B2B Marketing Analytics Implementation Guide

Salesforce, Summer '25

Last updated: May 16, 2025

CONTENTS

Set Up B2B Marketing Analytics 1
Prerequisites for B2B Marketing Analytics 2
Set Up B2B Marketing Analytics 3
Permissions for B2B Marketing Analytics 3
Migration for Legacy Users 6
Considerations for B2B Marketing Analytics 8
Create and Upgrade B2B Marketing Analytics Apps 11
Create a B2B Marketing Analytics App 11
Reconfigure B2B Marketing Analytics 12
Upgrade a B2B Marketing Analytics Template 13
Optional Uses for B2B Marketing Analytics 13
Account-Based Marketing Dashboard 14
Multi-Touch Attribution Dashboard 17
Prospect and Activity Dataset 20
B2B Marketing Analytics Glossary 26
B2B Marketing Analytics Dashboards 28
B2B Marketing Analytics Datasets 34

SET UP B2B MARKETING ANALYTICS

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

Before you begin, you must have a verified Salesforce connector. See Setting Up a Salesforce Connector for Business Units Purchased After February 11, 2019 or Setting Up a Salesforce Connector for Business Units Purchased Before February 11, 2019.

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 CRM Analytics terminology.

Prerequisites for B2B Marketing Analytics

EDITIONS

Available in: Account Engagement **Plus**, **Advanced**, and **Premium** Editions with Salesforce **Enterprise** Edition or higher

Available for an extra cost in legacy Account Engagement **Pro** and **Ultimate** Editions with Salesforce **Enterprise** Edition or higher

USER PERMISSIONS

To enable CRM Analytics platform:
- Customize Application

To create permission sets:
- Manage Profiles AND Permission Sets

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: 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 Account Engagement 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 Analytics 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 CRM Analytics Templated Apps and Use CRM Analytics Templated Apps.

- 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 CRM Analytics 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 CRM Analytics 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 CRM Analytics 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 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 6. 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 13

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 that 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.

Note: Tableau CRM is now known as CRM Analytics. We wish we could snap our fingers to update the name everywhere, but you can expect to see the previous name in a few places until we replace it.

For new users to 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 Marketing 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 CRM Analytics: Click **Open CRM Analytics Setup**, and then enable CRM Analytics. If the Data Rows heading and Setup tiles appear, it's enabled.
   c. Enable Data Sync and Connections: Click **Open CRM Analytics 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.

Tip: By default, archived prospect data is included in CRM Analytics datasets. To exclude data from archived prospects in the pdProspects and odProspectActivity datasets, edit the preference in Account Engagement Settings.

Note: The Data Sync and Connections setting is recommended for most users because it improves performance in CRM Analytics. When Data Sync is on, you must schedule replication to get the latest data. If you have any CRM Analytics apps besides B2B Marketing Analytics, Data Sync can retain other apps' filters and show inaccurate data in B2B Marketing Analytics.

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USER PERMISSIONS

To assign permission sets:
- Assign Permission Sets

  AND

  View Setup and Configuration

To create B2B Marketing Analytics apps:
- Manage CRM Analytics 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 that you use determines which permission names are available.

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 Account Engagement 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

To select who can use B2B Marketing Analytics:
- Customize Application AND Modify All Data

If your org uses the Analytics Embedded App permission set license, review Migration for Legacy Users.

Note: Each B2B Marketing Analytics subscription provides five users.

Connector User

The connector user is used in orgs with the v1 Salesforce connector. The connector user must retain access to these 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

- Account Engagement 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 CRM Analytics Data
- Edit CRM Analytics Dataflows
- Manage CRM Analytics Templated Apps
- Use CRM Analytics Templated Apps

Integration User

The integration user is found in orgs with the v2 Salesforce connector. The integration user must retain access to these 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

- Account Engagement Integration 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 CRM Analytics Data
- Edit CRM Analytics Dataflows
- Manage CRM Analytics Templated Apps
- Use CRM Analytics Templated Apps

Manage Analytics User

Permission Set Licenses

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

Permission Sets

- Account Engagement User OR 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 CRM Analytics Data
- Edit CRM Analytics Dataflows
- Manage CRM Analytics Templated Apps
- Use CRM Analytics 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
- Account Engagement OR CRM User OR Sales User OR Service User

Permission Sets

- Account Engagement User OR 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 CRM Analytics Templated Apps

Create Permission Sets

Create permission sets that contain the permissions necessary for your users to complete a specific job or task.

Create Permission Sets

Create permission sets that contain the permissions necessary for your users to complete a specific job or task.

You can clone a permission set or create 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, in the Quick Find box, enter `Permission Sets`, and then select **Permission Sets**.
2. Click **New**.
3. Enter your permission set information.
4. Select the types of users for the permission set. Select a specific user or permission set license. Or, if users with different licenses are assigned the permission set, select **None**. If the permission set is associated with a specific license, it can only include the permission and settings entitled by that license.

   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.
5. Add the required permissions and settings to the permission set. For more information, see Configure Permissions and Access in Permission Sets in Salesforce Help.

EDITIONS

Available in: both 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

Example: You have several Sales Users who are currently allowed to read, create, and edit leads. But you need some users to also delete and transfer leads. You create a permission set for this specific task. Under Object Settings, select Leads and enable delete. Under App Permissions, find and enable the Transfer Leads permission. Assign the permission set to users who need these permissions.

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.

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

- Before You Upgrade
- After You Upgrade

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Set Up for Legacy Add-On Users

I purchased B2B Marketing Analytics as an add-on, 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 CRM Analytics Templated Apps permission set, and assign it to the connector user.
3. Create the Use CRM Analytics 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 the Analytics Embedded App License
The app version that you use determines which permissions are available. After you determine which Salesforce permission set license you have, assign the other permission sets and system permissions to different types of users.

