

# Pardot Email Experience Implementation Guide

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# CONTENTS

Email for Pardot
Prerequisites for Setting Up Pardot Email
Using Email Templates and Email Content Together
Set Up Email in Pardot
Assign Admin Permissions for Pardot Email4
Create a Domain for Pardot Email
Configure Salesforce CMS for Pardot Email5
Assign User Permissions for Pardot Email
Pardot Email Experience Permissions
Design, Test, and Send Emails
Considerations for Designing and Sending Emails
Considerations for Using HML Fields for Emails in Lightning
Create Emails
Preview and Test Emails
Send Emails
Reuse Email Content for List Emails
Guidelines for Creating Custom Report Types for Email Content

# **EMAIL FOR PARDOT**

Connect with your customers with emails that are easy to design and that use the Salesforce platform. Build email templates or individual list emails, and customize those emails with HML merge fields. Reuse email content for easier email composing, and send and resend email content to different segments. Tailor the send experience and track email engagements to determine how well your email content is performing.

#### Prerequisites for Setting Up Pardot Email

Using the interactive email design experience in Pardot relies on a few other features.

#### Using Email Templates and Email Content Together

With the Pardot email experience, you can select an email template before you start building your email content. An email template is a reusable layout. It can help you boost productivity and encourage consistency among content creators, but it isn't a required component of a Pardot list email send. It's your choice whether email templates are a good fit for your business processes.

#### Set Up Email in Pardot

To set up Pardot email experience for interactive and engaging email design, we recommend that a Salesforce admin and a Pardot admin work together.

#### Design, Test, and Send Emails

Interactively design emails from scratch or from a template and send emails from the email content record. You can also preview and test your email before sending it.

#### Guidelines for Creating Custom Report Types for Email Content

Create custom report types that include email content and list email data. Marketers can then create reports to analyze and better understand the performance of their email content. Review the following guidelines and examples of reports.

### Prerequisites for Setting Up Pardot Email

Using the interactive email design experience in Pardot relies on a few other features.

To use Pardot email, Connected Campaigns and Handlebars Merge Language must be enabled. You must also have a verified Salesforce-Pardot Connector. Find out more about these features.

- Connect Pardot Campaigns to Salesforce Campaigns
- Personalize Pardot Content with Handlebars Merge Fields
- Setting Up a Salesforce-Pardot Connection for Accounts Purchased After February 11, 2019

If you need assistance navigating Marketing Setup or with other Salesforce basics, check out these trails and modules on Trailhead.

- Salesforce User Basics
- Navigate Setup
- User Management

#### EDITIONS

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

#### **EDITIONS**

# Using Email Templates and Email Content Together

With the Pardot email experience, you can select an email template before you start building your email content. An email template is a reusable layout. It can help you boost productivity and encourage consistency among content creators, but it isn't a required component of a Pardot list email send. It's your choice whether email templates are a good fit for your business processes.



**Note:** The email templates created in the Email Template Builder are used in Lightning Experience and Pardot Lightning App. Information about Pardot's classic email templates is also available: Classic Email Templates

In Lightning, a template made in the Email Template Builder is a basic layout that contains default content. You can use it as a starting point for customizing future email messages, or send it as-is. A Pardot email content record contains metadata and content that's used for one or more list email sends.

#### EDITIONS

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

#### **Email Templates**

Usage: The Email Template Builder is available for use by Pardot, Sales Cloud, and Service Cloud users. In Pardot, you can select an email template as the basis for creating an email content record. Sales and Service users can send their templates in a few ways, such as in High Velocity Sales or the docked composer.

Reporting: Standard reports for email templates include engagement metrics and usage. In Pardot, engagement metrics appear in the Email Content related list on an email template record.

#### Email Content

Usage: The drag-and-drop builder for email content is available in Pardot only. Email content records created in Pardot can't be shared to Sales or Service users.

Reporting: Engagement metrics appear in several places including the Email Sends related list, Engagement History, and List Email reports. You can review metrics on a specific send record or look at aggregate metrics on an email content record.

