

salesforce

Syncing Between Pardot and Salesforce

Salesforce, Winter '19



 @salesforcedocs

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SYNCING BETWEEN PARDOT AND SALESFORCE

Getting Started with the Salesforce Connector

Sync newly created prospects, contacts, and leads, between Pardot and Salesforce activities.

The Salesforce connector, an AppExchange-certified solution, helps you streamline disparate marketing channels from within Pardot.

Records sync between in Pardot and Salesforce at least every 10 minutes. The sync process handles as many as 800 records every 10 minutes, and up to 4,800 every hour.

EDITIONS

Available in: Salesforce Classic

Available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

Setting Up the Salesforce Connector

Set up your Salesforce connector for either production or sandbox environments.

Choose the option that best describes your situation.

If you're setting up the connector for	You'll set up the connector using the instructions in
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Either a production or a sandbox environment for the first time

[Set Up the Connector to Sync with Either Production or Sandbox Environments](#)

A sandbox environment in addition to an already existing connector you've already set up for your production environment

[Set Up the Connector to Sync with Sandbox Environments](#)

EDITIONS

Available in: Salesforce Classic

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Prepare Salesforce for Connecting to Pardot

Install an AppExchange package to get Salesforce ready to connect and sync with Pardot.

The package you'll download from the AppExchange automatically updates Salesforce with a custom application, custom tab, and custom fields for leads and contacts. After you install the package, you'll see a custom tab for the Pardot LeadDeck application. Keep in mind that you may need to customize your view to display the custom fields for leads and contacts. This helps your sales teams share information between Pardot and Salesforce.

EDITIONS

Available in: Salesforce Classic

Available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

If you're installing the Pardot AppExchange package for a

You need to

Production environment

1. Go to the [Pardot AppExchange package](#) for production environments.
2. Click **Continue** to install the package.
3. When prompted for your username and password, enter your production username and password.
4. Review the actions and click **Deploy** to complete the installation.
5. Confirm with your Salesforce administrator you have read permissions for ObjectChangeLogs.

Sandbox environment

1. Log out of Salesforce.
2. Go to the [Pardot AppExchange package](#) for sandbox environments.
3. When prompted for your username and password, enter your sandbox username and password.
4. Click **Continue** to install the package.
5. Review the actions and click **Deploy** to complete the installation.
6. Confirm with your Salesforce administrator you have read permissions for ObjectChangeLogs.

Set Up the Connector to Sync with Either Production or Sandbox Environments

Get your Salesforce connector ready to sync between Pardot and Salesforce for either a product or a sandbox environment.

Complete this procedure only if this is the first time you're establishing your connector. You'll need administrative rights in Salesforce for this procedure.

1. From Salesforce Setup, enter *Network Access* in the *Quick Find* box, then select **Network Access**.
2. Create these trusted IP ranges.

Start IP Address	End IP Address
67.228.95.145	67.228.95.145
67.228.168.139	67.228.168.141
67.228.223.106	67.228.223.107

EDITIONS

Available in: Salesforce Classic

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Add the Connector to Pardot

Add and manage connector settings directly in Pardot.

Complete this procedure only if this is the first time you're establishing your connector and you have administrative rights in Salesforce.

1. In Pardot, hover over **Admin**, then click **Connectors**.
2. Click **+ Add Connector**.
3. Select Salesforce.
4. Type a name for the connector.
Use a name that makes it easy for you to identify your connector.
Example: Salesforce Connector)
5. Type your Salesforce username and password.
Keem in mind that when your Salesforce password changes, you'll need to update the Salesforce password for your connector.

Options for Customizing the Connector

Customize the connector based on your preferences.

Select any of these options to customize your connector.

The option	Which
Automatically create prospects in Pardot if they're created in Salesforce	Enables a trigger to set any newly created leads or contacts in Salesforce to sync to Pardot. This won't happen for historical leads or contacts—only for those created after installing the Pardot AppExchange package in Salesforce, and will work only for leads and contacts created with an email address. If this feature is enabled later on, any leads and contacts with email addresses that were created after the Pardot package was installed in Salesforce will be pushed down to Pardot. Select a default campaign from the dropdown for any prospect created with this option.
Automatically change emails in Pardot to reflect changes in Salesforce	Automatically updates email addresses for Pardot prospects if an email address of a lead or contact is updated in Salesforce. Learn more about keeping email address updates in sync in About Email Address Updates Between Salesforce and Pardot .
Automatically match Salesforce users to Pardot users	Lets you send emails from any user fields, including, for example, support contacts and account managers. Learn how to set up this functionality in Send Emails from Salesforce .
Exclude Salesforce Partner and Customer Portal users from Prospect assignment	Prevents Salesforce Partner and Customer Portal users from displaying in the "CRM Username" dropdown when you edit a user in Pardot.

