

Implementation Guide

ZoomInfo Engage

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Overview

ZoomInfo Engage is a sales engagement platform designed to help maximize your sales teams' productivity, increase effective communications, and streamline your tech stack so your team can close more deals. Engage is a one-stop experience that combines data insights and intelligence, communications, and CRM tracking all in one convenient location.

Intended audience

This guide is intended for Engage administrators tasked with setting up Engage and associated integrations for themselves and users in their organization. Included in this document are details to provide to users to enable them to successfully connect and use Engage.

Getting started

Getting started with Engage includes the following steps:

1. **[Welcome to Engage](#)**: An administrator in your organization is designated as the “first one in”, establishing their own connection to Engage. This admin provides their contact details, credentials to connect a supported cloud-based email server, ZoomInfo, and CRM (if used).
2. **[Configure the ZoomInfo to Engage connection](#)**: The designated admin logs in to ZoomInfo and completes the connection from ZoomInfo to Engage. This includes enabling the connection for other users in their organization.
3. **[Add users in Engage](#)**: The admin adds users to their Engage instance, designating them as either Administrators or Contributors. As each user is added, they are invited by email to log in to Engage, establish a password, and walk through the setup wizard to provide account profile details, dialer setup, email server integration, and CRM integration (if used).
4. **[Instruct users to connect ZoomInfo to Engage](#)**: An Engage admin instructs users to connect individually with the Engage integration from ZoomInfo.
5. **[Instruct users to configure Engage account settings](#)**: From Engage, each user can check and update the details they provided (or skipped) when they ran the setup wizard. Users can update their account profile and settings, dialer setup, email server integration and CRM integration. Users can also install the Engage Chrome extension.

Welcome to Engage

A designated Engage administrator will receive a welcome email with a link to get started with creating the initial connection with Engage for their organization.

1. From the welcome email, click **Open the app**.
2. Follow the onboarding wizard, providing the following details:

Contact Details	Name, phone number, job title and company.
Email Integration Setup	Connect to a supported cloud-based email server (Google or Microsoft Office 365) and configure email alert frequency settings.
Integration Setup	ZoomInfo: Connect to ZoomInfo using your ZoomInfo credentials. Salesforce: If your organization uses Salesforce, connect to Salesforce using your Salesforce credentials. For details about the Salesforce integration, see Engage Salesforce integration .
Email Signature	Choose a predefined email signature template, create your own signature, or configure it later.
Dialer Setup	If using the dialer, provide your phone number and verify it.
Verify & Set Timezone	Set your timezone and language.

Note: When running the wizard, you can choose to skip providing details that are not required and configure them [later in your Engage account settings](#).

3. Click **Let's Go** to do a quick virtual tour of Engage, or **Explore Later** to access Engage directly.

Configure the ZoomInfo to Engage connection

As the first admin to successfully log in to Engage, you can now navigate to ZoomInfo to:

1. Connect ZoomInfo to Engage.
2. Configure any desired custom mapping between ZoomInfo fields and Engage fields.
3. Review data-sharing and privacy settings.
4. Enable users to connect to Engage from ZoomInfo.

Connect ZoomInfo to Engage

To establish the integration with Engage:

1. Navigate to <https://app.zoominfo.com/> and log in using your credentials.
2. Click the **Admin Portal** tab.
3. Select **Integrations**.
4. Under the Engage integration tile, click **Connect**.
5. Review the data validation pop-up and click **Confirm**. For details about data-sharing and privacy configuration see [Privacy Center \(admins only\)](#).

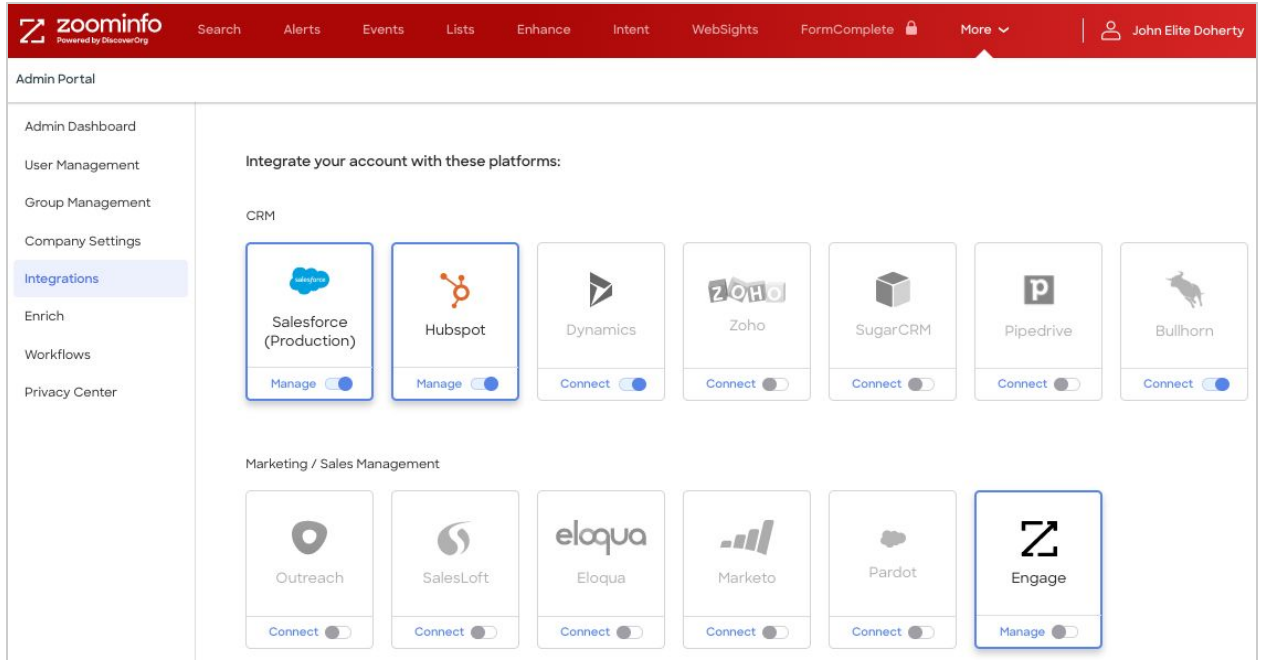
Important: You can enable exports using default mapping settings for all users using the toggle switch to the right of the **Manage** link. However, as a best practice, you should configure custom mapping settings first.

Configure custom mapping

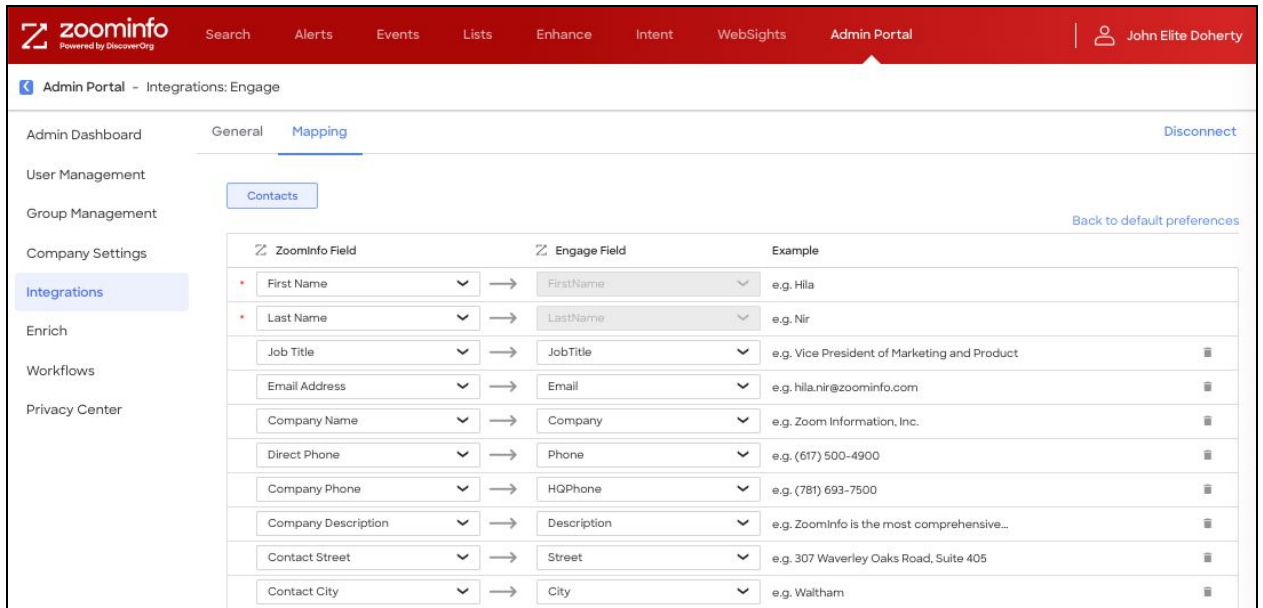
Review and configure any desired custom mapping of ZoomInfo fields to Engage fields:

1. Click the **Admin Portal** tab.
2. Select **Integrations**.

3. Under the Engage integration tile, click **Manage**.



4. Click the **Mapping** tab.



Under this tab, you can review the default mappings and make any mapping changes.

