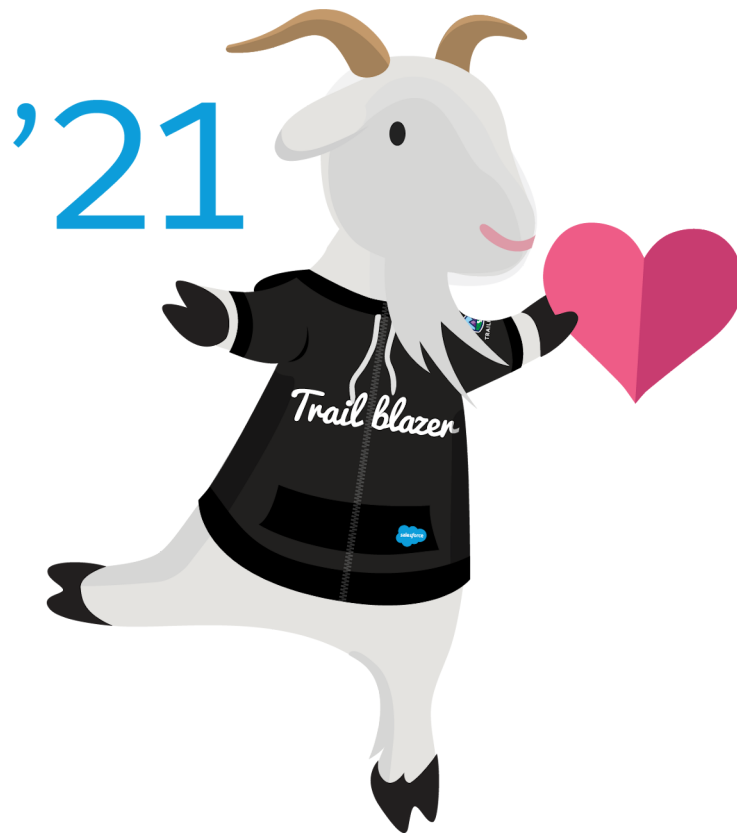




Salesforce-Pardot Connector Implementation Guide

Salesforce, Summer '21



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SETTING UP THE SALESFORCE-PARDOT CONNECTOR FOR ACCOUNTS PURCHASED BEFORE FEBRUARY 11, 2019

The Salesforce-Pardot connector syncs prospect and opportunity data between Pardot and Salesforce. Pardot can sync with Salesforce Professional Edition accounts or higher. If you purchased Pardot before February 11, 2019, follow these steps to install and configure the Salesforce-Pardot connector.

 **Tip:** For easier navigation, download the [PDF version of these instructions](#).

Considerations for Using the Salesforce-Pardot Connector

Before setting up your Salesforce-Pardot connector (v1), or unpausing your connector (v2), review considerations such as syncing fields and prospects, mapping users, and other setup tasks.

Considerations for Accounts That Allow Multiple Prospects with the Same Email Address

The most important aspect of the Salesforce sync is creating a one-to-one relationship between a Pardot prospect and a Salesforce lead, contact, or person account. The Salesforce connector uses CRM ID as the matching criteria for syncing in both directions in accounts that allow multiple prospects with the same email address.

Step 1: Install the Salesforce-Pardot Connector (Connector v1)

After you install the Pardot package, make sure that your connector user has the appropriate permissions. Then create the connector in Pardot. This process applies only to version 1 of the Salesforce-Pardot connector.

Step 2: Configure Salesforce for the Salesforce-Pardot Connector

During configuration, a Salesforce admin can map custom fields, add Pardot components to page layouts, and grant Pardot data access to users.

Step 3: Configure Pardot

A Pardot admin can map custom fields and users, test the connector, and perform an initial prospect sync.

Considerations for Using the Salesforce-Pardot Connector

Before setting up your Salesforce-Pardot connector (v1), or unpausing your connector (v2), review considerations such as syncing fields and prospects, mapping users, and other setup tasks.

General

- You can have only one Salesforce connector in Pardot.
- If your Salesforce org has clickjack protection enabled, add a clickjack protection-compatible Visualforce page to view Pardot data in Salesforce.
- Pardot can integrate with Salesforce Person Account record types. To enable person account syncing, contact Pardot Support.
- Importing prospects into Pardot causes them to sync with Salesforce. Unassigned prospects sync to Salesforce, but records aren't created when there is no matching email address.
- Pardot checks for changes in Salesforce and Pardot up to every 2 minutes. If you're seeing slower sync times, contact Pardot Support. If you're updating a large volume of records at a time, it can take longer for all changes to sync.

