

Bombora Company Surge® for Salesforce Application

Installation guide

September 2020

Package - Spring 2020 (Version 3.1)



bombora

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Contents

Page #

Package install and page layout configuration

Install Bombora application in Salesforce	3 - 4
Configure account and lead page layout(s)	4 - 7

Company Surge® data update functionality explained (accounts and/or leads)

Company Surge® data update - scheduled, automatically, or manually	8
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Remote site settings and apex class scheduling

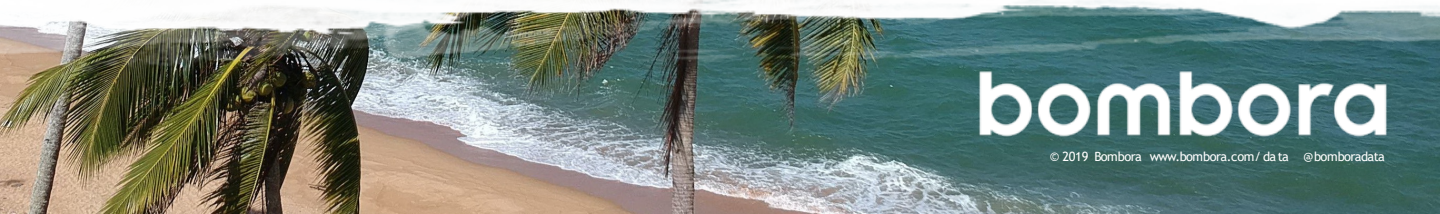
Add remote site settings	9
Scheduling 'BomboraCleanRuleScheduler' apex	10 - 11
Scheduling Bombora account or lead apex	12 - 13
Rescheduling apex	14

Account login access and data integration rules

Grant account login access to Bombora	15
Configure and activate 'Data Integration Rule' for accounts and/or leads	16 - 17

Optional configuration

Optional: Bombora 'Read-Only' fields (accounts and/or leads)	18 - 19
Optional: Create and set up 'Bombora Lead Company Surge® Record Settings'	20 - 21
Contact information	22



Package install and page layout configuration

Install Bombora application in Salesforce

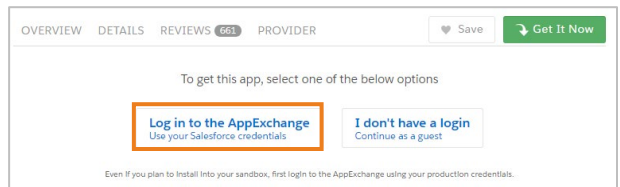
- 1 Go to **Salesforce AppExchange** and find the Bombora Application.

[Link to Bombora Package](#)

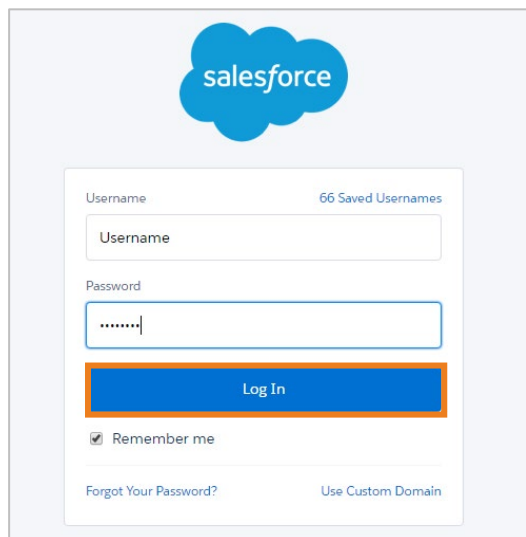
- 2 Click on the 'Get It Now' link.



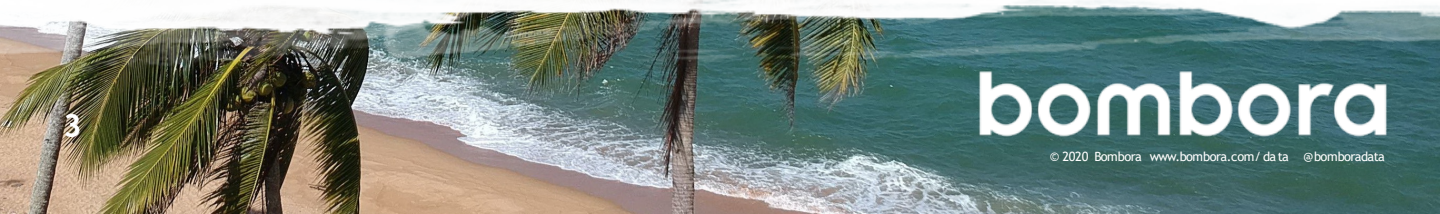
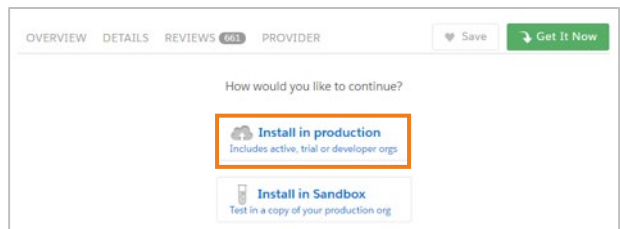
- 3 Log in to the AppExchange using your Salesforce credentials.



- 4 Use your username and password to log in.



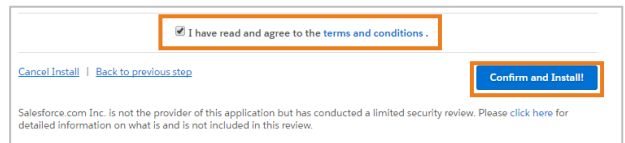
- 5 Install Bombora application in production or in Sandbox.



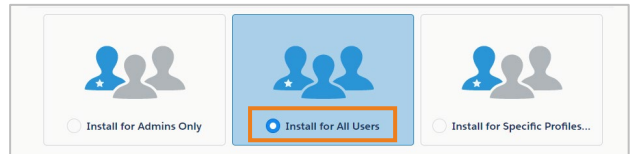
Package install and page layout configuration

Install Bombora application in Salesforce

- 6 Check box to agree to terms and conditions, then click 'Confirm and Install!' button.



- 7 Select 'Install for all Users'.

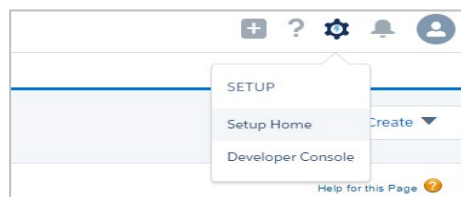


- 8 Once the installation completes, you're ready to continue the rest of the setup.

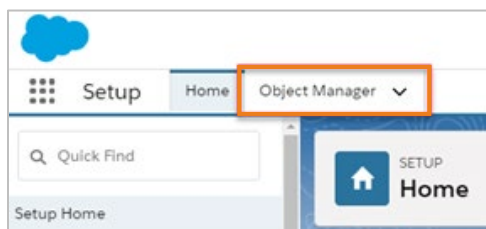
Configure account and lead page layout(s)

This section shows you how to configure account or lead object page layouts for the related lists and custom fields. It's recommended that you complete the account object configuration. If your organization uses the lead object regularly, then it's recommended you complete the lead object configuration as well.

- 9 Use the gear icon in the upper right-hand corner to go to the 'Setup Home' page.



