Fancy Things with Query Strings

Intermediate | Admin

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Cypress Learning Solutions

Speaker Agenda

What's going on here?

Time	Agenda	Extra Info
9:55-10:00	Welcome	Who's in the room?
10:00-10:10	What is a Query String?	Web browsing 101
10:10-10:30	Using Query Strings with Pardot	POST to Pardot
10:30-10:50	WebHooks & Special Sauce	Magic is out there

Welcome Poll!

Let’s get to know each other

What is a Query String?

Understanding the basic principles of how web browsing works

What is a Query String?

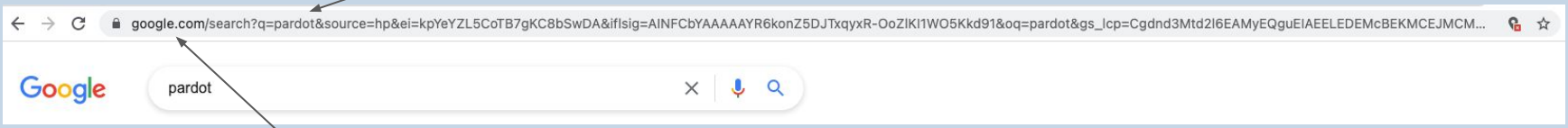
A **query string** is part of a **uniform resource locator (URL)** that assigns values to specific parameters. A query string commonly includes fields added to a base URL by a Web browser or other client application, for example part of an HTML form.

(source: https://en.wikipedia.org/wiki/Query_string)

URL Anatomy 101: What's in the Bar

It's really not that scary!

Anything after the '?' is part of the 'query string'



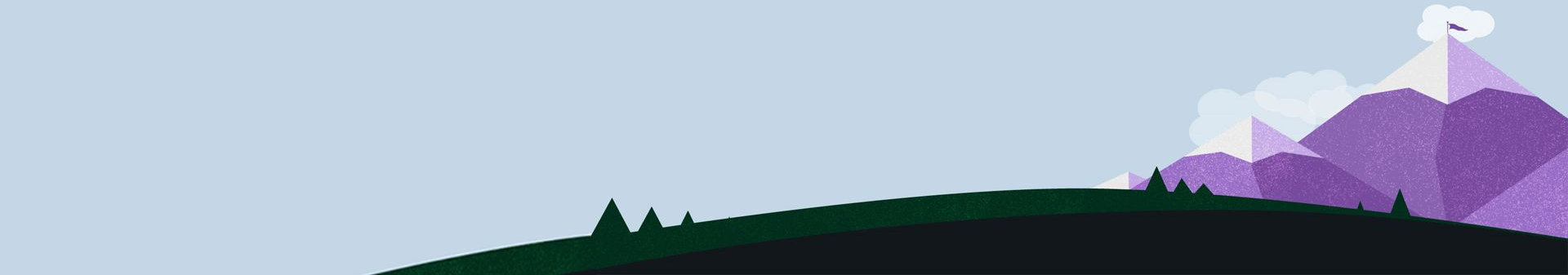
The first part of the URL is the server

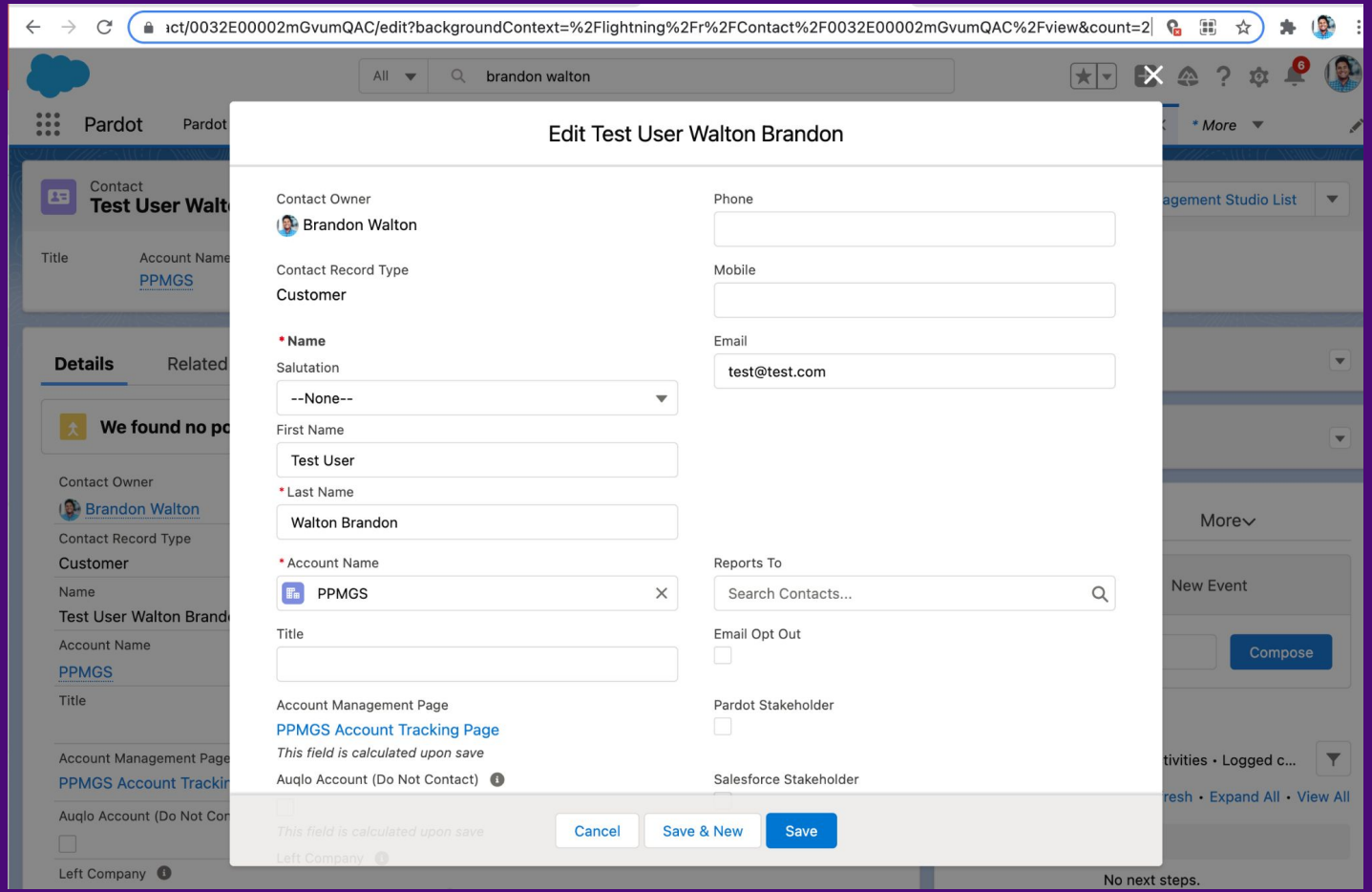
Give it a Shot!

