




B2B Marketing Analytics Implementation Guide

Salesforce, Summer '21



Note: This release is in preview. Features described in this document don't become generally available until the latest general availability date that Salesforce announces for this release. Before then, and where features are noted as beta, pilot, or developer preview, we can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only on the basis of generally available products and features.

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SET UP B2B MARKETING ANALYTICS

B2B Marketing Analytics is a Tableau CRM app that segments and visualizes your marketing and sales data. After you assign user permissions, marketers can create B2B Marketing Analytics dashboards in Tableau CRM Analytics Studio.

Before you begin, you must have a verified Salesforce-Pardot connector. See [Setting Up a Salesforce-Pardot Connector for Accounts Purchased After February 11, 2019](#) or [Setting Up a Salesforce-Pardot Connector for Accounts Purchased Before February 11, 2019](#).

[B2B Marketing Analytics Dashboards](#)

The B2B Marketing Analytics app template offers three dashboards of charts and tables to explore out of the box. With a few more steps, you can also create a Multi-Touch Attribution dashboard, Account-Based Marketing dashboard, or an Einstein Behavior Scoring dashboard. Each dashboard is built on predetermined datasets and filters, or lenses, that help you draw insights from your marketing data.

[Prerequisites for B2B Marketing Analytics](#)

The setup process for B2B Marketing Analytics varies based on when the feature was purchased or previously set up. Your permission set license affects how you enable B2B Marketing Analytics. To get the newest tools and data after the initial setup, users must update their apps periodically.

[Considerations for B2B Marketing Analytics](#)

Keep these considerations in mind while you set up and use B2B Marketing Analytics.

[Create and Upgrade B2B Marketing Analytics Apps](#)

To explore dashboards and lenses, create an app with the B2B Marketing Analytics template. As feature updates become available to B2B Marketing Analytics, you must upgrade your apps. You can also change an app's settings at any time by reconfiguring it.

[Optional Uses for B2B Marketing Analytics](#)

Your business goals dictate how you set up each B2B Marketing Analytics app. For example, track opportunities at each touchpoint or dig into engagement on a specific account. Optional dashboards are available with B2B Marketing Analytics.

[B2B Marketing Analytics Glossary](#)

Familiarize yourself with common Tableau CRM Analytics Studio terminology.

B2B Marketing Analytics Dashboards

The B2B Marketing Analytics app template offers three dashboards of charts and tables to explore out of the box. With a few more steps, you can also create a Multi-Touch Attribution dashboard, Account-Based Marketing dashboard, or an Einstein Behavior Scoring dashboard. Each dashboard is built on predetermined datasets and filters, or lenses, that help you draw insights from your marketing data.

Engagement

This dashboard shows how your primary marketing assets perform and how they contribute to the sales pipeline and opportunity lifecycle.

Included metrics: asset engagement on list emails, forms, and landing pages.

EDITIONS

Available in: Pardot **Plus**, **Advanced**, and **Premium** Editions with Salesforce **Enterprise**, **Performance**, and **Developer** Edition

Pipeline

The Pipeline dashboard shows your sales funnel from visitors to prospects and through to opportunities you've won. This dashboard is helpful for sales and marketing leadership to see which assets and campaigns push the most deals.

Included metrics: numbers of visitors, prospects, marketing qualified leads, open opportunities, closed-won opportunities, and velocity figures.

Marketing Manager

The Marketing Manager dashboard offers a quick look into the health of your business and which campaigns are yielding the best results. From this dashboard, you can drill into the Engagement and Pipeline dashboards.

Included metrics: pipeline deals, revenue by campaign, and marketing asset engagement.

Multi-Touch Attribution

The Multi-Touch Attribution dashboard provides a look into the top drivers at each lifecycle stage. Get a detailed view of marketing performance when you filter the dashboard by influence model, opportunity, account, and more.

Included metrics: revenue, total value, cost, ROI, top channels, and revenue by campaign.

Account-Based Marketing

The Account-Based Marketing dashboard brings together opportunities, contacts, marketing engagement, and sales activities. Narrow the dashboard by a certain account or a few, to find out how things are going with your sales reps.

Included metrics: pipeline value, number of opportunities, Pardot score, won/lost percentage, stage value, and a table of opportunities.

Einstein Behavior Scoring

The Einstein Behavior Scoring dashboard provides a look into the factors that Einstein uses to build your scoring model.

Included widgets: Most influential engagement activities, influential assets, and a table of leads and contacts who perform these activities.

Prerequisites for B2B Marketing Analytics

The setup process for B2B Marketing Analytics varies based on when the feature was purchased or previously set up. Your permission set license affects how you enable B2B Marketing Analytics. To get the newest tools and data after the initial setup, users must update their apps periodically.



Note: Here's how to find out what B2B Marketing Analytics version and Salesforce-Pardot connector version your org uses.

- To find out which license you're using, head over to Salesforce Setup. Open Company Information, and look for the Permission Set License field.
- To find your connector version, open Pardot Settings. Under Account Information, find the Salesforce Connector Version field.

This information can help you determine which permissions your B2B Marketing Analytics users need.

User Permissions

If you have the B2B Marketing Analytics permission set license, the permissions you need are already available in your org.

If you have the Tableau CRM Embedded App permission set license, you must create custom permission sets. To give managers and users access to apps, make two permission sets and name them Manage Tableau CRM Templated Apps and Use Tableau CRM Templated Apps.

EDITIONS

Available in: **Pardot Plus, Advanced, and Premium** Editions. Available for an extra cost in Pardot Pro and Ultimate Editions.

USER PERMISSIONS


To enable Tableau CRM platform:

- Customize Application

To create permission sets:

- Manage Profiles AND Permission Sets

- Base each permission set on the Analytics Embedded Apps permission set license.
- For the Manage permission set, allow all the available permissions and add the Create B2B Marketing Analytics Apps and Manage Tableau CRM Templated Apps user permissions. Then, assign the Manage permission set to the integration user (or connector user) and other power users.
- For the Use permission set, allow the permissions that you want a typical user to have. Add the Create B2B Marketing Analytics Apps and Use Tableau CRM Templated Apps user permissions. Then, assign the Use permission set to users who need access to B2B Marketing Analytics dashboards and apps.

 **Important:** Make sure that your connector user (either Connector User or Integration User) retains the necessary permissions at all times. If you unassign the connector user's permissions, B2B Marketing Analytics apps stop updating. Additional licenses are available with Tableau CRM Platform licenses, if more users need access.

App Updates

If it's your first time setting up B2B Marketing Analytics, follow the setup steps and then tell users they can create their own apps in Tableau CRM Analytics Studio.

If your org already contains B2B Marketing Analytics apps, make sure you're using the latest version. For information about legacy B2B Marketing Analytics, check out [Migration for Legacy Users](#) on page 7.

When changes are made to the B2B Marketing Analytics product, users must update each of their apps. A notification appears in the toolbar. [Upgrade a B2B Marketing Analytics Template](#) on page 14

Multi-Touch Attribution Dashboard

If you want to use the optional Multi-Touch Attribution dashboard, set up [Customizable Campaign Influence](#) first.

[Set Up B2B Marketing Analytics](#)

Review the prerequisites and permissions details for B2B Marketing Analytics, and then enable the feature in the Marketing Setup app.

[Permissions for B2B Marketing Analytics](#)

Create and assign permission sets for the connector user and B2B Marketing Analytics users. The app version you use determines which permission names are available.

[Migration for Legacy Users](#)

Datasets in legacy B2B Marketing Analytics apps are longer updated. Legacy apps include any custom apps that you made without selecting the B2B Marketing Analytics app template during setup. To get access to the most recent features and data, upgrade to templated apps.

Set Up B2B Marketing Analytics

Review the prerequisites and permissions details for B2B Marketing Analytics, and then enable the feature in the Marketing Setup app.

If you're new to Pardot and B2B Marketing Analytics, here's the fastest way to get started.

1. From Marketing Setup, select **B2B Marketing Analytics**, and then click **Getting Started**.
2. Expand each section to complete each task.
 - a. Share Pardot Data: Click **Manage Assignments**, and then add the Integration user to the selected permission set. Then, add the sales and marketing users who need access to B2B Marketing Analytics apps.
 - b. Enable Tableau CRM: Click **Open Tableau CRM Setup**, and then turn on Tableau CRM. If the Data Rows heading and Setup tiles appear, it's enabled.
 - c. Enable Data Sync and Connections: Click **Open Tableau CRM Settings**, select **Enable Data Sync and Connections**, and then save.
3. [Schedule replication](#).
4. After settings and permission sets are in place, you or your users can open Analytics Studio and begin creating apps.

To set up optional datasets and dashboards, select **Optional Features** in Marketing Setup.



Note: The Data Sync and Connections setting is recommended for most users, because it improves performance in Tableau CRM.

- When Data Sync is on, you must schedule replication to get the latest data.
- If you have any Tableau CRM apps besides B2B Marketing Analytics, Data Sync can retain other apps' filters and show inaccurate data in B2B Marketing Analytics.

EDITIONS

Available in: Pardot **Plus**, **Advanced**, and **Premium** Editions. Available for an extra cost in Pardot Pro and Ultimate Editions.

USER PERMISSIONS

To assign permission sets:

- Assign Permission Sets
- AND
- View Setup and Configuration

To create B2B Marketing Analytics apps:

- Manage Tableau CRM Templated Apps
- AND

Create B2B Marketing Analytics Apps OR B2B Marketing Analytics App permission set

Permissions for B2B Marketing Analytics

Create and assign permission sets for the connector user and B2B Marketing Analytics users. The app version you use determines which permission names are available.

Here's how to find out what B2B Marketing Analytics version and Salesforce-Pardot connector version your org uses.

- To find out which license you're using, head over to Salesforce Setup. Open Company Information, and look for the Permission Set License field.
- To find your connector version, open Pardot Settings. Under Account Information, find the Salesforce Connector Version field.

This information can help you determine which permissions your B2B Marketing Analytics users need.

If your org uses the Analytics Embedded App permission set license, refer to [Migration for Legacy Users](#) on page 7.

USER PERMISSIONS

To select who can use B2B Marketing Analytics:

- Customize Application
- AND Modify All Data

Connector User

The connector user is used in orgs with the v1 Salesforce-Pardot connector. The connector user must retain access to the following permissions at all times. If you reassign the connector user for other purposes, B2B Marketing Analytics can't receive updated data.

Permission Set Licenses

- B2B Marketing Analytics
- CRM User OR Sales User OR Service User

Permission Sets

- Pardot Connector User
- CRM User OR Sales Cloud User OR Service Cloud User
- B2B Marketing Analytics App

System Permissions

The B2B Marketing Analytics App permission set includes these system permissions by default.

- Create B2B Marketing Analytics Apps
- Download Tableau CRM Data
- Edit Tableau CRM Dataflows
- Manage Tableau CRM Templated Apps
- Use Tableau CRM Templated Apps

Integration User

The integration user is found in orgs with the v2 Salesforce-Pardot connector. The integration user must retain access to the following permissions at all times. If you reassign the integration user for other purposes, B2B Marketing Analytics can't receive updated data.

