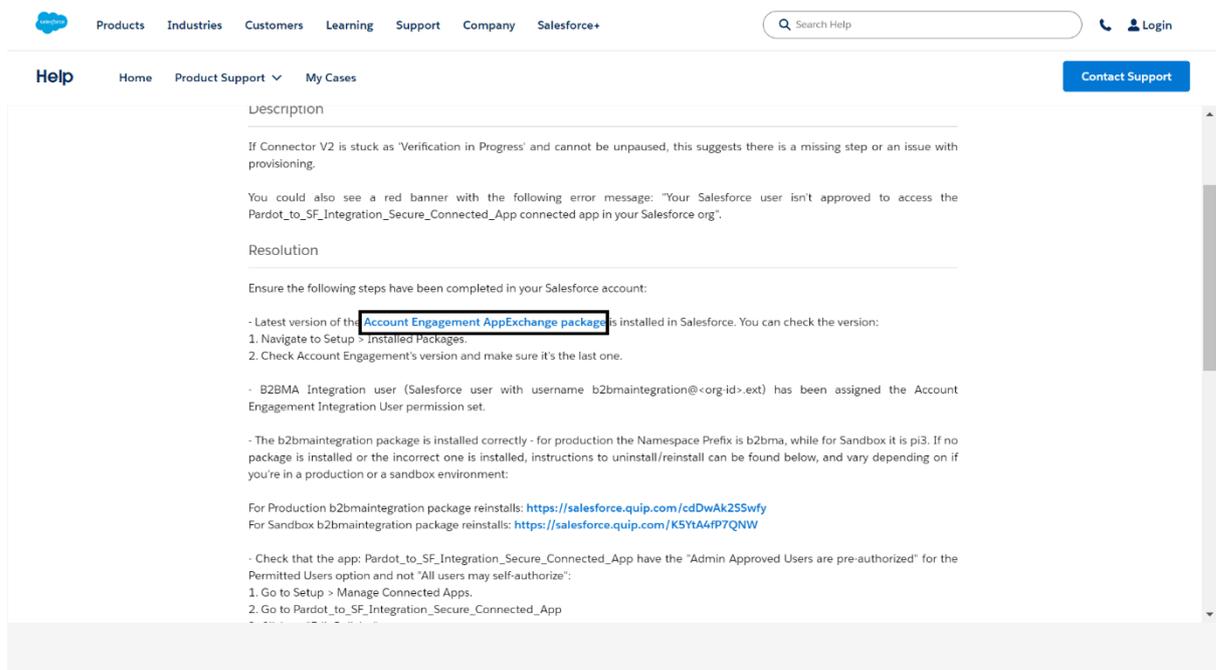


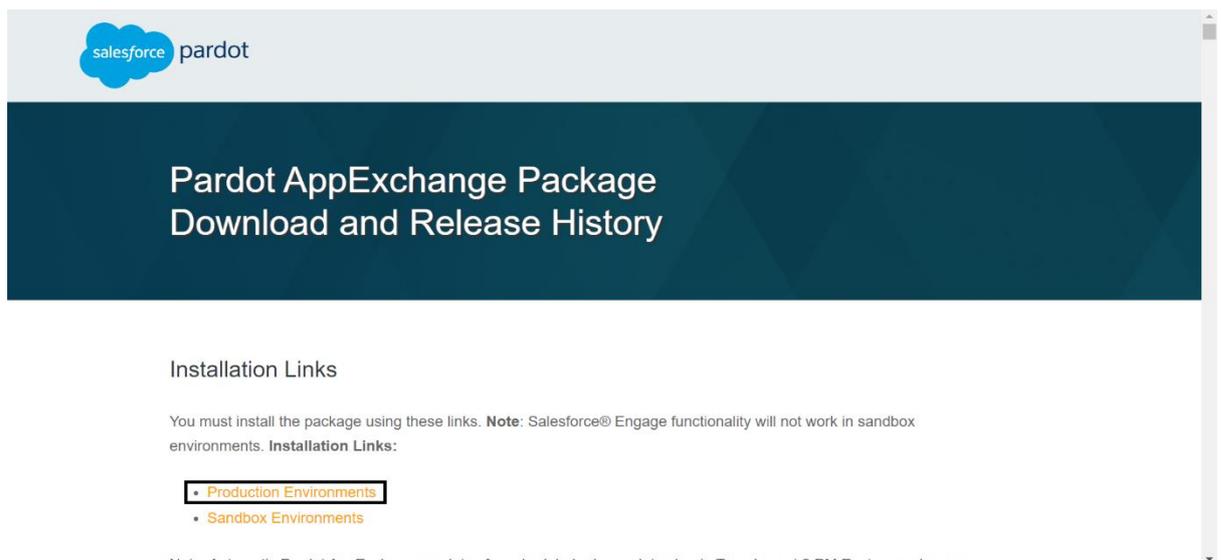
How to Enable Account Engagement for User

1. Go to this link: - <https://help.salesforce.com/s/articleView?id=000380206&type=1>
2. Click on "Account Engagement AppExchange package" link



