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# No me llenes el Pardot

Integración prospects entre Pardot y  
Sales Cloud

*Málaga*



## VERIFY A CREDENTIAL

Salesforce certifications highlight an overall mastery of a specific role and are a great way to identify candidates for defined jobs and projects. Verify a credential to confirm skills and experience.

Verify Now



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# Paco Martínez

Trailblazer, 5x or 6x Certified Salesforce  
Developer and Marketing Cloud  
Consultant at @wamhello

Málaga

# Marketing & Sales alignment



How to achieve this goal?

Letting marketing and sales departments manage their prospect interactions and online marketing campaigns in one central platform.



**FIGHT**

# Marketing & Sales alignment



## Sales

¡Vaya mierda de leads  
me envías que no  
quieren comprar nada!



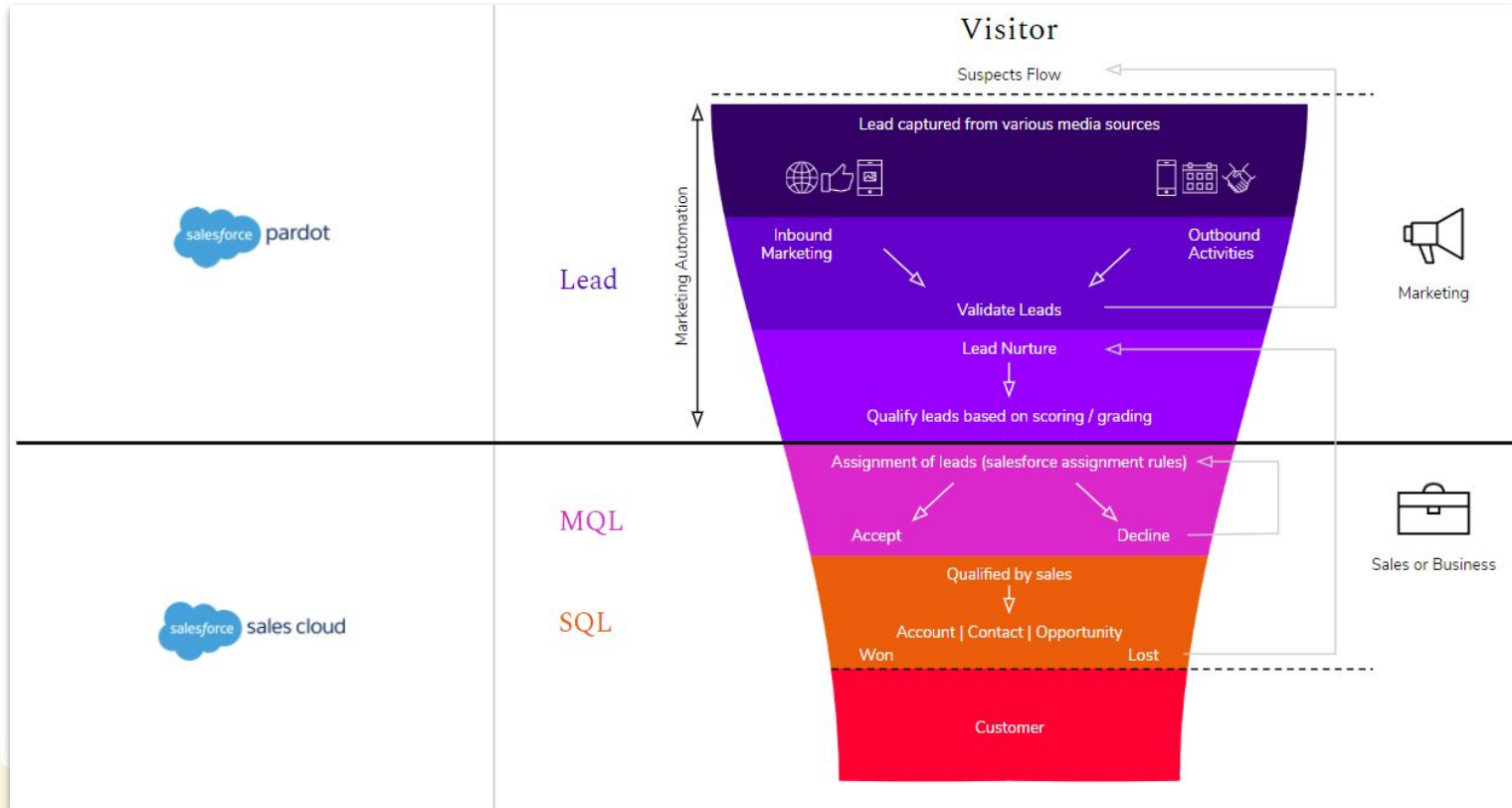
VS

## Marketing

Mira quien habla que  
me los envia con email  
sin validar y encima con  
Opted Out



# Sales Cloud & Pardot Schema



# Salesforce Integration



## MQL, SQL & Customer for Pardot

### **MQL**

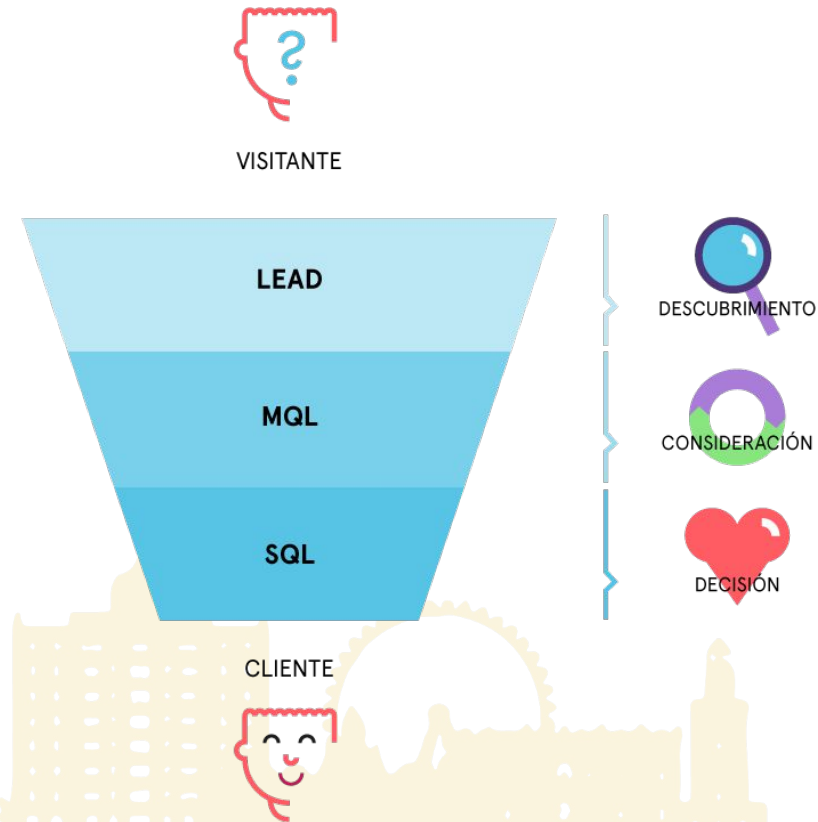
Prospect Assigned

### **SQL**

Prospect with an open opportunity

### **Customer**

Prospect with a won opportunity





# Salesforce Integration



## Pardot Salesforce Connector

Is not only install  
appexchange  
package





# Salesforce Integration



## Mapping Fields

Data interchange  
between Pardot &  
Sales Cloud

HOME > ADMINISTRATION

Prospect Fields

Custom Fields

Filter:

NAME	FIELD	SALESFORCE.COM FIELD NAME	TYPE
VAT Code	VAT_Code	VAT_Code__c	Text
Mobile phone	Mobile_phone	MobilePhone	Text
Primary contact	Primary_contact	Primary_contact__c	Text
Web Account Creation Date	Web_Account_Creation_Date		Text
Web Account Last Log-in Date	Web_Account_Last_Log_in_Date		Text

Showing 5

Default Fields

Filter:

NAME	FIELD	SALESFORCE.COM FIELD NAME	TYPE
Scoring Category Last Scored At	last_scored_at	pi__Pardot_Last_Scored_At__c	Date
Country	country	MailingCountry	Text
Email	email	Email	Text
Company	company	Company	Text

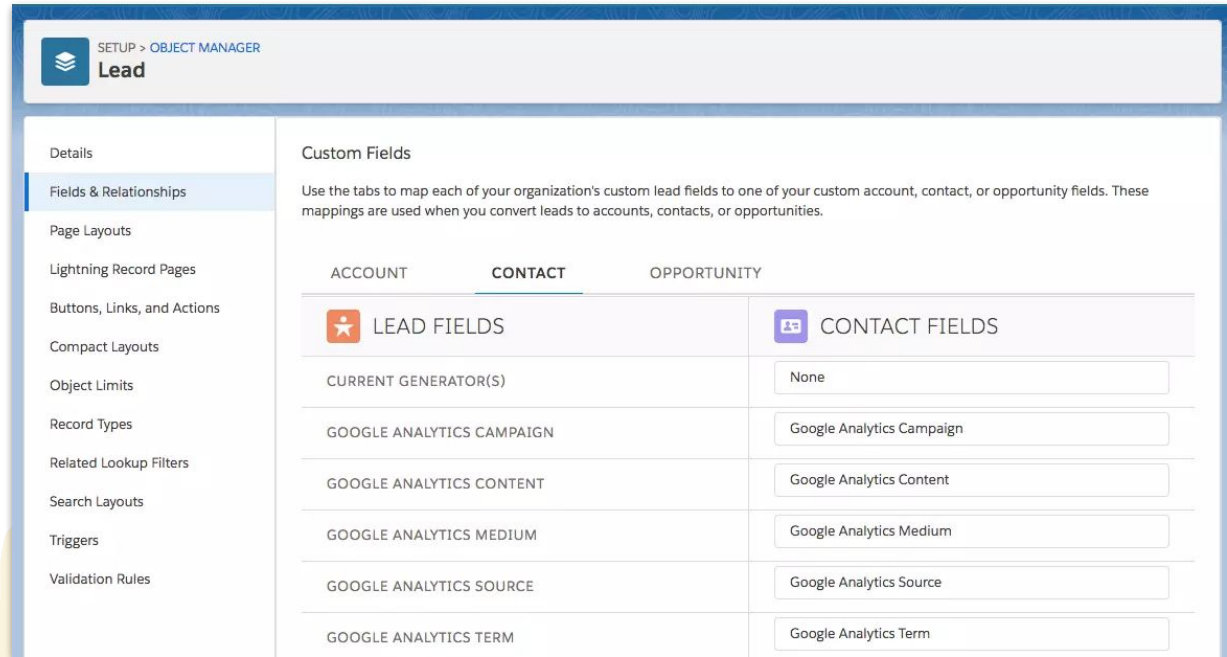
# Salesforce Integration





## Mapping Fields

From Lead to:

- Contact
- Account
- Opportunity



The screenshot shows the Salesforce Setup interface for mapping Lead fields to Account, Contact, or Opportunity fields. The left sidebar lists navigation options, with 'Fields & Relationships' selected. The main content area shows the 'Custom Fields' section, which is currently displaying the 'CONTACT' tab. Below the tabs, there are two columns: 'LEAD FIELDS' and 'CONTACT FIELDS'. The 'LEAD FIELDS' column lists various fields, and the 'CONTACT FIELDS' column shows the corresponding mapped fields.

