



Salesforce-Pardot Connector v2 Implementation Guide

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SETTING UP A SALESFORCE-PARDOT CONNECTION FOR ACCOUNTS PURCHASED AFTER FEBRUARY 11, 2019

For Pardot accounts purchased after February 11, 2019, only a Salesforce admin from within Salesforce can install and enable Pardot. To complete setup, the Salesforce admin appoints a Pardot admin who can configure the Pardot account. A Pardot admin doesn't have to be a Salesforce admin. Before enabling Pardot and configuring the admin account, review these prerequisites.

 **Tip:** For easier navigation, download the [PDF version of these instructions](#).

- Before you enable Pardot, grant the user who you're assigning as the Pardot admin access to the Pardot Lightning app. The admin sets up Pardot from this Lightning app. See [Pardot in Lightning Experience](#).
- After enabling Pardot, the assigned Pardot admin is sent an email with the next steps. It usually takes a few minutes to receive the email.

[Considerations for Using the Salesforce-Pardot Connector](#)

Before setting up your Salesforce-Pardot connector (v1), or unpausing your connector (v2), review considerations such as syncing fields and prospects, mapping users, and other setup tasks.

[Considerations for Accounts That Allow Multiple Prospects with the Same Email Address](#)

The most important aspect of the Salesforce sync is creating a one-to-one relationship between a Pardot prospect and a Salesforce lead, contact, or person account. The Salesforce connector uses CRM ID as the matching criteria for syncing in both directions in accounts that allow multiple prospects with the same email address.

[Choose a Sync Method](#)

When the integration user is set as the connector user, the connector syncs all records for objects that sync between Pardot and Salesforce. If you want to sync a subset of records, use Marketing Data Sharing to select the records to sync. Use the included integration user, or configure your own connector user.

[Step 1: Install the Package and Enable Pardot](#)

Salesforce and Pardot share prospect and opportunity data. A Salesforce admin can install the Pardot AppExchange package. If you purchased Pardot after February 11, 2019, you enable the package from Salesforce.

[Step 2: Configure Salesforce for the Salesforce-Pardot Connector](#)

During configuration, a Salesforce admin can map custom fields, add Pardot components to page layouts, and grant Pardot data access to users.

[Step 3: Configure Pardot](#)

A Pardot admin can map custom fields and users, test the connector, and perform an initial prospect sync.

Considerations for Using the Salesforce-Pardot Connector

Before setting up your Salesforce-Pardot connector (v1), or unpausing your connector (v2), review considerations such as syncing fields and prospects, mapping users, and other setup tasks.

General

- You can have only one Salesforce connector in Pardot.

- If your Salesforce org has clickjack protection enabled, add a clickjack protection–compatible Visualforce page to view Pardot data in Salesforce.
- Pardot can integrate with Salesforce Person Account record types. To enable person account syncing, contact Pardot Support.
- Importing prospects into Pardot causes them to sync with Salesforce. Unassigned prospects sync to Salesforce, but records aren't created when there is no matching email address.
- Pardot checks for changes in Salesforce and Pardot up to every 2 minutes. If you're seeing slower sync times, contact Pardot Support. If you're updating a large volume of records at a time, it can take longer for all changes to sync.

Connector Version 2

The following applies when using Connector version 2.

- When your Pardot account is provisioned, the connector is created in a paused state. Before unpausing the connector to begin syncing, review the settings and configure Marketing Data Sharing if you want to use it. Records don't sync until the connector is unpaused. Prospects can be manually synced with **Sync with CRM** on a prospect record, or **Send to Pardot** on a lead or contact record.
- The integration user has access to all records that can sync between Salesforce and Pardot. If you want to control which records are shared, set up Marketing Data Sharing. If you don't want to use Marketing Data Sharing, you can change the connector user to a user with your preferred permissions. For details, see [Pardot Integration User](#).
- If you link multiple Pardot accounts to one Salesforce account, you can't use the integration user unless you're also using Marketing Data Sharing

Syncing Fields Between Salesforce and Pardot

- Salesforce updates to prospect fields can trigger Pardot automation rules when rules related to those fields exist.
- Prospects that are assigned to a user in Pardot are created as a lead when the prospect is not syncing with a record in Salesforce.

