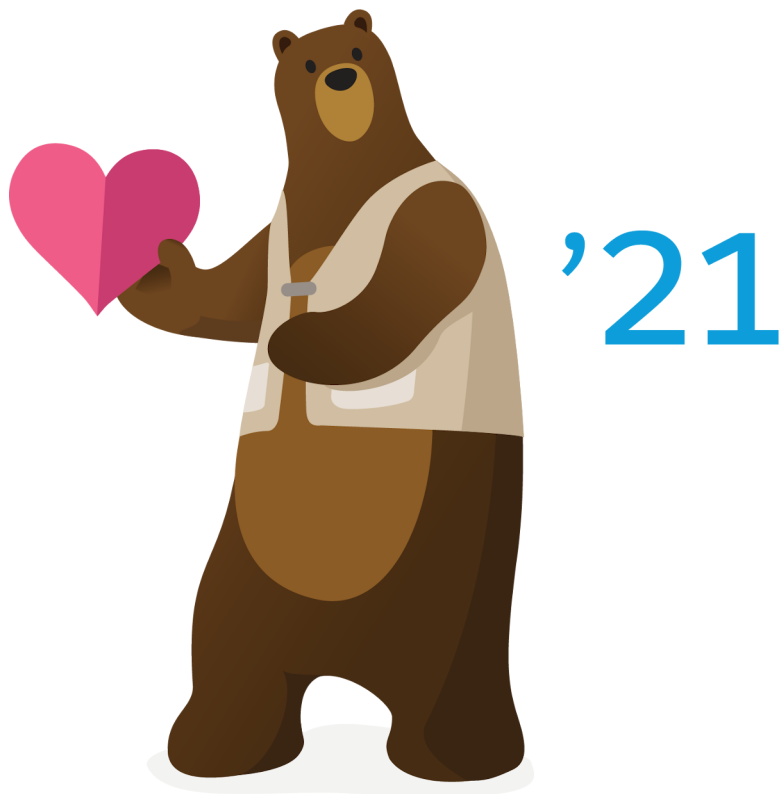




Engagement History Implementation Guide

Salesforce, Spring '21



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USE ENGAGEMENT HISTORY

Your campaigns track valuable engagement data that can tell you how well your marketing assets resonate with your customer base. Turn on Engagement History in Salesforce and choose where to surface this valuable data in the form of fields, related lists, and data visualization.

Prerequisites for Engagement History Features

- Engagement History requires a verified Salesforce-Pardot connector.
- Connected Campaigns must be enabled for most features. When campaigns aren't connected, values show 0.

Setup and Storage

- ❗ **Important:** The name Engagement History can refer to a few different features. All features are available in all Pardot editions, but the Engagement History Dashboard feature requires an Analytics View Only Embedded App permission set.
- Assets associated with connected campaigns are stored as records in Salesforce and apply to storage limits. Engagement activity metrics on these assets remain in Pardot, and don't count toward Salesforce storage limits.
- The data inside Engagement History Dashboards originates from Pardot, and is pushed into Einstein Analytics. This data doesn't count toward Salesforce storage limits, but records do count toward Einstein Analytics data row limits.
- For Growth Edition, Engagement History can sync up to 90 days or 10 million rows of data, whichever comes first. For Plus Edition and Advanced Edition where B2B Marketing Analytics and the Prospect and Activity Dataset are enabled, these features can sync up to 3 years or 35 million rows in total.
- Engagement History metrics are refreshed every few minutes, typically less than 10. Engagement History Dashboard data is refreshed every 8 hours.
- Engagement history data in the custom Lightning component is visible in Salesforce, but isn't available for reports. To see the most up-to-date information reload the page.
- For help with setting up Engagement History features, Pardot Admins can use the assistant in Salesforce Setup.

EDITIONS

Available in: Lightning Experience

Available in: Pardot **Growth, Plus, Advanced,** or **Premium** Editions with Salesforce **Essentials, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

USER PERMISSIONS

To use Engagement History:

- CRM User, Sales Cloud User, or Service Cloud User permission set

Comparison Chart of Engagement History Features

Objects marked with an asterisk (*) show engagement history data by default.

