Salesforce-Pardot Connector v2 Implementation Guide

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@salesforcedocs

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SETTING UP A SALESFORCE-PARDOT CONNECTION FOR ACCOUNTS PURCHASED AFTER FEBRUARY 11, 2019

For Pardot accounts purchased after February 11, 2019, only a Salesforce admin from within Salesforce can install and enable Pardot. To complete setup, the Salesforce admin appoints a Pardot admin who can configure the Pardot account. A Pardot admin doesn't have to be a Salesforce admin. Before enabling Pardot and configuring the admin account, review these prerequisites.

Tip: For easier navigation, download the PDF version of these instructions.

- Before you enable Pardot, grant the user who you're assigning as the Pardot admin access to the Pardot Lightning app. The admin sets up Pardot from this Lightning app. See Pardot in Lightning Experience.
- After enabling Pardot, the assigned Pardot admin is sent an email with the next steps. It usually takes a few minutes to receive the email.

Considerations for Using the Salesforce-Pardot Connector

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

General

- You can have only one Salesforce connector in Pardot.

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

Connector Version 2

The following applies when using Connector version 2.

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

Syncing Fields Between Salesforce and Pardot

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

Mapping Pardot Users to Salesforce Users

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

Syncing Prospects

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

Syncing Prospect Activity and Email

- Pardot activities, such as page views, form completions, site searches, and emails, appear in the Prospect Activities window in the prospect's CRM record. However, only emails are created as a CRM activity or task.

- Pardot logs an email in the activity section of the CRM record when sending out a list email or a one-to-one email using the Pardot plug-in.
- Email syncing is controlled in your connector settings.

Syncing Opportunities

- Opportunity activities are included in the default scoring (+50 points for created opportunity, –100 points for lost opportunity). When the connector is enabled, prospect scores update accordingly. Score updates can affect automation or lead assignment rules already in place.
- If you do not use opportunities in Salesforce, Pardot support can disable opportunity syncing.
- If Salesforce has duplicate records, the activity iframe appears in all the records. However, the Pardot data fields appear only in the record that Pardot is syncing with.

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

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

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

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

When a prospect is created and it meets your criteria to begin syncing, a record is created based on your connector's settings.

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

Choose a Sync Method

When the integration user is set as the connector user, the connector syncs all records for objects that sync between Pardot and Salesforce. If you want to sync a subset of records, use Marketing Data Sharing to select the records to sync. Use the included integration user, or configure your own connector user.

When using Marketing Data Sharing, we recommend that you use the integration user instead of configuring your own connector user. The integration user is preconfigured with the necessary permissions and doesn't require an additional license.

Pardot Integration User

The Pardot integration user is an automatically provisioned user that connects to Salesforce to sync data. Pardot is the only app that can log in to Salesforce via the integration user, and only after a Salesforce admin has finished the Pardot setup.

Configure the Connector User

The connector user is a user that facilitates data syncing. These tasks apply only to accounts that aren't using the Pardot integration user.

Pardot Integration User

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The Pardot Connected App uses a secure authentication method that lets the Pardot application servers authenticate to Salesforce. The connected app contains the public half of a secure key pair provisioned to Pardot. See OAuth 2.0 JWT Bearer Flow for Server-to-Server Integration.

Here are a few things to note about the integration user.

- It's named B2BMA Integration, with the username b2bmaintegration@<org-id>.ext. The profile and integration usernames both include B2BMA, but they aren't related to B2B Marketing Analytics.
- It's provisioned with the B2BMA Integration User profile, which grants the user permission to view and modify data that Pardot syncs with Salesforce.
- It doesn't use a standard Salesforce user license.
- It doesn't have a password, and can't log in to Salesforce directly.
- Changes that happen as the result of the Salesforce-Pardot integration are attributed to the integration user. You can easily determine which updates to Salesforce objects are due to the integration, and which are due to user actions.
- The integration user authenticates to Salesforce via the Pardot Integration Connected App that is installed during Pardot setup.
- The integration user has campaign access but doesn't require the Marketing User permission in Salesforce.

Configure the Connector User

The connector user is a user that facilitates data syncing. These tasks apply only to accounts that aren't using the Pardot integration user.

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

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

Assign the Pardot Connector User Permission Set

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

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

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

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

1. From Marketing Setup, enter `Users` in the Quick Find box, then select **Users**.

USER PERMISSIONS

To assign permission sets:
- Assign Permission Sets (in Salesforce)

To edit object permissions:
- Manage Profiles and Permission Sets

  AND

  Customize Application

  (in Salesforce)

2. Select the connector user.
3. Scroll to Permission Set Assignments, and click **Edit Assignments**.
4. In the Available Permission Sets box, click **Pardot Connector User** to highlight it, then click the **Add** arrow button.
5. Save the user.

Assign Object Permissions to the Connector User

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

Note: How you apply these permissions is up to you. For more information about permissions, see the User Permissions documentation.

