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Installation

This section will walk you through accessing the BombBomb Video for Salesforce integration from the Salesforce AppExchange. If you've already installed the integration using the "Install for Admins only" option, skip forward to the Configuration section.

Finding the App

From Outside of Salesforce

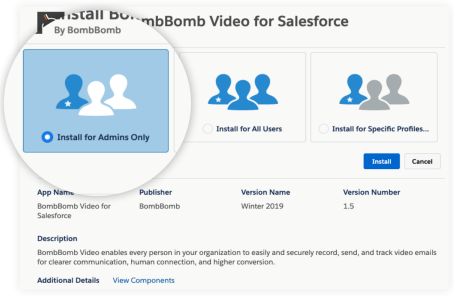
1. In your web browser, go to appexchange.salesforce.com.
2. Search for "BombBomb" in the search bar.
3. Select the "BombBomb Video for Salesforce" option.
4. Click the "Get Now" button.

From Within Salesforce

1. Within your account, click the gearwheel icon in the upper right corner.
2. Select "Setup."
3. In the menu on the left side of the page, click the "Apps" dropdown.
4. Select "AppExchange Marketplace."
5. Search for "BombBomb" in the search bar.
6. Select the "BombBomb Video for Salesforce" option.
7. Click the "Get Now" button.
8. On the pop-up, select "Open Login Screen."
9. Click the "Allow" button on the permissions screen to allow access.

Installing the Package

1. To get started, click the installation link.
2. Select the option for "Install for Admins Only." (Do not select "Install for All Users" or "Install for Specific Profiles" or the app will not work as expected.)
3. Then click "Install" to install the BombBomb Video package.



Configuration

This section will guide you through customizing the presentation and user access to the BombBomb Video Composer.

Deploying a Custom Domain

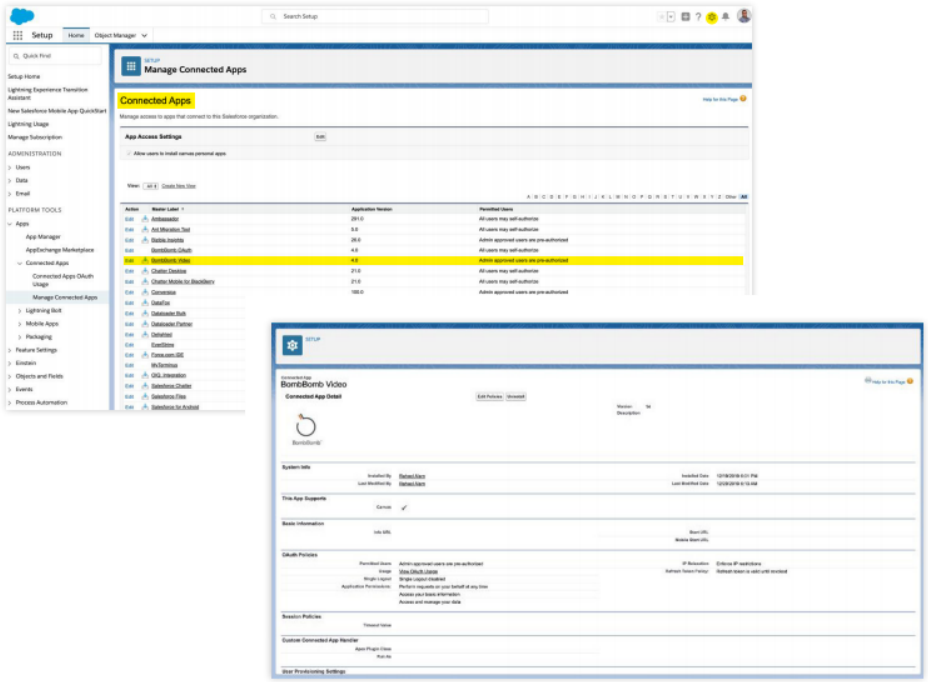
In order to use the BombBomb Lightning component, you must deploy a custom domain for your salesforce org. If your org already has a custom domain, skip this section.

1. Click the "Setup" gearwheel icon.
2. Type "My Domain" in the Quick Find.
3. Follow the on-screen prompts to deploy a custom domain for your org.

This takes approximately 20 minutes and does not interfere with your org's performance.

Configuring the BombBomb Video App

1. Click the "Setup" gearwheel icon.
2. In the Quick Find, Type "Connected Apps."
3. Select "Manage Connected Apps."
4. Click "BombBomb Video."



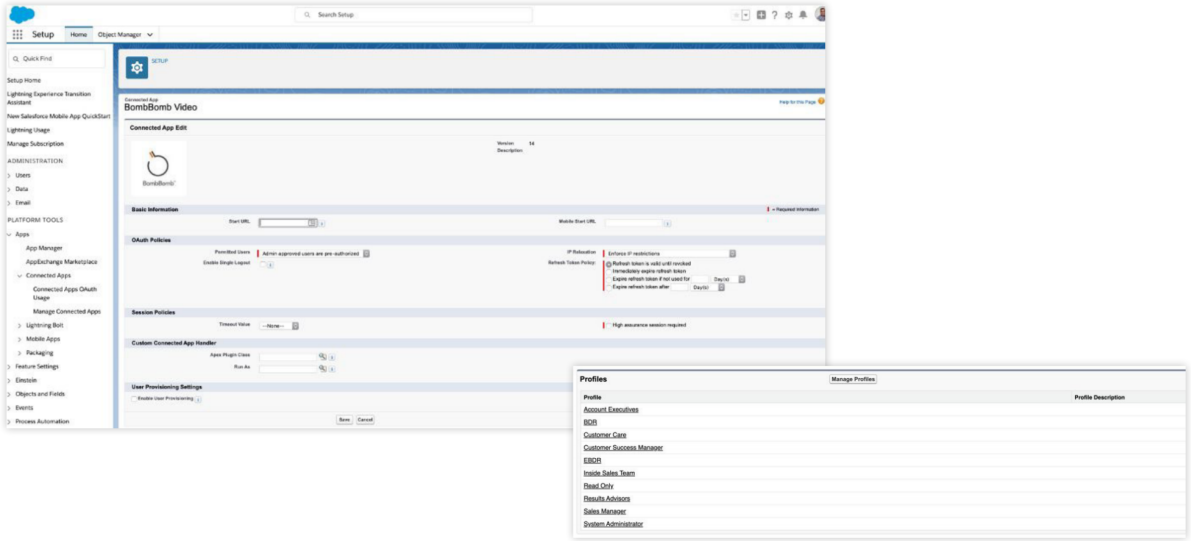
5. You will be taken to the "BombBomb Video" Connected App Details page.