Permissions for the Analytics Embedded App License

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

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 Account Engagement 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 you have the Analytics Embedded Apps permission set license, refer to the following list of permissions.

Note: System labels have been updated to reflect branding changes. Some older labels continue to include Pardot, Analytics, or Tableau CRM.

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Connector User, Integration User, and Manage Analytics Users

Permission Set Licenses

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

Permission Sets

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

System Permissions

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

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

- Use CRM Analytics
- Use CRM Analytics Templated Apps

Use Analytics Salesforce User

Permission Set Licenses

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

Permission Sets

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

Considerations for B2B Marketing Analytics

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

Note: Pardot is now known as Marketing Cloud Account Engagement. We wish we could snap our fingers to update the name everywhere, but you can expect to see the previous name in a few places until we replace it, including in the app itself.

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Setting Up B2B Marketing Analytics

- 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.
- 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 CRM Analytics Platform license can share access with additional sales and marketing users.

Updating the App Template

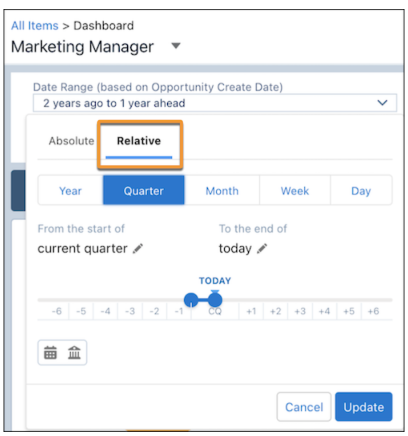
- B2B Marketing Analytics is built on a CRM Analytics app template, which is updated a few times per year. An admin can enable the feature, but users must install and upgrade their apps as needed.

- 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 Account Engagement 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 Multiple Business Units

You can use B2B Marketing Analytics apps with multiple business units, but individual dashboards behave differently.

- Create an app for each business unit that you want to work with by entering the Account Engagement business unit ID when you set up the app. Available data is then limited to that business unit in the Engagement, Pipeline, Marketing Manager, and Einstein Behavior Scoring dashboards.
- Multi-Touch Attribution (MTA) and Account-Based Marketing (ABM) dashboards show all available Account Engagement data, regardless of the app's associated business unit.
- To filter MTA or ABM dashboards, build a lens from available fields in the datasets.
- Marketing Data Sharing and row-level settings don't affect the data shown in B2B Marketing Analytics dashboards.
- For best results when filtering a dashboard by date, we recommend that you use the Relative date mode.



The Data Sync and Connections setting is recommended for most users because it improves performance in CRM Analytics. When Data Sync is on, you must schedule replication to get the latest data. If you have any CRM Analytics 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 that you created 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 Account Engagement business unit. Regardless of locale settings, currency formats in CRM Analytics 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, Analytics Studio contains a read-only 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 CRM Analytics 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 Account Engagement API request limits.
- External datasets originate in Account Engagement 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.
- If you use B2B Marketing Analytics without embedded Engagement History dashboards enabled, you can sync up to 25 million rows of data.
- For Account Engagement Growth Edition, Engagement History can sync up to 90 days or 50 million rows of data, whichever comes first. For Account Engagement Plus, Advanced, and Premium Editions where B2B Marketing Analytics and the Prospect and Activity dataset are enabled, these features can sync up to 3 years or 35 million rows in total.
- Due to date filters, time zones, and other factors, you can encounter discrepancies between data in Account Engagement 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 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

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Create a B2B Marketing Analytics App

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

USER PERMISSIONS

To create a B2B Marketing Analytics app:

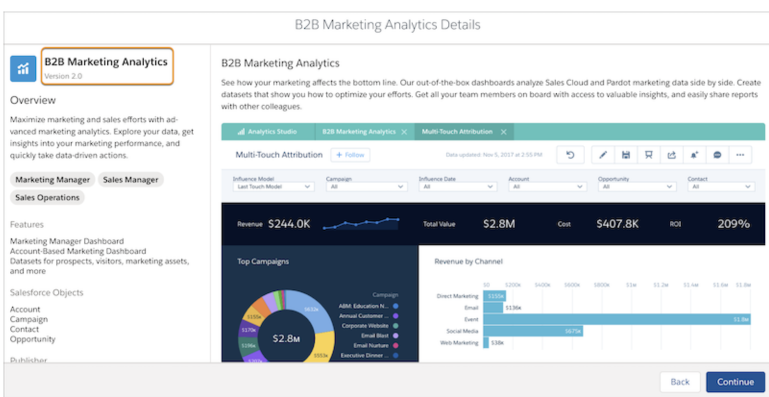
- Manage CRM Analytics Templated Apps AND Create B2B Marketing Analytics Apps OR B2B Marketing Analytics permission set

To use B2B Marketing Analytics

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

1. In Salesforce, from the App Launcher ( ), find and open **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.

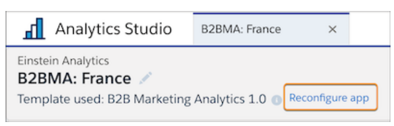
The setup process continues in the background. To see the status of your app, navigate to **Settings** > **Data Manager** > **Dataflow View** in Analytics Studio.

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: This process overwrites custom dashboards. Before you reconfigure, back up your app and save any dataset IDs.

1. Open your B2B Marketing Analytics app in 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.

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USER PERMISSIONS

To reconfigure B2B Marketing Analytics:

- Manage CRM Analytics 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.

