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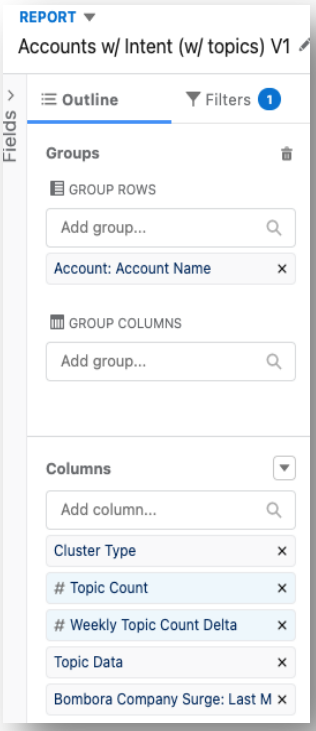
Building Dashboards for Bombora's V2 Company Surge Integration to SFDC

Build a Basic Account Prioritization report based on Company Surge

1. Start by building a report that is Grouped by Account name, and With Columns Including Cluster Type, Topic Count, Weekly Topic Count Delta, Topic Data, and Bombora Company Surge: Last Modified Date.



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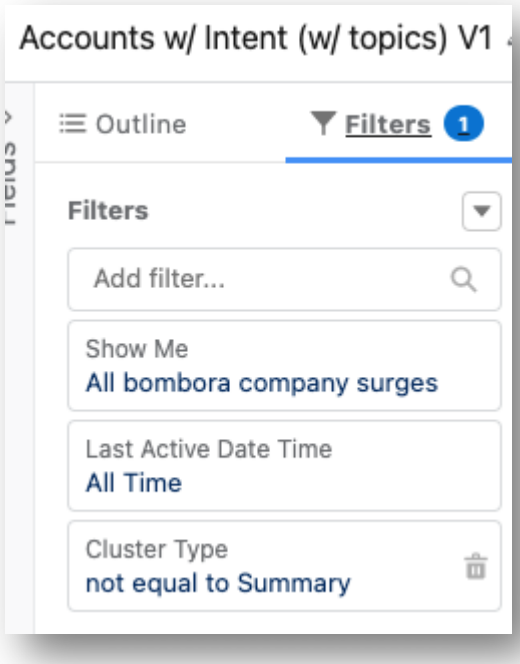
2. Filter the report by
    a. ‘Show me’ All bombora company surges
    b. ‘Last Activity Date’ All Time
    c. ‘Cluster Type’ not equal to summary (To make sure sum of Topic count is accurate and not double counted)



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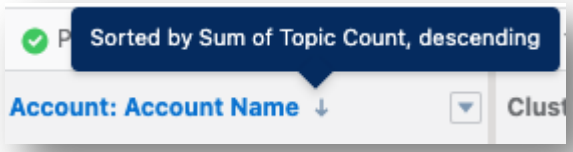
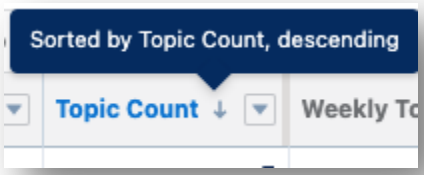
3. Sort by ‘Sum of Topic Count Descending’ on the Account Name



