



---

# Pardot User Migration Admin Guide

Salesforce, Winter '21





# CONTENTS

|   |    |
|---|----|
| <b>INTRODUCTION</b> .....                                   | 1  |
| Overview .....  | 1  |
| <b>USER MIGRATION PLANNING WORKSHEET</b> .....              | 2  |
| <b>UPGRADE YOUR SALESFORCE-PARDOT CONNECTOR</b> .....       | 3  |
| Upgrade to v2 of the Salesforce-Pardot Connector .....      | 3  |
| <b>AUDIT YOUR CURRENT USER STRUCTURE</b> .....              | 4  |
| <b>PREPARE USER RECORDS IN PARDOT AND SALESFORCE</b> .....  | 5  |
| Add a Single User .....                                     | 5  |
| Add Multiple Users .....                                    | 6  |
| <b>MAP USERS AND ENABLE SALESFORCE SINGLE SIGN-ON</b> ..... | 7  |
| Setup for Accounts with User Sync Enabled .....             | 7  |
| Map Salesforce and Pardot Usernames .....                   | 7  |
| Setup for Accounts Without User Sync Enabled .....          | 8  |
| Import Users .....  | 8  |
| <b>UPDATE API INTEGRATIONS</b> .....                        | 10 |
| <b>UPDATE THE WORDPRESS PLUGIN</b> .....                    | 11 |
| Install the Pardot WordPress Plug-In .....                  | 11 |
| <b>NEXT STEPS</b> .....                                     | 12 |



# INTRODUCTION

Beginning with the Spring '21 release, Pardot's user authentication system is being retired and all users are required to use Salesforce single sign-on (SSO). This guide helps you prepare for this change so that you don't experience any user access issues for Pardot.

Before you begin, make sure that you review these resources:

- [Pardot User Migration Overview](#)
- [Pardot User Migration FAQ](#)

## Overview

---

Preparing for a smooth transition to using Salesforce single sign-on (SSO) for all users involves a few major tasks. Take the time to understand all the tasks involved so that you can plan for the time and resources required to prepare. Depending on how your org is structured, it's possible you have some or even all of these tasks completed already.

Here's a high-level overview of everything you need to have in place to be ready for this change:

- Audit your current user structure for Pardot and Salesforce
- Ensure you have an updated Salesforce-Pardot connector
- Map Pardot-only users to Salesforce users
- Enable Salesforce SSO for all users
- Update API integrations (if applicable)
- Update your WordPress plugin (if applicable)

# USER MIGRATION PLANNING WORKSHEET

To help you be ready for the Spring '21 release, we broke everything down into tasks. Depending on the size and structure of your org, it's possible you need more than one admin to assist with this process. You can print or save this worksheet to help you plan and track progress on each task.

| <b>Task</b>   | <b>Owner</b> | <b>Completion Status</b> | <b>Notes</b> |
|---|--------------|--------------------------|--------------|
| Upgrade to v2 of the Salesforce-Pardot connector (recommended)                      |              |                          |              |
| Audit current user setup and ensure that users have correct access                  |              |                          |              |
| Create new Salesforce users (if needed)   |              |                          |              |
| Map all Pardot users to a Salesforce user and verify that user mappings are correct |              |                          |              |
| Enable Salesforce SSO for all users   |              |                          |              |
| Enable Salesforce User Sync (recommended)   |              |                          |              |
| Update API integrations to use Salesforce SSO (if applicable)                       |              |                          |              |
| Update WordPress plugin (if applicable)   |              |                          |              |
| Communicate changes to Pardot users   |              |                          |              |

# UPGRADE YOUR SALESFORCE-PARDOT CONNECTOR

Make sure you upgraded to v2 of the Salesforce-Pardot connector and confirm that the connector is verified. If you haven't connected Pardot and Salesforce, set up the connector now.


