



Salesforce User Sync Implementation

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GETTING STARTED WITH SALESFORCE USER SYNC

Salesforce User Sync streamlines how you manage your users who access both Salesforce and Pardot. Assign Salesforce users to business units from Salesforce Setup to create and keep users in sync. Before you begin, check your Pardot Account Settings page to see if Salesforce User Sync is enabled—how you use this guide depends on whether you already use Salesforce User Sync. If it's already enabled in your account, pay extra attention to the section for accounts with Salesforce User Sync enabled before Summer '20.

[Considerations for Transferring User Management for Accounts with Salesforce User Sync Enabled Before Summer '20](#)

If Salesforce User Sync was enabled in your account before the Summer '20 release, there are some important things to know before transferring user management to Salesforce.

[Managing Pardot Users with Salesforce Basics](#)

To make things go smoothly, review this section before you implement Salesforce User Sync or transfer user management control to Salesforce.

[Considerations for Managing Users with Salesforce](#)

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

[Preparing to Enable Salesforce User Sync](#)

Before you enable Salesforce User Sync, take stock of the users in your Salesforce and Pardot accounts, and adjust user records and settings.

Considerations for Transferring User Management for Accounts with Salesforce User Sync Enabled Before Summer '20

If Salesforce User Sync was enabled in your account before the Summer '20 release, there are some important things to know before transferring user management to Salesforce.

- Until you transfer user management to Salesforce, Salesforce User Sync continues to work as it always has.
- Users are assigned to Pardot from Salesforce Setup. Assignment is no longer profile-based. Profiles are used only to map user roles in Pardot.
- Assign users to Pardot in Salesforce before you transfer user management control. Pardot users, excluding Pardot-only users, who aren't assigned in Salesforce are archived in the Pardot recycle bin when user management is transferred.
- After transferring user management, the User Sync section on the Salesforce-Pardot connector screen is used only for updating profile-to-role mapping.
- When you change a profile's mapping, all assigned Pardot users with the Salesforce profile are given the new role within 10 minutes.
- Salesforce User Sync settings are no longer available.

EDITIONS

Available in: All Pardot accounts that enabled Salesforce User Sync before the Summer '20 release

Setting	New Default Behavior
Update Pardot user role when a user's Salesforce profile changes	Users inherit their roles from the profile-to-role mapping table in Pardot.

Setting	New Default Behavior
Move Pardot user to the recycle bin when they no longer have an assigned profile	Profile-based user assignment no longer exists.
Skip Salesforce user whose email address matches an existing Pardot-only user	Pardot always skips the creation of a Pardot user when there already a Pardot-only user with a matching username or email address.

Managing Pardot Users with Salesforce Basics

To make things go smoothly, review this section before you implement Salesforce User Sync or transfer user management control to Salesforce.

First, a Salesforce admin assigns Salesforce users to Pardot from Salesforce Setup. Assigning users in Salesforce creates them as Pardot users. After the Salesforce admin finishes assigning users for each Pardot account, a Pardot admin enables Salesforce User Sync or grants Salesforce control over user management.

If your account or business unit was created after the Summer '20 release, then Salesforce User Sync is enabled by default. You still need a Salesforce admin to assign users, and a Pardot admin to map profiles to transfer user management to Salesforce.

When Salesforce User Sync is enabled, you can have two kinds of users: synced users, and Pardot-only users.

Synced User	Pardot-Only User
Managed in Salesforce	Managed in Pardot
Most user record fields are edited in Salesforce	All user record fields are edited in Pardot
Access Pardot using the Log In with Salesforce button, or from the Pardot Lightning app	Access Pardot at pi.pardot.com with Pardot credentials.
User role changed in profile-to-role mapping table in Pardot	User role changed on Pardot user record.

Salesforce User Sync has a few major impacts.

- All Pardot users mapped to an assigned CRM user become synced.
- Synced users no longer have separate Pardot credentials and must use Log in with Salesforce or the Pardot Lightning app.
- The Salesforce user record becomes the master, and Pardot fields are updated to match the Salesforce record.
 - When a synced user sends an email with Pardot, it’s sent from the email address on the Salesforce user record.
 - Pardot user alerts, like daily prospect activity emails and assignment notifications, are sent to the email address on the Salesforce user record.
- By default, all assigned users inherit the Pardot Marketing role, except in a few cases:
 - In new accounts and business units, the Salesforce System Administrator profile is mapped to the Pardot Administrator role.
 - The admin used to create a Pardot account or business unit has their Salesforce profile mapped to the Pardot Administrator role.
 - Users that are assigned to the Sales User group inherit the Pardot Sales role.

Salesforce User Sync affects new and existing users differently depending on the scenario.

Table 1: How Existing Users Are Affected When You Enable Salesforce User Sync

Scenario	Outcome
Existing Pardot user, not linked to Salesforce user	User is Pardot-only and not affected by Salesforce User Sync.
Existing Pardot user, assigned to Pardot from Salesforce Setup	When the user is assigned from Salesforce, then they're converted to a synced user. Their Pardot user role can be updated, based on what role their Salesforce profile is mapped to. The Salesforce user record becomes the master.
Existing Pardot user, not assigned to Pardot from Salesforce Setup	If they aren't assigned in Salesforce, they're archived in the Pardot recycle bin.



