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.

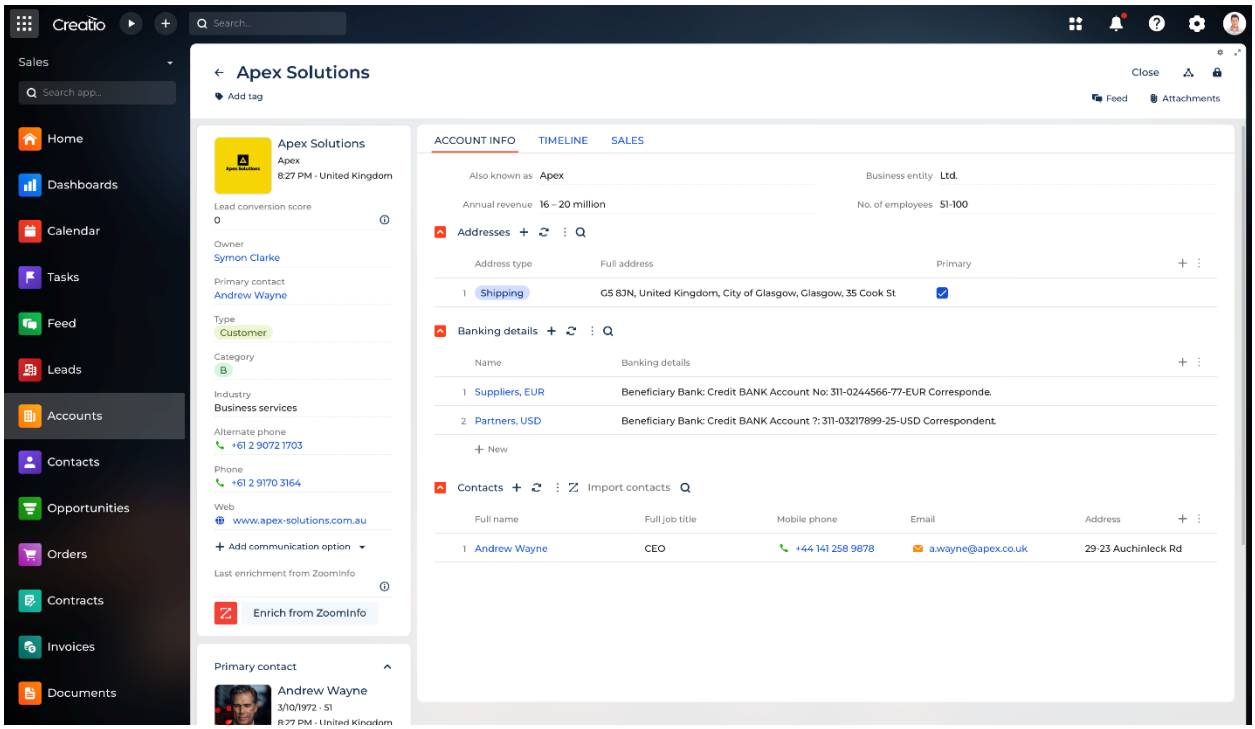
Account enrichment

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.

