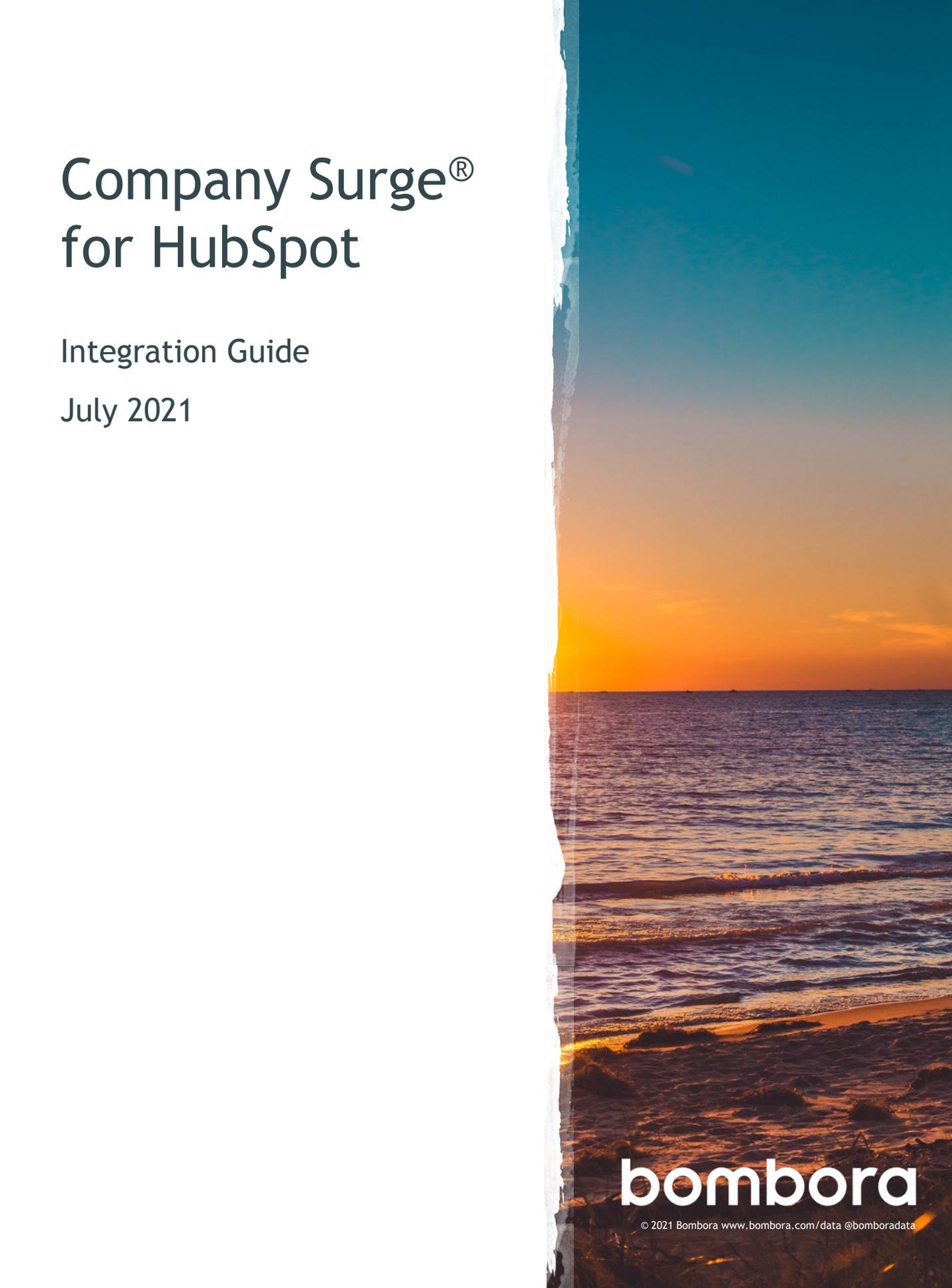


# Company Surge<sup>®</sup> for HubSpot

Integration Guide

July 2021



**bombora**

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# Connect to HubSpot (1 of 2)

