

Meet the New Pardot Developer Experience

Advanced | Tech



Christopher Cornett
Salesforce Pardot - Sr. Product Manager



Speaker Agenda

What will be covered today?

Time	Agenda	Extra Info
10:50-10:55	Pardot Developer Experience Introduction	
10:55-11:00	An Interview with an App King	
11:00-11:10	Developer Experience Walk Through	
11:10 - 11:15	Wrap-Up	





Pardot's Developer Experience Focus Areas



Functionality



**Training &
Documentation**



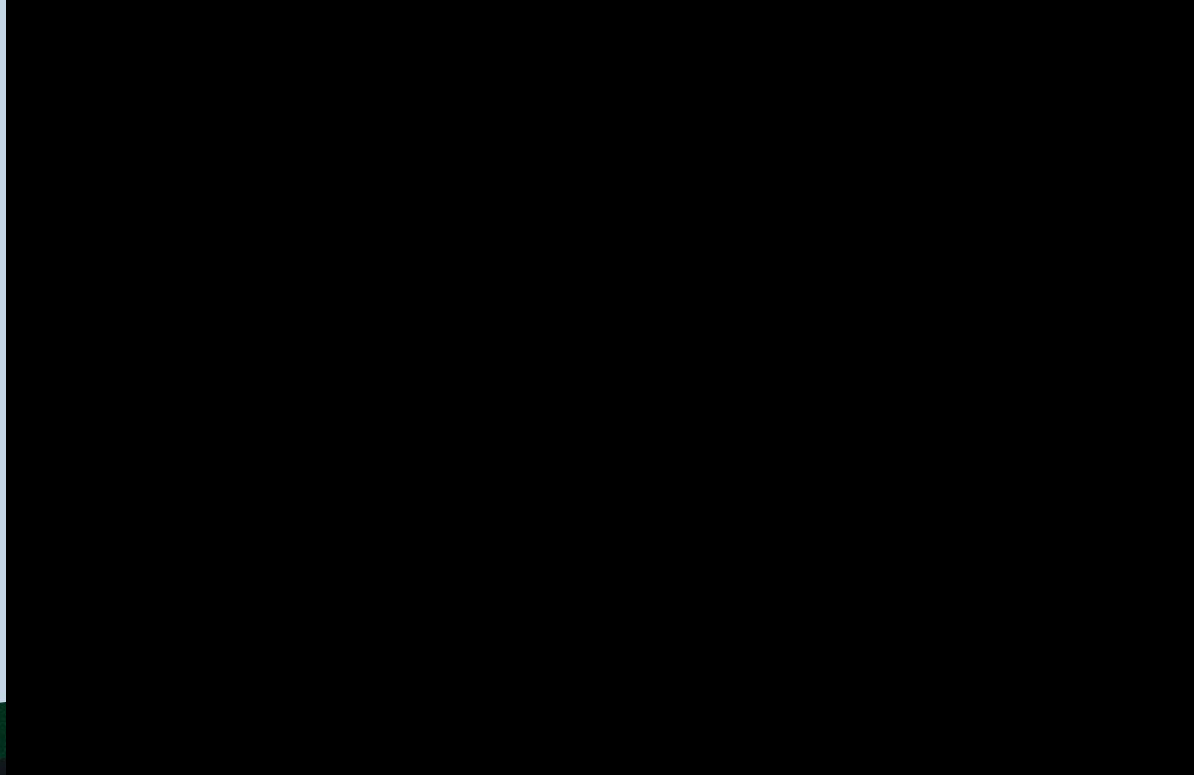
Environments

Matt Fastro - App Kingpin



- Creator of the Preference Reminder App
- 4000 Customers
- Top 5 Pardot Application
- Former Software Engineer

Interview



Ask Jeeves




askjeeves

Pardot Developer Documentation

Search


Ask Jeeves a Question.




Segment CDP

Segment makes customer data work so you can focus on what matters.

