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# B2B Marketing Analytics Implementation Guide

Salesforce, Winter '23

'23





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# SET UP B2B MARKETING ANALYTICS

B2B Marketing Analytics is a CRM Analytics app that segments and visualizes your marketing and sales data. After you assign user permissions, marketers can create B2B Marketing Analytics dashboards in CRM Analytics Studio.

Before you begin, you must have a verified Salesforce-Pardot connector. See [Setting Up a Salesforce-Pardot Connector for Accounts Purchased After February 11, 2019](#) or [Setting Up a Salesforce-Pardot Connector for Accounts Purchased Before February 11, 2019](#).

## [B2B Marketing Analytics Dashboards](#)

The B2B Marketing Analytics app template offers three dashboards of charts and tables to explore. With a few more steps, you can also create a Multi-Touch Attribution dashboard, Account-Based Marketing dashboard, or an Einstein Behavior Scoring dashboard. Each dashboard is built on predetermined datasets and filters, or lenses, that help you draw insights from your marketing data.

## [Prerequisites for B2B Marketing Analytics](#)

The setup process for B2B Marketing Analytics varies based on when the feature was purchased or previously set up. Your permission set license affects how you enable B2B Marketing Analytics. To get the newest tools and data after the initial setup, users must update their apps periodically.

## [Considerations for B2B Marketing Analytics](#)

Keep these considerations in mind while you set up and use B2B Marketing Analytics.

## [Create and Upgrade B2B Marketing Analytics Apps](#)

To explore dashboards and lenses, create an app with the B2B Marketing Analytics template. As feature updates become available to B2B Marketing Analytics, you must upgrade your apps. You can also change an app's settings at any time by reconfiguring it.

## [Optional Uses for B2B Marketing Analytics](#)

Your business goals dictate how you set up each B2B Marketing Analytics app. For example, track opportunities at each touchpoint or dig into engagement on a specific account. Optional dashboards are available with B2B Marketing Analytics.

## [B2B Marketing Analytics Glossary](#)

Familiarize yourself with common CRM Analytics terminology.

## B2B Marketing Analytics Dashboards

The B2B Marketing Analytics app template offers three dashboards of charts and tables to explore. With a few more steps, you can also create a Multi-Touch Attribution dashboard, Account-Based Marketing dashboard, or an Einstein Behavior Scoring dashboard. Each dashboard is built on predetermined datasets and filters, or lenses, that help you draw insights from your marketing data.

### Engagement

This dashboard shows how your primary marketing assets perform and how they contribute to the sales pipeline and opportunity lifecycle.

Included metrics: asset engagement on list emails, forms, and landing pages.

### Pipeline

The Pipeline dashboard shows your sales funnel from visitors to prospects and through to opportunities you've won. This dashboard is helpful for sales and marketing leadership to see which assets and campaigns push the most deals.

### EDITIONS

Available in: Pardot **Plus**, **Advanced**, and **Premium** Editions with Salesforce **Enterprise** Edition or higher

Available for additional cost in legacy Pardot **Pro** or **Ultimate** Editions with Salesforce **Enterprise** Edition or higher

Included metrics: numbers of visitors, prospects, marketing qualified leads, open opportunities, closed-won opportunities, and velocity figures.

### Marketing Manager

The Marketing Manager dashboard offers a quick look into the health of your business and which campaigns are yielding the best results. From this dashboard, you can drill into the Engagement and Pipeline dashboards.

Included metrics: pipeline deals, revenue by campaign, and marketing asset engagement.

### Multi-Touch Attribution

The Multi-Touch Attribution dashboard shows the top drivers at each lifecycle stage. Get a detailed view of marketing performance when you filter the dashboard by influence model, opportunity, account, and more.

Included metrics: revenue, total value, cost, ROI, top channels, and revenue by campaign.

### Account-Based Marketing

The Account-Based Marketing dashboard brings together opportunities, contacts, marketing engagement, and sales activities. Narrow the dashboard by a certain account or a few, to find out how things are going with your sales reps.

Included metrics: pipeline value, number of opportunities, Pardot score, won/lost percentage, stage value, and a table of opportunities.

### Einstein Behavior Scoring

The Einstein Behavior Scoring dashboard gives the factors that Einstein uses to build your scoring model.

Included widgets: Most influential engagement activities, influential assets, and a table of leads and contacts who perform these activities.

## Prerequisites for B2B Marketing Analytics

The setup process for B2B Marketing Analytics varies based on when the feature was purchased or previously set up. Your permission set license affects how you enable B2B Marketing Analytics. To get the newest tools and data after the initial setup, users must update their apps periodically.

 **Note:** Here's how to find out which B2B Marketing Analytics version and Salesforce connector version your org uses.

- To find out which license you're using, head over to Salesforce Setup. Open Company Information, and look for the Permission Set License field.
- To find your connector version, open Pardot Settings. Under Account Information, find the Salesforce Connector Version field.

This information can help you determine which permissions your B2B Marketing Analytics users need.

### User Permissions

If you have the B2B Marketing Analytics permission set license, the permissions you need are already available in your org.

If you have the Analytics Embedded App permission set license, you must create custom permission sets. To give managers and users access to apps, make two permission sets and name them Manage CRM Analytics Templated Apps and Use CRM Analytics Templated Apps.

- Base each permission set on the Analytics Embedded Apps permission set license.

### EDITIONS

Available in: Pardot **Plus**, **Advanced**, and **Premium** Editions with Salesforce **Enterprise** Edition or higher

Available for an extra cost in legacy Pardot **Pro** and **Ultimate** Editions with Salesforce **Enterprise** Edition or higher


### USER PERMISSIONS

To enable CRM Analytics platform:

- Customize Application

To create permission sets:

- Manage Profiles AND Permission Sets

- For the Manage permission set, allow all the available permissions and add the Create B2B Marketing Analytics Apps and Manage CRM Analytics Templated Apps user permissions. Then, assign the Manage permission set to the integration user (or connector user) and other power users.
  - For the Use permission set, allow the permissions that you want a typical user to have. Add the Create B2B Marketing Analytics Apps and Use CRM Analytics Templated Apps user permissions. Then, assign the Use permission set to users who need access to B2B Marketing Analytics dashboards and apps.
-  **Important:** Make sure that your connector user (either Connector User or Integration User) retains the necessary permissions at all times. If you unassign the connector user's permissions, B2B Marketing Analytics apps stop updating. Additional licenses are available with CRM Analytics Platform licenses, if more users need access.

### App Updates

If it's your first time setting up B2B Marketing Analytics, follow the setup steps and then tell users they can create their own apps in Analytics Studio.

If your org already contains B2B Marketing Analytics apps, make sure you're using the latest version. For information about legacy B2B Marketing Analytics, check out [Migration for Legacy Users](#) on page 8.

When changes are made to the B2B Marketing Analytics product, users must update each of their apps. A notification appears in the toolbar. [Upgrade a B2B Marketing Analytics Template](#) on page 15

### Multi-Touch Attribution Dashboard

If you want to use the optional Multi-Touch Attribution dashboard, set up [Customizable Campaign Influence](#) first.

#### [Set Up B2B Marketing Analytics](#)

Review the prerequisites and permissions details for B2B Marketing Analytics, and then enable the feature in the Marketing Setup app.

#### [Permissions for B2B Marketing Analytics](#)


Create and assign permission sets for the connector user and B2B Marketing Analytics users. The app version that you use determines which permission names are available.

#### [Migration for Legacy Users](#)

Datasets in legacy B2B Marketing Analytics apps are longer updated. Legacy apps include any custom apps that you made without selecting the B2B Marketing Analytics app template during setup. To get access to the most recent features and data, upgrade to templated apps.

## Set Up B2B Marketing Analytics


Review the prerequisites and permissions details for B2B Marketing Analytics, and then enable the feature in the Marketing Setup app.


-  **Note:** Tableau CRM is now known as [CRM Analytics](#). We wish we could snap our fingers to update the name everywhere, but you can expect to see the previous name in a few places until we replace it.

For new users to B2B Marketing Analytics, here's the fastest way to get started.

1. From Marketing Setup, select **B2B Marketing Analytics**, and then click **Getting Started**.
2. Expand each section to complete each task.
  - a. Share Pardot Data: Click **Manage Assignments**, and then add the Integration user to the selected permission set. Then, add the sales and marketing users who need access to B2B Marketing Analytics apps.
  - b. Enable CRM Analytics: Click **Open CRM Analytics Setup**, and then enable CRM Analytics. If the Data Rows heading and Setup tiles appear, it's enabled.
  - c. Enable Data Sync and Connections: Click **Open CRM Analytics Settings**, select **Enable Data Sync and Connections**, and then save.
3. [Schedule replication](#).
4. After settings and permission sets are in place, you or your users can open Analytics Studio and begin creating apps.

To set up optional datasets and dashboards, select **Optional Features** in Marketing Setup.

-  **Tip:** By default, archived prospect data is included in CRM Analytics datasets. To exclude data from archived prospects in the pdProspects and odProspectActivity datasets, edit the preference in Pardot Settings.

-  **Note:** The Data Sync and Connections setting is recommended for most users because it improves performance in CRM Analytics.
  - When Data Sync is on, you must schedule replication to get the latest data.
  - If you have any CRM Analytics apps besides B2B Marketing Analytics, Data Sync can retain other apps' filters and show inaccurate data in B2B Marketing Analytics.

## Permissions for B2B Marketing Analytics

Create and assign permission sets for the connector user and B2B Marketing Analytics users. The app version that you use determines which permission names are available.

Here's how to find out which B2B Marketing Analytics version and Salesforce connector version your org uses.

- To find out which license you're using, head over to Salesforce Setup. Open Company Information, and look for the Permission Set License field.
- To find your connector version, open Pardot Settings. Under Account Information, find the Salesforce Connector Version field.

This information can help you determine which permissions your B2B Marketing Analytics users need.

### EDITIONS

Available in: Pardot **Plus**, **Advanced**, and **Premium** Editions with Salesforce **Enterprise** Edition or higher

Available for an extra cost in legacy Pardot **Pro** and **Ultimate** Editions with Salesforce **Enterprise** Edition or higher

### USER PERMISSIONS

To assign permission sets:

- Assign Permission Sets  
AND  
View Setup and Configuration

To create B2B Marketing Analytics apps:

- Manage CRM Analytics Templated Apps  
AND  
Create B2B Marketing Analytics Apps OR B2B Marketing Analytics App permission set

### USER PERMISSIONS

To select who can use B2B Marketing Analytics:

- Customize Application  
AND Modify All Data



If your org uses the Analytics Embedded App permission set license, refer to [Migration for Legacy Users](#) on page 8.

 **Note:** Each B2B Marketing Analytics subscription provides five users.

## Connector User

The connector user is used in orgs with the v1 Salesforce connector. The connector user must retain access to the following permissions at all times. If you reassign the connector user for other purposes, B2B Marketing Analytics can't receive updated data.

### Permission Set Licenses

- B2B Marketing Analytics
- CRM User OR Sales User OR Service User

### Permission Sets

- Pardot Connector User
- CRM User OR Sales Cloud User OR Service Cloud User
- B2B Marketing Analytics App

### System Permissions

The B2B Marketing Analytics App permission set includes these system permissions by default.