And sort by ‘Topic Count Descending’ on the Topic Count Column



4. Report should look like this:

Report: Bombora Company Surges with Account
Accounts w/ Intent (w/ topics) V1

Total Records	Total Topic Count	Total Weekly Topic Count Delta
685	2,521	102

Account: Account Name	Cluster Type	Topic Count	Weekly Topic Count Delta	Topic Data	Bombora Company Surge: Last Modified Date
Boston Scientific Corporation (4)	Product_C_Cluster	17	6	Cloud Automation : 85, Sales and Marketing Automation : 85, Marketing Automation Tools : 83, Marketing Automation : 82, Sales Process Automation : 82, Internet Marketing Automation : 82, Data Center Automation : 80, Infrastructure Automation : 78, Profes...	5/31/2022
	Product_A_Cluster	5	-1	Digital Workflow : 77, Digital Marketing : 73, Digital Process Automation : 64, Digital Signal Processing : 63, Digital Transaction : 61	5/31/2022
	Product_B_Cluster	5	-1	Business Communications : 76, Business Plan : 73, Business Transformation : 73, Business Process Automation (BPA) : 62, Web Strategy : 60	5/31/2022
	Competitor_Cluster	1	0	Adobe Systems (ADBE) : 60	5/31/2022
Subtotal		28	4		
Entergy Corporation (4)	Product_A_Cluster	9	-3	Digital Workspace : 78, Digital Process : 69, Digital Transformation : 69, Digital Asset : 64, Digital Agency : 64, Digital Strategy : 62, Digital Marketing : 61, Digital Onboarding : 61, Digital Process Automation : 60	5/31/2022
	Product_C_Cluster	8	2	Cloud Automation : 81, Mobile App Automation : 80, Main Automation Contractor : 78, Job Scheduling / Workload Automation : 77, Supply Chain Automation : 72, Sales and Marketing Automation : 69, Professional Services Automation : 67, Business Process Auto...	5/31/2022
	Product_B_Cluster	7	-1	Integrated Business Planning : 71, Business Continuity : 67, Business Intelligence : 66, Business Communications : 66, Business Metrics : 65, Business Retention : 62, Business Process Automation (BPA) : 61	5/31/2022
	Competitor_Cluster	2	-1	Adobe Systems (ADBE) : 67, Microsoft (MSFT) : 60	5/31/2022
Subtotal		26	-3		
DTE Energy Co. (4)	Product_A_Cluster	14	5	Digital Marketing : 83, Digital Experience Platform (DXP) : 80, Digital Transformation : 71, Digital Insight : 70, Digital Learning : 70, Digital Media :	5/31/2022

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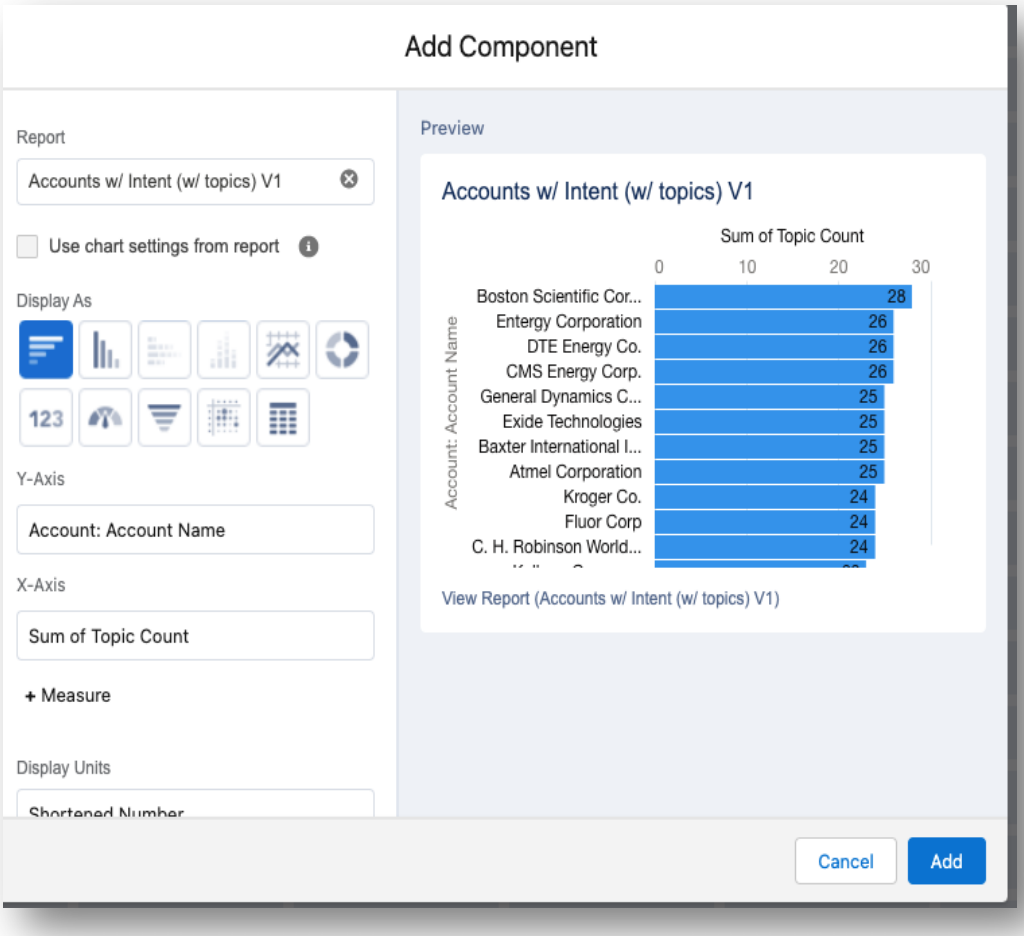
Create a Dashboard & a Component that shows Accounts Ranked by Intent

