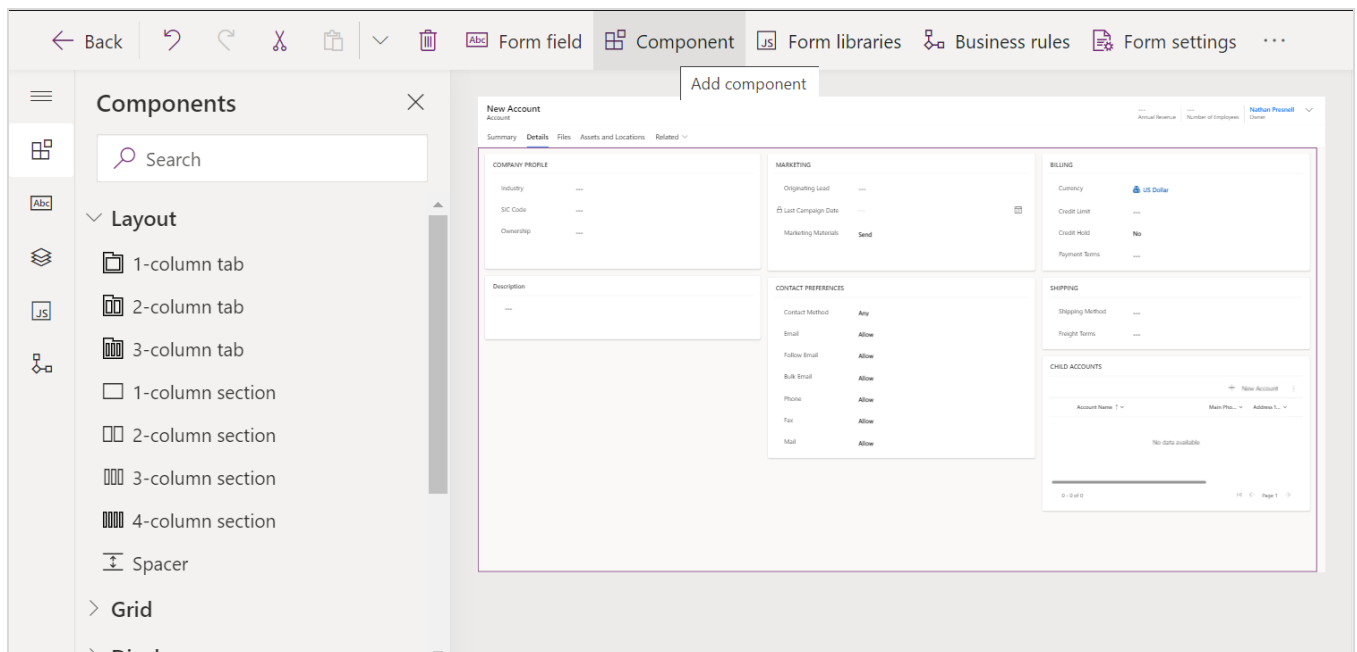
1. Select the object and form that you would like to edit from the left (e.g., **Account**, **Contact**, or **Lead**).



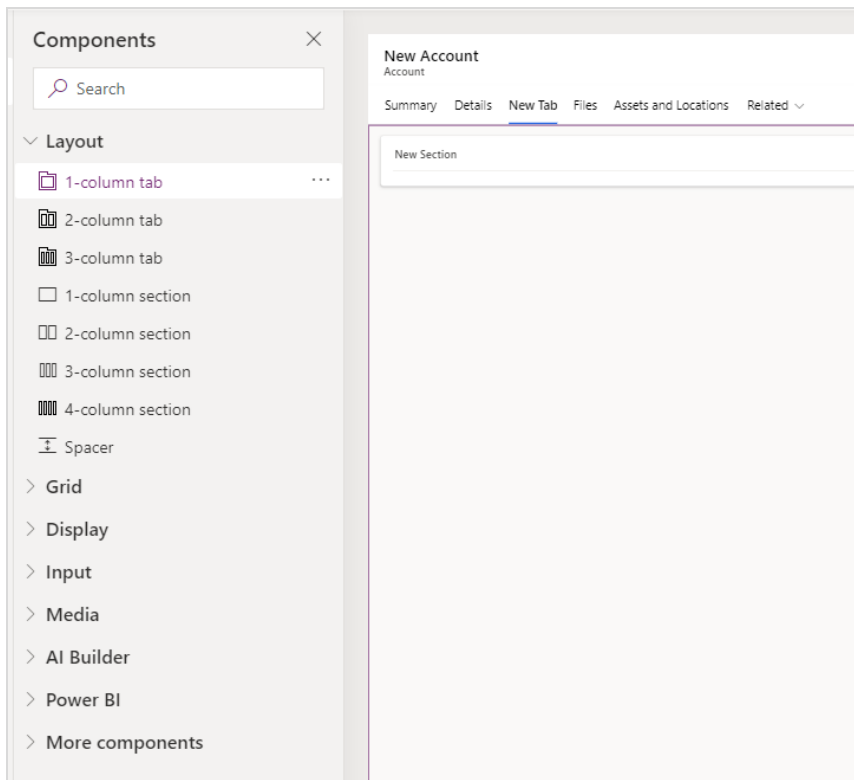
2. On the right side of the page, hover over the individual form that you would like to edit. Click the **Action (...)** menu and select **Edit**.



3. From the page for the selected form, select **Components** from the left or top menu.



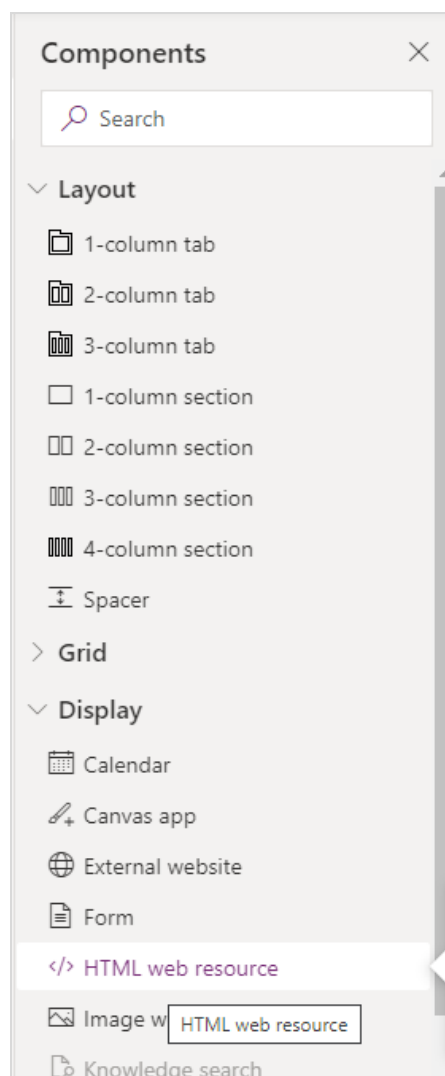
4. Click the **1-column section** component to create a new tab on your account form. Once added, you can drag to where you want it.



