

Bombora Salesforce app Installation Guide

SFDC V7.3 User Guide

February 2025



bombora[®]

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Overview of Bombora Salesforce app

The Bombora Salesforce app allows users to embed customer Intent data directly into the account and lead records in Salesforce CRM. By selecting key search topics and creating meaningful Intent clusters, your sales and marketing teams will be able to see exactly which prospects and customers are in the market for the products you sell.

This guide will walk you through the installation and key components of the Bombora app. Please reach out to your Bombora Customer Success Manager (CSM) with any questions about the setup, configuration, or how best to incorporate Bombora Intent data into your sales and marketing workflows.

Before you begin, make sure your Bombora account has been created and have your login information on hand. If you do not have a Bombora account, reach out to your CSM to have one set up.

We advise our customers to create a new user profile within your Bombora Account to facilitate your connection to Salesforce. This will ensure that the integration remains accessible and active should a user leave your organization. Additionally, we recommend the same Admin User be created in Salesforce and used to install the Company Surge® for Salesforce integration. This will allow you to make changes to permissions and triggers to facilitate the Bombora data sync without impacting your existing users. For help creating a new Bombora user, please reach out to your Bombora rep or Salesforce Administrator for assistance.

Please note: You must install **two packages** to successfully onboard the application. The managed package installation is available in the Salesforce App Exchange and is linked in the first step of the App installation on page 4 (the next page). The second package is the 'Unlock' package which has a unique link for both sandbox and production environments.

[Unlock Package - Production](#)

[Unlock Package - Sandbox](#)

Note: If you utilize the Salesforce 'My Domain' feature and are installing to your Sandbox, replace 'mydomainname' with your company domain name in the following URL:

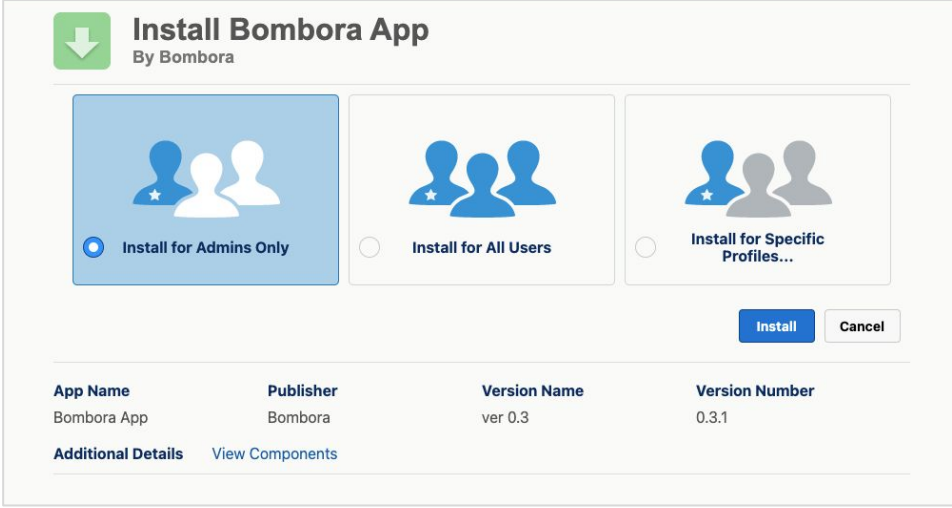
<https://mydomainname.lightning.force.com/packagingSetupUI/ipLanding.app?apvId=04t5b000001iPVNAA2>

Be sure to keep the unlock package installed while utilizing the Salesforce integration.

App installation

Salesforce package installation

- 1 Click the first package [Installation link](#), which will bring you to a Salesforce login page. After entering your username and password, you will see the 'Install Bombora App' page.



Install Bombora App
By Bombora

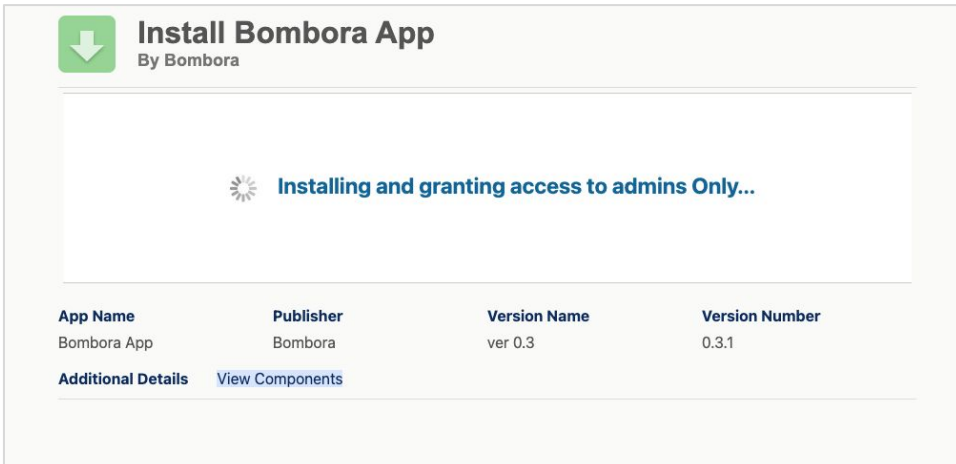
☒ Install for Admins Only ☐ Install for All Users ☐ Install for Specific Profiles...

Install **Cancel**

App Name	Publisher	Version Name	Version Number
Bombora App	Bombora	ver 0.3	0.3.1
Additional Details	View Components		

- 2 Select 'Install for Admins Only' and click 'Install'—installation may take a few moments.

***Clicking 'View Components' will show a list of every new element being added to your Salesforce instance including all custom fields.



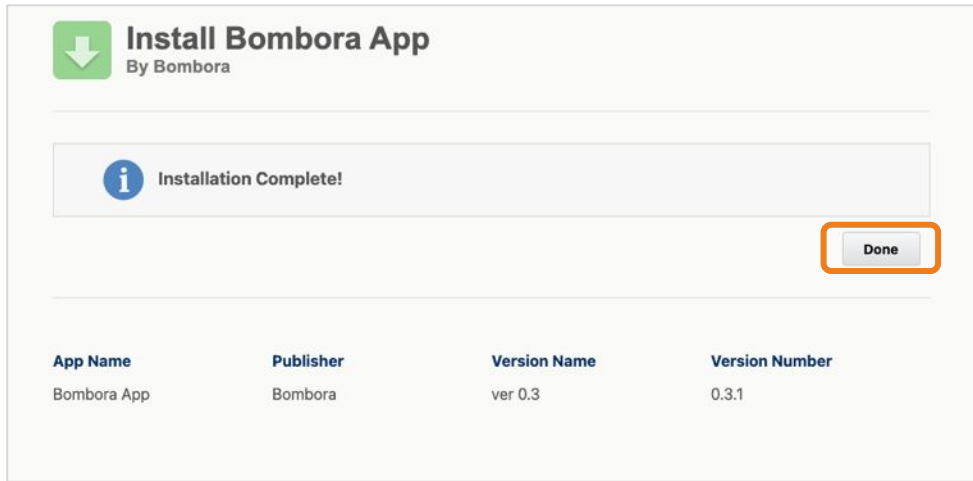
Install Bombora App
By Bombora

Installing and granting access to admins Only...

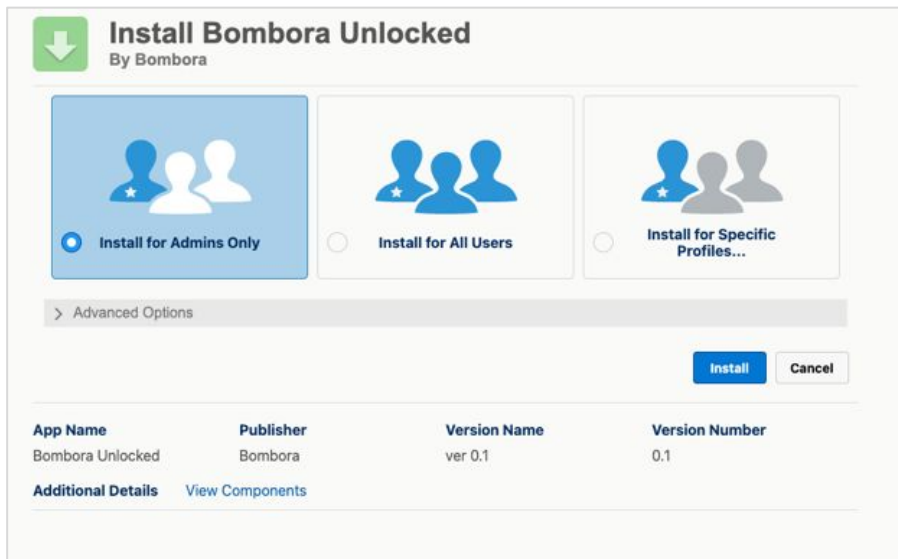
App Name	Publisher	Version Name	Version Number
Bombora App	Bombora	ver 0.3	0.3.1
Additional Details	View Components		

Salesforce package installation (cont.)