OAuth Authorization

1. Click the "Edit Policies" button.
2. Under the OAuth Policies section, look for the "Permitted Users" dropdown and ensure "Admin approved users are pre-authorized" is selected.
3. Click the "Save" button and you'll be taken back to the Connected App Detail page.

Granting Access Through Profiles

The profiles assigned in this section will be able to authenticate between the BombBomb Video Email Composer and your Salesforce environment.



1. Scroll down to the "Profiles" section.
2. Click the "Manage Profiles" button.
3. Select the profiles that should have access to authenticate with the BombBomb Video component.
4. Once finished, click "Save."

Configuring Permissions

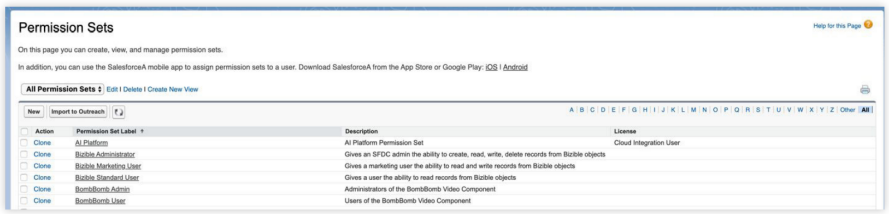
The permission sets assigned in this section will be able to authenticate between the BombBomb Video Email Composer and your Salesforce environment.

The integration comes with two Permission sets: BombBomb User and BombBomb Admin.

A BombBomb User has permission to read and create BB Events, which are used for reporting tracking activity from BombBomb to your Salesforce organization.

A BombBomb Admin has full permission to create, read, update, and delete (CRUD) BB Events, as well as full CRUD access to BB Logs, where any error logs are stored. They also have visibility of the BB Team tab, which allows viewing the BombBomb Team tab directly within Salesforce.

1. In the Quick find, type "Permission Sets."
2. Search for "BombBomb User" and select.
3. Click "Manage Assignments."
4. Check the box next to each user you want to grant BombBomb User access to.
5. Click "Add Assignments."



6. In the Quick find, type "Permission Sets."
7. Search for "Bombbomb Admin" and select.
8. Click "Manage Assignments."
9. Check the box next to each user you want to grant BombBomb Admin access to.
10. Click "Add Assignments."

Adding BombBomb Video Composer to Record Pages

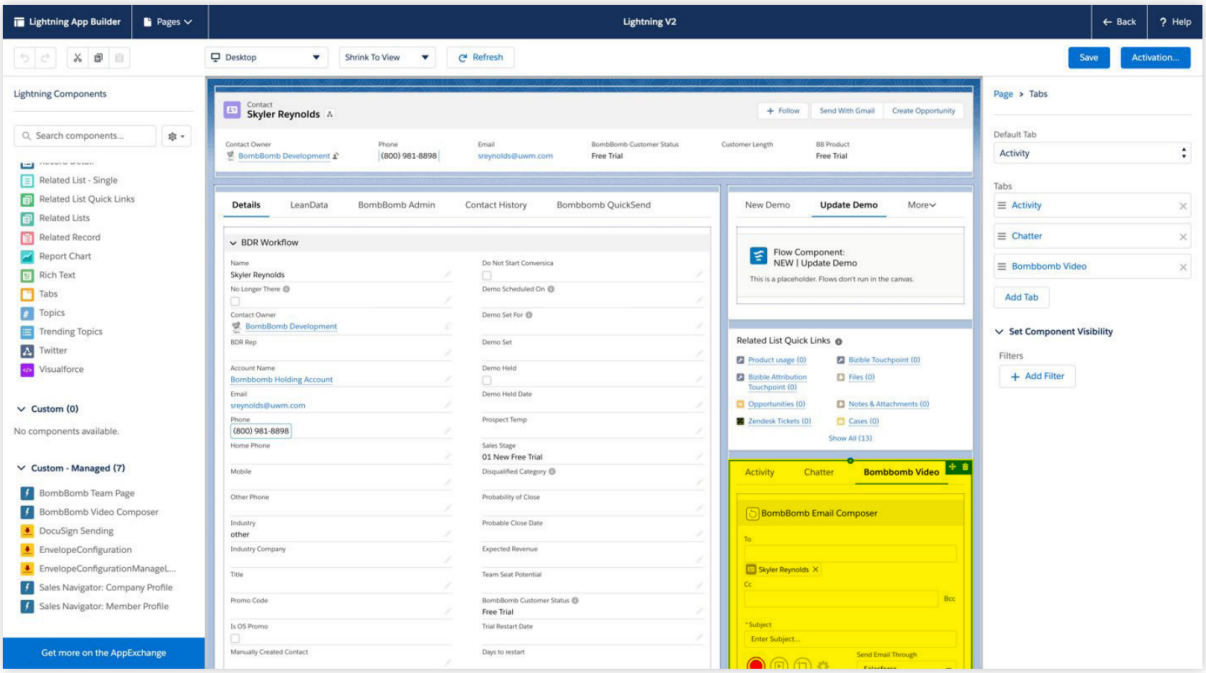
This integration supports the following record types:

- Lead
  - The "To" field is automatically filled based on the Email field.
  - Tracking reports back with the lead's Who ID.
- Contact
  - The "To" field is automatically filled based on the Email field.
  - Tracking reports back with the Contact's Who ID.
- Account
  - The "To" field is automatically filled based on the Contacts belonging to the account.
  - Tracking reports back with each Contact's Who ID.
- Case
  - The "To" field is automatically filled based on the Contact Email.
  - Tracking reports back with the Contact's Who ID.
- Opportunity
  - The "To" field is automatically filled based on the Contact Roles belonging to the opportunity.
  - Tracking reports back with each Contact's Who ID.