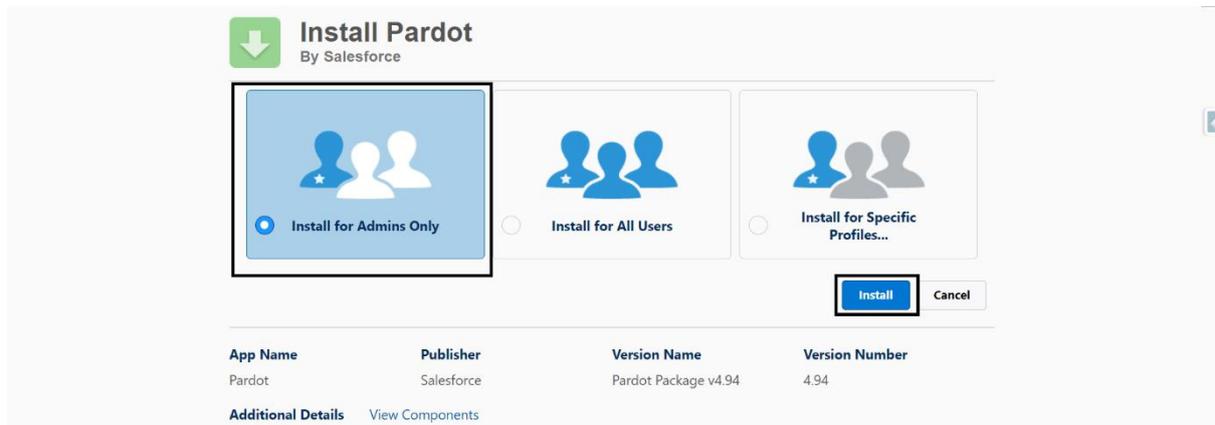
The screenshot shows the Salesforce Help page for the "Account Engagement AppExchange package". The page has a navigation bar with "Products", "Industries", "Customers", "Learning", "Support", "Company", and "Salesforce+". A search bar and a "Login" button are also visible. The main content area is titled "Description" and "Resolution". The "Description" section states: "If Connector V2 is stuck as 'Verification in Progress' and cannot be paused, this suggests there is a missing step or an issue with provisioning. You could also see a red banner with the following error message: 'Your Salesforce user isn't approved to access the Pardot_to_SF_Integration_Secure_Connected_App connected app in your Salesforce org'." The "Resolution" section lists steps to ensure the package is installed correctly, including navigating to Setup > Installed Packages, checking the version, and ensuring the B2BMA Integration user has the necessary permissions. It also provides links for production and sandbox package reinstalls.