ACCOUNT	CONTACT	OPPORTUNITY
 LEAD FIELDS	 CONTACT FIELDS	
CURRENT GENERATOR(S)	<input type="text" value="None"/>	
GOOGLE ANALYTICS CAMPAIGN	<input type="text" value="Google Analytics Campaign"/>	
GOOGLE ANALYTICS CONTENT	<input type="text" value="Google Analytics Content"/>	
GOOGLE ANALYTICS MEDIUM	<input type="text" value="Google Analytics Medium"/>	
GOOGLE ANALYTICS SOURCE	<input type="text" value="Google Analytics Source"/>	
GOOGLE ANALYTICS TERM	<input type="text" value="Google Analytics Term"/>	

# Lead / Contact Layouts



- There are no marketing info in salesforce contact or lead layouts with useful info for the commercial team
- Because of this lack of information in the salesforce layouts the commercial team doesn't know if the contact is in the Pardot platform or not available to send communications. (one to one, list or engagement programs)

The screenshot shows the 'Engagement History' section in Salesforce. It lists several activities: two 'Website Visit' events and three 'Form View' events. The first 'Website Visit' occurred 15 days 22 hours ago with a duration of 2 minutes 22 seconds, referred from Google, and 6 page views. The 'Form View' events also occurred 15 days 22 hours ago, with durations of 9 seconds, referred from Google, and 2 page views. The activities are for the 'WES - Services Section' and 'WES-GEN-BO-GN-Contact us Madrid' and 'WES-GEN-BO-GN-Contact us Valencia'.

PAGE	TIME
Optimiza tu Estrategia de Marketing, Mejora tu ROI   WAM	01:05pm
Agencia de Marketing Digital y Consultoria Online   WAM	01:05pm

# Salesforce Integration



## Salesforce Pardot Single Sign-On

Salesforce/Pardot single sign-on (SSO) enables users to transfer seamlessly between Salesforce and Pardot without needing to separately log in to accounts.

HOME > ADMINISTRATION  
Users

View: All Users Filter: Tags

<input checked="" type="checkbox"/>	FIRST NAME	LAST NAME	EMAIL / CRM	ROLE
<input checked="" type="checkbox"/>	Astro	Nomical	astronomical@pardot.com astronomical@curious-moose-194204.com	Administrator

With 1 selected: Enable single sign-on with CRM Go

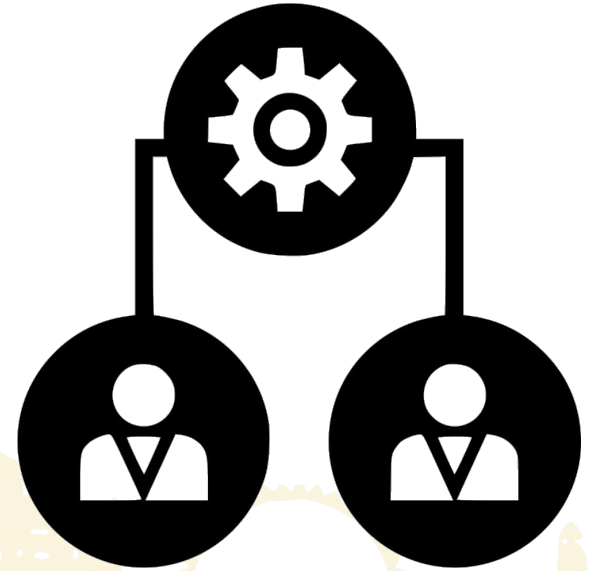


# Salesforce Integration



## User Integration

Any users with assigned prospects in Pardot should have a Salesforce username selected in their user settings. If a user doesn't have this set up, Pardot reassigns their prospects to the **Salesforce connector** user in Pardot.



