Enhanced Engagement History for Pardot

User/Install Guide

Last updated: 31/01/2022

Introduction

Watch the overview video here

As a user with access to multiple Pardot Business Units, it can be difficult to get an accurate and consistent view of a Prospect's Engagement History across all Pardot Business Units in Salesforce. The standard component displays Engagement History only for the Business Unit you are currently logged in to, even if the Lead / Contact / Person Account record is synced with a Prospect in a different Pardot Business Unit.

Enhanced Engagement History is a custom Lightning Component which is added to the Lead / Contact / Person Account record page. It shows the Engagement History from one or more Pardot Business Units with no need to leave the record page to log in to a specific Business Unit. Activities are combined in a single view and tagged with the Business Unit they relate to. The timeline can also be filtered by Business Unit to view a targeted subset of Prospect Activities.

Additional enhancements include a pop-up viewer which displays a preview of email content for any Email Activities.

This document outlines the steps for installing the Enhanced Engagement History app and a troubleshooting guide. Please note this does not cover instructions for implementing Pardot Business Units - for more information, view the Salesforce Pardot Business Units Implementation guide or speak to your implementation partner.

Prerequisites

In order to use Enhanced Engagement History, the following prerequisites apply:

- Enterprise, Unlimited, Force.com, Developer, Performance Salesforce edition
- Pardot Advanced or Premium edition
- Pardot Business Units must be functionally implemented. For more help, view the implementation guide, speak to your implementation partner or contact Nebula for support.
- Each Pardot Business Unit must have a verified Salesforce Connector and be using Marketing Data Sharing Rules in order for Prospect Activities to display in the Enhanced Engagement History component.

Registered address: International House, 24 Holborn Viaduct, City of London, London EC1A 2BN
Company Reg No. 7953371 VAT Reg 133944803
Email: nebulaconsulting.co.uk Tel: 0207 1128026

Getting Started

After clicking the install link, select **Install for Admins only**. Only admins will need to configure the app. A permission set granting regular users the ability to view the App is available during configuration.

Permission Sets

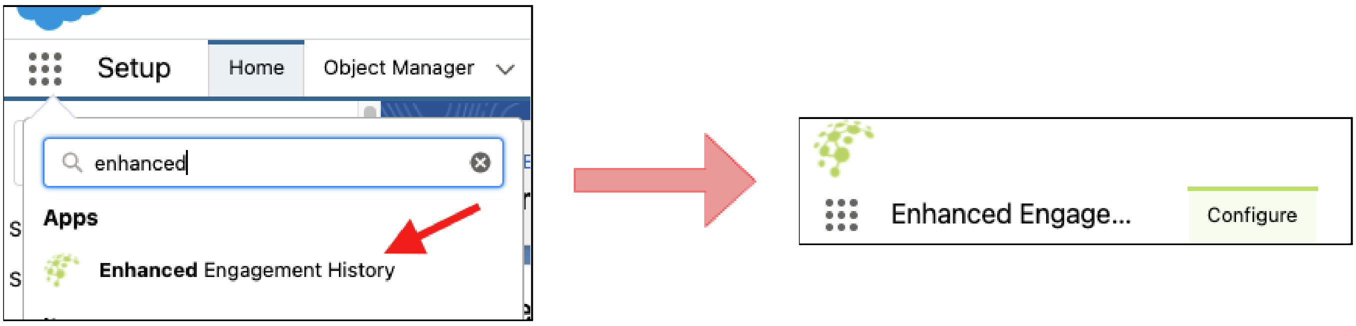
There are 2 permission sets for this component:

Enhanced Engagement History Admin
Assign this permission set to administrators who will configure the component.

Enhanced Engagement History User
Assign this permission set to any users who will need to view the Enhanced Engagement History component.