- 3 Once installation is complete you will see 'Installation Complete' on the 'Install Bombora app' page. Click 'Done' to proceed.



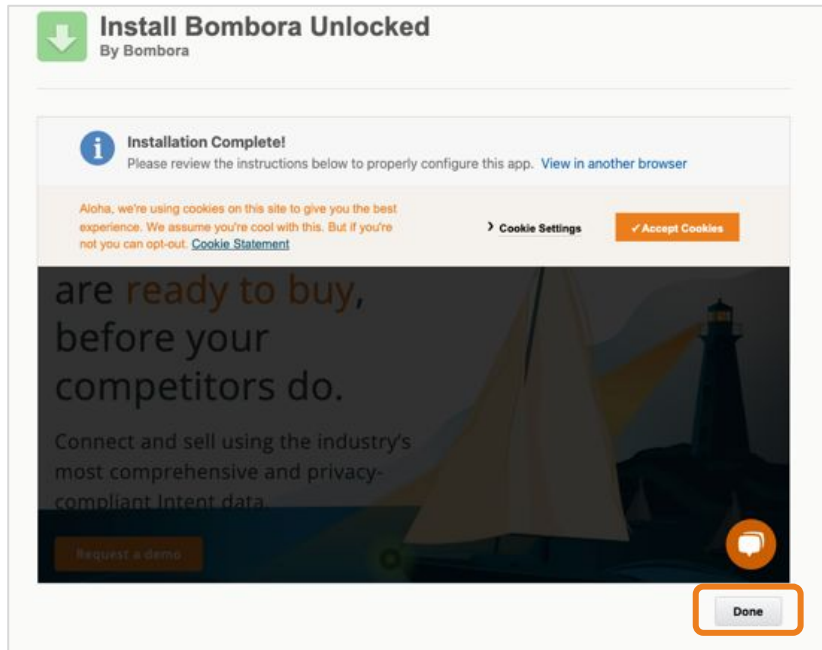
- 4 At this stage all the components of the Bombora App are installed but you will need to install the 'Unlock' package before you're able to activate the integration. Click the second package installation link provided by your Bombora CSM. If you are still logged in or once you are logged in, you will be brought to the 'Install Bombora Unlocked' page. You can confirm you've clicked the correct link if you see 'Bombora Unlocked.'



Salesforce package installation (cont.)

- 5 Once installed, you'll see the confirmation page and can find a link to these installation instructions. Click 'Done' to be redirected to your Salesforce account.

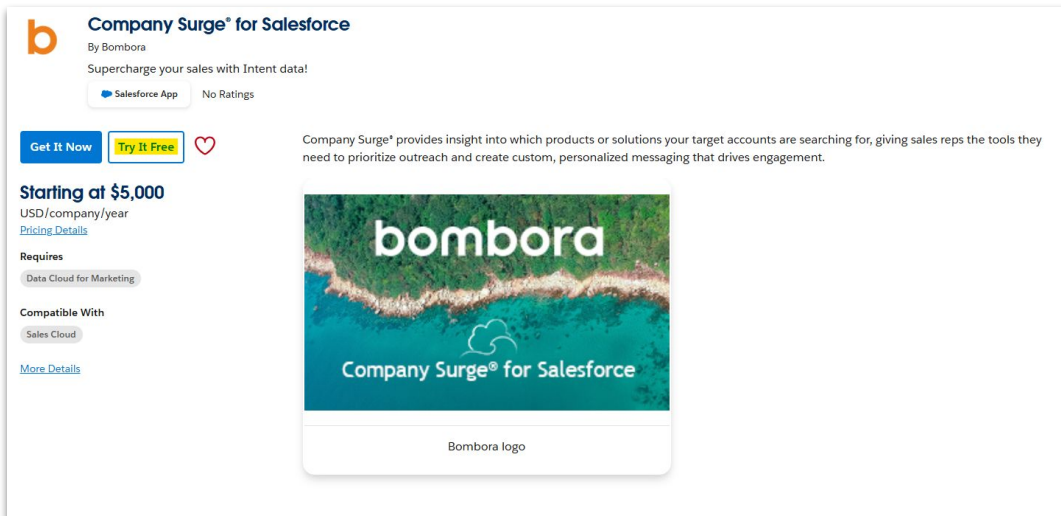
After these two packages are installed, you can continue to configure and authenticate your new Bombora Salesforce app.



Sandbox Installs

Salesforce package installation

- 1 If you are installing in a Sandbox, when you click this [Installation link](#) (from page 4) select Try it Free



- 2 Fill out all fields, and select continue to installation. You will then be able to sign in with your Sandbox credentials and install the package.

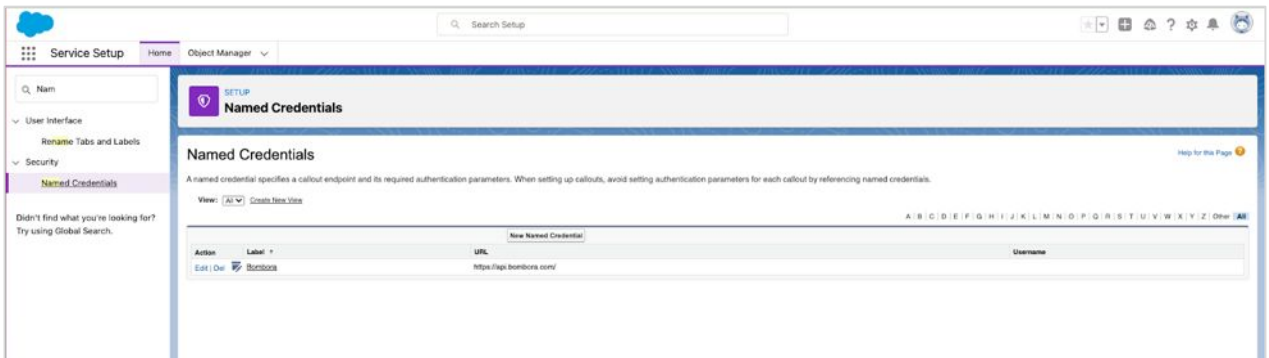
This screenshot shows the installation steps for the Bombora app. Step 1, 'Choose a trial type', offers a 'Try in your sandbox' option with sub-points: 'Test before deploying to production', 'Explore with your data & configurations', and 'Manage installation & setup yourself'. Step 2, 'Share your contact info', requires filling out fields for First Name, Last Name, Company, Email, and Country/Region. It also includes a checkbox for receiving news and updates, and links to the Salesforce Program Agreement and Bombora's Privacy Statement. A 'Continue to Installation' button is visible on the right side of the form.

Validating named credentials

Before you authenticate the application for the first time, please ensure that you have obtained your consumer key & secret so that you can successfully update your authentication provider. If you have not received your key and secret, please submit a [support ticket](#) or contact Bombora support at support@bombora.com.

In order to connect your Bombora and Salesforce accounts you will need to create and validate named credentials within Salesforce for your Bombora account. The second unlock package should help prefill the named credentials but you will need to validate those named credentials with your Bombora account login and password.

1 Navigate to the Setup > Security > Named Credentials



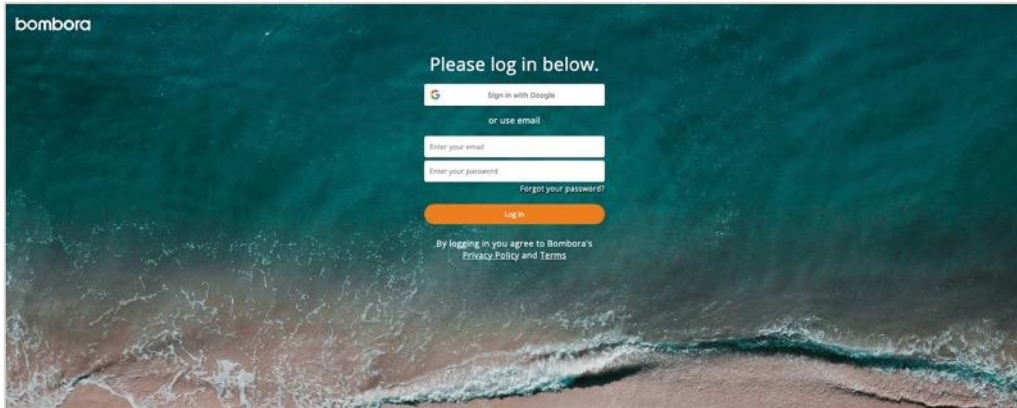
2 Click 'Edit' and ensure the form matches the screen below. Click 'Save' when complete.

A screenshot of the 'Named Credential Edit: Bombora' form in Salesforce. The form contains several fields: 'Label' (Bombora), 'Name' (Bombora), and 'URL' (https://api.bombora.com/). Below these is the 'Authentication' section with fields for 'Certificate', 'Identity Type' (Named Principal), 'Authentication Protocol' (OAuth 2.0), 'Authentication Provider' (Bombora), and 'Scope' (openid offline_access). The 'Authentication Status' is 'Authenticated as auth05d113a8ba2dc5dc9021fb'. At the bottom is the 'Callout Options' section with checkboxes for 'Generate Authorization Header' (checked), 'Allow Merge Fields in HTTP Header' (checked), 'Allow Merge Fields in HTTP Body' (unchecked), and 'Outbound Network Connection'. A red box highlights the 'Save' and 'Cancel' buttons at the bottom right.

