

# Install ZoomInfo Sales connector for Creatio

ZoomInfo Sales Connector for Creatio lets you enrich account and contact records in the Customer360 app quickly and easily with ZoomInfo data. You can also leverage the pre-configured web service methods in the app to set up enrichment processes for other objects.

The app has the following key features:

- Enrich your accounts and contacts with ZoomInfo data.
- Specify rules by which to search for matching Creatio contacts: by personId, email, full name.
- Specify whether to overwrite existing Creatio data with ZoomInfo data or only populate empty fields.
- Import new contacts from ZoomInfo.

# Install the app

To install the app, follow the instructions in Creatio documentation: [Install apps from the Marketplace](#).

Download the ZoomInfo Sales connector for Creatio app via the following link: <https://marketplace.creatio.com/app/zoominfo-sales-connector-creatio>

**ATTENTION.** This connector supports two ZoomInfo APIs: the **Enterprise API (Legacy)** and the **GTM API**.

By default, the connector uses the **GTM API**. To switch to the **Enterprise API**, enable the "**MrktZoomInfoLegacyApiEnabled**" feature [manually](#).

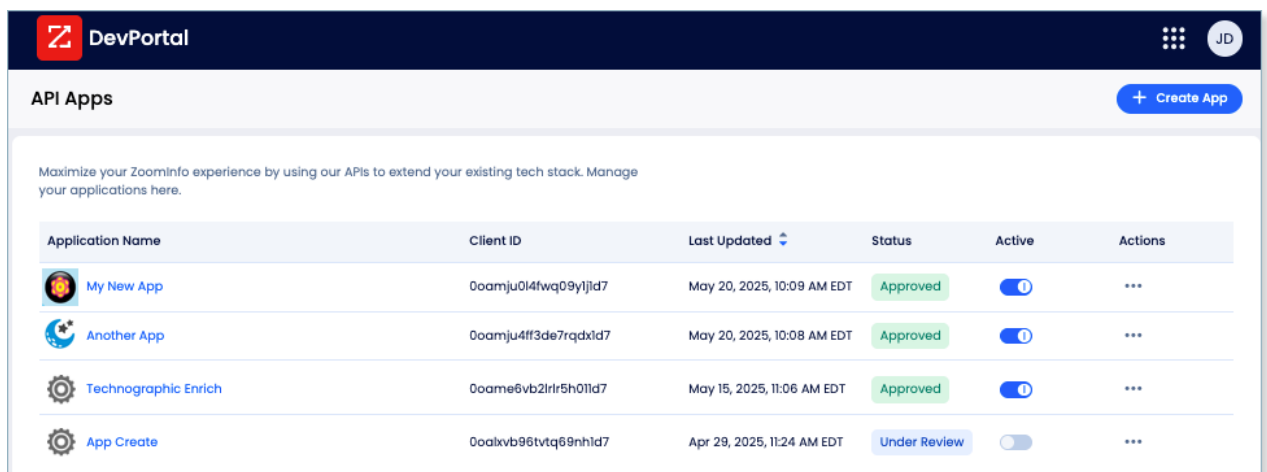
If you need assistance, contact Creatio support at [support@creatio.com](mailto:support@creatio.com)

For questions about the **ZoomInfo APIs** themselves, contact your **ZoomInfo account manager**.

## Connect the app to ZoomInfo

### Create ZoomInfo API keys and add them to Creatio

1. Open ZoomInfo integration settings: <https://developer.zoominfo.com/#/>
2. Click [ + Create App ].



3. For [ App Type ], select "API App".
4. Enter an arbitrary name of the integration in the [ App Integration Name] field. For example, "Creatio app."

- For [ *Authentication Method* ], select "Authorization Code".

**DevPortal**

< API Apps / Create App

**\* App Integration Name**

Creatio App

**\* Authentication Method**

**Authorization Code**  
User-specific authentication. Required for partner applications used by shared customers.

**Client Credentials**  
Server-to-server authentication for automated flows.

**Data**

Company

Contact

Intent

News

Scoops

- Enter the redirect URI of the ZoomInfo connector in the [ Redirect URI ] field. Use the following format:

<https://sitename.domain.com/0/rest/MrktOAuthFlow/ZoomInfoCallbackHandler>.

