

# bombora

## Company Surge<sup>®</sup>

for  **Marketto<sup>®</sup>**

Installation Guide  
version 10.0  
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**bombora**

bombora.com | @bomboradata

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# Why use Company Surge<sup>®</sup> for Marketo?

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## Power up your email

Company Surge<sup>®</sup> for Marketo delivers a boost to your contact profiles by enriching them with relevant and timely Company Surge<sup>®</sup> data so you can send better emails and generate better responses.

## Smarter nurture campaigns

Enrich your contact profiles with data that helps you segment and re-engage dormant contacts for nurture campaigns.

Company Surge<sup>®</sup> for Marketo arms you with the knowledge of which target prospects are interested in what topics to help you effectively segment your email audience and build deeper relationships to move prospects through the sales funnel.

## Personalize contact engagement

Go beyond a broad brush approach and deliver email content that your customers want.

Company Surge<sup>®</sup> for Marketo helps you customize content based on the topics that your contacts are interested in and the intensity of that consumption, so you can drive better engagement with your email marketing programs.

### What is Intent data?

Data that is collected about web users' content consumption or 'observed behavior' that can provide insight about their interests and from this indicates potential 'intent' to take an action. Bombora provides B2B Intent data at unprecedented global scale.

### What is Company Surge<sup>®</sup> data?

Derived from Intent data, Company Surge<sup>®</sup> data indicates when a business starts consuming content on a B2B topic much more than they normally do, according to historical data and benchmarks. It identifies when businesses are actively researching products or services signaling purchase intent.



# Select your Intent topics

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## We need to know, what you want to know!

Bombora has over **13,500 B2B Intent topics**.

You will need to examine Bombora's taxonomy and identify the Intent topics that are most relevant to your products or services and audience.

Once you have selected your topics, you will need to provide this list to your Bombora Account Manager.

They will setup your account so that these topics are pushed through to Marketo.

## Handy links

- The full Bombora taxonomy can be downloaded at: [bombora.com](https://bombora.com)
- Bombora resources: [bombora.com/resources](https://bombora.com/resources)
- Bombora products: [bombora.com/products/](https://bombora.com/products/)
- Bombora Company Surge for Email™ FAQs: [bombora.com/blog/faq/company-surge-for-email/](https://bombora.com/blog/faq/company-surge-for-email/)

If you need help assessing which topics would best suit your product or services and audience, please contact your Bombora Customer Success Manager.



# Overview: Configure Company Surge<sup>®</sup> for Marketo

## A few easy steps to configure Company Surge<sup>®</sup> for Marketo

There is a **one-time configuration** required to set up Company Surge<sup>™</sup> for your Marketo account. The following table outlines what you need to do and why.

- 1 Enabling 'updatedAt'**  
*Enable 'updateAt' attribute for your instance.*
- 2 Creating a role**  
*Create a new role for Bombora in your Marketo account.*
- 3 Create API Only User**  
*Set API only user permissions in your Marketo account.*
- 4 Create LaunchPoint service**  
*Enable Bombora to make a call to your Marketo account via API.*
- 5 Gather Munchkin ID info**  
*Enable Bombora to connect Company Surge<sup>™</sup> data to your Marketo account.*
- 6 Creating a 'Custom Object'**  
*Create a place in your Marketo account for your customized Company Surge<sup>™</sup> dataset.*
- 7 Creating 'Custom Object Fields'**  
*Enable mapping of Company Surge<sup>™</sup> data against your database of contacts in Marketo.*
- 8 Validate Integration via Bombora**  
*Configure Marketo authorization credentials, select topics, and create topic clusters.*

### What you will need:

- Admin permission to your Marketo account
- Marketo license that includes 'Custom Objects'

If you need help with the configuration of your Marketo account, please contact your Bombora Customer Success Manager.