Validating named credentials (cont.)

- 3 You will be redirected to the Bombora login page where you can enter your login name and password to validate your credentials. Once you log in, you'll be redirected to the Bombora Admin app.

Note: When you are directed to the Bombora login page, please log in directly using the username name and password fields. Do not use Single Sign-On (SSO) to login.



Authentication of our Salesforce application requires two direct and static sets of login credentials:

1. Bombora UI Account User Credentials
 - a. This user **cannot be created through Google Single Sign One.**
 - b. This user **must be assigned the Bombora Administrator permissions.**
2. Salesforce Admin User Credentials
 - a. This user **must be** assigned a Bombora license (this should be assigned automatically if this user installs the app).
 - b. This user **must be** assigned the Bombora Admin/Integration Access permission set within Salesforce.
 - c. This user **must be directly logged in** to their Salesforce account. SSO is not supported for the integration authentication process.

Please note that if another user logs in as this user, they will not be able to authenticate the app.

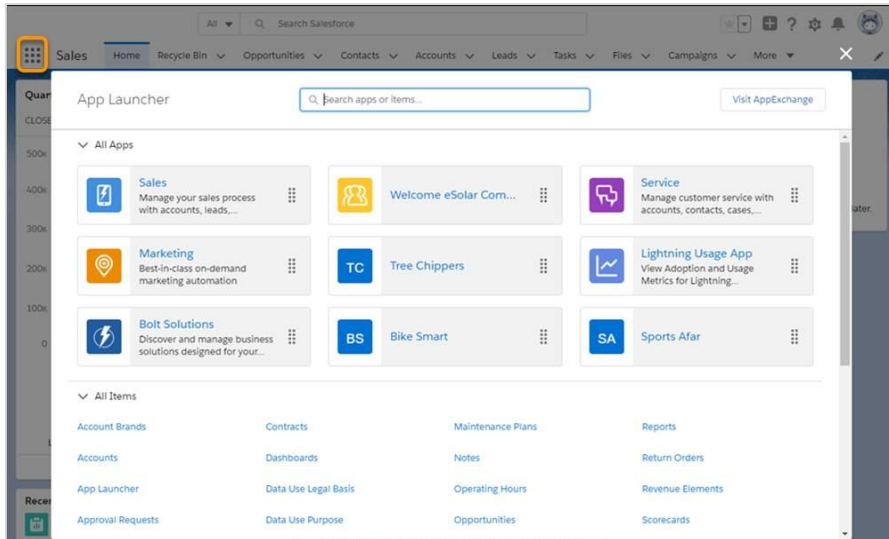
IMPORTANT: It is imperative that a user sign directly into the Salesforce account that your organization will be utilizing for the Salesforce to Bombora connection. **Please do not utilize SSO or log in as another user** as the Salesforce Integration requires the user to be logged in locally (non SSO) for the installation. The initial authentication process should issue a non-expiring token that would be used to validate the authentication for ongoing syncs.

Connecting your Bombora account

Connecting Bombora to your Salesforce account

Now, you're ready to connect your Bombora account and continue with the configuration of your Company Surge® data integration.

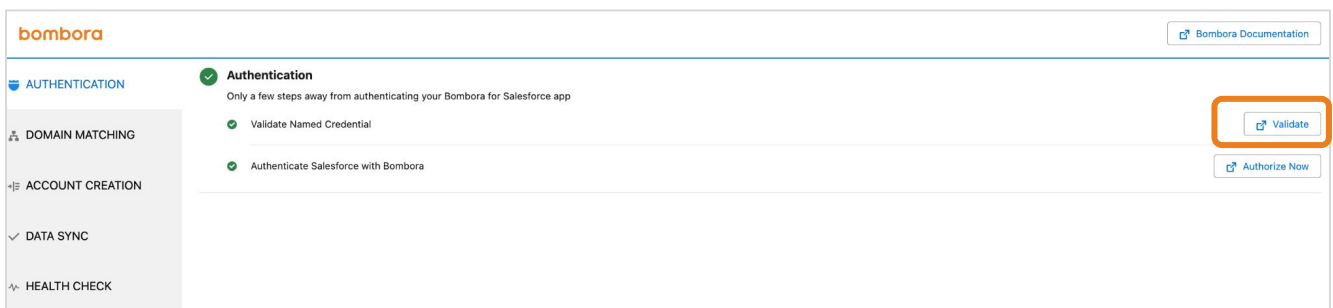
- 1 Navigate to the Bombora Admin app via the Salesforce App Launcher.



- 2 Clicking on the Bombora Admin app will bring you an 'Authentication' page.

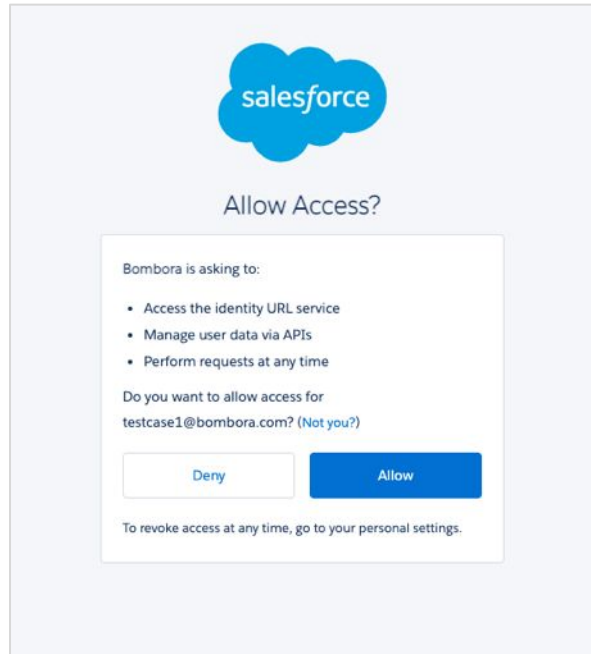
You can check if the 'Validate Named Credentials' step was completed successfully by clicking 'Validate' on the right side of the screen.

- If successful, you will see a green check mark next to 'Validate Named Credentials' on the left side of the screen
- If any error occurs, please screenshot this page and reach out to your Bombora CSM for assistance

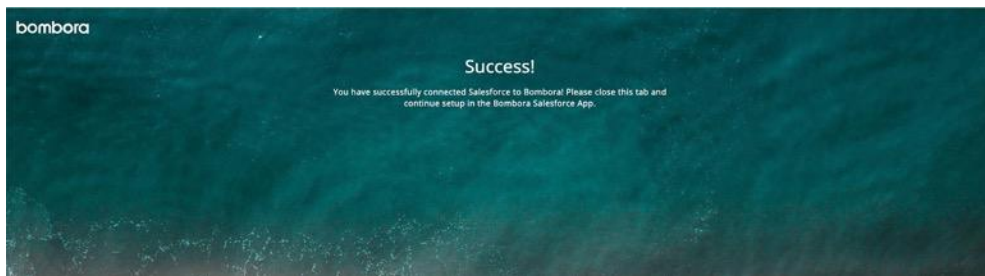


Connecting Bombora to your Salesforce account (cont.)

- Click 'Authorize Now' to connect your Salesforce account to your Bombora account. If you're already logged into your Bombora account, you will see the Salesforce 'Allow Access' page.



- Click 'Allow' and you should see a 'Success' page once the authentication process is complete.







Selecting Topics and Clusters

Now that your Bombora account is connected you will need to identify the right Intent topics for your business. You can find the Topic Cluster tool on the 'Integrations' tab of your Bombora account or by clicking 'Edit Settings' on the Salesforce option. For more information on creating a selecting topics and creating topic clusters, [click here](#).


Connect to a Platform

Get the most from Company Surge® Intent data. Select an integration partner to receive Intent insights directly in the platform where your marketing and sales workflows already live.

 Marketo® Use Intent insights to drive relevant, 1:1 marketing automation at scale. Connect	 LinkedIn Keep your sponsored ad content up-to-date and aligned with your target accounts' interests. Connect	 HubSpot Use Intent insights to drive relevant, 1:1 marketing automation at scale. Connect	 salesforce Prioritize target accounts for sales using intent insights. Connect
----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------


Selecting Topics and Clusters (cont.)


- 1 The 'Salesforce Integration Configuration' page will allow you to select which topics or clusters you'd like to connect to your Salesforce org. During each data sync custom object records are created containing valuable insights related to your selected topics or clusters for all accounts and/or leads that are showing significant interest in topics within each cluster. The selected clusters will also determine whether a net new account will be created through the 'Account Creation' feature within the Bombora Admin app.



Salesforce Integration Configuration

Connection Status
Authentication must be active in both directions for Bombora to properly provide data.