[Open](#)

 Segment

October 17, 2021



Pardot APIs | Salesforce Developers

developer.salesforce.com > docs > marketing > pardot > overview

The Import API provides a programmatic way to insert or update large amounts of prospect data in **Pardot**. It uses **Pardot's** existing **API** structures, patterns, ...



Pardot - App Marketplace

App Marketplace > pardot

User **API** Key: To obtain this **API** Key, login to your **Pardot** account and click Settings > My Profile > **API** User Key. 1. Using Salesforce OAuth: On the Salesforce ...



Transitioning to V4 | Pardot APIs | Salesforce Developers

developer.salesforce.com > marketing > pardot > guide > transitioning-v3-v4

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Pardot API V5 - A Quick Introduction | Salesforce Ben

Salesforce Ben > the-drip > pardot-api-v5-a-quick-introduction

Jan 20, 2021 ... Find the full **Pardot v5 API documentation** here. Enough context, let's get down to it. This post will cover what the **Pardot API** is and why v5 ...



Version 5 Docs | Pardot APIs | Salesforce Developers

developer.salesforce.com > docs > marketing > pardot > guide

You can use version 5 of the **Pardot API** to read and update a variety of assets and objects, like File and Layout Template objects. For information abo...



Pardot | Powerful B2B Marketing Automation by Salesforce

Salesforce Pardot

Pardot offers powerful marketing automation to help marketing and sales teams find and nurture the best leads, close more deals, and maximize ROI.



Pardot API V5 Generally Available

help.salesforce.com > apex > HTViewHelpDoc > id=release-notes.rn_pardo...

You are here: Salesforce Help · **Docs** · Salesforce Release Notes. **Pardot API** V5 Generally Available. Now you can use a new, standardized version of the ...

Pardot Implementation Guide - Salesforce Pardot

Salesforce Pardot > training > pardot-implementation-guide

Pardot Implementation Guide · Recommended resources · An overview of setup tasks · Links to all related **documentation** · A printable worksheet to help you stay ...



Get to Know Pardot APIs Unit | Salesforce Trailhead

trailhead.salesforce.com > learn > modules > get-to-know-the-pardot-api

Expand Reporting—Use the Pardot API to automate exporting visitor data to your ... Review **Pardot's developer documentation** to understand currently supported ...



Pardot API Documentation

docs.axway.com > bundle > page > pardot_api_documentation

Pardot APIs

Pardot helps marketers create meaningful connections, generate more pipeline, and empower sales to close more deals. Pardot APIs help you extend Pardot's functionality and automate your workflows.

Get started with the Guides

Key Features

✓ Object APIs

Use the object APIs to work with Pardot objects like Campaigns, Opportunities, Prospects, and more. The actions available vary depending on the object. Some objects, like Visitor Activity, are read-only. Other objects, like Prospects, can be read, assigned, created, updated, or deleted.

✓ Export API

Use the Export API to retrieve large sets of data when you don't need synchronous completion responses or when query limitations are too restrictive.

✓ Import API

The Import API provides a programmatic way to insert or update large amounts of prospect data in Pardot. It uses Pardot's existing API structures, patterns, and terminology. The Import API lets you import a CSV file of prospects.



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- [MuleSoft](#)
- [Tableau](#)
- [Commerce Cloud](#)
- [Lightning Design System](#)

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- [Forums](#)
- [Events and Calendar](#)
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Version 5

Functionality in Version 5

You can use version 5 of the Pardot API to read and update a variety of assets and objects, like File and Layout Template objects. For information about other objects that aren't available in version 5, see the documentation for [versions 3 or 4](#).

Data returned by version 5 endpoints isn't real time, so creates and updates can be delayed when reading and querying data.

Authentication

Developers must authenticate using a Salesforce OAuth endpoint before issuing Pardot API requests. For more information, see [Authentication](#).

Formatting Object API Requests

Use one of the following HTTP verbs for your version 5 API requests:

- **GET** - on collection endpoint to query for objects.
- **GET** - read an object.
- **POST** - create an object.
- **PATCH** - update an object.
- **DELETE** - delete an object.

