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Demystifying The Salesforce And Account Engagement Connector

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Goal

In this session, we will cover the basics of the Salesforce connector in a friendly and easy-to-understand way.

Topics we will touch include:

- Account Engagement V1/V2 connector
- Marketing Data Sharing Rules
- User Sync
- The multiple checkboxes found in the settings panel and field management

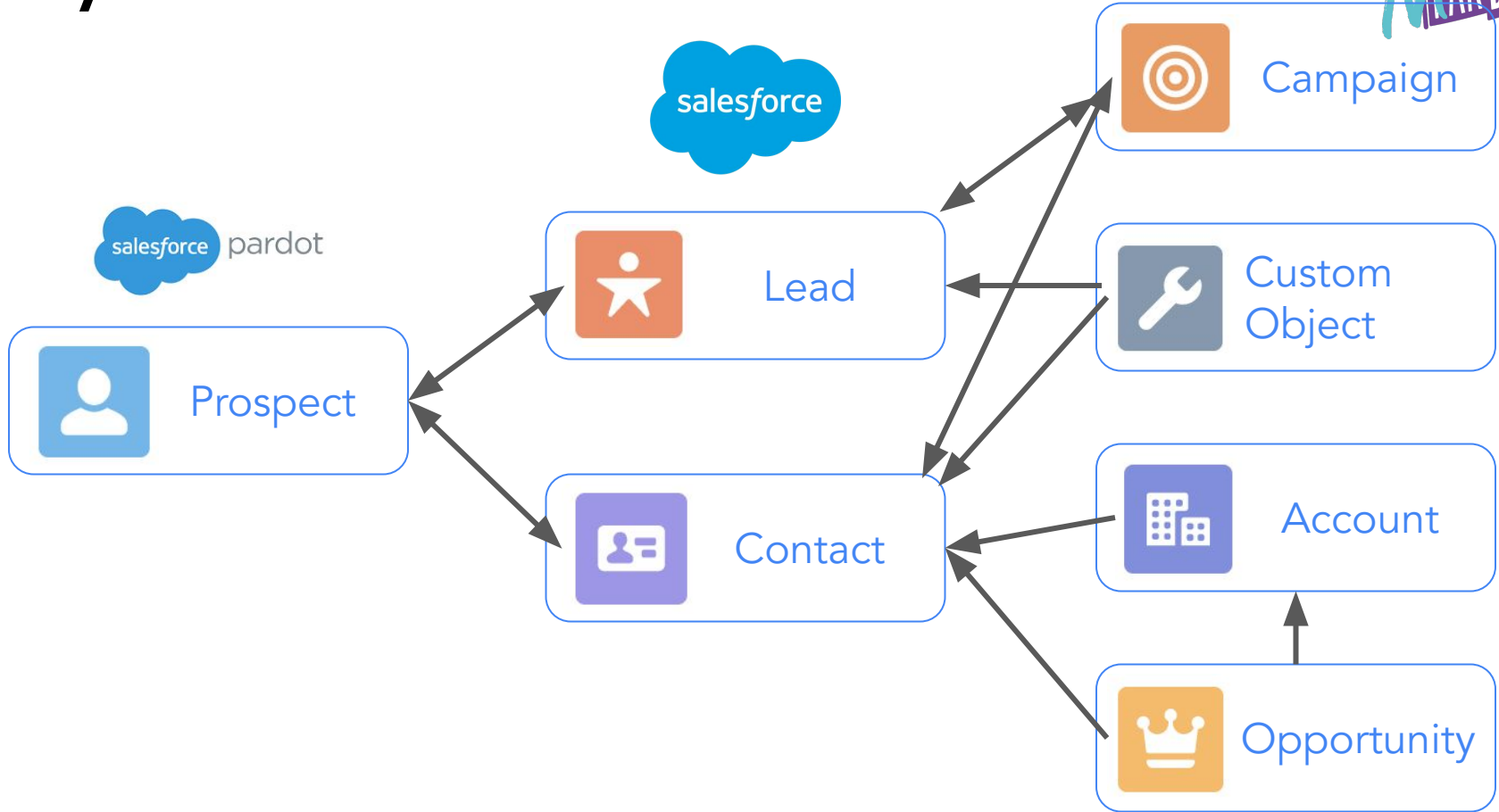


Pardot

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**Marketing Cloud Account
Engagement**