- Create B2B Marketing Analytics Apps
- Download CRM Analytics Data
- Edit CRM Analytics Dataflows
- Manage CRM Analytics Templated Apps
- Use CRM Analytics Templated Apps

## Integration User

The integration user is found in orgs with the v2 Salesforce connector. The integration user must retain access to the following permissions at all times. If you reassign the integration user for other purposes, B2B Marketing Analytics can't receive updated data.

### Permission Set Licenses

- B2B Marketing Analytics

### Permission Sets

- Pardot Integration User
- B2B Marketing Analytics App

### System Permissions

Make sure that the B2B Marketing Analytics App permission set includes these system permissions.

- Create B2B Marketing Analytics Apps
- Download CRM Analytics Data
- Edit CRM Analytics Dataflows
- Manage CRM Analytics Templated Apps
- Use CRM Analytics Templated Apps

## Manage Analytics User

### Permission Set Licenses

- B2B Marketing Analytics
- Account Engagement OR CRM User OR Sales User OR Service User

### Permission Sets

- Account Engagement User OR CRM User OR Sales Cloud User OR Service Cloud User
- B2B Marketing Analytics App

### System Permissions

Make sure that the B2B Marketing Analytics App permission set includes these system permissions.

- Create B2B Marketing Analytics Apps
- Download CRM Analytics Data
- Edit CRM Analytics Dataflows
- Manage CRM Analytics Templated Apps
- Use CRM Analytics Templated Apps

## Use Analytics User

Use a custom permission set to create use-only users. We recommend that you clone the original B2B Marketing Analytics permission set and remove unnecessary system permissions.

### Permission Set Licenses

- B2B Marketing Analytics
- Account Engagement OR CRM User OR Sales User OR Service User

### Permission Sets

- Account Engagement User OR CRM User OR Sales Cloud User OR Service Cloud User
- B2B Marketing Analytics App

### System Permissions

Make sure that the cloned B2B Marketing Analytics permission set includes these system permissions.


- B2B Marketing Analytics Apps
- Use CRM Analytics Templated Apps

### [Create Permission Sets](#)

You can clone a permission set or create a new one. A cloned permission set starts with the same licenses and enabled permissions as the original one. A new permission set starts with no licenses selected and no permissions enabled.

## Create Permission Sets

You can clone a permission set or create a new one. A cloned permission set starts with the same licenses and enabled permissions as the original one. A new permission set starts with no licenses selected and no permissions enabled.


 **Tip:** If your org has many permission sets, using permission set groups can help improve performance.

1. From Setup, enter *Permission Sets* in the Quick Find box, then select **Permission Sets**.
2. Click **New**.
3. Enter your permission set information.
4. Select the types of users for the permission set.

When you create a permission set, you select a specific user or permission set license. If only users with one type of license can use the permission set, select the license that's associated with the users. For example, to create a permission set for users with

- the Salesforce license, select **Salesforce**. You can enable permissions only allowed in the Salesforce license.
- the Identity Connect permission set license, select **Identity Connect**. You can enable permissions only allowed in the Identity Connect license.
- different licenses, select **None**. Not selecting a specific license allows you to assign the permission set to any user whose license allows the permissions you enable in the permission set. For example, to assign the permission set to users with the Salesforce license and to users with the Salesforce Platform license, select **None**.

When creating a permission set for a specific permission set license, refer to that feature's documentation. For example, to create a permission set for the Identity Connect permission set license, use these steps along with the Identity Connect documentation.

 **Example:** Let's say you have several users with a profile called Sales User. This profile allows assignees to read, create, and edit leads. But you need some users to also delete and transfer leads. On the permission set page that you create, go to Find Settings and begin typing *Lead*. Under Object Settings, select **Leads** and enable delete. "Transfer Leads" is an app permission (rather than object permission). To enable it, in Find Settings, begin typing *Leads*. "Transfer Leads" is listed under App Permissions. Assign the permission set to users who need these permissions.

 **Note:**

- Permission sets with no license selected don't include all possible permissions and settings.
- Assign a permission set with no license only to users whose user licenses allow the permissions and settings that you are enabling in the permission set. For example, don't create a permission set with no user license and then enable "Author Apex" and assign it to Salesforce Platform users. You can't assign this permission set to Salesforce Platform users because the Salesforce Platform user license doesn't allow Apex authoring.

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

### USER PERMISSIONS

To create permission sets:

- "Manage Profiles and Permission Sets"

To assign permission sets:

- "Assign Permission Sets"

## Migration for Legacy Users

Datasets in legacy B2B Marketing Analytics apps are longer updated. Legacy apps include any custom apps that you made without selecting the B2B Marketing Analytics app template during setup. To get access to the most recent features and data, upgrade to templated apps.

Migration steps vary depending on when you purchased B2B Marketing Analytics and whether you enabled a recent version. Review these setup descriptions to identify which steps to take.

If you choose to migrate your app's customizations, learn what to do before and after.

- [Before You Upgrade](#)
- [After Your Upgrade](#)

## Set Up for Legacy Add-On Users

### I purchased B2B Marketing Analytics as an add-on, and I didn't migrate to the app template.

Migrate your legacy apps to the latest version of B2B Marketing Analytics. The permission set license in your account is called Analytics Embedded App.

1. Review the prerequisite settings.
2. Create the Manage CRM Analytics Templated Apps permission set, and assign it to the connector user.
3. Create the Use CRM Analytics Templated Apps perm set, and assign it to sales and marketing users.
4. Save custom lenses, datasets, or dashboards to the My Shared Apps or My Private Apps folder.
5. Create an app.

#### [Permissions for the Analytics Embedded App License](#)

The app version that you use determines which permissions are available. After you determine which Salesforce permission set license you have, assign the other permission sets and system permissions to different types of users.

## Permissions for the Analytics Embedded App License

The app version that you use determines which permissions are available. After you determine which Salesforce permission set license you have, assign the other permission sets and system permissions to different types of users.

Here's how to find out which B2B Marketing Analytics version and Salesforce connector version your org uses.

- To find out which license you're using, head over to Salesforce Setup. Open Company Information, and look for the Permission Set License field.
- To find your connector version, open Pardot Settings. Under Account Information, find the Salesforce Connector Version field.

This information can help you determine which permissions your B2B Marketing Analytics users need.

If you have the Analytics Embedded Apps permission set license, refer to the following list of permissions.

-  **Note:** System labels have been updated to reflect branding changes. Some older labels continue to include Pardot, Analytics, or Tableau CRM.

### EDITIONS

Available in: Pardot **Plus**, **Advanced**, and **Premium** Editions with Salesforce **Enterprise** Edition or higher

Available for an extra cost in legacy Pardot **Pro** and **Ultimate** Editions with Salesforce **Enterprise** Edition or higher

### EDITIONS

Available in: Pardot **Plus**, **Advanced**, and **Premium** Editions with Salesforce **Enterprise** Edition or higher

Available for an extra cost in legacy Pardot **Pro** and **Ultimate** Editions with Salesforce **Enterprise** Edition or higher

## Connector User, Integration User, and Manage Analytics Users

### Permission Set Licenses

- Analytics Embedded App
- CRM User OR Sales User OR Service User

### Permission Sets

- Pardot Connector User (for v1 connector) OR Pardot Integration User (for v2 connector)
- CRM User OR Sales Cloud User OR Service Cloud User
- Manage Templated Analytics Apps (custom) or Manage Templated CRM Analytics Apps (custom)

### System Permissions

Make sure that the permission set you create to manage templated apps includes these system permissions.

- Create and Edit CRM Analytics Dashboard
- Create B2B Marketing Analytics Apps
- Download CRM Analytics Data
- Edit CRM Analytics Dataflows
- Edit Dataset Recipes
- Manage CRM Analytics Templated Apps
- Upload External Data to CRM Analytics
- Use CRM Analytics
- Use CRM Analytics Templated Apps

## Use Analytics Salesforce User

### Permission Set Licenses

- Analytics Embedded App
- CRM User OR Sales User OR Service User

### Permission Sets

- Pardot Connector User (for v1 connector) OR Pardot Integration User (for v2 connector)
- CRM User OR Sales Cloud User OR Service Cloud User
- Use Templated Analytics Apps (custom) OR Manage Templated CRM Analytics Apps (custom)

### System Permissions

Make sure that the permission set you create to use templated apps includes these system permissions.

- Create B2B Marketing Analytics Apps
- Use CRM Analytics
- Use CRM Analytics Templated Apps

## Considerations for B2B Marketing Analytics

Keep these considerations in mind while you set up and use B2B Marketing Analytics.

### Setting Up B2B Marketing Analytics

- The Multi-Touch Attribution Dashboard, Account-Based Dashboard, Einstein Behavior Scoring dashboard, and Prospect and Activity dataset are optional.
- We don't recommend using B2B Marketing Analytics in sandbox orgs. To test dashboards, create a private app to configure and explore. Then, share the app with colleagues.
- The necessary permission sets provide Editor access for B2B Marketing Analytics apps to every user. To restrict this ability, you can update the sharing settings. To keep data flowing as expected, make sure that the connector or integration user retains Editor access.
- If you assigned all of your available licenses, the CRM Analytics Platform license can share access with additional sales and marketing users.

#### EDITIONS

Available in: Pardot **Plus**, **Advanced**, and **Premium** Editions with Salesforce **Enterprise** Edition or higher

Available for an extra cost in legacy Pardot **Pro** and **Ultimate** Editions with Salesforce **Enterprise** Edition or higher

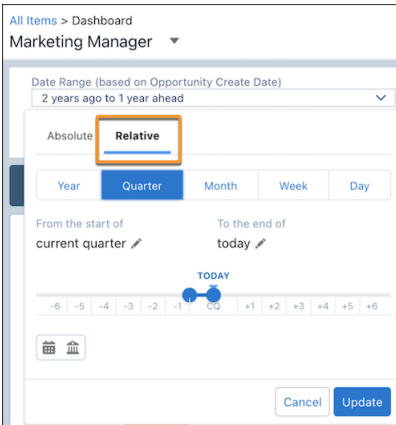
### Updating the App Template

- B2B Marketing Analytics is built on a CRM Analytics app template, which is updated a few times per year. An admin can enable the feature, but users must install and upgrade their apps as needed.
- Each time users upgrade to the latest app, they can overwrite the existing app or create one. When users overwrite an app, they lose custom dashboards and settings. Make a note of which dashboards, datasets, and lenses use any standard Pardot elements.
- To migrate customizations, move dashboards, datasets, and saved lenses into My Shared App or My Private App. Next, upgrade the app and edit the existing queries to reference the new dataset IDs. Confirm that important assets and customizations are available in the new app.
- Choose whether to keep older versions of apps for reference or delete them. When a new app is available, the previous version is no longer updated or supported.

### Using Multiple Business Units

You can use B2B Marketing Analytics apps with multiple business units, but individual dashboards behave differently.