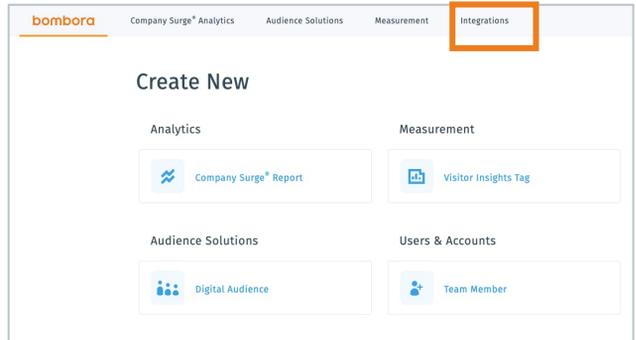
1.1 Login to Bombora user interface at [surge.bombora.com](https://surge.bombora.com).

1.2 Navigate to the 'Integrations' tab. (Figure 1)

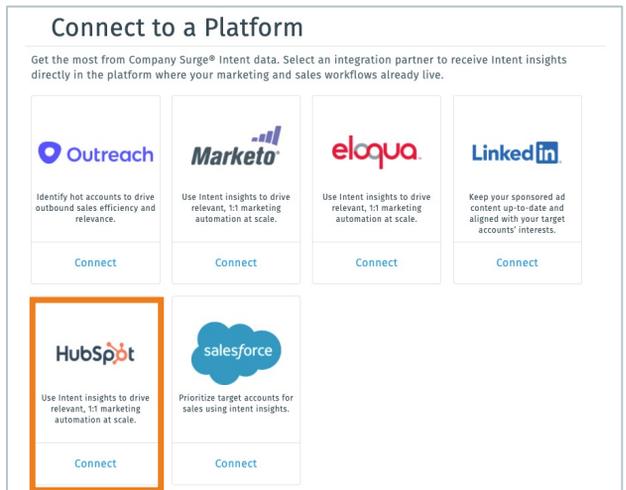
1.3 Click 'Connect' under the Hubspot logo. (Figure 2)

1.4 Click 'Connect'. (Figure 3)

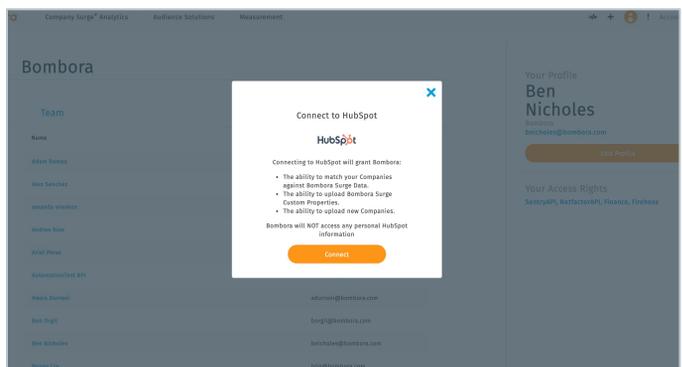
(Figure 1)



(Figure 2)



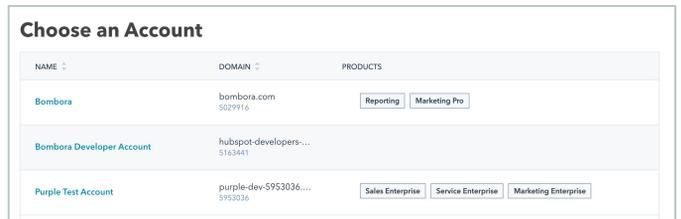
(Figure 3)



# Connect to HubSpot (2 of 2)

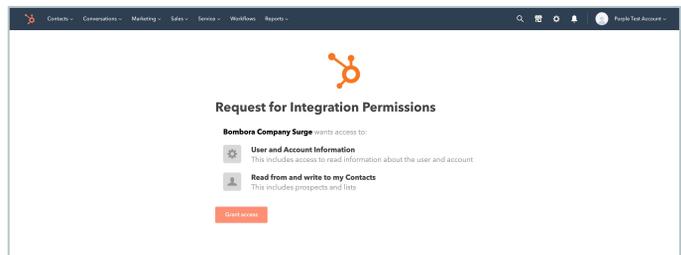
1.5 Select which HubSpot instance to grant Bombora access to connect. (Figure 4)