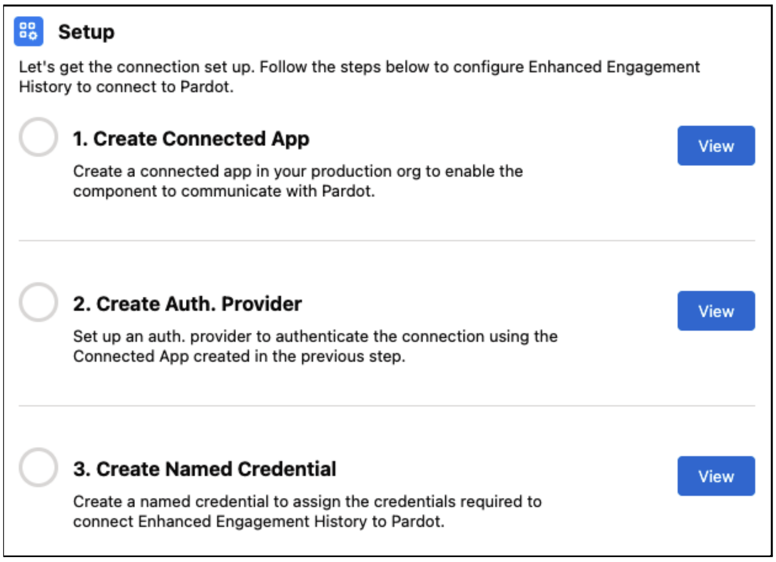
Configuration

Click on the App Launcher and navigate to the **Enhanced Engagement History** App, from here be sure to select the **Configure Tab**. This tab guides you through the initial setup. All settings configured here can also be accessed via the Setup menu for future changes.



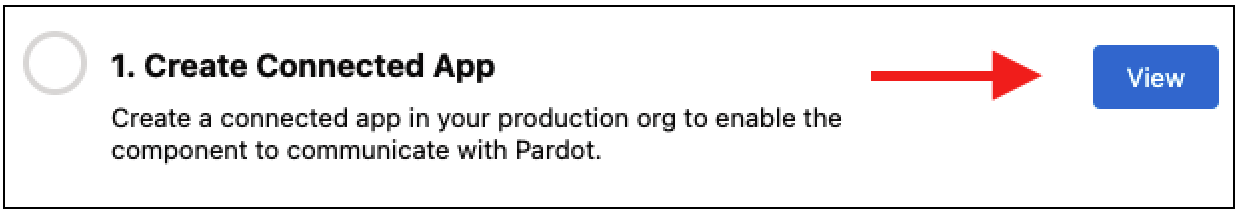
Setup

The left-hand panel in the Configure tab displays the Setup wizard. This includes three steps to connect Enhanced Engagement History to Pardot. Follow these steps below to get started:

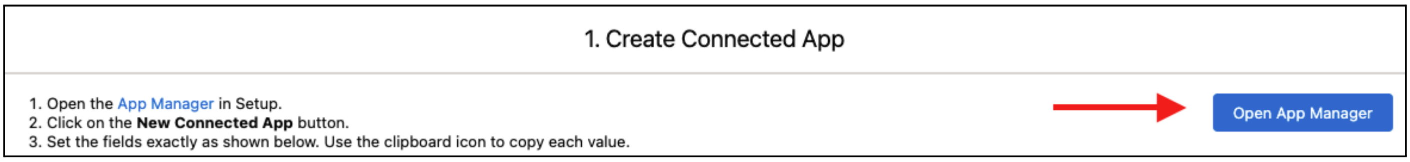


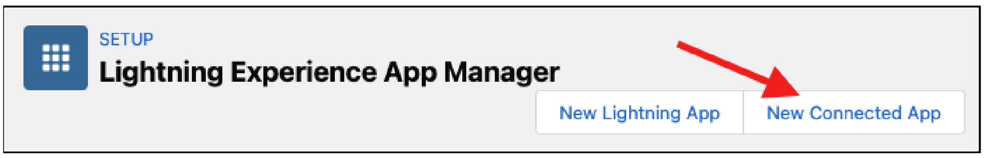
Step 1: Create Connected App

Create a new connected app by first clicking the "View" button. The setup window should then appear. The fields below are pre-populated for you to easily copy and paste into the Connected App setup screen.



To proceed, click on "Open App Manager" at the top right. This will open the App Manager in a new window. Click "New Connected App".