Update options: For each field, you can select one of the following update options:

- Complete if missing (default) - only complete with ZoomInfo data if nothing exists in Engage.
- Overwrite field - overwrites existing data in Engage with ZoomInfo data.

Required fields: Required fields within Engage are marked with a red asterisk.

Engage values: All values listed under the Engage Field column are retrieved directly from your Engage instance.

Adding and removing fields: Add fields by clicking **Add Row** at the bottom of the page. Click the trash icon to remove any fields that you do not want sent from ZoomInfo to Engage.

Setting a hierarchy for ZoomInfo data within a single Engage field: In some cases, you may want multiple ZoomInfo fields to be stacked hierarchically within a single Engage field. For example, you want to import the ZoomInfo Direct Phone and Company Phone fields into the Engage Business Phone field.

Direct Phone	▼	→	1 Business Phone	▼	e.g. (617) 500-4900
Company Phone	▼	→	2 Business Phone	▼	e.g. (781) 693-7500

In this example:

- When users are exported to Engage, the Direct Phone will map to the Business Phone.
 - If a contact has both a Direct Phone and Company Phone in ZoomInfo, the first occurrence of the Engage field will be denoted with number 1, and the second will be number 2.
 - If a specific contact does not have a Direct Phone in ZoomInfo, we will send the Company Phone field to the Business Phone field in Engage.
5. After configuring mappings for each object type, click **Verify and Save** at the bottom of the mapping page. Verification requires that all ZoomInfo fields are mapped to a corresponding Engage field.
- If mappings are correctly configured, a success notification displays.



- If the mappings are not set correctly, an error notification displays to note the specific field(s) to adjust. If you have secondary required fields

set up for a specific Engage field you will not be able to map to that field.

Add Row

Verify and Save

Mapping verification failed.
MALFORMED_ID Parent Account ID: id value of incorrect type

Review privacy settings

The Privacy Center 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/or to make recommendations to you.

1. Go to **Admin Portal > Privacy Center**.

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

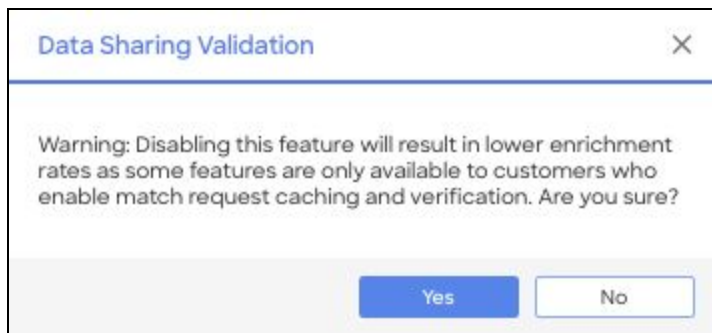
Privacy Center has been disabled due to contractual terms. Please contact your Account Manager for assistance

- If your organization has not opted out of data sharing, the Privacy Center page displays.

The screenshot shows the ZoomInfo Admin Portal interface. The top navigation bar includes 'Search', 'Alerts', 'Events', 'Lists', 'Enhance', 'Intent', 'WebSights', 'FormComplete', and 'Admin Portal'. The user 'Andrew McCott' is logged in. The left sidebar lists navigation options: Admin Dashboard, User Management, Group Management, Company Settings, Integrations, Enrich, API, and Privacy Center (highlighted). The main content area is titled 'The privacy settings for each activated integration are listed below. Please review and manage these settings according to your organization's privacy preferences:'. It contains three sections:

- Analyze Usage:** If set to 'On', we may analyze your usage of connected integrations in our application to improve our service and/or to make recommendations to you. Integrations shown: Salesforce (Production), Hubspot, Dynamics, Outreach. All are 'On'.
- Verify Non-Matching Data:** If set to 'On', when you sync contacts with our database or push contacts for matching or cleansing, in addition to returning updated information on matches, we will attempt to verify non-matching data. If we are able to confirm any non-matching data through our research process, the resulting data may be added to our database, and you will be able to match against that data in the future, including receiving updates. If it is set to 'Off', non-matching data will be ignored. Integrations shown: Salesforce (Production), Hubspot, Dynamics, Outreach. All are 'On'. A link 'Show geographic preferences' is present.
- Analyze Opportunities:** If set to 'On', we may analyze information in your connected CRM instance solely for the purpose of making recommendations to you about good fit prospects or contacts. Integrations shown: Salesforce (Production), Hubspot, Dynamics, Zoho. All are 'On'.

3. Review the details.
 - All activated integrations will display in the **Analyze Usage** and **Verify Non-Matching Data** sections.
 - Only activated CRMs will display in the **Analyze Opportunities** section.
 - You can toggle any integration **On** or **Off**.
4. If you toggle any integration in the **Verify Non-Matching Data** section to **Off**, the following message displays.



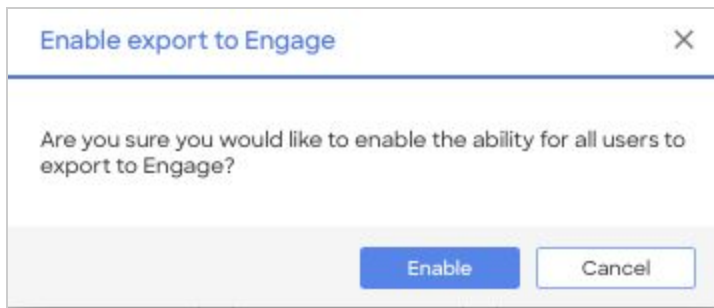
5. Review the message and click **Yes** to confirm, or **No** to cancel the action.
6. Over time, Admins can review the **Data Contributions** tab to monitor the contributions made by their organization and understand the value of their participation in the Contributory Network.

Enable users to connect to Engage from ZoomInfo

Once you have enabled the Engage integration as an admin, you can turn on the integration for users in your organization.

Note: You will add these users within Engage later in the process. Once they have successfully logged in to Engage, you will direct them back to ZoomInfo to enable their individual ZoomInfo to Engage connection.

1. Click the **Admin Portal** tab.
2. Select **Integrations**.
3. Under the Engage integration tile, click the toggle switch to the right of the **Manage** link to allow individual ZoomInfo users in your organization to export to Engage. The following message displays:



4. Click **Enable**.



The integration is now enabled for your individual users. Once these users (including other admins in your organization) have successfully been added and logged in to Engage, they can enable exports from ZoomInfo to Engage.

Add new users in Engage

Add your organization's users as either Administrators or Contributors in Engage. Each user that you add will receive an email inviting them to connect to Engage.

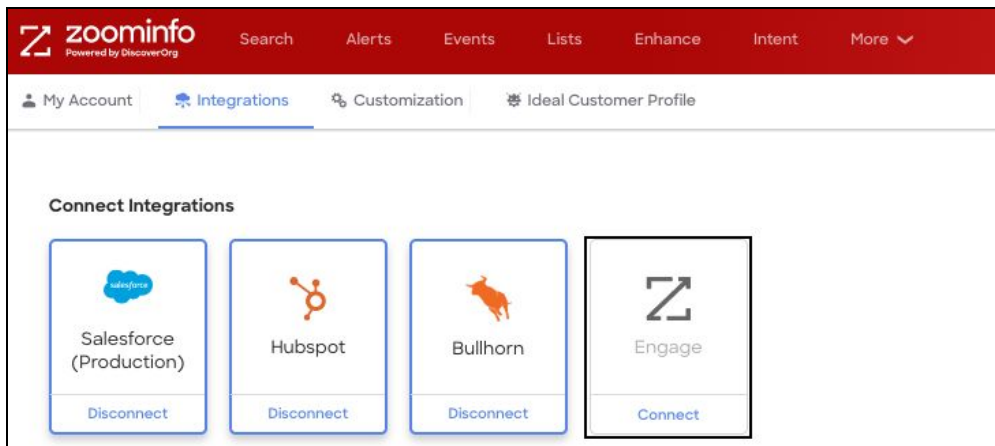
1. Navigate to <https://engage-app.zoominfo.com> and log in using your admin credentials.
2. Click your user name in the top right corner and select **Admin**.
3. Click the **User Management** tab.
4. Click **Add User**.

