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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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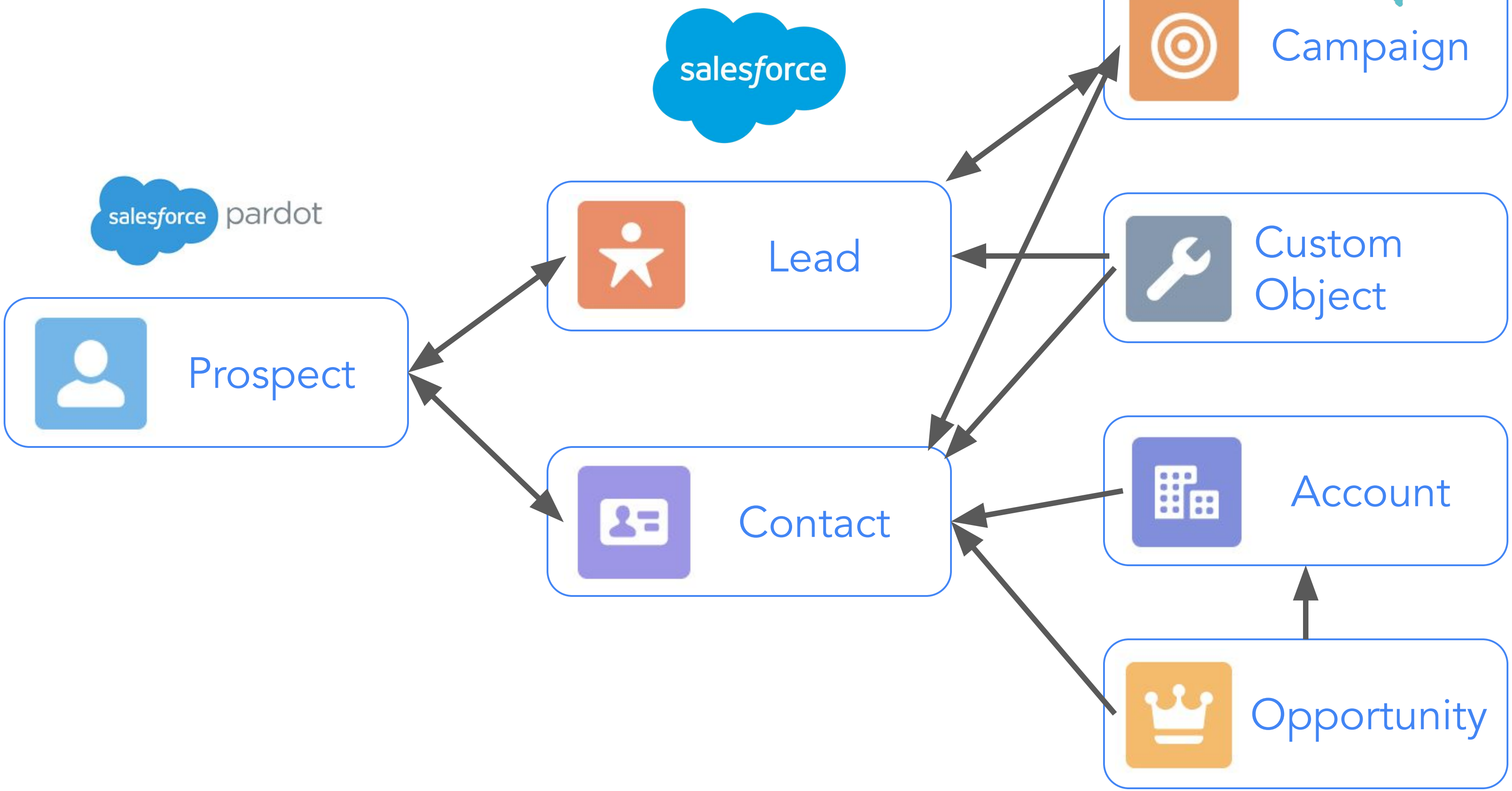
Marketing Cloud Account Engagement

