

Bombora Salesforce app Installation Guide

User Guide

March 2023

The Bombora logo consists of the word "bombora" in a lowercase, white, sans-serif font. A registered trademark symbol (®) is located at the top right of the letter "a". The logo is positioned in the bottom right corner of the page, set against a background of palm fronds and a blue sky.

bombora[®]

© 2023 Bombora www.bombora.com @bomboradata

Contents

	Page #
Overview of Bombora Salesforce app	<u>3</u>
App installation	
Salesforce package installation	<u>4-6</u>
Validating named credentials	<u>7-8</u>
Connecting your Bombora account	
Connecting Bombora to your Salesforce account	<u>9-10</u>
Selecting topics and clusters	<u>11-12</u>
Domain matching	<u>13</u>
Account creation	<u>14</u>
Data sync	<u>15</u>
Embedding Bombora data into your Salesforce records	
Updating account lightning record page layouts	<u>16-17</u>
Licenses and permission sets	<u>18-20</u>
Permission set assignments	<u>21-22</u>
License management	<u>23</u>
Excluding records from Bombora data	<u>24</u>
Additional custom fields for account and lead objects	<u>25</u>
Additional resources	<u>25</u>
Frequently Asked Questions (FAQs)	<u>26-32</u>
Contact information	<u>33</u>

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 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 [here](#) 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:

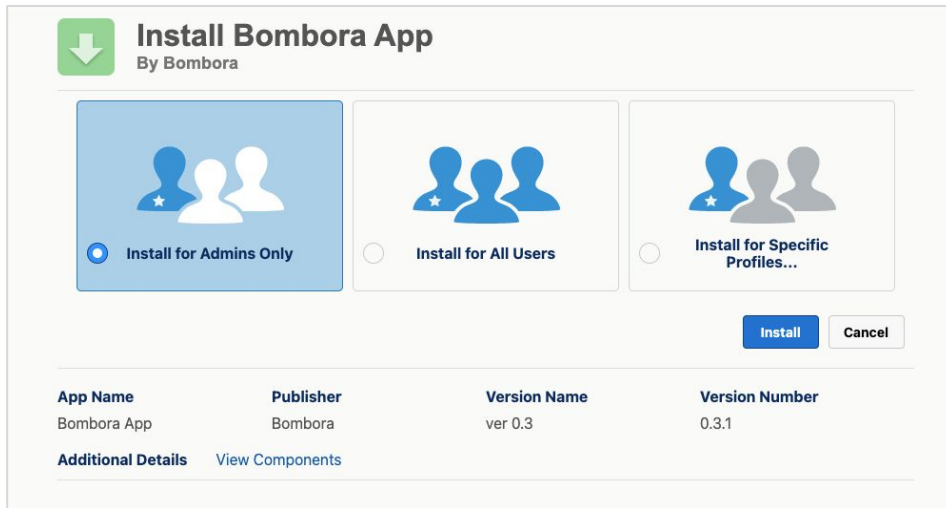
<https://mydomainname.lightning.force.com/packagingSetupUI/ipLanding.app?apvId=04t5b000001iPVNAA2>

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

App installation

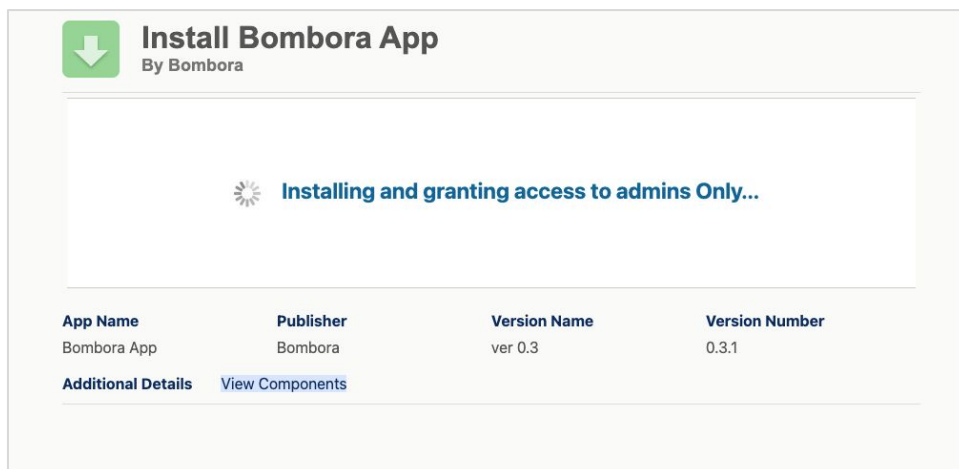
Salesforce package installation

- 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.



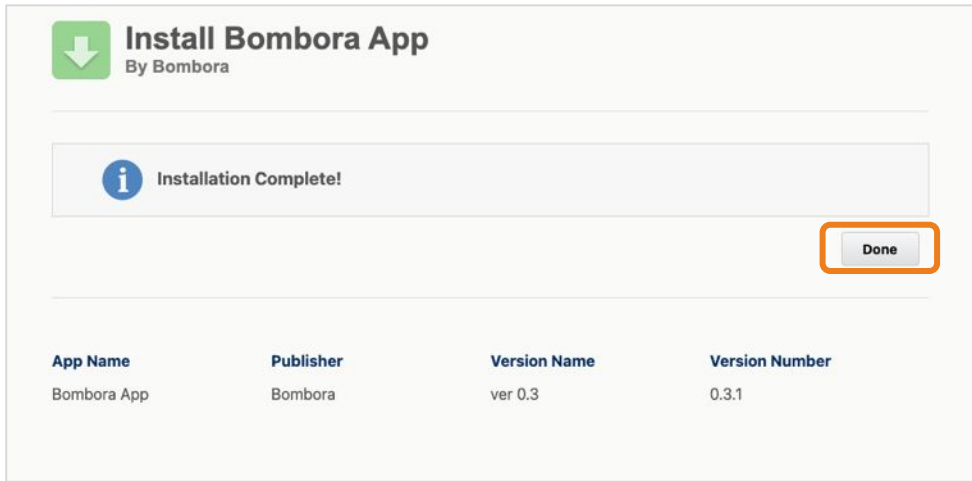
- 2 Select 'Install for Admins Only' and click 'Install'—installation may take a few moments.

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

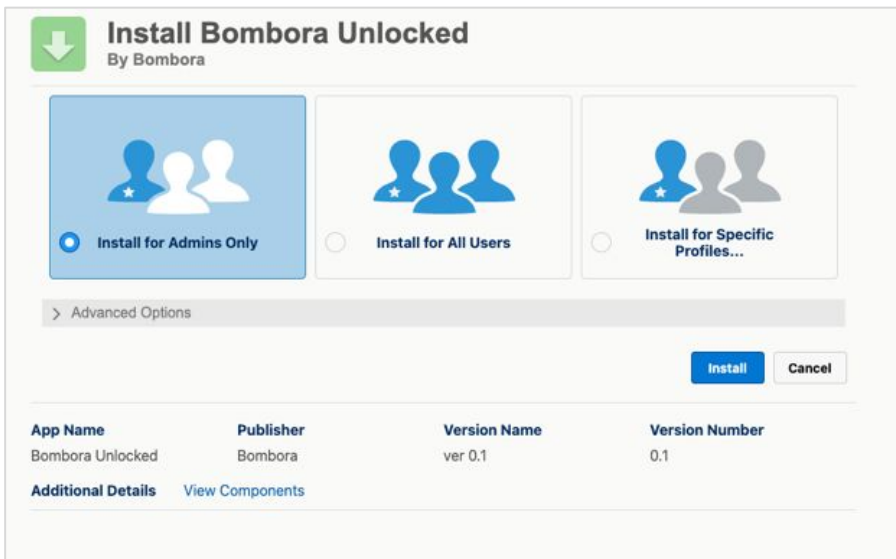


Salesforce package installation (cont.)