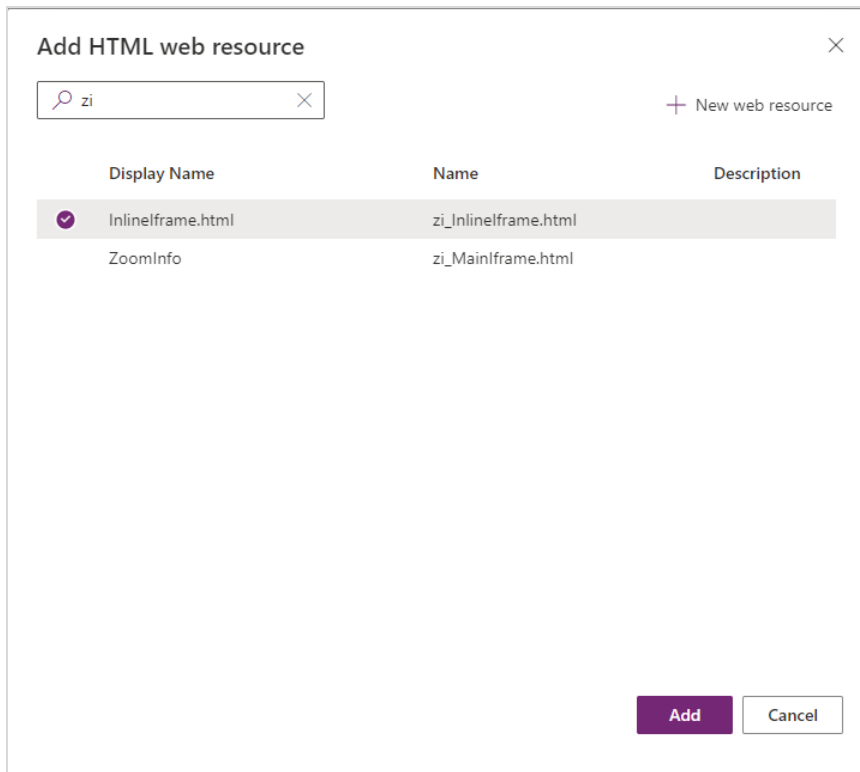
5. Single-click your new tab within the form and provide a **Label** and **Name** (e.g., *ZoomInfo* or *SalesOS*).

The image shows a vertical panel for the 'ZoomInfo' tab. At the top, it says 'ZoomInfo Tab' with a right arrow. Below this are two tabs: 'Properties' (selected) and 'Events'. Under 'Properties', there are two expandable sections: 'Display options' and 'Formatting'. In the 'Display options' section, there are fields for 'Label *' (containing 'ZoomInfo') and 'Name *' (containing 'ZoomInfo'). Below these are four checkboxes: 'Expand this tab by default' (checked), 'Expand first component to full tab' (unchecked), 'Hide on phone' (unchecked), and 'Hide' (unchecked). The 'Formatting' section has a 'Layout' dropdown menu set to '1 column' and a 'Column 1 Width' text field containing the number '100'.

6. Click on the form where it says **New Section** to select it.
7. On the left side menu, select **Display > HTML Web Resource**.

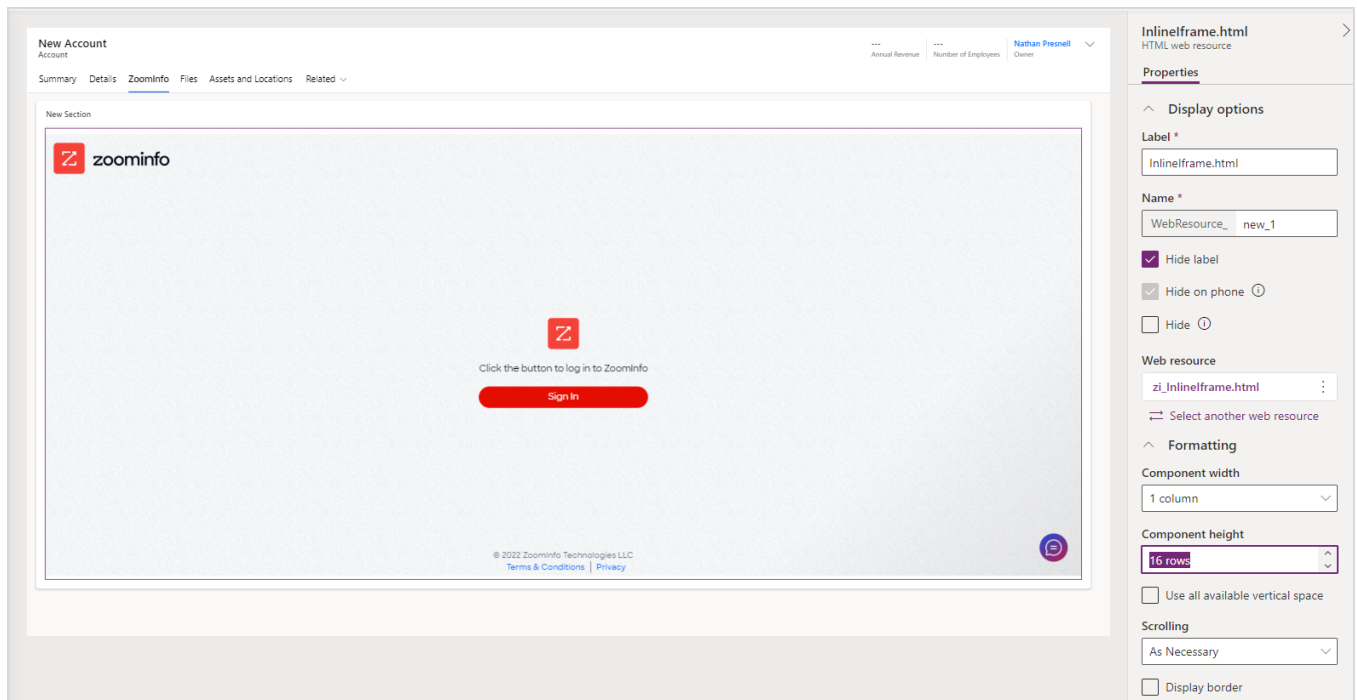


8. Here, you'll add the ZoomInfo inline frame. Search for 'zi' in the search bar in the upper-left.
9. Click zi_InlineIframe.html and then click **Add**.