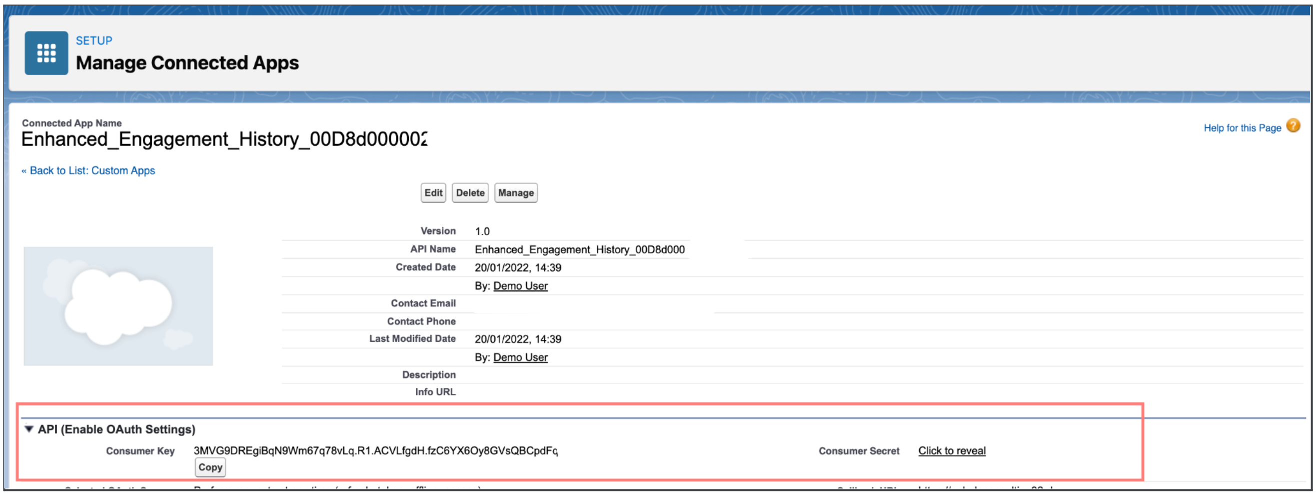


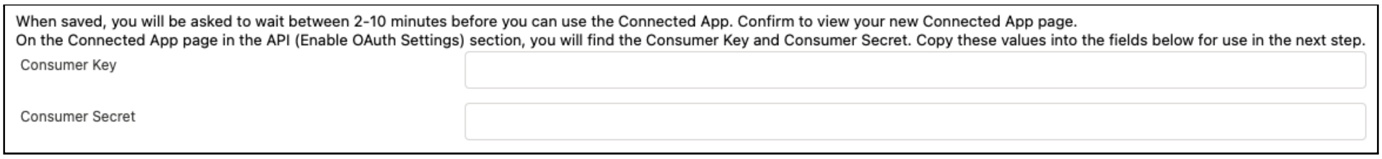
Now you will need to set the fields exactly as shown in the setup window, and below:

PLEASE NOTE: Ensure there are no line breaks or spaces at the end of each field

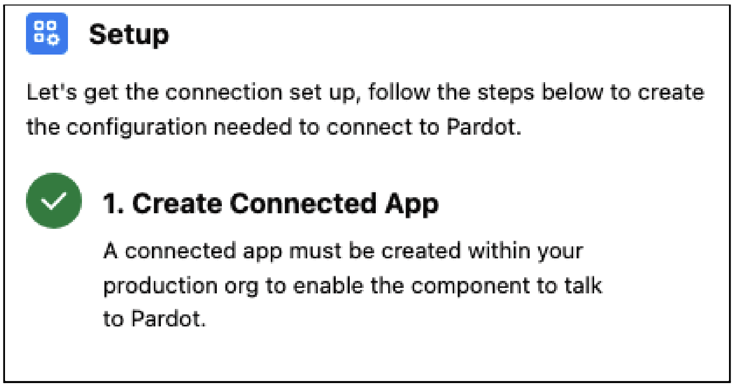
- **Connect App Name**: Enhanced_Engagement_History_{ORG_ID}
- **API Name**: Enhanced_Engagement_History_{ORG_ID}
- **Contact Email**: Administrator email address
- **Enable OAuth Settings**: YES
- **Enable for Device Flow**: NO
- **Callback URL**: e.g. https://mydomain.my.salesforce.com/services/authcallback/Enhanced_Engagement_History
- **Use digital signatures:** NO
- **Selected OAuth Scopes**:
  Manage Pardot Services (pardot_api)
  Perform requests on your behalf (refresh_token, offline_access)
- **Require Secret for Web Server Flow**: YES
- **Require Secret for Refresh Token Flow**: YES
- **Introspect All Tokens:** NO

Creating the Connected App will generate your Consumer Key and Consumer Secret values that will be used in the next step. Copy and paste these values into the respective fields at the bottom of the Enhanced Engagement History setup window before clicking Verify.





