



zoominfo

Agentforce ZoomInfo MCP Integration

What is ZoomInfo MCP?

Connect ZoomInfo's B2B intelligence directly to your AI assistant. Ask natural questions and get instant access to 100M+ company profiles, 300M+ professional contacts, and your organization's CRM and conversation history.

MCP Tools

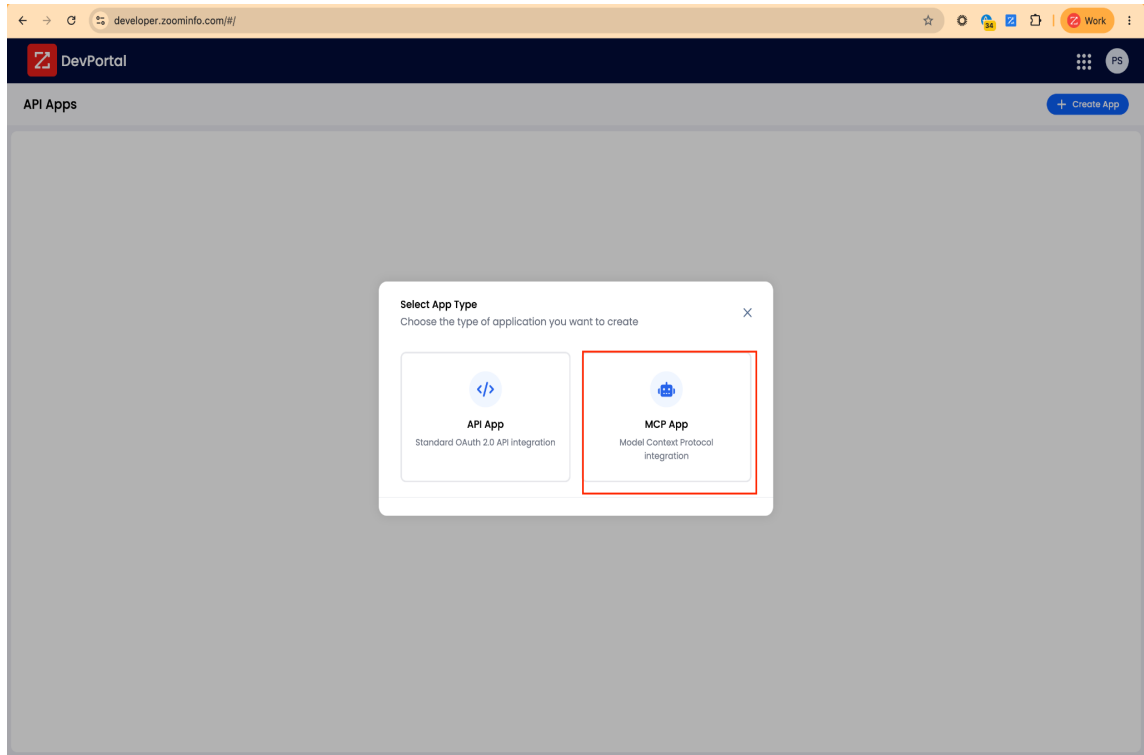
<https://docs.zoominfo.com/docs/available-mcp-tools>

Prerequisites

- ZoomInfo access (any SalesOS or Copilot subscription will work)
- Access to MCP in Agentforce ([Link](#))