Connected  Authentication from Bombora to Salesforce

Connected  Authentication from Salesforce to Bombora

Select which topic cluster(s) you would like to sync with your Salesforce org
These clusters will be used with your Salesforce records as a target account list and will not use any associated segmentation filters. If you do not see any available selections, you may need to create topic clusters or reach out to Bombora Customer Support for assistance.

Update Settings

Domain matching

The Bombora Salesforce app will extract the account records from your Salesforce instance and append available and relevant Company Surge® data to them during Bombora's weekly syncs. We need to match our records to yours to provide the correct data. The Domain Matching tool allows you to identify up to three (3) URL or email address type fields per object on the account or lead record(s) that best represent a business' website.

- 1 In the section titled 'Account Matching Selection,' all URL or email fields available for match will surface in the box on the right side of the selector. We will check these fields—in the order provided—to match our records. If we do not find a value or match for the first selection, we will attempt to match the second selection, then the third. Click 'Save' when complete.

bombora [Bombora Documentation](#)

DOMAIN MATCHING

Domain Matching

Please specify in order of priority up to three (3) fields that represent website/domain to match an account or lead record to Company Surge® data. Bombora matches the associated Company Surge® data to the first non-blank field.

The "Account Fields" or "Lead Fields" shown are "URL" or "Email" fields that the integration has access to on the respective object. If you do not see a field listed, first ensure its type is "URL" or "Email", and then confirm the integration user has access to that field.

Account Matching Selection

Account Fields

Selected Fields (by Priority)

website

Lead Matching Selection

Enable Lead Matching? ☒ Active

Lead Fields

Selected Fields (by Priority)

website

email

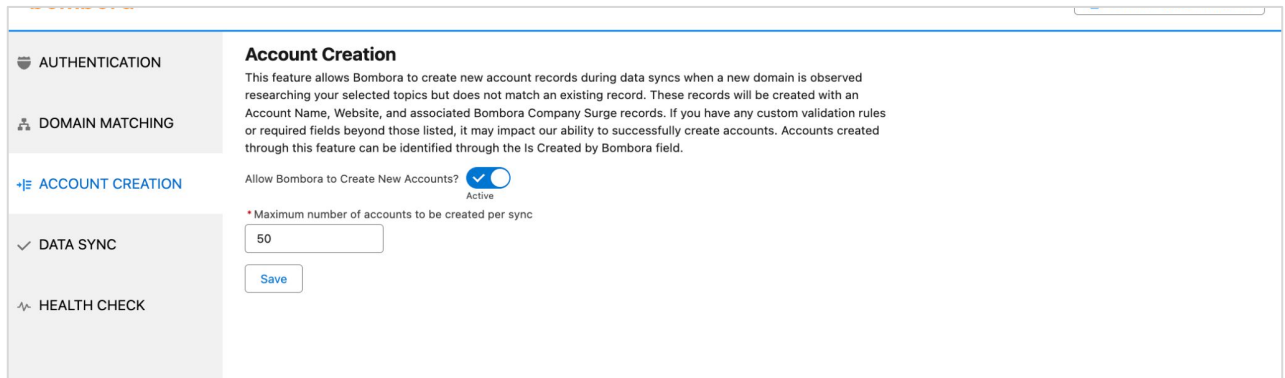
Save

- 2 To match against your lead records, you can repeat the field selection process in the 'Lead Matching Selection' section.

Account creation

Account creation allows Bombora to create new account records automatically when a new domain is observed researching your selected topics but does not match an existing record(s).

- 1 Enabling this feature will allow Bombora to check new records during our weekend sync.



The screenshot shows the Bombora settings interface. On the left is a sidebar with navigation links: AUTHENTICATION, DOMAIN MATCHING, ACCOUNT CREATION (highlighted with a blue bar), DATA SYNC, and HEALTH CHECK. The main content area is titled 'Account Creation' and contains the following text: 'This feature allows Bombora to create new account records during data syncs when a new domain is observed researching your selected topics but does not match an existing record. These records will be created with an Account Name, Website, and associated Bombora Company Surge records. If you have any custom validation rules or required fields beyond those listed, it may impact our ability to successfully create accounts. Accounts created through this feature can be identified through the Is Created by Bombora field.' Below this text is a toggle switch for 'Allow Bombora to Create New Accounts?' which is currently turned on and labeled 'Active'. Underneath the toggle is a label '*Maximum number of accounts to be created per sync:' followed by a text input field containing the number '50'. A 'Save' button is located at the bottom of the input field.

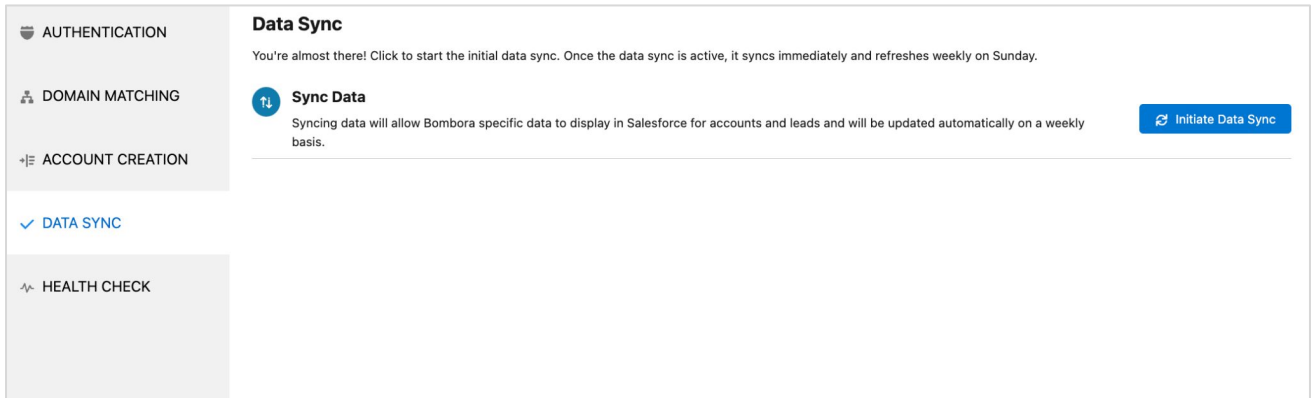
- 2 A limit can be set on the number of records created weekly. If more new records are available than the maximum set, we will create records with the highest Company Surge Signal® scores first.

NOTE: ICP criterion and filtering are not supported in the initial release of this application. Additional governance for account creation will be available in subsequent releases.

Data sync

Once you've connected your Bombora account, selected the topics you'd like to monitor, and identified how to match our records against yours, you're ready to initiate your data sync.

- 1 Click 'Initiate Data Sync' —this will update your records with available Company Surge® data based on the topics you've selected. Our data is curated weekly and clicking this button will use the most recent data available from the previous weekend's Company Surge® report.



DATA SYNC

Data Sync

You're almost there! Click to start the initial data sync. Once the data sync is active, it syncs immediately and refreshes weekly on Sunday.

Sync Data

Syncing data will allow Bombora specific data to display in Salesforce for accounts and leads and will be updated automatically on a weekly basis.

[Initiate Data Sync](#)

- 2 If you've recently made changes to your Signals and would like to see the available data appended to your records, you can initiate a data sync at any time. Data will be automatically refreshed and updated every weekend.

Please work with your Bombora CSM if you plan to make any significant changes and for best practices when updating Intent topics or Signals.

Health Check

This section will highlight the Health Check feature and instruct users to confirm a successful sync 24hrs after clicking ‘Initiate Sync’.

1 This section of the Bombora Admin app is designed to show details on each data sync attempted with your Salesforce instance. Additional information can be found in the app itself, but after initiating your first data sync you can confirm the success of that sync in the Health Check tab. Each sync is broken into a handful of features so that it is easier to determine where any configuration issues may need to be addressed. The ‘Status Details’ field will contain various Salesforce system messages captured during a sync attempt and may help determine why a given feature may fail. Most common issues revolve around custom validation rules that conflict with Bombora’s ability to create new records or save updates. For example: If a Billing Address is required for all new accounts created in your org, you may see a message within the ‘Status Details’ column denoting a missing field value (Billing Address) for the Net New feature.

bombora

[Bombora Documentation](#)

AUTHENTICATION

DOMAIN MATCHING

ACCOUNT CREATION

DATA SYNC

HEALTH CHECK

Health Check

Each Bombora data sync is broken into its primary features to help triage individual issues as they may arise. Below is a list of the most recent completed sync features.

As of V7 the following features are tracked — please keep in mind not all features will have values for each field:

- **Surge Data**, which is the import/update/deletion of records into Bombora Company Surge® object.
- **Net New**, which is the Account Creation feature enabled through the Bombora Admin App.
- **Aggregation**, which is the update of Bombora custom fields available on Account and Lead objects.

Further field descriptions can be found in the object manager.

