Pardot Setup Implementation Guide

Salesforce, Spring ’20

@salesforcedocs

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CONTENTS

IMPLEMENTING PARDOT

This guide provides a deep look at some of the most critical pieces of a successful Pardot implementation.

Download the Pardot implementation worksheet to help you plan and stay organized during your implementation.

Who to Involve

Implementing Pardot involves stakeholders from across your company.

Use these examples to identify the key teams and individuals you must engage with to implement Pardot.

Stakeholder	Responsible For
Marketing team	Email creative, form and landing page design, lead-flow process, nurturing program design, PPC integration
Webmaster	Placing JavaScript tracking code within the element of the web page, implementing iframe code for Pardot forms
IT admin	Creating CNAME records for tracker domains, implementing email authentication
Marketing agency	Overall strategy for online marketing and lead management and nurturing, creative for landing page and email assets
Sales leadership	Coordinating sales training, adoption of email plug-in, working with marketing to set lead-assignment processes
Salesforce admin	Installing and configuring the Salesforce-Pardot connector

Technical Setup

Take care of some basic technical setup tasks to get Pardot up and running.

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

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

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.

View the Pardot Sending IP Address
When you need your sending IP for whitelisting, a Pardot admin can view their account's sending IP address information in the Account Information table.

Implement Tracking Code

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

1. In Pardot, navigate to the campaign you want to track.
2. Click **View Tracking Code**. Copy the code.
3. 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

Add a Tracker Domain

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

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

USER PERMISSIONS

To manage domains in Pardot:

- Pardot Administrator role

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 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.

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

EDITIONS

Available in: All Pardot Editions

USER PERMISSIONS

To check and verify DNS entries in Pardot:

- Pardot Administrator role

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.

View the Pardot Sending IP Address

When you need your sending IP for whitelisting, a Pardot admin can view their account's sending IP address information in the Account Information table.

1. From any page in Pardot, click the gear icon, then select **Settings**.
2. In the Account Information table, find the Sending IPs row.

EDITIONS

Available in: All Pardot Editions

USER PERMISSIONS

To view sending IP information:
- Pardot Administrator role

Add Users

Create users manually by importing them or using Salesforce User Sync.

Note: If you are integrating Pardot with your CRM, we recommend creating users with Salesforce User Sync during connector configuration. See Connect Pardot and Salesforce Users.

EDITIONS

Available in: All Pardot Editions

Add Users
Pardot admins can add users as needed.

Import Users
You can create or update up to 50 users at once by importing a .csv file.

Add Users

Pardot admins can add users as needed.

Note: If Salesforce User Sync is enabled in your account, we recommend creating users in Salesforce instead. If you map a user to a CRM username, the user converts to a synced user and is managed by Salesforce User Sync.

1. Open the Users page. Select **Admin** (**Pardot Settings** in the Lightning app), and then **User Management** > **Users**.
2. Click + **Add User**.
3. Enter the user's first and last name.
4. Enter the user's email address. The email address must be unique across all Pardot accounts.
5. To send an activation link to the user, select **Send Activation Email**. This email prompts the user to choose a password and security question. The activation email expires after 48 hours. Do not use this option if you want the user to be SSO-only.
6. Choose a user role.
7. When finished, click **Create User**.

EDITIONS

Available in: All Pardot Editions

USER PERMISSIONS

To create a user:

- Pardot Administrator role

Import Users

You can create or update up to 50 users at once by importing a .csv file.

Note: User import is not available in accounts with Salesforce User Sync enabled.

Before you begin, make sure that your import file meets these criteria.

- UTF-8 encoded to preserve special characters
- Contains a header row with First Name, Last Name, and Email Address headers, at minimum
- Smaller than 100 MB

These headers are accepted in import files.

- Email Address (required)
- First Name (required)
- Last Name (required)
- CRM Username
- Job Title
- Password Expires (Yes or No)
- Phone Number
- Role
- Tags
- URL

1. Open the Users page. Select **Admin** (**Pardot Settings** in the Lightning app), and then **User Management** > **Users**.
2. Click **Import Users**.
3. Click **Choose File**, and select the import file.
4. Click **Next**.

EDITIONS

Available in: All Pardot Editions

USER PERMISSIONS

To import users:

- Pardot Administrator role

5. Map the fields.
6. Select a time zone. This setting applies to all users that you are importing.
7. (Optional) If you have a Salesforce connector, you can enable single sign-on (SSO) for users. If you select this option, users are SSO-only and cannot log in to Pardot using their email and password.
8. When finished configuring the import, click **Next**.
9. Review your import, then click **Confirm & Save**.