- Example: Marketing manager Gina creates an event invitation template that provides space for a banner, logistical information, and RSVP button. For brand consistency, she adds her company's default header and footer. She names it Template: Event Invitations. Later, the event specialist, Kamal creates an email content record for an upcoming meet and greet at a local restaurant. When he starts building the email, he selects Gina's template to work from. He fills in specific content in each area: an image from their last meet-and-greet, the restaurant name, the event time and date, and the link to where he's tracking RSVPs.
- **Example:** A few sales reps tell Gina that they also want to invite people to the meet-and-greet. She and Kamal create another email template with the event information. They name this public template Event Invitation: July Meet-and-Greet. Now the finalized template appears to all the sales reps so that they can send it directly to their leads and contacts.

# Set Up Email in Pardot

To set up Pardot email experience for interactive and engaging email design, we recommend that a Salesforce admin and a Pardot admin work together.



Note: Access to Salesforce CMS is included with any Salesforce edition that supports Pardot.

#### 1. Assign Admin Permissions for Pardot Email

Make sure that the person configuring Pardot email has the appropriate access. You can quickly create a permission set with the necessary permissions on the Email Setup page. A Salesforce admin is best equipped to assign the permissions that are required.

#### 2. Create a Domain for Pardot Email

When we store the images that you use in your emails, we associate them with a domain that you manage. Pardot email requires a domain that's configured using a content delivery network (CDN) over HTTPS. Select any verified domain that meets that criteria.

#### 3. Configure Salesforce CMS for Pardot Email

When you send email with Pardot, you can use Salesforce CMS as a unified image repository. The CMS workspace is where you can save files and control user access. The CMS channel determines where those files can be published. When you use CMS with Pardot email, the images published to your channel become available while marketers are building emails.

#### 4. Assign User Permissions for Pardot Email

To give users access to the Email Content object and to Salesforce CMS, assign permissions. A Salesforce admin is best equipped to assign the required permissions.

#### 5. Pardot Email Experience Permissions

Various permissions are necessary to set up, create, and send Pardot email with the drag-and-drop builder.

#### EDITIONS

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

#### USER PERMISSIONS

To connect Pardot and Salesforce:

Customize Application
 AND

Modify All Data

To connect campaigns:

 Pardot Administrator role AND

B2B Marketing Automation App permission set license

To configure Salesforce CMS:

 Modify All Data OR

Create CMS Workspaces and Channels

# Assign Admin Permissions for Pardot Email

Make sure that the person configuring Pardot email has the appropriate access. You can quickly create a permission set with the necessary permissions on the Email Setup page. A Salesforce admin is best equipped to assign the permissions that are required.

- 1. From Marketing Setup, in the Quick Find Box, enter *Email*, and then select **Email Setup**.
- 2. To create the necessary permission set, click Create Permission Set and save.
- 3. From Setup, click Manage Assignments.
- 4. On the permission set page, click Manage Assignments again.
- 5. To select the admin user who configures email, click Add Assignments.
- 6. Select a user, and then click Assign.
- 7. For easy access to Salesforce CMS, add the CMS Workspaces and CMS Channels tabs to your Pardot Lightning App toolbar.

# Create a Domain for Pardot Email

When we store the images that you use in your emails, we associate them with a domain that you manage. Pardot email requires a domain that's configured using a content delivery network (CDN) over HTTPS. Select any verified domain that meets that criteria.

You have three choices when selecting a domain.

- A deployed My Domain: Set Up My Domain
- An existing domain that uses a content delivery network (CDN) over HTTPS.
- A new domain.

To verify a new domain, follow these steps.

- 1. From Marketing Setup, in the Quick Find box, enter *Email*, and then select **Email Setup**.
- 2. Click Manage Domains, and then click Add a Domain.
- 3. Using the information at the top of the form, work with your webmaster to update the CNAME record at your domain registrar. You can update the root domain (company.com) or a subdomain (email.company.com).
- **4.** After the changes are complete, return to Setup and enter the subdomain in the Domain Name field.

It can take up to 24 hours for the host changes to become available to Salesforce.