Feature	Available On...	Storage	Prerequisites
Metrics Fields	<ul style="list-style-type: none">• Campaign• Marketing Link*• Marketing Form*	Salesforce	<ul style="list-style-type: none">• Connected Campaigns• CRM User, Sales User, or Service User permission set

Use Engagement History

Feature	Available On...	Storage	Prerequisites
	<ul style="list-style-type: none"> • Landing Page* • List Email 		<ul style="list-style-type: none"> • Field-level security: Access to engagement history metrics
Related List (Metrics)	Campaign	Salesforce	CRM User, Sales User, or Service User permission set
Related List (Activities)	<ul style="list-style-type: none"> • Lead • Contact • Account • Person Account • List Email • Marketing Link* • Marketing Form* • Landing Page* 	Pardot	<ul style="list-style-type: none"> • CRM User, Sales User, or Service User permission set • Logged into Pardot
Engagement History Metrics Lightning Component	Campaign	Salesforce	<ul style="list-style-type: none"> • Connected Campaigns • CRM User, Sales User, or Service User permission set • Logged into Pardot
Engagement History Custom Lightning Component	<ul style="list-style-type: none"> • Lead • Contact • Person Account 	Pardot	N/A
Engagement History Dashboard Lightning Component	<ul style="list-style-type: none"> • Campaign • Account • Lead • Contact • Person Account • Opportunity 	Einstein Analytics platform This data is updated every 8 hours.	<ul style="list-style-type: none"> • Pardot permission set • Connected Campaigns

[Using Engagement History Metrics](#)

Use Engagement History metrics as fields on a connected campaign record or to build a custom report. You can also surface metrics on list views for campaigns, marketing form, marketing link, landing pages, and list emails. These tools can help you determine which marketing assets are most effective.

[Using Engagement History Related Lists](#)

Related lists bring a lot of valuable information together. Add Engagement History's related lists to your records to find the relationships that grow among campaigns, prospects, assets, and more.

[Report on Engagement History Data](#)

Engagement History gives you access to prospect engagement data in Salesforce. To better understand this data, create a custom report that contains engagement metrics alongside campaign and opportunity data. There are five common custom report types we recommend for reporting on Pardot assets, and you can choose which sections to include for your layouts.

[Using Engagement History Lightning Components](#)

To really get the most out of your Salesforce-Pardot connection, check out the Lightning components for Salesforce and the Pardot Lightning app. Display great-looking metrics, charts, and graphs that are filled with valuable details users can explore every day.

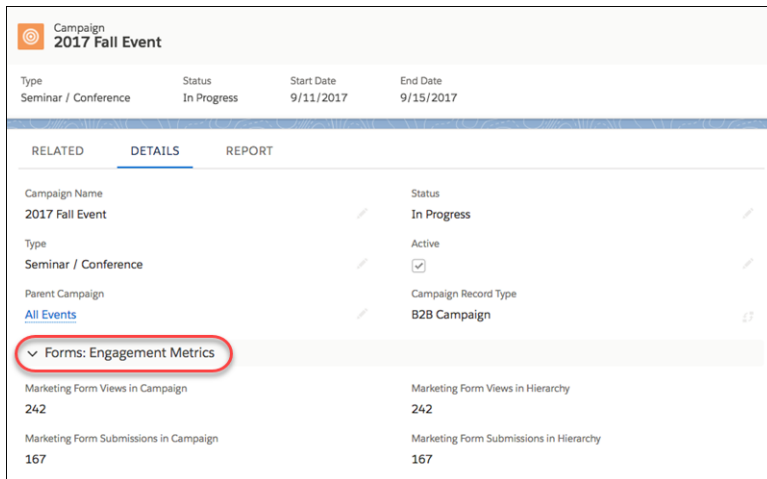
[Resources](#)

Find out more about how to use Engagement History and reports.

Using Engagement History Metrics

Use Engagement History metrics as fields on a connected campaign record or to build a custom report. You can also surface metrics on list views for campaigns, marketing form, marketing link, landing pages, and list emails. These tools can help you determine which marketing assets are most effective.