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.

1. Open your B2B Marketing Analytics app in Analytics Studio.
2. Click **Upgrade to new version**.
3. Review the release notes provided, and continue through the setup questions.
4. Choose to overwrite your app or create one.

In Analytics Studio, check the update status at **Settings** > **Data Manager** > **Dataflow View**.

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USER PERMISSIONS

To upgrade B2B Marketing Analytics:

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

To use B2B Marketing Analytics:

- Use CRM Analytics 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.

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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, users can find asset engagement from Account Engagement and data from Sales Cloud 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 identify the individual prospect record that acted on a certain asset.

Account-Based Marketing Dashboard

EDITIONS

Available in: Account Engagement **Plus**, **Advanced**, and **Premium** Editions with Salesforce **Enterprise** Edition or higher

Available for additional cost in legacy Account Engagement **Pro** or **Ultimate** Editions with Salesforce **Enterprise** Edition or higher

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.

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, some accounts don't appear.

Metric Label	Description	Formula	Origin
Pipeline Value	Sum of monetary value associated with open opportunities	Sum of Amount values on open opportunities	ABM Opportunity dataset
Open Opportunities	Number of open opportunities associated with the selected accounts	Count of open opportunities with an Amount value of more than $0	ABM Opportunity dataset
Contacts	Number of contacts associated with selected accounts	Count of contact records	ABM Contact dataset
Avg. Engagement Score	Average Score among all contacts	(Sum of Score values) / (Count of contacts)	ABM Contact dataset
Sales Events	Number of sales activities for the selected accounts	Count of sales activities	ABM Event dataset

Other charts—There are a few other tables and charts that appear on the Account-Based Marketing dashboard.

- 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

Label	Field
Account Owner ID	AccountId.OwnerId.Id
Amount	Amount
Close Date	CloseDate
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
Use the object manager to set field-level security settings on 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.

Note: Pardot is now known as Marketing Cloud Account Engagement. We wish we could snap our fingers to update the name everywhere, but you can expect to see the previous name in a few places until we replace it, including in the app itself.

Pardot Grade and Pardot Score aren't standard fields. Install the Account Engagement 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

EDITIONS

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

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

USER PERMISSIONS

To set field-level security:
- Manage Profiles and Permission Sets

  AND

  Customize Application

Use the object manager to set field-level security settings on profiles.

We strongly recommend that you use permission sets and permission set groups instead of profiles to manage your users' field permissions. Because you can reuse smaller permission set building blocks, you can avoid creating dozens or even hundreds of profiles for each user and job function. For more information, see Permissions Sets in Salesforce Help.

Note: On the User Management Settings page in Setup, if the Field-Level Security for Permission Sets during Field Creation setting is enabled, you set field-level security for permission sets in Object Manager.

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.

Multi-Touch Attribution Dashboard

EDITIONS

Available in: Account Engagement **Plus**, **Advanced**, and **Premium** Editions with Salesforce **Enterprise** Edition or higher

Available for an extra cost in legacy Account Engagement **Pro** and **Ultimate** Editions with Salesforce **Enterprise** Edition or higher

Multi-Touch Attribution dashboards show you which marketing efforts are most influential during each stage of the purchase lifecycle. After you enable Connected Campaigns, users can find asset engagement from Account Engagement and data from Sales Cloud together in one dashboard.

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

Dashboard Reference

Metric Label	Description	Formula	Origin
Revenue	Total revenue for won opportunities	Sum of Revenue values on Closed/Won opportunities	Multi-Touch Attribution dataset
Sum of Revenue Share (line graph)	Total revenue, with monthly datapoints	Sum of Revenue values on Closed/Won opportunities, grouped by the ending month	Multi-Touch Attribution dataset
Total Value	Total potential value for all opportunities	Sum of Revenue values for all opportunities	Multi-Touch Attribution dataset
Actual Cost	Total actual cost associated with selected campaigns	Sum of Actual Cost values	Multi-Touch Attribution dataset

Metric Label	Description	Formula	Origin
ROI	Percentage of actual campaign costs compared to net revenue	([Sum of revenue values for all campaigns - Sum of actual cost values for all campaigns] / Sum of actual cost values)	Multi-Touch Attribution dataset
Top Salesforce Campaigns	Total revenue, grouped by individual Salesforce campaign	—	Multi-Touch Attribution dataset
Revenue Share by Campaign Type	Total revenue, 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
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

Label	Field
ROI	CimtaGenerated.Roi
Stage Name	OpportunityId.StageName
Total Value	CimtaGenerated.TotalValue

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

Enable Connected Campaigns

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

Note: Pardot is now known as Marketing Cloud Account Engagement. We wish we could snap our fingers to update the name everywhere, but you can expect to see the previous name in a few places until we replace it, including in the app itself.

Before you enable the feature or begin connecting campaigns, we recommend that you outline how your campaigns relate to each other. Consider the following tasks. For best results, make sure that every campaign you want to use has a counterpart.

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

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

Note:
- The B2BMA Integration user doesn't need the Account Engagement Marketing User role to enable and work with Connected Campaigns.
- Make sure that you create counterpart campaigns in Salesforce for Account Engagement default and required campaigns, including Website Tracking and Salesforce Sync. If you aren't using the Email Plug-in campaign, delete it before you connect.
- A Account Engagement campaign is updated or created each time the Salesforce campaign is edited by a person or process. To limit the number of campaigns created in Account Engagement, identify a cut-off date for replication.

EDITIONS

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

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

USER PERMISSIONS

To connect campaigns:
- Account Engagement Administrator role

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

3. Select the Salesforce campaign record types that can be connected.
4. Save your work.

The previous steps prepare your org for the alignment stage of setup. Unconnected campaigns continue to show in both places. Now, your marketing team can connect campaigns individually or in bulk.

