Salesforce Connector Implementation Guide

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SETTING UP THE SALESFORCE CONNECTOR FOR BUSINESS UNITS PURCHASED BEFORE FEBRUARY 11, 2019

The Salesforce connector syncs prospect and opportunity data between Account Engagement and Salesforce. Account Engagement can sync with Salesforce Professional Edition and higher. If you purchased Account Engagement before February 11, 2019, follow these steps to install and configure the Salesforce connector.

Tip: Prefer a PDF? Download these instructions.

Considerations for Using the Salesforce Connector

Before you set up or unpause your connector, review considerations such as syncing fields and prospects, mapping users, and other setup tasks.

Considerations for Accounts That Allow Multiple Prospects with the Same Email Address

The most important aspect of the Salesforce sync is creating a one-to-one relationship between an Account Engagement prospect and a Salesforce lead, contact, or person account. The Salesforce connector uses CRM ID as the matching criteria for syncing in both directions in business units that allow multiple prospects with the same email address.

Step 1: Install the Salesforce Connector (v1)

After you install the AppExchange package, make sure that your connector user has the appropriate permissions. Then create the connector in Account Engagement. This process applies only to version 1 of the Salesforce connector.

Step 2: Configure Salesforce for the Salesforce Connector

During configuration, a Salesforce admin can map custom fields, add Account Engagement components to page layouts, and grant data access to users.

Step 3: Configure Account Engagement

To wrap up connector setup, map custom fields and users, test the connector, and perform an initial sync.

Considerations for Using the Salesforce Connector

Before you set up or unpause your connector, review considerations such as syncing fields and prospects, mapping users, and other setup tasks.

General

- You can have only one Salesforce connector per business unit.
- To view Account Engagement data in a clickjack-enabled Salesforce org, create a clickjack protection–compatible Visualforce page.
- To enable person account syncing, contact Salesforce Customer Support.
- When you import prospects into Account Engagement, the records sync with Salesforce. Unassigned prospects sync, but records aren’t created when there’s no matching email address in Salesforce.
- Syncs can occur as often as every 2 minutes. A larger volume of data takes longer to sync. If you’re seeing slower sync times, contact Salesforce Customer Support.

Connector Version 2

The following applies when using Connector version 2.

- When your Account Engagement business unit is provisioned, the connector is created in a paused state. Before unpausing the connector to begin syncing, review the settings and configure Marketing Data Sharing if you want to use it. Records don't sync until the connector is unpaused. Prospects can be manually synced with **Sync with CRM** on a prospect record, or **Send to Pardot** on a lead or contact record.
- The integration user has access to all records that can sync between the two systems. To control which records are shared, set up Marketing Data Sharing. If you don't want to use Marketing Data Sharing, you can change the connector user to a user with your preferred permissions. For details, see Account Engagement Integration User.
- If you link multiple business units to one Salesforce org, you can't use the integration user unless you're also using Marketing Data Sharing

Syncing Fields Between Systems

- Salesforce updates to prospect fields can trigger automation rules in Account Engagement, if those rules are related to the updated fields.
- Prospects that are assigned to a user in Account Engagement are created as a lead when the prospect isn't syncing with a record in Salesforce.

Mapping Users

Map Account Engagement users with assigned prospects to Salesforce users before syncing. If a prospect's assigned user isn't mapped to a Salesforce user, the prospect is assigned to the Salesforce connector user.

Syncing Prospects

- Account Engagement syncs on the individual level, not the company level.
- Records sync based on the CRM ID field. If a prospect doesn't have a corresponding Salesforce record, Account Engagement creates a lead to sync with.
- If a prospect record doesn't have a CRM ID and a record with the same email address exists in Salesforce, Account Engagement syncs to the record. If there are multiple records in Salesforce with the same email address as the prospect, Account Engagement syncs with the first record it finds.