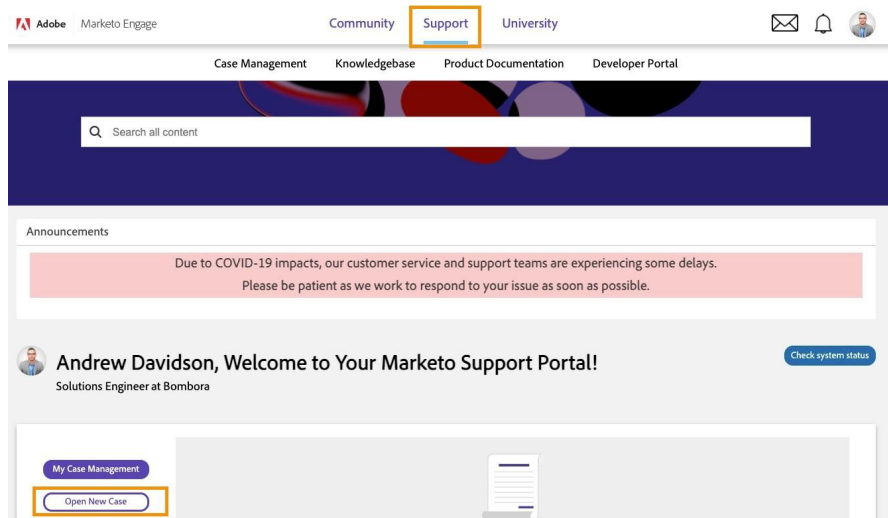
# 1 - Enabling 'updatedAt'

Enable 'updateAt in your instance.

## Getting started

Visit [nation.marketo.com](https://nation.marketo.com) and login using your Marketo credentials.

Click on the 'Support' tab at the top of the screen, then click 'Open New Case'



## Step 1

Fill in Case Info as detailed below:

- Subject: Enable updateAt attribute for my instance
- Description: Enable the updatedAt attribute for our account at [instance name/instance ID]\*
- Case Type: Help me setup/create
- Case Issue: System configuration
- Email CC List: [gcs@bombora.com](mailto:gcs@bombora.com)

**\*NOTE:** Find your instance ID in Marketo under Admin->Web Services. It's the 9 digit ID in the "Endpoint" field after "https://". Exp ID = 123-BKK-789)

## Step 2

Submit Case

# 2 - Creating a role

Create a new role for Bombora in your Marketo account.

## Getting started

Log into your Marketo account and click on the **Admin** menu at the top of the page.

On the sidebar menu, under **'Security'**, click **'Users & Roles'**

Go to the Roles tab

Click **'New Role'**

## Step 1

Enter the following details:

Role Name      Bombora Company Surge

Description      Bombora Company Surge

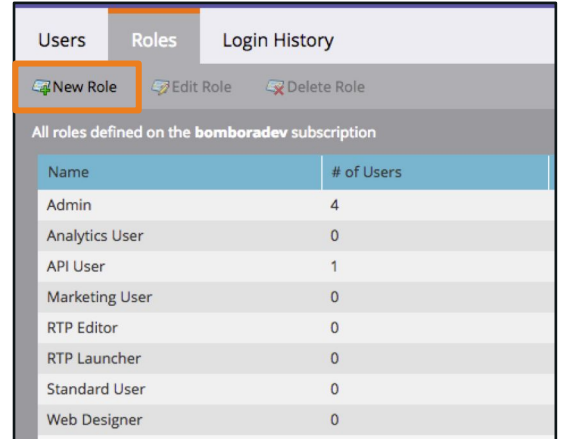
## Step 2

Expand **'Access API'** node in the permissions tree

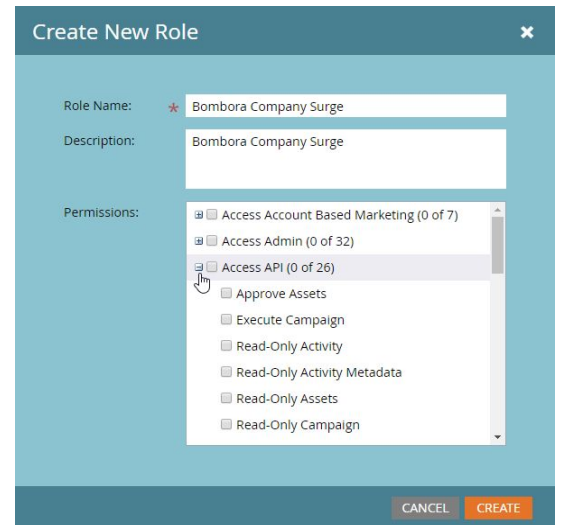
## Step 3

Select the following:

- Read-Only Person
- Read-Only Activity
- Read-Only Assets
- Read-Write Custom Object



Name	# of Users
Admin	4
Analytics User	0
API User	1
Marketing User	0
RTP Editor	0
RTP Launcher	0
Standard User	0
Web Designer	0



**Create New Role**

Role Name: \* Bombora Company Surge

Description: Bombora Company Surge

Permissions:

- Access Account Based Marketing (0 of 7)
- Access Admin (0 of 32)
- Access API (0 of 26)
  - Approve Assets
  - Execute Campaign
  - Read-Only Activity
  - Read-Only Activity Metadata
  - Read-Only Assets
  - Read-Only Campaign

**CANCEL** **CREATE**

# 3 - Create API Only User

Set up Bombora as a known API user in your Marketo account.

**Getting started** Log into your Marketo account and click on the **Admin** menu at the top of the page.

On the sidebar menu, under 'Security', click 'Users & Roles'

Click 'Invite New User'

**Step 1** Enter the following details:

Email: (Ask your Bombora Account Team for your Organizations Unique Email Address)

First Name: Bombora

Last Name: Company Surge

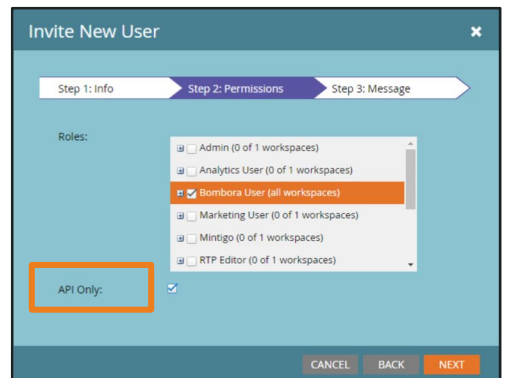
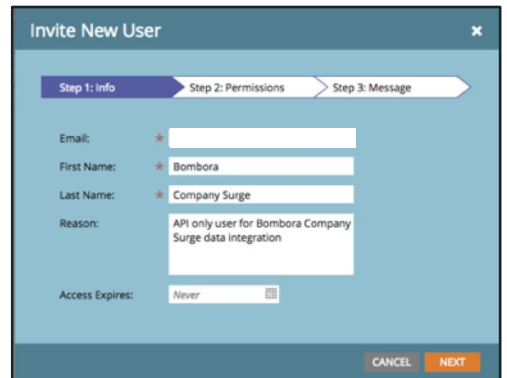
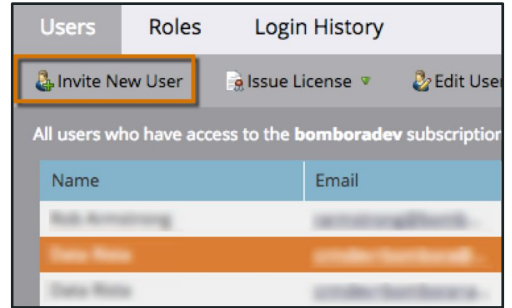
Reason: API only user for Bombora Company Surge data integration

Access Expires: Never

**Step 2** Select Roles > Bombora User

**Step 3** Set 'Permissions' as 'API Only'

**Step 4** Click 'Send' and Bombora will be added as a user and will be displayed in the 'Users and Roles' listing.





# 4 - Create LaunchPoint service

Enable Bombora to make a call to your Marketo account via API.

**Getting started** Log into your Marketo account and click on the **Admin** menu at the top of the page.

On the sidebar menu, under 'Integration', click 'Launchpoint'.