- Go to the "Scopes" block. Select the following options:

Company

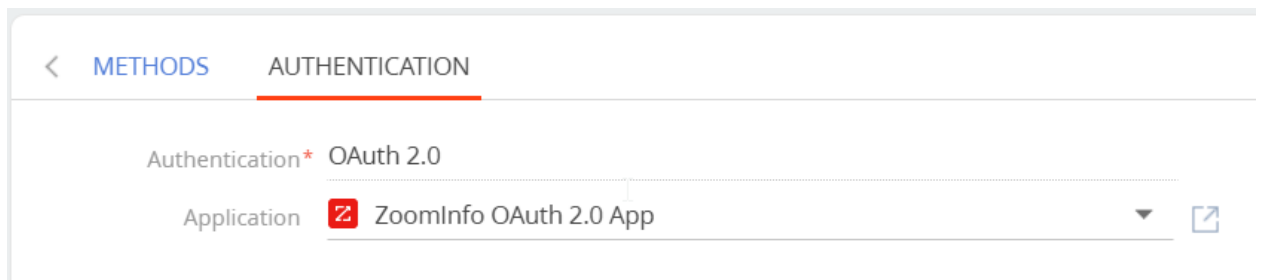
Contact

Intent

News

Scoops

- Click [ *Save Changes* ].
- Save the "Application Id" and "Secret" values on the page that opens.
- Follow the instructions in the Creatio documentation: [Set up a new OAuth 2.0 application](#). Fill out the [ *Client Id* ] and [ *Client secret* ] fields with the "Application Id" and "Secret" values, respectively.



## Set up the app

First, specify how ZoomInfo data is going to interact with your existing Creatio records. Manage the procedure in the “Overwrite existing data with data from ZoomInfo” (“MrktOverwriteWithDataFromZoomInfo code”) system setting. This setting specifies whether ZoomInfo data replaces existing data or overwrites it:

- When disabled (default), Creatio imports ZoomInfo data only if the corresponding field is empty.
- When enabled, Creatio overwrites existing data with ZoomInfo data.

Second, configure the app lookups.

Lookups for **accounts**:

- **ZoomInfo industries.** Maps base values of industries from ZoomInfo to values in Creatio.
- **ZoomInfo’s number of account employees.** Maps values of the number of account employees in ZoomInfo to values in Creatio. Define the employee number range and map it to the values of the “No. of account employees” lookup. The enrichment process handles values from ZoomInfo and compares it to the range in Creatio.
- **Annual revenue.** Maps values of the annual revenue in ZoomInfo to values in Creatio. Define the revenue range. The enrichment process handles values from ZoomInfo and compares it to the range in Creatio.

**Note.** If the enrichment process does not find mapped values, Creatio does not populate the corresponding account fields.

Lookup for **contacts**:

**ZoomInfo department.** Decoupling table for base values of the “Departments” lookup. Map values from ZoomInfo to the values of “Departments” lookup. The enrichment process handles values from ZoomInfo and compares them to the values in Creatio.

If the enrichment process does not find a mapped department, Creatio does not populate the "Department" field on the account page is not populated.