3. Select "Production Environments"

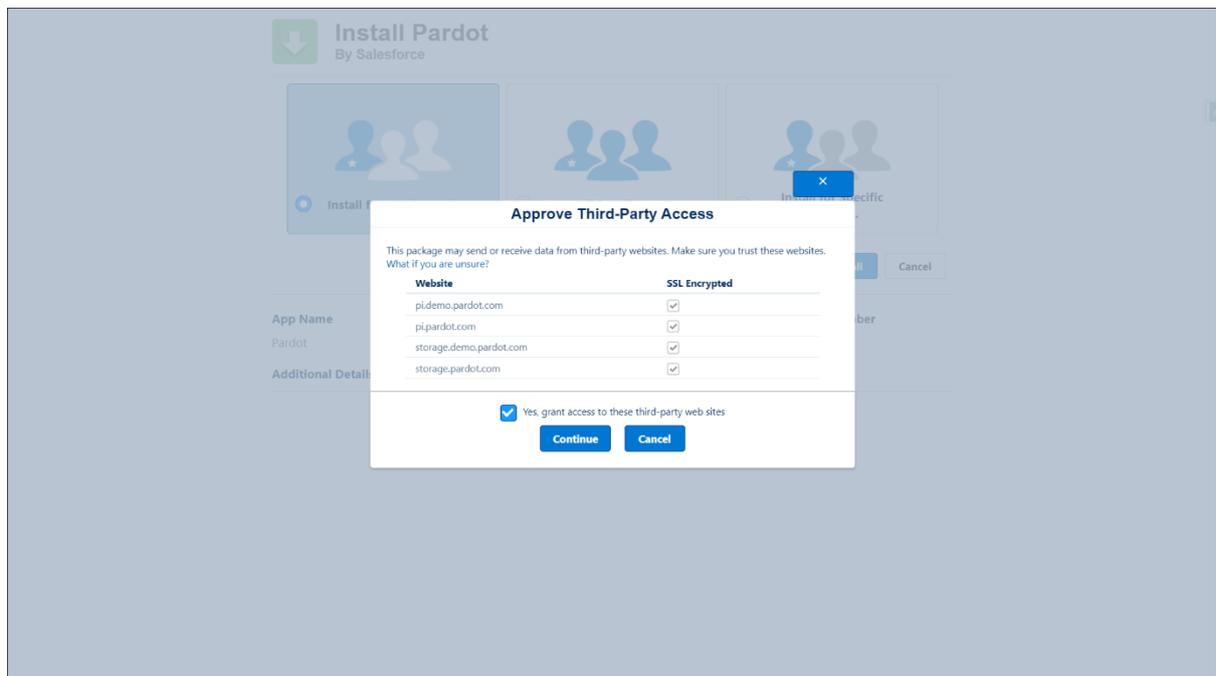


The screenshot shows the "Pardot AppExchange Package Download and Release History" page. The page features the Salesforce and Pardot logos at the top. The main heading is "Pardot AppExchange Package Download and Release History". Below the heading, there is a section titled "Installation Links" with a note: "You must install the package using these links. Note: Salesforce® Engage functionality will not work in sandbox environments. Installation Links:". Underneath, there are two links: "Production Environments" (highlighted with a red box) and "Sandbox Environments". At the bottom, there is a note: "Note: Automatic Pardot AppExchange updates for scheduled release dates begin Tuesday at 9 PM Eastern and may process..."

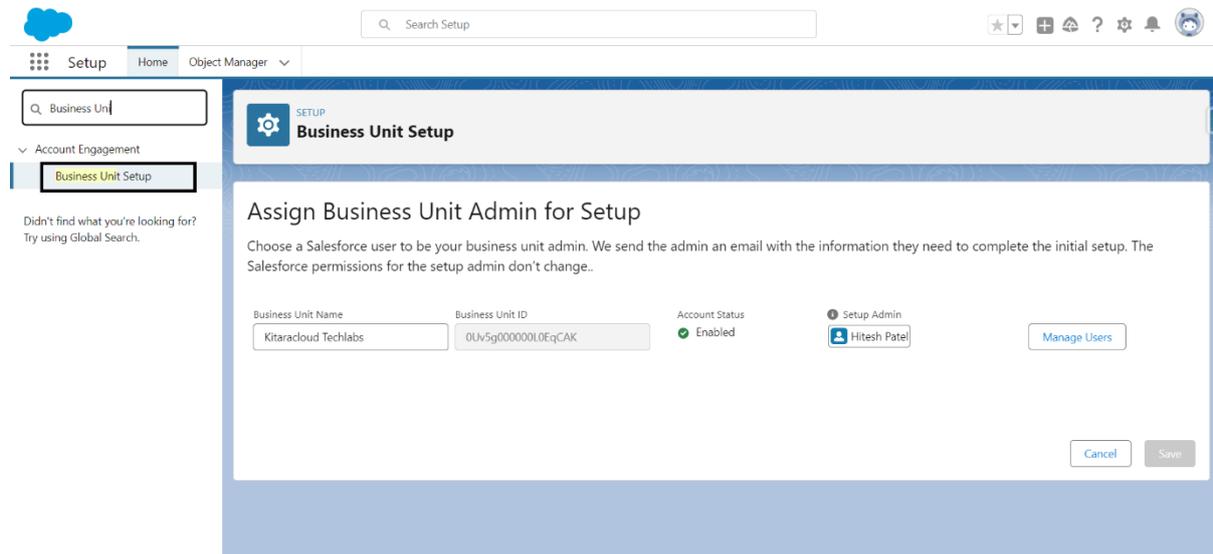
4. Login with your credentials → Select the option “Install for Admins Only” → click the “Install” button.