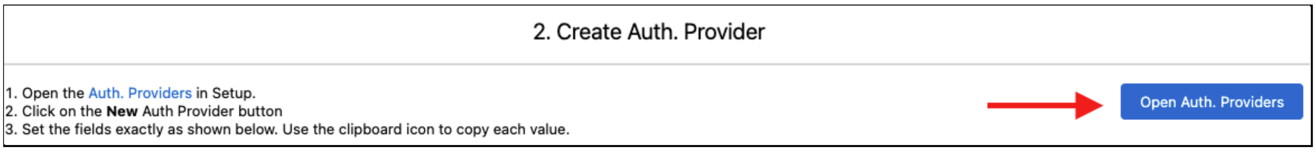
That's step 1 of the setup complete!



Nebula consulting

Step 2: Auth. Provider

Click ‘View’ in step 2 to open a new setup window, then select “Open Auth. Providers”.



This will open the Auth Providers setup menu in a new window. Click ‘New’ Select Salesforce as the Provider Type. Use the clipboard icon to copy the fields from the Enhanced Engagement History setup window and paste them into the respective fields of the Auth. Provider.

PLEASE NOTE: Ensure there are no line breaks or spaces at the end of each field.

Follow these steps to create a new Auth. Provider:

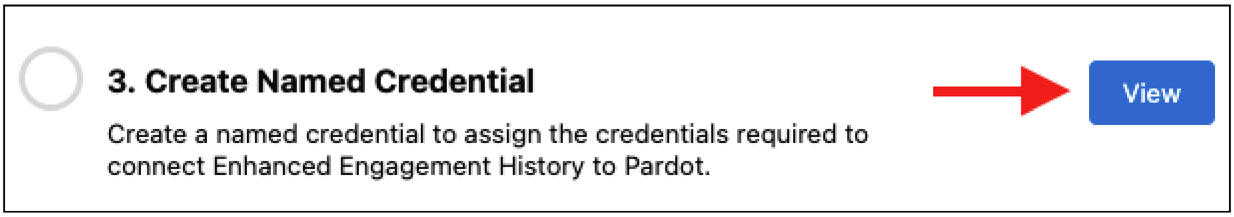
- **Provider Type**: Salesforce
- **Name**: Enhanced_Engagement_History
- **URL Suffix**: Enhanced_Engagement_History
- **Consumer Key**: Consumer Key from Connected App.
- **Consumer Secret**: Consumer Secret from Connected App.
- **Authorize Endpoint URL**: e.g. https://*mydomain*.my.salesforce.com/services/oauth2/authorize
- **Token Endpoint URL**: e.g. https://*mydomain*.my.salesforce.com/services/oauth2/token
- **Default Scopes**: pardot_api refresh_token
- **Include Consumer Secret in API Responses**: NO

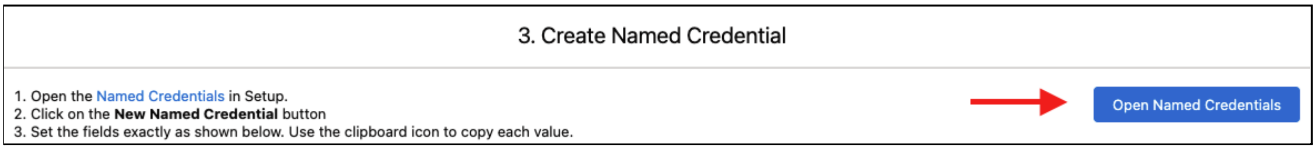
The Callback URL defined in this Auth Provider must match one of the URLs in the Callback URL field in the Connected App. Add it if it doesn't.

Make sure that “Include Consumer Secret in API Responses” is unchecked. Double check the entered fields using the list above and the setup window. Once done, click “Save” in the Auth. Provider window. Return to the Enhanced Engagement History setup window and click “Verify” to complete Step 2.