1. Create a new dashboard, and add a new component, selecting the report you just built
    a. Add the Following Filters/selections
        i. Horizontal bar graph
        ii. Y Axis: Account Name, X Axis: Sum of Topic Count
        iii. Sort By Topic Count, Descending
        iv. Title Accordingly Ex. Accounts Ranked by Sum of Topic Count



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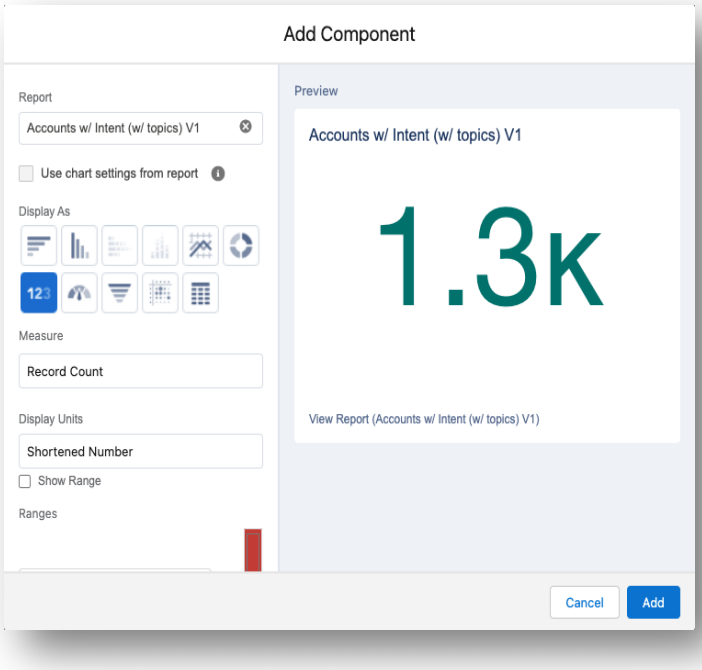
Create a Component that shows Total Number of Accounts Showing intent

1. Add a new component, selecting the report you have already built.
    a. Instead of a horizontal line graph, select the ‘Number’
        i. Select ‘Record Count’ for the ‘Measure’ section

ii. Title Accordingly



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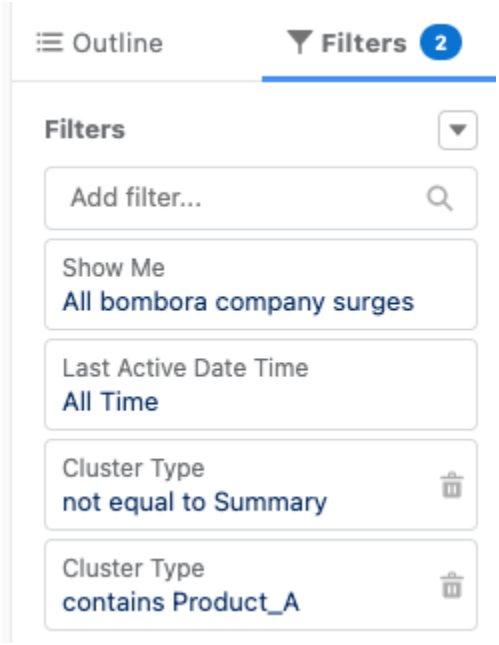
Optional: Total Number of Accounts showing intent on a specific product cluster

