# Connected Campaigns Implementation Guide

Salesforce, Spring '21


@salesforcedocs

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# CONNECT PARDOT CAMPAIGNS TO SALESFORCE CAMPAIGNS

It's a great idea to connect your Pardot and Salesforce campaigns. You can save time, reduce clutter, and get access to valuable cross-product features. For example, work with campaign influence attribution models, Engagement History, and Pardot Einstein Campaign Insights for a complete view of your business. Plus, you can work with Pardot prospects and data without leaving Salesforce.

Streamline how you provide multifaceted campaign data to sales and marketing teams by connecting your Salesforce and Pardot campaigns. As a prospect interacts with the marketing assets on a Pardot campaign, metrics are pushed to its equivalent Salesforce record. From here, marketers can track campaign influence, and sales users can clearly see the prospect's journey to becoming an opportunity.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: All Pardot Editions with Salesforce **Essentials**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Considerations for Connecting Pardot and Salesforce Campaigns

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Connect Existing Pardot Campaigns to New Salesforce Campaigns with Workbench

You can use Workbench to connect multiple existing Pardot campaigns to Salesforce at one time.

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### Requirements

- Connected Campaigns requires a verified Salesforce-Pardot connector and an admin to enable the feature.
- To connect campaigns or to work with connected campaigns, Pardot users log in to Salesforce.
- For the best experience, we recommend that you don't turn off Connected Campaigns after you turn it on.
- To connect multiple Pardot orgs to a single Salesforce org, enable different campaign record types for each Pardot account.

- If you have a Pardot campaign that doesn't have an equivalent Salesforce campaign, create the campaign in Salesforce before you enable Connected Campaigns.

## About Record Types

- Use record types with Connected Campaigns to limit which counterpart campaigns are created in Pardot. In the Connected Campaigns settings, you can choose to not connect some record types, if they aren't needed.
- For best performance, use record types to sync only the campaigns you expect to connect frequently. It takes time to load all the campaigns in the menu you use to connect CRM campaigns—the fewer campaigns to choose from, the better.
- The Master record type is the default record type for new records. To avoid creating unnecessary Pardot campaigns, we don't recommend that you choose this record type. Work with your Salesforce Admin to create alternate record types if needed.

## After You Connect Campaigns

The setup process includes three general steps: enable the feature, make a plan and connect existing campaigns, and turn over campaign management to Salesforce. After the last step, start creating all your campaigns in Salesforce only. A connected Pardot campaign is created automatically.

You also see the following changes in your org.

- When a Salesforce campaign connects to a Pardot campaign, Salesforce replaces the values of the following Pardot campaign fields.
  - Name
  - Archive Date (maps to End Date on Salesforce campaigns)
  - Cost
  - Created By
  - Updated By
  - Updated At

  Note: You can't undo the field value replacement.

- Salesforce copies marketing forms, marketing links, and list emails from Pardot campaigns to their connected Salesforce campaigns. This data counts against your company's data storage limits.
- Engagement History features and the Multi-Touch Attribution Dashboard in B2B Marketing Analytics become available in Salesforce.

When campaigns are connected, you manage your Pardot campaigns differently.

- You use only Pardot campaigns that you have connected to a Salesforce campaign.
- The Pardot campaign record becomes read-only. Create campaigns from the Salesforce Campaigns tab.
- The Connect to CRM Campaign action no longer appears on the Pardot Campaigns page.

Note: To support Pardot features available within Sales Cloud, Salesforce added a user called B2BMA Integration User to all Salesforce customers who also have Pardot. This new user is read-only, doesn't affect your Salesforce license usage, and can't access or update data by default. If you choose to opt in to the new Pardot features available in Sales Cloud, this user enables campaign and engagement data to flow between your Pardot org and your Salesforce org. This flow can include copying records from Pardot to Salesforce and vice versa.

# Enable Connected Campaigns

When you enable Connected Campaigns in your Pardot Settings, decide which record types you want to connect from now on.

Before you enable the feature or begin connecting campaigns, we recommend that you outline how your campaigns relate to each other. Consider the following tasks. For best results, make sure that every campaign you want to use has a counterpart.

- Identify the Pardot campaigns that you want to keep. Do their equivalent Salesforce campaigns exist?
- Identify the Salesforce campaigns that you want to keep. Do their equivalent Pardot campaigns exist?
- Identify which Pardot campaigns, if any, must stay in Pardot only.
- Create record types or assignments to organize your campaigns.