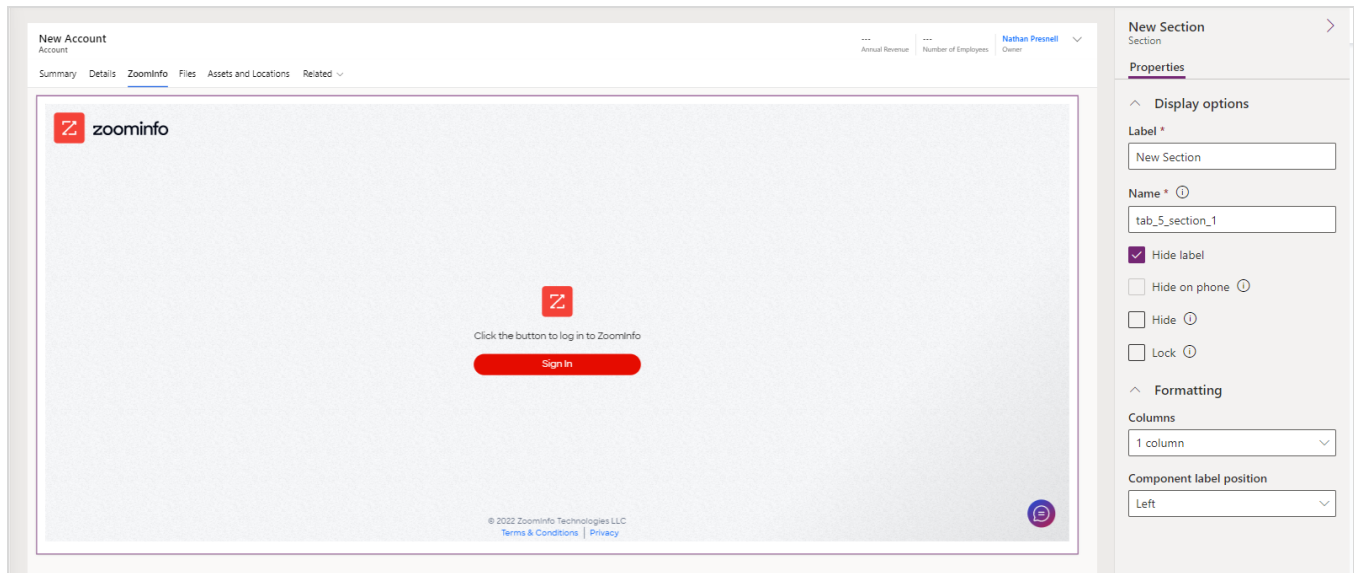


The HTML Web Resource is added to the page.

