B2B Marketing Analytics Implementation Guide

Salesforce, Summer '20

@salesforcedocs

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SET UP B2B MARKETING ANALYTICS

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

Before you begin, you must have a verified Salesforce-Pardot connector. See Setting Up the Salesforce-Pardot Connector for Accounts Purchased Before February 11, 2019

Guidelines for Setting Up B2B Marketing Analytics

The setup process for B2B Marketing Analytics varies based on when the feature was purchased or previously set up.

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 Analytics Studio terminology.

Guidelines for Setting Up B2B Marketing Analytics

The setup process for B2B Marketing Analytics varies based on when the feature was purchased or previously set up.

EDITIONS

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

Note: In Spring '19, Salesforce released a template-based analytics app for B2B Marketing. Your permission set license and which B2B Marketing Analytics version you're using affects how you enable or upgrade the Winter '20 release. The Winter '20 version is called B2B Marketing Analytics 2.0.

Review the setup scenarios that are relevant to you, and check out the resource links for details about each step. For information about legacy B2B Marketing Analytics, check out Migration for Legacy Users on page 7.

Set Up for Add-On Users with the App Template

I purchased B2B Marketing Analytics as an add-on to Pardot Pro or Ultimate, and I migrated to the app template after February 2019.

You're using the Spring '19 release version of B2B Marketing Analytics. The permission set license in your account is called Analytics Embedded App.

1. Add the Create B2B Marketing Analytics Apps user permission to the Manage Analytics Templated Apps and Use Analytics Templated Apps permission sets.

2. Open a B2B Marketing Analytics app and upgrade it.
3. Make sure that your dashboards appear as expected. Knowledge Article: Restore custom dashboards
4. Uninstall the Spring '19 B2B Marketing Analytics managed package.

Set Up for Pardot Plus and Advanced Users with the App Template

I got B2B Marketing Analytics when I purchased Pardot Plus or Advanced, and I set up an app after February 2019.

You're using the Spring '19 release version of B2B Marketing Analytics. The permission set license in your account is called B2B Marketing Analytics.

1. Open a B2B Marketing Analytics app and upgrade it.
2. Make sure that your dashboards appear as expected. Knowledge Article: Restore custom dashboards
3. Uninstall the Spring '19 B2B Marketing Analytics managed package.

Set Up for New Pardot Plus and Advanced Users

I got B2B Marketing Analytics when I purchased Pardot Plus or Advanced, and I haven't set it up yet.

You're using the Spring '19 release version of B2B Marketing Analytics. The permission set license in your account is called B2B Marketing Analytics.

1. Review and enable prerequisite settings.
2. Assign the B2B Marketing Analytics permission set to the connector user and sales and marketing users.
3. Create apps.

Set Up for B2B Marketing Analytics Users with an Einstein Analytics Platform license

I have the B2B Marketing Analytics add-on, and I haven't set it up yet.

You're using the Winter '20 release version of B2B Marketing Analytics. The permission set license in your account is called Einstein Analytics Platform.

1. Review and enable prerequisite settings.
2. Assign the Einstein Analytics Plus or Einstein Analytics Growth permission set to the connector user and sales and marketing users.
3. Create apps.

Prerequisites for B2B Marketing Analytics

For B2B Marketing Analytics to install correctly, you have to enable some features, and in some cases, create permission sets. If you plan to create the optional dashboard for Multi-Touch Attribution, configure Campaign Influence also.

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.

Prerequisites for B2B Marketing Analytics

For B2B Marketing Analytics to install correctly, you have to enable some features, and in some cases, create permission sets. If you plan to create the optional dashboard for Multi-Touch Attribution, configure Campaign Influence also.

To prepare your org for the B2B Marketing Analytics app, enable the Analytics platform for your org, and assign permissions for Pardot and Salesforce data sharing.

1. In the Salesforce Setup, enter `Analytics` in the Quick Find box and select **Getting Started**.
2. Click **Enable Analytics**.
3. Enable Data Sync and Connections.
4. Review or configure the correct permission sets.

   There are four permission set licenses that work with the B2B Marketing Analytics app.

