Account Engagement Setup Implementation Guide

Salesforce, Spring '24



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INTRODUCTION

Account Engagement is your solution for B2B marketing automation and includes powerful tools that generate leads so your sales team can close more deals. This guide helps you get your Account Engagement business unit online and ready for your marketing team to build out marketing assets and get campaigns underway.

Setup includes tasks that often span multiple teams, so it's important to have everything you need in place before you begin. Use the planning worksheet in this guide to get organized and identify who you need to successfully set up Account Engagement. If you're setting up more than one business unit, we recommend you complete an implementation plan for each business unit.



Tip: Business unit setup requires both a Salesforce admin and an Account Engagement admin. To reduce the need for multiple admins, you can create a custom permission set in Salesforce to delegate Account Engagement tasks to a marketing admin. See Designate an Admin for Marketing Setup Tasks.

PLAN YOUR ACCOUNT ENGAGEMENT IMPLEMENTATION

Print or save this worksheet to help you map out your implementation from start to finish. If you're using multiple business units, make a copy for each one. Some setup tasks require both a Salesforce admin and an Account Engagement admin to complete. We recommend your implementation stakeholders plan and collaborate closely to execute setup tasks.

Download the Account Engagement Implementation Planning Worksheet

SEE ALSO:

- Designate an Admin for Marketing Setup Tasks

INSTALL THE APPEXCHANGE PACKAGE AND CREATE AN ACCOUNT ENGAGEMENT BUSINESS UNIT

First, your Salesforce admin must install the AppExchange package for Account Engagement, then create a business unit in Marketing Setup. After you assign an admin for your business unit, set up Salesforce User Sync.

Install the AppExchange Application for Account Engagement

Before setting up your Salesforce connector, install the Account Engagement (Pardot) AppExchange package in your Salesforce org.

Enable Account Engagement in Salesforce

A Salesforce admin must enable new business units and appoint an Account Engagement admin. If you have multiple business units, appoint an Account Engagement admin to each unit.

Install the AppExchange Application for Account Engagement

Before setting up your Salesforce connector, install the Account Engagement (Pardot) AppExchange package in your Salesforce org.

Important: Don't install the package directly from AppExchange. You must install the package as described here.

1. Get the installation link.

   This package updates your Salesforce org with a custom application, custom tab, and custom fields under leads and contacts. To display all fields, modify your view.
2. Review actions, and click **Install**.
3. On Step 2 of the install wizard (Choose security level), select **Grant access to admins only**.

USER PERMISSIONS

To install the Pardot package:

- Download AppExchange Packages (in Salesforce)

Enable Account Engagement in Salesforce

A Salesforce admin must enable new business units and appoint an Account Engagement admin. If you have multiple business units, appoint an Account Engagement admin to each unit.

Important: The admin assigned to set up the business unit can't be changed and their name can't be edited. If that user is removed from Account Engagement or their role is updated, their name remains as a historical record on the business unit setup page.

1. From Marketing Setup, under Business Unit Setup, click **Assign Admin**.
2. Name your business unit and assign your Account Engagement admin. If you're working with multiple business units, we recommend setting up one business unit at a time.
3. Save your changes. After you save, the admin receives an email to start the setup process for their business unit.
4. In Marketing Setup click **Setup Assistant** and turn on Account Engagement in your Salesforce org to make the Lightning app available only to your Account Engagement admins.

EDITIONS

Available in: All Account Engagement Editions

USER PERMISSIONS

To enable Account Engagement for your org:

- Customize Application and Modify All Data

To create business units:

- Customize Application and Modify All Data

After you complete provisioning and admin assignment, contact your Account Engagement admin to make sure they received the email to set up their assigned business unit. Work closely with your Account Engagement admin to complete key setup tasks, such as setting up Salesforce User Sync.

SET UP SALESFORCE USER SYNC

Salesforce User Sync makes it easy to create and manage Account Engagement users from Salesforce, so we strongly recommend you set it up as part of your implementation. To set up User Sync, your Salesforce admin assigns users to Account Engagement from Salesforce. Then, your Account Engagement admin transfers user management to Salesforce.

User Sync Basics

User Sync moves Account Engagement user access settings to Marketing Setup in Salesforce. Synced user records in Account Engagement are read-only and inherit information from Salesforce.

Identify or Create Users in Salesforce

Before you set up Salesforce User Sync, make sure you know which users need access to Account Engagement. If you're brand new to Salesforce, create new users that you then assign to Account Engagement.