- Create an app for each business unit that you want to work with by entering the Pardot business unit ID when you set up the app. Available data is then limited to that business unit in the Engagement, Pipeline, Marketing Manager, and Einstein Behavior Scoring dashboards.
- Multi-Touch Attribution (MTA) and Account-Based Marketing (ABM) dashboards show all available Pardot data, regardless of the app's associated business unit.
- To filter MTA or ABM dashboards, build a lens from available fields in the datasets.
- Marketing Data Sharing and row-level settings don't affect the data shown in B2B Marketing Analytics dashboards.
- For best results when filtering a dashboard by date, we recommend that you use the Relative date mode.



The Data Sync and Connections setting is recommended for most users because it improves performance in CRM Analytics.

- When Data Sync is on, you must schedule replication to get the latest data.
- If you have any CRM Analytics apps besides B2B Marketing Analytics, Data Sync can retain other apps' filters and show inaccurate data in B2B Marketing Analytics.

## Using B2B Marketing Analytics

- 📌 **Note:** As of the Summer '20 release, datasets in legacy B2B Marketing Analytics apps are no longer updated. Legacy apps include any custom apps that you created without selecting the B2B Marketing Analytics app template during setup. For the latest datasets and features, re-create your apps with the B2B Marketing Analytics app template.
- B2B Marketing Analytics uses the currency setting from your Pardot business unit. Regardless of locale settings, currency formats in CRM Analytics apps support only decimals for the decimal separator and commas for the grouping separator.
- The Multi-Touch Attribution dashboard includes a filter for campaign influence models. The filter list contains only models that have campaigns and opportunities associated with them. The list can be empty for newer users.
- In orgs with Engagement History enabled, Analytics Studio contains a read-only Engagement History app. Users can work with lenses to explore the dataset: 90 days of engagement data from connected campaigns and synced assets. This app powers the Engagement History Dashboard Lightning component.
- B2B Marketing Analytics isn't fully supported on Lightning Experience on iPad Safari. Dashboards don't always appear completely inside Analytics Studio, so we recommend that you open the app from the Analytics tab in Lightning Experience. Alternatively, try the CRM Analytics mobile app for iOS.

## Working with Data

- B2B Marketing Analytics uses Bulk API calls to aggregate data in the datasets. This usage doesn't count against your Salesforce or Pardot API request limits.
- External datasets originate in Pardot and can't be edited in the Data Manager. They're updated every 24 hours and can't be synced manually. The external datasets are:
  - Pardot Campaign
  - Pardot Email
  - Pardot Email Template
  - Pardot Form and Form Handler

- Pardot Landing Page
  - Pardot Opportunity
  - Pardot Prospect
  - Pardot Tags
  - Pardot Visitor
- For other datasets, you can schedule sync to avoid overlap and improve performance. Learn how to [Schedule Data Sync to Run Automatically](#).
  - If you use B2B Marketing Analytics without embedded Engagement History dashboards enabled, you can sync up to 25 million rows of data.
  - For Pardot **Growth** Edition, Engagement History can sync up to 90 days or 50 million rows of data, whichever comes first. For Pardot **Plus, Advanced, and Premium** Editions where B2B Marketing Analytics and the Prospect and Activity dataset are enabled, these features can sync up to 3 years or 35 million rows in total.
  - Due to date filters, time zones, and other factors, you can encounter discrepancies between data in Pardot and B2B Marketing Analytics data. Find out more in this Knowledge Article: [Data Discrepancies in B2B Marketing Analytics](#).

## Create and Upgrade B2B Marketing Analytics Apps

To explore dashboards and lenses, create an app with the B2B Marketing Analytics template. As feature updates become available to B2B Marketing Analytics, you must upgrade your apps. You can also change an app's settings at any time by reconfiguring it.

### [Create a B2B Marketing Analytics App](#)

To create a B2B Marketing Analytics app in your org, navigate to Analytics Studio and answer the setup questions.

### [Reconfigure B2B Marketing Analytics](#)

If you make a mistake during setup or have new business needs, you can change the configuration of your B2B Marketing Analytics app at any time.

### [Upgrade a B2B Marketing Analytics Template](#)

Each time Salesforce releases new datasets and improvements to the B2B Marketing Analytics template, each user must update their B2B Marketing Analytics app. When an upgrade is available, a link to upgrade appears in the app header.

### EDITIONS

Available in: Pardot **Plus, Advanced, and Premium** Editions with Salesforce **Enterprise** Edition or higher

Available for an extra cost in legacy Pardot **Pro** and **Ultimate** Editions with Salesforce **Enterprise** Edition or higher

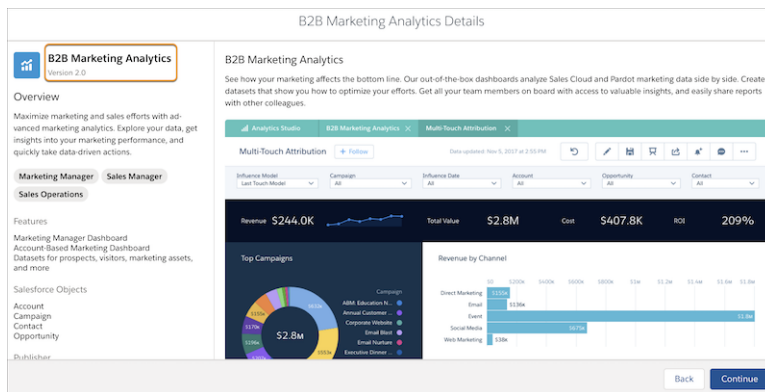


## Create a B2B Marketing Analytics App

To create a B2B Marketing Analytics app in your org, navigate to Analytics Studio and answer the setup questions.

1. In Salesforce, from the App Launcher (☰), find and open **Analytics Studio**.
2. Click **Create** and select **App**.
3. Click **Start from Template** and then select **B2B Marketing Analytics**.

The app called B2B Marketing Analytics Legacy is no longer supported. Click through to the Details page, and verify that Version 2.0 appears in the sidebar.



4. Click **Next** and continue through setup.
5. Click **Done**.

 **Note:** During the setup process, choose whether to include optional dashboards and datasets.

The setup process continues in the background. To see the status of your app, navigate to **Settings > Data Manager > Dataflow View** in Analytics Studio.

### USER PERMISSIONS

To create a B2B Marketing Analytics app:

- Manage CRM Analytics Templated Apps AND Create B2B Marketing Analytics Apps OR B2B Marketing Analytics permission set

To use B2B Marketing Analytics

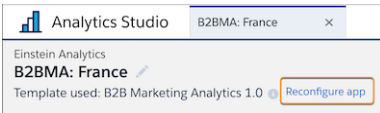
- Use CRM Analytics AND Create B2B Marketing Analytics Apps OR B2B Marketing Analytics permission set

## Reconfigure B2B Marketing Analytics

If you make a mistake during setup or have new business needs, you can change the configuration of your B2B Marketing Analytics app at any time.

**!** **Important:** This process overwrites custom dashboards. Before you reconfigure, [back up your app and save any dataset IDs](#).

1. Open your B2B Marketing Analytics app in Analytics Studio.
2. Click **Reconfigure app**.



To migrate customizations, move dashboards, datasets, and saved lenses into My Shared App or My Private App. Next, upgrade the app and edit the existing queries to reference the new dataset IDs. Confirm that important assets and customizations are available in the new app.

3. Work through the setup questions.
4. Click **Done**.

Check the update status at **Settings > Data Manager > Dataflow View** in Analytics Studio.

### EDITIONS

Available in: Pardot **Plus**, **Advanced**, and **Premium** Editions with Salesforce **Enterprise** Edition or higher

Available for an extra cost in legacy Pardot **Pro** and **Ultimate** Editions with Salesforce **Enterprise** Edition or higher

### USER PERMISSIONS

To reconfigure B2B Marketing Analytics:

- Manage CRM Analytics Templated Apps AND Create B2B Marketing Analytics Apps OR B2B Marketing Analytics permission set

## Upgrade a B2B Marketing Analytics Template

Each time Salesforce releases new datasets and improvements to the B2B Marketing Analytics template, each user must update their B2B Marketing Analytics app. When an upgrade is available, a link to upgrade appears in the app header.

1. Open your B2B Marketing Analytics app in Analytics Studio.
2. Click **Upgrade to new version**.

To migrate customizations, move dashboards, datasets, and saved lenses into My Shared App or My Private App. Next, upgrade the app and edit the existing queries to reference the new dataset IDs. Confirm that important assets and customizations are available in the new app.

3. Review the release notes provided, and continue through the setup questions.
4. Choose to overwrite your app or create one.

In Analytics Studio, check the update status at **Settings > Data Manager > Dataflow View**.

### EDITIONS

Available in: Pardot **Plus**, **Advanced**, and **Premium** Editions with Salesforce **Enterprise** Edition or higher

Available for an extra cost in legacy Pardot **Pro** and **Ultimate** Editions with Salesforce **Enterprise** Edition or higher

### USER PERMISSIONS

To upgrade B2B Marketing Analytics:

- Manage CRM Analytics Templated Apps AND Create B2B Marketing Analytics Apps OR B2B Marketing Analytics permission set

To use B2B Marketing Analytics:

- Use CRM Analytics Templated Apps AND Create B2B Marketing Analytics Apps OR B2B Marketing Analytics permission set

## Optional Uses for B2B Marketing Analytics

Your business goals dictate how you set up each B2B Marketing Analytics app. For example, track opportunities at each touchpoint or dig into engagement on a specific account. Optional dashboards are available with B2B Marketing Analytics.

### [Account-Based Marketing Dashboard](#)

Use Account-Based Marketing dashboards to understand how opportunities and contacts from one account engage with your marketing and sales assets. To use Account-Based Marketing dashboards, enable the integration user's access to B2B Marketing Analytics.

### [Multi-Touch Attribution Dashboard](#)

Multi-Touch Attribution dashboards show you which marketing efforts are most influential during each stage of the purchase lifecycle. After you enable Connected Campaigns, engagement with Pardot's marketing assets and data from Sales Cloud appear together in one dashboard.

### EDITIONS

Available in: Pardot **Plus**, **Advanced**, and **Premium** Editions with Salesforce **Enterprise** Edition or higher

Available for an extra cost in legacy Pardot **Pro** and **Ultimate** Editions with Salesforce **Enterprise** Edition or higher

### Prospect and Activity Dataset

To identify which content influences prospects in your sales funnel, add the optional Prospect and Activity dataset. Create a lens using this dataset to identify the individual prospect record that acted on a certain asset.

## Account-Based Marketing Dashboard

Use Account-Based Marketing dashboards to understand how opportunities and contacts from one account engage with your marketing and sales assets. To use Account-Based Marketing dashboards, enable the integration user's access to B2B Marketing Analytics.

### Dashboard Reference

B2B Marketing Analytics features optional account-based marketing offerings that come from three datasets: `pdAbmContact`, `pdAbmEvent`, and `pdAbmOpp`.

The Account-Based Marketing Dashboard can contain up to 10,000 accounts. If you have more, some accounts don't appear.