Engagement History metrics do not include filtered activities. Metrics fields appear by default on marketing asset records. To see the values on campaigns, add fields to your page layouts.



EDITIONS

Available in: Salesforce **Professional, Enterprise, Performance,** and **Unlimited** Editions with Pardot **Growth, Plus, Advanced,** or **Premium** Edition

USER PERMISSIONS

To view Engagement History metrics:

- CRM User, Sales Cloud User, or Service Cloud User

Available fields for each asset type are listed in this table.

Salesforce Object	Associated Pardot Asset	Available Metrics
List Email	List emails and automated email (operational emails excluded)	<ul style="list-style-type: none"> • Total Delivered • Delivery Rate • Total Soft Bounced • Total Hard Bounced • Total Opens • Unique Opens • Open Rate Click Through Rate • Unique Click Through Rate

Salesforce Object	Associated Pardot Asset	Available Metrics
		<ul style="list-style-type: none"> • Click to Open Ratio • Unique Opt Outs • Opt Out Rate • Total Spam Complaints • Spam Complaint Rate • Total Tracked Link Clicks • Unique Tracked Link Clicks
Landing Page	Landing pages	<ul style="list-style-type: none"> • Total View • Unique Views • Total Form Submissions • Unique Form Submissions • Form Submission Rate • Total Form Errors • Unique Form Errors • Form Error Rate • Total Tracked Link Clicks • Unique Tracked Link Clicks
Marketing Link	Files and custom redirects	<ul style="list-style-type: none"> • Total Tracked Link Clicks • Unique Tracked Link Clicks
Marketing Form	Forms and form handlers	<ul style="list-style-type: none"> • Total View • Unique Views • Total Form Submissions • Unique Form Submissions • Form Submission Rate • Total Form Errors • Unique Form Errors • Form Error Rate • Total Tracked Link Clicks • Unique Tracked Link Clicks
Campaigns	N/A	<p>Two sets of these fields are available—to reflect the campaign and the campaign hierarchy.</p> <ul style="list-style-type: none"> • Total Emails Delivered (via List Email object) • Unique Email Opens (via List Email object) • Unique Email Tracked Link Clicks (via List Email object) • Total Form Views (via Marketing Form object)

Salesforce Object	Associated Pardot Asset	Available Metrics
		<ul style="list-style-type: none"> Total Form Submissions (via Marketing Form object) Unique Marketing Link Clicks (via Marketing Link object) Total Landing Page Views (via Landing Page object) Total Landing Page Form Submissions (via Landing Page object)

Using Engagement History Related Lists


Related lists bring a lot of valuable information together. Add Engagement History's related lists to your records to find the relationships that grow among campaigns, prospects, assets, and more.

 **Note:** Engagement History metrics do not include filtered activities.

Marketing Assets

Place marketing assets related lists on your campaign records to display the metrics you need most. A marketing asset related list displays the columns that reflect the performance indicators for that asset type. For example, sends and opens for a list email, or views and form submissions for a landing page.

To use them, drag the related lists called **Landing Page**, **List Email**, **Marketing Form**, and **Marketing Link** in your page layout.

 **Note:** The List Email related list also contains automated emails that originate from Engagement Studio, completion actions, or automation rules. Operational emails aren't included. To see which engagement program an email was sent from, add the Program Name column to the related list.

EDITIONS

Available in: Salesforce **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions with Pardot **Growth**, **Plus**, **Advanced**, or **Premium** Edition

Engagement History

By default, granular activity data appears in a related list on list email, marketing link, marketing form, and landing page records. You can also add this activity list to lead, contact, account, and person account records to see which assets your prospects engage with.

To show this activity data, drag the **Engagement History** related list to a tab on your page layout. We recommend placing it on a tab that doesn't load by default—a long list can affect page load speed.

This related list shows the last 30 days of data and presents different data fields depending on the object that displays it.

The Engagement History related lists are localized according to each user's Pardot locale setting. When using Salesforce User Sync, related lists are localized to the user's Salesforce org's locale setting.