SEE ALSO:


[Setting Up a Salesforce-Pardot Connection for Accounts Purchased After February 11, 2019](#)

[Setting Up the Salesforce-Pardot Connector for Accounts Purchased Before February 11, 2019](#)

## Upgrade to v2 of the Salesforce-Pardot Connector

To take advantage of improvements like on-demand metadata sync, Business Unit Switcher, and the Pardot integration user, upgrade to v2 of the Salesforce-Pardot connector. This step is not required for user migration, but we strongly recommend you consider upgrading to get the most out of Pardot.

 **Note:** Upgrading the connector makes permanent changes to your account. Carefully read the considerations before starting the upgrade process.

1. Open the Connectors page.
  - In Pardot, select **Admin** and then **Connectors**.
  - In the Lightning app, select **Pardot Settings**, and then **Connectors**.
2. Click the  icon next to the Salesforce connector, and then select **Upgrade**.
3. Select the checkbox to acknowledge the change to your account and certify that you've reviewed the considerations for upgrading.
4. Click **Next**.
5. Select a connector user, then click **Choose User**.
6. Review your selections, then click **Upgrade Now**. If you select the integration user in Step 3, you must log into Salesforce to complete the upgrade.

A confirmation email is sent when the upgrade is complete.

SEE ALSO:

[Considerations for Upgrading to v2 of the Salesforce-Pardot Connector](#)

### EDITIONS

Available in: All Pardot Editions

### USER PERMISSIONS

To upgrade the Salesforce-Pardot connector

- Pardot Administrator role

# AUDIT YOUR CURRENT USER STRUCTURE

Before you make any changes, inventory your Pardot users and their current authentication status. Make sure each user has the correct access and permissions for their role.

Filter your users in Pardot to see a list of Pardot-only users. If needed, you can also create a .csv export to work from.

1. Open the Users page. Select **Admin (Pardot Settings)** in the Lightning app), and then **User Management > Users**.
2. Click the View dropdown menu and select **Pardot-only Users**. These are the users you need to map to a user in Salesforce.
3. To create an export to work from, click **Tools**, and then select **CSV Export**. You receive an email when each export is complete. Exports are available for download on the Exports page in your Pardot account settings.

If you have Pardot-only users that you know are inactive or not needed, you can delete them. To delete a user, click  and select **Delete**.

## EDITIONS

Available in: All Pardot Editions

## USER PERMISSIONS

To manage Pardot users


- Pardot Administrator role



# PREPARE USER RECORDS IN PARDOT AND SALESFORCE

Identify or create a Salesforce user to associate to each of your Pardot-only users.

To ensure your users have access the latest Pardot functionality, we recommend a full CRM license for all Salesforce users. However, we understand this may not be possible for everyone, so all Pardot editions are now bundled with 100 Salesforce Identity licenses. These licenses are available to you immediately and can be used to create new Salesforce users.

 **Note:** Make sure you're familiar with the guidelines for adding users in Salesforce.

## [Add a Single User](#)

Depending on how many Pardot-only users you have, you may choose to add new Salesforce users one at a time.

## [Add Multiple Users](#)


You can quickly add up to 10 users at a time to your organization. Your Salesforce edition determines the maximum number of users that you can add.

SEE ALSO:

[Guidelines for Adding Users](#)

## Add a Single User

Depending on how many Pardot-only users you have, you may choose to add new Salesforce users one at a time.

 **Note:** Email and username are required fields. An email can be reused across orgs but the username must be unique. The username must be formatted as an email address but it doesn't need to be a real or active email.

1. From Setup, enter `users` in the Quick Find box, then select **Users**.
2. Click **New User** and fill out the required fields. For User License, you can use one of the 100 Salesforce Identity licenses bundled with your Pardot account.
3. When you're done, click **Save** or **Save & New** to create another Salesforce user.

### EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Contact Manager, Essentials, Group, Professional, Enterprise, Performance, Unlimited, Developer,** and **Database.com** Editions

### USER PERMISSIONS

To create users:

- Manage Internal Users

## Add Multiple Users

---

You can quickly add up to 10 users at a time to your organization. Your Salesforce edition determines the maximum number of users that you can add.