Last Sync: Oct 28, 2023, 09:54 AM CDT

<input type="checkbox"/>	Name	Surge...	Dom...	Sync ...	Surge...	Status	Statu...	Sync ...	Sync ...	Reco...	Reco...	Reco...
<input type="checkbox"/>	91480 - N...	0.00%		Oct 28, 2...	Oct 27, 20...	Success		Net New	Bombora	249	0	2
<input type="checkbox"/>	91480 - A...	0.00%		Oct 28, 2...	Oct 27, 20...	Success		Aggregati...	Bombora	0	0	941
<input type="checkbox"/>	91480 - S...	98.528%		Oct 28, 2...	Oct 27, 20...	Success		Surge Data	Bombora	129	201	3299
<input type="checkbox"/>	91480 - S...	98.335%		Oct 21, 20...	Oct 20, 2...	Success		Surge Data	Bombora	206	154	3095
<input type="checkbox"/>	91480 - N...	0.00%		Oct 21, 20...	Oct 20, 2...	Success		Net New	Bombora	250	0	2
<input type="checkbox"/>	91480 - A...	0.00%		Oct 21, 20...	Oct 20, 2...	Success		Aggregati...	Bombora	0	0	885
<input type="checkbox"/>	91480 - A...	0.00%		Oct 14, 20...	Oct 13, 20...	Success		Aggregati...	Bombora	0	0	845
<input type="checkbox"/>	91480 - N...	0.00%		Oct 14, 20...	Oct 13, 20...	Success		Net New	Bombora	250	0	2
<input type="checkbox"/>	91480 - S...	98.825%		Oct 14, 20...	Oct 13, 20...	Success		Surge Data	Bombora	261	159	2788
<input type="checkbox"/>	91480 - S...	97.878%		Oct 08, 2...	Oct 06, 2...	Success		Surge Data	Bombora	279	315	2470

[View All](#)

2 Please reach out to your Bombora CSM if you do not see a successful sync within 24hrs or you see an error that your Salesforce admin is unfamiliar with in the ‘Status Details’ column.

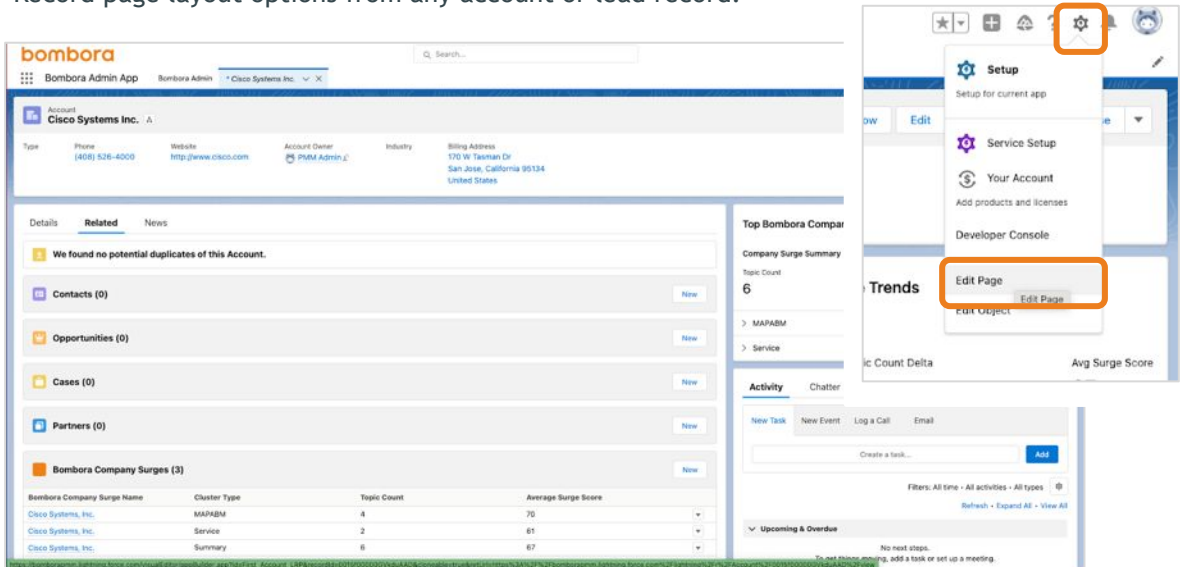
3 This tab displays the last 10 syncs attempted but more records can be found by clicking ‘View All’.

Embedding Bombora data into your Salesforce records

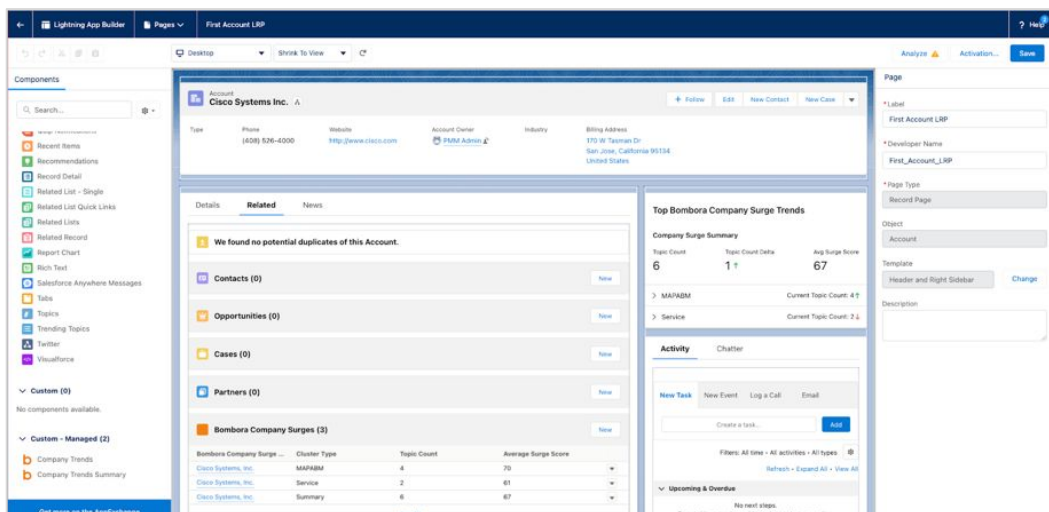
Updating account lightning record page layouts

The Bombora app curates Intent data into an easy-to-implement lightning web component that can be added to the Account and Lead page layouts. We recommend placing the widget in the upper right-hand corner of the account (or lead) object page layout.

- 1 Click the 'Gear' icon in the top right-hand corner and select 'Edit Page' to bring up the Lightning Record page layout options from any account or lead record.



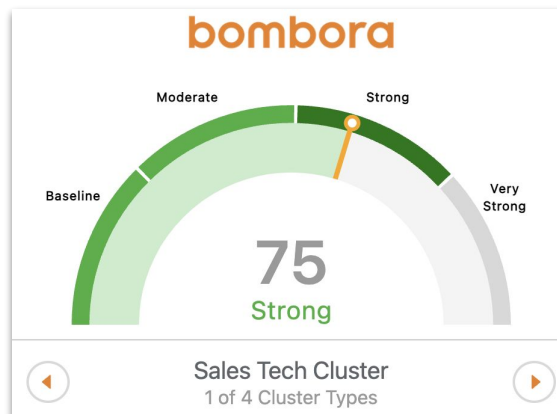
- 2 From the page layout screen, you can find the Bombora widgets under 'Custom - Managed.'



Updating account lightning record page layouts (cont.)

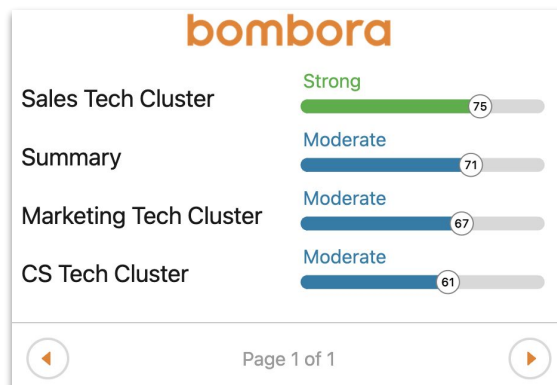
- 3 There are two widget options available to display Bombora Company Surge intent data: 'Intent Score Widget' and 'Intent Summary Widget' which can be dragged and dropped as inline or right-side rail elements.

The Intent Score widget is an easy to read carousel of each Topic Cluster that a given Account or Lead is showing activity within, their Intent Score, and Intent Strength.



Intent Score Widget

- 4 The 'Intent Summary Widget' shows the same information but without the visual gauge and allows you to see scores across multiple Topic Clusters an Account or Lead is showing activity within, ranked by score.



Intent Summary Score Widget

IMPORTANT: There are 2 additional Bombora widgets that are from a previous version of Bombora's Salesforce application and **should not be used** in conjunction with Bombora Salesforce app v7.3.

Updating account lightning record page layouts (cont.)

- 4 The Company Surge® data object shows cluster name, Intent score strength, and Intent score in a list-view and can be applied to the page layout of an Account or Lead record. This object is an aggregated, tabular view of the Intent score and Intent score summary widgets. Each record can be drilled into, displaying additional details about the cluster.