Click 'New'

**Step 1** Enter the following details:

**Display Name:** Bombora Company Surge API

**Service:** Custom

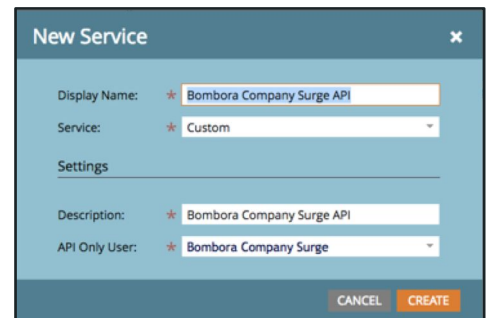
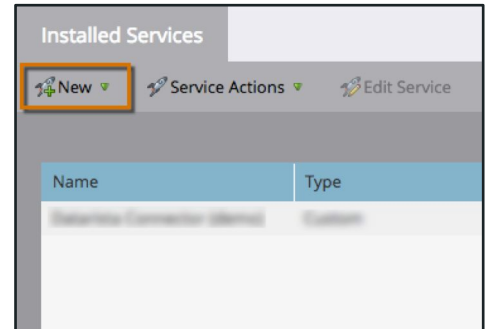
**Description:** Bombora Company Surge API

**API Only User:** Select your organizations' unique email address provided by Bombora Account Team

**Step 2** Click 'Create' and 'Bombora Company Surge' will be added to LaunchPoint and displayed in the 'Installed Services' listing.

**Step 3** Click on 'View Details' of the listing.

Copy the 'Client ID' and 'Client Secret' values. This information is required to connect Company Surge™ data to your account (page 15).



Save this information for later (page 15).

# 5 - Gather Munchkin ID info

Enable Bombora to connect Company Surge® data to your Marketo account.

## Getting started

Log in to your Marketo account and click on the **Admin** menu at the top of the page.

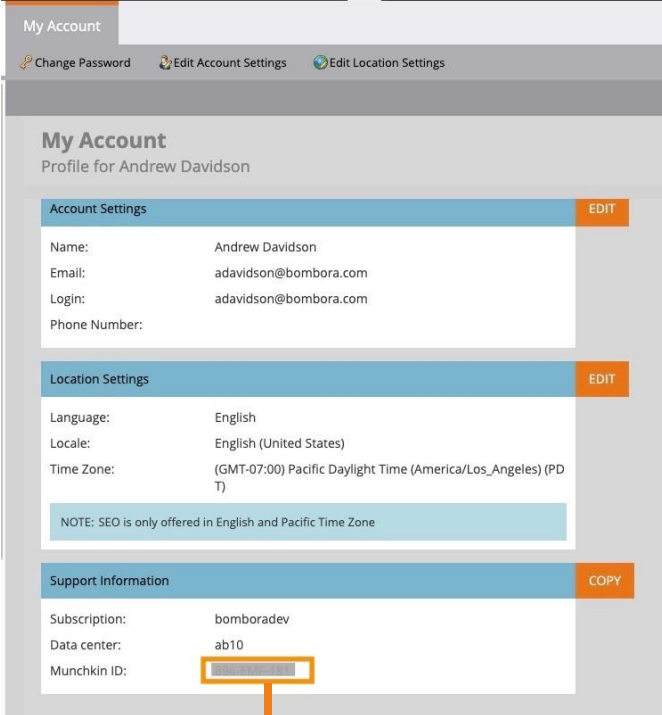
On the sidebar menu click **'My Account'**.

## Step 1

Scroll down to the section **'Support Information'** (located at the bottom of the page).


Copy the **'Munchkin ID'** value.

This information is also required to connect Company Surge® data to your account (page 15).



The screenshot shows the 'My Account' page for Andrew Davidson. It includes sections for Account Settings, Location Settings, and Support Information. The Munchkin ID field in the Support Information section is highlighted with a yellow box. An orange arrow points from this box to a callout box at the bottom right.

