Multiple Business Units Implementation Guide

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GETTING STARTED WITH MULTIPLE ACCOUNT ENGAGEMENT BUSINESS UNITS

Your enterprise marketing goals are based on variety of criteria, such as geography and product lines. Using multiple Account Engagement business units can help each division within your company focus on their unique marketing needs. Prospects and marketing assets are separated by business unit, so your divisions can market independently.

Using multiple business units can help you tailor and report on the effectiveness of your marketing.

- Use Marketing Data Sharing to control which records sync between Account Engagement and Salesforce.
- Provision new business units from Salesforce using the Account Engagement Setup Assistant.
- Get a unified view of your business units with B2B Marketing Analytics.

This guide walks you through implementing business units.

Business Unit Basics

Before you get started with multiple business units, learn how they work and interact with your data.

Business Unit Switcher

Some users, such as Account Engagement admins and marketing managers, can switch between business units to manage assets, records, and settings.

Implementation Planning Worksheet

To make your Account Engagement implementation as efficient as possible, print and use this worksheet to decide how to handle each task for your implementation. Engage with stakeholders from across your business, such as the admin in charge of reporting, marketing directors, and sales leadership.

Business Unit Basics

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Architecture Basics

When you set up multiple business units, they connect to a single Salesforce org, but remain their own partitioned Account Engagement database. Business units don't have a hierarchical relationship. To see a global view of your data, combine datasets from each business unit in B2B Marketing Analytics.

Each business unit has its own:

- Salesforce connector
- Prospects
- Marketing assets*
- Segmentations and automations
- Settings and configurations

*Assets created in a Lightning Builder can be shared across business units.

Considerations for Setting Up Business Units

Before you set up multiple business units, review these considerations.

Partner Assistance—The setup process is simple. However, configuration choices can have a widespread impact. The most successful implementations are done with the guidance of an Account Engagement and Sales Cloud certified partner. To get help finding a partner to work with, contact the Account Engagement Partner team.

Feature Availability—If you purchased or upgraded to Account Engagement Advanced or Premium after February 11, 2019, you can create more than one business unit. You also need Salesforce Enterprise Edition or higher. Other Salesforce editions incur API data charges. Certain features that are essential to using multiple business units, such as Marketing Data Sharing and the business unit switcher, are available only in Account Engagement Lightning App. To access the Lightning app, users need a Sales, Service, or CRM license.

Data Visibility—The Salesforce data that's available to Account Engagement users is determined by their Salesforce permissions. The Account Engagement data that users see in Salesforce is determined by their business unit.

Control What Syncs to Business Units—You can control which objects, users, and data sync to each business unit. The method you use depends on the data you want to control.

To Control	Use
Lead, contact, opportunity, and custom object syncing	Marketing Data Sharing (recommended), or organization-wide defaults and sharing rules
Which users belong to a business unit	Salesforce User Sync and assign users to business units by public group membership, by role, or individually
Which connected campaigns sync to a business unit	Campaign record types when configuring Connected Campaigns

Asset and Prospect Activity Strategy—Assets and prospect activity can't be moved between business units. To avoid re-creating marketing assets or losing valuable prospect activity data, carefully plan your strategy before you begin implementation. Content created in a Lightning Builder can be shared across business units.

Salesforce Orgs and Business Units—You can connect multiple business units to a single Salesforce org. Business units provisioned from separate Salesforce orgs aren't connected, and share no global features. If your company plans on consolidating multiple Salesforce orgs, we recommend consolidating them before you enable more than one business unit.

Salesforce Connector and Syncing—When you provision a business unit, the Salesforce connector is created in a paused state. While the connector is paused, prospects and their related custom object records don't sync between Account Engagement and Salesforce, unless manually synced. Users configured with User Sync continue to sync while the connector is paused.

⚠ Warning: To ensure data syncs correctly, don't unpause the connector until after you set up Marketing Data Sharing criteria. The criteria you define tells Salesforce what data to share with each business unit.

Leads and Contacts Across Business Units—A lead or contact syncs to a prospect in a single business unit by default because they have a one-to-one relationship. Connecting a lead or contact to prospects in multiple business units creates data conflicts that can degrade sync performance. To sync leads or contacts to multiple business units, you have two options.

- Use the default configuration and maintain duplicate lead or contact records in Salesforce. This option maintains a one-to-one relationship between lead or contact records and one Account Engagement business unit.