Sync Behavior



Syncing: Account Engagement to Salesforce



Prospects
completes a
form
form handler or
landing page

Prospect is
assigned to a
User*

Salesforce looks for
a matching Contact,
then a Lead,
if neither, a new
Lead is created

* Users must be mapped between the two platforms

PARDOT PEAK 7.1

CONVERSION CANYON 2.6

REVENUE RIVER 3.9

Syncing: Salesforce to Account Engagement



User creates* or edits a record

Account Engagement checks if those field changes exist in that system

Account Engagement updates or creates* linked (by ID) records with data from Salesforce

*Depends on connector settings, connected fields and field sync behavior

PARDOT PEAK 7.1

CONVERSION CANYON 2.6

REVENUE RIVER 3.9

Sync Behavior



- Account data will sync down into Account Engagement automatically when Account Engagement detects a Contact with a valid Account reference in Salesforce.
 - This sync is one-way and treats Salesforce as the master.
- Opportunities must be tied to a syncing contact in order for it to be created in Account Engagement.
 - i.e. No contact, no opportunity

Account Engagement Connector Version



V1 Connector

- Purchased/Installed before Feb 2019
- It relies on a Connect User who must have a Salesforce license and the proper permissions
- Account Engagement sees what the Connector User sees

V2 Connector

- Purchased/Installed after Feb 2019 or upgraded
- Can rely on an integration user OR a connector user
 - The integration user can utilize Marketing Data Sharing (Advanced & Premium editions)
- More secure
- Allows you to pause the connector
- Access to the Business Unit Switcher

V2 Connector Benefits



Using a Connector User

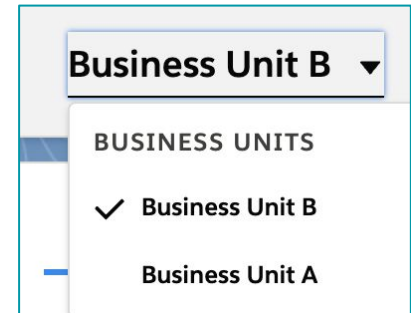
- Custom permissions that won't affect users
- Won't have to change connector user when someone leaves the company

Allows you to pause the connector

- Beneficial when mass updates are happening in one or both systems

Access to the Business Unit Switcher

- Single user can have access to multiple business units
- Easily switch between business units within PLA



Connector Settings



The screenshot shows the Pardot interface with the 'Connector Settings' page open. The left sidebar contains navigation options like 'Account Settings', 'Automation Settings', 'Object and Field Configuration', 'Connectors', 'Domain Management', 'Exports', 'Imports', 'Recycle Bin', 'Security', 'System Emails', 'User Management', 'Users', 'Groups', 'Roles', and 'Editing Sessions'. The main content area is titled 'CONNECTOR SETTINGS' and includes sections for 'Change Trusted Connection User', 'Customize Connector Preferences', 'Email Logging', and 'Email Notifications'. The 'Change Trusted Connection User' section shows the current user as 'b2bmaintenance@00d5f0' with a 'Change Trusted Connection User' button. The 'Customize Connector Preferences' section has several checkboxes: 'Automatically create prospects in Pardot if they are created as a Lead or Contact in Salesforce' (checked), 'If records do not have a CRM ID to match when syncing, use email address to match.' (checked), 'Exclude Salesforce "Partner" and "Customer Portal" users from Prospect assignment' (checked), and 'Stop syncing Pardot package fields' (unchecked). A dropdown menu for 'Choose Campaign' is set to 'Example Marketing Campaign A'. At the bottom, there are 'Save Connector' and 'Cancel' buttons.

