Pardot Setup Implementation Guide

Salesforce, Winter ’23

’23

@salesforcedocs

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INTRODUCTION

Pardot is your solution for B2B marketing automation and includes powerful tools that generate leads so your sales team can close more deals. This guide helps you get your Pardot business unit online and ready for your marketing team to build out marketing assets and get campaigns underway.

Setup includes tasks that often span multiple teams, so it's important to have everything you need in place before you begin. Use the planning worksheet in this guide to get organized and identify who you need to successfully set up Pardot. If you're setting up more than one business unit, we recommend you complete an implementation plan for each business unit.

Tip: Pardot setup requires both a Salesforce admin and a Pardot admin. To reduce the need for multiple admins, you can create a custom permission set in Salesforce to delegate Pardot tasks to a marketing admin. See Designate an Admin for Marketing Setup Tasks.

PLAN YOUR PARDOT IMPLEMENTATION

Print or save this worksheet to help you map out your implementation from start to finish. If you're using multiple Pardot business units, make a copy for each one. Some setup tasks require both a Salesforce admin and a Pardot admin to complete. We strongly recommend your implementation stakeholders plan and collaborate closely to execute setup tasks.

Download the Pardot Implementation Planning Worksheet

SEE ALSO:

Designate an Admin for Marketing Setup Tasks

INSTALL THE APPEXCHANGE PACKAGE AND ENABLE PARDOT

First, your Salesforce admin must install the Pardot AppExchange Package, then enable Pardot in Marketing Setup. After you enable Pardot and assign an admin, set up Salesforce User Sync.

EDITIONS

Available in: All Pardot Editions

Install the Pardot AppExchange Application

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

Enable Pardot in Salesforce

A Salesforce admin must enable new Pardot business units and appoint a Pardot admin. If you have multiple Pardot Business Units, appoint a Pardot admin to each unit.

Install the Pardot AppExchange Application

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

USER PERMISSIONS

To install the Pardot package:

- Download AppExchange Packages (in Salesforce)

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

1. Get the installation link.

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

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

Enable Pardot in Salesforce

A Salesforce admin must enable new Pardot business units and appoint a Pardot admin. If you have multiple Pardot Business Units, appoint a Pardot admin to each unit.

Important: The admin assigned to set up the Pardot business unit can't be changed and their name can't be edited. If that user is removed from Pardot or their Pardot role is updated, their name remains as a historical record on Pardot Account Setup in Salesforce.

1. From Marketing Setup, under Pardot Setup Home, click **Assign Admin**.
2. Name your business unit and assign your Pardot admin. If you're working with multiple business units, we recommend setting up one business unit at a time.
3. Save your changes. After you save, Pardot sends the Pardot admin an email to start the setup process for their business unit.
4. From Marketing Setup under Pardot Setup Home, turn on Pardot in your Salesforce org to make the Pardot Lightning app available only to your Pardot admins.

After you complete provisioning and admin assignment, contact your Pardot admin to make sure they received the email to set up their assigned business unit. Work closely with your Pardot admin to complete key Pardot setup tasks, such as setting up Salesforce User Sync.

EDITIONS

Available in: All Pardot editions purchased after February 11, 2019. Pardot Business Units are available in Pardot **Advanced** Edition.

USER PERMISSIONS

To enable Pardot for your org:

- Customize Application and Modify All Data

To create Pardot Business Units:

- Customize Application and Modify All Data

SET UP SALESFORCE USER SYNC

Salesforce User Sync makes it easy to create and manage Pardot users from Salesforce, so we strongly recommend you set it up as part of your Pardot implementation. To set up User Sync, your Salesforce admin assigns users to Pardot from Salesforce. Then, your Pardot admin transfers user management from Pardot to Salesforce.

EDITIONS

Available in: Pardot business units created after the Summer '20 release

User Sync Basics
User Sync lets you manage Pardot user access from Marketing Setup in Salesforce. Synced user records in Pardot are read-only and inherit information from Salesforce.

Identify or Create Users in Salesforce
Before you set up Salesforce User Sync, make sure you know which users need Pardot access. If you're brand new to Salesforce, create new users that you then assign to Pardot.

Assign Salesforce Users to Pardot
First, have your Salesforce admin assign Salesforce users to Pardot. We recommend that you begin with the users who manage the implementation. After users are assigned, transfer user management to Salesforce and return to Marketing Setup at any time to assign more users.