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



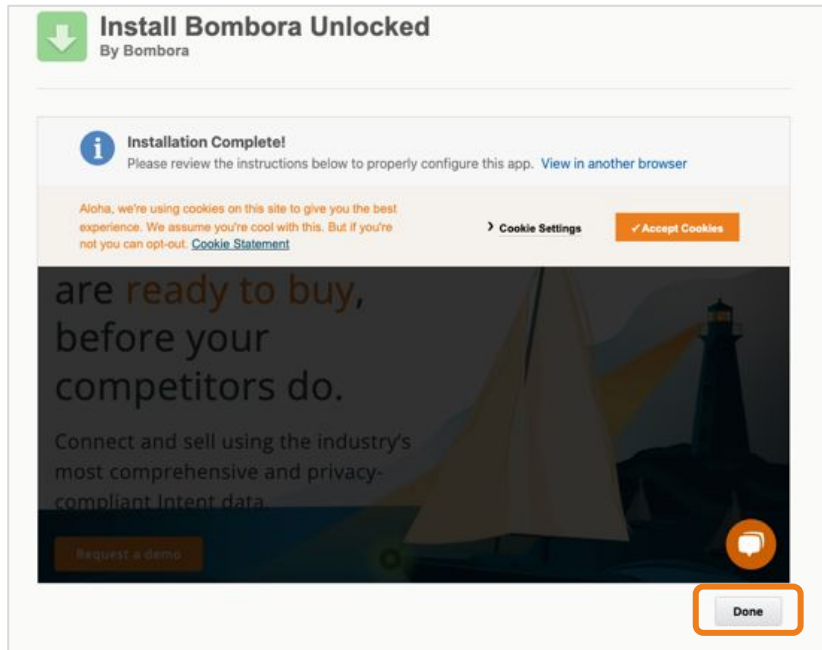
- At this stage all the components of the Bombora App are installed but you will need to install the 'Unlock' package before you're able to activate the integration. Click the second package installation link provided by your Bombora CSM. If you are still logged in or once you are logged in, you will 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.

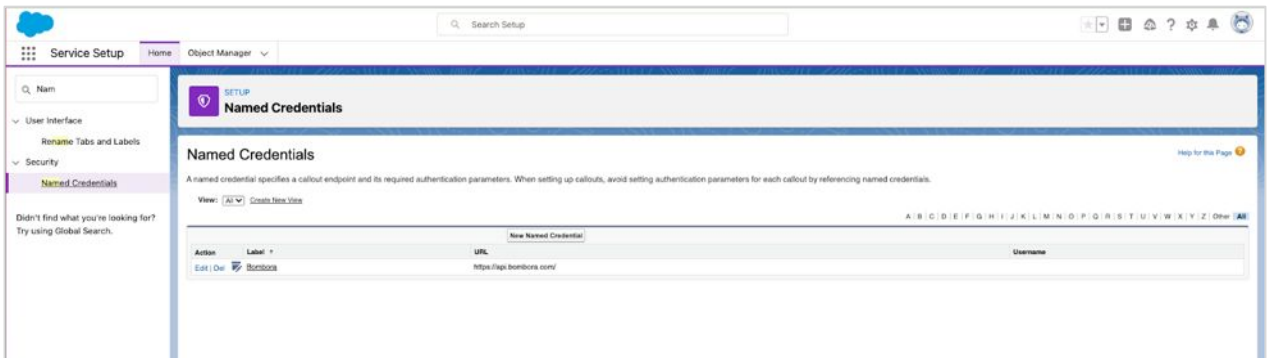


Validating named credentials

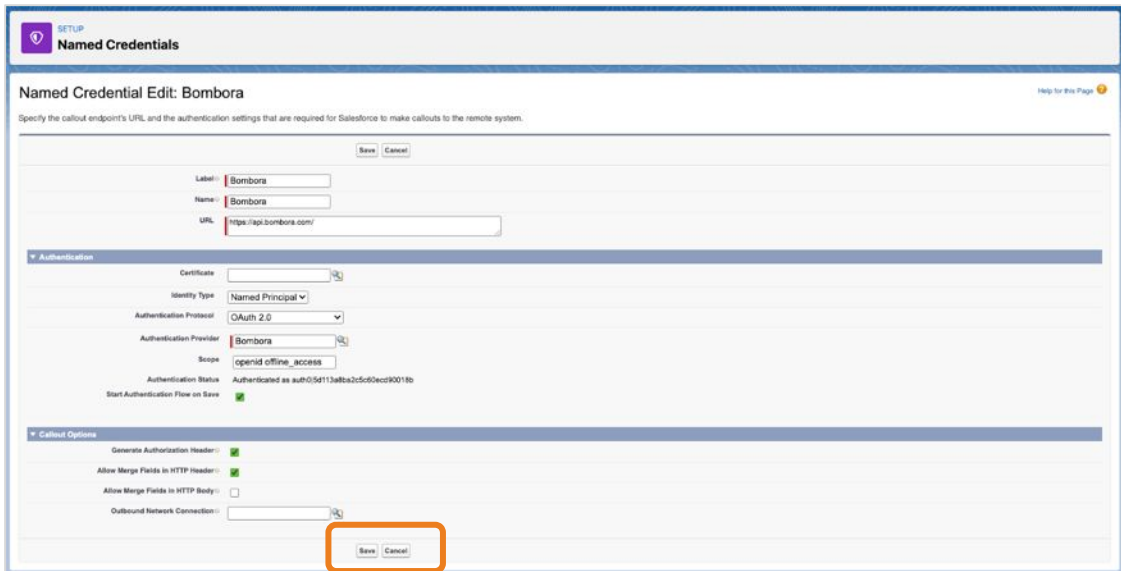
Before you authenticate the application for the first time, please ensure that you have obtained your consumer key & secret so that you can successfully update your authentication provider. If you have not received your key and secret, please submit a [support ticket](#) or contact Bombora support at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



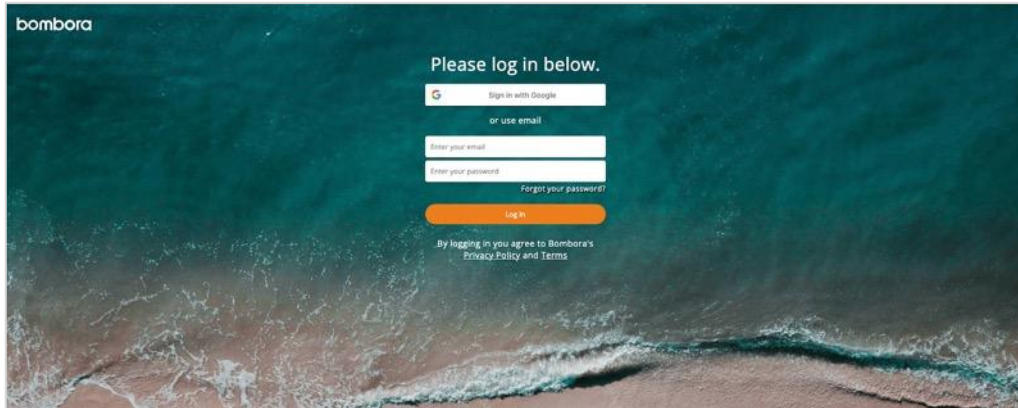
2 Click 'Edit' and ensure the form matches the screen below. Click 'Save' when complete.