1. Select a **Role** (Administrator or Contributor).
2. Type the user's **Email** and **Name**.
3. Click **Add**. An email invitation is sent to the user with a link to log in to Engage and establish a password.

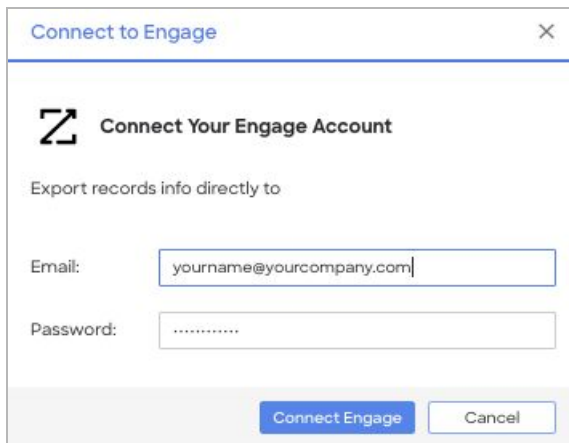
Instruct users to connect ZoomInfo to Engage

Each user in your organization who has successfully logged in to Engage can now enable exports from ZoomInfo to Engage. Instruct your users to:

1. Navigate to <https://app.zoominfo.com/> and log in using your credentials.
2. Click your name at the top right and select **Settings** from the drop-down menu.
3. Click the **Integrations** tab and select **Connect** under the Engage tile.



4. Review the data sharing validation pop-up and click **Confirm**.
5. Sign in with your Engage credentials.



Connect to Engage

Z Connect Your Engage Account

Export records info directly to

Email:

Password:

Note: The Engage login window is a pop-up. If the login window does not display, ensure that you have pop-up blockers disabled on your current tab.

6. A success notification displays. You are now connected and can now automate data entry from ZoomInfo to Engage.

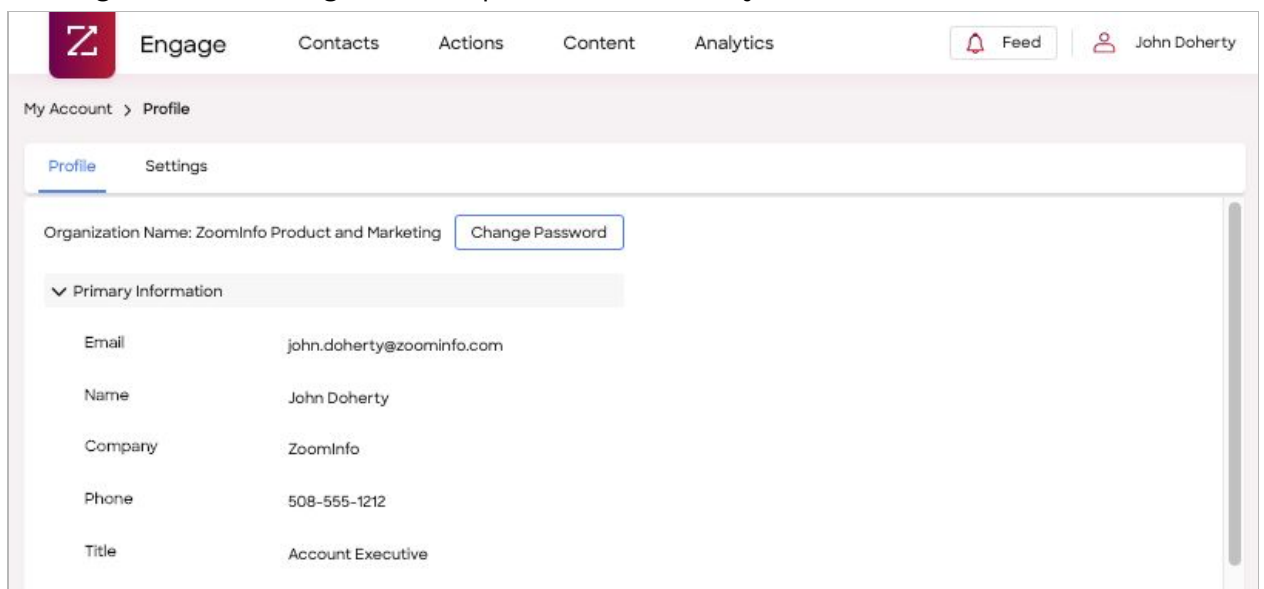
Instruct users to configure Engage account settings

Assuming the user has successfully logged in to Engage, instruct them to review and configure their profile information and settings.

Note: Settings that each user configured (or skipped) when they ran the setup wizard are reflected here.

Profile tab

1. Click your name and select **Account**. The Profile page displays.
2. Review the Primary Information section which reflects what you provided when running the onboarding wizard. Update as necessary.



3. Add an Email Signature using the options presented.

The screenshot shows the Zoom Engage user interface. At the top, there is a navigation bar with the Zoom logo, the word 'Engage', and menu items for 'Contacts', 'Actions', 'Content', and 'Analytics'. On the right side of the navigation bar, there is a 'Feed' button with a bell icon and a user profile icon for 'John Doherty'. Below the navigation bar, the breadcrumb 'My Account > Profile' is visible. The main content area has two tabs: 'Profile' (selected) and 'Settings'. Under the 'Settings' tab, the 'Email Signature' section is expanded, showing a 'Save' button and a 'Cancel' button. The 'Select Template' radio button is selected. There are three options for email signatures: 'Template 1', 'Template 2', and 'Create New Signature'. 'Template 1' and 'Template 2' both show a preview of an email signature for John Doherty, Account Executive at ZoomInfo, with phone number 508-555-1212 and email john.doherty@zoominfo.com. 'Template 1' includes a blue link for the email address. 'Template 2' includes a blue link for the name. Below these templates is the 'Create New Signature' option, which features a red pencil icon and the text 'Add Signature'. At the bottom of the section, the 'No Signature' radio button is unselected.

4. Provide Address information by clicking **Edit**.


The screenshot shows the Engage user interface. At the top, there is a navigation bar with the Engage logo and menu items: Contacts, Actions, Content, and Analytics. On the right side of the navigation bar, there is a 'Feed' button with a bell icon and a user profile icon for 'John Doherty'. Below the navigation bar, the breadcrumb 'My Account > Profile' is visible. The main content area has two tabs: 'Profile' (selected) and 'Settings'. Under the 'Profile' tab, there is a section titled 'Address' with a dropdown arrow on the left and an 'Edit' button on the right. Below this section, there are five rows of address fields, each with a label and a hyphen placeholder: Street, City, Province/State, Postal/Zip, and Country.

5. Review Time Zone & Business Hours details and make any changes by clicking **Edit**.

The screenshot shows the 'Time Zone & Business Hours' settings page. At the top, there is a section header 'Time Zone & Business Hours' with a dropdown arrow on the left and an 'Edit' button on the right. Below this header, there are four main sections: 'Timezone', 'Culture', 'Salesflow Business Hours:', and 'Excluded Holidays Include:'. The 'Culture' section shows 'English, United States'. The 'Salesflow Business Hours:' section shows 'Monday | Tuesday | Wednesday | Thursday | Friday 8AM - 6PM'. The 'Excluded Holidays Include:' section lists several holidays with their dates: New Year, Wednesday, 1/1/2020; Birthday of Martin Luther King, Jr., Monday, 1/20/2020; Washington's Birthday, Monday, 2/17/2020; Memorial Day, Monday, 5/25/2020; Independence Day, Saturday, 7/4/2020; Labor Day, Monday, 9/7/2020; Columbus Day, Monday, 10/12/2020; Veterans Day, Wednesday, 11/11/2020; Thanksgiving Day, Thursday, 11/26/2020; and Christmas, Friday, 12/25/2020.

Settings tab

1. Click the **Settings** tab.
2. In the Dialer Settings section, click **Verify** and type your phone number and extension (if any).



