

Pardot List Control For Salesforce Setup Guide

Setup Guide



Create. Innovate. Educate.

Introduction

* Salesforce Labs provides free, open source solutions to the AppExchange.

Easily manage your prospects *without* leaving your Salesforce record.

While working on your **Lead** or **Contact**, chatting on the phone to them or updating their record, quickly create a Pardot list and add the person to that list *without* leaving the record.

Know the Pardot list name? Use the **search** function to find the list and add the record, there and then!

- No need to leave Salesforce - create a list while you're working on a Lead/Contact
- Easily and quickly search and add the record to your list
- No need to memorise List Ids if more than one list has the same name

System requirements:

Available for use in Enterprise, Unlimited, Performance Editions of Salesforce.

Pardot List Control for Salesforce is a free solution designed to optimise the user experience with the following Salesforce Products, and thus requires

- Pardot

Installation Guide

Login with your trailhead email and navigate to our listing on Appexchange

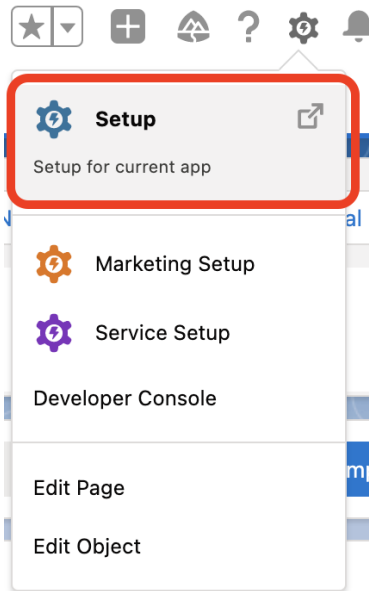
Select “Get it Now” from the listing and select the org you want to install it in from the drop down

1. Agree to the terms and conditions
2. **Select “Get it Now” from the listing and select the org you want to install it in from the drop down**
3. Agree to the terms and conditions
4. Once you have redirected to the Salesforce login page, input the credentials for the Salesforce org you wish to install the solution in
5. Select the profiles you wish to access the solutions (Admins Only, Everyone, or Specific Profile>)

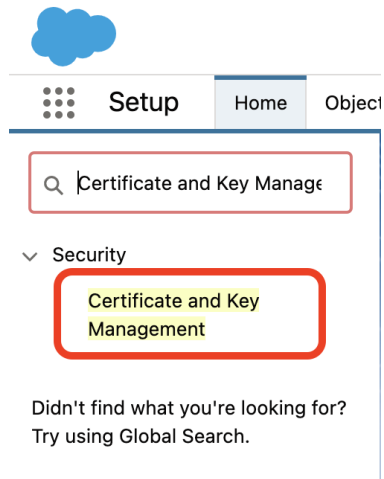
Set Up Guide

Once you have successfully installed Pardot List Control for Salesforce please ensure you follow the steps below to ensure successful implementation:

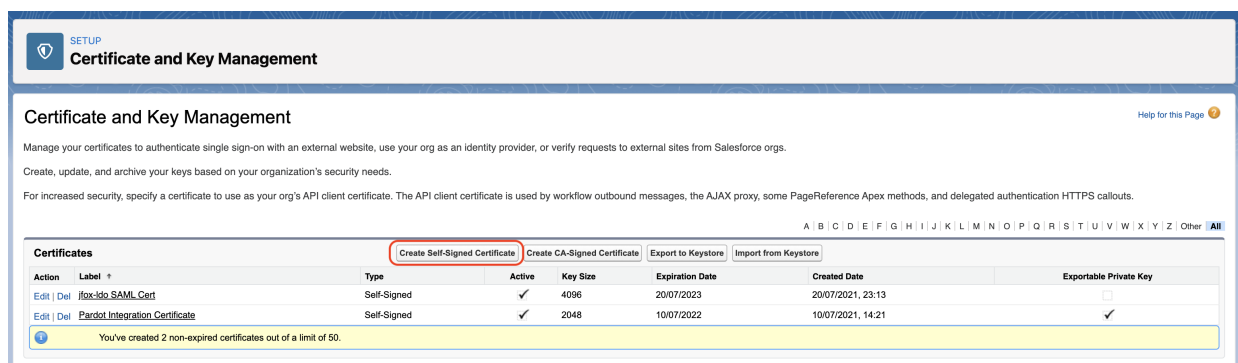
- Navigate to ‘Setup’



