



# Rative Pardot Implementation

## Connect Salesforce and Pardot

- Apply Pardot and Sales Cloud permission sets
- Confirm B2BMA Integration User has verified data connection
- If connection cannot be made reinstall b2bma\_canvas package
- Provide field level access to B2bma Integration User profile
- Map relevant custom lead fields to Pardot
- Map relevant custom contact fields to Pardot
- Map relevant custom account fields to Pardot
- Map relevant custom opportunity fields to Pardot
- Create Salesforce to Pardot campaign in Salesforce
- Configure prospect syncing behavior
- Map Pardot lead fields to contacts

## Sync Users Between Salesforce and Pardot

- Map Salesforce profiles to Pardot profiles
- Configure syncing behavior

## Enable Pardot Lightning App

- Add profiles to B2BMA Canvas app
- Hide classic Pardot app
- Add Pardot and Sales Cloud User or CRM User permission sets to designated users

## Make Pardot Data and Actions Available on Salesforce Records

### Enable Connected Campaigns Functionality

- Setup Salesforce custom domain
- Add Pardot fields and buttons to contact layouts
- Add Pardot fields and buttons to lead layouts
- Add visual force components to contact page layouts
- Add visual force components to lead page layouts
- Add engagement history to contact lightning pages
- Add engagement history to lead lightning pages

- Create Website Tracking Salesforce campaign and map to Pardot
- Configure connected campaigns
- Hide unconnected campaigns
- Turn on Salesforce managed campaigns

### Domain and Website Setup

- Install javascript tracking code on website through a Pardot plugin, a design template, or tag manager
- Add sending and tracking domains to Pardot settings
- Add TXT records to DNS settings
- Point tracker domain CNAME to go.pardot.com
- Validate DNS changes

### Initiate Prospect Sync

- Test prospect syncing behavior
- Unpause Salesforce connector sync
- Export relevant Salesforce leads and contacts
- Import leads and contacts into Pardot as prospects