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

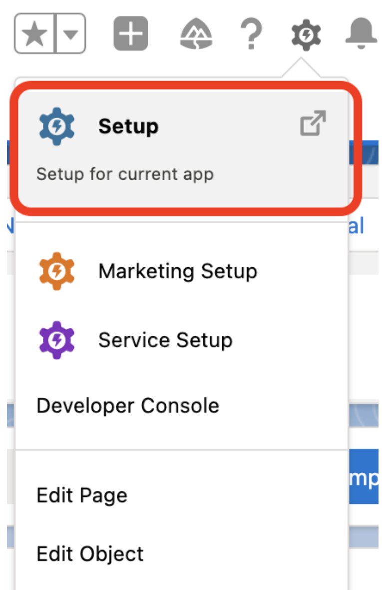
Select “Get it Now” from the listing and select the org you want to install it in from the drop down

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>)

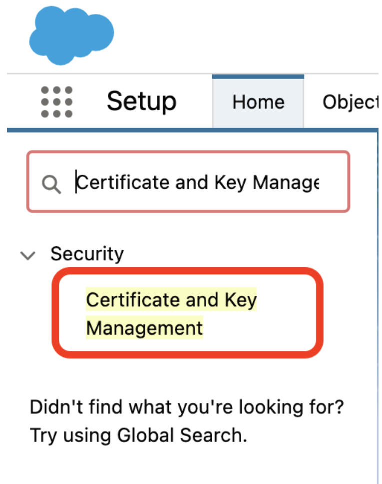
Set Up Guide

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

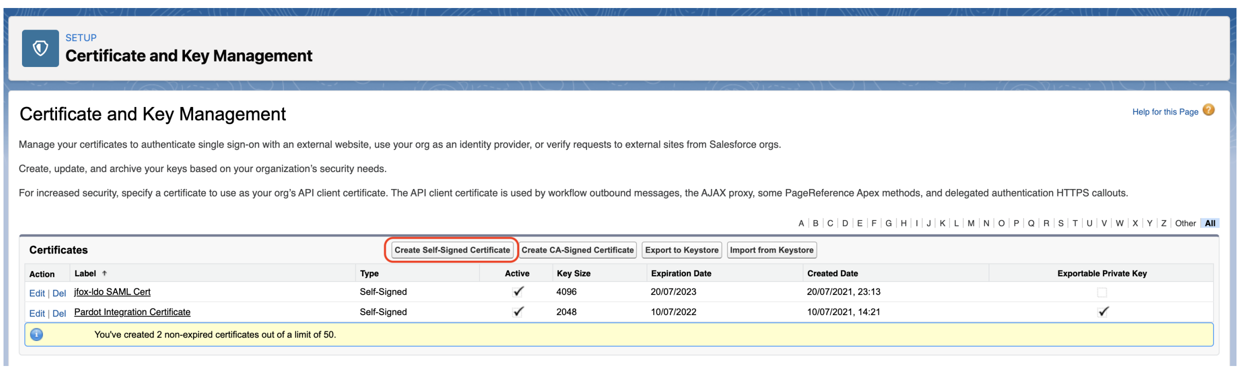
- Navigate to ‘Setup’