Query (Using GET)

Query requests are formatted as follows:

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Functionality in Version 5

- Authentication
- Formatting Object API Requests
- Response Format
- Data Types
- Error Responses
- Pagination
- Restrictions and Assumptions

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Getting Started with Pardot APIs

Getting started with Pardot's APIs can be daunting, especially if you're not an experienced developer. This tutorial walks you through a few real-life tasks so you can start automating and extending Pardot.

In this guide:

- We implement authentication using an OAuth2.0 flow.
- Make some example calls and complete a basic task.

Before you begin, make sure you have:

- A Salesforce admin to create a connected app and gather information.
- A Salesforce user with SSO enabled for Pardot.
- A configured Pardot Business Unit.
- Selected which OAuth flow works best for your case. This tutorial uses the Web Server OAuth flow.

This tutorial requires background knowledge of connected apps and authentication. If you're unfamiliar with these topics, we **strongly** recommend that you check out these resources first:

- Salesforce Help: [Connected App and OAuth Terminology](#)
- Trailhead module: [Connected App Basics](#)
- Trailhead module: [Build a Connected App for API Integration](#)

After you familiarize yourself with the basics, come back to this tutorial.

Warning

The calls you make during this tutorial have the potential to impact both your Salesforce and Pardot settings and data. If you're just testing the API, make sure that you're using a sandbox account. If you're using this tutorial to set up your production account, use caution.

Authentication

Contents

Authentication

Working with the API

What's Next



Make a Call with APEX

Learning Objectives

After completing this unit, you'll be able to:

- Describe different ways of accessing the Pardot API.
- Make a call to the Pardot API using the Developer Console and APEX.

Now that you've learned how calling the Pardot API works, you can try it out yourself. In this unit, you use APEX to make a Pardot API call to query the custom redirect object to return a list of custom redirects and their fields.

As we said previously, there are many ways to access the Pardot API. And using APEX code is just one way. You can also build your own apps, or use external apps like Postman. The method we show in this unit can't be used for system-level integrations, but it's great for test-driving the API.

Before you get started, log in as a Pardot admin and have a Pardot Business Unit ID if you have those permissions.

Set Up Authentication

Because you're working in Salesforce, you can use an authentication shortcut for this activity. You create a Visualforce page to create a session, and use the session ID to authenticate to the Pardot API.

- Open the developer console.
- Create a Visualforce page named SessionPage.
- Copy and paste this code:

```
<apex:page contentType="application/json">
{"sessionId": "{!$Api.Session_ID}"}
</apex:page>
```

- Save the file.

The page returns the sessionID in JSON for the APEX class to call to manage authentication.

Create a Class to Store the API Results

Next, create a class to store the results of the custom redirect query. The class also handles converting JSON response

Time Estimate
About 20 mins

Topics

- Learning Objectives**
- Set Up Authentication
- Create a Class to Store the API Results
- Create a Class to Query Custom Redirects
- Execute the Code
- Resources

Challenge +100 points

? Question, feedback or help

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Use Cases for Pardot APIs

The Pardot API lets you extend Pardot to fit your business needs, providing access to your data for use in various ways. The API has so many possibilities that it can feel overwhelming to get started, so we've rounded up a few common use cases here. Start with these examples, then get creative.

Data Augmentation

You can use the Pardot API to clean and enrich prospect data, saving your sales reps hours of time spent on menial tasks. Automate data clean up tasks like normalizing picklist values, capitalizing names, and formatting phone numbers. You can also add data from your vendors by updating prospects via the API.

Example

Your manager asks you to fix all prospect name fields that are in all-caps or lowercase. They also want you to update prospect scores regularly, based on an internal scoring tool. You write some code that checks each prospect name and updates the capitalization. You set it up to run when a new prospect is added, keeping the database neat. You then set up an integration between your internal scoring tool and Pardot that updates the prospect score field every day.

