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Together, Pardot and Salesforce track valuable engagement data that can tell you how well your marketing assets resonate with your customer base. Turn on Engagement History and choose where to surface this valuable data throughout Salesforce in the form of fields, related lists, and Lightning components.

Considerations for Engagement History
When you work with Engagement History features, keep these considerations in mind.

Report on Engagement History Data
Engagement History gives you access to prospect engagement data in Salesforce. To better understand this data, create a custom report that contains engagement metrics alongside campaign and opportunity data. We recommend five common custom report types for reporting on Pardot assets.

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.

Resources
Find out more about how to use Engagement History and reports.

Considerations for Engagement History
When you work with Engagement History features, keep these considerations in mind.

Prerequisites for Engagement History Features
- Engagement History requires a verified Salesforce-Pardot connector.
- Connected Campaigns must be enabled for most features. When campaigns aren’t connected, values show 0.

Setup and Storage
- Assets associated with connected campaigns are stored as records in Salesforce and apply to storage limits. Engagement activities on these assets remain in Pardot, and don’t count toward Salesforce storage limits. For example, let’s say an automated email in Pardot is synced to Salesforce as a list email record. This record counts toward your Salesforce storage limit, but the engagement activities associated with the record come directly from Pardot and don’t count toward Salesforce storage.
- Engagement History metrics are refreshed every few minutes, typically less than 10.
- Engagement history data in the custom Lightning component is visible in Salesforce, but isn’t available for reports. To see the most up-to-date information reload the page.
Report on Engagement History Data

Engagement History gives you access to prospect engagement data in Salesforce. To better understand this data, create a custom report that contains engagement metrics alongside campaign and opportunity data. We recommend five common custom report types for reporting on Pardot assets.

Refer to the following lists to configure each custom report type, and use the steps to build the reports you want.

1. From Salesforce Setup, enter Report in the Quick Find box, and then select Report Types.
2. Click New Custom Report Type.
3. In the Fields Available for Reports section, click Edit Layout.
4. In the Field Layout Properties section, click Create New Section.
5. Give the section a title, and then drag the fields as outlined by the asset types listed here.

Campaigns Engagement
Primary Object: Campaigns
Section 1: Campaigns
Section 2: Parent Campaigns

Landing Pages Engagement
This report includes any landing page published from Pardot or Salesforce. To include only classic landing pages, filter the report with the Source "Pardot."
Primary Object: Campaigns
Relationship: Landing Page, where the A record has at least one related B record
Section 1: Landing Pages
Section 2: Campaigns
Section 3: Parent Campaigns

List Emails Engagement
This report includes any list email sent from Pardot or Sales Cloud. To include only emails sent from Pardot, filter the report with the From Address “Pardot Marketing Automation.”
Primary Object: Campaigns
Relationship: List Email, where the A record has at least one related B record
Section 1: List Emails
Section 2: Campaigns
Section 3: Parent Campaigns

Marketing Forms Engagement
This report includes data associated with any form and form handler in Pardot. To show only forms or form handlers, add a filter on the Type field.
Show Engagement History on Records

Primary Object: Campaigns
Relationship: Marketing Form, where the A record has at least one related B record

Section 1: Marketing Forms
Section 2: Campaigns
Section 3: Parent Campaigns

Marketing Links Engagement
This report includes data associated with any custom redirect or file in Pardot. To show only redirects or files, add a filter on the Type field.

Primary Object: Campaigns
Relationship: Marketing Link, where the A record has at least one related B record

Section 1: Marketing Links
Section 2: Campaigns
Section 3: Parent Campaigns

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

<table>
<thead>
<tr>
<th>Feature</th>
<th>Available On...</th>
<th>Data Storage</th>
<th>Prerequisites</th>
</tr>
</thead>
</table>
| Metrics Fields on page 5 | • Campaign  
  • Marketing Link*  
  • Marketing Form*  
  • Landing Page*  
  • List Email | Salesforce | • Connected Campaigns  
  • Field-level security: Access to engagement history metrics |
| Related List (Marketing Assets) on page 7 | Campaign | Salesforce | • Connected Campaigns |
| Related List (Activities) on page 8 | • Lead  
  • Contact  
  • Account | Pardot | • Logged in to Pardot via Salesforce SSO |
### Show Engagement History on Records

<table>
<thead>
<tr>
<th>Feature</th>
<th>Available On...</th>
<th>Data Storage</th>
<th>Prerequisites</th>
</tr>
</thead>
</table>
|         | • Person Account  
|         | • List Email  
|         | • Marketing Link*  
|         | • Marketing Form*  
|         | • Landing Page*  | Salesforce  | Connected Campaigns |
| Engagement History Metrics Lightning Component on page 10 | Campaign  | Pardot  | Logged in to Pardot via Salesforce SSO |
| Engagement History Custom Lightning Component on page 11 | • Lead  
|         | • Contact  
|         | • Person Account  | Tableau CRM platform  | Pardot permission set  
|         | This data is updated every 8 hours.  
| Engagement History Dashboard Lightning Component on page 13 | • Campaign  
|         | • Account  
|         | • Lead  
|         | • Contact  
|         | • Person Account  
|         | • Opportunity  | Tableau CRM platform  | Connected Campaigns (for a dashboard on campaign records only) |

### Using the Metrics Fields Component
Add Engagement History metrics as fields on connected campaigns and asset records. You can also build a custom report based on the Campaign object. These tools can help you determine which marketing assets are most effective.

### Using Engagement History Metrics Related Lists
Add the Engagement History Metrics related list to your campaign records to find the relationships that grow among campaigns, prospects, and assets.

### Using the Engagement History Related List
The Engagement History related list includes an activity feed of recent prospect engagement. It appears by default on most of your marketing asset records, but you can also add it to your list email, lead, contact, account, or person account records.

### Using Engagement History Metrics Lightning Component
Add the Engagement History Metrics Lightning component to your campaign records to show high-level metrics associated with the marketing assets in your connected campaigns.

### Using Engagement History Custom Lightning Component
Add the Engagement History Custom Lightning component to your lead, contact, and person account records to show how people interact with your marketing assets. This component comes with your Pardot AppExchange package.

### Engagement History Dashboards
An Engagement History Dashboard is powered by Tableau CRM and gives sales and marketing users the power to explore and visualize important data. Embed an Engagement History Dashboard component on campaign, account, lead, contact, person account, or opportunity records. The dashboard shows widgets that are tailored to each type of record.
Using the Metrics Fields Component

Add Engagement History metrics as fields on connected campaigns and asset records. You can also build a custom report based on the Campaign object. These tools can help you determine which marketing assets are most effective.

What’s Included?

- Engagement metrics from all asset types, via Salesforce connected campaign records
- Automated email metrics from after December 14, 2018

Note: This component doesn’t show activity associated with archived prospects, filtered visitors, or operational emails.

### Marketing Form

**Product Launch Webinar Registration**

<table>
<thead>
<tr>
<th>Campaign</th>
<th>Total Views</th>
<th>Total Submissions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Product Launch Webinar</td>
<td>1,343</td>
<td>1,121</td>
</tr>
</tbody>
</table>

**Related**

**Details**

**Information**

- Name: Product Launch Webinar Registration
- Type: Form
- Campaign: Product Launch Webinar

**Engagement Metrics**

- Total Views: 1,343
- Unique Views: 1,208
- Total Submissions: 1,121
- Unique Submissions: 1,029
- Submission Rate: 83.47%
- Total Clicks: 0
- Unique Clicks: 0
- Total Errors: 40
- Unique Errors: 40
- Error Rate: 2.98%
More About Metrics

To show any of these fields on campaign records, add them on the page layout. Choose the fields that make the most sense for your users, and group them under a section with a label, such as Engagement Metrics. By default, marketing asset records include the available metrics from this chart.

<table>
<thead>
<tr>
<th>Salesforce Object</th>
<th>Associated Pardot Asset</th>
<th>Available Metrics</th>
</tr>
</thead>
</table>
| List Email        | List emails and automated email (operational emails excluded) | • Total Delivered  
• Delivery Rate  
• Total Soft Bounced  
• Total Hard Bounced  
• Total Opens  
• Unique Opens  
• Open Rate Click Through Rate  
• Unique Click Through Rate  
• Click to Open Ratio  
• Unique Opt Outs  
• Opt Out Rate  
• Total Spam Complaints  
• Spam Complaint Rate  
• Total Tracked Link Clicks  
• Unique Tracked Link Clicks |
| Landing Page      | Landing pages            | • Total View  
• Unique Views  
• Total Form Submissions  
• Unique Form Submissions  
• Form Submission Rate  
• Total Form Errors  
• Unique Form Errors  
• Form Error Rate  
• Total Tracked Link Clicks  
• Unique Tracked Link Clicks |
| Marketing Link    | Files and custom redirects | • Total Tracked Link Clicks  
• Unique Tracked Link Clicks |
| Marketing Form    | Forms and form handlers  | • Total View  
• Unique Views  
• Total Form Submissions  
• Unique Form Submissions |
<table>
<thead>
<tr>
<th>Salesforce Object</th>
<th>Associated Pardot Asset</th>
<th>Available Metrics</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>• Form Submission Rate</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Total Form Errors</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Unique Form Errors</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Form Error Rate</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Total Tracked Link Clicks</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Unique Tracked Link Clicks</td>
</tr>
</tbody>
</table>

Two sets of these fields are available—to reflect the campaign and the campaign hierarchy.

- Total Emails Delivered (via List Email object)
- Unique Email Opens (via List Email object)
- Unique Email Tracked Link Clicks (via List Email object)
- Total Form Views (via Marketing Form object)
- Total Form Submissions (via Marketing Form object)
- Unique Marketing Link Clicks (via Marketing Link object)
- Total Landing Page Views (via Landing Page object)
- Total Landing Page Form Submissions (via Landing Page object)

Using Engagement History Metrics Related Lists

Add the Engagement History Metrics related list to your campaign records to find the relationships that grow among campaigns, prospects, and assets.

What’s Included?

- Engagement metrics from all asset types, via Salesforce connected campaign records
- Automated email metrics from after December 14, 2018

Note: This component doesn’t show filtered visitor activity or activity associated with archived prospects.
More About Engagement History Metrics

To display the metrics you need most, place Engagement History Metrics related list on your campaign records. The Metrics related list displays performance indicators for each asset type. For example, sends and opens for a list email, or views and form submissions for a landing page.

Related lists for Landing Page, List Email, Marketing Form, and Marketing Link are available in the related lists section of your page layouts. The List Emails related list includes automated emails from Engagement Studio, completion actions, and automation rules. It doesn’t include operational emails. The Program Name field isn’t default on this related list, but you can add it in the page layout editor.

Using the Engagement History Related List

The Engagement History related list includes an activity feed of recent prospect engagement. It appears by default on most of your marketing asset records, but you can also add it to your list email, lead, contact, account, or person account records.

What’s Included?

- Engagement metrics from all asset types, which originate in Pardot
- Some automated email activities, depending on where the related list is
- Localization based on Pardot locale setting (or Salesforce, when User Sync is in enabled)

Note: This component doesn’t show filtered visitor activity or activity associated with archived prospects.
More About Engagement History

To show this activity data on a record, drag the Engagement History related list to a tab on your page layout. We recommend placing it on a tab that doesn’t load by default because a long list can affect page load speed.

This related list shows the last 30 days of data and presents different data fields depending on the object that displays it. Available fields for each object are listed in this chart.

<table>
<thead>
<tr>
<th>Object</th>
<th>Available Fields</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account</td>
<td>• Prospect</td>
</tr>
<tr>
<td></td>
<td>• Asset Name</td>
</tr>
<tr>
<td></td>
<td>• Asset Type</td>
</tr>
<tr>
<td></td>
<td>• Activity Type</td>
</tr>
<tr>
<td></td>
<td>• Activity Date</td>
</tr>
<tr>
<td>Lead, Contact, Person Account</td>
<td>• Asset Name</td>
</tr>
<tr>
<td></td>
<td>• Asset Type</td>
</tr>
<tr>
<td></td>
<td>• Activity Type</td>
</tr>
<tr>
<td></td>
<td>• Activity Date</td>
</tr>
<tr>
<td>List Email, Marketing Form,</td>
<td>• Prospect</td>
</tr>
<tr>
<td>Marketing Link, Landing Page</td>
<td>• Activity Type</td>
</tr>
<tr>
<td></td>
<td>• Activity Date</td>
</tr>
</tbody>
</table>
Using Engagement History Metrics Lightning Component

Add the Engagement History Metrics Lightning component to your campaign records to show high-level metrics associated with the marketing assets in your connected campaigns.

What’s Included?

- Engagement metrics from all asset types, via Salesforce connected campaign records
- Automated email metrics from after December 14, 2018

Note: This component doesn’t show activity associated with archived prospects, filtered visitors, or operational emails.

To add this component, open the Lightning App Builder and look in the Standard components list. Select and drag the Engagement Metrics component into a tab on your page layout.
Using Engagement History Custom Lightning Component

Add the Engagement History Custom Lightning component to your lead, contact, and person account records to show how people interact with your marketing assets. This component comes with your Pardot AppExchange package.

What’s Included?

- Engagement activities from all asset types, which originate in Pardot
- Some automated email activities, depending on where the related list is
- Localization based on Pardot locale setting (or based on Salesforce, when User Sync is enabled)

Note: This component doesn’t show filtered visitor activity or activity associated with archived prospects.

To add this component, open the Lightning App Builder and look in the Custom - Managed components list. Select and drag the Engagement History component into your page layout.

Engagement History Custom Lightning Component Activity Glossary

These prospect activities appear in the Engagement History Custom Lightning component. The component doesn’t show activities for archived prospects.

<table>
<thead>
<tr>
<th>Activity</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>AddThis Share</td>
<td>Prospect clicked an AddThis icon in an email and shared your marketing content.</td>
</tr>
<tr>
<td>Tracked Link Clicked</td>
<td>Prospect clicked a tracked link. Includes custom redirects and tracked links in emails, thank you content, and social messages.</td>
</tr>
<tr>
<td>Email Hard Bounce</td>
<td>Email sent to the prospect hard bounced due to an invalid email address. The prospect was automatically marked Do Not Email. If your account allows multiple prospects with the same email address, prospect records show a bounce if a prospect with the same email address bounces.</td>
</tr>
<tr>
<td>Email Open</td>
<td>Prospect opened an email.</td>
</tr>
<tr>
<td>Email Resubscribe</td>
<td>Prospect resubscribed to emails from the unsubscribe page.</td>
</tr>
<tr>
<td>Email Sent</td>
<td>Prospect was sent an email.</td>
</tr>
<tr>
<td>Email Soft Bounce</td>
<td>Email sent to the prospect soft bounced due to the prospect’s mail server being unavailable. The prospect is still mailable, but is marked Do Not Email after five soft bounces. If your account allows multiple prospects with the same email address, the prospect record shows a bounce if a prospect with that email address bounces.</td>
</tr>
</tbody>
</table>

Editions

Available in: Salesforce Professional, Enterprise, Performance, and Unlimited Editions with All Pardot editions

User Permissions

To view Engagement History metrics:

- CRM User, Sales Cloud User, or Service Cloud User
<table>
<thead>
<tr>
<th>Activity</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email Spam Complaint</td>
<td>Prospect reported spam from the prospect’s email client. This prospect is marked Do Not Email.</td>
</tr>
<tr>
<td>Email Unsubscribe</td>
<td>Prospect clicked unsubscribe in a Pardot email or unsubscribed from an Email Preference Center. If your account allows multiple prospects with the same email address, prospect records show an unsubscribe if a prospect with that email address unsubscribes.</td>
</tr>
<tr>
<td>Email Preferences Open</td>
<td>Prospect viewed an email preference page.</td>
</tr>
<tr>
<td>Form View</td>
<td>Prospect viewed a form or form handler.</td>
</tr>
<tr>
<td>Form Error</td>
<td>Prospect had an error when submitting a form or form handler. Errors are often due to the prospect leaving a field blank or submitting invalid information.</td>
</tr>
<tr>
<td>Form Success</td>
<td>Prospect successfully submitted a form or form handler, including forms on landing pages.</td>
</tr>
<tr>
<td>Landing Page View</td>
<td>Prospect viewed a landing page.</td>
</tr>
<tr>
<td>File Accessed</td>
<td>Prospect clicked a link to a non-image file hosted by Pardot.</td>
</tr>
<tr>
<td>Olark Live Chat</td>
<td>Prospect contacted one of your users through the Olark live chat connector, and the chat conversation was recorded.</td>
</tr>
<tr>
<td>Opportunity Associated</td>
<td>Opportunity was associated with this prospect.</td>
</tr>
<tr>
<td>Opportunity Created</td>
<td>Opportunity was created for this prospect.</td>
</tr>
<tr>
<td>Opportunity Lost</td>
<td>Opportunity for this prospect was lost.</td>
</tr>
<tr>
<td>Opportunity Won</td>
<td>Opportunity for this prospect was won.</td>
</tr>
<tr>
<td>Priority Page View</td>
<td>Prospect viewed a priority page.</td>
</tr>
<tr>
<td>Site Search</td>
<td>Prospect searched for a term on your website’s site search. The search term is also listed in the activity.</td>
</tr>
<tr>
<td>Wistia Video Viewed</td>
<td>Wistia video played or viewed.</td>
</tr>
<tr>
<td>Website Visit</td>
<td>A prospect’s visitor session. Includes the number of pages viewed during the session and referrer information.</td>
</tr>
<tr>
<td>Webinar Attended</td>
<td>Prospect attended a webinar via GoToWebinar, WebEx, or ReadyTalk.</td>
</tr>
<tr>
<td>Webinar Registered</td>
<td>Prospect registered for a webinar via GoToWebinar, WebEx, or ReadyTalk.</td>
</tr>
<tr>
<td>Webinar Invited</td>
<td>Prospect invited to a webinar.</td>
</tr>
<tr>
<td>Webinar Accepted</td>
<td>Prospect accepted webinar invitation.</td>
</tr>
<tr>
<td>Webinar Absent</td>
<td>Prospect absent from a webinar that the prospect registered for via GoToWebinar, WebEx, or ReadyTalk.</td>
</tr>
</tbody>
</table>
## Engagement History Dashboards

An Engagement History Dashboard is powered by Tableau CRM and gives sales and marketing users the power to explore and visualize important data. Embed an Engagement History Dashboard component on campaign, account, lead, contact, person account, or opportunity records. The dashboard shows widgets that are tailored to each type of record.

### Considerations for Engagement History Dashboard

When you work with Engagement History Dashboards, keep these considerations in mind.

#### Engagement History Dashboard Differences

The Engagement History Dashboard is available on a few types of records, and shows slightly different information based on where it’s placed.

#### Turn On Engagement History Dashboards

Start exploring Pardot engagement data on your Salesforce campaign, account, lead, contact, and person account records. Use Marketing Setup to turn on the feature and assign permissions. Then, embed a dashboard by adding the Engagement History Dashboard component to Lightning pages.

### Considerations for Engagement History Dashboard

When you work with Engagement History Dashboards, keep these considerations in mind.

#### Permissions and Allocations

- If you use Professional Edition, make sure that your org has the API add-on.
- Your Pardot edition determines how many user licenses are allotted for sales and marketing users.
  - Growth: 5
  - Plus: 10
  - Advanced: 20
  - Premium: 20
- The Analytics View Only Embedded App permissions set license gives your sales and marketing users access to analytics data and Engagement History Dashboards. It doesn’t allow access to Tableau CRM Analytics Studio.
- The data inside Engagement History Dashboards originates from Pardot and is pushed into Tableau CRM. This data doesn’t count toward Salesforce storage limits, but records do count toward Tableau CRM data row limits.
- Connected Campaigns isn’t required to use Engagement History Dashboards, but it is recommended for the full dashboard functionality.
• For Growth Edition, Engagement History can sync up to 90 days or 50 million rows of data, whichever comes first. For Plus, Advanced, and Premium editions where B2B Marketing Analytics and the Prospect and Activity dataset are enabled, these features can sync up to 3 years or 35 million rows in total.

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

Working with Dashboards

• The first sync is always the biggest. Allow more than 24 hours for the initial sync of metrics data. The dataset is then refreshed every 8 hours.

• Engagement History Dashboards aren’t supported in Internet Explorer 11.

• Data from unconnected campaigns is available in the dashboard, but it can’t be acted on. To click an asset or activity, the asset or activity must be related to a connected campaign. An application error appears when you attempt to interact with an item related to an unconnected campaign.

• If data is missing from the dashboard, it’s usually because there’s no data associated for the record in the given timeframe.

Dashboards and Multiple Business Units

• Because of the nature of leads, contacts, and person accounts, dashboards on these records show data for only one business unit at a time.

• Dashboards on accounts, campaigns, and opportunities can show data associated with more than one business unit.

• A user’s access and sharing settings determines whether they can act on datapoints. For example, if Luz has access to Business Unit A only, the Account dashboard can show data that originates in Business Units B and C. However, she can’t open any records from B or C.

Using the Opportunity Dashboard

• This dashboard uses activity dates to associate engagement to open opportunities.

• Reference lines appear only when an opportunity has a role assigned or when the opportunity’s dates fall within the dataset date range.

• In the Contact widget, contacts with an unassigned contact role are labeled Unspecified. If a contact has no role, it’s labeled None.

• If data is missing from the Opportunity dashboard, it’s usually because no opportunity contact roles are assigned.

Engagement History Dashboard Differences

The Engagement History Dashboard is available on a few types of records, and shows slightly different information based on where it’s placed.

Engagement History Dashboards have some similarities, such as availability and permissions. All the dashboards are based on valid, unfiltered visitor and prospect data. Data includes visitors that have a prospect ID, including archived prospects. But because the dashboards work on a variety of records, the filtering and widgets used on each dashboard type differ slightly.

The four types of dashboards are based on campaigns, opportunities, accounts, or leads and contacts. Each type has some basic filtering, which makes the dashboard relevant to the record that it appears on. From there, users can explore the data with more filters.
<table>
<thead>
<tr>
<th>Dashboard Type</th>
<th>Available on</th>
<th>Description</th>
<th>Widgets</th>
</tr>
</thead>
<tbody>
<tr>
<td>Campaign dashboard</td>
<td>Campaign records</td>
<td>Shows engagement activity on campaign assets filtered by the selected campaign record</td>
<td>Graph: Engagement Trends</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Table: Engagement Detail</td>
</tr>
<tr>
<td>Account dashboard</td>
<td>Account records</td>
<td>Shows campaign activity and active contacts filtered by the selected account record</td>
<td>Graphs: Campaign Activities, Engagement over Time, Most Active</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Table: Engagement Detail</td>
</tr>
<tr>
<td>Lead/Contact dashboard</td>
<td>Lead, contact, and person account records</td>
<td>Shows the person’s activity by campaign and asset filtered by the selected account record</td>
<td>Graphs: Activity Over Time, Engaged Campaigns, Engaged Content</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Table: Engagement Detail</td>
</tr>
<tr>
<td>Opportunity dashboard</td>
<td>Opportunity records</td>
<td>Shows engagement activity associated with contacts or person accounts that have an opportunity contact role. This dashboard is filtered by the selected opportunity record and its associated account</td>
<td>Graphs: Activity Timeline (Filter by Contact), Activity by Campaign</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Table: Engagement Detail</td>
</tr>
</tbody>
</table>

**Turn On Engagement History Dashboards**

Start exploring Pardot engagement data on your Salesforce campaign, account, lead, contact, and person account records. Use Marketing Setup to turn on the feature and assign permissions. Then, embed a dashboard by adding the Engagement History Dashboard component to Lightning pages.

1. From Marketing Setup, in the Quick Find box, enter *Engagement History*, and then select *Engagement History*.
2. Jump to step 3 and turn on Engagement History Dashboards.
3. Using the Lightning App Builder, find the Engagement History Dashboard component in the Standard section, and drag it into a tab.
4. In Marketing Setup, assign the Analytics View Only User permission set to each user who wants to see the dashboard.
5. Customers using Plus, Advanced, or Premium editions with B2B Marketing Analytics can turn on access to up to three years of engagement data. (Optional)
   a. From Marketing Setup, in the Quick Find box, enter *Analytics*, and then select *B2B Marketing Analytics*.
   b. Click *Optional Features*, and expand *Identify Your Most Engaged Prospects*.
   c. Click *Enable Dataset*.

**EDITIONS**

Available in: Salesforce Professional (with API access), Enterprise, Performance, and Unlimited Editions with Pardot Growth, Plus, Advanced, or Premium Edition

**USER PERMISSIONS**

To enable Engagement History Dashboards:
- Customize Application

To view Engagement History Dashboards:
- Analytics View Only User permission set
Note: If your account doesn’t have the system users Analytics Cloud Integration User and Analytics Cloud Security User, they’re added to your account when you enable Engagement History Dashboards.

It can take more than 24 hours for Pardot data to sync the first time. We recommend that you wait for data to appear before you assign access to users.

Resources

Find out more about how to use Engagement History and reports.

- Knowledge Article: Five recommended custom report types for Engagement History

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