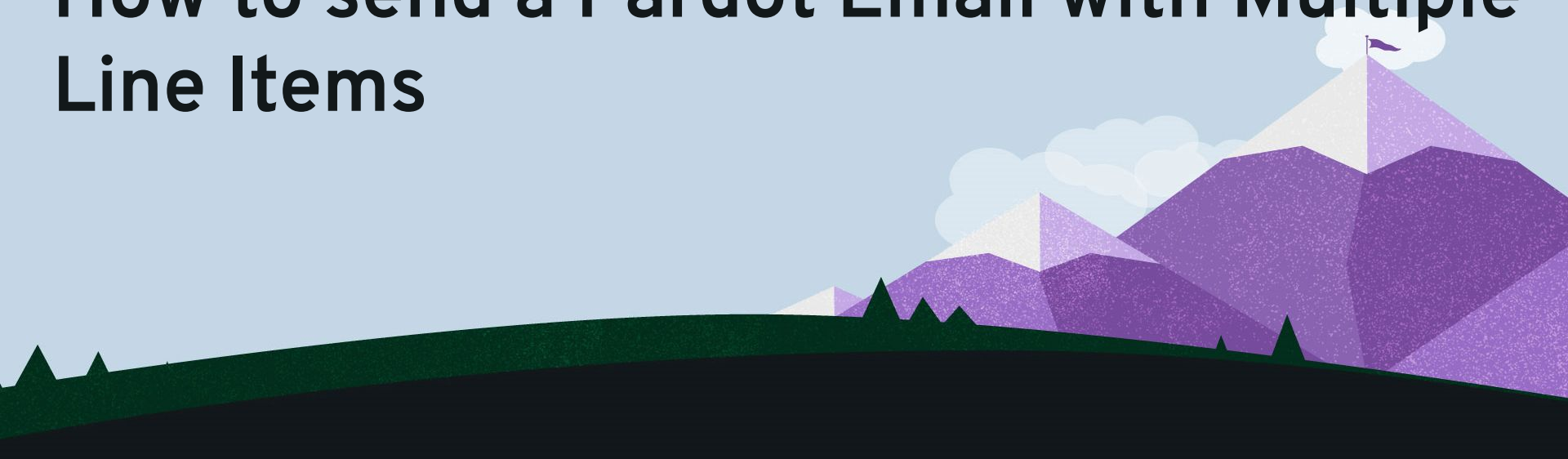


SESSION:

How to send a Pardot Email with Multiple Line Items



How to send a Pardot Email with Multiple Line Items

Advanced | Tech



Adam Erstelle
Sercante

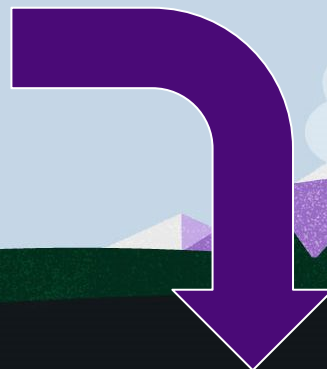


How to send a Pardot Email with Multiple Line Items

Recipes, Pseudocode, APIs, Real Code (python)

Yes, this session is being recorded and will be available afterwards

Yes, the code is available for you to download and play



“

A single email which displays groups of information for more than one “thing”.

”

Multiple Line Items?

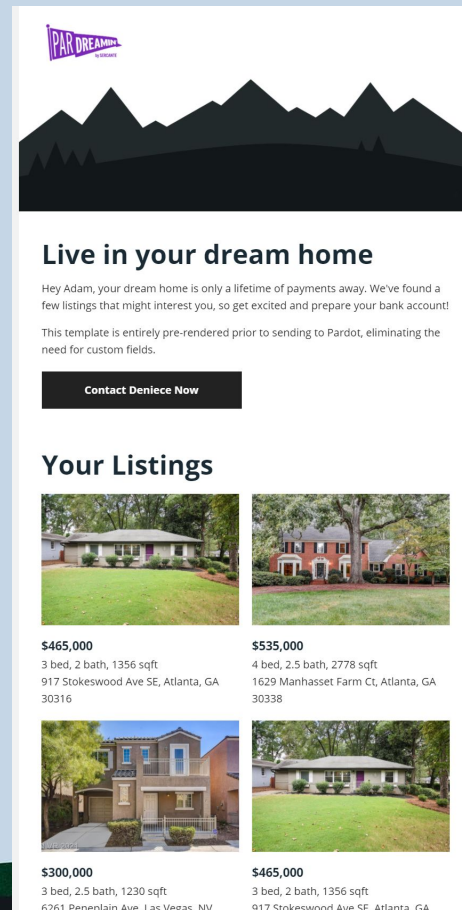
A few examples:

- Including details of multiple Opportunities
- Products
 - Recommendations
 - Renewal information/reminders
 - Abandoned Cart with selection details
- Upcoming webinars not yet attended
- Blog posts that must be read
- Recommended Travel Destinations
- Real Estate Listings of Interest
- Top Deals relevant to you

What we are aiming for

Prospect Email with Real Estate Listings

- Simple Email Template
- # of Listings displayed may not be known in advance
- Each Prospect may get a different set of listings



PAR DREAMIN
by SERCANTE





Live in your dream home

Hey Adam, your dream home is only a lifetime of payments away. We've found a few listings that might interest you, so get excited and prepare your bank account!

This template is entirely pre-rendered prior to sending to Pardot, eliminating the need for custom fields.

[Contact Deniece Now](#)

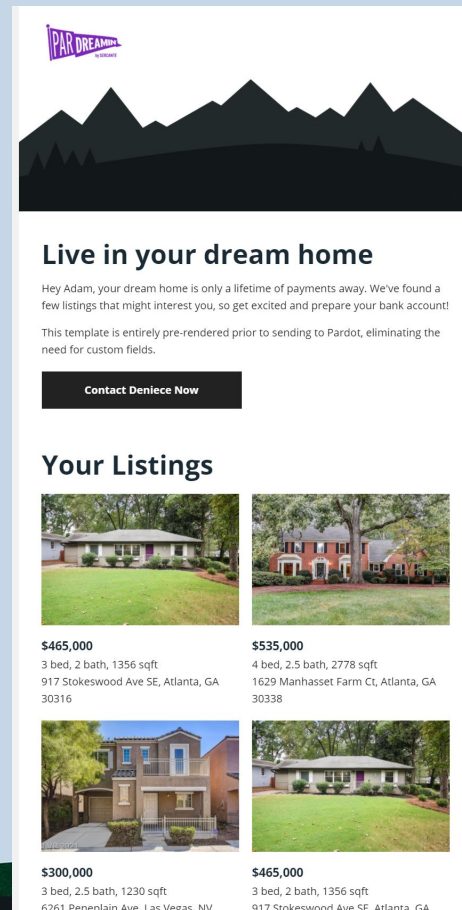
Your Listings

	
\$465,000 3 bed, 2 bath, 1356 sqft 917 Stokeswood Ave SE, Atlanta, GA 30316	\$535,000 4 bed, 2.5 bath, 2778 sqft 1629 Manhasset Farm Ct, Atlanta, GA 30338
	
\$300,000 3 bed, 2.5 bath, 1230 sqft 6261 Peneplain Ave, Las Vegas, NV	\$465,000 3 bed, 2 bath, 1356 sqft 917 Stokeswood Ave SE, Atlanta, GA

How do we get there?

Prospect Email with Real Estate Listings

- Discovery Questions
- Check the Recipe Book
- High Level Build Steps (pseudocode)
- Code & Demo



The image shows a preview of an email template. At the top left is the 'PAR DREAMIN by SERCANTE' logo. Below it is a black silhouette of a mountain range. The main heading is 'Live in your dream home'. The body text reads: 'Hey Adam, your dream home is only a lifetime of payments away. We've found a few listings that might interest you, so get excited and prepare your bank account! This template is entirely pre-rendered prior to sending to Pardot, eliminating the need for custom fields.' Below the text is a black button with white text that says 'Contact Deniece Now'. Underneath is a section titled 'Your Listings' which contains four real estate listings arranged in a 2x2 grid. Each listing includes a photo of a house, a price, and basic details like the number of bedrooms and bathrooms.

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Your Listings

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 <p>\$300,000 3 bed, 2.5 bath, 1230 sqft 6261 Penelapain Ave, Las Vegas, NV</p>	 <p>\$465,000 3 bed, 2 bath, 1356 sqft 917 Stokeswood Ave SE, Atlanta, GA</p>

Key discovery questions

Guiding the build

- Should the template reside in Pardot?
- Will the email differ between Prospects?
- How many Prospects are we sending this to?
- Can a Prospect receive more than 1 email?

