

Install ZoomInfo SalesOS connector for Creatio

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

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.

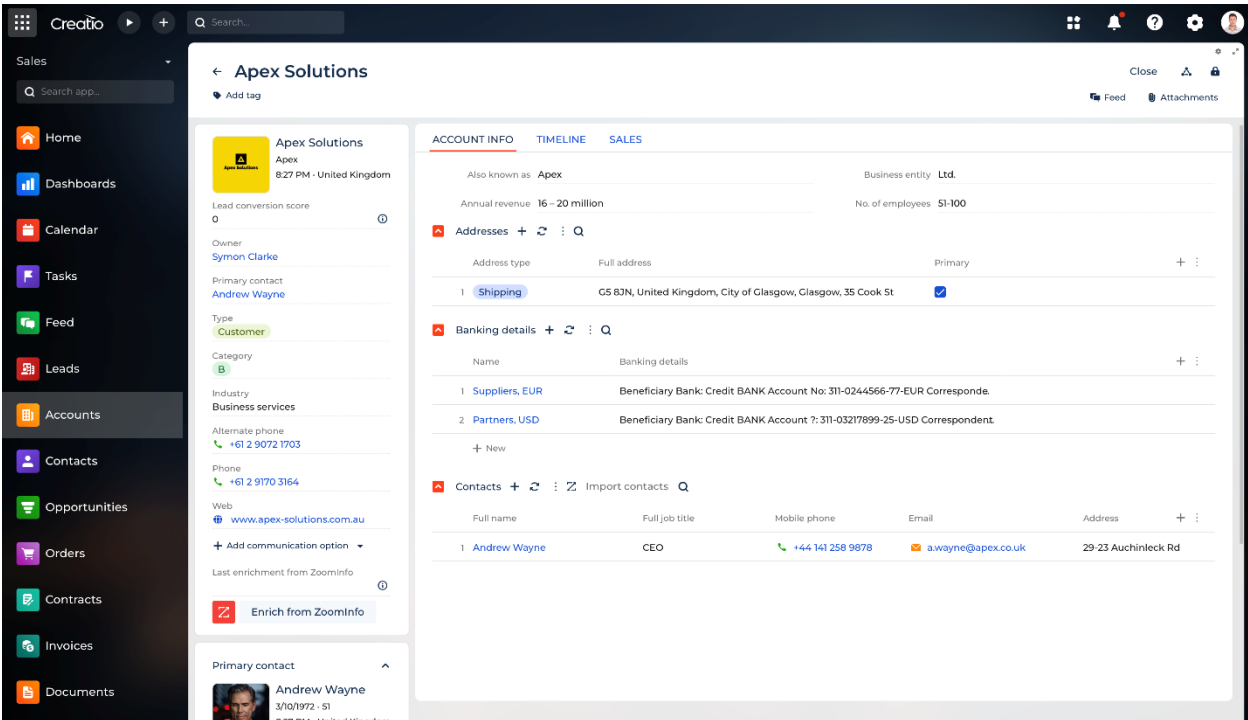
Account enrichment

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 details are as follows:

- Account Info:** Apex Solutions, Apex, 8:27 PM - United Kingdom. Business entity: Ltd. Annual revenue: 16 - 20 million. No. of employees: 51-100.
- Addresses:** One address listed: Shipping, G5 8JN, United Kingdom, City of Glasgow, Glasgow, 35 Cook St. Marked as Primary.
- Banking details:** Two entries: 1. Suppliers, EUR (Beneficiary Bank: Credit BANK Account No: 311-0244566-77-EUR Correspondent). 2. Partners, USD (Beneficiary Bank: Credit BANK Account #: 311-03217899-25-USD Correspondent).
- Contacts:** One contact listed: Andrew Wayne, CEO, Mobile phone: +44 141 258 9878, Email: a.wayne@apex.co.uk, Address: 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"/>
2		

+ New

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

Do you wish to continue?

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

No Yes

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.”