Permission Set Licenses

- B2B Marketing Analytics

Permission Sets

- Pardot
- Pardot Integration User
- CRM User OR Sales Cloud User OR Service Cloud User
- B2B Marketing Analytics App

System Permissions

Make sure that the B2B Marketing Analytics App permission set includes these system permissions.

- Create B2B Marketing Analytics Apps
- Download Tableau CRM Data
- Edit Tableau CRM Dataflows
- Manage Tableau CRM Templated Apps
- Use Tableau CRM Templated Apps

Manage Analytics User

Permission Set Licenses

- B2B Marketing Analytics
- CRM User OR Sales User OR Service User

Permission Sets

- Pardot

- CRM User OR Sales Cloud User OR Service Cloud User
- B2B Marketing Analytics App

System Permissions

Make sure that the B2B Marketing Analytics App permission set includes these system permissions.

- Create B2B Marketing Analytics Apps
- Download Tableau CRM Data
- Edit Tableau CRM Dataflows
- Manage Tableau CRM Templated Apps
- Use Tableau CRM Templated Apps

Use Analytics User

Use a custom permission set to create use-only users. We recommend that you clone the original B2B Marketing Analytics permission set and remove unnecessary system permissions.

Permission Set Licenses

- B2B Marketing Analytics
- CRM User OR Sales User OR Service User

Permission Sets

- Pardot
- CRM User OR Sales Cloud User OR Service Cloud User
- B2B Marketing Analytics App

System Permissions

Make sure that the cloned B2B Marketing Analytics permission set includes these system permissions.

- B2B Marketing Analytics Apps
- Use Tableau CRM Templated Apps

[Create Permission Sets](#)

You can clone a permission set or create a new one. A cloned permission set starts with the same licenses and enabled permissions as the original one. A new permission set starts with no licenses selected and no permissions enabled.

Create Permission Sets

You can clone a permission set or create a new one. A cloned permission set starts with the same licenses and enabled permissions as the original one. A new permission set starts with no licenses selected and no permissions enabled.



Tip: If your org has many permission sets, using permission set groups can help improve performance.

1. From Setup, enter *Permission Sets* in the Quick Find box, then select **Permission Sets**.
2. Click **New**.
3. Enter your permission set information.
4. Select the types of users for the permission set.

When you create a permission set, you select a specific user or permission set license. If only users with one type of license can use the permission set, select the license that's associated with the users. For example, to create a permission set for users with

- the Salesforce license, select **Salesforce**. You can enable permissions only allowed in the Salesforce license.
- the Identity Connect permission set license, select **Identity Connect**. You can enable permissions only allowed in the Identity Connect license.
- different licenses, select **None**. Not selecting a specific license allows you to assign the permission set to any user whose license allows the permissions you enable in the permission set. For example, to assign the permission set to users with the Salesforce license and to users with the Salesforce Platform license, select **None**.

When creating a permission set for a specific permission set license, refer to that feature's documentation. For example, to create a permission set for the Identity Connect permission set license, use these steps along with the Identity Connect documentation.



Example: Let's say you have several users with a profile called Sales User. This profile allows assignees to read, create, and edit leads. But you need some users to also delete and transfer leads. On the permission set page that you create, go to Find Settings and begin typing *Lead*. Under Object Settings, select **Leads** and enable delete. "Transfer Leads" is an app permission (rather than object permission). To enable it, in Find Settings, begin typing *Leads*. "Transfer Leads" is listed under App Permissions. Assign the permission set to users who need these permissions.



Note:

- Permission sets with no license selected don't include all possible permissions and settings.
- Assign a permission set with no license only to users whose user licenses allow the permissions and settings that you are enabling in the permission set. For example, don't create a permission set with no user license and then enable "Author Apex" and assign it to Salesforce Platform users. You can't assign this permission set to Salesforce Platform users because the Salesforce Platform user license doesn't allow Apex authoring.

Migration for Legacy Users

Datasets in legacy B2B Marketing Analytics apps are longer updated. Legacy apps include any custom apps that you made without selecting the B2B Marketing Analytics app template during setup. To get access to the most recent features and data, upgrade to templated apps.

Migration steps vary depending on when you purchased B2B Marketing Analytics and whether you enabled a recent version. Review these setup descriptions to identify which steps to take.

EDITIONS

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

Available in: **Essentials, Contact Manager, Professional, Group, Enterprise, Performance, Unlimited, Developer, and Database.com** Editions

USER PERMISSIONS

To create permission sets:

- "Manage Profiles and Permission Sets"

To assign permission sets:

- "Assign Permission Sets"

EDITIONS

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

If you choose to migrate your app's customizations, learn what to do before and after.

- [Before You Upgrade](#)
- [After Your Upgrade](#)

Set Up for Legacy Add-On Users

I purchased B2B Marketing Analytics as an add-on to Pardot Pro or Ultimate, and I didn't migrate to the app template.

Migrate your legacy apps to the latest version of B2B Marketing Analytics. The permission set license in your account is called Analytics Embedded App.

1. Review the prerequisite settings.
2. Create the Manage Tableau CRM Templated Apps permission set, and assign it to the connector user.
3. Create the Use Tableau CRM Templated Apps perm set, and assign it to sales and marketing users.
4. Save custom lenses, datasets, or dashboards to the My Shared Apps or My Private Apps folder.
5. Create an app.

[Permissions for Analytics Embedded App License](#)

The app version you use determines which permissions are available. After you determine which permission set license your org uses, assign the other permission sets and system permissions to different types of users.

Permissions for Analytics Embedded App License


The app version you use determines which permissions are available. After you determine which permission set license your org uses, assign the other permission sets and system permissions to different types of users.

Here's how to find out what B2B Marketing Analytics version and Salesforce-Pardot connector version your org uses.

- To find out which license you're using, head over to Salesforce Setup. Open Company Information, and look for the Permission Set License field.
- To find your connector version, open Pardot Settings. Under Account Information, find the Salesforce Connector Version field.

This information can help you determine which permissions your B2B Marketing Analytics users need.

If your org uses the Analytics Embedded Apps permission set license, refer to the following list of permissions.

 **Note:** In Summer '21 some system labels were updated to refer to Tableau CRM. Some older labels weren't changed and continue to include "Analytics." This behavior is expected.

EDITIONS

Available in: Pardot **Plus**, **Advanced**, and **Premium** Editions. Available for an extra cost in Pardot Pro and Ultimate Editions.

Connector User, Integration User, and Manage Analytics Users

Permission Set Licenses

- Tableau CRM Embedded App
- CRM User OR Sales User OR Service User

Permission Sets

- Pardot

- Pardot Connector User (v1) or Pardot Integration User (v2)
- CRM User OR Sales Cloud User OR Service Cloud User
- Manage Templated Analytics Apps (custom) or Manage Templated Tableau CRM Apps (custom)

System Permissions

Make sure that the permission set you create to manage templated apps includes these system permissions.

- Create and Edit Tableau CRM Dashboard
- Create B2B Marketing Analytics Apps
- Download Tableau CRM Data
- Edit Tableau CRM Dataflows
- Edit Dataset Recipes
- Manage Tableau CRM Templated Apps
- Upload External Data to Tableau CRM
- Use Tableau CRM
- Use Tableau CRM Templated Apps

Use Analytics Salesforce User

Permission Set Licenses

- Analytics Embedded App
- CRM User OR Sales User OR Service User

Permission Sets

- Pardot
- Pardot Connector User (v1) or Pardot Integration User (v2)
- CRM User OR Sales Cloud User OR Service Cloud User
- Use Templated Analytics Apps (custom) or Manage Templated Tableau CRM Apps (custom)

System Permissions

Make sure that the permission set you create to use templated apps includes these system permissions.

- Create B2B Marketing Analytics Apps
- Use Tableau CRM
- Use Tableau CRM Templated Apps

Considerations for B2B Marketing Analytics

Keep these considerations in mind while you set up and use B2B Marketing Analytics.

Setting It Up

- The Multi-Touch Attribution Dashboard, Account-Based Dashboard, Einstein Behavior Scoring dashboard, and Prospect and Activity dataset are optional.
- We don't recommend using B2B Marketing Analytics in sandbox orgs. To test dashboards, create a private app to configure and explore. Then, share the app with colleagues.

EDITIONS

Available in: Pardot **Plus**, **Advanced**, and **Premium** Editions. Available for an extra cost in Pardot Pro and Ultimate Editions.

- The necessary permission sets provide Editor access for B2B Marketing Analytics apps to every user. To restrict this ability, you can update the sharing settings. To keep data flowing as expected, make sure that the connector or integration user retains Editor access.
- If you assigned all of your available licenses, the Tableau CRM Platform license can share access with additional sales and marketing users.

Updating the App Template

- B2B Marketing Analytics is built on a Tableau CRM app template, which is updated a few times per year. An admin can enable the feature, but users must install and upgrade their apps as needed.
- Each time users upgrade to the latest app, they can overwrite the existing app or create one. When users overwrite an app, they lose custom dashboards and settings. Make a note of which dashboards, datasets, and lenses use any standard Pardot elements.
- To migrate customizations, move dashboards, datasets, and saved lenses into My Shared App or My Private App. Next, upgrade the app and edit the existing queries to reference the new dataset IDs. Confirm that important assets and customizations are available in the new app.
- Choose whether to keep older versions of apps for reference or delete them. When a new app is available, the previous version is no longer updated or supported.

Using Pardot Business Units

The Data Sync and Connections setting is recommended for most users, because it improves performance in Tableau CRM.

- When Data Sync is on, you must schedule replication to get the latest data.
- If you have any Tableau CRM apps besides B2B Marketing Analytics, Data Sync can retain other apps' filters and show inaccurate data in B2B Marketing Analytics.

Using B2B Marketing Analytics

- 📌 **Note:** As of the Summer '20 release, datasets in legacy B2B Marketing Analytics apps are no longer updated. Legacy apps include any custom apps you made without selecting the B2B Marketing Analytics app template during setup. For the latest datasets and features, re-create your apps with the B2B Marketing Analytics app template.
- B2B Marketing Analytics uses the currency setting from your Pardot account. Regardless of locale settings, currency formats in Tableau CRM apps support only decimals for the decimal separator and commas for the grouping separator.
- The Multi-Touch Attribution dashboard includes a filter for campaign influence models. The filter list contains only models that have campaigns and opportunities associated with them. The list can be empty for newer users.
- In orgs with Engagement History enabled, Tableau CRM Analytics Studio contains a read-only Pardot Engagement History app. Users can work with lenses to explore the dataset: 90 days of engagement data from connected campaigns and synced assets. This app powers the Engagement History Dashboard Lightning component.
- B2B Marketing Analytics isn't fully supported on Lightning Experience on iPad Safari. Dashboards don't always appear completely inside Analytics Studio, so we recommend that you open the app from the Analytics tab in Lightning Experience. Alternatively, try the Tableau CRM mobile app for iOS.