   - B2B Marketing Analytics: This permission set license comes with the permission set needed for all users. Assign the B2B Marketing Analytics permission set to the connector user and other users who need access to B2B Marketing Analytics dashboards and apps.
   - Analytics Embedded Apps: Before you can assign permissions, you must create or edit the Manage Analytics Templated Apps and Use Analytics Templated Apps permission sets.
     - Base each permission set on the Embedded Analytics Apps permission set license.
     - For the Manage permission set, allow all the available permissions and make sure that you include the Create B2B Marketing Analytics Apps and Manage Analytics Templated Apps user permissions. Then, assign the Manage permission set to the connector user and other power users.
     - For the Use permission set, allow the permissions you want a typical user to have, and make sure that you include the Create B2B Marketing Analytics Apps and Use Analytics Templated Apps user permissions. Then, assign the Use permission set to users who need access to B2B Marketing Analytics dashboards and apps.
   - Analytics Platform: Analytics platform licenses include the Einstein Analytics Plus and Einstein Analytics Growth permission set licenses, which contain two permission sets that grant access to B2B Marketing Analytics. You can use the standard permission sets or create custom permission set using these permissions.
     - Manage Analytics
     - Manage Analytics Templated Apps
     - Use Analytics
     - Use Analytics Templated Apps

> Note: To make sure that apps get the newest datasets, each user with the Manage Templated Analytics Apps permission is given Editor access to new apps. To restrict this ability, or if it looks like datasets aren't updating as expected, review which users have this permission assigned. Click the dropdown next to any app and open the Share settings.

EDITIONS

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

USER PERMISSIONS

To enable Analytics platform:
- Customize Application

To create permission sets:
- Manage Profiles AND Permission Sets

Enable Analytics

To use the Analytics platform, first enable it for your organization.

Enable Data Sync and Connections

Data Sync is enabled by default if you turned on Analytics after the Winter '20 release. If you turned on Analytics before the Winter '20 release, manually enable Data Sync and Connections to optimize your dataflows and connect to external data.

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

Enable Analytics

To use the Analytics platform, first enable it for your organization.

Note: Skip this step if Analytics is already enabled.

1. From Setup, enter `Analytics` in the Quick Find box, and select **Getting Started**.
2. Click **Enable Analytics**.

Enable Data Sync and Connections

Data Sync is enabled by default if you turned on Analytics after the Winter '20 release. If you turned on Analytics before the Winter '20 release, manually enable Data Sync and Connections to optimize your dataflows and connect to external data.

Important: Before you enable Data Sync, we recommend that you read Understand What Happens When You Enable Data Sync and Connections.

1. From Setup, enter `Analytics` in the Quick Find box, then select **Settings**.
2. Select **Enable Data Sync and Connections** and **Enable Analytics Templates**.
3. Save your changes.

Important: After you enable Data Sync and Connections, make sure that you run data sync before your dataflows next run. Dataflows with sfdcDigest nodes fail until data sync has run and completed for the first time. See Schedule, Run, and Monitor Data Sync.

EDITIONS

Available in Salesforce Classic and Lightning Experience.

Available for an extra cost in **Enterprise**, **Performance**, and **Unlimited** Editions. Also available in **Developer** Edition.

USER PERMISSIONS

To enable data sync and connections:
- Customize Application

Permissions for B2B Marketing Analytics

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

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

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

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

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

USER PERMISSIONS

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

Connector User

The connector user is found in orgs with the v1 Salesforce-Pardot connector.

Permission Set Licenses

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

Permission Sets

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

System Permissions

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

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

Integration User

The connector user is found in orgs with the v2 Salesforce-Pardot connector.

Permission Set Licenses

- B2B Marketing Analytics

Permission Sets

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

System Permissions

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

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

Manage Analytics User

Permission Set Licenses

- B2B Marketing Analytics

- CRM User OR Sales User OR Service User

Permission Sets

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

System Permissions

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

- Create B2B Marketing Analytics Apps
- Download Analytics Data
- Edit Analytics Dataflows
- Manage Analytics Templated Apps
- Use 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
- CRM User OR Sales User OR Service User

Permission Sets

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

System Permissions

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

- B2B Marketing Analytics Apps
- Use Analytics Templated Apps

Create Permission Sets

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

Create Permission Sets

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

EDITIONS

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

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

USER PERMISSIONS

To create permission sets:
- "Manage Profiles and Permission Sets"

To assign permission sets:
- "Assign Permission Sets"

Tip: If your org has a large number of permission sets, using permission set groups might help improve performance.

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

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

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

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

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

Note:

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

Migration for Legacy Users

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

EDITIONS

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

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 Your Upgrade

Set Up for Legacy Add-On Users

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

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

1. Review the prerequisite settings.
2. Create the Manage Analytics Templated Apps permission set, and assign it to the connector user.
3. Create the Use 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 Analytics Embedded App License
The app version you use determines which permissions are available. After you determine which permission set license your org uses, assign the other permission sets and system permissions to different types of users.