Having a greater understanding of what you are trying to accomplish will help you build the right solution.

Where Should the Template Reside?

Key Discovery Questions

Benefits of a Pardot Template

- Marketing can make tweaks to the Template
- Template level Email Reporting

Challenges of a Pardot Template

- Maximum number of line items must be known
- Heavy use of Prospect Custom Fields

Benefits of an External Template

- Powerful Templating Engines can simplify the build
- Can leverage existing Pardot fields & merge

Challenges of an External Template

- Changes to the template must be made outside of Pardot

Will the Email Differ Between Prospects?

Key Discovery Questions

Yes, everyone will see “things” relevant only to them

- Email Content needs to be determined for each Prospect before reaching Pardot
- OR
- Pardot Prospect Custom Fields must contain the right information for a Template to leverage

No, everyone will see the same list of “things”

- Email Content can be fixed, and sent to a List of Prospects
-
- Can be done with Pardot Email Content and Editor
- OR
- Can be sent via Pardot API

How many Prospects are we emailing?

Key Discovery Questions

Less than 5,000:

- API Design can be a little more forgiving

More than 5,000:

- Working with API limits and ensuring performance will become more important. May need to leverage Batch Update (for adding to Static Lists) and using List Email Sends
- For Pardot Templates, may need to use bulk update, import APIs to send field data

Can a Prospect get more than 1 Email?

Key Discovery Questions

No:

- One-to-One Emails ideal for low-volume
- List Sends ideal for high-volume
 - Use an existing list
 - Create a send-specific static list

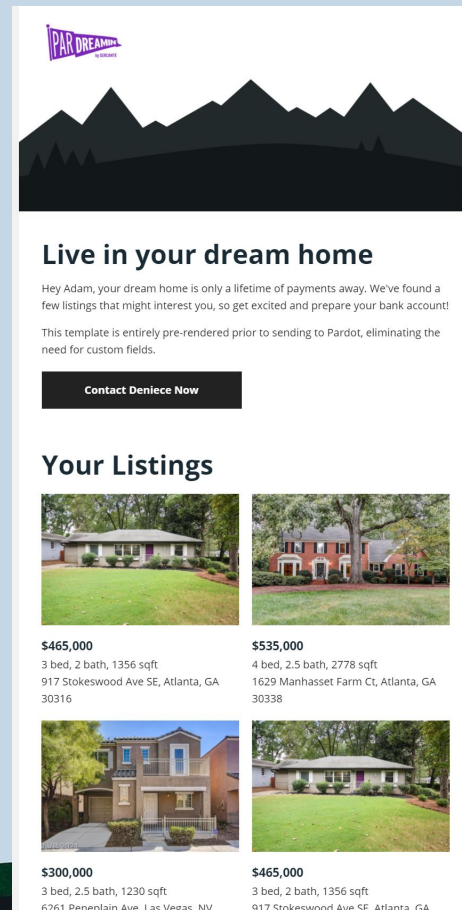
Yes:

- One-to-One Emails ideal for low-volume
- List Sends ideal for high-volume, gets tricky
 - Send everyone 1st email with first list send
 - Additional emails
 - New Static list just for this 2nd send
 - Use one-to-one emails for additional sends

How do we get there?

Prospect Email with Real Estate Listings

- Template in Pardot
- Email is different for each Prospect
- 3 Test Prospects
- A prospect **will not** get more than 1 email in a send



The screenshot shows an email template with a purple mountain range graphic at the top. Below the graphic is the 'PAR DREAMIN by SERCANTE' logo. The main heading is 'Live in your dream home'. The body text reads: 'Hey Adam, your dream home is only a lifetime of payments away. We've found a few listings that might interest you, so get excited and prepare your bank account! This template is entirely pre-rendered prior to sending to Pardot, eliminating the need for custom fields.' Below this is a black button with white text that says 'Contact Deniece Now'. The section 'Your Listings' features four property cards, each with a photo, price, and address.

PAR DREAMIN
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Live in your dream home

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 <p>\$300,000 3 bed, 2.5 bath, 1230 sqft 6261 Penelapin Ave, Las Vegas, NV</p>	 <p>\$465,000 3 bed, 2 bath, 1356 sqft 917 Stokeswood Ave SE, Atlanta, GA</p>

Common Email, External Template

Recipe & Pseudocode

Perfect for emails where the “items” are the same for a known List of Prospects.