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.

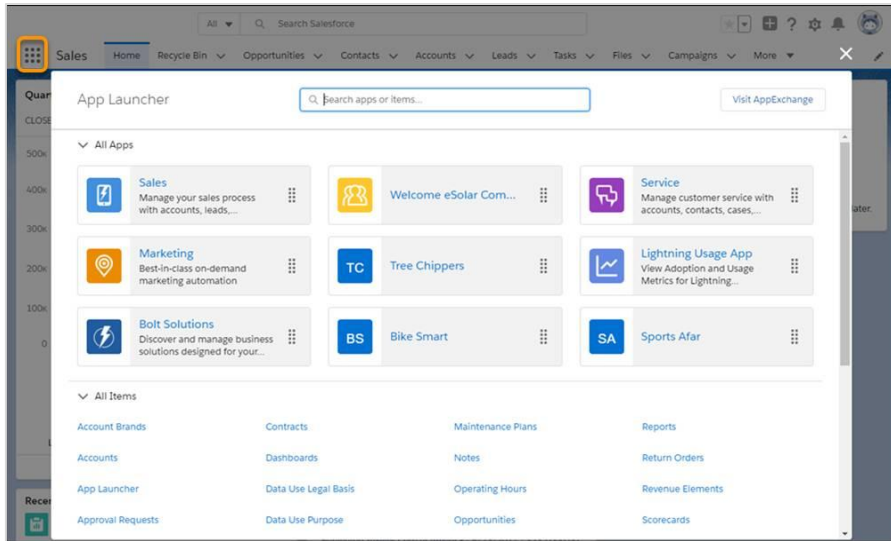
IMPORTANT: It is imperative that a user sign directly into the Salesforce account that your organization will be utilizing for the Salesforce to Bombora connection. **Please do not utilize SSO or log in as another user** as the Salesforce Integration requires the user to be logged in locally (non SSO) 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.

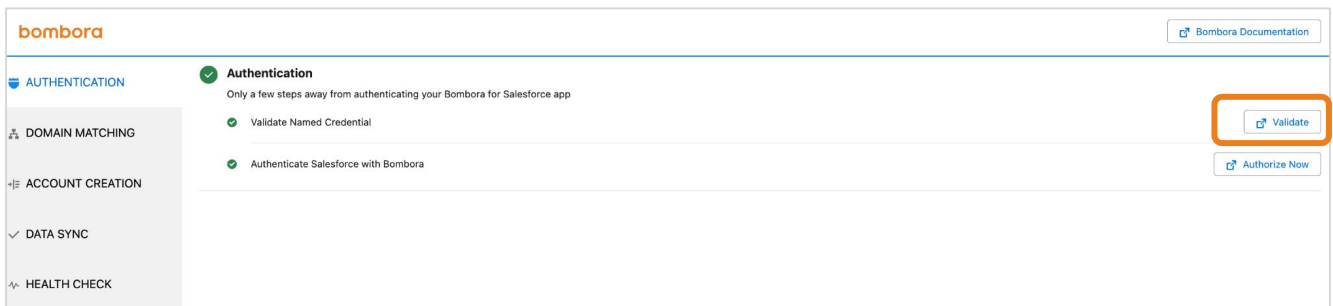
- 1 Navigate to the Bombora Admin app via the Salesforce App Launcher.



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

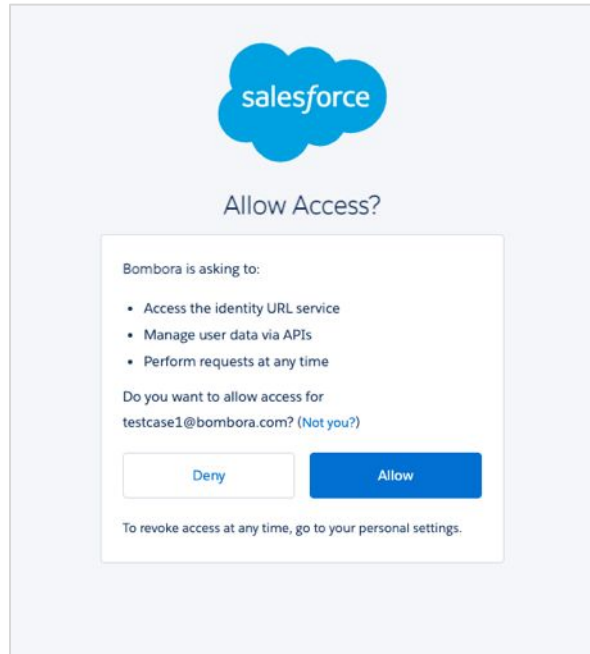
You can check if the 'Validate Named Credentials' step was completed successfully by clicking 'Validate' on the right side of the screen.

- 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

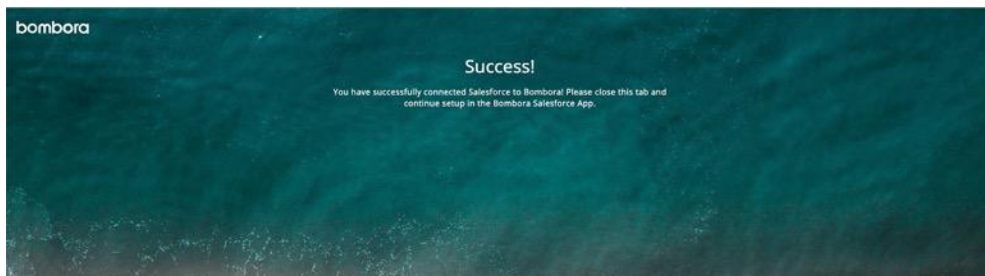


Connecting Bombora to your Salesforce account (cont.)

- 3 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.



- 4 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 work with your Bombora CSM to identify the right Intent topics and Topic clusters for your business. You can find the Topic Selection tool on the 'Integrations' tab of your Bombora account or by clicking 'Edit Settings' on the Salesforce option. For more information on Topic Selection and clusters, [click here](#).