Using the B2BMA Integration user helps you identify Prospects created or edited by Pardot

Sync all eligible Leads/Contacts to Pardot

This will be your Source campaign for any Prospects who originated from Salesforce

Keep this setting on to help prevent dupes

Keeps your list of users tidy when assigning Prospects

Typically only used for Cross-PBU Implementations

Connector Settings



The screenshot shows the Pardot Connector Settings interface. The left sidebar contains navigation options: Security, System Emails, User Management (expanded), Users, Groups, Roles, and Editing Sessions. The main content area is titled 'Pardot Settings' and includes a search bar, a 'Choose Campaign' dropdown menu (set to 'Example Marketing Campaign A'), and several configuration options:

- If records do not have a CRM ID to match when syncing, use email address to match.
- Exclude Salesforce "Partner" and "Customer Portal" users from Prospect assignment
- Stop syncing Pardot package fields [Learn More](#)
- Email Logging**
 - Sync emails with the CRM
 - Sync Engage emails with the CRM
 - Sync plugin emails with the CRM
- Email Notifications**
 - Enable Salesforce emails for task creation
 - Enable Salesforce emails for assignment rules
 - Send Pardot notification emails when a merge is synced down from Salesforce

At the bottom of the settings area are two buttons: 'Save Connector' and 'Cancel'.

Has Storage implications for Salesforce

If Salesforce is already set to send notifications, don't double notify your sales team!

Marketing Data Sharing



- Requires **Advanced or Premium Pardot** + the V2 Connector
- Restrict which records are eligible to sync from Salesforce to Account Engagement
 - Controls which Business Unit records sync to (if multiple)
 - Replaces “Selective Syncing”
- Relies on one rule per object
- Field controlling MDS needs to have pre-determined values (checkbox, picklist)
 - Do not sync this field to Pardot!

The screenshot shows the Pardot user interface for configuring Marketing Data Sharing. The top navigation bar includes 'Pardot', 'Pardot Dashboard', 'Prospects', 'Campaigns', 'Automations', 'Content', 'Email Templates', 'Pardot Email', 'Email Content', 'Pardot Reports', and 'Reports'. The left sidebar contains navigation options: 'Account Settings', 'Automation Settings', 'Object and Field Configuration', 'Connectors', 'Domain Management', 'Exports', 'Imports', and 'Recycle Bin'. The main content area is titled 'MARKETING DATA SHARING' and contains a table of 'Marketing Data Sharing Criteria'.

OBJECT	CRITERIA
Lead	Marketable__c = Yes
Contact	Marketable__c = Yes
Opportunity	Default
Tech Stack	Default

User Sync



Salesforce Profiles map to Account Engagement roles, and **users are managed from Salesforce**

- Better alignment and management of users
- Users only have one set of credentials

Pardot Only users can be given “Identity” Licenses to access PLA

- New Account Engagement Permission set grants them access to
 - PLA
 - Lightning Builders
 - Snippets
 - View Campaigns

User Sync - In Account Engagement



Manage Users in Salesforce

Opt in to Salesforce-side user management to simplify how you create and manage Pardot users. Opting in lets your Salesforce admin assign users to Pardot from Salesforce Setup.

Salesforce Profile	Pardot Role
<input type="checkbox"/> Contract Manager	Marketing
<input type="checkbox"/> Custom Marketing User	Marketing
<input type="checkbox"/> Identity User	Marketing
<input checked="" type="checkbox"/> Marketing User	Administrator
<input type="checkbox"/> Minimum Access - Salesforce	Marketing
<input type="checkbox"/> Read Only	Marketing
<input type="checkbox"/> Sercante Identity User	Marketing
<input type="checkbox"/> Sercante Standard User	Marketing
<input type="checkbox"/> Sercante System Administrator	Marketing
<input type="checkbox"/> Solution Manager	Marketing
<input checked="" type="checkbox"/> Standard User	Administrator
<input checked="" type="checkbox"/> System Administrator	Administrator

Update Pardot user role when a user's Salesforce profile changes

Move Pardot user to the recycle bin when they no longer have an assigned profile

Skip Salesforce users whose email address matches an existing Pardot-only user (recommended).

