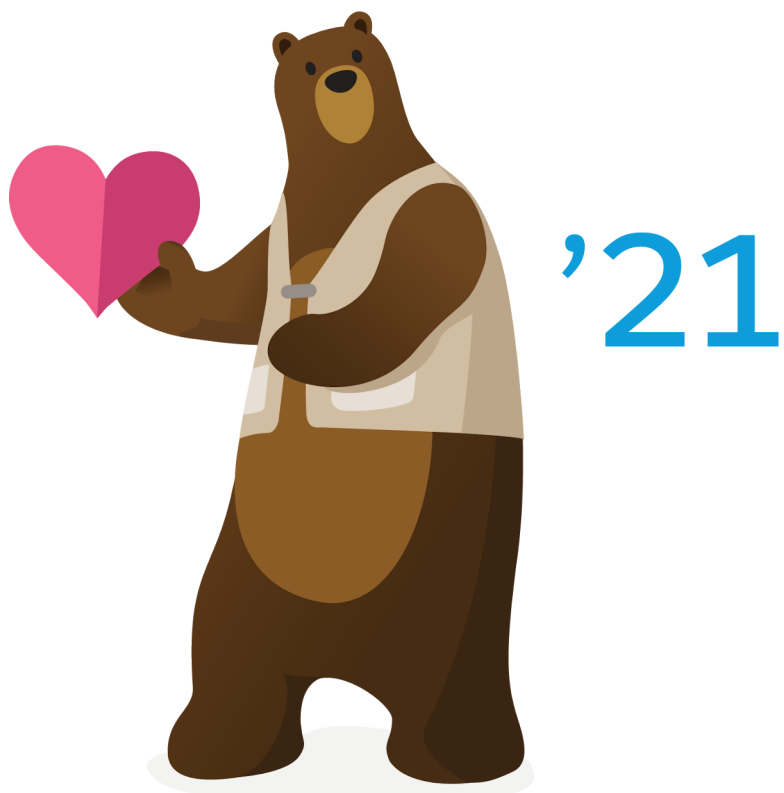

Engagement History Implementation Guide

Salesforce, Spring '21



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SHOW ENGAGEMENT HISTORY ON RECORDS

Together, Pardot and Salesforce track valuable engagement data that can tell you how well your marketing assets resonate with your customer base. Turn on Engagement History and choose where to surface this valuable data throughout Salesforce in the form of fields, related lists, and Lightning components.

Find out more about each feature: [Comparison of Engagement History Features](#) on page 3.

[Considerations for Engagement History](#)

When you work with Engagement History features, keep these considerations in mind.

[Report on Engagement History Data](#)

Engagement History gives you access to prospect engagement data in Salesforce. To better understand this data, create a custom report that contains engagement metrics alongside campaign and opportunity data. We recommend five common custom report types for reporting on Pardot assets.

[Comparison of Engagement History Features](#)

Engagement History is a generic term for a collection of fields, related lists, and other Lightning components that make it possible to show valuable prospect engagement data on your most used records.

[Resources](#)

Find out more about how to use Engagement History and reports.

EDITIONS

Available in: Lightning Experience

Available in: Pardot **Growth, Plus, Advanced**, or **Premium** Editions with Salesforce **Essentials, Professional, Enterprise, Performance, Unlimited**, and **Developer** Editions

USER PERMISSIONS

To use Engagement History:

- CRM User, Sales Cloud User, or Service Cloud User permission set

Considerations for Engagement History

When you work with Engagement History features, keep these considerations in mind.

Prerequisites for Engagement History Features

- Engagement History requires a verified Salesforce-Pardot connector.
- Connected Campaigns must be enabled for most features. When campaigns aren't connected, values show 0.

Setup and Storage

- Assets associated with connected campaigns are stored as records in Salesforce and apply to storage limits. Engagement activities on these assets remain in Pardot, and don't count toward Salesforce storage limits. For example, let's say an automated email in Pardot is synced to Salesforce as a list email record. This record counts toward your Salesforce storage limit, but the engagement activities associated with the record come directly from Pardot and don't count toward Salesforce storage.
- Engagement History metrics are refreshed every few minutes, typically less than 10.