5. Select check same as below screenshot → Click on “Continue”

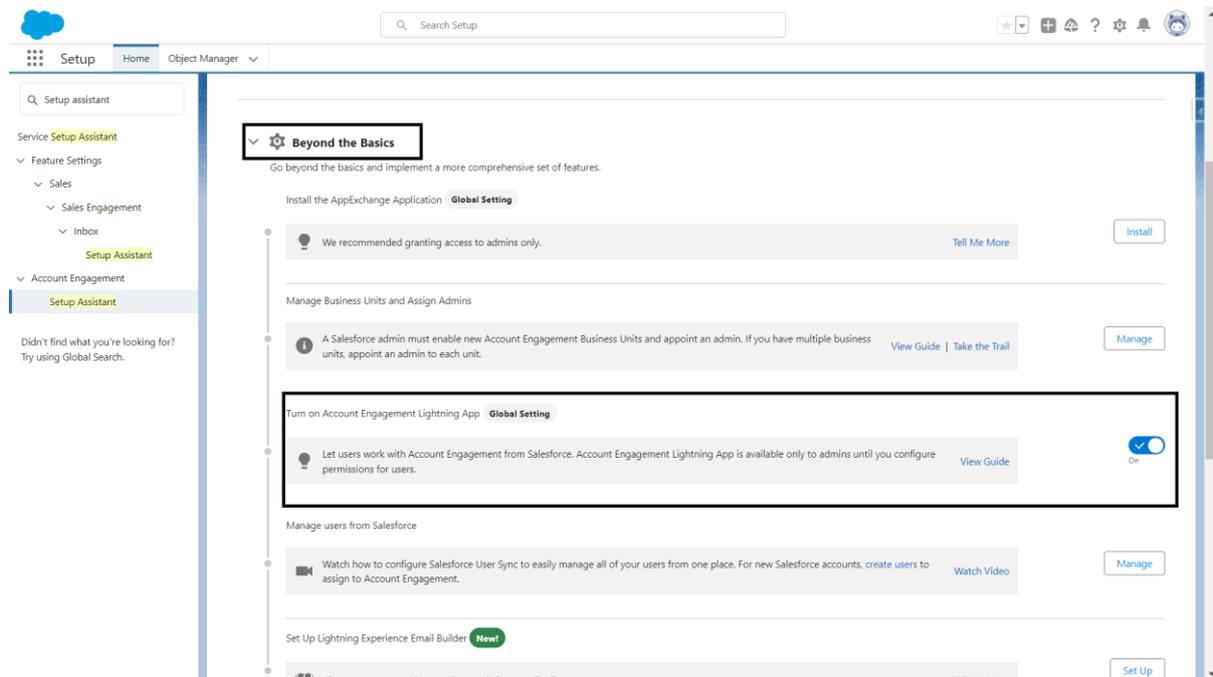


6. After Installation Successful, Go to Setup → Quick Find → Search for “**Business Unit Setup**” → Follow the steps on the screen and setup the User as Admin → click the “**Save**” button.



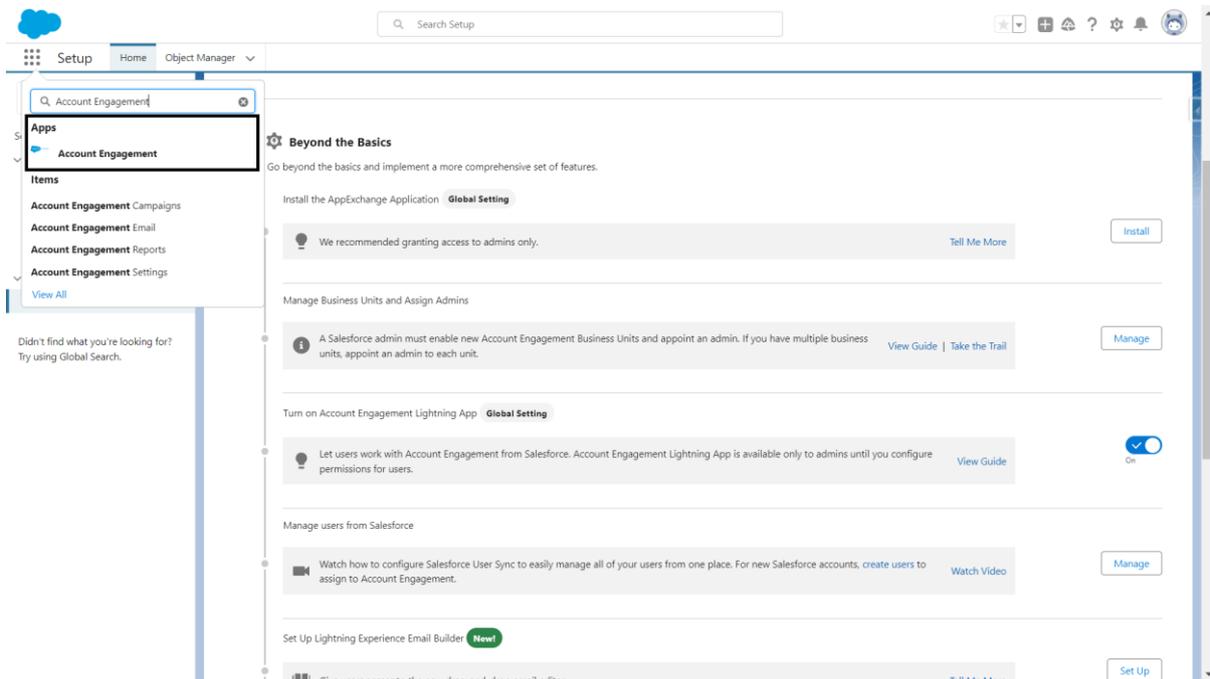
The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with "Business Un" entered and a list of results including "Business Unit Setup". The main content area is titled "Business Unit Setup" and contains the heading "Assign Business Unit Admin for Setup". Below the heading is a paragraph: "Choose a Salesforce user to be your business unit admin. We send the admin an email with the information they need to complete the initial setup. The Salesforce permissions for the setup admin don't change..". There are four input fields: "Business Unit Name" (Kitaracloud Techlabs), "Business Unit ID" (0LjvSg00000LOEqCAK), "Account Status" (Enabled), and "Setup Admin" (Hitesh Patel). A "Manage Users" button is next to the Setup Admin field. At the bottom right, there are "Cancel" and "Save" buttons.

