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**MParDreamin' 2022**

# Pardot Lightning Email And Landing Page Builders: Lessons Learned



**Hannah Horning**

Demand Gen & Marketing Ops Manager,  
ArcherPoint

# Goal of Session

## If you're already a user...

Walk away with tips to ease any frustration and provide tips to resolve limitations you are facing with the lightning builders.

## If you are thinking about switching...

Walk away with a good understanding of the pros/cons of switching to the lightning builders and tips to use when you do switch.

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# Agenda



- My Background
- Pros & Cons
- Live Demo
- Tips & Tricks
- Questions



# My Background

# About Me



- 9 years of experience
- Dabbled in most areas of marketing over the years
- Specializing in Demand Generation & Marketing Operations
- Currently a Pardot & Salesforce Admin for 115+ users
- New to Pardot (not to Salesforce)
- Have experience with many marketing automations & CRMs
- Implemented Pardot for my team in Q1 - Q2





# Pros & Cons



# Email Lightning Builder



## PROS

- Simple, basic email builder
- Drag-and-drop
- No html or CSS experience required
- Easily customize emails on the fly
- Not stuck with rigid templates
- Can be used with multiple domains
- Can be used with multiple preference centers\*
- Salesforce continues to invest

*\*Workaround required*

## CONS

- It's new! Many bugs and issues haven't been reported to Salesforce yet
- Lack of functionality
  - No A/B testing
  - No dynamic content
- Some workarounds may be needed
- Different file location
- Hyperlinks cannot be edited or previewed in builder

# Landing Page Lightning Builder



## PROS

- Simple, basic builder
- Drag-and-drop
- No html or CSS experience required
- Easily customize landing pages
- Can be used with multiple domains\*
- Favicons can be added\*
- Salesforce continues to invest

*\*Workaround required*

## CONS

- Pages are not full-width
- Responsive page options are limited
- No image previews (aka featured images)
- Some customization may still be required to format pages
- Different file location
- No landing page templates
- No branding options
- Challenges deploying reCAPTCHA



# Live Demo



# Tips & Tricks

# Email Tips & Tricks

1. Locking Template Sections
2. Adding Custom Components
3. Using Custom Preference Centers
4. Fixing Hyperlink Spacing Issues
5. Using Templates in Outlook

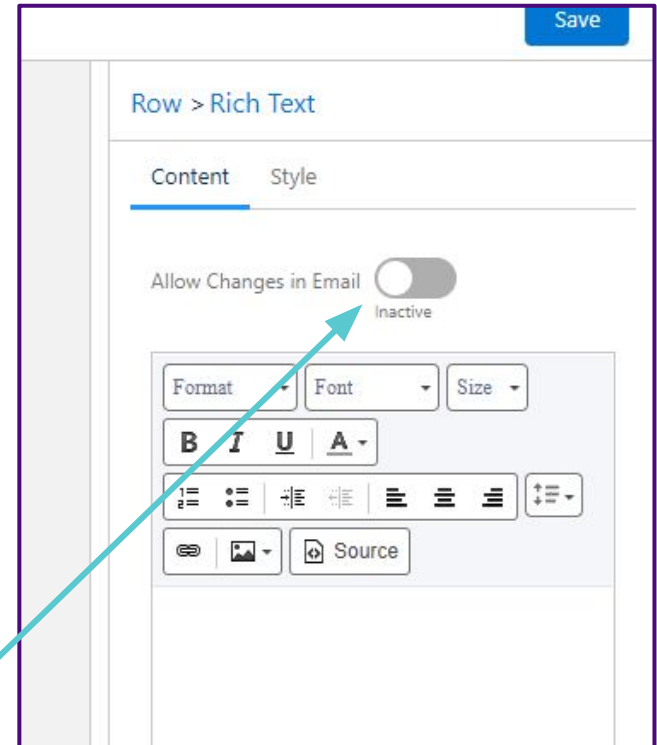


# Tip #1 - Locking Template Sections



- Build out email templates for brand compliance and ease of use
- Email template sections can be locked
- Lock important sections that users should not modify, such as:
  - Header/logo
  - Footer
  - Special content
- Lock email content for other departments (i.e., sales & customer service)
- Each section must be locked/unlocked individually