# Salesforce Integration



## Assigning Pardot Prospects to SFDC (Leads)

- Understand the types of criteria used to assign prospects
- Leverage the different methods of assignment
- Reassign prospects to another sales user



# Salesforce Integration



## Assignment methods

- Automation rules
- Engagement Studio
- Completion actions
- Table actions
- Manual assignment
- Import



# Prospect user assignment



And remember:

Sales Cloud has **always** preference over pardot for prospect assignation



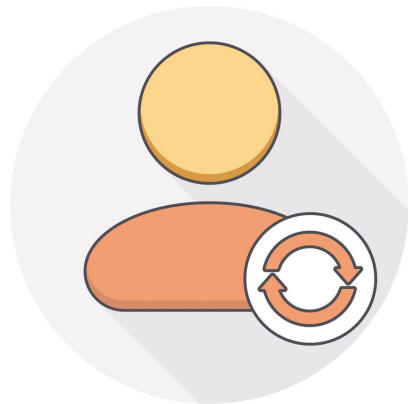


# From Pardot to Sales Cloud



The prospect must be assigned to:

- User
- Queue
- Salesforce active assignment rule
- Group (Marketing)



If a prospect in Pardot has a CRM ID that matches the ID of a record in Salesforce, the two records can sync. These prospects don't need an assigned user in Pardot to sync.



# From Sales Cloud to Pardot



## Two modes of synchronization available

- **Auto**

- All contacts or leads created in sales cloud are created in Pardot Automatically

- **Manual**

- Send to pardot action button

The screenshot shows the 'Customize Connector Preferences' dialog box. It contains several settings, most of which are checked. A red arrow points to the 'Save Connector' button at the bottom left of the dialog.

**Customize Connector Preferences**

- ☒ Automatically create prospects in Pardot if they are created as a Lead or Contact in Salesforce
  - Default Campaign: Created from Salesforce
- ☒ Automatically change email addresses in Pardot to reflect changes in Salesforce
- ☒ Automatically delete or merge prospects if the corresponding records in Salesforce are deleted or merged
  - Requires connector user to have visibility to 'pi\_\_ObjectMasterRecordEmail\_\_c' and 'pi\_\_ObjectMasterRecordEmail\_\_c'
- ☐ Exclude Salesforce "Partner" and "Customer Portal" users from Prospect assignment
- ☒ Automatically match Salesforce users to Pardot users
- ☒ Allow editing of Prospect lists within the CRM

**+ Email Logging**

**+ Email Notifications**

**Save Connector** Cancel

# Prospect limit in Pardot



- Buy more contacts (10k packages)
- Clean your database of Prospects with no activity in your account



⚠ Warning! You have exceeded your Database limit of 10,000 mailable prospects [Learn More](#)

HOME > ADMINISTRATION  
Account

Account Usage and Limits My Profile

Available Features

Feature	Usage	Limit	Utilization
Daily API Requests ⓘ	0 daily api requests	25,000	0%
Concurrent API Requests ⓘ	0 concurrent api requests	5	0%
Mailable Database ⓘ	8,854 mailable prospects	10,000	88.54%
Automation Rules ⓘ	4 automation rules	100	4%

Dynamic List Rules

Match type ☒ Match all ☐ Match any

+

✕

Prospect time

last activity days ago

is greater than

364

+ Add new rule

+ Add new rule group

# Prospect limit in Pardot



## Considerations about recycle bin in Pardot

- Items in the recycle bin don't count toward usage limits.
- Admins can permanently delete prospects in the recycle bin. Pardot no longer tracks prospects when they're permanently deleted.
- A deleted prospect is restored when the Salesforce record it's syncing with is undeleted
- Tags are deleted permanently and don't appear in the recycle bin
- You can't empty the recycle bin