(Figure 4)



1.6 Confirm selection and click on 'Grant Access'. (Figure 5)

(Figure 5)



1.7 Success! Your HubSpot account should now be connected to Company Surge®. Bombora will automatically create two custom properties linked to a custom property group and your data will update weekly. (Figure 6)

(Figure 6)

<input type="checkbox"/>	NAME	GROUP
<input type="checkbox"/>	Add to Bombora Company Surge Single on/off checkbox	Bombora Company Surge
<input type="checkbox"/>	Bombora Company Surge New Company Single on/off checkbox	Bombora Company Surge

Custom property group:

- Bombora Company Surge

Custom properties include:

- Add to Bombora Company Surge
- Bombora Company Surge New Company

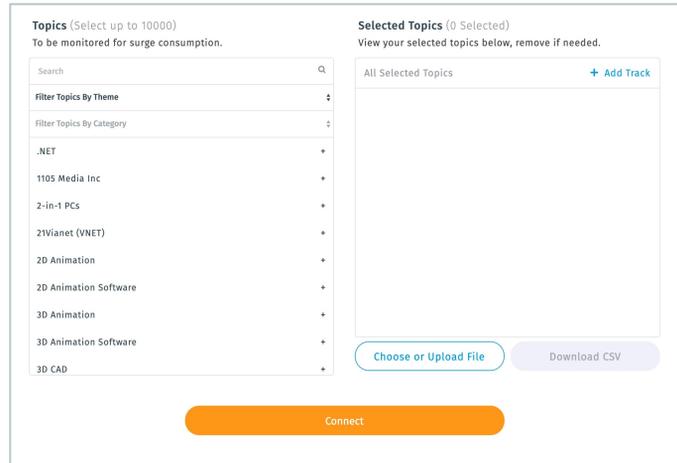
# Select topics and create desired topic clusters

2.1 Once authorized, click on ‘Integrations’ tab, ‘HubSpot’ icon, then ‘Edit Settings’ to configure topics.

There are two ways to apply Company Surge® data to companies in your HubSpot instance. If you wish to apply to all companies in your database, follow steps 2.2 - 2.4. If you do not wish to apply to all companies, follow steps 4.1

(Figure 7)

(Figure 7)



2.2 Select “All Companies” so Company Surge® data can be matched to all companies in your HubSpot database. (Figure 8)

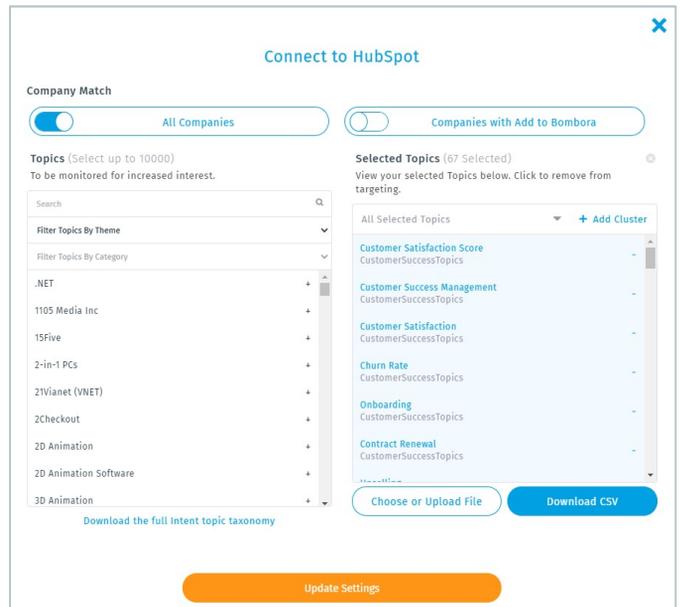
(Figure 8)



NOTE: If you do not wish to have Company Surge data applied to all companies in your HubSpot database, select “Companies with add to Bombora” and follow additional steps detailed in section 4.1.