When the preparation is complete, head over to Settings and get started with Connected Campaigns.

Note:

- The Pardot B2BMA Integration user does not need the Pardot Marketing User role to enable and work with Connected Campaigns.
- Make sure that you create counterpart campaigns in Salesforce for Pardot's default and required campaigns, including Website Tracking and Salesforce Sync. If you aren't using the Email Plug-in campaign, delete it before you connect.
- A Pardot campaign is updated or created each time the Salesforce campaign is edited by a person or process. To limit the number of campaigns created in Pardot, identify a cut-off date for replication.

1. Open the Connected Campaigns page.
   - In Pardot, open **Settings** and click **Edit**. Scroll to Connected Campaigns.
   - In the Lightning app, click the **Pardot Settings** tab, and then select **Connectors**. Click to edit the Salesforce connector, and select the **Campaigns** tab.
2. Select **Enable Connected Campaigns and Engagement History**.
3. Select the Salesforce campaign record types that can be connected.
4. Save your work.

The previous steps prepare your org for the alignment stage of setup. Unconnected campaigns continue to show in both places. Now, your marketing team can connect campaigns individually or in bulk.

After they're done, complete the Connected Campaigns setup process by giving Salesforce access to manage the campaigns.

1. In the same connector settings, select **Use Salesforce to manage all campaigns**.
2. If you want to reduce the number of campaigns that are replicated over time, enter a date under **Limit Campaign Creation by Date**.
3. To let Pardot users continue to see the remaining unconnected campaigns, select **Show Unconnected Campaigns**.

With the setting enabled, you can manage campaigns only in Salesforce. For details about the changes you can expect to see, read Considerations for Connecting Pardot and Salesforce Campaigns.

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USER PERMISSIONS

To connect Pardot campaigns to Salesforce campaigns:

- General Account Administration

  AND

  Pardot Marketing User role

  AND

  B2B Marketing Automation App permission set license

# Connect Individual Pardot and Salesforce Campaigns

You can connect individual Pardot and Salesforce campaigns whenever you need to.

1. Open the Pardot Campaigns page.
   - In Pardot, select **Marketing** and then **Campaigns**.
   - In the Lightning app, select **Pardot Campaigns**. This tab isn't visible by default—an admin must add it.
2. Select the **Unconnected Campaigns** view.
3. For the Pardot campaign you want to connect, click **Connect to CRM Campaign** and then select the associated Salesforce campaign.

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# Connect Multiple Pardot and Salesforce Campaigns at Once

The easiest way to audit and organize your campaigns in bulk, is to download our mapping workbook. It contains your campaign names and IDs in three worksheets. Copy and paste values from the Pardot and Salesforce tabs to align the campaigns in the Connect tab. Then, upload the completed file.

If you have a total of more than 500 campaigns, it can take some time to download the workbook. We send an email to notify you when the file is available.

Here are a few tools the workbook offers to help you avoid data-entry errors.

- When a campaign has the same name in both apps and you add it to the Connect tab, the worksheet auto-fills the matching campaign.
- When a row is complete, it turns green.
- When a campaign is added to the Connect tab, its corresponding row is highlighted in its original tab, to indicate it's already been mapped.
- The Salesforce record type isn't required to map campaigns, but it's provided for your reference.
- Sometimes, an associated campaign is aligned automatically, so you can skip over them.

1. Open the Pardot Campaigns page.
   - In Pardot, select **Marketing** and then **Campaigns**.
   - In the Lightning app, select **Pardot Campaigns**. This tab isn't visible by default—an admin must add it.
2. Click **Connect Campaigns with Excel** and download the workbook.
3. In the Pardot tab of the workbook, copy a value from the Name column. Then, paste it into the Pardot Name column of the Connect tab.
4. In the Salesforce tab, copy the associated Salesforce campaign name. Back in the Connect tab, paste the name into the corresponding Salesforce Name field.
5. Delete unused rows from the worksheet.
6. When you're finished aligning all the campaigns you want, upload the file.

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USER PERMISSIONS

To connect Pardot campaigns to Salesforce campaigns:

- General Account Administration

  AND

  Marketing User role

  AND

  B2B Marketing Automation App permission set license

# Connect Existing Pardot Campaigns to New Salesforce Campaigns with Workbench

You can use Workbench to connect multiple existing Pardot campaigns to Salesforce at one time.