10. In the right pane, adjust the **Properties** to increase the height to 16 rows for the best viewing experience.

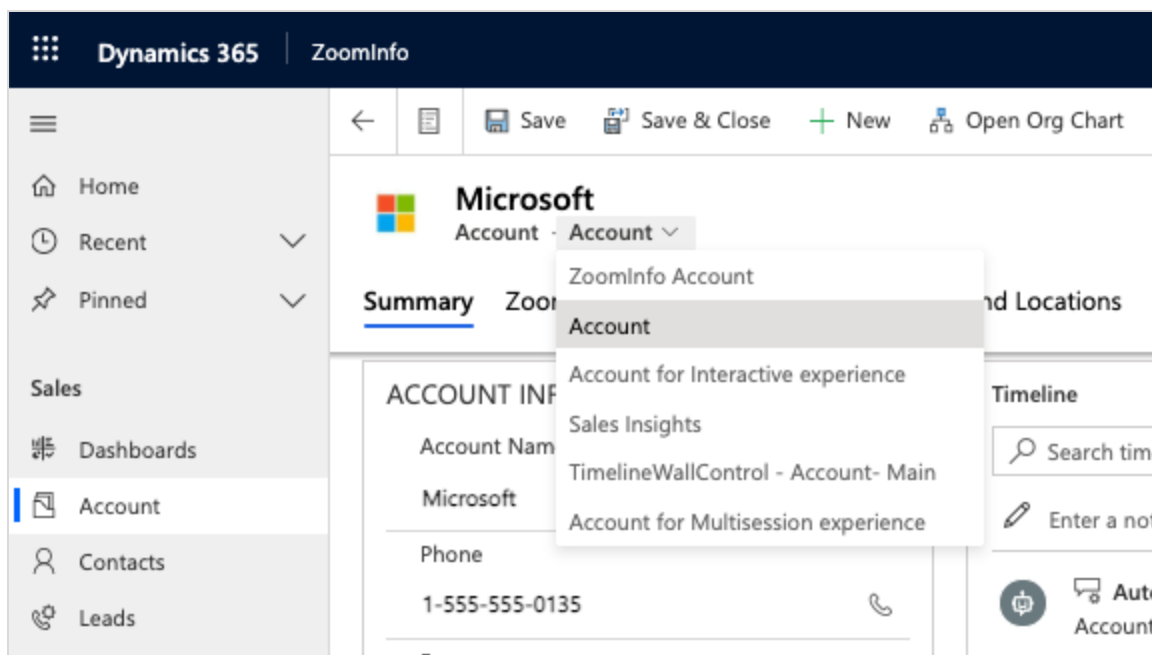


11. Optionally, you can remove the extra section label by clicking **New Section** and selecting **Hide Label**.

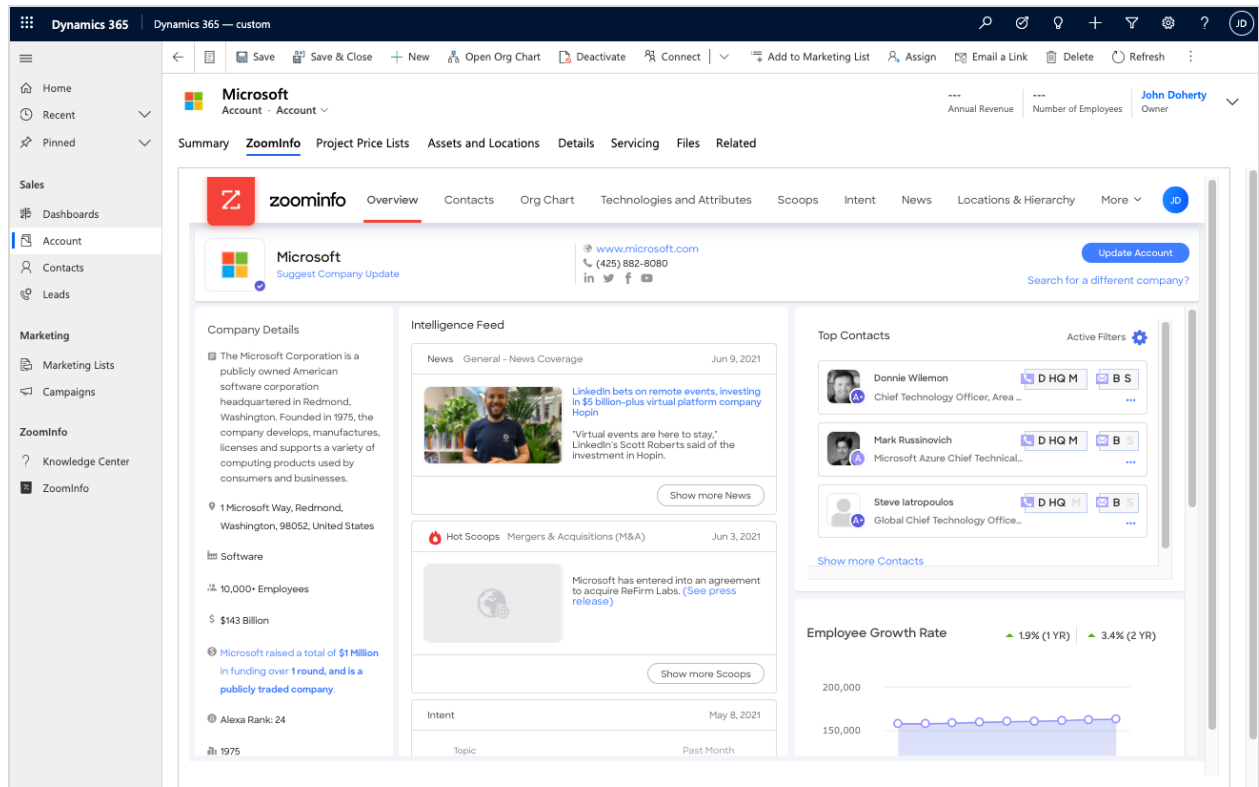


12. Click **Save** and then **Publish**.

Tip: Before configuring the Contact and Lead entity using these same steps, we recommend checking the impact of your customization by navigating to Dynamics 365 and opening the standard Account page for a company.



The ZoomInfo tab you added is now included. Click the **ZoomInfo** tab to see ZoomInfo data about the Account.



13. Repeat the same steps for the Contact and Lead forms.

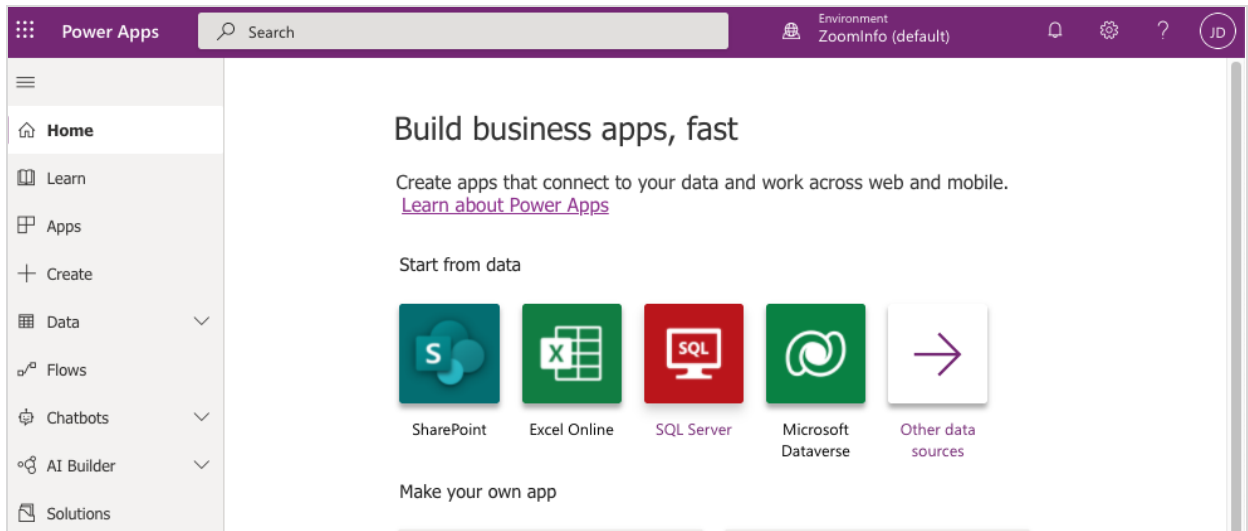
Add the ZoomInfo Group to an App

You can add a ZoomInfo Group to your left navigation to customize your Dynamics app. The Group includes a:

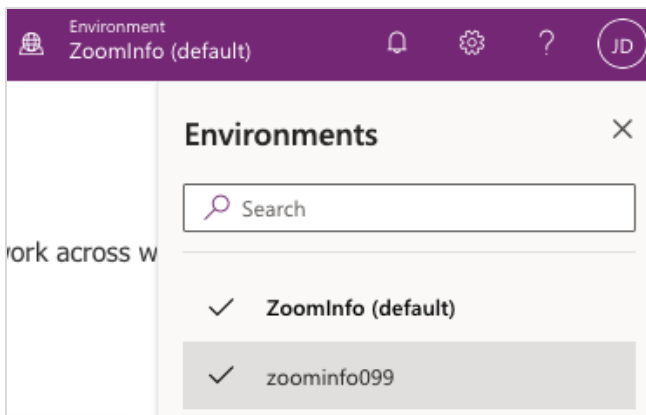
- Web Resource that opens the full ZoomInfo app within your Dynamics app, letting users perform searches and enabling ZoomInfo admins to access the Admin Portal to configure export preferences, custom mapping, and other settings.
- Link to the ZoomInfo Knowledge Center.