My Account	
Profile for Andrew Davidson	
<b>Account Settings</b> <span>EDIT</span>	
Name:	Andrew Davidson
Email:	adavidson@bombora.com
Login:	adavidson@bombora.com
Phone Number:	
<b>Location Settings</b> <span>EDIT</span>	
Language:	English
Locale:	English (United States)
Time Zone:	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles) (PDT)
NOTE: SEO is only offered in English and Pacific Time Zone	
<b>Support Information</b> <span>COPY</span>	
Subscription:	bomboradev
Data center:	ab10
Munchkin ID:	<input type="text" value=""/>

 Save this information for later (page 15).

# 6 - Create a 'Custom Object'

Create a place in your Marketo account for your customized Company Surge® dataset.

## Getting started

Log into your Marketo account and click on the 'Admin' menu at the top of the page.

On the sidebar menu, under 'Database Management', click 'Marketo Custom Objects'

Click 'New Custom Object'

## Step 1

Enter the following details:

Display Name: Bombora Surge

API Name: bomboraSurge\_c

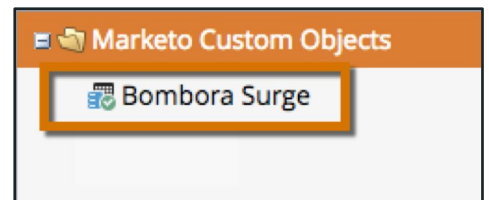
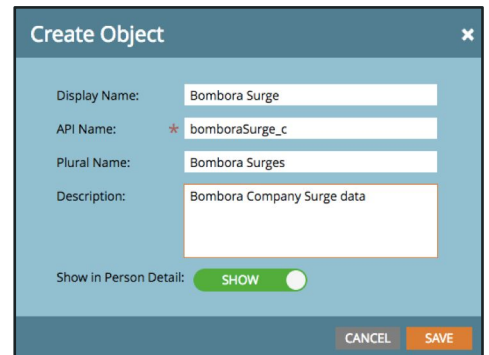
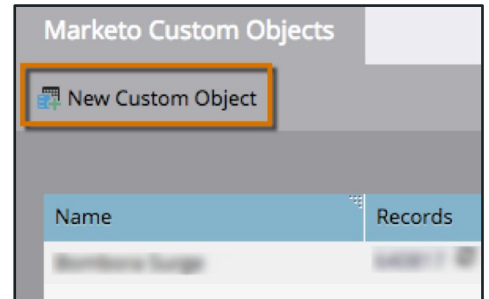
Plural Name: Bombora Surges

Description: Bombora Company Surge data

Show in Person Details: Show

## Step 2

Click 'Save' and 'Bombora Surge' will be added to the 'Marketo Custom Objects' sidebar.



# 7 - Create 'Custom Object Fields'

Enable mapping of Company Surge® data against your database of contacts in Marketo.

## Getting started

Log into your Marketo account and click on the 'Admin' menu at the top of the page.

On the sidebar menu, under 'Database Management', click 'Marketo Custom Objects'.

On the right-hand sidebar find and click on 'Bombora Surge', click onto the 'Fields' tab.

Click 'New Field'

## Step 1

Enter the following details to create the 'leadId' field:

*\*Note: This info is only required for the 'leadId' field.*

**Display Name:** leadId  
**API Name:** leadId  
**Description:** *Optional*  
**Data Type:** link  
**\*Link Object:** Person  
**\*Link Field:** Id  
**\*Dedupe Field:** Yes

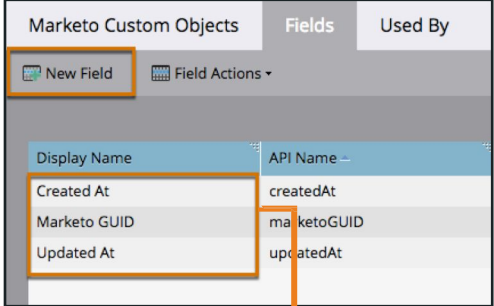
*\*Note: See next page for details*

## Step 2

Click 'Save' and the 'leadId' will be added to the 'Fields' display listing.