Metric Label	Description	Formula	Origin
Pipeline Value	Sum of monetary value associated with open opportunities	Sum of Amount values on open opportunities	ABM Opportunity dataset
Open Opportunities	Number of open opportunities associated with the selected accounts	Count of open opportunities with an Amount value of more than \$0	ABM Opportunity dataset
Contacts	Number of contacts associated with selected accounts	Count of contact records	ABM Contact dataset
Avg. Engagement Score	Average Pardot Score among all contacts	(Sum of Pardot Score values) / (Count of contacts)	ABM Contact dataset
Sales Events	Number of sales activities for the selected accounts	Count of sales activities	ABM Event dataset

### EDITIONS

Available in: Pardot **Plus**, **Advanced**, and **Premium** Editions with Salesforce **Enterprise** Edition or higher

Available for additional cost in legacy Pardot **Pro** or **Ultimate** Editions with Salesforce **Enterprise** Edition or higher

### Other Charts

#### Pipeline Value by Account

Horizontal bar graph showing the sum of monetary value associated with opportunities in the SQL stage

#### Engagement Score by Account

Horizontal stacked graph showing the average engagement score per account

#### Sales Events by Account

Horizontal stacked graph showing the number of sales activities

**Opportunities: Revenue Win Percentage**

Donut chart showing percent of revenue won versus lost. Uses opportunity record from Salesforce.

**Opportunities: Stage Value by Account**

Horizontal stacked graph showing the sum of monetary value for each account, grouped by pipeline stage. Uses opportunity record from Salesforce.

**Opportunities: Table**

Table of data associated with selected accounts: account name, opportunity name, owner name, amount, account industry, and close date. To open an action menu, click an account, opportunity, or owner name.

**Sales Activities: Time Spent on Events**

Horizontal bar graph showing the sum of hours that opportunity owners have spent on activities associated with the selected accounts

**Sales Activities: Number of Sales Events**

Donut chart showing the number of activities that opportunity owners have spent on activities associated with the selected accounts

## Dataset Reference

### Account-Based Marketing Contact Dataset

Label	Field
Account Name	AccountId.Name
Contact Pardot Score	WhoId.pi__score__c

### Account-Based Marketing Event Dataset

Label	Field
Account Name	AccountId.Name
Contact ID	WhoId.ID
Contact Name	WhoId.Name
Contact Pardot Grade	WhoId.pi__grade__c
Contact Pardot Score	WhoId.pi__score__c
Contact Title	WhoId.Title
Duration	DurationInMinutes
Event Account ID	AccountId.Id
Owner ID	OwnerId.Id
Owner Name	OwnerId.Name

### Account-Based Marketing Opportunity Dataset

Label	Field
Account Industry	AccountId.Industry
Account Name	AccountId.Name
Account Owner ID	AccountId.OwnerId.Id
Amount	Amount
Close Date	CloseDate
Opportunity Name	Name
Owner Name	AccountId.OwnerId.Name

### [Give Analytics Integration User Access to B2B Marketing Analytics](#)

The Analytics Integration User in your org facilitates the transfer of analytics data to B2B Marketing Analytics. For transfers to work properly, add field-level security to the Analytics Cloud Integration User profile.

### [Set Field-Level Security for a Field on All Profiles](#)

## Give Analytics Integration User Access to B2B Marketing Analytics

The Analytics Integration User in your org facilitates the transfer of analytics data to B2B Marketing Analytics. For transfers to work properly, add field-level security to the Analytics Cloud Integration User profile.

Pardot Grade and Pardot Score aren't standard fields. Install the Pardot AppExchange package to use these fields.

For each of these fields, set the field-level security to visible.

Object	Fields
Event	Type
Contact	Lead Source, Pardot Grade, Pardot Score

## Set Field-Level Security for a Field on All Profiles

1. From Setup, open **Object Manager**, and then in the Quick Find box, enter the name of the object containing the field.
2. Select the object, and then click **Fields & Relationships**.
3. Select the field you want to modify.
4. Click **Set Field-Level Security**.
5. Specify the field's access level.
6. Save your changes.

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

### USER PERMISSIONS

To set field-level security:

- Manage Profiles and Permission Sets
- AND
- Customize Application

## Multi-Touch Attribution Dashboard

Multi-Touch Attribution dashboards show you which marketing efforts are most influential during each stage of the purchase lifecycle. After you enable Connected Campaigns, engagement with Pardot's marketing assets and data from Sales Cloud appear together in one dashboard.

To use Multi-Touch Attribution dashboards, set up Connected Campaigns and Campaign Influence.

### EDITIONS

Available in: Pardot **Plus, Advanced, and Premium** Editions with Salesforce **Enterprise** Edition or higher

Available for an extra cost in legacy Pardot **Pro** and **Ultimate** Editions with Salesforce **Enterprise** Edition or higher

## Dashboard Reference

Metric Label	Description	Formula	Origin
Revenue	Total revenue for won opportunities	Sum of Revenue values on Closed/Won opportunities	Multi-Touch Attribution dataset
Sum of Revenue Share (line graph)	Total revenue, with monthly datapoints	Sum of Revenue values on Closed/Won opportunities, grouped by the ending month	Multi-Touch Attribution dataset
Total Value	Total potential value for all opportunities	Sum of Revenue values for all opportunities	Multi-Touch Attribution dataset
Actual Cost	Total actual cost associated with selected campaigns	Sum of Actual Cost values	Multi-Touch Attribution dataset

Metric Label	Description	Formula	Origin
ROI	Percentage of actual campaign costs compared to net revenue	$([\text{Sum of revenue values for all campaigns} - \text{Sum of actual cost values for all campaigns}] / \text{Sum of actual cost values})$	Multi-Touch Attribution dataset
Top Salesforce Campaigns	Total revenue, grouped by individual Salesforce campaign	N/A	Multi-Touch Attribution dataset
Revenue Share by Campaign Type	Total revenue, grouped by Salesforce campaign type	N/A	Multi-Touch Attribution dataset

## Dataset Reference

The dataset ID of this optional multi-touch attribution dataset is `pdMultiAttrib`.

Label	Field
Account	OpportunityId.AccountId.Name
Account Id	OpportunityId.AccountId
Campaign	CampaignId.Name
Campaign Actual Cost	CampaignId.ActualCost
Campaign Budgeted Cost	CampaignId.BudgetedCost
Campaign End Date	CampaignId.EndDate
Campaign ID	CampaignId
Campaign Influence ID	Id
Campaign Influence Model	ModelId.MasterLabel
Campaign Influence Model ID	ModelId
Campaign Start Date	CampaignId.StartDate
Contact	ContactId.Name
Contact First Name	ContactId.FirstName
Contact ID	ContactId
Contact Last Name	ContactId.LastName
Lead Source	ContactId.LeadSource
Opportunity	OpportunityId.Name
Opportunity ID	OpportunityId
Revenue	CimtaGenerated.TotalRevenue
Revenue Share	RevenueShare



Label	Field
ROI	CimtaGenerated.Roi
Stage Name	OpportunityId.StageName
Total Value	CimtaGenerated.TotalValue

### [Enable Connected Campaigns](#)

When you enable Connected Campaigns, decide which record types you want to connect and create.

## Enable Connected Campaigns

When you enable Connected Campaigns, decide which record types you want to connect and create.


Before you enable the feature or begin connecting campaigns, we recommend that you outline how your campaigns relate to each other. Consider the following tasks. For best results, make sure that every campaign you want to use has a counterpart.

- Identify the Pardot campaigns that you want to keep. Do their equivalent Salesforce campaigns exist?
- Identify the Salesforce campaigns that you want to keep. Do their equivalent Pardot campaigns exist?
- Identify which Pardot campaigns, if any, must stay in Pardot only.
- Create record types or assignments to organize your campaigns.

When the preparation is complete, head over to Pardot Settings and get started with Connected Campaigns.

### Note:

- The Pardot B2BMA Integration user doesn't need the Pardot Marketing User role to enable and work with Connected Campaigns.
- Make sure that you create counterpart campaigns in Salesforce for Pardot default and required campaigns, including Website Tracking and Salesforce Sync. If you aren't using the Email Plug-in campaign, delete it before you connect.
- A Pardot campaign is updated or created each time the Salesforce campaign is edited by a person or process. To limit the number of campaigns created in Pardot, identify a cut-off date for replication.

1. Open the Connected Campaigns page.
  - In Pardot, open **Settings** and click **Edit**. Scroll to Connected Campaigns.
  - In the Lightning app, click the **Pardot Settings** tab and then select **Connectors**. Click  to edit the Salesforce connector, and select the **Campaigns** tab.
2. Select **Enable Connected Campaigns and Engagement History**.
3. Select the Salesforce campaign record types that can be connected.
4. Save your work.

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

### USER PERMISSIONS

To connect campaigns:

- Pardot Administrator role

The previous steps prepare your org for the alignment stage of setup. Unconnected campaigns continue to show in both places. Now, your marketing team can connect campaigns individually or in bulk.

After they're done, complete the setup process by giving Salesforce access to manage the campaigns.

1. On the same connector settings page, select **Use Salesforce to manage all campaigns**.
2. To reduce the number of campaigns that are replicated over time, enter a date under Limit Campaign Creation by Date.
3. To let Pardot users continue to see the remaining unconnected campaigns, select **Show Unconnected Campaigns**.

Users now manage campaigns only in Salesforce. For details about the changes that you can expect, see [Considerations for Connecting Campaigns](#).

## Prospect and Activity Dataset

To identify which content influences prospects in your sales funnel, add the optional Prospect and Activity dataset. Create a lens using this dataset to identify the individual prospect record that acted on a certain asset.

To use the Prospect and Activity dataset, enable it in Marketing Setup and then select it during the app setup in Analytics Studio. In Marketing Setup, enter *B2B Marketing* in the Quick Find box. Open the B2B Marketing Analytics setup page, and click **Enable Dataset** next to the Prospect Activity heading.

The Prospect and Activity dataset includes prospect demographic fields and fields that describe their associated engagement activity. Some metrics, such as email sends, don't appear in this dataset and are derived by other methods. As a result, prospect activity metric values in this dataset can vary from values in other datasets and dashboards.