- Edit the Salesforce connector for each business unit and select the option to stop syncing Account Engagement package fields. Then, reconfigure Marketing Data Sharing to let leads and contacts sync to multiple business units. With this option, package fields such as score and grade don't sync. If you need that data on your lead and contact records, work with a partner to develop a custom data flow using the Account Engagement bulk export API. For help with finding a partner to work with, contact the Account Engagement Partner team.

> **Note:** If you build a custom data flow, make sure only one Account Engagement business unit is set as the source of truth for any given field.

Records related to leads or contacts, such as accounts, opportunities, and custom objects, can exist in more than one business unit.

Marketing Data Sharing—Marketing Data Sharing routes CRM records to the corresponding business unit based on the records' Salesforce field values. We recommend creating a custom field, such as `Account_Engagement_Business_Unit__c`, on each object (Lead, Contact, Opportunity, and custom objects).

> **Note:** The legacy ObjectChangeLog isn't supported in orgs with Marketing Data Sharing. If you're upgrading from an earlier version and have customizations built around the ObjectChangeLog, you must re-create them with Marketing Data Sharing rules.

Connected Campaigns—To prevent data conflicts, associate your Salesforce campaigns with a single business unit. Campaigns are connected based on record type, so choose a different record type for each business unit during Connected Campaign configuration.

Tracker Domains—Tracker domains must be unique across your business units. As long as your subdomains are different, your root domains can be the same.

> **Example:** You have two business units and two subdomains. Use ww1.example-domain.com in the first business unit, and ww2.example-domain.com in the second business unit.

Email Sending Domains—You can set up business units to share email sending domains, or use unique domains. To use the same sending domain with more than one business unit, contact Salesforce Support.

Email Sending IP Addresses—If you're using a shared IP address, we can't guarantee that each business unit is on the same IP address. Dedicated IP addresses can't be shared between business units. If you decide to use dedicated IPs for each of your business units, you must maintain each IP address independently.

Sales Emails and Alerts—You can use most Sales Emails and Alerts features with multiple business units. Mobile features and the Outlook and Gmail plugins aren't available.

Mobile—Mobile features aren't available when you use multiple business units.

Einstein for Account Engagement—Einstein features, such as Behavior Scoring and Campaign Insights, are available when you use multiple business units. For more details, see Account Engagement Einstein.

Business Unit Switcher

Some users, such as Account Engagement admins and marketing managers, can switch between business units to manage assets, records, and settings.

To switch between business units, users must have:

- User Sync enabled and a verified v2 Salesforce connector.
- Access to Account Engagement Lightning App.
- A user record in each business unit, all connected to the same Salesforce org. Each user record must be connected to the same Salesforce user.

What's Affected By the Business Unit Switcher

When you switch between business units, Account Engagement components show the data and assets from only your current business unit. Pages without these components, such as a campaign list view, aren't affected when you switch business units.

Account Engagement Lightning App pages show only the records and assets from only the current business unit. For example, the Prospects page shows only the prospect records associated with the current business unit. On Leads, Contacts, Campaigns, and Reports pages, switching business units affects only the Account Engagement Visualforce pages and Lightning Actions and components on those pages.

If your page layouts include Visualforce pages or Lightning Actions from the Account Engagement managed package, pages show and interact with data from only the current business unit.

- The following lead and contact Visualforce pages show only the activities and lists related to the current business unit.
  - AddToPardotList
  - EngageCampaignsContactRecord
  - EngageCampaignsLeadRecord
  - Marketing Action Summary Contact
  - Marketing Action Summary Lead
  - Pardot Activities
  - Pardot List Membership
  - Pardot Social Data
  - SendPardotEmailContact
  - SendPardotEmailLead

- The following Lightning Actions and components show and interact with only the data related to the current business unit.
  - Send Engage Email (shows related templates)
  - Add to Nurture Lightning (shows related lists)
  - Send to Pardot (sends related leads and contacts)
  - Send Pardot Email (shows related templates)
  - Engagement History related lists and Lightning component (shows related activities)

Implementation Planning Worksheet

To make your Account Engagement implementation as efficient as possible, print and use this worksheet to decide how to handle each task for your implementation. Engage with stakeholders from across your business, such as the admin in charge of reporting, marketing directors, and sales leadership.