Transfer User Management to Salesforce
After your Salesforce admin has assigned users to Pardot, your Pardot admin can map Salesforce profiles to user roles in Pardot. Then, the Pardot admin transfers user management to Salesforce to create a Pardot profile for users assigned from Salesforce.

User Sync Basics

User Sync lets you manage Pardot user access from Marketing Setup in Salesforce. Synced user records in Pardot are read-only and inherit information from Salesforce.

Note: If you use the legacy version of User Sync, make sure you also review Considerations for Moving to the Latest Version of User Sync. If you're not sure what your User Sync status is, see Find the Right User Sync Documentation.

Process Overview

To take advantage of Salesforce User Sync, first assign Salesforce users to Pardot and then transfer user management to Salesforce. This process requires a Salesforce admin and a Pardot admin. Depending on the structure of your business, it's possible you need more than one person to complete all the tasks.

Note: This video walks through User Sync setup: Manage Pardot Users with Salesforce User Sync (English Only).

User Management

Here's how user management works after user management is transferred to Salesforce.

- A Pardot user record is created for any user assigned to Pardot in Salesforce. You can assign users individually, or based on public group, role, or role and subordinates.

- The Salesforce user record is the source of truth. All Pardot user fields update to match the Salesforce record.
- When a user sends an email in Pardot, the email is sent from the email address on their Salesforce user record.
- Pardot user alerts and notifications are sent to their Salesforce email.
- If a user assigned to Pardot is in the recycle bin in Pardot, the user record is restored.
- To delete a Pardot user, unassign them in Salesforce. Unassigning a user sends their record to the recycle bin in Pardot.
- If there's a Pardot user with the same email address as a Salesforce user but they're not mapped, User Sync skips them. A new Pardot user record isn't created and the existing user profile isn't synced.
- Changes to user records in Salesforce typically sync within 10 minutes. For accounts with tens of thousands of users, it can take up to an hour.

Salesforce Profiles and Pardot Roles

When you assign users to Pardot, you add them to the Marketing Users group or the Sales Users group. User group assignments can be used for sharing rules, and they correspond to default Pardot role assignments.

Salesforce profiles are mapped one-to-one to Pardot user roles, but some scenarios require a more granular Salesforce profile. If your users that share a Salesforce profile need different levels of access in a business unit, you can give a user a more granular profile.

Example: Jon and Deepa both have the Marketing profile in Salesforce. Jon needs the Marketing Manager role in the Europe business unit, and Deepa needs the Marketing role. Because Jon and Deepa share the original profile, and profiles are mapped one-to-one to user roles, the Salesforce admin creates a unique profile for Jon. The Europe business unit admin maps the new profile to the correct Pardot user role.