Toggle this on/off to lock/unlock content sections in templates



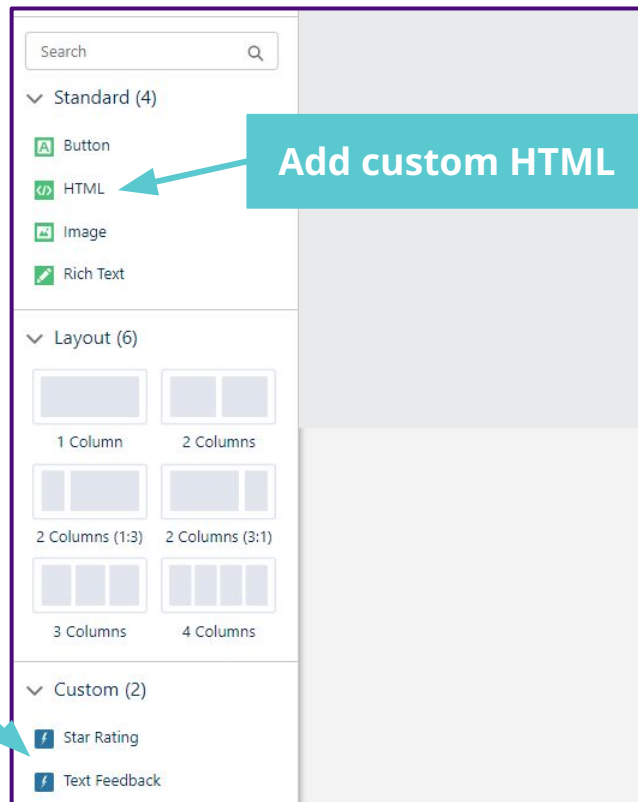
# Tip #2 - Adding Custom Components



Email builder drag-and-drop components are limited, here are ways to extend the functionality:

- Add custom components to builders
  - Create custom components
  - Get pre-built components from AppExchange
- Add HTML sections to your emails
  - Warning: Some HTML code may not be supported

**Example of custom components added to builder**



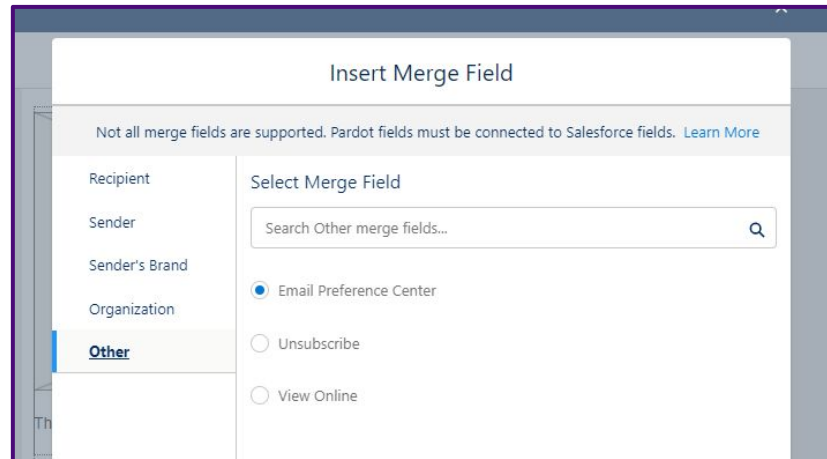
# Tip #3 - Using Custom Preference Centers



