

Technical Architecture and Support Documentation

Company Surge® for Salesforce V7.3

User Guide
February 2025



bombora®

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Note: Mentions of 'Surge' refers to Bombora's Company Surge®

Overview of Company Surge® for Salesforce (2.0)

Technical Architecture and Support Documentation

This document outlines the key terms, components and features of Bombora's Salesforce Application and is a supplemental resource to our [installation guide found here](#). Salesforce administrators can use this to reference which custom objects and fields are contained within Bombora's managed package as well as detailed descriptions on how Bombora's data is synced with their Salesforce Accounts and Leads.

If there are questions on anything found within this document please contact your Bombora CSM and cc salesforce@bombora.com

Key terms

The following are a collection of Bombora specific terms that will be referenced within this document and our install guide.

Intent data

This is a broad term used to describe the observable web events that Bombora captures through our 5,000+ website Data Co-op. These individual events are mapped against Bombora's Intent Topic taxonomy and matched to an organization's domain. This allows individuals' web activity to stay anonymous but be compiled and viewed at a business level - allowing Bombora customers to make marketing and sales decisions based on what their prospects are actively researching online.

Bombora Company Surge® score

This is the primary application of Bombora's Intent data - as individuals from a given business research specific topics, that organization's 0-100 score for a topic increases. A score of 60 or above represents a high level of activity and proves worthy of targeted outreach. A business's score, across all topics, is generated each weekend based on the week's research activity.

Intent topics

As mentioned above, Bombora maintains a topic taxonomy that is used to classify various content across the web. These topics include products, services, systems and some business names. Topics are defined by Bombora and updates to our topic taxonomy are made frequently by our data science teams, based on research and customer feedback.

Topic clusters

Clusters refer to a group of like topics which represent a broad area of interest, a product, or a service that a Bombora customer would like to monitor. For example, a marketing tech business like Bombora would create a cluster titled 'Intent Data' that contains topics like: 'Customer Intent,' 'Intent Data,' 'Intent Marketing,' and 'Account-Based Marketing (ABM).' These clusters allow individual topic Company Surge® Scores to be aggregated into an average cluster score and values like 'Topic Count' indicate how many topics within that cluster are showing increased research activity in a given week.

Data sync

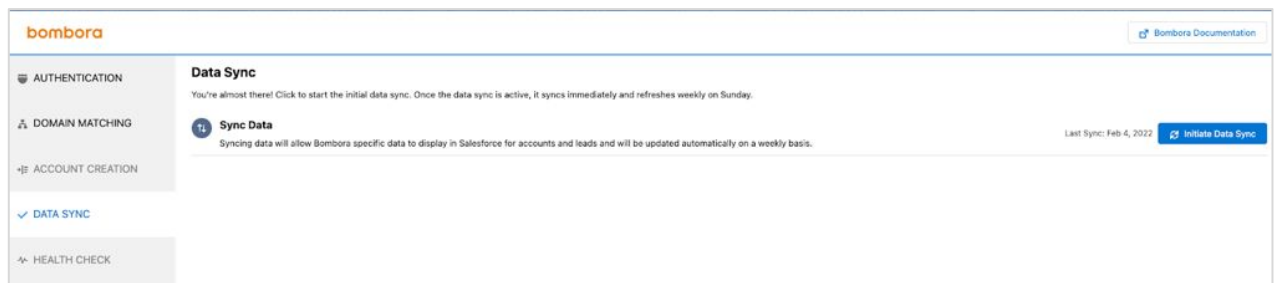
The core feature of Bombora's Salesforce application is to map intent data from Bombora directly to the matched Account and/or Lead records. This occurs by matching available domain data between Bombora and Salesforce. Bombora's Company Surge® data is updated each weekend and an automated sync process between a customer's Salesforce and Bombora instance is kicked off once new data is available. In addition to an automated weekend sync, Bombora customers can initiate a manual sync through Bombora's Admin App that will fetch the most recent week's Company Surge® data. When initiating a manual sync, it's important to note that Salesforce users may see areas of Salesforce impacted during the sync.