MCP Application Registration in Dev Portal

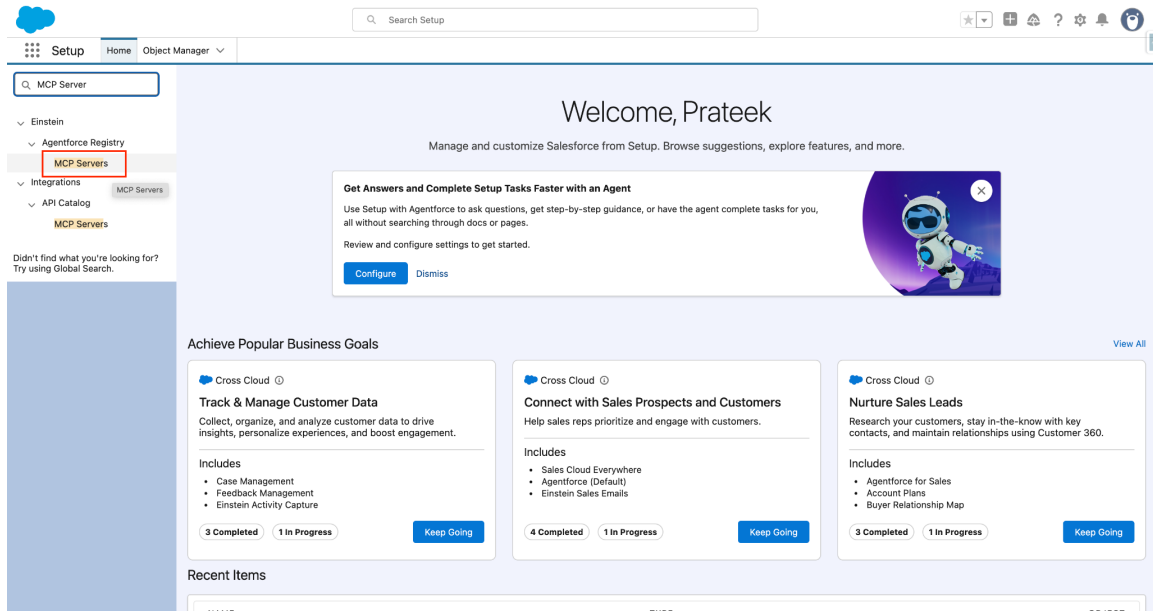
1. Navigate to <https://developer.zoominfo.com> and click the "Create App" button in the top right corner. Once clicked, a modal will appear with options for both API and MCP. Select "MCP App".



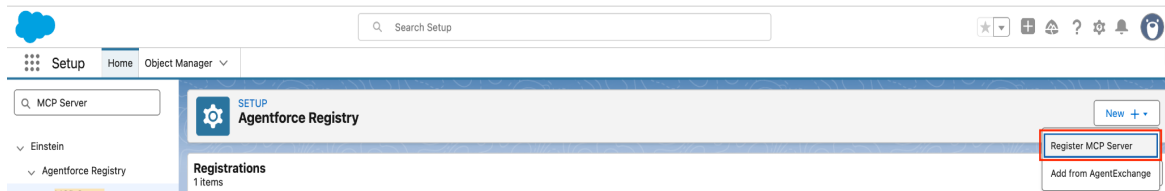
2. On the next page, enter a name for your application as **"AgentforceZoomInfoMCP"**.
3. Ensure that you select **"Client Credentials"** for the authentication method.
4. Add the following under the Use case section: ***"Connect Salesforce Agentforce to ZoomInfo MCP tools to search and enrich companies and contacts, access buying signals, and perform account and contact research for smarter, context-aware sales automation."***

MCP Registration in Salesforce

1. Log in to Salesforce - [Link](#).
2. From Setup, search for MCP Server under Agentforce Registry.



3. Click New and select “Register MCP Server”.



4. Enter the following information:
 - **MCP Server Name:** AgentforceZoomInfoMCP
 - **Description:** Connect Salesforce Agentforce to ZoomInfo MCP tools to access ZoomInfo data directly within your AI workflows. Search and enrich companies and contacts, retrieve buying signals, and perform Account Research/Intelligence and Contact Research to power smarter, context-aware sales workflows.
 - **Server URL:** <https://mcp.zoominfo.com/mcp>
 - **Authentication Method:** OAuth 2.0
 - **Identity Provider URL:** <https://api.zoominfo.com/gtm/oauth/v1/token>
 - **Scope:** Leave blank.
 - **Client ID:** Copy the value from Step 6.

- **Client Secret:** Copy the value from Step 6.
- Click Create and Continue.
- Review the available MCP tools and their descriptions. Select all tools except those marked with a **Deprecation Warning**.

Create Connection
Create a connection between Salesforce and an MCP server.

*MCP Server Name
AgentforceZoomInfoMCP → Paste the application name of the registered MCP app in Zoominfo Dev portal. Note: The application name is case sensitive.

Description
Connect Salesforce Agentforce to Zoominfo MCP tools to access Zoominfo data directly within your AI workflows. Search and enrich companies and contacts, retrieve buying signals, and perform Account Research/Intelligence and Contact Research to power smarter, context-aware sales automation and recommendations.

*Server URL
https://mcp.zoominfo.com/mcp

Authentication Method
OAuth 2.0

*Identity Provider URL
https://api.zoominfo.com/gtm/oauth/v1/token

Scope
Enter a scope...

*Client ID
XXXXXXXXXXXXXXXX

*Client Secret
.....