The image shows a 'Verify Phone' dialog box with a close button (X) in the top right corner. Below the title bar, the text 'Verify your phone number' is displayed. There are two input fields: 'Phone*' and 'Extension'. The 'Phone*' field contains a dropdown menu with a US flag icon and the number '(201) 555-0123'. The 'Extension' field is empty. At the bottom right, there are two buttons: 'Continue' (disabled) and 'Cancel' (active).

Answer your phone and enter the verification code provided. You are now verified.

3. Click **Add a Voicemail** to record a voicemail message that Engage can leave for you. You can record up to 20 unique voicemail messages.
4. In the Email Notifications section, select the notification options.



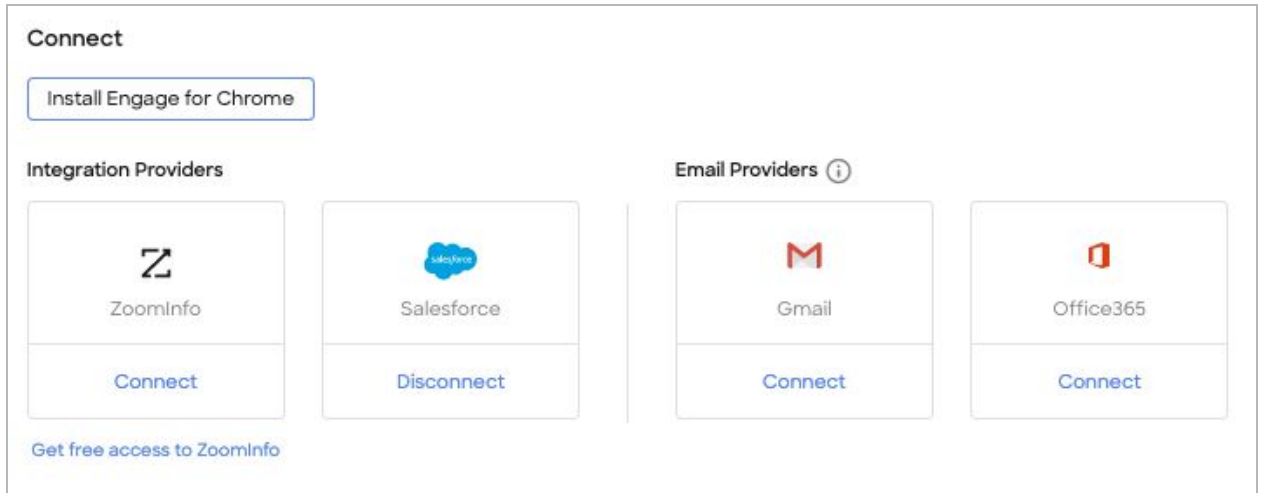
The image shows the 'Email Notifications' settings section. It contains three rows, each with a notification type on the left and a dropdown menu on the right. All three dropdown menus are currently set to 'Immediately'.

Notification Type	Notification Option
Email opened	Immediately
Email failed delivery	Immediately
Hyperlink clicked	Immediately

You can choose **Immediately** or **Never** for each of the following notifications:

- Email opened
- Email failed delivery
- Hyperlink clicked

5. In the Connect section, review your connection information.



Depending on the status of each connection, you can:

- Click **Install Engage for Chrome** to access the Google Chrome Web Store and install the ZoomInfo Engage Chrome Extension that enables you to view contacts lists, click to dial or email, see engagement history, and pull contacts from ZoomInfo or any Salesforce page.
- Under Integration Providers, click **Connect** to authenticate and connect to ZoomInfo and Salesforce (if used).
- Under Email Providers, ensure you are connected to one of the supported cloud email servers.

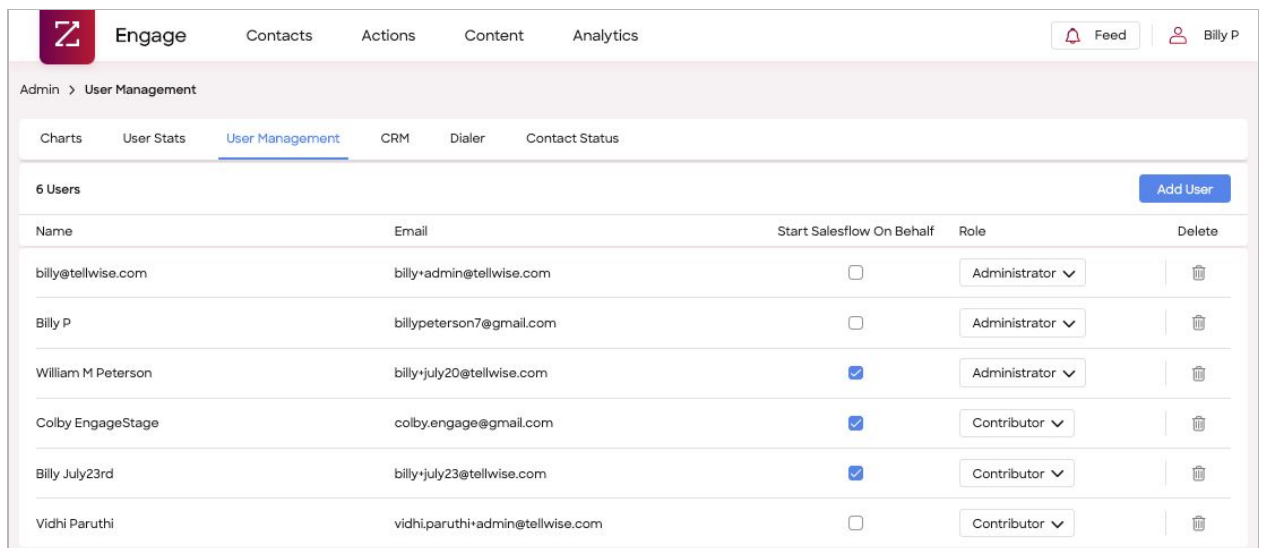
Engage administration

User Management tab

As an Engage admin, you use the User Management tab to manage users, configure user roles, and enable Salesflows to be sent on behalf of users.

1. Click your user name in the top right corner and select **Admin**.
2. Click the **User Management** tab.

Admins can add users, change their roles, and remove them from the User Management tab.



The screenshot shows the Engage User Management interface. At the top, there is a navigation bar with the Engage logo and tabs for Contacts, Actions, Content, and Analytics. A user profile for Billy P is visible in the top right corner. Below the navigation bar, the breadcrumb path is 'Admin > User Management'. The main content area has tabs for Charts, User Stats, User Management (selected), CRM, Dialer, and Contact Status. A blue 'Add User' button is located in the top right of the user list. The user list table has the following data:

Name	Email	Start Salesflow On Behalf	Role	Delete
billy@tellwise.com	billy+admin@tellwise.com	<input type="checkbox"/>	Administrator	
Billy P	bilypeterson7@gmail.com	<input type="checkbox"/>	Administrator	
William M Peterson	billy+july20@tellwise.com	<input checked="" type="checkbox"/>	Administrator	
Colby EngageStage	colby.engage@gmail.com	<input checked="" type="checkbox"/>	Contributor	
Billy July23rd	billy+july23@tellwise.com	<input checked="" type="checkbox"/>	Contributor	
Vidhi Paruthi	vidhi.paruthi+admin@tellwise.com	<input type="checkbox"/>	Contributor	

Admins can also enable specific users to be able to add contacts into Salesflows on behalf of *all* other users by selecting the **Start Salesflow On Behalf** checkbox. You can configure this ability regardless of the user's role (**Administrator** or **Contributor**). With this option enabled, users will see an

additional **Start on behalf of** field on the Add to Salesflow page.

