salesforce

Marketing Cloud Advertising and Account Engagement Implementation Guide

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CONTENTS

GETTING STARTED WITH MARKETING CLOUD ADVERTISING AND ACCOUNT ENGAGEMENT

Marketing Cloud Advertising and Account Engagement are both powerful tools built for marketers. Connecting them helps maximize your marketing efforts by giving prospects and customers a more personalized experience across channels. After you connect the apps, Account Engagement prospect data is funneled into an Advertising Audience so you can better tailor your social media marketing.

- Advertising is part of Marketing Cloud, but can be purchased as a standalone product. This process works the same whether you have only Advertising or full Marketing Cloud access.
- You can repeat this process to use Account Engagement prospect data for multiple Advertising Audiences.
- Connection setup requires you to complete tasks in three places: Account Engagement, Salesforce, and Marketing Cloud (or standalone Advertising).
- Depending on your permissions and the structure of your org, it's possible you need more than one person to complete this setup. Check out the implementation overview section in this guide for a printable planning worksheet.
- Review the requirements in the Implementation Overview section of this guide and make sure you plan for any resources you need before you begin.
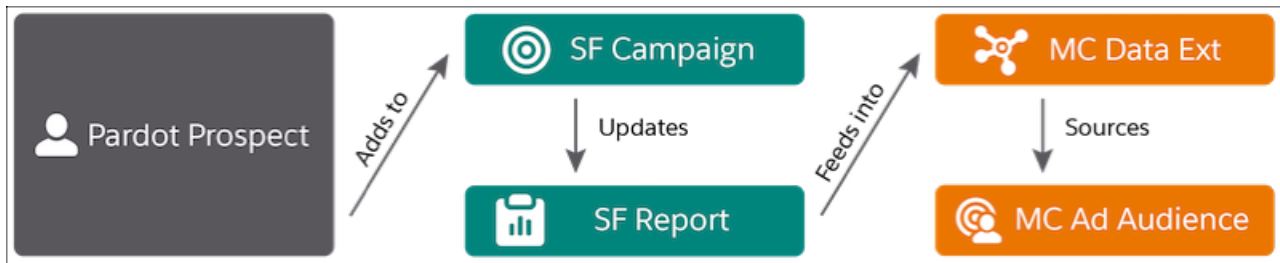
IMPLEMENTATION OVERVIEW

After you complete the setup process, prospect data from Account Engagement is fed into Marketing Cloud Advertising via Salesforce. The setup process outlined in this guide facilitates the flow of data from Account Engagement to Salesforce, and then from Salesforce to Marketing Cloud Advertising.

This graphic gives a high-level overview of the data flow after setup is complete. A Pardot prospect is added to a Salesforce campaign, which updates a Salesforce report, which is used to create a Marketing Cloud data extension. The data extension is the source for an Advertising Audience.

Requirements
Before you begin the setup process, review the requirements for connecting Marketing Cloud Advertising and Account Engagement.

Implementation Worksheet
You can print this worksheet to help you plan and decide how to handle each task. You must complete the tasks in Salesforce and Account Engagement before you can complete the setup in Marketing Cloud.

Requirements

Before you begin the setup process, review the requirements for connecting Marketing Cloud Advertising and Account Engagement.

You must have a connected third-party social account equipped for advertising, plus these system requirements:

Salesforce	Account Engagement	Marketing Cloud
• Permission to view, add, and edit campaign objects	• Marketing user permissions • A verified Salesforce connector	• Full access to Marketing Cloud OR access to Marketing Cloud Advertising • Marketing Cloud Connect enabled

Salesforce	Account Engagement	Marketing Cloud
		• A Marketing Cloud File Transfer Protocol (FTP) account and be an FTP user

SEE ALSO:

Connect the Clouds with Marketing Cloud Connect

Marketing Cloud FTP Accounts

Implementation Worksheet

You can print this worksheet to help you plan and decide how to handle each task. You must complete the tasks in Salesforce and Account Engagement before you can complete the setup in Marketing Cloud.

Salesforce Tasks

Task	Owner	Notes
Create a campaign		
Create a report		

Account Engagement Tasks

Task	Owner	Notes
Define how prospects are added to the Salesforce campaign		Choose from: completion actions, segmentation rules, automation rules, page actions, or an Engagement Studio program.

Marketing Cloud Tasks

Task	Owner	Notes
Create a data import in Email Studio		
Create an automation in Automation Studio		
Create an Advertising Audience in Marketing Cloud Advertising		

SALESFORCE SETUP

In Salesforce, create a campaign to add Account Engagement prospects to. Then, create a report based on that campaign.

Create a Salesforce Campaign
First, create a campaign in Salesforce.

Create a Salesforce Report
After you create your campaign, build a report for your campaign in Salesforce.

Create a Salesforce Campaign

First, create a campaign in Salesforce.

1. From the Campaigns tab, click **New**.

2. Select a record type, then click **Next**.

3. Name your campaign, set the status to **In Progress**, the type to **Social Media**, and leave the start and end dates blank.

4. Select **Active**, and then click **Save**.

Create a Salesforce Report

After you create your campaign, build a report for your campaign in Salesforce.

1. From the Reports tab, click **New Report**.

2. Select **Campaigns with Campaign Members** as the report type, then click **Continue**.

3. Click 🖊 and name your report.

4. On the Outline tab, select **Email** as a column for your report.

5. Apply any other desired columns. If you plan to use Facebook or Google Advanced Match capabilities for your Advertising Audience, include any information you want to match.