Working with Data

- B2B Marketing Analytics uses Bulk API calls to aggregate data in the datasets. This usage doesn't count against your Salesforce or Pardot API request limits.

- External datasets originate in Pardot and can't be edited in the Data Manager. They're updated every 24 hours and can't be synced manually. The external datasets are:
 - Pardot Campaign
 - Pardot Email
 - Pardot Email Template
 - Pardot Form and Form Handler
 - Pardot Landing Page
 - Pardot Opportunity
 - Pardot Prospect
 - Pardot Tags
 - Pardot Visitor
- For other datasets, you can schedule sync to avoid overlap and improve performance. Learn how to [Schedule Data Sync to Run Automatically](#).
- If you use B2B Marketing Analytics without embedded Engagement History dashboards enabled, you can sync up to 25 million rows of data.
- For Growth Edition, Engagement History can sync up to 90 days or 10 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.
- Due to date filters, time zones and other factors, you can encounter discrepancies between Pardot reporting data and B2B Marketing Analytics data. Find out more in this Knowledge Article: [Data Discrepancies in B2B Marketing Analytics](#).

Create and Upgrade B2B Marketing Analytics Apps

To explore dashboards and lenses, create an app with the B2B Marketing Analytics template. As feature updates become available to B2B Marketing Analytics, you must upgrade your apps. You can also change an app's settings at any time by reconfiguring it.

[Create a B2B Marketing Analytics App](#)

To create a B2B Marketing Analytics app in your org, navigate to Tableau CRM Analytics Studio and answer the setup questions.

[Reconfigure B2B Marketing Analytics](#)

If you make a mistake during setup or have new business needs, you can change the configuration of your B2B Marketing Analytics app at any time.

[Upgrade a B2B Marketing Analytics Template](#)

Each time Salesforce releases new datasets and improvements to the B2B Marketing Analytics template, each user must update their B2B Marketing Analytics app. When an upgrade is available, a link to upgrade appears in the app header.

EDITIONS

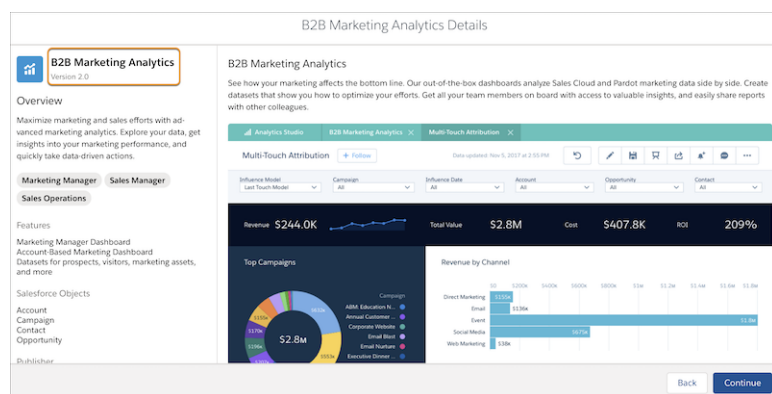
Available in: Pardot **Plus**, **Advanced**, and **Premium** Editions. Available for additional cost in Pardot Pro and Ultimate Editions.

Create a B2B Marketing Analytics App

To create a B2B Marketing Analytics app in your org, navigate to Tableau CRM Analytics Studio and answer the setup questions.

1. In Salesforce, from the App Launcher (⋮), find and open **Tableau CRM Analytics Studio**.
2. Click **Create** and select **App**.
3. Click **Start from Template** and then select **B2B Marketing Analytics**.

The app called B2B Marketing Analytics Legacy is no longer supported. Click through to the Details page, and verify that Version 2.0 appears in the sidebar.



4. Click **Next** and continue through setup.
5. Click **Done**.



Note: During the setup process, choose whether to include optional dashboards and datasets.

The setup process continues in the background. To see the status of your app, navigate to **Settings > Data Manager > Dataflow View** in Tableau CRM Analytics Studio.

USER PERMISSIONS

To create a B2B Marketing Analytics app:

- Manage Tableau CRM Templated Apps AND Create B2B Marketing Analytics Apps OR B2B Marketing Analytics permission set

To use B2B Marketing Analytics

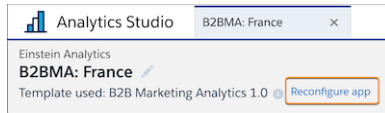
- Use Tableau CRM Templated Apps AND Create B2B Marketing Analytics Apps OR B2B Marketing Analytics permission set

Reconfigure B2B Marketing Analytics

If you make a mistake during setup or have new business needs, you can change the configuration of your B2B Marketing Analytics app at any time.

Important: Custom dashboards are overwritten during this process. Before you reconfigure, [back up your app and save any Pardot dataset IDs](#).

1. Open your B2B Marketing Analytics app in Tableau CRM Analytics Studio.
2. Click **Reconfigure app**.



To migrate customizations, move dashboards, datasets, and saved lenses into My Shared App or My Private App. Next, upgrade the app and edit the existing queries to reference the new dataset IDs. Confirm that important assets and customizations are available in the new app.

3. Work through the setup questions.
4. Click **Done**.

Check the update status at **Settings > Data Manager > Dataflow View** in Analytics Studio.

EDITIONS

Available in: Pardot **Plus**, **Advanced**, and **Premium** Editions. Available for additional cost in Pardot Pro and Ultimate Editions.

USER PERMISSIONS

To reconfigure B2B Marketing Analytics

- Manage Tableau CRM Templated Apps AND Create B2B Marketing Analytics Apps OR B2B Marketing Analytics permission set

Upgrade a B2B Marketing Analytics Template

Each time Salesforce releases new datasets and improvements to the B2B Marketing Analytics template, each user must update their B2B Marketing Analytics app. When an upgrade is available, a link to upgrade appears in the app header.

1. Open your B2B Marketing Analytics app in Tableau CRM Analytics Studio.

2. Click **Upgrade to new version**.

To migrate customizations, move dashboards, datasets, and saved lenses into My Shared App or My Private App. Next, upgrade the app and edit the existing queries to reference the new dataset IDs. Confirm that important assets and customizations are available in the new app.

3. Review the release notes provided and continue through the setup questions.

4. Choose to overwrite your app or create a new one.

Check the update status at **Settings > Data Manager > Dataflow View** in Analytics Studio.

EDITIONS

Available in: Pardot **Plus**, **Advanced**, and **Premium** Editions. Available for an extra cost in Pardot Pro and Ultimate Editions.

USER PERMISSIONS

To upgrade B2B Marketing Analytics:

- Manage Tableau CRM Templated Apps AND Create B2B Marketing Analytics Apps OR B2B Marketing Analytics permission set

To use B2B Marketing Analytics

- Use Tableau CRM Templated Apps AND Create B2B Marketing Analytics Apps OR B2B Marketing Analytics permission set

Optional Uses for B2B Marketing Analytics

Your business goals dictate how you set up each B2B Marketing Analytics app. For example, track opportunities at each touchpoint or dig into engagement on a specific account. Optional dashboards are available with B2B Marketing Analytics.

Account-Based Marketing Dashboard

Use Account-Based Marketing dashboards to understand how opportunities and contacts from one account engage with your marketing and sales assets. To use Account-Based Marketing dashboards, enable the integration user's access to B2B Marketing Analytics.

Multi-Touch Attribution Dashboard

Multi-Touch Attribution dashboards show you which marketing efforts are most influential during each stage of the purchase lifecycle. After you enable Connected Campaigns, engagement with Pardot's marketing assets and data from Sales Cloud appear together in one dashboard.

Prospect and Activity Dataset

To identify which content influences prospects in your sales funnel, add the optional Prospect and Activity dataset. Create a lens using this dataset to dig straight down to the individual prospect record that acted on a certain asset.

EDITIONS

Available in: Pardot **Plus**, **Advanced**, and **Premium** Editions. Available for additional cost in Pardot Pro and Ultimate Editions.

Account-Based Marketing Dashboard

Use Account-Based Marketing dashboards to understand how opportunities and contacts from one account engage with your marketing and sales assets. To use Account-Based Marketing dashboards, enable the integration user's access to B2B Marketing Analytics.

EDITIONS

Available in: Pardot **Plus**, **Advanced**, and **Premium** Editions. Available for additional cost in Pardot Pro and Ultimate Editions.

Dashboard Reference

B2B Marketing Analytics features optional account-based marketing offerings that come from three datasets: `pdAbmContact`, `pdAbmEvent`, and `pdAbmOpp`.

The Account-Based Marketing Dashboard can contain up to 10,000 accounts. If you have more than that, some accounts don't appear.

Metric Label	Description	Origin
Pipeline Value	Sum of monetary value associated with opportunities in the SQL stage for the selected accounts	ABM Opportunity dataset
Open Opportunities	Number of open opportunities associated with the selected accounts	ABM Opportunity dataset
Contacts	Number of contacts associated with selected accounts	ABM Contact dataset
Avg. Engagement Score	Sum of Pardot Scores divided by the number of scored contacts associated with the selected accounts	ABM Contact dataset
Sales Events	Number of sales activities for the selected accounts	ABM Event dataset

Other Charts

Pipeline Value by Account

Horizontal bar graph showing the sum of monetary value associated with opportunities in the SQL stage

Engagement Score by Account

Horizontal stacked graph showing the average engagement score per account

Sales Events by Account

Horizontal stacked graph showing the number of sales activities

Opportunities: Revenue Win Percentage

Donut chart showing percent of revenue won versus lost. Uses opportunity record from Salesforce.

Opportunities: Stage Value by Account

Horizontal stacked graph showing the sum of monetary value for each account, grouped by pipeline stage. Uses opportunity record from Salesforce.

Opportunities: Table

Table of data associated with selected accounts: account name, opportunity name, owner name, amount, account industry, and close date. To open an action menu, click an account, opportunity, or owner name.

Sales Activities: Time Spent on Events

Horizontal bar graph showing the sum of hours that opportunity owners have spent on activities associated with the selected accounts

Sales Activities: Number of Sales Events

Donut chart showing the number of activities that opportunity owners have spent on activities associated with the selected accounts

Dataset Reference

Account-Based Marketing Contact Dataset

Label	Field
Account Name	AccountId.Name
Contact Pardot Score	WhoId.pi__score__c

Account-Based Marketing Event Dataset

Label	Field
Account Name	AccountId.Name
Contact ID	WhoId.ID
Contact Name	WhoId.Name
Contact Pardot Grade	WhoId.pi__grade__c
Contact Pardot Score	WhoId.pi__score__c
Contact Title	WhoId.Title
Duration	DurationInMinutes
Event Account ID	AccountId.Id
Owner ID	OwnerId.Id
Owner Name	OwnerId.Name

Account-Based Marketing Opportunity Dataset

Label	Field
Account Industry	AccountId.Industry
Account Name	AccountId.Name
Account Owner ID	AccountId.OwnerId.Id
Amount	Amount
Close Date	CloseDate

Label	Field
Opportunity Name	Name
Owner Name	AccountId.OwnerId.Name

[Give Analytics Integration User Access to B2B Marketing Analytics](#)

The Analytics Integration User in your org facilitates the transfer of analytics data to B2B Marketing Analytics. For transfers to work properly, add field-level security to the Analytics Cloud Integration User profile.

