

salesforce

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# Salesforce-Pardot Connector Implementation Guide

Salesforce, Spring '19



 @salesforcedocs

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# SETTING UP THE SALESFORCE-PARDOT CONNECTOR FOR ACCOUNTS PURCHASED BEFORE FEBRUARY 11, 2019

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

## [Considerations for Using the Salesforce-Pardot Connector](#)

Before setting up your Salesforce-Pardot connector (v1), or unpausing your connector (v2), 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 a Pardot 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 accounts that allow multiple prospects with the same email address.

## [Step 1: Install the Salesforce-Pardot Connector \(Connector v1\)](#)

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

## [Step 2: Configure Salesforce for the Salesforce-Pardot Connector](#)

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

## [Step 3: Configure Pardot](#)

A Pardot admin can map custom fields and users, test the connector, and perform an initial prospect sync.

## Considerations for Using the Salesforce-Pardot Connector

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Before setting up your Salesforce-Pardot connector (v1), or unpausing your connector (v2), review considerations such as syncing fields and prospects, mapping users, and other setup tasks.

### General

- You can have only one Salesforce connector in Pardot.
- If your Salesforce org has clickjack protection enabled, add a clickjack protection-compatible Visualforce page to view Pardot data in Salesforce.
- Pardot can integrate with Salesforce Person Account record types. To enable person account syncing, contact Pardot Support.
- Importing prospects into Pardot causes them to sync with Salesforce. Unassigned prospects sync to Salesforce, but records aren't created when there is no matching email address.
- Pardot checks for changes in Salesforce and Pardot up to every 2 minutes. If you're seeing slower sync times, contact Pardot Support. If you're updating a large volume of records at a time, it can take longer for all changes to sync.

### Connector Version 2

The following applies when using Connector version 2.

- When your Pardot account 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.
- The integration user has access to all records that can sync between Salesforce and Pardot. If you want 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 [Pardot Integration User](#).
- If you link multiple Pardot accounts to one Salesforce account, you can't use the integration user unless you're also using Marketing Data Sharing

## Syncing Fields Between Salesforce and Pardot

- Salesforce updates to prospect fields can trigger Pardot automation rules when rules related to those fields exist.
- Prospects that are assigned to a user in Pardot are created as a lead when the prospect is not syncing with a record in Salesforce.

## Mapping Pardot Users to Salesforce Users

Map Pardot 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

- Pardot syncs on the individual level, not the company level.
- Pardot syncs according to CRM ID. The prospect must have the same CRM ID in Pardot and Salesforce to sync.
- Pardot looks for a matching CRM ID to sync with. If a prospect is not syncing with a Salesforce record, Pardot creates a lead to sync with.
- If a prospect record doesn't have a CRM ID and a record with the email address exists in Salesforce, Pardot syncs to the record. If there are multiple records in Salesforce with the same email address as the prospect, Pardot syncs with the first record it finds.

## Syncing Prospect Activity and Email

- Pardot 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.
- Pardot logs an email in the activity section of the CRM record when sending out a list email or a one-to-one email using the Pardot plug-in.
- Email syncing is controlled in your 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 do not use opportunities in Salesforce, Pardot support can disable opportunity syncing.
- If Salesforce has duplicate records, the activity iframe appears in all the records. However, the Pardot data fields appear only in the record that Pardot is syncing with.

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

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The most important aspect of the Salesforce sync is creating a one-to-one relationship between a Pardot 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 accounts 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 in Pardot with a matching CRM ID. Data from each record syncs according to the sync behavior defined for each field. Prospects are created in Pardot only if the Salesforce connector user has permission to the record in Salesforce.

If a prospect doesn't have a CRM ID and multiple records with the same email address exist in Salesforce, the prospect syncs to the record with the most recent activity.

When a prospect is created in Pardot and it meets your criteria to begin syncing, it creates a record in Salesforce following your connector's settings.

Accounts 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 it detects merged or deleted records in Salesforce, it updates the corresponding Pardot prospects.

## Step 1: Install the Salesforce-Pardot Connector (Connector v1)

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

### [Install the Pardot AppExchange Application](#)

Before setting up your Salesforce connector in Pardot, install the Pardot AppExchange package in your Salesforce org.

### [Assign the Pardot Connector User Permission Set](#)

After the Pardot 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 accounts with Salesforce-Pardot connector v1, or accounts using Marketing Data Sharing.