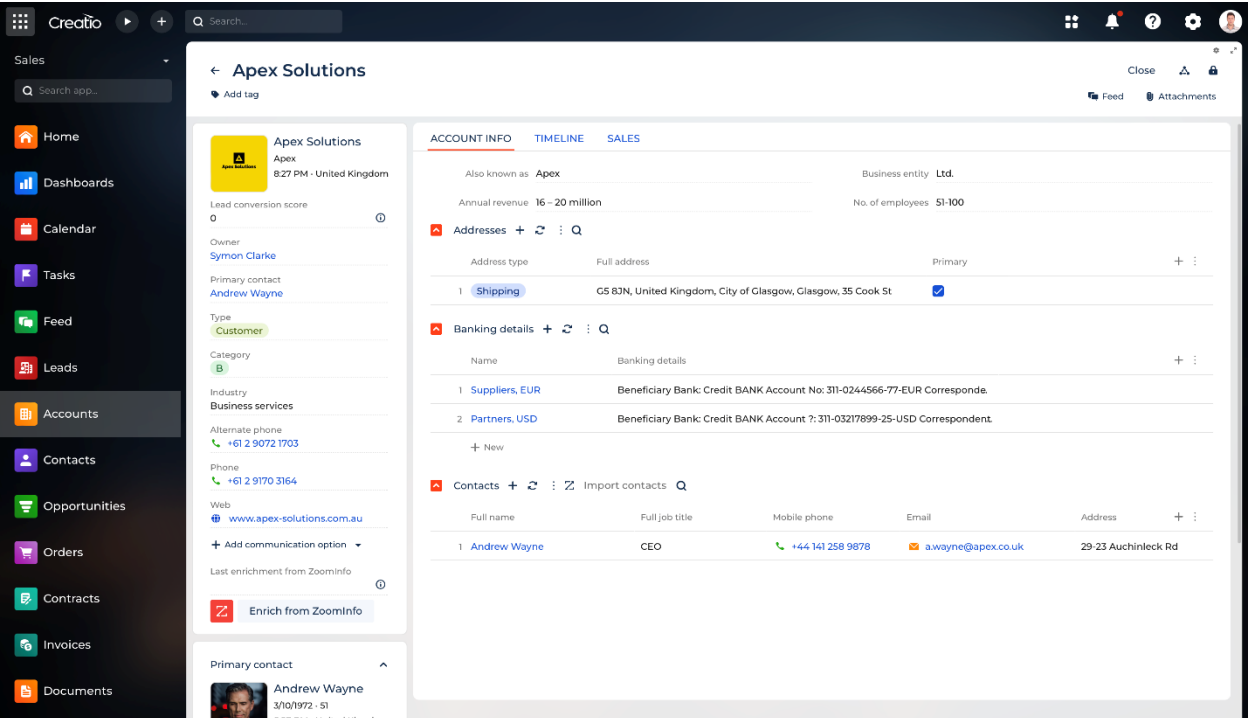
# Account enrichment

**Note.** You can enrich an account record only if you connect a ZoomInfo account to Creatio.

Field mapping between ZoomInfo and Creatio is non-editable.

1. **Open the Accounts** section.
2. Select an account that has the “Web” or “Last enrichment from ZoomInfo” fields populated.

**Note.** Creatio populates the “Last enrichment from ZoomInfo” field after the first successful enrichment.



The screenshot displays the Creatio interface for an account named "Apex Solutions". The account is located in the "Accounts" section of the left-hand navigation menu. The account record is shown in a detailed view with the following information:

- Account Info:** Apex Solutions, Apex, 8:27 PM - United Kingdom. Business entity: Ltd. Annual revenue: 16 - 20 million. No. of employees: 51-100.
- Addresses:** A list of addresses with columns for Address type, Full address, and Primary. One address is listed: Shipping, G5 8JN, United Kingdom, City of Glasgow, Glasgow, 35 Cook St.
- Banking details:** A list of banking details with columns for Name and Banking details. Two entries are listed: Suppliers, EUR (Beneficiary Bank: Credit BANK Account No: 311-0244566-77-EUR Correspondent) and Partners, USD (Beneficiary Bank: Credit BANK Account #: 311-03217899-25-USD Correspondent).
- Contacts:** A list of contacts with columns for Full name, Full job title, Mobile phone, Email, and Address. One contact is listed: Andrew Wayne, CEO, +44 141 258 9878, a.wayne@apex.co.uk, 29-23 Auchinleck Rd.
- Primary contact:** Andrew Wayne, 3/10/1972 - 51, 8:27 PM - United Kingdom.