EDITIONS

Available in: Salesforce Classic

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

USER PERMISSIONS


To create records:

- Create, Update, and Read on contacts and leads

EDITIONS

Available in: Salesforce Classic


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The option	Which
Allow editing of Prospect lists within the CRM	Lets users add and remove Pardot prospects from within Salesforce. If you check this box, you must add the Visualforce elements to your Leads and Contacts page layouts.
Connect to a Salesforce sandbox account	Let's you connect to a sandbox environment.
Sync emails with the CRM	Automatically logs an activity for every email sent to a prospect (list, drip, autoresponder and 1-to-1 prospect emails).  Note: This can quickly fill up your activity views, especially on an account object. Disabling Email Logging in Pardot is not retroactive. If the email logging may interfere with your workflow in Salesforce, we recommended that you do not enable this option.
Sync plugin emails with the CRM	Logs an activity for emails you send through Pardot for Microsoft® Outlook®, our Thunderbird extension, our Apple Mail plug-in, or our add-in for Gmail.
Enable Salesforce emails for task creation	Lets you send a notification email to users when a task is created.
Enable Salesforce emails for assignment rules	Lets Salesforce send a notification email to users when assignment rules run.
Enable Salesforce emails for user and queue assignments	Lets Salesforce send a notification email to users when an assignment takes place for a user or queue.

Set Up the Connector to Sync with Sandbox Environments

Get your Salesforce connector ready to sync between Pardot and your Salesforce sandbox.

Complete this procedure only if you already have a Salesforce connector set up for your production environment, but want the connector to point to your sandbox environment instead.

1. In Pardot, hover over **Admin**, then click **Connectors**.
2. In the row for your Salesforce connector, click  , then **Edit**.
3. In the `username` field, append `.NSPARDOT` to your username.
(Example: christina.wills@pardot.com.NSPARDOT)
4. If your sandbox password differs from your password in production, enter your sandbox one in the `password` field.
5. Select the option `Connect to a Salesforce sandbox account`.

Because your sandbox is a copy of your production Salesforce organization, you'll see the connector for your sandbox, too.

EDITIONS

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Whitelist Pardot IP Addresses in Salesforce

Set up Pardot IP addresses in Salesforce so that Pardot can communicate with Salesforce.

Complete this procedure only if it is the first time you're establishing your connector, and your organization restricts IP access at the User Profile level. You need administrative rights in Salesforce for this procedure.

1. From Salesforce Setup, enter *Network Access* in the *Quick Find* box, then select **Network Access**.
2. Create these trusted IP ranges.

Start IP Address	End IP Address
136.147.104.20	136.147.104.23
136.147.96.20	136.147.96.23

EDITIONS

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Turn On the Connector

Complete a simple task to turn on the Salesforce connector so that you can begin syncing between Pardot and Salesforce.

1. In Pardot, hover over **Admin**, then click **Connectors**.
2. In the row for your Salesforce connector, click **verify now**.

If Pardot is able to send data to and receive data from Salesforce, the status will change to .

EDITIONS

Available in: Salesforce Classic

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Map Custom Leads Fields to Contacts Fields

Get the most out of contacts created from converted leads when you map custom fields between the two record types.

The connector creates leads in Salesforce from prospects in Pardot. But when you convert those Salesforce leads to contacts, only standard fields from the contacts appear for the newly converted contacts. Mapping custom fields between leads and contacts ensures you see all the information that helps you with your marketing and sales efforts.

1. From the object management settings for leads, go to the fields area, and then click **Map Lead Fields**.
2. For each custom lead field, choose a custom account, contact, or opportunity field into which you want the information inserted when you convert a lead.
3. Click **Save**.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

Setting Up Pardot Custom Fields in Salesforce

Get your custom Pardot fields to appear in Salesforce.

The AppExchange package you installed to get Salesforce ready to connect and sync with Pardot sets up the custom fields for you, but the fields do not appear in Salesforce automatically. You need to complete a procedure to have these custom fields appear in Salesforce.

EDITIONS

Available in: Salesforce Classic

Available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

Add Sections to Leads and Contacts Page Layouts

Complete a procedure for getting Pardot fields to appear in leads and contacts page layouts.