When your import is finished, Pardot sends an email confirmation.

Integrate with Salesforce

The Salesforce-Pardot connector syncs prospect and opportunity data between Pardot and the Salesforce CRM. Pardot can sync with Salesforce Professional Edition accounts or higher.

Download the Salesforce-Pardot Connector Implementation Guide for instructions.

Set Up Salesforce Engage

EDITIONS

Available in: All editions with Salesforce Engage

If you've purchased Salesforce Engage, learn how to implement it and empower your sales team to sell smarter and faster than ever before.

See Set Up Salesforce Engage for instructions.

Set Up B2B Marketing Analytics

EDITIONS

Available in: **All editions with B2B Marketing Analytics**

B2B Marketing Analytics is an Einstein Analytics app containing Salesforce and Pardot data populated with your Salesforce connector. If you've purchased B2B Marketing Analytics, configure the tool after configuring your Salesforce connector.

See B2B Marketing Analytics for instructions.

Build Marketing Assets

Create marketing assets that align with your brand for lead generation, engagement, and tracking.

Before you get started, identify the marketing assets you want to create in Pardot.

Email templates—Pardot uses email templates for autoresponders, list emails, and engagement programs. Identify the email templates that you want to create in Pardot.

Forms—Pardot provides hosted forms, built using a form builder, and form handlers that are integrated with your existing website forms. Identify the forms you want to replace with Pardot-hosted forms or integrate with form handlers.

Landing pages—Pardot provides hosted landing pages that are easy to create using HTML or with a drag-and-drop builder. Identify landing pages to host in Pardot.

Email Unsubscribe and Email Preference Center pages—Create email unsubscribe and email preference center pages modeled after an existing page on your website.

Email Templates

Pardot email templates are reusable email designs that you can base new emails on. After you design and build a template, you can personalize an email for each recipient. You can also modify a template and limit what kind of changes your users can make.

EDITIONS

Available in: All Pardot Editions

Create an Email Template

Create text and HTML email designs and reuse them for engagement programs, autoresponders, one-to-one emails, and list emails.

EDITIONS

Available in: All Pardot Editions

USER PERMISSIONS

To create email templates:
- Pardot Administrator or Marketing role

1. Open the Email Templates page.
   - In Pardot, select **Marketing** > **Emails** > **Email Templates**.
   - In the Lightning app, select **Pardot Email**, and then **Email Templates**.
2. Click **+ Add Email Template**.
3. Enter a name. Prospects don't see the name—it's used in Pardot to organize assets.
4. Choose a folder.
5. Select a campaign.
6. Select the email type.
7. From **Available for**, select the kinds of emails the template can be used with.
8. Click **Save**.
9. Choose a layout to start your template and click **Apply**, or click **Skip** to design a template from scratch.

After you've set up your basic information, use the email editor to edit, test, and set up sending for your template. To make your template available for use, click **Publish to Template** when you're done designing it.

Capture Leads with Forms and Form Handlers

Pardot offers a few ways to collect visitor information and create identified prospects. Design and manage Pardot forms using the Form Wizard. Or, funnel data from external forms into Pardot with a form handler. Enhance your customer's journey by directing prospects to a form embedded on a custom landing page.

EDITIONS

Available in: All Pardot Editions

Pardot Forms Versus Form Handlers

Pardot forms and form handlers are different. Pardot forms are designed and managed completely in Pardot. Form handlers connect Pardot to your external forms so that you can funnel prospect information into Pardot. Review the features to determine which form type you want to use.

Create a Form

Pardot's Form wizard walks you through creating forms quickly and easily.

Create a Form Handler

Use a form handler to post data from third-party forms to Pardot.

Pardot Forms Versus Form Handlers

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Feature	Pardot Form	Form Handler
Prevents data duplication in Pardot	✓	✓
Validates email addresses	✓	✓
Provides progressive profiling	✓	
Protects against bots	✓	
Integrates with third-party forms		✓
Maintains current lead flow		✓
Integrates with Salesforce Web-to-Lead forms		✓
Supports custom front-end editing		✓
Provides form views and error data	✓	
Provides field-level change audits for prospects	✓	✓
Integrate with Pardot landing pages	✓	
Base automation rules on form views	✓	
Base automation rules on form completions	✓	✓
Sends Pardot autoresponder emails	✓	✓

Feature	Pardot Form	Form Handler
Redirects to a success page	✓	✓
Displays Pardot Thank You content after form submission	✓	

Create a Form

EDITIONS

Available in: All Pardot Editions

USER PERMISSIONS

To create a form:

- Pardot Administrator or Marketing role

Pardot's Form wizard walks you through creating forms quickly and easily.