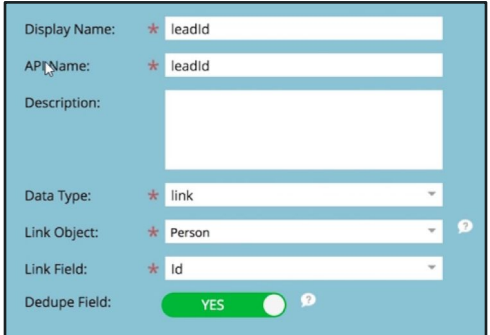
## Step 3

Repeat the above 'New Field' process for all fields outlined in the table on the next page.



Display Name	API Name
Created At	createdAt
Marketo GUID	marketoGUID
Updated At	updatedAt

Marketo will automatically create these required fields.



Display Name: \* leadId  
API Name: \* leadId  
Description:  
Data Type: \* link  
Link Object: \* Person  
Link Field: \* Id  
Dedupe Field: YES

*It is critical that field information is entered exactly as provided (i.e. case sensitive) to enable mapping of Company Surge® data.*

# 7 - Create 'Custom Object Fields' (continued)

Table 1. Bombora Company Surge<sup>®</sup> required fields

Display Name	API Name	Type	Dedupe?
Average Score	AVERAGE_SCORE	integer	No
Cluster name	CLUSTER_NAME	string	No
*leadId (link field)	leadId	link	Yes
Level	LEVEL	string	No
Date Stamp	DATE_STAMP	date	No
Domain	DOMAIN	string	No
**Surge ID	SURGE_ID	string	Yes
Topics	TOPICS	text	No
Total Surging	TOTAL_SURGING	integer	No

*It is critical that field information is entered exactly as provided (i.e. the 'API Name' is case sensitive) to enable mapping of Company Surge<sup>®</sup> data.*

*For your ease, we have provided this table with the correct values. Please copy and paste this information when creating these fields.*

*If you have any questions or would like help to check this fields, please contact your Bombora Account Manager.*

*\*Note: "leadId" was created in the previous step*

*\*\*Note: "Surge\_ID" must have Dedupe turned on*

Display Name	API Name	Type	State
Average Score	AVERAGE_SCORE	integer	✔ Approved
Cluster Name	CLUSTER_NAME	string	✔ Approved
Created At	createdAt	datetime	✔ Approved
Date Stamp	DATE_STAMP	date	✔ Approved
Domain	DOMAIN	string	✔ Approved
leadId	leadId	link	✔ Approved
Level	LEVEL	string	✔ Approved
Marketo GUID	marketoGUID	string	✔ Approved
Surge ID	surgeID	string	✔ Approved
Topics	TOPICS	text	✔ Approved
Total Surging	TOTAL_SURGING	integer	✔ Approved
Updated At	updatedAt	datetime	✔ Approved



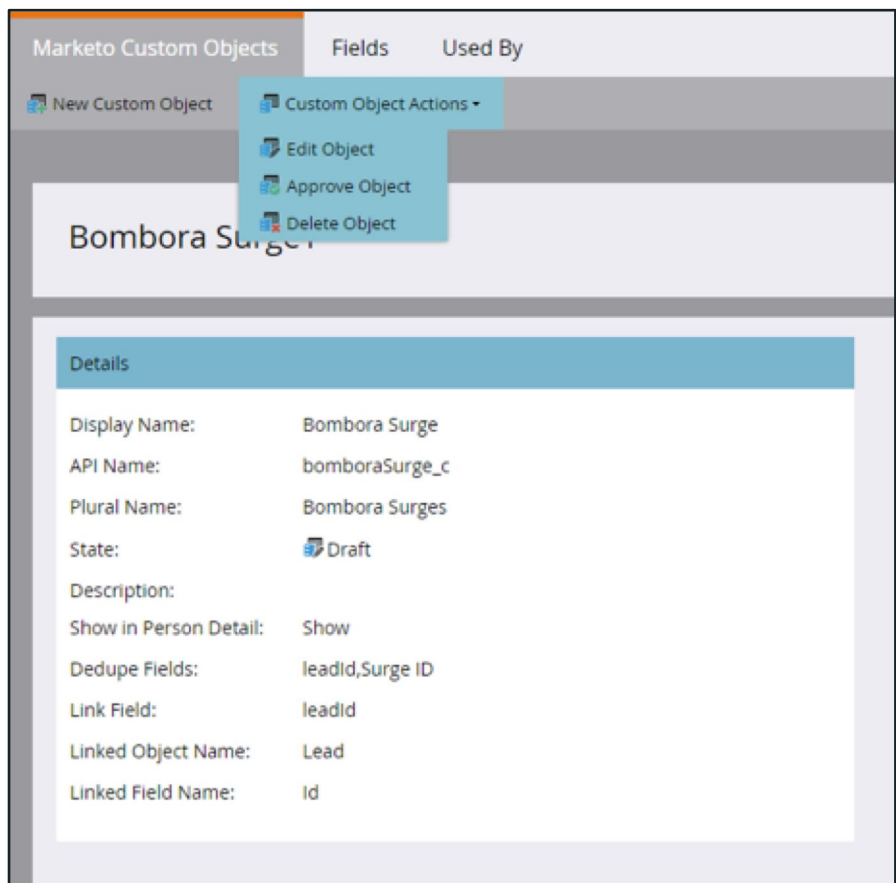
# 7 - Create 'Custom Object Fields' (continued)