Permissions for Analytics Embedded App License

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

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

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

EDITIONS

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

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

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

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
- Pardot Connector User (v1) or Pardot Integration User (v2)
- CRM User OR Sales Cloud User OR Service Cloud User

- Manage Templated Analytics Apps (custom)

System Permissions

Make sure that the Manage Templated Analytics Apps Permission Set includes these system permissions.

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

Use Analytics Salesforce User

Permission Set Licenses

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

Permission Sets

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

System Permissions

Make sure that the Use Templated Analytics Apps Permission Set includes these system permissions.

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

Considerations for B2B Marketing Analytics

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

EDITIONS

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

Setting It Up

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

Updating the App Template

- B2B Marketing Analytics is built on Salesforce's 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 Pardot elements.
- To migrate customizations, move dashboards, datasets, and saved lenses into My Shared App or My Private App. Next, upgrade the app and edit the existing queries to reference the new dataset IDs. Confirm that important assets and customizations are available in the new app.
- Choose whether to keep older versions of apps for reference or delete them. When a new app is available, the previous version is no longer updated or supported.

Using Pardot Business Units

- To use B2B Marketing Analytics with Pardot Business Units, you need an Einstein Analytics Growth or Plus platform license. We recommend using a partner to assist you in aggregating custom datasets and creating global dashboards.
- Make sure that you read about Data Sync before you use the B2B Marketing Analytics app with multiple business units or Einstein Behavior Scoring: Understand What Happens When You Enable Data Sync and Connections

Using B2B Marketing Analytics

Note: As of the Summer '20 release, datasets in legacy B2B Marketing Analytics apps are no longer updated. Legacy apps include any custom apps you made without selecting the B2B Marketing Analytics app template during setup. For the latest datasets and features, re-create your apps with the B2B Marketing Analytics app template.

- B2B Marketing Analytics uses the currency setting from your Pardot account. Regardless of locale settings, currency formats in 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.
- Analytics Studio contains a Pardot Engagement History app, which is read-only. 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 Einstein Analytics app for iOS.

Working with Data

- B2B Marketing Analytics uses Bulk API calls to aggregate data in the datasets. This usage doesn't count against your Salesforce or Pardot API request limits.
- External datasets originate in Pardot and can't be edited in the Data Manager. They're updated every 24 hours and can't be synced manually. The external datasets are:
  - Pardot Campaign
  - Pardot Email
  - Pardot Email Template
  - Pardot Form and Form Handler

- Pardot Landing Page
- Pardot Opportunity
- Pardot Prospect
- Pardot Tags
- Pardot Visitor

- For other datasets, you can schedule sync to avoid overlap and improve performance. Learn how to Schedule Data Sync to Run Automatically.
- If you use B2B Marketing Analytics without embedded Engagement History dashboards enabled, you can sync up to 25 million rows of data.
- For Growth Edition, Engagement History can sync up to 90 days or 10 million rows of data, whichever comes first. For Plus Edition and Advanced Edition where B2B Marketing Analytics is enabled, these features can sync up to 3 years or 35 million rows in total.
- Due to date filters, time zones and other factors, you can encounter discrepancies between Pardot reporting data and B2B Marketing Analytics data. Find out more in this Knowledge Article: Data Discrepancies in B2B Marketing Analytics.

Create and Upgrade B2B Marketing Analytics Apps

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

EDITIONS

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

Create a B2B Marketing Analytics App

To create a B2B Marketing Analytics app in your org, navigate to 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

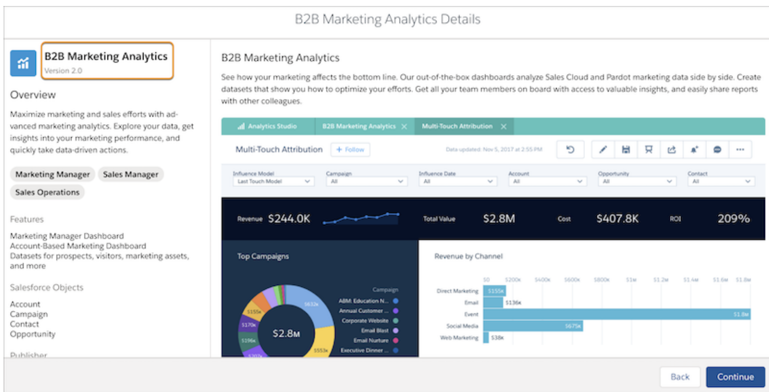
Each time Salesforce releases new datasets and improvements to the B2B Marketing Analytics template, each user must update their B2B Marketing Analytics app. When an upgrade is available, a link to upgrade appears in the app header.