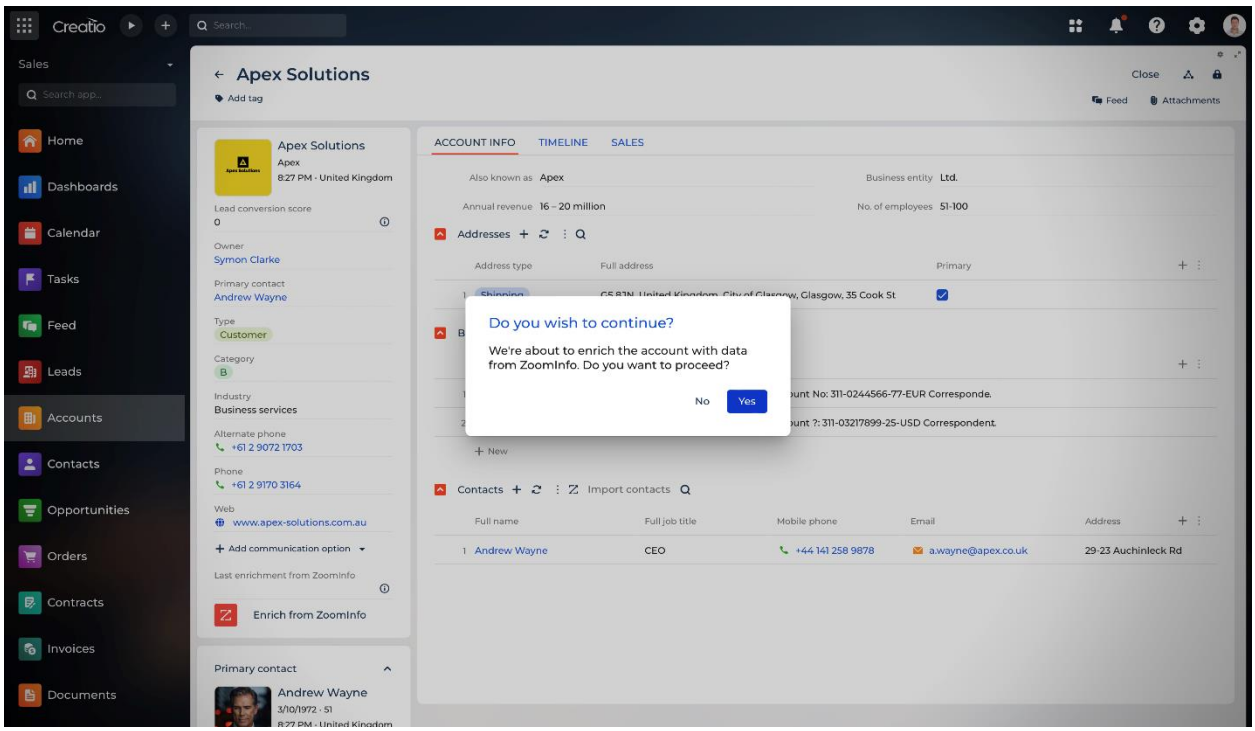
1. **Open** the **Accounts** section.
2. Select an account that has the “Web” or “Last enrichment from ZoomInfo” fields populated.

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



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.