2.3 Once your topics have been selected, and any desired clusters created, click ‘Update settings’. (Figure 9)

(Figure 9)

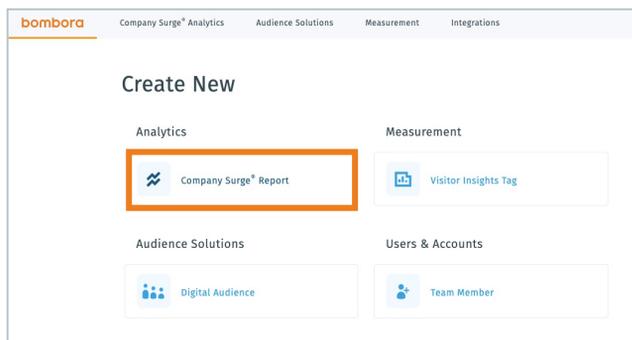


2.4 Success! You’ve now completed your selection of topics and topic clusters for your HubSpot integration.

# Optional: Create a new Company Surge® report to send net new businesses to HubSpot

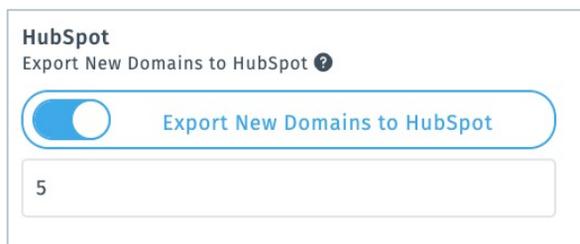
**3.1** For admin users (the person that authorized the integration), click on the Bombora logo on the top left to go back to the homepage and click on ‘Create new Company Surge® report’ (Figure 10)

(Figure 10)



**3.2** Create a new Company Surge® report using your desired filters and click on the ‘HubSpot net new’ toggle. Select the number of net new businesses to send to HubSpot (max of 999 per report).

(Figure 11)



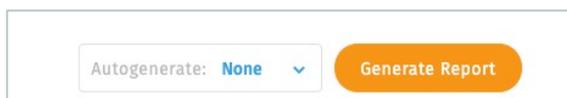
(Figure 11)

If you select the same topics as steps 2.1 - 2.3, Bombora will only send net new businesses through this workflow and will not duplicate data.

NOTE: The integration doesn’t currently support auto-generation of net new accounts on a weekly or monthly basis. To generate net new accounts using the same Company Surge® report, click on “Edit Report Settings,” and then “Generate Report.”

**3.3** Click ‘Generate Report.’ Success! Your HubSpot account should receive net new businesses identified from the most recent report delivered to HubSpot.

(Figure 12)



(Figure 12)

Net new businesses will be called out in your HubSpot instance under the ‘Bombora Company Surge New Company’ property group.

# Optional: Select businesses in HubSpot to apply Company Surge® data (1 of 2)

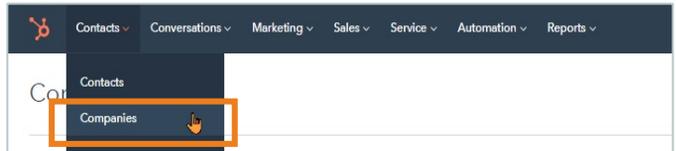
**4.1** NOTE: The following steps are only if you do not want Company Surge® data applied to all businesses in your database. To apply to all businesses, follow steps 2.2 - 2.4.

**4.2** Select 'Companies' from the 'Contacts' dropdown. (Figure 13)

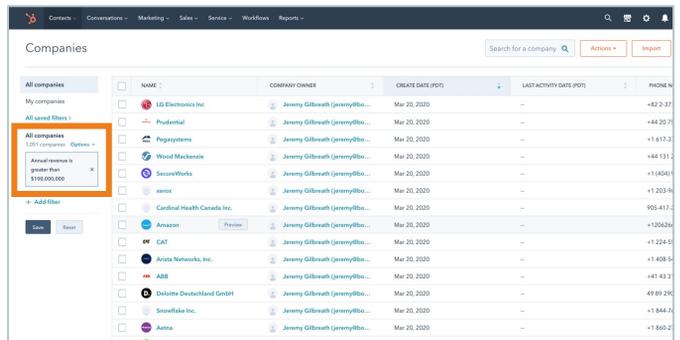
**4.3** Click 'More Filters' and create a filter to select all companies you would like to have matched against Company Surge® data.