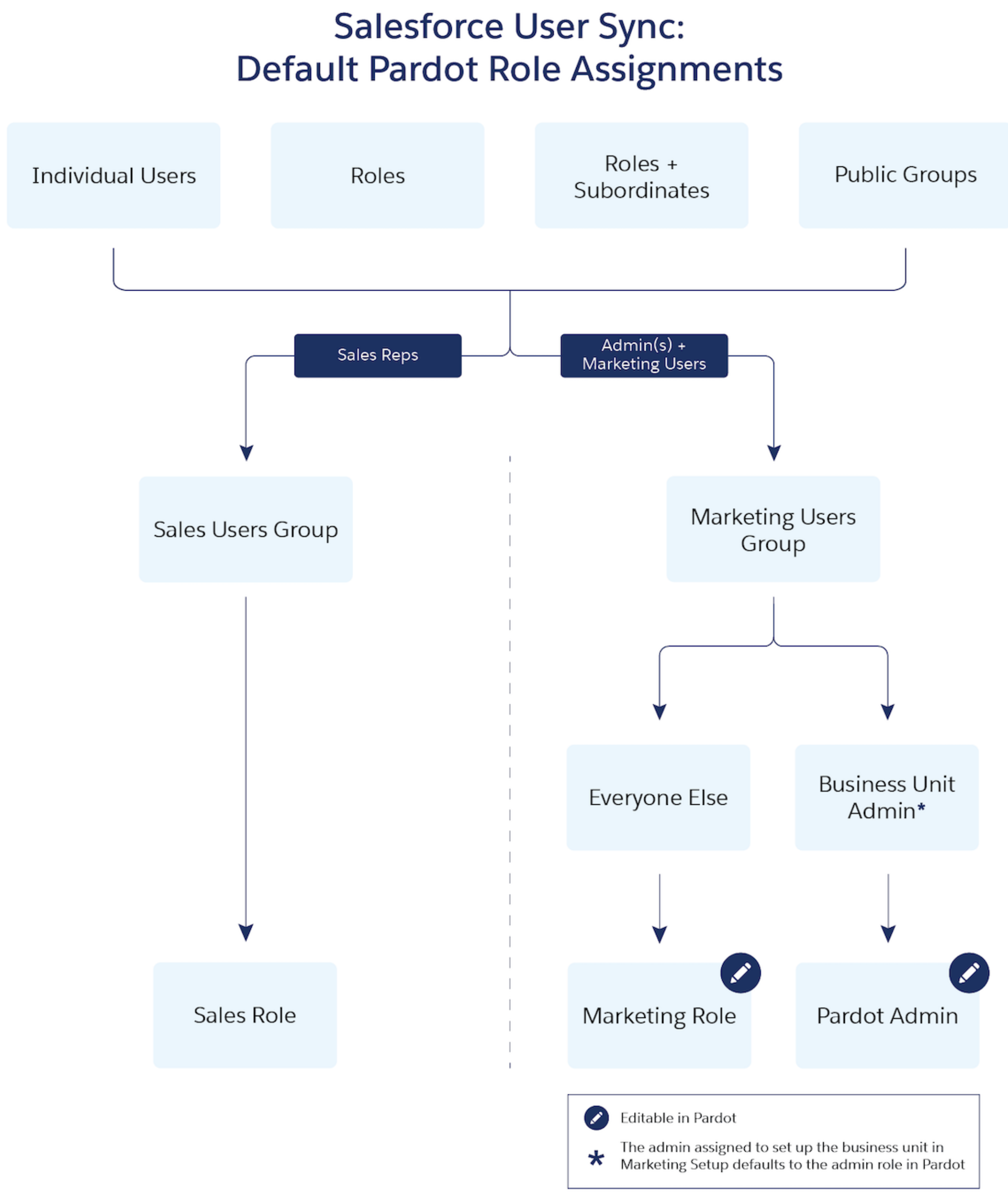
Important: Assign admins and most other Pardot users to the Marketing User group in Salesforce. The Sales User group is only for sales reps who need restricted access to Pardot.

After users are assigned to Pardot, the Pardot admin can update the profile-to-role mapping table in Pardot for the Marketing User group, or leave the default mapping in place.

Here's how Pardot roles are determined by default:

- Users in the Sales Users group always inherit the Sales role in Pardot. This role mapping can't be edited in Pardot.
- Users in the Marketing Users group have their Salesforce profile mapped to the Marketing role in Pardot. This mapping is editable in Pardot.
- If the Pardot admin who created the business unit is assigned to Pardot in the Marketing Users group, they retain the Pardot admin role.

This chart shows how user assignments translate to default roles in Pardot. The default Pardot role is editable for all users assigned to the Marketing Users group in Salesforce.


Salesforce User Sync:
Default Pardot Role Assignments
Individual Users
Roles
Roles + Subordinates
Public Groups
Sales Reps
Admin(s) + Marketing Users
Sales Users Group
Marketing Users Group
Everyone Else
Business Unit Admin*
Sales Role
Marketing Role
Pardot Admin
Editable in Pardot
* The admin assigned to set up the business unit in Marketing Setup defaults to the admin role in Pardot

Identify or Create Users in Salesforce

Before you set up Salesforce User Sync, make sure you know which users need Pardot access. If you're brand new to Salesforce, create new users that you then assign to Pardot.

SEE ALSO:

Add a Single User

Add Multiple Users

Assign Salesforce Users to Pardot

EDITIONS

Available in: Business units created after the Summer '20 release

USER PERMISSIONS

To assign Salesforce users to business units:

- Customize application and manage users

First, have your Salesforce admin assign Salesforce users to Pardot. We recommend that you begin with the users who manage the implementation. After users are assigned, transfer user management to Salesforce and return to Marketing Setup at any time to assign more users.

Assigned users don't have access until you set up permissions for Pardot Lightning app. Users assigned to the Sales Users group in Salesforce are given the Sales role in Pardot. Changing a user's Pardot role must be done in Salesforce.