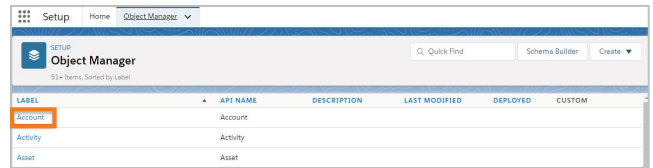
- 10 Click on 'Object Manager.'



Package install and page layout configuration

Configure account and lead page layout(s)

- 11 Select the 'Account' link for account object or 'Lead' for lead object.

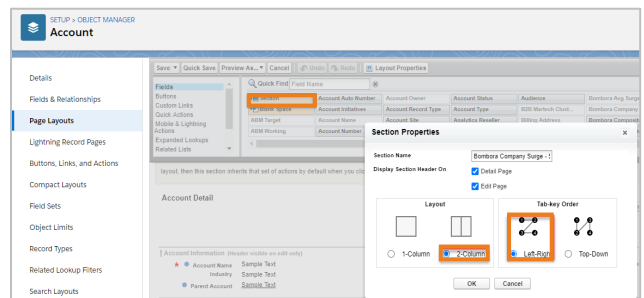


- 12 Scroll down to the 'Page Layouts' section and click on a page layout to edit.



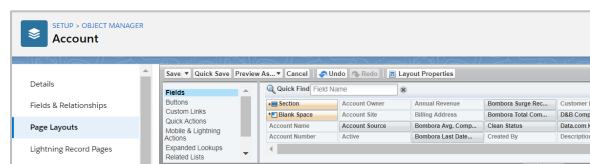
- 13 Drag a 'Section' to a location on the page layout where you would like to locate Bombora Company Surge® summary custom fields.

Label the section 'Bombora Company Surge - Summary' select 2-Column, Left-Right and click 'OK.'



- 14 Choose the 'Fields' menu then locate the fields noted below and add them to the 'Bombora Company Surge - Summary' section created in the previous step.

- 'Bombora Surge Record Count'
- 'Bombora Avg. Composite Score'
- 'Bombora Last Date/Time Updated'

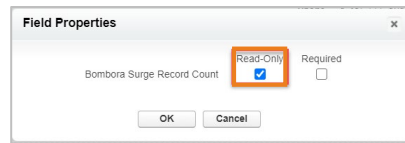


Bombora Company Surge – Summary			
Bombora Surge Record Count	2,317	Bombora Avg. Composite Score	75,399
Bombora Last Date/Time Updated	9/15/2020, 3:05 PM		

Package install and page layout configuration

Configure account and lead page layout(s)

- 15 Click the wrench next to each Bombora field to check the box 'Read Only' on the page layout to make sure these fields are not editable on the layout.



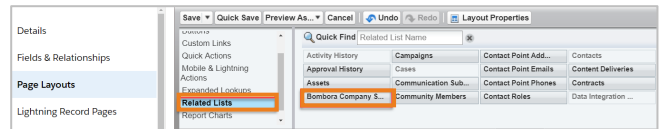
Field Properties

Bombora Surge Record Count

☒ Read-Only ☐ Required

OK Cancel

- 16 Choose the 'Related Lists' menu and find the 'Bombora Company Surge' related list.



Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Quick Find Related List Name

Activity History Campaigns Contact Point Add... Contacts

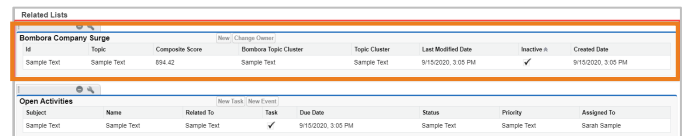
Approval History Cases Contact Point Email... Content Deliveries

Assets Communication Sub... Contracts

Related Lists Bombora Company S... Community Members Contact Roles Data Integration ...

Report Charts

- 17 Drag and drop the 'Bombora Company Surge' related list onto the page layout.



Related Lists

Bombora Company Surge

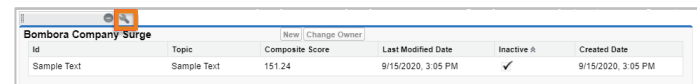
New / Change Owner						
ID	Topic	Composite Score	Bombora Topic Cluster	Topic Cluster	Last Modified Date	Inactive
Sample Text	Sample Text	894.42	Sample Text	Sample Text	9/15/2020, 3:05 PM	✓

Open Activities

New Task / New Event						
Subject	Name	Related To	Task	Due Date	Status	Priority
Sample Text	Sample Text	Sample Text	✓	9/15/2020, 3:05 PM	Sample Text	Sample Text

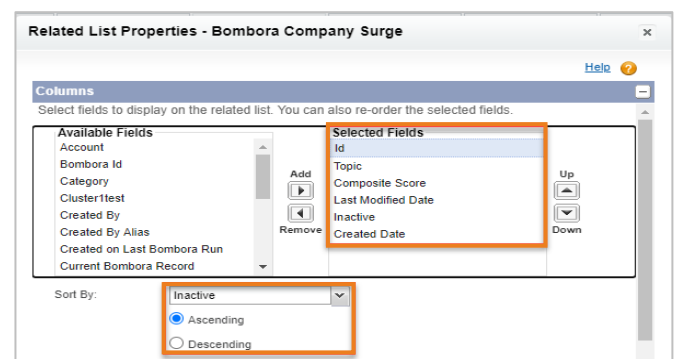
- 18 Toggle the wrench on the 'Bombora Company Surge' related list to select the fields noted below to be shown and 'Sort By' the 'inactive' field in Ascending Order:

- ID
- Topic
- Composite Score
- Last Modified Date
- Inactive
- Created Date



Bombora Company Surge

New / Change Owner					
ID	Topic	Composite Score	Last Modified Date	Inactive	Created Date
Sample Text	Sample Text	151.24	9/15/2020, 3:05 PM	✓	9/15/2020, 3:05 PM



Related List Properties - Bombora Company Surge

Columns

Select fields to display on the related list. You can also re-order the selected fields.

Available Fields

- Account
- Bombora Id
- Category
- ClusterTest
- Created By
- Created By Alias
- Created on Last Bombora Run
- Current Bombora Record

Add Remove

Selected Fields

- Id
- Topic
- Composite Score
- Last Modified Date
- Inactive
- Created Date

Up Down

Sort By:

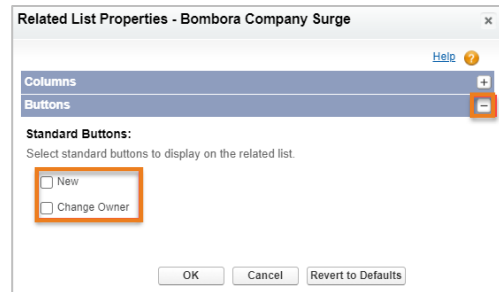
Inactive

☒ Ascending ☐ Descending

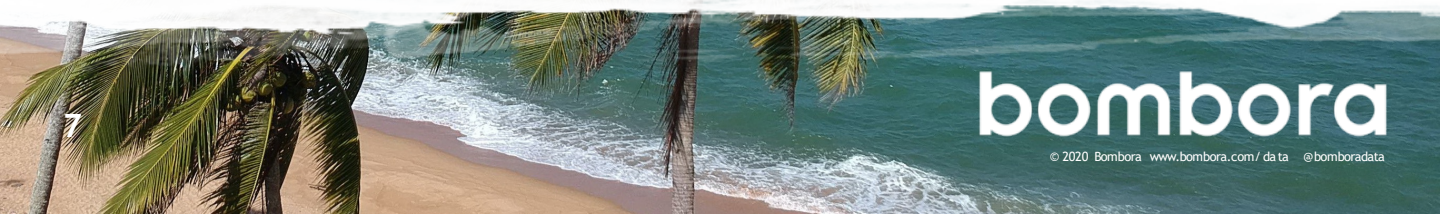
Package install and page layout configuration

Configure account and lead page layout(s)

- 19 Expand 'Buttons' and uncheck the 'New' and 'Change Owner' checkboxes.