Bombora Company Surges (3)

New

Bombora Company Surge Name	Domain	Cluster Type	Topic Count	
ACK	beeb.net	Sales Tech Cluster	1	▼
ACK	beeb.net	Summary	5	▼
ACK	beeb.net	CS Tech Cluster	4	▼

View All

List View

Related

Details

Bombora Company Surge Name	
AcmeCorp	
Domain	
AcmeCorp.com	
Cluster Type	
Summary	
Topic Count	
5	
Topic Data	
Weekly Topic Count Delta	
-2	
Intent Score	
69	
Intent Score Strength	
Weekly Intent Score Delta	
5	
Account	
AcmeCorp	
Lead	
Bombora External ID	
001Hp00003 AS_Summary	
Created By	
Drew Hann, 1/4/2025, 1:17 PM	

Details (Drill Down)

Licenses and permission sets

V0.6.3 While Bombora's License for Salesforce controls the visibility of components within Bombora's managed package, enabling the proper permission sets is vital. By default, all Salesforce users should be given Bombora standard permission sets (available in version 6.0 or later) if they will need to perform standard Salesforce actions like converting leads and merging accounts. In order for users to then interact with Bombora data, they will also need a Bombora license.

Below are examples of Licenses/Permission Set combinations. Please reference this section for possible scenarios and recommended best practices about how to handle them.

Note: These scenarios assume that a Salesforce Admin has enabled the Bombora custom widget, related list, and custom fields for a user's page layout.

Scenario 1 (Best Practice): A user has been issued a Bombora license and has been assigned the 'Bombora Standard User Access' permission set

User Experience:

- Ability to see any Bombora components added to their page layout and the data within them
- Ability to edit data directly through actions like lead conversion, merging accounts, report creation, etc.
- Ability to create and view reports, dashboards, and list views using Bombora data

The screenshot displays the Salesforce interface for the 'Permission Tests Inc' account. The top navigation bar includes standard Salesforce tabs like Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, Groups, Calendar, People, Cases, and Forecasts. The account details section shows fields for Type, Phone, Website (www.google.com), Account Owner (Tester Permissions), Industry, and Billing Address. The 'Details' tab is active, showing account information and a 'Related' section. The 'Account Intent' section displays 'Average Surge Score Summary' and 'Topic Count Summary'. The 'Additional Information' section includes 'Strongest Intent Cluster' and 'Strongest Cluster - Topic Count'. The 'Address Information' section shows 'Billing Address' and 'Shipping Address'. On the right, the 'Top Bombora Company Surge Trends' section displays a table with columns for Topic Count, Topic Count Delta, and Avg Surge Score. The table shows data for Product C, Product B, Product A, and Competitors. Below this, the 'Intent by Cluster on This Account' section displays a message: 'We can't draw this chart because there is no data.'

Topic Count	Topic Count Delta	Avg Surge Score
19	5 ↓	69
Product C		Current Topic Count: 7 ↓
Product B		Current Topic Count: 5 ↑
Product A		Current Topic Count: 5
Competitors		Current Topic Count: 2 ↓

Licenses and permission sets (cont.)

Scenario 2: A user has *NOT* been issued a Bombora license but has been assigned a permission set

NOTE: This scenario is recommended for all non-licensed users

User Experience:

- Inability to see any data within the Bombora components but will be able to indirectly edit the underlying Bombora data
- Inability to see or build reports that include Bombora data

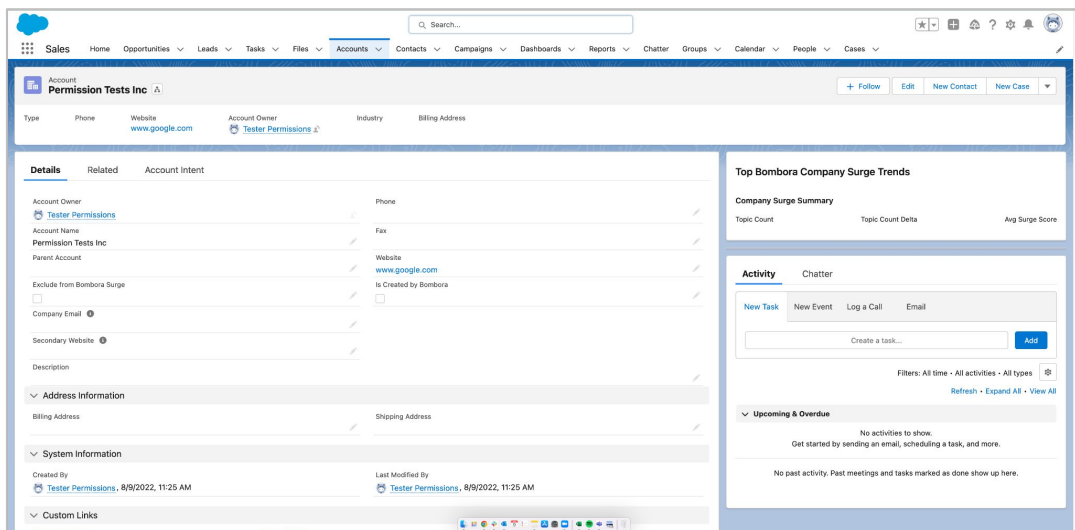
Scenario 3: A user has been issued a Bombora license but has not been assigned a permission set

User Experience:

- Ability to see the Bombora components on their page layout but not the data within those components
- Inability to edit Bombora data directly or indirectly

Examples:

- The ‘*Top Bombora Company Surge® Trends*’ widget is visible but no data is shown
- *Exclude from ‘Bombora Surge’* and *‘Is Created by Bombora’* are visible.
- Account fields with Bombora data are **not visible** like: ‘*Topic Count Summary*’, ‘*Average Surge Score Summary*’, ‘*Strongest Intent Cluster*’, and ‘*Strongest Cluster - Topic Count*’

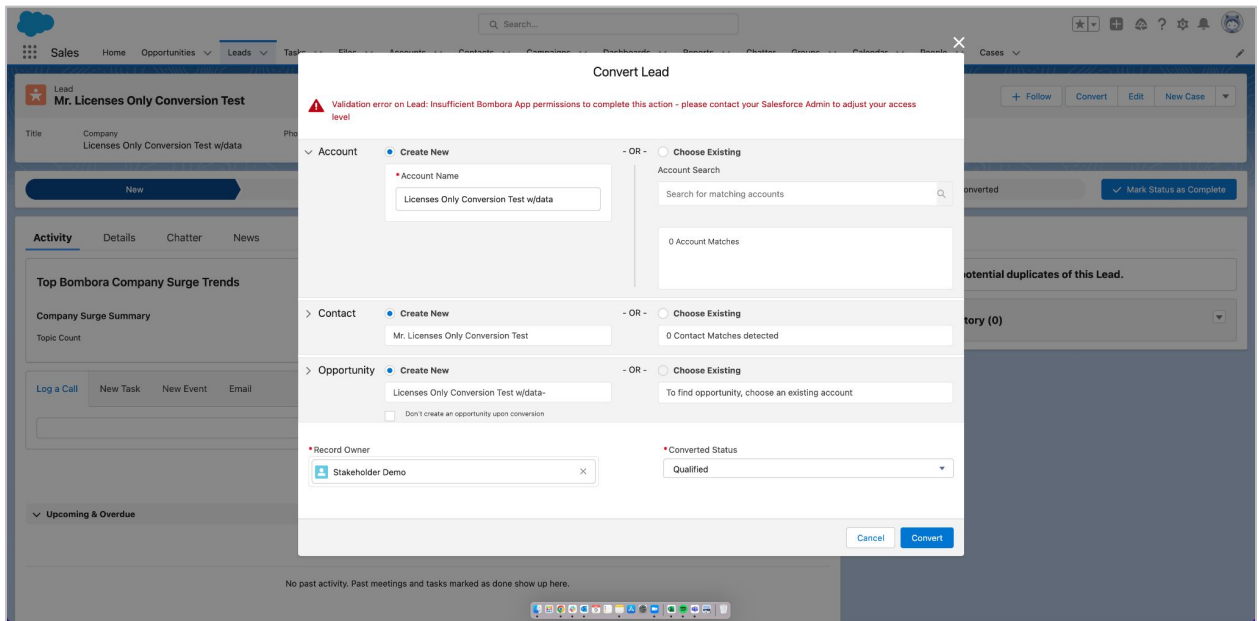


Note: Mentions of ‘Surge’ refers to Bombora’s Company Surge®

Licenses and permission sets (cont.)

Without any permissions assigned, this user would not be able to edit Bombora data directly or indirectly.

If a user who is not assigned a permission set attempts to convert a lead record into an account or opportunity - even if they have been assigned licensed - will receive an error message as highlighted in the screenshot below:



Assigning the 'Bombora Standard User' permissions set to this user will enable them to process this data, directly or indirectly, and complete dependent actions such as lead conversion.

NOTE: If a user's experience meets the conditions set in scenario 3, we strongly recommend assigning a permission set to ensure a baseline level of functionality.