### Account

API Name: AccountName

Name of the account associated with prospect activity

### Account ID

API Name: AccountId

Salesforce identifier for the prospect's associated account

### Account Name

API Name: Prospect.account\_name

Name of the prospect's associated account

### Activity

API Name: ActivityType

Engagement activity type: click, view, success, or open

### Activity Campaign ID

API Name: ActivityCampaignId

Salesforce identifier for the associated campaign

### Activity Campaign Name

API Name: ActivityCampaignName

Campaign associated with the activity

### Activity Date

API Name: ActivityDate

### EDITIONS

Available in: Pardot **Plus**, **Advanced**, and **Premium** Editions with Salesforce **Enterprise** Edition or higher

Available for an extra cost in legacy Pardot **Pro** and **Ultimate** Editions with Salesforce **Enterprise** Edition or higher

Date and time the prospect engaged in the activity (UTC)

**Address One**

API Name: Prospect.address\_one

Address One field associated with the prospect

**Address Two**

API Name: Prospect.address\_two

Address Two field associated with the prospect

**Annual Revenue**

API Name: Prospect.annual\_revenue

The prospect's associated company's annual revenue

**Archived**

API Name: Prospect.is\_archived

True or false whether the prospect has been archived

**Asset Activity**

API Name: AssetActivity

Combined label for asset and activity type: form view, form success, list email click, list email open, file view success, file view, custom URL click, landing page view, landing page success, form handler success, automated email click, automated email open, website visit, or priority page view

**Asset ID**

API Name: AssetId

Salesforce identifier for the asset a prospect engaged with

**Asset Name**

API Name: AssetName

The name of the asset a prospect engaged with: form, list email, file, custom URL, landing page, form handler, automated email, website, or priority page

**Asset Type**

API Name: AssetType

The type of asset a prospect engaged with

**Assigned User First Name**

API Name: Prospect.assigned\_user\_first\_name

First name of the prospect's assigned user

**Assigned User Full Name**

API Name: Prospect.assigned\_user\_full\_name

Full name of the prospect's assigned user

**Assigned User Last Name**

API Name: Prospect.assigned\_user\_last\_name

Last name of the prospect's assigned user

**CRM Contact FID**

API Name: Prospect.crm\_contact\_fid

Salesforce identifier for the contact record associated with the prospect

**CRM Lead FID**

API Name: Prospect.crm\_lead\_fid

Salesforce identifier for the lead record associated with the prospect

**CRM Owner FID**

API Name: Prospect.crm\_owner\_fid

Salesforce identifier for the prospect owner

**City**

API Name: Prospect.city

The prospect's city

**Comments**

API Name: Prospect.comments

The text of user comments associated with the prospect

**Company**

API Name: Prospect.company

The prospect's company

**Country**

API Name: Prospect.country

The prospect's country

**Created by First Name**

API Name: Prospect.created\_by\_first\_name

First name of the user who created the prospect

**Created by Full Name**

API Name: Prospect.created\_by\_full\_name

Full name of the user who created the prospect

**Created by Last Name**

API Name: Prospect.created\_by\_last\_name

Last name of the user who created the prospect

**Department**

API Name: Prospect.department

The prospect's department

**Email**

API Name: Prospect.email

The prospect's email address

**Employees**

API Name: Prospect.employees

Number of employees working at the prospect's company

**External ID**

API Name: ActorExternalId

Unique identifier for the prospect

**Fax**

API Name: Prospect.fax

The prospect's fax number

**First Name**

API Name: Prospect.first\_name

The prospect's first name

**Full Name**

API Name: Prospect.full\_name

The prospect's full name

**Grade**

API Name: Prospect.grade

The prospect's Pardot Grade

**ID**

API Name: ActorId

Salesforce identifier for the prospect's associated lead or contact record. This field is used to match prospects to CRM leads and contacts.

**Industry**

API Name: Prospect.industry

The prospect's industry

**Is Do Not Call**

API Name: Prospect.is\_do\_not\_call

True or false whether the prospect can receive phone calls

**Is Do Not Email**

API Name: Prospect.is\_do\_not\_email

True or false whether the prospect can receive emails

**Job Title**

API Name: Prospect.job\_title

The prospect's job title

**Last Name**

API Name: Prospect.last\_name

The prospect's last name

**Name**

API Name: ActorName

The prospect's full name

**Opted Out**

API Name: Prospect.opted\_out

True or false. whether the prospect has opted out of marketing emails

**Pardot Account ID (external)**

API Name: Prospect.pardot\_account\_id

Unique identifier for the prospect. This field is used to match prospects to CRM leads and contacts.

**Pardot Activity ID**

API Name: ActivityExternalId

Unique identifier for the activity. This field is used to match engagement activity to prospects, leads, and contacts.

**Pardot Asset ID**

API Name: AssetExternalId

Unique identifier for the asset that a prospect engaged with

**Phone**

API Name: Prospect.phone

The prospect's phone number

**Prospect Archived**

API Name: ProspectIsArchived

True or false. Whether the prospect has been archived

**Prospect Assigned Date**

API Name: Prospect.assigned\_date

Date a prospect was assigned to a user (UTC)

**Prospect CRM Last Activity Date**

API Name: Prospect.crm\_last\_activity\_date

Date of the prospect's last recorded interaction with an asset (UTC)

**Prospect Created At Date**

API Name: Prospect.created\_at\_date

Date the prospect was created

**Prospect ID (external)**

API Name: Prospect.id

Unique identifier for the prospect. This field is used to match prospects to CRM leads and contacts.

**Prospect Job Title**

API Name: ProspectJobTitle

The prospect's job title

**Prospect Last Activity Date**

API Name: Prospect.last\_activity\_date

Date of the prospect's last activity recorded

**Prospect Pardot Campaign Id**

API Name: ProspectCampaignExternalId

Unique identifier for the first-touch Pardot campaign that a prospect is associated with

**Prospect Type**

API Name: ActorType

Type of record: Prospect, Lead, or Contact

**Prospect Updated At Date**

API Name: Prospect.updated\_at\_date

Date a prospect was last updated

**Salutation**

API Name: Prospect.salutation

The prospect's preferred title

**Score**

API Name: Prospect.score

The prospect's Pardot Score

**Source**

API Name: Prospect.source

How the prospect was added

**Source Campaign**

API Name: Prospect.source\_campaign

The name of the associated Pardot campaign

**State**

API Name: Prospect.state

The prospect's state

**Tags**

API Name: Prospect.tags

Tags associated with the prospect

**Territory**

API Name: Prospect.territory

The prospect's territory

**Updated by First Name**

API Name: Prospect.updated\_by\_first\_name

First name of the user who last updated the prospect

**Updated by Last Name**

API Name: Prospect.updated\_by\_last\_name

Last name of the user who last updated the prospect

**Website**

API Name: Prospect.website

Website URL associated with the prospect's company

**Years In Business**

API Name: Prospect.years\_in\_business

Number of years the prospect's company has been in business

**Zip**

API Name: Prospect.zip

The prospect's ZIP code

## Member Values for Recipes

When using recipes in B2B Marketing Analytics, use these labels and member values to map your fields.

**Field Label: Asset Type**

Form, "1"

List Email, "2"

Custom Url, "4"

Landing Page, "5"

Form Handler, "6"

Automated Email, "7"

Website Visit, "8"

Priority Page View, "9"

**Field Label: Activity Type**

Click, "1", "21"

View, "2"

Success, "4"

Open, "11"

Visit, "20"

**Field Label: Asset Activity**

Form View, "1 2"

Form Success, "1 4"

List Email Click, "2 1"

List Email Open, "2 11"

File View, "3 2"

Custom Url Click, "4 21"

Landing Page View, "5 2"

Landing Page Success, "5 4"

Form Handler Success, "6 4"

Automated Email Click, "7 1"

Automated Email Open, "7 11"

Website Visit, "8 20"

Priority Page View, "9 2"

**Field Label: Prospect Type**

Lead, "1"

Contact, "2"

Prospect, "3"

## B2B Marketing Analytics Glossary

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Familiarize yourself with common CRM Analytics terminology.



**Aggregate**

A summary of the data based on a grouping. For example, sum of the amounts or count of rows of data, as in the initial exploration state.

**App**

In CRM Analytics, an app contains dashboards, lenses, and datasets in any combination that makes sense for sharing your data analysis with colleagues. Apps are like folders, and let users control sharing and organize their data projects.

**Dashboard**

A curated set of charts, metrics, and tables based on the data in one or more lenses.

**Dataset**

Contains a set of source data that is formatted and optimized for interactive exploration.

**Dimension**

A qualitative value, such as region, product name, or model number.

**Filter**

You can filter the data to narrow your results. For example, you can show only opportunities within a certain fiscal year. Filters included with B2B Marketing Analytics include:

- Date range
- Stage (Opportunity Stage)
- Tags (Pardot Tags)

**Group**

You can group the data by a specific dimension. For example: group by product name or account.

**Lens**

A particular view into a dataset's data. You use a lens to do exploratory analysis and visualization.

**Measure**

A quantitative value, such as revenue or exchange rate. You can do math on measures, such as calculate the total revenue or minimum exchange rate.

**Template**

A framework for analytics apps that comes preset with KPIs and visualizations.

**Visualization**

A visual representation of data, such as a chart, graph, comparison table, or pivot table.

[B2B Marketing Analytics Dashboards](#)

B2B Marketing Analytics includes prebuilt dashboards to meet the needs of everyone on the team. Each dashboard features widgets that outline or visualize helpful metrics. Data for these dashboards originates in Pardot, Salesforce, or both sources.

[B2B Marketing Analytics Datasets](#)

Several datasets become available when you set up B2B Marketing Analytics. In the B2B Marketing Analytics app, combine and filter the fields to create helpful metrics that tell you more about your marketing and sales performance.

## B2B Marketing Analytics Dashboards

B2B Marketing Analytics includes prebuilt dashboards to meet the needs of everyone on the team. Each dashboard features widgets that outline or visualize helpful metrics. Data for these dashboards originates in Pardot, Salesforce, or both sources.

 **Note:** Certain terms used in these descriptions can refer to fields in either Pardot or Salesforce.

- Monetary value is derived from the Value field on a Pardot opportunity. The Value field maps to the Amount field on a Salesforce opportunity.
- Cost is derived from the Cost field on a campaign in Pardot. When campaigns are connected, the Cost field on a Pardot campaign maps to the Budgeted Cost field in Salesforce.
- Value in the Multi-Touch Attribution and Account-Based Marketing dashboards is derived from the Amount field on a Salesforce opportunity.
- Sales Activities in the Account-Based Marketing dashboard include all values from the Type field on your Event object.

### EDITIONS

Available in: Pardot **Plus**, **Advanced**, and **Premium** Editions with Salesforce **Enterprise** Edition or higher

Available for an extra cost in legacy Pardot **Pro** and **Ultimate** Editions with Salesforce **Enterprise** Edition or higher

## Marketing Manager Dashboard

The Marketing Manager dashboard offers many widgets and charts. In addition to the Pipeline Deals and Email Engagement widget collections, the dashboard includes charts that group and rank campaign and asset data.

### Pipeline Deals Section

The metrics in this section use data from the [Opportunity dataset](#) on page 43, pdOpportunity, which combines data from both sources.

Metric Label	Description	Formula	Origin
Opportunities in Pipeline	Number of opportunities <b>not</b> in Won or Lost stage	N/A	pdOpportunity dataset
Donut Chart (no label)	Total number of opportunities (center) and the number of opportunities in SQL, Won, and Lost stages (ring)	N/A	pdOpportunity dataset
Pipeline	Total value of open opportunities	Sum of monetary value associated with open opportunities	pdOpportunity dataset
Revenue	Total value of opportunities in the Closed/Won stage	Sum of monetary value associated with opportunities in the Won stage	pdOpportunity dataset
Avg. Conversion to Close	Average close velocity in days, based on Closed/Won opportunities	(Sum of [Opportunity Close Date - Opportunity Creation Date]) / Total Closed/Won opportunities	pdOpportunity dataset
Revenue by Campaign	Total revenue associated with individual campaigns	Sum of Value fields, based on campaigns that are associated with an opportunity	pdOpportunity dataset

### Email Engagement Widget

The metrics in this widget use data from the [Email dataset](#) on page 36, pdEmail, which contains data from both sources.