- 20 Save your page layout changes and repeat steps 2.4 - 2.11 for any additional account or lead page layouts.



Company Surge® data update functionality explained (accounts or leads)

The data sync occurs in three different ways.

Scheduled mass update (primary update method)

The 'BomboraCleanRuleScheduler' Apex Class enables an automated weekly refresh of the Bombora Company Surge® data across all records in your instance. *Complete the following two sections to configure the 'Remote Site Setting' and schedule the 'BomboraCleanRuleScheduler' to enable automated weekly refresh of the Company Surge® data.

Update on record create or record edit

The data service will run automatically when an account record is created and has a valid website address or a lead record has a valid email address. The record will be appended with Bombora Company Surge® custom object records (assuming the data integration rule is set to active).

Ad-hoc mass update

If needed, you can manually kickoff a mass update of all the Company Surge® data related to your account or lead records. To do this, go to the related data integration rule, click 'Deactivate' and after the page loads click 'Activate'.

Account Data Integration Rule
Bombora Purchase Intent Information

Rule Details [Edit Rule Settings](#) [Edit Field Mapping](#) [Deactivate](#)

Name	Bombora Purchase Intent Information
Description	Integrates Bombora purchase intent information with accounts.
Object	Account
Data Service	Bombora
Update all records (recommended)	☒
Bypass triggers	☐
Bypass workflow rules	☐
Leave last-modified information unchanged	☐
Current Status	Active

Account Data Integration Rule
Bombora Purchase Intent Information

Rule Details [Edit Rule Settings](#) [Edit Field Mapping](#) [Activate](#)

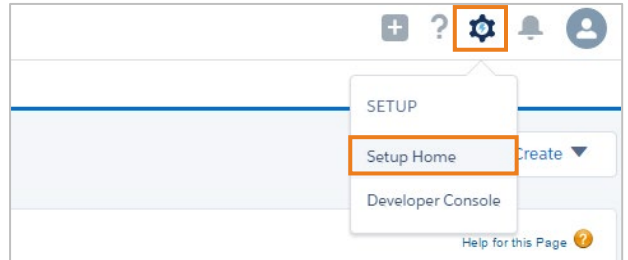
Name	Bombora Purchase Intent Information
Description	Integrates Bombora purchase intent information with accounts.
Object	Account
Data Service	Bombora
Update all records (recommended)	☒
Bypass triggers	☐
Bypass workflow rules	☐
Leave last-modified information unchanged	☐
Current Status	Inactive

Remote site settings and apex class scheduling

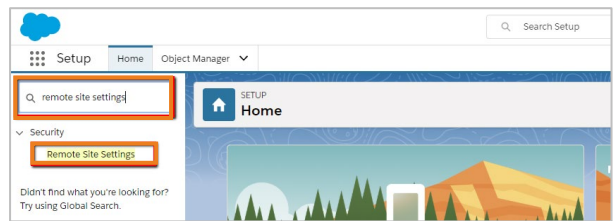
The following section explains how to create a 'Remote Site Setting' used by scheduled apex jobs included in the managed package.

Add remote site settings

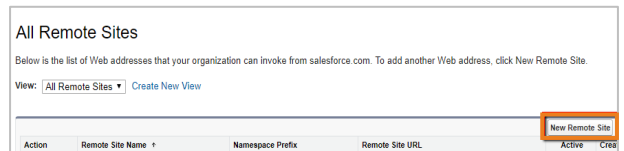
- 21 In Salesforce, use the gear icon in the upper right-hand corner to go to the 'Setup Home' page.



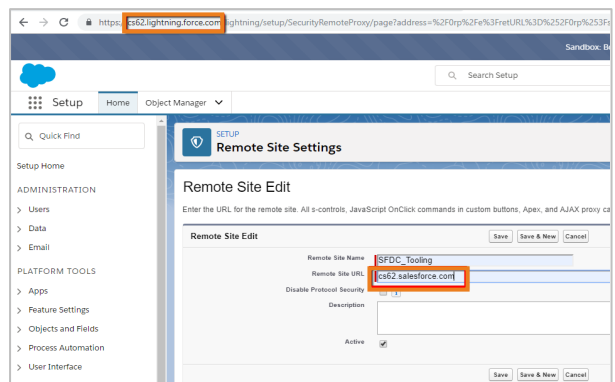
- 22 In the setup quick search, type in 'Remote Site Settings,' and click the link.



- 23 Click the 'New Remote Site' button.



- 24 In the 'Remote Site Name' field, add 'SFDC Tooling.'
- In the 'Remote Site URL' field, add the URL of your current Salesforce org including the 'https://' but make sure to remove the trailing backslash.
- Then click 'Save.'

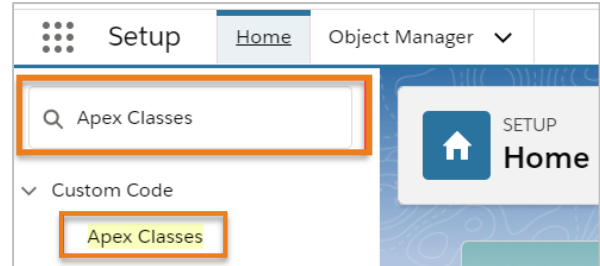


Remote site settings and apex class scheduling

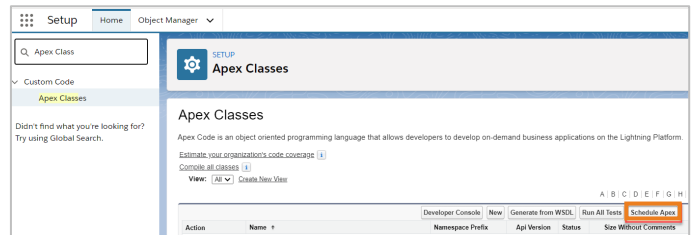
This section shows you how to enable a weekly refresh of Company Surge® data on all records

Scheduling 'BomboraCleanRuleScheduler' apex

- 25 Type in 'Apex Classes' under the Salesforce 'Setup' search bar and click on the link.



- 26 Click on the 'Schedule Apex' button.



- 27 Click the search icon next to the 'Apex Class' field.

Schedule Apex

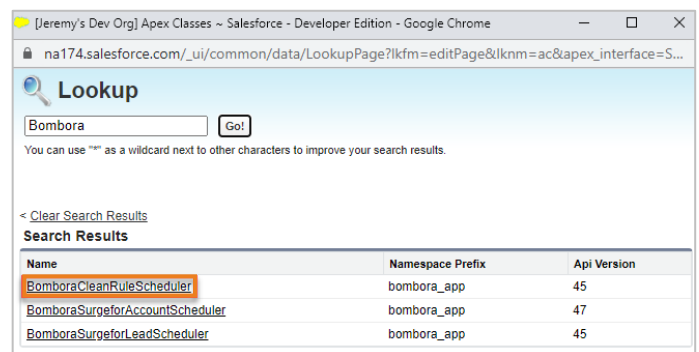
Schedule an Apex class that implements the 'Schedulable' interface to be automatically executed on a regular schedule.

Save Cancel

Job Name

Apex Class 

- 28 Enter 'Bombora' in the search box, click 'Go' and Select the 'BomboraCleanRuleScheduler.'