User Sync



To start, map out how your Salesforce Profiles and Account Engagement roles will connect

Salesforce Profile	Account Engagement Role	Account Engagement Business Unit	Account Engagement Group
System Admin	Admin	All	Admins
Marketing Manager - US	Marketing	US	Marketing
Marketing Manager - Global	Marketing	All	Marketing
Sales - North Amer	Sales	US, CA	Sales

Health Check



- ❑ **Which Connector are you on?**
Helps Identify which capabilities you have access to
- ❑ **Who is your Connector User?**
B2B Integration User or someone else, this helps you identify what Account Engagement can see/do
- ❑ **Are all your Users mapped from Sales Cloud to Account Engagement?**
Make sure that leads/contacts/accounts owned by Users that have left your organization are re-assigned reporting and personalization purposes
- ❑ **How many Prospects in Account Engagement are not in Salesforce?**
Ensure all the Prospects you want in Salesforce are making it into the platform
- ❑ **How many Prospects in Account Engagement are not assigned?**
Identify Users not in Account Engagement or remove those who have left the Salesforce org
- ❑ **How many sync errors do you have?**
Review field values do not line up with Salesforce, review access restrictions that could be affecting automations



Q&A

Additional Resources



- [Connector Installation Guide](#)
- [Upgrade to the V2 Connector](#)
- [Pardot Marketing Data Sharing](#)
- [User Sync Implementation Guide](#)

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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!

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User Sync - In Salesforce



Marketing Users

Users in this group inherit the Pardot role mapped to their profile in User Sync settings. [i](#)

Search: for:

Available Members **Selected Members**

--None-- Group: All Marketing Users

Add
▶
Remove
◀

A screenshot of the Salesforce 'Marketing Users' configuration page. The page has a light gray header with the title 'Marketing Users'. Below the header, there is a line of text: 'Users in this group inherit the Pardot role mapped to their profile in User Sync settings.' followed by an information icon. Below this is a search section with a dropdown menu set to 'Public Groups' and a 'for:' label followed by an empty text input field. The main area is split into two columns: 'Available Members' on the left and 'Selected Members' on the right. The 'Available Members' column contains a scrollable list with '--None--' at the top. The 'Selected Members' column contains a scrollable list with 'Group: All Marketing Users' at the top. Between the two columns are two buttons: 'Add' with a right-pointing arrow and 'Remove' with a left-pointing arrow. Two purple callout boxes are overlaid on the right side of the screenshot. The first callout points to the search dropdown and text input, containing the text: 'You can search by Public Groups or Individual Users but not Profiles'. The second callout points to the 'Group: All Marketing Users' entry in the 'Selected Members' list, containing the text: 'If you use Groups, all Users in the Group are eligible to sync to Account Engagement'.

You can search by Public Groups or Individual Users but not Profiles

If you use Groups, all Users in the Group are eligible to sync to Account Engagement

Campaigns



— Connect Campaigns

Requirements Enable Connected Campaigns and Engagement History

Before you enable Connected Campaigns, select one or more record types. The Master record type syncs all of your Pardot campaigns.

Enable Campaign Member Sync

Sync prospects to Salesforce when they're associated with connected campaigns.

Use Salesforce to manage all campaigns

(Enable this when you are finished connecting Pardot campaigns to Salesforce campaigns.)

Limit Campaign Creation by Date

Each time you edit a campaign in Salesforce, its replicated Pardot campaign is created or updated to reflect the change. To reduce the number of Pardot campaigns, you can limit the number of campaigns created or updated in Pardot.

Show unconnected campaigns in Pardot Campaigns tab

(Unconnected campaigns are always shown unless Manage Campaigns in Salesforce is enabled.)

Campaign record types enabled for connection

Select the Salesforce campaign record types you use for your business-to-business marketing. Existing and new Salesforce campaigns that are connected to Pardot are stored in Engagement History. [Learn More](#)

Master Record Type