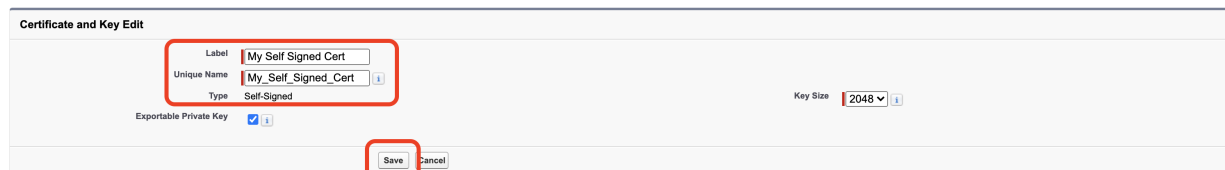
- Certificate and Key Management



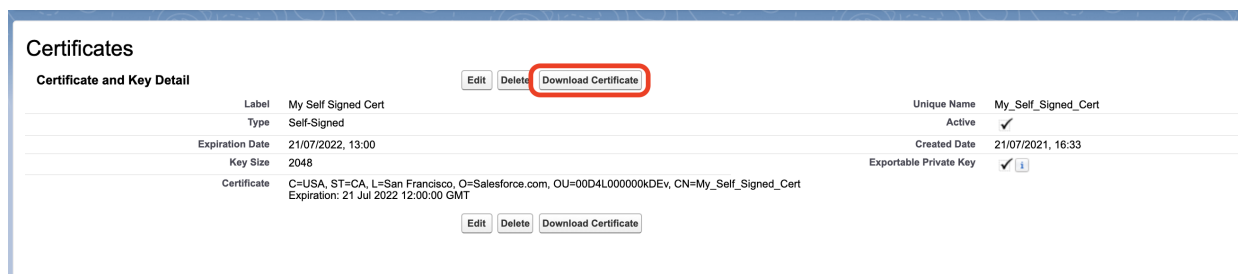
- Create Self-Signed Certificate



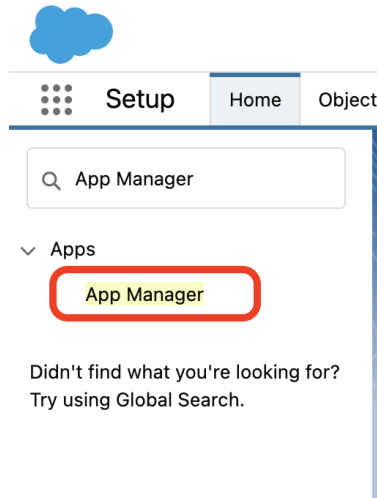
- Give the certificate a memorable name then click save



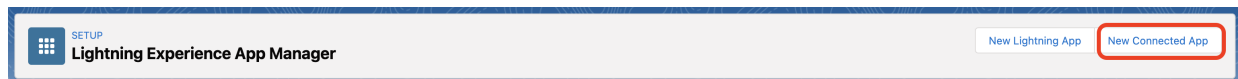
- Click download certificate and save it to a safe location on your local machine



- Now, navigate to 'App Manager'



- Click New Connected App



- Give the connected app a memorable name
- Use a contactable email address for Contact Email
- Check Enable OAuth Settings
- Ensure the Callback URL is
 - For Salesforce Production - '<https://login.salesforce.com/services/oauth2/callback>'
 - For Salesforce Sandbox - '<http://test.salesforce.com/services/oauth2/callback>'
- Check Enable OAuth Settings
- Check Use Digital Signature
- Upload the certificate you downloaded earlier to your local machine
- Provide at least pardot_api, refresh_token and offline_access to the scopes
- Check Require Secret for Web Server Flow
- Check Require Secret for Refresh Token Flow