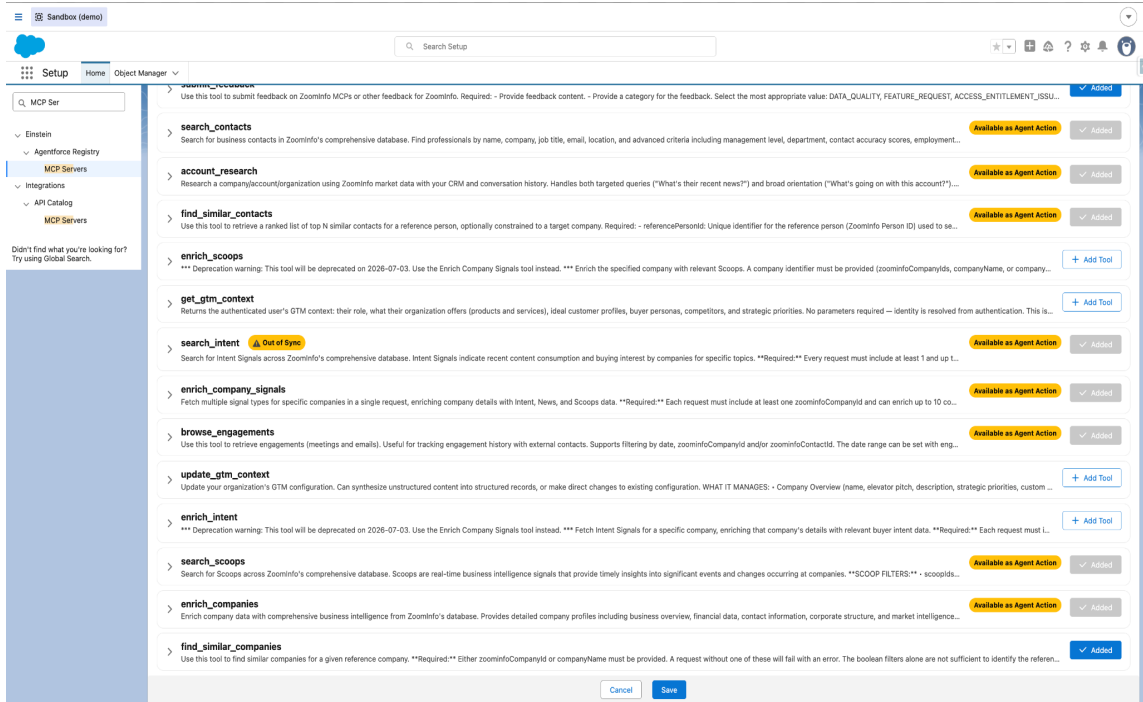
Cancel Create and Continue

ZoominfoMCPTest
Source: Manual Connection Status: Active

Details Tools Policies

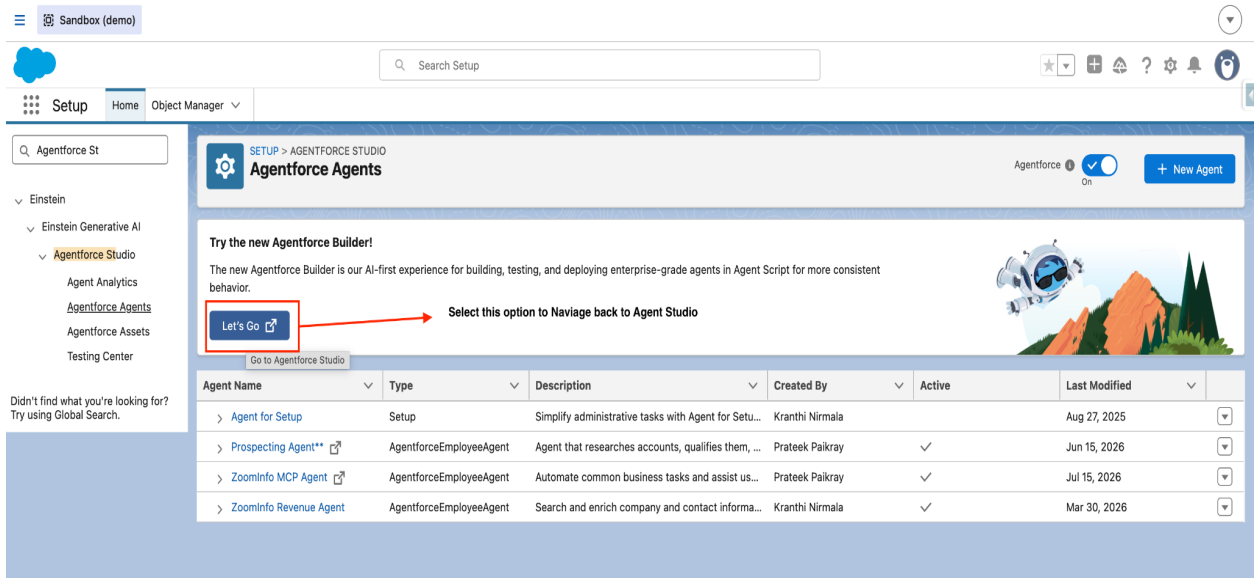
Tools (15 Selected)