### [Add the Salesforce-Pardot Connector in Pardot \(Connector v1\)](#)

A Pardot admin can create and configure the connector in Pardot. This process applies only to version 1 of the Salesforce-Pardot connector.

## Install the Pardot AppExchange Application

Before setting up your Salesforce connector in Pardot, install the Pardot AppExchange package in your Salesforce org.

 **Important:** Do not install the package directly from AppExchange. You must install the package as described here.

1. Get the [installation link](#).

### USER PERMISSIONS

To install the Pardot package:


- Download AppExchange Packages (in Salesforce)

This package updates your Salesforce account with a custom application, custom tab, and custom fields under leads and contacts. You might need to modify your view to display the fields.

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 Pardot Connector User Permission Set

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

 **Note:** Apply the Pardot Connector User permission set only to your Pardot connector user. Do not assign the Engage permission set from this page. The Engage permission is assigned from the licensing page.

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

1. From 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 the user.

### USER PERMISSIONS

To assign permission sets:

- Assign Permission Sets (in Salesforce)

To edit object permissions:


- Manage Profiles and Permission Sets

AND

Customize Application (in Salesforce)

## 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 accounts with Salesforce-Pardot connector v1, or accounts using Marketing Data Sharing.


 **Note:** How you apply these permissions is up to you. For more information about permissions, see the [User Permissions documentation](#).

The Pardot Connector user should have these permissions for these standard objects.

Object Name	Object Permissions	Field Permissions
Accounts	View All	All standard and custom fields syncing with Pardot
Campaigns	Create/Edit/Read/View All	All standard and custom fields syncing with Pardot
CampaignMember	Create/Read/Edit	All standard and custom fields syncing with Pardot
Contacts	Create/Edit/Read/View All/Modify All	All standard and custom fields syncing with Pardot



Object Name	Object Permissions	Field Permissions
Leads	Create/Edit/Read/View All/Modify All	All standard and custom fields syncing with Pardot
ObjectChangeLogs	View All/Modify All	All
Opportunity	View All	All standard and custom fields syncing with Pardot
Task	Edit Tasks	All standard and custom fields syncing with Pardot
Users	View All Users	All standard and custom fields syncing with Pardot

 **Note:** Pardot recommends that your connector user also has the View Setup and Configuration permission. This permission makes it possible for support to troubleshoot issues with the connector.

## Add the Salesforce-Pardot Connector in Pardot (Connector v1)

A Pardot admin can create and configure the connector in Pardot. This process applies only to version 1 of the Salesforce-Pardot connector.

- Open the Connectors page.
  - In Pardot, select **Admin** and then **Connectors**.
  - In the Lightning app, click the **Pardot Settings** tab, and then click **Connectors**.
- Click **+ Add Connector**.
- Click **Salesforce**.
- Click **Create Connector**.
- Log in to Salesforce using the connector user's credentials.
- After you're logged in, click **Allow** to give the connector user access to your account.
- Choose your connector settings.
- Click **Finish**.

### USER PERMISSIONS

To add the Salesforce connector in Pardot:

- Pardot Administrator role

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

## Step 2: Configure Salesforce for the Salesforce-Pardot Connector

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

[Map Pardot Custom Lead Fields to Contact Fields](#)

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

### [Show Pardot Data in Salesforce](#)

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

### [Add Custom Pardot Buttons to Salesforce Page Layouts](#)

The Send to Pardot button makes it easy to add Salesforce leads or contacts to Pardot. If a corresponding record exists, the button syncs the records instead of creating a prospect. The Send Pardot Email button lets Salesforce users who are assigned the Pardot permission set to send a Pardot-tracked email from Salesforce.

### [Create the Add to Pardot List Button](#)

Segment prospects from Salesforce with one click by adding a button to your Salesforce campaign page layout. You can add prospects to any Pardot list marked CRM Visible.

### [Add Scoring Category Scores to Page Layouts](#)


If your Pardot account uses scoring categories, you can add the scores to your lead and contact page layouts.

### [Give Users Access to Pardot Data in Salesforce](#)

Apply the Pardot permission set that is included with the AppExchange package to any user who accesses or uses Pardot data in Salesforce.

## Map Pardot Custom Lead Fields to Contact Fields

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

 **Important:** Do not 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 when finished.

### USER PERMISSIONS

To map lead fields:

- Customize Application (in Salesforce)

## Show Pardot Data in Salesforce

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

1. Open your lead or contact page layout for editing.
2. Add the Pardot 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 Pardot custom fields.
  - e. Drag all the Pardot custom fields to the new section.
  - f. (Optional) Drag the Google Analytics fields to the section.
3. Add Pardot activities and list membership to your layout.