1. From Marketing Setup, in the Quick Find box, enter Pardot, and then select **Pardot Account Setup**.
2. Next to your business unit, click **Manage Users**.
3. Click **Edit User Assignments**.
4. Use the dropdowns to add users to the Marketing Users group and the Sales Users group.
5. Save your changes. To see a list of your assigned users, click **View All Users**.

After users are assigned, the Pardot admin can transfer user management to Salesforce where a profile is created for each assigned user.

Transfer User Management to Salesforce

EDITIONS

Available in: Pardot business units created after July 20, 2020 or with Salesforce User Sync enabled before that date

USER PERMISSIONS

To transfer user management to Salesforce:

- Pardot Administrator role

After your Salesforce admin has assigned users to Pardot, your Pardot admin can map Salesforce profiles to user roles in Pardot. Then, the Pardot admin transfers user management to Salesforce to create a Pardot profile for users assigned from Salesforce.

1. Open the Salesforce connector page.
   - In Pardot, select **Admin** and then select **Connectors**. Click next to the Salesforce connector, and select **Edit**.
   - In the Lightning app, select **Pardot Settings** and then **Connectors**. Click next to the Salesforce connector, and select **Edit Settings**.
2. Click the **User Sync** tab.
3. Review the default user roles for each Salesforce profile. If needed, use the dropdowns to change the assigned roles. You can come back and edit the profile-to-role mapping table later.
4. Save your changes, and then click **Opt In** to transfer user management to Salesforce.

After user management is transferred, a profile is created for each user assigned in Salesforce. User changes in Salesforce typically take about 10 minutes to take effect.

SET UP THE PARDOT LIGHTNING APP

Set up the Pardot Lightning app to grant users access to Pardot. The Pardot Lightning app offers an elevated integration experience and allows your sales and marketing teams to work side-by-side on one platform.

EDITIONS

Available in: All Pardot Editions

Give Users Access to Pardot Lightning App
Admins can enable Pardot in Lightning Experience and assign the required permission to users.

Give Users Access to Pardot Lightning App

EDITIONS

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

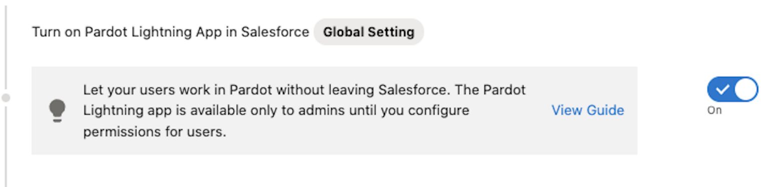
USER PERMISSIONS

To enable Pardot Lightning app:
- Customize Application

To edit app permissions:
- Manage Profiles and Permission Sets

Admins can enable Pardot in Lightning Experience and assign the required permission to users.

1. Verify that your Pardot and Salesforce users are linked. We strongly recommend Salesforce User Sync. See Manage Users with Salesforce User Sync.
2. From Marketing Setup, open the Setup Assistant. Make sure that Pardot is enabled.



3. Give users access to the Pardot connected app.
   a. From Salesforce Setup, in the Quick Find box, enter `Connected`, and then select **Manage Connected Apps**.
   b. From the list, select **b2bma_canvas**.
   c. Click **Manage Profiles** or **Manage Permission Sets** to assign the connected app to users who need access to Pardot Lightning app.
4. Assign the Account Engagement User, Sales Cloud User, Service Cloud User, or CRM User permission set. Review the Pardot Lightning App requirements for more information on permission set options.
   a. From Marketing Setup, in the Quick Find box, enter `Permission Sets`, then select **Account Engagement User**, **Sales Cloud User**, **Service Cloud User**, or **CRM User** from the list.
   b. Click **Manage Assignments**.
   c. Click **Add Assignments** and choose all users who need access to Pardot Lightning app.

   Note: If you'd rather use a custom permission set, create and assign one with the 'Allow access to all Pardot features' app permission. For maximum flexibility, don't choose a license for the new permission set. To access Pardot Lightning App, users still need the Account Engagement User. Sales Cloud User, Service Cloud User, or CRM User permission set license.
5. Make Pardot Lightning app visible to profiles.

a. From Salesforce Setup, in the Quick Find box, enter `App Manager`, and then select **App Manager**.
b. Find Pardot app with the App Type `Lightning`, and then edit it.
c. Click **User Profiles**, and then select all profiles that need access to the app.