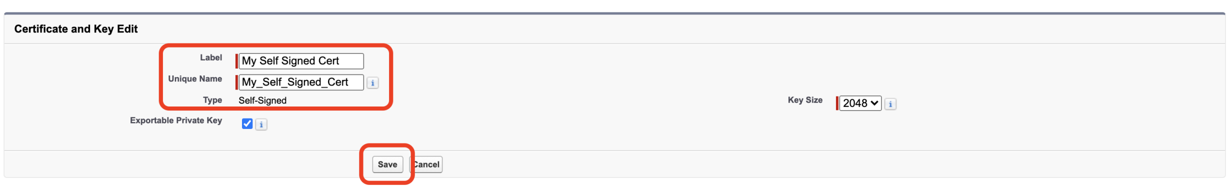
- Certificate and Key Management



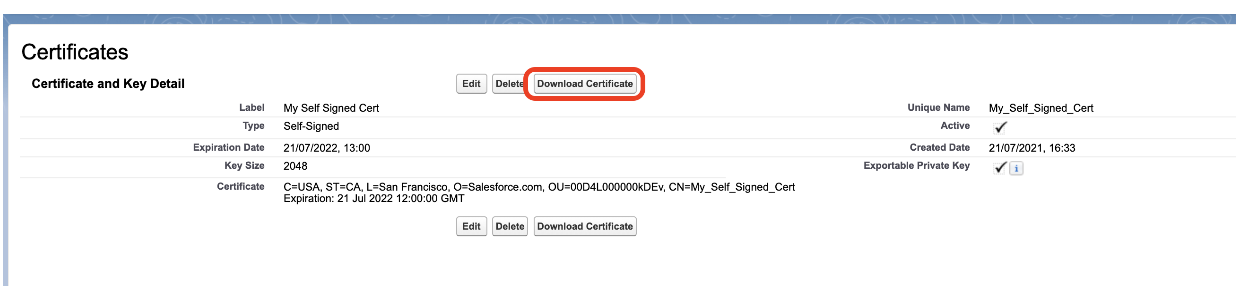
- Create Self-Signed Certificate



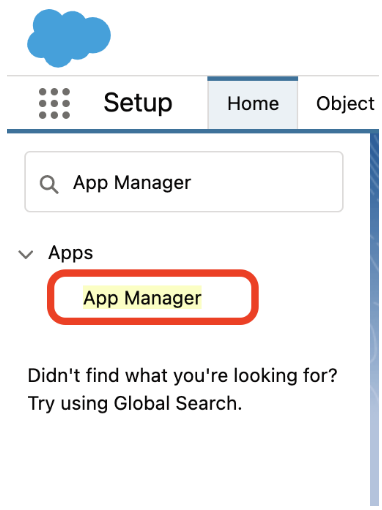
- Give the certificate a memorable name then click save