### USER PERMISSIONS

To customize page layouts:

- Customize Application (in Salesforce)

- 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 layout when finished.

Repeat these steps for lead and contact page layouts.

## Add Custom Pardot Buttons to Salesforce Page Layouts

The Send to Pardot button makes it easy to add Salesforce leads or contacts to Pardot. If a corresponding record exists, the button syncs the records instead of creating a prospect. The Send Pardot Email button lets Salesforce users who are assigned the Pardot permission set to send a Pardot-tracked email from Salesforce.

 **Note:** Users must be SSO-enabled to use Send to Pardot.

1. Open your lead or contact page layout for editing.
2. In the palette, scroll to the Buttons category (Classic) or to Mobile & Lightning Actions (Lightning Experience).
3. Select the **Send to Pardot** and **Send Pardot Email** buttons, and drag them to the Custom Buttons box (in Classic). To add the buttons to Lightning Experience, drag them to the Salesforce Mobile and Lightning Experience Actions section.
4. Save your page layout when finished.

Repeat these steps for lead and contact page layouts.

### USER PERMISSIONS

To customize page layouts:

- Customize Application (in Salesforce)

## Create the Add to Pardot List Button

Segment prospects from Salesforce with one click by adding a button to your Salesforce campaign page layout. You can add prospects to any Pardot list marked CRM Visible.

1. From the management settings for the Campaign object, go to Buttons, Links, and Actions.
2. Click **New Button or Link**.
3. Enter *Add to Pardot List* for the label.
4. For Display Type, select **Detail Page Button**.
5. From the Behavior dropdown, select **Display in existing window with sidebar**.
6. From the Content Source dropdown, select **URL**.
7. Paste this URL in the Syntax box, and remove all line breaks.

```
https://pi.pardot.com/list/pullCrmCampaign/fid/{!Campaign.Id}/campaignName/{!URLENCODE(Campaign.Name)}/leadCount/{!Campaign.NumberOfLeads}/contactCount/{!Campaign.NumberOfContacts}?sessionId={!$Api.Session_ID}&serverurl={!$Api.Partner_Server_URL_90}
```

8. Save the button.

After you've created the button, add it to your campaign page layout.

### USER PERMISSIONS

To create custom buttons:

- Customize Application (in Salesforce)

## Add Scoring Category Scores to Page Layouts

If your Pardot account uses scoring categories, you can add the scores to your lead and contact page layouts.

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: Pardot Plus and Advanced Editions


### USER PERMISSIONS

To customize page layouts:

- Customize Application (in Salesforce)

## Give Users Access to Pardot Data in Salesforce

Apply the Pardot permission set that is included with the AppExchange package to any user who accesses or uses Pardot data in Salesforce.

 **Note:** Do not assign the Engage permission set from this page. The Engage permission is assigned from the licensing page.

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

### USER PERMISSIONS

To assign permission sets:

- Assign Permission Sets (in Salesforce)

## Step 3: Configure Pardot

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A Pardot admin can map custom fields and users, test the connector, and perform an initial prospect sync.

### [Map Salesforce and Pardot Custom Fields](#)

A Pardot admin can map prospect and account custom fields so that they can sync between Pardot and Salesforce.

### [Connect Pardot and Salesforce Users](#)

Associate your Salesforce users with Pardot users to attribute assignments and actions to the right users. You can manually map users and set up SSO, or you can use Salesforce User Sync to create and manage users from Salesforce.

### [Test the Salesforce-Pardot Connector](#)


After you set up the Salesforce-Pardot connector, you can test to make sure that the connector is syncing as expected.

### [Trigger the Initial Prospect Sync](#)

After you've connected Salesforce and Pardot, import your existing leads and contacts into Pardot. The connector doesn't automatically create prospects in Pardot from existing Salesforce leads and contacts. Upon import, Pardot 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 Pardot Custom Fields

A Pardot admin can map prospect and account custom fields so that they can sync between Pardot and Salesforce.

 **Note:** Before you can map Pardot and Salesforce custom fields, you must create the corresponding custom field in Pardot.

Keep these considerations in mind when mapping fields.