- enrich_news**
*** Deprecation warning: This tool will be deprecated on 2026-07-03. Use the Enrich Company Signals tool instead. *** Fetch News articles for a specific company, enriching that company's det... [+ Add Tool](#)
- contact_research**
Research a specific person/contact using Zoominfo market data with your CRM and conversation history. Handles both targeted queries ("What's their background?")... [Available as Agent Action](#) ☒ Added
- get_recommended_contacts**
Use this tool to retrieve a ranked list of top N contact recommendations at a target company based on the users interaction history. Required: - Company ID to search with. If you don't have this yet... ☒ Added
- enrich_contacts**
Enrich contacts data with verified business information from Zoominfo's database. All data returned by this tool is strictly business-related — including corporate em... [Available as Agent Action](#) ☒ Added
- lookup**
Lookup reference data - This tool provides standardized parameter values for use in search operations. Using lookup helps ensure accurate search results. **Note: U... [Available as Agent Action](#) ☒ Added
- search_companies**
Search for companies in Zoominfo's comprehensive business database. Find companies by name, domain, industry, location, employee count, revenue, growth metric... [Available as Agent Action](#) ☒ Added
- submit_feedback**
Use this tool to submit feedback on Zoominfo MCPs or other feedback for Zoominfo. Required: - Provide feedback content. - Provide a category for the feedback. Select the most appropriate value... ☒ Added
- search_contacts**
Search for business contacts in Zoominfo's comprehensive database. Find professionals by name, company, job title, email, location, and advanced criteria including ... [Available as Agent Action](#) ☒ Added



- Click Save.

5. Navigate back to Setup. In the Quick Search box, search for Agentforce Agents, then click Let's Go to open the Agentforce Builder.



6. Select Agentforce Employee Agent.

← Agentforce Builder

What do you want your agent to do?

Describe the purpose of your agent, or what you'd like it to do...

Or, start with a template

Agentforce Service Agent Deliver personalized customer interactions with an autonomous AI a... Select Details	Agentforce Employee Agent Automate common business tasks and assist users in their flow of w... Select Details	Prospecting Agent AI sales representative that discovers, researches and qualifies pros... Select Details
Field Service Mobile Work Support Field Service mobile workers in their daily tasks. In the Works	Flow Automation Agent Help users summarize flows in Flow Builder. In the Works	Agentforce for Guided Shopping - B2B & D2C Deliver personalized customer interactions with an autonomous AI a... In the Works
Content Builder Agent Interacts with the user to draft or revise content for Marketing Cloud... In the Works	Billing Employee Assistance Deliver accurate and timely billing support with an autonomous AI ag... In the Works	Sales Agent Help sales reps through every step of the sales process. In the Works
Lead Nurturing for Modularity	Analytics and Visualization	Guided Shopping for B2C Storefronts

7. Give your Agent Name: **ZoomInfo MCP Agent**

Name your agent

Give your agent a name so you can start building. You can change this later.

* Agent Name

* Developer Name

[Cancel](#) [Let's Go](#)

- Update the Agent Details with the following instructions:

“Route each request to the appropriate ZoomInfo subagent. Use Company Intelligence for company search, enrichment, firmographics, intent, Scoops, engagement, and account intelligence. Use Contact Intelligence for contact search, enrichment, professional details, contact information, employment data, and decision-maker discovery. For requests involving both, invoke Company Intelligence first to identify or validate the company, then pass the confirmed

company context to Contact Intelligence. For search requests, ensure the selected subagent normalizes supported filters with the Lookup Data tool before searching. Preserve all user constraints, do not fabricate data, and combine results concisely.”

- From the left navigation, under **Sub Agents**, remove the existing preconfigured sub agents. Then click the + icon to create the following two sub agents:
 - a. **ZoomInfo Company Intelligence**
 - b. **ZoomInfo Contact Intelligence**

Select one of the newly created sub agents, then click the + icon to add an action. A pop-up window will open, allowing you to review and select the MCP tools available in the **Asset Library** to add to the sub agent.