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

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

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

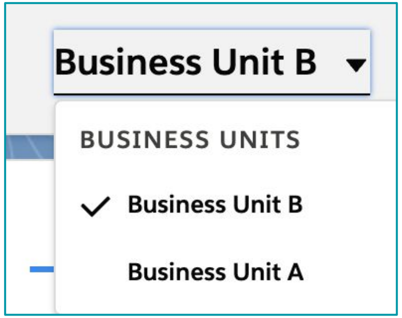
- Custom permissions that won't affect users
- Won't have to change connector user when someone leaves the company

Allows you to pause the connector

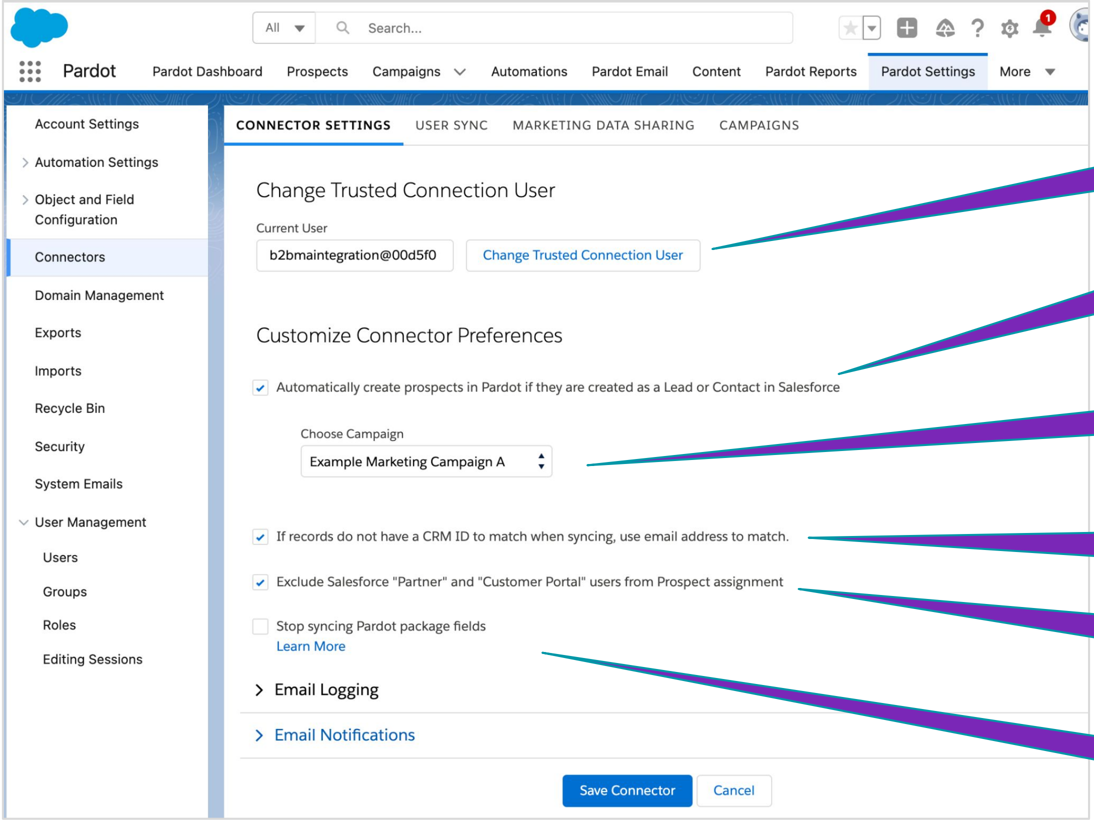
- Beneficial when mass updates are happening in one or both systems

