# Account Engagement User Migration Admin Guide

Salesforce, Spring '24


@salesforcedocs

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# INTRODUCTION

After February 15, 2021, all users are required to use Salesforce single sign-on (SSO) to access Account Engagement. If you missed the February 15 deadline and have Account Engagement-only users who can't log in, set up SSO so they can regain access. This guide walks you through each step of the process.

**Important:** If you don't have an admin who can access Account Engagement with SSO and you're locked out, Salesforce Customer Support.

Before you begin, make sure that you review these resources:

- User Migration Overview
- User Migration FAQ

## Process Overview

Here's a high-level overview of everything you must do to regain access for your users.

- Inventory your current Account Engagement-only users.
- Map Account Engagement-only users to Salesforce users.
- Enable Salesforce SSO for all users.
- Update API integrations (if applicable).
- Update your WordPress plugin (if applicable).

## About Salesforce Identity Licenses

To ensure your users have access the latest Account Engagement functionality, we recommend a full CRM license for all Salesforce users. However, we understand this may not be possible for everyone, so your Salesforce org is now bundled with 100 Identity licenses at no additional cost. These licenses are available to you immediately and can be used to create new Salesforce users who you can then assign to Account Engagement.

Identity licenses let users log in with Salesforce and access Account Engagement. Identity-licensed users don't have access to the Account Engagement Lightning app or features that rely on Salesforce, such as Connected Campaigns, Engagement History dashboards, or lead and contact records.

# USER MIGRATION PLANNING WORKSHEET

Here's everything you must do to regain access for your Account Engagement users, plus a couple recommendations. Depending on the size and structure of your org, it's possible you need more than one admin to assist with this process. You can print or save this worksheet to help you plan and track progress on each task.

| Task | Owner | Completion Status | Notes |
|---|---|---|---|
| Upgrade to v2 of the Salesforce connector (recommended) | | | |
| Inventory Account Engagement-only users | | | |
| Create new Salesforce users (if needed) | | | |
| Map all Account Engagement users to a Salesforce user and verify that user mappings are correct | | | |
| Enable Salesforce SSO for all users | | | |
| Enable Salesforce User Sync (recommended) | | | |
| Update API integrations to use Salesforce SSO (if applicable) | | | |
| Update WordPress plugin (if applicable) | | | |
| Confirm users can access Account Engagement | | | |

# UPGRADE YOUR SALESFORCE CONNECTOR

To take advantage of improvements like on-demand metadata sync, Business Unit Switcher, and the Account Engagement integration user, upgrade to v2 of the Salesforce connector. This step is not required for user migration, but we strongly recommend you consider upgrading to get the most out of Account Engagement. If you haven't connected Account Engagement and Salesforce, set up the connector now.

SEE ALSO:

Setting Up a Salesforce Connector for Business Units Purchased After February 11, 2019

Setting Up the Salesforce Connector for Business Units Purchased Before February 11, 2019

## Upgrade to v2 of the Salesforce Connector

EDITIONS

Available in: All Account Engagement Editions

USER PERMISSIONS

To upgrade the Salesforce connector

- Account Engagement Administrator role

Upgrading to v2 of the Salesforce connector is easy and helps you get the most out of Account Engagement.

Note: Upgrading the connector makes permanent changes to your account. Carefully read the considerations before starting the upgrade process.

1. Open the Connectors page.
    - In Account Engagement, select **Admin** and then select **Connectors**.
    - In the Lightning app, select **Account Engagement Settings** and then **Connectors**.
2. Click the icon next to the Salesforce connector, and then select **Upgrade**.
3. Acknowledge the change to your account and certify that you've reviewed the considerations for upgrading.
4. Click **Next**.
5. Select a connector user, then click **Choose User**.
6. Review your selections, then click **Upgrade Now**. If you select the integration user in Step 3, you must log into Salesforce to complete the upgrade.

A confirmation email is sent when the upgrade is complete.

SEE ALSO:

Considerations for Upgrading to v2 of the Salesforce Connector

# INVENTORY ACCOUNT ENGAGEMENT-ONLY USERS

Before you make any changes, inventory your Account Engagement-only users so you know who needs access but doesn't have it. Make sure each user has the correct role and permissions in Account Engagement.

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.

Filter your users in Account Engagement to see a list of Account Engagement-only users. If needed, you can also create a .csv export to work from.