EDITIONS

Available in: Lightning Experience

Available in: Pardot **Growth, Plus, Advanced**, or **Premium** Editions with Salesforce **Essentials, Professional, Enterprise, Performance, Unlimited**, and **Developer** Editions

- Engagement history data in the custom Lightning component is visible in Salesforce, but isn't available for reports. To see the most up-to-date information reload the page.
- Data from email sends to test lists is included in Engagement History and other reports. To exclude test list metrics, associate your test email with a test campaign.
- For help with setting up Engagement History features, Pardot admins can use the assistant in Marketing Setup.

Report on Engagement History Data

Engagement History gives you access to prospect engagement data in Salesforce. To better understand this data, create a custom report that contains engagement metrics alongside campaign and opportunity data. We recommend five common custom report types for reporting on Pardot assets.

Refer to the following lists to configure each custom report type, and use the steps to build the reports you want.

1. From Salesforce Setup, enter *Report* in the Quick Find box, and then select **Report Types**.
2. Click **New Custom Report Type**.
3. In the Fields Available for Reports section, click **Edit Layout**.
4. In the Field Layout Properties section, click **Create New Section**.
5. Give the section a title, and then drag the fields as outlined by the asset types listed here.

Campaigns Engagement

Primary Object: Campaigns

Section 1: Campaigns

Section 2: Parent Campaigns

Landing Pages Engagement

Primary Object: Campaigns

Relationship: Landing Page, where the A record has at least one related B record

Section 1: Landing Pages

Section 2: Campaigns

Section 3: Parent Campaigns

List Emails Engagement

This report includes any list email sent from Pardot or Sales Cloud. To include only emails sent from Pardot, filter the report with the From Address "Pardot Marketing Automation."

Primary Object: Campaigns

Relationship: List Email, where the A record has at least one related B record

Section 1: List Emails

Section 2: Campaigns

Section 3: Parent Campaigns

Marketing Forms Engagement

This report includes data associated with any form and form handler in Pardot. To show only forms or form handlers, add a filter on the Type field.

EDITIONS

Available in: Salesforce **Professional, Enterprise, Performance,** and **Unlimited** Editions with All Pardot Editions

USER PERMISSIONS

To create reports:

- Sales, Service, or CRM permission set
- AND
- Create and Customize Reports
- AND
- Report Builder

Primary Object: Campaigns

Relationship: Marketing Form, where the A record has at least one related B record

Section 1: Marketing Forms

Section 2: Campaigns

Section 3: Parent Campaigns

Marketing Links Engagement

This report includes data associated with any custom redirect or file in Pardot. To show only redirects or files, add a filter on the Type field.

Primary Object: Campaigns

Relationship: Marketing Link, where the A record has at least one related B record

Section 1: Marketing Links

Section 2: Campaigns

Section 3: Parent Campaigns

Comparison of Engagement History Features

Engagement History is a generic term for a collection of fields, related lists, and other Lightning components that make it possible to show valuable prospect engagement data on your most used records.

Note:

- All Engagement History components require a CRM User, Sales Cloud User, or Service Cloud User permission set.
- The majority of Engagement History components are available with all Pardot editions. Engagement History Dashboards require Growth, Plus, Advanced, or Premium edition.
- Components using the List Emails object include automated emails from Engagement Studio, completion actions, and automation rules. They don't include operational emails.
- Objects marked in this table with an asterisk (*) show engagement history data by default.

USER PERMISSIONS

To use Engagement History:

- CRM User, Sales Cloud User, or Service Cloud User permission set

Feature	Available On...	Data Storage	Prerequisites
Metrics Fields on page 5	<ul style="list-style-type: none"> • Campaign • Marketing Link* • Marketing Form* • Landing Page* • List Email 	Salesforce	<ul style="list-style-type: none"> • Connected Campaigns • Field-level security: Access to engagement history metrics
Related List (Marketing Assets) on page 7	Campaign	Salesforce	<ul style="list-style-type: none"> • Connected Campaigns
Related List (Activities) on page 8	<ul style="list-style-type: none"> • Lead • Contact • Account 	Pardot	<ul style="list-style-type: none"> • Logged in to Pardot via Salesforce SSO

Feature	Available On...	Data Storage	Prerequisites
	<ul style="list-style-type: none"> Person Account List Email Marketing Link* Marketing Form* Landing Page* 		
Engagement History Metrics Lightning Component on page 10	Campaign	Salesforce	<ul style="list-style-type: none"> Connected Campaigns
Engagement History Custom Lightning Component on page 11	<ul style="list-style-type: none"> Lead Contact Person Account 	Pardot	<ul style="list-style-type: none"> Logged in to Pardot via Salesforce SSO
Engagement History Dashboard Lightning Component	<ul style="list-style-type: none"> Campaign Account Lead Contact Person Account Opportunity 	Tableau CRM platform This data is updated every 8 hours.	<ul style="list-style-type: none"> Pardot permission set Connected Campaigns (for a dashboard on campaign records only)

[Using the Metrics Fields Component](#)

Add Engagement History metrics as fields on connected campaigns and asset records. You can also build a custom report based on the Campaign object. These tools can help you determine which marketing assets are most effective.