Access to the Business Unit Switcher

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



Connector Settings



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

Sync all eligible Leads/Contacts to Pardot

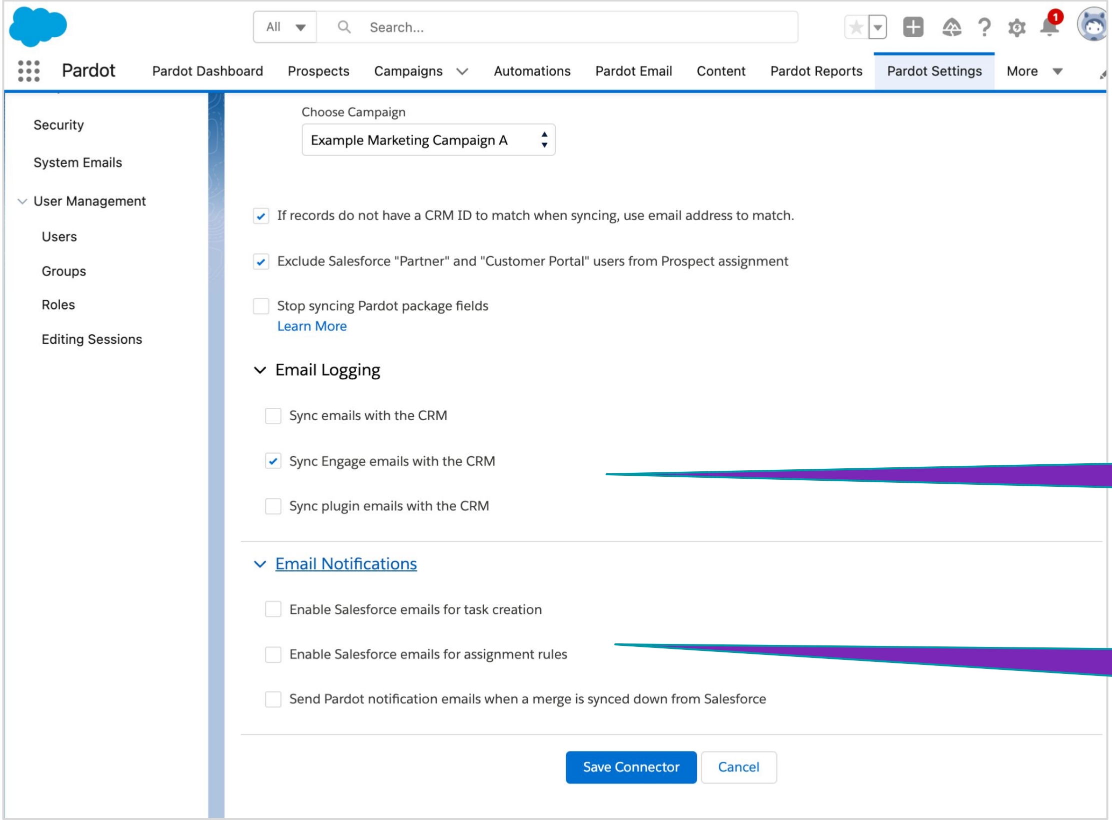
This will be your Source campaign for any Prospects who originated from Salesforce

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

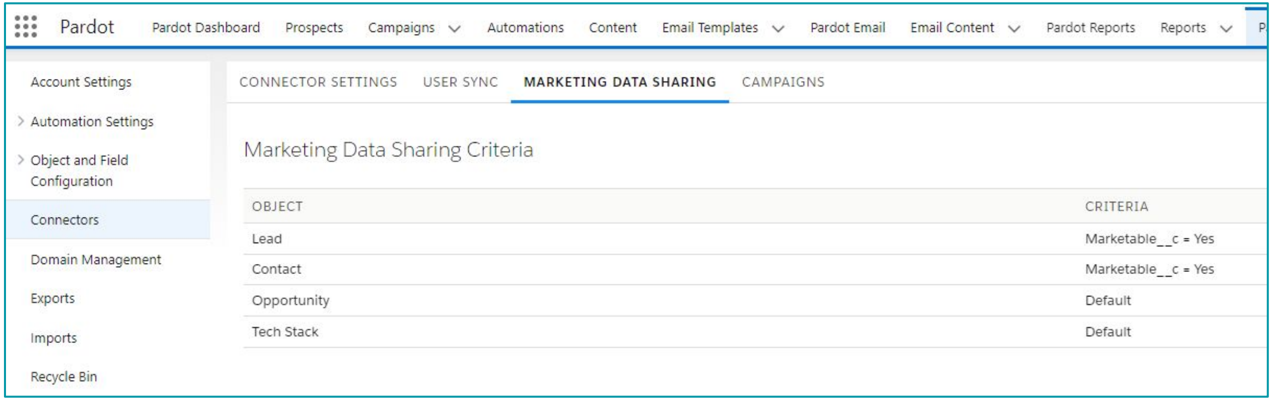


Has Storage implications for Salesforce

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!