Pardot Objects

- Prospect: get prospect data, update prospect field values

Advanced Reporting

Use the Pardot API to automate exporting visitor data to your own external analytics tools for richer insights.

Example The marketing team wants a detailed analysis of all the web analytics to see how much budget they need to drive clicks and sync web ad targeting. You automate a bulk export of Pardot visitor data, then import it into your company's analytics tool at regular intervals.

Pardot Objects

- Visitor Activity (via the Export API)

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Data Augmentation

Advanced Reporting

Enhanced Segmentation

The screenshot shows a web browser window displaying the Salesforce developer portal. The address bar shows the URL: <https://developer.salesforce.com/docs/marketing/pardot/guide/builder-extensibility-guide.html>. The page header includes the Salesforce logo, navigation links (Home, Documentation, APIs, Discover, Build, Connect, COVID-19), a search bar, and a 'Sign Up' button. Below the header, the page title is 'Pardot APIs' with sub-navigation for 'Overview' and 'Guides'. The 'Guides' section is active, and the 'Builder Extensibility Guide' is selected in the left sidebar. The main content area features the title 'Pardot Email Builder Extensibility Development Guide' and a sub-header 'Documentation / Pardot APIs / Guides'. The text explains that the guide covers ways to extend the email builder experience, including packaged email templates and custom components. A 'Contents' section on the right lists 'Packaged Email Templates for Pardot' and 'Custom Components for Email Content Builder'. The 'Packaged Email Templates for Pardot' section discusses the benefits of using expert-designed templates and the importance of a great email design. The 'Considerations' section lists key points for developers, such as brand awareness goals, 2GP support, and enhanced email template folders.

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Pardot Email Builder Extensibility Development Guide

This guide walks through ways to extend the email builder experience for your Pardot use cases. We cover these use cases:

- **Packaged email templates:** Package your email templates to distribute on AppExchange. This use case is primarily for Independent Software Vendors, known as ISVs.
- **Custom Components for the Email Content Builder:** Custom components extend the building experience by providing a way to implement integrations and new standard building component types.

Contents

- [Packaged Email Templates for Pardot](#)
Custom Components for Email Content Builder

Packaged Email Templates for Pardot

A great email design is an easy way to increase prospect engagement and boost campaign effectiveness. A beautiful email in an easy-to-read format helps to set your marketing apart, and catches your prospects' attention.

However, creating a great email design isn't easy and often requires skills that not all marketers have. Packaged email templates can help fill the gap. Instead of incurring the cost and expending the effort to create their own templates, a marketer can go to AppExchange and purchase ready-to-use templates designed by experts. Now a marketer can get templates in seconds and incorporate them into their next campaign.

Considerations

- Decide whether your primary goal is brand awareness or generating revenue. If the primary goal is brand awareness, then consider listing the templates as a free app.
- Second-generation Packaging (2GP) isn't supported for email template packaging.
- The email template can be in an enhanced email template folder.
 - If a package includes an enhanced email template folder, the target organization must

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Setting Up & Using External Activity via the API

External activity provides marketers with a way to use all their prospect engagement to drive their marketing automations, helping them to send the right message at the right time. Use the Salesforce and Pardot APIs together to submit external activity to Pardot. This guide walks through setting up Extension and Activity types, how to submit activity, and the considerations for using External Activity via API. An extension represents a service that generates activity. Activity types are prospect engagement types that are useful for automation. For example, an extension can be an integration with a webinar service, and the activity types can be registered for call, attended call.

A common use case for this setup is when you want your integration to manage the allowed activity types to ensure that the activities that are submitted are consistent. There are three main components to external activity: an extension, which represents an integration, the activity types, which are the types of engagement types that can be submitted, and the business unit assignment.

To learn more about external activity, see [Salesforce Help](#).

Authentication

The Pardot and Salesforce APIs use Salesforce OAuth to authenticate with a Salesforce SSO User. Learn more in [Authentication](#).