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

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

Note: To streamline future troubleshooting assign the View Setup and Configuration to your connector user.

Step 1: Install the Package and Enable Pardot

To share prospect and opportunity data, a Salesforce admin can install the Pardot AppExchange package. If you purchased Pardot after February 11, 2019, you enable the package from Salesforce.

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.

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.

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.

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

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.

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.

Step 2: Configure Salesforce for the Salesforce-Pardot Connector

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

Map Pardot Custom Lead Fields to Contact Fields

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

Show Pardot Data in Salesforce

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

Add Custom Buttons to Salesforce Page Layouts

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

Adding Pardot Standard Actions to Salesforce

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

Add Scoring Category Scores to Page Layouts

Update page layouts to include scoring category fields on lead and contact records.

Give Users Access to Pardot Data in Salesforce

Apply the necessary permissions to any set included with the AppExchange package to any user who accesses or uses Pardot data in Salesforce.

Map Pardot Custom Lead Fields to Contact Fields

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

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

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

USER PERMISSIONS

To map lead fields:
- Customize Application (in Salesforce)

Show Pardot Data in Salesforce

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

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

USER PERMISSIONS

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

Add Custom Buttons to Salesforce Page Layouts

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

Note: Users must be SSO-enabled to use Send to Pardot.

USER PERMISSIONS

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

1. Open your lead or contact page layout for editing.
2. In the palette, scroll to the Buttons category (Classic) or to Mobile & Lightning Actions (Lightning Experience).
3. Select the **Send to Pardot** and **Send Pardot Email** buttons, and drag them to the Custom Buttons box (in Classic). To add the buttons to Lightning Experience, drag them to the Salesforce Mobile and Lightning Experience Actions section.
4. Save your page layout when finished.

Repeat these steps for lead and contact page layouts.

Adding Pardot Standard Actions to Salesforce

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

Add actions to record pages in Salesforce in the Page Layout of the standard object such as the Lead or Contact object. To add actions to list views, customize a search layout from the management settings for the appropriate object.

USER PERMISSIONS

To create custom buttons:
- Customize Application

Note: To use these buttons, users must be assigned a Sales Cloud, Service Cloud, or CRM User permission set. These buttons don't create prospects unless you enable the Automatically create prospects in Pardot if they're created in Salesforce setting for the Salesforce-Pardot connector.

Action	Availability in Salesforce
Add to Pardot List	Object Page Layouts • Lead • Contact List View Objects • Lead • Contact
Add to Engagement Studio List	Object Page Layouts • Lead • Contact List View Objects • Lead • Contact

Add Scoring Category Scores to Page Layouts

Update page layouts to include scoring category fields on lead and contact records.

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

EDITIONS

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

USER PERMISSIONS

To customize page layouts:

- Customize Application (in Salesforce)

Give Users Access to Pardot Data in Salesforce

Apply the necessary permissions to any set included with the AppExchange package to any user who accesses or uses Pardot data in Salesforce.

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

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

USER PERMISSIONS

To assign permission sets:

- Assign Permission Sets (in Salesforce)

Step 3: Configure Pardot

To wrap up connector set up, map custom fields and users, test the connector, and perform an initial sync.

Map Salesforce and Pardot Custom Fields
To allow syncing, map prospect and account custom fields.

Test the Salesforce Connector
After you set up the Salesforce Connector, you can test it to make sure that it syncs properly.

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

Map Salesforce and Pardot Custom Fields

USER PERMISSIONS

To map fields:
- Pardot Administrator role

To allow syncing, map prospect and account custom fields.

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.

Test the Salesforce Connector

After you set up the Salesforce Connector, you can test it to make sure that it syncs properly.

Test	Steps
Sync a new prospect with an existing lead or contact record	1. Create a prospect who exists in Salesforce. 2. To test manual sync, open the prospect record and click Sync with CRM. 3. To test the automatic sync, wait 10–15 minutes to see if the connector initiates a sync.
Sync a new prospect who doesn't exist in Salesforce	1. Create a prospect who doesn't exist in Salesforce. 2. Create a lead or contact record in Salesforce with the same email address. 3. From the prospect record, click Sync with CRM or wait 10–15 minutes to see if the connector initiates a sync.
Assign a prospect	1. Create a prospect who doesn't exist in Salesforce. 2. Assign the prospect to a Sales user.

Test	Steps
	3. From the prospect record, click Sync with CRM or wait 10–15 minutes to see if the connector initiates a sync.
Create a prospect from a Salesforce record	This test applies only if you have this connector setting enabled: Automatically create prospects in Pardot if they're created in Salesforce. 1. Create a lead or contact record. If your business unit doesn't allow multiple prospects with the same email address, use an email that doesn't exist in Pardot yet. 2. Wait 10–15 minutes to see if a prospect record is created.

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.