Connected App Name
Pardot Hub

Basic Information

Connected App Name	Pardot Hub
API Name	Pardot_Hub
Contact Email	Jonathan.fox@salesforce.com
Contact Phone	
Logo Image URL	
	Upload logo image or Choose one of our sample logos
Icon URL	
	Choose one of our sample logos
Info URL	
Description	

API (Enable OAuth Settings)

Enable OAuth Settings	☒
Enable for Device Flow	☐
Callback URL	https://login.salesforce.com/services/oauth2/callback
Use digital signatures	☒
	C=USA, ST=CA, L=San Francisco, O=Salesforce.com, OU=00D4L000000kDev, CN=Pardot_Integration_Certificate 10 Jul 2022 12:00:00 GMT
	Choose file No file chosen

Selected OAuth Scopes	Available OAuth Scopes Access and manage your Chatter data (chatter_api) Access and manage your Eclair data (eclair_api) Access and manage your Salesforce CDP Ingestion API data (cdp_ingest_api) Access and manage your Wave data (wave_api) Access and manage your data (api) Access custom permissions (custom_permissions) Access your basic information (id, profile, email, address, phone) Allow access to Lightning applications (lightning) Allow access to content resources (content) Allow access to your unique identifier (openid) Add Remove	Selected OAuth Scopes
Require Secret for Web Server Flow	☒	Access Pardot services (pardot_api) Perform requests on your behalf at any time (refresh_token, offline_access)
Require Secret for Refresh Token Flow	☒	
Introspect All Tokens	☐	
Configure ID Tokens	☐	
Enable Asset Tokens	☐	
Enable Single Logout	☐	

- Copy your Consumer Key

Connected App Name
Pardot Hub

[« Back to List: Custom Apps](#)

[Edit](#) [Delete](#) [Manage](#)



Version	1.0
API Name	Pardot_Hub
Created Date	10/07/2021, 13:58
By:	Jonathan Fox
Contact Email	Jonathan.fox@salesforce.com
Contact Phone	
Last Modified Date	10/07/2021, 14:23
By:	Jonathan Fox
Description	
Info URL	

▼ API (Enable OAuth Settings)

Consumer Key **3MVG9I9urWjeUW07X8XuADoesRPepdBgUPDnS3m1v0uSj85h8No2kv1iF0ohxsqJ_KT5Ef18tM1eZ98Tj3lsl** [Copy](#)

- Still on your Connected app page, ensure you click 'Manage'
- Edit Policies
- Change permitted users from 'All users may self-authorise' to 'Admin approved users are pre-authorised'

Connected App
Pardot List Control

[Help for this Page](#)

Connected App Edit



Version 1
Description

Basic Information

Start URL: [Help](#) [Info](#) Mobile Start URL: [Help](#) [Info](#)

OAuth Policies

Permitted Users: **All users may self-authorize**
☒ Admin approved users are pre-authorized

IP Relaxation: **Enforce IP restrictions**

Refresh Token Policy: ☒ Refresh token is valid until revoked
☐ Immediately expire refresh token
☐ Expire refresh token if not used for Day(s)
☐ Expire refresh token after Day(s)