Syncing Prospect Activity and Email

- Account Engagement activities, such as page views, form completions, site searches, and emails, appear in the Prospect Activities window in the prospect's CRM record. However, only emails are created as a CRM activity or task.
- List emails and one-to-one emails are recorded in the activity section of a CRM record.
- Email syncing is controlled in the connector settings.

Syncing Opportunities

- Opportunity activities are included in the default scoring (+50 points for created opportunity, –100 points for lost opportunity). When the connector is enabled, prospect scores update accordingly. Score updates can affect automation or lead assignment rules already in place.

- If you don't use opportunities in Salesforce, you can request to disable opportunity syncing. Contact Salesforce Customer Support for help.
- If Salesforce has duplicate records, the activity iframe appears in all the records. However, the Account Engagement data fields appear only in the synced record.

Considerations for Accounts That Allow Multiple Prospects with the Same Email Address

The most important aspect of the Salesforce sync is creating a one-to-one relationship between an Account Engagement prospect and a Salesforce lead, contact, or person account. The Salesforce connector uses CRM ID as the matching criteria for syncing in both directions in business units that allow multiple prospects with the same email address.

When Salesforce creates a lead, contact, or person account with a specific email address, a prospect is created with a matching CRM ID. Data from each record syncs according to the sync behavior defined for each field. Prospects are created only if the Salesforce connector user has permission to the record in Salesforce.

Sometimes a prospect doesn't have a CRM ID, and multiple records with the same email address exist in Salesforce. In this case, the prospect syncs to the record Account Engagement finds first.

When a prospect is created and it meets your criteria to begin syncing, a record is created based on your connector's settings.

Business units that allow multiple prospects with the same email address have fewer connector settings. The connector creates prospects when it finds new leads, contacts, or person accounts and syncs changes among those records. When the connector detects merged or deleted records in Salesforce, it updates the corresponding prospects and sends deleted records to the Account Engagement recycle bin.

Step 1: Install the Salesforce Connector (v1)

After you install the AppExchange package, make sure that your connector user has the appropriate permissions. Then create the connector in Account Engagement. This process applies only to version 1 of the Salesforce connector.

Install the AppExchange Application for Account Engagement

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

Assign the Connector User Permission Set

After the package is installed in your Salesforce org, you grant the connector user the Pardot Connector User permission set.

Assign Object Permissions to the Connector User

Because of Salesforce security restrictions, an admin must manually configure your connector user's permissions for Salesforce standard objects. These objects aren't covered by the Pardot Connector User permission set. This step applies only to Account Engagement business units with Salesforce connector v1, or business units using Marketing Data Sharing.

Add the Salesforce Connector in Account Engagement (v1)

Now that the app is installed and the connected user is configured, you're ready to create and configure the connector itself. This process applies only to version 1 of the Salesforce connector.

Install the AppExchange Application for Account Engagement

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

USER PERMISSIONS

To install the Pardot package:
- Download AppExchange Packages (in Salesforce)

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**.

Assign the Connector User Permission Set

After the package is installed in your Salesforce org, you grant the connector user the Pardot Connector User permission set.

USER PERMISSIONS

To assign permission sets:
- Assign Permission Sets

To edit object permissions:
- Manage Profiles and Permission Sets

  AND

  Customize Application

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.

Before you begin, make sure that the connector user has these permissions:

- API Enabled
- Manage Profiles and Permission Sets
- View All Users
- View Setup and Configuration

Apply the Pardot Connector User permission set only to your Account Engagement connector user. Don't assign the Engage permission set from this page. The Engage permission is assigned from the licensing page.

1. From Marketing Setup, enter `Users` in the Quick Find box, then select **Users**.
2. Select the connector user.
3. Scroll to Permission Set Assignments, and click **Edit Assignments**.
4. In the Available Permission Sets box, click **Pardot Connector User** to highlight it, then click the **Add** arrow button.
5. Save your work.