For this example, we will walk through adding the BombBomb Video Composer to the Contact record type; however the steps are similar for any record type.

For adding to a Contact Record:

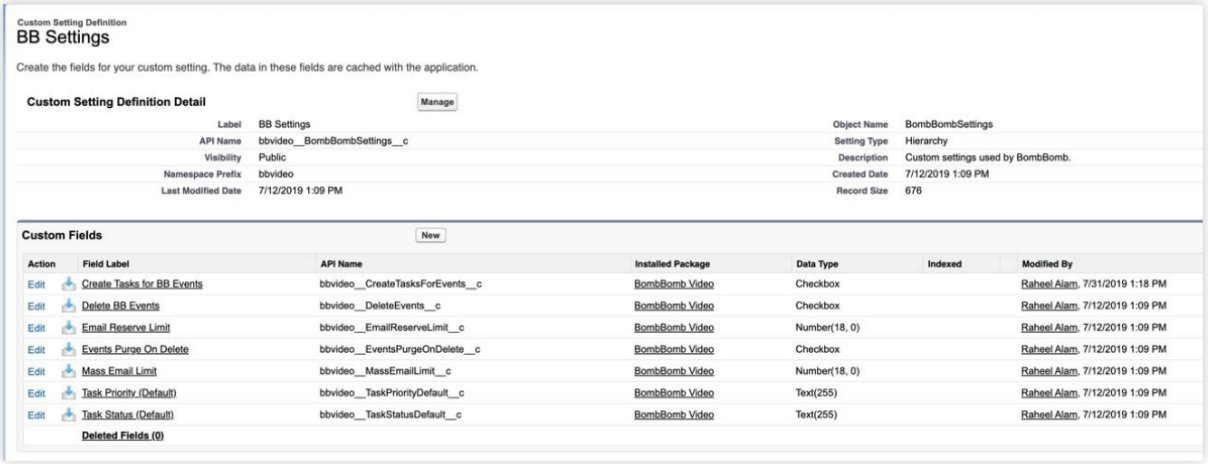
1. Click the "Setup" gearwheel icon.
2. Click "Object Manager."
3. Select "Contact."
4. Click "Lightning Record Pages."
5. Select the Record Page you'd like to add the component to.
6. Click "Edit."
7. Under the components menu on the left, go to the "Custom Managed" section.
8. Search for "BombBomb Video Composer."
9. Click and drag the BombBomb Video Composer to the desired location.
10. Use the "Set Component Visibility" option on the right to configure when the BombBomb Email Composer is visible.
11. Once finished, click "Save."



A user will be prompted to log into their BombBomb account when they click "Record" or "Templates" to send a video their very first time. If they have already logged into their BombBomb account via the BombBomb web application, this step is not required.

Establishing Organization Settings

1. In Setup, access the "Custom Settings" section.
2. Click "Manage" for "BB Settings."
3. If organization defaults have not been established, click "New" to create your organization default settings. Otherwise, click "Edit" to change your setting values.



Below are explanations of the app's settings:

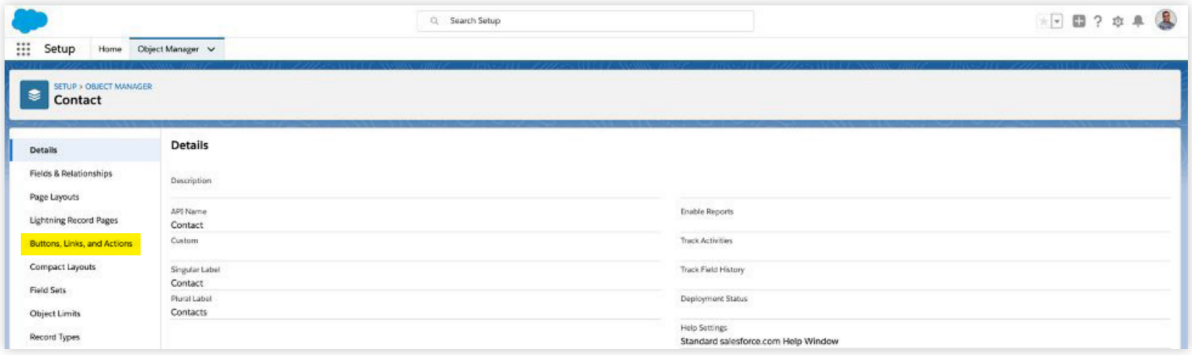
- Create Tasks for BB Events — When a tracking event is received, an activity task is also created on the record with a matching Who ID.
- Delete BB Events — If activity tasks are being created, this setting will delete the BB Event after the task is created.
- Events Purge on Delete — This setting causes deleted BB Events to skip Salesforce's recycle bin (hard delete).
- Email Reserve Limit — When the number of available Salesforce email sends for the day drops to the specified value, sending through Salesforce is disabled, and only BombBomb's email servers can be used for sending.
- Mass Email Limit — The number of allowed email addresses when sending through Salesforce. When exceeded, the composer will switch to sending through BombBomb's email servers.
- Send Email from Bombbomb by Default — If checked, the "Send Through" option defaults to BombBomb.
- Respect HasOptedOutOfEmail Setting — Checks Salesforce's standard email opt out field to prevent sending emails to opted out contacts.
- Respect Individual Privacy Settings — Checks Salesforce's standard privacy settings to ensure these settings are followed.

Once you finish configuring your settings, click "Save."