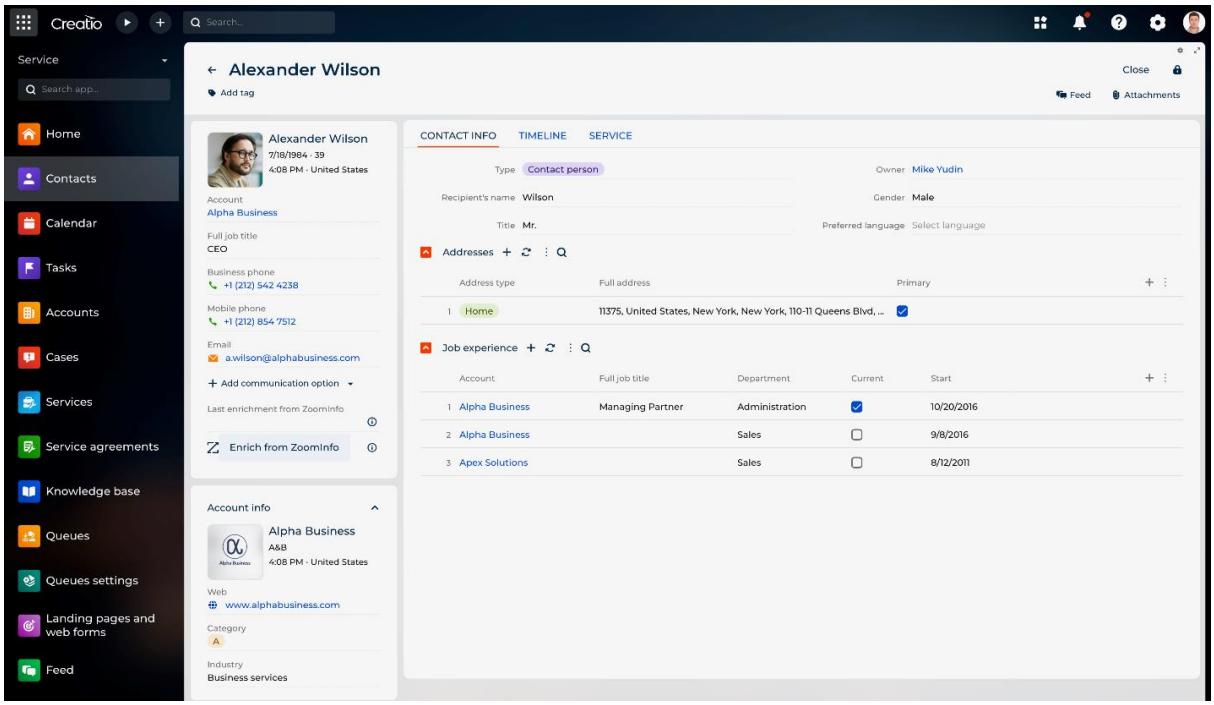

Creatio
Search...
Sales
Search app...
Home
Dashboards
Calendar
Tasks
Feed
Leads
Accounts
Contacts
Opportunities
Orders
Contracts
Invoices
Documents
Apex Solutions
Add tag
Close
Feed
Attachments
Apex Solutions
Apex
8:27 PM · United Kingdom
Lead conversion score
0
Owner
Symon Clarke
Primary contact
Andrew 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
Shipping
G5 8JN, United Kingdom, City of Glasgow, Glasgow, 35 Cook St
Do you wish to continue?
We're about to enrich the account with data from ZoomInfo. Do you want to proceed?
No
Yes
unt No: 311-0244566-77-EUR Corresponde.
unt ?: 311-03217899-25-USD Correspondent.
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