- If a Salesforce field is already mapped to a Pardot field, it doesn't display in the dropdown.
  - Pardot field syncing is not case-sensitive when syncing, so, make Salesforce field API names unique. For example, Pardot doesn't recognize these fields as different: `hair_color` and `HAIR_COLOR`.
  - Pardot fields don't sync with lookup or geolocation Salesforce field types.
  - Don't map Pardot number type fields to Salesforce phone type fields. Phone fields contain non-number characters and don't sync to Pardot correctly. Instead, map Salesforce phone type fields to Pardot text type fields.
1. In Pardot, open the custom field for editing.
  2. From the Salesforce Field Name dropdown, choose the field you want to map.
  3. (Optional) Enable **Keep this field's type and possible values (for dropdowns, radio buttons, checkboxes) in sync with the CRM**. This setting syncs field setting changes from Salesforce to Pardot.
  4. (Optional) Edit sync behavior.

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

 **Note:** Mapping a Pardot custom field with a Salesforce field does not trigger a sync with the CRM.

### USER PERMISSIONS

To map fields:

- Pardot Administrator role

## Connect Pardot and Salesforce Users

Associate your Salesforce users with Pardot users to attribute assignments and actions to the right users. You can manually map users and set up SSO, or you can use Salesforce User Sync to create and manage users from Salesforce.

### [Sync Users Automatically](#)

Salesforce User Sync streamlines managing your users who access both Salesforce and Pardot. Map Salesforce profiles to Pardot user roles to create and keep users in sync. You can manage most synced user fields from Salesforce, eliminating the need to update user records in both systems.

### [Map Users Manually](#)

Associating CRM usernames with Pardot users lets you enable single sign-on (SSO) between Pardot and Salesforce and attribute assignments and actions to the right users.

### USER PERMISSIONS

To map usernames and enable SSO:

- Pardot Administrator role

To enable Salesforce User Sync:

- Pardot Administrator role

## Sync Users Automatically

Salesforce User Sync streamlines managing your users who access both Salesforce and Pardot. Map Salesforce profiles to Pardot user roles to create and keep users in sync. You can manage most synced user fields from Salesforce, eliminating the need to update user records in both systems.

### EDITIONS

Available in: All Pardot Editions

### [Considerations for Enabling Salesforce User Sync](#)

Before enabling Salesforce User Sync, keep these considerations in mind.

#### [Enable Salesforce User Sync](#)

To sync users between Salesforce and Pardot automatically, Pardot admins must enable Salesforce User Sync.

#### [Map Salesforce and Pardot Usernames](#)

Map users with assigned prospects in Pardot to a Salesforce user. If a user isn't mapped, prospects assigned to the user are reassigned to the CRM connector user in Pardot. Users must be mapped to enable SSO.

#### [Update Profile and Role Mapping](#)

Pardot admins can change profile and user role mappings, and update which profiles automatically sync to Pardot.

## Considerations for Enabling Salesforce User Sync

Before enabling Salesforce User Sync, keep these considerations in mind.

### General Considerations for Enabling Salesforce User Sync

- You must have a verified Salesforce-Pardot connector.
- You can't disable Salesforce User Sync after it's enabled.
- If you use multiple Pardot accounts with a Salesforce org, we recommend not enabling Salesforce User Sync. You can't sync subsets of Salesforce users with the same profile to different Pardot accounts.
- When you enable Salesforce User Sync, Pardot users already linked to a CRM user are converted to a synced user. Synced users cannot use Pardot credentials to log in to Pardot. They must use the Log In With Salesforce button or use SSO from the Pardot app in Salesforce. Unsynced users can log in with their Pardot credentials.
- If a deleted Pardot user is mapped to an active Salesforce user that is synced to Pardot, the Pardot user is restored from the recycle bin. If a Salesforce user is deactivated, the corresponding Pardot user is archived in the recycle bin.
- Some Pardot user fields don't sync to Salesforce, such as URL, HTML email signature, text email signature, role, and tags. You can edit these fields in Pardot.
- Changes to user records typically sync within 15 minutes. For accounts with thousands of users, a sync can take up to an hour.