[Using Engagement History Metrics Related Lists](#)

Add the Engagement History Metrics related list to your campaign records to find the relationships that grow among campaigns, prospects, and assets.

[Using the Engagement History Related List](#)

The Engagement History related list includes an activity feed of recent prospect engagement. It appears by default on most of your marketing asset records, but you can also add it to your list email, lead, contact, account, or person account records.

[Using Engagement History Metrics Lightning Component](#)

Add the Engagement History Metrics Lightning component to your campaign records to show high-level metrics associated with the marketing assets in your connected campaigns.

[Using Engagement History Custom Lightning Component](#)

Add the Engagement History Custom Lightning component to your lead, contact, and person account records to show how people interact with your marketing assets. This component comes with your Pardot AppExchange package.

Using the Metrics Fields Component

Add Engagement History metrics as fields on connected campaigns and asset records. You can also build a custom report based on the Campaign object. These tools can help you determine which marketing assets are most effective.

What's Included?

- Engagement metrics from all asset types, via Salesforce connected campaign records
- Automated email metrics from after December 14, 2018

Note: This component doesn't include filtered visitor activity or activity associated with archived prospects.

EDITIONS

Available in: Salesforce
**Professional, Enterprise,
Performance, and
Unlimited** Editions with All
Pardot Editions

USER PERMISSIONS

To view Engagement History metrics:

- CRM User, Sales Cloud User, or Service Cloud User

Marketing Form		
Product Launch Webinar Registration		
Campaign	Total Views	Total Submissions
Product Launch Webinar	1,343	1,121
<div> <div>Related</div> <div>Details</div> </div>		
<div> <div>Information</div> <div> <div>Name</div> <div>Product Launch Webinar Registration</div> <div>Type</div> <div>Form</div> <div>Campaign</div> <div>Product Launch Webinar</div> </div> </div>		
<div> <div>Engagement Metrics</div> <div> <div>Total Views</div> <div>1,343</div> <div>Total Clicks</div> <div>0</div> <div>Unique Views</div> <div>1,208</div> <div>Unique Clicks</div> <div>0</div> <div>Total Submissions</div> <div>1,121</div> <div>Total Errors</div> <div>40</div> <div>Unique Submissions</div> <div>1,029</div> <div>Unique Errors</div> <div>40</div> <div>Submission Rate</div> <div>83.47%</div> <div>Error Rate</div> <div>2.98%</div> </div> </div>		

More About Metrics

To show any of these fields on campaign records, add them on the page layout. Choose the fields that make the most sense for your users, and group them under a section with a label, such as Engagement Metrics. By default, marketing asset records include the available metrics from this chart.

Salesforce Object	Associated Pardot Asset	Available Metrics
List Email	List emails and automated email (operational emails excluded)	<ul style="list-style-type: none"> • Total Delivered • Delivery Rate • Total Soft Bounced • Total Hard Bounced • Total Opens • Unique Opens • Open Rate Click Through Rate • Unique Click Through Rate • Click to Open Ratio • Unique Opt Outs • Opt Out Rate • Total Spam Complaints • Spam Complaint Rate • Total Tracked Link Clicks • Unique Tracked Link Clicks
Landing Page	Landing pages	<ul style="list-style-type: none"> • Total View • Unique Views • Total Form Submissions • Unique Form Submissions • Form Submission Rate • Total Form Errors • Unique Form Errors • Form Error Rate • Total Tracked Link Clicks • Unique Tracked Link Clicks
Marketing Link	Files and custom redirects	<ul style="list-style-type: none"> • Total Tracked Link Clicks • Unique Tracked Link Clicks
Marketing Form	Forms and form handlers	<ul style="list-style-type: none"> • Total View • Unique Views • Total Form Submissions • Unique Form Submissions