Object	Available Fields
Account	<ul style="list-style-type: none"> Prospect Asset Name Asset Type Activity Type Activity Date

Object	Available Fields
Lead, Contact, Person Account	<ul style="list-style-type: none"> Asset Name Asset Type Activity Type Activity Date
List Email, Marketing Form, Marketing Link, Landing Page	<ul style="list-style-type: none"> Prospect Activity Type Activity Date

Report on Engagement History Data

Engagement History gives you access to prospect engagement data in Salesforce. To better understand this data, create a custom report that contains engagement metrics alongside campaign and opportunity data. There are five common custom report types we recommend for reporting on Pardot assets, and you can choose which sections to include for your layouts.

Refer to the following lists to configure each custom report type, and use the steps to build the reports you want.

1. From Salesforce Setup, enter *Report* in the Quick Find box, and then select **Report Types**.
2. Click **New Custom Report Type**.
3. In the Fields Available for Reports section, click **Edit Layout**.
4. In the Field Layout Properties section, click **Create New Section**.
5. Give the section a title, and then drag the fields as outlined by the asset types listed here.

Campaigns Engagement

Primary Object: Campaigns

Section 1: Campaigns

Section 2: Parent Campaigns

Landing Pages Engagement

Primary Object: Landing Page

Relationship: A record has at least one B record

Section 1: Landing Pages

Section 2: Campaigns

Section 3: Parent Campaigns

List Emails Engagement

This report includes any list email sent from Pardot or Sales Cloud. To include only emails sent from Pardot, filter the report with the From Address "Pardot Marketing Automation."

Primary Object: List Email

Relationship: A record has at least one B record

EDITIONS

Available in: Salesforce **Professional, Enterprise, Performance,** and **Unlimited** Editions with Pardot **Growth, Plus, Advanced,** or **Premium** Edition

USER PERMISSIONS

To create reports:

- Sales, Service or CRM permission set
- AND
- Create and Customize Reports
- AND
- Report Builder

Section 1: List Emails

Section 2: Campaigns

Section 3: Parent Campaigns

Marketing Forms Engagement

This report includes data associated with any form and form handler in Pardot. To show only forms or form handlers, add a filter on the Type field.

Primary Object: Marketing Form

Relationship: A record has at least one B record

Section 1: Marketing Forms

Section 2: Campaigns

Section 3: Parent Campaigns

Marketing Links Engagement

This report includes data associated with any custom redirect or file in Pardot. To show only redirects or files, add a filter on the Type field.

Primary Object: Marketing Link

Relationship: A record has at least one B record

Section 1: Marketing Links

Section 2: Campaigns

Section 3: Parent Campaigns

Using Engagement History Lightning Components

To really get the most out of your Salesforce-Pardot connection, check out the Lightning components for Salesforce and the Pardot Lightning app. Display great-looking metrics, charts, and graphs that are filled with valuable details users can explore every day.

These Lightning components are available to help you surface the right data to the right users. They have similar names and are located in different places, so be sure to review the information here.

Engagement History Custom Lightning Component

To show recent engagement with marketing assets, add the custom component to your lead, contact, and person account records. This component comes with your Pardot AppExchange package.

- **Label:** Engagement History
- **Appears in:** Custom - Managed section

View a list of tracked activities in the [Engagement History Lightning Component Activity Glossary](#).

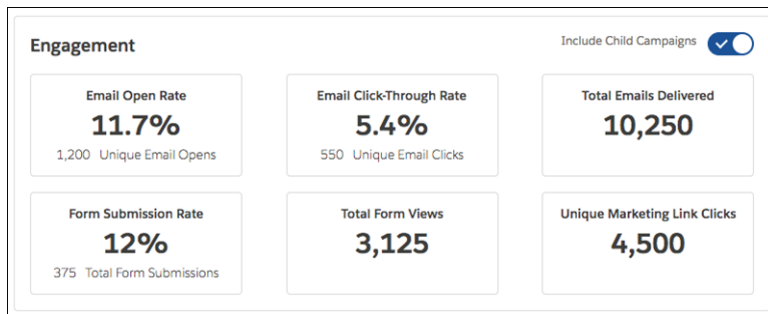
Engagement History Metrics Lightning Component

Add this component to your campaign records to show high-level metrics associated with the marketing assets in your connected campaigns.