Assign Salesforce Users to Account Engagement

First, have your Salesforce admin assign Salesforce users to Account Engagement. We recommend that you begin with the users who manage the implementation. After users are assigned, transfer user management to Salesforce and return to Marketing Setup at any time to assign more users.

Transfer User Management to Salesforce

After your Salesforce admin has assigned users to Account Engagement, your Account Engagement admin can map Salesforce profiles to user roles in Account Engagement. Then, the Account Engagement admin transfers user management to Salesforce to create an Account Engagement profile for users assigned from Salesforce.

User Sync Basics

User Sync moves Account Engagement user access settings to Marketing Setup in Salesforce. Synced user records in Account Engagement are read-only and inherit information from Salesforce.

Note: Pardot is now known as Marketing Cloud Account Engagement. We wish we could snap our fingers to update the name everywhere, but you can expect to see the previous name in a few places until we replace it, including in the app itself.

Process Overview

If you use the legacy version of User Sync, make sure you also review Considerations for Moving to the Latest Version of User Sync. If you're not sure what your User Sync status is, see Find the Right User Sync Documentation.

To take advantage of Salesforce User Sync, first assign Salesforce users to Account Engagement and then transfer user management to Salesforce. This process requires a Salesforce admin and an Account Engagement admin. Depending on the structure of your business, it's possible you need more than one person to complete all the tasks.

This video walks through User Sync setup: Manage Engagement Users with Salesforce User Sync (English Only).

User Management

Here's how user management works after user management is transferred to Salesforce.

- An Account Engagement user record is created for any user assigned to Account Engagement in Salesforce. You can assign users individually, or based on public group, role, or role and subordinates.
- The Salesforce user record is the source of truth. All Account Engagement user fields update to match the Salesforce record.
- When a user sends an email in Account Engagement, the email is sent from the email address on their Salesforce user record.
- Account Engagement user alerts and notifications are sent to their Salesforce email.
- If an assigned user is in the recycle bin in Engagement, the user record is restored.
- To delete an Account Engagement user, unassign them in Salesforce. Unassigning a user sends their record to the recycle bin in Engagement.
- If there's an Account Engagement user with the same email address as a Salesforce user but they're not mapped, User Sync skips them. A new Account Engagement user record isn't created and the existing user profile isn't synced.
- Changes to user records in Salesforce typically sync within 10 minutes. If you have tens of thousands of users, the sync can take up to an hour.

Salesforce Profiles and Account Engagement Roles

When you assign users to Account Engagement, you add them to the Marketing Users group or the Sales Users group. User group assignments can be used for sharing rules, and they correspond to default Account Engagement role assignments.

Salesforce profiles are mapped one-to-one to Account Engagement user roles, but some scenarios require a more granular Salesforce profile. If your users that share a Salesforce profile need different levels of access in a business unit, you can give a user a more granular profile.

Example: Jon and Deepa both have the Marketing profile in Salesforce. Jon needs the Marketing Manager role in the Europe business unit, and Deepa needs the Marketing role. Because Jon and Deepa share the original profile, and profiles are mapped one-to-one to user roles, the Salesforce admin creates a unique profile for Jon. The Europe business unit admin maps the new profile to the correct Account Engagement user role.

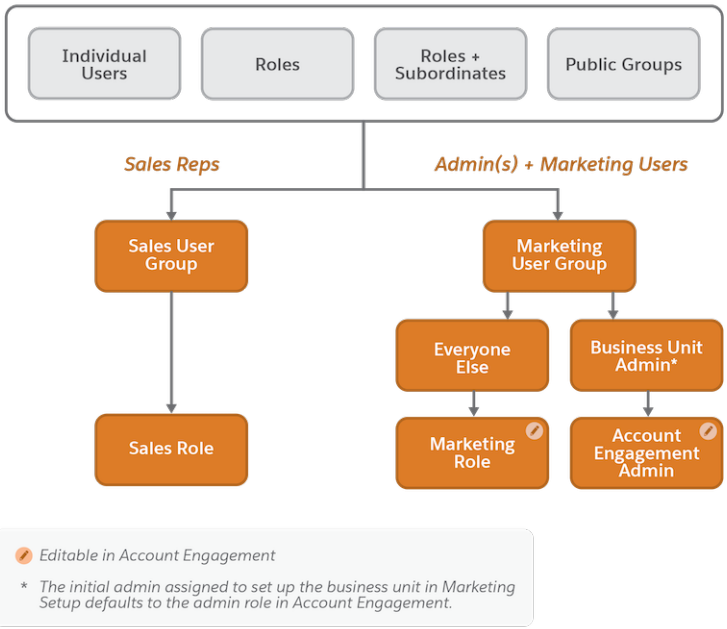
Important: Assign admins and most other Account Engagement users to the Marketing User group in Salesforce. The Sales User group is only for sales reps who need restricted access to Account Engagement.