5. For the HTTPS Option, select the Content Delivery Network (CDN) option.

#### **EDITIONS**

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

#### USER PERMISSIONS

To access Marketing Setup:

 View Setup and Configuration
 AND

**Customize Application** 

To create permission sets:

Manage Profiles and
 Permission Sets

To assign permission sets:

• Assign Permission Sets

#### EDITIONS

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

#### **USER PERMISSIONS**

To add a domain:

- Customize Application
   OR
  - View Setup and Configuration

To edit a domain:

Customize Application

	Save Save & New Cancel
Domain Name	mycompany 🔳
HTTPS Option i	O Salesforce serves the domain over HTTPS, on Salesforce's servers, using your HTTPS certificate
	Salesforce serves the domain over HTTPS, using a Salesforce content delivery network (CDN) partner and a shared HTTPS certificate
	1. If you select this option, your domain name must be a CNAME record that points to [domain].00db000000mvdmmao.live.siteforce.com. 2. If you enable this feature, this domain will use a CDN service (Akamai) to optimize its content delivery. All information sent to or returned by this domain will be stored and transmitted through the CDN service. See the documentation for more details, including technical limitations.
	A non-Salesforce host or service serves this domain over HTTPS
	Enter your external hostname O Salesforce serves the domain over HTTP without support for HTTPS access

6. Save the domain.

Your domain is now awaiting activation. When it's ready, an activation button appears.

7. On the Domains list, click **Activate** in the Action column.

### Configure Salesforce CMS for Pardot Email

When you send email with Pardot, you can use Salesforce CMS as a unified image repository. The CMS workspace is where you can save files and control user access. The CMS channel determines where those files can be published. When you use CMS with Pardot email, the images published to your channel become available while marketers are building emails.

CMS contributors must have the Salesforce user license.

- 1. Click the CMS Home action menu, select CMS Channel, and then click Create Channel.
- 2. Name the channel something descriptive, such as Pardot Content or a business unit name, and then save it. You can edit the channel name at any time.
- 3. Edit the new channel to configure its domain.
  - **a.** From the channel list, click the action menu, and then select **Edit**.
  - **b.** Select **Enable Domain**, choose the domain you configured from the dropdown, and then save.
- 4. Click the CMS Home action menu, select CMS Workspace, and then click Add Workspace.
- 5. To configure your workspace, follow the prompts.
  - a. Name the workspace and select the channel you want to include.
  - b. Select the Salesforce users that need access to the workspace, and then select a role for each.A content manager has full access to a workspace's files. A content admin can also edit the workspace settings.
  - c. Select the languages you want to support and include a default language.
  - **d.** Review your settings, and then click **Done**.
- 6. From the Email Setup page, click Select Channel, choose the one you created from the dropdown, and save.

#### **EDITIONS**

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

#### USER PERMISSIONS

To configure Salesforce CMS:

Modify All Data
 OR

Create CMS Workspaces and Channels

### Assign User Permissions for Pardot Email

To give users access to the Email Content object and to Salesforce CMS, assign permissions. A Salesforce admin is best equipped to assign the required permissions.

- 1. From Marketing Setup, in the Quick Find box, enter *Email*, and then select **Email Setup**.
- 2. Click Manage Assignments.
- 3. On the Use CMS with Email Templates and Email Content permission set page, click Manage Assignments.
- 4. Click Add Assignments, and then select the users who need the permission set.
- 5. Click Assign.
- 6. For easy access to CMS, encourage users to add CMS tabs to their toolbar.
  - a. Open the Pardot Lightning App.
  - **b.** To edit tabs, click 
    on the toolbar.
  - c. Click Add More Items.
  - d. With All selected, search for CMS and select CMS Workspaces and CMS Channels.
  - e. Click Add 2 Nav Items and save.
  - Note: To allow a non-admin user to create workspaces and channels in Salesforce CMS, assign the Create CMS Channels and Workspaces system permission.

## Pardot Email Experience Permissions

Various permissions are necessary to set up, create, and send Pardot email with the drag-and-drop builder.

### Permission Sets and User Roles

An admin can create the Use CMS with Email Templates and Content permission set on the Email Setup page of Marketing Setup. It automatically includes access to the drag-and-drop builder, ability to manage email content, and access to Salesforce CMS (Content Management System) and its Channels and Workspace tabs.