### User Management


- Pardot admins choose which Salesforce profiles to sync to Pardot. When a profile is selected for syncing, every Salesforce user with that profile is synced to Pardot.
- Synced users can't be unsynced, even if the user's profile is unmapped.
- You can sync any Salesforce profile with the Salesforce user license to Pardot.
- You can create a user in Pardot, but if you map them to a Salesforce user, they convert to a synced user.
- You can edit only the URL, HTML email signature, text email signature, role, and tag fields on synced user records in Pardot. Edit all other user fields in Salesforce.
- You can't import users in Pardot after Salesforce User Sync is enabled. Instead, import and sync users from Salesforce.
- Reset synced user passwords in Salesforce. You can reset Pardot-only user passwords from Pardot.
- If a synced Salesforce user is marked inactive, the corresponding Pardot user is archived in the recycle bin. If the Salesforce user is marked as active, the corresponding Pardot user is restored from the recycle bin.
- Pardot email notifications are disabled for new synced users. The user or a Pardot admin can enable email notifications manually in Pardot.

## Integrations

- Use a Pardot-only user for your API integrations.
- Use a Pardot-only user with your Pardot WordPress plug-in.
- Synced users can use Salesforce Engage, Engage for Gmail, and Engage for Outlook. Synced users can't use LeadDeck or Pardot's legacy email plug-ins.

## Enable Salesforce User Sync

To sync users between Salesforce and Pardot automatically, Pardot admins must enable Salesforce User Sync.

 **Important:** Before you enable this feature, understand these prerequisites.

- You must have a verified Salesforce connector, and your connector user must have the required permissions. See [Connecting Pardot and Salesforce](#).
- Audit your Salesforce users to make sure that only those users that you want to sync are assigned the profiles you map.
- Audit Pardot users to make sure that they are linked to the correct CRM usernames. After Salesforce User Sync is enabled, you can't unlink users.

### USER PERMISSIONS

To enable Salesforce User Sync:


- Pardot Administrator role

1. Open the Users page. Click **Admin (Pardot Settings** tab in the Lightning app), and then select **User Management > Users**.
2. Click **Enable Salesforce User Sync**.
3. Follow the prompts.
4. Map Salesforce profiles to Pardot user roles. All Salesforce users with the selected profiles are synced to the assigned Pardot role. The role is applied to new users, and doesn't change the role of existing Pardot users.
5. Confirm the settings. We recommend that you leave that the following settings enabled.
  - **Skip Salesforce users whose email address matches an existing Pardot-only user:** When enabled, this option keeps unlinked Pardot users from being synced to their corresponding Salesforce user. We recommend that you leave this option enabled because it prevents accidentally syncing users that you want to keep as Pardot-only.
  - **Update Pardot user role when a user's Salesforce profile changes:** When enabled, this option automatically updates a Pardot user's role when their Salesforce profile is remapped to a different Pardot role.
  - **Move Pardot user to the recycle bin when they no longer have an assigned profile:** When enabled, this option archives a Pardot user when their Salesforce profile changes to one that's not set up in Salesforce User Sync.
6. When finished mapping profiles, click **Enable Salesforce User Sync**.

Usually, users sync within 15 minutes. For accounts with thousands of users, it can take up to an hour.

## Map Salesforce and Pardot Usernames

Map users with assigned prospects in Pardot to a Salesforce user. If a user isn't mapped, prospects assigned to the user are reassigned to the CRM connector user in Pardot. Users must be mapped to enable SSO.

 **Note:** Before you begin, make sure that you've created your Pardot users.


1. Open the Pardot user record for editing.
2. From the CRM Username dropdown, select the Salesforce user.
3. Save the user.

4. Click the **verify now** link in the CRM Username line of the user record.

Repeat these steps for each user you want to map.

## Update Profile and Role Mapping

Pardot admins can change profile and user role mappings, and update which profiles automatically sync to Pardot.

1. Open the Connectors page.
  - In Pardot, select **Admin** and then **Connectors**.
  - In the Lightning app, click the **Pardot Settings** tab, and then click **Connectors**.
2. Click  next to the Salesforce connector, and then select **Edit**.
3. In the Pardot Lightning app, click the **User Sync** tab. In Pardot, go to Salesforce User Sync.
4. Select the profiles to sync, and select a user role from the Pardot Role dropdown list.



**Note:** If you stop syncing a profile, all users with that profile continue to sync, but new users aren't created in Pardot. To keep a Salesforce user active but remove the corresponding Pardot user, contact Salesforce Customer Support.

5. Confirm the settings. We recommend that you leave that the following settings enabled.
  - **Skip Salesforce users whose email address matches an existing Pardot-only user:** When enabled, this option keeps unlinked Pardot users from being synced to their corresponding Salesforce user. We recommend that you leave this option enabled because it prevents accidentally syncing users that you want to keep as Pardot-only.
  - **Update Pardot user role when a user's Salesforce profile changes:** When enabled, this option automatically updates a Pardot user's role when their Salesforce profile is remapped to a different Pardot role.
  - **Move Pardot user to the recycle bin when they no longer have an assigned profile:** When enabled, this option archives a Pardot user when their Salesforce profile changes to one that's not set up in Salesforce User Sync.
6. When finished, save the connector.