After users are assigned to Account Engagement, the Account Engagement admin can update the profile-to-role mapping table for the Marketing User group, or leave the default mapping in place.

Here's how roles are determined by default:

- Users in the Sales Users group always inherit the Sales role in Account Engagement. This role mapping can't be edited.
- Users in the Marketing Users group have their Salesforce profile mapped to the Marketing role in Account Engagement. This mapping is editable.
- If the Account Engagement admin who created the business unit is in the Marketing Users group, they retain the Account Engagement admin role.

This chart shows how user assignments translate to default roles. The default Account Engagement role is editable for all users assigned to the Marketing Users group in Salesforce.



Identify or Create Users in Salesforce

Before you set up Salesforce User Sync, make sure you know which users need access to Account Engagement. If you're brand new to Salesforce, create new users that you then assign to Account Engagement.

SEE ALSO:

- Add a Single User
- Add Multiple Users

Assign Salesforce Users to Account Engagement

First, have your Salesforce admin assign Salesforce users to Account Engagement. We recommend that you begin with the users who manage the implementation. After users are assigned, transfer user management to Salesforce and return to Marketing Setup at any time to assign more users.

Assigned users don't have access until you set up permissions for Account Engagement Lightning App. Users assigned to the Sales Users group in Salesforce are given the Sales role in Account Engagement. Changing a user's role must be done in Salesforce.

1. From Marketing Setup, in the Quick Find box, enter `Business`, and then select **Business Unit Setup**.
2. Next to your business unit, click **Manage Users**.
3. Click **Edit User Assignments**.
4. Use the dropdowns to add users to the Marketing Users group and the Sales Users group.
5. Save your changes. To see a list of your assigned users, click **View All Users**.

EDITIONS

Available in: Account Engagement business units created after the Summer '20 release

USER PERMISSIONS

To assign Salesforce users to business units:

- Customize application and manage users

After users are assigned, the Account Engagement admin can transfer user management to Salesforce where a profile is created for each assigned user.

Transfer User Management to Salesforce

After your Salesforce admin has assigned users to Account Engagement, your Account Engagement admin can map Salesforce profiles to user roles in Account Engagement. Then, the Account Engagement admin transfers user management to Salesforce to create an Account Engagement profile for users assigned from Salesforce.

1. Open the Salesforce Connector page.
   - In Account Engagement, select **Admin** and then select **Connectors**. Click next to the Salesforce Connector, and select **Edit**.
   - In the Lightning app, select **Account Engagement Settings** and then **Connectors**. Click next to the Salesforce connector, and select **Edit Settings**.
2. Click the **User Sync** tab.
3. Review the default user roles for each Salesforce profile. If needed, use the dropdowns to change the assigned roles. You can come back and edit the profile-to-role mapping table later.
4. Save your changes, and then click **Opt In** to transfer user management to Salesforce.

After user management is transferred, a profile is created for each user assigned in Salesforce. User changes in Salesforce typically take about 10 minutes to take effect.

EDITIONS

Available in: Account Engagement business units created after July 20, 2020 or with Salesforce User Sync enabled before that date

USER PERMISSIONS

To transfer user management to Salesforce:
- Account Engagement Administrator role

SET UP THE ACCOUNT ENGAGEMENT LIGHTNING APP

To grant users access to Account Engagement, set up the Account Engagement Lightning app. The Lightning app offers an elevated integration experience and allows your sales and marketing teams to work side-by-side on one platform.

Give Users Access to the Account Engagement Lightning App
An admin must enable the Account Engagement Lightning App, and then the required permission to users.

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An admin must enable the Account Engagement Lightning App, and then the required permission to users.

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Before you start this task:

- Enable Account Engagement.
- Verify that your Account Engagement and Salesforce users are linked. We strongly recommend using Salesforce User Sync.