1. From Setup, enter *Users* in the *Quick Find* box, then select **Users**.
2. Click **Add Multiple Users**.
3. If multiple user license types are available in your organization, select the user license to associate with the users you plan to create. The user license determines the available profiles.
4. Specify the information for each user.
5. To email a login name and temporary password to each new user, select **Generate passwords and notify user via email**.
6. Click **Save**.
7. To specify more details for the users that you've created with this method, edit individual users as needed.

### EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

### USER PERMISSIONS

To create users:

- [Manage Internal Users](#)

# MAP USERS AND ENABLE SALESFORCE SINGLE SIGN-ON

Map Pardot-only users to the correct users in Salesforce, and then enable Salesforce single sign-on (SSO). The process for completing these steps depends on whether you have Salesforce User Sync enabled in Pardot.

## EDITIONS

Available in: All Pardot Editions

### [Setup for Accounts with User Sync Enabled](#)

If you have Salesforce User Sync enabled in Pardot, map your Pardot-only users to the correct Salesforce user. After you map your users, Salesforce User Sync will automatically convert them to single sign-on (SSO).

### [Setup for Accounts Without User Sync Enabled](#)

If Salesforce User Sync isn't enabled in your Pardot account, you can create a .csv file of your Salesforce users and import it to Pardot. As part of the import process, map your Salesforce users to the correct Pardot users and enable Salesforce single sign-on (SSO).

## Setup for Accounts with User Sync Enabled

---

If you have Salesforce User Sync enabled in Pardot, map your Pardot-only users to the correct Salesforce user. After you map your users, Salesforce User Sync will automatically convert them to single sign-on (SSO).

 **Note:** After users are converted to SSO, they can no longer sign in with their Pardot credentials. Notify your Pardot-only users about this change before you begin mapping users.

### [Map Salesforce and Pardot Usernames](#)

Before you can enable Salesforce single sign-on (SSO), you must map all your Pardot users to their associated Salesforce user record.

SEE ALSO:

[Considerations for Managing Users with Salesforce](#)

## Map Salesforce and Pardot Usernames

Before you can enable Salesforce single sign-on (SSO), you must map all your Pardot users to their associated Salesforce user record.

 **Note:** Before you begin, make sure you have created the Pardot and Salesforce users you want to map.

1. Open the Pardot user record for editing.
2. From the CRM Username dropdown, select the Salesforce user.
3. Save the user.
4. Click the **verify now** link in the CRM Username line of the user record.

Repeat these steps for each user you want to map.

## Setup for Accounts Without User Sync Enabled

If Salesforce User Sync isn't enabled in your Pardot account, you can create a .csv file of your Salesforce users and import it to Pardot. As part of the import process, map your Salesforce users to the correct Pardot users and enable Salesforce single sign-on (SSO).

### Requirements for User Migration

Before you use the import tool to map users and enable Salesforce SSO, keep these requirements in mind:

- Prepare your .csv file for import before you begin. Include a CRM Username header and list the usernames for your Salesforce users so you can map them to your users in Pardot.
- You must enable Salesforce SSO for the users in your import (Step 7).

#### Import Users

You can create or update up to 50 users at once by importing a .csv file.

### Import Users

You can create or update up to 50 users at once by importing a .csv file.

 **Note:** User import is not available in accounts with Salesforce User Sync enabled.

Before you begin, make sure that your import file meets these criteria.

- UTF-8 encoded to preserve special characters
- Contains a header row with First Name, Last Name, and Email Address headers, at minimum
- Smaller than 100 MB

These headers are accepted in import files.

- Email Address (required)
- First Name (required)
- Last Name (required)
- CRM Username (required)
- Job Title
- Password Expires (Yes or No)
- Phone Number
- Role
- Tags
- URL

1. Open the Users page. Select **Admin (Pardot Settings)** in the Lightning app), and then **User Management > Users**.
2. Click **Import Users**.
3. Click **Choose File**, and select the import file.
4. Click **Next**.
5. Map the fields.
6. Select a time zone. This setting applies to all users that you are importing.