1. In your Web browser, type: https://google.com/search?q=
2. Enter your ‘search’ directly into the address bar.
3. What do you see?

Query Strings in Salesforce

Can you spot the Query string when we click to ‘create’ or ‘edit a record?




Edit Test User Walton Brandon
Contact Owner
Brandon Walton
Contact Record Type
Customer
*Name
Salutation
--None--
First Name
Test User
*Last Name
Walton Brandon
*Account Name
PPMGS
Title
Account Management Page
PPMGS Account Tracking Page
This field is calculated upon save
Auqlo Account (Do Not Contact)
Phone
Mobile
Email
test@test.com
Reports To
Search Contacts...
Email Opt Out
Pardot Stakeholder
Salesforce Stakeholder
Cancel
Save & New
Save

Types of Requests

- **GET Request:** When we make a GET request, we are asking the browser to 'Bring' us information from another computer. When we are browsing the web, we are making GET request to the URL in our address bar.

- **POST Request:** When we SUBMIT information, we are 'Sending' information to another computer. When we submit a form, we are making a POST to a location, typically the 'action=' portion of the form

A Few Fancy Things: Batch #1

This is a fancy Query String. What do you think it does?

https://cdn.statically.io/img/ninjaforms.com/wp-content/uploads/2016/10/Use-Merge-Tags-in-a-Redirect.png?w=926&quality=70&f=auto

1. How many Parameters are part of this Query?
2. What are the Parameters, and what do you think they do?
3. Using your address bar, Change some of the values in the Query String - what happens?
4. What kind of benefits would come from using this?

Using Query Strings with Pardot

Pardot + Query Strings (it's like magic)

Forms

Query Strings can be used to pre-populate your forms with information

A Few Fancy Things: Batch #2

Supercharging our Marketing Attribution with Query Strings:

Let's visit a Pardot form:

https://info.cypresslearning.com/l/698803/2021-03-29/5p8hnl

Now, let's visit the form again with some query string variations:

- https://info.cypresslearning.com/l/698803/2021-03-29/5p8hnl?source=facebook
- https://info.cypresslearning.com/l/698803/2021-03-29/5p8hnl?source=instagram
- https://info.cypresslearning.com/l/698803/2021-03-29/5p8hnl?source=tiktok

1. **How do the query string variations differ from the original form url?**
2. **What kind of benefits would come from using this?**

Landing Pages

Query Strings can be used to pre-populate your Landing Page forms with information

A Few Fancy Things: Batch #3

Does it work with Landing Pages? Yep. Let's check it out:

Let's visit a Pardot Landing Page:
https://go.trailhead.guide/trailhead-discount-opt-in

Now, let's visit the page again with some query string variations:

- https://go.trailhead.guide/trailhead-discount-opt-in?company=Cypress
- https://go.trailhead.guide/trailhead-discount-opt-in?email=brandon@cypresslearning.com&company=Cypress

1. **How do the query string variations differ from the original form url?**
2. **What kind of benefits would come from using this?**