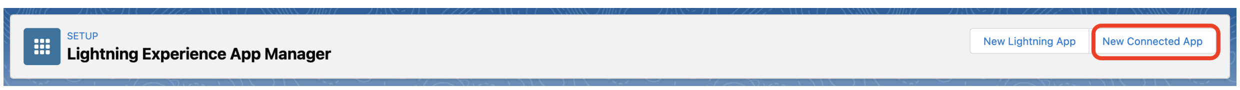
- Click download certificate and save it to a safe location on your local machine



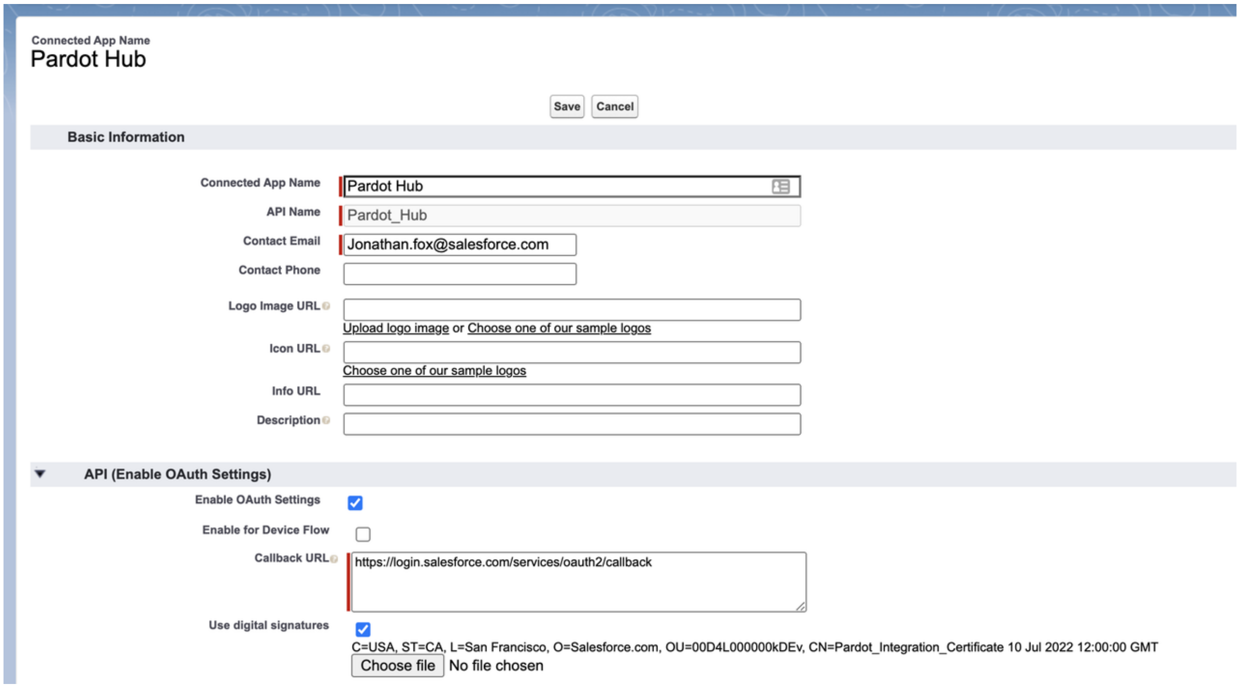
- Now, navigate to 'App Manager'