1. Open the Forms page.
   - In Pardot, select **Marketing** > **Forms** > **Forms**.
   - In the Lightning app, select **Content**, and then **Forms**.
2. Step 1: Name
   a. Name the form.
   b. Select a folder.
   c. Select a campaign.
   d. Click **Next**.
3. Step 2: Fields
   a. To add new fields, click **+ Add New Field**.
   b. Use the tool icons to edit, rearrange, and delete fields.
   c. Click **Next**.
4. Step 3: Look and Feel
   a. Choose a layout template.
   b. Enter the text for the submit button.
   c. On the Above Form tab, enter the content that appears above your form fields.
   d. On the Below Form tab, enter the content that appears below your form fields.
   e. On the Styles tab, customize the look and feel of your form's elements.
   f. On the Advanced tab, configure how your form behaves, how it tracks prospect activities, and how it protects against spam bots.
   g. Click **Next**.
5. Step 4: Completion Actions
   a. On the Thank You Content tab, enter the content that displays after the prospect submits the form.
   b. On the Thank You Code tab, enter code that you want to run after form submission.
   c. Add completion actions.
   d. Click **Next**.
6. Confirm and save your form.

Create a Form Handler

EDITIONS

Available in: All Pardot Editions

USER PERMISSIONS

To create a form handler:

- Pardot Administrator or Marketing role

Use a form handler to post data from third-party forms to Pardot.

1. Open the Form Handlers page.
   - In Pardot, select **Marketing** > **Forms** > **Form Handlers**.
   - In the Lightning app, select **Content**, and then **Form Handlers**.
2. Click **+ Add Form Handler**.
3. Name the form handler.
4. Select a folder.
5. Select a campaign.
6. If the data from the form is forwarded to another service, enable data forwarding to success location.
7. From the Success Location dropdown, select **Specific URL** or **Referring URL**.

   Note: Select **Referring URL** if your form is on a page with content that you want the prospect to view again after submitting the form. Select **Specific URL** to redirect the prospect after form submission, or if you are forwarding the prospect's data to another database.

8. From the Error Location dropdown, select either **Referring URL** or **Specific URL** as the location where the visitor is redirected if the form has an error.
   a. If you select **Referring URL**, you cannot enter a specific error location.
   b. If you select **Specific URL**, enter the URL for the redirect location.
9. Add completion actions.
10. Add and map form fields. Repeat these steps for each field on your form.
    a. Click **+ Add New Field**.
    b. Enter `External Field Name`. The name is specified by the 'name=' attribute of the input tag in the HTML of your external form. External field name is case-sensitive.
    c. Select the prospect field.
    d. Save your changes.
11. Click **Create form handler**.

After you've created the form handler, integrate it with your form.

Engaging Visitors with Landing Pages

EDITIONS

Available in: All Pardot Editions

A landing page is a web page that a visitor reaches after clicking a link or advertisement. This page generally displays content that is specific to the advertisement, search keyword, or link clicked. Directing visitors to a landing page makes them more likely to convert, because they're presented tailored content. A landing page presents a streamlined path designed to elicit a specific action by the visitor.

Create Layout Templates for Landing Pages

Layout templates are used to format landing pages, forms, and site search results. Layout templates do not support server-side scripting languages.

Create a Landing Page Using a Layout Template

After you create a layout template, you can use it to style a landing page.

Create a Landing Page with a Stock Template

Create a landing page quickly with a preformatted stock template.

Create Layout Templates for Landing Pages

Layout templates are used to format landing pages, forms, and site search results. Layout templates do not support server-side scripting languages.