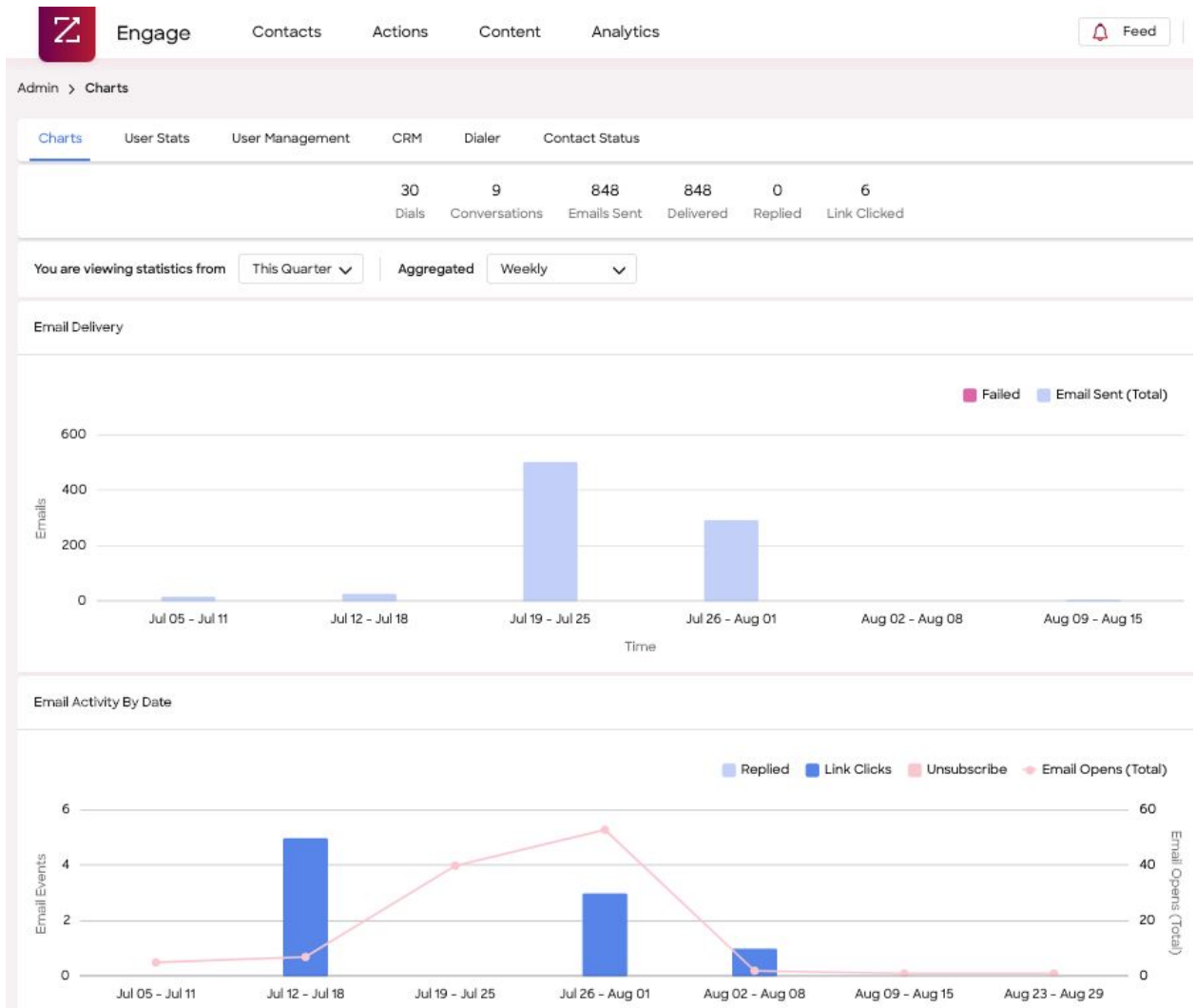
The screenshot shows a dialog box titled "Add to Salesflow". It features a close button (X) in the top right corner. The dialog is divided into three main sections: "Start on behalf of" with a dropdown menu showing "john.doherty@zoominfo.com"; "Contacts" with a text input field containing "daniel.sellars@zoominfo.com"; and "Select Salesflow" with a dropdown menu showing "Enter Salesflow Name" and two user icons. Below these sections is a greyed-out area with the text "Set specific start time for this Salesflow". At the bottom right are "Start" and "Cancel" buttons.

Charts tab

The Charts tab shows statistical data about email and phone activity for users in your organization.


1. Go to **Admin > Charts**.

2. Select a timeframe and aggregation criteria.



3. Review the data provided in the following sections:

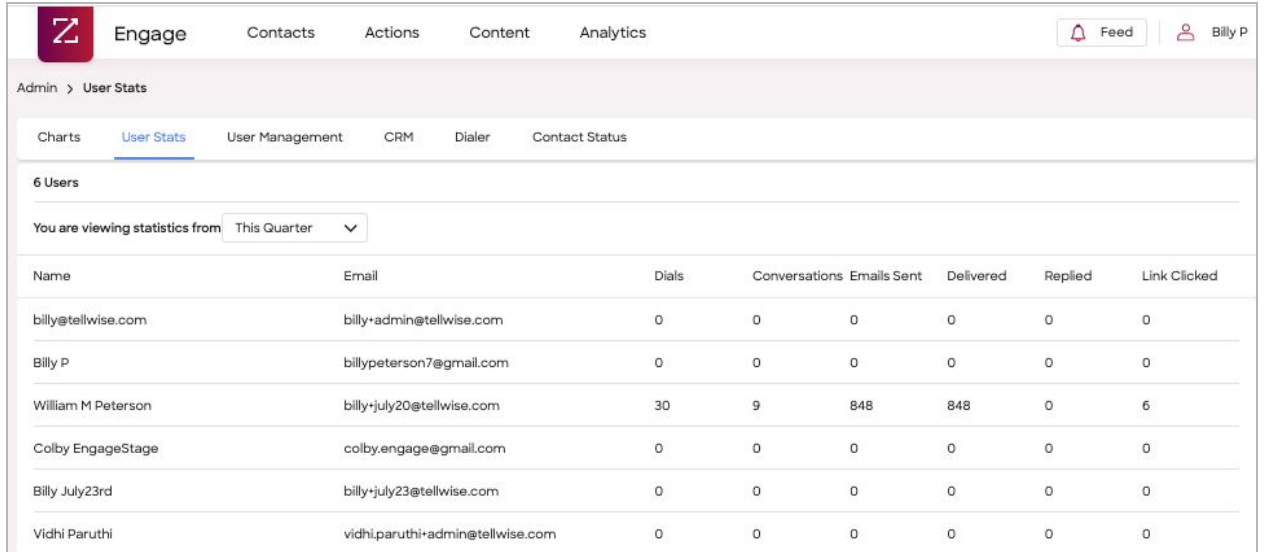
- Email Delivery
- Email Activity By Date
- Email Activity By Time Of Day
- Phone Calls By Date
- Phone Calls By Time of Day
- Phone Calls Results
- Conversation Sentiments

Note: You can hover over the  icon to see a description of the information contained in each section.

User Stats tab

You can also dig a bit deeper to see per user statistics:

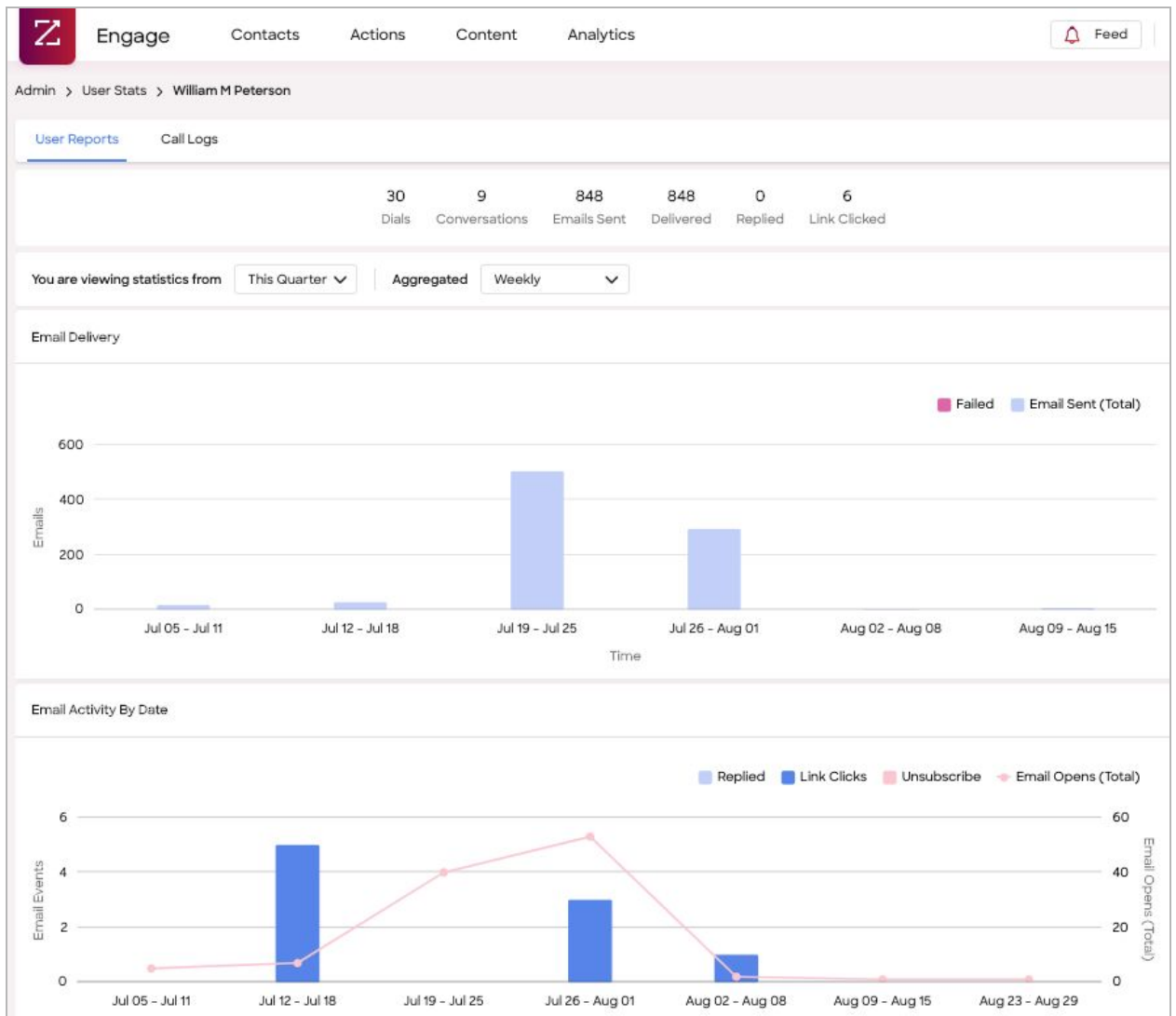
1. Click **Admin > User Stats**.