To preview, test, or send an email, users must also have a Marketing user role in Pardot, or the individual permissions indicated in the table.

### Individual Permissions

Permission Name	Location	Туре	Description	Configuration
Access Drag and Drop Content Builder	Salesforce Setup	System Permissions	Provides access to the email content builder in Pardot Lightning App	On

#### **EDITIONS**

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

#### USER PERMISSIONS

To access Marketing Setup:

 View Setup and Configuration
 AND

**Customize Application** 

To create permission sets:

 Manage Profiles and Permission Sets

To assign permission sets:

• Assign Permission Sets

#### **EDITIONS**

Permission Name	Location	Туре	Description	Configuration
Manage Email Content	Salesforce Setup	System Permissions	Allows users to create, edit, and delete email content	On
Create CMS Workspaces and Channels	Salesforce Setup	System Permissions	Allows non-admin users to create channels and workspaces in Salesforce CMS	Optional
Salesforce CMS (standardSalesforceCMS)	Salesforce Setup	App Assignments	Provides access to Salesforce CMS	On
CMS Channels	Salesforce Setup	Object Settings	Makes the CMS Channels tab available for selection in Pardot Lightning App	Available, Visible
CMS Workspaces	Salesforce Setup	Object Settings	Makes the CMS Workspaces tab available for selection in Pardot Lightning App	Available, Visible
Prospects	Pardot Settings, User Roles	Prospects tab	Provides access to Pardot prospect record data	View
Campaigns	Pardot Settings, User Roles	Marketing tab	Provides access to Pardot campaigns data	View
Emails	Pardot Settings, User Roles	Marketing tab	Provides access to Pardot emails and sending pipeline	Create/Edit, Send to List
Segmentation Lists	Pardot Settings, User Roles	Marketing tab	Provides access to Pardot lists	View

### Design, Test, and Send Emails

Interactively design emails from scratch or from a template and send emails from the email content record. You can also preview and test your email before sending it.

Considerations for Designing and Sending Emails

Review these considerations before using the Pardot email experience.

Considerations for Using HML Fields for Emails in Lightning

Some HML merge fields in Salesforce aren't supported in Pardot. Map custom fields in Pardot to existing Salesforce fields to use Pardot field values in your emails. Keep these scenarios in mind when using HML fields in email in lightning.

#### Create Emails

Provide basic email information to create an email content record, and then build from scratch or edit existing email content. To make email creation even easier, start from an email template and reuse email designs.

#### **EDITIONS**

#### Preview and Test Emails

Before sending your email, preview it as a specific prospect, and then test send it to troubleshoot any personalization issues. You can send a test email to a test list or to individual email addresses.

#### Send Emails

After you design your email content, define a campaign, an audience, tracker domain, sender options, and completion actions.

#### Reuse Email Content for List Emails

Edit and reuse existing email content to create and send new emails. Resend email content to different recipients and segments as unique list email sends. You can also view related email sends for specific email content.

### Considerations for Designing and Sending Emails

Review these considerations before using the Pardot email experience.

### Browser and Edition Availability

- The email design and send experience is available only in the Pardot Lightning App. Use the classic editor in Pardot Classic, the standalone Pardot app, or the Salesforce mobile app.
- You can test Pardot Email in sandboxes, but emails don't send. To test the CMS image repository integration, deploy My Domain to the sandbox and select the default CDN domain during channel setup.

• Support for managing and sending email content is limited in Developer Edition orgs. Access to Salesforce CMS images and the ability to send an email aren't enabled.

Internet Explorer 11 and Microsoft Edge aren't supported browsers for designing emails in this experience.

### Email Content and CMS Management

- Users with the Manage Email Content user permission see all email content records. You can't filter or hide email content records.
- You can't delete an email content record with related sends.
- Email content records can't be recovered after deletion.
- To upload a CMS image when designing emails, a user must be a contributor to the associated CMS workspace.