EDITIONS

Available in: All Pardot Editions

USER PERMISSIONS

To create a layout template:
- Pardot Administrator or Marketing role

1. Open the Layout Templates page.
   - In Pardot, select **Marketing** > **Landing Pages** > **Layout Templates**.
   - In the Lightning app, select **Content**, and then **Layout Templates**.
2. Click **+ Add Layout Template**.
3. Name the template.
4. Create or import styling using one of these methods.
   - On the Layout tab, add HTML and CSS. Don't remove the `%%title%%`, `%%content%%`, or `%%description%%` variable tags because they populate the content for your landing page.
   - Import styling from a website by choosing **From URL** from the Import Layout dropdown. Enter a URL and click **Import Now**. You must add the `%%title%%`, `%%content%%`, and `%%description%%` variable tags.
   - Choose a responsive template from the Import Layout dropdown, and click **Import Now**. Importing a template overwrites all code in the Layout tab.
5. (Optional) Edit the Form and Site Search tabs. The default code is best for most cases.
6. Save your layout template.

After you've created a layout template, use it to style landing pages.

Create a Landing Page Using a Layout Template

After you create a layout template, you can use it to style a landing page.

USER PERMISSIONS

To create a landing page:
- Pardot Administrator or Marketing role

1. Open the Landing Pages page.
   - In Pardot, select **Marketing** > **Landing Pages** > **Landing Pages**.
   - In the Lightning app, select **Content**, and then **Landing Pages**.
2. Click **+ Add Landing Page**.
3. Step 1: Name
   a. Name the landing page.
   b. Enter a title. The title is displayed in the browser's title bar when the page is viewed.
   c. Enter a description. This content is used for SEO in the <meta> description of your landing page.

d. Choose a Pardot campaign.

e. (Optional). To prevent the landing page from appearing in search engine results, select **Hide from search engine indexing**.

f. Click **Next**.

4. Step 2: Select Form

a. Select a form option.

b. (Optional). Select **Redirect the prospect instead of showing the form's Thank You Content**, and enter a redirect URL. This option redirects the prospect instead of displaying thank you content.

c. Click **Next**.

5. Step 3: Content Layout

a. Choose a layout template.

b. Click **Next**.

6. Step 4: Landing Page Content

a. Use the editor to add content. This content populates the %%content%% tag in the layout template.

b. When finished, click **Next**.

7. Confirm and save your landing page.

The landing page's link is available on the read screen or by clicking **View Online**.

Create a Landing Page with a Stock Template

Create a landing page quickly with a preformatted stock template.

USER PERMISSIONS

To create a landing page:
- Pardot Administrator or Marketing role

Note: When you place a Pardot form in a landing page, the form's layout template isn't displayed on the landing page. Use a layout template instead, or copy your form's layout CSS and paste it into the script handler in Page Options.

Note: Stock templates are not responsive. If you need a responsive template, use a layout template instead.

1. Open the Landing Pages page.
   - In Pardot, select **Marketing** > **Landing Pages** > **Landing Pages**.
   - In the Lightning app, select **Content**, and then **Landing Pages**.
2. Click **+ Add Landing Page**.
3. Step 1: Name

a. Name the landing page.

b. Enter a title. The title is displayed in the browser's title bar when the page is viewed.

c. Enter a description. This content is used for SEO in the <meta> description of your landing page.

d. Choose a Pardot campaign.

e. (Optional) Set an archive date. Archiving a landing page makes the page inactive, but the content displays when a prospect accesses the landing page URL after the archive date.

f. (Optional) To prevent the landing page from appearing in search engine results, select **Hide from search engine indexing**.

   g. Click **Next**.

4. Step 2: Select Form
   a. Select a form option.
   b. (Optional). Select **Redirect the prospect instead of showing the form's Thank You Content**, and enter a redirect URL. This option redirects the prospect instead of displaying thank you content.
   c. Click **Next**.
5. Step 3: Content Layout
   a. Click **Stock Templates**.
   b. Select a stock template.
6. Step 4: Landing Page Content
   a. Use the editor to add content. Add scripts and control page defaults by clicking **Page Options**.
   b. When finished, click **Next**.
7. Confirm and save your landing page.

The landing page's link is available on the read screen or by clicking **View Online**.

Use Pardot to Host Files

Pardot can host content such as white papers and data sheets. When a prospect downloads a Pardot-hosted file, the file appears in the prospect's activities. You can run automation rules based on those activities. Pardot can also host image content to use in email templates and landing pages.

Pardot File Hosting

EDITIONS

Available in: All Pardot Editions

You can upload images and other files to use in your Pardot emails, forms, and landing pages. Pardot-hosted files have tracked URLs based on your tracker domain, so when prospects access a non-image file, it's reflected in their activities.

Important: All Pardot-hosted files are publicly available at the assigned URL. Don't upload sensitive information.