Table 2: How Salesforce User Sync Treats New Users

Scenario	Outcome
New Pardot user, not linked to a Salesforce user	User is Pardot-only and not affected by Salesforce User Sync.
New Salesforce user, assigned to Pardot from Salesforce Setup	Creates a user in Pardot.
New Salesforce user, not assigned to Pardot from Salesforce Setup	No Pardot user created.

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.

Preparing to Enable Salesforce User Sync

Before you enable Salesforce User Sync, take stock of the users in your Salesforce and Pardot accounts, and adjust user records and settings.

First, decide which Salesforce users you want to assign to Pardot.

Then, audit your Pardot account to prepare users for the change.

- Review your Pardot API integrations, including the WordPress plugin, and verify that they authenticate with a Pardot-only user. Authenticating with a synced user breaks integrations.
- To stop Pardot-only users from becoming synced users, make sure that the CRM username field on the user record is empty.
- Make sure the users that you want to convert to synced users have the correct value in the CRM username field.

- To make sure that someone at your company can always access Pardot, choose at least one Pardot-only user to have the administrator role.

Finally, notify your users of upcoming changes to their login experience. After Salesforce User Sync is enabled, users log in to Pardot using Log In with Salesforce or the Pardot Lightning app. The user's Salesforce login restrictions also apply to Pardot.

ASSIGN SALESFORCE USERS TO PARDOT

Manage Pardot users without leaving Salesforce by assigning Salesforce users to Pardot. Transfer user management to Salesforce to let your admin assign users to Pardot based on group membership, right from Salesforce Setup.

1. From Setup, in the Quick Find box, enter *Pardot*, then select **Pardot Account Setup**.
2. If you don't have an existing Pardot Business Unit, create one.
3. Click **Manage Users** next to the business unit.
4. Click **Edit User Assignments**.
5. Use the dropdowns to search for and add users to the Marketing Users group and the Sales Users group.
6. Save your changes.
7. (Optional) Click **View All Users** to see a complete list of assigned users.
8. Have a Pardot admin complete Pardot setup.



Warning: To avoid deleting existing Pardot users, finish assigning users in Salesforce before your Pardot admin enables Salesforce User Sync or transfers user management control to Salesforce.

- Enable Salesforce User Sync, if it's not enabled already. When you enable it, your account is opted in to Salesforce-side user management automatically.
- If Salesforce User Sync is already enabled, follow the on-screen instructions for opting in to Salesforce-side user management.

After user management is transferred to Salesforce, your Pardot user assignments are applied in about 10 minutes, and all user management is done in Salesforce.

EDITIONS

Available in: All Pardot Editions

USER PERMISSIONS

To assign Salesforce users to business units:


- Customize Application and Manage Users


To enable Salesforce User Sync or transfer user management to Salesforce:

- Pardot Administrator role

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.
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.


USER PERMISSIONS

To enable Salesforce User Sync:

- **Pardot Administrator** role

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

USER MANAGEMENT WITH SALESFORCE USER SYNC

Salesforce User Sync simplifies how you create, edit, and delete users. Keep this information handy for ongoing user management.

 **Note:** If Salesforce User Sync was enabled in your account before Summer '20, and you haven't transferred user management control to Salesforce, see [Considerations for Accounts with Salesforce User Sync Enabled Before Summer '20](#). User management works differently in your account.

Creating Users

Create users in Salesforce. When you assign a user to Pardot from Salesforce, a Pardot user is created.

- By default, all assigned users inherit the Pardot Marketing role, except in a few cases:
 - The Salesforce System Administrator profile is mapped to the Pardot Administrator role.
 - The admin used to create a Pardot account or business unit has their Salesforce profile mapped to the Pardot Administrator role.
 - Users that are assigned to the Sales User group inherit the Pardot Sales role.
 - All other Salesforce profiles are mapped to the Pardot Marketing role.

Editing Users

Use the View dropdown above the Pardot user table to see which of your Pardot users are synced or Pardot-only. Pardot user preferences are managed in Pardot. Pardot-only users are managed in Pardot.

Most user record fields sync between Pardot and Salesforce. Synced fields are managed in Salesforce, and unsynced fields are managed in Pardot.

Profile-to-role mapping is controlled in Pardot.

Synced Fields	Unsynced Fields
First Name	HTML Email Signature
Last Name	Text Email Signature
Job Title	Tags
Phone	URL
Email	Role
Time Zone	
Locale	
Language	

Deleting Users

Pardot-only users are deleted in Pardot. To delete a synced user, mark them as inactive in Salesforce. Marking a Salesforce user as inactive sends the corresponding Pardot user record to the recycle bin. If the user is made active again in Salesforce, the Pardot user is unarchived, too.

To remove a synced user from Pardot, unassign them in Salesforce. The Pardot user is sent to the recycle bin.

When a Pardot user is deleted, it affects Pardot automations and emails. Emails set to send from the deleted user continue to send from the deleted user's email address. Automation rules, engagement programs, and completion actions that are set to notify or assign a deleted user don't fire.

Pardot administrators aren't notified when a Salesforce user is unassigned, so make sure that the Salesforce admin communicates user changes in Salesforce.