#PARDREAMIN2021 |
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Customizing Pardot Form Behavior with Javascript

Intermediate | Industry

Karin Tracy
FIONTA

About

Fíonta

- Salesforce.org Premium Partner - Salesforce partner since 2006
- 20+ year history working with nonprofits, foundations, and associations
- Expertise in NPSP, Pardot, Experience Cloud, Fonteva (AMS built on Salesforce)
- Remote-first company with 61 employees (we're hiring!)
- Women-owned, majority-women
- Great Place to Work (officially, not just anecdotally!)

Karin Tracy

- VP, Marketing at Fíonta
- Pardot Consultant and Specialist
- Celebrating 10-year anniversary with Fionta in Jan '22
- Live in downtown Los Angeles with my husband (a Pardot consultant!), two pugs, and two tabby cats
- Popcorn enthusiast, crafter - rarely at the same time

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Let's Set the Stage

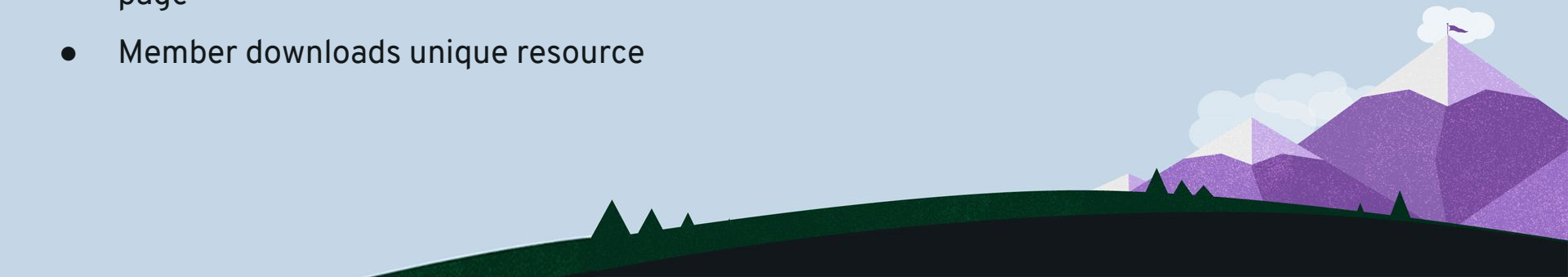
LeadingAge

LeadingAge represents more than 5,000 nonprofit aging services providers and other mission-minded organizations that touch millions of lives every day. A member-based association, LeadingAge has 38 state partners and uses applied research, advocacy, education, and community-building to make America a better place to grow old.

Business Case

Existing process:

- 1 Marketo form
- Embedded on multiple pages of LeadingAge's Member Community
- On submission, form redirect to different URL based on referring page
- Member downloads unique resource



Business Case

Alternate example:

- Crafting website has three sections - knitting, sewing, and embroidery
- Each section has multiple projects
- Every project has a PDF pattern download
- Users fill out one form to download desired pattern
- On completion, they are taken to a page with the PDF pattern they want
- On the back end, both total form completions and downloads of individual patterns can be measured

Without Javascript

LeadingAge would have needed to create and maintain...