# From Sales Cloud to Pardot

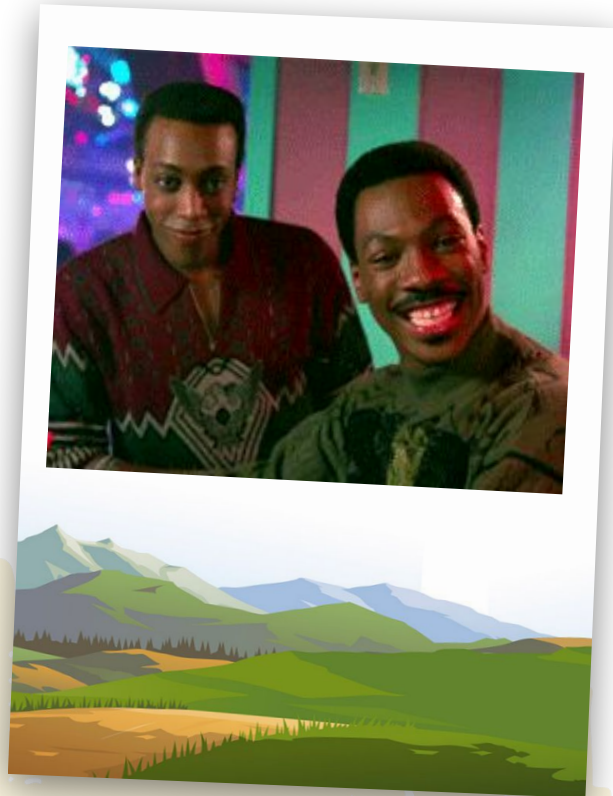


Wait! There is another brand new option

## Selective Syncing

- Use Marketing Data Sharing, a feature available for Pardot Advanced customers using the Pardot Lightning app
- Use a custom connector user and limit the records the user can see

<http://www2.pardot.com/implementing-selective-syncing-with-pardot>

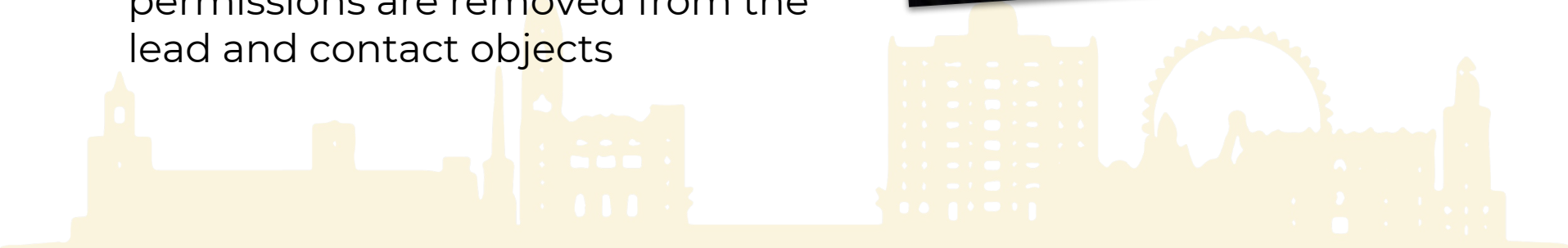


# Salesforce Integration



## Selective syncing requirements (1)

- Dedicated Salesforce user with an active “Salesforce” User License.
- Create a custom Salesforce Profile where “View All/Modify All” permissions are removed from the lead and contact objects



# Salesforce Integration



## Selective syncing requirements (2)

- Ensure that the custom object “ObjectChangeLog” has full permissions
- Lead and/or contact sharing settings are listed as “Private” for the organization-wide defaults



# Salesforce Integration



## Setup & configuration

- Check organization-Wide defaults
  - set to private
- Create sharing rules
  - Create lead/contact rules
  - Select rule type
  - Select value and criteria
  - Add filter logic
  - Select Users
  - Sharing access set to: read/write





# Salesforce Integration



## Considerations for selective syncing

- The prospect must meet the lead sharing rule criteria prior to assignment so the connector user can “see” and sync with the new lead when it is created in Salesforce
- Standard or custom fields used in the sharing rule criteria must be created and mapped in Pardot.