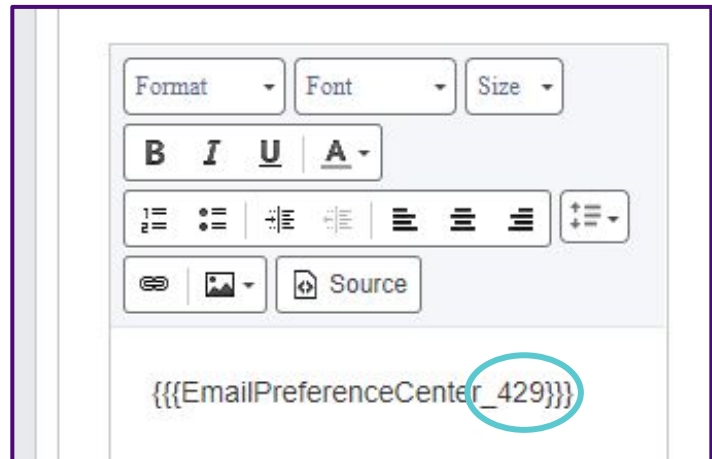
**The Challenge:** Email builder appears to only allow the default preference center to be added.

**The Solution:** Customize the merge tag in emails to use custom preference centers.

**Step 1:**  
Add merge tag to email



**Step 2:** Modify merge tag by adding unique identifier



# How to Find Preference Center Unique Identifier



1. Navigate to legacy email builder
2. Create a new email
3. Create a hyperlink:
  - a. Link Type: "Email Preference Center"
  - b. Select correct preference center
4. Open email HTML
5. Find hyperlinked Merge Tag (see blue circle)

A screenshot of an email editor interface. At the top, there are four tabs: 'EDITOR' (selected), '</> HTML', 'PREVIEW', and 'TEXT'. Below the tabs, there is a text instruction: 'Ensure that if your URLs have spaces or special characters in them they are properly encoded'. The main area shows HTML code with line numbers 1 through 7. Line 2 contains the code: `<p><a href="{{EmailPreferenceCenter_429}}" rel="nofollow,noreferrer">Create a hyper`. A blue circle highlights the merge tag `{{EmailPreferenceCenter_429}}`.

```
1 <!DOCTYPE html PUBLIC "-//W3C//DTD XHTML 1.0 Transitional//EN" "http://www.w3.org/TR/
2 = "text/html," /><title>Email Newsletter</title></head><body style="font-family: Helvet
3 <p><a href="{{EmailPreferenceCenter_429}}" rel="nofollow,noreferrer">Create a hyper
4 <br>
5 {{Recipient.FirstName}},<br>
6 <br>
7 This is some default email content that you can change or delete as you see fit. It's
8 <br>
```

# Tip #4 - Fixing Hyperlink Spacing



**The Challenge:** In builder, spacing around hyperlinks appears normal. When previewed or delivered, spaces around hyperlinks disappear.

## The Solution:

- **Option 1:**

Enter a double space around hyperlinked text

connect. [Let us know you'll be there](#) so we can  
as we're leading, and of course provide you  
Don't forget to RSVP!

A screenshot of a webpage with a teal hyperlink. The text 'Let us know you'll be there' is underlined. A teal arrow points from the 'Option 1' text to the space between the hyperlink and the following text 'so we can'.

- **Option 2:**

Fix spacing in HTML

```
2022"><span style="color:#2fbbed;"><span  
style="font-size:14px;">Let us know |  
you&#39;ll be there</span></span></a> <span
```

A screenshot of HTML code. A teal circle highlights a space character between the closing tag of the first span and the opening tag of the second span: `</span> <span`. A teal arrow points from the 'Option 2' text to this circled space.

