Pardot Email Experience Implementation Guide

Salesforce, Summer ‘21

’21

@salesforcedocs
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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 HTML 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.

**Considerations for Designing and Sending Emails**

The email experience available for Pardot marketers in the Pardot Lightning App allows marketers to interactively create engaging email content that they can send and track. The overall experience gives marketers control over their email content and email sends. The experience includes email template and content drag-and-drop capabilities, an associated email content record, and a send experience. Review the considerations and limitations before using.

**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.

**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.

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**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
Considerations for Designing and Sending Emails

The email experience available for Pardot marketers in the Pardot Lightning App allows marketers to interactively create engaging email content that they can send and track. The overall experience gives marketers control over their email content and email sends. The experience includes email template and content drag-and-drop capabilities, an associated email content record, and a send experience. Review the considerations and limitations before using.

Access and Availability for Email Content

- The email design capabilities, tailored send experience, and subsequent tracking options are available only in the Pardot Lightning App. They aren’t available 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, you must deploy My Domain to the sandbox and select the default CDN domain during channel setup.
- Users with the Manage Email Content user permission see all email content records. You can’t filter or hide email content records.
- 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.
- To upload a CMS image when designing emails, the user must be a contributor to the associated CMS workspace.
- Internet Explorer 11 and Microsoft Edge aren’t supported browsers for designing emails in this experience.

Building and Sending Emails

- You can only edit the HTML Body field in the drag-and-drop design of emails. You can’t edit the field on the record or from the API.
- You can provide a text-only version of an email or you can click Sync from HTML on the record to generate a text version automatically. Syncing from HTML overwrites any existing content in the Text Body field.
- PML variable tags aren’t supported. HML merge fields are available when you’re designing emails.
- Marketers can’t add Pardot-only standard and custom fields as HML merge fields in their email content. However, they can add Salesforce standard and custom fields. To use Pardot field values in email content, map custom fields in Pardot to Salesforce fields.
- Folders aren’t supported on email content records.
- Dynamic content and snippets aren’t supported in building email content.
- A/B testing isn’t supported for emails from the email content record.
- You can’t delete an email content record with related sends.
- Email content records can’t be recovered after deletion.

Images

- You can only use images from Salesforce CMS in email content sent from Pardot. Images from Salesforce Files aren’t supported in email content. Manually entered references to Salesforce Files aren’t resolved when the email is sent.
- The maximum CMS image size is 25 megabytes. The number of images that you can add to an email isn’t limited.
- Unauthenticated links or nonpublic links to an image aren’t supported.
- SVG type images aren’t supported in Salesforce File or CMS images used in designing email content or templates.
You can only enable one CMS channel for designing email content or templates.

**Email Templates**

- Builder email templates can’t be created from the API. Any email template created via the API is a nonbuilder email template.
- Enhanced letterhead isn’t supported for email templates built in the Email Template Builder.
- Only email templates created in the Email Template Builder that don’t contain Salesforce Files are available to select on an email content record.
- Only email templates with a related entity type of Lead, Contact, or None are available for selection on the email content record.
- If an email template is selected when creating email content, the Subject and HTML Body fields are copied from the template.
- Replacing the email template on the email content record overwrites the Subject and HTML Body fields.
- Removing an email template from an email content record removes only the association between the records. It doesn’t clear the Subject or HTML Body fields on the email content record.

**Allocations**

- The maximum character allowance for the HTML Body and Text Body fields is 384,000 characters.
- You can add a maximum of six columns in a row layout when designing email content or templates.
- You can send a test email to a maximum of 10 test lists.
- A test list can have a maximum of 100 recipients.
- You can send a test email to a maximum of 50 individual email addresses.
- The number of recipients on an email isn’t limited.
- You can add a maximum of 200 merge fields to email content.
- You can have a maximum of 250 components per email template or email content.
- You can have a maximum of 100 components per region (component container).
- You can have a maximum of 10,000 characters for each component’s property value.

In the HTML Value field of the HTML component, clicking Format can cause the field to exceed the character limit. Undo the formatting or shorten the HTML, and then add an HTML block for the rest of the content.