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
[ ] Contract Manager	Marketing
[ ] Custom Marketing User	Marketing
[ ] Identity User	Marketing
[x] Marketing User	Administrator
[ ] Minimum Access - Salesforce	Marketing
[ ] Read Only	Marketing
[ ] Sercante Identity User	Marketing
[ ] Sercante Standard User	Marketing
[ ] Sercante System Administrator	Marketing
[ ] Solution Manager	Marketing
[x] Standard User	Administrator
[x] System Administrator	Administrator

- [x] 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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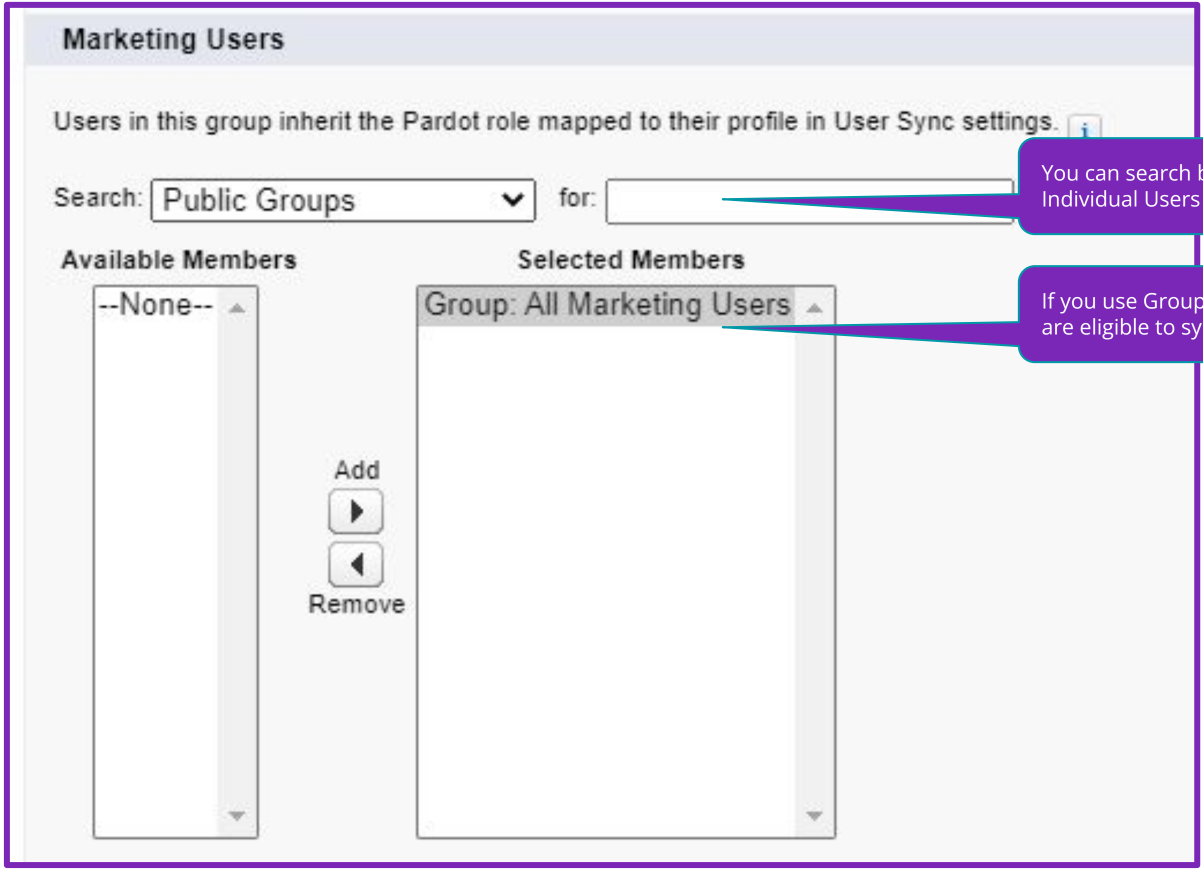
User Sync - In Salesforce



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

- [x] 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.

- [x] Use Salesforce to manage all campaigns

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

Limit Campaign Creation by Date

Pick a Date

Each time you edit a campaign in Salesforce, its replicated Pardot campaign is created or updated to reflect the change. To reduce the num
Pardot.)

- [x] 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 ı
marketing assets and is stored in Engagement History. Learn More

- [x] Master Record Type