Pardot Setup Implementation Guide

Salesforce, Spring '21

@salesforcedocs

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INTRODUCTION

Pardot is your solution for B2B marketing automation and includes powerful tools that generate leads so your sales team can close more deals. This guide helps you get your Pardot business unit online and ready for your marketing team to build out marketing assets and get campaigns underway.

Setup includes tasks that often span multiple teams, so it's important to have everything you need in place before you begin. Use the planning worksheet in this guide to get organized and identify who you need to successfully set up Pardot. If you're setting up more than one business unit, we recommend you complete an implementation plan for each business unit.

PLAN YOUR PARDOT IMPLEMENTATION

Print or save this worksheet to help you map out your implementation from start to finish. If you're using multiple Pardot business units, make a copy for each one. Some setup tasks require both a Salesforce admin and a Pardot admin to complete. We strongly recommend your implementation stakeholders plan and collaborate closely to execute setup tasks.

Download the Pardot Implementation Planning Worksheet

INSTALL THE APPEXCHANGE PACKAGE AND ENABLE PARDOT

First, your Salesforce admin must install the Pardot AppExchange Package, then enable Pardot in Salesforce Setup. After you enable Pardot and assign an admin, set up Salesforce User Sync.

EDITIONS

Available in: All Pardot Editions

Install the Pardot AppExchange Application

Before setting up your Salesforce connector in Pardot, install the Pardot AppExchange package in your Salesforce org.

Enable Pardot in Salesforce

A Salesforce admin must enable new Pardot business units and appoint a Pardot admin. If you have multiple Pardot Business Units, appoint a Pardot admin to each unit.

Install the Pardot AppExchange Application

Before setting up your Salesforce connector in Pardot, install the Pardot AppExchange package in your Salesforce org.

USER PERMISSIONS

To install the Pardot package:

- Download AppExchange Packages (in Salesforce)

Important: Do not install the package directly from AppExchange. You must install the package as described here.

1. Get the installation link.

   This package updates your Salesforce account with a custom application, custom tab, and custom fields under leads and contacts. You might need to modify your view to display the fields.

2. Review actions, and click **Install**.
3. On Step 2 of the install wizard (Choose security level), select **Grant access to admins only**.

Enable Pardot in Salesforce

A Salesforce admin must enable new Pardot business units and appoint a Pardot admin. If you have multiple Pardot Business Units, appoint a Pardot admin to each unit.

1. From Marketing Setup, under Pardot Setup Home, click **Assign Admin**.
2. Name your business unit and assign your Pardot admin. If you're working with multiple business units, we recommend setting up one business unit at a time.
3. Save your changes. After you save, Pardot sends the Pardot admin an email to start the setup process for their business unit.
4. From Marketing Setup under Pardot Setup Home, turn on Pardot in your Salesforce org to make the Pardot Lightning app available only to your Pardot admins.

After you complete provisioning and admin assignment, contact your Pardot admin to make sure they received the email to set up their assigned business unit. Work closely with your Pardot admin to complete key Pardot setup tasks, such as setting up Salesforce User Sync.

EDITIONS

Available in: All Pardot editions purchased after February 11, 2019. Pardot Business Units are available in Pardot **Advanced** Edition.

USER PERMISSIONS

To enable Pardot for your org:

- Customize Application and Modify All Data

To create Pardot Business Units:

- Customize Application and Modify All Data

SET UP SALESFORCE USER SYNC

Salesforce User Sync makes it easy to create and manage Pardot users from Salesforce, so we strongly recommend you set it up as part of your Pardot implementation. To set up User Sync, your Salesforce admin assigns users to Pardot from Salesforce. Then, your Pardot admin transfers user management from Pardot to Salesforce.

EDITIONS

Available in: Pardot business units created after the Summer '20 release

Considerations for Salesforce User Sync

Salesforce User Sync simplifies Pardot user creation and management. Before you get started setting up your users, keep these considerations in mind.