The screenshot shows the Creatio interface for a contact record. The contact is Alexander Wilson, with account Alpha Business. The left sidebar contains a navigation menu with options like Home, Contacts, Calendar, Tasks, Accounts, Cases, Services, Service agreements, Knowledge base, Queues, Queues settings, Landing pages and web forms, and Feed. The main content area shows the contact details, including a profile picture, name, and various contact information fields. A button labeled "Enrich from ZoomInfo" is located in the left sidebar, below the "Add communication option" button.

The screenshot shows the same contact record as above, but with a confirmation dialog box overlaid in the center. The dialog box contains the text: "Do you wish to continue? We're about to enrich the contact with data from ZoomInfo. Do you want to proceed?" Below the text are two buttons: "No" and "Yes". The "Yes" button is highlighted in blue.

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.

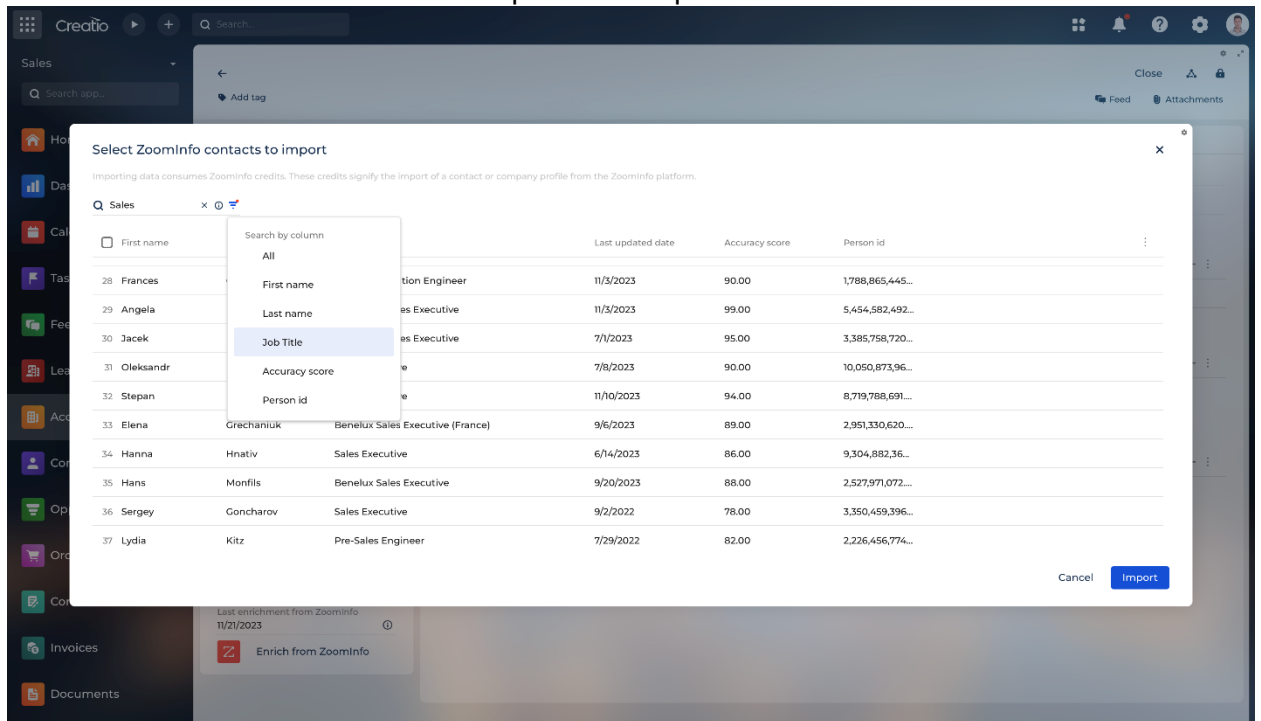
The app searches for matching contacts by ZoomInfoPersonId (contact ID from ZoomInfo). If ZoomInfoPersonId is not populated, the following rules are used, from higher to lower priority:

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.