Mapping Pardot Users to Salesforce Users

Map Pardot users with assigned prospects to Salesforce users before syncing. If a prospect's assigned user isn't mapped to a Salesforce user, the prospect is assigned to the Salesforce connector user.

Syncing Prospects

- Pardot syncs on the individual level, not the company level.
- Pardot syncs according to CRM ID. The prospect must have the same CRM ID in Pardot and Salesforce to sync.
- Pardot looks for a matching CRM ID to sync with. If a prospect is not syncing with a Salesforce record, Pardot creates a lead to sync with.
- If a prospect record doesn't have a CRM ID and a record with the email address exists in Salesforce, Pardot syncs to the record. If there are multiple records in Salesforce with the same email address as the prospect, Pardot syncs with the first record it finds.

Syncing Prospect Activity and Email

- Pardot activities, such as page views, form completions, site searches, and emails, appear in the Prospect Activities window in the prospect's CRM record. However, only emails are created as a CRM activity or task.

- Pardot logs an email in the activity section of the CRM record when sending out a list email or a one-to-one email using the Pardot plug-in.
- Email syncing is controlled in your connector settings.

Syncing Opportunities

- Opportunity activities are included in the default scoring (+50 points for created opportunity, –100 points for lost opportunity). When the connector is enabled, prospect scores update accordingly. Score updates can affect automation or lead assignment rules already in place.
- If you do not use opportunities in Salesforce, Pardot support can disable opportunity syncing.
- If Salesforce has duplicate records, the activity iframe appears in all the records. However, the Pardot data fields appear only in the record that Pardot is syncing with.

Considerations for Accounts That Allow Multiple Prospects with the Same Email Address

The most important aspect of the Salesforce sync is creating a one-to-one relationship between a Pardot prospect and a Salesforce lead, contact, or person account. The Salesforce connector uses CRM ID as the matching criteria for syncing in both directions in accounts that allow multiple prospects with the same email address.

When Salesforce creates a lead, contact, or person account with a specific email address, a prospect is created in Pardot with a matching CRM ID. Data from each record syncs according to the sync behavior defined for each field. Prospects are created in Pardot only if the Salesforce connector user has permission to the record in Salesforce.

If a prospect doesn't have a CRM ID and multiple records with the same email address exist in Salesforce, the prospect syncs to the record with the most recent activity.

When a prospect is created in Pardot and it meets your criteria to begin syncing, it creates a record in Salesforce following your connector's settings.

Accounts that allow multiple prospects with the same email address have fewer connector settings. The connector creates prospects when it finds new leads, contacts, or person accounts and syncs changes among those records. When it detects merged or deleted records in Salesforce, it updates the corresponding Pardot prospects and sends deleted records to the Pardot recycle bin.

Choose a Sync Method

When the integration user is set as the connector user, the connector syncs all records for objects that sync between Pardot and Salesforce. If you want to sync a subset of records, use Marketing Data Sharing to select the records to sync. Use the included integration user, or configure your own connector user.

When using Marketing Data Sharing, we recommend that you use the integration user instead of configuring your own connector user. The integration user is preconfigured with the necessary permissions and doesn't require an additional license.

[Pardot Integration User](#)

The Pardot integration user is an automatically provisioned user that connects to Salesforce to sync data. Pardot is the only app that can log in to Salesforce via the integration user, and only after a Salesforce admin has finished the Pardot setup.

[Configure the Connector User](#)

The connector user is a user that you designate to connect Pardot and Salesforce for data syncing. These tasks apply only to accounts that aren't using the Pardot integration user.

Pardot Integration User

The Pardot integration user is an automatically provisioned user that connects to Salesforce to sync data. Pardot is the only app that can log in to Salesforce via the integration user, and only after a Salesforce admin has finished the Pardot setup.

The Pardot Connected App uses a secure authentication method that lets the Pardot application servers authenticate to Salesforce. The connected app contains the public half of a secure key pair provisioned to Pardot. See [OAuth 2.0 JWT Bearer Flow for Server-to-Server Integration](#).

Here are a few things to note about the integration user.