- These instructions are for new Pardot customers who don't have users in Pardot yet. If you already have users in your Pardot business unit, see Connect Pardot and Salesforce Users.
- After you transfer user management to Salesforce, all users assigned to Pardot from Salesforce have a profile in Pardot.
- After you transfer user management to Salesforce, all user creation and management is done in Salesforce. Changes you make to user records typically sync within 10 minutes. If you have a large number of users, it can take up to an hour.
- Synced users respect all Salesforce login restrictions such as allowlisted IP ranges and restricted login hours.
- Some Pardot user fields don't sync to Salesforce, such as URL, HTML email signature, text email signature, role, and tags. You can edit these fields in Pardot. All other user fields are edited in Salesforce.
- If a synced user's Salesforce language is set to Japanese, French, German, or Spanish, the Pardot language updates to reflect the language. Users can change this setting in their Pardot user preferences.

Identify or Create Users in Salesforce

Before you set up Salesforce User Sync, make sure you know which users need Pardot access. If you're brand new to Salesforce, create new users that you then assign to Pardot.

SEE ALSO:

Add a Single User

Add Multiple Users

Assign Salesforce Users to Pardot

EDITIONS

Available in: Pardot business units created after the Summer '20 release

USER PERMISSIONS

To assign Salesforce users to Pardot business units:
- Customize application and manage users

First, have your Salesforce admin assign Salesforce users to Pardot. We recommend you begin with the users necessary to complete your Pardot implementation. You can come back to Salesforce Setup at any time to assign more users to Pardot. After users are assigned, your Pardot admin can transfer user management to Salesforce. Assigned Pardot users don't have access to Pardot until you set up permissions for the Pardot Lightning App.

Note: Users assigned to the Sales Users group in Salesforce are given the Sales role in Pardot. Changing a user's Pardot role must be done in Salesforce not in Pardot.

1. From Setup, in the Quick Find box, enter Pardot, then select **Pardot Account Setup**.
2. Next to your business unit, click **Manage Users**.
3. Click **Edit User Assignments**.
4. Use the dropdowns to add users to the Marketing Users group and the Sales Users group.
5. Save your changes. To see a complete list of your Pardot-assigned users, click View All Users.

After you assign users to Pardot, the Pardot admin can transfer user management to Salesforce. When user management is transferred, a Pardot profile is created for each assigned user.

Transfer User Management to Salesforce

EDITIONS

Available in: Pardot business units created after the Summer '20 release

USER PERMISSIONS

To transfer user management to Salesforce:
- Pardot Administrator role

After your Salesforce admin has assigned users to Pardot, your Pardot admin can map Salesforce profiles to roles in Pardot. Then, the Pardot admin transfers user management to Salesforce which creates a Pardot profile for each user assigned from Salesforce.

1. Open the Salesforce connector page and select Pardot Settings, and then Connectors.
2. Click next to the Salesforce connector and select **Edit Settings**.
3. Click the **User Sync** tab.
4. Map Salesforce profiles to Pardot roles using the dropdowns.
5. Save your changes, then click **Opt In** to opt into Salesforce-side user management.

After user management is transferred to Salesforce, Pardot users will be automatically created for each user assigned to Pardot in Salesforce. User changes in Salesforce take about 10 minutes to take effect in Pardot.

SET UP THE PARDOT LIGHTNING APP

Set up the Pardot Lightning app to grant users access to Pardot. The Pardot Lightning app offers an elevated integration experience and allows your sales and marketing teams to work side-by-side on one platform.

EDITIONS

Available in: All Pardot Editions

Give Users Access to the Pardot Lightning App

EDITIONS

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

USER PERMISSIONS

To enable the Pardot Lightning app:
- Customize Application

To edit app permissions:
- Manage Profiles and Permission Sets

Admins can enable Pardot in Lightning Experience and assign the required permission to users.