After they're done, complete the setup process by giving Salesforce access to manage the campaigns.

- On the same connector settings page, select **Use Salesforce to manage all campaigns**.
- To reduce the number of campaigns that are replicated over time, enter a date under Limit Campaign Creation by Date.
- To let Account Engagement users continue to see the remaining unconnected campaigns, select **Show Unconnected Campaigns**.

Users now manage campaigns only in Salesforce.

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 identify 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 it during the app setup in Analytics Studio. In Marketing Setup, enter `B2B Marketing` 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: Account Engagement **Plus**, **Advanced**, and **Premium** Editions with Salesforce **Enterprise** Edition or higher

Available for an extra cost in legacy Account Engagement **Pro** and **Ultimate** Editions with Salesforce **Enterprise** Edition or higher

Account

API Name: AccountName

Name of the account associated with prospect activity

Account ID

API Name: AccountId

Salesforce identifier for the prospect's associated account

Account Name

API Name: Prospect.account_name

Name of the prospect's associated account

Activity

API Name: ActivityType

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

Activity Campaign ID

API Name: ActivityCampaignId

Salesforce identifier for the associated campaign

Activity Campaign Name

API Name: ActivityCampaignName

Campaign associated with the activity

Activity Date

API Name: ActivityDate

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

Address One

API Name: Prospect.address_one

Address One field associated with the prospect

Address Two

API Name: Prospect.address_two

Address Two field associated with the prospect

Annual Revenue

API Name: Prospect.annual_revenue

The prospect's associated company's annual revenue

Archived

API Name: Prospect.is_archived

True or false whether the prospect has been archived

Asset Activity

API Name: AssetActivity

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

API Name: AssetId

Salesforce identifier for the asset a prospect engaged with

Asset Name

API Name: AssetName

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

API Name: AssetType

The type of asset a prospect engaged with

Assigned User First Name

API Name: Prospect.assigned_user_first_name

First name of the prospect's assigned user

Assigned User Full Name

API Name: Prospect.assigned_user_full_name

Full name of the prospect's assigned user

Assigned User Last Name

API Name: Prospect.assigned_user_last_name

Last name of the prospect's assigned user

CRM Contact FID

API Name: Prospect.crm_contact_fid

Salesforce identifier for the contact record associated with the prospect

CRM Lead FID

API Name: Prospect.crm_lead_fid

Salesforce identifier for the lead record associated with the prospect

CRM Owner FID

API Name: Prospect.crm_owner_fid

Salesforce identifier for the prospect owner

City

API Name: Prospect.city

The prospect's city

Comments

API Name: Prospect.comments

The text of user comments associated with the prospect

Company

API Name: Prospect.company

The prospect's company

Country

API Name: Prospect.country

The prospect's country

Created by First Name

API Name: Prospect.created_by_first_name

First name of the user who created the prospect

Created by Full Name

API Name: Prospect.created_by_full_name

Full name of the user who created the prospect

Created by Last Name

API Name: Prospect.created_by_last_name

Last name of the user who created the prospect

Department

API Name: Prospect.department

The prospect's department

Email

API Name: Prospect.email

The prospect's email address

Employees

API Name: Prospect.employees

Number of employees working at the prospect's company

External ID

API Name: ActorExternalId

Unique identifier for the prospect

Fax

API Name: Prospect.fax

The prospect’s fax number

First Name

API Name: Prospect.first_name

The prospect’s first name

Full Name

API Name: Prospect.full_name

The prospect’s full name

Grade

API Name: Prospect.grade

The prospect’s grade

ID

API Name: ActorId

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

Industry

API Name: Prospect.industry

The prospect’s industry

Is Do Not Call

API Name: Prospect.is_do_not_call

True or false whether the prospect can receive phone calls

Is Do Not Email

API Name: Prospect.is_do_not_email

True or false whether the prospect can receive emails

Job Title

API Name: Prospect.job_title

The prospect’s job title

Last Name

API Name: Prospect.last_name

The prospect’s last name

Name

API Name: ActorName

The prospect’s full name

Opted Out

API Name: Prospect.opted_out

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

Pardot Account ID (external)

API Name: Prospect.pardot_account_id

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

Pardot Activity ID

API Name: ActivityExternalId

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

Pardot Asset ID

API Name: AssetExternalId

Unique identifier for the asset that a prospect engaged with

Phone

API Name: Prospect.phone

The prospect's phone number

Prospect Archived

API Name: ProspectIsArchived

True or false. Whether the prospect has been archived

Prospect Assigned Date

API Name: Prospect.assigned_date

Date a prospect was assigned to a user (UTC)

Prospect CRM Last Activity Date

API Name: Prospect.crm_last_activity_date

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

Prospect Created At Date

API Name: Prospect.created_at_date

Date the prospect was created

Prospect ID (external)

API Name: Prospect.id

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

Prospect Job Title

API Name: ProspectJobTitle

The prospect's job title

Prospect Last Activity Date

API Name: Prospect.last_activity_date

Date of the prospect's last activity recorded

Prospect Pardot Campaign Id

API Name: ProspectCampaignExternalId

Unique identifier for the first-touch Account Engagement campaign that a prospect is associated with

Prospect Type

API Name: ActorType

Type of record: Prospect, Lead, or Contact

Prospect Updated At Date

API Name: Prospect.updated_at_date

Date a prospect was last updated

Salutation
API Name: Prospect.salutation

The prospect's preferred title

Score
API Name: Prospect.score

The prospect's score

Source
API Name: Prospect.source

How the prospect was added

Source Campaign
API Name: Prospect.source_campaign

The name of the associated Account Engagement campaign

State
API Name: Prospect.state

The prospect's state

Tags
API Name: Prospect.tags

Tags associated with the prospect

Territory
API Name: Prospect.territory

The prospect's territory

Updated by First Name
API Name: Prospect.updated_by_first_name

First name of the user who last updated the prospect

Updated by Last Name
API Name: Prospect.updated_by_last_name

Last name of the user who last updated the prospect

Website
API Name: Prospect.website

Website URL associated with the prospect's company

Years In Business
API Name: Prospect.years_in_business

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

Zip
API Name: Prospect.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 CRM Analytics terminology.