- It's named B2BMA Integration, with the username b2bmaintegration@<org-id>.ext. The profile and integration usernames both include B2BMA, but they are not related to B2B Marketing Analytics.
- It's provisioned with the B2BMA Integration User profile, which grants the user permission to view and modify data that Pardot syncs with Salesforce.
- It doesn't use a standard Salesforce user license.
- It doesn't have a password, and can't log in to Salesforce directly.
- Changes that happen as the result of the Salesforce-Pardot integration are attributed to the integration user. You can easily determine which updates to Salesforce objects are due to the integration, and which are due to user actions.
- The integration user authenticates to Salesforce via the Pardot Integration Connected App that is installed during Pardot setup.
- The integration user has campaign access but doesn't require the Pardot Marketing User role.

Configure the Connector User

The connector user is a user that you designate to connect Pardot and Salesforce for data syncing. These tasks apply only to accounts that aren't using the Pardot integration user.

[Assign the Pardot Connector User Permission Set](#)


After the Pardot package is installed in your Salesforce org, you grant the connector user the Pardot Connector User permission set.

[Assign Object Permissions to the Connector User](#)

Because of Salesforce security restrictions, an admin must manually configure your connector user's permissions for Salesforce standard objects. These objects aren't covered by the Pardot Connector User permission set. This step applies only to accounts with Salesforce-Pardot connector v1, or accounts using Marketing Data Sharing.

Assign the Pardot Connector User Permission Set

After the Pardot package is installed in your Salesforce org, you grant the connector user the Pardot Connector User permission set.

 **Note:** Apply the Pardot Connector User permission set only to your Pardot connector user. Do not assign the Engage permission set from this page. The Engage permission is assigned from the licensing page.

Before you begin, make sure that the connector user has these permissions:

- API Enabled
- Manage Profiles and Permission Sets
- View All Users
- View Setup and Configuration

1. From Setup, enter *users* in the Quick Find box, then select **Users**.
2. Select the connector user.
3. Scroll to Permission Set Assignments, and click **Edit Assignments**.
4. In the Available Permission Sets box, click **Pardot Connector User** to highlight it, then click the **Add** arrow button.
5. Save the user.

USER PERMISSIONS

To assign permission sets:

- Assign Permission Sets (in Salesforce)

To edit object permissions:


- Manage Profiles and Permission Sets

AND

Customize Application (in Salesforce)

Assign Object Permissions to the Connector User


Because of Salesforce security restrictions, an admin must manually configure your connector user's permissions for Salesforce standard objects. These objects aren't covered by the Pardot Connector User permission set. This step applies only to accounts with Salesforce-Pardot connector v1, or accounts using Marketing Data Sharing.

 **Note:** How you apply these permissions is up to you. For more information about permissions, see the [User Permissions documentation](#).

The Pardot Connector user should have these permissions for these standard objects.

Object Name	Object Permissions	Field Permissions
Accounts	View All	All standard and custom fields syncing with Pardot
Campaigns	Create/Edit/Read/View All	All standard and custom fields syncing with Pardot
CampaignMember	Create/Read/Edit	All standard and custom fields syncing with Pardot
Contacts	Create/Edit/Read/View All/Modify All	All standard and custom fields syncing with Pardot
Leads	Create/Edit/Read/View All/Modify All	All standard and custom fields syncing with Pardot
ObjectChangeLogs	View All/Modify All	All
Opportunity	View All	All standard and custom fields syncing with Pardot

Object Name	Object Permissions	Field Permissions
Task	Edit Tasks	All standard and custom fields syncing with Pardot
Users	View All Users	All standard and custom fields syncing with Pardot

 **Note:** Pardot recommends that your connector user also has the View Setup and Configuration permission. This permission makes it possible for support to troubleshoot issues with the connector.

Step 1: Install the Package and Enable Pardot

Salesforce and Pardot share prospect and opportunity data. A Salesforce admin can install the Pardot AppExchange package. If you purchased Pardot after February 11, 2019, you enable the package from Salesforce.

[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 Pardot accounts purchased after February 11, 2019 and appoint a Pardot admin to manage the account. If you have Pardot Business Units, a Salesforce admin must create each business unit and appoint a unique Pardot admin to each.

[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.

Install the Pardot AppExchange Application

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

 **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**.


USER PERMISSIONS

To install the Pardot package:

- Download AppExchange Packages (in Salesforce)

Enable Pardot in Salesforce

A Salesforce admin must enable Pardot accounts purchased after February 11, 2019 and appoint a Pardot admin to manage the account. If you have Pardot Business Units, a Salesforce admin must create each business unit and appoint a unique Pardot admin to each.