After the app is enabled, it appears in the App Launcher for all users with a Sales Cloud, Service Cloud, or CRM user seat who have the app permission assigned.

TRACK PROSPECT ENGAGEMENT IN SALESFORCE

Your campaigns track valuable engagement data that can tell you how well your marketing assets resonate with your customer base. When you collect all of the activity types and metrics in one place, you have a collection of Pardot features called Engagement History. Decide what data is most valuable to you and your users, and surface it throughout Salesforce.

Engagement History is an umbrella term for a variety of features–engagement metrics overviews, engagement activity feeds, and data visualization.

Note: Engagement History Dashboards aren't supported in Pardot Sandboxes.

EDITIONS

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

Add the Matched Leads Lightning Component

Use the Matched Leads Lightning component to find and convert engaged leads from an account record. The component lists the most relevant account leads ordered by level of engagement.

Comparison of Engagement History Features

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

Add the Matched Leads Lightning Component

Use the Matched Leads Lightning component to find and convert engaged leads from an account record. The component lists the most relevant account leads ordered by level of engagement.

1. From Setup, in the Quick Find box, enter `Lightning App Builder`, and then select **Lightning App Builder**.
2. Select the Account page where you want to add the component, and click **Edit**.
3. In the Components list, enter `Matched Leads`, and then select **Matched Leads**.
4. Drag the **Matched Leads** component where you want it to appear in the page layout.
5. Save your work.
6. To specify who can use the page layout, click **Activation**, and then enter the assignment details.

EDITIONS

Lightning App Builder available in: both Salesforce Classic and Lightning Experience

Lightning Home and utility bar pages available in: Lightning Experience

Lightning app and record pages available in: both the Salesforce mobile app and Lightning Experience

Email application pane pages available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To add the Matched Leads component:

- Customize Application

Comparison of Engagement History Features

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

Note:

- All Engagement History components require a CRM User, Sales Cloud User, or Service Cloud User permission set.
- The majority of Engagement History components are available with all Pardot editions. Engagement History Dashboards require Growth, Plus, Advanced, or Premium edition.
- Components using the List Emails object include automated emails from Engagement Studio, completion actions, and automation rules. They don't include operational emails.

USER PERMISSIONS

To use Engagement History:

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

- Objects marked in this table with an asterisk (*) show engagement history data by default.

Feature	Available On...	Data Storage	Prerequisites
Metrics Fields	• Campaign • Marketing Link* • Marketing Form* • Landing Page* • List Email	Salesforce	• Connected Campaigns • Field-level security: Access to engagement history metrics
Related List (Marketing Assets)	Campaign	Salesforce	• Connected Campaigns
Related List (Activities)	• Lead • Contact • Account • Person Account • List Email • Marketing Link* • Marketing Form* • Landing Page*	Pardot	• Logged in to Pardot via Salesforce SSO
Engagement History Metrics Lightning Component	Campaign	Salesforce	• Connected Campaigns
Engagement History Custom Lightning Component	• Lead • Contact • Person Account	Pardot	• Logged in to Pardot via Salesforce SSO
Engagement History Dashboard Lightning Component	• Campaign • Account • Lead • Contact • Person Account • Opportunity	CRM Analytics platform This data is updated every 8 hours.	• Pardot permission set • Connected Campaigns (for a dashboard on campaign records only)

MAP PARDOT AND SALESFORCE FIELDS

To make sure Pardot and Salesforce share data properly, edit your lead and contact page layouts in Salesforce and map Salesforce and Pardot fields.

EDITIONS

Available in: All Pardot Editions

Map Pardot Custom Lead Fields to Contact Fields

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

Add Standard Pardot Fields to Lead and Contact Pages

To get a full view of your customer, you can add marketing engagement data to your lead and contact records. Use default Pardot fields to add data to your lead and contact page layouts.

Create Custom Prospect Fields

When Pardot's default fields don't capture the prospect data you need, create your own custom fields. You can map and sync your custom fields with the CRM.

Map Salesforce and Pardot Custom Fields

To allow syncing, map prospect and account custom fields.