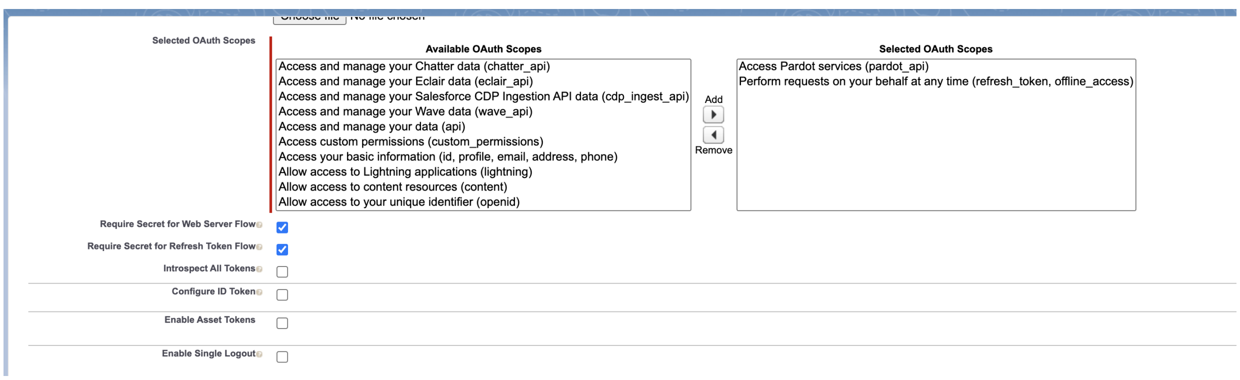


- Click New Connected App

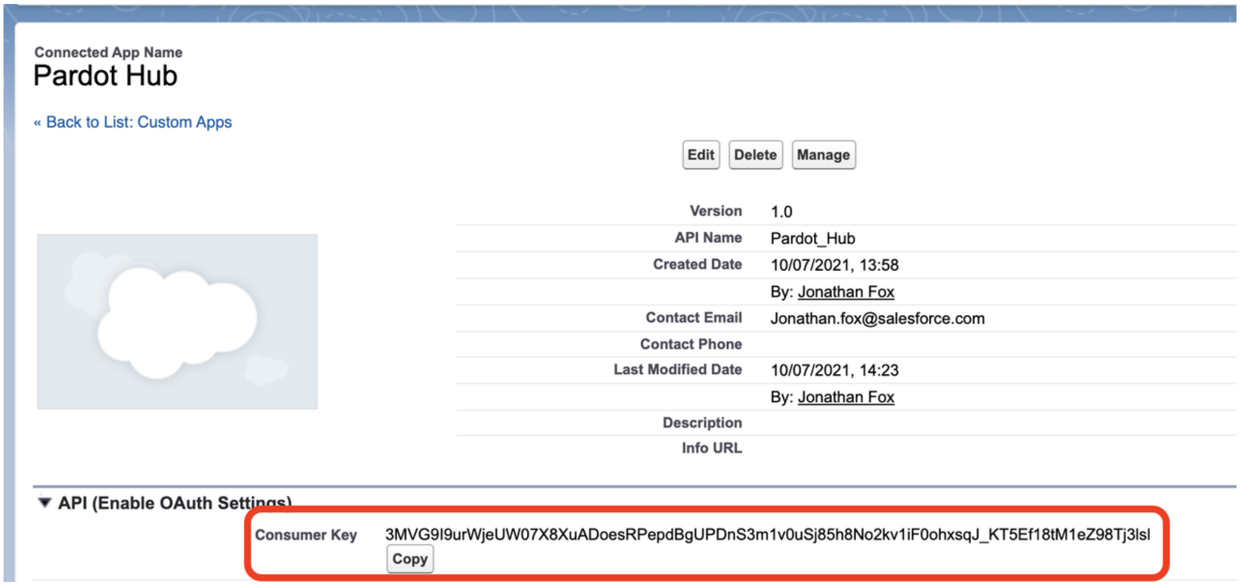


- Give the connected app a memorable name
- Use a contactable email address for Contact Email
- Check Enable OAuth Settings
- Ensure the Callback URL is
  - For Salesforce Production - 'https://login.salesforce.com/services/oauth2/callback'
  - For Salesforce Sandbox - 'http://test.salesforce.com/services/oauth2/callback'
- 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