1. In Salesforce, from the object management settings for leads, go to Page Layouts. A drag-and-drop box including your field options appears at the top of the page.
2. Drag a Section field to your Leads page layout.
3. In the pop-up window, enter section name *Pardot*.
4. For the number of columns, select **2 (Double)**.
5. Select the option for showing the section heading, and then click **OK**.
6. Return to the Fields section of the drag-and-drop editor and scroll right to locate the Pardot custom fields.
7. Drag all the Pardot fields into your new section.
8. Add another section using the drag-and-drop editor, but for the number of columns, select **1 (Single)**.
9. Select the option for showing the section heading, and then click **OK**.
10. Select **Visualforce Pages tab** and drag **Pardot Lead Activities** and **Pardot Lead List Membership** into your new section.

EDITIONS

Available in: Salesforce Classic

Available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

Set Up Salesforce to Add Campaign Prospects to Pardot

Set up Salesforce to quickly get prospects from your Salesforce campaigns into Pardot.

1. From the object management settings for campaigns in Salesforce Setup, go to Page Layouts.
2. Edit the layout, and select **Buttons**.
3. Drag the **Add to Pardot List** button to your row of custom buttons at the top of the Campaign view.
4. Save the layout.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

Set Up Salesforce for Adding Leads and Campaigns to Pardot

Easily add buttons in Salesforce that make it easy to add leads and campaigns to Pardot, as well as send Pardot-tracked email from Salesforce.

If you want to add Salesforce leads and campaigns to Pardot, set up and use the **Send to Pardot** button. If email address associated with the Salesforce records:

- Don't yet exist in Pardot, the Send to Pardot feature creates new records for you in Pardot.
- Already exist in Pardot, no harm done—you won't get duplicate records in Pardot.

If you want to send Pardot-tracked email from Salesforce set up and use the **Send Pardot Email** button. You can send free-form tracked email, or use a marketing approved Pardot email template to send email to a lead or contact.

1. Log in to Salesforce as an administrator.
2. From the object management settings for leads, go to Page Layouts.
A drag-and-drop box including your field options appears at the top of the page.
3. In the Lead Layout box, select **Buttons**.
4. Select the **Send to Pardot** button and drag it into the Lead Detail section.
5. Select the **Send Pardot Email** button and drag it into the Lead Detail section.
6. Save the layout.
7. Repeat Steps 2 through 6 for Contacts.


EDITIONS

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Assign Your Salesforce Username to the Connector

Make sure that any actions you take with the connector are associated with you.

1. In Pardot, hover over **Admin**, then click **User Management > Users**.
2. In the row for your user profile, click , then **Edit**.
3. Scroll to the bottom of the Edit User box.
4. Select your Salesforce username from the drop-down menu.
5. Click **Save user**.
6. When you're in your Pardot user profile, you'll see your Salesforce username in the **CRM Username** field. Click **Verify**, and enter your Salesforce password.

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Set Up Single Sign-On for Salesforce and Pardot

Avoid having to sign on to your two separate Salesforce and Pardot systems.

1. Log in to Pardot.
2. Hover over your email address, and then click **My Settings**.
3. Verify that your Salesforce username is correct. If it's correct, click **Verify**. If you need to change or add it, click **Edit My User Information** to change or add it.
4. When prompted, enter your Salesforce password, and then click **Verify**.
You'll receive a message letting you know whether the validation was successful.

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- If the validation was successful, log in to Salesforce and select the Pardot tab.
You should be able to see the contents of the tab without having to log in to Pardot separately.

Send Emails from Salesforce

Send emails from any user field, including support contacts, account managers, or anyone who is attached to a Pardot prospect.

Setting up your users and the necessary custom fields in Pardot lets you take advantage of this feature, and send emails to prospects that could appear to come from any user in Salesforce.

In	Do this
Salesforce	<ol style="list-style-type: none"> Create the field you'd like to use to contain your CRM User Value, e.g. Relationship Manager, on the lead or contact record in Salesforce. This field should be the type "Lookup Field." If you already have the field created, make sure that it's a "Lookup Field" and that it's successfully populated. Populate the lookup field with the user.
Pardot	<ol style="list-style-type: none"> Create matching user seats for any Salesforce users. On the user record, map the Pardot user seat to the Salesforce user. This lets Pardot to infer information about the user for variable tags when sending the email. Create a custom field in Pardot with the designated type "CRM User" to hold the field values on the prospect record. This field is a read-only field in Pardot. Map the custom field to the corresponding salesforce.com field.

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About Email Address Updates Between Salesforce and Pardot

Learn how email address updates for your Salesforce contacts and leads automatically sync to your corresponding prospects in Pardot.