Note: Pardot is now known as Marketing Cloud Account Engagement. We wish we could snap our fingers to update the name everywhere, but you can expect to see the previous name in a few places until we replace it, including in the app itself.

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 CRM Analytics, 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
B2B Marketing Analytics includes three prebuilt dashboards to meet the needs of everyone on the team. 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 features widgets that outline or visualize helpful metrics. Data for these dashboards originates in Account Engagement, Salesforce, or both sources. Each dashboard is built on predetermined datasets and filters, or lenses, that help you draw insights from your marketing data.

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

B2B Marketing Analytics includes three prebuilt dashboards to meet the needs of everyone on the team. 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 features widgets that outline or visualize helpful metrics. Data for these dashboards originates in Account Engagement, Salesforce, or both sources. Each dashboard is built on predetermined datasets and filters, or lenses, that help you draw insights from your marketing data.

EDITIONS

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Available for an extra cost in legacy Account Engagement **Pro** and **Ultimate** Editions with Salesforce **Enterprise** Edition or higher

Dashboards Overview

- 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.
- 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 shows 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. The Multi-Touch Attribution dashboard shows 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.
- 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, score, won/lost percentage, stage value, and a table of opportunities.
- Einstein Behavior Scoring—The Einstein Behavior Scoring dashboard gives 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.

Dashboard Terms

Certain terms used in these descriptions can refer to fields in either Account Engagement or Salesforce.

- Monetary value is derived from the Value field on a Account Engagement opportunity. The Value field maps to the Amount field on a Salesforce opportunity.
- Cost is derived from the Cost field on a campaign in Account Engagement. When campaigns are connected, the Cost field on a Account Engagement campaign maps to the Budgeted Cost field in Salesforce.
- 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.

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 42, pdOpportunity, which combines data from both sources.

Metric Label	Description	Formula	Origin
Opportunities in Pipeline	Number of opportunities not in Won or Lost stage	—	pdOpportunity dataset
Donut Chart (no label)	Total number of opportunities (center) and the number of opportunities in SQL, Won, and Lost stages (ring)	—	pdOpportunity dataset
Pipeline	Total value of open opportunities	Sum of monetary value associated with open opportunities	pdOpportunity dataset
Revenue	Total value of opportunities in the Closed/Won stage	Sum of monetary value associated with opportunities in the Won stage	pdOpportunity dataset
Avg. Conversion to Close	Average close velocity in days, based on Closed/Won opportunities	(Sum of [Opportunity Close Date - Opportunity Creation Date]) / Total Closed/Won opportunities	pdOpportunity dataset
Revenue by Campaign	Total revenue associated with individual campaigns	Sum of Value fields, based on campaigns that are associated with an opportunity	pdOpportunity dataset

Email Engagement Widget—The metrics in this widget use data from the Email dataset on page 34, pdEmail, which contains data from both sources.

Metric Label	Description	Formula	Origin
Total Sent	Total emails sent	Count of sent emails	pdEmail dataset
Hard Bounces	Total hard bounces	Count of hard bounces	pdEmail dataset
Unique CTR	Percentage of prospects who clicked email links	Unique clicks / Total delivered Delivered is (Sent emails - hard bounces)	pdEmail dataset
Unique Open Rate	Percentage of unique HTML opens compared to the total delivered emails	Unique HTML opens / Total delivered Delivered is (Sent emails - hard bounces)	pdEmail dataset
Opt-Outs	Total number of prospects that have clicked the link to unsubscribe or that opted out	—	pdEmail dataset

Metric Label	Description	Formula	Origin
	of all email communications in the Email Preference Center		
SPAM Complaints	Total number of prospects that reported the email as spam	—	pdEmail dataset

Other Charts—There are three data charts that appear on the Marketing Manager dashboard.

- 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 Account Engagement.
- 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 Account Engagement.

Pipeline

The metrics throughout the Pipeline dashboard originate from the Opportunity, Prospects, and Visitors datasets.

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.

After the Pipeline Breakdown section, are three graphs: Source Campaigns, Pipeline by Company, and Lead Sources. The first two graphs show the monetary value that is associated with opportunities' individual campaigns, companies, and marketing channels. The Lead Sources graph indicates the count of lead sources.

Pipeline Breakdown Widget—The metrics in the Pipeline Breakdown Widget use data from the pdOpportunity dataset, pdVisitor dataset, and pdProspect dataset.