[Set Field-Level Security for a Field on All Profiles](#)

Give Analytics Integration User Access to B2B Marketing Analytics

The Analytics Integration User in your org facilitates the transfer of analytics data to B2B Marketing Analytics. For transfers to work properly, add field-level security to the Analytics Cloud Integration User profile.

Pardot Grade and Pardot Score aren't standard fields. Install the Pardot AppExchange package to use these fields.

For each of these fields, set the field-level security to visible.

Object	Fields
Event	Type
Contact	Lead Source, Pardot Grade, Pardot Score

Set Field-Level Security for a Field on All Profiles

1. From Setup, open **Object Manager**, and then in the Quick Find box, enter the name of the object containing the field.
2. Select the object, and then click **Fields & Relationships**.
3. Select the field you want to modify.
4. Click **Set Field-Level Security**.
5. Specify the field's access level.
6. Save your changes.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

USER PERMISSIONS

To set field-level security:

- Manage Profiles and Permission Sets

AND

Customize Application

Multi-Touch Attribution Dashboard

Multi-Touch Attribution dashboards show you which marketing efforts are most influential during each stage of the purchase lifecycle. After you enable Connected Campaigns, engagement with Pardot's marketing assets and data from Sales Cloud appear together in one dashboard.

To use Multi-Touch Attribution dashboards, set up Connected Campaigns and Campaign Influence.

EDITIONS

Available in: Pardot **Plus**, **Advanced**, and **Premium** Editions. Available for additional cost in Pardot Pro and Ultimate Editions.

Dashboard Reference

Metric Label	Description	Origin
Revenue	Sum of revenue of all Salesforce campaigns	Multi-Touch Attribution dataset
Sum of Revenue Share (line graph)	Sum of revenue share showing datapoints for each month	Multi-Touch Attribution dataset
Total Value	Sum of value associated with all Salesforce campaigns	Multi-Touch Attribution dataset
ROI	Percentage of a campaign's actual cost compared to net revenue	Multi-Touch Attribution dataset
Actual Cost	Sum of actual cost associated with selected campaigns	Multi-Touch Attribution dataset
Top Salesforce Campaigns	Sum of revenue share, grouped by individual Salesforce campaign	Multi-Touch Attribution dataset
Revenue Share by Campaign Type	Sum of revenue share, grouped by Salesforce campaign type	Multi-Touch Attribution dataset

Dataset Reference

The dataset ID of this optional multi-touch attribution dataset is `pdMultiAttrib`.

Label	Field
Account	OpportunityId.AccountId.Name
Account Id	OpportunityId.AccountId
Campaign	CampaignId.Name
Campaign Actual Cost	CampaignId.ActualCost
Campaign Budgeted Cost	CampaignId.BudgetedCost
Campaign End Date	CampaignId.EndDate
Campaign ID	CampaignId

Label	Field
Campaign Influence ID	Id
Campaign Influence Model	ModelId.MasterLabel
Campaign Influence Model ID	ModelId
Campaign Start Date	CampaignId.StartDate
Contact	ContactId.Name
Contact First Name	ContactId.FirstName
Contact ID	ContactId
Contact Last Name	ContactId.LastName
Lead Source	ContactId.LeadSource
Opportunity	OpportunityId.Name
Opportunity ID	OpportunityId
Revenue	CimtaGenerated.TotalRevenue
Revenue Share	RevenueShare
ROI	CimtaGenerated.Roi
Stage Name	OpportunityId.StageName
Total Value	CimtaGenerated.TotalValue

[Enable Connected Campaigns](#)

When you enable Connected Campaigns in your Pardot Settings, decide which record types you want to connect from now on.

Enable Connected Campaigns

When you enable Connected Campaigns in your Pardot Settings, decide which record types you want to connect from now on.

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

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



Note:

- The Pardot B2BMA Integration user does not need the Pardot Marketing User role to enable and work with Connected Campaigns.
- Make sure that you create counterpart campaigns in Salesforce for Pardot's 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 Pardot 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 Pardot, identify a cut-off date for replication.

1. Open the Connected Campaigns page.

- In Pardot, open **Settings** and click **Edit**. Scroll to Connected Campaigns.
- In the Lightning app, click the **Pardot Settings** tab, and then select **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 Connected Campaigns setup process by giving Salesforce access to manage the campaigns.

1. In the same connector settings, select **Use Salesforce to manage all campaigns**.

2. If you want to reduce the number of campaigns that are replicated over time, enter a date under **Limit Campaign Creation by Date**.

3. To let Pardot users continue to see the remaining unconnected campaigns, select **Show Unconnected Campaigns**.

With the setting enabled, you can manage campaigns only in Salesforce. For details about the changes you can expect to see, read [Considerations for Connecting Pardot and Salesforce Campaigns](#).

EDITIONS

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

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

USER PERMISSIONS

To connect Pardot campaigns to Salesforce campaigns:

- General Account Administration
- AND
- Pardot Marketing User role
- AND
- B2B Marketing Automation App permission set license

Prospect and Activity Dataset

To identify which content influences prospects in your sales funnel, add the optional Prospect and Activity dataset. Create a lens using this dataset to dig straight down to the individual prospect record that acted on a certain asset.

To use the Prospect and Activity dataset, enable it in Marketing Setup and then select the optional dataset during the app setup in Tableau CRM Analytics Studio. In Marketing Setup, enter *Pardot* in the Quick Find box. Open the B2B Marketing Analytics setup page, and click **Enable Dataset** next to the Prospect Activity heading.

The Prospect and Activity dataset includes prospect demographic fields and fields that describe their associated engagement activity. Some metrics, such as email sends, don't appear in this dataset and are derived by other methods. As a result, prospect activity metric values in this dataset can vary from values in other datasets and dashboards.

EDITIONS

Available in: Pardot **Plus**, **Advanced**, and **Premium** Editions. Available for an extra cost in Pardot Pro and Ultimate Editions.

Account

Name of the account associated with prospect activity

Account ID

Salesforce identifier for the prospect's associated account

Account Name

Name of the prospect's associated account

Activity

Engagement activity type: click, view, success, or open

Activity Campaign ID

Salesforce identifier for the associated campaign

Activity Campaign Name

Campaign associated with the activity

Activity Date

Date and time the prospect engaged in the activity (UTC)

Address One

Address One field associated with the prospect

Address Two

Address Two field associated with the prospect

Annual Revenue

The prospect's associated company's annual revenue

Archived

True or false. Whether the prospect has been archived in Pardot.

Asset Activity

Combined label for asset and activity type: form view, form success, list email click, list email open, file view success, file view, custom URL click, landing page view, landing page success, form handler success, automated email click, automated email open, website visit, or priority page view

Asset ID

Salesforce identifier for the asset a prospect engaged with

Asset Name

The name of the asset a prospect engaged with: form, list email, file, custom URL, landing page, form handler, automated email, website, or priority page

Asset Type

The type of asset a prospect engaged with

Assigned User First Name

First name of the prospect's assigned Pardot user

Assigned User Full Name

Full name of the prospect's assigned Pardot user

Assigned User Last Name

Last name of the prospect's assigned Pardot user

CRM Contact FID

Salesforce identifier for the contact record associated with the prospect

CRM Lead FID

Salesforce identifier for the lead record associated with the prospect

CRM Owner FID

Salesforce identifier for the prospect owner

City

The prospect's city

Comments

The text of Pardot user comments associated with the prospect

Company

The prospect's company

Country

The prospect's country

Created by First Name

First name of the Pardot user who created the prospect

Created by Full Name

Full name of the Pardot user who created the prospect

Created by Last Name

Last name of the Pardot user who created the prospect

Department

The prospect's department

Email

The prospect's email address

Employees

Number of employees working at the prospect's company

External ID

Pardot identifier for the prospect.

Fax

The prospect's fax number

First Name

The prospect's first name

Full Name

The prospect's full name

Grade

The prospect's Pardot Grade

ID

Salesforce identifier for the prospect's associated lead or contact record. This field is used to match Pardot prospects to CRM leads and contacts.

Industry

The prospect's industry

Is Do Not Call

True or false. Whether the prospect can receive phone calls.

Is Do Not Email

True or false. Whether the prospect can receive emails

Job Title

The prospect's job title

Last Name

The prospect's last name

Name

The prospect's full name

Opted Out

True or false. Whether the prospect has opted out of marketing emails.

Pardot Account ID (external)

Pardot identifier for the prospect. This field is used to match Pardot prospects to CRM leads and contacts.

Pardot Activity ID

Pardot identifier for the activity. This field is used to match Pardot activity to prospects, leads, and contacts.

Pardot Asset ID

Pardot identifier for the asset a prospect engaged with

Phone

The prospect's phone number

Prospect Archived

True or false. Whether the prospect has been archived

Prospect Assigned Date

Date a prospect was assigned to a user (UTC)

Prospect CRM Last Activity Date

Date of the prospect's last recorded interaction with an asset (UTC)

Prospect Created At Date

Date the prospect was created in Pardot

Prospect ID (external)

Pardot identifier for the prospect. This field is used to match Pardot prospects to CRM leads and contacts.

Prospect Job Title

The prospect's job title

Prospect Last Activity Date

Date of the prospect's last activity recorded

Prospect Pardot Campaign Id

Pardot identifier for the first-touch (Pardot) campaign a prospect is associated with

Prospect Type

Type of record: Prospect, Lead, or Contact

Prospect Updated At Date

Date a prospect was last updated

Salutation

The prospect's preferred title

Score

The prospect's Pardot Score

Source

How the prospect was added to Pardot

Source Campaign

The name of the associated Pardot campaign

State

The prospect's state

Tags

Tags associated with the prospect

Territory

The prospect's territory

Updated by First Name

First name of the Pardot user who last updated the prospect

Updated by Last Name

Last name of the Pardot user who last updated the prospect

Website

Website URL associated with the prospect's company

Years In Business

Number of years the prospect's company has been in business

Zip

The prospect's ZIP code

Member Values for Recipes

When using recipes in B2B Marketing Analytics, use these labels and member values to map your fields.