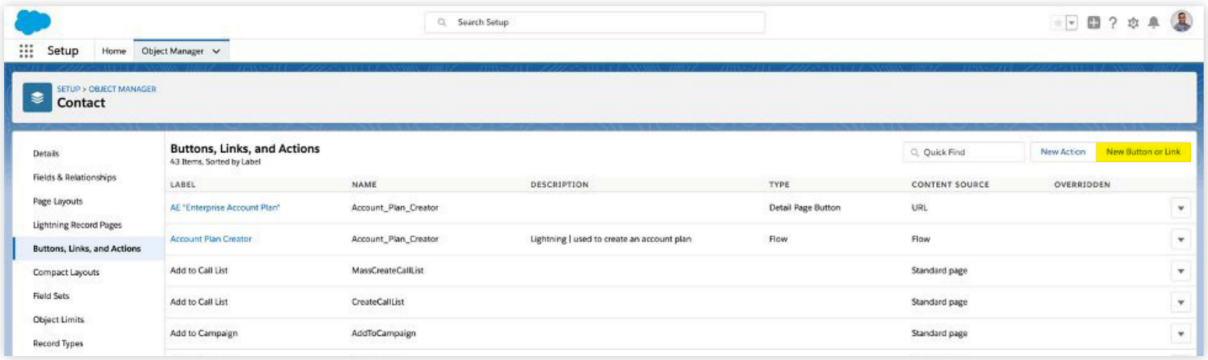
Setting Up List View Sending on the Contact Record

List View sending allows users to select contacts within a list view and compose an email to send to all of them at once. This feature is currently only available for Contact list views.

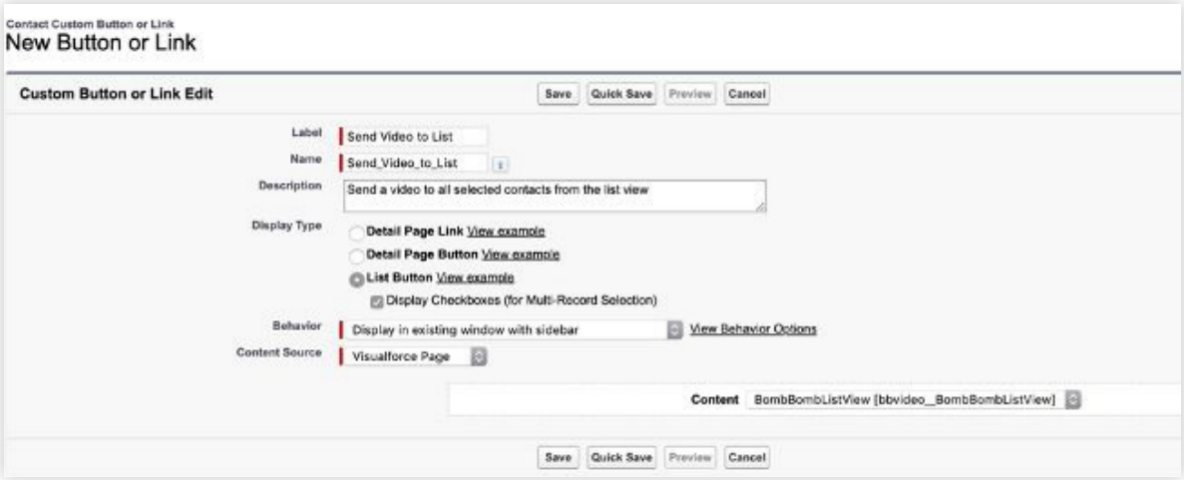
1. Go to the Setup page and click "Object Manager" and then select "Contact."
2. Select "Buttons, LInks, and Actions" in the menu on the left.



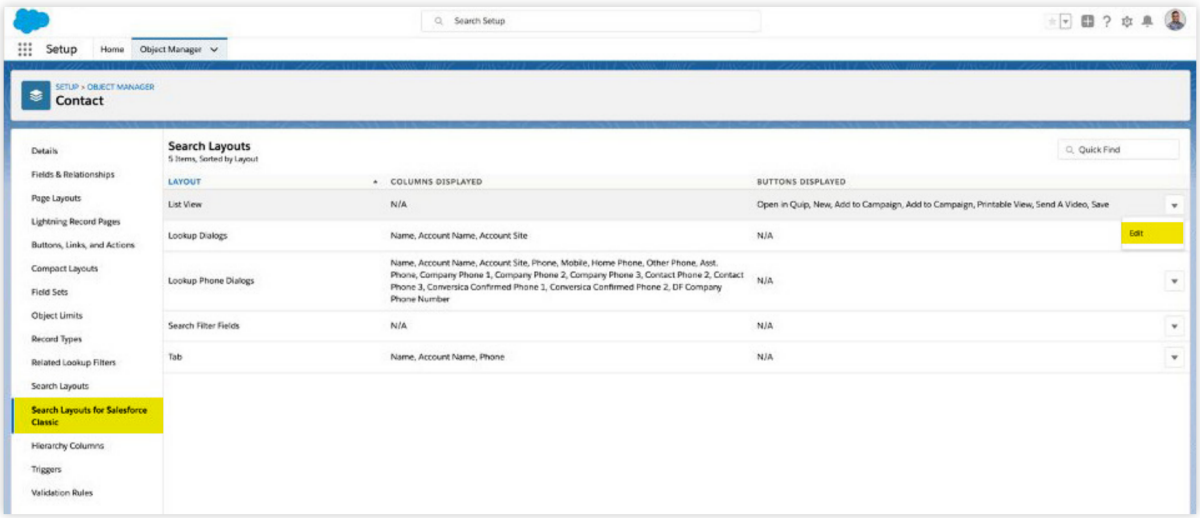
3. Click "New Button or Link" in the upper right corner.