Allows one email per Prospect, with simple personalization (using Prospect field data already there)

API Details:

- 1 API request per email

```
Load original email template  
Get Line Items  
Compile / Render HTML & Email Details
```

```
API to Login to Salesforce  
API to send List Email
```

Individual Emails, External Template

Recipe & Pseudocode

Perfect for complicated emails with highly dynamic section rendering depending on Line Item information or Prospect details.

Allows multiple emails per Prospect with varying details in each email.

API Details:

- 1 API request per email, 1-3 emails per second**

```
Get list of people needing email
Load original email template
API to Login to Salesforce
```

For each email:

```
    Get Line Items
    Compile / Render HTML & Email Details
    Pardot API to send One-to-One Email
```

Pardot Email Template, Multiple Items

But how you say? Well, we are going to cheat

Prospect Custom Fields

- We will have to “flatten” the data, into a single record
- Multiply # of items X # of Item Fields
- Best accomplished with a naming convention
PREFIX_ITEM<#>_FIELD
 - Recommendations_Product4_ImageUrl
 - ParDreamin_Listing2_Price
 - Dreamforce_Webinar3_TopicName

Email Template

- HTML will need to be written assuming max # of items is present.
- Surround each “item” block of HTML with an **HML Conditional Statement**
 - `{{#if ParDreamin_Listing5_Name}}`
HTML block containing everything for a Listing
`{{/if}}`
- Allows template to support a max number of items, and gracefully show less for certain Prospects

Pardot Email Template, Multiple Items

Custom Fields Built to support this demo

- PD2021_Listing1_Price
- PD2021_Listing1_Bedrooms
- PD2021_Listing1_Bathrooms
- PD2021_Listing1_Sqft
- PD2021_Listing1_Address
- PD2021_Listing1_ListingUrl
- PD2021_Listing1_ImageUrl
- PD2021_Listing2_Price
- PD2021_Listing2_Bedrooms
- PD2021_Listing2_Bathrooms
- PD2021_Listing2_Sqft
- PD2021_Listing2_Address
- PD2021_Listing2_ListingUrl
- PD2021_Listing2_ImageUrl
- PD2021_Listing_Count
- PD2021_Listing_AgentName
- PD2021_Listing3_Price
- PD2021_Listing3_Bedrooms
- PD2021_Listing3_Bathrooms
- PD2021_Listing3_Sqft
- PD2021_Listing3_Address
- PD2021_Listing3_ListingUrl
- PD2021_Listing3_ImageUrl
- PD2021_Listing4_Price
- PD2021_Listing4_Bedrooms
- PD2021_Listing4_Bathrooms
- PD2021_Listing4_Sqft
- PD2021_Listing4_Address
- PD2021_Listing4_ListingUrl
- PD2021_Listing4_ImageUrl
- PD2021_Listing5_Price
- PD2021_Listing5_Bedrooms
- PD2021_Listing5_Bathrooms
- PD2021_Listing5_Sqft
- PD2021_Listing5_Address
- PD2021_Listing5_ListingUrl
- PD2021_Listing5_ImageUrl
- PD2021_Listing6_Price
- PD2021_Listing6_Bedrooms
- PD2021_Listing6_Bathrooms
- PD2021_Listing6_Sqft
- PD2021_Listing6_Address
- PD2021_Listing6_ListingUrl
- PD2021_Listing6_ImageUrl

Individual Emails, Pardot Template

Recipe & Pseudocode

Perfect for complicated emails with highly dynamic section rendering depending on Line Item information or Prospect details.

Can allow multiple emails per Prospect with varying details in each email (need tweak to logic)

API Details:

- 3 API requests per email, 1-3 emails per second**

```
Get list of people needing email  
API to Login to Salesforce
```

```
For each person:
```

```
  Get Line Items
```

```
  Calculate custom field values
```

```
  API to update prospect, set values
```

```
  API to send One-to-One Email
```

```
  API to update prospect, clear values
```

Individual Emails, Pardot Template (batch)

Recipe & Pseudocode

Perfect for complicated emails with highly dynamic section rendering depending on Line Item information or Prospect details.