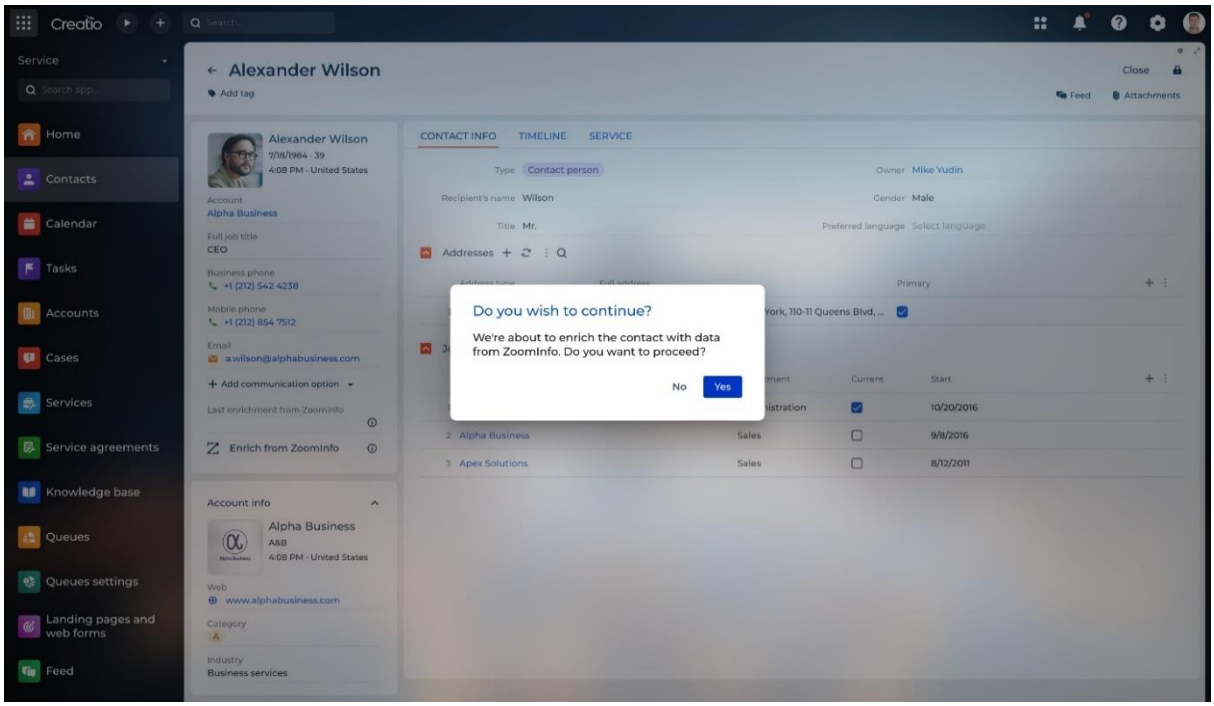
Contact enrichment

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.

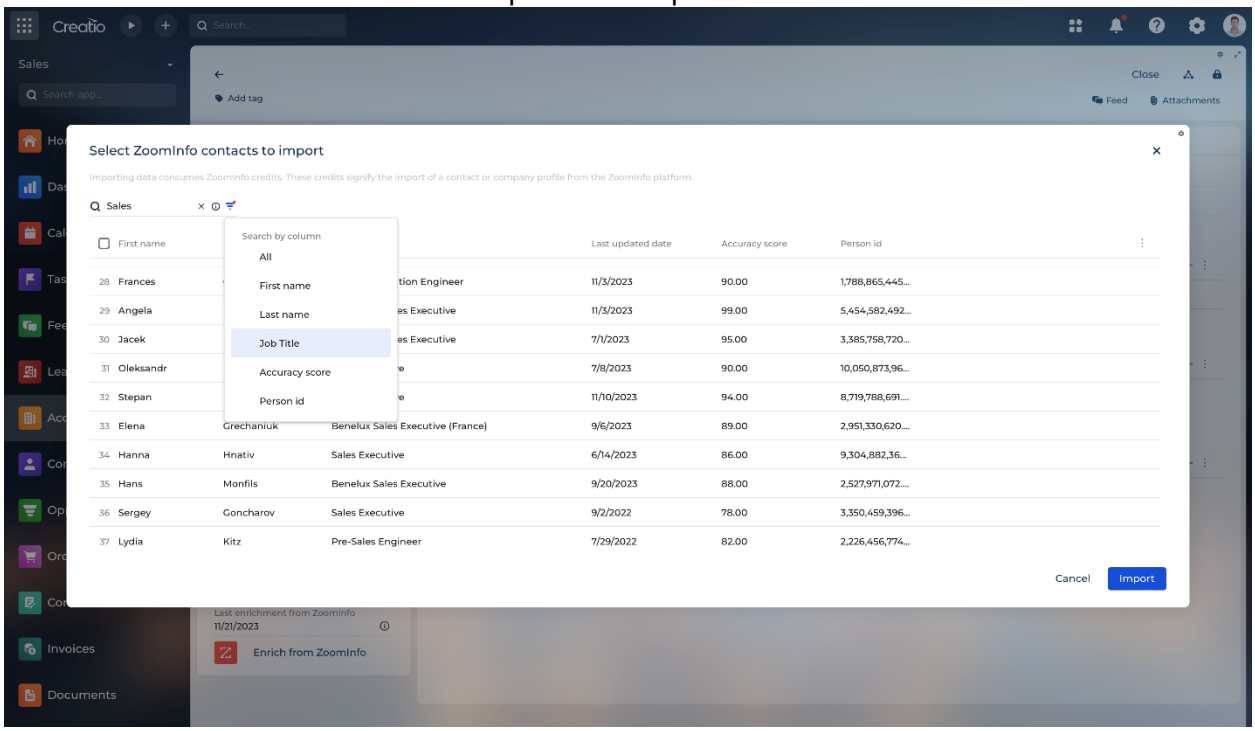
The app searches for matching contacts by ZoomInfoPersonId (contact ID from ZoomInfo). If ZoomInfoPersonId is not populated, the following rules are used, from higher to lower priority:

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.