6. Click the **Filters** tab and apply these filters:

   a. Show me: My active campaigns

   b. Campaign Name equals the name of the campaign you created in the previous section.

7. Apply any other desired filters. We recommend you apply a date filter such as Member Status Update Date to limit the report to campaign members from a specific time frame.

8. Click **Save & Run**.

EDITIONS

Available in: Lightning Experience

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

Available in: Enhanced Folder Sharing

USER PERMISSIONS

To create, edit, and delete reports in private folders:
- Create and Customize Reports

To create, edit, and delete reports in public and private folders:
- Report Builder OR Report Builder (Lightning Experience)

ACCOUNT ENGAGEMENT SETUP

In Account Engagement, choose how prospects are added to the campaign you created in Salesforce. You can add prospects to Salesforce campaigns via completion actions, segmentation rules, automation rules, page actions, or Engagement Studio program actions.

SEE ALSO:

Completion Actions

Segmentation Rules

Automation Rules

Page Actions

Engagement Program Actions

MARKETING CLOUD SETUP

The setup in Marketing Cloud involves three separate tasks: create a data import, an automation, and an Advertising Audience. The tasks in this section are the same regardless of whether you have full access to Marketing Cloud or have purchased only Marketing Cloud Advertising.

📝 **Note:** To complete the setup in Marketing Cloud, make sure you have an enabled File Transfer Protocol (FTP) account and that you're an FTP user. Check out Marketing Cloud FTP accounts for more info.

Create a Data Import in Email Studio
Create a data import to transfer your Salesforce report data into Marketing Cloud.

Create an Automation in Automation Studio
Use an automation to sync your Salesforce report data to Marketing Cloud.

Create an Audience in Marketing Cloud Advertising
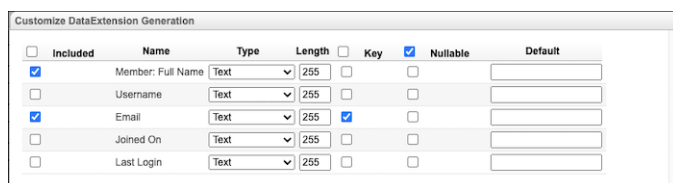Create an Advertising Audience based on your Salesforce report data extension.

Create a Data Import in Email Studio

Create a data import to transfer your Salesforce report data into Marketing Cloud.

1. In Email Studio, hover over Interactions and click **Import**.
2. Click **Create**.
3. Name your data import and fill out the required fields. For File Location, choose **Salesforce Objects & Reports**.
4. Click **Report**, then click **Select**.
5. Check the box for your Salesforce report, and click **OK**.
6. Under Included, select the fields you want to sync from Salesforce. Under Key, check a field to use as an identifier for prospects in your Advertising Audience, such as Email.

	Included	Name	Type	Length		Key	☑	Nullable	Default
	☑	Member: Full Name	Text	255		☐		☐	
	☐	Username	Text	255		☐		☐	
	☑	Email	Text	255		☑		☐	
	☐	Joined On	Text	255		☐		☐	
	☐	Last Login	Text	255		☐		☐	

Customize DataExtension Generation

7. Click **Save Config** to return to the New Import screen.
8. Click **Save**.

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SEE ALSO:

    File Naming Patterns

Create an Automation in Automation Studio

Use an automation to sync your Salesforce report data to Marketing Cloud.

1. In Automation Studio, click **New Automation**.

2. Click **Untitled Automation** and enter a name for your automation, then click **Done**.

3. Click **Schedule**, drag it into your workflow under Starting Source, and click **Configure** to set the data sync frequency.

   > 💡 **Tip:** We recommend syncing once a day to ensure ads are relevant to your audience.

4. Click **Done**.

5. Click **Import File**, drag it into your workflow as Step 1, and click **Choose**.

6. Select the data import for your Salesforce report you created in Email Studio, then click **Done**.

7. Click **Save**. To confirm that everything is working as expected, click **Run Once**.

8. Under Schedule, click **Active**, and then click **Activate** in the confirmation modal.

EDITIONS

Available in: Marketing Cloud or Marketing Cloud Advertising with Marketing Cloud Connect enabled.

USER PERMISSIONS

To create an automation:
- Marketing Cloud Administrator or Channel Manager role with Create, Edit, Execute permission

Create an Audience in Marketing Cloud Advertising

Create an Advertising Audience based on your Salesforce report data extension.

1. In Marketing Cloud Advertising, navigate to Advertising Audiences.

2. Click **+ Create Audience**.

3. Enter a name for the audience and choose a destination ad network.

4. Select an ad account.

5. Click **Configure**.

6. On the configuration page, click **Data Extension**.

7. Under Synchronized Data Extensions, select the data extension you created for your Salesforce report.

Create New Audience

Name *	LenoxSoft Events
	This is the name that will be shown in Advertising Audiences and on Facebook or Twitter
Description	
Onboarding Partner	None
Destination *	Facebook
Ad Account	LenoxSoft

Cancel   Save & Close   Configure

8. Click **Save**.

After you configure the audience, setup is complete. The audience updates as Account Engagement prospects are added to your Salesforce campaign. Processing times vary depending on the volume of data.

SEE ALSO:

Advertising Audiences Roles and Permissions