7. Go to Setup → Quick find → Search for “**Setup Assistant**” → Go to “**Beyond basics**” Section → Enable “**Account Engagement**” Lightning App

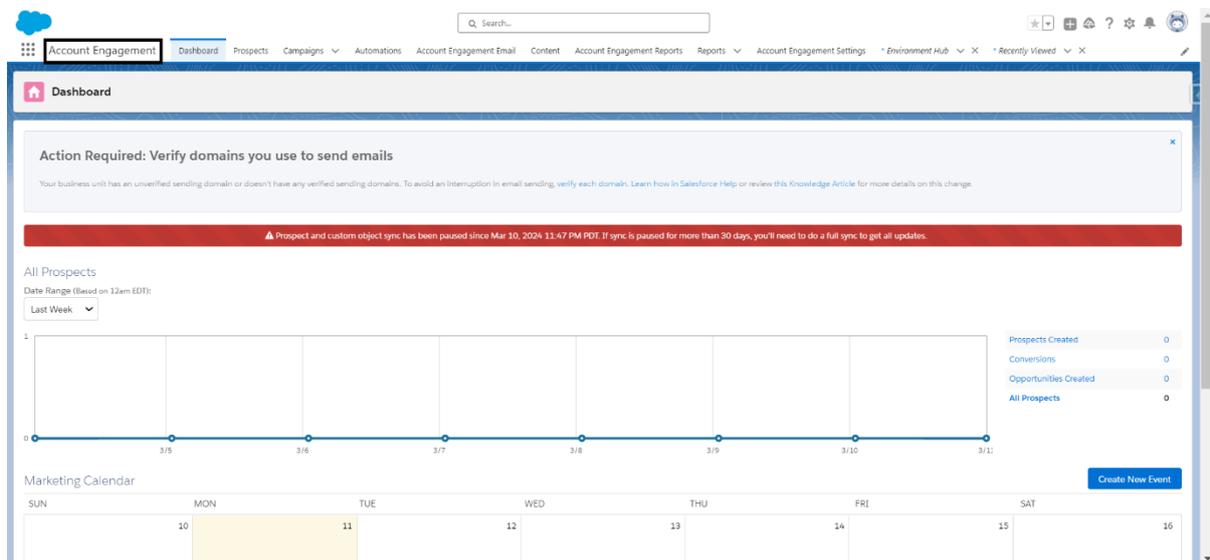


The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with "Setup assistant" entered and a list of results including "Setup Assistant". The main content area is titled "Beyond the Basics" and contains several sections. The "Turn on Account Engagement Lightning App" section is highlighted with a red box. It has a "Global Setting" header and a paragraph: "Let users work with Account Engagement from Salesforce. Account Engagement Lightning App is available only to admins until you configure permissions for users." To the right of this paragraph is a "View Guide" link and a toggle switch that is currently turned "On". Other sections include "Install the AppExchange Application", "Manage Business Units and Assign Admins", "Manage users from Salesforce", and "Set Up Lightning Experience Email Builder".

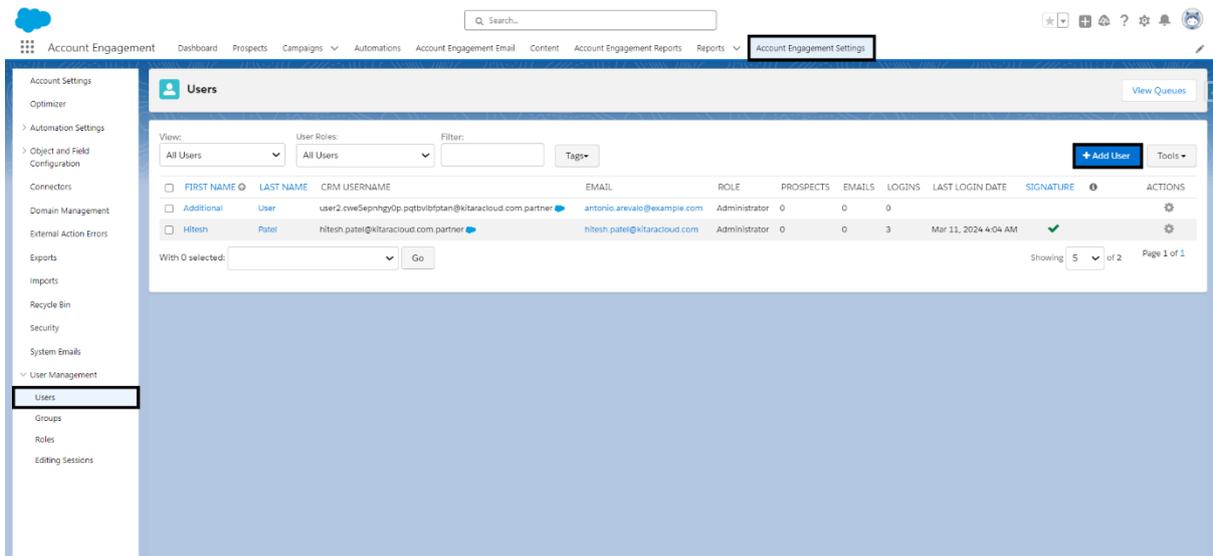
8. Now, “Account Engagement” app should be visible in your app launcher.