Metric Label	Description	Formula	Origin
Total Sent	Total emails sent	Count of sent emails	pdEmail dataset
Hard Bounces	Total hard bounces	Count of hard bounces	pdEmail dataset
Unique CTR	Percentage of prospects who clicked email links	Unique clicks / Total delivered Delivered is (Sent emails - hard bounces)	pdEmail dataset
Unique Open Rate	Percentage of unique HTML opens compared to the total delivered emails	Unique HTML opens / Total delivered Delivered is (Sent emails - hard bounces)	pdEmail dataset
Opt-Outs	Total number of prospects that have clicked the link to unsubscribe or that opted out of all email communications in the Email Preference Center	N/A	pdEmail dataset
SPAM Complaints	Total number of prospects that reported the email as spam	N/A	pdEmail dataset

### Other Charts

#### Revenue by Campaign

Donut chart showing the sum of monetary value of opportunities in the Won stage; grouped by campaign name. Stage values come from Salesforce.

#### Top Forms

Horizontal bar graph showing the top 10 forms based on the number of unique form submissions. Form data comes from Pardot.

#### Landing Page Completion

Donut chart showing the top 10 landing pages based on the number of unique landing page submissions. Landing Page data comes from Pardot.

## Pipeline

The metrics throughout the Pipeline dashboard originate from the Opportunity, Prospects, and Visitors datasets.

The **Lifecycle Snapshot** area displays stages in your prospect lifecycle: Visitors, Prospects, MQLs, SQLs, and Closed Won. The number between two tiles represents the average number of days for people to move stage to stage.

After the **Pipeline Breakdown** section, are three graphs: Source Campaigns, Pipeline by Company, and Lead Sources. The first two graphs show the monetary value that is associated with opportunities' individual campaigns, companies, and marketing channels. The Lead Sources graph indicates the count of lead sources.

#### Pipeline Breakdown Widget

The metrics in this widget use data from the pdOpportunity dataset, pdVisitor dataset, and pdProspect dataset.

Metric Label	Description	Formula	Origin
Total Value	Total value of opportunities in the pipeline	Sum of monetary value associated with opportunities <b>not</b> in Closed/Won or Closed/Lost stage	pdOpportunity dataset
Opportunities in Pipeline	Number of opportunities in the pipeline	Count of all opportunities <b>not</b> in Won or Lost stage	pdOpportunity dataset
Cost	Total cost of selected campaigns	Sum of budgeted cost fields for selected campaigns	pdOpportunity dataset
Revenue	Total value of won opportunities	Sum of monetary value associated with opportunities in the Closed/Won stage	pdOpportunity dataset
Visitor Conversion Rate	Percentage of prospects compared to total visitors	$(\text{Prospects} / \text{visitors}) * 100$	pdVisitor, pdProspect datasets
Opportunity Win Rate	Percentage of won opportunities	$(\text{Closed/Won opportunities} / \text{Closed opportunities}) * 100$	pdOpportunity dataset
ROI	Percentage of campaign cost compared to net revenue	$(\text{Total revenue} / \text{Sum of actual cost fields for campaigns}) * 100$	pdOpportunity dataset

## Engagement

 **Note:** Some values are used in more than one widget.

### List Email Engagement Widget and Email Template Widget

Metric descriptions are the same for both tables. The origin for List Email widget data is the [Email dataset](#) on page 36, pdEmail. Email Template widget data originates in the [Email Template dataset](#) on page 38, pdEmailTemplate.

Metric Label	Description	Formula
List Emails Sent	Total number of emails sent	N/A
Total Opens	Total number of emails opened	N/A
Unique Open Rate	Percentage of unique opens based on delivered emails	$\text{Unique HTML opens} / (\text{Sent emails} - \text{bounces}) * 100$
Unique Opens	Total number of prospects who opened the email	N/A
Total CTR	Percentage of visitors who click links contained in emails delivered. Delivered equals sent emails minus bounces.	N/A
Spam Rate	Percentage of spam complaints received on all emails sent	$\text{Spam complaints} / \text{sent emails}$

Metric Label	Description	Formula
Opt-Outs	Total number of prospects that don't want to receive marketing email	Sum of prospects that clicked Unsubscribe + Prospects who opted out in Email Preference Center
Bounce Rate	Percentage of emails that bounced	Bounced emails / Sent emails
Unique Clicks	Number of unique clicks	N/A
Total Bounces	Number of emails that didn't arrive in email inboxes	Sum of soft bounces and hard bounces

### Forms Engagement Widget

The metrics in this widget originate in the [Forms and Form Handlers dataset](#) on page 40, pdFormAndHandler, which contains data from both sources.

Metric Label	Description	Formula
Total Submission Rate	Percentage of how often forms are completed	Form submissions / Total form views
Form Conversion Rate	Percentage of visitors who convert via forms	Visitor-to-prospect conversions / Total form submissions
Total Views	Number of form views	N/A
Total Submissions	Number of forms completed	N/A
Form Submissions	Number of form submissions	N/A
Handler Submissions	Number of forms submitted via form handler	N/A

### Landing Page Engagement Widget

The metrics in this widget originate in the [Landing Page dataset](#) on page 42, pdLandingPage, which contains data from both sources.

Metric Label	Description	Formula
Unique Views	Number of unique landing page views	N/A
Total Submission Rate	Percentage of submitted landing pages	Landing page submissions / Landing page views
Total Views	Number of landing page views	N/A
Total Submissions	Number of landing page submissions	N/A

## Multi-Touch Attribution

High-level metrics and two charts are available on the Multi-Touch Attribution dashboard. Choose an Influence Model from the dropdown to see an attribution breakdown that works for you.

Metric Label	Description	Formula	Origin
Revenue	Total revenue for won opportunities	Sum of Revenue values on Closed/Won opportunities	Multi-Touch Attribution dataset
Sum of Revenue Share (line graph)	Total revenue, with monthly datapoints	Sum of Revenue values on Closed/Won opportunities, grouped by the ending month	Multi-Touch Attribution dataset
Total Value	Total potential value for all opportunities	Sum of Revenue values for all opportunities	Multi-Touch Attribution dataset
Actual Cost	Total actual cost associated with selected campaigns	Sum of Actual Cost values	Multi-Touch Attribution dataset
ROI	Percentage of actual campaign costs compared to net revenue	$([\text{Sum of revenue values for all campaigns} - \text{Sum of actual cost values for all campaigns}] / \text{Sum of actual cost values})$	Multi-Touch Attribution dataset
Top Salesforce Campaigns	Total revenue, grouped by individual Salesforce campaign	N/A	Multi-Touch Attribution dataset
Revenue Share by Campaign Type	Total revenue, grouped by Salesforce campaign type	N/A	Multi-Touch Attribution dataset

## Account-Based Marketing

The Account-Based Marketing dashboard includes an Account Details table alongside pipeline, opportunity, and sales activities charts. Choose an account to filter available widgets, and see the opportunity table update with historical information associated with the selected account.

### Accounts Details Widget

Metric Label	Description	Formula	Origin
Pipeline Value	Sum of monetary value associated with open opportunities	Sum of Amount values on open opportunities	ABM Opportunity dataset
Open Opportunities	Number of open opportunities associated with the selected accounts	Count of open opportunities with an Amount value of more than \$0	ABM Opportunity dataset
Contacts	Number of contacts associated with selected accounts	Count of contact records	ABM Contact dataset
Avg. Engagement Score	Average Pardot Score among all contacts	$(\text{Sum of Pardot Score values}) / (\text{Count of contacts})$	ABM Contact dataset

Metric Label	Description	Formula	Origin
Sales Events	Number of sales activities for the selected accounts	Count of sales activities	ABM Event dataset

## Other Charts

### Pipeline Value by Account

Horizontal bar graph showing the sum of monetary value associated with opportunities in the SQL stage

### Engagement Score by Account

Horizontal stacked graph showing the average engagement score per account

### Sales Events by Account

Horizontal stacked graph showing the number of sales activities

### Opportunities: Revenue Win Percentage

Donut chart showing percent of revenue won versus lost. Uses opportunity record from Salesforce.

### Opportunities: Stage Value by Account

Horizontal stacked graph showing the sum of monetary value for each account, grouped by pipeline stage. Uses opportunity record from Salesforce.

### Opportunities: Table

Table of data associated with selected accounts: account name, opportunity name, owner name, amount, account industry, and close date. To open an action menu, click an account, opportunity, or owner name.

### Sales Activities: Time Spent on Events

Horizontal bar graph showing the sum of hours that opportunity owners have spent on activities associated with the selected accounts

### Sales Activities: Number of Sales Events

Donut chart showing the number of activities that opportunity owners have spent on activities associated with the selected accounts

## B2B Marketing Analytics Datasets

Several datasets become available when you set up B2B Marketing Analytics. In the B2B Marketing Analytics app, combine and filter the fields to create helpful metrics that tell you more about your marketing and sales performance.

The tables include label and field text. When you create or edit queries by hand in CRM Analytics Studio, use the value in the field text column.

 **Note:** Dates and times are returned in Coordinated Universal Time (UTC) unless otherwise noted.

### Pardot Campaign Dataset

The dataset ID is `pdCampaign`. Each row represents an individual Pardot campaign. A connected campaign includes a Campaign ID (CRM) value. This dataset doesn't include data from archived campaigns.

#### EDITIONS

Available in: Pardot **Plus**, **Advanced**, and **Premium** Editions with Salesforce **Enterprise** Edition or higher

Available for an extra cost in legacy Pardot **Pro** and **Ultimate** Editions with Salesforce **Enterprise** Edition or higher

Label	Field	Description	Origin
Campaign Date	campaign_date	Date the campaign is created in Pardot	Pardot
Campaign ID (CRM)	campaign_crm_id	Associated Salesforce campaign ID	Salesforce
Campaign ID (external)	campaign_id	Pardot campaign ID	Pardot
Cost	cost	Total cost of Pardot campaign (currency based on locale)	Pardot
Name	campaign_name	Name of Pardot campaign	Pardot
Tags	tags	Pardot tags associated with the campaign	Pardot

## Pardot Email Dataset

The dataset ID is `pdEmail`. Each row represents 1 day of statistics for an individual list email. List emails related to a connected campaign include values labeled (CRM), which correspond to the counterpart Salesforce campaign. This dataset includes data from active and archived emails. (In demo orgs, archived emails aren't included.)