EDITIONS

Available in: All Account Engagement Editions

USER PERMISSIONS

To manage Account Engagement users
- Account Engagement Administrator role

1. Open the Users page. Select **Admin** (**Account Engagement Settings** in the Lightning app), and then **User Management** > **Users**.
2. Click the View dropdown menu and select **Pardot-only Users** to view the users you must map to Salesforce users.
3. To create an export to work from, click **Tools**, and then select **CSV Export**. You receive an email when each export is complete. Exports are available for download on the Exports page in your Account Engagement settings.

If you have Account Engagement-only users that you know are inactive or not needed, you can delete them. To delete a user, click and select **Delete**.

# PREPARE USER RECORDS IN PARDOT AND SALESFORCE

Identify or create a Salesforce user to associate to each of your Account Engagement-only users.

To ensure your users have access the latest Account Engagement functionality, we recommend a full CRM license for all Salesforce users. However, we understand this may not be possible for everyone, so your Salesforce org is now bundled with 100 Identity licenses at no additional cost. These licenses are available to you immediately and can be used to create new Salesforce users who you can then assign to Account Engagement.

Note: Make sure you're familiar with the guidelines for adding users in Salesforce.

Add a Single User
Depending on how many Account Engagement-only users you have, you can add new Salesforce users one at a time.

Add Multiple Users
You can quickly add up to 10 users at a time to your organization. Your Salesforce edition determines the maximum number of users that you can add.

SEE ALSO:

Guidelines for Adding Users

## Add a Single User

Depending on how many Account Engagement-only users you have, you can add new Salesforce users one at a time.

Note: Email and username are required fields. An email can be reused across orgs but the username must be unique. The username must be formatted as an email address but it doesn't need to be a real or active email.

1. From Marketing Setup, enter `Users` in the Quick Find box, then select **Users**.
2. Click **New User** and fill out the required fields. For User License, you can use one of the 100 Salesforce Identity licenses bundled with your Account Engagement business unit.
3. To email the user their login name and a temporary password, select **Generate new password and notify user immediately**.
4. When you're done, click **Save** or **Save & New** to create another Salesforce user.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To create users:
- Manage Internal Users

# Add Multiple Users

You can quickly add up to 10 users at a time to your organization. Your Salesforce edition determines the maximum number of users that you can add.

1. From Setup, enter `Users` in the `Quick Find` box, then select **Users**.
2. Click **Add Multiple Users**.
3. If multiple user license types are available in your organization, select the user license to associate with the users you plan to create. The user license determines the available profiles.
4. Specify the information for each user.
5. To email a login name and temporary password to each new user, select **Generate passwords and notify user via email**.
6. Click **Save**.
7. To specify more details for the users that you've created with this method, edit individual users as needed.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To create users:

- Manage Internal Users

# MAP USERS AND ENABLE SALESFORCE SINGLE SIGN-ON

Map Account Engagement-only users to the correct users in Salesforce, and then enable Salesforce single sign-on (SSO). The process for completing these steps depends on whether you have Salesforce User Sync enabled in Account Engagement.

EDITIONS

Available in: All Account Engagement Editions

Setup for Business Units with User Sync

If you have Salesforce User Sync enabled, map your Account Engagement-only users to the correct Salesforce user. After you map your users, Salesforce User Sync will automatically convert them to single sign-on (SSO).

Setup for Accounts Without User Sync

If Salesforce User Sync isn't enabled in your Account Engagement business unit, you can create a .csv file of your Salesforce users and import it to Account Engagement. As part of the import process, map your Salesforce users to the correct Account Engagement users and enable Salesforce single sign-on (SSO).

## Setup for Business Units with User Sync

If you have Salesforce User Sync enabled, map your Account Engagement-only users to the correct Salesforce user. After you map your users, Salesforce User Sync will automatically convert them to single sign-on (SSO).

Note: After users are converted to SSO, they can no longer log in with their Account Engagement credentials. Notify your Account Engagement-only users about this change before you begin mapping users.

Map Salesforce and Account Engagement Usernames

If you have existing Account Engagement users, map them to their user record in Salesforce before you proceed with Salesforce User Sync. If users aren't mapped, the system ignores those users and they don't sync. For business units without User Sync, map users and then enable Salesforce Single Sign-on (SSO). Salesforce credentials are required to access Account Engagement.