Metric Label	Description	Formula	Origin
Total Value	Total value of opportunities in the pipeline	Sum of monetary value associated with opportunities **not** in Closed/Won or Closed/Lost stage	pdOpportunity dataset
Opportunities in Pipeline	Number of opportunities in the pipeline	Count of all opportunities **not** in Won or Lost stage	pdOpportunity dataset
Cost	Total cost of selected campaigns	Sum of budgeted cost fields for selected campaigns	pdOpportunity dataset
Revenue	Total value of won opportunities	Sum of monetary value associated with opportunities in the Closed/Won stage	pdOpportunity dataset
Visitor Conversion Rate	Percentage of prospects compared to total visitors	(Prospects / visitors) * 100	pdVisitor, pdProspect datasets
Opportunity Win Rate	Percentage of won opportunities	(Closed/Won opportunities / Closed opportunities) * 100	pdOpportunity dataset

Metric Label	Description	Formula	Origin
ROI	Percentage of campaign cost compared to net revenue	(Total revenue / Sum of actual cost fields for campaigns) * 100	pdOpportunity dataset

Engagement

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

Metric descriptions are the same for the List Email Engagement Widget and the Email Template Widget. The origin for List Email widget data is the Email dataset on page 34, pdEmail. Email Template widget data originates in the Email Template dataset on page 37, pdEmailTemplate.

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

The metrics in the Forms Engagement Widget originate in the Forms and Form Handlers dataset on page 39, pdFormAndHandler, which contains data from both sources.

Metric Label	Description	Formula
Total Submission Rate	Percentage of how often forms are completed	Form submissions / Total form views

Metric Label	Description	Formula
Form Conversion Rate	Percentage of visitors who convert via forms	Visitor-to-prospect conversions / Total form submissions
Total Views	Number of form views	—
Total Submissions	Number of forms completed	—
Form Submissions	Number of form submissions	—
Handler Submissions	Number of forms submitted via form handler	—\

The metrics in the Landing Page Engagement Widget originate in the Landing Page dataset on page 40, pdLandingPage, which contains data from both sources.

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

Multi-Touch Attribution

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

Metric Label	Description	Formula	Origin
Revenue	Total revenue for won opportunities	Sum of Revenue values on Closed/Won opportunities	Multi-Touch Attribution dataset
Sum of Revenue Share (line graph)	Total revenue, with monthly datapoints	Sum of Revenue values on Closed/Won opportunities, grouped by the ending month	Multi-Touch Attribution dataset
Total Value	Total potential value for all opportunities	Sum of Revenue values for all opportunities	Multi-Touch Attribution dataset
Actual Cost	Total actual cost associated with selected campaigns	Sum of Actual Cost values	Multi-Touch Attribution dataset
ROI	Percentage of actual campaign costs compared to net revenue	([Sum of revenue values for all campaigns - Sum of actual cost values for all campaigns] / Sum of actual cost values)	Multi-Touch Attribution dataset

Metric Label	Description	Formula	Origin
Top Salesforce Campaigns	Total revenue, grouped by individual Salesforce campaign	—	Multi-Touch Attribution dataset
Revenue Share by Campaign Type	Total revenue, grouped by Salesforce campaign type	—	Multi-Touch Attribution dataset

Account-Based Marketing

The Account-Based Marketing dashboard includes an Account Details Widget 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.

Metric Label	Description	Formula	Origin
Pipeline Value	Sum of monetary value associated with open opportunities	Sum of Amount values on open opportunities	ABM Opportunity dataset
Open Opportunities	Number of open opportunities associated with the selected accounts	Count of open opportunities with an Amount value of more than $0	ABM Opportunity dataset
Contacts	Number of contacts associated with selected accounts	Count of contact records	ABM Contact dataset
Avg. Engagement Score	Average Score among all contacts	(Sum of Score values) / (Count of contacts)	ABM Contact dataset
Sales Events	Number of sales activities for the selected accounts	Count of sales activities	ABM Event dataset

Other charts—There are a few other tables and charts that appear on the Account-Based Marketing dashboard.

- 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 CRM Analytics Studio, use the value in the field text column.

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

Note: Pardot is now known as Marketing Cloud Account Engagement. We wish we could snap our fingers to update the name everywhere, but you can expect to see the previous name in a few places until we replace it, including in the app itself.

EDITIONS

Available in: Account Engagement **Plus**, **Advanced**, and **Premium** Editions with Salesforce **Enterprise** Edition or higher

Available for an extra cost in legacy Account Engagement **Pro** and **Ultimate** Editions with Salesforce **Enterprise** Edition or higher

Pardot Campaign Dataset

The dataset ID is `pdCampaign`. Each row represents an individual Account Engagement campaign. A connected campaign includes a Campaign ID (CRM) value. This dataset doesn't include data from archived campaigns.

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

Pardot Email Dataset

The dataset ID is `pdEmail`. Each row represents 1 day of statistics for an individual list email. List emails related to a connected campaign include values labeled (CRM), which correspond to the counterpart Salesforce campaign. This dataset includes data from active and archived emails. (In demo orgs, archived emails aren't included.)

Label	Field	Description	Origin
Bounce Rate	bounce_rate	Percentage of total bounces compared to emails sent	Account Engagement
Campaign	campaign_name	Associated campaign name	Account Engagement

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

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

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

Pardot Email Template Dataset

The dataset ID is `pdEmailTemplate`. Each row represents 1 day of statistics for an individual email template. Email templates associated with a connected campaign include a value that includes (CRM), which corresponds to the counterpart Salesforce campaign. This dataset includes data from active and archived email templates. Email metrics are based on the emails built on selected email templates.