Assign Object Permissions to the Connector User

Because of Salesforce security restrictions, an admin must manually configure your connector user's permissions for Salesforce standard objects. These objects aren't covered by the Pardot Connector User permission set. This step applies only to Account Engagement business units with Salesforce connector v1, or business units using Marketing Data Sharing.

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The Account Engagement connector user needs these permissions for these standard objects. How you apply these permissions is up to you. For more information about permissions, see the User Permissions documentation.

Object Name	Object Permissions	Field Permissions
Accounts	View All	All standard and custom fields syncing with Account Engagement
Campaigns	Create/Edit/Read/View All	All standard and custom fields syncing with Account Engagement
CampaignMember	Create/Read/Edit	All standard and custom fields syncing with Account Engagement
Contacts	Create/Edit/Read/View All/Modify All	All standard and custom fields syncing with Account Engagement
Leads	Create/Edit/Read/View All/Modify All	All standard and custom fields syncing with Account Engagement
ObjectChangeLogs	View All/Modify All	All
Opportunity	View All	All standard and custom fields syncing with Account Engagement
Task	Edit Tasks	All standard and custom fields syncing with Account Engagement
Users	View All Users	All standard and custom fields syncing with Account Engagement

Note: To streamline future troubleshooting assign the View Setup and Configuration to your connector user.

Add the Salesforce Connector in Account Engagement (v1)

Now that the app is installed and the connected user is configured, you're ready to create and configure the connector itself. This process applies only to version 1 of the Salesforce connector.

1. Open the Connectors page.
    - In Account Engagement, select **Admin** and then select **Connectors**.
    - In the Lightning app, select **Account Engagement Settings** and then **Connectors**.
2. Click + **Add Connector**.
3. Click **Salesforce**.
4. Click **Create Connector**.
5. Log in to Salesforce using the connector user's credentials.
6. After you're logged in, click **Allow** to give the connector user access to your business unit.
7. Choose your connector settings.
8. Click **Finish**.

When Account Engagement can send and receive data to and from Salesforce, the connector is marked as verified.

USER PERMISSIONS

To add the Salesforce connector in Account Engagement:

- Account Engagement Administrator role

Step 2: Configure Salesforce for the Salesforce Connector

During configuration, a Salesforce admin can map custom fields, add Account Engagement components to page layouts, and grant data access to users.

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.

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.

Add Custom Buttons to Salesforce Page Layouts

Two custom actions are available on lead and contact pages: Send to Pardot and Send Pardot Email. To easily sync Salesforce leads or contacts with prospects in Account Engagement, use the Send to Pardot button. The Send Pardot Email button lets Salesforce users who are assigned the Pardot permission set to send a tracked email from Salesforce.

Adding Account Engagement Standard Actions to Salesforce

Add Account Engagement buttons and actions to Salesforce as standard actions in list views and on certain record pages. Quick action record buttons are only supported in production orgs, not in Salesforce sandboxes.

Add Scoring Category Scores to Page Layouts

Update page layouts to include scoring category fields on lead and contact records.

Give Users Access to Account Engagement Data in Salesforce

Apply the necessary permissions to any set included with the AppExchange package to any user who accesses or uses Account Engagement data in Salesforce.

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.

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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)

Show Account Engagement Data in Salesforce

USER PERMISSIONS

To customize page layouts:

- Customize Application (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.

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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.

Add Custom Buttons to Salesforce Page Layouts

USER PERMISSIONS

To customize page layouts:

- Customize Application

Two custom actions are available on lead and contact pages: Send to Pardot and Send Pardot Email. To easily sync Salesforce leads or contacts with prospects in Account Engagement, use the Send to Pardot button. The Send Pardot Email button lets Salesforce users who are assigned the Pardot permission set to send a tracked email from Salesforce.

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To use the Send to Pardot button, a user must be SSO-enabled.

1. Open a lead or contact page layout for editing.
2. In the editor, find the button to add.
    - In Lightning Experience, open the Mobile & Lightning Actions section.
    - In Salesforce Classic, open the Buttons section.