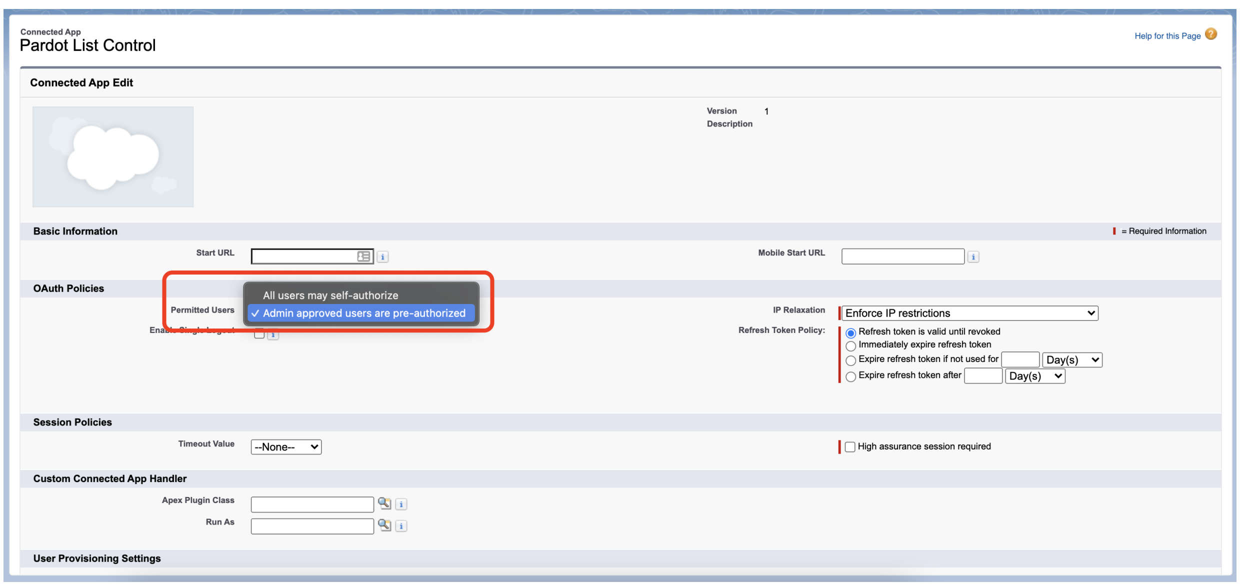




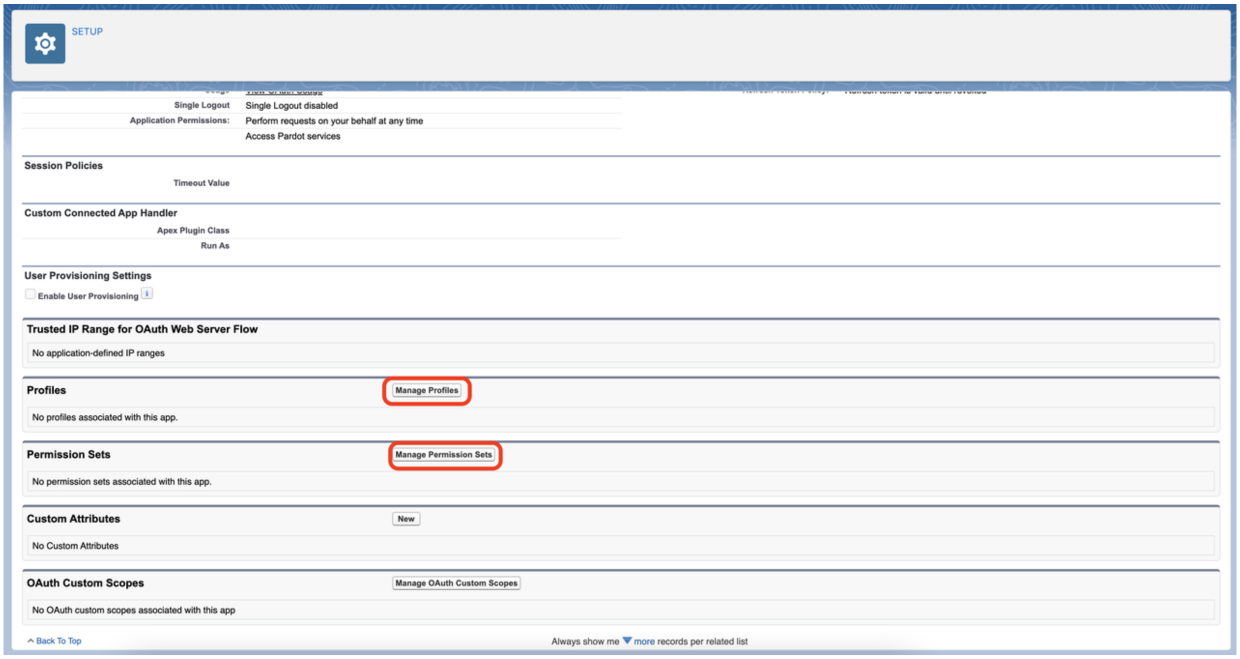
- Copy your Consumer Key



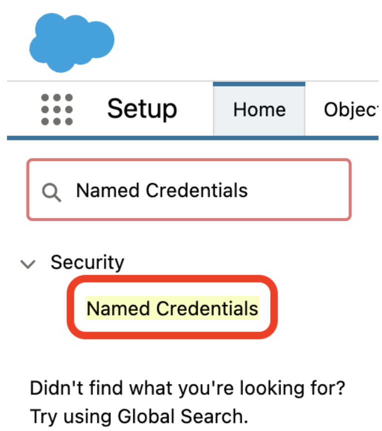
- Still on your Connected app page, ensure you click ‘Manage’
- Edit Policies
- Change permitted users from ‘All users may self-authorise’ to ‘Admin approved users are pre-authorised’