 **Note:** For the best setup experience, we recommend using the Pardot Setup Assistant in Lightning Experience. The functionality in Salesforce Classic is limited. If you're using Lightning Experience, make sure that the user you appoint as Pardot admin has access to the Pardot Lightning app. See [Pardot in Lightning Experience](#).


1. From Setup, in the Quick Find box, enter *Pardot*, and then select **Pardot Account Setup**.
2. Follow the on-screen setup instructions.

After you complete provisioning and admin assignment, Pardot sends the Pardot admin an email to start the setup process. If you created business units, Pardot sends each admin an email to start the setup process for their business unit.

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 unpause.

Step 2: Configure Salesforce for the Salesforce-Pardot Connector

During configuration, a Salesforce admin can map custom fields, add Pardot components to page layouts, and grant Pardot data access to users.

[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.

[Show Pardot Data 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.

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

[Add Custom Pardot Buttons to Salesforce Page Layouts](#)

The Send to Pardot button makes it easy to add Salesforce leads or contacts to Pardot. If a corresponding record exists, the button syncs the records instead of creating a prospect. The Send Pardot Email button lets Salesforce users who are assigned the Pardot permission set to send a Pardot-tracked email from Salesforce.

[Adding Pardot Standard Actions to Salesforce](#)

Add Pardot buttons and actions to Salesforce as standard actions in list views and on certain record pages.

[Add Scoring Category Scores to Page Layouts](#)


If your Pardot account uses scoring categories, you can add the scores to your lead and contact page layouts.

[Give Users Access to Pardot Data in Salesforce](#)

Apply the Pardot permission set that is included with the AppExchange package to any user who accesses or uses Pardot data in Salesforce.

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.

 **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.

USER PERMISSIONS

To map lead fields:

- Customize Application (in Salesforce)

Show Pardot Data 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**.

USER PERMISSIONS

To customize page layouts:

- Customize Application (in Salesforce)

- 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.

Add Custom Pardot Buttons to Salesforce Page Layouts

The Send to Pardot button makes it easy to add Salesforce leads or contacts to Pardot. If a corresponding record exists, the button syncs the records instead of creating a prospect. The Send Pardot Email button lets Salesforce users who are assigned the Pardot permission set to send a Pardot-tracked email from Salesforce.

 **Note:** Users must be SSO-enabled to use Send to Pardot.

1. Open your lead or contact page layout for editing.
2. In the palette, scroll to the Buttons category (Classic) or to Mobile & Lightning Actions (Lightning Experience).
3. Select the **Send to Pardot** and **Send Pardot Email** buttons, and drag them to the Custom Buttons box (in Classic). To add the buttons to Lightning Experience, drag them to the Salesforce Mobile and Lightning Experience Actions section.
4. Save your page layout when finished.

Repeat these steps for lead and contact page layouts.

USER PERMISSIONS

To customize page layouts:

- Customize Application (in Salesforce)

Adding Pardot Standard Actions to Salesforce

Add Pardot buttons and actions to Salesforce as standard actions in list views and on certain record pages.

Add actions to record pages in Salesforce in the Page Layout of the standard object such as the Lead or Contact object. To add actions to list views, customize a search layout from the management settings for the appropriate object.

USER PERMISSIONS

To create custom buttons:

- Customize Application

Action	Availability in Salesforce
Add to Pardot List	Object Page Layouts
	• Lead
	• Contact
	List View Objects
Add to Engagement Studio List	Object Page Layouts
	• Lead
	• Contact
	List View Objects
	• Lead
	• Contact

Add Scoring Category Scores to Page Layouts

If your Pardot account uses scoring categories, you can add the scores to your lead and contact page layouts.

1. Open your lead or contact page layout for editing.
2. In the editor, click **Related Lists**.
3. Drag **Pardot Category Score** to the layout.
4. (Optional) Edit the Pardot Category Score properties to include only Scoring Category Name, Score, and Last Modified Date, and sort descending by score.

EDITIONS

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


USER PERMISSIONS

To customize page layouts:

- Customize Application (in Salesforce)

Give Users Access to Pardot Data in Salesforce

Apply the Pardot permission set that is included with the AppExchange package to any user who accesses or uses Pardot data in Salesforce.

 **Note:** Do not assign the Engage permission set from this page. The Engage permission is assigned from the licensing page.