1. Duplicate the report you already created
2. On the report's filters, select Cluster Type Contains "Name of Cluster" (Note: Spelling Matters here)
3. Change Report name accordingly and Save (Ex. Accounts w/ Intent for Prod. A)



4. Create a component on the same dashboard, selecting the report you just created

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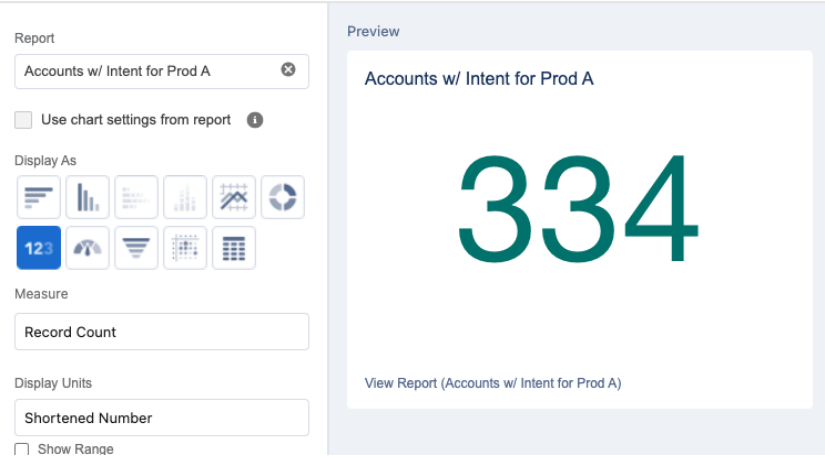
5. Name appropriately, select the number component type, and select ‘Measure’ Record Count



6. Repeat as necessary for as many clusters as you want to track

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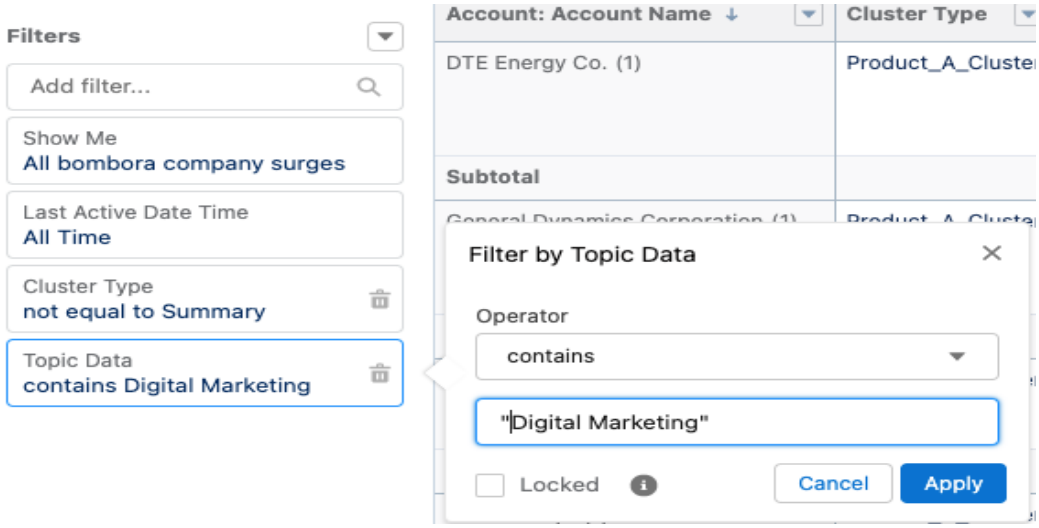
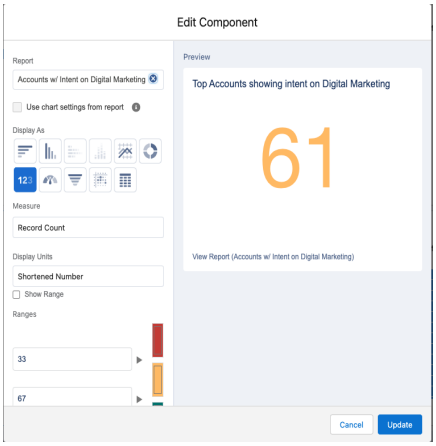
Optional - Component showing accounts w/ intent on a particular topic