Connector Version 2

The following applies when using Connector version 2.

- When your Pardot account is provisioned, the connector is created in a paused state. Before unpausing the connector to begin syncing, review the settings and configure Marketing Data Sharing if you want to use it. Records don't sync until the connector is unpaused. Prospects can be manually synced with **Sync with CRM** on a prospect record, or **Send to Pardot** on a lead or contact record.
- The integration user has access to all records that can sync between Salesforce and Pardot. If you want to control which records are shared, set up Marketing Data Sharing. If you don't want to use Marketing Data Sharing, you can change the connector user to a user with your preferred permissions. For details, see [Pardot Integration User](#).
- If you link multiple Pardot accounts to one Salesforce account, you can't use the integration user unless you're also using Marketing Data Sharing

Syncing Fields Between Salesforce and Pardot

- Salesforce updates to prospect fields can trigger Pardot automation rules when rules related to those fields exist.
- Prospects that are assigned to a user in Pardot are created as a lead when the prospect is not syncing with a record in Salesforce.

Mapping Pardot Users to Salesforce Users

Map Pardot users with assigned prospects to Salesforce users before syncing. If a prospect's assigned user isn't mapped to a Salesforce user, the prospect is assigned to the Salesforce connector user.

Syncing Prospects

- Pardot syncs on the individual level, not the company level.
- Pardot syncs according to CRM ID. The prospect must have the same CRM ID in Pardot and Salesforce to sync.
- Pardot looks for a matching CRM ID to sync with. If a prospect is not syncing with a Salesforce record, Pardot creates a lead to sync with.
- If a prospect record doesn't have a CRM ID and a record with the email address exists in Salesforce, Pardot syncs to the record. If there are multiple records in Salesforce with the same email address as the prospect, Pardot syncs with the first record it finds.

Syncing Prospect Activity and Email

- Pardot activities, such as page views, form completions, site searches, and emails, appear in the Prospect Activities window in the prospect's CRM record. However, only emails are created as a CRM activity or task.
- Pardot logs an email in the activity section of the CRM record when sending out a list email or a one-to-one email using the Pardot plug-in.
- Email syncing is controlled in your connector settings.

Syncing Opportunities

- Opportunity activities are included in the default scoring (+50 points for created opportunity, -100 points for lost opportunity). When the connector is enabled, prospect scores update accordingly. Score updates can affect automation or lead assignment rules already in place.

- If you do not use opportunities in Salesforce, Pardot support can disable opportunity syncing.
- If Salesforce has duplicate records, the activity iframe appears in all the records. However, the Pardot data fields appear only in the record that Pardot is syncing with.

Considerations for Accounts That Allow Multiple Prospects with the Same Email Address

The most important aspect of the Salesforce sync is creating a one-to-one relationship between a Pardot prospect and a Salesforce lead, contact, or person account. The Salesforce connector uses CRM ID as the matching criteria for syncing in both directions in accounts that allow multiple prospects with the same email address.

When Salesforce creates a lead, contact, or person account with a specific email address, a prospect is created in Pardot with a matching CRM ID. Data from each record syncs according to the sync behavior defined for each field. Prospects are created in Pardot only if the Salesforce connector user has permission to the record in Salesforce.

If a prospect doesn't have a CRM ID and multiple records with the same email address exist in Salesforce, the prospect syncs to the record with the most recent activity.

When a prospect is created in Pardot and it meets your criteria to begin syncing, it creates a record in Salesforce following your connector's settings.

Accounts that allow multiple prospects with the same email address have fewer connector settings. The connector creates prospects when it finds new leads, contacts, or person accounts and syncs changes among those records. When it detects merged or deleted records in Salesforce, it updates the corresponding Pardot prospects and sends deleted records to the Pardot recycle bin.

Step 1: Install the Salesforce-Pardot Connector (Connector v1)

After you install the Pardot package, make sure that your connector user has the appropriate permissions. Then create the connector in Pardot. This process applies only to version 1 of the Salesforce-Pardot connector.