Usually, users sync within 15 minutes. For accounts with thousands of users, it can take up to an hour.

## Map Users Manually

Associating CRM usernames with Pardot users lets you enable single sign-on (SSO) between Pardot and Salesforce and attribute assignments and actions to the right users.

### [Map Salesforce and Pardot Usernames](#)

Map users with assigned prospects in Pardot to a Salesforce user. If a user isn't mapped, prospects assigned to the user are reassigned to the CRM connector user in Pardot. Users must be mapped to enable SSO.

### [Set Up SSO for Salesforce and Pardot](#)

Single sign-on (SSO) lets your users transition between Salesforce and Pardot seamlessly without logging in separately. After you've mapped Pardot and Salesforce users, you can enable SSO for users from User Management.

## Map Salesforce and Pardot Usernames


Map users with assigned prospects in Pardot to a Salesforce user. If a user isn't mapped, prospects assigned to the user are reassigned to the CRM connector user in Pardot. Users must be mapped to enable SSO.

### USER PERMISSIONS

To edit Salesforce User Sync mappings:

- Pardot Administrator role



 **Note:** Before you begin, make sure that you've created your Pardot users.

1. Open the Pardot user record for editing.
2. From the CRM Username dropdown, select the Salesforce user.
3. Save the user.
4. Click the **verify now** link in the CRM Username line of the user record.

Repeat these steps for each user you want to map.

## Set Up SSO for Salesforce and Pardot

Single sign-on (SSO) lets your users transition between Salesforce and Pardot seamlessly without logging in separately. After you've mapped Pardot and Salesforce users, you can enable SSO for users from User Management.

 **Note:** If you enable SSO for users who were created via import or haven't activated their Pardot user seat, the users can't access Pardot directly. They don't have a Pardot password and can access Pardot only through the CRM. Their Pardot user records are marked as SSO-only. Users marked as SSO-only don't have access to email plug-ins or LeadDeck.

1. Open the Users page. Click **Admin (Pardot Settings** tab in the Lightning app), and then select **User Management > Users**.
2. Select the users for whom you want to enable SSO.
3. From the dropdown under the table, select **Enable single sign-on with CRM**.

Users can also enable SSO for themselves from their user settings.

## Test the Salesforce-Pardot Connector

After you set up the Salesforce-Pardot connector, you can test to make sure that the connector is syncing as expected.

### Test Accounts That Don't Allow Multiple Prospects with the Same Email Address


1. New Pardot prospect with an existing salesforce record—Create a prospect record in Pardot that exists in your CRM. To check whether the record syncs, click **Sync with CRM**, or wait 10–15 minutes to see if the connector initiates the sync.
2. New Pardot prospect with a new Salesforce record—Create a prospect record in Pardot with an email address of a Salesforce record that doesn't exist. Add a record in Salesforce with the same email address. To check whether the record syncs, click **Sync with CRM**, or wait 10–15 minutes to see if the connector initiates the sync.
3. Assign prospects in Pardot—Create a prospect in Pardot with an email address that doesn't exist in Salesforce, and assign the prospect to a user. Check to see whether a record is created in Salesforce.
4. Automatic prospect creation from new CRM record—If your connector is set up to create prospects in Pardot when a record is added in Salesforce, create a Salesforce record with an email address that doesn't exist in Pardot. Check whether Pardot has the new record.

### Test in Accounts That Allow Multiple Prospects with the Same Email Address

1. Assign prospects in Pardot—Create a prospect in Pardot, and assign the prospect to a user. Check to see whether the record is created in Salesforce.
2. Create a record in Salesforce—Create a Salesforce record. Wait for the record to sync, or manually sync by clicking **Send to Pardot**. Check to see whether the record is created in Pardot.

## Trigger the Initial Prospect Sync

After you've connected Salesforce and Pardot, import your existing leads and contacts into Pardot. The connector doesn't automatically create prospects in Pardot from existing Salesforce leads and contacts. Upon import, Pardot 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 account allows multiple prospects with the same email address, you must import by CRM ID to match leads and contacts with prospects. If you do not import by CRM ID, prospects imported by email address create duplicate leads or contacts in Salesforce.