**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.

<table>
<thead>
<tr>
<th>Field Scenario</th>
<th>Is the field available for selection in the builder?</th>
<th>Syntax is the Same Between Salesforce and Pardot Fields</th>
<th>Data displayed in the merge field when the email sends</th>
</tr>
</thead>
<tbody>
<tr>
<td>Salesforce and Pardot both have the field by default</td>
<td>Yes</td>
<td>Yes</td>
<td>The email displays the field data in Pardot</td>
</tr>
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<td>----------------</td>
<td>--------------------------------------------------</td>
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<td>---------------------------------</td>
</tr>
<tr>
<td>Pardot custom field is synced to a Salesforce default field</td>
<td>Yes</td>
<td>Yes</td>
<td>The email displays the field data in Pardot</td>
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<tr>
<td>Pardot custom field is synced to a Salesforce custom field</td>
<td>Yes</td>
<td>Yes</td>
<td>The email displays the field data in Pardot</td>
</tr>
<tr>
<td>Field is only in Salesforce as a default or custom field</td>
<td>Yes</td>
<td>N/A</td>
<td>Unable to send the email in lightning</td>
</tr>
<tr>
<td>Field is only in Salesforce as a default or custom field but has the same field name as a Pardot field</td>
<td>Yes</td>
<td>Yes</td>
<td>The email displays the field data in Pardot</td>
</tr>
</tbody>
</table>

## 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 the person configuring Pardot email has the appropriate access. 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 as an image repository for use with email in Pardot, assign permissions.
Assign Admin Permissions for Pardot Email

Make sure the person configuring Pardot email has the appropriate access. 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 and then, click Manage Assignments again.
4. To select the admin user who is going to configure email, click Add Assignments to select the admin user, and then click Assign.
5. For easy access to 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.

• To use a My Domain default CDN domain, configure My Domain. Then, skip this task and move on to configuring Salesforce CMS on page 6.
• You can select an existing verified domain that uses a content delivery network (CDN) over HTTPS. If you have a domain that meets this criteria, you can skip this task and move on to configure CMS on page 6.
• To verify a new domain that uses a CDN over HTTPS, follow these steps before you continue.

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.
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.

1. Click the CMS Home action menu, select **CMS Channel**, and then click **Create Channel**.
2. Name the channel something descriptive, such as Pardot Email or a business unit name, and then save it.
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.
Assign User Permissions for Pardot Email

To give users access to the Email Content object and to Salesforce CMS as an image repository for use with email in Pardot, assign permissions.

1. From Marketing Setup, in the Quick Find box, enter Permissions, and then select Permission Sets.

2. Find the Use CMS with Email Templates and Email Content permission set and click Manage Assignments.
   If this permission set isn’t available, create it on the Setup page: Assign Admin Permissions for Pardot Email on page 5.

3. To give the permission set to marketing users, click Add Assignments, select the users, and save.

4. For easy access to CMS, users can add CMS tabs to their toolbar.
   a. To edit tabs, click on the Pardot Lightning App toolbar.
   b. Click Add More Items.
   c. With All selected, search for CMS and select CMS Workspaces and CMS Channels.
   d. Click Add 2 Nav Items and save.

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.

Create Emails
Start building emails by providing basic email information. Create emails from scratch or edit existing email content. You can also start from an email template to reuse email designs and make building email content even easier. Building email content creates an associated email content record.

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

Send Emails
After designing your email content, define who to send it to before sending it as a list email. Select a campaign, recipient and suppression lists, sender options such as send from name and email, and completion actions. You can also specify how replies are handled.

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.
Create Emails

Start building emails by providing basic email information. Create emails from scratch or edit existing email content. You can also start from an email template to reuse email designs and make building email content even easier. Building email content creates an associated email content record.

The email Subject and HTML Body field content is copied from the template selected. Replacing the email template on the email content record overwrites the Subject and HTML content. If the email content record has related list emails associated with it, you can’t change the email template.

1. From the Email Content tab, click New.
2. Enter an email name. The email name is distinct from the email subject and used for the email content record.
3. To begin from an email template, select a template. Only email templates created from the email template builder are available for selection. Email templates available to select don’t contain Salesforce files.
4. Click Save. To save the email as a record and create another email, click Save and New.
5. Edit the email information and content from the record, or click Edit in Builder to add components and customizations.

Preview and Test Emails

Before sending your email, preview it as a specific prospect, and test send it to troubleshoot any personalization issues. You can send a test email to a test list or 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 you want to preview or test.
2. Select Preview As from the dropdown and select a prospect for which the email would display. 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.
Send Emails

After designing your email content, define who to send it to before sending it as a list email. Select a campaign, recipient and suppression lists, sender options such as send from name and email, and completion actions. You can also specify how replies are handled.

When you’re ready to send an email, click Send from the email content record. Complete required fields and further define how the email is sent.

- Select a campaign that is associated with the email.
- Select up to 10 recipient lists and 5 suppression lists.
- Enter a sender name and email address that appears for recipients. You can also specify a reply-to email address where replies are sent. If a reply-to address isn’t provided, replies are sent to the address in the Sender Email field.
- Add completion actions that automate certain tasks when prospects interact with your email.
- Schedule your email to send later.

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.
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.