SEE ALSO:

User Sync Basics

## Map Salesforce and Account Engagement Usernames

If you have existing Account Engagement users, map them to their user record in Salesforce before you proceed with Salesforce User Sync. If users aren't mapped, the system ignores those users and they don't sync. For business units without User Sync, map users and then enable Salesforce Single Sign-on (SSO). Salesforce credentials are required to access Account Engagement.

1. Open the user record that you want to work with.
2. From the CRM Username dropdown, select the user's Salesforce username.
3. Save the user.
4. Click **verify now** in the CRM Username row of the user record.

Repeat these steps for each user you want to map.

# Setup for Accounts Without User Sync

If Salesforce User Sync isn't enabled in your Account Engagement business unit, you can create a .csv file of your Salesforce users and import it to Account Engagement. As part of the import process, map your Salesforce users to the correct Account Engagement users and enable Salesforce single sign-on (SSO).

## Requirements for User Migration

Before you use the import tool to map users and enable Salesforce SSO, keep these requirements in mind:

- Prepare your .csv file for import before you begin. Include a CRM Username header and list the usernames for your Salesforce users so you can map them to your users in Account Engagement.
- Enable Salesforce SSO for the users in your import.



## Import Users

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

EDITIONS

Available in: All Account Engagement Editions

USER PERMISSIONS

To import users:
- Account Engagement Administrator role

Note: User import isn't available in business units that use Salesforce User Sync.

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 (required)
- Job Title
- Password Expires (Yes or No)
- Phone Number
- Role
- Tags
- URL

1. Open the Users page. Select **Admin** (**Account Engagement 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**.
5. Map the fields.

6. Select a time zone. This setting applies to all users that you're importing.
7. Verify that single-sign on is selected.
8. When finished configuring the import, click **Next**.
9. Review your import, then click **Confirm & Save**.

When your import is finished, you receive an email confirmation.

# UPDATE API INTEGRATIONS

If you use API integrations, update them to authenticate to Salesforce SSO instead of Account Engagement's authentication system.

Work with your developer to update API integrations to authenticate through Salesforce as soon as possible.

Account Engagement has contacted these third-party API integration partners.

- Drift
- FeedOtter
- On24
- TaxiForEmail
- Tray.io
- Qualified
- Zapier
- Zoom

If you use a third-party service that isn't on this list, contact them about updating their Account Engagement API integration.

SEE ALSO:

*Developer Docs*: Pardot API Documentation

# UPDATE THE WORDPRESS PLUGIN

To help prepare for this change, the WordPress plugin has been updated to authenticate via Salesforce SSO. If you use the WordPress plugin, you must update it to the new version

EDITIONS

Available in: All Account Engagement Editions

## Install the Pardot WordPress Plug-In

To connect to WordPress, you need API access and a Wordpress.org admin who can install the plug-in.

EDITIONS

Available in: All Account Engagement Editions

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

Before you start, create a connected application for the plug-in in Salesforce. Save the consumer key and secret field values that are provided during setup. See Configure Basic Connected App Settings.

1. Download the Pardot WordPress plug-in.
2. Choose a method for adding the plug-in to your site.

   In the WordPress admin area, click **Plugins** and then click **Add New**. Search for Pardot. Then, upload pardot-for-wordpress to your `/wp-content/plugins` directory.
3. Activate the plug-in.
4. In the WordPress admin area, navigate to Settings and click **Pardot Settings**.
5. Enter your business unit ID and the consumer key and secret that you saved when you set up the connected app.
6. Click **Authenticate with Salesforce** and enter your Salesforce username and password.
7. Select a campaign.
8. Save your settings.

# NEXT STEPS

When you're done with all the tasks outlined in this guide, there are a few follow-up items to consider.

## Communicate Changes to Your Account Engagement Users

Contact your Account Engagement-only users to confirm that they can log in with their Salesforce single sign-on (SSO) credentials.

## Make Plans for Training Environments

Account Engagement training environments use Account Engagement-only authentication. If you have an active training environment that you want to continue to use, follow this guide so users who need access can log in with Salesforce SSO. If you're locked out of your training environment, contact Salesforce Customer Support.

If you're an Account Engagement Plus, Advanced or Premium customer, use Sandboxes for Account Engagement for your testing needs.

## Enable Salesforce User Sync

Salesforce User Sync lets you create and manage your Account Engagement users in Salesforce. If you don't use Salesforce User Sync to manage users in Salesforce, consider setting it up now. After you map your users, the process to set up Salesforce User Sync is simple.

SEE ALSO:

Create a Sandbox for Account Engagement