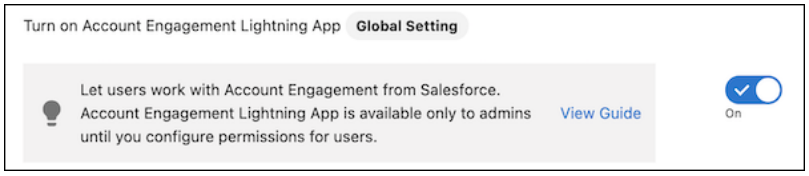
EDITIONS

Available in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions with any Account Engagement Edition

USER PERMISSIONS

To enable the Account Engagement Lightning app:
- Customize Application

To edit app permissions:
- Manage Profiles and Permission Sets



1. Give users access to the B2BMA Canvas connected app.
   a. From Salesforce Setup, in the Quick Find box, enter `Connected`, and then select **Manage Connected Apps**.
   b. Select **b2bma_canvas**.
   c. Click **Manage Profiles** or **Manage Permission Sets** to assign the connected app to users who need access.
2. Assign the Account Engagement User, Sales Cloud User, Service Cloud User, or CRM User permission set.
   a. From Marketing Setup, in the Quick Find box, enter `Permission Sets`, then select **Account Engagement User**, **Sales Cloud User**, **Service Cloud User**, or **CRM User** from the list.
   b. Click **Manage Assignments**.

c. Click **Add Assignments** and choose all users who need access.

Note: If you'd rather use a custom permission set, create and assign one with the **Allow access to all Pardot features** app permission. For maximum flexibility, don't choose a license for the new permission set. To access the Lightning App, users still need the Account Engagement User, Sales Cloud User, Service Cloud User, or CRM User permission set license.

3. Make the Lightning App visible to profiles.
   a. From Salesforce Setup, in the Quick Find box, enter `App Manager`, and then select **App Manager**.
   b. Find the Account Engagement app with the App Type `Lightning`, and then edit it.
   c. Click **User Profiles**, and then select all profiles that need access to the app.

After the app is enabled, it appears in the App Launcher for all users with a Sales Cloud, Service Cloud, or CRM user seat who have the app permission assigned.

TRACK PROSPECT ENGAGEMENT IN SALESFORCE

Your campaigns track valuable engagement data that can tell you how well your marketing assets resonate with your customer base. When you bring all of the activity types and metrics in one place, you have a collection of features called Engagement History. Decide what Account Engagement data is most valuable to you and your users, and surface it throughout Salesforce.

Engagement History is an umbrella term for a variety of features–engagement metrics overviews, engagement activity feeds, and data visualization.

Note: Engagement History Dashboards aren't supported in Account Engagement Sandboxes.

EDITIONS

Available in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions with Account Engagement **Growth**, **Plus**, **Advanced**, or **Premium** Edition Edition

Add the Matched Leads Lightning Component

Use the Matched Leads Lightning component to find and convert engaged leads from an account record in Salesforce. The component lists the most relevant account leads ordered by level of engagement.

Comparison of Engagement History Features

Engagement History is a generic term for a collection of fields, related lists, and other Lightning components that make it possible to show valuable prospect engagement data on your most used records.

Add the Matched Leads Lightning Component

Use the Matched Leads Lightning component to find and convert engaged leads from an account record in Salesforce. The component lists the most relevant account leads ordered by level of engagement.

1. From Setup, in the Quick Find box, enter `Lightning App Builder`, and then select **Lightning App Builder**.
2. Select the page where you want to add the component, and click **Edit**.
3. In the Components list, enter `Matched Leads`, and then select **Matched Leads**.
4. Drag the **Matched Leads** component where you want it to appear in the page layout.
5. Save your work.
6. To specify who can use the page layout, click **Activation**, and then enter the assignment details.

EDITIONS

Lightning App Builder available in: both Salesforce Classic and Lightning Experience

Lightning Home and utility bar pages available in: Lightning Experience

Lightning app and record pages available in: both the Salesforce mobile app and Lightning Experience

Email application pane pages available in: both Salesforce Classic and Lightning Experience

Available in: **Group**, **Essentials**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To add the Matched Leads component:

- Customize Application

Comparison of Engagement History Features

Engagement History is a generic term for a collection of fields, related lists, and other Lightning components that make it possible to show valuable prospect engagement data on your most used records.

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Note:

- All Engagement History components require a CRM User, Sales Cloud User, or Service Cloud User permission set.

USER PERMISSIONS

To use Engagement History:

- Account Engagement User, CRM User, Sales Cloud User, or Service Cloud User permission set

- The majority of Engagement History components are available with all Account Engagement editions. Engagement History Dashboards require Growth, Plus, Advanced, or Premium edition.
- Components using the List Emails object include automated emails from Engagement Studio, completion actions, and automation rules. They don't include operational emails.
- Objects marked in this table with an asterisk (*) show engagement history data by default.