- 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

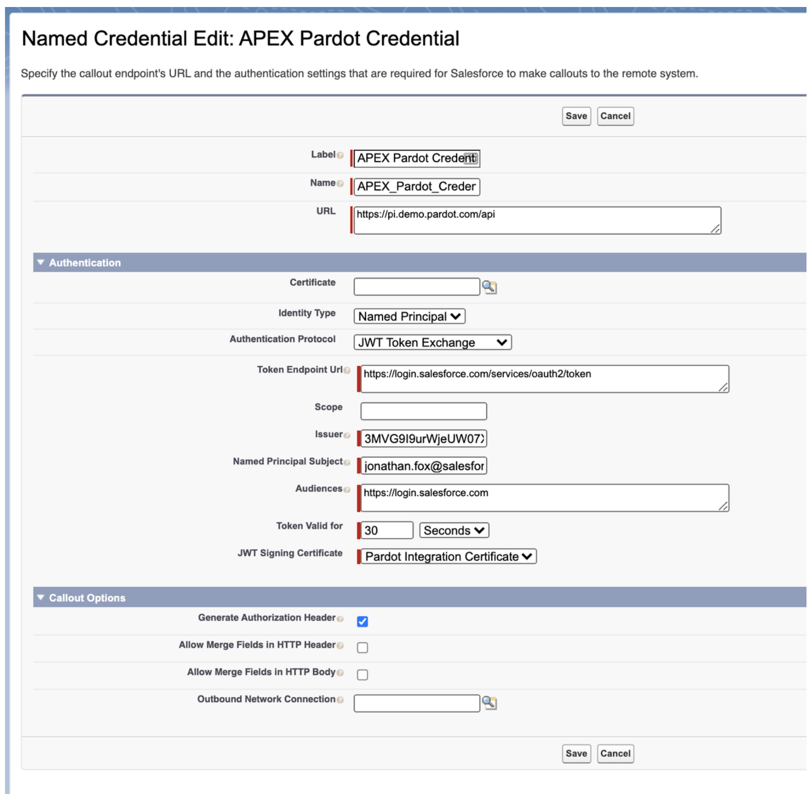


- Next, navigate to Named Credentials

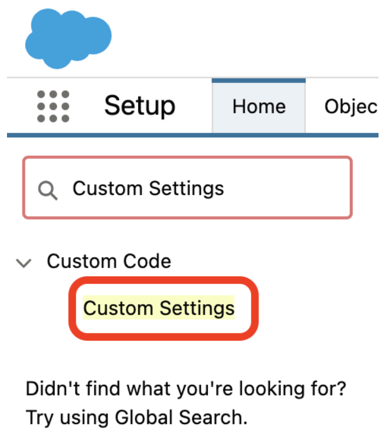


- Create a new named credential
- Give the Named Credential a memorable name
- Take note of the ‘Name’ field for the next step
- Ensure URL is
    - For Production - ‘https://pi.pardot.com/api’
    - For Sandbox - ‘https://pi.demo.pardot.com/api’
- Leave ‘Certificate’ blank
- Identity type should be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

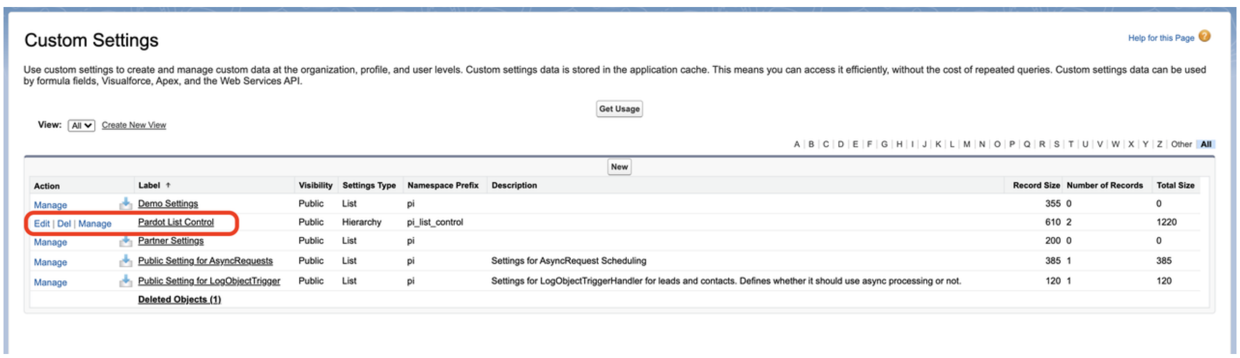
- Ensure the Token Endpoint URL is
  - For Salesforce Production - ‘https://login.salesforce.com/services/oauth2/token’
  - For Salesforce Sandbox - ‘https://test.salesforce.com/services/oauth2/token’
- In the Issuer field, paste your copied Consumer key from the Connected App Steps
- Named Principle 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