'Surge' records

In order for the output of a Bombora Company Surge® Report to be imported into Salesforce, it is organized into records within Bombora's Company Surge® custom object and is associated with account and/or lead records. Each record represents one cluster within a customer's Company Surge® Report that contains at least one topic with a Company Surge® Score of 60 or above as well as one Summary record that contains rollup data from all available cluster records. For example, if there are five clusters within a customer's Company Surge® Report and a given domain is showing interest across all clusters there will be six total records within the Bombora Company Surge® custom object: one for each cluster and one summary record.

Health Check (V7.3)

The Health Check feature within the Bombora Admin App is now available (v7) to our customers' Salesforce Admins. This new tab explains the details of the feature and displays the last 10 records found within the new Bombora Sync Status custom object. Each Sync Status record contains various performance metrics related to our integrations data syncs along with any available error messaging. These records are designed to help Salesforce Admins self-manage common technical issues and see the value of our data.



Note: Mentions of 'Surge' refers to Bombora's Company Surge®

Custom object and custom fields

The following section contains a breakdown of the Bombora Company Surge® custom object and the additional custom fields within Bombora’s managed package that are currently in use.

Bombora Company Surge® - custom object			
Field label	Field name	Data type	Description
Account	bombora_data__Account__c	Lookup(Account)	Allows Surge Records to be associated with Accounts
Intent Score	bombora_data__Account__c	Number(3, 0)	Average Surge Score across topics in a cluster
Bombora Company Surge® Name	Name	Text(80)	Company Name from Bombora Data Set
Bombora External ID	bombora_data__Bombora_External_ID__c	Text(255) (External ID) (Unique Case Insensitive)	Unique record ID to facilitate Bombora data matching
Cluster Type	bombora_data__Cluster_Type__c	Picklist	Whether a record represents a summary or a cluster record
Created By	CreatedById	Lookup(User)	The user associated with the managed package installation. Bombora Admin Integration Permission Set
Domain	bombora_data__Domain__c	Text(255)	The Bombora domain value used in matching data to records
Last Modified Date Time	LastModifiedById	Date/Time	Timestamp for the last record update in Salesforce
Lead	bombora_data__Lead__c	Lookup(Lead)	Allows Surge Records to be associated with Leads
Owner	OwnerId	Lookup(User,Group)	The user associated with the managed package installation. Bombora Admin permission set

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

Bombora Company Surge® - custom object cont'd.

Field label	Field name	Data type	Description
Topic Count	bombora_data_Topic_Count_c	Number(4,0)	Number of topics within a cluster with a Surge score of 60+
Topic Data	bombora_data_Topic_Data_c	Long Text Area(10000)	Comma separated list of topics within each cluster and their associated Surge Scores
Weekly Intent Score Delta	bombora_data_Weekly_Surge_Score_Delta_c	Number(3,0)	The delta between last week's average Surge Score and the current week's average Surge Score.
Weekly Topic Count Delta	bombora_data_Weekly_Topic_Delta_c	Number(4,0)	The delta between last week's topic count and this week's topic count.

Account and lead object - custom fields

Field label	Field name	Data type	Description
Bombora External ID	bombora_data__Bombora_External_ID__c	Text(255) (External ID) (Unique Case Insensitive)	Unique record ID to facilitate Bombora data matching
Exclude from Bombora Surge	bombora_data_Exclude_from_Bombora_Surge_c	Checkbox	Controls whether Bombora will attempt to match data against the record or not
Is Created by Bombora (only on Account object)	bombora_data_Is_Created_by_Bombora_c	Checkbox	Checked is record was created through Bombora's Account Creation feature