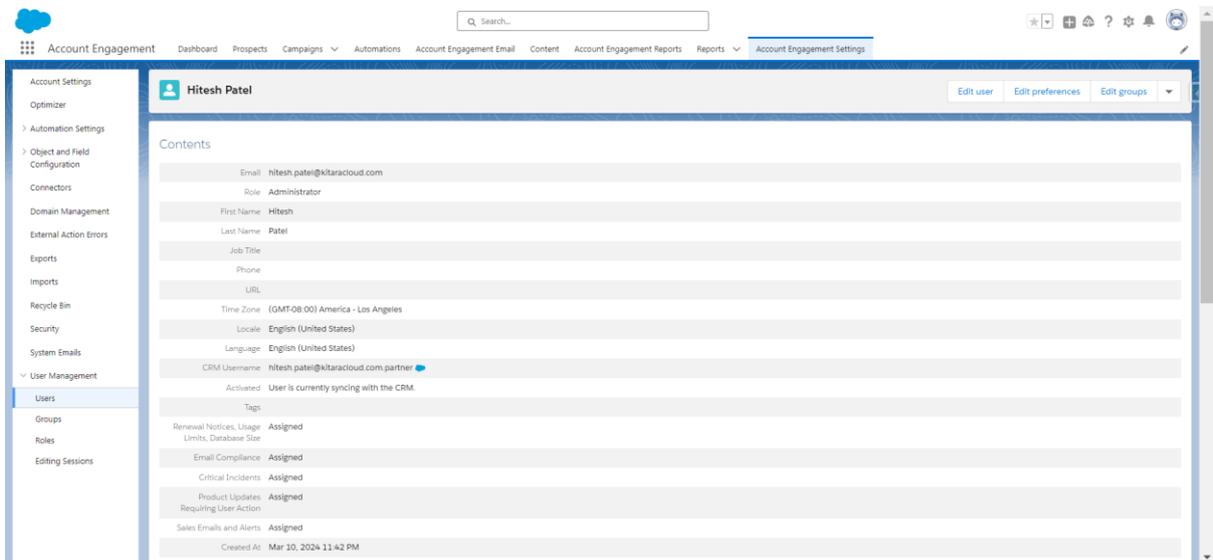
9. Navigate to “Account Engagement” from App Launcher.



10. Go to “Account Engagement Settings” → Select “User” under “User Management” → Click the “Add User” button.



11. Create a new user within the Account Engagement platform mirroring the details of the corresponding Salesforce user.



14. Go to Setup → Search for “App Manager” in Quick Find.

41 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type

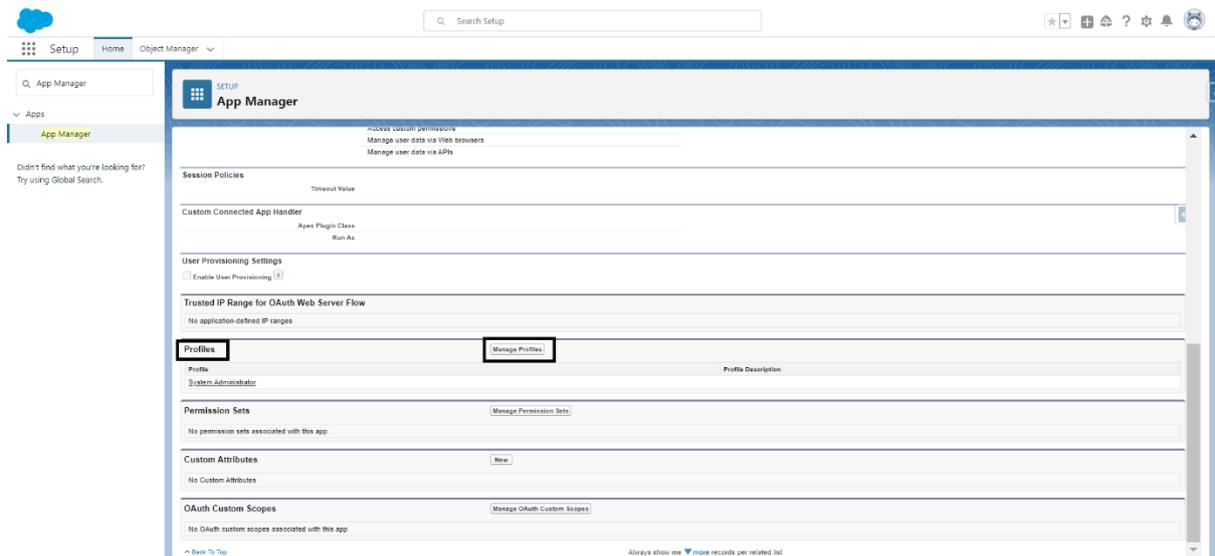
App Name	Developer Name	Description	Last Modified	App Type	VL
00D2w00000bNn Service Provider			12/21/2022, 11:22 PM	Classic	
2G Package Manager	SecondGenerationPackageManag...	Second Generation Package Manager	1/16/2024, 2:16 AM	Lightning (Managed)	
Account Engagement	PardotAppV1	B2B Marketing Automation	3/10/2024, 11:29 PM	Lightning	
All Tabs	AllTabSet		9/1/2022, 6:40 AM	Classic	
Ant Migration Tool	Forcecom_Migration_Tool	The Force.com Migration Tool is a Java/Ant-based command-line utility for moving metadata between a local directory a...	7/27/2023, 6:57 AM	Connected (Managed)	
App Launcher	AppLauncher	App Launcher tabs	9/1/2022, 6:40 AM	Classic	
b2bma_canvas	b2bma_canvas		3/8/2024, 7:58 AM	Connected (Managed)	
Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	9/1/2022, 6:40 AM	Lightning	
Checkout Management App	Checkout_Management_App		9/27/2023, 10:26 PM	Classic (Managed)	
Community	Community	Salesforce CRM Communities	9/1/2022, 6:40 AM	Classic	
Dataloader Bulk	Dataloader_Bulk	The Data Loader is an easy to use graphical tool that helps you to get your data into Salesforce objects.	7/27/2023, 6:56 AM	Connected (Managed)	
Dataloader Partner	Dataloader_Partner	The Data Loader is an easy to use graphical tool that helps you to get your data into Salesforce objects.	7/27/2023, 6:57 AM	Connected (Managed)	
DevOps Center	DevOps_Center		2/7/2023, 4:32 AM	Connected	
DevOps Centers	DevOps_Centers		2/7/2023, 11:37 PM	Connected	
Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	9/1/2022, 6:40 AM	Lightning	
Environment Hub	EnvironmentHub	The Environment Hub lets you view, connect, and access all your organizations from one location. This simplifies managin...	9/1/2022, 6:40 AM	Classic	
Environment Hub	HUB_zunife4jrd5pfehm46	The Environment Hub lets you view, connect to, and access all your organizations from one location.	9/1/2022, 6:44 AM	Connected	
Force.com IDE	Forcecom_IDE	The Force.com IDE is a powerful client application for creating, modifying, testing and deploying Force.com applications b...	7/27/2023, 6:57 AM	Connected (Managed)	
Goldcast	Goldcast	Goldcast Application	12/19/2023, 11:55 PM	Lightning (Managed)	