1. From Setup, enter *Permission Sets* in the Quick Find box, then select **Permission Sets**.
2. Click **Pardot**.
3. Click **Manage Assignments**.
4. Click **Add Assignments**.
5. Select the users that you want to assign the permission set to.
6. Click **Assign**.

USER PERMISSIONS

To assign permission sets:

- Assign Permission Sets (in Salesforce)

Step 3: Configure Pardot

A Pardot admin can map custom fields and users, test the connector, and perform an initial prospect sync.

[Map Salesforce and Pardot Custom Fields](#)

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

[Connect Pardot and Salesforce Users](#)

Associate your Salesforce users with Pardot users to attribute assignments and actions to the right users. You can manually map users and set up SSO, or you can use Salesforce User Sync to create and manage users from Salesforce.

[Test the Salesforce-Pardot Connector](#)


After you set up the Salesforce-Pardot connector, you can test to make sure that the connector is syncing as expected.

[Trigger the Initial Prospect Sync](#)

After you've connected Salesforce and Pardot, import your existing leads and contacts into Pardot. The connector doesn't automatically create prospects in Pardot from existing Salesforce leads and contacts. Upon import, Pardot syncs the prospect record with the existing Salesforce lead or contact record. Future updates to records in either system then sync automatically.

Map Salesforce and Pardot Custom Fields

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.

Connect Pardot and Salesforce Users

Associate your Salesforce users with Pardot users to attribute assignments and actions to the right users. You can manually map users and set up SSO, or you can use Salesforce User Sync to create and manage users from Salesforce.

[Manage Users with Salesforce](#)

Salesforce User Sync streamlines managing your users who use both Salesforce and Pardot. First, assign Salesforce users to create connected Pardot users. After you enable Salesforce User Sync or transfer control to Salesforce, you manage all users in Salesforce—no need to update user records in both systems.

[Map Users Manually](#)

Associating CRM usernames with Pardot users lets you enable single sign-on (SSO) between Pardot and Salesforce and attribute assignments and actions to the right users.

Manage Users with Salesforce

Salesforce User Sync streamlines managing your users who use both Salesforce and Pardot. First, assign Salesforce users to create connected Pardot users. After you enable Salesforce User Sync or transfer control to Salesforce, you manage all users in Salesforce—no need to update user records in both systems.

USER PERMISSIONS

To map fields:

- Pardot Administrator role

USER PERMISSIONS

To map usernames and enable SSO:


- Pardot Administrator role

To enable Salesforce User Sync:

- Pardot Administrator role

EDITIONS

Available in: All Pardot Editions

 **Tip:** For easier navigation and helpful implementation tips, download the [User Sync Implementation Guide \(PDF\)](#).

[Considerations for Managing Users with Salesforce](#)

Before you enable Salesforce User Sync and begin managing users with Salesforce, keep these considerations in mind.

[Enable Salesforce User Sync](#)

To create Pardot users from Salesforce, Pardot admins must enable Salesforce User Sync or give user management control to Salesforce.

[Map Salesforce and Pardot Usernames](#)

Before you can enable Salesforce single sign-on (SSO), you must map all your Pardot users to their associated Salesforce user record.


[Update Profile and Role Mapping](#)

Pardot admins can change profile and user role mappings to update the roles that assigned Pardot users are given.


Considerations for Managing Users with Salesforce

Before you enable Salesforce User Sync and begin managing users with Salesforce, keep these considerations in mind.

General Considerations for Enabling Salesforce User Sync

 **Note:** If your Pardot account or business unit was created after the Summer '20 release, Salesforce User Sync is already enabled by default. Check your Pardot account settings to see if Salesforce User Sync is enabled already. Assign users from Salesforce, and then no further action is required. See [Assign Salesforce Users to Pardot](#) for more information.

- Salesforce User Sync is enabled by default for new business units and accounts created after the Summer '20 release.
- You must have a verified Salesforce-Pardot connector.
- To switch between business units, you must have User Sync enabled and a verified Salesforce-Pardot v2 connector.
- You can't disable Salesforce User Sync after it's enabled.
- To avoid problems with user creation and deletion, assign users from Salesforce before enabling Salesforce User Sync.

 **Important:** Don't test in production when enabling this feature. Any Pardot users that are connected to a CRM user, but haven't been assigned from Salesforce are archived when Salesforce User Sync is enabled.