Show Pardot Data in Salesforce

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

Map Pardot Custom Lead Fields to Contact Fields

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

USER PERMISSIONS

To map lead fields:

- Customize Application (in Salesforce)

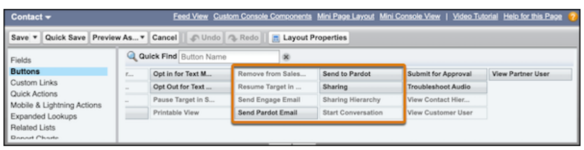
Important: Do not map the Pardot URL lead field and Pardot URL contact field. Mapping these fields to each other creates duplicate prospects and breaks Visualforce pages.

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

Add Standard Pardot Fields to Lead and Contact Pages

To get a full view of your customer, you can add marketing engagement data to your lead and contact records. Use default Pardot fields to add data to your lead and contact page layouts.

1. Find the Lead or Contact page layout.
   - If you're using Lightning Experience, from Setup, in the Quick Find box, enter `Object Manager`, and then select **Object Manager**. Click the name of the object (Lead or Contact) that you want to manage, and scroll to the Page Layouts section.
   - If you're using Salesforce Classic, from Setup, in the Quick Find box, enter the object name (Lead or Contact), and then select **Page Layouts**.
2. Open the layout that you want to edit.
3. In the Page Layout Builder, select **Fields**, and then scroll to find the Pardot fields.
4. Drag the fields onto your layout.
5. To add Pardot buttons to the layout, select **Buttons**, and then drag the buttons to your layout.



6. Save your work.
7. To preview the updated page layout, navigate to a lead or contact record, and then confirm that the selected fields or buttons appear.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Page layouts available in: all editions

Creation and deletion of page layouts available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To add standard fields:
- Customize Application

Create Custom Prospect Fields

When Pardot's default fields don't capture the prospect data you need, create your own custom fields. You can map and sync your custom fields with the CRM.

1. Open the Prospect Fields page.
   - In Pardot, select **Admin** > **Configure Fields** > **Prospect Fields**.
   - In the Lightning app, select **Pardot Settings** > **Object and Field Configuration** > **Prospect Fields**.
2. Click **+ Add Custom Field**.
3. Name the field. The name is used internally for identification, and is not visible to prospects.
4. Don't edit Custom Field ID. This ID is not visible to prospects.
5. Configure field settings.
6. When finished, click **Create custom field** to save.

EDITIONS

Available in: All Pardot Editions

USER PERMISSIONS

To create custom fields:
- Pardot Administrator role

Map Salesforce and Pardot Custom Fields

To allow syncing, map prospect and account custom fields.

USER PERMISSIONS

To map fields:
- Pardot Administrator role

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

Keep these considerations in mind when mapping fields.

- If a Salesforce field is already mapped, it doesn't display in the dropdown.
- Custom field mapping isn't case sensitive. For example, the two custom fields Account_Type and account_type on the contact record must map to the same field on the prospect record.
- To map a custom field on both the lead object and contact object to the same Pardot field, the API name of the Salesforce fields must be identical.
- Pardot fields don't sync with lookup or geolocation Salesforce field types.
- Don't map number type fields to Salesforce phone type fields. Phone fields contain non-number characters and don't sync correctly. Instead, map Salesforce phone type fields to text type fields.

1. In Pardot, open the custom field for editing.
2. From the Salesforce Field Name dropdown, choose the field you want to map.
3. (Optional) Enable **Keep this field's type and possible values (for dropdowns, radio buttons, checkboxes) in sync with the CRM**. This setting syncs field setting changes from Salesforce to Pardot.
4. (Optional) Edit sync behavior.

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

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

Show Pardot Data in Salesforce

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

USER PERMISSIONS

To customize page layouts:
- Customize Application (in Salesforce)

1. Open your lead or contact page layout for editing.
2. Add the Pardot custom fields to the page layout.
   a. Add a section to the layout.
   b. Name the section.
   c. Select **2-Column**, and click **OK**.
   d. Return to the Fields section of the drag-and-drop editor, and scroll right to locate the custom fields.
   e. Drag all the custom fields in to the new section.
   f. (Optional) Drag the Google Analytics fields to the section.
3. Add Pardot activities and list membership to your layout.
   a. Add a section to the layout.
   b. Name the section.
   c. Select **1-Column**, and click **OK**.

   d. In the editor, scroll to the Visualforce Pages section.
   e. Drag Pardot Activities, Pardot List Membership, and Pardot Social Data to the new section.

4. Save your layout when finished.

Repeat these steps for lead and contact page layouts.