3. **Click “Enrich from ZoomInfo.”**  
As a result, Creatio will populate the following fields:
  - “Name”
  - “Industry”
  - “Annual revenue”
  - “No. of employees”

Also, Creatio populates phone, web, and social network links in the **Communication options** component and addresses (Country, State, City, Street, Zip code) in the **Address** expanded list.

Creatio

Search

Sales

Search app...

Home

Dashboards

Calendar

Tasks

Feed

Leads

Accounts

Contacts

Opportunities

Orders

Contracts

Invoices

Documents

### Apex Solutions

← Apex Solutions

Close

Feed Attachments

Apex Solutions  
Apex  
8:27 PM · United Kingdom

Lead conversion score  
0

Owner  
Symon Clarke

Primary contact  
Andrew Wayne

Type  
Customer

Category  
B

Industry  
Business services

Alternate phone  
+61 2 9072 1703

Phone  
+61 2 9170 3164

Web  
www.apex-solutions.com.au

+ Add communication option

Last enrichment from ZoomInfo

Enrich from ZoomInfo

Primary contact  
Andrew Wayne  
3/10/1972 · 51  
8:27 PM · United Kingdom

ACCOUNT INFO TIMELINE SALES

Also known as Apex Business entity Ltd.

Annual revenue 16 - 20 million No. of employees 51-100

Addresses + ↻ 🔍

| Address type | Full address   | Primary                             |
|--------------|--|-------------------------------------|
| 1            | Chewton, OS B2M United Kingdom, City of Glasgow, Glasgow, 35 Cook St | <input checked="" type="checkbox"/> |

Do you wish to continue?  
We're about to enrich the account with data from ZoomInfo. Do you want to proceed?

