

ZoomInfo

Engage FAQ

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Dialer

How many dials can I make each month?

Engage allows each user to have 1,000 pooled minutes per month that they are able to use. You can add additional pooled dialer minutes for \$200/year for 1,000 minutes per month.

What if I go over my monthly dialer minutes? Will you shut off my phone?

We will not shut off your phone. If you find that you are consistently exceeding your monthly allotment of minutes, reach out to your Account Manager, Customer Success Manager, or the Engage support team to purchase bulk dialer minutes.

How are minutes tracked?

Time spent on the dialer is rounded up to the next minute, i.e., if you only have a 15-second call, it will be billed as 1 minute.



Is international dialing available?

International calling is available by request in select countries, but it is not on by default. Please contact your Account Manager or Support to request enabling international calling. Restricted countries currently include: China and North Korea.

What kind of phone can be connected to the dialer?

The Bridge dialer works with your desk or mobile phone, including some 3rd party VoIP systems. When you connect to the Bridge dialer, you can click to call inside Engage, and the dialer will make those calls as long as you stay connected to the session. As an alternative to the phone Bridge, you can use the VoIP (Voice over Internet Protocol) option to make and receive calls directly from the Engage platform. Available countries for users to choose a VoIP phone number include the United States, Canada, United Kingdom, and Australia.

Should I use the Bridge dialer or the VoIP dialer?

Bridge – You can connect your desk phone, cell phone, or 3rd party system* to Engage by using our Bridge option. To activate, Engage will call your number, ask you to verify by entering a validation code. Now, all outbound calls will be displayed on recipient's caller ID as your verified number. When using Bridge to call prospects, it will call your phone to start a session and you can use our Auto-dialer to conduct large scale call lists. Outbound call activity is tracked in Engage and your integrated CRM. Inbound call activity is not tracked.

VoIP – Choose a VoIP number to use for both inbound and outbound calling. All call activity is tracked on a contact's profile in Engage and in your integrated CRM. The assigned VoIP number will be displayed on a prospect's caller ID. You can be provisioned a VoIP number from one of the following countries: US, Canada, UK, or Australia.

**Not all systems are supported*

How does Engage handle phone extensions?

The Engage dialer can make outbound calls with extensions. When using the VoIP option, you can make outbound calls using our dialpad or by simply clicking on a contact's phone number.

How many pre-recorded voicemails can I set up and use in Engage?

You can record up to 25 different voicemails to use when conducting call campaigns. You can drop the voicemail on a prospect's phone without needing to listen to it and move to your next call. This saves you both time and energy for the when you do connect with a prospect and have a conversation.

Will my Engage VoIP number show up as Potential Spam on my prospect's caller ID?

To prevent your VoIP number showing up as Potential Spam on a prospect's caller ID, we recommend you validate your business through Trusted Calling. Within the Engage Admin section, the process for registering your VoIP number with Trusted Calling is available under the Dialer tab. This is a one-type registration for your entire team.



Email / Salesflows

How many emails can I send per day in Engage?

Individual users can send up to 1,000 emails per day through Engage. This is imposed to protect the users from:

- Being marked as spam
- Tarnishing their company's Domain Health and becoming blacklisted
- Damaging their company's IP Sending reputation

How many contacts can I add to a Salesflow?

A maximum of 500 contacts can be active in any Salesflow. If more than 500 contacts are added to the Salesflow, the overage will be added to the Waiting Room. When a contact exits the Salesflow or completes all Salesflow steps, a contact from the Waiting Room will be scheduled to start the first step of the Salesflow.

What if I want to send all 1,000 daily emails as part of a Salesflow?

As mentioned, 500 is the limit in a single Salesflow. However, you could have multiple Salesflows running simultaneously. Thus, you can still send 1,000 emails per day strictly from Salesflows.

How can I import contacts to Engage?

There are several ways that you can import contacts into Engage. You can:

- Manually enter individual contacts.
- Upload a CSV file (up to 5K rows or 7 MB).
- Use the Engage Chrome extension across SalesOS, Salesforce, MS Dynamics, or Gmail.
- Export contacts with the SalesOS integration.
- Export a contact using the ReachOut Chrome extension.
- Lists from your CRM (Salesforce or Dynamics).
- Saved Searches or Tagged Contacts can automatically be synced from SalesOS to Engage on a daily, weekly, or monthly frequency.
- Automate contacts via SalesOS Workflows in real time, daily, weekly, or monthly.

Can I add images to the email signature line?

Yes. In the upper right corner, hover above your name and click on My Account. Click on Edit in the Email Signature bar and select the signature you want to edit. Insert the image in your signature by clicking the Insert Image icon in the editor. Click Save.

Do I have to connect my email service to Engage in order to send emails?

Yes, you must connect Engage to either Gmail or Office 365 to send emails. Emails sent from Engage will come from that email address.



Can I have one contact in multiple Salesflows?

Preventing a contact from being in two different Salesflows at the same time is best practice to avoid repeated or mixed messages. The Salesflow exclusivity setting is enabled by default. You have the ability to “Allow use of prospects in other workflows in addition to this one” by checking this box in the Salesflow settings.

What does it mean when my email status is “failed”?

Engage tracks both hard and soft bounces. Contacts can be filtered by Failed Delivery in order to identify the type of email bounce. If your email failed because of a soft bounce, such as a full mailbox, it's possible to follow up with that contact later. If the email failed because of a hard bounce, such as an invalid email address, users know there is nothing they can do, and they may want to remove them from Engage and research for a valid email address on SalesOS.

Is there a limit to the number of contacts I can upload via CSV?