Session Policies

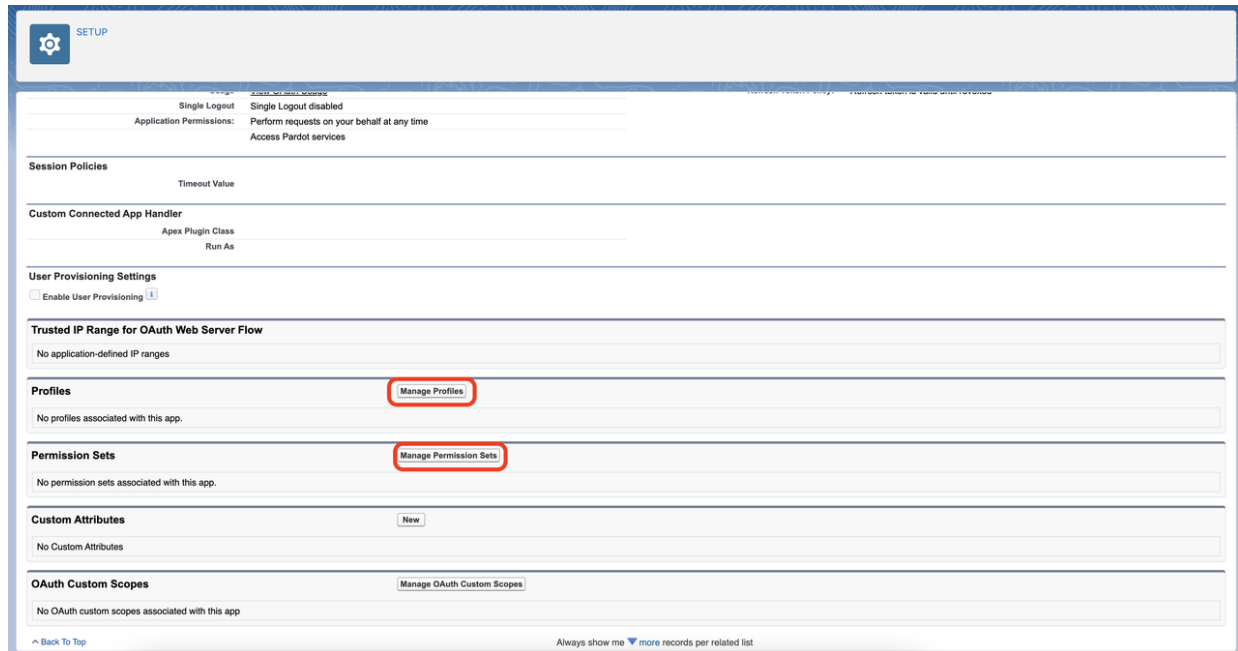
Timeout Value: **--None--** ☐ High assurance session required

Custom Connected App Handler

Apex Plugin Class: [Help](#) [Info](#)
 Run As: [Help](#) [Info](#)

User Provisioning Settings

- Click save
- Navigate down the page and click 'Manage Profiles' or 'Manage Permission Sets' - Here you can select which users can use this component by authorising their profile or permission set. If you want a unique set of users, create an 'empty' permission set, assign it to your users and then add it to the list here



SETUP

Single Logout: Single Logout disabled
Application Permissions: Perform requests on your behalf at any time
Access Pardot services

Session Policies
Timeout Value

Custom Connected App Handler
Apex Plugin Class
Run As

User Provisioning Settings
☐ Enable User Provisioning

Trusted IP Range for OAuth Web Server Flow
No application-defined IP ranges

Profiles
No profiles associated with this app. [Manage Profiles](#)

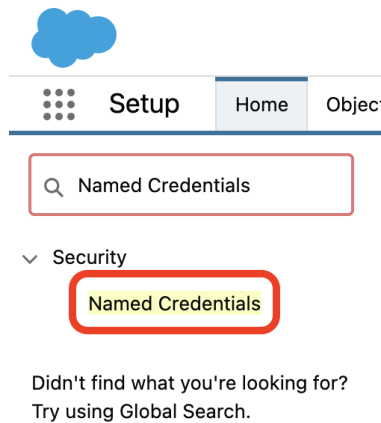
Permission Sets
No permission sets associated with this app. [Manage Permission Sets](#)

Custom Attributes
No Custom Attributes [New](#)

OAuth Custom Scopes
No OAuth custom scopes associated with this app. [Manage OAuth Custom Scopes](#)

[Back To Top](#) Always show me [more records per related list](#)

- Next, navigate to Named Credentials



- Create a new named credential
- Give the Named Credential a memorable name
- Take note of the 'Name' field for the next step
- Ensure URL is
 - For Production - '<https://pi.pardot.com/api>'
 - For Sandbox - '<https://pi.demo.pardot.com/api>'
- Leave 'Certificate' blank
- Identity type should be 'Named Principal'
- Authentication Protocol is 'JWT Token Exchange'