Salesforce Object	Associated Pardot Asset	Available Metrics
		<ul style="list-style-type: none"> Form Submission Rate Total Form Errors Unique Form Errors Form Error Rate Total Tracked Link Clicks Unique Tracked Link Clicks
Campaigns	N/A	<p>Two sets of these fields are available—to reflect the campaign and the campaign hierarchy.</p> <ul style="list-style-type: none"> Total Emails Delivered (via List Email object) Unique Email Opens (via List Email object) Unique Email Tracked Link Clicks (via List Email object) Total Form Views (via Marketing Form object) Total Form Submissions (via Marketing Form object) Unique Marketing Link Clicks (via Marketing Link object) Total Landing Page Views (via Landing Page object) Total Landing Page Form Submissions (via Landing Page object)

Using Engagement History Metrics Related Lists

Add the Engagement History Metrics related list to your campaign records to find the relationships that grow among campaigns, prospects, and assets.


What's Included?

- Engagement metrics from all asset types, via Salesforce connected campaign records
- Automated email metrics from after December 14, 2018

Note: This component doesn't show filtered visitor activity or activity associated with archived prospects.

EDITIONS

Available in: Salesforce **Professional, Enterprise, Performance,** and **Unlimited** Editions with All Pardot Editions

Website Tracking 			
Marketing Forms (3)			
NAME	TYPE	TOTAL VIEWS	TOTAL SUBMISSIONS
Contact Us	Form	13,140	7,857
Webinar Registration	Form	2,807	714
Free Trial Signup	Form Handler	0	1,799
View All			
Landing Pages (1)			
NAME	TOTAL VIEWS	TOTAL FORM SUBMISSIONS	FORM SUBMISSION RATE
Payroll Webinar Registration	971	488	50.26%
View All			

More About Engagement History Metrics

To display the metrics you need most, place Engagement History Metrics related list on your campaign records. The Metrics related list displays performance indicators for each asset type. For example, sends and opens for a list email, or views and form submissions for a landing page.

Related lists for Landing Page, List Email, Marketing Form, and Marketing Link are available in the related lists section of your page layouts.

The List Emails related list includes automated emails from Engagement Studio, completion actions, and automation rules. It doesn't include operational emails. The Program Name field isn't default on this related list, but you can add it in the page layout editor.

Using the Engagement History Related List

The Engagement History related list includes an activity feed of recent prospect engagement. It appears by default on most of your marketing asset records, but you can also add it to your list email, lead, contact, account, or person account records.

What's Included?

- Engagement metrics from all asset types, which originate in Pardot
- Some automated email activities, depending on where the related list is
- Localization based on Pardot locale setting (or Salesforce, when User Sync is in enabled)

Note: This component doesn't show filtered visitor activity or activity associated with archived prospects.

EDITIONS

Available in: Salesforce
Professional, Enterprise, Performance, and
Unlimited Editions with All
Pardot Editions

Engagement History (6+)				
Prospect	Marketing Asset	Asset Type	Activity Type	Activity Date
Justine Monahan	http://lenoxsoft.co...	Email Tracker	Click	3/10/2021, 8:56 ...
George Makris	Banner Ad	Custom Redirect	Click	3/10/2021, 8:55 ...
Justine Monahan	http://lenoxsoft.co...	Email Tracker	Click	3/10/2021, 7:59 ...
Justine Monahan	http://lenoxsoft.co...	Email Tracker	Click	3/10/2021, 7:23 ...
Debra Boehme	White Paper Down...	Form	Success	3/10/2021, 7:20 ...
Justine Monahan	http://lenoxsoft.co...	Email Tracker	Click	3/10/2021, 6:53 ...
View All				

More About Engagement History

To show this activity data on a record, drag the **Engagement History** related list to a tab on your page layout. We recommend placing it on a tab that doesn't load by default because a long list can affect page load speed.

This related list shows the last 30 days of data and presents different data fields depending on the object that displays it. Available fields for each object are listed in this chart.

Object	Available Fields
Account	<ul style="list-style-type: none"> Prospect Asset Name Asset Type Activity Type Activity Date
Lead, Contact, Person Account	<ul style="list-style-type: none"> Asset Name Asset Type Activity Type Activity Date
List Email, Marketing Form, Marketing Link, Landing Page	<ul style="list-style-type: none"> Prospect Activity Type Activity Date

Using Engagement History Metrics Lightning Component

Add the Engagement History Metrics Lightning component to your campaign records to show high-level metrics associated with the marketing assets in your connected campaigns.