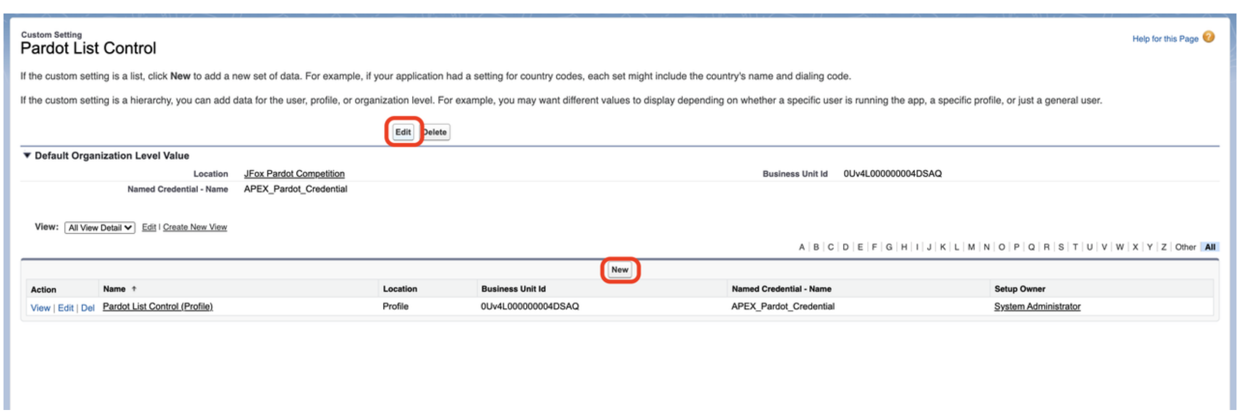
- Now, navigate to Custom Settings



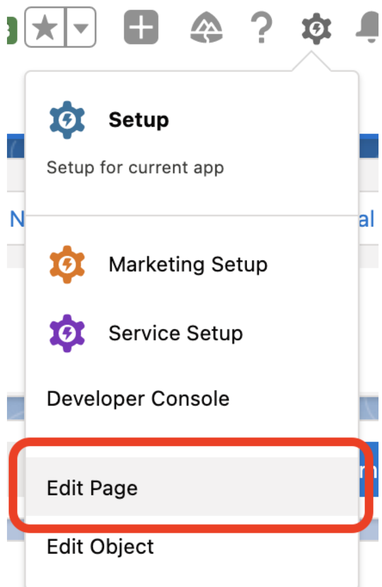
- Select ‘Manage’ next to the ‘Pardot List Control’ custom setting



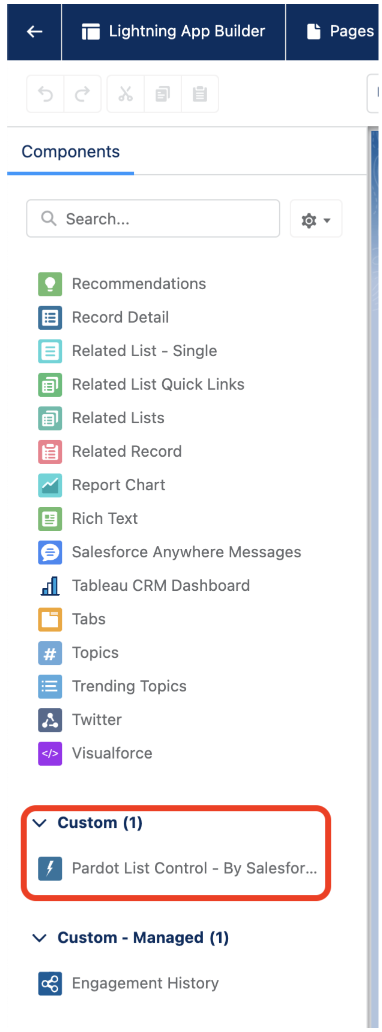
- Click edit at the top of the page
- Populate the ‘Named Credentials - Name’ from the Named credentials you created earlier
- Populate the Business Unit Id with your Pardot Business Unit Id you wish to connect by default
- If you wish to set seperate Named Credentials and/or Pardot Business Units per 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