MANAGE AND UNPAUSE THE SALESFORCE-PARDOT CONNECTOR

New Pardot accounts come equipped with Version 2 of the Salesforce-Pardot connector, which is created in a paused state. There are a few things we recommend you have set up before you unpause the connector and begin syncing data with Salesforce.

EDITIONS

Available in: All Pardot Editions

Set Up Connected Campaigns
: It's a great idea to connect your Pardot and Salesforce campaigns. You can save time, reduce clutter, and get access to valuable cross-product features. For example, work with campaign influence attribution models, Engagement History, and Pardot Einstein Campaign Insights for a complete view of your business. Plus, you can work with Pardot prospects and data without leaving Salesforce.

Define Marketing Data Sharing Rules
: If you're a Pardot Advanced or Premium customer, you can use Marketing Data Sharing rules to define what data you want to sync with Salesforce objects.

Configure and Unpause the Salesforce-Pardot Connector in Pardot (Connector v2)
: Version 2 of Salesforce-Pardot connector is created in a paused state. A Pardot admin must configure the connector and unpause it to begin syncing data.

SEE ALSO:

Salesforce-Pardot Connector Settings

Set Up Connected Campaigns

It's a great idea to connect your Pardot and Salesforce campaigns. You can save time, reduce clutter, and get access to valuable cross-product features. For example, work with campaign influence attribution models, Engagement History, and Pardot Einstein Campaign Insights for a complete view of your business. Plus, you can work with Pardot prospects and data without leaving Salesforce.

EDITIONS

Available in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions with any Pardot Edition

SEE ALSO:

Connected Campaigns Implementation Guide

Define Marketing Data Sharing Rules

If you're a Pardot Advanced or Premium customer, you can use Marketing Data Sharing rules to define what data you want to sync with Salesforce objects.

EDITIONS

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

Note: Sometimes, assigned users have more access to CRM data in Pardot than they do in Salesforce. To restrict access, manually create sharing rules that match your Marketing Data Sharing rules and apply them to the Pardot marketing user group.

SEE ALSO:

Marketing Data Sharing

Configure and Unpause the Salesforce-Pardot Connector in Pardot (Connector v2)

Version 2 of Salesforce-Pardot connector is created in a paused state. A Pardot admin must configure the connector and unpause it to begin syncing data.

1. Open the Salesforce connector page.
   - In Pardot, select **Admin** and then select **Connectors**. Click next to the Salesforce connector, and select **Edit**.
   - In the Lightning app, select **Pardot Settings** and then **Connectors**. Click next to the Salesforce connector, and select **Edit Settings**.
2. Review your connector settings.
3. To begin syncing, click the icon, and select **Unpause**.

   Note: The connector uses the integration user to sync. If you want to selectively sync records, change the connector user to a user with the appropriate permissions or set up Marketing Data Sharing before unpausing.

Trigger the Initial Prospect Sync

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

Trigger the Initial Prospect Sync

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

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

ADD A TRACKER DOMAIN

Add tracker domains using CNAME records for link rewriting and vanity URLs.

USER PERMISSIONS

To manage domains in Pardot:

- Pardot Administrator role

Note: Work with your IT team or hosting provider to complete these steps.

1. Open the Domain Management page.
   - In Pardot, select **Admin** and then select **Domain Management**.
   - In the Lightning app, select **Pardot Settings** and then **Domain Management**.
2. Scroll to Tracker Domains, and click **+ Add Tracker Domain**.
3. Work with your IT team or hosting provider to set up a CNAME record for the subdomain that you want to use. Set the record to point to go.pardot.com.
4. Choose whether to validate a parent domain or the root domain directly. Your IT team or hosting provider can help you add validation keys to your domain.
   - To validate a parent domain, copy the domain's validation key from the Tracker Domain table. Set up a TXT record with an empty host (or the [@] symbol), and then paste the domain's validation key into the TXT record. For example, if you use `go.marketing.yourdomain.com` as a tracker domain, the validation key is accepted in either `marketing.yourdomain.com` or `yourdomain.com`.
   - To validate the root domain, open the Tracker Domain table, click **Tools**, then click **Download Validation File**. Add the downloaded file to the root domain. For example, if your tracker domain is www2.example.com and the validation file's name is `marketing_1234.txt`: https://example.com/marketing_1234.txt or https://www.example.com/marketing_1234.txt.
5. Wait for your DNS to propagate, which can take up to 24 hours.
6. From the Tracker Domain table, click the gear icon for your domain, and click **Validate**.