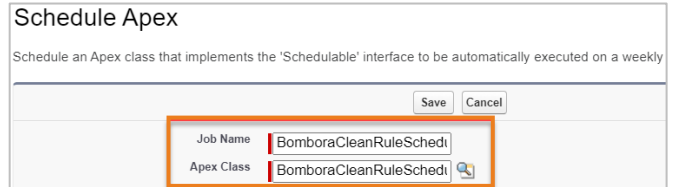


Remote site settings and apex class scheduling

This section shows you how to enable a weekly refresh of Company Surge® data on all records

Scheduling 'BomboraCleanRuleScheduler' apex

- 29 Populate the 'Job Name' field with the same name shown in the 'Apex Class' field. This helps you recognize this record later.



Schedule Apex

Schedule an Apex class that implements the 'Schedulable' interface to be automatically executed on a weekly

Save Cancel

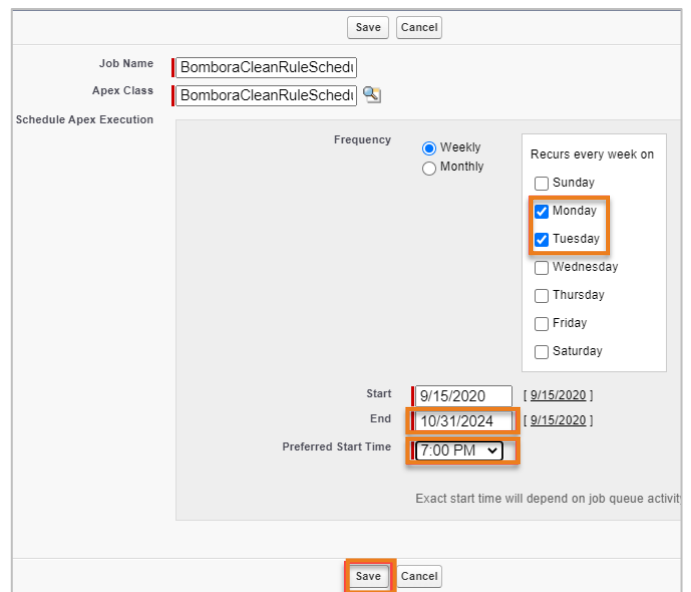
Job Name BomboraCleanRuleScheduler

Apex Class BomboraCleanRuleScheduler

- 30 Schedule the rule to run Monday and Tuesday evenings (7 PM local time). Extend the end date out at least a year, and click 'Save.'

NOTE: Bombora sends program data to Salesforce on Sundays. Typically, Salesforce completes ingestion by mid-day Monday and refreshes your instance. Sometimes, Salesforce completes ingestion on Tuesdays, which is why the job runs on both days.

This ensures the scheduler runs on the most up-to-date data.



Save Cancel

Job Name BomboraCleanRuleScheduler

Apex Class BomboraCleanRuleScheduler

Schedule Apex Execution

Frequency ☒ Weekly ☐ Monthly

Recurs every week on

☐ Sunday

☒ Monday

☒ Tuesday

☐ Wednesday

☐ Thursday

☐ Friday

☐ Saturday

Start 9/15/2020 [9/15/2020]

End 10/31/2024 [9/15/2020]

Preferred Start Time 7:00 PM

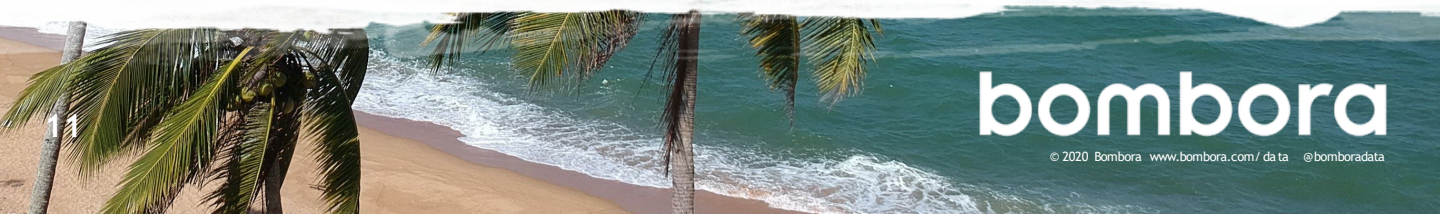
Exact start time will depend on job queue activity

Save Cancel

Once the scheduler has been set up, you can review your scheduled dates under the 'Scheduled Jobs' tab in 'Salesforce Setup.'

All Scheduled Jobs							Help
The All Scheduled Jobs page lists all of the jobs scheduled by your users. Multiple job types may display on this page. You can delete scheduled jobs if you have the permission to do so.							
View: All Scheduled Jobs Create New View							
Action	Job Name	Submitted By	Submitted	Started	Next Scheduled Run	Type	
Manage Del	BomboraCleanRuleScheduler	McGuire, Brendan	5/22/2019 4:14 PM	5/22/2019 5:00 PM	5/29/2019 5:00 PM	Scheduled Apex	

Note: The BomboraCleanRuleScheduler will 'De-Activate' and then 'Re-Activate' the Bombora data integration rules for both accounts and leads if they are set as 'Active' when the scheduled job runs; otherwise the rules will be left unedited.

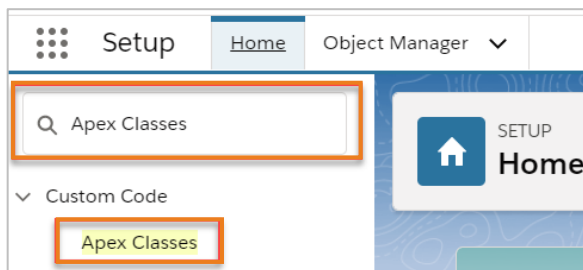


Remote site settings and apex class scheduling

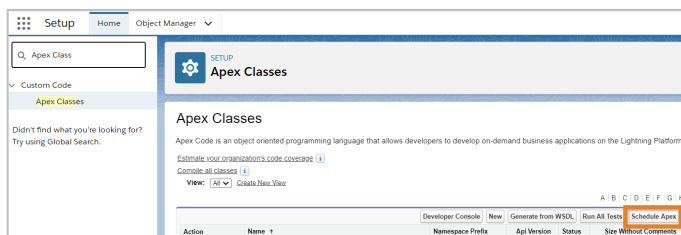
Scheduling the account or lead apex

The following section shows you how to schedule the 'BomboraSurgeforAccountScheduler' and the 'BomboraSurgeforLeadScheduler' apex classes. The account scheduler populates the custom fields on the account object. The lead scheduler populates the lead object custom fields as well as the 'Bombora Lead Surge Record Settings'. Configure the apex according to the related lists/custom fields configured previously.

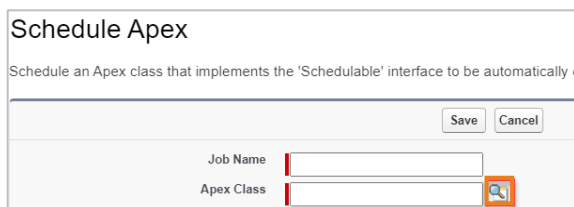
- 31 In the Salesforce 'Setup Home' page, type in 'Apex Classes' in the setup quick search, and click the link.