Keep these considerations in mind when using Pardot to host files.

- Files can be up to 50 MB.
- To update a file and keep the same URL, edit the file and upload the new version using the same name as the original file.
- If you update a file's content using a new file name, the URL changes to use the new file name. The old file URL points to the new content file.
- Content files are hidden from search engine indexing.
- When you delete a file, it's deleted permanently and can't be recovered.

Supported File Types

Pardot can host these content file types.

- All image file formats (for example, .jpg, jpeg, .png, .gif, .svg)

- All audio file formats (for example, .mp3, .wav)
- All video file formats (for example, .mp4, .mov, .avi)
- JavaScript and CSS (for example, .js, .css)
- ZIP files (.zip)
- Microsoft Office file formats (for example, .doc, .docx, .xls, .xlsx, .ppt, .pptx)
- Calendar invite files (.ics)
- PDF (.pdf)
- Font files (for example, .woff, .ttf)

Upload Files to Pardot

You can add individual or multiple files to Pardot to use as marketing assets or to track file downloads.

EDITIONS

Available in: All Pardot Editions

USER PERMISSIONS

To upload files:

- Pardot Administrator or Marketing role

Important: All Pardot-hosted files are publicly available at the assigned URL. Don't upload sensitive information.

1. Open the Files page.
   - In Pardot, select **Marketing** > **Content** > **Files**.
   - In the Lightning app, select **Content**, and then **Files**.
2. Upload your files.

   Note: To add a vanity URL, campaign, or completion actions, upload files individually. Otherwise, you have to manually add these to the bulk-uploaded files later.

   - To upload multiple files at once, drag them to the upload box, or click **+ Upload Files** and select your files. Pardot doesn't unzip compressed folders.
   - To upload a single file, click **+ Add File**.
3. Follow the on-screen prompts to finish your upload.

Segment Prospects

You can send to or omit prospects from Pardot list emails and engagement programs. Create lists manually, import lists via .csv, or create them dynamically using rules. Lists can be public, so prospects can manage their subscriptions from an email preference page, or private for internal use only. Lists can also be visible in the CRM so that users can add and remove prospects from the CRM.

Static and Dynamic Prospect Lists

A static list consists of prospects that you build once and edit manually to make changes. A dynamic list is rule-based and automatically updates when a prospect's data changes.

Create a Static List

A list is a group of prospects that you can use to send list emails or to feed engagement programs. To add prospects to a static list, you can add them manually or use automations.

Considerations for Using Dynamic Lists

When using dynamic lists, keep these considerations in mind.

Create a Dynamic List

A rule-based dynamic list automatically adds prospects when they match the criteria and removes them when they don't.

Static and Dynamic Prospect Lists

A static list consists of prospects that you build once and edit manually to make changes. A dynamic list is rule-based and automatically updates when a prospect's data changes.

You can use either list as a recipient list or suppression list for list emails and engagement programs. The benefit of a dynamic list is that it's created based on criteria and updates as prospects meet or fail to meet the criteria. A dynamic list is most helpful when you're creating a list based on prospect data that changes often.

Use a static list when you have no reason to remove prospects, such as a list of all prospects who complete your Contact Us form. You can create this type of list with an automation rule. Prospects who complete the form match the rule once and are added to the list.

You can add prospects to and remove them from a static list but not with a dynamic list. Instead, a dynamic list refreshes constantly, adding prospects who match the criteria and removing prospects who don't.

You can't convert a static list to a dynamic list.

Create a Static List

A list is a group of prospects that you can use to send list emails or to feed engagement programs. To add prospects to a static list, you can add them manually or use automations.

Note: If you want to create a dynamic list, see Create a Dynamic List.

1. Open the Lists page.
   - In Pardot, select **Marketing** > **Segmentation** > **Lists**.
   - In the Lightning app, select **Prospects**, and then **Segmentation** > **Segmentation Lists**.
2. Click **+ Add List**.
3. Name the list.
4. Leave **Dynamic List** unselected.
5. Select other options as needed.
   - To use the list for internal testing, select **Email Test List**.
   - To remove the list from tables and picklists but continue using it for automation, pick an Archive Date.
   - To make the list available in the Email Preference Center, select **Public List**.
   - To allow users to make list edits from Salesforce, select **CRM Visible**.
6. When finished, click **Create List**.

After you've created a list, you can add prospects to it.