Feature	Available On...	Data Storage	Prerequisites
Metrics Fields	• Campaign • Marketing Link* • Marketing Form* • Landing Page* • List Email	Salesforce	• Connected Campaigns • Field-level security: Access to engagement history metrics
Related List (Marketing Assets)	Campaign	Salesforce	• Connected Campaigns
Related List (Activities)	• Lead • Contact • Account • Person Account • List Email • Marketing Link* • Marketing Form* • Landing Page*	Account Engagement	• Logged in to Account Engagement via Salesforce SSO
Engagement History Metrics Lightning Component	Campaign	Salesforce	• Connected Campaigns
Engagement History Custom Lightning Component	• Lead • Contact • Person Account	Account Engagement	• Logged in to Account Engagement via Salesforce SSO
Engagement History Dashboard Lightning Component	• Campaign • Account • Lead • Contact • Person Account • Opportunity	CRM Analytics platform This data is updated every 8 hours.	• Pardot permission set • Connected Campaigns (for a dashboard on campaign records only)

MAP ACCOUNT ENGAGEMENT AND SALESFORCE FIELDS

To make sure Account Engagement and Salesforce share data properly, edit your lead and contact page layouts in Salesforce and map Salesforce and Account Engagement fields.

Map Custom Lead Fields to Contact Fields

Mapping fields in Salesforce ensures that the contact record pulls in all Account Engagement data from the lead record during conversion.

Add Standard Fields to Lead and Contact Pages

To get a full view of your customer, you can add marketing engagement data to your lead and contact records. Add standard fields from Account Engagement onto your lead and contact page layouts.

Create Custom Prospect Fields

When the default fields in Account Engagement don't capture the prospect data you need, create your own custom fields. You can map and sync your custom fields with the CRM.

Map Salesforce and Account Engagement Custom Fields

To allow syncing, map prospect and account custom fields.

Show Account Engagement Data in Salesforce

The AppExchange application adds Account Engagement fields and Visualforce pages, but they're not displayed automatically. To display them, add them to your Salesforce lead and contact page layouts.

Map Custom Lead Fields to Contact Fields

Mapping fields in Salesforce ensures that the contact record pulls in all Account Engagement data from the lead record during conversion.

Note: Pardot is now known as Marketing Cloud Account Engagement. We wish we could snap our fingers to update the name everywhere, but you can expect to see the previous name in a few places until we replace it, including in the app itself.

Important: Don't map the Pardot URL lead field and Pardot URL contact field. Mapping these fields to each other creates duplicate prospects and breaks Visualforce pages.

1. Navigate to the object management settings for leads.
2. In the Lead Custom Fields & Relationships section, click **Map Lead Fields**.
3. Click the **Contact** tab, and map the fields.
4. Save your work.

USER PERMISSIONS

To map lead fields:

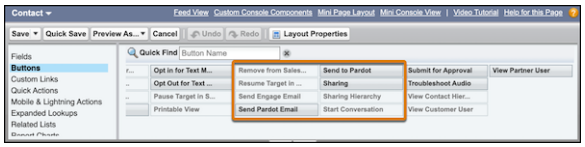
- Customize Application (in Salesforce)

Add Standard Fields to Lead and Contact Pages

To get a full view of your customer, you can add marketing engagement data to your lead and contact records. Add standard fields from Account Engagement onto your lead and contact page layouts.

1. Find the Lead or Contact page layout.
   - If you're using Lightning Experience, from Setup, in the Quick Find box, enter `Object Manager`, and then select **Object Manager**. Click the name of the object (Lead or Contact) that you want to manage, and scroll to the Page Layouts section.
   - If you're using Salesforce Classic, from Setup, in the Quick Find box, enter the object name (Lead or Contact), and then select **Page Layouts**.
2. Open the layout that you want to edit.
3. In the Page Layout Builder, select **Fields**, and then scroll to find the Account Engagement fields.

   Pardot is now known as Marketing Cloud Account Engagement. We wish we could snap our fingers to update the name everywhere, but you can expect to see the previous name in a few places until we replace it, including in the app itself.
4. Drag the fields onto your layout.
5. To add Account Engagement action buttons to the layout, select **Buttons**, and then drag the buttons to your layout.



6. Save your work.
7. To preview the updated page layout, navigate to a lead or contact record, and then confirm that the selected fields or buttons appear.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Page layouts available in: all editions

Creation and deletion of page layouts available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To add standard fields:
- Customize Application

Create Custom Prospect Fields

When the default fields in Account Engagement don't capture the prospect data you need, create your own custom fields. You can map and sync your custom fields with the CRM.