## Step 4


After creating all of the required fields, click back to the 'Marketo Custom Objects' tab.

Select the 'Custom Object Actions' menu and click 'Approve Object'. Click the 'Approve' button to confirm.

When completed, the listings in the 'Fields' tab will show 'Approved' under the 'State' column.



The screenshot displays the Marketo Custom Objects interface. At the top, there are tabs for 'Marketo Custom Objects', 'Fields', and 'Used By'. Below the tabs, there is a 'New Custom Object' button and a 'Custom Object Actions' dropdown menu. The dropdown menu is open, showing options: 'Edit Object', 'Approve Object', and 'Delete Object'. The main content area shows the details for a custom object named 'Bombora Surge'. The details are as follows:

Details	
Display Name:	Bombora Surge
API Name:	bomboraSurge_c
Plural Name:	Bombora Surges
State:	 Draft
Description:	
Show in Person Detail:	Show
Dedupe Fields:	leadId, Surge ID
Link Field:	leadId
Linked Object Name:	Lead
Linked Field Name:	Id

# 8 - Validate Integration via Bombora

Configure Marketo authorization credentials, select topics, and create topic clusters.

**Step 1** Log into your Bombora account and click on the 'Integrations' tab at the top of the page.

Under the 'Connect to a Platform' section, click 'Connect' for Marketo.

**Step 2** Input the corresponding Marketo authorization credentials:

**Client ID:** Marketo Client ID value (pg. 9)

**Client Secret:** Marketo Client Secret value (pg. 9)

**Account ID:** Marketo Munchkin ID value (pg. 10)

**Step 3** Select topics and create clusters within Bombora's UI.

**Step 4** Once topics have been selected, and any desired clusters created, click "Connect".

The screenshot shows the Bombora 'Integrations' page. The 'Integrations' tab is selected in the top navigation. The main heading is 'Connect to a Platform'. Below this, there are several platform cards: Outreach, Marketo, Eloqua, LinkedIn, HubSpot, and Salesforce. The Marketo card is highlighted with an orange border. Below the platform cards is a 'Connect to Marketo' form with three input fields: 'Client ID' (with placeholder 'Enter Client ID'), 'Client Secret' (with placeholder 'Enter Client Secret'), and 'Account ID' (with placeholder 'Enter Account ID'). Below the form is a 'Topics' selection interface. It has a search bar, a 'Filter Topics by Theme' dropdown, and a list of topics including .NET, 1031 Exchange, 1125 Media Inc, 128 Technology, 15Five, 2-in-1 PCs, 2Vianet (VNET), 2Checkout, and 2D Animation. To the right of the list is a 'Selected Topics (0 Selected)' area with an 'Add Cluster' button. At the bottom of the page is a large orange 'Connect' button.



# Surf's up. Let's take off.

For more information, please  
contact your Bombora  
Customer Success Manager.