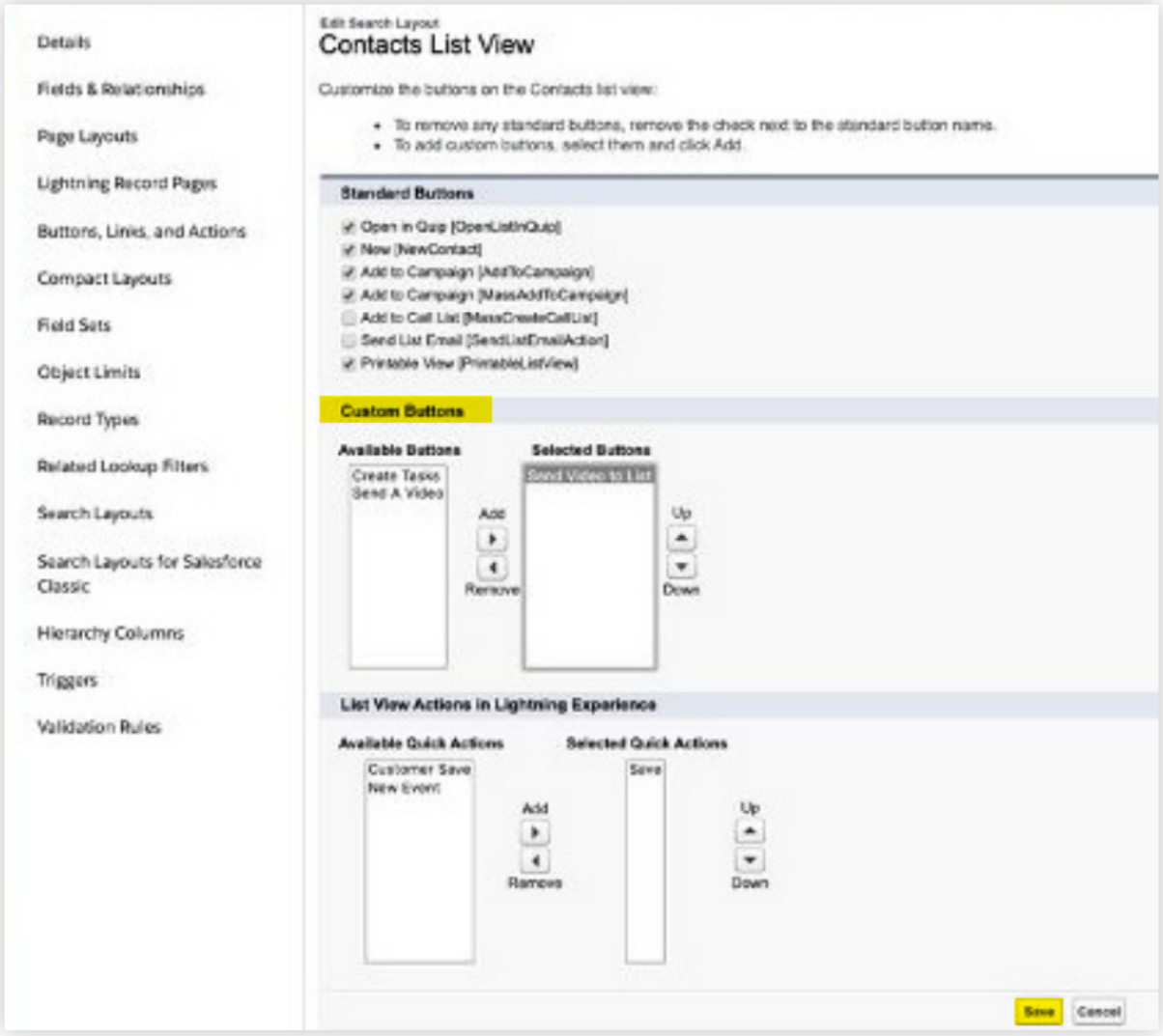
4. Set the following and then click the "Save" button:
    a. Label - Send Video to List
    b. Display Type - List Button (ensure that "Display Checkboxes" is checked)
    c. Behavior - Display in existing window with sidebar
    d. Content Source - Visualforce Page
    e. Content - BombBombListView [bbvideo_BombbombListView]



5. In the menu on the left, click "Search Layouts for Salesforce Classic."



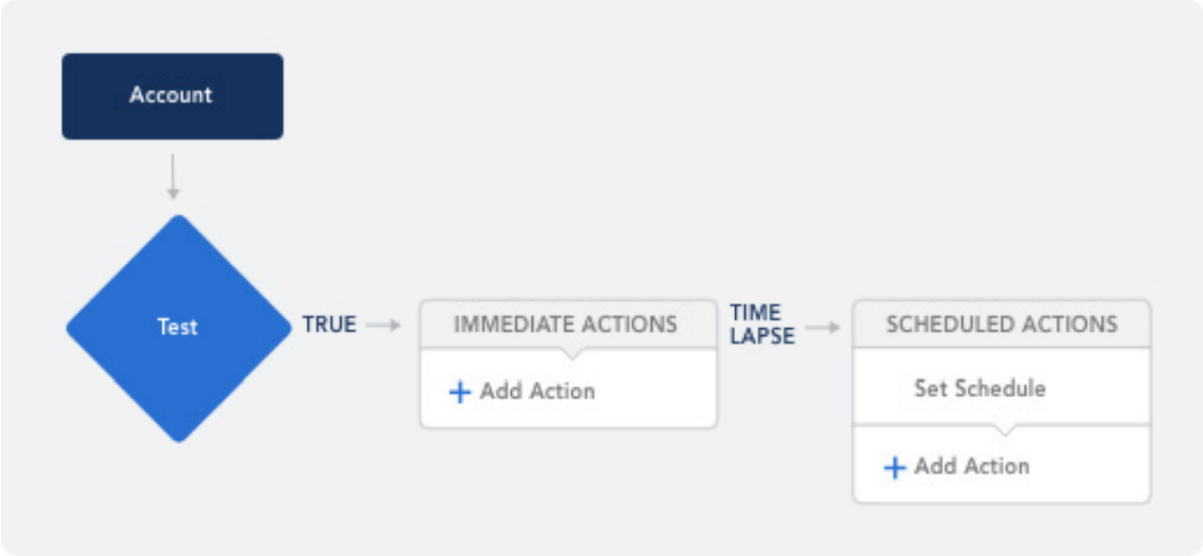
6. Select the layout you want to edit by clicking the dropdown next to the view and click "Edit."
7. On the Contacts List View page, look for the "Custom Buttons" section.
8. Select your newly created button from the list of available buttons.
9. Click "Add Button" to have it appear on the Selected Buttons Side.
10. Click the "Save" button.


Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
Search Layouts for Salesforce Classic
Hierarchy Columns
Triggers
Validation Rules
Edit Search Layout
Contacts List View
Customize the buttons on the Contacts list view:
To remove any standard buttons, remove the check next to the standard button name.
To add custom buttons, select them and click Add.
Standard Buttons
Open in Quip [OpenListInQuip]
New [NewContact]
Add to Campaign [AddToCampaign]
Add to Campaign [MassAddToCampaign]
Add to Call List [MassCreateCallList]
Send List Email [SendListEmailAction]
Printable View [PrintableListView]
Custom Buttons
Available Buttons
Selected Buttons
Create Tasks
Send A Video
Add
Remove
Up
Down
List View Actions in Lightning Experience
Available Quick Actions
Selected Quick Actions
Customer Save
New Event
Save
Add
Remove
Up
Down
Save
Cancel

Setting Up Automated Sending

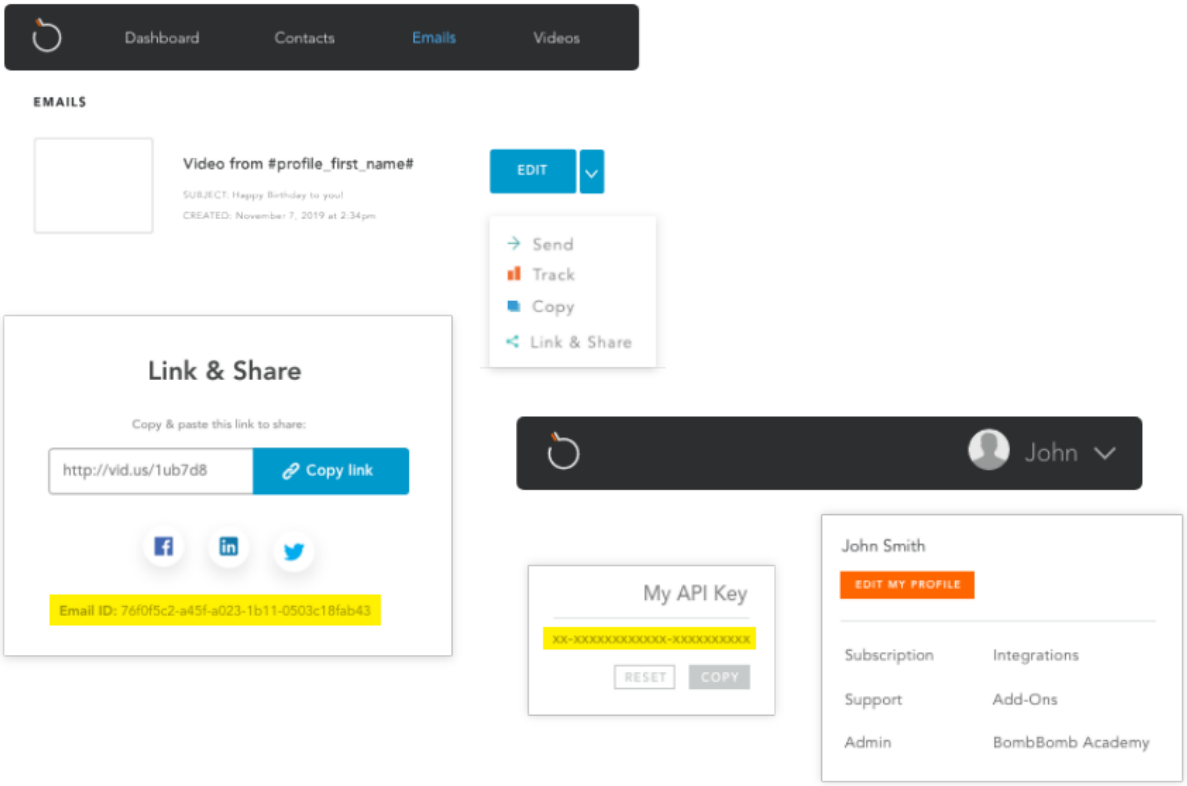
Automated sending allows you to prepare an existing BombBomb email message to be sent through BombBomb email servers when an event triggers within your organization. This is done by configuring the "Send a BombBomb email" Apex action. For your convenience, these instructions are reiterated in Salesforce under the tab titled "Automated Emails & BombBomb Email IDs."

1. Create a Process using the Process Builder with the Contact or Lead Object and any criteria you need.

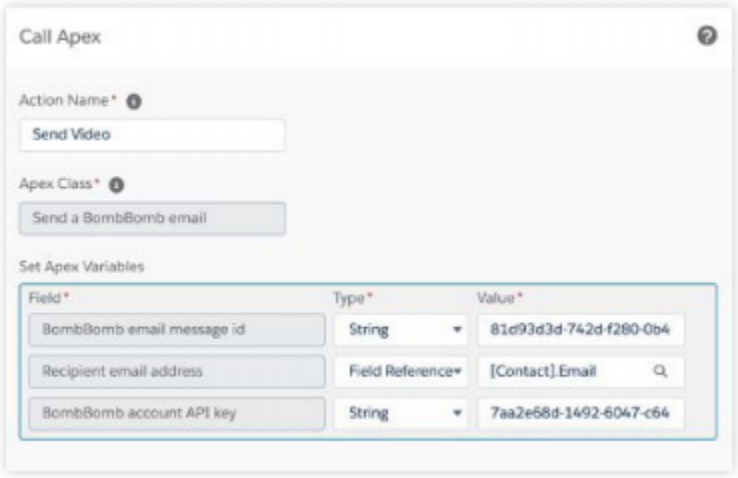


2. Under "Immediate Actions":
    a. Click "Add Action."
    b. Select "Apex" from the "Action Type" dropdown.
    c. Set a name for the action.
    d. Type "Send a BombBomb email" in the Apex class lookup.
3. In the "Set Apex Variables section":
    a. For Recipient Email Address, select or type "Field Reference."
    b. Set the value as the email field for the contact record.
    c. If you're using a standard field, it will be called "[Contact].Email" or "[Lead].Email."
4. For the BombBomb email message id, select "Type String."
5. To find the BombBomb email ID:
    a. Log into the BombBomb platform.
    b. Click the "Emails" tab.
    c. Click the dropdown arrow next to the "Edit" button on the email you want.
    d. Select the "Link & Share" option.
    e. Click the email ID at the bottom of the pop-up to copy the ID to your clipboard.