# Salesforce Integration



## Additional notes on this feature

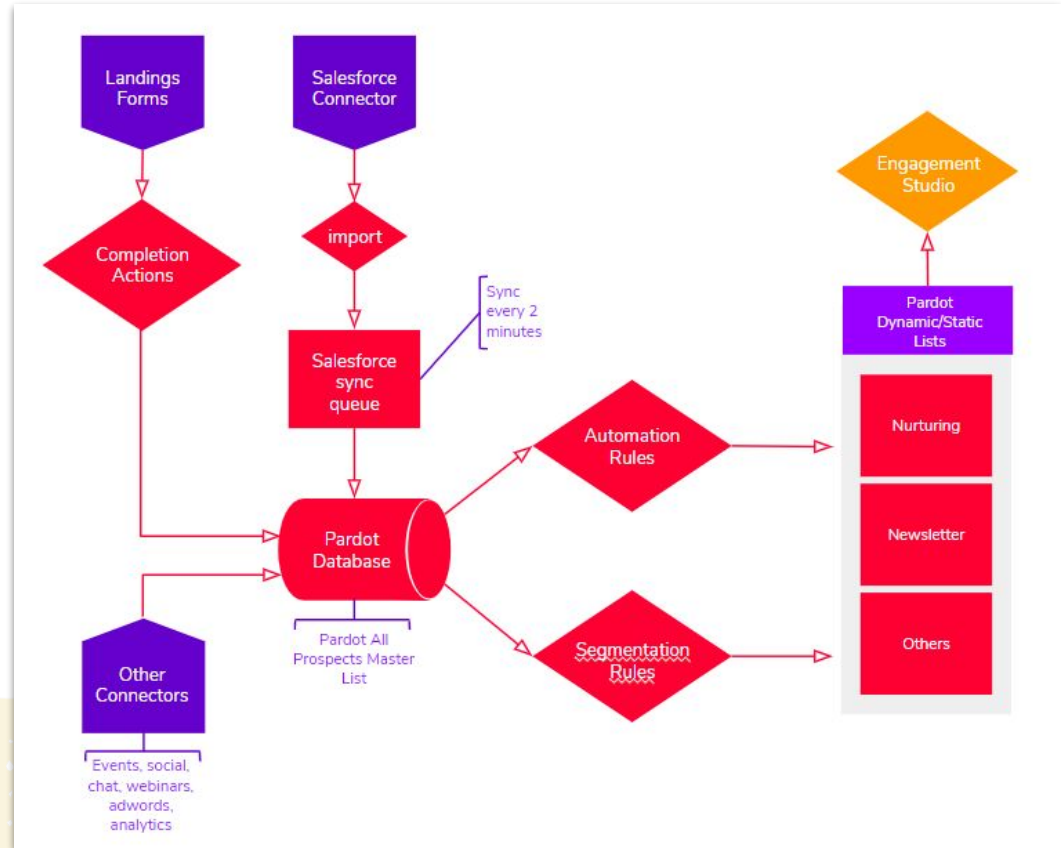
- A new prospect will be automatically created in Pardot when a lead or contact with an email address is created in Salesforce
- Is not retroactive and will only create prospects in Pardot for leads and contacts created after the setting has been enabled
- Leads or contacts who were previously created and did not meet the sharing rule criteria, but later are edited to meet it, will not be automatically created in Pardot



# Sales Cloud & Pardot



## Pardot Technical Architecture Schema



# Prospect integration Sales Cloud Setup



# From Sales Cloud to Pardot



Another problem is that this action is available to all commercials and that they don't have limits or rules that prevent them to send this contact to pardot: any sales user can send a contact to Pardot with no control at all.

Send to Pardot





# Send to Pardot Actions



Insert a visible signal that aware the commercial team if this contact/lead is in pardot or not.

Pardot Status

Pardot synced

Pardot Status

Not in Pardot

Pardot Status

Send to Pardot



Lead

Unknown t.b.d.

Title

CTO

Company

t.b.d.