Step 3: Named Credential

Click on "View" to the right of Step 3 in the Enhanced Engagement History Configure tab and then "Open Named Credentials" to open a new window.





Click on "New Named Credential" and enter the fields outlined in the setup window and shown below. Leave the Certificate, Scope and Outbound Network Connection fields blank.

PLEASE NOTE: Ensure there are no line breaks or spaces at the end of each field.

Create a new Named Credential:

- **Label**: e.g. Pardot_API_{ORG_ID}
- **Name**: Pardot_API_{ORG_ID}
- **URL**: https://pi.pardot.com (or https://pi.demo.pardot.com if you are using a Sandbox or Demo Pardot environment)
- **Certificate:** *Leave blank*
- **Identity Type**: Named Principal
- **Authentication Protocol**: OAuth 2.0
- **Authentication Provider**: Enhanced_Engagement_History (as created above)
- **Scope:** *Leave Blank*
- **Start Authentication Flow on Save**: YES
- **Callout Options**
    - Generate Authorization Header: TRUE
    - Allow Merge Fields in HTTP Header: FALSE
    - Allow Merge Fields in HTTP Body: FALSE
- **Outbound Network Connection:** *Leave Blank*

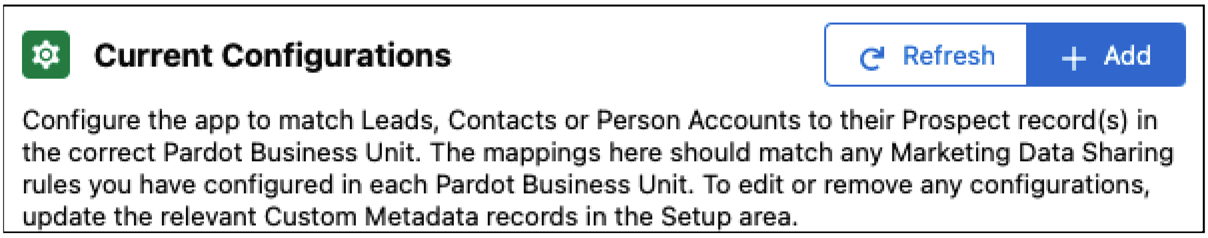
After clicking on save, you will be asked to authenticate with a Salesforce user account. This user must have access to all Pardot Business Units connected to Enhanced Engagement History. Enter the credentials and click Allow.

Once you have saved and chosen the user to authenticate, go back to the Enhanced Engagement History setup window and click “Verify” at the bottom right.

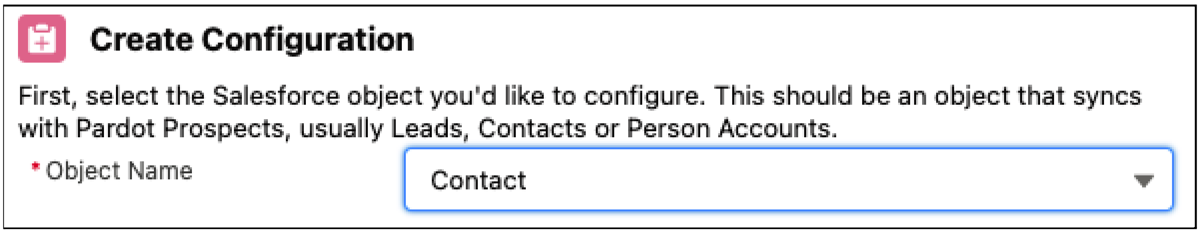
Step 3 completed!

Current Configurations (Custom Metadata)

Now that the app is set up you can add your current Business Unit configurations using the “Current Configurations” box to the right of the “Setup” box. This section details how Leads / Contacts are mapped to Pardot Business Units and should match the Marketing Data Sharing Rules configured in your Pardot - Salesforce connector for each Business Unit.