6. Paste the email id into the String field for BombBomb email message id.
7. For the BombBomb account API key, select type String.
8. To find your API key:
    a. Log into the BombBomb platform.
    b. Hover over your name on the top right corner and click "Integrations."
    c. Click the "Copy" button to copy the API key displayed in the upper right corner.
9. Paste your BombBomb API key in the API key field within the Process Builder.



10. Click the "Save" button.
    a. Add any other actions you need.
    b. Once you're finished, you can activate the process.
11. You can now begin using Automated Sending.


Call Apex
Action Name *
Send Video
Apex Class *
Send a BombBomb email
Set Apex Variables
Field *
Type *
Value *
BombBomb email message id
String
81d93d3d-742d-f280-0b4
Recipient email address
Field Reference
[Contact].Email
BombBomb account API key
String
7aa2e68d-1492-6047-c64

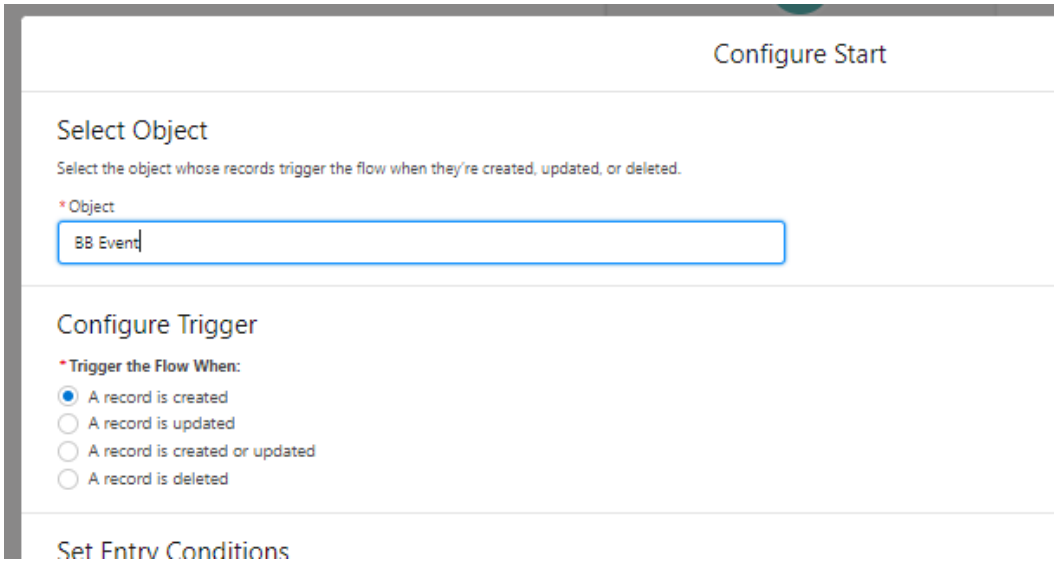
Using Contact Suppressed Events

When a contact unsubscribes from a BombBomb email, a BombBombEvent__c record is created with data you can optionally use to sync into your related Salesforce Contact or Lead record.

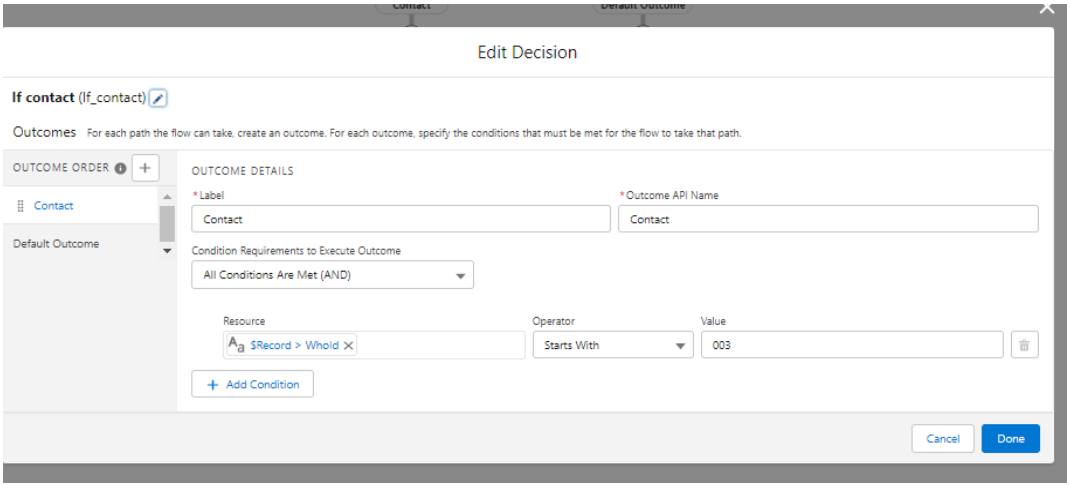
For example, you may wish to enable HasOptedOutOfEmail for a Lead or Contact when a contact unsubscribes from BombBomb. You can do this by creating a flow in the Flow Builder.

The Flow Builder is customizable and can be modified to meet your requirements, below are the instructions for a simple example flow that you can expand on if needed.