Label	Field	Description	Origin
Bounce Rate	bounce_rate	Percentage of total bounces compared to emails sent	Pardot
Campaign	campaign_name	Associated campaign name	Pardot
Campaign ID (CRM)	campaign_crm_id	Associated Salesforce campaign ID	Salesforce
Campaign ID (external)	campaign_id	Associated Pardot campaign ID	Pardot
Click To Open Ratio	click_to_open_rate	Percentage of unique link clicks compared to unique HTML opens, totaled by day	Pardot
Created At Date	created_at	Date the email is created in Pardot	Pardot
Created By	created_by	First and last name of Pardot user who created the email	Pardot
Created By - User ID (CRM)	created_by_crm_id	Salesforce user ID of associated Pardot user who created the email	Salesforce
Delivery Rate	delivery_rate	Percentage of emails delivered compared to emails sent, totaled by day	Pardot
Email ID	email_id	Email ID	Pardot



<b>Label</b>	<b>Field</b>	<b>Description</b>	<b>Origin</b>
HTML Open Rate	html_open_rate	Percentage of unique HTML opens compared to emails delivered, totaled by day	Pardot
Name	email_name	Name of the email	Pardot
Opt Out Rate	opt_out_rate	Percentage of opt outs compared to emails delivered, totaled by day	Pardot
Sent On Date	sent_at	Date the email is sent	Pardot
Sent To	sent_to	Names of segmentation lists that the email is sent to	Pardot
Spam Complaint Rate	spam_complaint_rate	Percentage of spam complaints compared to emails delivered, totaled by day	Pardot
Stats Date	stats_date	Date the email statistics are pulled	Pardot
Stats ID	stats_id	Stats ID of the email	Pardot
Subject	subject	Subject line of the email	Pardot
Suppressed From	suppressed_from	Names of segmentations lists that the email can't be sent to	Pardot
Tag	tags	Tags associated with the email	Pardot
Total Bounced	total_bounced	Sum of soft-bounced and hard-bounced emails, totaled by day	Pardot
Total Clicks	total_clicks	Number of link clicks, totaled by day	Pardot
Total CTR	total_ctr	Percentage of link clicks compared to emails delivered, totaled by day	Pardot
Total Delivered	delivered	Number of emails delivered, totaled by day	Pardot
Total Hard Bounced	hard_bounced	Number of emails that hard bounced, totaled by day	Pardot
Total HTML Opens	total_html_opens	Number of HTML opens, totaled by day	Pardot
Total Opt Outs	opt_outs	Number of opt outs, totaled by day	Pardot

Label	Field	Description	Origin
Total Queued	queued	Number of emails queued, totaled by day	Pardot
Total Sent	sent	Number of emails sent, totaled by day	Pardot
Total Soft Bounced	soft_bounced	Number of emails that soft bounced, totaled by day	Pardot
Total Spam Complaints	spam_complaints	Number of spam complaints, totaled by day	Pardot
Unique Clicks	unique_clicks	Number of unique link clicks, totaled by day	Pardot
Unique CTR	unique_ctr	Percentage of unique clicks compared to emails delivered, totaled by day	Pardot
Unique HTML Opens	unique_html_opens	Number of unique HTML opens, totaled by day	Pardot
Updated At Date	updated_at	Date the email is last updated	Pardot
Updated By	updated_by	First and last name of Pardot user who edited the email most recently	Pardot
Updated By - User ID (CRM)	updated_by_crm_id	Salesforce user ID of associated Pardot user who edited the email most recently	Salesforce

## Pardot Email Template Dataset

The dataset ID is `pdEmailTemplate`. Each row represents 1 day of statistics for an individual email template. Email templates associated with a connected campaign include a value that includes (CRM), which corresponds to the counterpart Salesforce campaign. This dataset includes data from active and archived email templates. Email metrics are based on the emails built on selected email templates.

Label	Field	Description	Origin
Bounce Rate	bounce_rate	Percentage of unique link clicks compared to unique HTML opens, totaled by day	Pardot
Campaign	campaign_name	Name of Pardot campaign associated with the email template	Pardot
Campaign ID (CRM)	campaign_crm_id	Associated Salesforce campaign ID	Salesforce

Label	Field	Description	Origin
Campaign ID (external)	campaign_id	Associated Pardot campaign ID	Pardot
Created At Date	created_at	Date the email template is created	Pardot
Delivery Rate	delivery_rate	Percentage of emails delivered compared to emails sent, totaled by day	Pardot
Email Template ID	email_template_id	Email template ID	Pardot
Open Rate	html_open_rate	Percentage of unique HTML opens compared to emails delivered, totaled by day	Pardot
Name	email_template_name	Name of email template	Pardot
Opt Out Rate	opt_out_rate	Percentage of opt outs compared to emails delivered, totaled by day	Pardot
Sender	sender	A name in the Sender field of the email template. This field displays the specified user or general username that appears at the end of the sending hierarchy, if the name is available.	Pardot
Spam Complaint Rate	spam_complaint_rate	Percentage of spam complaints compared to emails delivered, totaled by day	Pardot
Stats Date	stats_date	Date the email template statistics are pulled	Pardot
Stats ID	stats_id	Stats ID of the email template	Pardot
Subject	subject	Subject line of the email template	Pardot
Tag	tags	Tags associated with the email template	Pardot
Total Bounces	total_bounces	Sum of soft-bounced and hard-bounced emails, totaled by day	Pardot
Total Clicks	total_clicks	Number of link clicks, totaled by day	Pardot
Total CTR	total_ctr	Percentage of link clicks compared to emails delivered, totaled by day	Pardot

Label	Field	Description	Origin
Total Delivered	total_delivered	Number of emails delivered, totaled by day	Pardot
Total Hard Bounced	total_hard_bounced	Number of emails that hard bounced, totaled by day	Pardot
Total HTML Opens	total_html_opens	Number of HTML opens, totaled by day	Pardot
Total Opt Outs	opt_outs	Number of opt outs, totaled by day	Pardot
Total Queued	queued	Number of emails queued, totaled by day	Pardot
Total Sent	sent	Number of emails sent, totaled by day	Pardot
Total Soft Bounced	total_soft_bounced	Number of emails that soft bounced, totaled by day	Pardot
Total Spam Complaints	spam_complaints	Number of spam complaints, totaled by day	Pardot
Type	type	Type of email template: HTML or Text	Pardot
Unique Clicks	unique_clicks	Number of unique link clicks, totaled by day	Pardot
Unique CTR	unique_ctr	Percentage of unique clicks compared to emails delivered, totaled by day	Pardot
Updated At Date	updated_at	Date the email template is last updated in Pardot	Pardot

## Pardot Form and Form Handler Dataset

The dataset ID is `pdFormAndHandler`. Each row represents 1 day of statistics for an individual form or form handler. Assets associated with a connected campaign contain a value that includes "(CRM)," which corresponds to the counterpart Salesforce campaign. This dataset includes data from active and archived forms and form handlers.

Label	Field	Description	Origin
Campaign	campaign_name	Associated campaign name	Pardot
Form or Form Handler ID	asset_id	Asset ID	Pardot
Campaign ID (CRM)	campaign_crm_id	Associated Pardot campaign ID	Salesforce
Campaign ID (external)	campaign_id	Associated Salesforce campaign ID	Pardot

<b>Label</b>	<b>Field</b>	<b>Description</b>	<b>Origin</b>
Conversions	conversion	Number of conversions, totaled by day	Pardot
Name	asset_name	Name of the asset	Pardot
Stats Date	stats_date	Date the form and form handler statistics are pulled	Pardot
Tags	tags	Tags associated with the email	Pardot
Total Clicks	total_clicks	Number of link clicks, totaled by day	Pardot
Total Conversion Rate	total_conversion_rate	Percentage of conversions compared to form and form handler submissions, totaled by day	Pardot
Total Error Rate	total_error_rate	Percentage of errors compared to form and form handler submissions, totaled by day	Pardot
Total Errors	total_errors	Number of errors, totaled by day	Pardot
Total Submission Rate	total_submission_rate	Percentage of submissions compared to form and form handler views, totaled by day	Pardot
Total Submissions	total_submissions	Number of form and form handler submissions, totaled by day	Pardot
Total Views	total_views	Number form and form handler views, totaled by day	Pardot
Type	asset_type	Type of asset: Form or Form Handler	Pardot
Unique Clicks	unique_clicks	Number of unique link clicks, totaled by day	Pardot
Unique Errors	unique_errors	Number of unique errors, totaled by day	Pardot
Unique Submissions	unique_submissions	Number of unique submissions, totaled by day	Pardot
Unique Views	unique_views	Number of unique views, totaled by day	Pardot

## Pardot Landing Page Dataset

The dataset ID is `pdLandingPage`. Each row represents 1 day of statistics for an individual landing page. Assets related to a connected campaign contain a value that includes "(CRM)," which corresponds to the counterpart Salesforce campaign. This dataset includes data from active and archived landing pages.

Label	Field	Description	Origin
Campaign	<code>campaign_name</code>	Associated campaign name	Pardot
Campaign ID (CRM)	<code>campaign_crm_id</code>	Associated Pardot campaign ID	Pardot
Campaign ID (external)	<code>campaign_id</code>	Associated Salesforce campaign ID	Salesforce
Conversions	<code>conversion</code>	Associated Salesforce campaign ID	Salesforce
Created	<code>created_at</code>	Date the landing page is created	Pardot
Created By	<code>created_by</code>	First and last name of Pardot user who created the email	Pardot
Created By - User ID (CRM)	<code>created_by_crm_id</code>	Salesforce user ID of associated Pardot user who created the email	Salesforce
Form	<code>form_name</code>	Name of the included form, if applicable	Pardot
Landing Page ID	<code>landing_page_id</code>	Unique identifier for the landing page	Pardot
Name	<code>landing_page_name</code>	Name of the landing page	Pardot
Short URL	<code>short_url</code>	Short URL of the landing page	Pardot
Stats Date	<code>stats_date</code>	Date the landing page statistics are pulled	Pardot
Submission Rate	<code>submissionRate</code>	Percentage of submissions compared to landing page views, totaled by day. (Hidden)	Pardot
Tags	<code>tags</code>	Tags associated with the landing page	Pardot
Total Clicks	<code>total_clicks</code>	Number of link clicks, totaled by day	Pardot
Total Errors	<code>total_errors</code>	Number of form errors, totaled by day	Pardot
Total Submissions	<code>total_submissions</code>	Number of form and landing page submissions, totaled by day	Pardot

Label	Field	Description	Origin
Total Views	total_views	Number of landing page views, totaled by day	Pardot
Unique Clicks	unique_clicks	Number of unique link clicks, totaled by day	Pardot
Unique Errors	unique_errors	Number of unique form errors, totaled by day	Pardot
Unique Submissions	unique_submissions	Number of unique submissions, totaled by day	Pardot
Unique Views	unique_views	Number of unique landing page views, totaled by day	Pardot
Updated	updated_at	Date the landing page is last updated	Pardot
Updated By	updated_by	First and last name of Pardot user who edited the landing page most recently	Pardot
Updated By - User ID (CRM)	created_by_crm_id	Salesforce user ID of associated Pardot user who edited the landing page most recently	Salesforce
URL	url	Full URL of the landing page	Salesforce

## Pardot Opportunity Dataset

The dataset ID is `pdOpportunity`. Each row represents an individual Pardot opportunity. Opportunities related to a connected campaign contain a value that includes "(CRM)," which corresponds to the counterpart Salesforce campaign. This dataset includes data from active and archived opportunities.