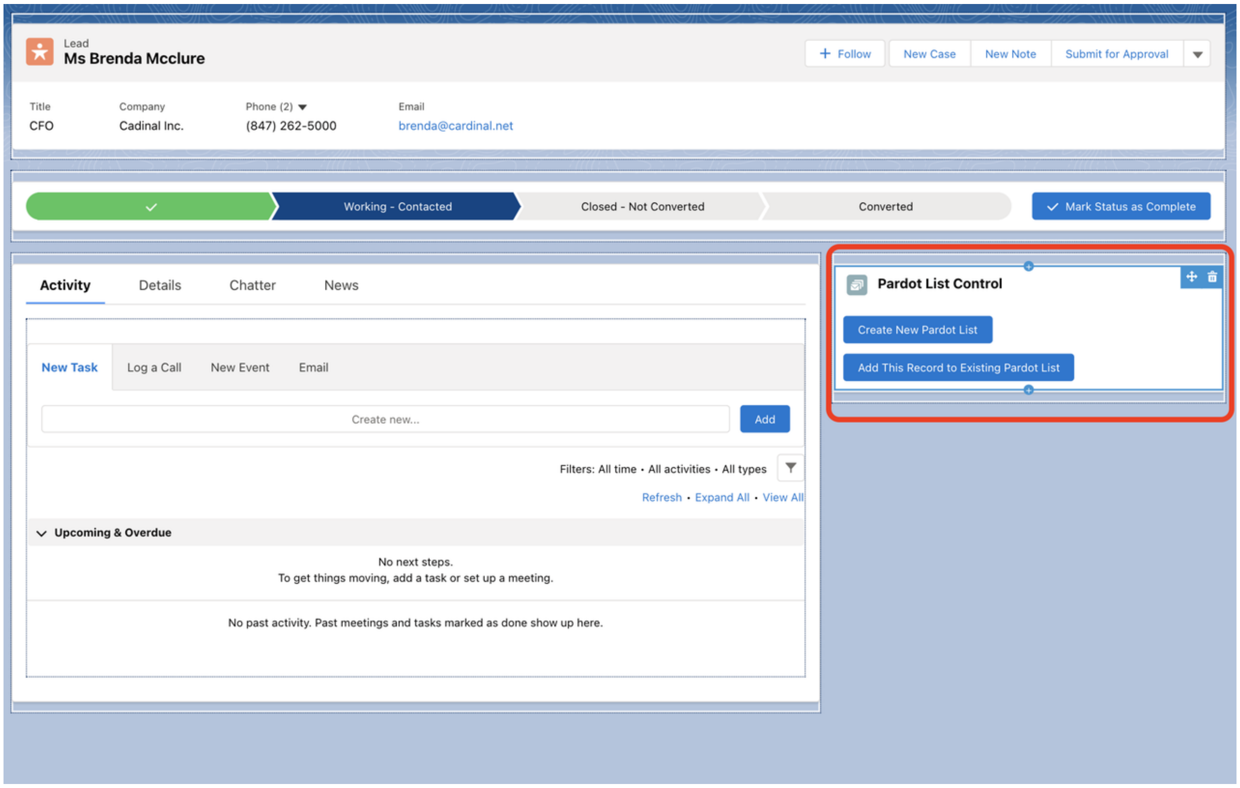
- Now, head to either Lead or Contact from your Application Launcher and click Edit Page



- Locate the Lightning Web Component from the left had 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



- Now click save and activate

Resources

1. Video walkthrough - How to use this component