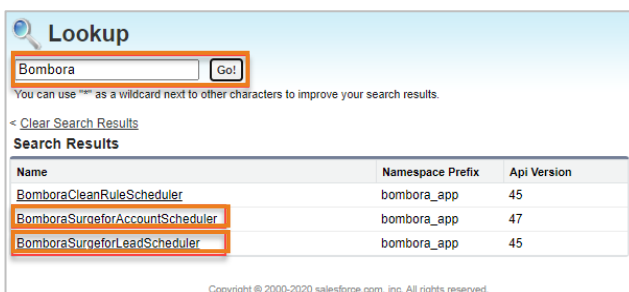
- 32 Click the 'Schedule Apex' button.



- 33 Click the search icon next to the 'Apex Class' field.



- 34 Search for 'Bombora,' then select the 'BomboraSurgeforAccountScheduler' and/or 'BomboraSurgeforLeadScheduler' depending on which of the custom objects you plan to use. If you are using both, then schedule both jobs.



Remote site settings and apex class scheduling

Scheduling Bombora account or lead apex

- 35 Populate the 'Job Name' field with the same name shown in the 'Apex Class' field. This ensures you can recognize the record later.

Schedule Apex

Schedule an Apex class that implements the 'Schedulable' interface to be automatically executed

Save Cancel

Job Name BomboraSurgeforLeadSch

Apex Class BomboraSurgeforLeadSch

- 36 Schedule the frequency of your updates to every night (8 PM preferred start time), set 'End' out at least a year and click 'Save.'

Job Name BomboraSurgeforLeadSch

Apex Class BomboraSurgeforLeadSch

Apex Execution

Frequency ☒ Weekly ☐ Monthly

Recurs every week on

☒ Sunday ☒ Monday ☒ Tuesday ☒ Wednesday ☒ Thursday ☒ Friday ☒ Saturday

Start 9/15/2020 [9/15/2020]

End 10/31/2024 [9/15/2020]

Preferred Start Time 8:00 PM

Exact start time will depend on job queue activity.

Save Cancel

- 37 If scheduling both the account and lead Apex, repeat steps 5.1-5.6 for the other object's Apex scheduler.

Once the scheduler has been set up, you can review your scheduled dates under the 'Scheduled Jobs' tab in 'Salesforce Setup.'

All Scheduled Jobs

The All Scheduled Jobs page lists all of the jobs scheduled by your users. Multiple job types may display on this page. You can delete scheduled jobs if you have the permission to do so.

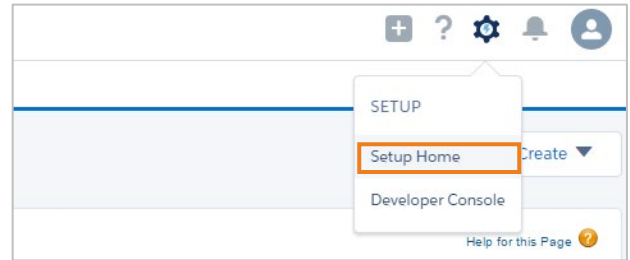
View: All Scheduled Jobs Create New View

Action	Job Name ↑	Submitted By	Submitted	Started	Next Scheduled Run	Type
Manage Del	BomboraSurgeforLeadScheduler	Ingelbrechtsen_Jay	7/24/2019 8:38 AM		7/31/2019 7:00 AM	Scheduled Apex

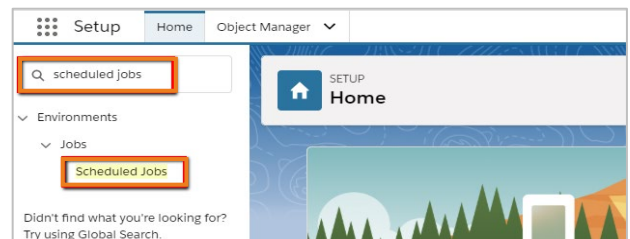
Remote site settings and apex class scheduling

Rescheduling apex

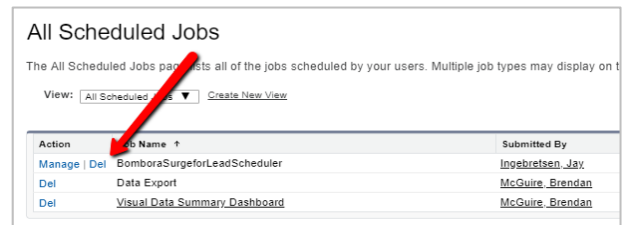
- 38 In Salesforce, use the gear icon in the upper right-hand corner to go to the 'Setup Home' page.



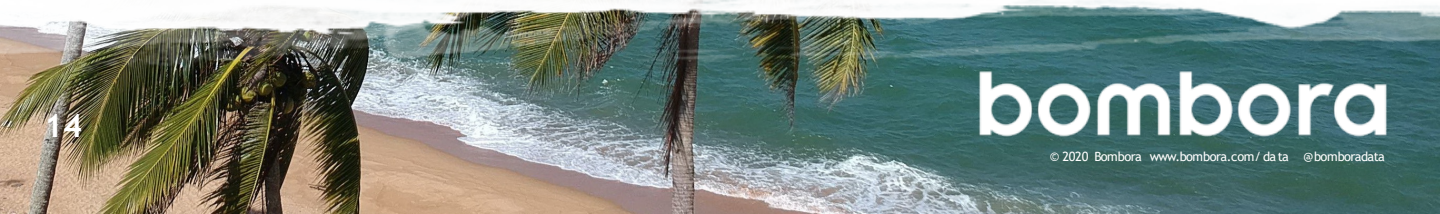
- 39 In the setup quick search, search for 'Scheduled Jobs' and click the link.



- 40 Search for the scheduled job you wish to reschedule and click 'Delete.'



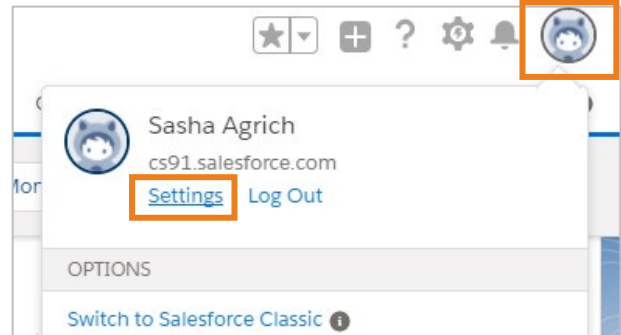
- 41 You are now ready to 'Reschedule' the apex job by scheduling it as if it were new. Refer to the previous two sections based on the apex class you'd like to reschedule.



Account login access and data integration rules

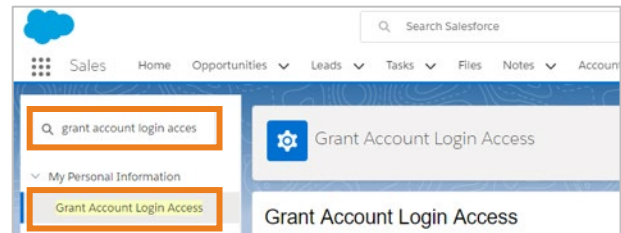
Grant account login access to Bombora

- 42 Go to 'My Settings' in the upper right-hand corner of Salesforce.

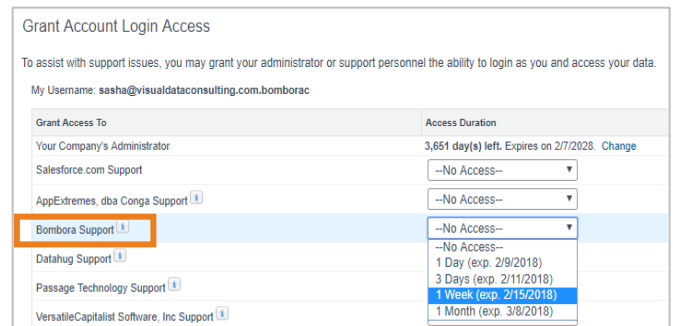


- 43 Search for 'Grant Account Login Access.'