[Install the Pardot AppExchange Application](#)

Before setting up your Salesforce connector in Pardot, install the Pardot AppExchange package in your Salesforce org.

[Assign the Pardot Connector User Permission Set](#)

After the Pardot package is installed in your Salesforce org, you grant the connector user the Pardot Connector User permission set.

[Assign Object Permissions to the Connector User](#)


Because of Salesforce security restrictions, an admin must manually configure your connector user's permissions for Salesforce standard objects. These objects aren't covered by the Pardot Connector User permission set. This step applies only to accounts with Salesforce-Pardot connector v1, or accounts using Marketing Data Sharing.

[Add the Salesforce-Pardot Connector in Pardot \(Connector v1\)](#)

A Pardot admin can create and configure the connector in Pardot. This process applies only to version 1 of the Salesforce-Pardot connector.

Install the Pardot AppExchange Application

Before setting up your Salesforce connector in Pardot, install the Pardot AppExchange package in your Salesforce org.

 **Important:** Do not install the package directly from AppExchange. You must install the package as described here.


1. Get the [installation link](#).

This package updates your Salesforce account with a custom application, custom tab, and custom fields under leads and contacts. You might need to modify your view to display the fields.

2. Review actions, and click **Install**.
3. On Step 2 of the install wizard (Choose security level), select **Grant access to admins only**.

Assign the Pardot Connector User Permission Set

After the Pardot package is installed in your Salesforce org, you grant the connector user the Pardot Connector User permission set.

 **Note:** Apply the Pardot Connector User permission set only to your Pardot connector user. Don't assign the Engage permission set from this page. The Engage permission is assigned from the licensing page.


Before you begin, make sure that the connector user has these permissions:

- API Enabled
- Manage Profiles and Permission Sets
- View All Users
- View Setup and Configuration

1. From Marketing Setup, enter *users* in the Quick Find box, then select **Users**.
2. Select the connector user.
3. Scroll to Permission Set Assignments, and click **Edit Assignments**.
4. In the Available Permission Sets box, click **Pardot Connector User** to highlight it, then click the **Add** arrow button.
5. Save the user.

Assign Object Permissions to the Connector User

Because of Salesforce security restrictions, an admin must manually configure your connector user's permissions for Salesforce standard objects. These objects aren't covered by the Pardot Connector User permission set. This step applies only to accounts with Salesforce-Pardot connector v1, or accounts using Marketing Data Sharing.

 **Note:** How you apply these permissions is up to you. For more information about permissions, see the [User Permissions documentation](#).

The Pardot Connector user should have these permissions for these standard objects.

USER PERMISSIONS

To install the Pardot package:

- Download AppExchange Packages (in Salesforce)

USER PERMISSIONS


To assign permission sets:

- Assign Permission Sets (in Salesforce)

To edit object permissions:

- Manage Profiles and Permission Sets
AND
Customize Application (in Salesforce)

Object Name	Object Permissions	Field Permissions
Accounts	View All	All standard and custom fields syncing with Pardot
Campaigns	Create/Edit/Read/View All	All standard and custom fields syncing with Pardot
CampaignMember	Create/Read/Edit	All standard and custom fields syncing with Pardot
Contacts	Create/Edit/Read/View All/Modify All	All standard and custom fields syncing with Pardot
Leads	Create/Edit/Read/View All/Modify All	All standard and custom fields syncing with Pardot
ObjectChangeLogs	View All/Modify All	All
Opportunity	View All	All standard and custom fields syncing with Pardot
Task	Edit Tasks	All standard and custom fields syncing with Pardot
Users	View All Users	All standard and custom fields syncing with Pardot

 **Note:** Pardot recommends that your connector user also has the View Setup and Configuration permission. This permission makes it possible for support to troubleshoot issues with the connector.

Add the Salesforce-Pardot Connector in Pardot (Connector v1)

A Pardot admin can create and configure the connector in Pardot. This process applies only to version 1 of the Salesforce-Pardot connector.

1. Open the Connectors page.
 - In Pardot, select **Admin** and then **Connectors**.
 - In the Lightning app, select **Pardot Settings**, and then **Connectors**.
2. Click **+ Add Connector**.
3. Click **Salesforce**.
4. Click **Create Connector**.
5. Log in to Salesforce using the connector user's credentials.
6. After you're logged in, click **Allow** to give the connector user access to your account.
7. Choose your connector settings.
8. Click **Finish**.