1. Open the Prospect Fields page.
   - In Account Engagement, select **Admin** > **Configure Fields** > **Prospect Fields**.
   - In the Lightning app, select **Account Engagement Settings** > **Object and Field Configuration** > **Prospect Fields**.
2. Click **+ Add Custom Field**.
3. Name the field. The name is used internally for identification, and isn't visible to prospects.
4. Don't edit Custom Field ID. This ID isn't visible to prospects.
5. Configure field settings.

EDITIONS

Available in: All Account Engagement Editions

USER PERMISSIONS

To create custom fields:
- Account Engagement Administrator role

6. When finished, click **Create custom field** to save.

Map Salesforce and Account Engagement Custom Fields

To allow syncing, map prospect and account custom fields.

Keep these considerations in mind when mapping fields.

- Before you can map custom fields, create the corresponding custom field in Account Engagement.
- If a Salesforce field is already mapped, it doesn't display in the dropdown.
- Custom field mapping isn't case sensitive. For example, the two custom fields Account_Type and account_type on the contact record must map to the same field on the prospect record.
- To map a custom field on both the lead object and contact object to the same Account Engagement field, the API name of the Salesforce fields must be identical.
- Account Engagement fields don't sync with lookup or geolocation Salesforce field types. Learn how sync behavior works.
- Don't map number type fields to Salesforce phone type fields. Phone fields contain non-number characters and don't sync correctly. Instead, map Salesforce phone type fields to text type fields.

USER PERMISSIONS

To map fields:
- Account Engagement Administrator role

1. Open the Prospect Fields page.
   - In Account Engagement, select **Admin** > **Configure Fields** > **Prospect Fields**.
   - In the Lightning app, select **Account Engagement Settings** > **Object and Field Configuration** > **Prospect Fields**.
2. From the Salesforce Field Name dropdown, choose the field you want to map.
3. To sync field setting changes from Salesforce, select **Keep this field's type and possible values (for dropdowns, radio buttons, checkboxes) in sync with the CRM**.
4. (Optional) Edit sync behavior.

Repeat these steps for each custom field you want to sync.

Note: Mapping an Account Engagement custom field with a Salesforce field doesn't trigger a sync with the CRM.

Show Account Engagement Data in Salesforce

The AppExchange application adds Account Engagement fields and Visualforce pages, but they're not displayed automatically. To display them, add them to your Salesforce lead and contact page layouts.

Note: Pardot is now known as Marketing Cloud Account Engagement. We wish we could snap our fingers to update the name everywhere, but you can expect to see the previous name in a few places until we replace it, including in the app itself.

USER PERMISSIONS

To customize page layouts:
- Customize Application (in Salesforce)

1. Open a lead or contact page layout for editing.
2. Add the Account Engagement custom fields to the page layout.
   a. Add a section to the layout.
   b. Name the section.
   c. Select **2-Column**, and click **OK**.

   d. Return to the Fields section of the drag-and-drop editor, and scroll right to locate the custom fields.

   e. Drag all the custom fields in to the new section.

   f. (Optional) Drag the Google Analytics fields to the section.

3. Add Account Engagement activities and list membership to your layout.

   a. Add a section to the layout.

   b. Name the section.

   c. Select **1-Column**, and click **OK**.

   d. In the editor, scroll to the Visualforce Pages section.

   e. Drag Pardot Activities, Pardot List Membership, and Pardot Social Data to the new section.

4. Save your work.

Repeat these steps for lead and contact page layouts.

MANAGE AND UNPAUSE THE SALESFORCE CONNECTOR

New Account Engagement business units come equipped with Version 2 of the Salesforce connector, which is created in a paused state. There are a few things we recommend you have set up before you unpause the connector and begin syncing data with Salesforce.

Set Up Connected Campaigns

It's a great idea to connect your Account Engagement and Salesforce campaigns. You can save time, reduce clutter, and get access to valuable cross-product features. For example, work with campaign influence attribution models, Engagement History, and Einstein Campaign Insights for a complete view of your business. Plus, you can work with prospects and data without leaving Salesforce.

Define Marketing Data Sharing Rules

If you have Account Engagement Advanced or Premium edition, you can use Marketing Data Sharing rules to define what data you want to sync with Salesforce objects.

Configure and Unpause the Salesforce Connector (v2)

Version 2 of the Salesforce connector is created in a paused state. An Account Engagement admin must configure the connector and unpause it to begin syncing data.