15. From App Manager click on the dropdown next to “b2bma_canvas” App → Select “Manage”.

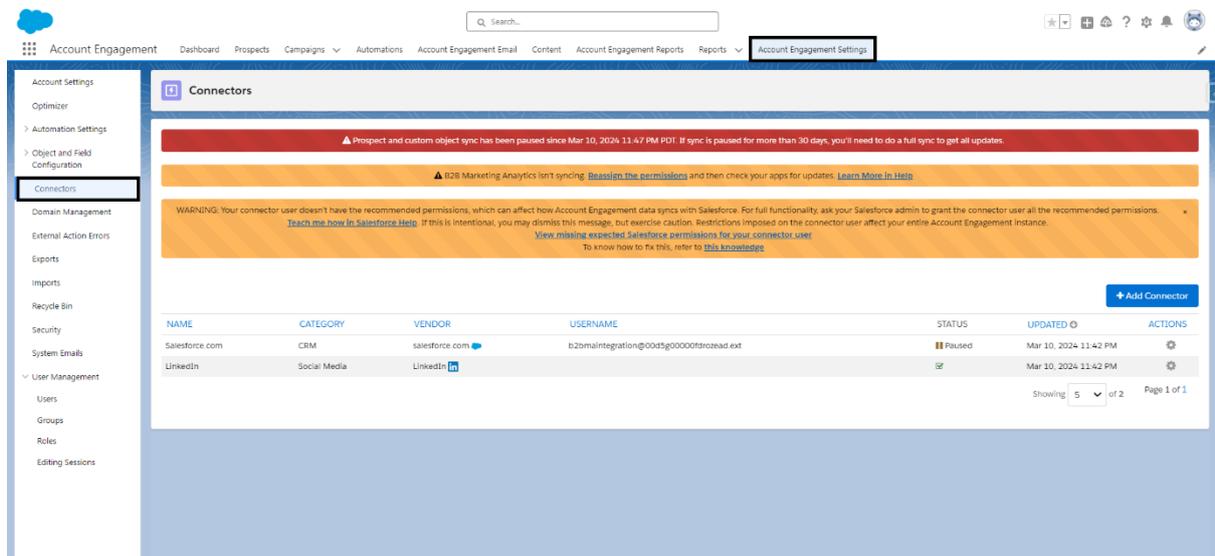
41 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type