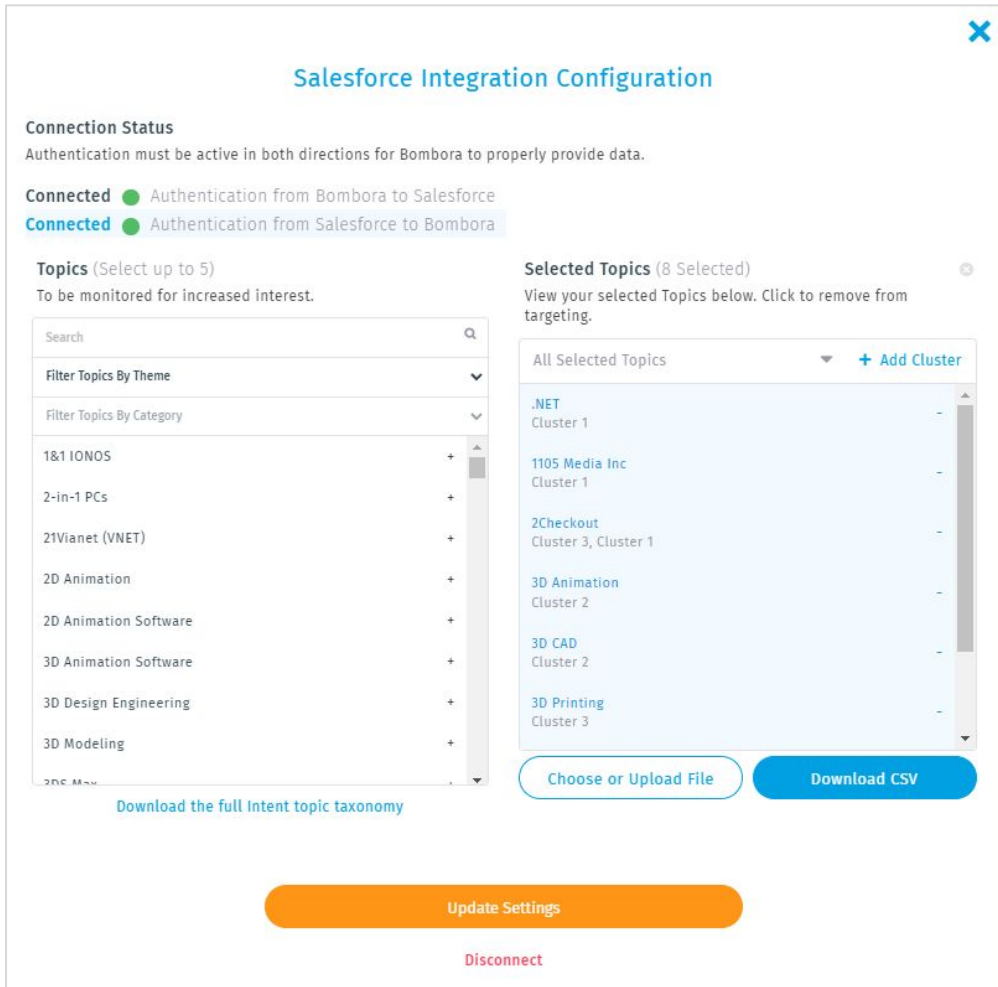
Connect to a Platform

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.

 <p>Identify hot accounts to drive outbound sales efficiency and relevance.</p> <p>Connect</p>	 <p>Use Intent insights to drive relevant, 1:1 marketing automation at scale.</p> <p>Connect</p>	 <p>Use Intent insights to drive relevant, 1:1 marketing automation at scale.</p> <p>Connect</p>	 <p>Keep your sponsored ad content up-to-date and aligned with your target accounts' interests.</p> <p>Connect</p>
 <p>Use Intent insights to drive relevant, 1:1 marketing automation at scale.</p> <p>Connect</p>	 <p>Prioritize target accounts for sales using Intent insights.</p> <p>Edit Settings</p>		

Selecting topics and clusters (cont.)

- 1 The 'Salesforce Integration Configuration' page will allow you to select Intent topics and assign Intent clusters either manually or through a .csv upload. You will also see the connection status of your Salesforce integration.



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

Topics (Select up to 5)
To be monitored for increased interest.

Search

Filter Topics By Theme

Filter Topics By Category

- 1&1 IONOS
- 2-in-1 PCs
- 21Vianet (VNET)
- 2D Animation
- 2D Animation Software
- 3D Animation Software
- 3D Design Engineering
- 3D Modeling

[Download the full Intent topic taxonomy](#)

Selected Topics (8 Selected)
View your selected Topics below. Click to remove from targeting.

All Selected Topics + Add Cluster

- .NET Cluster 1
- 1105 Media Inc Cluster 1
- 2Checkout Cluster 3, Cluster 1
- 3D Animation Cluster 2
- 3D CAD Cluster 2
- 3D Printing Cluster 3

[Choose or Upload File](#) [Download CSV](#)

[Update Settings](#)

[Disconnect](#)

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.

The screenshot shows the Bombora configuration interface for Domain Matching. On the left is a navigation menu with options: AUTHENTICATION, DOMAIN MATCHING (highlighted), ACCOUNT CREATION, DATA SYNC, and HEALTH CHECK. The main content area is titled 'Domain Matching' and contains two sections: 'Account Matching Selection' and 'Lead Matching Selection'. The 'Account Matching Selection' section has a 'Save' button highlighted with an orange box. Below the 'Save' button is a 'Bombora Documentation' link.

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: data_vendor_url_1__c, hubspot_website_field__c, account_domain_field__c

Selected Fields (by Priority): website

Lead Matching Selection Enable Lead Matching? Active

Lead Fields:

Selected Fields (by Priority): email, website

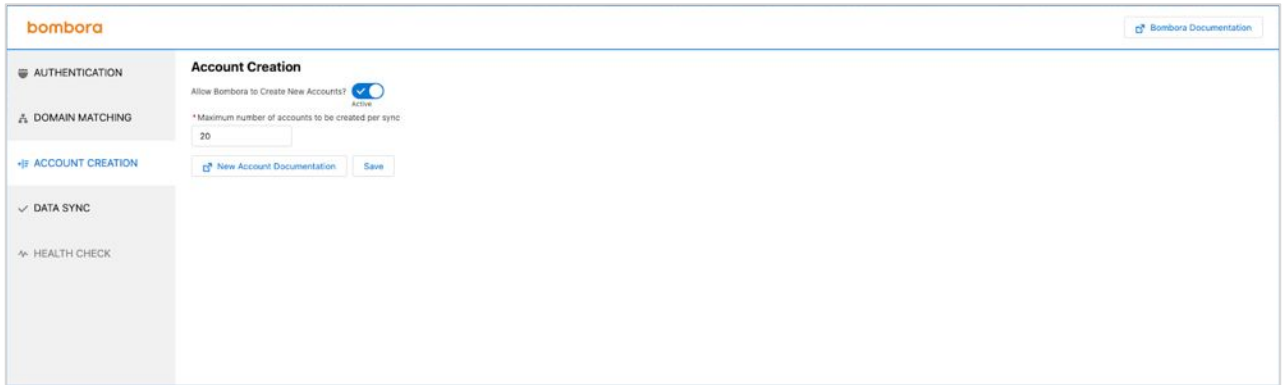
Save

- 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 user interface for the 'Account Creation' settings. On the left is a navigation menu with options: AUTHENTICATION, DOMAIN MATCHING, ACCOUNT CREATION (highlighted), DATA SYNC, and HEALTH CHECK. The main content area is titled 'Account Creation' and contains the following elements:

- A toggle switch for 'Allow Bombora to Create New Accounts?' which is currently turned on (Active).
- A text label: '*Maximum number of accounts to be created per sync:'
- An input field containing the number '20'.
- Two buttons at the bottom: 'New Account Documentation' and 'Save'.