SEE ALSO:

Salesforce Connector Settings

Set Up Connected Campaigns

It's a great idea to connect your Account Engagement and Salesforce campaigns. You can save time, reduce clutter, and get access to valuable cross-product features. For example, work with campaign influence attribution models, Engagement History, and Einstein Campaign Insights for a complete view of your business. Plus, you can work with prospects and data without leaving Salesforce.

SEE ALSO:

Connected Campaigns Implementation Guide

Define Marketing Data Sharing Rules

If you have Account Engagement Advanced or Premium edition, you can use Marketing Data Sharing rules to define what data you want to sync with Salesforce objects.

Note: Sometimes, assigned users have more access to Salesforce data in Account Engagement than they do in Salesforce. To restrict access, manually create sharing rules that match your Marketing Data Sharing rules and apply them to the Account Engagement marketing user group.

SEE ALSO:

Marketing Data Sharing

Configure and Unpause the Salesforce Connector (v2)

Version 2 of the Salesforce connector is created in a paused state. An Account Engagement admin must configure the connector and unpause it to begin syncing data.

1. Open the Salesforce Connector page.
   - In Account Engagement, select **Admin** and then select **Connectors**. Click next to the Salesforce Connector, and select **Edit**.
   - In the Lightning app, select **Account Engagement Settings** and then **Connectors**. Click next to the Salesforce connector, and select **Edit Settings**.
2. Review your connector settings.

   The connector uses the integration user to sync. If you want to sync selected records, change the connector user to a user with the appropriate permissions or set up Marketing Data Sharing before unpausing.
3. To begin syncing, click , and then select **Unpause**.

Trigger the Initial Prospect Sync

After you've connected Salesforce and Account Engagement, import existing leads and contacts into Account Engagement. The connector doesn't automatically create prospects from existing Salesforce leads and contacts. After import, Account Engagement syncs the prospect record with the existing Salesforce lead or contact record. Future updates to records in either system then sync automatically.

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Note: If your business unit allows multiple prospects with the same email address, you must import by CRM ID to match leads and contacts with prospects. If you don't import by CRM ID, prospects imported by email address create duplicate leads or contacts in Salesforce. New Account Engagement business units allow multiple prospects with the same email address by default.

ADD A TRACKER DOMAIN IN ACCOUNT ENGAGEMENT

Use a tracker domain in Account Engagement to rewrite links and vanity URLs for tracking. To set up a tracker domain, work with an IT partner or a hosting provider to edit CNAME records.

Note: Pardot is now known as Marketing Cloud Account Engagement. We wish we could snap our fingers to update the name everywhere, but you can expect to see the previous name in a few places until we replace it, including in the app itself.

USER PERMISSIONS

To manage domains in Account Engagement:

- Account Engagement Administrator role

1. Open the Domain Management page.
   - In Account Engagement, select **Admin** and then select **Domain Management**.
   - In the Lightning app, select **Account Engagement Settings** and then **Domain Management**.
2. Click **Add Tracker Domain**.
3. Enter a tracking domain.

   If you use multiple tracker domains, make sure that each subdomain matches the root domain. For example, use go.siteA.com for the root domain siteA.com.
4. To allow Account Engagement form code to be used on web pages associated with the tracker domain, select **Allow iframed assets on this domain**.

   Allowing iframing only for specific domains is an added layer of security for your Account Engagement assets. You can control general iframing restriction in your Business Unit Settings.
5. Select a default campaign.
6. Work with your IT team or hosting provider to set up a CNAME record for the subdomain you want to use. Set the record to point to go.pardot.com.
7. Work with your IT team or hosting provider to add validation keys to the CNAME records for your root domain.

   To download a validation file in TXT format, click **Tools**. You can also copy the validation key for the domain and add it to a TXT file you create.
8. Wait for your DNS to propagate, which can take up to 24 hours.
9. From the Domain Management page, click the gear icon for your domain, and click **Validate**.

After you validate a domain, change the default protocol to HTTPS. Then, add the tracking code on your web pages.

Business units created after February 15, 2021 use HTTPS for tracker domains by default. If your business unit was created before February 15, 2021, enable SSL for individual tracker domains to secure them with HTTPS.

IMPLEMENT TRACKING CODE

Each Account Engagement campaign has its own unique tracking code. Add the code to a web page to track visitor and prospect activity. We recommend that you add the code to high-value pages only, such as landing pages or specific product listings. Don't place the code on more general pages like the home page on your website.