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

Label	Field	Description	Origin
Sender	sender	A name in the Sender field of the email template. This field displays the specified user or general username that appears at the end of the sending hierarchy, if the name is available.	Account Engagement
Spam Complaint Rate	spam_complaint_rate	Percentage of spam complaints compared to emails delivered, totaled by day	Account Engagement
Stats Date	stats_date	Date the email template statistics are pulled	Account Engagement
Stats ID	stats_id	Stats ID of the email template	Account Engagement
Subject	subject	Subject line of the email template	Account Engagement
Tag	tags	Tags associated with the email template	Account Engagement
Total Bounces	total_bounces	Sum of soft-bounced and hard-bounced emails, totaled by day	Account Engagement
Total Clicks	total_clicks	Number of link clicks, totaled by day	Account Engagement
Total CTR	total_ctr	Percentage of link clicks compared to emails delivered, totaled by day	Account Engagement
Total Delivered	total_delivered	Number of emails delivered, totaled by day	Account Engagement
Total Hard Bounced	total_hard_bounced	Number of emails that hard bounced, totaled by day	Account Engagement
Total HTML Opens	total_html_opens	Number of HTML opens, totaled by day	Account Engagement
Total Opt Outs	opt_outs	Number of opt outs, totaled by day	Account Engagement
Total Queued	queued	Number of emails queued, totaled by day	Account Engagement
Total Sent	sent	Number of emails sent, totaled by day	Account Engagement
Total Soft Bounced	total_soft_bounced	Number of emails that soft bounced, totaled by day	Account Engagement

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

Pardot Form and Form Handler Dataset

The dataset ID is `pdFormAndHandler`. Each row represents 1 day of statistics for an individual form or form handler. Assets associated with a connected campaign contain a value that includes "(CRM)," which corresponds to the counterpart Salesforce campaign. This dataset includes data from active and archived forms and form handlers.

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

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

Pardot Landing Page Dataset

The dataset ID is `pdLandingPage`. Each row represents 1 day of statistics for an individual landing page. Assets related to a connected campaign contain a value that includes "(CRM)," which corresponds to the counterpart Salesforce campaign. This dataset includes data from active and archived landing pages.

Label	Field	Description	Origin
Campaign	campaign_name	Associated campaign name	Account Engagement
Campaign ID (CRM)	campaign_crm_id	Associated Account Engagement campaign ID	Account Engagement
Campaign ID (external)	campaign_id	Associated Salesforce campaign ID	Salesforce
Conversions	conversion	Associated Salesforce campaign ID	Salesforce
Created	created_at	Date the landing page is created	Account Engagement

Label	Field	Description	Origin
Created By	created_by	First and last name of Account Engagement user who created the email	Account Engagement
Created By - User ID (CRM)	created_by_crm_id	Salesforce user ID of associated Account Engagement user who created the email	Salesforce
Form	form_name	Name of the included form, if applicable	Account Engagement
Landing Page ID	landing_page_id	Unique identifier for the landing page	Account Engagement
Name	landing_page_name	Name of the landing page	Account Engagement
Short URL	short_url	Short URL of the landing page	Account Engagement
Stats Date	stats_date	Date the landing page statistics are pulled	Account Engagement
Submission Rate	submissionRate	Percentage of submissions compared to landing page views, totaled by day. (Hidden)	Account Engagement
Tags	tags	Tags associated with the landing page	Account Engagement
Total Clicks	total_clicks	Number of link clicks, totaled by day	Account Engagement
Total Errors	total_errors	Number of form errors, totaled by day	Account Engagement
Total Submissions	total_submissions	Number of form and landing page submissions, totaled by day	Account Engagement
Total Views	total_views	Number of landing page views, totaled by day	Account Engagement
Unique Clicks	unique_clicks	Number of unique link clicks, totaled by day	Account Engagement
Unique Errors	unique_errors	Number of unique form errors, totaled by day	Account Engagement
Unique Submissions	unique_submissions	Number of unique submissions, totaled by day	Account Engagement
Unique Views	unique_views	Number of unique landing page views, totaled by day	Account Engagement

Label	Field	Description	Origin
Updated	updated_at	Date the landing page is last updated	Account Engagement
Updated By	updated_by	First and last name of Account Engagement user who edited the landing page most recently	Account Engagement
Updated By - User ID (CRM)	created_by_crm_id	Salesforce user ID of associated Account Engagement user who edited the landing page most recently	Salesforce
URL	url	Full URL of the landing page	Salesforce

Pardot Opportunity Dataset

The dataset ID is `pdOpportunity`. Each row represents an individual Account Engagement opportunity. Opportunities related to a connected campaign contain a value that includes "(CRM)," which corresponds to the counterpart Salesforce campaign. This dataset includes data from active and archived opportunities.

Label	Field	Description	Origin
Account ID (CRM)	account_crm_id	Account ID that the prospect or lead is related to	Salesforce
Pardot Campaign	campaign_name	Name of a Account Engagement campaign that the prospect is assigned to	Account Engagement
Campaign Date	campaign_date	Date and time the campaign is created	Account Engagement
Campaign Cost	campaign_cost	Campaign cost amount associated with the opportunity (currency is based on the locale setting)	Account Engagement
CRM Campaign ID	campaign_crm_id	Salesforce ID of the opportunity's associated Account Engagement campaign	Salesforce
Pardot Campaign ID	campaign_id	ID for the opportunity's associated Account Engagement campaign	Account Engagement
Close Date	close_date	Date and time that the opportunity is closed	Account Engagement
Monetary Value	monetary_value	Dollar amount of the opportunity's value (currency is based on the locale setting)	Account Engagement

Label	Field	Description	Origin
Opportunity Created Date	opportunity_date	Date and time the opportunity is created in Salesforce	Account Engagement
CRM Opportunity ID	opportunity_crm_id	Salesforce ID of the opportunity	Salesforce
Pardot Opportunity ID	opportunity_id	ID of the Account Engagement opportunity	Account Engagement
Opportunity Status	opportunity_status	Status of the opportunity: Open, Won, or Lost	Salesforce
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	Tags associated with the opportunity	Account Engagement

Pardot Prospect Dataset

The dataset ID is `pdProspect`. Each row represents a unique prospect. Prospects related to a lead or contact in Salesforce include values labeled (CRM). By default, this dataset includes data from active and archived prospects. An admin can edit this option in Account Engagement Settings.