- When you enable Salesforce User Sync, Pardot users already connected to a Salesforce user are converted to synced users. Synced users can't use Pardot credentials to log in to Pardot. They must use the Log In With Salesforce button or use the Pardot Lightning app. Pardot-only users can log in with their Pardot credentials.
- If an assigned user exists in Pardot, but is archived in the recycle bin, they are unarchived and synced instead of creating a duplicate user.
- Changes to user records typically sync within 10 minutes. For accounts with tens of thousands of users, a sync can take up to an hour.
- Sometimes users that are assigned don't have the same level of access to CRM data in Salesforce as they do in Pardot. Admins can make permissions equivalent by manually creating Salesforce sharing rules that match their Marketing Data Sharing criteria and apply those sharing rules to the Pardot marketing user group. For example, if in Business Unit A, the Marketing Data Sharing criteria for leads is "Region__c = United States", make a Salesforce sharing rule for the Lead object where "Region__c = United States". Apply the sharing rule to the Pardot marketing user group for Business Unit A.

User Management

- Salesforce admins choose which users are assigned to Pardot. When a Salesforce user is assigned from Salesforce Setup, the user is created in Pardot.
- Synced users can't be converted to Pardot-only users.
- Synced users respect all Salesforce login restrictions such as allowlisted IP ranges and restricted login hours. Pardot user security settings, including Pardot's two-factor authentication and IP location activation, don't apply to synced users.
- You can create a Pardot-only user in Pardot, but if you map them to a Salesforce user they convert to a synced user. Synced users can't log in to Pardot directly and must use Log in with Salesforce or the Pardot Lightning app.
- 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.
- You can't import users in Pardot after Salesforce User Sync is enabled. Instead, import and sync users from Salesforce.
- Reset synced user passwords in Salesforce and Pardot-only user passwords from Pardot.
- Pardot email notifications are disabled for new synced users. The user or a Pardot admin can enable email notifications manually in Pardot.
- 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.


Integrations


Because synced users can't log in to Pardot directly, they can't be used for some integrations and plug-ins.

- Use a Pardot-only user with your Pardot WordPress plug-in.
- Synced users can use Salesforce Engage, Engage for Gmail, and Engage for Outlook.

Enable Salesforce User Sync

To create Pardot users from Salesforce, Pardot admins must enable Salesforce User Sync or give user management control to Salesforce.

 **Note:** If your Pardot account or business unit was created after the Summer '20 release, Salesforce User Sync is already enabled by default. Check your Pardot account settings to see if Salesforce User Sync is enabled already. Assign users from Salesforce, and then no further action is required. See [Assign Salesforce Users to Pardot](#) for more information.

 **Important:** Before you enable this feature, understand these prerequisites.

- You must have a verified Salesforce connector, and your connector user must have the required permissions. See [Connecting Pardot and Salesforce](#).
- Assign users in Salesforce before enabling Salesforce User Sync.
- Audit Pardot users to make sure that they are linked to the correct CRM usernames. After Salesforce User Sync is enabled, you can't unlink users.

1. Open the Users page. Select **Admin (Pardot Settings)** in the Lightning app), and then **User Management > Users**.
2. Click **Enable Salesforce User Sync**.
3. Follow the prompts.
4. Map Salesforce profiles to Pardot user roles. All assigned Salesforce users with the selected profiles are created as Pardot users with the assigned Pardot role.
5. Confirm the settings.

USER PERMISSIONS

To enable Salesforce User Sync:


- **Pardot Administrator** role

6. When finished mapping profiles, click **Enable Salesforce User Sync**.

Usually, users are created within 10 minutes. For accounts with tens of thousands of users, it can take up to an hour.

Map Salesforce and Pardot Usernames

Before you can enable Salesforce single sign-on (SSO), you must map all your Pardot users to their associated Salesforce user record.


 **Note:** Before you begin, make sure you have created the Pardot and Salesforce users you want to map.

1. Open the Pardot user record for editing.
2. From the CRM Username dropdown, select the Salesforce user.
3. Save the user.
4. Click the **verify now** link in the CRM Username line of the user record.

Repeat these steps for each user you want to map.

Update Profile and Role Mapping

Pardot admins can change profile and user role mappings to update the roles that assigned Pardot users are given.