1. Open the Pardot Campaigns page.
   - In Pardot, select **Marketing** and then **Campaigns**.
   - In the Lightning app, select **Pardot Campaigns**. This tab isn't visible by default—an admin must add it.
2. Click **Bulk Connect Pardot Campaigns to New Salesforce Campaigns**.

   Salesforce exports the file `NewConnectedCampaigns.csv`, which contains a list of your unconnected Pardot campaigns.
3. If your org has required custom fields for campaigns, add columns to the CSV file for each field name.
4. Log in to https://workbench.developerforce.com with your Salesforce account credentials.
5. Select **Data** > **Insert**.
6. Select **Object** > **Campaign**.
7. Select **From File**.
8. Click **Choose File**, and open the `NewConnectedCampaigns.csv` file.
9. Click **Next**.
10. Workbench prompts you to map Salesforce campaign fields to the Pardot campaign fields in the CSV file. Accept the default mappings. If you added custom field columns to the CSV file, find the field on the left and select the correct CSV column you added.
11. Click **Map Fields**.

    A confirmation page shows the field mappings and the number of new Salesforce campaign records to be created.
12. Click **Confirm Insert**.

Workbench reports the number of campaigns created and any failures. If a campaign fails to create, the reason is listed in the Status column. The newly connected campaigns appear in the Connected Campaigns view on the Pardot Campaigns page after a short wait.

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USER PERMISSIONS

To connect Pardot campaigns to Salesforce campaigns:
- General Account Administration

  AND

  Pardot Marketing User role

  AND

  B2B Marketing Automation App permission set license

# CAMPAIGN MEMBER SYNC

As you connect your Pardot campaigns to Salesforce, decide whether to sync prospects into those campaigns. When you turn on Member Sync for connected campaigns, Pardot prospects appear in Salesforce as campaign members.

EDITIONS

Available in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions and all Pardot Editions



## Considerations for Member Sync

When you work with Member Sync in Pardot and Salesforce, keep these considerations in mind.


EDITIONS

Available in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions and all Pardot Editions


### How It Works

Campaign Member Sync shows your Pardot prospects in Salesforce as campaign members. The sync works only from Pardot to Salesforce, so campaign member changes aren't reflected in associated Pardot campaigns.

Before you can use member sync, Connected Campaigns must be enabled. To sync a prospect, assign it to a Pardot user and associate it with a Pardot campaign.

Synced campaign members show a status of Connected when they originate from Pardot to indicate that their first-touch was from a marketing campaign. If a campaign member is missing or doesn't show a Connected status, verify that the prerequisites for syncing have been met.

- The connector user or integration user has Edit permission on Campaigns
- Marketing User is selected on its Salesforce user record

To add campaign members after the first-touch, use Pardot's automation tools. For more recent marketing engagement activity, view the prospect record in Pardot.

### Other Considerations

- If the prospect shares an email address with another Salesforce contact, the record is synced as a contact. Otherwise, the prospect syncs as a lead.
- When you enable Campaign Member Sync, prospects sync retroactively for campaigns that are already connected.
- Campaign Member Sync doesn't archive or delete lead or contact records from Salesforce. Remove associated records from Salesforce manually.
- The campaign member created date in Salesforce refers to when the prospect was synced, not the creation date in Pardot.
- Campaign Member Sync works alongside other prospect syncing jobs.
- Expect slower sync times when a connected campaign has more than 10,000 prospects.

# Sync Campaign Members

You manage Member Sync in your Pardot account settings. After you turn on Member Sync, you report on campaign members from Salesforce.

Before you turn on Member Sync, make sure that the prospects you want to sync are assigned to users. Next, turn on Connected Campaigns, and then return to Account Settings to enable Member Sync.

1. Open the Account Settings page.
   - In Pardot, click ⚙ and select **Settings**.
   - In the Lightning app, select **Pardot Settings**.
2. Open the Connected Campaigns settings.
   - In Pardot, scroll to Connected Campaigns and click to expand the settings.
   - In the Lightning app, select **Connectors**. Click ⚙ and select **Edit Settings**. Next, click the **Campaigns** tab.
3. Select **Enable Campaign Member Sync**.
4. Save your work.

Allow some time for campaign members to show up in Salesforce campaigns.

EDITIONS

Available in: Salesforce **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions with any Pardot Edition

USER PERMISSIONS

To turn on Member Sync:
- Pardot Administrator role