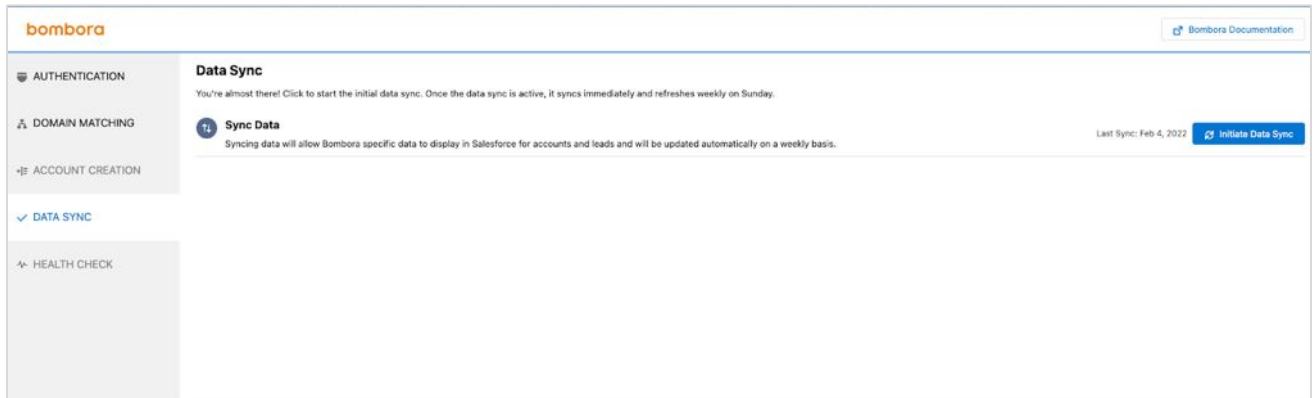
- 2 A limit can be set on the number of records created weekly. If more new records are available than the maximum set, we will create records with the highest Company Surge[®] scores first.

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.



- 2 If you've recently made changes to your topics 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.

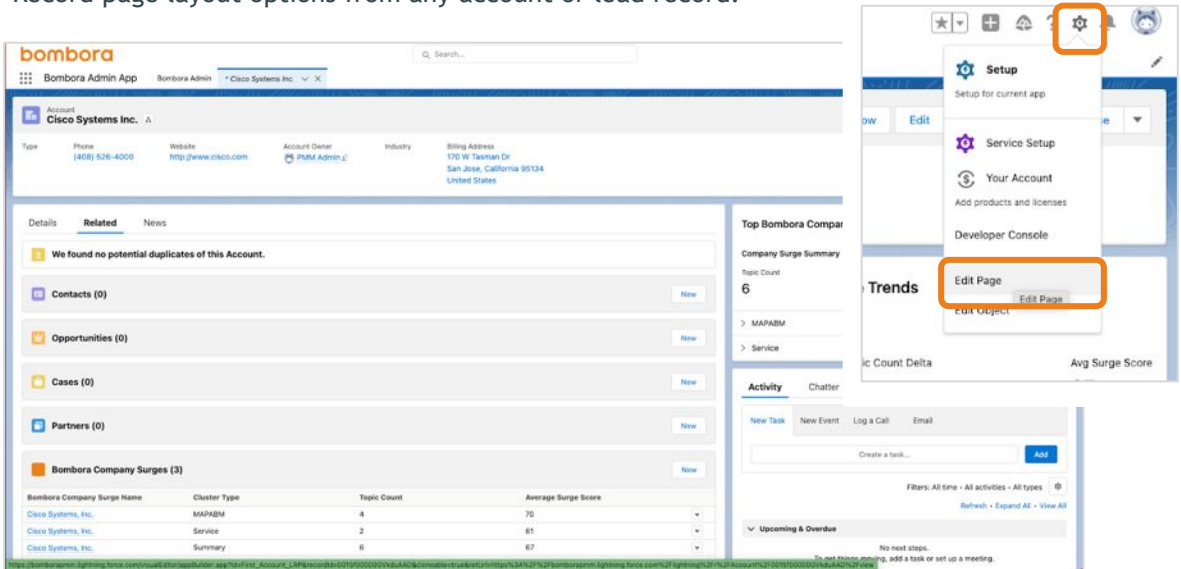
Please work with your Bombora CSM if you plan to make any significant changes and for best practices when updating Intent topics.

Embedding Bombora data into your Salesforce records

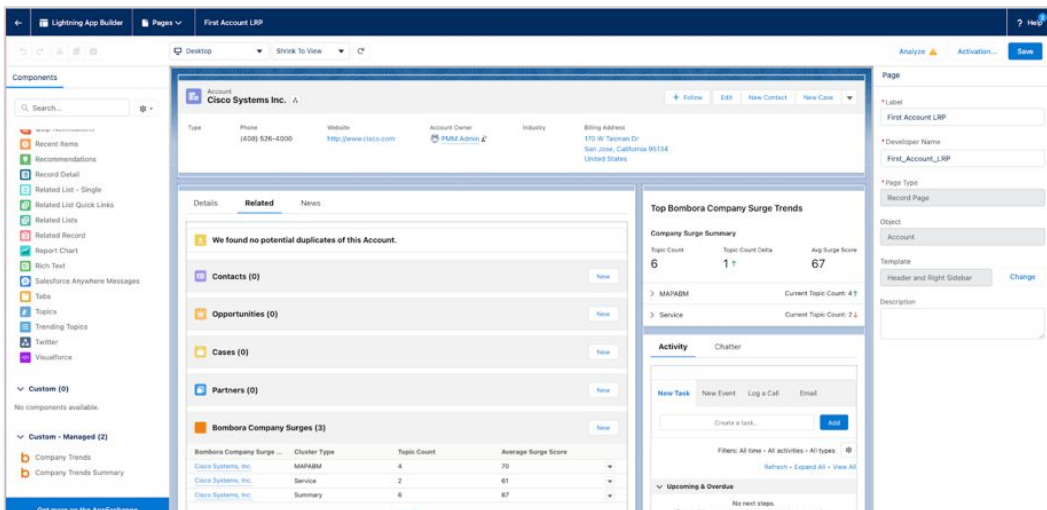
Updating account lightning record page layouts

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 options available: 'Company Trends' and 'Company Trends Summary' which can be dragged and dropped as inline or right-side rail elements.

Company Trends shows a summary of Intent metrics as well as drop downs into individual clusters that are showing business activity. Click 'Save' once complete.

Top Bombora Company Surge® Trends		
Company Surge Summary		
Topic Count	Topic Count Delta	Avg Surge Score
6	1 ↑	67
▼ MAPABM		Current Topic Count: 4 ↑
Cluster Topic Count	Topic Count Delta	Cluster Avg. Surge Score
4	3 ↑	70
▼ Service		Current Topic Count: 2 ↓
Cluster Topic Count	Topic Count Delta	Cluster Avg. Surge Score
2	2 ↓	61

- 4 'Company Trends Summary' shows only the rolled-up metrics in a more compact widget, denoting the Intent topic with the most activity.