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.

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 use the Account-Based Marketing Dashboard or the Multi-Touch Attribution Dashboard. Both dashboards are optional. You can also add the Prospect and Activity Dataset, after you enable it in Salesforce Setup.

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

USER PERMISSIONS

To create a B2B Marketing Analytics app:

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

To use B2B Marketing Analytics

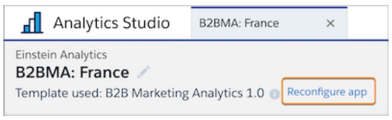
- Use Analytics Templated Apps AND Create B2B Marketing Analytics Apps OR B2B Marketing Analytics permission set

Reconfigure B2B Marketing Analytics

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

Note: Custom dashboards are overwritten during this process.

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 though the setup questions.
4. Click **Done**.

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

EDITIONS

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

USER PERMISSIONS

To reconfigure B2B Marketing Analytics

- Manage 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.

Note: The Winter '19 release requires users with the app template to upgrade their apps. After upgrading, all your standard dashboards continue to work as expected. Custom dashboards require manual dataset updates. Knowledge Article: Restore Custom Dashboards in B2B Marketing Analytics

1. Open your B2B Marketing Analytics app in Analytics Studio.
2. Click **Upgrade to new version**.

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

3. Review the release notes provided and continue through the setup questions.
4. Choose to overwrite your app or create a new one.

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

EDITIONS

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

USER PERMISSIONS

To upgrade B2B Marketing Analytics:

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

To use B2B Marketing Analytics

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

Optional Uses for B2B Marketing Analytics

EDITIONS

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

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

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

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

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

Account-Based Marketing Dashboard

EDITIONS

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

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`.

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

Dataset Reference

Account-Based Marketing Contact Dataset

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

Account-Based Marketing Event Dataset

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

Account-Based Marketing Opportunity Dataset

Label	Field
Account Industry	AccountId.Industry
Account Name	AccountId.Name
Account Owner ID	AccountId.OwnerId.Id
Amount	Amount
Close Date	CloseDate
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 information 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 Single Field on All Profiles

Give Analytics Integration User Access to B2B Marketing Analytics

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

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

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

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

Set Field-Level Security for a Single Field on All Profiles

1. From the management settings for the field's object, go to the fields area.
2. Select the field you want to modify.
3. Click **View Field Accessibility**.
4. Specify the field's access level.

EDITIONS

Available in: Salesforce Classic (not available in all orgs)

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

USER PERMISSIONS

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

  AND

  Customize Application

Multi-Touch Attribution Dashboard

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

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

EDITIONS

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

Dashboard Reference

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

Dataset Reference

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

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

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

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

Enable Connected Campaigns

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

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

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

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

EDITIONS

Available in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions with any Pardot Edition

USER PERMISSIONS

To connect Pardot campaigns to Salesforce campaigns:

- General Account Administration

  AND

  Pardot Marketing User role

  AND

  B2B Marketing Automation App permission set license

Note:

- Make sure that you create counterpart campaigns in Salesforce for Pardot's default and required campaigns, including Website Tracking and Salesforce Sync. If you aren't using the Email Plug-in campaign, delete it before you connect.
- A Pardot campaign is updated or created each time the Salesforce campaign is edited by a person or process. To limit the number of campaigns created in Pardot, identify a cut-off date for replication.

1. Open the Connected Campaigns page.
   - In Pardot, open **Settings** and click **Edit**. Scroll to Connected Campaigns.
   - In the Lightning app, click the **Pardot Settings** tab, and then select **Connectors**. Click to edit the Salesforce connector, and select the **Campaigns** tab.
2. Select **Enable Connected Campaigns and Engagement History**.
3. Select the Salesforce campaign record types that can be connected.
4. Save your work.

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

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

1. In the same connector settings, select **Use Salesforce to manage all campaigns**.
2. If you want to reduce the number of campaigns that are replicated over time, enter a date under **Limit Campaign Creation by Date**.
3. To let Pardot users continue to see the remaining unconnected campaigns, select **Show Unconnected Campaigns**.