Important: This process implements first-party tracking code. Business units created after February 13, 2023 use first-party tracking by default. If you don't have first-party tracking set up, upgrade to first-party tracking or you can implement tracking code for third-party cookie tracking instead.

1. Open the Domain Management page.
   - In Account Engagement, select **Admin** and then select **Domain Management**.
   - In the Lightning app, select **Account Engagement Settings** and then **Domain Management**.
2. Scroll to the Tracking Code Generator and select the domain you want to generate code for.
3. (Optional) Override the default campaign.
4. Copy the code.
5. In your web page HTML, paste the campaign tracking code before the close body tag (`</body>`).

EDITIONS

Available in: All Account Engagement Editions

USER PERMISSIONS

To view tracking code:

- Account Engagement Administrator or Marketing role

ADD AND VERIFY A DOMAIN FOR EMAIL SENDING

To send emails in Account Engagement, you must add at least one verified sending domain. A domain is verified by a validation key that you add to your DNS records.

Note: Looking for a quick overview? Check out this demo video: Configure Email Sending Domain Authorization

1. Open the Domain Management page.
   - In Account Engagement, select **Admin** and then select **Domain Management**.
   - In the Lightning app, select **Account Engagement Settings** and then **Domain Management**.
2. Click **Add New Domain**.
3. Enter the domain that you want to send emails from, and click **Create domain**.
4. In the Actions column, click **Expected DNS Entries** and copy the validation key.
5. Work with your IT team to add the validation key to your DNS configuration as a TXT record for the specific domain or subdomain that you want to verify.
6. After you update your DNS configuration, return to the Domain Management page in Account Engagement.
7. In the Actions column, click **Check DNS Entries** to verify your domain.

Repeat these steps for each domain that you want to send from in Account Engagement.

EDITIONS

Available in: All Account Engagement Editions

USER PERMISSIONS

To manage sending domains:

- Account Engagement Administrator role

IMPLEMENT DKIM AUTHENTICATION FOR ACCOUNT ENGAGEMENT EMAIL

To improve your email deliverability, set up DomainKeys Identified Mail (DKIM) as an additional form of email authentication. Work with your IT team to implement DKIM for each domain that you want to send emails from in Account Engagement.

1. Open the Domain Management page.
   - In Account Engagement, select **Admin** and then select **Domain Management**.
   - In the Lightning app, select **Account Engagement Settings** and then **Domain Management**.
2. In the Email Sending Domains section, find the domain that you want to set up DKIM for, and click **Expected DNS Entries**.
3. Copy the DomainKey value.
4. Work with your IT team to add the DomainKey value to your DNS configuration as a TXT record.

After you correctly add your TXT record, your domain shows as verified. If you have errors, Account Engagement provides a link with details on the Domain Management page.

EDITIONS

Available in: All Account Engagement Editions

USER PERMISSIONS

To manage sending domains:

- Account Engagement Administrator role

NEXT STEPS

After you complete the technical setup for Account Engagement, you can set up any additional features you need. At this point, you can also bring in your marketing team to start using Account Engagement.

Create and Customize Marketing Assets

Bring in your marketing team to get started creating assets and using Account Engagement. Take advantage of Account Engagement's folders and file hosting capabilities, and build out forms, landing pages, templates, and automations for your business.

Recommended Features and Add-Ons

Here are some features we recommend for getting the most out of Account Engagement. Depending on your Account Engagement edition, these features are available as paid add-ons.

For more options on customizing how Account Engagement works with Salesforce, check out Connecting Pardot and Salesforce.

- **Business to Business Marketing Analytics Plus (B2BMA+):** B2BMA+ is a growing collection of intelligent marketing tools for B2B marketers. The Account-Based Marketing and Marketing Campaign Intelligence apps help you explore your data and identify improvements with Einstein Discovery.
- **Salesforce Engage:** Salesforce Engage lets marketing share its content with sales to boost your company's selling power. Sales reps can use marketing-approved email templates to contact prospects at the right moment and track the effectiveness of the messages in Salesforce.
- **Sandboxes for Account Engagement:** Use Sandboxes for Account Engagement to test configuration changes before implementing them in your production account. An Account Engagement sandbox is a business unit that is provisioned from a Salesforce sandbox. Sandboxes for Account Engagement are available in Advanced and Premium editions, and as a paid add-on in Plus edition.

SEE ALSO:

B2B Marketing Analytics Plus

Sales Emails and Alerts

Create a Sandbox for Account Engagement