Bombora Company Surge® Summary		
Bombora Company Surge Topic Count	Topic Count Delta	Average Surge Score
6	1 ↑	67
Cluster with Largest Topic Count this week: MAPABM	Cluster with Largest Topic Count Delta this week: MAPABM	Cluster with Highest Avg. Surge Score: MAPABM

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 shows a Salesforce account page for 'Permission Tests Inc'. The page is divided into several sections:

- Account Header:** Includes the account name 'Permission Tests Inc', a search bar, and navigation buttons like '+ Follow', 'Edit', 'New Contact', and 'New Case'.
- Account Details:** A table with fields for Type, Phone, Website (www.google.com), Account Owner (Tester Permissions), Industry, and Billing Address.
- Details Section:** A form with tabs for 'Details', 'Related', and 'Account Intent'. It contains fields for Account Owner, Account Name, Parent Account, Exclude from Bombora Surge, Company Email, Secondary Website, Average Surge Score Summary, Topic Count Summary, Description, Strongest Intent Cluster, Strongest Cluster - Topic Count, Address Information, and Shipping Address.
- Top Bombora Company Surge Trends:** A widget showing a 'Company Surge Summary' table with columns for Topic Count (19), Topic Count Delta (5 ↓), and Avg Surge Score (69). Below this is a list of products with their current topic counts: Product C (7 ↓), Product B (5 ↑), Product A (5), and Competitors (2 ↓).
- Intent by Cluster on This Account:** A section that currently displays the message: 'We can't draw this chart because there is no data.'

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*’

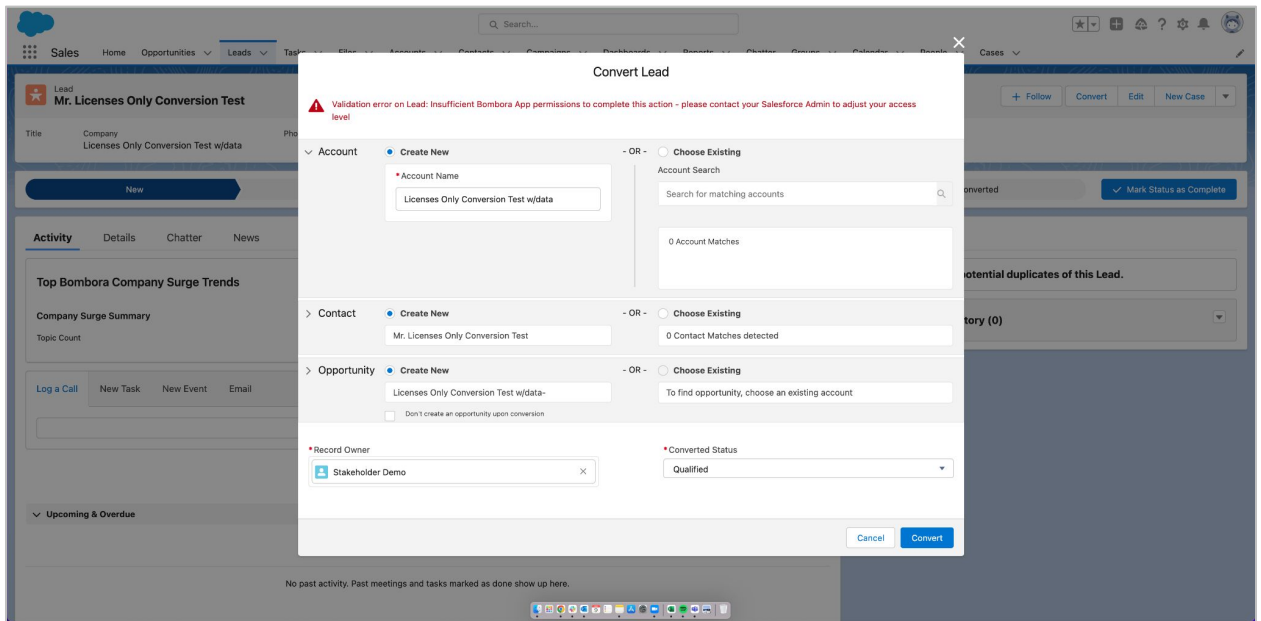
The screenshot shows a Salesforce account page for 'Permission Tests Inc.'. The account owner is 'Tester Permissions'. The page displays various account details such as phone, website, and address. On the right side, there are Bombora widgets. The 'Top Bombora Company Surge Trends' widget is visible but shows no data. Below it, the 'Activity' section shows a 'New Task' button and filters. The 'Upcoming & Overdue' section shows 'No activities to show'.

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.

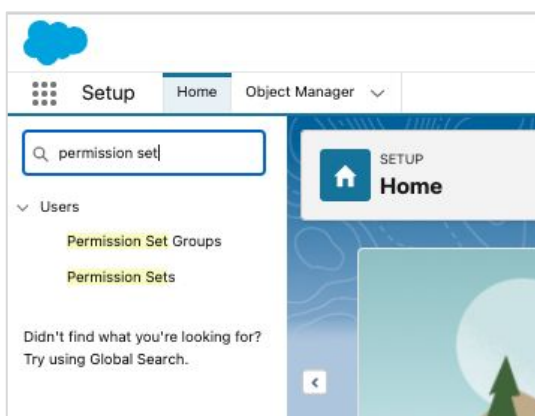
NOTE: Unless you downloaded the app yourself, you will need your Systems Administrator to grant access to the Bombora Admin app as needed, by adding users to the corresponding installed package.

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.
3. **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.

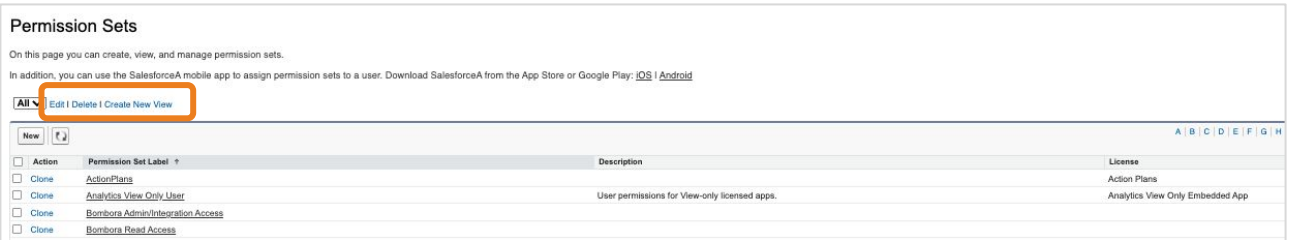
NOTE: Each user must be assigned a permission set to access the data

- 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

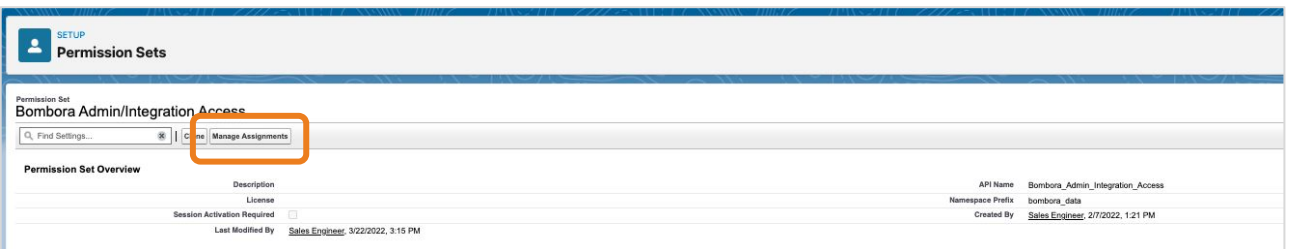
On this page you can create, view, and manage permission sets.