Field Label: Asset Type

Form, "1"

List Email, "2"

Custom Url, "4"

Landing Page, "5"

Form Handler, "6"

Automated Email, "7"

Website Visit, "8"

Priority Page View, "9"

Field Label: Activity Type

Click, "1", "21"

View, "2"

Success, "4"

Open, "11"

Visit, "20"

Field Label: Asset Activity

Form View, "1 2"

Form Success, "1 4"

List Email Click, "2 1"

List Email Open, "2 11"

File View, "3 2"

Custom Url Click, "4 21"

Landing Page View, "5 2"

Landing Page Success, "5 4"

Form Handler Success, "6 4"

Automated Email Click, "7 1"

Automated Email Open, "7 11"

Website Visit, "8 20"

Priority Page View, "9 2"

Field Label: Prospect Type

Lead, "1"

Contact, "2"

Prospect, "3"

B2B Marketing Analytics Glossary

Familiarize yourself with common Tableau CRM Analytics Studio terminology.

Aggregate

A summary of the data based on a grouping. For example, sum of the amounts or count of rows of data, as in the initial exploration state.

App

In Tableau CRM, an app contains dashboards, lenses, and datasets in any combination that makes sense for sharing your data analysis with colleagues. Apps are like folders, and let users control sharing and organize their data projects.

Dashboard

A curated set of charts, metrics, and tables based on the data in one or more lenses.

Dataset

Contains a set of source data that is formatted and optimized for interactive exploration.

Dimension

A qualitative value, such as region, product name, or model number.

Filter

You can filter the data to narrow your results. For example, you can show only opportunities within a certain fiscal year. Filters included with B2B Marketing Analytics include:

- Date range
- Stage (Opportunity Stage)
- Tags (Pardot Tags)

Group

You can group the data by a specific dimension. For example: group by product name or account.

Lens

A particular view into a dataset's data. You use a lens to do exploratory analysis and visualization.

Measure

A quantitative value, such as revenue or exchange rate. You can do math on measures, such as calculate the total revenue or minimum exchange rate.

Template

A framework for analytics apps that comes preset with KPIs and visualizations.

Visualization

A visual representation of data, such as a chart, graph, comparison table, or pivot table.

[B2B Marketing Analytics Dashboards](#)

The B2B Marketing Analytics app includes prebuilt dashboards to meet the needs of everyone on the team. Each dashboard features several widgets that outline or visualize helpful metrics.

[B2B Marketing Analytics Datasets](#)

Several datasets become available when you set up B2B Marketing Analytics. In the B2B Marketing Analytics app, combine and filter the fields to create helpful metrics that tell you more about your marketing and sales performance.

B2B Marketing Analytics Dashboards

The B2B Marketing Analytics app includes prebuilt dashboards to meet the needs of everyone on the team. Each dashboard features several widgets that outline or visualize helpful metrics.



Note: Certain terms used in these descriptions can refer to fields in either Pardot or Salesforce.

- Monetary value is derived from the Value field on a Pardot opportunity.
- Cost is derived from the Cost field on a campaign in Pardot.
- Value in the Multi-Touch Attribution and Account-Based Marketing dashboards is derived from the Amount field on a Salesforce opportunity.
- Sales Activities in the Account-Based Marketing dashboard include all values from the Type field on your Event object.

EDITIONS

Available in: Pardot **Plus**, **Advanced**, and **Premium** Editions. Available for an extra cost in Pardot Pro and Ultimate Editions.

Marketing Manager Dashboard

The Marketing Manager dashboard offers many widgets and charts. In addition to the Pipeline Deals and Email Engagement widget collections, the dashboard includes charts that group and rank campaign and asset data.

Pipeline Deals Section

The metrics in this section use data from the [Opportunity dataset](#) on page 40, pdOpportunity, which combines data from Pardot and Salesforce.

Metric Label	Description	Formula	Origin
Opportunities in Pipeline	Number of opportunities not in Won or Lost stage	N/A	Opportunity dataset
Donut Chart (no label)	Total number of opportunities (center) and the number of opportunities in SQL, Won, and Lost stages (ring)	N/A	Opportunity dataset
Pipeline	Sum of monetary value associated with open opportunities	N/A	Opportunity dataset
Revenue	Sum of monetary value associated with opportunities in the Won stage	N/A	Opportunity dataset
Avg. Conversion to Close	Average close velocity in days	*Based on Closed/Won opportunities: Sum of difference between Opportunity Close Date and Opportunity Creation Date, divided by the number of Closed/Won opportunities	Opportunity dataset
Revenue by Campaign	Total revenue you can associate to individual campaigns	Based on campaigns that are associated with an opportunity: Monetary Value - Campaign Cost	Opportunity dataset

Email Engagement Widget

The metrics in this widget use data from the [Email dataset](#) on page 32, pdEmail, which primarily contains data from Pardot along with some CRM campaign and user information from Salesforce.

Metric Label	Description	Formula	Origin
Total Sent	Total number of emails sent	N/A	Email dataset
Hard Bounces	Total number of hard bounces	N/A	Email dataset
Unique CTR	Percentage of prospects who click links contained in emails delivered. Delivered equals sent emails minus bounces.	Unique clicks divided by total delivered	Email dataset
Unique Open Rate	Percentage of unique HTML opens compared to the total number of emails delivered.	Unique HTML opens divided by total delivered	Email dataset

Metric Label	Description	Formula	Origin
	Delivered equals sent emails minus bounces.		
Opt-Outs	Total number of prospects that have clicked the link to unsubscribe or that opted out of all email communications in the Email Preference Center.	N/A	Email dataset
SPAM Complaints	Total number of prospects that reported the email as spam	N/A	Email dataset

Other Charts

Revenue by Campaign

Donut chart showing the sum of monetary value of opportunities in the Won stage; grouped by campaign name. Stage values come from Salesforce.

Top Forms

Horizontal bar graph showing the top 10 forms based on the number of unique form submissions. Form data comes from Pardot.

Landing Page Completion

Donut chart showing the top 10 landing pages based on the number of unique landing page submissions. Landing Page data comes from Pardot.

Pipeline

The **Lifecycle Snapshot** area displays stages in your prospect lifecycle: Visitors, Prospects, MQLs, SQLs, and Closed Won. The number between two tiles represents the average number of days for people to move stage to stage. These values originate in the Prospect dataset, which combines data from Pardot and Salesforce.

After the **Pipeline Breakdown** section, are three graphs: Source Campaigns, Pipeline by Company, and Lead Sources. Each graph shows the monetary value that is associated with opportunities' individual campaigns, companies, and marketing channels. Stage revenue originates in Salesforce.

Pipeline Breakdown Widget

The metrics in this widget use data from the [Opportunity dataset](#) on page 40, pdOpportunity, and the [Campaign dataset](#) on page 32, pdCampaign, which combine data from Pardot and Salesforce.

Metric Label	Description	Formula
Total Value	Sum of monetary value associated with opportunities not in Won or Lost stage	N/A
Opportunities in Pipeline	Count of all opportunities not in Won or Lost stage	N/A
Cost	Sum of costs associated with selected campaigns	Sum of actual cost values for selected campaigns
Revenue	Sum of monetary value associated with opportunities in the Won stage	N/A

Metric Label	Description	Formula
Visitor Conversion Rate	Percentage of new prospects compared to total visitors	(Prospects divided by visitors) * 100
Opportunity Win Rate	Percentage of won opportunities compared to closed opportunities	(Closed opportunities divided by Won opportunities) * 100
ROI	Percentage of campaign cost compared to net revenue	(Total revenue divided by the sum of actual cost fields for campaigns) * 100

Engagement



Note: Some values are used in more than one widget.

List Email Engagement Widget and Email Template Widget

Metric descriptions are the same for both tables. Origin for List Email widget data is the [Email dataset](#) on page 32, pdEmail. Origin for Email Template widget data is the [Email Template dataset](#) on page 35, pdEmailTemplate.

Metric Label	Description	Formula
List Emails Sent	Total number of emails sent	N/A
Total Opens	Total number of emails opened	N/A
Unique Open Rate	Percentage of unique opens based on delivered emails	Unique HTML opens divided by (Sent emails - bounces) * 100
Unique Opens	Total number of prospects who opened the email	N/A
Total CTR	Percentage of visitors who click links contained in emails delivered. Delivered equals sent emails minus bounces.	N/A
Spam Rate	Percentage of spam complaints received on all emails sent	Spam complaints divided by sent emails
Opt-Outs	Total number of prospects that don't want to receive marketing email	Prospects that clicked Unsubscribe + Prospects who opted out in Email Preference Center
Bounce Rate	Percentage of emails that bounced	Bounced emails divided by Sent emails
Unique Clicks	Number of unique clicks	N/A
Total Bounces	Number of emails that didn't arrive in email inboxes	Includes soft bounces and hard bounces

Forms Engagement Widget

The metrics in this widget use data from the [Forms and Form Handlers dataset](#) on page 37, pdFormAndHandler, which primarily contains data from Pardot along with some CRM campaign and user information from Salesforce.

Metric Label	Description	Formula
Total Submission Rate	Percentage of how often forms are completed	Form submissions divided by total form views
Form Conversion Rate	Percentage of visitors who convert via forms	Visitor-to-prospect conversions divided by total form submissions
Total Views	Number of form views	N/A
Total Submissions	Number of forms completed	N/A
Form Submissions	Number of form submissions	N/A
Handler Submissions	Number of forms submitted via form handler	N/A

Landing Page Engagement Widget

The metrics in this widget use data from the [Landing Page dataset](#) on page 38, pdLandingPage, which primarily contains data from Pardot along with some CRM campaign and user information from Salesforce.

Metric Label	Description	Formula
Unique Views	Number of unique landing page views	N/A
Total Submission Rate	Percentage of submitted landing pages	Landing page submissions divided by landing page views
Total Views	Number of landing page views	N/A
Total Submissions	Number of landing page submissions	N/A

Multi-Touch Attribution

High-level metrics and two charts are available on the Multi-Touch Attribution dashboard. Choose an Influence Model from the dropdown to see an attribution breakdown that works for you.

Metric Label	Description	Origin
Revenue	Sum of revenue of all Salesforce campaigns	Multi-Touch Attribution dataset
Sum of Revenue Share (line graph)	Sum of revenue share showing datapoints for each month	Multi-Touch Attribution dataset
Total Value	Sum of value associated with all Salesforce campaigns	Multi-Touch Attribution dataset
ROI	Percentage of a campaign's actual cost compared to net revenue	Multi-Touch Attribution dataset
Actual Cost	Sum of actual cost associated with selected campaigns	Multi-Touch Attribution dataset

Metric Label	Description	Origin
Top Salesforce Campaigns	Sum of revenue share, grouped by individual Salesforce campaign	Multi-Touch Attribution dataset
Revenue Share by Campaign Type	Sum of revenue share, grouped by Salesforce campaign type	Multi-Touch Attribution dataset

Account-Based Marketing

The Account-Based Marketing dashboard includes an Account Details table alongside pipeline, opportunity, and sales activities charts. Choose an account to filter available widgets, and see the opportunity table update with historical information associated with the selected account.