Configure each sub agent and its tool as shown in the screenshot below.

Add the following reasoning instructions to each of these subagents:

- **ZoomInfo Company Intelligence:** *“Use ZoomInfo tools for company search, enrichment, firmographics, intent, Scoops, engagement, and account intelligence. Treat requests using filters or discovery criteria as search requests. Before searching, use the Lookup Data tool to normalize supported values such as industry, location, company type, revenue range, and employee range. If multiple normalized values are relevant, use the closest match or return the options when the intent is unclear. For enrichment, use exact identifiers such as ZoomInfo Company ID, domain, or company name without Lookup Data. Apply filters precisely and do not fabricate missing data.”*
- **ZoomInfo Contact Intelligence:** *“Use ZoomInfo tools for contact search, enrichment, professional details, employment data, contact information, engagement, and decision-maker discovery. Treat requests using role, title, department, seniority, location, or other discovery criteria as search requests. Before searching, use the Lookup Data tool to normalize supported values. If multiple normalized values are relevant, use the closest match or return the options when the intent is unclear. For enrichment, use exact identifiers such as ZoomInfo Contact ID, business email, LinkedIn URL, or full name with company without Lookup Data. Apply filters precisely and do not fabricate missing data.”*

- Click **Save** and select **Commit Version**, and then **Activate**.

Agent Definition

Basic Information

Agent Name	* Developer Name
ZoomInfo MCP Agent	ZoomInfo_MCP_Agent
AgentID	DXxdn000000lzpCAA

*Description ⓘ
Automate common business tasks and assist users in their flow of work. Agentforce Employee Agent can search knowledge articles and other data sources. Customize it further to meet your employees' business needs.

Subagents

Subagents represent the jobs your agent can perform. Each includes actions, instructions, and metadata that guide how the agent responds.

Subagent	Description
Zoominfo Company Intelligence	Ability to search, research and access buying signals
Zoominfo Contact Intelligence	Ability to search , enrich and research contact information

- Navigate back to **Setup**. In the **Quick Search** box, search for **Permission Sets**. Then search for and select the **AgentforceZoomInfoMCP_Permission** permission set.

Note: When an MCP server is registered, Salesforce automatically creates a permission set using the following naming convention: **<MCP Server Name>_Permission Set**. Refer to the screenshot below for an example.

Permission Sets

On this page you can create, view, and manage permission sets.

Action	Permission Set Name	Description	License
Clone	ZoomInfo Admin	Enables access to ZoomInfo related tabs, visualforce pages, custom objects, c...	
Clone	ZoomInfo Agent Access	Permission set for ZoomInfo Agent Access - provides access to ZoomInfo integ...	Salesforce
Clone	ZoomInfo Enrich Admin Access	Permission set for accessing Enrich Private Key metadata type - System Admi...	Salesforce
Clone	ZoomInfo User	Enables user access to ZoomInfo related tabs, visualforce pages, custom obje...	
Del Clone	ZoomInfoMCPTest - Permission Set	Perm set for MCP Server 'ZoomInfoMCPTest'	

Upon MCP Server Registration, System automatically creates a permissionset with a name as <MCPServerName> - Permission Set

9. Click on Manage Assignment to assign it to the salesforce users who would be accessing this agent.

The first screenshot shows the Salesforce Setup interface for the 'ZoomInfoMCPTest - Permission Set'. The 'Manage Assignments' tab is highlighted in red. The 'Permission Set Overview' section shows the following details:

Field	Value
Description	Perm set for MCP Server 'ZoomInfoMCPTest'
API Name	ZoomInfoMCPTest_Perm_Set
Namespace Prefix	
Created By	Prateek Paikray, 7/14/2026, 5:15 AM
Last Modified By	Prateek Paikray, 7/14/2026, 5:15 AM
Session Activation Required	☐
Permission Set Groups Added To	0

The second screenshot shows the 'Current Assignments' table for the 'ZoomInfoMCPTest - Permission Set'. The 'Add Assignment' button is highlighted in red.

Full Name	Active	Role	Profile	User License	Expires On
☐ Platform Integration User	☒				
☐ Prateek Paikray	☒		System Administrator	Salesforce	

10. After assigning the permission set to the user, open **Agent Access Configuration** and click **Edit**. Add the **ZoomInfo MCP Agent** to the list of assigned agents and save your changes.

Developer Edition

Search Setup

Setup Home Object Manager

Permission Sets

Users

Permission Sets

Didn't find what you're looking for?
Try using Global Search.