Form Handlers

Query Strings can be used to pre-populate your form handlers with information

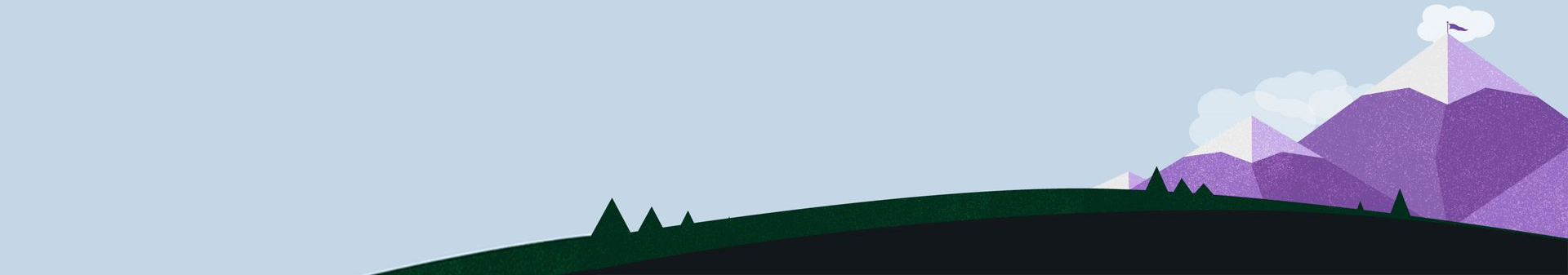
(more on this later…)

Webhooks & Special Sauce

Can you taste it?

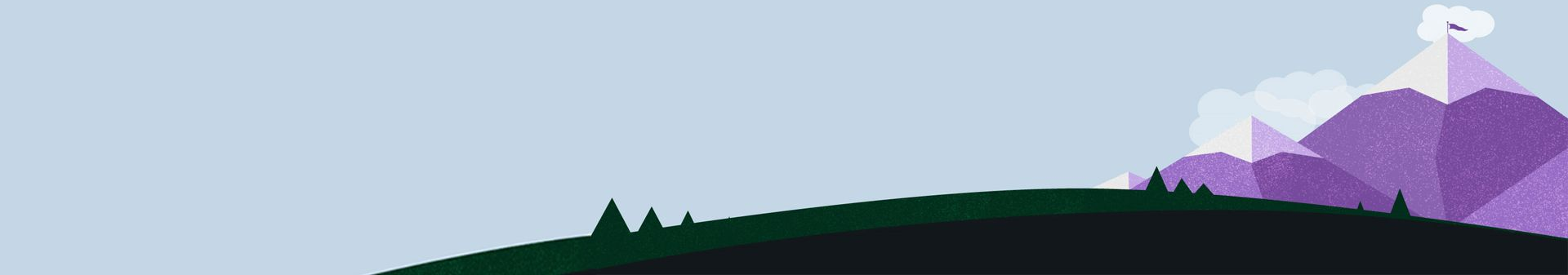
If your Company is on Pardot GROWTH

No Pardot API - NO WORRIES!



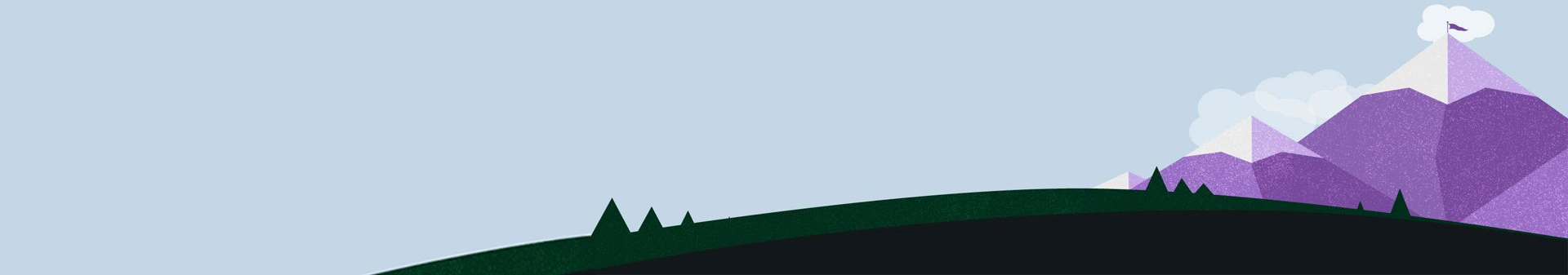
Did you know that Form Handlers work as a great ‘API’ solution?