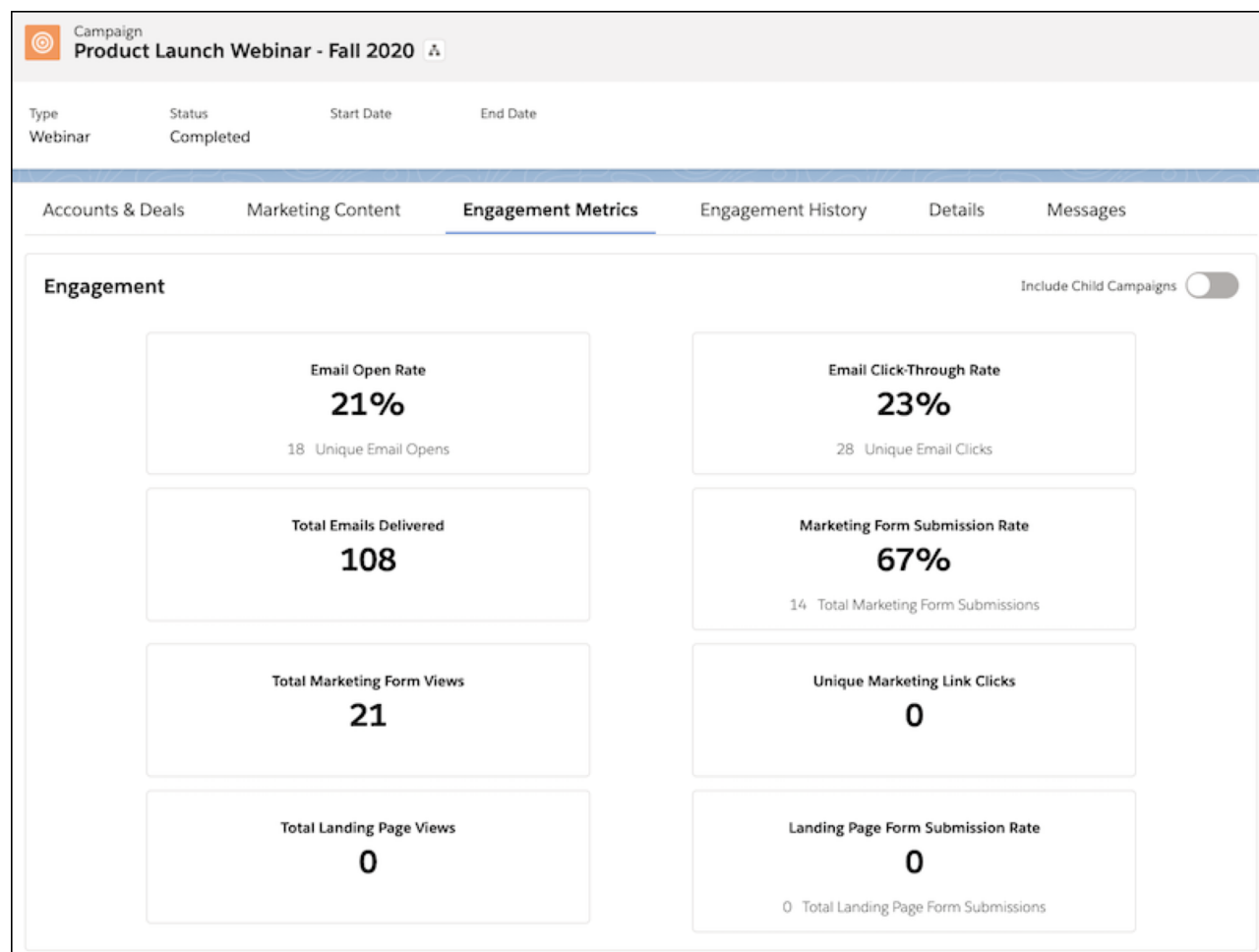
What's Included?

- Engagement metrics from all asset types, via Salesforce connected campaign records
- Automated email metrics from after December 14, 2018

Note: This component doesn't show filtered visitor activity or activity associated with archived prospects.

EDITIONS

Available in: Salesforce **Professional, Enterprise, Performance,** and **Unlimited** Editions with All Pardot Editions



To add this component, open the Lightning App Builder and look in the Standard components list. Select and drag the Engagement Metrics component into a tab on your page layout.

View a list of tracked activities in the [Engagement History Custom Lightning Component Activity Glossary](#).

Using Engagement History Custom Lightning Component

Add the Engagement History Custom Lightning component to your lead, contact, and person account records to show how people interact with your marketing assets. This component comes with your Pardot AppExchange package.