#### EDITIONS

Available in: All Pardot Editions

#### USER PERMISSIONS

To import users:

- Pardot Administrator role

7. If you have a Salesforce connector, enable single sign-on (SSO) for users. Users are SSO-only and cannot log in to Pardot using their email and password.
8. When finished configuring the import, click **Next**.
9. Review your import, then click **Confirm & Save**.

When your import is finished, Pardot sends an email confirmation.

# UPDATE API INTEGRATIONS

If you use API integrations, update them to authenticate to Salesforce SSO instead of Pardot's authentication system.

If you haven't already, document your API integrations so you know the scope of the work required to update them. Work with your developer(s) to create a plan to update them to authenticate via Salesforce single sign-on (SSO) prior to the Spring '21 release.

Pardot is reaching out directly to these third-party API integration partners:

- Drift
- FeedOtter
- On24
- TaxiForEmail
- Tray.io
- Qualified
- Zapier
- Zoom

If you use a third-party service that is not on this list, contact them about updating their Pardot API integration.

SEE ALSO:

[Developer Docs: Pardot API Documentation](#)

# UPDATE THE WORDPRESS PLUGIN

To help prepare for this change, Pardot's WordPress plugin has been updated to authenticate via Salesforce SSO. If you use the WordPress plugin, you must update it to the new version

## EDITIONS

Available in: All Pardot Editions

## Install the Pardot WordPress Plug-In

Your WordPress.org admin must install the Pardot plug-in. The wordpress plug-in is only available for Pardot editions with API access.

To use Salesforce SSO authentication, you must create a connected application for the plugin in Salesforce. See [Configure Basic Connected App Settings](#)

1. Download the [Pardot WordPress plug-in](#).
2. Add the plug-in to your site in one of two ways.
  - In the WordPress admin area, click **Plugins** and **Add New**. Search for Pardot.
  - Upload pardot-for-wordpress to your `/wp-content/plugins` directory.
3. Activate the plug-in.
4. Navigate to Settings and click **Pardot Settings**.
5. Select **Salesforce SSO** for the authentication type.  
Pardot Authentication is being retired in February 2021.
6. Enter a Consumer Key, Consumer Secret, and Business Unit ID.  
Find the Consumer Key and Secret in the connected application of Salesforce setup. The Business Unit ID can be found in Pardot Account Setup.
7. Click **Authenticate with Salesforce** and enter your Salesforce username and password.
8. Select a campaign. The campaign's Pardot tracking code is added to your WordPress site.
9. Save your settings.

# NEXT STEPS

When you're done with all the tasks outlined in this guide, there are a few follow-up items to consider.

## Communicate Changes to Your Pardot Users

---

If you haven't already, notify all your Pardot users about this change. Ask everyone to confirm that they can log in with their Salesforce single sign-on (SSO) credentials and advise them to stop logging in with their Pardot-only credentials immediately.

## Make Plans for Training Environments

---

Pardot training environments use Pardot-only authentication. If you have an active training environment that you want to use after the Spring '21 release, complete the steps outlined in this guide so you can log in with Salesforce SSO.

If you're a Pardot Advanced or Premium customer, use Developer Sandboxes for Pardot for your testing needs.

## Enable Salesforce User Sync

---

Salesforce User Sync lets you create and manage your Pardot users in Salesforce. If you purchased Pardot before the Summer '20 release and don't have Salesforce User Sync enabled, consider enabling it now. After you map your Pardot and Salesforce users to prepare for Pardot User Migration, the process to enable Salesforce User Sync is simple.

If you purchased Pardot after the Summer '20 release, User Sync is enabled by default.

SEE ALSO:

[Enable Salesforce User Sync](#)

[Create a Sandbox for Pardot](#)