https://go.pardot.com/l/698803/this-is-not-real-/77klsh?email={{email}}

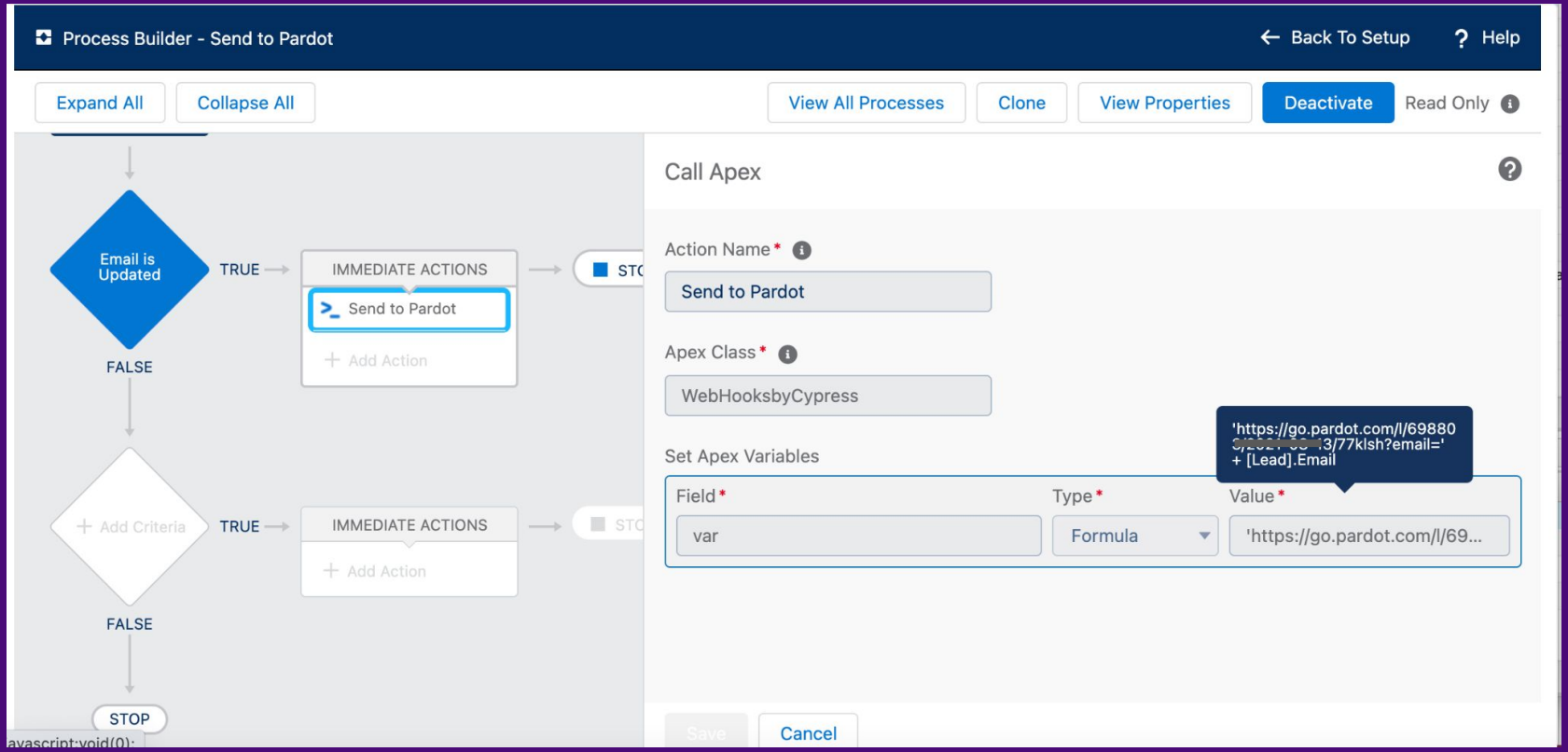


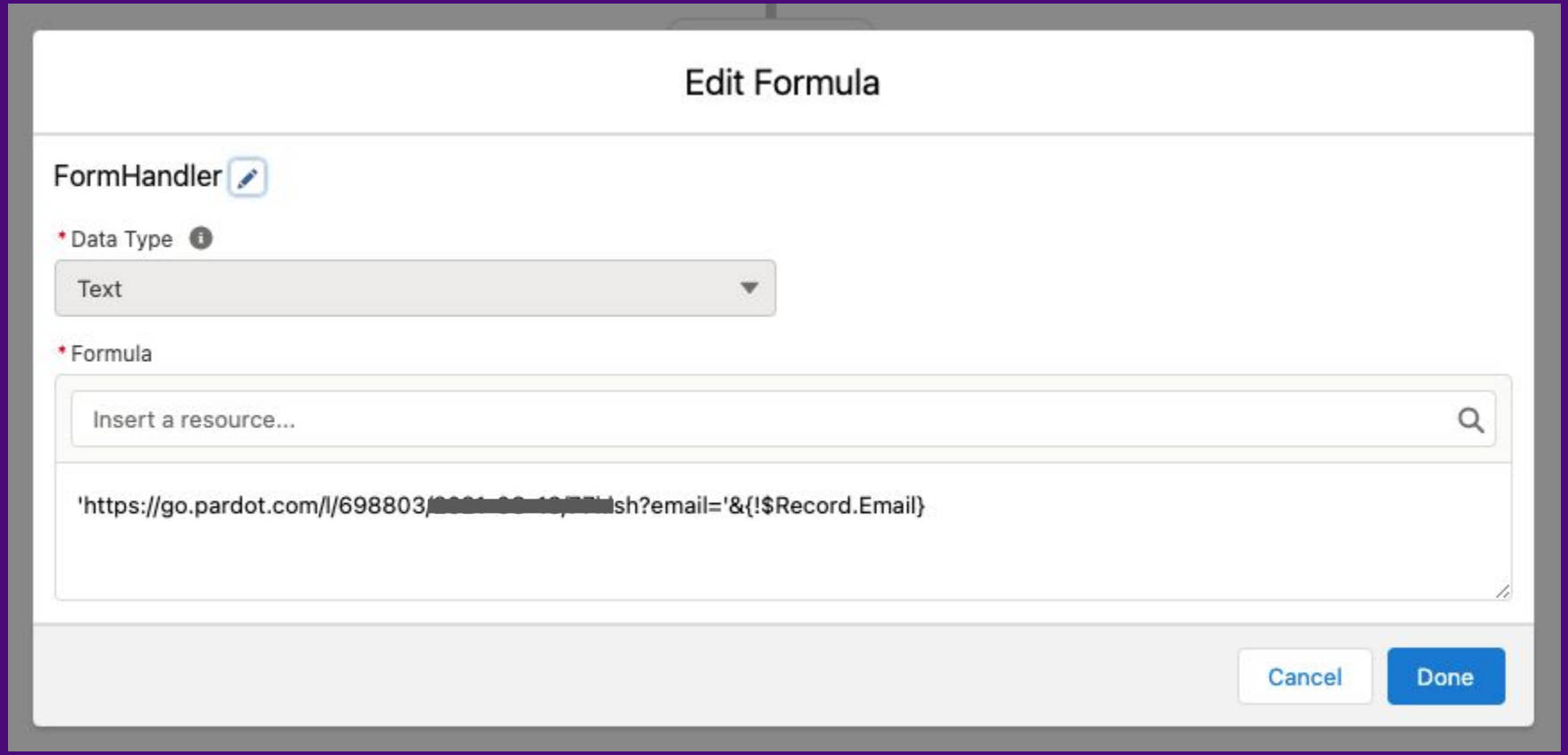
Form Handler ‘Edge’ Cases/Creative Usages:

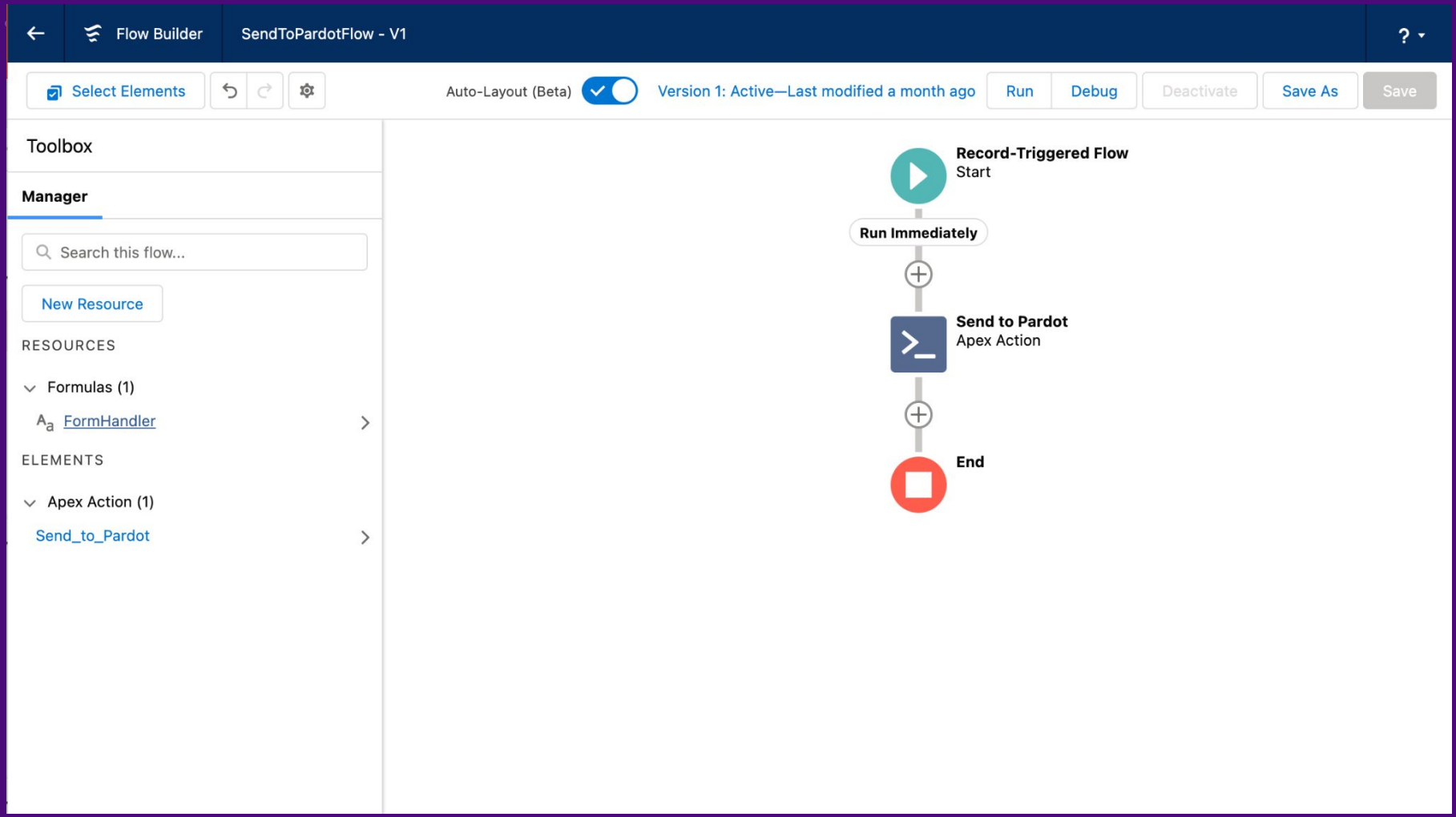
- Create personalized Experiences from Email links
- Use Pardot with tools like Zapier using Webhooks (without needing the Pardot API)
- ...and!