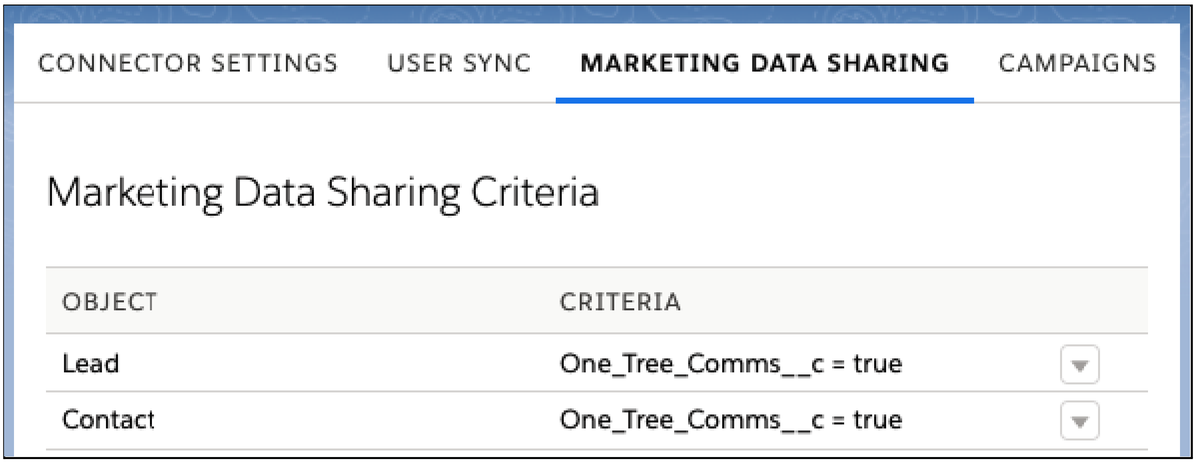


The custom metadata created here links the Pardot Business Unit and Named Credential with the Prospect object and relevant field in Salesforce. Click “+Add” and enter the following information:

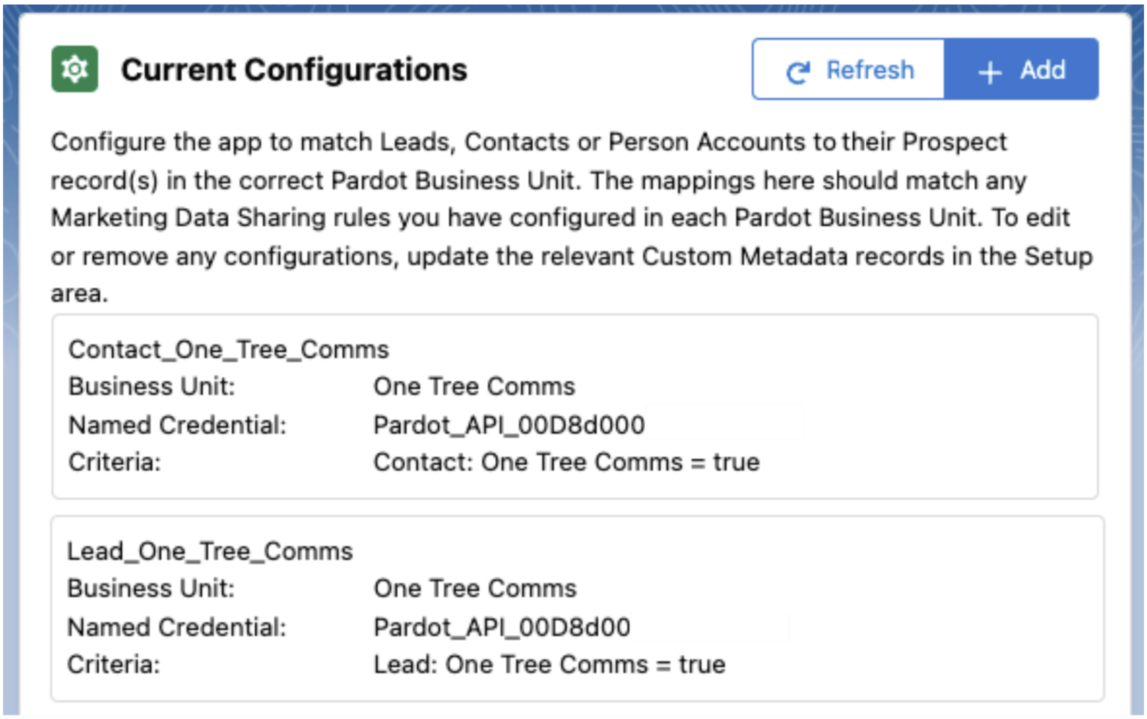


- **Object Name**: Object this configuration is related to, e.g. "Lead".
- **Business Unit**: Name of the Business Unit. Provided in the dropdown of the initial configuration.
- **Named Credential**: This must be the Name of the Named Credential, not the Label. This will be pre-populated in the dropdown.
- **Checkbox field**: Select whether the object field is a checkbox (true/false).
- **Field Name**: The field on the object related to the Business Unit, e.g. "EMEA". This is the name of the field used to match Leads / Contacts to Prospects in this Pardot Business Unit, as specified in the Marketing Data Sharing Rules for this Business Unit.
- **Field Value**: The value to match against the field above for this configuration to apply, e.g. "true". If the field is a checkbox, this will automatically be populated with “true”.

The configurations here should match the Marketing Data Sharing rules in each Pardot Business Unit you are connecting to Enhanced Engagement History. For example, you may have a Pardot Business Unit using connector settings like this:

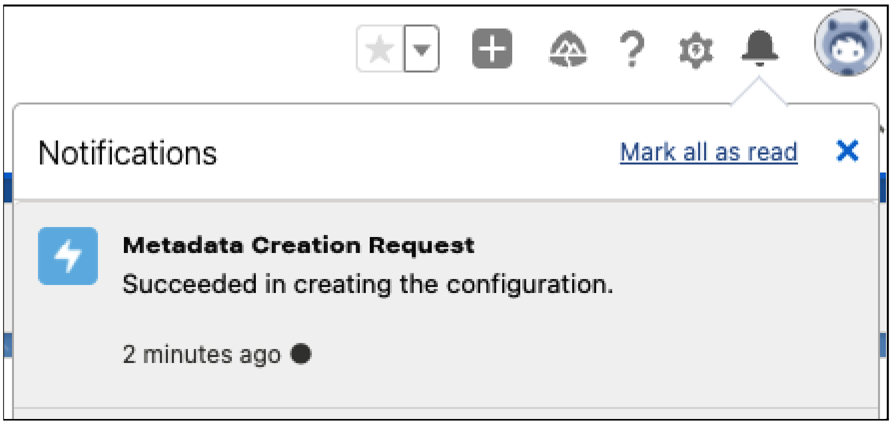


The Enhanced Engagement History configurations for this Business Unit would look like this:

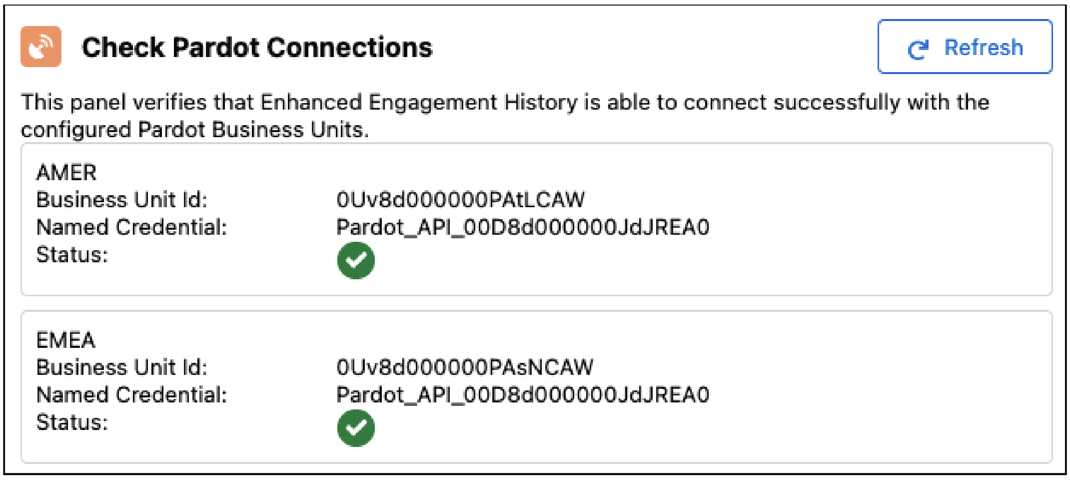


Repeat these configurations for each Business Unit and each object you wish to connect to Enhanced Engagement History (typically Leads and Contacts for each Business Unit).

Once you click “Create”, it will start the configuration process. You will receive a notification when this has completed successfully (this should only take a few moments).