SETUP

Permission Sets

Permission Set Overview

Description

Perm set for MCP Server 'ZoomInfoMCPTest'

API Name

ZoomInfoMCPTest_Perm_Set

License

Namespace Prefix

Session Activation Required

☐

Created By

Prateek Pathay, 7/14/2026, 5:15 AM

Permission Set Groups Added To

0

Last Modified By

Prateek Pathay, 7/14/2026, 5:15 AM

Apps

Assigned Apps

Settings that specify which apps are visible in the app menu

Assigned Connected Apps

Settings that specify which connected apps are visible in the app menu

Object Settings

Permissions to access objects and fields, and settings such as tab availability

App Permissions

Permissions to perform app-specific actions, such as "Manage Call Centers"

Apex Class Access

Permissions to execute Apex classes

Visualforce Page Access

Permissions to execute Visualforce pages

External Data Source Access

Permissions to authenticate against external data sources

Flow Access

Permissions to execute Flows

Named Credential Access

Permissions to authenticate against named credentials

External Credential Principal Access

Permissions to authenticate with external credential principal mappings

Custom Permissions

Permissions to access custom processes and apps

Custom Metadata Types

Permissions to access custom metadata types

Custom Setting Definitions

Permissions to access custom settings

Organization-Wide Email Address Access

Permissions to send email with organization-wide email address

Standard Invoicable Action Type Access

Permissions to access invocable actions

Agent Access

Permissions to access Agents

Settings that apply to Salesforce apps, such as Sales, and custom apps built on the Lightning Platform.
[Learn More](#)

Setup Home Object Manager

Permission Sets

Users

Permission Sets

Didn't find what you're looking for?
Try using Global Search.

SETUP

Permission Sets

Permission Set

ZoomInfoMCPTest - Permission Set

Video Tutorial | Help for this Page

Find Settings... Clone Edit Properties Manage Assignments View Summary

Permission Set Overview > Agent Access

Items per page: 50 Items

View: All

Agent Access

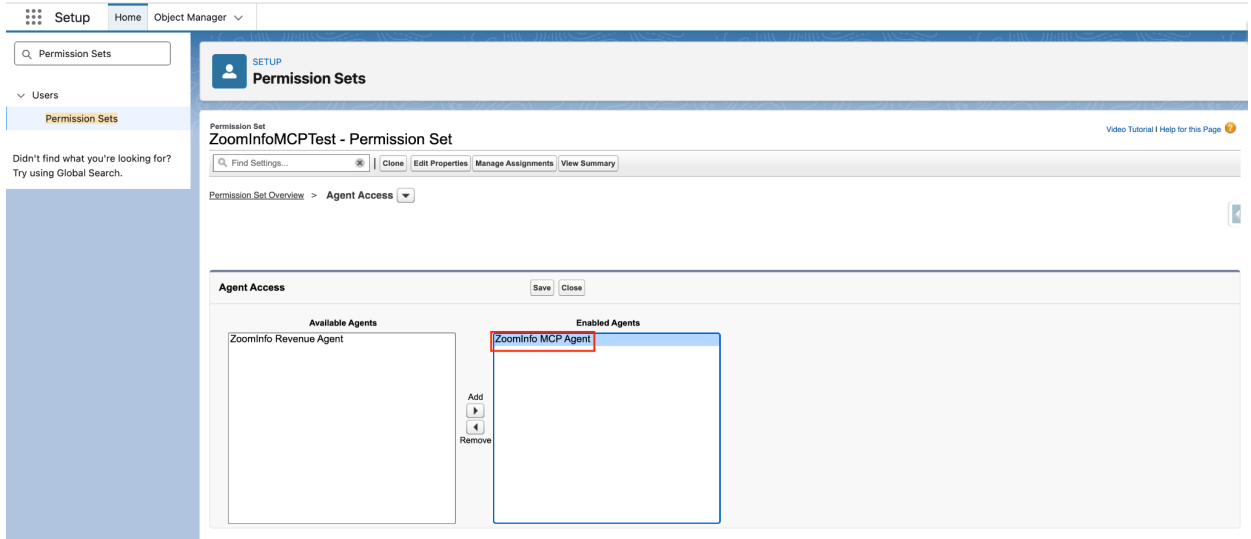
Edit

Click Edit and Select your MCP Agent

Agent Name

ZoomInfo MCP Agent

Page 1 of 1



11. Navigate to the Sales application, then click the Agent icon to launch the agent.