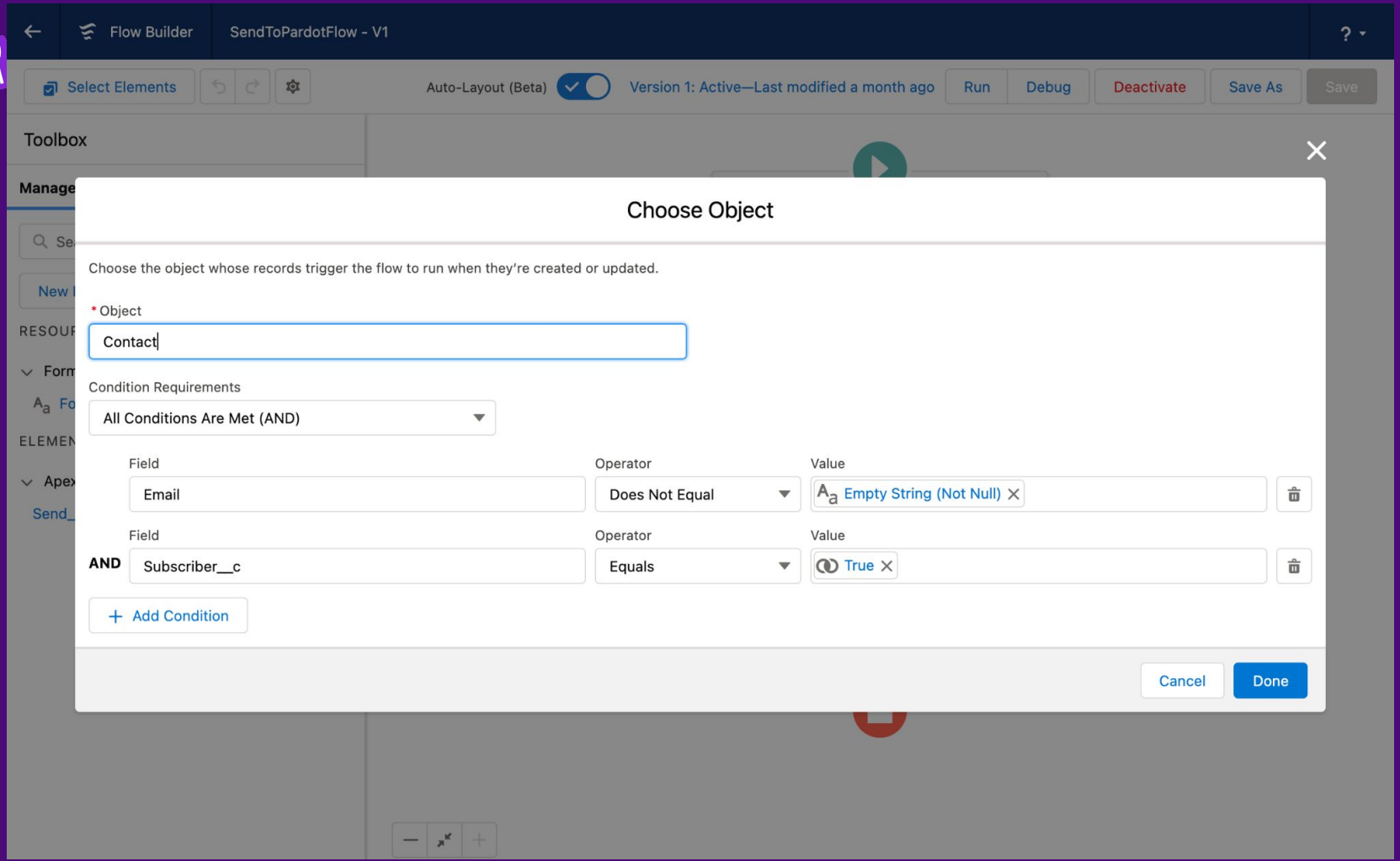


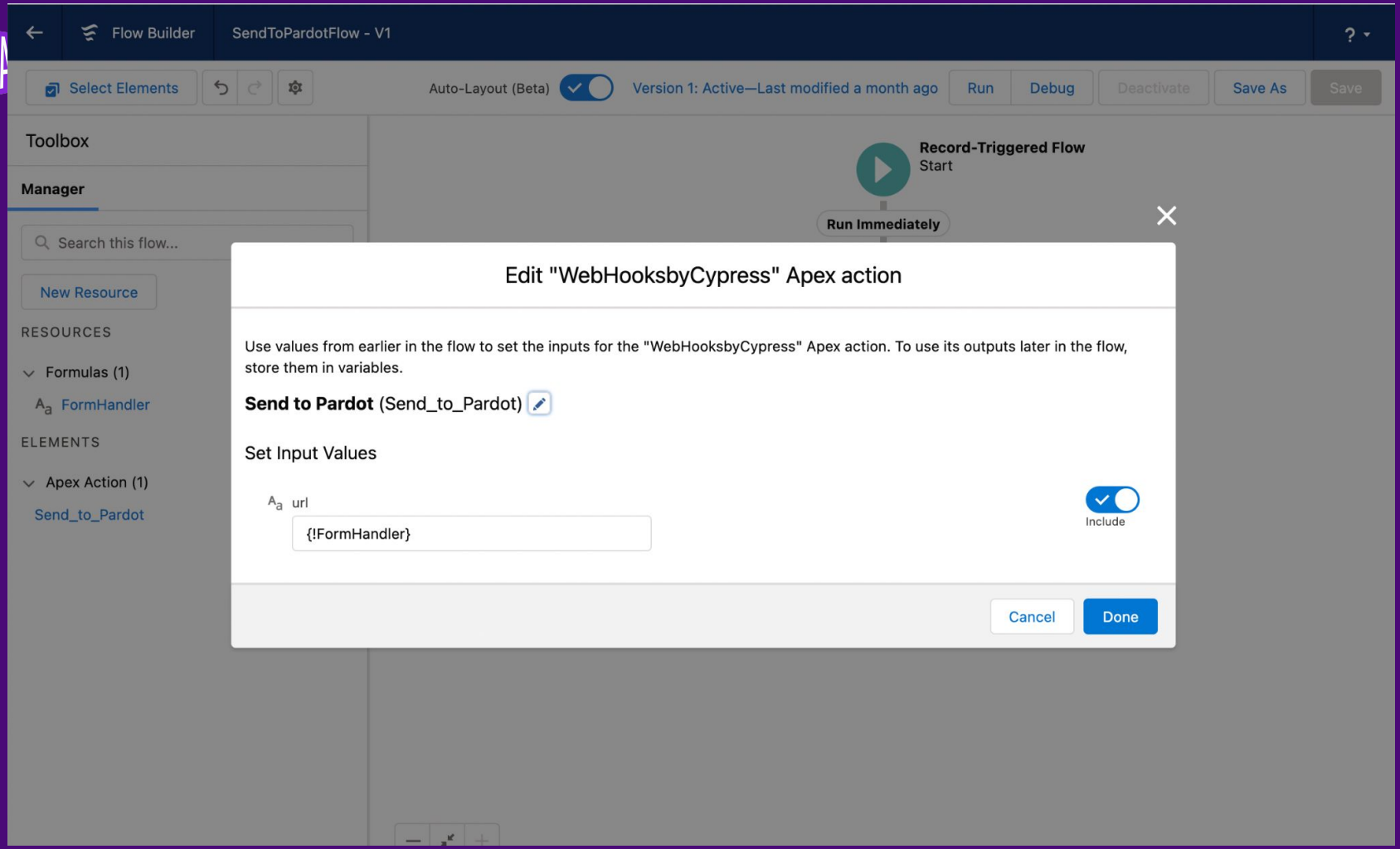
Selective Sync with Salesforce

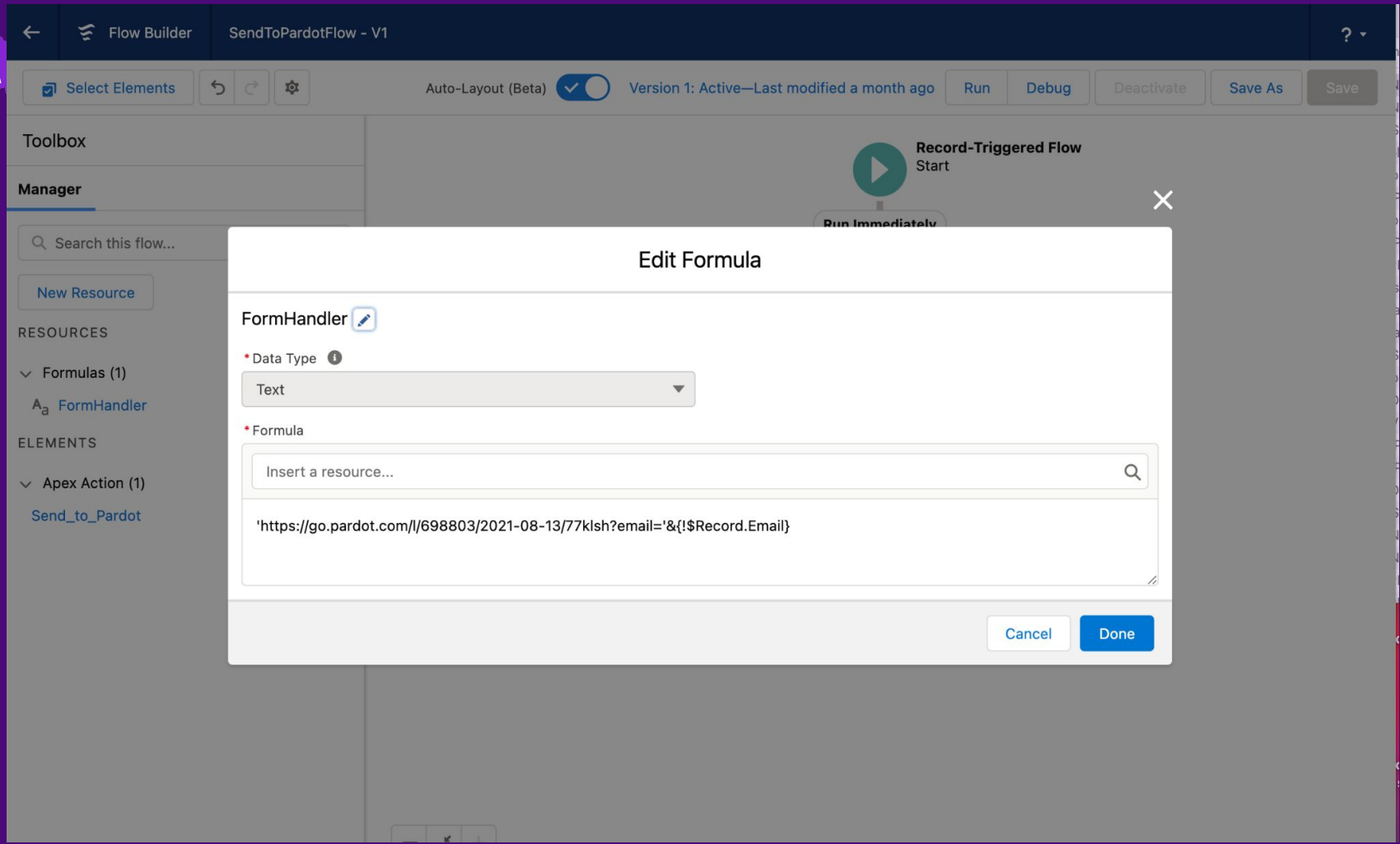

Process Builder - Send to Pardot
Back To Setup
Help
Expand All
Collapse All
View All Processes
Clone
View Properties
Deactivate
Read Only
Email is Updated
TRUE
IMMEDIATE ACTIONS
Send to Pardot
Add Action
FALSE
Add Criteria
TRUE
IMMEDIATE ACTIONS
Add Action
FALSE
STOP
Call Apex
Action Name *
Send to Pardot
Apex Class *
WebHooksbyCypress
Set Apex Variables
'https://go.pardot.com/l/69880
3/77klsh?email='
+ [Lead].Email
Field *
Type *
Value *
var
Formula
'https://go.pardot.com/l/69...
Save
Cancel


Edit Formula
FormHandler
* Data Type
Text
* Formula
Insert a resource...
'https://go.pardot.com/l/698803/[redacted]sh?email='&{!$Record.Email}
Cancel
Done


Flow Builder
SendToPardotFlow - V1
Select Elements
Auto-Layout (Beta)
Version 1: Active—Last modified a month ago
Run
Debug
Deactivate
Save As
Save
Toolbox
Manager