1. Verify that your Pardot and Salesforce users are linked. We strongly recommend Salesforce User Sync. See Manage Users with Salesforce.
2. From Marketing Setup, make sure Pardot is enabled to make the app available in your org.
3. Give users access to the Pardot connected app.
   a. From Marketing Setup, in the Quick Find box, enter `Manage Connected Apps`, then select **b2bma_canvas**.
   b. Use Manage Profiles and Manage Permission Sets to assign the connected app to the profiles or permissions sets for users who need to access the Pardot Lightning app.
4. Assign the Sales Cloud User, Service Cloud User, or CRM User permission set.
   a. From Salesforce Setup, in the Quick Find box, enter `Permission Sets`, then select **Sales Cloud User**, **Service Cloud User**, or **CRM User** from the list.
   b. Click **Manage Assignments**.
   c. Click **Add Assignments** and choose all users who need access to the Pardot Lightning app.

   Note: If you don't want to use one of the recommended permission sets, create and assign a permission set with the 'Allow access to all Pardot features' app permission. Don't choose a license for the new permission set.

5. Make the Pardot Lightning app visible to profiles.
   a. From Salesforce Setup, in the Quick Find box, enter `App Manager`, and then select **App Manager**.
   b. Find the Pardot app with the App Type `Lightning`, and then edit it.
   c. Click **User Profiles**, and then select all profiles that need access to the app.

After the app is enabled, it appears in the App Launcher for all users with a Sales Cloud, Service Cloud, or CRM user seat who have the app permission assigned.

Remove the Pardot Classic App

After you enable the Pardot Lightning app, two Pardot apps appear in your account. One is the Lightning app, and the other is Pardot Classic. To avoid confusing your users, remove access to the Pardot Classic app for all profiles.

1. From Setup, in the Quick Find box, enter *`App Manager`*, and then select **App Manager**.
2. Find the Pardot app with the Developer Name `ProspectInsight`, and then edit it.
3. Scroll to Assigned Profiles, and then deselect **Visible** for all profiles.

USER PERMISSIONS

To remove the Pardot Classic app:

- Customize Application

TRACK PROSPECT ENGAGEMENT IN SALESFORCE

Your campaigns track valuable engagement data that can tell you how well your marketing assets resonate with your customer base. When you collect all the activity types and metrics in one place, you have what we call Engagement History. Decide what data is most valuable to you and your users, and surface it throughout Salesforce.

To see all the available features and how to use them, check out Use Engagement History.

Note: Engagement History dashboards aren't supported in Pardot Sandboxes.

EDITIONS

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

Turn On Engagement History Dashboards

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

1. From Marketing Setup, in the Quick Find box, enter `Engagement History` and select **Engagement History**.
2. To turn on Embedded Engagement History Dashboards, follow the steps on the setup page.
3. Using the Lightning App Builder, find the Engagement History Dashboard component and drag it into a tab.

   Note: The Engagement History Dashboard component appears in Standard components section.

4. Assign the Analytics View Only Embedded App permission set to each user who wants to see the dashboard.

Note: If your account doesn't have the system users Analytics Cloud Integration User and Analytics Cloud Security User, they're added to your account when you enable the feature.

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

EDITIONS

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

USER PERMISSIONS

To enable Engagement History Dashboards:

- Customize Application

To view Engagement History Dashboards:

- Analytics View Only Embedded App permission set

MAP PARDOT AND SALESFORCE FIELDS

To make sure Pardot and Salesforce share data properly, edit your lead and contact page layouts in Salesforce and map Salesforce and Pardot fields.

EDITIONS

Available in: All Pardot Editions

Map Pardot Custom Lead Fields to Contact Fields

Mapping fields in Salesforce ensures that the contact record pulls in all Pardot data from the lead record during conversion.

USER PERMISSIONS

To map lead fields:
- Customize Application (in Salesforce)

Important: Do not map the Pardot URL lead field and Pardot URL contact field. Mapping these fields to each other creates duplicate prospects and breaks Visualforce pages.

1. Navigate to the object management settings for leads.
2. In the Lead Custom Fields & Relationships section, click **Map Lead Fields**.
3. Click the **Contact** tab, and map the fields.
4. Save when finished.