The screenshot shows the Engage dashboard with the 'User Stats' tab selected. The page displays a table of user statistics for 6 users. The table columns are Name, Email, Dials, Conversations, Emails Sent, Delivered, Replied, and Link Clicked. The data is as follows:

Name	Email	Dials	Conversations	Emails Sent	Delivered	Replied	Link Clicked
billy@tellwise.com	billy+admin@tellwise.com	0	0	0	0	0	0
Billy P	bilypeterson7@gmail.com	0	0	0	0	0	0
William M Peterson	billy+july20@tellwise.com	30	9	848	848	0	6
Colby EngageStage	colby.engage@gmail.com	0	0	0	0	0	0
Billy July23rd	billy+july23@tellwise.com	0	0	0	0	0	0
Vidhi Paruthi	vidhi.paruthi+admin@tellwise.com	0	0	0	0	0	0

2. Click the name of a user. The User Reports tab displays.



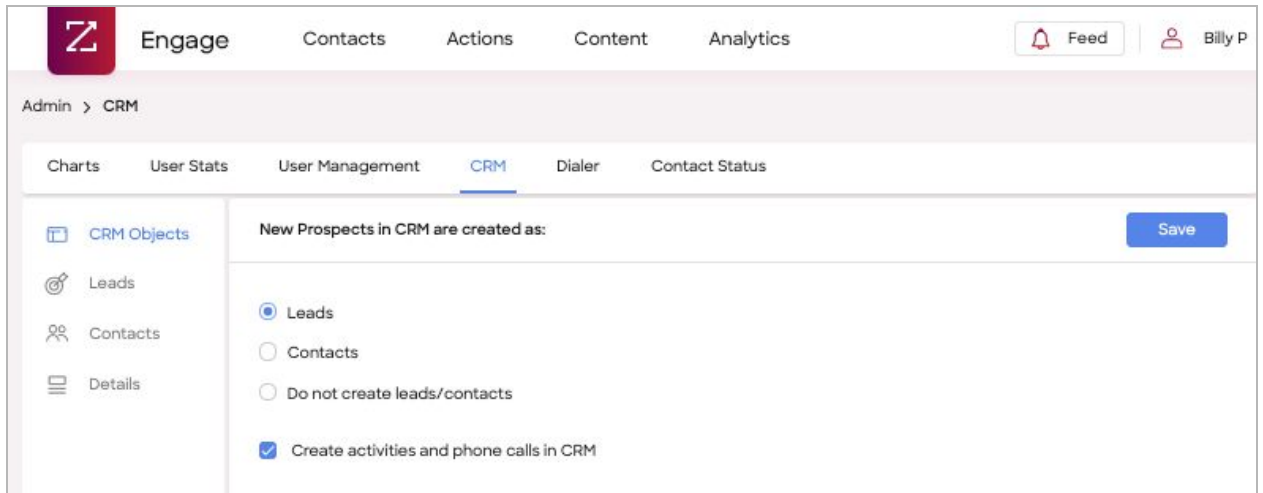
4. Select a timeframe and aggregation criteria.

5. To review call logs (up to 30 days), click the **Call Logs** tab.

CRM tab

Admins can determine how new prospects in your CRM are created in Engage.

1. Click **Admin > CRM**.



The screenshot shows the Engage CRM Admin interface. The top navigation bar includes the Engage logo, 'Engage', 'Contacts', 'Actions', 'Content', and 'Analytics'. A 'Feed' notification bell and a user profile for 'Billy P' are on the right. Below the navigation bar, the breadcrumb 'Admin > CRM' is visible. A secondary navigation bar contains 'Charts', 'User Stats', 'User Management', 'CRM' (highlighted), 'Dialer', and 'Contact Status'. On the left, a sidebar menu lists 'CRM Objects', 'Leads', 'Contacts', and 'Details'. The main content area is titled 'New Prospects in CRM are created as:' and features three radio button options: 'Leads' (selected), 'Contacts', and 'Do not create leads/contacts'. Below these is a checked checkbox for 'Create activities and phone calls in CRM'. A blue 'Save' button is located in the top right corner of the main content area.

2. Select one of the following options:
 - **Leads** (default)
 - **Contacts**
 - **Do not create leads/contacts**
3. The **Create activities and phone calls in CRM** checkbox is selected by default. This option controls whether Engage syncs call and email activity to the Lead or Contact activity history in your CRM.

- Click **Leads** or **Contacts** to configure the mapping between your Engage fields and your CRM fields.

The screenshot shows the Engage CRM configuration page for mapping Engage fields to CRM fields. The page is titled "Admin > CRM" and has a navigation bar with "Charts", "User Stats", "User Management", "CRM", "Dialer", and "Contact Status". The "CRM" tab is selected. On the left, there is a sidebar with "CRM Objects", "Leads", "Contacts", and "Details". The main content area is titled "Describe how Engage should interpret lead fields as defined by your CRM." and has a "Save" button. Below this is a table with three columns: "Engage Field", "CRM Field", and "Default Value".

Engage Field	CRM Field	Default Value
Last Name	Last Name	
First Name	First Name	
Salutation	Salutation	
Job Title	Title	
Company	Company	
Street	Street	
City	City	
State	State/Province	
Zip	Zip/Postal Code	

Using this mapping:

- Contact information is retrieved from the CRM in real time to populate Engage contact fields. The CRM remains the source of truth.
- If you've enabled new Leads or Contacts to be created in your CRM, new contacts that do not exist in your CRM will use this mapping to control which fields data is written to.

- Click **Details** to see read-only details about your CRM.

The screenshot shows the Engage CRM configuration page for read-only details about a CRM user. The page is titled "Admin > CRM" and has a navigation bar with "Charts", "User Stats", "User Management", "CRM", "Dialer", and "Contact Status". The "CRM" tab is selected. On the left, there is a sidebar with "CRM Objects", "Leads", "Contacts", and "Details". The main content area is titled "Salesforce User" and has a "Save" button. Below this is a table with four columns: "Id", "Username", "User Type", and "Name".