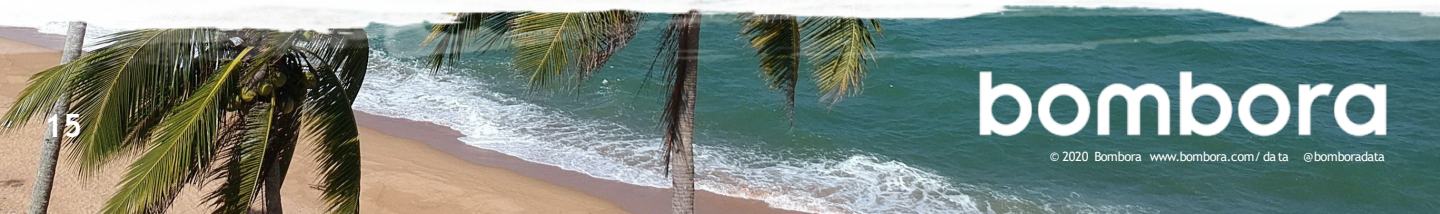
NOTE: In older instances of Salesforce, the 'Grant Account Login Access' link is located under 'Setup' instead of 'My Settings.'



- 44 Grant login access to Bombora for '1 week.'



- 45 Notify Bombora that you have granted access and provide them with a list of your chosen topics.



Account login access and data integration rules

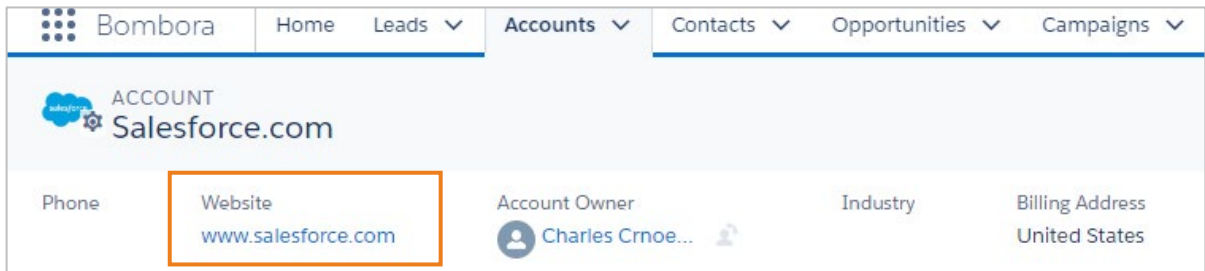
Configure and activate 'Data Integration Rule' for accounts or leads



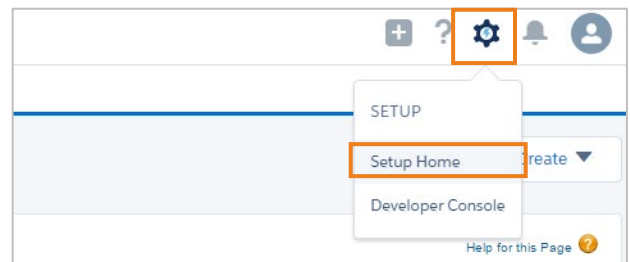
DO NOT ACTIVATE THE DATA INTEGRATION RULES UNTIL BOMBORA CONFIRMS YOUR TOPICS HAVE BEEN CONFIGURED.

Turning on the 'Data Integration Rule' without limiting topics could potentially flood your system with ALL Bombora topic records.

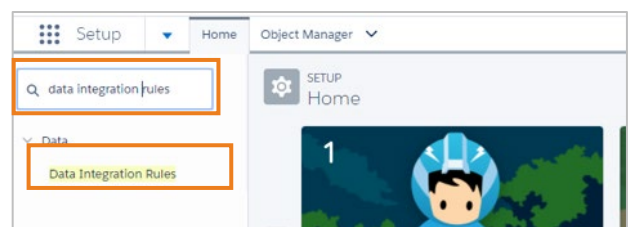
The Bombora Salesforce Application uses the standard 'Website' field on the account object and the standard 'Email' field on the lead object to connect to the Bombora data platform. Therefore, before turning on the Bombora functionality ('Data Integration Rule'), it's recommended that you review your current account records to ensure the 'Website' field is populated.



- 46 In Salesforce, use the gear icon in the upper right-hand corner to go to the 'Setup Home' page.



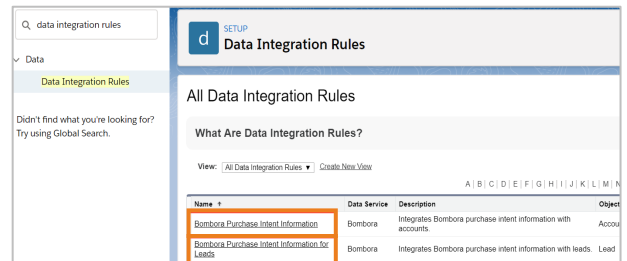
- 47 Search for 'Data Integration Rules' in the setup quick search and click on the 'Data Integration Rules' link.



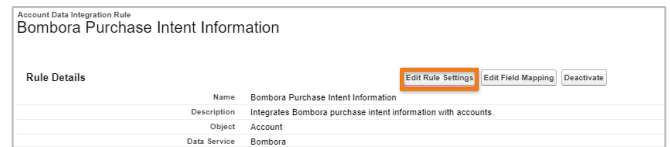
Account login access and data integration rules

Configure and activate 'Data Integration Rule' for accounts or leads

- 48 To enable Bombora on accounts, click on the 'Bombora Purchase Intent Information' link under 'All Data Integration Rules.' To enable Bombora on leads, click on the 'Bombora Purchase Intent Information for Leads' link under 'All Data Integration Rules.'

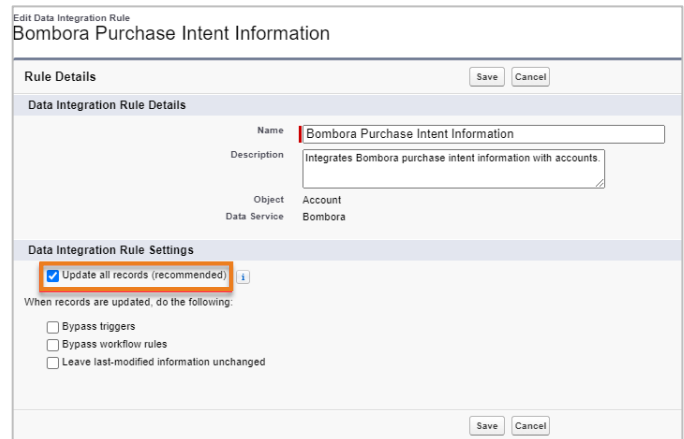


- 49 Prior to activating, click on the 'Edit Rule Setting'



- 50 Enable the 'Update All Records' setting. The additional settings are optional and can be enabled at your discretion.

Click 'Save'.

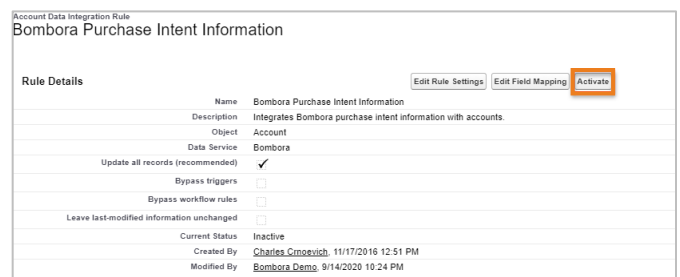


- 51 Review the 'Data Integration Rules' settings (edit, if needed) and click on 'Activate.'