Create Custom Prospect Fields

When Pardot's default fields don't capture the prospect data you need, create your own custom fields. You can map and sync your custom fields with the CRM.

EDITIONS

Available in: All Pardot Editions

USER PERMISSIONS

To create custom fields:
- Pardot Administrator role

1. Open the Prospect Fields page.
   - In Pardot, select **Admin** > **Configure Fields** > **Prospect Fields**.
   - In the Lightning app, select **Pardot Settings**, and then **Object and Field Configuration** > **Prospect Fields**.
2. Click **+ Add Custom Field**.
3. Name the field. The name is used internally for identification, and is not visible to prospects.

4. Don't edit Custom Field ID. This ID is not visible to prospects.
5. Configure field settings.
6. When finished, click **Create custom field** to save.

Map Salesforce and Pardot Custom Fields

USER PERMISSIONS

To map fields:
- Pardot Administrator role

A Pardot admin can map prospect and account custom fields so that they can sync between Pardot and Salesforce.

Note: Before you can map Pardot and Salesforce custom fields, you must create the corresponding custom field in Pardot.

Keep these considerations in mind when mapping fields.

- If a Salesforce field is already mapped to a Pardot field, it doesn't display in the dropdown.
- Custom field mapping is case sensitive.
- To map a custom field on both the lead object and contact object to the same Pardot field, the API name of the Salesforce fields must be identical.
- Pardot fields don't sync with lookup or geolocation Salesforce field types.
- Don't map Pardot number type fields to Salesforce phone type fields. Phone fields contain non-number characters and don't sync to Pardot correctly. Instead, map Salesforce phone type fields to Pardot text type fields.

1. In Pardot, open the custom field for editing.
2. From the Salesforce Field Name dropdown, choose the field you want to map.
3. (Optional) Enable **Keep this field's type and possible values (for dropdowns, radio buttons, checkboxes) in sync with the CRM**. This setting syncs field setting changes from Salesforce to Pardot.
4. (Optional) Edit sync behavior.

Repeat these steps for each custom field you want to sync.

Note: Mapping a Pardot custom field with a Salesforce field does not trigger a sync with the CRM.

Show Pardot Data in Salesforce

USER PERMISSIONS

To customize page layouts:
- Customize Application (in Salesforce)

The AppExchange application adds Pardot fields and Visualforce pages, but they're not displayed. To display the Pardot fields and Visualforce pages in Salesforce, add them to your Salesforce lead and contact page layouts.

1. Open your lead or contact page layout for editing.
2. Add the Pardot custom fields to the page layout.
   a. Add a section to the layout.
   b. Name the section.
   c. Select **2-Column**, and click **OK**.
   d. Return to the Fields section of the drag-and-drop editor, and scroll right to locate the Pardot custom fields.
   e. Drag all the Pardot custom fields to the new section.
   f. (Optional) Drag the Google Analytics fields to the section.

3. Add Pardot activities and list membership to your layout.
    a. Add a section to the layout.
    b. Name the section.
    c. Select **1-Column**, and click **OK**.
    d. In the editor, scroll to the Visualforce Pages section.
    e. Drag Pardot Activities, Pardot List Membership, and Pardot Social Data to the new section.
4. Save your layout when finished.

Repeat these steps for lead and contact page layouts.

MANAGE AND UNPAUSE THE SALESFORCE-PARDOT CONNECTOR

New Pardot accounts come equipped with Version 2 of the Salesforce-Pardot connector, which is created in a paused state. There are a few things we recommend you have set up before you unpause the connector and begin syncing data with Salesforce.

EDITIONS

Available in: All Pardot Editions

SEE ALSO:

Salesforce-Pardot Connector Settings

Set Up Connected Campaigns

It's a great idea to connect your Pardot and Salesforce campaigns. You can save time, reduce clutter, and get access to valuable cross-product features. For example, work with campaign influence attribution models, Engagement History, and Pardot Einstein Campaign Insights for a complete view of your business. Plus, you can work with Pardot prospects and data without leaving Salesforce.