Label	Field	Description	Origin
Account ID (CRM)	account_crm_id	Account ID that the prospect or lead is related to	Salesforce
Pardot Campaign	campaign_name	Name of a Pardot campaign that the prospect is assigned to	Pardot
Campaign Date	campaign_date	Date and time the campaign is created	Pardot
Campaign Cost	campaign_cost	Campaign cost amount associated with the opportunity (currency is based on the locale setting)	Pardot

Label	Field	Description	Origin
CRM Campaign ID	campaign_crm_id	Salesforce ID of the opportunity's associated Pardot campaign	Salesforce
Pardot Campaign ID	campaign_id	ID for the opportunity's associated Pardot campaign	Pardot
Close Date	close_date	Date and time that the opportunity is closed	Pardot
Monetary Value	monetary_value	Dollar amount of the opportunity's value (currency is based on the locale setting)	Pardot
Opportunity Created Date	opportunity_date	Date and time the opportunity is created in Salesforce	Pardot
CRM Opportunity ID	opportunity_crm_id	Salesforce ID of the opportunity	Salesforce
Pardot Opportunity ID	opportunity_id	ID of the Pardot opportunity	Pardot
Opportunity Status	opportunity_status	Status of the opportunity: Open, Won, or Lost	Salesforce
Opportunity Stage	opportunity_stage	Lifecycle stage of the opportunity in Salesforce	Salesforce
Opportunity Type	opportunity_type	Type of opportunity, from Salesforce	Salesforce
Opportunity Name	opportunity_name	Name of the opportunity in Salesforce	Salesforce
Opportunity Probability	opportunity_probability	Percentage of estimated confidence in closing the opportunity, from Salesforce	Salesforce
Tags	tags	Tags associated with the opportunity	Pardot

## Pardot Prospect Dataset

The dataset ID is `pdProspect`. Each row represents a unique prospect. Prospects related to a lead or contact in Salesforce include values labeled (CRM). By default, this dataset includes data from active and archived prospects. An admin can edit this option in Pardot Settings.

Label	Field	Description	Origin
Account Name	account_name	Prospect's account name	Pardot
Address One	address_one	Prospect's address, line one	Pardot
Address Two	address_two	Prospect's address, line two	Pardot



Label	Field	Description	Origin
Annual Revenue	annual_revenue	Annual revenue for prospect's company	Pardot
Is Archived	is_archived	Indicates whether the prospect record is in the recycle bin: True or False	Pardot
Assigned Date	assigned_date	Date and time that prospect is assigned to a user	Pardot
Is Assigned	is_assigned	Indicates whether the prospect is assigned to a user: true or false	Pardot
Assigned User First Name	assigned_user_first_name	First name of the prospect's assigned user	Pardot
Assigned User Full Name	assigned_user_full_name	First and last name of the prospect's assigned user	Pardot
Assigned User Last Name	assigned_user_last_name	Last name of the prospect's assigned user	Pardot
City	city	Prospect's city	Pardot
Comments	comments	User comments about the prospect	Pardot
Company	company	Prospect's company name	Pardot
Country	country	Prospect's country	Pardot
Created At Date	created_at_date	Date and time that prospect is created	Pardot
Created by First Name	created_by_first_name	First name of the user who created the prospect	Pardot
Created by Full Name	created_by_full_name	First and last name of the user who created the prospect	Pardot
Created By Last Name	created_by_last_name	Last name of the user who created the prospect	Pardot
CRM Account ID	account_crm_id	Salesforce ID for the prospect's account	Salesforce
CRM Contact ID	crm_contact_fid	Salesforce ID for prospect's synced contact	Salesforce
CRM Lead/Contact ID	contact_crm_id	Salesforce ID of prospect's assigned lead or contact record	Salesforce
CRM Last Activity Date	crm_last_activity_date	Date and time of last activity in Salesforce on the prospect's lead or contact record	Salesforce
CRM Lead ID	crm_lead_fid	Salesforce ID for prospect's synced lead	Salesforce
CRM Owner ID	crm_owner_fid	Salesforce ID for the prospect's assigned user	Salesforce
Department	department	Prospect's department	Pardot
Email	email	Prospect's email address	Pardot
Employees	employees	Number of employees who work at the company	Pardot
Fax	fax	Prospect's fax number	Pardot

Label	Field	Description	Origin
First Name	first_name	Prospect's first name	Pardot
First Visit Date	first_visitor_date	Date and time of first visitor activity. Identified by IP address and associated with prospect by email address.	Pardot
Full Name	full_name	Prospect's first and last name	Pardot
Pardot Grade	grade	Prospect's Pardot Grade	Pardot
Industry	industry	Type of industry for prospect's company	Pardot
Is Do Not Call	is_do_not_call	Indicates whether prospect has fully opted out of phone calls: true or false	Pardot
Is Do Not Email	is_do_not_email	Indicates whether the prospect has opted out of all email types: true or false	Pardot
Job Title	job_title	Prospect's job title	Pardot
Last Activity Date	last_activity_date	Date and time that prospect last interacted with a marketing asset	Pardot
Last Name	last_name	Prospect's last name	Pardot
Most Recent Visitor Date	most_recent_visitor_date	Date and time of most recent visitor activity. Identified by different IP address and associated with prospect by the same email address.	Pardot
MQL Date	mql_date	Date and time that the prospect is assigned to the MQL stage	Pardot
Opted Out	opted_out	Indicates whether the prospect has opted out of marketing emails: true or false	Pardot
Pardot Account ID	pardot_account_id	Business unit ID associated with the B2B Marketing Analytics app	Pardot
Pardot Visitor ID	visitor_id	Prospect's visitor ID	Pardot
Phone	phone	Prospect's phone number	Pardot
Pardot Prospect ID	id	Prospect's ID	Pardot
Salutation	salutation	Prospect's preferred title, as a picklist	Pardot
Pardot Score	score	Prospect's Pardot Score	Pardot
Source Campaign	source_campaign	Vendor name and source type that indicates prospect's original source. See <a href="#">How a Prospect's Source Field Is Populated</a>	Pardot
Source	source	Campaign associated with prospect's first touch	Pardot
Stage	stage	Prospect's stage in marketing lifecycle	Pardot
State	state	Prospect's state	Pardot


Label	Field	Description	Origin
Tags	tags	Tags associated with the prospect	Pardot
Territory	territory	Prospect's territory	Pardot
Updated At Date	updated_at_date	Date and time that the prospect was updated	Pardot
Updated By First Name	updated_by_first_name	First name of the user who last updated the prospect	Pardot
Updated By Last Name	updated_by_last_name	Last name of the user who last updated the prospect	Pardot
Website	website	URL of the prospect's company website	Pardot
Years In Business	years_in_business	Length of time the prospect's company has been in business	Pardot
Zip	zip	Prospect's ZIP code	Pardot

## Prospect and Activity Dataset

The dataset ID is `pdProspectActivity`. Each row represents a unique engagement activity and data related to the prospect who performed it.

The fields and labels vary slightly depending on whether you have Object Sync for Pardot turned on.

- [Prospect and Activity Dataset](#) on page 22
- [Prospect and Activity Dataset for Object Sync](#)

 **Note:** For emails sent through Engagement Studio, the Engagement History dataset includes send data only for engagement programs that were created after December 14, 2018.

## Pardot Tags Dataset

Each row of this dataset represents a unique, assigned Pardot tag. This dataset includes active tags for campaigns, emails, forms, form handlers, landing pages, opportunities, and prospects.

Label	Field	Origin
Name	tag_name	Pardot
Tag ID	tag_id	Pardot

## Pardot Users Dataset

The dataset ID is `pdUser`. It's used in app templates only for Pardot. Each row represents one user.

Label	Field	Origin
Created At Date	created_at	Pardot
Email	email	Pardot
First Name	first_name	Pardot

Label	Field	Origin
Full Name	full_name	Pardot
Is Archived	is_archived	Pardot
Job Title	job_title	Pardot
Last Name	last_name	Pardot
Updated At Date	updated_at	Pardot
User ID (external)	user_id	Pardot
Username	username*	Salesforce or Pardot

## Pardot Visitor Dataset

The dataset ID is `pdVisitor`. Each row represents 1 day of statistics for an individual visitor. This dataset doesn't include data from archived visitors.

Label	Field	Origin
Campaign Name	campaign_name	Pardot
Campaign ID (CRM)	campaign_crm_id	Salesforce
Campaign ID (external)	campaign_id	Pardot
Stage	stage	Pardot
Stats Date	stats_date	Pardot
Tags	tags	Pardot
Visitor Count	visitor_count	Pardot

## Account-Based Marketing Datasets

B2B Marketing Analytics features optional account-based marketing offerings that come from three datasets. These datasets include active data only. They exclude data from archived accounts.

### Account-Based Marketing Contact

The dataset ID of this optional account-based marketing dataset is `pdAbmContact`. Each row represents an individual Salesforce contact.

Label	Field
Account Name	AccountId.Name
Contact Pardot Score	WhoId.pi__score__c

### Account-Based Marketing Event

The dataset ID of this optional account-based marketing dataset is `pdAbmEvent`. Each row represents an individual Salesforce event. This data originates in the Email object and pulls records for events that have passed. Event types include Call, Email, Meeting, Prep, and Other.

Label	Field
Account Name	AccountId.Name
Contact ID	WhoId.ID
Contact Name	WhoId.Name
Contact Pardot Grade	WhoId.pi__grade__c
Contact Pardot Score	WhoId.pi__score__c
Contact Title	WhoId.Title
Duration	DurationInMinutes
Event Account ID	AccountId.Id
Owner ID	OwnerId.Id
Owner Name	OwnerId.Name

### Account-Based Marketing Opportunity

The dataset ID of this optional account-based marketing dataset is `pdAbmOpp`. Each row represents an individual Salesforce opportunity.

Label	Field
Account Industry	AccountId.Industry
Account Name	AccountId.Name
Account Owner ID	AccountId.OwnerId.Id
Amount	Amount
Close Date	CloseDate
Opportunity Name	Name
Owner Name	AccountId.OwnerId.Name

### Multi-Touch Attribution Dataset

The dataset ID of this optional multi-touch attribution dataset is `pdMultiAttrib`. Each row represents an individual Salesforce campaign influence record and includes additional campaign, contact, opportunity, and account field values for context.

Label	Field
Account	OpportunityId.AccountId.Name
Account Id	OpportunityId.AccountId

<b>Label</b>	<b>Field</b>
Campaign	CampaignId.Name
Campaign Actual Cost	CampaignId.ActualCost
Campaign Budgeted Cost	CampaignId.BudgetedCost
Campaign End Date	CampaignId.EndDate
Campaign ID	CampaignID
Campaign Influence ID	Id
Campaign Influence Model	ModelId.MasterLabel
Campaign Influence Model ID	ModelId
Campaign Start Date	CampaignId.StartDate
Contact	ContactId.Name
Contact First Name	ContactId.FirstName
Contact ID	ContactId
Contact Last Name	ContactId.LastName
Lead Source	ContactId.LeadSource
Opportunity	OpportunityId.Name
Opportunity ID	OpportunityId
Revenue	CimtaGenerated.TotalRevenue
Revenue Share	RevenueShare
ROI	CimtaGenerated.Roi
Stage Name	OpportunityId.StageName
Total Value	CimtaGenerated.TotalValue