When Pardot can send and receive data to and from Salesforce, the connector is marked as verified.

USER PERMISSIONS

To add the Salesforce connector in Pardot:

- Pardot Administrator role

Step 2: Configure Salesforce for the Salesforce-Pardot Connector

During configuration, a Salesforce admin can map custom fields, add Pardot components to page layouts, and grant Pardot data access to users.

[Map Pardot Custom Lead Fields to Contact Fields](#)

Mapping fields in Salesforce ensures that the contact record pulls in all Pardot data from the lead record during conversion.

[Show Pardot Data in Salesforce](#)

The AppExchange application adds Pardot fields and Visualforce pages, but they're not displayed. To display the Pardot fields and Visualforce pages in Salesforce, add them to your Salesforce lead and contact page layouts.

[Add Custom Pardot Buttons to Salesforce Page Layouts](#)

The Send to Pardot button makes it easy to add Salesforce leads or contacts to Pardot. If a corresponding record exists, the button syncs the records instead of creating a prospect. The Send Pardot Email button lets Salesforce users who are assigned the Pardot permission set to send a Pardot-tracked email from Salesforce.

[Adding Pardot Standard Actions to Salesforce](#)

Add Pardot buttons and actions to Salesforce as standard actions in list views and on certain record pages. Quick action record buttons are only supported in production orgs, not in Salesforce sandboxes.

[Add Scoring Category Scores to Page Layouts](#)


If your Pardot account uses scoring categories, you can add the scores to your lead and contact page layouts.

[Give Users Access to Pardot Data in Salesforce](#)

Apply the Pardot permission set that is included with the AppExchange package to any user who accesses or uses Pardot data in Salesforce.

Map Pardot Custom Lead Fields to Contact Fields

Mapping fields in Salesforce ensures that the contact record pulls in all Pardot data from the lead record during conversion.

 **Important:** Do not map the Pardot URL lead field and Pardot URL contact field. Mapping these fields to each other creates duplicate prospects and breaks Visualforce pages.

1. Navigate to the object management settings for leads.
2. In the Lead Custom Fields & Relationships section, click **Map Lead Fields**.
3. Click the **Contact** tab, and map the fields.
4. Save when finished.

USER PERMISSIONS

To map lead fields:

- Customize Application (in Salesforce)

Show Pardot Data in Salesforce

The AppExchange application adds Pardot fields and Visualforce pages, but they're not displayed. To display the Pardot fields and Visualforce pages in Salesforce, add them to your Salesforce lead and contact page layouts.

1. Open your lead or contact page layout for editing.
2. Add the Pardot custom fields to the page layout.
 - a. Add a section to the layout.

USER PERMISSIONS

To customize page layouts:

- Customize Application (in Salesforce)

Action	Availability in Salesforce
Add to Pardot List	Object Page Layouts <ul style="list-style-type: none">• Lead• Contact List View Objects <ul style="list-style-type: none">• Lead• Contact
Add to Engagement Studio List	Object Page Layouts <ul style="list-style-type: none">• Lead• Contact List View Objects <ul style="list-style-type: none">• Lead• Contact

Add Scoring Category Scores to Page Layouts

If your Pardot account uses scoring categories, you can add the scores to your lead and contact page layouts.

1. Open your lead or contact page layout for editing.
2. In the editor, click **Related Lists**.
3. Drag **Pardot Category Score** to the layout.
4. (Optional) Edit the Pardot Category Score properties to include only Scoring Category Name, Score, and Last Modified Date, and sort descending by score.

EDITIONS

Available in: Pardot **Plus**, **Advanced**, and **Premium** Editions


USER PERMISSIONS

To customize page layouts:

- Customize Application (in Salesforce)

Give Users Access to Pardot Data in Salesforce

Apply the Pardot permission set that is included with the AppExchange package to any user who accesses or uses Pardot data in Salesforce.

 **Note:** Don't assign the Engage permission set from this page. The Engage permission is assigned from the licensing page.

1. From Marketing Setup, enter *Permission Sets* in the Quick Find box, then select **Permission Sets**.
2. Click **Pardot**.
3. Click **Manage Assignments**.
4. Click **Add Assignments**.
5. Select the users that you want to assign the permission set to.