Would need to repeat Pseudocode for people receiving a 2nd (or 3rd) email

API Details:

- 30-50 Prospects per API update batch*
- 1 API requests per email, 1-3 emails per second**

```
Get list of people needing email  
API to Login to Salesforce
```

```
For each person:
```

```
    Get Line Items
```

```
    Calculate custom field values
```

```
    Add Prospect to batch
```

```
API to batch update Prospects
```

```
For each person:
```

```
    API to send One-to-One Emails
```

```
    Calculate empty custom field values
```

```
    Add Prospect to batch
```

```
API to batch update Prospects
```

Indiv. Emails, Pardot Template, List Send

Recipe & Pseudocode

Great for complicated emails with highly dynamic section rendering depending on Line Item information or Prospect details.

Best used when Prospects will receive a single email using a Pardot Template.

API Details:

- 30-50 Prospects per API update batch*

```
Get list of people needing email
API to Login to Salesforce

API to create Static List for this send
For each person:
    Get Line Items
    Calculate custom field values
    Add prospect to batch
API to batch update, adding Prospects to List
API to send List Email, wait for it to send

For each person:
    Calculate empty custom field values
    Add Prospect to batch
API to batch update Prospects
```

Indiv. Emails, Pardot Template (import)

Recipe & Pseudocode

Perfect for complicated emails with highly dynamic section rendering depending on Line Item information or Prospect details, at a very high volume of Prospects

Would need to repeat Pseudocode for people receiving a 2nd (or 3rd) email

API Details:

- 50 Prospects per API update batch*
- Import via API can take a while, need to wait & poll

```

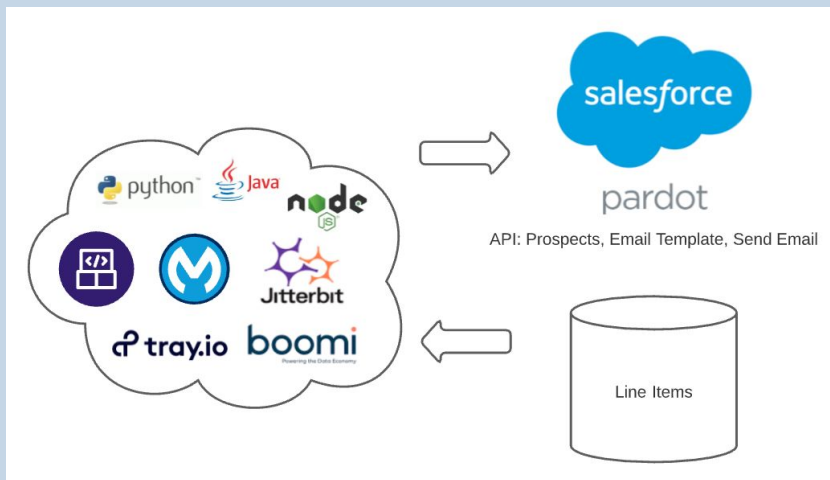
Get list of people needing email
API to Login to Salesforce
API to create Static List
For each person:
    Get Line Items
    Calculate custom field values
    Add Prospect values to CSV
    Add Prospect to batch (add to static list)

API to start import CSV
API to batch update prospects, groups of 50
API to send List Email, wait for it to send

For each person:
    Calculate empty custom field values
    Add Prospect to batch
API to batch update Prospects
  
```

Building the Script / App / Service

Recipe

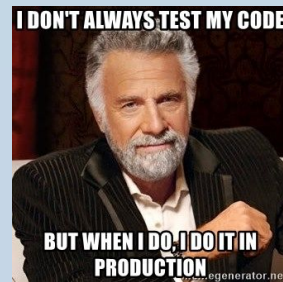


- Doing this needs something custom to be built
- You might be able to leverage iPaaS, though most likely code
- Solution needs to “live” somewhere, whatever you can build and support!
 - Python script on a Laptop
 - APEX code in Salesforce
 - Workflow in tray.io
 - Java code on Heroku
 - .NET code on Azure

Demo Time

Code Demo using Python Scripts

- Code Sample available in github (link at bottom right of slides, and in Chat)
- Create & Delete Custom Fields that support the demo
- Send Pre-Rendered HTML to Prospects
- Update Prospects & Send Using Template -> One-to-One
- Update Prospects & Send Using Template -> List send (using predefined list)
- Because demo sends emails, this only works in Production



Demo Time

Code Demo using Python Scripts

Thanks for listening!



adamerstelle



adamerstelle

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

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