1. Duplicate the original report you created
2. On the report's filters, add a filter for 'Topic Data' > Contains > "Desired Topic" (Spelling matters, and use quotations)
3. Change report name accordingly and Save



4. Create a component on the same dashboard, selecting the report you just created
5. Add the Following Filters/selections to the component
    v. Select the Number chart type
    vi. Select Record Count for the measure section
    vii. Title Accordingly Ex. Total Accounts showing intent on "Digital Marketing"



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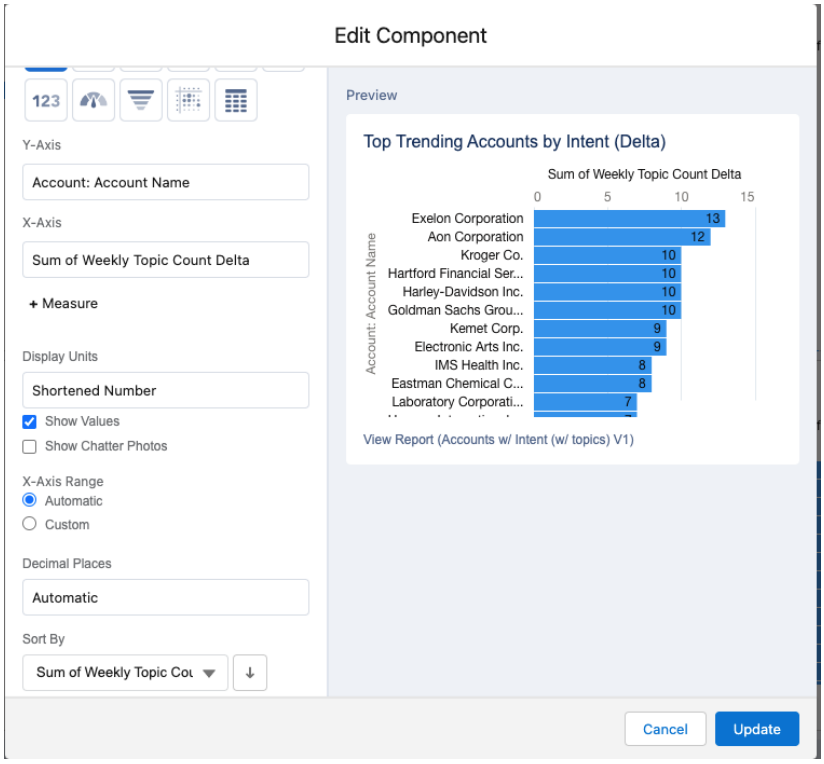
Optional: Top Trending Accounts by intent (Delta)

1. Using the original report (Accounts w/ Intent (w/topics) V1 in this case) Create a new report chart component on your dashboard
    a. Select Horizontal bar graph for chart type
    b. Set the Y axis: Account: Account name, X Axis: Sum of Weekly Topic Count Delta
    c. Sort by Sum of Weekly Topic Count Delta Descending
    d. Title Accordingly