Note: Mentions of 'Surge' refers to Bombora's Company Surge®

Custom fields added in V6 of Bombora app

Field label	Field name	Data type	Description
Average Surge Score Summary	bombora_data_Average_Surge_Score_Summary_c	Number(3,0)	Average score of the associated Summary Surge Record
Topic Count Summary	bombora_data_Topic_Count_Summary_c	Number(4,0)	Number of topics with 60+ Surge Score across all clusters. If the same topic exists in multiple clusters it will be counted multiple times
Strongest Intent Cluster	bombora_data_Strongest_Intent_Cluster_c	Text(255)	Cluster with the highest Topic Count excluding Summary Surge record
Strongest Cluster - Topic Count	bombora_data_Strongest_Cluster_Topic_Count_c	Number(4,0)	Topic Count in the cluster identified in the Strongest Intent Cluster field

Custom Fields added in V7.3 and later of Bombora App

Field label	Field name	Data type	Description
Intent Score Strength	bbombora_data__SignalStrength_c	Text(255)	Label assigned to the following bands of signal scores: - 0-49 (Low), 50-59 (Baseline), 60-72 (Moderate), 73-79 (Strong), 80+ (Very Strong) - Scores below 60 are not imported into Salesforce to conserve data storage meaning only Moderate, Strong and Very Strong will be seen within Salesforce
Bombora Sync Status Name *	Name	Text(80)	Number of topics with 60+ Surge Score across all clusters. If the same topic exists in multiple clusters it will be counted multiple times

Note: Mentions of 'Surge' refers to Bombora's Company Surge®

Custom Fields added in V7.3 and later of Bombora App

Field label	Field name	Data type	Description
Created By*	CreatedById	Lookup(User)	Allows Surge Records to be associated with Accounts
Last Modified By*	LastModifiedById	Lookup(User)	
Owner*	OwnerId	Lookup(User,Group)	
Domain Match Rate	bombora_data__Domain-Match_Rate__c	Percent(2, 3)	Percentage of all domains in a customer's data set that match Bombora's data set, regardless of customer clusters or current intent scores.
Feature Stats - Records Added	bombora_data__Feature_Stats_Records_Added__c	Number(18, 0)	Based on the feature, this shows the number of records added. For Surge Data this represents the new Bombora Company Surge records created. For Net New this represents the Account records created.
Feature Stats - Records Removed	bombora_data__Feature_Stats_Records_Removed__c	Number(18, 0)	Based on the feature, this shows the number of records removed. For Surge Data this represents the Bombora Company Surge records that were no longer showing relevant Surge Activity as of this sync.
Feature Stats - Records Updated	bombora_data__Feature_Stats_Records_Updated__c	Number(18, 0)	Based on the feature, this shows the number of records updated. For Surge Data this represents the Bombora Company Surge records that have changed since last sync. For Aggregations this represents the Account/Lead records that had their custom field values updated.
Status	bombora_data__Status__c	Text(255)	This is a short description of any issues that occurred during this feature's execution.

Note: Mentions of 'Surge' refers to Bombora's Company Surge®

Custom Fields added in V7.3 and later of Bombora App

Field label	Field name	Data type	Description
Status Details	bombora_data__Status-Details__c	Long Text Area(32768)	This is a longer description of any issues that occurred during the features execution.
Surge Activity	bombora_data__Surge_Activity__c	Percent(2, 3)	Percentage of valid domains in a customer's data set that are showing intent as of this sync.
Surge Data Date	bombora_data__Surge_Data_Date__c	Date	The date that this Bombora Company Surge data was aggregated. This date can be used to check if the data present in your org is Bombora's most recent.
Sync Date	bombora_data__Sync_Date__c	Date/Time	The timestamp this sync feature completed.
Sync Feature	bombora_data__Sync_Feature__c	Text(80)	Each Bombora data sync is broken into its primary features to help triage individual issues as they may arise. As of V7 the following features are tracked: 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. Not all features will have values for each field.
Sync Origin	bombora_data__Sync_Origin__c	Text(80)	How the sync operation was triggered.
Signal	zzz_bombora_data__Signal__c	Text(255)	Deprecated field - do not use.