EDITIONS

Available in: All Pardot Editions

USER PERMISSIONS

To create a list:
- Pardot Administrator or Marketing role

Considerations for Using Dynamic Lists

When using dynamic lists, keep these considerations in mind.

- If you use a dynamic list as a recipient list in a scheduled email send, the email is sent to all prospects on the list when the email is sent.
- You can mark a dynamic list as public and display it on your email preference center, so prospects can opt out of the list. Only the prospects who meet the list's criteria can see the list on the email preference page.

EDITIONS

Available in: All Pardot Editions

- If you split a dynamic list, the resulting lists are static, but the original dynamic list isn't changed. You can't convert a static list to a dynamic list. Prospects are no longer automatically added to the split lists.
- When using the account or opportunity rule criteria, the dynamic list matches only those prospects that have an associated opportunity or account. Prospects without an opportunity or account don't match the list.

Create a Dynamic List

EDITIONS

Available in: All Pardot Editions

USER PERMISSIONS

A rule-based dynamic list automatically adds prospects when they match the criteria and removes them when they don't.

1. Open the Lists page.
    - In Pardot, select **Marketing** > **Segmentation** > **Lists**.
    - In the Lightning app, select **Prospects**, and then **Segmentation** > **Segmentation Lists**.
2. Click **+ Add List**.
3. Name the list.
4. Select other options as needed.
    - To use the list for internal testing, select **Email Test List**.
    - To remove the list from tables and picklists but continue using it for automation, pick an Archive Date.
    - To make the list available in the Email Preference Center, select **Public List**.
    - To allow users to make list edits from Salesforce, select **CRM Visible**.
5. Select **Dynamic List**.
6. Click **Set Rules**.
7. Select a match type.
    - **Match All**—Prospect must meet all criteria to match.
    - **Match Any**—Prospect must meet at least one rule to match.
8. To add individual criteria, click **+ Add new rule**. To add sets of criteria, click **+ Add new rule group**.

    Note: Separate criteria with a semicolon (;). The text field has a limit of 255 characters.

9. To confirm that your dynamic list populates as expected, click **Preview**.
10. When you're ready to populate the list, click **Run Rules**.

Set Up Automation Tools

Pardot's automation tools streamline marketing efforts by automating tasks. Use automation tools to perform actions on prospects, build prospect lists based on criteria, and react to prospect actions.

Choose the appropriate automation tool for your needs. For information about each automation tool, see Streamline Marketing Efforts with Automation Tools.

Automation rules are repeatable, criteria-based rules that find matching prospects and apply actions to them.

You can use segmentation rules to create a list of prospects and apply a segmentation action based on specific criteria. Unlike automation rules, segmentation rules don't run continuously. Segmentation rules run once and match only the prospects that meet the rule's criteria when the rule runs.

Completion actions are a great way to automate some actions from a marketing element. For example, you can use a completion action to add prospects to a list when they complete a form. Completion actions are available on forms, form handlers, files, custom redirects, emails, and page actions.

Page actions are completion actions that are triggered by a prospect's page views. You can apply page actions to any page that contains your Pardot tracking code.

Create an Automation Rule

Create an automation rule to perform criteria-based actions on prospects.

EDITIONS

Available in: All Pardot Editions

USER PERMISSIONS

To create an automation rule:

- Pardot Administrator or Marketing role

1. Open the Automation page.
   - In Pardot, select **Marketing** > **Automation** > **Automation Rules**.
   - In the Lightning app, select **Pardot Settings**, and then **Automation Settings** > **Automation Rules**.
2. Click **+ Add Automation Rule**.
3. Name the rule.
4. (Optional) Select **Repeat Rule**. This option controls how many times the rule can match a prospect. If the rule is set to repeat, you can't change this setting after you resume.
5. Select a match type.
   - **Match All**—Prospect must meet all criteria to match.
   - **Match Any**—Prospect must meet at least one rule to match.
6. In the Rules section, to add individual criteria, click **+ Add new rule**. To add sets of criteria, click **+ Add new rule group**.

   Note: Separate criteria with a semicolon (;). The text field has a limit of 255 characters.
7. In the Actions section, click **+ Add new action**, and select at least one action to apply when a prospect meets the criteria.
8. When finished, click **Create automation rules**.

The rule is saved in paused mode, and you can still edit it. Follow the instructions in Pardot to preview the rule's matches. Confirm that your rule works as expected, and click **Resume automation rules**.