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

Action	Permission Set Label	Description	License
Clone	ActionPlans		Action Plans
Clone	Analytics_View_Only_User	User permissions for View-only licensed apps.	Analytics View Only Embedded App
Clone	Bombora Admin/Integration Access		
Clone	Bombora Read Access		

- Next, select ‘Manage Assignments’.



Permission Sets

Permission Set: **Bombora Admin/Integration Access**

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

Permission Set Overview

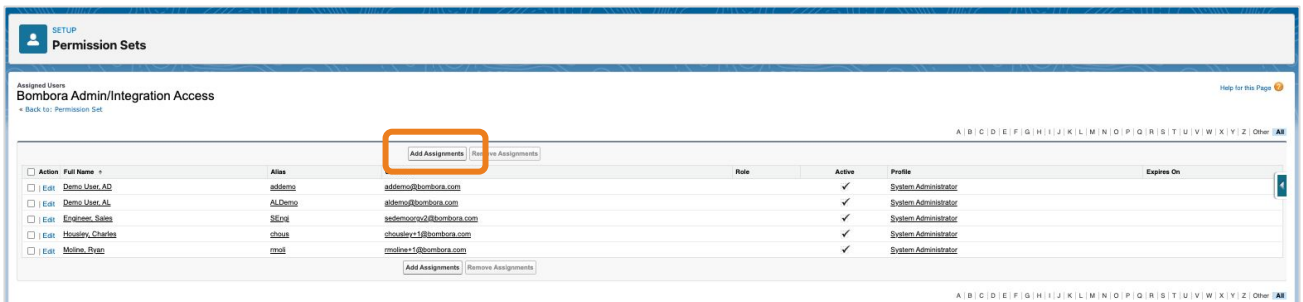
Description	API Name
	Bombora_Admin_Integration_Access

License	Namespace Prefix
	bombora_data

Session Activation Required	Created By
<input type="checkbox"/>	Sales Engineer: 2/7/2022, 1:21 PM

Last Modified By: Sales Engineer: 3/22/2022, 3:15 PM

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



Assigned Users

Bombora Admin/Integration Access

Back to: Permission Set

Add Assignments | Remove Assignments

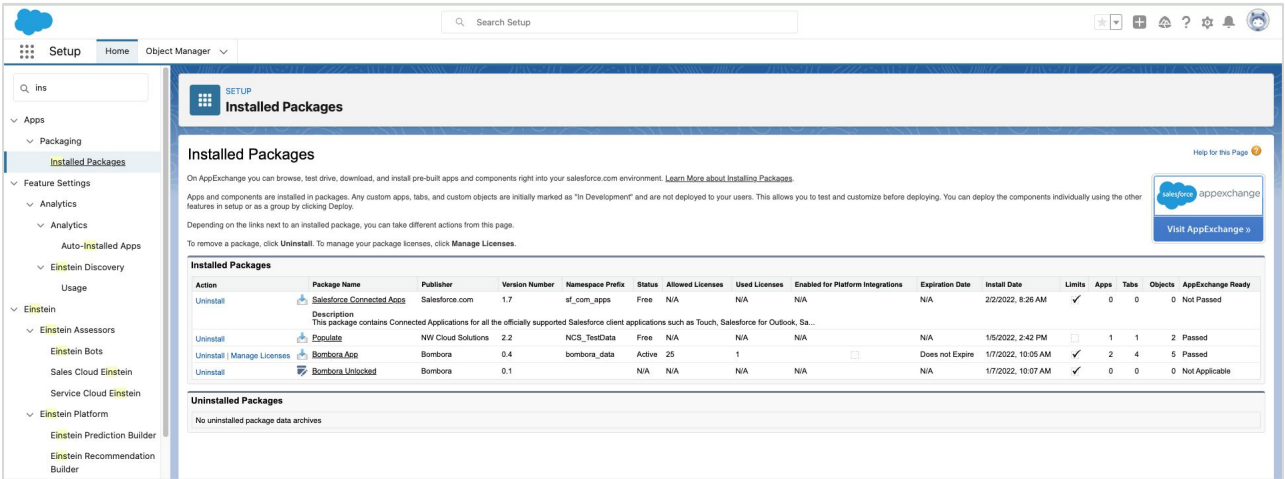
Action	Full Name	Alias	Role	Active	Profile	Expires On
<input type="checkbox"/>	Ed: Demo User_AD	ademo	ademo@bombora.com	✓	System Administrator	
<input type="checkbox"/>	Ed: Demo User_AI	AI Demo	aidemo@bombora.com	✓	System Administrator	
<input type="checkbox"/>	Ed: Engineer_Sales	SEng	sedemo@bombora.com	✓	System Administrator	
<input type="checkbox"/>	Ed: Housley, Charles	chous	chousley@bombora.com	✓	System Administrator	
<input type="checkbox"/>	Ed: Malone, Ryan	rmal	rmalme@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.

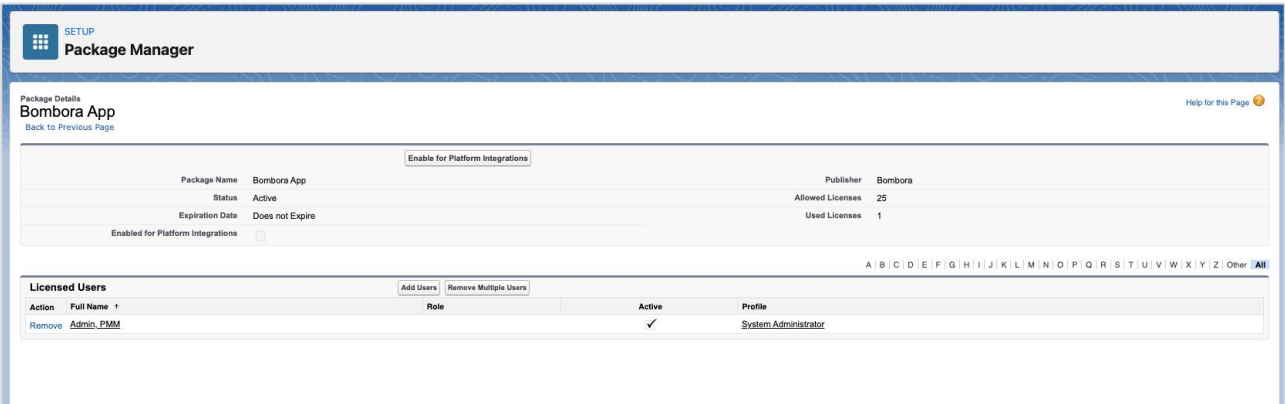
License management

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



The screenshot shows the Salesforce Setup interface. The left sidebar contains navigation options like 'Apps', 'Packaging', 'Feature Settings', 'Analytics', 'Auto-Installed Apps', 'Einstein Discovery', 'Usage', 'Einstein', 'Einstein Assessors', 'Einstein Bots', 'Sales Cloud Einstein', 'Service Cloud Einstein', and 'Einstein Platform'. The main content area is titled 'Installed Packages' and includes a search bar, a 'Help for this Page' link, and a 'Visit AppExchange' button. Below this, there is a table of installed packages with columns for 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, and AppExchange Ready. The table lists three packages: 'Salesforce Connected App', 'Populate', and 'Bombora App'. The 'Bombora App' row shows 25 allowed licenses and 1 used license. Below the table, there is a section for 'Uninstalled Packages' which is currently empty.