No Yes

Contacts + ↻ 🔍 Import contacts

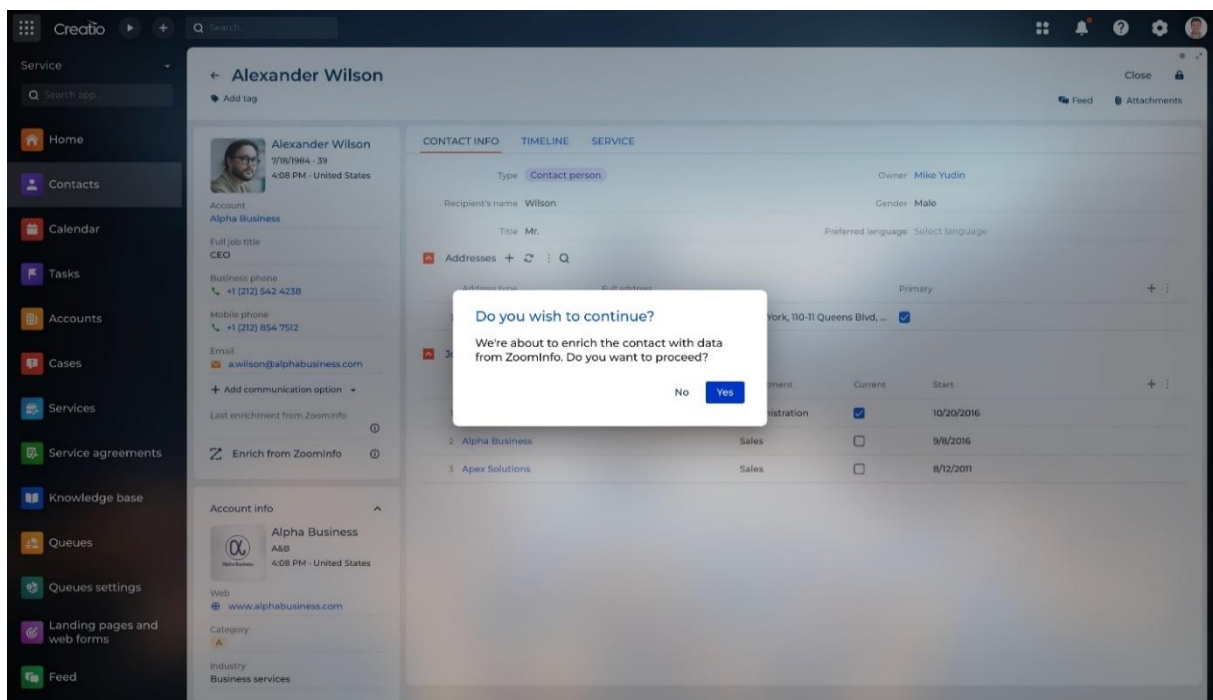
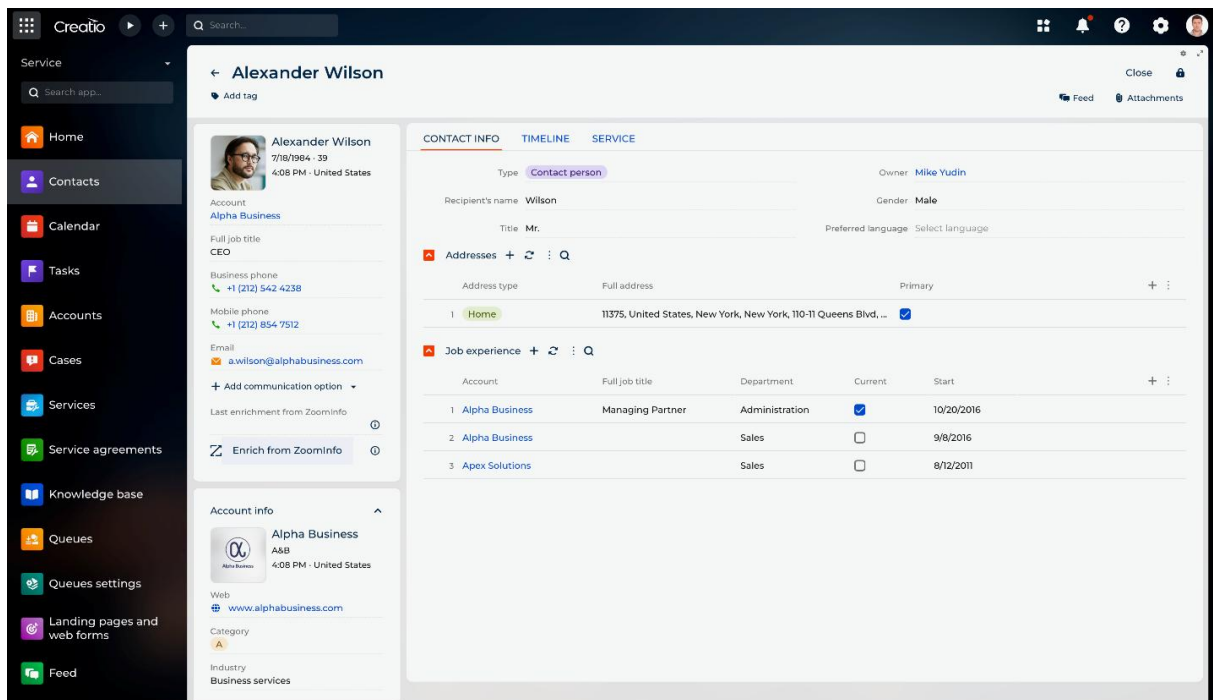
| Full name      | Full job title | Mobile phone     | Email              | Address             |
|----------------|----------------|------------------|--------------------|---------------------|
| 1 Andrew Wayne | CEO            | +44 141 258 9878 | a.wayne@apex.co.uk | 29-23 Auchinleck Rd |

# Contact enrichment

**Note.** You can enrich a contact record only if you connect a ZoomInfo account to Creatio.

Field mapping between ZoomInfo and Creatio is non-editable.

1. Go to the **Contacts** section → open the relevant record.
2. Click “Enrich from ZoomInfo.”



As a result, Creatio will populate the following fields:

- "Full name" ("First name" and "Last name")
- "Full job title"
- "Recipient's name"
- "Job function"
- "Department"
- "Management level"

Also, Creatio populates phone, email, and social network links in the **Communication options** component and addresses (Country, State, City, Street, Zip code) in the **Address** expanded list.