Permission set assignments

When assigning users, Admins will choose from three permissions sets:

1. **Bombora Admin/integration Access.** Full access to Bombora data and access to the Bombora Admin app. This is the default permission set assigned to the Salesforce Admin that installs the application.

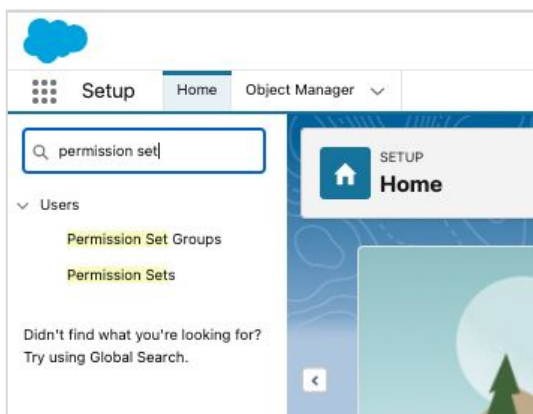
NOTE: Unless you downloaded the app yourself, you will need your Systems Administrator to grant access to the Bombora Admin app as needed, by adding users to the corresponding installed package.

V0.6.3

2. **Bombora Standard.** Full access to Bombora data, including standard operations like Lead conversion and Account creation which may interact with Bombora functionality. Should be the primary permission set for day to day Salesforce users. No access to the Bombora Admin app.
2. **Bombora Read Access.** Read access only to Bombora data. This user will not be able to edit Bombora data directly or indirectly and should only be used if a user does not need to perform standard operations like Lead conversion or Account creation.

NOTE: Each user must be assigned a permission set to access the data

- 1 To assign permissions to a user profile, navigate to 'Setup', type 'Permission Set' into your search bar and select 'Permission Set' under 'Users'.



Permission set assignments (cont.)

- Next, you will need to select the permission set label that aligns with the user roles you wish to assign. In the table, you will see ‘Bombora Admin/Integration Access’ and ‘Bombora Read Access’.

Permission Sets

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

In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play: [iOS](#) | [Android](#)

All | **Edit** | **Delete** | **Create New View**

New | **+**

Action	Permission Set Label	Description	License
<input type="checkbox"/> Clone	ActionPlans		Action Plans
<input type="checkbox"/> Clone	Analytics View Only User	User permissions for View-only licensed apps.	Analytics View Only Embedded App
<input type="checkbox"/> Clone	Bombora Admin/Integration Access		
<input type="checkbox"/> Clone	Bombora Read Access		

- Next, select ‘Manage Assignments’.

SETUP | **Permission Sets**

Permission Set
Bombora Admin/Integration Access

Find Settings... | **Clone** | **Manage Assignments**

Permission Set Overview

Description:
License:
Session Activation Required: ☐
Last Modified By: Sales Engineer: 3/22/2022, 3:15 PM

API Name: Bombora_Admin_Integration_Access
Namespace Prefix: bombora_data
Created By: Sales Engineer: 2/7/2022, 1:21 PM

- Select your users and click ‘Add Assignments’. You will be prompted with a pop window to verify the action. Click ‘Ok’ to complete.

SETUP | **Permission Sets**

Assigned Users
Bombora Admin/Integration Access

Back to: Permission Set

Add Assignments | **Remove Assignments**

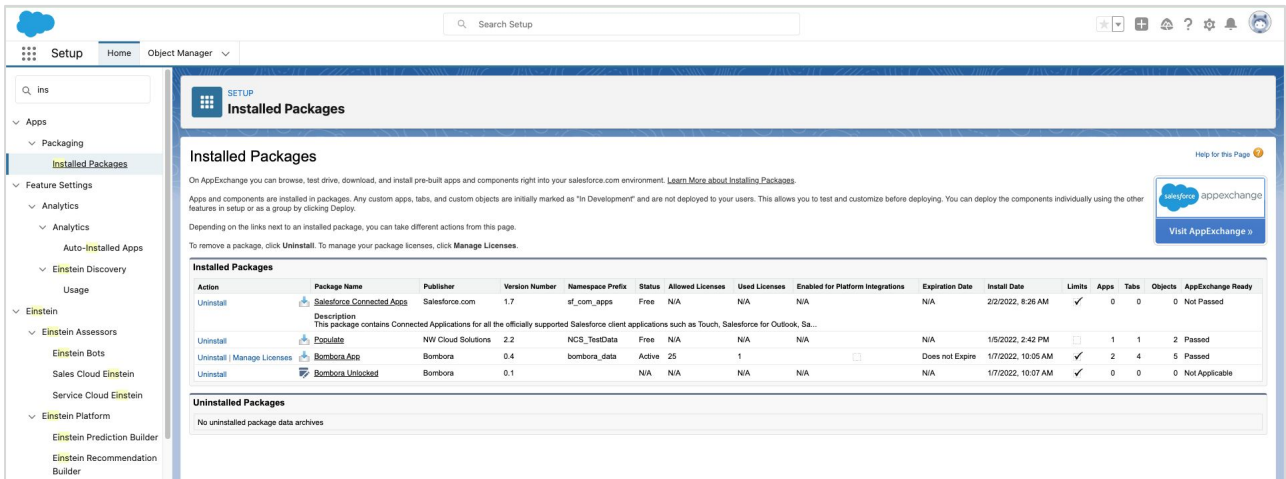
Action	Full Name	Alias	Role	Active	Profile	Expires On
<input type="checkbox"/> Edit	Demo User_A0	ademo	ademo@bombora.com	✓	System Administrator	
<input type="checkbox"/> Edit	Demo User_A1	A1Demo	ademo@bombora.com	✓	System Administrator	
<input type="checkbox"/> Edit	Ernestine_Sales	SErnst	erestine@bombora.com	✓	System Administrator	
<input type="checkbox"/> Edit	Houlihan, Charles	chouli	chouli@bombora.com	✓	System Administrator	
<input type="checkbox"/> Edit	Molina, Diego	dmol	dmolina@bombora.com	✓	System Administrator	

Add Assignments | **Remove Assignments**

Repeat this step if you have additional users that need to be assigned to the other permissions set.

License management

1 From Salesforce, navigate to 'Setup' > 'Installed Packages'



Installed Packages

On AppExchange you can browse, test drive, download, and install pre-built apps and components right into your Salesforce.com environment. [Learn More about Installing Packages](#).

Apps and components are installed in packages. Any custom apps, tabs, and custom objects are initially marked as "In Development" and are not deployed to your users. This allows you to test and customize before deploying. You can deploy the components individually using the other features in setup or as a group by clicking Deploy.

Depending on the links next to an installed package, you can take different actions from this page.

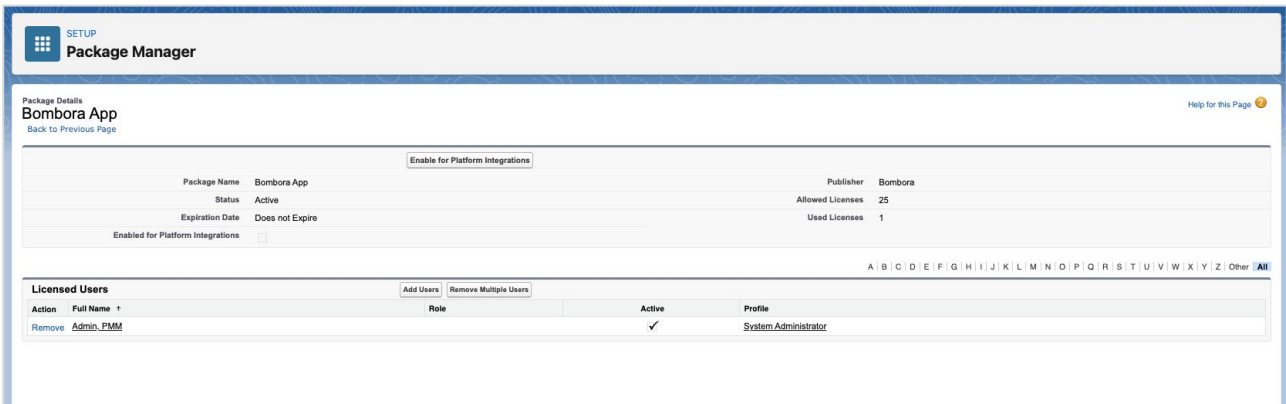
To remove a package, click **Uninstall**. To manage your package licenses, click **Manage Licenses**.