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

Prospect and Activity Dataset

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

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

EDITIONS

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

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.

Account
: Name of the account associated with prospect activity

Account ID
: Salesforce identifier for the prospect's associated account

Account Name
: Name of the prospect's associated account

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

Activity Campaign ID
: Salesforce identifier for the associated campaign

Activity Campaign Name
: Campaign associated with the activity

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

Address One
: Address one field associated with the prospect

Address Two
: Address two field associated with the prospect

Annual Revenue
: The prospect's associated company's annual revenue

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

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

Asset ID
: Salesforce identifier for the asset a prospect engaged with

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

Asset Type
The type of asset a prospect engaged with

Assigned User First Name
First name of the prospect's assigned Pardot user

Assigned User Full Name
Full name of the prospect's assigned Pardot user

Assigned User Last Name
Last name of the prospect's assigned Pardot user

CRM Contact FID
Salesforce identifier for the contact record associated with the prospect

CRM Lead FID
Salesforce identifier for the lead record associated with the prospect

CRM Owner FID
Salesforce identifier for the prospect owner

City
The prospect's city

Comments
The text of Pardot user comments associated with the prospect

Company
The prospect's company

Country
The prospect's country

Created by First Name
First name of the Pardot user who created the prospect

Created by Full Name
Full name of the Pardot user who created the prospect

Created by Last Name
Last name of the Pardot user who created the prospect

Department
The prospect's department

Email
The prospect's email address

Employees
Number of employees working at the prospect's company

External ID
Pardot identifier for the prospect.

Fax
The prospect's fax number

First Name
The prospect's first name

Full Name
The prospect's full name

Grade
The prospect's Pardot Grade

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

Industry
The prospect's industry

Is Do Not Call
True or false. Whether the prospect can receive phone calls.

Is Do Not Email
True or false. Whether the prospect can receive emails

Job Title
The prospect's job title

Last Name
The prospect's last name

Name
The prospect's full name

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

Pardot Account ID (external)
Pardot identifier for the prospect. This field is used to match Pardot prospects to CRM leads and contacts.

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

Pardot Asset ID
Pardot identifier for the asset a prospect engaged with

Phone
The prospect's phone number

Prospect Archived
True or false. Whether the prospect has been archived

Prospect Assigned Date
Date a prospect was assigned to a user (UTC)

Prospect CRM Last Activity Date
Date of the prospect's last recorded interaction with an asset (UTC)

Prospect Created At Date
Date the prospect was created in Pardot

Prospect ID (external)
Pardot identifier for the prospect. This field is used to match Pardot prospects to CRM leads and contacts.

Prospect Job Title
The prospect's job title

Prospect Last Activity Date
Date of the prospect's last activity recorded

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

Prospect Type
Type of record: Prospect, Lead, or Contact

Prospect Updated At Date
Date a prospect was last updated

Salutation
The prospect's preferred title

Score
The prospect's Pardot Score

Source
How the prospect was added to Pardot

Source Campaign
The name of the associated Pardot campaign

State
The prospect's state

Tags
Tags associated with the prospect

Territory
The prospect's territory

Updated by First Name
First name of the Pardot user who last updated the prospect

Updated by Last Name
Last name of the Pardot user who last updated the prospect

Website
Website URL associated with the prospect's company

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

Zip
The prospect's ZIP code

Member Values for Recipes

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

Field Label: Asset Type

Form, "1"

List Email, "2"

Custom Url, "4"

Landing Page, "5"

Form Handler, "6"

Automated Email, "7"

Website Visit, "8"

Priority Page View, “9”

Field Label: Activity Type

Click, “1”, “21”

View, “2”

Success, “4”

Open, “11”

Visit, “20”

Field Label: Asset Activity

Form View, “1 2”

Form Success, “1 4”

List Email Click, “2 1”

List Email Open, “2 11”

File View, “3 2”

Custom Url Click, “4 21”

Landing Page View, “5 2”

Landing Page Success, “5 4”

Form Handler Success, “6 4”

Automated Email Click, “7 1”

Automated Email Open, “7 11”

Website Visit, “8 20”

Priority Page View, “9 2”

Field Label: Prospect Type

Lead, “1”

Contact, “2”

Prospect, “3”

B2B Marketing Analytics Glossary

Familiarize yourself with common Analytics Studio terminology.

Aggregate

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

App

In Analytics, an app contains dashboards, lenses, and datasets in any combination that makes sense for sharing your data analyses 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.