Task	Owner	Notes
Engage with a registered Salesforce Partner experienced with the implementation of multiple business units.		
Identify existing business units and audit for edition & feature adoption. (Optional)		
Choose what to base your business units on—such as geography, divisions, product lines, or acquisitions.		
Decide how many business units you need initially.		
Think about how many business units you need later.		

Task	Owner	Notes
Decide how many prospects you need across all business units.		
List which user to appoint as the admin for each business unit.		
List which users need access to which business units.		
Decide which Salesforce fields you want in each business unit.		
Decide which custom objects you want in each business unit.		
Outline criteria for Marketing Data Sharing rules, which control what Salesforce data syncs to each business unit.		
List the tracker domains you want to use with each business unit.		
Create a plan to aggregate datasets from each business unit for global reporting.		

CREATE AND CONFIGURE BUSINESS UNITS

A Salesforce admin uses the Setup Assistant to create business units and assign admins to Account Engagement. Then, the new business unit admin completes setup and configuration tasks from Account Engagement Lightning App.

Create a Business Unit
Before users can jump in and start marketing, a Salesforce admin must create a business unit and appoint an admin to activate it. The Setup Assistant makes it easy to create business units in Account Engagement.

Configure a Business Unit
When a Salesforce admin creates a business unit and appoints a user as the admin, the user gets an email notification with setup information. Business unit admins add users, configure Marketing Data Sharing rules, and configure Account Engagement before unpausing the Salesforce connector to begin data syncing.

Create a Business Unit

Before users can jump in and start marketing, a Salesforce admin must create a business unit and appoint an admin to activate it. The Setup Assistant makes it easy to create business units in Account Engagement.

The company name field in Account Engagement Settings acts as the source of truth for a given business unit name. If a conflict exists, the company name field overwrites the business unit name in Salesforce Setup.

USER PERMISSIONS

To create business units:
- Customize Application and Modify All Data

1. From Marketing Setup, enter *Business* in the Quick Find box, and then select **Business Unit Setup**.

2. Enter a name for the business unit.

3. Choose an admin for the business unit. The admin is responsible for activating the business unit and adding users.

4. Save the business unit.

After you save the business unit, we send the appointed admin a welcome email to guide them through the activation process. After activation, the admin can give other users the Administrator role from the Users page in the Account Engagement Settings tab.

The original provisioning admin listed in Settings is read-only and can't be changed.

Configure a Business Unit

When a Salesforce admin creates a business unit and appoints a user as the admin, the user gets an email notification with setup information. Business unit admins add users, configure Marketing Data Sharing rules, and configure Account Engagement before unpausing the Salesforce connector to begin data syncing.

Before you begin, make sure that your Salesforce admin enabled Account Engagement Lightning App and that you have access.

USER PERMISSIONS

To configure a business unit:
- Account Engagement Administrator role and access to Account Engagement Lightning App

⚠ Warning: Don't unpause the connector until you've configured Marketing Data Sharing rules. Unpausing before you finish configuring rules can cause data to sync to the wrong business units.

> **Note:** This implementation guide covers only the setup tasks related to configuring multiple business units. For all the steps to get Account Engagement fully configured, check out the Account Engagement Implementation Guide (PDF).

User Management

Configure Salesforce User Sync to create and manage Account Engagement access from Salesforce. User Sync is automatically enabled in all business units created in Summer '20 and later.

Configure Marketing Data Sharing Rules

Use Marketing Data Sharing rules to sync a subset of leads, contacts, opportunities, and custom objects.

User Management

Configure Salesforce User Sync to create and manage Account Engagement access from Salesforce. User Sync is automatically enabled in all business units created in Summer '20 and later.

Salesforce User Sync lets Account Engagement admins choose which users are synced to a business unit. We recommend you create a public group for each business unit. Then, assign users to Account Engagement based on business unit group membership when you set up. If you're using Connector v2, users sync without unpausing the connector.

If a business unit was created Summer '20 or later, and you don't want to manage users in Salesforce, create users in Account Engagement. Then manually map them to Salesforce users, and set up Salesforce single sign-on (SSO).

SEE ALSO:

Connect Account Engagement and Salesforce Users

Configure Marketing Data Sharing Rules

Use Marketing Data Sharing rules to sync a subset of leads, contacts, opportunities, and custom objects.

> ⛔ **Important:** Before making changes, pause the Salesforce connector and ensure that all your business units are using the Salesforce connector v2.

Before creating Marketing Data Sharing rules, keep these considerations in mind.