Accounts Details Widget

Metric Label	Description	Origin
Pipeline Value	Sum of monetary value associated with opportunities in the SQL stage for the selected accounts	ABM Opportunity dataset
Open Opportunities	Number of open opportunities associated with the selected accounts	ABM Opportunity dataset
Contacts	Number of contacts associated with selected accounts	ABM Contact dataset
Avg. Engagement Score	Sum of Pardot Scores divided by the number of scored contacts associated with the selected accounts	ABM Contact dataset
Sales Events	Number of sales activities for the selected accounts	ABM Event dataset

Other Charts

Pipeline Value by Account

Horizontal bar graph showing the sum of monetary value associated with opportunities in the SQL stage

Engagement Score by Account

Horizontal stacked graph showing the average engagement score per account

Sales Events by Account

Horizontal stacked graph showing the number of sales activities

Opportunities: Revenue Win Percentage

Donut chart showing percent of revenue won versus lost. Uses opportunity record from Salesforce.

Opportunities: Stage Value by Account

Horizontal stacked graph showing the sum of monetary value for each account, grouped by pipeline stage. Uses opportunity record from Salesforce.

Opportunities: Table

Table of data associated with selected accounts: account name, opportunity name, owner name, amount, account industry, and close date. To open an action menu, click an account, opportunity, or owner name.

Sales Activities: Time Spent on Events

Horizontal bar graph showing the sum of hours that opportunity owners have spent on activities associated with the selected accounts

Sales Activities: Number of Sales Events

Donut chart showing the number of activities that opportunity owners have spent on activities associated with the selected accounts

B2B Marketing Analytics Datasets

Several datasets become available when you set up B2B Marketing Analytics. In the B2B Marketing Analytics app, combine and filter the fields to create helpful metrics that tell you more about your marketing and sales performance.

The tables include label and field text. When you create or edit queries by hand in Tableau CRM Analytics Studio, use the value in the field text column.



Note: Dates and times are returned in Coordinated Universal Time (UTC) unless otherwise noted.

EDITIONS

Available in: Pardot **Plus**, **Advanced**, and **Premium** Editions. Available for an extra cost in Pardot Pro and Ultimate Editions.

Pardot Campaign Dataset

The dataset ID of this dataset is `pdCampaign`. Each row of this dataset represents an individual Pardot campaign. Any connected Pardot campaign includes a Campaign ID (CRM) value, which corresponds to its Salesforce counterpart.

Label	Field	Description	Origin
Campaign Date	<code>campaign_date</code>	Date the campaign is created in Pardot	Pardot
Campaign ID (CRM)	<code>campaign_crm_id</code>	Associated Salesforce campaign ID	Salesforce
Campaign ID (external)	<code>campaign_id</code>	Pardot campaign ID	Pardot
Cost	<code>cost</code>	Total cost of Pardot campaign (currency based on account locale)	Pardot
Name	<code>campaign_name</code>	Name of Pardot campaign	Pardot
Tags	<code>tags</code>	Pardot tags associated with the campaign	Pardot

Pardot Email Dataset

The dataset ID of this dataset is `pdEmail`. Each row of this dataset represents one day of statistics for an individual Pardot list email. List emails associated with a connected campaign include values labeled (CRM), which correspond to the counterpart Salesforce campaign.

Label	Field	Description	Origin
Bounce Rate	bounce_rate	Percentage of total bounces compared to emails sent	Pardot
Campaign	campaign_name	Associated campaign name	Pardot
Campaign ID (CRM)	campaign_crm_id	Associated Salesforce campaign ID	Salesforce
Campaign ID (external)	campaign_id	Associated Pardot campaign ID	Pardot
Click To Open Ratio	click_to_open_rate	Percentage of unique link clicks compared to unique HTML opens, totaled by day	Pardot
Created At Date	created_at	Date the email is created in Pardot	Pardot
Created By	created_by	First and last name of Pardot user who created the email	Pardot
Created By - User ID (CRM)	created_by_crm_id	Salesforce user ID of associated Pardot user who created the email	Salesforce
Delivery Rate	delivery_rate	Percentage of emails delivered compared to emails sent, totaled by day	Pardot
Email ID	email_id	Pardot email ID	Pardot
HTML Open Rate	html_open_rate	Percentage of unique HTML opens compared to emails delivered, totaled by day	Pardot
Name	email_name	Name of the email	Pardot
Opt Out Rate	opt_out_rate	Percentage of opt outs compared to emails delivered, totaled by day	Pardot
Sent On Date	sent_at	Date the email is sent	Pardot
Sent To	sent_to	Names of Pardot lists the email is sent to	Pardot
Spam Complaint Rate	spam_complaint_rate	Percentage of spam complaints compared to emails delivered, totaled by day	Pardot
Stats Date	stats_date	Date the email statistics are pulled	Pardot
Stats ID	stats_id	Stats ID of the email	Pardot
Subject	subject	Subject line of the email	Pardot

Label	Field	Description	Origin
Suppressed From	suppressed_from	Names of Pardot lists the email cannot be sent to	Pardot
Tag	tags	Pardot tags associated with the email	Pardot
Total Bounced	total_bounced	Sum of soft-bounced and hard-bounced emails, totaled by day	Pardot
Total Clicks	total_clicks	Number of link clicks, totaled by day	Pardot
Total CTR	total_ctr	Percentage of link clicks compared to emails delivered, totaled by day	Pardot
Total Delivered	delivered	Number of emails delivered, totaled by day	Pardot
Total Hard Bounced	hard_bounced	Number of emails that hard bounced, totaled by day	Pardot
Total HTML Opens	total_html_opens	Number of HTML opens, totaled by day	Pardot
Total Opt Outs	opt_outs	Number of opt outs, totaled by day	Pardot
Total Queued	queued	Number of emails queued, totaled by day	Pardot
Total Sent	sent	Number of emails sent, totaled by day	Pardot
Total Soft Bounced	soft_bounced	Number of emails that soft bounced, totaled by day	Pardot
Total Spam Complaints	spam_complaints	Number of spam complaints, totaled by day	Pardot
Unique Clicks	unique_clicks	Number of unique link clicks, totaled by day	Pardot
Unique CTR	unique_ctr	Percentage of unique clicks compared to emails delivered, totaled by day	Pardot
Unique HTML Opens	unique_html_opens	Number of unique HTML opens, totaled by day	Pardot
Updated At Date	updated_at	Date the email is last updated in Pardot	Pardot

Label	Field	Description	Origin
Updated By	updated_by	First and last name of Pardot user who edited the email most recently	Pardot
Updated By - User ID (CRM)	updated_by_crm_id	Salesforce user ID of associated Pardot user who edited the email most recently	Salesforce

Pardot Email Template Dataset

The dataset ID of this dataset is `pdEmailTemplate`. Each row of this dataset represents one day of statistics for an individual Pardot email template. Email templates associated with a connected campaign include values labeled (CRM), which correspond to the counterpart Salesforce campaign.



Note: Email metrics in this dataset are total values based on the emails associated only with the email template.

Label	Field	Description	Origin
Bounce Rate	bounce_rate	Percentage of unique link clicks compared to unique HTML opens, totaled by day	Pardot
Campaign	campaign_name	Name of Pardot campaign associated with the email template	Pardot
Campaign ID (CRM)	campaign_crm_id	Associated Salesforce campaign ID	Salesforce
Campaign ID (external)	campaign_id	Associated Pardot campaign ID	Pardot
Created At Date	created_at	Date the email template is created in Pardot	Pardot
Delivery Rate	delivery_rate	Percentage of emails delivered compared to emails sent, totaled by day	Pardot
Email Template ID	email_template_id	Pardot email template ID	Pardot
Open Rate	html_open_rate	Percentage of unique HTML opens compared to emails delivered, totaled by day	Pardot
Name	email_template_name	Name of email template in Pardot	Pardot
Opt Out Rate	opt_out_rate	Percentage of opt outs compared to emails delivered, totaled by day	Pardot

Label	Field	Description	Origin
Sender	sender	Name in "From" field of the email template	Pardot
Spam Complaint Rate	spam_complaint_rate	Percentage of spam complaints compared to emails delivered, totaled by day	Pardot
Stats Date	stats_date	Date the email template statistics are pulled	Pardot
Stats ID	stats_id	Stats ID of the email template	Pardot
Subject	subject	Subject line of the email template	Pardot
Tag	tags	Pardot tags associated with the email template	Pardot
Total Bounces	total_bounces	Sum of soft-bounced and hard-bounced emails, totaled by day	Pardot
Total Clicks	total_clicks	Number of link clicks, totaled by day	Pardot
Total CTR	total_ctr	Percentage of link clicks compared to emails delivered, totaled by day	Pardot
Total Delivered	total_delivered	Number of emails delivered, totaled by day	Pardot
Total Hard Bounced	total_hard_bounced	Number of emails that hard bounced, totaled by day	Pardot
Total HTML Opens	total_html_opens	Number of HTML opens, totaled by day	Pardot
Total Opt Outs	opt_outs	Number of opt outs, totaled by day	Pardot
Total Queued	queued	Number of opt outs, totaled by day	Pardot
Total Sent	sent	Number of emails sent, totaled by day	Pardot
Total Soft Bounced	total_soft_bounced	Number of emails that soft bounced, totaled by day	Pardot
Total Spam Complaints	spam_complaints	Number of spam complaints, totaled by day	Pardot

Label	Field	Description	Origin
Type	type	Type of email template: HTML or Text	Pardot
Unique Clicks	unique_clicks	Number of unique link clicks, totaled by day	Pardot
Unique CTR	unique_ctr	Percentage of unique clicks compared to emails delivered, totaled by day	Pardot
Updated At Date	updated_at	Date the email template is last updated in Pardot	Pardot

Pardot Form and Form Handler Dataset

The dataset ID of this dataset is `pdFormAndHandler`. Each row of this dataset represents one day of statistics for an individual Pardot form or form handler. Assets associated with a connected campaign include values labeled (CRM), which correspond to the counterpart Salesforce campaign.

Label	Field	Description	Origin
Campaign	campaign_name	Associated campaign name	Pardot
Asset ID	asset_id	Pardot asset ID	Pardot
Campaign ID (CRM)	campaign_crm_id	Associated Pardot campaign ID	Salesforce
Campaign ID (external)	campaign_id	Associated Salesforce campaign ID	Pardot
Conversions	conversion	Number of conversions, totaled by day	Pardot
Name	asset_name	Name of Pardot asset	Pardot
Stats Date	stats_date	Date the form and form handler statistics are pulled	Pardot
Tags	tags	Pardot tags associated with the email	Pardot
Total Clicks	total_clicks	Number of link clicks, totaled by day	Pardot
Total Conversion Rate	total_conversion_rate	Percentage of conversions compared to form and form handler submissions, totaled by day	Pardot
Total Error Rate	total_error_rate	Percentage of errors compared to form and form handler submissions, totaled by day	Pardot

Label	Field	Description	Origin
Total Errors	total_errors	Number of errors, totaled by day	Pardot
Total Submission Rate	total_submission_rate	Percentage of submissions compared to form and form handler views, totaled by day	Pardot
Total Submissions	total_submissions	Number of form and form handler submissions, totaled by day	Pardot
Total Views	total_views	Number form and form handler views, totaled by day	Pardot
Type	asset_type	Type of asset: Form or Form Handler	Pardot
Unique Clicks	unique_clicks	Number of unique link clicks, totaled by day	Pardot
Unique Errors	unique_errors	Number of unique errors, totaled by day	Pardot
Unique Submissions	unique_submissions	Number of unique submissions, totaled by day	Pardot
Unique Views	unique_views	Number of unique views, totaled by day	Pardot

Pardot Landing Page Dataset

The dataset ID of this dataset is `pdLandingPage`. Each row of this dataset represents one day of statistics for an individual Pardot landing page. Assets associated with a connected campaign include values labeled (CRM), which correspond to the counterpart Salesforce campaign.