EDITIONS

Available in: Salesforce **Professional, Enterprise, Performance,** and **Unlimited** Editions with Pardot **Growth, Plus, Advanced,** or **Premium** Edition


- **Label:** Engagement Metrics
- **Appears in:** Standard section



Engagement History Dashboard Lightning Component

To give users access to data visualizations so that they can explore engagement metrics, add the Engagement History Dashboard component to your campaign and account records.

- **Label:** Engagement History Dashboard
- **Appears in:** Standard section

 **Note:** Engagement History dashboards aren't supported in Pardot Sandboxes.

[Engagement History Lightning Component Activity Glossary](#)

These prospect activities appear in the Engagement History Lightning component. The component doesn't show activities for archived prospects.

[Engagement History Dashboard](#)

An Engagement History Embedded Dashboard gives sales and marketing users the power to explore and visualize important data. Embed an Engagement History Dashboard component on your records to surface valuable metrics for your front-line users. Choose to add a dashboard to campaign, account, lead, contact, person account, or opportunity records. The dashboard shows widgets that are tailored to each type of record.

Engagement History Lightning Component Activity Glossary

These prospect activities appear in the Engagement History Lightning component. The component doesn't show activities for archived prospects.

Activity	Description
AddThis Share	Prospect clicked an AddThis icon in an email and shared your marketing content.
Tracked Link Clicked	Prospect clicked a tracked link. Includes custom redirects and tracked links in emails, thank you content, and social messages.
Email Hard Bounce	Email sent to the prospect hard bounced due to an invalid email address. The prospect was automatically marked Do Not Email. If your account allows multiple prospects with the same email

Activity	Description
	address, prospect records show a bounce if a prospect with the same email address bounces.
Email Open	Prospect opened an email.
Email Resubscribe	Prospect resubscribed to emails from the unsubscribe page.
Email Sent	Prospect was sent an email.
Email Soft Bounce	Email sent to the prospect soft bounced due to the prospect's mail server being unavailable. The prospect is still mailable, but is marked Do Not Email after five soft bounces. If your account allows multiple prospects with the same email address, the prospect record shows a bounce if a prospect with that email address bounces.
Email Spam Complaint	Prospect reported spam from the prospect's email client. This prospect is marked Do Not Email.
Email Unsubscribe	Prospect clicked unsubscribe in a Pardot email or unsubscribed from an Email Preference Center. If your account allows multiple prospects with the same email address, prospect records show an unsubscribe if a prospect with that email address unsubscribes.
Email Preferences Open	Prospect viewed an email preference page.
Form View	Prospect viewed a form or form handler.
Form Error	Prospect had an error when submitting a form or form handler. Errors are often due to the prospect leaving a field blank or submitting invalid information.
Form Success	Prospect successfully submitted a form or form handler, including forms on landing pages.
Landing Page View	Prospect viewed a landing page.
File Accessed	Prospect clicked a link to a non-image file hosted by Pardot.
Olark Live Chat	Prospect contacted one of your users through the Olark live chat connector, and the chat conversation was recorded.
Opportunity Associated	Opportunity was associated with this prospect.
Opportunity Created	Opportunity was created for this prospect.
Opportunity Lost	Opportunity for this prospect was lost.
Opportunity Won	Opportunity for this prospect was won.
Priority Page View	Prospect viewed a priority page.
Site Search	Prospect searched for a term on your website's site search. The search term is also listed in the activity.
Wistia Video Viewed	Wistia video played or viewed.

Activity	Description
Website Visit	A prospect's visitor session. Includes the number of pages viewed during the session and referrer information.
Webinar Attended	Prospect attended a webinar via GoToWebinar, WebEx, or ReadyTalk.
Webinar Registered	Prospect registered for a webinar via GoToWebinar, WebEx, or ReadyTalk.
Webinar Invited	Prospect invited to a webinar.
Webinar Accepted	Prospect accepted webinar invitation.
Webinar Absent	Prospect absent from a webinar that the prospect registered for via GoToWebinar, WebEx, or ReadyTalk.
Event Registered	Prospect registered for an event.
Event Attended	Prospect attended an event.
Natural Search	Prospect visit resulting from natural search.
Paid Search	Prospect visit resulting from paid search.