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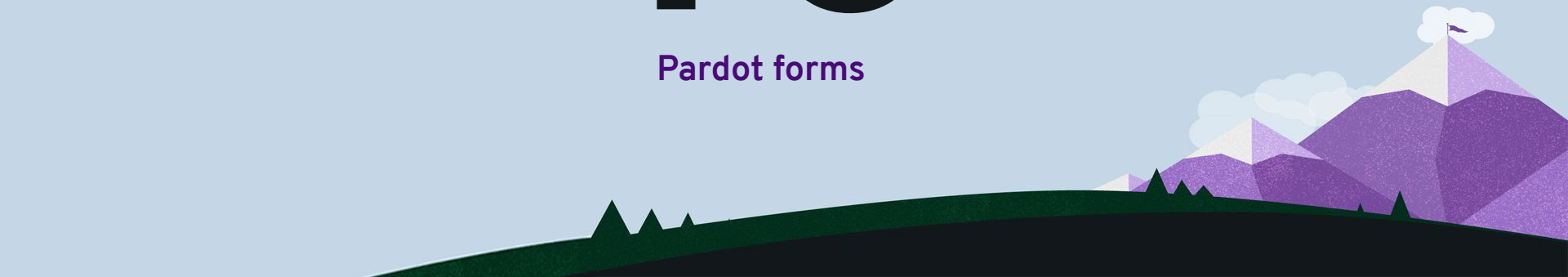
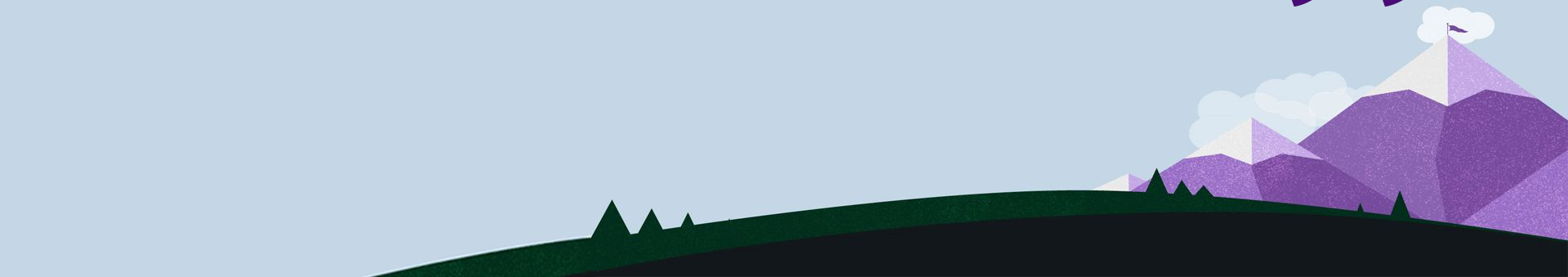
Pardot forms



Um, no thanks.

- Everyone involved in this project



WithJavascript

Cue sounds of magic and delight

1

Pardot form

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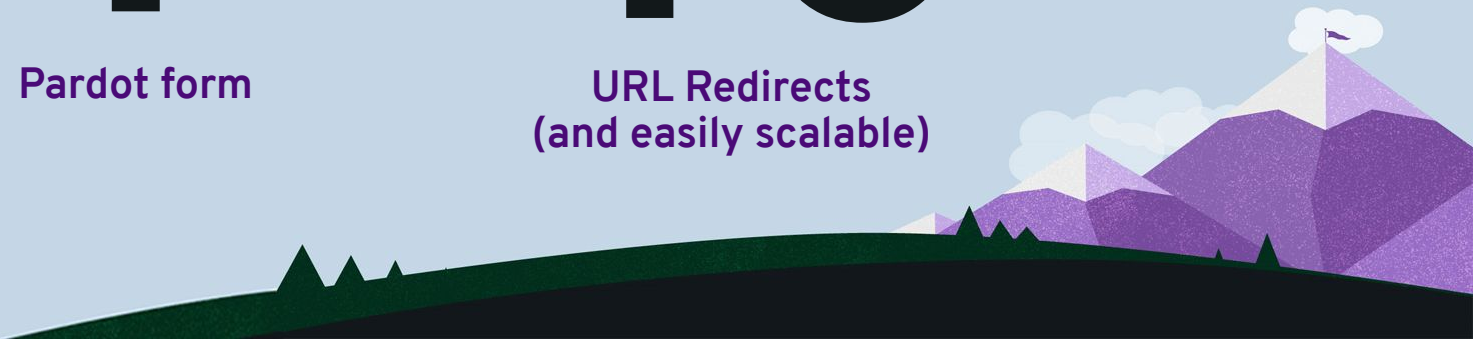
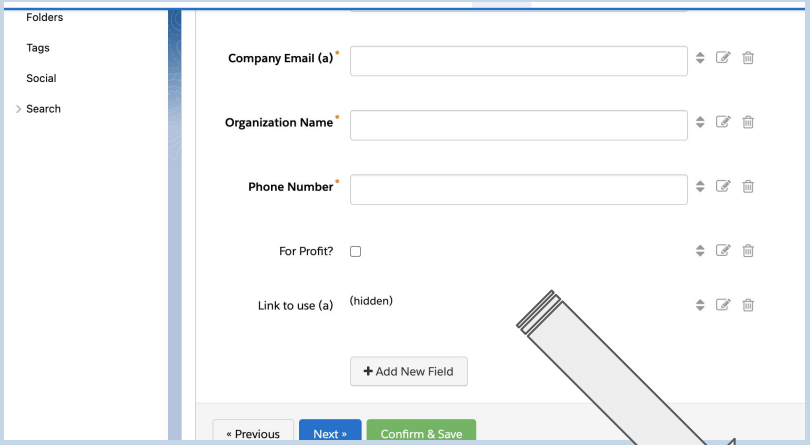
URL Redirects
(and easily scalable)