By default, the first validated domain is set to primary. To use a different primary validated tracker domain, click the gear icon and select **Set as primary**.

You can designate one primary tracker domain per business unit, and it must be unique across all your business units. Each tracker domain counts toward the limit, even if it's based on the same domain.

IMPLEMENT TRACKING CODE FOR FIRST-PARTY TRACKING

Each Pardot campaign has a unique tracking code that tracks visitor and prospect activity when added to your web pages.

1. Open the Domain Management page.
    - In Pardot, select **Admin** and then select **Domain Management**.
    - In the Lightning app, select **Pardot Settings** and then **Domain Management**.
2. Scroll to the Tracking Code Generator and select the domain you want to generate code for.
3. (Optional) Override the default campaign.
4. Copy the code.
5. In your web page HTML, paste the campaign tracking code before the close body tag (`</body>`).

EDITIONS

Available in: All Pardot Editions

USER PERMISSIONS

To view tracking code:
- Pardot Administrator or Marketing role

IMPLEMENT DKIM EMAIL AUTHENTICATION

To achieve the best deliverability with Pardot, implement mail authentication. Pardot uses the two most common standards: SPF and DKIM. SPF authentication is configured for you by default. Work with your IT team to implement DKIM authentication.

EDITIONS

Available in: All Pardot Editions

USER PERMISSIONS

To check and verify DNS entries in Pardot:

- Pardot Administrator role

Generate DomainKeys

In Pardot, generate DomainKeys for each domain you want to send email from.

1. Open the Domain Management page.
   - In Pardot, select **Admin** and then select **Domain Management**.
   - In the Lightning app, select **Pardot Settings** and then **Domain Management**.
2. Click **+ Add New Domain**.
3. Enter the domain you want to send emails from.
4. Click **Create domain**.
5. Click **Expected DNS Entries**.
6. Make note of the Domainkey_Policy and DomainKey values. You add these values to your DNS records.

Repeat these steps for each domain that you want to authenticate for email sending.

Add and Verify DKIM Entries

Add TXT records for DKIM to your sending domain’s DNS record. Then in Pardot, verify your DKIM records to complete the email authentication setup. DNS entries can take up to 24 hours to appear everywhere.

Note: Instructions for adding records to your DNS vary by provider. This task also requires editing your domain’s DNS records. If needed, ask your IT team or DNS provider for help.

To add DKIM records, first add a TXT record, and then paste both the Domainkey_Policy and DomainKey value that you generated in Pardot.

1. Open the Domain Management page.
   - In Pardot, select **Admin** and then select **Domain Management**.
   - In the Lightning app, select **Pardot Settings** and then **Domain Management**.

2. Next to your domain, click **Check DNS Entries**.

If your records were added correctly, your domains show as verified. If you have errors, click an error link for more information.

NEXT STEPS

After you complete the technical setup for Pardot, you can set up any additional Pardot features you need. At this point, you can also bring in your marketing team to start using Pardot.

Create and Customize Marketing Assets

After initial setup is complete, bring in your marketing team to get started creating assets and using Pardot. Take advantage of Pardot's folders and file hosting capabilities, and build out forms, landing pages, templates, and automations for your business.

Recommended Features and Add-Ons

Here are some features we recommend for getting the most out of Salesforce Pardot. Depending on your Pardot edition, these features are available as paid add-ons.

For more options on customizing the Salesforce-Pardot integration, check out Connecting Pardot and Salesforce.

- **Business to Business Marketing Analytics Plus (B2BMA+):** B2BMA+ is a growing collection of intelligent marketing tools for B2B marketers. The Account-Based Marketing and Marketing Campaign Intelligence apps help you explore your data and identify improvements with Einstein Discovery.
- **Salesforce Engage:** Salesforce Engage lets marketing share its content with sales to boost your company's selling power. Sales reps can use marketing-approved email templates to contact prospects at the right moment and track the effectiveness of the messages in Salesforce.
- **Sandboxes for Pardot:** Use Sandboxes for Pardot to test configuration changes before implementing them in your production account. A Sandbox for Pardot is a Pardot Business Unit that is provisioned from a Salesforce sandbox. Sandboxes for Pardot are available to Pardot Advanced and Premium customers, and as a paid add-on to Pardot Plus customers.

SEE ALSO:

B2B Marketing Analytics Plus

Salesforce Engage

Create a Sandbox for Pardot