Add a Web Resource for the ZoomInfo App

1. Go to the **Power Apps** portal (make.powerapps.com).

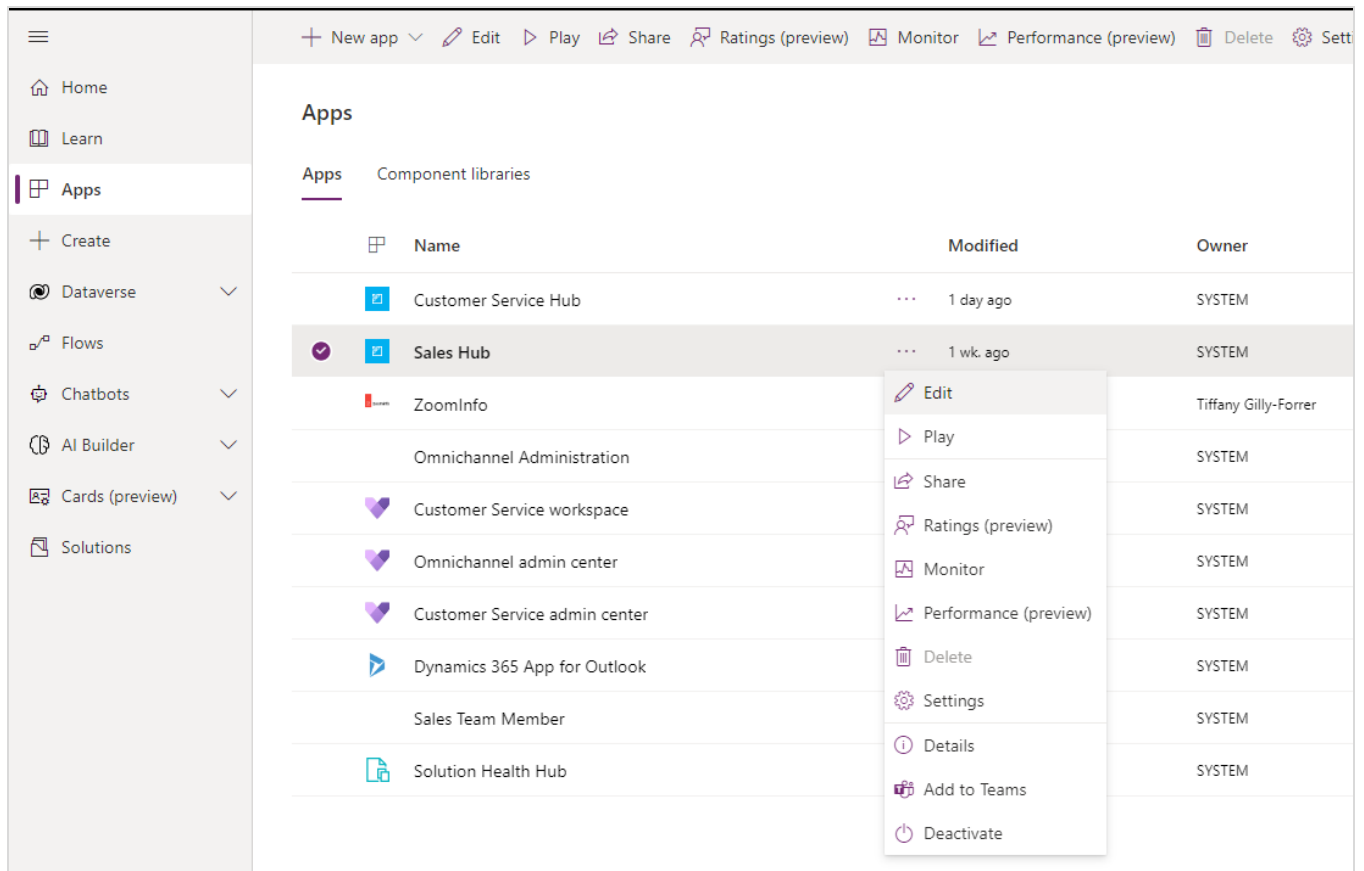


2. Select the environment in which you installed the ZoomInfo package.

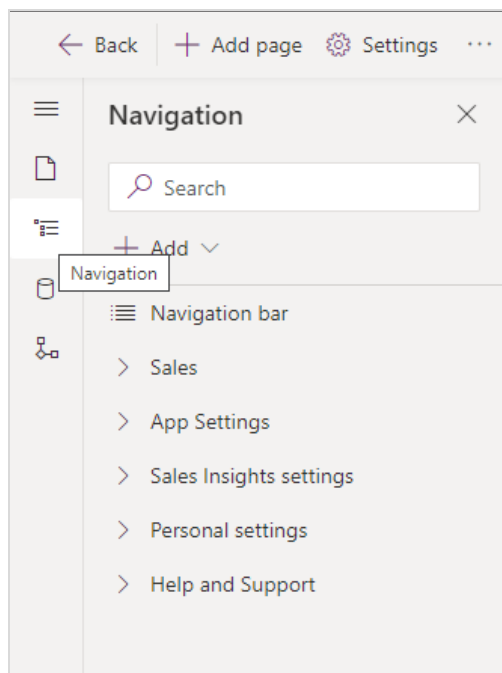


3. Click **Apps** in the left navigation.
4. Select the app to which you want to add ZoomInfo Group, click the three dots (...) menu and click **Edit**.

In this example, we selected the *Sales Hub* app.

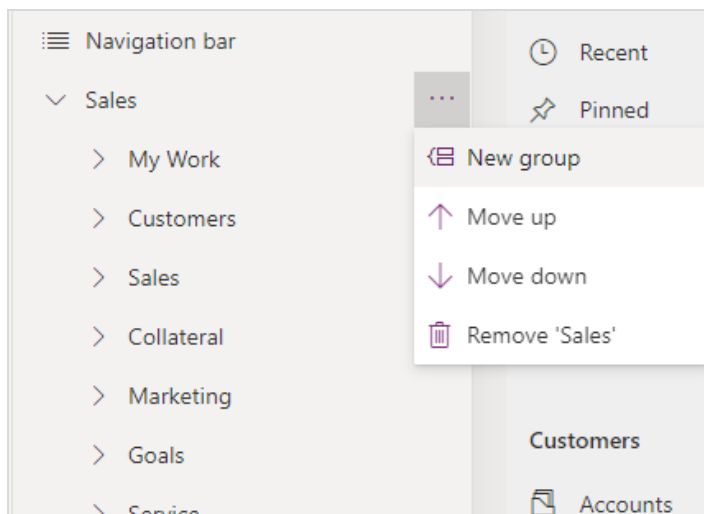


5. Click the **Navigation** icon from the left menu.

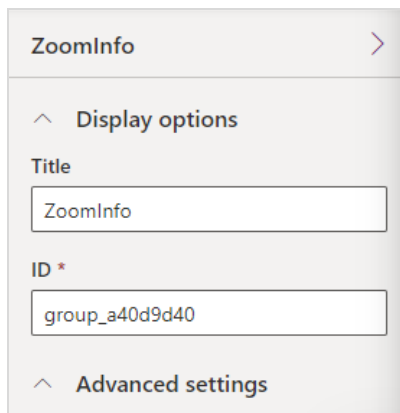


6. Hover over the right side of the line denoting the area where you would like to add the new ZoomInfo group.

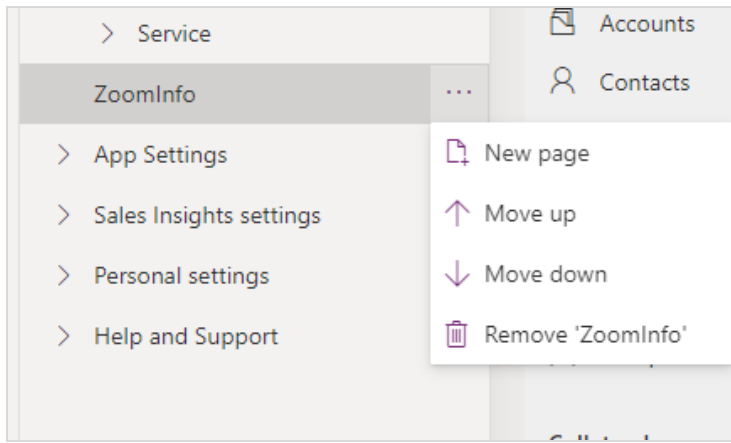
7. Click the three dots to open a dropdown menu and select **New Group**.