### **Building and Tracking Emails**

- You can edit the HTML Body field in the drag-and-drop editor only. The field isn't editable on the email content record or via the API.
- Pardot Merge Language (PML) variable tags aren't supported. Use Handlebars Merge Language merge fields instead.
- Pardot-only standard and custom fields are unavailable as HML merge fields. Use Salesforce standard and custom fields instead. Or, map your custom Pardot fields to Salesforce fields.
- The following tools aren't supported: folders, dynamic content, snippets, and A/B testing.
- The domain associated with the CMS channel is only visible to customers in image URLs and email source code.

### Pardot Business Units

• Your CMS channel is related to one domain and used for all sends. If you use Pardot Business Units, the same domain and channel is always used.

EDITIONS

• Email content and templates ignore an asset's business unit assignment when tracking engagement. For example, if you send Business Unit A's form through an email connected to Business Unit B, we still attribute the form engagement to Business Unit A.

#### Images

- You can select images from a single Salesforce CMS channel only. Salesforce Files aren't supported and don't load when emails are sent.
- Always use a publicly available, absolute URL for your links.
- SVG images and other active content aren't supported in email content.

### **Email Templates**

- To select an email template for use with email content, make sure that the template doesn't contain Salesforce Files. Also, the related entity type must be Lead, Contact, or None.
- Enhanced letterhead isn't supported for email templates built in the Email Template Builder.
- When you change the email template on the email content record, the Subject and HTML Body fields are overwritten with the template values. These two field values remain if you remove the template later, but don't replace it.
- We recommend that you avoid including Pardot-only merge tags, such as Email Preference Center, in an email template. When Sales or Service users select an email template to send to a lead or contact, the Pardot tags break.
- You can't create via API an email template that uses the enhanced sending experience.

### Allocations

- The maximum character allowance for the HTML Body and Text Body fields is 384,000 characters.
- You can send a test email to a maximum of 10 test lists of 100 recipients each. Or, you can send a test to up to 50 individual addresses.
- If you exceed the character limit for an HTML component, try splitting the content into two HTML blocks.

## Considerations for Using HML Fields for Emails in Lightning

Some HML merge fields in Salesforce aren't supported in Pardot. Map custom fields in Pardot to existing Salesforce fields to use Pardot field values in your emails. Keep these scenarios in mind when using HML fields in email in lightning.

Pardot-only custom fields aren't available for selection in email content.

Field Scenario	Is the field available for selection in the builder?	Syntax is the Same Between Salesforce and Pardot Fields	Data displayed in the merge field when the email sends
Salesforce and Pardot both have the field by default	Yes	Yes	The email displays the field data in Pardot
Pardot custom field is synced to a Salesforce default field	Yes	Yes	The email displays the field data in Pardot

#### **EDITIONS**

Field Scenario	Is the field available for selection in the builder?	Syntax is the Same Between Salesforce and Pardot Fields	Data displayed in the merge field when the email sends
Pardot custom field is synced to a Salesforce custom field	Yes	Yes	The email displays the field data in Pardot
Field is only in Salesforce as a default or custom field	Yes	N/A	Unable to send the email in lightning
Field is only in Salesforce as a default or custom field but has the same field name as a Pardot field_i	Yes	Yes	The email displays the field data in Pardot

### Create Emails

Provide basic email information to create an email content record, and then build from scratch or edit existing email content. To make email creation even easier, start from an email template and reuse email designs.

The email Subject and HTML Body field content is copied from the template selected.

- 1. From the Email Content tab, click New.
- 2. Enter an email name for internal use.
- To begin from an email template, select a template.
   Only email templates created from the email template builder are available for selection.
- 4. Click Save.
- 5. To add components and customize your content, click Edit in Builder.
- **6.** Click a component from the list and drag it into the canvas where you want the component to appear.

An editing pane appears where you can add content and style fields.

7. When you're done adding content, save your work.

To work with the text-only version of your email, edit the email content record. In the Text Body field, enter new text, or click **Sync from HTML** to use the text you added in the builder.

#### EDITIONS

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

#### USER PERMISSIONS

To build an email:

 Manage Email Content AND

> Access Drag-and-Drop Content Builder

# Preview and Test Emails

Before sending your email, preview it as a specific prospect, and then test send it to troubleshoot any personalization issues. You can send a test email to a test list or to individual email addresses.