- Ensure the Token Endpoint URL is
 - For Salesforce Production - '<https://login.salesforce.com/services/oauth2/token>'
 - For Salesforce Sandbox - '<https://test.salesforce.com/services/oauth2/token>'
- In the Issuer field, paste your copied Consumer key from the Connected App Steps
- Named Principle Subject can be any user's username but it may be best to use an integration user
- For audiences, use
 - For Salesforce Production - '<https://login.salesforce.com/>'
 - For Salesforce Sandbox - '<https://test.salesforce.com/>'
- For JWT Signing Certificate, choose the certificate you created
- Check Generate Authorisation Header

Named Credential Edit: APEX Pardot Credential

Specify the callout endpoint's URL and the authentication settings that are required for Salesforce to make callouts to the remote system.

Save Cancel

Label: APEX Pardot Credential

Name: APEX_Pardot_Cred

URL: <https://api.demo.pardot.com/api>

Authentication

Certificate: 

Identity Type: Named Principal

Authentication Protocol: JWT Token Exchange

Token Endpoint Url: <https://login.salesforce.com/services/oauth2/token>

Scope:

Issuer: 3MVG9I9urWjeUW07?

Named Principal Subject: jonathan.fox@salesfor

Audiences: <https://login.salesforce.com>

Token Valid for: 30 Seconds

JWT Signing Certificate: Pardot Integration Certificate

Callout Options

Generate Authorization Header: ☒

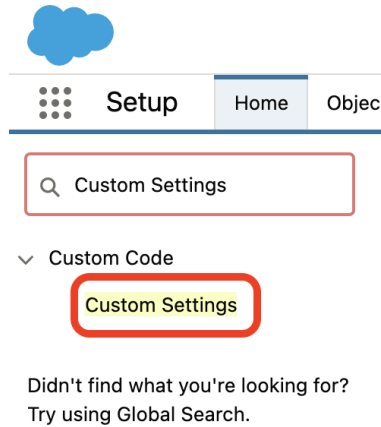
Allow Merge Fields in HTTP Header: ☐

Allow Merge Fields in HTTP Body: ☐

Outbound Network Connection: 

Save Cancel

- Now, navigate to Custom Settings



- Select 'Manage' next to the 'Pardot List Control' custom setting

Custom Settings [Help for this Page](#)

Use custom settings to create and manage custom data at the organization, profile, and user levels. Custom settings data is stored in the application cache. This means you can access it efficiently, without the cost of repeated queries. Custom settings data can be used by formula fields, Visualforce, Apex, and the Web Services API.

View: [All](#) [Create New View](#) [Get Usage](#)

Action	Label	Visibility	Settings Type	Namespace Prefix	Description	Record Size	Number of Records	Total Size
Manage	Demo Settings	Public	List	pi		355	0	0
Edit Del Manage	Pardot List Control	Public	Hierarchy	pi_list_control		610	2	1220
Manage	Partner Settings	Public	List	pi		200	0	0
Manage	Public Setting for AsyncRequests	Public	List	pi	Settings for AsyncRequest Scheduling	385	1	385
Manage	Public Setting for LogObjectTrigger	Public	List	pi	Settings for LogObjectTriggerHandler for leads and contacts. Defines whether it should use async processing or not.	120	1	120

[Deleted Objects \(1\)](#)

- Click edit at the top of the page
- Populate the 'Named Credentials - Name' from the Named credentials you created earlier
- Populate the Business Unit Id with your Pardot Business Unit Id you wish to connect by default
- If you wish to set separate Named Credentials and/or Pardot Business Units per User and/or Profile:
 - Click New
 - Choose the Profile or User
 - Populate the 'Named Credentials - Name' from the Named credentials you created
 - Populate the Business Unit Id with your Pardot Business Unit Id you wish to connect

Custom Setting
Pardot List Control [Help for this Page](#)

If the custom setting is a list, click **New** to add a new set of data. For example, if your application had a setting for country codes, each set might include the country's name and dialing code.

If the custom setting is a hierarchy, you can add data for the user, profile, or organization level. For example, you may want different values to display depending on whether a specific user is running the app, a specific profile, or just a general user.