When you update email addresses either manually or with Data.com for your Salesforce contacts and leads, the following sync cycle updates the email addresses for corresponding Pardot prospects. Also, if you merge Salesforce contacts or leads and the email addresses for your primary records differ from the corresponding Pardot prospects, the following sync cycle updates email addresses for your prospects.

What Syncs when Email Addresses are Missing in Salesforce or Pardot

If you have Salesforce contacts or leads that don't include email addresses, but then subsequently add them, the sync cycle will not create new prospects in Pardot. If, however, prospects with matching email addresses already exists in Pardot, the sync cycle will update email addresses for the matching Salesforce leads or contacts.

EDITIONS

Available in: **Salesforce Classic**

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer Editions**

Understand Sync Options for Pardot Accounts and Salesforce Person Accounts

Easily sync leads between the two systems after you assign your Pardot prospects to users.

Consider these options before you sync Pardot accounts and Salesforce person accounts.

If you want Pardot to **You should know that**

Create leads in Salesforce and sync with person accounts

By default, the connector creates Salesforce records as leads. But when leads are converted to person accounts, Pardot is unable to recognize person accounts. Pardot can't sync with person accounts. Instead, Pardot recreates leads to sync with.

If you use person accounts in Salesforce, you'll want to change this default behavior. By enabling person account syncing with lead creation, Pardot still creates records in Salesforce as leads, but when the leads are converted into person accounts, Pardot syncs with the person account and no additional Salesforce leads will be created for that prospect.

With this syncing, a Salesforce person account will sync to a Pardot prospect record that is associated with an Account in Pardot, which will not merge the two records into one view as in Salesforce. The field mapping will remain the same—contact fields will map to prospect fields and salesforce.com account level fields will map to Pardot account fields. This means that the Account Owner of a person account will sync to the Assigned User field on the account level in Pardot.

Create and sync person accounts only

Assigned prospects that have updated default field values (including the assigned owner) in Salesforce sync roughly every ten minutes, pushing the updates back to the Pardot record (because Salesforce wins in the event of a conflict in data). Updates to custom fields also sync with Salesforce, pushing those back to the Pardot record unless the option to have the Pardot value override the Salesforce value is enabled for that custom field.

Unassigned prospects in Pardot that have activities or updated records also sync if records in Salesforce use the same email address. Keep in mind that assigned prospects take higher priority for syncing than those that are unassigned in Pardot. If there are no matching email addresses in Salesforce, the prospect in Pardot will not sync until it's assigned to a user. This means that the connector will not create new records in Salesforce until the prospect is assigned in Pardot.

EDITIONS

Available in: Salesforce Classic

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Sync Leads between Pardot and Salesforce

Easily sync leads between the two systems after you assign your Pardot prospects to users.

If you already have leads in Salesforce, the connector will sync those leads to Pardot, merging the Pardot prospects and Salesforce leads between the two systems. If data in common fields between Salesforce and Pardot conflicts, including lead owner, the data from the Salesforce fields always wins. You can take advantage of this functionality when you set up custom fields in Pardot. You can also set up Pardot to send emails to prospects that appear to come from any user in Salesforce.

Sync Method	Do this
Manual	In Pardot, when you click the link Synchronize with CRM , prospects in Pardot and leads in Salesforce sync instantly, merging the data from Pardot with that from Salesforce.
Automatic	Assigned prospects that have updated default field values (including the assigned owner) in Salesforce sync roughly every ten minutes, pushing the updates back to the Pardot record (because Salesforce wins in the event of a conflict in data). Updates to custom fields also sync with Salesforce, pushing those back to the Pardot record unless the option to have the Pardot value override the Salesforce value is enabled for that custom field. Unassigned prospects in Pardot that have activities or updated records also sync if records in Salesforce use the same email address. Keep in mind that assigned prospects take higher priority for syncing than those that are unassigned in Pardot. If there are no matching email addresses in Salesforce, the prospect in Pardot will not sync until it's assigned to a user. This means that the connector will not create new records in Salesforce until the prospect is assigned in Pardot.

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Tracking Prospects as Salesforce Contacts

Automatically create contacts in Salesforce from your Pardot prospects.

By default, the Salesforce connector creates Salesforce leads from your prospects in Pardot. If you don't want to track your prospects as leads in Salesforce, you can have a Pardot Services member adjust the default setting so that Pardot creates contacts in Salesforce instead of leads.

If this feature is enabled on your account, Pardot will look first at your Salesforce leads to see whether there's an existing lead record with the same email address with which Pardot can sync. If there's no existing lead record, Pardot looks for an existing contact record with the same email address. If no Salesforce lead or contact exists with the same email address, Pardot will create a new Salesforce contact record.

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