For log files or activity related to this application, please reference this [help article](#) for more information.

Note: Mentions of 'Surge' refers to Bombora's Company Surge®

Field Changes: v7.3

With the release of Company Surge® for Salesforce v7.3, there are a few field changes to be aware of:

New Fields

Intent Score Strength: This is the label given to the following bands of Intent Scores:

- 0-49 (Low), 50-59 (Baseline), 60-72 (Moderate), 73-79 (Strong), 80+ (Very Strong)
- Scores below 60 are not imported into Salesforce to conserve data storage meaning only Moderate, Strong and Very Strong signals will be seen within Salesforce

Updates to Existing Fields

Intent Score (previously Average Company Surge Score)

- This is still the average mean of all topics scoring 60+ for a given domain but the field name has been generalized to allow for new scoring to be implemented in the future.

Weekly Intent Score Delta (previously Avg. Company Surge Score Delta)

- This is the change in Intent Score from the previous week and will remain empty if a given Cluster Type + Account/Lead domain pairing did not score at least a 60 in the previous week

Deprecated Fields

The following fields within the Bombora Company Surge® custom object have had their display names updated to make clear that they are deprecated. These fields have never been populated but have caused some customer confusion as they are holdovers from the legacy app experience. These fields have been labeled with 'zzz' to ensure they appear at the bottom of any list.

- This is still the average mean of all topics scoring 60+ for a given domain but the field name has been generalized to allow for new scoring to be implemented in the future.

Weekly Intent Score Delta (previously Avg. Company Surge Score Delta)

- Active (now labeled 'zzz_Deprecated Active')
- Last Active Date (now labeled 'zzz_Deprecated Last Active Date Time')
- Signal (now labeled 'zzz_bombora_data__Signal__c')

Custom widgets

The Bombora App managed package contains two new custom widgets (plus two legacy widgets) that can be added to page layouts. These widgets collect the Bombora Company Surge® custom object fields for easy reference and implementation.

Intent Score Widget (NEW)

This widget displays a visual gauge and references the following custom object fields: Cluster Type, Intent Score, Intent Score Strength and Weekly Intent Score Delta (displayed as a red or green directional arrow). The Intent Score Strength label is populated by the widget itself based on the Intent Score value.

Intent Summary Widget (NEW)

This widget displays each Bombora Company Surge custom object record associated with a given Account/Lead. It references the following custom object fields: Cluster Type, Intent Score, and Intent Score Strength

Company trends (LEGACY)

This is a comprehensive version of the widget which contains a Company Summary Surge record as well as dropdowns for each cluster Surge record associated with the Account or Lead.

Company trends summary (LEGACY)

This summary widget contains the Company Summary Surge record rollup data and lists the highest contributing non-summary cluster record.

Notable Technical Changes

Removed scores from Topic Data field

Prior to V7.3 the Topic Data field listed all topics within a cluster individually scoring above 60 along with their individual score as part of a comma separated list. In an effort to reduce the number of scores a customer interacts with, we've removed those scores in V7.3 - instead customers will only see a list of topic names (still ordered by individual score).

Deprecated Custom Account/Lead Fields

The nature of Salesforce app development precludes us from outright removing any component within the app, whether it be a full widget or an existing field. However, the following custom Account/Lead fields have had their display names updated to make clear that they are deprecated - these fields have never been populated but have caused some customer confusion as they are holdovers from the legacy app experience. These fields have been labeled with 'zzz' to ensure they appear at the bottom of any list.

Deprecated Fields

Total Active Topic Count (now labeled 'zzz_Deprecated Total Active Topic Count')

Sync process and triggers overview

In order for Bombora to map Salesforce records against Company Surge® Report outputs, Bombora creates and stores (for up to 30 days) a snapshot of the Account and/or Lead records in Salesforce.