USER PERMISSIONS

To assign permission sets:

- Assign Permission Sets (in Salesforce)

6. Click **Assign**.

Step 3: Configure Pardot

A Pardot admin can map custom fields and users, test the connector, and perform an initial prospect sync.

[Map Salesforce and Pardot Custom Fields](#)

A Pardot admin can map prospect and account custom fields so that they can sync between Pardot and Salesforce.

[Test the Salesforce-Pardot Connector](#)

After you set up the Salesforce-Pardot connector, you can test to make sure that the connector is syncing as expected.

[Trigger the Initial Prospect Sync](#)

After you've connected Salesforce and Pardot, import your existing leads and contacts into Pardot. The connector doesn't automatically create prospects in Pardot from existing Salesforce leads and contacts. Upon import, Pardot syncs the prospect record with the existing Salesforce lead or contact record. Future updates to records in either system then sync automatically.

Map Salesforce and Pardot Custom Fields

A Pardot admin can map prospect and account custom fields so that they can sync between Pardot and Salesforce.



Note: Before you can map Pardot and Salesforce custom fields, you must create the corresponding custom field in Pardot.

Keep these considerations in mind when mapping fields.

- If a Salesforce field is already mapped to a Pardot field, it doesn't display in the dropdown.
 - Custom field mapping is case sensitive.
 - To map a custom field on both the lead object and contact object to the same Pardot field, the API name of the Salesforce fields must be identical.
 - Pardot fields don't sync with lookup or geolocation Salesforce field types.
 - Don't map Pardot number type fields to Salesforce phone type fields. Phone fields contain non-number characters and don't sync to Pardot correctly. Instead, map Salesforce phone type fields to Pardot text type fields.
1. In Pardot, open the custom field for editing.
 2. From the Salesforce Field Name dropdown, choose the field you want to map.
 3. (Optional) Enable **Keep this field's type and possible values (for dropdowns, radio buttons, checkboxes) in sync with the CRM**. This setting syncs field setting changes from Salesforce to Pardot.
 4. (Optional) Edit sync behavior.

Repeat these steps for each custom field you want to sync.



Note: Mapping a Pardot custom field with a Salesforce field does not trigger a sync with the CRM.

USER PERMISSIONS

To map fields:

- Pardot Administrator role

Test the Salesforce-Pardot Connector

After you set up the Salesforce-Pardot connector, you can test to make sure that the connector is syncing as expected.

Test Accounts That Don't Allow Multiple Prospects with the Same Email Address


1. New Pardot prospect with an existing salesforce record—Create a prospect record in Pardot that exists in your CRM. To check whether the record syncs, click **Sync with CRM**, or wait 10–15 minutes to see if the connector initiates the sync.
2. New Pardot prospect with a new Salesforce record—Create a prospect record in Pardot with an email address of a Salesforce record that doesn't exist. Add a record in Salesforce with the same email address. To check whether the record syncs, click **Sync with CRM**, or wait 10–15 minutes to see if the connector initiates the sync.
3. Assign prospects in Pardot—Create a prospect in Pardot with an email address that doesn't exist in Salesforce, and assign the prospect to a user. Check to see whether a record is created in Salesforce.
4. Automatic prospect creation from new CRM record—If your connector is set up to create prospects in Pardot when a record is added in Salesforce, create a Salesforce record with an email address that doesn't exist in Pardot. Check whether Pardot has the new record.

Test in Accounts That Allow Multiple Prospects with the Same Email Address

1. Assign prospects in Pardot—Create a prospect in Pardot, and assign the prospect to a user. Check to see whether the record is created in Salesforce.
2. Create a record in Salesforce—Create a Salesforce record. Wait for the record to sync, or manually sync by clicking **Send to Pardot**. Check to see whether the record is created in Pardot.

Trigger the Initial Prospect Sync

After you've connected Salesforce and Pardot, import your existing leads and contacts into Pardot. The connector doesn't automatically create prospects in Pardot from existing Salesforce leads and contacts. Upon import, Pardot syncs the prospect record with the existing Salesforce lead or contact record. Future updates to records in either system then sync automatically.

-  **Note:** If your account allows multiple prospects with the same email address, you must import by CRM ID to match leads and contacts with prospects. If you do not import by CRM ID, prospects imported by email address create duplicate leads or contacts in Salesforce. New Pardot accounts allow multiple prospects with the same email address by default.