The deets

“The truth of the story lies in the details”



Added a hidden field to the form

- Mapped to Custom Field on Prospect Record called Link_To_Use
- Script populates hidden field with URL of embedded form page

The code

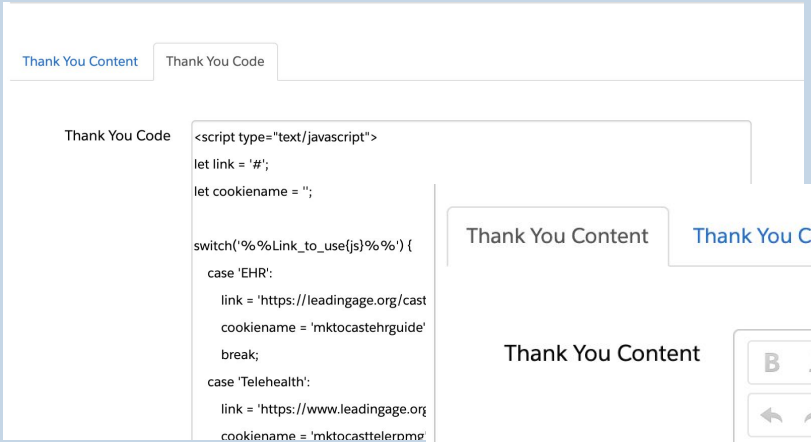
"Simplicity is the soul of efficiency"

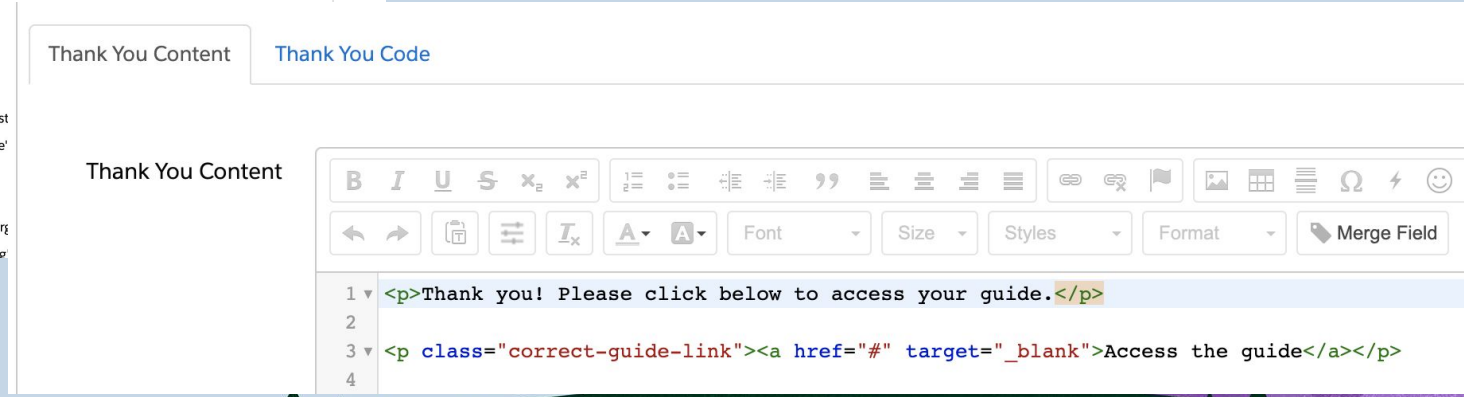
Thank You Code

```
<script type="text/javascript">
let link = '#';
let cookiename = '';

switch('%%Link_to_use{js}%%') {
   case 'EHR':
      link = 'https://leadingage.org/cast-ehr-interactive-guide';
      cookiename = 'mktocastehrguide';
      break;
if (cookiename != '') {
      var now = new Date();
      now.setFullYear(now.getFullYear() + 1);
      document.cookie = cookiename + '=1;expires=' + now.toGMTString() + ';path=/;domain=.leadingage.org;';
}

document.querySelector('.correct-guide-link a').setAttribute("href", link);
</script>
```