Email

[unknown@example.com](mailto:unknown@example.com)

Pardot Status



Pardot synced



# Steps to reproduce




1. Upload images of button in documents (classic)

Actions	Name	Owner
	 <a href="#">button_send-to-pardot</a>	Martinez, Paco

2. Create Formula in lead and contact object

FIELD LABEL	FIELD NAME	DATA TYPE
<a href="#">Pardot Status</a>	Pardot_Actions__c	Formula (Text)

3. Add formula in page layout or compact layout

 Lead <b>Unknown t.b.d.</b>			
Title	Company	Email	Pardot Status
CTO	t.b.d.	<a href="#">unknown@example.com</a>	<a href="#">Pardot synced</a>

# Lead / Contact Formula



- Create formula field that require rules to show or hide the action and add to the contact and lead layouts.
- Some of the rules could be:
  - contact has valid email
  - contact is the primary contact of their account
  - contact has an email\_optin status is true

Pardot Status

Pardot synced

Pardot Status

Not in Pardot

Pardot Status

Send to Pardot

If the result of this formula is true the formula shows the action **[send to pardot]**

# Sales Cloud Formula (Lead)



```
IF(!ISBLANK(pi_url_c),  
    IMAGE("{imageurl}", "Pardot synced"),
```

Pardot Status

Pardot synced

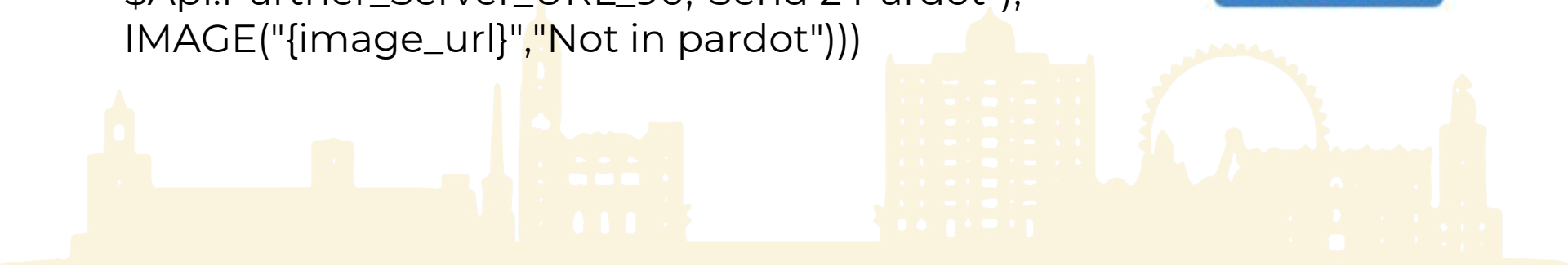
```
IF(AND(ISPICKVAL(Status,  
    "Nurturing"),!ISBLANK(Email)),  
    HYPERLINK("/apex/pi__SendToPardot?LeadEmail=" &  
    Email &"&leadId="& Id &"&serverUrl="&  
    $Api.Partner_Server_URL_90,"Send 2 Pardot"),  
    IMAGE("{image_url}", "Not in pardot")))
```

Pardot Status

Not in Pardot

Pardot Status

Send to Pardot



# Prospect integration Pardot Setup





# Steps to reproduce



1. Disable Automatically create prospects in Pardot if they are created as a Lead or Contact in Salesforce
2. Clean your database of inactive prospects if needed via Segmentation Rule
3. Create Automation Rule to pass prospects from Pardot to Sales Cloud

## Customize Connector Preferences

☒ Automatically create prospects in Pardot if they are created as a Lead or Contact in Salesforce

## Dynamic List Rules

Match type ☒ Match all ☐ Match any



Prospect time

last activity days ago

is greater than

364

☐ NAME

PROSPECTS MATCHED

☐ GE-ACTIONS-Transfer to Salesforce  
/Uncategorized/Automations

700

# Gracias!



@frankey90



<https://www.linkedin.com/in/frankey90>



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# Q&A



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