8. Once created, you will automatically have the properties for the new group open on the right of the screen. Specify the **Title** for the group (e.g., *ZoomInfo*).



9. To add the SalesOS component to your ZoomInfo group:
 - a. Hover over your newly created ZoomInfo group in the left menu.
 - b. Click the three dots on the right
 - c. Select **New Page**.



10. Configure the **New subarea** properties:

- **Content type:** Select Web resource
- **URL:** Input zoominfo
- **Title:** Type ZoomInfo or SalesOS

11. Click **Add**.

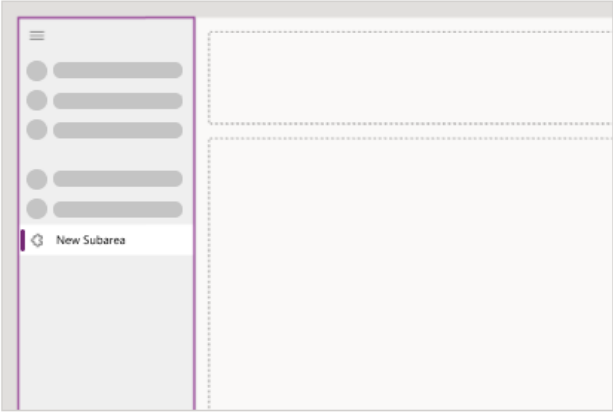
A screenshot of a 'New subarea' dialog box. The dialog has a title bar with a close button (X). On the left, there is a preview of a navigation menu with a new subarea entry highlighted. On the right, there are three input fields: 'Content type' (a dropdown menu with 'Web resource' selected), 'URL' (a dropdown menu with 'ZoomInfo' selected), and 'Title' (a text input field with 'SalesOS' entered). At the bottom right, there are two buttons: 'Add' (in a purple box) and 'Cancel' (in a white box with a purple border). Below the preview, there is a small text block: 'Adding a subarea creates an entry in your site map navigation. This lets users navigate directly to this item while using the app.'

Add a Link to the ZoomInfo Knowledge Center

To add the Knowledge Center:

1. Add another page to the **ZoomInfo** group.
2. Configure the the **New subarea** properties:
 - **Content type:** URL
 - **URL:** Input <https://university.zoominfo.com/pages/knowledge-center-home>
 - **Title:** Type *Knowledge Center*
3. Click **Add**.

New subarea ✕



Adding a subarea creates an entry in your site map navigation. This lets users navigate directly to this item while using the app.

Content type

URL

URL

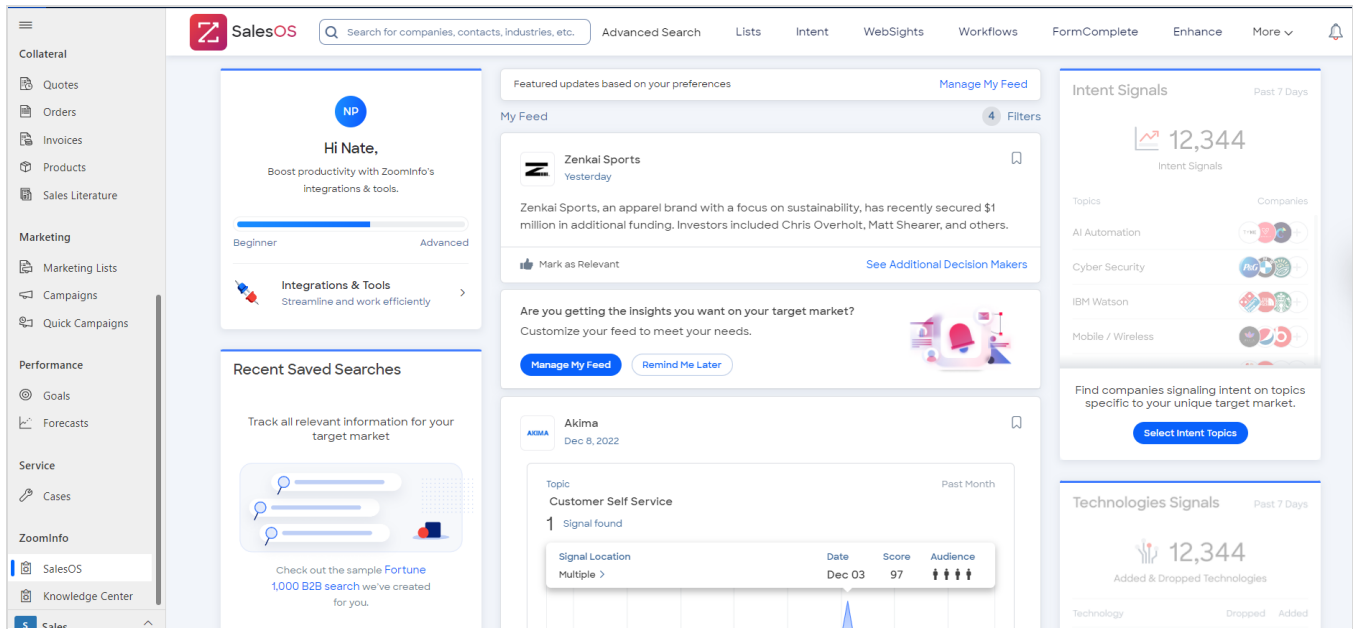
<https://university.zoominfo.com/pages/knowledge-center-home>