The pictures

Because there's no room for 1,000 words...



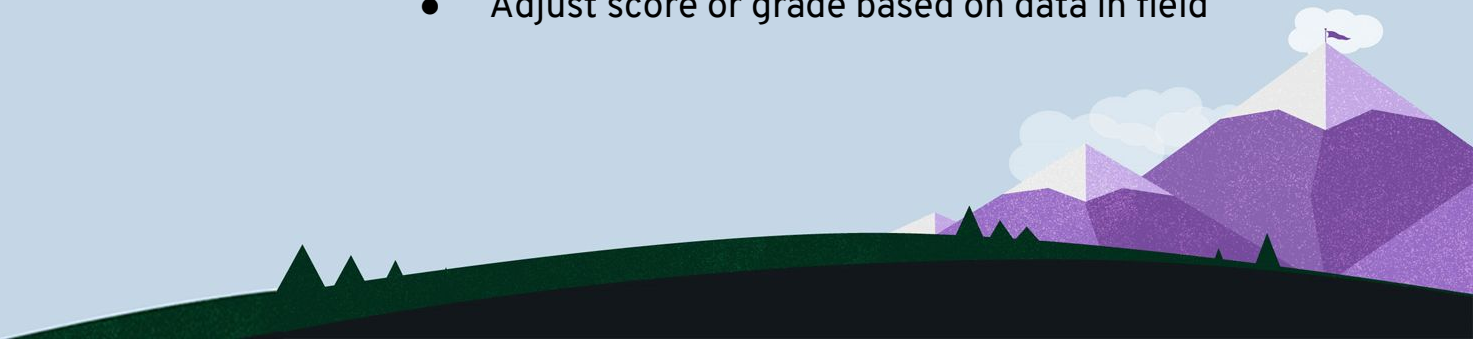


Prospect record - custom field data

Record and reuse

Link to use seltoolmed

- Engagement path (send survey about resource, use form completion and custom field as criteria)
- Build lists for each area of interest
- Automation rule to add tag based on field data
- Send notifications to Users when field is populated
- Adjust score or grade based on data in field



Other Javascript applications

“Javascript is the duct tape of the internet”

- **Change Thank You message** to display alternate versions depending on grade, score, referring URL, other known data
- **Change redirect URL** based on varying field input
- **Add different UTM codes** to redirect URLs based on form selections
- **Change text on button** depending on asset type (Download for a PDF, View now for a webinar)
- **Single form,** multiple completion actions (The Spot for Pardot)
- **Add placeholder text** within Pardot forms (Jenna Molby)

Thanks for listening!

FÍONTA

_fionta

linkedin.com/company/fionta

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