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

Label	Field	Description	Origin
Assigned User Full Name	assigned_user_full_name	First and last name of the prospect’s assigned user	Account Engagement
Assigned User Last Name	assigned_user_last_name	Last name of the prospect’s assigned user	Account Engagement
City	city	Prospect’s city	Account Engagement
Comments	comments	User comments about the prospect	Account Engagement
Company	company	Prospect’s company name	Account Engagement
Country	country	Prospect’s country	Account Engagement
Created At Date	created_at_date	Date and time that prospect is created	Account Engagement
Created by First Name	created_by_first_name	First name of the user who created the prospect	Account Engagement
Created by Full Name	created_by_full_name	First and last name of the user who created the prospect	Account Engagement
Created By Last Name	created_by_last_name	Last name of the user who created the prospect	Account Engagement
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	Account Engagement
Email	email	Prospect’s email address	Account Engagement
Employees	employees	Number of employees who work at the company	Account Engagement
Fax	fax	Prospect’s fax number	Account Engagement
First Name	first_name	Prospect’s first name	Account Engagement
First Visit Date	first_visitor_date	Date and time of first visitor activity. Identified by IP address and associated with prospect by email address.	Account Engagement
Full Name	full_name	Prospect’s first and last name	Account Engagement
Pardot Grade	grade	Prospect’s grade in Account Engagement	Account Engagement
Industry	industry	Type of industry for prospect’s company	Account Engagement

Label	Field	Description	Origin
Is Do Not Call	is_do_not_call	Indicates whether prospect has fully opted out of phone calls: true or false	Account Engagement
Is Do Not Email	is_do_not_email	Indicates whether the prospect has opted out of all email types: true or false	Account Engagement
Job Title	job_title	Prospect's job title	Account Engagement
Last Activity Date	last_activity_date	Date and time that prospect last interacted with a marketing asset	Account Engagement
Last Name	last_name	Prospect's last name	Account Engagement
Most Recent Visitor Date	most_recent_visitor_date	Date and time of most recent visitor activity. Identified by different IP address and associated with prospect by the same email address.	Account Engagement
MQL Date	mql_date	Date and time that the prospect is assigned to the MQL stage	Account Engagement
Opted Out	opted_out	Indicates whether the prospect has opted out of marketing emails: true or false	Account Engagement
Pardot Account ID	pardot_account_id	Business unit ID associated with the B2B Marketing Analytics app	Account Engagement
Pardot Visitor ID	visitor_id	Prospect's visitor ID	Account Engagement
Phone	phone	Prospect's phone number	Account Engagement
Pardot Prospect ID	id	Prospect's ID	Account Engagement
Salutation	salutation	Prospect's preferred title, as a picklist	Account Engagement
Pardot Score	score	Prospect's score in Account Engagement	Account Engagement
Source Campaign	source_campaign	Vendor name and source type that indicates prospect's original source.	Account Engagement
Source	source	Campaign associated with prospect's first touch	Account Engagement
Stage	stage	Prospect's stage in marketing lifecycle	Account Engagement
State	state	Prospect's state	Account Engagement
Tags	tags	Tags associated with the prospect	Account Engagement
Territory	territory	Prospect's territory	Account Engagement
Updated At Date	updated_at_date	Date and time that the prospect was updated	Account Engagement
Updated By First Name	updated_by_first_name	First name of the user who last updated the prospect	Account Engagement
Updated By Last Name	updated_by_last_name	Last name of the user who last updated the prospect	Account Engagement
Website	website	URL of the prospect's company website	Account Engagement

Label	Field	Description	Origin
Years In Business	years_in_business	Length of time the prospect's company has been in business	Account Engagement
Zip	zip	Prospect's ZIP code	Account Engagement

Prospect and Activity Dataset

The dataset ID is `pdProspectActivity`. Each row represents a unique engagement activity and data related to the prospect who performed it.

The fields and labels vary slightly depending on whether you have Object Sync turned on.

- Prospect and Activity Dataset on page 20
- Prospect and Activity Dataset for Object Sync

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

Pardot Tags Dataset

Each row of this dataset represents a unique, assigned tag. This dataset includes active tags for campaigns, emails, forms, form handlers, landing pages, opportunities, and prospects.

Label	Field	Origin
Name	tag_name	Account Engagement
Tag ID	tag_id	Account Engagement

Pardot Users Dataset

The dataset ID is `pdUser`. It's used in app templates only for Account Engagement. Each row represents one user.

Label	Field	Origin
Created At Date	created_at	Account Engagement
Email	email	Account Engagement
First Name	first_name	Account Engagement
Full Name	full_name	Account Engagement
Is Archived	is_archived	Account Engagement
Job Title	job_title	Account Engagement
Last Name	last_name	Account Engagement
Updated At Date	updated_at	Account Engagement
User ID (external)	user_id	Account Engagement

Label	Field	Origin
Username	username*	Salesforce or Account Engagement

Pardot Visitor Dataset

The dataset ID is `pdVisitor`. Each row represents 1 day of statistics for an individual visitor. This dataset doesn't include data from archived visitors.

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

Account-Based Marketing Datasets

B2B Marketing Analytics features optional account-based marketing offerings that come from three datasets. These datasets include active data only. They exclude data from archived accounts.

Account-Based Marketing Contact—The dataset ID of this optional account-based marketing dataset is `pdAbmContact`. Each row 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 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

Label	Field
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 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 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

Label	Field
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