What's Included?

- Engagement activities from all asset types, which originate in Pardot
- Some automated email activities, depending on where the related list is
- Localization based on Pardot locale setting (or based on Salesforce, when User Sync is enabled)

Note: This component doesn't show filtered visitor activity or activity associated with archived prospects.

To add this component, open the Lightning App Builder and look in the Custom - Managed components list. Select and drag the Engagement History component into your page layout.

[Engagement History Custom Lightning Component Activity Glossary](#)

These prospect activities appear in the Engagement History Custom Lightning component. The component doesn't show activities for archived prospects.

EDITIONS

Available in: Salesforce **Professional, Enterprise, Performance,** and **Unlimited** Editions with All Pardot Editions

USER PERMISSIONS

To view Engagement History metrics:

- CRM User, Sales Cloud User, or Service Cloud User

Engagement History Custom Lightning Component Activity Glossary

These prospect activities appear in the Engagement History Custom Lightning component. The component doesn't show activities for archived prospects.

Activity	Description
AddThis Share	Prospect clicked an AddThis icon in an email and shared your marketing content.
Tracked Link Clicked	Prospect clicked a tracked link. Includes custom redirects and tracked links in emails, thank you content, and social messages.
Email Hard Bounce	Email sent to the prospect hard bounced due to an invalid email address. The prospect was automatically marked Do Not Email. If your account allows multiple prospects with the same email address, prospect records show a bounce if a prospect with the same email address bounces.
Email Open	Prospect opened an email.
Email Resubscribe	Prospect resubscribed to emails from the unsubscribe page.
Email Sent	Prospect was sent an email.
Email Soft Bounce	Email sent to the prospect soft bounced due to the prospect's mail server being unavailable. The prospect is still mailable, but is marked Do Not Email after five soft bounces. If your account allows multiple prospects with the same email address, the prospect record shows a bounce if a prospect with that email address bounces.

Activity	Description
Email Spam Complaint	Prospect reported spam from the prospect's email client. This prospect is marked Do Not Email.
Email Unsubscribe	Prospect clicked unsubscribe in a Pardot email or unsubscribed from an Email Preference Center. If your account allows multiple prospects with the same email address, prospect records show an unsubscribe if a prospect with that email address unsubscribes.
Email Preferences Open	Prospect viewed an email preference page.
Form View	Prospect viewed a form or form handler.
Form Error	Prospect had an error when submitting a form or form handler. Errors are often due to the prospect leaving a field blank or submitting invalid information.
Form Success	Prospect successfully submitted a form or form handler, including forms on landing pages.
Landing Page View	Prospect viewed a landing page.
File Accessed	Prospect clicked a link to a non-image file hosted by Pardot.
Olark Live Chat	Prospect contacted one of your users through the Olark live chat connector, and the chat conversation was recorded.
Opportunity Associated	Opportunity was associated with this prospect.
Opportunity Created	Opportunity was created for this prospect.
Opportunity Lost	Opportunity for this prospect was lost.
Opportunity Won	Opportunity for this prospect was won.
Priority Page View	Prospect viewed a priority page.
Site Search	Prospect searched for a term on your website's site search. The search term is also listed in the activity.
Wistia Video Viewed	Wistia video played or viewed.
Website Visit	A prospect's visitor session. Includes the number of pages viewed during the session and referrer information.
Webinar Attended	Prospect attended a webinar via GoToWebinar, WebEx, or ReadyTalk.
Webinar Registered	Prospect registered for a webinar via GoToWebinar, WebEx, or ReadyTalk.
Webinar Invited	Prospect invited to a webinar.
Webinar Accepted	Prospect accepted webinar invitation.
Webinar Absent	Prospect absent from a webinar that the prospect registered for via GoToWebinar, WebEx, or ReadyTalk.

Activity	Description
Event Registered	Prospect registered for an event.
Event Attended	Prospect attended an event.
Natural Search	Prospect visit resulting from natural search.
Paid Search	Prospect visit resulting from paid search.

Resources

Find out more about how to use Engagement History and reports.

- Blog: [How to Report on Marketing Activities with Engagement History](#)
- Knowledge Article: [Five recommended custom report types for Engagement History](#)

EDITIONS

Available in: Salesforce **Professional, Enterprise, Performance, and Unlimited** Editions with Pardot **Growth, Plus, Advanced, or Premium** Edition