Once you have configured all of your Business Units and Objects, you can check the connection status by clicking “Refresh” in the Pardot Connection box to the right of the configuration:



Removing/Editing configurations:

If you need to edit or remove a configured Business Unit/Object:

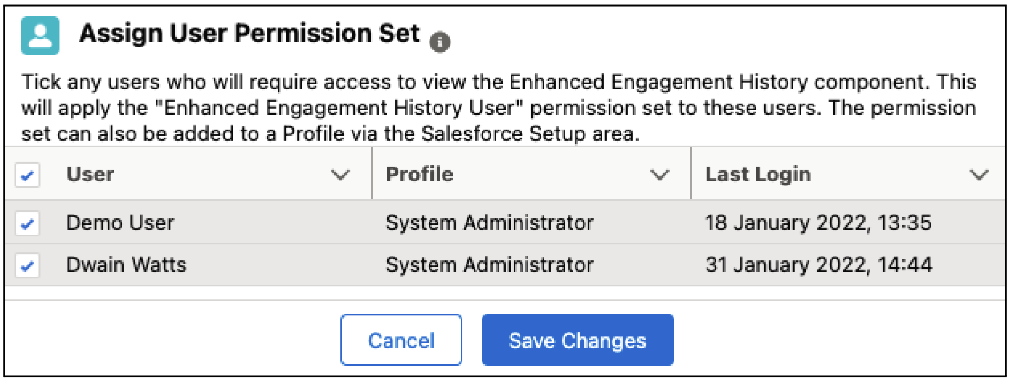
1. Go to the Salesforce Setup page
2. Type “Metadata” in the search box and select “Custom Metadata types”
3. Click “Manage Records”.
4. From here, edit or delete a configuration that you have set up

New configurations can be added from the Enhanced Engagement History Configure tab.

Assign User Permission Set

Within the Enhanced Engagement History Configure tab, there is a quick user permission set Enablement to the right.

This will apply the Enhanced Engagement History User permission set to selected Users and enable them to view the custom Lightning component. Simply check the users and click “Save changes”. This permission set can also be added to a Profile via the Salesforce Setup area.



Adding to Lightning Pages

Once the configuration is complete, add the Enhanced Engagement History component to your Lead and Contact Lightning Page Layouts to enable users to see them.

Edit the relevant Lightning Page Layout, and place the **Enhanced Engagement History** component where required.

Additional Configuration Options

- **Title**: Rename the title of the component to suit your business requirements, the default is: Enhanced Engagement History
- **Page Size**: Show any number of Engagement Histories per page, default: 5
- **Show Actual Times**: Replaces the relative times for each activity with the actual date and time

Troubleshooting

Error Messages:

“This component has no configuration for the <CURRENT> object”

- There is no configuration in the **Enhanced Engagement History Config** CMDT for the record object the component has been placed onto.
- Add configuration to map the fields to the business unit.

“You don't have permission to view this data.”

- The current user either has no access to the current record, or the matching business unit field on that record. Review the Field Level Security for the matching business unit field so that the user can see the Engagement History.
- This is one of the security mechanisms that prevents users from viewing prospect Engagement History in Business Units they aren’t allowed to view.

“No credentials were found.”

- There are no matching valid fields for the current record. The component is unable to find a related Pardot Business Unit for this record.
- If a record is not in a Business Unit their activity will not show.
- If this is incorrect, verify the configuration for the field is correct in the **Enhanced Engagement History Config.**

“Business Unit Id not found or inactive.”

- The Business Unit Id is not accessible by the Named Credential user, or is incorrect in the configuration. Verify the configuration for the Business Unit Id field is correct in the **Enhanced Engagement History Config.**

“Named Credential has not been authorized. Edit the Named Credential starting with Pardot_API, and click Save. This will start the Authentication Flow.”

- The Named Credential has been created but the authentication flow hasn’t been completed.

“The prospect could not be found in the [NAME] business unit.”

- This prospect is either not in the Business Unit for the matching configuration, or the configuration is incorrect.

Registered address: International House, 24 Holborn Viaduct, City of London, London EC1A 2BN
Company Reg No. 7953371 VAT Reg 133944803
Email: nebulaconsulting.co.uk Tel: 0207 1128026