The extraction of data on Lead records is turned off by default and can be enabled through the Domain Matching tab within the Bombora Admin App.

These snapshots contain the following Account & Lead (when enabled) fields:

- ID
- Name
- Website
- SystemModStamp
- Is Created by Bombora
- Exclude from Bombora
- Any other url/email field selected from the Domain Matching page within Bombora Admin App

In addition, Bombora pulls all fields from our Bombora Company Surge® custom object.

These snapshots allow Bombora to limit API traffic after the initial data sync and focus only on new and updated account and lead records on each subsequent sync.

In version 6.3 and earlier, Bombora Company Surge® record updates can occur outside of the context of manual/automated syncs. These updates are triggered whenever the identified Domain Matching fields are changed.

For example, if the website field value on a previously matched account record is deleted (or changed to an unmatchable value) then the Bombora App will delete all associated Bombora Company Surge® records. This is meant to ensure incorrect Intent data is not associated with Account and Lead records.

Deletion of Bombora Company Surge® records triggers

Whenever a sync occurs, whether it is an automated weekend process or manually initiated through the Bombora Admin App, Company Surge® records will be deleted if they do not contain a minimum of one topic with a score of 60+.

In addition, the Topic Data field will not include topics with a Company Surge® Score of 59 or lower.

Account and lead creation triggers

Whenever a new Account (and Lead if matching is enabled with Bombora Admin App) record is created, the Bombora App will attempt to match available Domain Matching fields to the latest Bombora Company Surge® Report and create Bombora Company Surge® records accordingly.

Converting leads to Accounts will also trigger an update as the Account created is considered new. Setting the 'Exclude from Bombora' field to true by default prevents these records from being updated.

Permission sets and license seats

In order for a Salesforce user to have view/interact with Bombora data they need to have both a Bombora Salesforce License as well as the appropriate Permission set. Licenses for the Bombora App can be assigned and managed by navigating through Setup > Apps > Installed Packages and selecting 'Manage Licenses.'

By default, Bombora's managed package contains 50 licenses or seats. If you need more licenses, please reach out to your CSM.

The following three Permission Sets are included and can be assigned based on a user's needs:

- **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.
- **Bombora Standard User Access**
 - 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.
- **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 Salesforce operations like Lead conversion or Account merging.

The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'Apps' entered. Below the search bar, the 'Apps' section is expanded, showing a list of categories: App Manager, AppExchange Marketplace, Connected Apps, Lightning Bolt, Lightning Bolt Solutions, Mobile Apps, Salesforce, and Packaging. The 'Installed Packages' link under the Packaging section is selected. The main content area displays a table of installed packages. The table has columns for 'Uninstall | Configure | Manage Licenses', 'Description', and 'Package Name'. The packages listed are: Jira Cloud for Salesforce (ServiceRocket), License Management App (salesforce.com), Salesforce Connected Apps (Salesforce.com), Salesforce Mobile Apps (Salesforce.com), Gong for Salesforce (Gong), AppAnalytics (JHD Labs), LinkedIn Sales Insights (LinkedIn), Bombora (Bombora), Company Dashboards (DASH), Bombora App (Bombora), and Bombora Unlocked (Bombora).

Lookup relationship vs. Master relationship explained

[Salesforce documentation](#) (External link)

Lookup relationship

Creates a relationship between two records so you can associate them with each other. On a standard or custom object, a lookup relationship creates a field that allows users to click a lookup icon and select another record from a window. In Bombora's new integration, the Custom Object (Bombora Company Surge®) has two lookup relationships. One lookup relationship is to the Account object, and the other is to the Lead object. Only one of the lookup relationships would ever be active on a given custom object record at a single time.

Master relationship

Creates a relationship between records where the master record controls certain behaviors of the detail record such as record deletion and security. You can create a master-detail relationship field on a custom object that links to a standard object.

Surf's up. Let's take off.

For more information, please
contact us at:

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