The limit of contacts per CSV file is 5,000 or 7 MB. If you have more than 5,000 contacts you'd like to upload via CSV, it will have to be done in more than one upload.

When are automatic emails sent as part of Salesflows?

By default, Salesflow automatic emails are sent Monday through Friday between 8:00 am and 6:00 pm according to your Time Zone, Business Hours, and Holidays. Weekends and holidays are skipped by default. You can customize these settings on the My Account > Profile page. In addition, you can select a specific time for Salesflow auto emails to be sent per step.

Do “Out of Office” replies end a Salesflow?

A legitimate reply will stop a Salesflow, but an accurately detected “Out of Office” will not. Engage attempts to detect “Out of Office” replies and will pause contacts for a specified number of days before resuming them in the next Salesflow step. You have control to decide the number days to pause contacts when an Out of Office reply is detected. With that said, detecting these messages with 100% accuracy is difficult, so some may be missed.

When will a contact be removed from a Salesflow?

A contact will be removed from a Salesflow based on the settings you select for that particular Salesflow. By default, when a contact replies to an email, unsubscribes, or there is a hard bounce they will be removed. You can choose to remove contacts if they click on a tracked hyperlink within an email or when logging a call with a specific Result or Sentiment. You can also manually remove contact(s) from a Salesflow at any time.

Will past email and call activities for contacts in Salesforce, HubSpot, or Dynamics be pulled in?

No. Only new email and call activities will start aggregating in Engage after your CRM implementation is completed.



Can I verify and cleanse email addresses in Engage?

Yes. When importing contacts into Engage, you can cleanse and validate their email addresses using NeverBounce. Admin settings provide controls for how invalid emails are handled. Admins can allow (i.e. by marking contact statuses with 'Invalid') or completely block contacts with invalid emails from being imported into Engage for their team. NeverBounce is included with all subscriptions of Engage.

How does Engage track email opens, link clicks, etc?

Engage inserts a tracking pixel in emails for tracking purposes. It will identify opens, replies, links clicked, and IP location.

Credits

Do I need to buy credits for Engage? How do credits work in Engage?

No, you do not need to buy credits for Engage. Pricing is based on the number of users. It does not cost any credits to dial or email contacts within Engage.

How do credits work between SalesOS and Engage?

If you are exporting contacts from SalesOS to Engage via the Engage connector, each exported contact will cost one credit. This is the same as any other connector within the SalesOS platform including all ZoomInfo Chrome extensions.

SalesOS

Do I need access to both SalesOS and Engage to see the Sales Engagement features?

Yes, you need to be provisioned on both SalesOS and Engage in order to take advantage of these features.

Can I bulk email within SalesOS?

Yes. You can email contacts individually or in bulk from within SalesOS.

Can I bulk call within SalesOS?

No. In order to bulk call contacts, you will need to leverage Engage or the Engage Chrome extension.

Can I create a new Salesflow within SalesOS using 'Add to Salesflow'?

No, only existing Salesflows available to you within your instance of Engage are accessible through 'Add to Salesflow' in SalesOS. You can create new Salesflows within Engage.

Will all my activity sync between SalesOS and Engage, no matter where I initiated it?

Yes. No matter where you call or email, that activity will reflect both within Engage and SalesOS.



Does emailing, calling, or adding to a Salesflow in SalesOS consume credits?

Yes. Emailing, calling, or adding a Contact to a Salesflow in SalesOS will consume a credit and automatically create a Contact and associated Account in Engage.

Does using 'Quick View' next to a contact's record in SalesOS consume credits?

No.

Do I need to purchase a Chorus package to get the Discussed Topics Engagement filters in SalesOS to work for emails, calls and online meetings?

If you do not have Chorus, we include 20-30 Chorus-built AI Trackers within the Discussed Topics of the Engagement filter. These trackers work for emails and calls, but not online meetings.

Do manually logged calls show up in the Engagement filters and a contact's Activity Feed in SalesOS?

Yes. Manually logged calls show up in a contact's Activity feed and are filterable using the Engagement filters.

Can I use my SalesOS login credentials to log into Engage?

Yes. Our unified login allows you to enter your username and password once, select the platform you want to access, and toggle between additional product subscriptions via the waffle/grid menu in the upper right corner.

Does Engage work with the SalesOS ReachOut Chrome Extension?

Yes, you can export a contact from ReachOut to Engage. Click the Export button in ReachOut and select Engage from the drop-down menu. Then, you'll be able to add the contact to one of your Salesflows and schedule it if desired.

Is Engage included as part of my SalesOS subscription?

No. Engage is not a part of your subscription of SalesOS. You can purchase Engage either on its own or in addition to SalesOS.

Other

Is Engage GDPR compliant?

Yes. Engage manages unsubscribed contacts for GDPR compliance. By using EU data provided by ZoomInfo, you can be confident that its collection was performed in full alignment with the regulation. It will still be important for you to ensure their email messages and content are compliant with the various direct marketing laws around the world.

Can Engage automate my prospecting efforts?

Yes. Engage can automate any auto email step within a Salesflow. In addition, you can sync targeted contacts from SalesOS to automatically be imported to Engage and added to a Salesflow.



Can I restrict the number of daily emails per user?

Yes, admins can set the daily email quota from 1 to 1,000 per user. Also, the number of emails sent to a specific email domain and emails sent per minute can be controlled from within the Org. Management section of the Engage Admin settings.

Can I send emails on behalf of a colleague?

Yes. Admin settings can allow or prevent individual users from being able to send emails on behalf of other licensed users. All emails will be sent from their email account. In addition, replies and tasks will be visible only by the sent on behalf of the user.

