Account Engagement Lightning App Implementation Guide

Salesforce, Spring '24

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PARDOT LIGHTNING APP IMPLEMENTATION GUIDE

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Requirements for the Account Engagement Lightning App

Review requirements and prepare your Salesforce org before you enable the Account Engagement Lightning App.

General

To enable the Account Engagement Lightning App, your org must meet these requirements.

- Lightning Experience is enabled in Salesforce.
- Account Engagement includes a verified Salesforce connector.
  - If your business unit was created before February 12, 2019, see Salesforce Connector Implementation Guide (PDF) for help.
  - If your business unit was created after February 12, 2019, see Salesforce Connector v2 Implementation Guide (PDF) for help.
  - If you manage multiple business units, see Multiple Business Units Implementation Guide (PDF) for help.

User Access

To access the Account Engagement Lightning App, users must have a Salesforce or Identity license. Other licenses, such as Salesforce Platform and Salesforce Platform One, don't provide the right access.
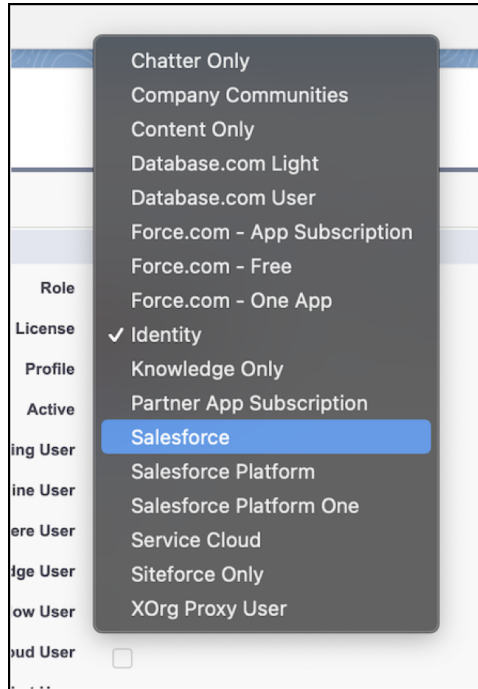
Sales or Identity licensed users also need one of the following permission sets:

- Account Engagement User—Grants access to the app only. Doesn't include full access to campaigns. Available for all Account Engagement editions purchased or upgraded after February 12, 2019.
- Sales Cloud User, Service Cloud User, or CRM User—Grants full Salesforce access, including the Account Engagement Lightning App. Available for all Account Engagement editions.

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Authorization and Sharing Basics

Authorization is a user's ability to read, create, update, or delete an object. Sharing is a user's ability to view, update, or delete a record.

Salesforce has another level in its sharing model—field level security. Field permissions control whether a user can see, edit, and delete the value for a particular field on an object.

Security Type	How It's Controlled in Salesforce	How It's Controlled in Account Engagement
Authorization	Profiles and permission sets	User roles
Sharing	Organization-wide sharing settings, role hierarchy, sharing rules, manual sharing .	Groups and folders
Field Security	Field level security	None

Salesforce uses a layered data sharing design that allows you to expose different data sets to different users. This sharing model lets users do their jobs without seeing data they aren't supposed to see. There are many ways to control data visibility.

In Account Engagement, access to data is controlled by user roles, groups, and folder permissions. User roles define which features and data a user can access. Folder permissions give folder access to specific user groups. Folders can't be used to limit user access to prospects because prospects can't be put in folders.

Note: When an Account Engagement user is connected to a Salesforce user, their permissions in Salesforce control what data they see in Salesforce.

Visibility Conflicts

When an Account Engagement user has Salesforce permissions that are more restrictive than the connector user, they can view Salesforce data in Account Engagement that they don't have permission to view in Salesforce. This situation is called a visibility conflict.