EDITIONS

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

SEE ALSO:

Connected Campaigns Implementation Guide

Define Marketing Data Sharing Rules

If you're a Pardot Advanced or Premium customer, you can use Marketing Data Sharing rules to define what data you want to sync with Salesforce objects.

EDITIONS

Available in: Pardot **Advanced** and **Premium** Editions

Note: Sometimes, assigned users have more access to CRM data in Pardot than they do in Salesforce. To restrict access, manually create sharing rules that match your Marketing Data Sharing rules and apply them to the Pardot marketing user group.

SEE ALSO:

Marketing Data Sharing

Configure and Unpause the Salesforce-Pardot Connector in Pardot (Connector v2)

Version 2 of Salesforce-Pardot connector is created in a paused state. A Pardot admin must configure the connector and unpause it to begin syncing data.

1. Open the Salesforce connector page.
   - In Pardot, select **Admin** and then **Connectors**. Click next to the Salesforce connector, and select **Edit**.
   - In the Lightning app, select **Pardot Settings**, and then **Connectors**. Click next to the Salesforce connector, and select **Edit Settings**.
2. Review your connector settings.
3. To begin syncing, click the icon, and select **Unpause**.

   Note: The connector uses the integration user to sync. If you want to selectively sync records, change the connector user to a user with the appropriate permissions or set up Marketing Data Sharing before unpausing.

ADD A TRACKER DOMAIN

Add tracker domains to your account using CNAME records for link rewriting and vanity URLs.

USER PERMISSIONS

To manage domains in Pardot:

- Pardot Administrator role

Note: Work with your IT team or hosting provider to complete these steps.

1. Open the Domain Management page.
   - In Pardot, select **Admin** and then **Domain Management**.
   - In the Lightning app, select **Pardot Settings**, and then **Domain Management**.
2. Scroll to Tracker Domains, and click **+ Add Tracker Domain**.
3. Work with your IT team or hosting provider to set up a CNAME record for the subdomain you want to use with Pardot. Set the record to point to go.pardot.com.
4. Choose whether to validate any parent domain or the root domain directly. Your IT team or hosting provider can help you add validation keys to your domain.
   - To validate a parent domain, copy the domain's validation key from the Tracker Domain table in Pardot. Set up a TXT record with an empty host (or the at [@] symbol), and then paste the domain's validation key into the TXT record. For example, if you use `go.marketing.yourdomain.com` as a tracker domain, the validation key is accepted in either `marketing.yourdomain.com` or `yourdomain.com`.
   - To validate the root domain, open the Tracker Domain table in Pardot, click **Tools**, then click **Download Validation File**. Add the downloaded file to the root domain. For example, if your tracker domain is www2.example.com and the validation file's name is `pardot_1234.txt`: http://example.com/pardot_1234.txt or http://www.example.com/pardot_1234.txt.
5. Wait for your DNS to propagate, which can take up to 24 hours.
6. From the Tracker Domain table in Pardot, click the gear icon for your domain, and click **Validate**.

By default, the first validated domain is set to primary. To use a different primary validated tracker domain, click the gear icon and select **Set as primary**.

You can designate one primary tracker domain per account, and it must be unique across all Pardot accounts. Each tracker domain counts toward your account limit, even if it's based on the same domain.

IMPLEMENT TRACKING CODE FOR FIRST-PARTY TRACKING

Each Pardot campaign has a unique tracking code that tracks visitor and prospect activity when added to your web pages.

1. Open the Domain Management page.
    - In Pardot, select **Admin** and then **Domain Management**.
    - In the Lightning app, select **Pardot Settings**, and then **Domain Management**.
2. Scroll to the Tracking Code Generator and select the domain you want to generate code for.
3. (Optional) Override the default campaign.
4. Copy the code.
5. In your web page HTML, paste the campaign tracking code before the close body tag (`</body>`).