Id	Username	User Type	Name
0053h000002T55bAAC	billy.peterson@tellwise.com	User	William Peterson

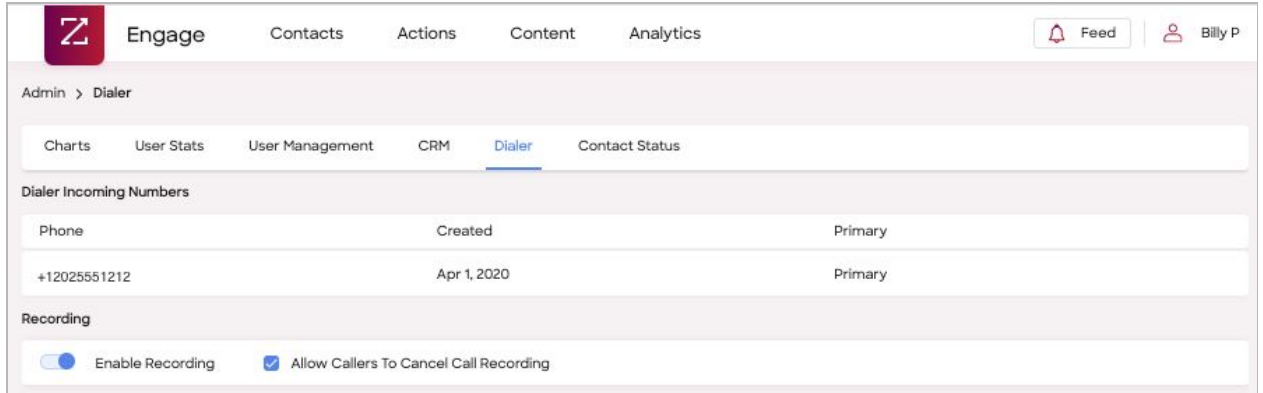
Below the table, there is a section titled "Privileges" with a table showing the user's privileges for various CRM objects.

Leads	Contacts	Activities	Phone Calls

Dialer tab

Admins can use this tab to see a list of dialer-related information.

1. Click **Admin > Dialer**.



The screenshot shows the Zoom Engage Admin interface. At the top, there is a navigation bar with the Zoom logo, 'Engage', and menu items: 'Contacts', 'Actions', 'Content', and 'Analytics'. On the right, there is a 'Feed' notification icon and a user profile for 'Billy P'. Below the navigation bar, the breadcrumb 'Admin > Dialer' is visible. A secondary navigation bar contains 'Charts', 'User Stats', 'User Management', 'CRM', 'Dialer' (which is highlighted), and 'Contact Status'. The main content area is divided into three sections: 'Dialer Incoming Numbers', 'Recording', and 'Recording' settings. The 'Dialer Incoming Numbers' section contains a table with the following data:

Phone	Created	Primary
+12025551212	Apr 1, 2020	Primary

The 'Recording' section has two settings: 'Enable Recording' (which is turned on) and 'Allow Callers To Cancel Call Recording' (which is checked).

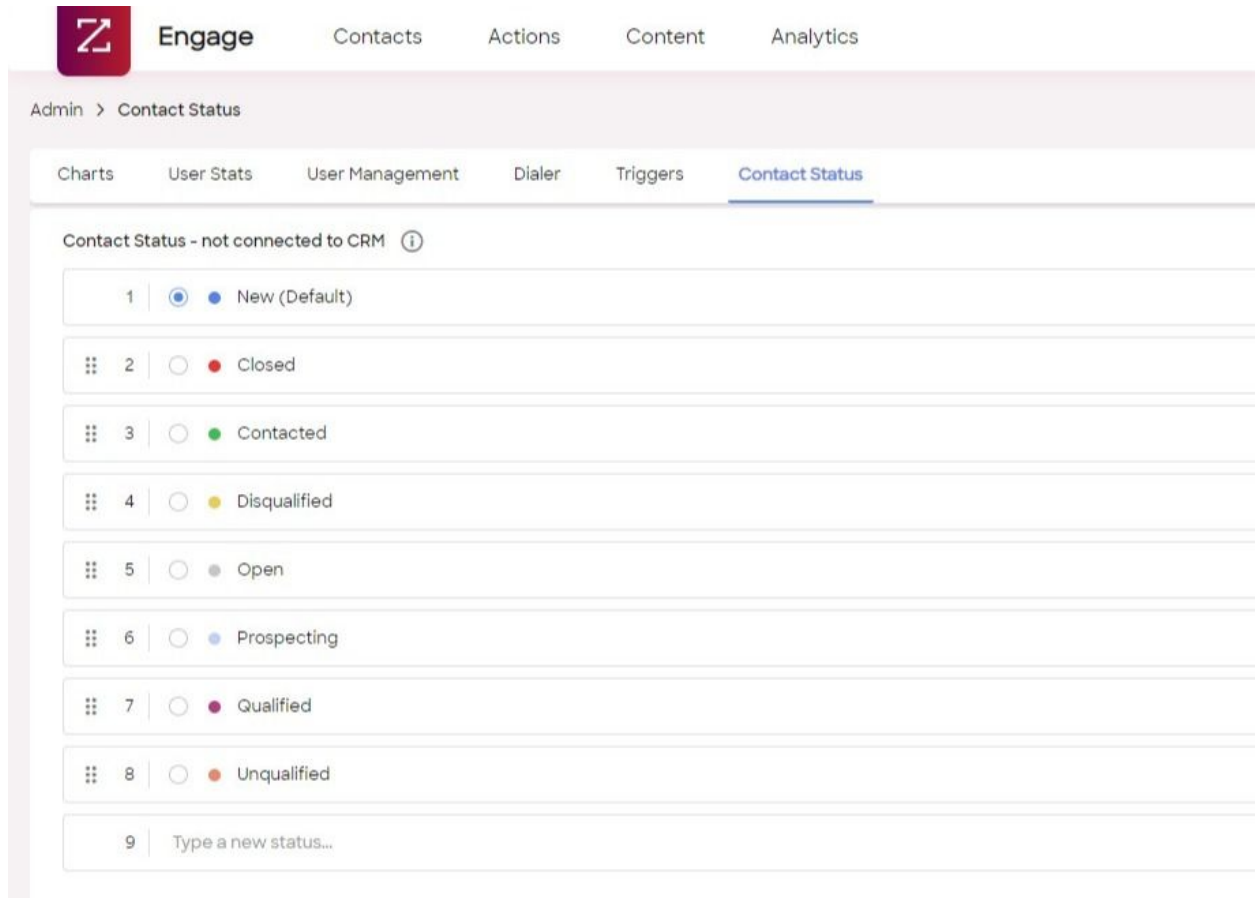
2. Review the details:
 - Dialer Incoming Numbers: Displays the phone number that the user will see calling when a dialer session is initiated.
 - Users verified phone numbers: Displays phone numbers of users who have successfully verified their phone numbers.
 - Recording: Enable or disable recording for all users and optionally allow callers to cancel call recording.

Contact Status tab

The Contact Status tab shows available statuses to help Engage users know where a contact is within the sales process.

Not connected to CRM

If you are not connected to a CRM, you can add, modify or delete status values. By default, Engage provides a standard set of status values that you can customize.



The screenshot shows the Engage user interface. At the top, there is a navigation bar with the Engage logo and menu items: Contacts, Actions, Content, and Analytics. Below this is a breadcrumb trail: Admin > Contact Status. A secondary navigation bar contains tabs for Charts, User Stats, User Management, Dialer, Triggers, and Contact Status (which is currently selected). The main content area is titled "Contact Status - not connected to CRM" with an information icon. It displays a list of nine status options, each with a number, a radio button, a colored dot, and a label:

- 1 New (Default)
- 2 Closed
- 3 Contacted
- 4 Disqualified
- 5 Open
- 6 Prospecting
- 7 Qualified
- 8 Unqualified
- 9 Type a new status...

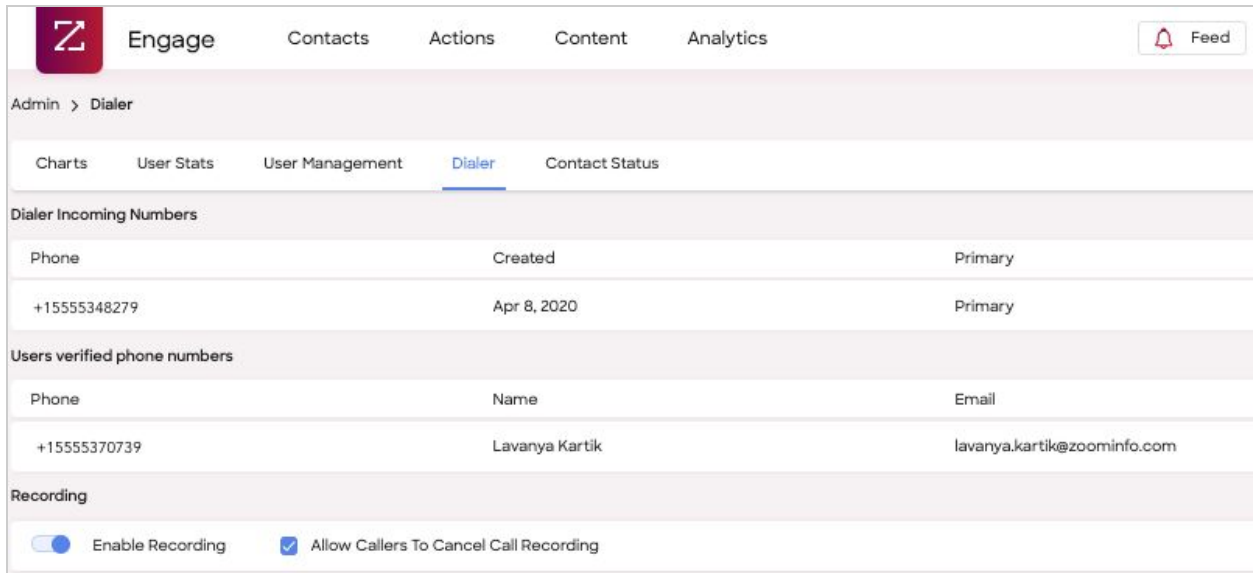
Connected to CRM

If you are connected to a CRM (and the Lead Status field is mapped), the values shown here are populated from your CRM. Any modifications to the status values must be made in your CRM, and the updated values will be reflected in Engage.

