Connected Campaigns Implementation Guide

Salesforce, Summer '23

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CONNECT ACCOUNT ENGAGEMENT AND SALESFORCE CAMPAIGNS

If you're new to Salesforce and Account Engagement, the Connected Campaigns feature is already partially enabled. Connect campaigns to save time, reduce clutter, and access valuable cross-product features. For example, work with Campaign Influence attribution models, Engagement History, and Einstein Campaign Insights for a complete view of your business. Plus, you can work with prospects and engagement data without leaving Salesforce.

To streamline the way that you provide multifaceted campaign data to sales and marketing teams, connect your Salesforce and Account Engagement campaigns. As a prospect interacts with the marketing assets on a Account Engagement campaign, metrics are pushed to its equivalent Salesforce record. From there, marketers can track influence, and sales users can clearly see the prospect's journey to becoming an opportunity.

> 📝 **Note:** If you purchased Account Engagement after March 22, 2019, Connected Campaigns is partially enabled by default. You can create campaigns in Salesforce only and have access to Engagement History features.

Play a Demo: ▶ Enable Connected Campaigns (English Only)
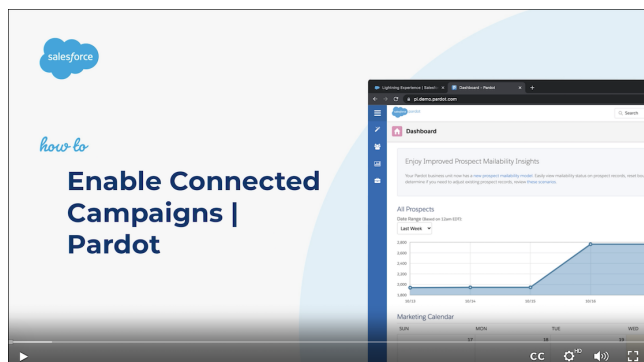
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Considerations for Connecting Campaigns

If you're setting up Connected Campaigns in a business unit with existing campaigns, keep these considerations in mind.

Before You Start

- Create an equivalent Salesforce campaign for each Account Engagement campaign, including the default Account Engagement campaigns Website Tracking, Email Plug-In, and Salesforce Sync.
- Organize and dedupe existing Account Engagement campaigns.
- Create the Salesforce record types that you plan to use when syncing campaigns.

Requirements

- Connected Campaigns requires a verified Salesforce connector, a Salesforce login, and an admin to enable the feature.
- For the best experience, we recommend that you don't turn off Connected Campaigns after you turn it on.

About Record Types

- To limit which counterpart campaigns are created in Account Engagement, use record types with Connected Campaigns. In the Connected Campaigns settings, you can deselect record types, if they aren't needed.
- For best performance, use record types to sync only the campaigns that you expect to connect frequently. It takes time to load all the campaigns in the menu that you use to connect Salesforce campaigns—the fewer campaigns to choose from, the better.
- The Master record type is the default record type for new records. To avoid syncing unnecessary Salesforce campaigns, we recommend that you don't choose this record type. Work with your Salesforce admin to create alternate record types.
- To connect more than one Account Engagement business unit to a single Salesforce org, create different campaign record types for each business unit.

After You Connect Campaigns

- Salesforce copies marketing forms, marketing links, and list emails from Account Engagement campaigns to their connected Salesforce campaigns. This data counts against your company's data storage limits.
- The Account Engagement campaign record becomes read-only, so always create campaigns from the Campaigns tab in Salesforce.
- When campaigns are connected, Salesforce replaces the values of these Account Engagement campaign fields, which can't be undone.
  - Name
  - Archive Date (maps to End Date on Salesforce campaigns)
  - Cost
  - Created By
  - Updated By
  - Updated At

EDITIONS

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

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

- Some actions associated with Account Engagement campaigns are removed. The Add Campaign and Connect to CRM Campaign actions no longer appear on the Account Engagement Campaigns tab, and the Account Engagement Campaigns recycling bin is no longer available.

> **Note:** To support Account Engagement features available within Sales Cloud, Salesforce added a user called B2BMA Integration User to all Salesforce customers who also have Account Engagement. This new user is read-only, doesn't affect your Salesforce license usage, and can't access or update data by default. If you choose to opt in to the new Account Engagement features available in Sales Cloud, this user enables campaign and engagement data to be shared and copied between the two systems.

Enable Connected Campaigns

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

> **Note:** Pardot is now known as Marketing Cloud Account Engagement. 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, including in the app itself.

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

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

> **Note:**
> - The B2BMA Integration user doesn't need the Account Engagement Marketing User role to enable and work with Connected Campaigns.
> - Make sure that you create counterpart campaigns in Salesforce for Account Engagement 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 Account Engagement 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 Account Engagement, identify a cut-off date for replication.

1. Open the Connected Campaigns page.
   - In Account Engagement, open **Settings** and click **Edit**. Scroll to Connected Campaigns.
   - In the Lightning app, select **Account Engagement Settings** and then **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.

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 Account Engagement users continue to see the remaining unconnected campaigns, select **Show Unconnected Campaigns**.

Users now manage campaigns only in Salesforce.

Connect Individual Campaigns

You can connect individual Account Engagement and Salesforce campaigns whenever you need to.

1. Open the Account Engagement Campaigns page.

- In Account Engagement, select **Marketing** and then **Campaigns**.

- In the Lightning app, select **Account Engagement Campaigns**. This tab isn't visible by default—an admin must add it.

2. Select the **Unconnected Campaigns** view.

3. For the Account Engagement campaign that you want to connect, click **Connect to CRM Campaign** and then select the associated Salesforce campaign.

Connect Multiple Campaigns at Once

The easiest way to audit and organize your campaigns in bulk is to download our mapping workbook. It contains your campaign names and IDs in three worksheets. Copy and paste values from the workbook tabs to align the campaigns in the Connect tab. Then, upload the completed file.

> ✏️ **Note:** Pardot is now known as Marketing Cloud Account Engagement. 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, including in the app itself.

If you have more than 500 campaigns, it can take some time to download the workbook. We send an email to notify you when the file is available.

Here are a few tools the workbook offers to help you avoid data-entry errors.

- When a campaign has the same name in both apps and you add it to the Connect tab, the worksheet auto-fills the matching campaign.

- When a row is complete, it turns green.

- When a campaign is added to the Connect tab, its corresponding row is highlighted in its original tab, to indicate it's already been mapped.

- The Salesforce record type isn't required to map campaigns, but it's provided for your reference.

- Sometimes, associated campaigns are aligned automatically, so you can skip over them.

- You can upload only 3,000 rows on the Connect tab at one time. Split your import into multiple batches, if needed.

1. Open the Account Engagement Campaigns page.
   - In Account Engagement, select **Marketing** and then **Campaigns**.
   - In the Lightning app, select **Account Engagement Campaigns**. This tab isn't visible by default—an admin must add it.

2. Click **Connect Campaigns with Excel** and download the workbook.

3. In the Pardot tab of the workbook, copy a value from the Name column. Then, paste it into the Pardot Name column of the Connect tab.

4. In the Salesforce tab, copy the associated Salesforce campaign name. Back in the Connect tab, paste the name into the corresponding Salesforce Name field.

5. Delete unused rows from the worksheet.

6. When you're finished aligning all the campaigns you want, upload the file.

EDITIONS

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

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

USER PERMISSIONS

To bulk connect campaigns:
- Account Engagement Administrator role

Connect Existing Campaigns with Workbench

You can use Workbench to connect multiple existing Account Engagement campaigns to new Salesforce campaigns in bulk.

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1. Open the Account Engagement Campaigns page.

   - In Account Engagement, select **Marketing** and then **Campaigns**.

   - In the Lightning app, select **Account Engagement Campaigns**. This tab isn't visible by default—an admin must add it.

2. Click **Bulk Connect Pardot Campaigns to New Salesforce Campaigns**.

   Salesforce exports the file `NewConnectedCampaigns.csv`, which contains a list of your unconnected campaigns.

3. If your org has required custom fields for campaigns, add columns to the CSV file for each field name.

4. Log in to https://workbench.developerforce.com with your Salesforce account credentials.

5. Select **Data** > **Insert**.

6. Select **Object** > **Campaign**.

7. Select **From File**.

8. Click **Choose File**, and open the `NewConnectedCampaigns.csv` file.

9. Click **Next**.

10. Workbench prompts you to map Salesforce campaign fields to the Account Engagement campaign fields in the CSV file. Accept the default mappings. If you added custom field columns to the CSV file, find the field on the left and select the correct CSV column you added.

11. Click **Map Fields**.

    A confirmation page shows the field mappings and the number of new Salesforce campaign records to be created.

12. Click **Confirm Insert**.

Workbench reports the number of campaigns created and any failures. If a campaign fails to create, the reason is listed in the Status column. The newly connected campaigns appear in the Connected Campaigns view on the Account Engagement Campaigns page after a short wait.

When you use Workbench to map campaigns, the field Pardot Campaign ID is added to your records for organization purposes. This field isn't shown on campaigns mapped via other methods, so we don't recommend that you use the field in reports or page layouts.

CAMPAIGN MEMBER SYNC

As you connect your campaigns, decide whether to sync prospects into those campaigns. When you turn on Member Sync for connected campaigns, prospects appear in Salesforce as campaign members.

When using Member Sync, keep these considerations in mind.

To sync campaign members between Account Engagement and Salesforce, turn on Member Sync.

Considerations for Member Sync

When using Member Sync, keep these considerations in mind.

How It Works

> ⚠ **Warning:** After you turn on Campaign Member Sync, we recommend that you keep it enabled at all times. The configuration affects other processes and can cause data discrepancies if it's disabled later.

Campaign Member Sync shows your prospects in Salesforce as campaign members. The sync works only from Account Engagement to Salesforce, so campaign member changes aren't reflected in associated Account Engagement campaigns.

Before you can use member sync, Connected Campaigns must be enabled. To sync a prospect, assign it to an Account Engagement user and associate it with an Account Engagement campaign.

To indicate that a first touch came from an Account Engagement campaign, synced campaign members show a status of Connected. If a campaign member is missing or doesn't show a Connected status, verify that the prerequisites for syncing have been met.

- The connector user or integration user has Edit permission on Campaigns.
- Marketing User is selected on its Salesforce user record.

To add campaign members after the first touch, create a completion action. For more recent marketing engagement activity, view the prospect record.

Other Considerations

- If the prospect shares an email address with another Salesforce contact, the record is synced as a contact. Otherwise, the prospect syncs as a lead.
- When you enable Campaign Member Sync, prospects sync retroactively for campaigns that are already connected.
- Campaign Member Sync doesn't archive or delete lead or contact records from Salesforce. Remove associated records from Salesforce manually.

- The campaign member created date in Salesforce refers to when the prospect was synced, not the creation date in Account Engagement.
- Campaign Member Sync works alongside other prospect syncing jobs.
- Expect slower sync times when a connected campaign has more than 10,000 prospects.

Sync Campaign Members

To sync campaign members between Account Engagement and Salesforce, turn on Member Sync.

Before you turn on Member Sync, make sure that the prospects you want to sync are assigned to users. Next, turn on Connected Campaigns, and then return to Account Engagement Settings to enable Member Sync.

⚠ Warning: Enabling Campaign Member Sync is a permanent change and can't be undone.

1. Open the Connected Campaigns page.
    - In Account Engagement, open **Settings** and click **Edit**. Scroll to Connected Campaigns.
    - In the Lightning app, select **Account Engagement Settings** and then **Connectors**. Click ⚙ to edit the Salesforce connector, and select the **Campaigns** tab.

2. Select **Enable Campaign Member Sync**.

3. Save your work.

Allow some time for campaign members to show up in Salesforce campaigns.

EDITIONS

Available in: Salesforce **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions with any Account Engagement Edition

USER PERMISSIONS

To turn on Member Sync:
- Account Engagement Administrator role