To access the Pardot API and the Tooling API, make sure that the appropriate OAuth Scopes are set up in your [connected app](#):

- Access Pardot services (pardot_API)
- Manage user data via APIs (API)

We also recommend adding the Perform requests on your behalf any time (refresh_token, offline_access) scope. This scope lets you use the [refresh token flow](#) to get a new access token as they expire and minimizes the number of times you must authenticate.

Note

If you're a third-party service and building a generalized integration, consider creating a managed package.

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- Authentication
- Setup
- Submitting Activities

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Pardot ISV Getting Started Guide

Pardot Overview

Pardot, Salesforce's B2B marketing automation tool, is designed to help businesses of every size:

- Find more leads and convert them faster with content that resonates.
- Engage buyers on their terms with tailored, relevant campaigns.
- Deliver connected experiences by aligning marketing, sales, and service teams so that they can win deals and build customer loyalty.
- Act on insights by tracking marketing performance all in one place.

Watch a [demo](#) for more insight into Pardot.

Getting Started

- Trailhead: [Getting Started With Pardot](#)
- Trailhead: [Learn about Pardot APIs](#)
- Sign up for [the Partner Community](#)
- Join the [Partner Community for Pardot B2B Marketing Automation](#) Chatter Group

Pardot Pricing & Licensing

[Pardot Pricing](#)

Becoming a Pardot Partner or Product Development Outsourcer (PDO)

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Other Resources

Use these resources to get the most out of the Pardot API.

Guides

Use these guides to get started fast or learn something new.

- [Getting Started Guide](#): Covers setting up authentication and making your first calls.
- [Use Cases for Pardot APIs](#): Explains a few different ways you can use the Pardot API to meet your business needs.
- [External Activity Guide](#): Covers setting up and submitting external activities via the Pardot API.

Other API Resources

- [Salesforce Endpoints for Pardot Development](#): Use this resource to help find Salesforce endpoints that can help with developing for the Pardot API.

Trailhead

- [Develop Integrations with the Pardot API](#): This Trail focuses on setting up Salesforce OAuth and making your first calls with Pardot.
- [Pardot Trails Trailmix](#): This Trailmix includes all of Pardot's Trails. If you're unfamiliar with Pardot, we suggest starting here to learn more.

Postman

Pardot has a public Postman collection for v5 of the API. Postman simplifies making calls and experimenting with the API. Learn more, and install the collection from [GitHub](#). If you're not familiar with Postman, check out the [Postman API Client](#) module on Trailhead.

Help Content

Use [Salesforce Help](#) to discover more about Pardot features and capabilities.

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- > Salesforce Marketing Cloud A...

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Mock Servers

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Flows

History

Pardot API v5 Watch 12 Fork 10 Run Save Share

Authorization Pre-request Script Tests Variables

This authorization method will be used for every request in this collection. You can override this by specifying one in the request.

Type OAuth 2.0

The authorization data will be automatically generated when you send the request. [Learn more about authorization](#)

Add auth data to Request Headers

Heads up! These parameters hold sensitive data. To keep this data secure while working in a collaborative environment, we recommend using variables. [Learn more about variables](#)

Current Token

Access Token Available Tokens Access Token

Header Prefix Bearer

Configure New Token

Configuration Options Advanced Options

Token Name access_token

Grant Type implicit

Callback URL https://oauth.pstmn.io/v1/browser-call

Auth URL https://{{oauth_domain}}/services/ot...