In this example, companies were filtered to have an Annual Revenue of Greater than \$100,000,000. (Figure 14)

(Figure 13)



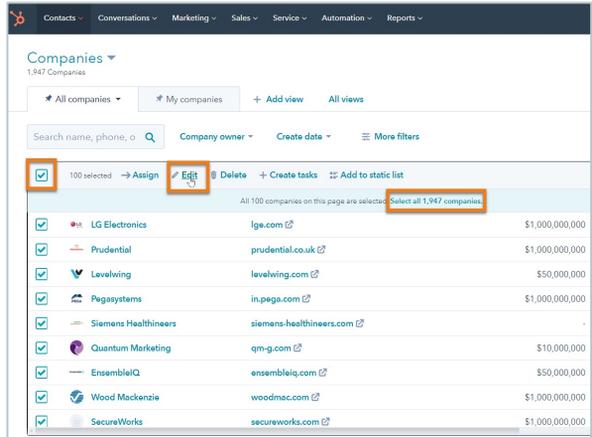
(Figure 14)



# Optional: Select businesses in HubSpot to apply Company Surge® data (2 of 2)

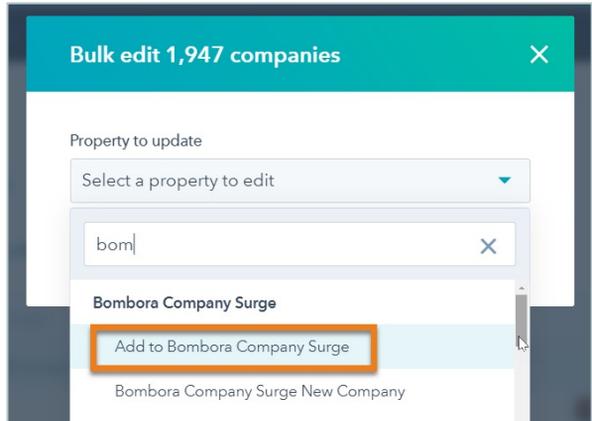
4.4 Once your list of companies to be synced is finalized, click the select all checkbox, then click 'Select all companies' and then 'Edit'. (Figure 15)

(Figure 15)



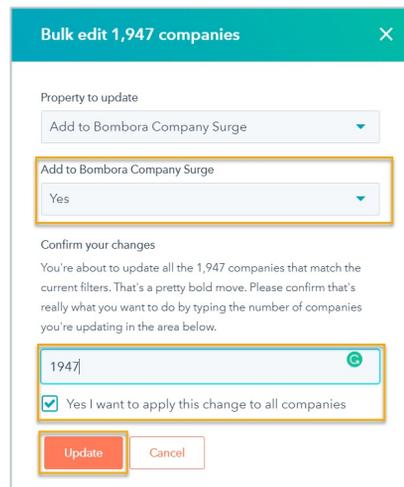
4.5 A bulk edit box will pop up. For 'Property to Update' select 'Add to Bombora Company Surge' from the dropdown menu. (Figure 16)

(Figure 16)



4.6 For 'Add to Bombora Company Surge,' select 'Yes', (follow verification prompts if instructed) and click 'Update'. (Figure 17)

(Figure 17)



The next scheduled Company Surge® update will consider these selected businesses to be matched against Company Surge® data.