Label	Field	Description	Origin
Campaign	campaign_name	Associated campaign name	Pardot
Campaign ID (CRM)	campaign_crm_id	Associated Pardot campaign ID	Pardot
Campaign ID (external)	campaign_id	Associated Salesforce campaign ID	Salesforce
Conversions	conversion	Associated Salesforce campaign ID	Pardot
Created	created_at	Date the landing page is created in Pardot	Pardot
Created By	created_by	First and last name of Pardot user who created the email	Pardot

Label	Field	Description	Origin
Created By - User ID (CRM)	created_by_crm_id	Salesforce user ID of associated Pardot user who created the email	Salesforce
Form	form_name	Name of the included form, if applicable	Pardot
Name	landing_page_name	Name of the landing page	Pardot
Short URL	short_url	Short URL of the landing page	Pardot
Stats Date	stats_date	Date the landing page statistics are pulled	Pardot
n/a	submissionRate	Percentage of submissions compared to landing page views, totaled by day. (Hidden)	Pardot
Tags	tags	Pardot tags associated with the landing page	Pardot
Total Clicks	total_clicks	Number of link clicks, totaled by day	Pardot
Total Errors	total_errors	Number of form errors, totaled by day	Pardot
Total Submissions	total_submissions	Number of form and landing page submissions, totaled by day	Pardot
Total Views	total_views	Number of landing page views, totaled by day	Pardot
Unique Clicks	unique_clicks	Number of unique link clicks, totaled by day	Pardot
Unique Errors	unique_errors	Number of unique form errors, totaled by day	Pardot
Unique Submissions	unique_submissions	Number of unique submissions, totaled by day	Pardot
Unique Views	unique_views	Number of unique landing page views, totaled by day	Pardot
Updated	updated_at	Date the landing page is last updated	Pardot
Updated By	updated_by	First and last name of Pardot user who edited the landing page most recently	Pardot

Label	Field	Description	Origin
Updated By - User ID (CRM)	created_by_crm_id	Salesforce user ID of associated Pardot user who edited the landing page most recently	Salesforce
URL	url	Full URL of the landing page	Salesforce

Pardot Opportunity Dataset

The dataset ID of this dataset is `pdOpportunity`. Each row of this dataset represents an individual Pardot opportunity. Opportunities associated with a connected campaign include values labeled (CRM), which correspond to the counterpart Salesforce campaign.

Label	Field	Description	Origin
Account ID (CRM)	account_crm_id	Account ID the prospect or lead is assigned to	Salesforce
Pardot Campaign	campaign_name	Name of a Pardot campaign the prospect is assigned to	Pardot
Campaign Date	campaign_date	Date and time the campaign is created in Pardot	Pardot
Campaign Cost	campaign_cost	Campaign cost amount associated with the opportunity. Currency based on Pardot account's locale setting.	Pardot
CRM Campaign ID	campaign_crm_id	Salesforce ID of opportunity's associated Pardot campaign	Salesforce
Pardot Campaign ID	campaign_id	Pardot ID for the opportunity's associated campaign	Pardot
Close Date	close_date	Date and time that the opportunity is closed	Pardot
Monetary Value	monetary_value	Dollar amount of the opportunity's value. Currency based on Pardot account's locale setting.	Pardot
Opportunity Created Date	opportunity_date	Date and time the opportunity is created in Salesforce	Pardot
CRM Opportunity ID	opportunity_crm_id	Salesforce ID of the opportunity	Salesforce
Pardot Opportunity ID	opportunity_id	Pardot ID of the opportunity	Pardot
Opportunity Status	opportunity_status	Status of the opportunity: Open, Won, or Lost	Salesforce

Label	Field	Description	Origin
Opportunity Stage	opportunity_stage	Lifecycle stage of the opportunity in Salesforce	Salesforce
Opportunity Type	opportunity_type	Type of opportunity, from Salesforce	Salesforce
Opportunity Name	opportunity_name	Name of the opportunity in Salesforce	Salesforce
Opportunity Probability	opportunity_probability	Percentage of estimated confidence in closing the opportunity, from Salesforce	Salesforce
Tags	tags	Pardot tags associated with the opportunity	Pardot

Pardot Prospect Dataset

The dataset ID of this dataset is `pdProspect`. Each row of this dataset represents a unique Pardot prospect. Prospects associated with a lead or contact in Salesforce include values labeled (CRM).

Label	Field	Description	Origin
Account Name	account_name	Prospect's account name	Pardot
Address One	address_one	Prospect's address, line one	Pardot
Address Two	address_two	Prospect's address, line two	Pardot
Annual Revenue	annual_revenue	Annual revenue for prospect's company	Pardot
Is Archived	is_archived	Indicates whether the prospect record is in the recycle bin: True or False	Pardot
Assigned Date	assigned_date	Date and time that prospect is assigned to a user	Pardot
Is Assigned	is_assigned	Indicates whether the prospect is assigned to a user: true or false	Pardot
Assigned User First Name	assigned_user_first_name	First name of the prospect's assigned user	Pardot
Assigned User Full Name	assigned_user_full_name	First and last name of the prospect's assigned user	Pardot
Assigned User Last Name	assigned_user_last_name	Last name of the prospect's assigned user	Pardot
City	city	Prospect's city	Pardot
Comments	comments	User comments about the prospect	Pardot
Company	company	Prospect's company name	Pardot

Label	Field	Description	Origin
Country	country	Prospect's country	Pardot
Created At Date	created_at_date	Date and time that prospect is created	Pardot
Created by First Name	created_by_first_name	First name of the user who created the prospect	Pardot
Created by Full Name	created_by_full_name	First and last name of the user who created the prospect	Pardot
Created By Last Name	created_by_last_name	Last name of the user who created the prospect	Pardot
CRM Account ID	account_crm_id	Salesforce ID for the prospect's account	Salesforce
CRM Contact ID	crm_contact_fid	Salesforce ID for prospect's synced contact	Salesforce
CRM Lead/Contact ID	contact_crm_id	Salesforce ID of prospect's assigned lead or contact record	Salesforce
CRM Last Activity Date	crm_last_activity_date	Date and time of last activity in Salesforce on the prospect's lead or contact record	Salesforce
CRM Lead ID	crm_lead_fid	Salesforce ID for prospect's synced lead	Salesforce
CRM Owner ID	crm_owner_fid	Salesforce ID for the prospect's assigned user	Salesforce
Department	department	Prospect's department	Pardot
Email	email	Prospect's email address	Pardot
Employees	employees	Number of employees who work at the company	Pardot
Fax	fax	Prospect's fax number	Pardot
First Name	first_name	Prospect's first name	Pardot
First Visit Date	first_visitor_date	Date and time of first visitor activity. Identified by IP address and associated to prospect with email address.	Pardot
Full Name	full_name	Prospect's first and last name	Pardot
Pardot Grade	grade	Prospect's Pardot Grade	Pardot
Industry	industry	Type of industry for prospect's company	Pardot
Is Do Not Call	is_do_not_call	Indicates whether prospect has fully opted out of phone calls: true or false	Pardot
Is Do Not Email	is_do_not_email	Indicates whether the prospect has opted out of all email types: true or false	Pardot
Job Title	job_title	Prospect's job title	Pardot
Last Activity Date	last_activity_date	Date and time that prospect last interacted with a marketing asset	Pardot
Last Name	last_name	Prospect's last name	Pardot

Label	Field	Description	Origin
Most Recent Visitor Date	most_recent_visitor_date	Date and time of most recent visitor activity. Identified by different IP address and associated to prospect with the same email address.	Pardot
MQL Date	mql_date	Date and time that the prospect is assigned to the MQL stage	Pardot
Opted Out	opted_out	Indicates whether the prospect has opted out of marketing emails: true or false	Pardot
Pardot Account ID	pardot_account_id	Pardot account ID associated with the B2B Marketing Analytics app	Pardot
Pardot Visitor ID	visitor_id	Prospect's Pardot visitor ID	Pardot
Phone	phone	Prospect's phone number	Pardot
Pardot Prospect ID	id	Prospect's Pardot ID	Pardot
Salutation	salutation	Prospect's preferred title, as a picklist	Pardot
Pardot Score	score	Prospect's Pardot Score	Pardot
Source Campaign	source_campaign	Vendor name and source type that indicates prospect's original source. See How a Prospect's Source Field Is Populated	Pardot
Source	source	Campaign associated with prospect's first touch	Pardot
Stage	stage	Prospect's stage in Pardot lifecycle	Pardot
State	state	Prospect's state	Pardot
Tags	tags	Pardot tags associated with the prospect	Pardot
Territory	territory	Prospect's territory	Pardot
Updated At Date	updated_at_date	Date and time that the prospect was updated	Pardot
Updated By First Name	updated_by_first_name	First name of the user who last updated the prospect	Pardot
Updated By Last Name	updated_by_last_name	Last name of the user who last updated the prospect	Pardot
Website	website	URL of the prospect's company website	Pardot
Years In Business	years_in_business	Length of time the prospect's company has been in business	Pardot
Zip	zip	Prospect's ZIP code	Pardot

Prospect and Activity Dataset

The dataset ID of this dataset is `pdProspectActivity`. Each row of this dataset represents a unique engagement activity and data associated with the prospect who performed it.



Note: 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.