Note: 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.

- 1. Navigate to the email content record for the email that you want to preview or test.
- 2. Select **Preview As** from the dropdown, and then select a prospect. Links aren't available in email preview.
- **3.** Select **Test** from the dropdown. Select a Pardot list or enter individual email addresses. Test emails don't include merge field data.

#### **EDITIONS**

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

#### USER PERMISSIONS

To preview an email:

 Manage Email Content AND

> Pardot Admin or Marketing user role

OR

Custom Pardot user role that includes View on Prospects

To send a test email:

 Manage Email Content AND

> Pardot Admin or Marketing user role

OR

A custom Pardot user role that includes Create/Edit and Send to List on Email, View on Campaign, and View on Segmentation Lists

### Send Emails

After you design your email content, define a campaign, an audience, tracker domain, sender options, and completion actions.

You can send an email content record as many times as needed. Send it immediately or schedule it for later. Pardot Advanced and Premium users can also choose to send with Einstein Send Time Optimization.

- 1. Open the email content record you want to send.
- 2. In the action menu, click Send.
- 3. Enter the required values, such as campaign, recipient list, and sender information.

	Send Meet and G	ireet Yay!	
Campaign Delect a campaign to associate with your email Campaign Search campaigns	ı	0	salesforce
mail Recipients o define who to send your email to, select up Recipient Lists	to 10 recipient lists and 5 suppression lists. Suppression Lists		MARTI CREET
Search lists	Q. Search lists	Q	
ender Options Sender Name	* Sender Email		
Type name	Type email address	=	Vacata prozentine 1939/05/maig
eply-to Email			
Type email address f you don't specify a reply-to name and addre	ss, email replies are sent to the sender.	Se	nd Time Send Now Send Later

4. To configure completion actions, enable a trigger type and then, select the action.

nabled	Take action when a prospect opens this email.		
	Action	Score	
	Adjust score	• +1	
	+ Add Action		
isabled	Take action when a prospe	ct clicks a link in this email.	
nabled	Take action when a prospect unsubscribes via this email.		
	Action	List	
	Remove from list	<ul> <li>Annual Conference Event Invitees</li> </ul>	>

#### 5. Select Send Now or Send Later.

If you select Send Later, enter a date and time for sending.

6. Click Send.

#### EDITIONS

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

#### USER PERMISSIONS

To send an email:

 Manage Email Content AND

> Pardot Admin or Marketing user role

OR

A custom Pardot user role that includes Send to List on Emails, View on Segmentation Lists, and View on Campaigns

### **Reuse Email Content for List Emails**

Edit and reuse existing email content to create and send new emails. Resend email content to different recipients and segments as unique list email sends. You can also view related email sends for specific email content.

- 1. From the Email Content tab, select an email content record to resend or edit.
- 2. Edit the email information and content from the record, or click **Edit in Builder** to add components and customizations.

Editing an existing email content record changes the content for that record. It doesn't change previously sent emails or create a unique email content record.

**3.** Click **Send** from the record and define recipients, campaign association, and completion actions. Each email sent creates a new send record and relates it to the email content record.

You can view list emails sent from an email content record on the Related tab of the record.

#### **EDITIONS**

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

#### USER PERMISSIONS

To send an email:

 Manage Email Content AND

Access Drag-and-Drop Content Builder

# Guidelines for Creating Custom Report Types for Email Content

Create custom report types that include email content and list email data. Marketers can then create reports to analyze and better understand the performance of their email content. Review the following guidelines and examples of reports.

- To create reports that pull data from the email content record, select Email Content as the primary object when creating a custom report type. With Email Content as the primary object, marketers could create a report for all engagement statistics by email content record.
- To get more report options for all list emails including emails sent from the email content record, add list email as a related object on the custom report. With Email Content and List Email as objects on the report, marketers could create a report that shows all email sends and related statistics by email content record.
- With List Email as the primary object, marketers could create a report with email sends and related statistics for a given campaign.

#### **EDITIONS**

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

#### USER PERMISSIONS

To create reports:

 Sales, Service, or CRM permission set AND

> Create and Customize Reports

AND

Report Builder