NOTE: PLEASE FIRST ENSURE YOU HAVE RECEIVED CONFIRMATION FROM BOMBORA THAT YOUR TOPICS HAVE BEEN CONFIGURED.

Repeat steps 8.1-8.6 if you will be using both custom objects.

Data will begin flowing immediately upon activation.

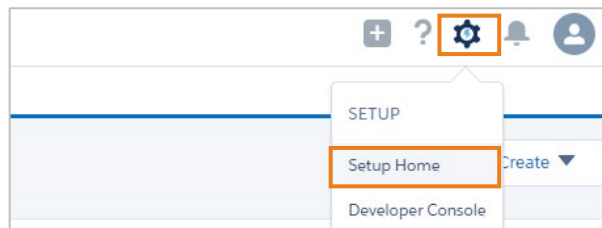


Optional configuration

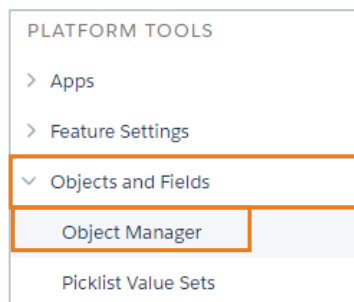
Optional: Bombora 'Read-Only' fields (accounts or leads)

For security reasons, you may choose to make Bombora fields read-only for non-system administrators so they can only be created/updated by the 'Data Integration Rule.'

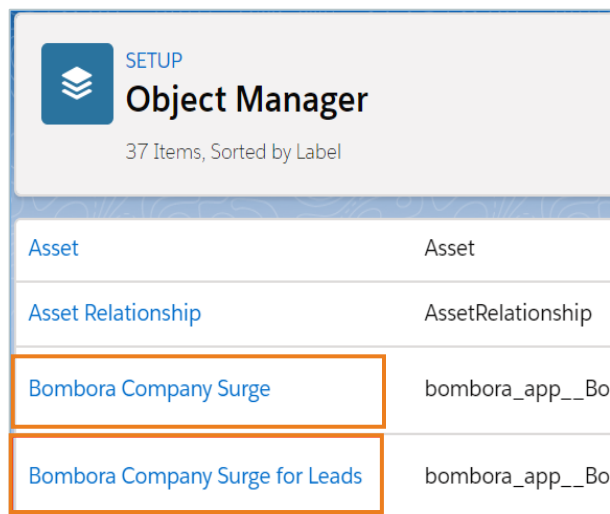
- 52 Use the gear icon in the upper right-hand corner to go to the 'Setup Home' page.



- 53 On the left-hand side, expand 'Objects and Fields' and click on 'Object Manager.'



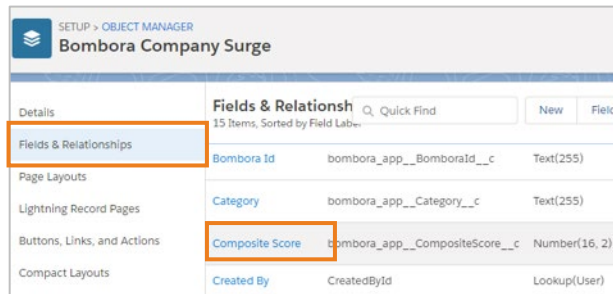
- 54 Click on the 'Bombora Company Surge®' for accounts or 'Bombora Company Surge for Leads' link.



Optional configuration

Optional: Bombora 'Read-Only' fields (accounts or leads)

- 55 Toggle to 'Fields & Relationships' and click on the name of the field to make it 'Read-Only.'



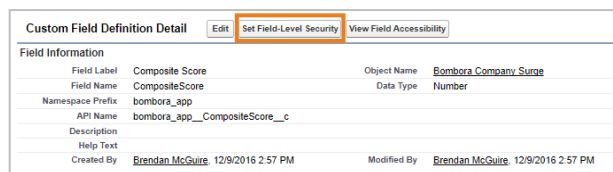
SETUP > OBJECT MANAGER
Bombora Company Surge

Details | **Fields & Relationships** | Quick Find | New | Field

15 Items, Sorted by Field Label

Bombora Id	bombora_app__BomboraId__c	Text(255)
Category	bombora_app__Category__c	Text(255)
Composite Score	bombora_app__CompositeScore__c	Number(16, 2)
Created By	CreatedById	Lookup(User)

- 56 Click on 'Set Field-Level Security.'

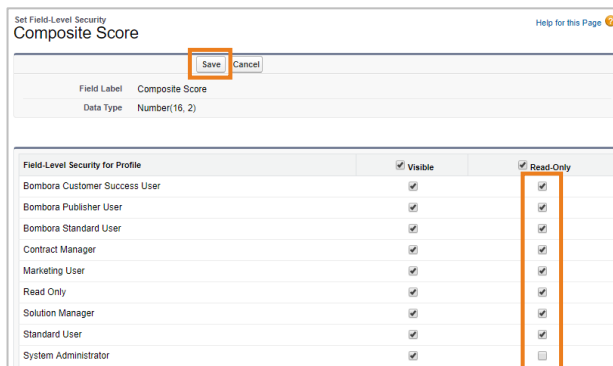


Custom Field Definition Detail | Edit | **Set Field-Level Security** | View Field Accessibility

Field Information

Field Label	Composite Score	Object Name	Bombora Company Surge
Field Name	CompositeScore	Data Type	Number
Namespace Prefix	bombora_app		
API Name	bombora_app__CompositeScore__c		
Description			
Help Text			
Created By	Brendan McGuire	Modified By	Brendan McGuire
	12/9/2016 2:57 PM		12/9/2016 2:57 PM

- 57 Check the 'Read-Only' checkbox for profiles that should not be able to edit the field and click 'Save.'



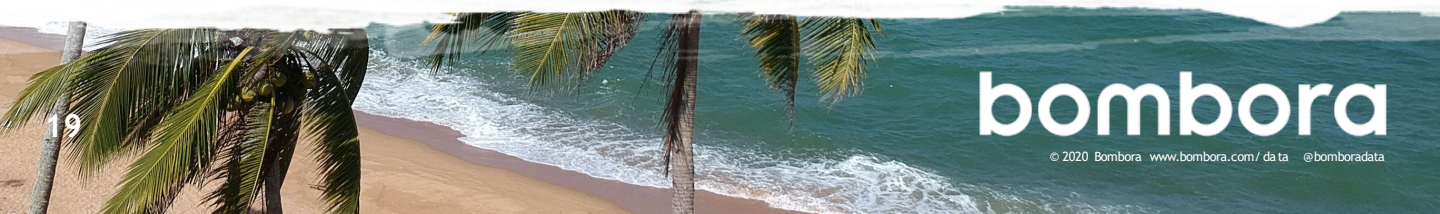
Set Field-Level Security
Composite Score | Help for this Page

Save | Cancel

Field Label	Composite Score
Data Type	Number(16, 2)

Field-Level Security for Profile	Visible	Read-Only
Bombora Customer Success User	☒	☒
Bombora Publisher User	☒	☒
Bombora Standard User	☒	☒
Contract Manager	☒	☒
Marketing User	☒	☒
Read Only	☒	☒
Solution Manager	☒	☒
Standard User	☒	☒
System Administrator	☒	☐

- 58 Repeat for all fields you would like to make 'Read-Only.'