- Each object can have only one rule. Each rule can be based on one Salesforce field and uses the equals operator.

- You can base a rule only on Salesforce fields that aren't mapped to an Account Engagement field. The field must belong to the rule's object, and the connector user must have read and edit access to it. If needed, change the field-level security to give the connector user access to the field.

- Marketing Data Sharing rules must be unique for each Account Engagement business unit. If a rule isn't unique, sync issues can occur that skew your data.

- The Default setting for an object uses the connector user's permissions to control which records sync. When you create a rule for an object, both the rule and the connector user's permissions control which records sync.

- Marketing Data Sharing rules are case-sensitive. Make sure that you match the capitalization for the corresponding field values in Salesforce.

EDITIONS

Available in: Account Engagement Lightning App in Account Engagement **Advanced** Edition purchased or upgraded after February 12, 2019

USER PERMISSIONS

To configure Marketing Data Sharing rules:
- Account Engagement Administrator role

1. In the Lightning app, select **Account Engagement Settings** and then select **Connectors**. Click ⚙ next to the Salesforce connector and then elect **Edit Settings**. Select **Marketing Data Sharing**.

2. Open a rule for editing.

3. Configure the rule.

4. Save the rule.
   When an object has a rule, the details appear in the Criteria column on the Marketing Data Sharing tab.

👁 Example: If you want to sync only the leads in Europe, create a rule on the lead object based on the "region" custom field:
```
region__c= Europe.
```

If you use Marketing Data Sharing rules for leads or contacts, criteria must be created for both leads and contacts. If you have multiple business units, you must add criteria for both leads and contacts in each business unit.

SET UP B2BMA FOR BUSINESS UNITS

Gain deeper insight into your business unit's performance in B2B Marketing Analytics. For each business unit, create an analytics app that presents datasets of Account Engagement and Sales or Service Cloud data in easy-to-read dashboards.

Before you get started, keep these points in mind.

- Each business unit can have only one associated B2B Marketing Analytics app.
- To use B2B Marketing Analytics with multiple business units, you need a CRM Analytics Growth or Plus user license. These licenses support the data volume and offer global, customizable views into your data.
- Creating an aggregated view of your data is a manual process outside of Salesforce Customer Support's scope. We recommend that you work with a partner with CRM Analytics certifications to set up this part of your integration.

> 📝 **Note:** To complete setup, you need your business unit ID. You can find the ID in on the Account Engagement Settings tab under Account Information.

1. In Salesforce, from the App Launcher (⠿), find and open **Analytics Studio**.
2. Click **Create** and select **App**.
3. Click **Start from Template** and then select **B2B Marketing Analytics**.

   The app called B2B Marketing Analytics Legacy is no longer supported. Click through to the Details page, and verify that Version 2.0 appears in the sidebar.
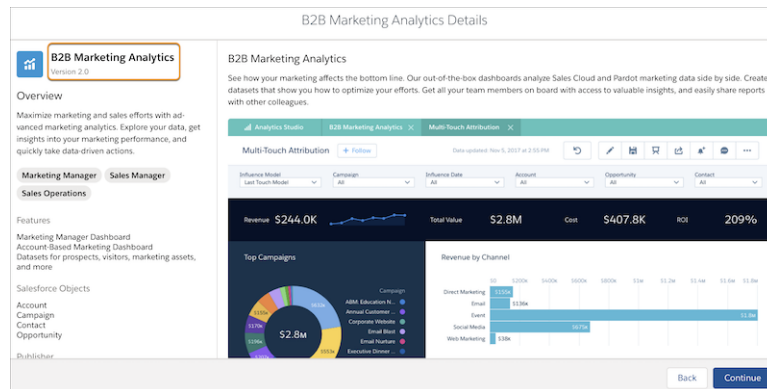
4. Click **Next** and continue through setup.
5. Click **Done**.

> 📝 **Note:** During the setup process, choose whether to include optional dashboards and datasets.

USER PERMISSIONS

To create a B2B Marketing Analytics app:
- Manage CRM Analytics Templated Apps AND Create B2B Marketing Analytics Apps OR B2B Marketing Analytics permission set

To use B2B Marketing Analytics
- Use CRM Analytics AND Create B2B Marketing Analytics Apps OR B2B Marketing Analytics permission set

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

SEE ALSO:

[Explore Data and Take Action with CRM Analytics](#)