Search this flow...
New Resource
RESOURCES
Formulas (1)
FormHandler
ELEMENTS
Apex Action (1)
Send_to_Pardot
Record-Triggered Flow
Start
Run Immediately
Send to Pardot
Apex Action
End


Flow Builder
SendToPardotFlow - V1
Select Elements
Auto-Layout (Beta)
Version 1: Active—Last modified a month ago
Run
Debug
Deactivate
Save As
Save
Toolbox
Choose Object
Choose the object whose records trigger the flow to run when they're created or updated.
* Object
Contact
Condition Requirements
All Conditions Are Met (AND)
Field
Operator
Value
Email
Does Not Equal
Empty String (Not Null)
AND
Subscriber__c
Equals
True
Add Condition
Cancel
Done


Flow Builder
SendToPardotFlow - V1
Select Elements
Auto-Layout (Beta)
Version 1: Active—Last modified a month ago
Run
Debug
Deactivate
Save As
Save
Toolbox
Manager
Search this flow...
New Resource
RESOURCES
Formulas (1)
FormHandler
ELEMENTS
Apex Action (1)
Send_to_Pardot
Record-Triggered Flow
Start
Run Immediately
Edit "WebHooksbyCypress" Apex action
Use values from earlier in the flow to set the inputs for the "WebHooksbyCypress" Apex action. To use its outputs later in the flow, store them in variables.
Send to Pardot (Send_to_Pardot)
Set Input Values
url
{!FormHandler}
Include
Cancel
Done


Flow Builder
SendToPardotFlow - V1
Select Elements
Auto-Layout (Beta)
Version 1: Active—Last modified a month ago
Run
Debug
Deactivate
Save As
Save
Toolbox
Manager
Search this flow...
New Resource
RESOURCES
Formulas (1)
FormHandler
ELEMENTS
Apex Action (1)
Send_to_Pardot
Record-Triggered Flow
Start
Run Immediately
Edit Formula
FormHandler
* Data Type
Text
* Formula
Insert a resource...
'https://go.pardot.com/l/698803/2021-08-13/77klsh?email='&{!$Record.Email}
Cancel
Done

https://info.cypresslearning.com/selective-sync

PROMO: PARDREAMIN21

Thanks for listening!

@WaltonForce

brandonkwalton

You can find me on the social media links above
or hit me up at brandon@cypresslearning.com

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