

## Bombora Company Surge for Salesforce 2.0 FAQs

### Overview:

1. **Where can I see a preview of the new Bombora Company Surge for Salesforce 2.0 app?**
  - a. [Visual App Overview](#) - View screen grabs and a brief overview of the new app and data widgets.
  
2. **Which editions of Salesforce are supported by the new app?**
  - a. 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.
  - b. 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?**
  - a. Yes, Bombora's managed package uses a seat-based licensing model to govern who has access to the features of the Salesforce integration.
    - i. By default, you will have 50 seats that can be allocated to end users in your salesforce org.
    - ii. Additional seat licenses can be added based on your contract. Please contact your CSM for additional information.
  - b. You can allocate licenses to end users by going into "Setup" -> "Installed Packages" -> "Bombora" -> "Manage Licenses"
  
4. **Is there a way to limit what access my end users will have to Bombora data in our salesforce?**
  - a. Yes, you can govern end users' access to Bombora data within your org via permission sets included in the managed package.
  - b. The managed package includes 3 permission sets with different levels of access:
    - i. "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.
- ii. “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.
- iii. “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.
- c. Each user must be assigned a permission set to access the data.

## Installation:

1. **How do I select topics to integrate in my SFDC instance?**
  - a. 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.
  - b. 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.
  - c. 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.
  - d. 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?**
  - a. 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?**
  - a. 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”.

- b. 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.

## About the Data:

1. **Who is able to do a manual sync for Bombora data?**
  - a. 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?**
  - a. 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 surge data.
3. **Is there a way to see the individual surging topic names?**
  - a. 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. **What fields can be pushed to external platforms:**
  - a. 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).
    - i. Topic Count Summary
      1. 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.
    - ii. Average Surge Score Summary
      1. This will show the average surge score across all topics for a given account/lead.
    - iii. Strongest Intent Cluster
      1. 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.
    - iv. Strongest Cluster - Topic Count

1. This will be used to prioritize account/leads in the workflow routed mentioned above

**5. What happens when I change the website field on an account?**

- a. 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.
- b. 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.
- c. Changing the domain back to the original value or another matchable domain will repopulate the data during the next manual or weekend sync.

**6. How do I know when my data was last updated?**

- a. Two other quick ways to identify when the last data sync occurred:
  - i. In the admin app, the data sync tab contains a last sync date
  - ii. Last modified dates sit on the Bombora Company Surge custom object as well

**7. How do you match data to fields containing string values?**

- a. 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.
- b. 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.