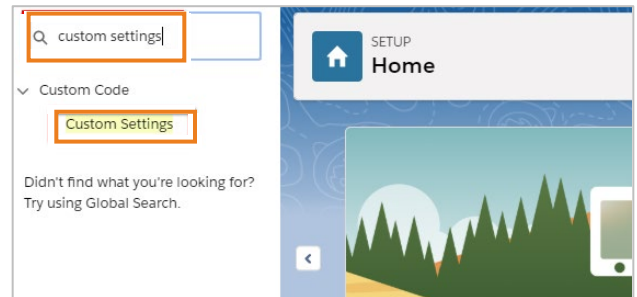
Optional configuration

Create and set up 'Bombora Lead Company Surge® Record Settings'

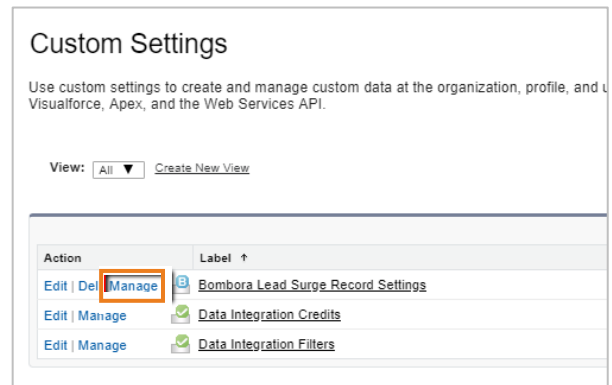
This rule **deletes** the 'Bombora Company Surge for Leads' custom object records that have become 'orphaned.' Records become orphaned due to the lead it's related to becoming converted, deleted, or set to 'Inactive.'

59 Set up custom settings that integrate into the Bombora Company Surge® records.

Go to Salesforce 'Setup Home' and search for 'Custom Settings' and click the link.

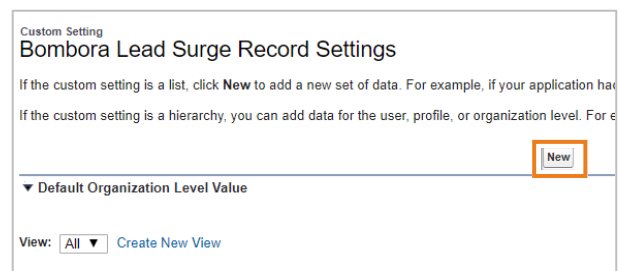


60 Click 'Manage' on the 'Bombora Lead Surge Record Settings' record.



61 If you arrive at this screen and there are settings present, you will only need to click 'Edit' to change the settings.

If there are no settings present, click 'New' in the 'Default Organization Level Value' section.



Optional configuration

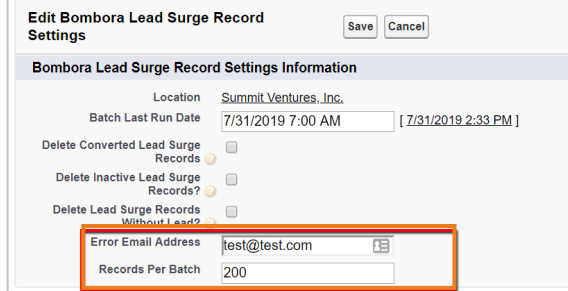
Create and set up 'Bombora Lead Company Surge® Record Settings'

- 62 Fill out the 'Error Email Address' with the email you would like any errors that arise to be delivered. Now fill out the 'Records Per Batch' field.

This will determine how many records to run at a time. The default is 200, and we recommend you do not exceed this number.

Bombora Lead Surge Record Settings Edit

Provide values for the fields you created. This data is cached with the application.



Edit Bombora Lead Surge Record Settings [Save] [Cancel]

Bombora Lead Surge Record Settings Information

Location: Summit Ventures, Inc.

Batch Last Run Date: 7/31/2019 7:00 AM [7/31/2019 2:33 PM]

Delete Converted Lead Surge Records? ☐

Delete Inactive Lead Surge Records? ☐

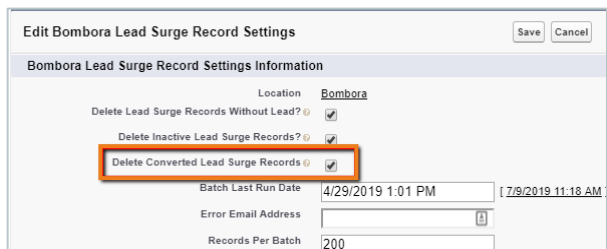
Delete Lead Surge Records Without Lead? ☐

Error Email Address: test@test.com

Records Per Batch: 200

- 63 Select among three checkboxes to control the rule itself:

- 'Delete Converted Lead Surge Records' will *delete* 'Bombora Lead Surge' records that are associated to 'Converted' leads.
- 'Delete Inactive Lead Surge Records' will *delete* 'Bombora Lead Surge' for records that are *no longer active*. This is connected to a Bombora topic that has been deactivated by your org.
- 'Delete Lead Surge Records Without Lead' will *delete* 'Bombora Lead Surge' records that are not associated with any lead. This happens when an attached leads gets deleted.



Edit Bombora Lead Surge Record Settings [Save] [Cancel]

Bombora Lead Surge Record Settings Information

Location: Bombora

Delete Lead Surge Records Without Lead? ☒

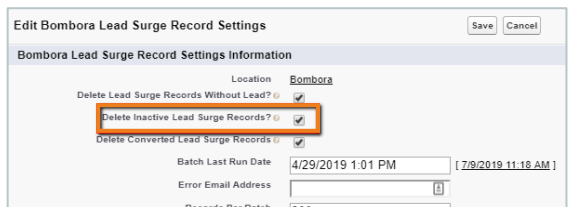
Delete Inactive Lead Surge Records? ☒

Delete Converted Lead Surge Records? ☒

Batch Last Run Date: 4/29/2019 1:01 PM [7/9/2019 11:18 AM]

Error Email Address:

Records Per Batch: 200



Edit Bombora Lead Surge Record Settings [Save] [Cancel]

Bombora Lead Surge Record Settings Information

Location: Bombora

Delete Lead Surge Records Without Lead? ☒

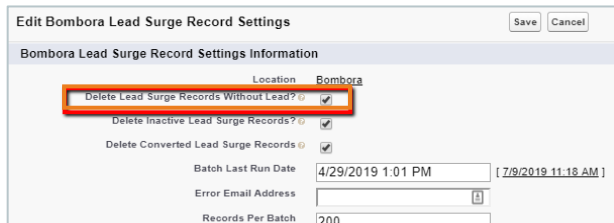
Delete Inactive Lead Surge Records? ☒

Delete Converted Lead Surge Records? ☒

Batch Last Run Date: 4/29/2019 1:01 PM [7/9/2019 11:18 AM]

Error Email Address:

Records Per Batch: 200



Edit Bombora Lead Surge Record Settings [Save] [Cancel]

Bombora Lead Surge Record Settings Information

Location: Bombora

Delete Lead Surge Records Without Lead? ☒

Delete Inactive Lead Surge Records? ☒

Delete Converted Lead Surge Records? ☒

Batch Last Run Date: 4/29/2019 1:01 PM [7/9/2019 11:18 AM]

Error Email Address:

Records Per Batch: 200

Surf's up. Let's take off.

For more information, please
contact us at +1 (646) 759 8900
or email salesforce@bombora.com.



bombora

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