# Glossary of standard HubSpot terms

Term	Definition
Contact (Record)	Used to record, store and track information about an individual person.
Company (Record)	Used as a company record to store and track information about an individual business or organization.
HubSpot defined property/Standard property	Used to store data on certain objects in HubSpot, such as contacts, companies, deals, and tickets
Custom property	Additional properties to record, store and track information for your business processes.
Calculated properties	Calculated properties lets you set up custom equations for integer-based properties. Allows you to automatically calculate the min, max, count, sum, or average value for properties on associated records.
Property group	Property groups helps organize properties.
Filter	View your contacts, companies, deals, or tickets that have specific characteristics. Custom saved filters help you quickly and easily see which contacts, companies, deals, or tickets meet the criteria you've set at any given time.
List - Contacts	In addition to contact property values, lists allow you to segment your contacts by using other filters such as page views, form submissions, and email interactions. Lists help for sending emails to a specific set of contacts or to enroll contacts in workflows.
List - Companies	In addition to company property values, lists allow you to segment your companies by using other filters such as web activity, target account info and social media interactions. Company lists help build audiences to enroll in account-based digital programs and in workflows.
Sequences	The sequences tool helps you send a series of targeted, timed email templates to nurture contacts or follow-up with them over time. When contacts reply to the email or book a meeting, they automatically un-enroll from the sequence. Sequences use a mix of personalized, well-timed emails and follow-up task reminders to automate communication with your leads. Create a sequence using a mix of email templates and task reminders.
Workflow	The workflows tool automates your sales and marketing efforts, as well as your internal processes. Workflows are used for processes where specific criterion is met and actions are set into motion automatically.
Contact-based workflow	A contact workflow triggers a series of automated actions based on a person's behaviors or contact information. Contact-based workflows include enrollment triggers such as contact properties, imports, and page views. Contact properties include lifecycle stage, job title, and contact owner. For example, you could enroll only contacts with the job title of CEO to receive specific communications.
Company-based workflow	A company workflow triggers a series of automated actions based on a company's behaviors or relevant information. Include filter types like industry and activity. Company properties include location of the company, the industry, and the number of employees. For example, this filter can help you send a targeted email to businesses located in Miami, Florida or companies in the healthcare industry. You can also enroll companies in a workflow based on a specific activity associated with the company record. These activities include meetings to tasks and calls logged to the record.

## Glossary of Bombora-specific HubSpot terms

Type	Term (Label)	Definition
Property Group	Bombora Company Surge	A property group on the company object that contains two properties relating to the Bombora HubSpot Integration. Contains properties "Add to Bombora Company Surge" and "Bombora Company Surge New Company"
Property	Add to Bombora Company Surge	Indicates if an account will be evaluated in the weekly Bombora Company Surge® data sync
Property	Bombora Company Surge New Company	Indicates if the company record was a net new addition by Bombora
Property Group	Bombora Company Surge - Rollup	A property group on the company object that provides Company Surge® inputs based on the entire selected topic list
Property	Bombora Rollup Count of Topics	Total active Intent topics for a given company record
Property	Bombora Rollup Average Score	Average Company Surge® score of active intent topics for a given company record
Property	Bombora Rollup Last Refresh Date	Last active date of Intent Topics for a given company record
Property	Bombora Rollup Topics	Active Intent topics for a given company record sorted from highest to lowest
Property Group	Bombora Company Surge - Non-Clustered	A property group on the company object that provides Company Surge® inputs based on topics that aren't mapped to a topic cluster
Property	Bombora Non-Clustered Count of Topics	Total active Intent topics that aren't mapped to a topic cluster for a given company record
Property	Bombora Non-Clustered Average Score	Average Company Surge® score of active intent topics that aren't mapped to a topic cluster for a given company record
Property	Bombora Non-Clustered Last Refresh Date	Last active date of Intent topics that aren't mapped to a topic cluster for a given company record
Property	Bombora Non-Clustered Topics	Active Intent topics that aren't mapped to a topic cluster for a given company record sorted from highest to lowest
Property Group	Bombora Company Surge - [Cluster Name]	A property group on the company object that provides Company Surge® inputs based on the topics mapped to a specific cluster
Property	Bombora [Cluster Name] Count of Topics	Total active Intent topics based on topics mapped to the cluster for a given company record
Property	Bombora [Cluster Name] Average Score	Average Company Surge® score of active intent topics mapped to the cluster at a given company record
Property	Bombora [Cluster Name] Last Refresh Date	Last active date of Intent topics based on topics mapped to the cluster for a given company record
Property	Bombora [Cluster Name] Topics	Active Intent topics based on topics mapped to the cluster for a given company record sorted from highest to lowest

# Surf's up. Let's take off.

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For technical support or questions,  
please contact us at  
[support@bombora.com](mailto:support@bombora.com).



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