EDITIONS

Available in: All Pardot Editions

USER PERMISSIONS

To view tracking code in Pardot:

- Pardot Administrator or Marketing role

IMPLEMENT DKIM AND SPF EMAIL AUTHENTICATION

To achieve the best deliverability with Pardot, implement email authentication. Pardot uses the two most common standards: SPF and DKIM.

EDITIONS

Available in: All Pardot Editions

USER PERMISSIONS

To check and verify DNS entries in Pardot:

- Pardot Administrator role

Note: This task requires editing your domain's DNS records. Contact your IT team or DNS provider for help.

Generate DomainKeys

In Pardot, generate DomainKeys for each domain you want to send email from.

1. Open the Domain Management page.
   - In Pardot, select **Admin** and then **Domain Management**.
   - In the Lightning app, select **Pardot Settings**, and then **Domain Management**.
2. Click **+ Add New Domain**.
3. Enter the domain you want to send emails from.
4. Click **Create domain**.
5. Click **Expected DNS Entries**.
6. Make note of the Domainkey_Policy and DomainKey values. You add these values to your DNS records.

Repeat these steps for each domain that you want to authenticate for email sending.

Add SPF and DKIM Records to Your DNS

Have your IT team add TXT records for SPF and DKIM to your sending domain's DNS record.

Note: Instructions for adding records to your DNS vary by provider. Ask your DNS provider for help if you're not sure how to add records.

1. Add Pardot's SPF statement to your SPF record.
   - If you don't have an SPF record, add a TXT record with this statement: `v=spf1 include:aspmx.pardot.com ~all`
   - If you do have an SPF record, add this statement, and move `~all` to the end: `include:aspmx.pardot.com`

   Note: The SPF protocol allows a maximum of 10 DNS lookups in an SPF statement. Pardot's include statement uses two.

2. Add records for DKIM.
    a. Add a TXT record and paste the Domainkey_Policy value that you generated in Pardot.
    b. Add a TXT record and paste the DomainKey value that you generated in Pardot.

Verify SPF and DKIM Entries

In Pardot, verify your SPF and DKIM records to complete the email authentication setup.

1. Open the Domain Management page.
    - In Pardot, select **Admin** and then **Domain Management**.
    - In the Lightning app, select **Pardot Settings**, and then **Domain Management**.
2. Next to your domain, click **Check DNS Entries**.

If your records were added correctly, your domains show as verified. If you have errors, click an error link for more information.

NEXT STEPS

After you complete the technical setup for Pardot, you can set up any additional Pardot features you need. At this point, you can also bring in your marketing team to start using Pardot.

Create and Customize Marketing Assets

After initial setup is complete, bring in your marketing team to get started creating assets and using Pardot. Take advantage of Pardot's folders and file hosting capabilities, and build out forms, landing pages, templates, and automations for your business.

Recommended Features and Add-Ons

Here are some features we recommend for getting the most out of Salesforce Pardot. Depending on your Pardot edition, these features are available as paid add-ons.

For more options on customizing the Salesforce-Pardot integration, check out Connecting Pardot and Salesforce.

- **Business to Business Marketing Analytics Plus (B2BMA+):** B2BMA+ is a growing collection of intelligent marketing tools for B2B marketers. The Account-Based Marketing and Marketing Campaign Intelligence apps help you explore your data and identify improvements with Einstein Discovery.
- **Salesforce Engage:** Salesforce Engage lets marketing share its content with sales to boost your company's selling power. Sales reps can use marketing-approved email templates to contact prospects at the right moment and track the effectiveness of the messages in Salesforce.
- **Sandboxes for Pardot:** Use Sandboxes for Pardot to test configuration changes before implementing them in your production account. A Sandbox for Pardot is a Pardot Business Unit that is provisioned from a Salesforce sandbox. Sandboxes for Pardot are available to Pardot Advanced and Premium customers, and as a paid add-on to Pardot Plus customers.

SEE ALSO:

B2B Marketing Analytics Plus

Salesforce Engage

Create a Sandbox for Pardot