1. Open the Connectors page.
 - In Pardot, select **Admin** and then **Connectors**.
 - In the Lightning app, select **Pardot Settings**, and then **Connectors**.
2. Click  next to the Salesforce connector, and then select **Edit**.
3. In the Pardot Lightning app, click the **User Sync** tab. In Pardot, go to Salesforce User Sync.
4. Map Salesforce profiles to Pardot roles using the dropdowns.
5. When finished, save the connector.

When you update a profile's mapping, all assigned Pardot users with the Salesforce profile are given the new role within 10 minutes. Typically, users sync within 10 minutes. For accounts with tens of thousands of users, it can take up to an hour.

USER PERMISSIONS

To edit Salesforce User Sync mappings:

- Pardot Administrator role

Map Users Manually

Associating CRM usernames with Pardot users lets you enable single sign-on (SSO) between Pardot and Salesforce and attribute assignments and actions to the right users.

[Map Salesforce and Pardot Usernames](#)


Before you can enable Salesforce single sign-on (SSO), you must map all your Pardot users to their associated Salesforce user record.

[Set Up SSO for Salesforce and Pardot](#)

Single sign-on (SSO) lets your users transition between Salesforce and Pardot seamlessly without logging in separately. After you've mapped Pardot and Salesforce users, you can enable SSO for users from User Management.

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Set Up SSO for Salesforce and Pardot

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 **Note:** If you enable SSO for users who are created via import or haven't activated their Pardot user seat, the users can't access Pardot directly. They don't have a Pardot password and can access Pardot only through the CRM. Their Pardot user records are marked as SSO-only. Users marked as SSO-only don't have access to email plug-ins or LeadDeck.

 **Note:** If your account uses Pardot Business Units, and was purchased after April 25, 2019, there are special considerations for SSO. When a user links their Salesforce and Pardot user records, they are converted to an SSO-only user. They are able to access Pardot only with their Salesforce credentials, and cannot unlink their Salesforce and Pardot user records in the future. If the user has access to more than one business unit, they can't use the Log In with Salesforce button to access Pardot.

1. Open the Users page. Select **Admin (Pardot Settings)** in the Lightning app), and then **User Management > Users**.
2. Select the users for whom you want to enable SSO.
3. From the dropdown under the table, select **Enable Salesforce single sign-on**.

Users can also enable SSO for themselves from their user settings.

Test the Salesforce-Pardot Connector

After you set up the Salesforce-Pardot connector, you can test to make sure that the connector is syncing as expected.

Test Accounts That Don't Allow Multiple Prospects with the Same Email Address

1. New Pardot prospect with an existing salesforce record—Create a prospect record in Pardot that exists in your CRM. To check whether the record syncs, click **Sync with CRM**, or wait 10–15 minutes to see if the connector initiates the sync.
2. New Pardot prospect with a new Salesforce record—Create a prospect record in Pardot with an email address of a Salesforce record that doesn't exist. Add a record in Salesforce with the same email address. To check whether the record syncs, click **Sync with CRM**, or wait 10–15 minutes to see if the connector initiates the sync.
3. Assign prospects in Pardot—Create a prospect in Pardot with an email address that doesn't exist in Salesforce, and assign the prospect to a user. Check to see whether a record is created in Salesforce.
4. Automatic prospect creation from new CRM record—If your connector is set up to create prospects in Pardot when a record is added in Salesforce, create a Salesforce record with an email address that doesn't exist in Pardot. Check whether Pardot has the new record.


Test in Accounts That Allow Multiple Prospects with the Same Email Address

1. Assign prospects in Pardot—Create a prospect in Pardot, and assign the prospect to a user. Check to see whether the record is created in Salesforce.

2. Create a record in Salesforce—Create a Salesforce record. Wait for the record to sync, or manually sync by clicking **Send to Pardot**. Check to see whether the record is created in Pardot.

Trigger the Initial Prospect Sync

After you've connected Salesforce and Pardot, import your existing leads and contacts into Pardot. The connector doesn't automatically create prospects in Pardot from existing Salesforce leads and contacts. Upon import, Pardot syncs the prospect record with the existing Salesforce lead or contact record. Future updates to records in either system then sync automatically.

-  **Note:** If your account allows multiple prospects with the same email address, you must import by CRM ID to match leads and contacts with prospects. If you do not import by CRM ID, prospects imported by email address create duplicate leads or contacts in Salesforce.