[Edit](#) [Delete](#)

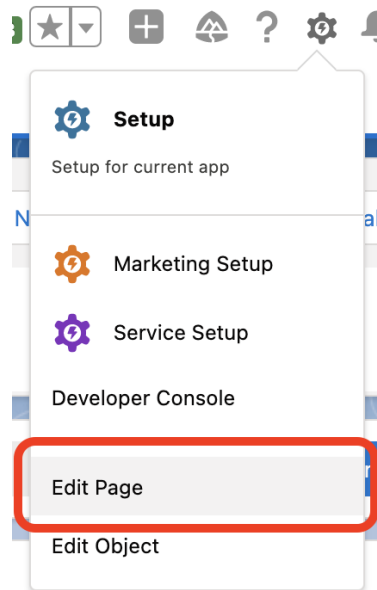
▼ **Default Organization Level Value**

Location	Named Credential - Name	Business Unit Id	Setup Owner
JFox Pardot Connection	APEX_Pardot_Credential	0Uv4L000000004DSAQ	System Administrator

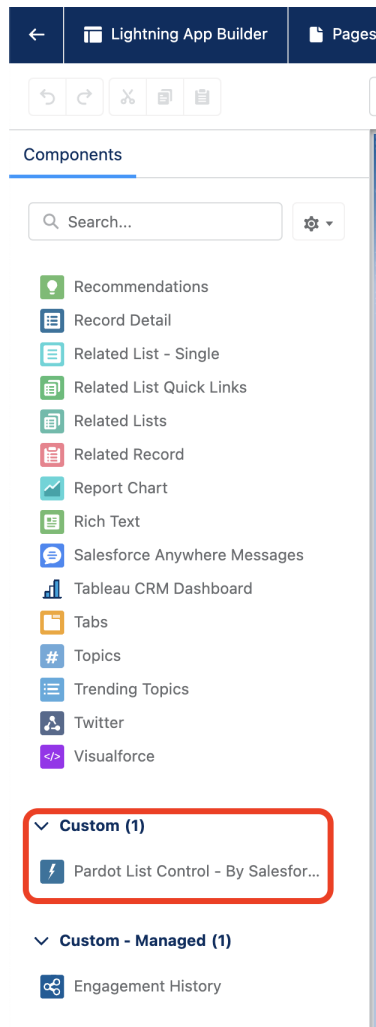
View: [All View Detail](#) [Edit](#) [Create New View](#)

Action	Name	Location	Business Unit Id	Named Credential - Name	Setup Owner
View Edit Del	Pardot List Control (Profile)	Profile	0Uv4L000000004DSAQ	APEX_Pardot_Credential	System Administrator

- Now, head to either Lead or Contact from your Application Launcher and click Edit Page



- Locate the Lightning Web Component from the left hand pane by scrolling down to the Custom - Managed Section and finding 'Pardot List Control - By Salesforce'



- Drag and drop the component into your desired location on the page

The screenshot displays a CRM interface for a lead named Ms Brenda McClure. At the top, the lead's name is shown with a star icon and the title 'Lead'. Below this, contact information is listed: Title (CFO), Company (Cadinal Inc.), Phone (2) (847) 262-5000, and Email (brenda@cardinal.net). Action buttons include '+ Follow', 'New Case', 'New Note', and 'Submit for Approval'. A progress bar indicates the lead's status: 'Working - Contacted' (active), 'Closed - Not Converted', and 'Converted'. Below the progress bar, there are tabs for 'Activity', 'Details', 'Chatter', and 'News'. The 'Activity' tab is selected, showing a 'New Task' section with options to 'Log a Call', 'New Event', or 'Email'. A 'Create new...' button is also present. Below this, there are filters for 'All time', 'All activities', and 'All types', along with 'Refresh', 'Expand All', and 'View All' links. The main activity list shows 'Upcoming & Overdue' with a message: 'No next steps. To get things moving, add a task or set up a meeting.' and 'No past activity. Past meetings and tasks marked as done show up here.' On the right side, a 'Pardot List Control' sidebar is visible, containing two buttons: 'Create New Pardot List' and 'Add This Record to Existing Pardot List'.

- Now click save and activate

Resources

1. [Video walkthrough - How to use this component](#)