Technical Architecture and Support Documentation

Company Surge® for Salesforce (2.0)

User Guide
January 2023

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Contents

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

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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.
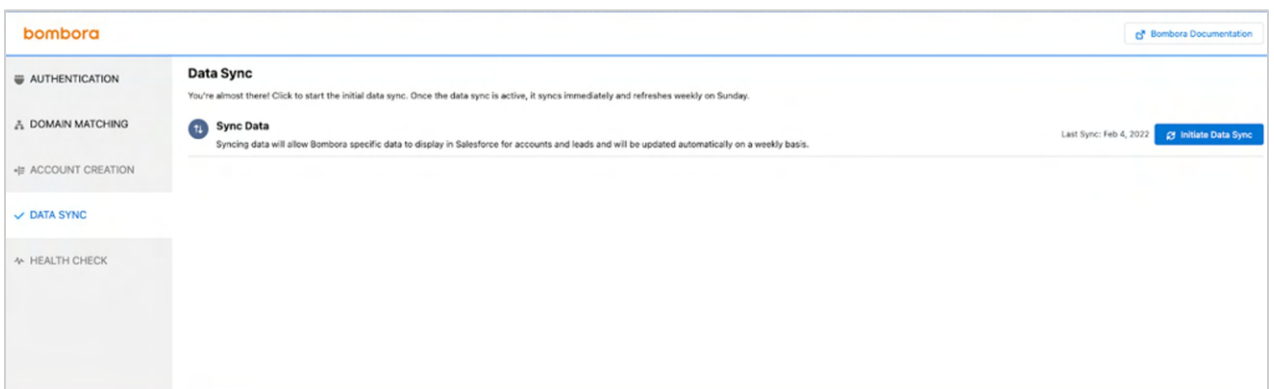
Topic clusters

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.

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
Average Surge 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

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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 Surge 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

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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

For log files or activity related to this application, please reference this help article for more information.

Custom widgets

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

Company trends

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

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

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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.

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.

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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.

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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.

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Surf's up.
Let's take off.

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

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