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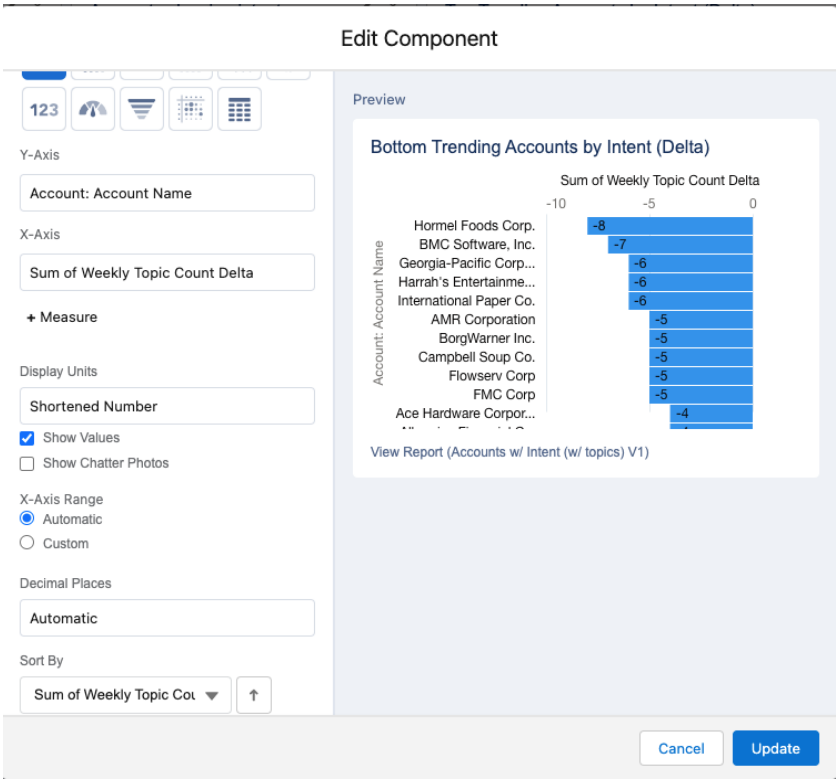
Optional: Bottom Trending Accounts by intent (Delta)

2. Using the original report (Accounts w/ Intent (w/topics) V1 in this case) Create a new report chart component on your dashboard
    a. Select Horizontal bar graph for chart type
    b. Set the Y axis: Account: Account name, X Axis: Sum of Weekly Topic Count Delta
    c. Sort by Sum of Weekly Topic Count Delta Ascending
    d. Title Accordingly



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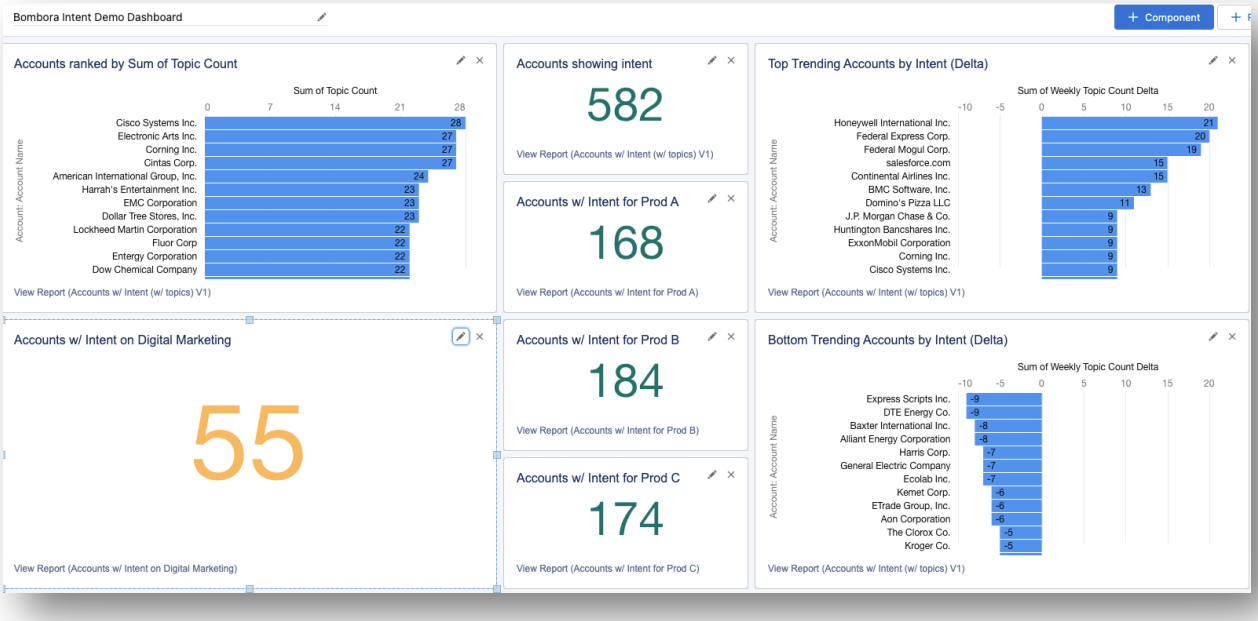
Final Dashboard Result



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