Client ID {{client_id}}

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Pardot Open-Source Lab Apps

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Pardot Open-Source Lab Apps

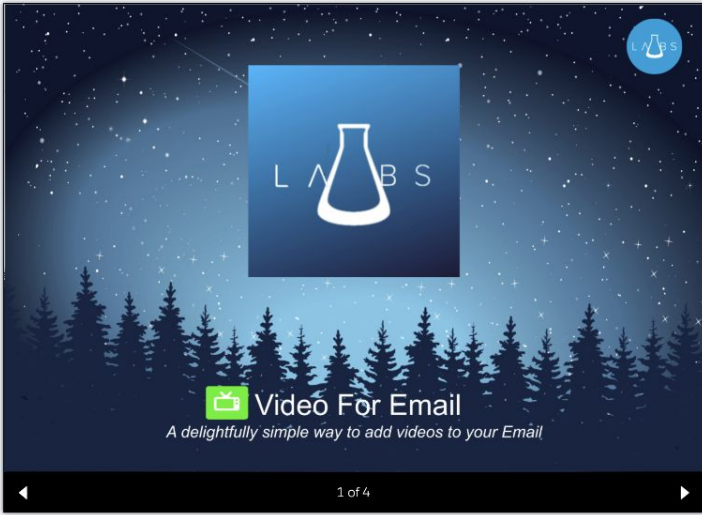
The following apps are provided as-is, and they're managed as open-source projects. These apps provide solutions to various customer pain points for marketers. Even better, the apps provide real-world examples developers can use to get started with their own app.

App Name	Customer Value	Listing	GitHub Location	Example Of
Embedded Feedback within Pardot Emails	Gather instant feedback from prospects within Pardot emails.	Listing	Repo	Email Builder Custom Component
Pardot List Control For Salesforce	Easily manage your prospects without leaving your Salesforce record.	Listing	Repo	Pardot API Integration
Newsletter Lightning Email Template with Google API custom components	Create a newsletter with components for YouTube Webinar and Google Calendar.	Listing	Repo	Packaged Email Template Email Builder Custom Component
Pardot Forms Everywhere!	Use your Pardot forms all over Salesforce.	Listing	Repo	Email Builder Custom Component Pardot API Integration
Getting Started Email Bundle for Pardot	First impressions matter - make it count!	Listing	Repo	Packaged Email Template
Pardot and Digital Engagement SMS Integration	Integrate Digital SMS with Pardot Integrations.	Listing	Repo	Uses Pardot Custom Fields to Trigger an SMS send via Salesforce Sync.

ALL COMPONENTS
Video for Email

By Salesforce Labs

⚠ This listing is private and can't be found by searching or browsing AppExchange.



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★★★★★ (0)

LATEST RELEASE
7/27/2021

A delightfully simple way to add videos to your Email
The Video for Email Lightning Web Component allows you to easily embed video thumbnails in emails.

Overview Reviews

Highlights

- ✓ Easily add video thumbnails with a play button overlay to your email content
- ✓ Track video clicks with Pardot Custom Redirects
- ✓ Generate thumbnails for your videos hosted on youtube/dailymotion automatically

Description

The Video for Email lightning web component lets you embed video thumbnails in your email content. It integrates seamlessly with Pardot Custom Redirects and gives you the ability to not only track video clicks, but also perform automation whenever a prospect opens a video from your email.

If your email is hosted on Youtube or Dailymotion we even pull the thumbnail image directly from the service, saving you time and effort.

Pardot Preference Reminder

Use Case: Remind users why they are receiving an email.