3. Drag the **Send to Pardot** button and **Send Pardot Email** button into the corresponding section of the page.
4. Save your work.

Repeat these steps for each lead and contact page layout.

Adding Account Engagement Standard Actions to Salesforce

USER PERMISSIONS

To create custom buttons:

- Customize Application

Add Account Engagement buttons and actions to Salesforce as standard actions in list views and on certain record pages. Quick action record buttons are only supported in production orgs, not in Salesforce sandboxes.

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Add actions to record pages in Salesforce in the Page Layout of the standard object such as the Lead or Contact object. To add actions to list views, customize a page layout from the management settings for the appropriate object.

To use these buttons, users must be assigned a Sales Cloud, Service Cloud, or CRM User permission set. These buttons don't create prospects unless you enable the Automatically create prospects in Account Engagement if they're created in Salesforce setting for the Salesforce connector.

Action	Availability in Salesforce
Add to Prospect List	Object Page Layouts • Lead • Contact List View Objects • Lead • Contact
Add to Engagement Studio List	Object Page Layouts • Lead • Contact List View Objects • Lead • Contact

Add Scoring Category Scores to Page Layouts

Update page layouts to include scoring category fields on lead and contact 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.

1. Open your lead or contact page layout for editing.
2. In the editor, click **Related Lists**.
3. Drag **Pardot Category Score** to the layout.
4. (Optional) Edit the Pardot Category Score properties to include only Scoring Category Name, Score, and Last Modified Date, and sort descending by score.

EDITIONS

Available in: Account Engagement **Plus**, **Advanced**, and **Premium** Editions

USER PERMISSIONS

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

Give Users Access to Account Engagement Data in Salesforce

Apply the necessary permissions to any set included with the AppExchange package to any user who accesses or uses Account Engagement data in 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.

To assign the Engage permission, use the licensing page.

1. From Marketing Setup, enter `Permission Sets` in the Quick Find box, then select **Permission Sets**.
2. Click **Pardot**.
3. Click **Manage Assignments**.
4. Click **Add Assignments**.
5. Select the users that you want to assign the permission set to.
6. Click **Assign**.

USER PERMISSIONS

To assign permission sets:
- Assign Permission Sets (in Salesforce)

Step 3: Configure Account Engagement

To wrap up connector setup, map custom fields and users, test the connector, and perform an initial sync.

Map Salesforce and Account Engagement Custom Fields
To allow syncing, map prospect and account custom fields.

Test the Salesforce Connector
After you set up the Salesforce Connector, you can test it to make sure that it syncs properly.

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.

Map Salesforce and Account Engagement Custom Fields

USER PERMISSIONS

To map fields:

- Account Engagement Administrator role

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.

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.

Test the Salesforce Connector

After you set up the Salesforce Connector, you can test it to make sure that it syncs properly.

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.

Test	Steps
Sync a new prospect with an existing lead or contact record	1. Create a prospect who exists in Salesforce. 2. To test manual sync, open the prospect record and click Sync with CRM. 3. To test the automatic sync, wait 10–15 minutes to see if the connector initiates a sync.
Sync a new prospect who doesn't exist in Salesforce	1. Create a prospect who doesn't exist in Salesforce. 2. Create a lead or contact record in Salesforce with the same email address.

Test	Steps
	3. From the prospect record, click Sync with CRM or wait 10–15 minutes to see if the connector initiates a sync.
Assign a prospect	1. Create a prospect who doesn't exist in Salesforce. 2. Assign the prospect to a Sales user. 3. From the prospect record, click Sync with CRM or wait 10–15 minutes to see if the connector initiates a sync.
Create a prospect from a Salesforce record	This test applies only if you have this connector setting enabled: Automatically create prospects in Pardot if they're created in Salesforce. 1. Create a lead or contact record. If your business unit doesn't allow multiple prospects with the same email address, use an email that doesn't exist in Account Engagement yet. 2. Wait 10–15 minutes to see if a prospect record is created.

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.

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.