Engagement History Dashboard

An Engagement History Embedded Dashboard gives sales and marketing users the power to explore and visualize important data. Embed an Engagement History Dashboard component on your records to surface valuable metrics for your front-line users. Choose to add a dashboard to campaign, account, lead, contact, person account, or opportunity records. The dashboard shows widgets that are tailored to each type of record.

[Considerations for Engagement History Dashboard](#)

When you work with Engagement History Dashboards, keep these considerations in mind.

[Turn On Engagement History Dashboards](#)

Start exploring Pardot engagement data on your Salesforce campaign, account, lead, contact, and person account records. Use Marketing Setup to turn on the feature and assign permissions. Then, embed a dashboard by adding the Engagement History Dashboard component to Lightning pages.

EDITIONS

Available in: Salesforce **Professional** (with API access), **Enterprise**, **Performance**, and **Unlimited** Editions with Pardot **Growth**, **Plus**, **Advanced**, or **Premium** Edition

Considerations for Engagement History Dashboard

When you work with Engagement History Dashboards, keep these considerations in mind.

- If you use Professional edition, make sure your org has the API add-on.
- Your Pardot edition determines how many user licenses are allotted for sales and marketing users.
 - Growth: 5
 - Plus: 10
 - Advanced: 20
- The Analytics View Only Embedded App permissions set license gives your sales and marketing users access to analytics data and embedded Engagement History dashboards, but doesn't allow access to Analytics Studio.
- The first sync is always the biggest. Allow more than 24 hours for the initial sync of metrics data. The dataset is then refreshed every 8 hours.
- Embedded analytics dashboards aren't supported in Internet Explorer 11.
- For emails sent through Engagement Studio, the Pardot Engagement History dataset includes send data only for engagement programs that were created after December 14, 2018.

EDITIONS

Available in: Salesforce **Professional** (with API access), **Enterprise**, **Performance**, and **Unlimited** Editions with Pardot **Growth**, **Plus**, **Advanced**, or **Premium** Edition


Using the Opportunity Dashboard

- This dashboard uses activity dates to associate engagement to open opportunities.
- Reference lines only appear when an opportunity has a role assigned or when the opportunity's dates fall within the dataset date range.
- In the Contact widget, contacts with an unassigned contact role are labeled Unspecified. If the contact has no role at all, they're labeled None.


Turn On Engagement History Dashboards

Start exploring Pardot engagement data on your Salesforce campaign, account, lead, contact, and person account records. Use Marketing Setup to turn on the feature and assign permissions. Then, embed a dashboard by adding the Engagement History Dashboard component to Lightning pages.

1. From Marketing Setup, in the Quick Find box, enter *Engagement History* and select **Engagement History**.
2. To turn on Embedded Engagement History Dashboards, follow the steps on the setup page.
3. Using the Lightning App Builder, find the Engagement History Dashboard component and drag it into a tab.

 **Note:** The Engagement History Dashboard component appears in Standard components section.

4. Assign the Analytics View Only Embedded App permission set to each user who wants to see the dashboard.

 **Note:** If your account doesn't have the system users Analytics Cloud Integration User and Analytics Cloud Security User, they're added to your account when you enable the feature.

It can take more than 24 hours for Pardot data to sync the first time. We recommend that you wait for data to appear before you assign access to users.

Resources

Find out more about how to use Engagement History and reports.

- Blog: [How to Report on Marketing Activities with Engagement History](#)
- Knowledge Article: [Five recommended custom report types for Engagement History](#)

EDITIONS

Available in: Salesforce **Professional** (with API access), **Enterprise**, **Performance**, and **Unlimited** Editions with Pardot **Growth**, **Plus**, **Advanced**, or **Premium** Edition

USER PERMISSIONS

To enable Engagement History Dashboards:

- Customize Application

To view Engagement History Dashboards:

- Analytics View Only Embedded App permission set

EDITIONS

Available in: Salesforce **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions with Pardot **Growth**, **Plus**, **Advanced**, or **Premium** Edition