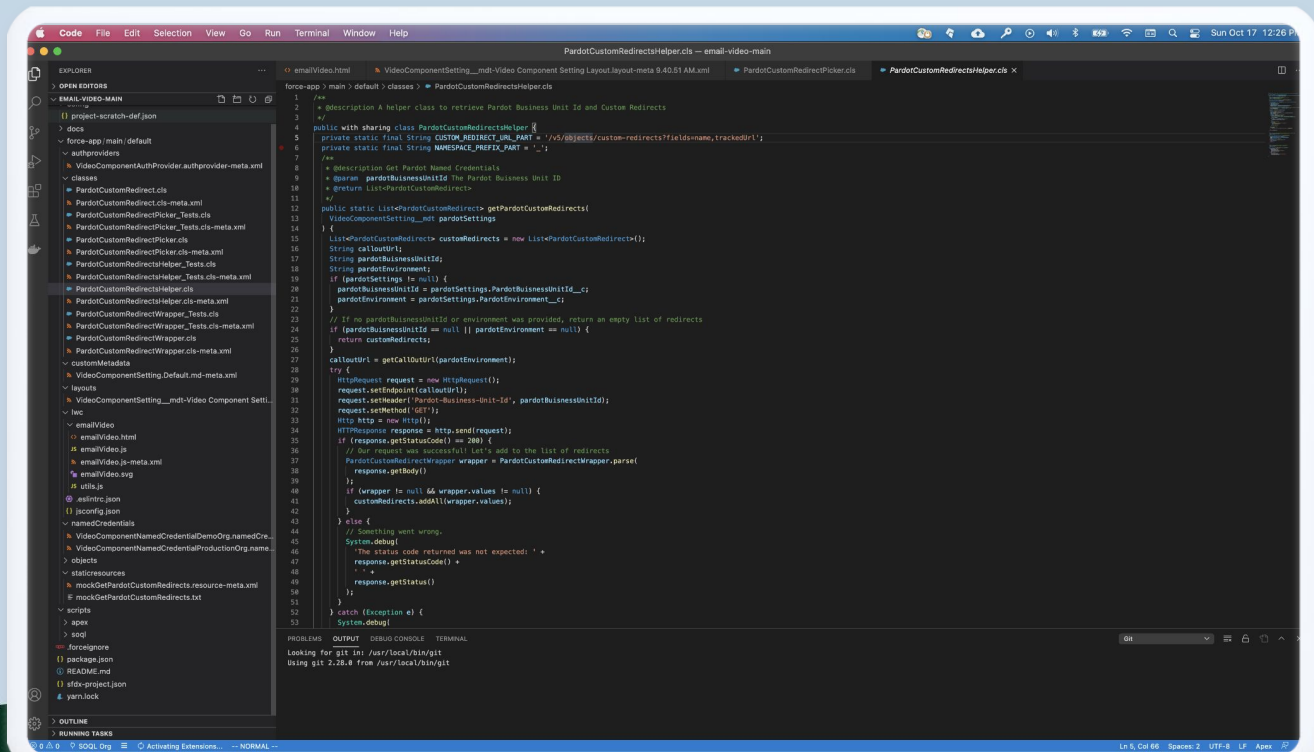
App Function: Email Content Custom Component that allows you to easily select the emails related topic and insert a reminder.

Components Used:

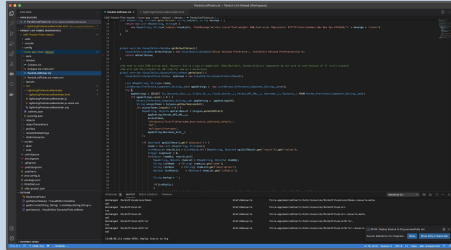
- Pardot API V5
- Connected App
- Named Credentials
- Auth Provider
- Meta-Data Records
- Apex Classes
- LWC



Let's Go Code Mode



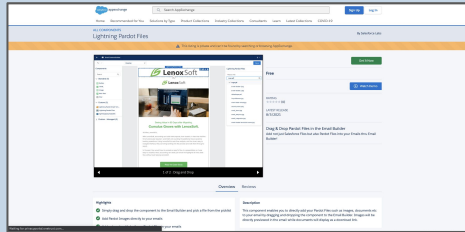
Partnership Benefits



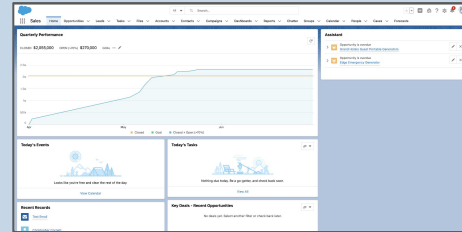
Free Resources to Innovate



World Class Security Reviews



AppExchange Listing



Partner Org

Next Steps

- Take the LWC Getting Started Trail:

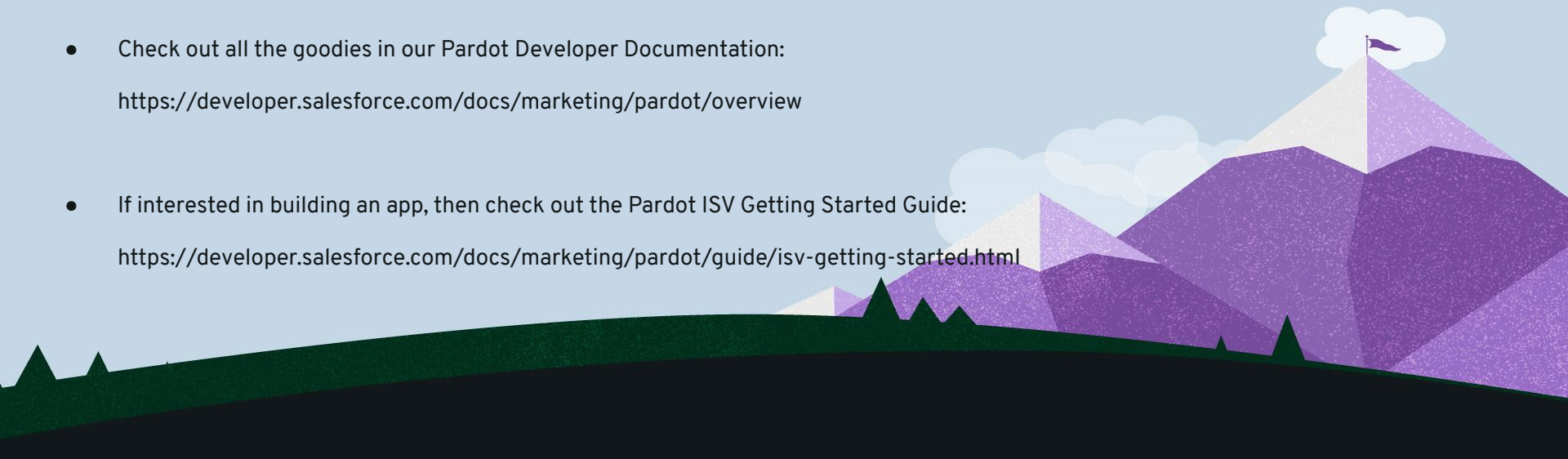
<https://trailhead.salesforce.com/en/content/learn/trails/build-lightning-web-components>

- Check out all the goodies in our Pardot Developer Documentation:

<https://developer.salesforce.com/docs/marketing/pardot/overview>

- If interested in building an app, then check out the Pardot ISV Getting Started Guide:

<https://developer.salesforce.com/docs/marketing/pardot/guide/isv-getting-started.html>



Provide Feedback



<https://sfdc.co/PDXSession>



<https://sfdc.co/PDXFeedback>



<https://sfdc.co/MTNDEQuestions>

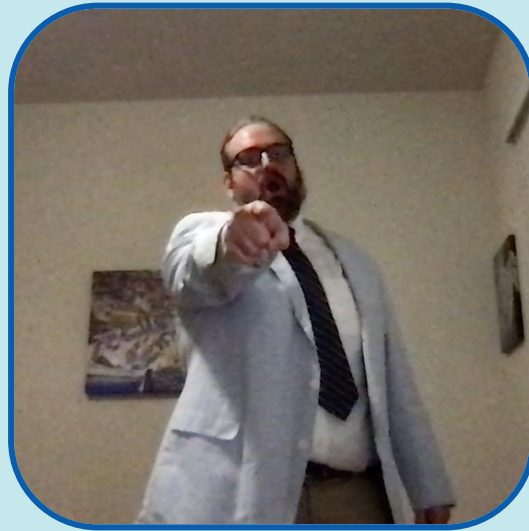
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Helpful Links

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- [Open-Source Pardot API V5 Postman Collection](#)
- [API V5 Endpoint Specifications](#)
- Pardot Labs Reference Apps (Coming Soon)
- Pardot API Trails
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