Label	Field	Description	Values	Origin
Account	AccountName	Prospect's Pardot account name	n/a	Pardot
Account ID	AccountId	Salesforce ID for prospect's associated Salesforce account	n/a	Pardot
Account Name	Prospect.account_name	Prospect's Pardot account name	n/a	Pardot
Activity	ActivityType	Type of engagement activity	<ul style="list-style-type: none"> Click View Success Open Visit 	Pardot
Activity Campaign ID	ActivityCampaignId	Salesforce ID for associated Salesforce campaign	n/a	Pardot
Activity Campaign Name	ActivityCampaignName	Name of associated Salesforce campaign	n/a	Pardot
Activity Date	ActivityDate	Date and time of engagement activity	n/a	Pardot
Address One	Prospect.address_one	Prospect's address, line one	n/a	Pardot
Address Two	Prospect.address_two	Prospect's address, line two	n/a	Pardot
Annual Revenue	Prospect.annual_revenue	Annual revenue for prospect's company	n/a	Pardot
Archived	Prospect.is_archived	Indicates whether the prospect record is in the recycle bin	<ul style="list-style-type: none"> True False 	Pardot
Asset Activity	AssetActivity	Combined value representing the asset type and activity type in one field	<ul style="list-style-type: none"> Form View Form Success List Email Click List Email Open File View Custom Url Click Landing Page View 	Pardot

Label	Field	Description	Values	Origin
			<ul style="list-style-type: none"> • Landing Page Success • Form Handler Success • Automated Email Click • Website Visit • Priority Page View 	
Asset ID	AssetId	Salesforce ID of asset		Pardot
Asset Name	AssetName	Name of asset		Pardot
Asset Type	AssetType	Type of asset	<ul style="list-style-type: none"> • Form • List Email • File • Custom Url • Landing Page • Form Handler • Automated Email • Website Visit • Priority Page View 	Pardot
Assigned User First Name	Prospectassigned_user_first_name	First name of the prospect's assigned user	n/a	Pardot
Assigned User Full Name	Prospectassigned_user_full_name	First and last name of the prospect's assigned user	n/a	Pardot
Assigned User Last Name	Prospectassigned_user_last_name	Last name of the prospect's assigned user	n/a	Pardot
City	Prospect.city	Prospect's city	n/a	Pardot
Comments	Prospect.comments	User comments about the prospect	n/a	Pardot
Company	Prospect.company	Prospect's company name	n/a	Pardot
Country	Prospect.country	Prospect's country	n/a	Pardot
Created By First Name	Prospectcreated_by_first_name	First name of the user who created the prospect	n/a	Pardot
Created By Full Name	Prospectcreated_by_full_name	First and last name of the user who created the prospect	n/a	Pardot

Label	Field	Description	Values	Origin
Created By Last Name	Prospect.created_by_last_name	Last name of the user who created the prospect	n/a	Pardot
CRM Lead FID	Prospect.crm_lead_fid	Salesforce ID for prospect's synced lead	n/a	Salesforce
CRM Owner FID	Prospect.crm_owner_fid	Salesforce ID for the prospect's assigned user	n/a	Salesforce
Department	Prospect.department	Prospect's department	n/a	Pardot
Email	Prospect.email	Prospect's email address	n/a	Pardot
Employees	Prospect.employees	Number of employees who work at the prospect's company	n/a	Pardot
External ID	ActorExternalId	Prospect's Pardot ID	n/a	Pardot
Fax	Prospect.fax	Prospect's fax number	n/a	Pardot
First Name	Prospect.first_name	Prospect's first name	n/a	Pardot
Full Name	Prospect.full_name	Prospect's first and last name	n/a	Pardot
Grade	Prospect.grade	Prospect's Pardot Grade	n/a	Pardot
ID	ActorId	Salesforce ID of prospect's assigned lead or contact record	n/a	Pardot
Industry	Prospect.industry	Type of industry for prospect's company	n/a	Pardot
Is Do Not Call	Prospect.is_do_not_call	Indicates whether prospect has opted out of phone calls	<ul style="list-style-type: none"> • True • False 	Pardot
Is Do Not Email	Prospect.is_do_not_email	Indicates whether the prospect has opted out of all email types	<ul style="list-style-type: none"> • True • False 	Pardot
Job Title	Prospect.job_title	Prospect's job title	n/a	Pardot
Last Name	Prospect.last_name	Prospect's last name	n/a	Pardot
Name	ActorName	Prospect's full name	n/a	Pardot
Opted Out	Prospect.opted_out	Indicates whether the prospect has opted out of marketing emails	<ul style="list-style-type: none"> • True • False 	Pardot
Pardot Activity ID	ActivityExternalId	Pardot ID for unique activity	n/a	Pardot

Label	Field	Description	Values	Origin
Pardot Asset ID	AssetExternalId	Pardot ID for asset	n/a	Pardot
Phone	Prospect.phone	Prospect's phone number	n/a	Pardot
Prospect Account ID (external)	Prospect.pardot_account_id	Pardot account ID associated with the B2B Marketing Analytics app	n/a	Pardot
Prospect Archived	ProspectIsArchived	Indicates whether the prospect has been archived	<ul style="list-style-type: none"> • True • False 	Pardot
Prospect Assigned Date	Prospect.assigned_date	Date and time that prospect is assigned to a user	Prospectassigned_date_Year, Prospectassigned_date_Month, Prospectassigned_date_Day	Pardot
Prospect Created At Date	Prospect.created_at_date	Date and time that prospect is created	Prospectcreated_at_date_Year, Prospectcreated_at_date_Month, Prospectcreated_at_date_Day	Pardot
Prospect CRM Last Activity Date	Prospect.crm_last_activity_date	Date and time of last activity in Salesforce on the prospect's lead or contact record	Prospectcrm_last_activity_date_Year, Prospectcrm_last_activity_date_Month, Prospectcrm_last_activity_date_Day	Salesforce
Prospect ID (external)	Prospect.id	Prospect's Pardot ID	n/a	Pardot
Prospect Job Title	Prospect.JobTitle	Prospect's job title	n/a	Pardot
Prospect Last Activity Date	Prospect.last_activity_date	Date and time that prospect last interacted with a marketing asset	Prospectlast_activity_date_Year, Prospectlast_activity_date_Month, Prospectlast_activity_date_Day	Pardot
Prospect Pardot Campaign Id	ProspectCampaignExternalId	Pardot ID for the prospect's first-touch campaign	n/a	Pardot
Prospect Type	ActorType	Type of record	<ul style="list-style-type: none"> • Lead • Contact • Prospect 	Pardot, Salesforce
Prospect Updated At Date	Prospect.updated_at_date	Date and time that the prospect was updated	Prospectupdated_at_date_Year, Prospectupdated_at_date_Month, Prospectupdated_at_date_Day	Pardot
Salutation	Prospect.salutation	Prospect's preferred title	Picklist	Pardot
Score	Prospect.score	Prospect's Pardot Score	n/a	Pardot
Source	Prospect.source	Pardot campaign associated with prospect's first touch	n/a	Pardot

Label	Field	Description	Values	Origin
Source Campaign	Prospect.source_campaign	Vendor name and source type that indicates prospect's original source	n/a	Pardot
State	Prospect.state	Prospect's state of residence	n/a	Pardot
Tags	Prospect.tags	Pardot tags associated with the prospect	n/a	Pardot
Territory	Prospect.territory	Prospect's territory of residence	n/a	Pardot
Updated By First Name	Prospect.updated_by_first_name	First name of the user who last updated the prospect	n/a	Pardot
Updated By Last Name	Prospect.updated_by_last_name	Last name of the user who last updated the prospect	n/a	Pardot
Website	Prospect.website	URL of the prospect's company website	n/a	Pardot
Years In Business	Prospect.years_in_business	Length of time the prospect's company has been in business	n/a	Pardot
Zip	Prospect.zip	Prospect's ZIP code	n/a	Pardot

Pardot Tags Dataset

Each row of this dataset represents a unique, assigned Pardot tag.

Label	Field	Origin
Name	tag_name	Pardot

Pardot Users Dataset

The ID of this dataset is `pdUser`. It's used in app templates with Object Sync for Pardot only. Each row of this dataset represents one Pardot user.

Label	Field	Origin
Created At Date	created_at	Pardot
Email	email	Pardot
First Name	first_name	Pardot

Label	Field	Origin
Full Name	full_name	Pardot
Is Archived	is_archived	Pardot
Job Title	job_title	Pardot
Last Name	last_name	Pardot
Updated At Date	updated_at	Pardot
User ID (external)	user_id	Pardot
Username	username*	Pardot

* The username field can contain a Pardot or Salesforce username. If a Salesforce username is available, it's shown instead of the Pardot username.

Pardot Visitor Dataset

The ID of this dataset is `pdVisitor`. Each row of this dataset represents one day of statistics for an individual Pardot visitor.

Label	Field	Origin
Campaign Name	campaign_name	Pardot
Campaign ID (CRM)	campaign_crm_id	Salesforce
Campaign ID (external)	campaign_id	Pardot
Stage	stage	Pardot
Stats Date	stats_date	Pardot
Tags	tags	Pardot
Visitor Count	visitor_count	Pardot

Account-Based Marketing Datasets

B2B Marketing Analytics features optional account-based marketing offerings that come from three datasets.

Account-Based Marketing Contact

The dataset ID of this optional account-based marketing dataset is `pdAbmContact`. Each row of this dataset represents an individual Salesforce contact.

Label	Field
Account Name	AccountId.Name
Contact Pardot Score	WhoId.pi__score__c

Account-Based Marketing Event

The dataset ID of this optional account-based marketing dataset is `pdAbmEvent`. Each row of this dataset represents an individual Salesforce event. This data originates in the Email object and pulls records for events that have passed. Event types include Call, Email, Meeting, Prep, and Other.

Label	Field
Account Name	AccountId.Name
Contact ID	WhoId.ID
Contact Name	WhoId.Name
Contact Pardot Grade	WhoId.pi__grade__c
Contact Pardot Score	WhoId.pi__score__c
Contact Title	WhoId.Title
Duration	DurationInMinutes
Event Account ID	AccountId.Id
Owner ID	OwnerId.Id
Owner Name	OwnerId.Name

Account-Based Marketing Opportunity

The dataset ID of this optional account-based marketing dataset is `pdAbmOpp`. Each row of this dataset represents an individual Salesforce opportunity.

Label	Field
Account Industry	AccountId.Industry
Account Name	AccountId.Name
Account Owner ID	AccountId.OwnerId.Id
Amount	Amount
Close Date	CloseDate
Opportunity Name	Name
Owner Name	AccountId.OwnerId.Name

Multi-Touch Attribution Dataset

The dataset ID of this optional multi-touch attribution dataset is `pdMultiAttrib`. Each row of this dataset represents an individual Salesforce campaign influence record and includes additional campaign, contact, opportunity, and account field values for context.

Label	Field
Account	OpportunityId.AccountId.Name
Account Id	OpportunityId.AccountId
Campaign	CampaignId.Name
Campaign Actual Cost	CampaignId.ActualCost
Campaign Budgeted Cost	CampaignId.BudgetedCost
Campaign End Date	CampaignId.EndDate
Campaign ID	CampaignId
Campaign Influence ID	Id
Campaign Influence Model	ModelId.MasterLabel
Campaign Influence Model ID	ModelId
Campaign Start Date	CampaignId.StartDate
Contact	ContactId.Name
Contact First Name	ContactId.FirstName
Contact ID	ContactId
Contact Last Name	ContactId.LastName
Lead Source	ContactId.LeadSource
Opportunity	OpportunityId.Name
Opportunity ID	OpportunityId
Revenue	CimtaGenerated.TotalRevenue
Revenue Share	RevenueShare
ROI	CimtaGenerated.Roi
Stage Name	OpportunityId.StageName
Total Value	CimtaGenerated.TotalValue