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



The screenshot shows the 'Package Manager' interface for the 'Bombora App'. The page title is 'Bombora App' and it includes a 'Back to Previous Page' link. The main content area displays the package details, including a button to 'Enable for Platform Integrations'. The details are as follows:

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

Below the details, there is a 'Licensed Users' section with a table showing the user 'Admin_PMM' with the role 'System Administrator' and an active status.

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.

The screenshot shows a Salesforce account record for Cisco Systems Inc. The account owner is PMM Admin. The details section includes fields for Account Owner, Account Name, Parent Account, Data Provider Account URL, Customer Service Email, and Social URL. The 'Exclude from Bombora Surge' checkbox is currently unchecked.

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

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

Additional custom fields for account and lead objects

These new fields will allow Bombora data to be added to List Views as well as connections to outside platforms like Outreach

- **Topic Count Summary**
 - The number of topics from the list of selected topics for which the business is spiking on across all clusters
 - This will show the user the number of topics, across all clusters, that a given account/lead is showing Intent on and can be used to prioritize outreach. Higher topic count = more active research observed by Bombora
- **Average ‘Surge’ Score Summary**
 - This is the average ‘Surge’ Score across all selected topics that the business is spiking on
 - This will show the average ‘Surge’ score across all topics for a given account/lead
- **Strongest Intent Cluster**
 - The topic cluster with the highest active ‘Topic Count’ for this business
 - This will show which cluster has the most Intent activity on a given account/lead and can be used in routing records into workflows based on the cluster
- **Strongest Cluster - Topic Count**
 - The topic count of the cluster identified in the ‘Strongest Intent Cluster’ field
 - This will be used to prioritize account/leads in the workflow routed mentioned above

Additional resources

After successfully installing the Company Surge® for Salesforce application, many customers create custom views of the data to better enable their teams. Please note that these resources are optional and are not required to successfully use Bombora’s Company Surge® for Salesforce. For more information, please visit the [Bombora Customer Resource Center](#).

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:
 - '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.
 - '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.
 - '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 How do I select topics to integrate in my SFDC instance?

- Through your Bombora account you will be able to select the topics (that can be grouped into clusters) from our taxonomy that you'd like to monitor. These topics create a unique Company Surge[®] Report that becomes the basis of our weekly data sync.
- Our Salesforce integration will extract account and/or lead records from your org (you'll have the ability to flag records to exclude as needed) and import Bombora data directly into those records.
- Our sync process typically occurs automatically each weekend, starting on Fridays with our extraction of records and completing late Sunday with the import of relevant Bombora data.
- See the [User Guide here for full instructions](#) on integrating topics into SFDC.

2 Who can add/delete/change topics 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 topics for the Salesforce Integration.

3 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 Is there a way to see the individual ‘surging’ topic names?

The only way to expose the granular topic/score level of detail is either by putting the ‘Bombora Company Surge[®]’ related list onto the account/lead page layout, or to create a custom report that includes the ‘Topics’ field as a column. If there is a desire to filter based on a specific topic or few topics it might be easier to just have that broken out as a small/single topic cluster.

4 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

5 What does 'Default' mean when I see clusters?

There are two scenarios where your cluster summary will return a value of "default":

1. Clusters have not been configured in your Bombora account. We recommend enabling this feature to take full advantage of clusters.
2. If you have already enabled clustering in your Bombora account, any topics that have NOT been assigned to a cluster will be aggregated into a "default" cluster until they are reassigned.

6 What are the best practices for using Topic Clusters?

A topic cluster is a group of like-minded Intent topics representative of all facets of a product or service. By aggregating singular but related topics into a cluster, you are able to focus on accounts showing Intent on a 'theme' that spans multiple topics. Engagement on multiple topics within a cluster is more indicative of buying behavior than activity on a single topic on its own.

For more information, please check out our [topic and cluster selection guide](#) or visit our [customer resource center](#).

7 What fields can be pushed to external platforms:

These fields will allow Bombora data to be added to List Views as well as connections to outside platforms that require fields associated with Account and Lead objects (like Outreach and SalesLoft).

- **Topic Count Summary:** This will show the user the number of topics, across all clusters, that a given account/lead is showing Intent on and can be used to prioritize outreach. Higher topic count = more active research observed by Bombora.
- **Average Company Surge[®] Score Summary:** This will show the average Company Surge[®] score across all topics for a given account/lead.
- **Strongest Intent Cluster:** This will show which cluster has the most Intent activity on a given account/lead and can be used in routing records into workflows based on the cluster.
- **Strongest Cluster - Topic Count:** This will be used to prioritize account/leads in the workflow routed mentioned above

Bombora Company Surge® for Salesforce 2.0 FAQs

About the data

8 Why doesn't Bombora sync to account records that have a domain value ending in .edu?

Company Surge® reporting for Salesforce excludes domains ending in .edu by default. Please reach out to your Customer Success Manager if you require data to be appended to domains that end in .edu.

9 What if our website field(s) contain base URL information (ex: https://www.)? 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) from the provided URL.

10 What happens when I change the website field on an account?

- Updating/creating new records does trigger a sync with our data on that record but that endpoint is currently disabled as we assess the volume of requests that can cause - reach out to Bombora's team if you'd like to request this be different in the future.
- Additionally updating the website triggers the deletion of associated Bombora records - for example if you remove/update the domain values used in Bombora's matching and save those changes we will delete the Bombora Company Surge® records in our custom object. This is to ensure we are not displaying old data for a potentially new domain.
- Changing the domain back to the original value or another matchable domain will repopulate the data during the next manual or weekend sync.

11 How do I know when my data was last updated?

Two other quick ways to identify when the last data sync occurred:

- In the admin app, the data sync tab contains a last sync date
- Last modified dates sit on the Bombora Company Surge® custom object as well

Bombora Company Surge[®] for Salesforce 2.0 FAQs

About the data

12 How do you match data to fields containing string values?

- Email addresses as a string value will cause issues for matching - we're able to identify the domain within a single email address but our matching will have a hard time identifying the individual emails in a comma separated list.
- In regard to a new value to capture Bombora Company Name - there is currently a field created when our app is installed that shows the Bombora company name called 'Bombora Company Surge[®]: Bombora Company Surge[®] Name' so there may be some redundancy to look out for once the app is fully implemented.

13 How do I install the unlocked package in a sandbox org?

To install the unlocked package in your sandbox, change the word 'login' in your URL to say 'test.' The revised URL will require users to login with their sandbox credentials.

14 Q: Why do I need a license and permission set in Production but not in Sandbox?

A: Sandboxes have site-wide licenses. Once in production, Bombora's managed package uses a seat-based licensing model to govern who has access to the features of the Salesforce integration.

Surf's up. Let's take off.

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



bombora[®]

© 2023 Bombora www.bombora.com @bomboradata