Title

Knowledge Center

Add **Cancel**

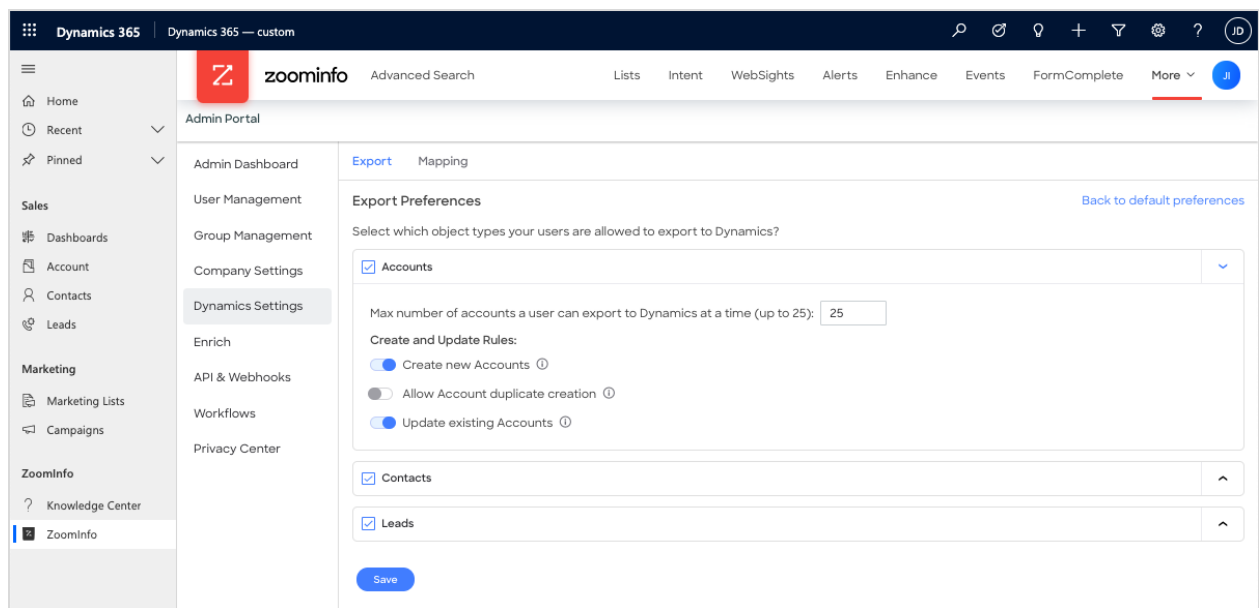
4. Click **Save** and then **Publish**.
5. After it is published, refresh the page in Dynamics and view your changes.



Export Preferences

ZoomInfo admins can limit the objects that can be exported:

1. Go to **More > Admin Portal > Dynamics Settings**.
2. From the **Export** tab, select each object type you want your users to be able to export to Dynamics. You can set a maximum number of records (up to 25) that a user can export to Dynamics.

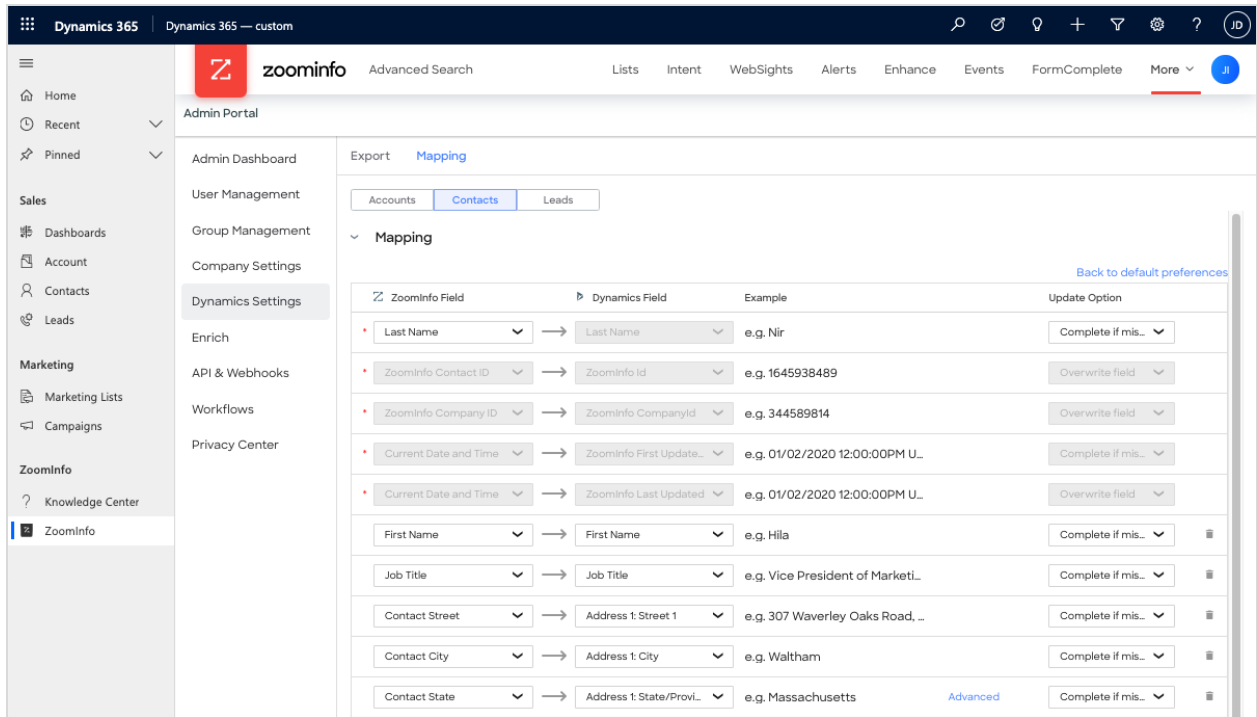


3. Click **Save** to apply the changes for all users in your organization's ZoomInfo instance.

Custom Mapping

ZoomInfo admins can control how ZoomInfo fields are mapped to corresponding Dynamics fields.

1. Go to **Admin Portal > Dynamics Settings**.
2. Click the **Mapping** tab.




On the **Mapping** tab, use the **Accounts**, **Contacts**, and **Leads** tabs to review the default mappings for each object type and make any mapping changes.

Field	Description
ZoomInfo Field	Available ZoomInfo fields. Required fields are marked with an asterisk (*).
Dynamics Field	Available Dynamics fields. These fields are retrieved directly from your Dynamics instance.
Update Options	Select an option: <ul style="list-style-type: none">• Complete if missing (default) - Only complete with ZoomInfo data if none exists in Dynamics.• Overwrite field - Overwrite existing data in Dynamics with ZoomInfo data.

Add or Remove Fields

Add fields by clicking **Add Row** at the bottom of the field list. Each field that you add must be mapped to a corresponding field in your integration.

Click the  trash icon to remove any fields that you do not want to map.

Important: If you are mapping to a picklist field (dropdown select) in Dynamics, you will want to take into account the internal values for each option. For assistance with finding internal values in Dynamics please see the video below.

Set a Hierarchy for ZoomInfo Data Within a Single Dynamics Field

In some cases, you may want multiple ZoomInfo fields to be stacked hierarchically within a single Dynamics field.

For example, you may want to import both the ZoomInfo Direct Phone and Company Phone fields into the Dynamics Business Phone field.

1. Map **Direct Phone** to **Business Phone**.
2. Map **Company Phone** to **Business Phone**.

The first occurrence of the **Business Phone** field is denoted with number 1, and the second with number 2.



Field hierarchy allows for both first and second choice values for selected Dynamics fields. For exported records where more than one data point is available from ZoomInfo (such as phone numbers) you can prioritize the data by preference within your mapping.

Test and Save

After configuring mapping, click **Test Mapping** or **Save Settings**.