Example: Pat is a Salesforce user who doesn't have permission to view Salesforce campaigns. His Salesforce user is synced to an Account Engagement user. Pat works on an engagement program and creates a step that adds a prospect to a Salesforce campaign. Pat sees all synced Salesforce campaigns in the dropdown, and can choose any for the step. Because the connector user has permission to view and edit campaigns in Salesforce, Pat also has access to view and edit Salesforce campaigns.

To minimize visibility conflicts, we recommend the following steps.

- Decide what kind of visibility you want your users to have, and document those requirements.
- Have your system admins collaborate so that each system is configured to meet your requirements.
- Limit the number of users whose Salesforce access is less than the connector user.
- When in doubt, contact Salesforce Customer Support for guidance.

Give Users Access to the Account Engagement Lightning App

An admin must enable the Account Engagement Lightning App, and then the required permission to users.

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

Before you start this task:

- Enable Account Engagement.
- Verify that your Account Engagement and Salesforce users are linked. We strongly recommend using Salesforce User Sync.

EDITIONS

Available in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions with any Account Engagement Edition
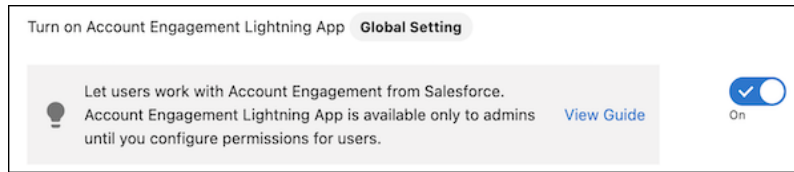
USER PERMISSIONS

To enable the Account Engagement Lightning app:
- Customize Application

To edit app permissions:
- Manage Profiles and Permission Sets

1. Give users access to the B2BMA Canvas connected app.

   a. From Salesforce Setup, in the Quick Find box, enter `Connected`, and then select **Manage Connected Apps**.

   b. Select **b2bma_canvas**.

   c. Click **Manage Profiles** or **Manage Permission Sets** to assign the connected app to users who need access.

2. Assign the Account Engagement User, Sales Cloud User, Service Cloud User, or CRM User permission set.

   a. From Marketing Setup, in the Quick Find box, enter `Permission Sets`, then select **Account Engagement User**, **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.

   > 📝 Note: If you'd rather use a custom permission set, create and assign one with the **Allow access to all Pardot features** app permission. For maximum flexibility, don't choose a license for the new permission set. To access the Lightning App, users still need the Account Engagement User, Sales Cloud User, Service Cloud User, or CRM User permission set license.

3. Make the 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 Account Engagement 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.

Guidelines for Using the Account Engagement Lightning App

Keep these guidelines in mind when using Account Engagement in Lightning Experience.

- Navigation is slightly different than standalone Account Engagement.
- Tabs for Engagement Studio and Account Engagement Campaigns aren't displayed by default. Users can add these tabs themselves, or a Salesforce admin can add them for all users.
- To use the app in Safari, disable the Prevent cross-site tracking preference, which blocks access from Lightning Experience.
- Links to Account Engagement in system emails point to the standalone app, not the corresponding screen in the Lightning app.
- You can add, remove, and reorder tabs, but you can't edit sidebar items.

Troubleshooting Common Account Engagement Lightning App Problems

Find out how to solve the most common problems with Account Engagement Lightning app enablement.

You don't see the b2bma_canvas connected app

Confirm that you're enabling the app in a production environment. The Account Engagement Lightning app isn't available in developer or trial orgs. If you still don't see the app, contact your Salesforce Account Executive.

Users get an error: "You don't have permission to view application within namespace [b2bma] and API name [b2bma_canvas]"

Give users access to the connected app.

When users open the app, it doesn't load

Make sure that your Salesforce connector is verified and that you have connected your users.

Users don't see the app in the App Launcher

Make sure that Account Engagement Lightning app is enabled. Then, make sure that your users have the CRM User, Sales Cloud User, or Service Cloud User permission set.