Use the dialer tab

You can view assigned numbers, user-verified phone numbers, or users that have connected to the Dialer.

1. Click **Admin > Dialer**.



The screenshot shows the Zoom Engage Admin interface. The top navigation bar includes 'Engage', 'Contacts', 'Actions', 'Content', and 'Analytics'. A 'Feed' notification icon is in the top right. Below the navigation bar, the breadcrumb 'Admin > Dialer' is visible. The main content area has tabs for 'Charts', 'User Stats', 'User Management', 'Dialer' (which is selected), and 'Contact Status'. Under the 'Dialer' tab, there are three sections: 'Dialer Incoming Numbers', 'Users verified phone numbers', and 'Recording'. The 'Dialer Incoming Numbers' section contains a table with columns 'Phone', 'Created', and 'Primary'. The 'Users verified phone numbers' section contains a table with columns 'Phone', 'Name', and 'Email'. The 'Recording' section has two toggle switches: 'Enable Recording' (which is turned off) and 'Allow Callers To Cancel Call Recording' (which is checked).

Phone	Created	Primary
+15555348279	Apr 8, 2020	Primary

Phone	Name	Email
+15555370739	Lavanya Kartik	lavanya.kartik@zoominfo.com

Enable Recording Allow Callers To Cancel Call Recording

2. Select **Enable Recording** to leverage Engage for call coaching. When call recording is enabled, callers have the ability to cancel recording on a per call basis.
3. To view recorded calls, you can:
 - Go to **Analytics > Call Logs**. You can view and filter recorded calls.
 - Go to a specific contact detail page and click **Calls** in the Engagement section.

Engage Salesforce integration details

For organizations that use Salesforce, Engage admins and users can connect to their Salesforce instance when completing the onboarding wizard, or from the user's account settings in Engage. This section describes important details for admins to understand and consider.

Connection details

Engage uses OAuthv2.0 as recommended by Salesforce to access Salesforce data. Policies and security are strictly enforced by Salesforce, including triggers and validation rules.

Salesforce API requirements

Salesforce enforces the number of API calls per day based on the Salesforce user license. To integrate with Salesforce, Engage requires one of the following Salesforce editions which include API access:

- Enterprise Edition
- Unlimited Edition
- Developer Edition
- Performance Edition

Working with leads and contacts

Engage does not sync all Salesforce contacts, relying on Salesforce to present the most up-to-date contact information until an Engage user performs one of the following actions:

- Sends an email
- Uses the dialer
- Adds a contact to a Salesflow

With these actions, Engage makes a copy of contacts to be used for analytics and reporting. Contact details in Salesforce remain the “one source of truth,” and any edits must be done in Salesforce.

Adding a contact to Engage

Engage users can add a contact to Engage by one of the following methods:

- Importing a CSV file
- Using the New Contact button
- Using the ZoomInfo integration

When a contact is added, Engage checks Salesforce to see if the lead or contact exists based on the email address, name, and phone number.

- If the lead or contact exists, Engage will use the contact information from Salesforce. Engage does not duplicate leads or contacts in Salesforce.
- If the contact does not exist, Engage can be configured to create a new lead, create a new contact, or not create a new lead or contact in Salesforce.

Updating Salesforce leads or contacts in Engage

Engage prevents updating a Salesforce contact from Engage - all update operations must occur in Salesforce with the following exceptions for bi-directional fields:

- **Contact Email Opt Out field:** If mapped, this field is updated when a prospect clicks the unsubscribe link in an Engage-generated email.
- **CRM Lead Status field:** If mapped, this field is updated when an Engage user updates the Engage Contact Status within Engage.

Note: Custom CRM Contact Status fields are not currently supported.

Deleting Salesforce leads or contacts in Engage

Engage prevents the deletion of Salesforce contacts. All delete operations must occur in Salesforce.

Call activity synchronization

For each call made from the Engage Dialer, a completed task is logged under the Lead/Contact Activity History. The following Task fields are automatically populated based on the information the user inputs into the Call Log.

CRM Task	Details
Subject	Engage Call: {Subject}: If your Task Subject has a picklist, the picklist is shown in the Engage Call Subject field. A user can type a Subject and/or use the CRM picklist.
Call Result	{PicklistValue}: <ul style="list-style-type: none"> • Connected via direct line: Considered a “conversation” • Connected via switchboard: Considered a “conversation” • Referred to colleague: Considered a “conversation” • Left message • No answer • Wrong number • Gatekeeper - blocked
Comments	The comments section will capture the following four Engage call log fields: <ul style="list-style-type: none"> • Sentiment: This picklist field is only available when the call Result

	<p>was a “conversation”. A call is considered a conversation when the Call Result equals <i>Connected via direct line</i>, <i>Connected via switchboard</i>, or <i>Referred to a colleague</i>.</p> <ul style="list-style-type: none"> ○ Bad timing ○ No fit ○ Not interested ○ Request for callback ○ More information requested ○ Next step booked <ul style="list-style-type: none"> ● Comments: Open text field ● VoiceMail Left: {VmTitle} ● Call Recording URL: {CallRecording URL} if call recording is enabled by the Engage admin.
Call Duration (minutes)	{CallTime}
Call Duration (seconds)	{CallTime}

Email activity synchronization

For each email event, Engage sets the title, date, and optionally the description. The following activities are logged in Salesforce as a completed Task.

CRM Task	Details
Subject	<p>Engage: {Event} {EmailSubject} or {LinkText}:</p> <ul style="list-style-type: none"> ● Sent Email. This completed Task also includes the original email message body sent. ● Email opened ● Email failed ● Contact unsubscribed ● Content viewed. Occurs when the recipient clicks one of the attachment links that in turn takes the recipient to the Engage content landing page in a new browser tab. ● Content downloaded ● A link clicked. Occurs when the recipient clicks a tracked hyperlink. ● Email reply. Occurs when the recipient replies directly to the email originated from Engage. For this event to be logged, the user must be connected to their email server, Office 365, Exchange, or Gmail.
Comments	{EmailMessageBody}

Security and privacy FAQs

What happens to the Engage account when my employee leaves?

We recommend disabling access to Salesforce when an employee leaves your organization. This will also prevent access to Salesforce from Engage. As an Admin Engage user, you can delete the Engage user from the **Admin > User Management** page. When a user is deleted from Engage, all of their integrations are disconnected.

Does Engage have all my company contact data?

No. Engage does not use a true sync mechanism to manage Salesforce leads and contacts. Engage uses API directly to display the most current Salesforce lead or contact details.

Will Engage pollute my company contact data?

Engage makes the best effort not to pollute the CRM Lead/Contact data by:

Not creating duplicate leads or contacts in Salesforce

Honoring the validation rules. For example, if the validation rule requires a valid two state code, Engage will correspondingly honor that rule.

Honoring other Salesforce policies and security configuration in Salesforce. For example, Salesforce Duplicate rules.

Do all users who use Engage must be connected to Salesforce?

No. For each user, connecting to Salesforce is optional. If connected, we recommend that all users connect to the same instance of Salesforce to keep your Engage Contacts free from data pollution.

Can I turn my Salesforce integration on or off for my organization?

Yes. For assistance, contact engagesupport@zoominfo.com. In addition, you can configure the Lead/Contact Sync and/or Lead/Contact Activities that flow to Salesforce from the Admin CRM section.