**Note.** Field mapping between ZoomInfo and Creatio is non-editable.

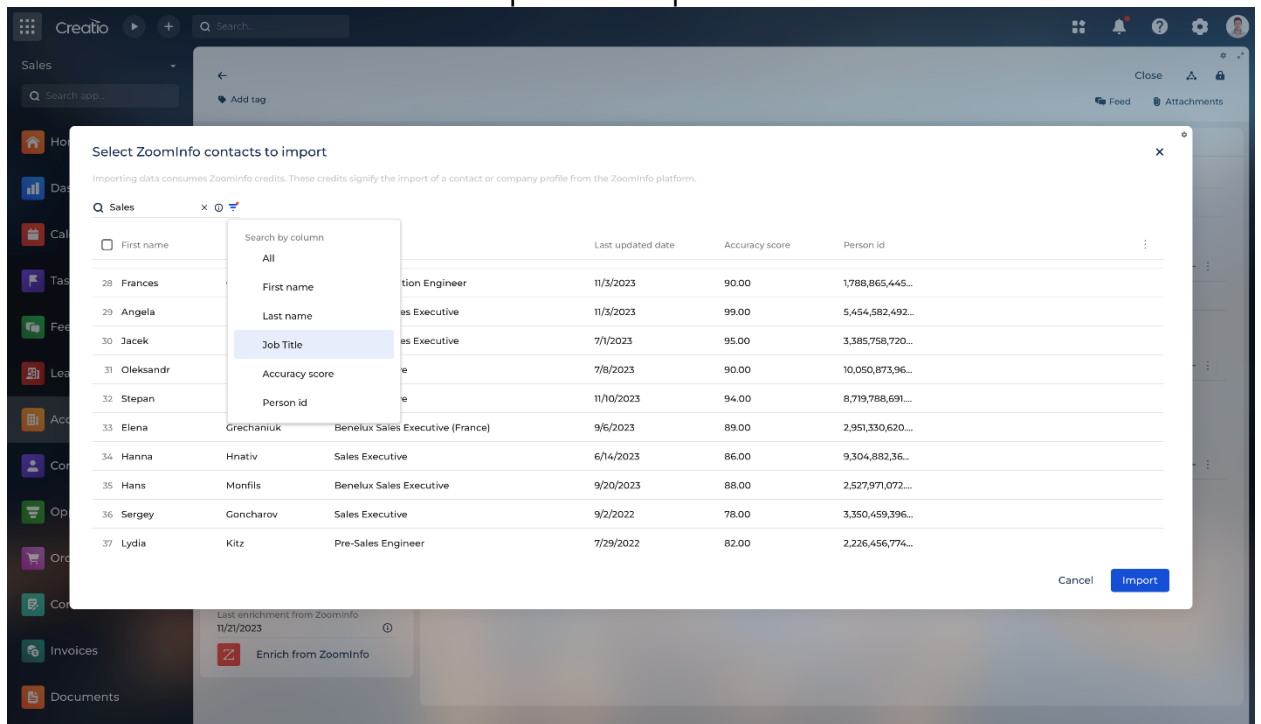
The app searches for matching contacts by ZoomInfoPersonId (contact ID from ZoomInfo). If ZoomInfoPersonId is not populated, the following rules are used, from higher to lower priority:

1. by email
2. by full name (first and last name) and CompanyId (account ID from ZoomInfo)

# Import contacts from ZoomInfo

After you enrich an account record, you can import contacts connected to that account to Creatio. To do this:

1. Go to the **Accounts** section → open the relevant record.
2. Click “Import contacts” on the **Contacts** expanded list. This opens a mini page
3. Select one or more contacts to import → “Import.”



Creatio searches for existing contact records that are similar to imported contacts by ZoomInfo PersonId or full name (first name + last name). If one or more such record is found, the oldest found records is enriched based on the procedure set in the “Overwrite existing data with data from ZoomInfo” (“MrktOverwriteWithDataFromZoomInfo code”) system setting. Otherwise, Creatio adds a new record and populates it using ZoomInfo data.