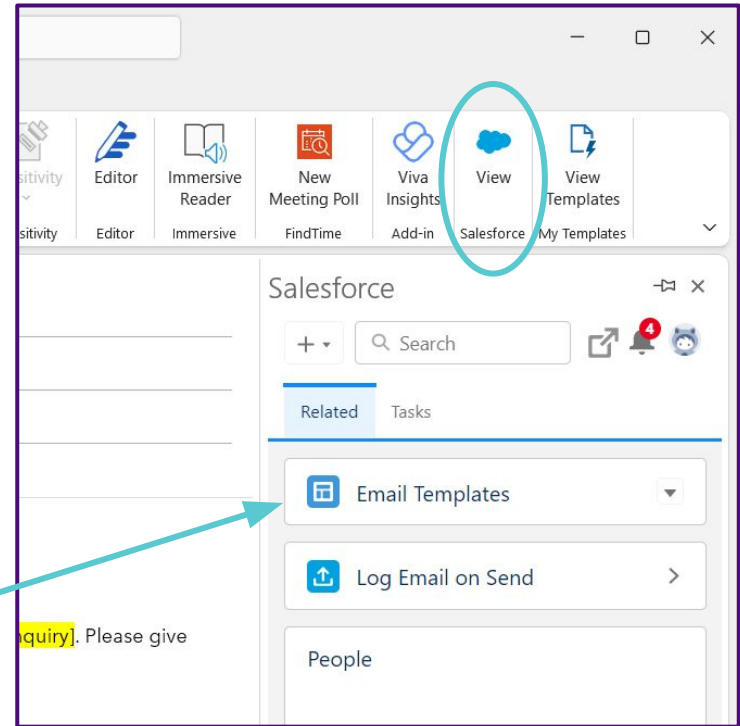


# Tip #5 - Using Templates in Outlook



- Share marketing created templates with other departments (i.e., Business Development, Sales, Customer Service, etc.)
- Users never need to leave Outlook
- Great to standardize lead follow-up, promoting campaigns & events, improve messaging, and more.

**Access email templates saved in Salesforce inside Outlook**



# Landing Page Tips & Tricks

1. Adding Favicons
2. Using Multiple Domains

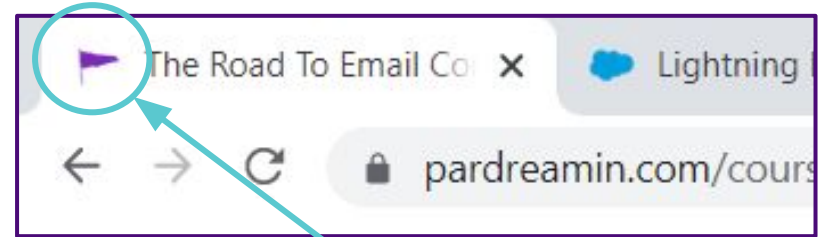
# Tip #1 - Adding Favicons



**The Challenge:** There doesn't seem to be a place to add a favicon to landing pages.

## The Solution:

- Manually add your favicon to landing pages using Header Code.
- Follow the step-by-step instructions on the next slide.



A favicon is a branded icon on a website page or tab.

# How to Add a Favicon



1. Save your favicon to the Pardot file repository
  - a. Generate a short URL and copy to clipboard
2. Create a new image in your Salesforce CMS
  - a. Source Type: "Link to URL"
  - b. Paste the short URL into the URL field
  - c. Fill out the remaining fields and publish
3. Once published, click back on the image from the main screen
4. Grab the URL and paste it into the blue highlighted code below:
  - a. `<link rel="shortcut icon" type="image/png" href="Salesforce CMS URL">`
5. Add the above code to the Header settings on your landing pages

# Tip #2 - Using Multiple Domains



**The Challenge:** Cannot select a specific domain for landing pages. Landing pages always default to the primary tracker domain in Domain Management.

**The Solution:** Any tracker domains set up in your instance are automatically applied to ALL landing pages.



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# Final Thoughts



- Lightning builders are a viable option but may not work for all users
- Functionality is limited but Salesforce continues to invest
- Make an informed decision as a team about switching from the legacy builders
- Work with your partner to deal with complicated issues that arise
- Report problems to Salesforce as you see them
- Upvote enhancement ideas on IdeaExchange
- Share your workarounds with the community



# Questions?



# Thank you!

We appreciate your attendance at this session. If you have any questions please reach out to us via Goldcast or use the information below. We hope you enjoy the rest of the conference!

**Hannah Horning**  
[hhorning@archerpoint.com](mailto:hhorning@archerpoint.com)