1. Create a "Record Triggered Flow"
2. Enter BB Event / BombBombEvent__c for the Configure Start Object, trigger when a record is created

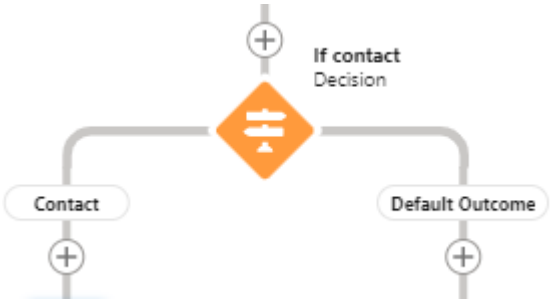


3. Add a Decision that determines whether the related record is a Lead or a Contact. You can do this

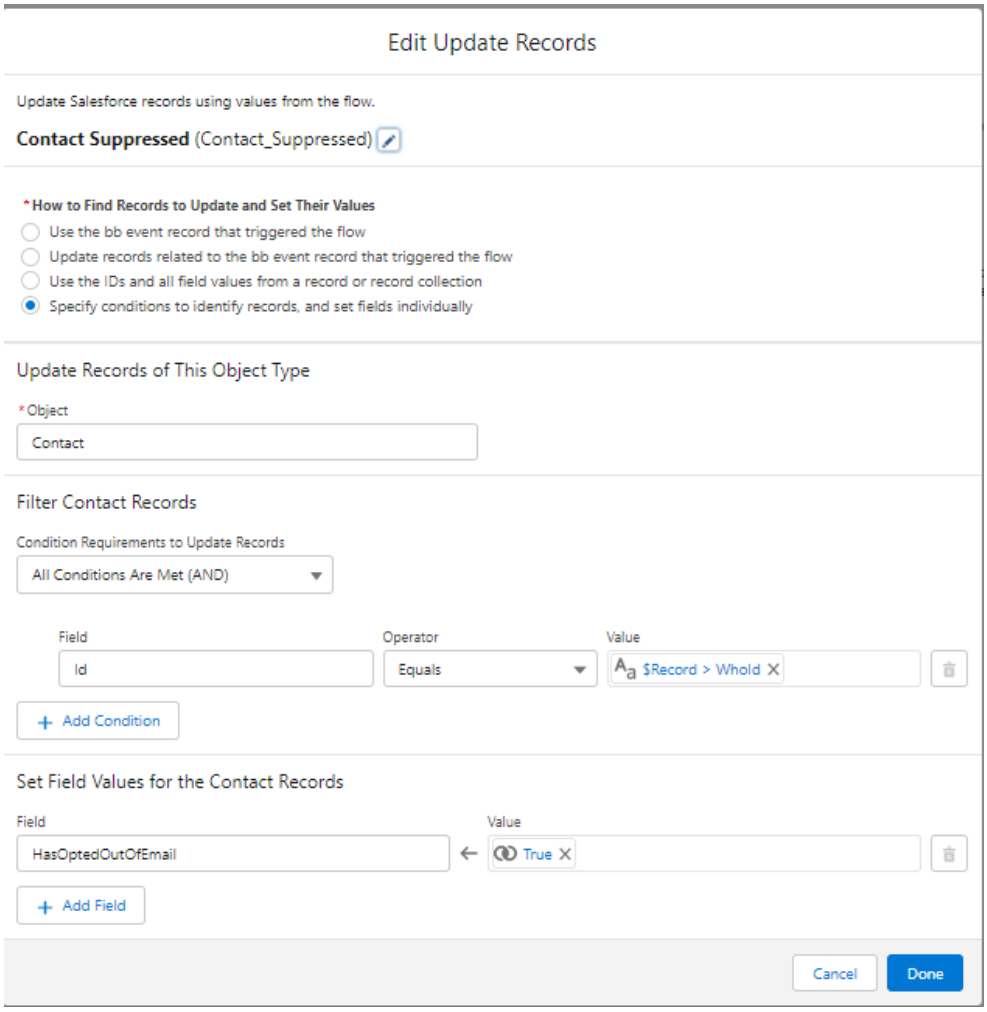
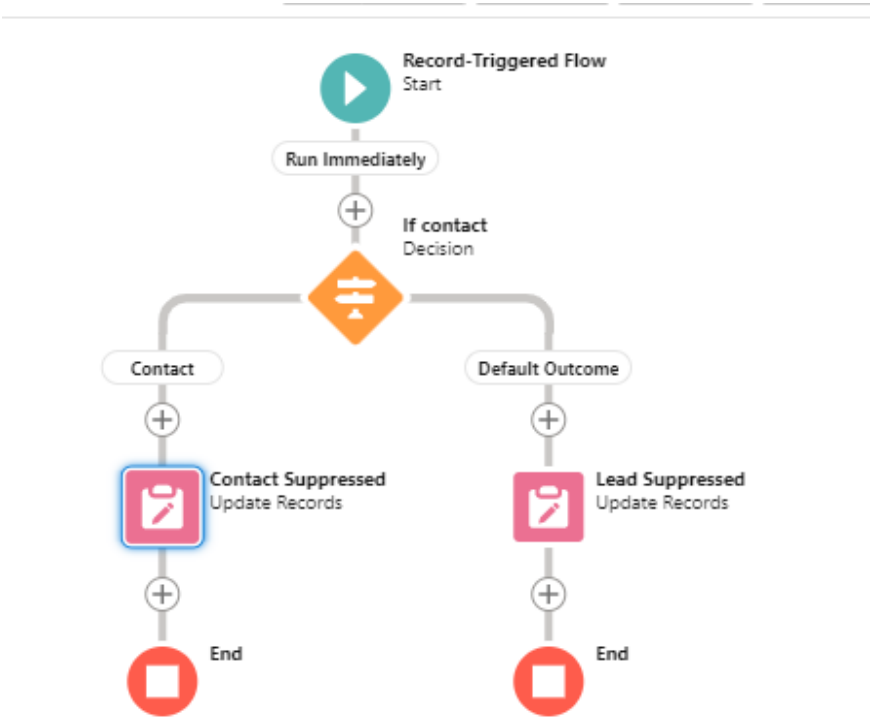


by checking if the WhoId__c field begins with 003 which indicates a Contact.

4. This will result in two outcomes:



5. For the Contact outcome, add an Update Record action that sets the HasOptedOutOfEmail value for the contact record with Id matching WhoId__c from the BombBombEvent__c



6. Do the same thing for the Default outcome, this time using the Lead object instead of Contact.
7. The final flow should look like this: