Engagement History Implementation Guide

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SHOW ENGAGEMENT HISTORY ON RECORDS

Together, Account Engagement 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.

To use Engagement History, you must connect your Salesforce and Account Engagement campaigns.

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 marketing 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.

EDITIONS

Available in: Lightning Experience

Available in: Account Engagement **Growth**, **Plus**, **Advanced**, or **Premium** Editions with Salesforce **Essentials**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To use Engagement History:

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

Considerations for Engagement History

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

EDITIONS

Available in: Lightning Experience

Available in: Account Engagement **Growth**, **Plus**, **Advanced**, or **Premium** Editions with Salesforce **Essentials**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Prerequisites for Engagement History Features

- Engagement History requires a verified Salesforce connector and an active Account Engagement user.
- 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 Account Engagement, and don't count toward Salesforce storage limits. For example, let's say a marketing email syncs 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 Account Engagement 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.
- Data from email sends to test lists is included in Engagement History and other reports. To exclude test list metrics, associate your test email with a test campaign.
- For help with setting up Engagement History features, an Account Engagement admin can use the assistant in Marketing Setup.

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 marketing assets.

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.

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 all landing pages. 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 all list emails. To include only emails sent from Account Engagement, 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

EDITIONS

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

USER PERMISSIONS

To create reports:

- Sales, Service, or CRM permission set

  AND

  Create and Customize Reports

  AND

  Report Builder

	• 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. To show only forms or form handlers, add a filter on the Type field. • 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. 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.

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.

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 Account Engagement 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.

USER PERMISSIONS

To use Engagement History:

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

Feature	Available On...	Data Storage	Prerequisites
Metrics Fields	• Campaign	Salesforce	• Connected Campaigns

Feature	Available On...	Data Storage	Prerequisites
	• Marketing Link* • Marketing Form* • Landing Page* • List Email		• Field-level security: Access to engagement history metrics
Related List (Marketing Assets)	Campaign	Salesforce	• Connected Campaigns
Related List (Activities) on page 8	• Lead • Contact • Account • Person Account • List Email • Marketing Link* • Marketing Form* • Landing Page*	Account Engagement	• Logged in to Account Engagement via Salesforce SSO
Engagement History Metrics Lightning Component	Campaign	Salesforce	• Connected Campaigns
Engagement History Custom Lightning Component on page 11	• Lead • Contact • Person Account	Account Engagement	• Logged in to Account Engagement via Salesforce SSO
Engagement History Dashboard Lightning Component on page 13	• 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)

Use 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.

Use 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.

Add the 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 Account Engagement AppExchange package.

Engagement History Dashboards

An Engagement History Dashboard is powered by CRM Analytics 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.

Use 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.

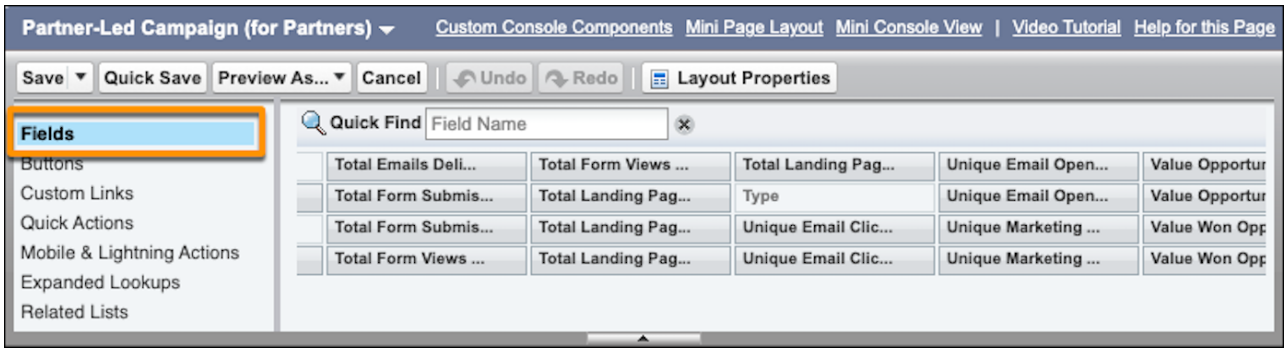
EDITIONS

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

USER PERMISSIONS

To view Engagement History metrics:

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



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.

Salesforce Object	Associated Account Engagement Asset	Available Metrics
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

Salesforce Object	Associated Account Engagement Asset	Available Metrics
		• Unique Form Submissions • Form Submission Rate • Total Form Errors • Unique Form Errors • Form Error Rate • Total Tracked Link Clicks • Unique Tracked Link Clicks
Campaigns	N/A	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)

Use 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.

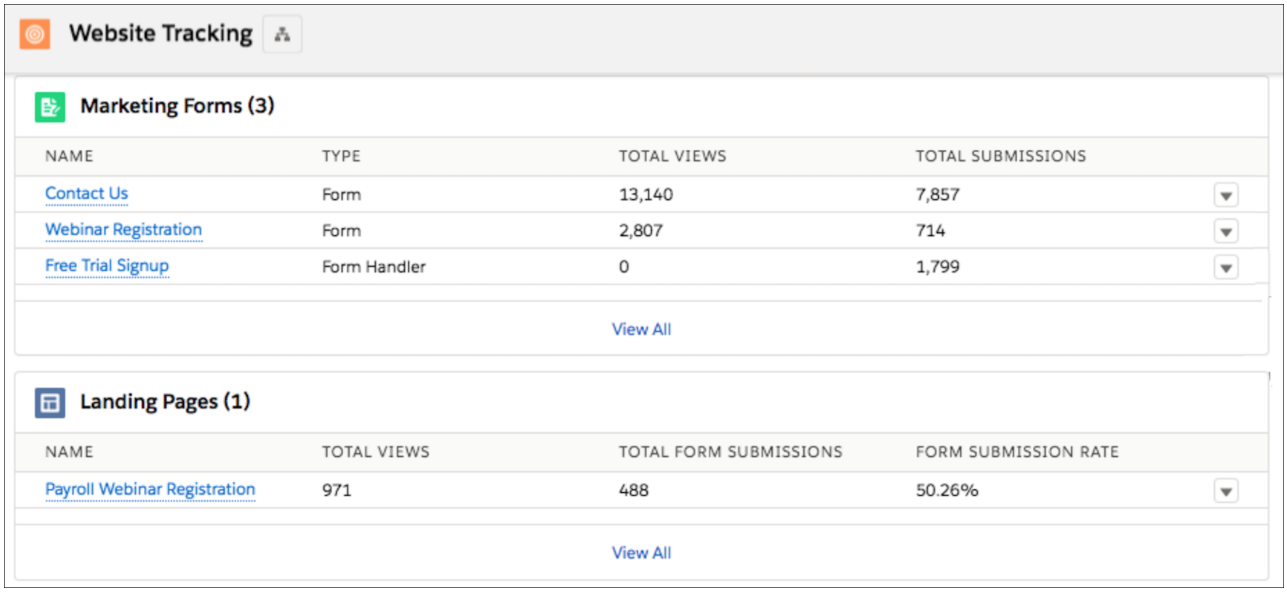
What's Included?

- 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.

EDITIONS

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



More About Engagement History Metrics

To display the metrics you need most, place the 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.

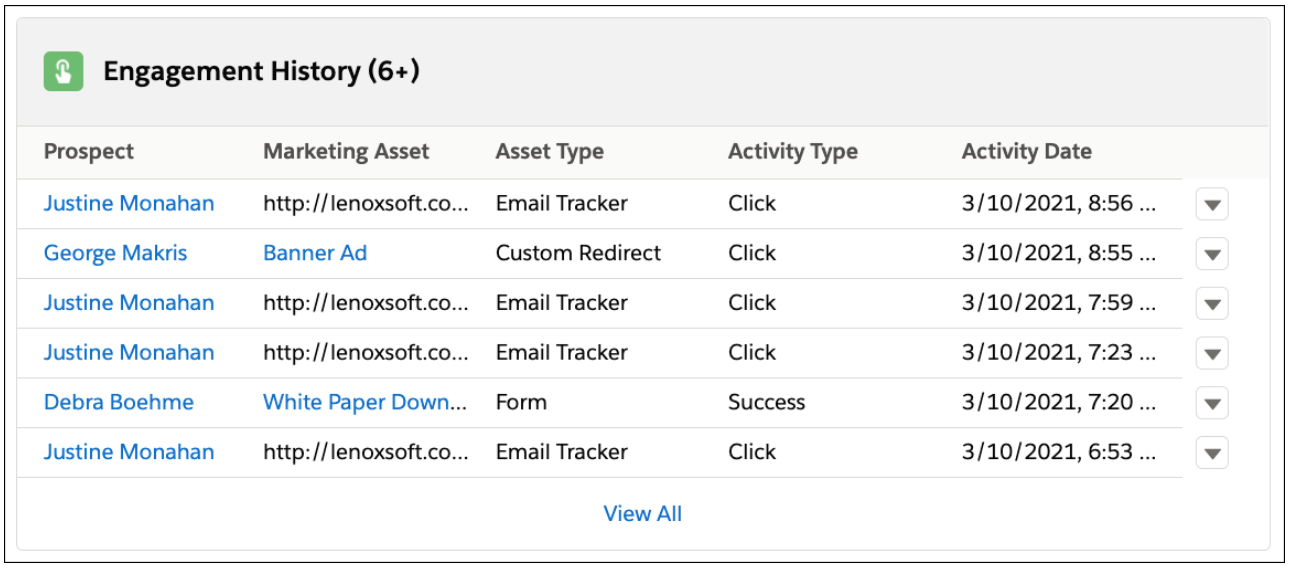
EDITIONS

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

What's Included?

- Engagement metrics from all asset types that originate in Account Engagement
- Some automated email activities, depending on where the related list is
- Localization based on your business unit 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.

Object	Available Fields
Account	• Prospect • Asset Name • Asset Type • Activity Type • Activity Date
Lead, Contact, Person Account	• Asset Name • Asset Type • Activity Type • Activity Date
List Email, Marketing Form, Marketing Link, Landing Page	• Prospect • Activity Type • Activity Date

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.

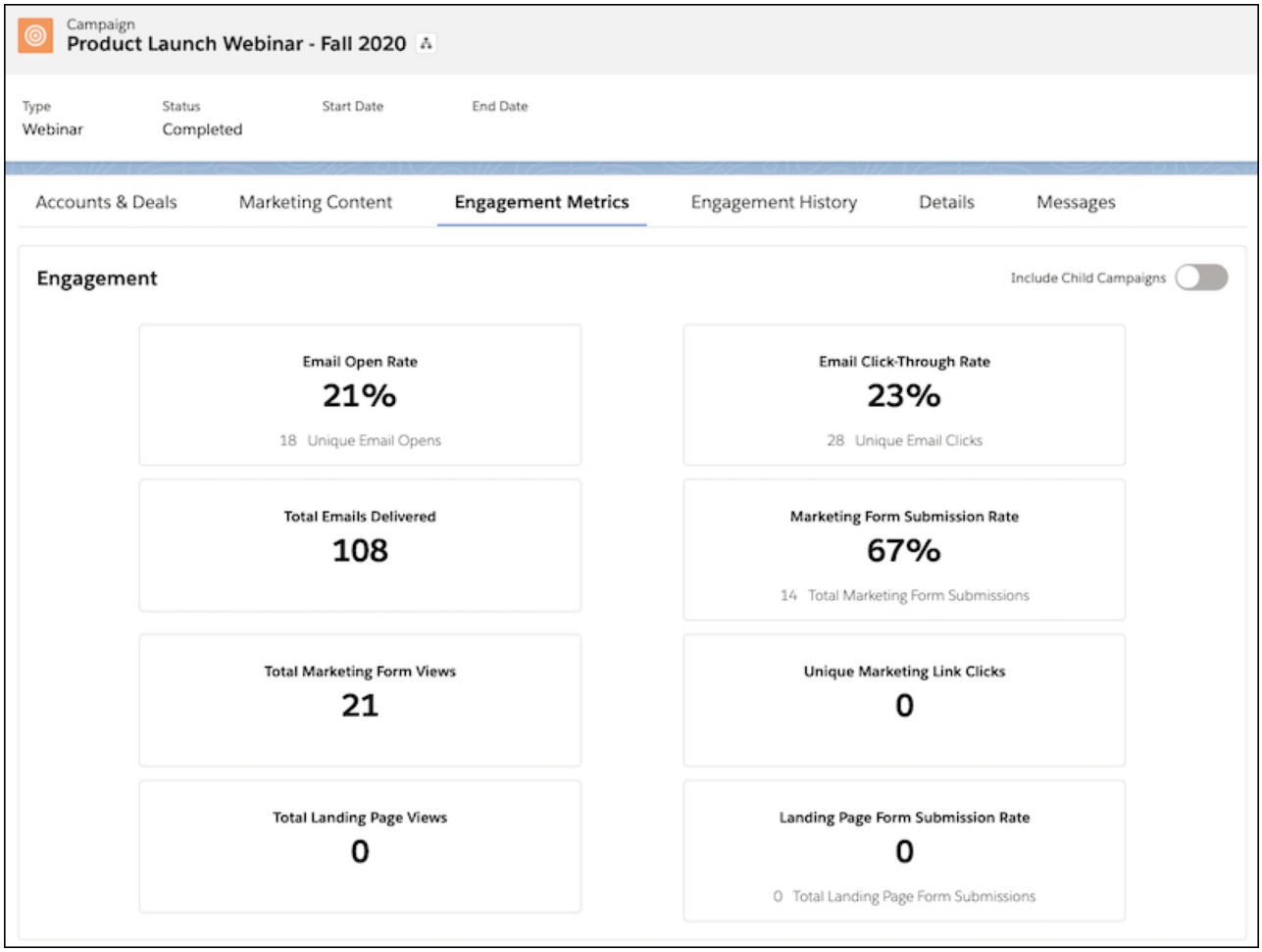
EDITIONS

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

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.

Add the 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 Account Engagement AppExchange package.

What's Included?

- Engagement activities from all asset types that originate in Account Engagement
- Some automated email activities, depending on where the related list is
- Localization based on your business unit 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.

1. From Setup, in the Quick Find box, enter *Lightning App Builder*, and then select **Lightning App Builder**.
2. Select the Lead or Contact page that you want to work with, and click **Edit**.
3. In the Components list, enter *Engagement History*, and then select **Engagement History**.
4. Drag the **Engagement History** component where you want it to appear in the page layout.
5. Save your work.
6. To manage assignment details, click **Activation**.

EDITIONS

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

USER PERMISSIONS

To view Engagement History metrics:

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

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.

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.

Activity	Description
AddThis Share	Prospect clicked an AddThis icon in an email and shared your marketing content.
Tracked Link Clicked	Prospect clicked a tracked link. Includes custom redirects and tracked links in emails, thank you content, and social messages.
Email Hard Bounce	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.
Email Open	Prospect opened an email.
Email Resubscribe	Prospect resubscribed to emails from the unsubscribe page.

Activity	Description
Email Sent	Prospect was sent an email.
Email Soft Bounce	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.
Email Spam Complaint	Prospect reported spam from the prospect's email client. This prospect is marked Do Not Email.
Email Unsubscribe	Prospect clicked unsubscribe in an Account Engagement email or unsubscribed from an Email Preference Center. If your account allows multiple prospects with the same email address, prospect records show an unsubscribe when a prospect with that email address unsubscribes.
Email Preferences Open	Prospect viewed an email preference page.
Form View	Prospect viewed a form or form handler.
Form Error	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.
Form Success	Prospect successfully submitted a form or form handler, including forms on landing pages.
Landing Page View	Prospect viewed a landing page.
File Accessed	Prospect clicked a link to a non-image file hosted by Account Engagement.
Olark Live Chat	Prospect contacted one of your users through the Olark live chat connector, and the chat conversation was recorded.
Opportunity Associated	Opportunity was associated with this prospect.
Opportunity Created	Opportunity was created for this prospect.
Opportunity Lost	Opportunity for this prospect was lost.
Opportunity Won	Opportunity for this prospect was won.
Priority Page View	Prospect viewed a priority page.
Site Search	Prospect searched for a term on your website's site search. The search term is also listed in the activity.
Wistia Video Viewed	Wistia video played or viewed.
Website Visit	A prospect's visitor session. Includes the number of pages viewed during the session and referrer information.
Webinar Attended	Prospect attended a webinar via GoToWebinar, WebEx, or ReadyTalk.

Activity	Description
Webinar Registered	Prospect registered for a webinar via GoToWebinar, WebEx, or ReadyTalk.
Webinar Invited	Prospect invited to a webinar.
Webinar Accepted	Prospect accepted webinar invitation.
Webinar Absent	Prospect absent from a webinar that the prospect registered for via GoToWebinar, WebEx, or ReadyTalk.
Event Registered	Prospect registered for an event.
Event Attended	Prospect attended an event.
Natural Search	Prospect visit resulting from natural search.
Paid Search	Prospect visit resulting from paid search.

Engagement History Dashboards

An Engagement History Dashboard is powered by CRM Analytics 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.

EDITIONS

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

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 Account Engagement marketing 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.

EDITIONS

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

Permissions and Allocations

- If you use Professional Edition, make sure that your org has the API add-on.
- Your 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 Analytics Studio.
- The data inside Engagement History Dashboards originates from Account Engagement and is pushed into CRM Analytics. This data doesn't count toward Salesforce storage limits, but records do count toward CRM Analytics data row limits.
- Connected Campaigns isn't required to use Engagement History Dashboards, but it's recommended for the full dashboard functionality.
- For Account Engagement Growth Edition, Engagement History can sync up to 90 days or 50 million rows of data, whichever comes first. For Account Engagement 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 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.
- Website visits come from the Engagement History dataset and have no corresponding Salesforce records.
- Learn how to embed dashboards in Lightning pages.

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.

EDITIONS

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

Dashboard Type	Available on	Description	Widgets
Campaign dashboard	Campaign records	Shows engagement activity on campaign assets filtered by the selected campaign record	Graph: Engagement Trends Table: Engagement Detail
Account dashboard	Account records	Shows campaign activity and active contacts filtered by the selected account record	Graphs: Campaign Activities, Engagement over Time, Most Active Table: Engagement Detail
Lead/Contact dashboard	Lead, contact, and person account records	Shows the person's activity by campaign and asset filtered by the selected account record	Graphs: Activity Over Time, Engaged Campaigns, Engaged Content Table: Engagement Detail
Opportunity dashboard	Opportunity records	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	Graphs: Activity Timeline (Filter by Contact), Activity by Campaign Table: Engagement Detail

Turn On Engagement History Dashboards

Start exploring Account Engagement marketing 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**.

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.

EDITIONS

Available in: Salesforce **Professional** (with API access), **Enterprise**, **Performance**, and **Unlimited** Editions with Account Engagement **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

It can take more than 24 hours for 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.

- Blog: How to Report on Marketing Activities with Engagement History
- Knowledge Article: Five recommended custom report types for Engagement History

EDITIONS

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