Action	Package Name	Publisher	Version Number	Namespace Prefix	Status	Allowed Licenses	Used Licenses	Enabled for Platform Integrations	Expiration Date	Install Date	Limits	Apps	Tabs	Objects	AppExchange Ready
Uninstall	Salesforce Connected App	Salesforce.com	1.7	sf_com_apps	Free	N/A	N/A	N/A	N/A	2/2/2022, 8:26 AM	✓	0	0	0	Not Passed
Uninstall	Populate	NW Cloud Solutions	2.2	NCS_TestData	Free	N/A	N/A	N/A	N/A	1/5/2022, 2:42 PM	✓	1	1	2	Passed
Uninstall Manage Licenses	Bombora App	Bombora	0.4	bombora_data	Active	25	1	<input type="checkbox"/>	Does not Expire	1/7/2022, 10:05 AM	✓	2	4	5	Passed
Uninstall	Bombora Unlocked	Bombora	0.1		N/A	N/A	N/A	N/A	N/A	1/7/2022, 10:07 AM	✓	0	0	0	Not Applicable

Uninstalled Packages

No uninstalled package data archives

2 In the 'Installed Packages' table, select 'Managed Licenses' next to the Bombora App



Package Details

Bombora App

[Back to Previous Page](#)

[Enable for Platform Integrations](#)

Package Name	Bombora App	Publisher	Bombora
Status	Active	Allowed Licenses	25
Expiration Date	Does not Expire	Used Licenses	1
Enabled for Platform Integrations	<input checked="" type="checkbox"/>		

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

Licensed Users

[Add Users](#) [Remove Multiple Users](#)

Action	Full Name ↑	Role	Active	Profile
Remove	Admin_PMM		✓	System Administrator

For more information on how to allocate licenses for installed packages in Salesforce, please [click here](#).

Note: Each user set must be allocated a license and assigned a permission set to access the data.

Excluding records from Bombora data

Bombora’s data integration will automatically extract all account and lead records within your Salesforce instance to match against Company Surge® data. There may be instances where you do not want or need Company Surge® data to be appended to specific records.

If you want to exclude a record from the Data Matching process, you can set the ‘Exclude from Bombora Surge’ flag to ‘true’ on any account or lead record. Please work with your Bombora CSM for best practices on excluding records and highlighting the accounts you’d like Bombora to focus on.

Account

Cisco Systems Inc.

Type	Phone	Website	Account Owner	Industry	Billing Address
	(408) 526-4000	http://www.cisco.com	PMM Admin		170 W Tasman Dr San Jose, California 95134 United States

Details

Related

News

Account Owner	Phone
PMM Admin	(408) 526-4000
Account Name	Fax
Cisco Systems Inc.	
Parent Account	Website
	http://www.cisco.com
Data Provider Account URL	Bombora External ID
Customer Service Email	Exclude from Bombora Surge
	<input type="checkbox"/>
Social URL	Total Active Topic Count

Note: Mentions of ‘Surge’ refers to Bombora’s Company Surge®



Bombora Company Surge® for Salesforce 2.0 FAQs

Overview

General FAQs:

This section is for customers who are installing Bombora Company Surge® for Salesforce for the first time. All new customer integrations are enabled on the latest version of our new application - Salesforce 2.0.

1 Where can I learn more about the new Bombora Company Surge® for Salesforce 2.0 app?

Bombora's [Customer Resource Center](#) has everything you need to know about getting started with Salesforce 2.0

2 Which editions of Salesforce are supported by the new app?

- The new Salesforce integration will support Salesforce Enterprise Edition or above, including Salesforce Classic. If you are using Salesforce Professional, you will need to ensure that you have API access enabled. Salesforce Essentials is not supported at this time.
- For Salesforce Classic, the widgets mentioned in the installation guide may be affected or unusable in Salesforce Classic, but reporting, dashboards and the account level fields should all be usable.

3 Is there a limit to the number of Salesforce users that can access the Bombora Intent data in Salesforce?

- Yes, Bombora's managed package uses a seat-based licensing model to govern who has access to the features of the Salesforce integration.
 - By default, you will have 50 seats that can be allocated to end users in your salesforce org.
 - Additional seat licenses can be added based on your contract. Please contact your CSM for additional information.
- You can allocate licenses to end users by going into 'Setup' -> 'Installed Packages' -> 'Bombora' -> 'Manage Licenses'

Bombora Company Surge® for Salesforce 2.0 FAQs

Overview

4 Is there a way to limit what access my end users will have to Bombora data in our Salesforce?

- Yes, you can govern end users' access to Bombora data within your org via permission sets included in the managed package.
- The managed package includes 3 permission sets with different levels of access:
 - o 'Bombora Admin/integration Access'
 1. Full read/write access to Bombora data and access to the 'Bombora Admin app'.
 2. This permission should only be assigned to Salesforce Administrators.
 3. This is the default permission set assigned to the Salesforce Admin that installs the managed package.
 - o 'Bombora Standard Access'
 1. Full access to Bombora data, including standard operations like Lead conversion and Account creation which may interact with Bombora functionality. No access to the 'Bombora Admin App'.
 2. Should be the primary permission set for day-to-day Salesforce users.
 - o 'Bombora Read Access'
 1. Read access only to Bombora data. This user will not be able to edit Bombora data directly or indirectly and should only be used if a user does not need to perform standard operations like Lead conversion or Account creation.
- Each user must be assigned a permission set to access the data.

Bombora Company Surge® for Salesforce 2.0 FAQs

Installation

1 Who can add/delete/change Signals for the Salesforce Integration? Does it have to be our Salesforce Admin?

No, it does not need to be your Salesforce Admin. Anyone who has Admin permission sets in the Bombora UI can add/delete/change Signals for the Salesforce Integration. Any changes to Signals can be made in the [Signal Creator](#).

2 I'm seeing an 'Apex compile error' when trying to install the Bombora Unlocked package - what should I do?

- By default, the package installation process attempts to compile the custom code in your Salesforce instance. If you have a lot of custom code the process could expose issues in your code and halt the installation with an error message that references an 'Apex compile failure.'
 - Therefore, if you see this error, please attempt to install the package using the 'Compile only the Apex in package.' option found in the Advanced Options drop down on the install page.
-

Bombora Company Surge® for Salesforce 2.0 FAQs

About the data

1 Who is able to do a manual sync for Bombora data?

Anyone who is given ‘Bombora Integration Admin Permissions’ is able to access the Bombora App and manually sync Bombora data.

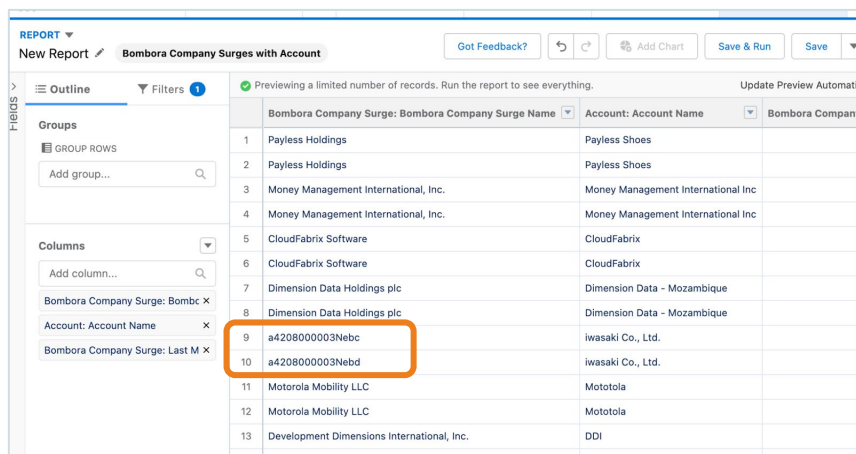
2 Is there any way for a client to see historical data and ‘surge’ activity saved into reporting?

It’s not something supported out of the box but can be achieved to an extent through field history tracking, but we would recommend using Market Insights to interact with historical Company Surge® data.

3 Why is the Bombora ‘Surge Name’ different than the Account Name field in Salesforce?

The field ‘Bombora Company Surge® Name’ denotes the business name that Bombora stores in its Company Surge® database. Company Surge® uses the domain field to map the Salesforce record to the profile showing Intent.

If Bombora does not have a business name associated with a domain you may see the Account ID value displayed in the ‘Bombora Surge Name’ field.



	Bombora Company Surge: Bombora Company Surge Name	Account: Account Name	Bombora Company
1	Payless Holdings	Payless Shoes	
2	Payless Holdings	Payless Shoes	
3	Money Management International, Inc.	Money Management International Inc	
4	Money Management International, Inc.	Money Management International Inc	
5	CloudFabrix Software	CloudFabrix	
6	CloudFabrix Software	CloudFabrix	
7	Dimension Data Holdings plc	Dimension Data - Mozambique	
8	Dimension Data Holdings plc	Dimension Data - Mozambique	
9	a420800003Nebc	iwasaki Co., Ltd.	
10	a420800003Nebd	iwasaki Co., Ltd.	
11	Motorola Mobility LLC	Mototola	
12	Motorola Mobility LLC	Mototola	
13	Development Dimensions International, Inc.	DDI	

Note: Mentions of ‘Surge’ refers to Bombora’s Company Surge®

Bombora Company Surge® for Salesforce 2.0 FAQs

About the data

- 4 What if our website field(s) contain base URL information (ex: <https://www.bombora.com>)? Will Bombora URL field still recognize our domain value?

Yes. The matching process includes validation logic that will parse out the base domain ([bombora.com](https://www.bombora.com)) from the provided URL.

Surf's up. Let's take off.

For more information, please contact us
at support@bombora.com



bombora[®]

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