Create a Segmentation Rule

Create a segmentation rule to run a one-time segmentation action on prospects that meet your criteria.

EDITIONS

Available in: All Pardot Editions

USER PERMISSIONS

to create a segmentation rule:

- Pardot Administrator or Marketing role

1. Open the Segmentation Rules page.
   - In Pardot, select **Marketing** > **Segmentation** > **Rules**.
   - In the Lightning app, select **Prospects**, and then **Segmentation** > **Rules**.
2. Click **+ Add Segmentation Rule**.
3. Name the rule.
4. Select a match type.
   - **Match All**—Prospect must meet all criteria to match.
   - **Match Any**—Prospect must meet at least one rule to match.
5. In the Rules section, to add individual criteria, click **+ Add new rule**. To add sets of criteria, click **+ Add new rule group**.

   Note: Separate criteria with a semicolon (;). The text field has a limit of 255 characters.

6. To confirm that your rule runs as expected, click **Preview**.
7. When you're ready to run the rule, click **Run Segmentation**.

Completion Actions

Completion actions are a great way to automate some actions from a marketing element. For example, you can use a completion action to add prospects to a list when they complete a form. Completion actions are available on forms, form handlers, files, custom redirects, emails, and page actions.

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Keep these considerations in mind when using completion actions.

- Completion actions are not retroactive. They apply only to activities that happen after the completion action is added.
- Most completion actions execute every time they are triggered. However, completion actions based on email link clicks only execute once per prospect.
- Adjust Score and Send Autoresponder Email actions are throttled.
- Completion actions execute only for prospects and don't affect visitors.
- Completion actions don't execute on image file downloads.
- Completion actions don't execute on filtered activities.
- Completion actions based on link clicks don't trigger on unsubscribe links or email preference page clicks.
- If you have multiple completion actions on a marketing asset, the actions that affect other automations run first. Next, the automation runs, then the rest of the completion actions run.

  For example, a form has these actions: assign to user, notify user, set custom field. Pardot assigns the prospect to the user first, then sets the custom field value, runs any real-time related automations, and then notifies the user.

Create a Page Action

Create page actions that apply a completion action based on prospect page views.

1. Navigate to **Marketing** > **Automation** > **Page Actions**.
2. Click **+ Add Page Action**.
3. Name the page action.
4. Enter the full URL of the page. It must be a valid URL or a wildcard, and the page must contain Pardot tracking code.

   Note: To use a wildcard, you must place it at the end of the URL. www.example.com/products/*?src=mypage doesn't work, but www.example.com/products/* does.

5. (Optional) Change the page's score.
6. (Optional) Choose a scoring category.
7. (Optional) Select **Priority Page**.
8. Add completion actions.
9. When finished, click **Create page action**.

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To create page actions:

- Pardot Administrator or Marketing role

Automating Prospect Assignments

Use Pardot's automation tools to automate prospect assignment based on a prospect's information and actions.

Automation Rules

An automation rule assigns your prospects based on complex criteria. The rule only assigns prospects who aren't assigned at the time they match the rule' s criteria.

Example: A prospect has a score of at least 100, has VP or Vice in the job title, and is located in Georgia, Tennessee, or Alabama. Based on matching criteria, the prospect is assigned to the Southeast regional sales representative.

Example: A prospect has a score of at least 100 and a grade higher than a B, and has downloaded one of three white papers. Based on matching this criteria, the prospect is assigned to the Inside Sales group.

Completion Actions

A completion action assigns prospects based on a successful form submission, specific page view, file download, or a custom redirect click. Completion actions don't reassign prospects who already have an owner.

To assign based on a combination of criteria (for example, a mix of form submissions and custom redirect clicks), use an automation rule instead.

Example: A prospect submits a form to request a free trial. Based on this interest, the prospect is immediately assigned to a sales group.

Engagement Program Actions

An engagement program action assigns prospects based on how they respond to your program.

Example: A prospect in a 30-day nurturing program clicks a link to request a trial. Use an assign to user step to assign the prospect to a sales rep.

Add Connectors

Add connectors to sync Pardot with third-party applications, like webinar services and Google AdWords. Data is passed back and forth between the two applications. With a connector, you can manage formerly disparate marketing channels from Pardot.

See Extending Pardot with Connected Apps for more information.

Pardot Success Resources

The Pardot Customer Hub is the one-stop shop for links to help, learning, and collaboration resources.

Visit the Pardot Customer Hub to get the most out of Pardot.