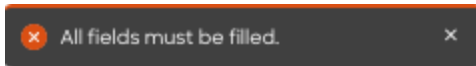
Test Mapping

Save Settings

Test Mapping

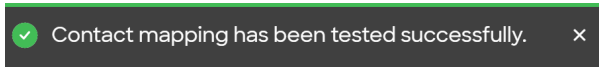
Before saving your mapping changes, click **Test Mapping** to export and delete a test record using your current settings.

- If the test record cannot be created, this is typically due to an error in the mapping settings. For example, mappings cannot be saved with a blank field.



Adjust the settings and click **Test Mapping** again.

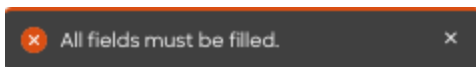
- If the test is successful, a notification displays.



Save Settings

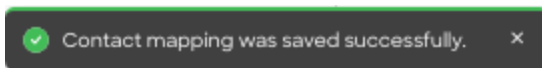
After performing a successful test mapping, click **Save Settings**.

- If the mappings are not set correctly, an error notification displays indicating the adjustments needed.



Remove any unfilled rows and click **Save Settings** again.

- If mappings are correctly configured, a success notification displays.



Duplicate Checking

When a user exports records from ZoomInfo to Dynamics, duplicate checking logic is applied to avoid creating duplicate records within Dynamics.

Admin Control of Duplication Settings

A ZoomInfo admin can control the user's available options for handling duplicates by configuring the default duplication settings for the integration in the Admin Portal. When a duplicate is encountered during export, users can choose the default behavior set by the admin or select other available options.

User Options During Export

During an export, duplicates are flagged and presented to the user. Depending on available options set by an admin, the user can choose to update an existing record, create a duplicate record, or not export the record.

Duplicate Logic

ZoomInfo checks for specific criteria, in a specific order, to determine if existing data in Dynamics matches data being exported.

For companies: Companies in ZoomInfo are equivalent to accounts in Dynamics. When exporting companies to Dynamics, ZoomInfo will check for duplicate Dynamics accounts using criteria applied in the following logical order:

1. ZoomInfo ID
2. Exact Company Name
3. Exact Company Website

For people: People in ZoomInfo are designated as contacts, and can be exported as Dynamics contacts or leads.

When exporting contacts to Dynamics, ZoomInfo will check for duplicate Dynamics contacts or leads using criteria applied in the following order:

Contacts (people associated with a company)

1. ZoomInfo ID
2. Email Address
3. Exact First Name + Exact Last Name + Exact Company Name

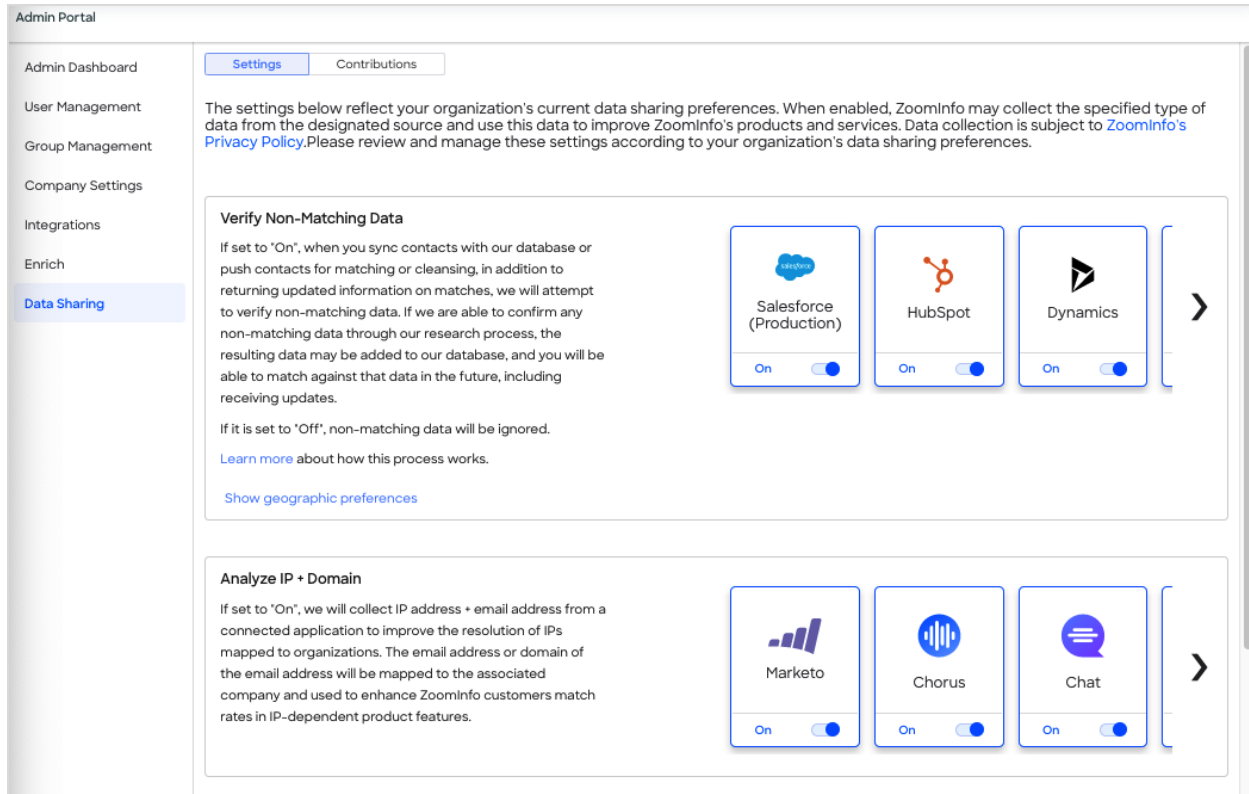
Leads (people not associated with a company)

1. ZoomInfo ID
2. Email Address
3. Exact First Name + Exact Last Name + Exact Company Name

Note: If a person in Dynamics exists as both a contact and a lead, ZoomInfo will present the contact record as the duplicate.

Data Sharing

The Data Sharing page in the Admin Portal is enabled if your organization has not contractually opted out of data sharing with ZoomInfo that is intended to analyze your use of connected integrations. Data sharing helps to improve the ZoomInfo service and make recommendations to you.



1. Go to **Admin Portal > Data Sharing**.

- If your organization has chosen to opt-out of data sharing, the following message displays:

As a precaution, this function is set to OFF and is not editable, in order to prevent unintended changes that may be in conflict with your organization's contractual terms.

- If your organization has not opted out of data sharing, the **Data Sharing** page displays with the ON/OFF toggles enabled.
2. Data collection is subject to ZoomInfo's Privacy Policy. Review the policy details using the link provided.
 3. Review and manage the data sharing settings according to your organization's data sharing preferences.
 4. Over time, you can review the **Contributions** tab to monitor the contributions made by your organization.