App Name	Developer Name	Description	Last Modified	App Type	VL
00D2w00000bNn Service Provider			12/21/2022, 11:22 PM	Classic	
2G Package Manager	SecondGenerationPackageManag...	Second Generation Package Manager	1/16/2024, 2:16 AM	Lightning (Managed)	
Account Engagement	PardotAppV1	B2B Marketing Automation	3/10/2024, 11:29 PM	Lightning	
All Tabs	AllTabSet		9/1/2022, 6:40 AM	Classic	
Ant Migration Tool	Forcecom_Migration_Tool	The Force.com Migration Tool is a Java/Ant-based command-line utility for moving metadata between a local directory a...	7/27/2023, 6:57 AM	Connected (Managed)	
App Launcher	AppLauncher	App Launcher tabs	9/1/2022, 6:40 AM	Classic	
b2bma_canvas	b2bma_canvas		3/8/2024, 7:58 AM	Connected (Managed)	
Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	9/1/2022, 6:40 AM	Lightning	
Checkout Management App	Checkout_Management_App		9/27/2023, 10:26 PM	Classic (Managed)	
Community	Community	Salesforce CRM Communities	9/1/2022, 6:40 AM	Classic	
Dataloader Bulk	Dataloader_Bulk	The Data Loader is an easy to use graphical tool that helps you to get your data into Salesforce objects.	7/27/2023, 6:56 AM	Connected (Managed)	
Dataloader Partner	Dataloader_Partner	The Data Loader is an easy to use graphical tool that helps you to get your data into Salesforce objects.	7/27/2023, 6:57 AM	Connected (Managed)	
DevOps Center	DevOps_Center		2/7/2023, 4:32 AM	Connected	
DevOps Centers	DevOps_Centers		2/7/2023, 11:37 PM	Connected	
Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	9/1/2022, 6:40 AM	Lightning	
Environment Hub	EnvironmentHub	The Environment Hub lets you view, connect, and access all your organizations from one location. This simplifies managin...	9/1/2022, 6:40 AM	Classic	
Environment Hub	HUB_zunife4jrd5pfehm46	The Environment Hub lets you view, connect to, and access all your organizations from one location.	9/1/2022, 6:44 AM	Connected	
Force.com IDE	Forcecom_IDE	The Force.com IDE is a powerful client application for creating, modifying, testing and deploying Force.com applications b...	7/27/2023, 6:57 AM	Connected (Managed)	

16. Scroll down to “Profiles” Section → Click the “Manage Profiles” button & add the “Profile” of the User to whom you want to enable the Account Engagement.



17. Add Salesforce Connector → Go to “Account Engagement” app → Click on “Account Engagement Settings” Tab → Click on “Connectors”



18. In Salesforce Connector Status in “Paused”

The screenshot shows the Salesforce Account Engagement interface. The left sidebar contains navigation options like Account Settings, Optimizer, and Automation Settings. The main content area is titled 'Connectors' and features a table with the following data:

NAME	CATEGORY	VENDOR	USERNAME	STATUS	UPDATED	ACTIONS
Salesforce.com	CRM	salesforce.com	b2bmainintegration@00d5g00000f0reoad.ext	Paused	Mar 10, 2024 11:42 PM	[Settings Icon]
LinkedIn	Social Media	LinkedIn		[Sync Icon]	Mar 10, 2024 11:42 PM	[Settings Icon]

Warning messages at the top indicate that prospect and custom object sync has been paused since Mar 10, 2024 11:47 PM PDT, and that B2B Marketing Analytics isn't syncing. The Salesforce.com connector's status is highlighted as 'Paused' in the table.

19. Go to Actions → Click on “Resume Sync”

This screenshot shows the same Salesforce Account Engagement interface as the previous one. The 'Salesforce.com' connector's status is 'Paused'. The 'ACTIONS' column for this connector is expanded, showing a dropdown menu with the following options:

- Edit Settings
- Resume Sync
- Sync Metadata
- Sync Queue (0)
- Sync Errors (0)
- Sync All Prospects
- Asset Sync Queue (0 | 0)

The 'Resume Sync' option is highlighted with a red box, indicating the next step in the process.

20. In Salesforce Connector status is "verified".

The screenshot shows the Salesforce Account Engagement interface. The top navigation bar includes 'Account Engagement', 'Dashboard', 'Prospects', 'Campaigns', 'Automations', 'Account Engagement Email', 'Content', 'Account Engagement Reports', and 'Reports'. The 'Account Engagement Settings' menu is open, showing 'Connectors' as the selected option. The left sidebar lists various settings categories, with 'Connectors' highlighted. The main content area is titled 'Connectors' and features a green status bar indicating 'Prospect and custom object syncing has been unpaused.' Below this, an orange warning banner states: '⚠️ B2B Marketing Analytics isn't syncing. Reassign the permissions and then check your apps for updates. Learn More in Help.' A larger orange warning banner follows: 'WARNING: Your connector user doesn't have the recommended permissions, which can affect how Account Engagement data syncs with Salesforce. For full functionality, ask your Salesforce admin to grant the connector user all the recommended permissions. Teach me how in Salesforce Help. If this is intentional, you may dismiss this message, but exercise caution. Restrictions imposed on the connector user affect your entire Account Engagement instance. View missing expected Salesforce permissions for your connector user. To know how to fix this, refer to this knowledge.' Below the warnings is a table of connectors with columns for NAME, CATEGORY, VENDOR, USERNAME, STATUS, UPDATED, and ACTIONS. Two connectors are listed: 'Salesforce.com' (CRM, salesforce.com, i2bmainintegration@0005g00000frozad.ext, verified, Mar 10, 2024 11:42 PM) and 'LinkedIn' (Social Media, LinkedIn, verified, Mar 10, 2024 11:42 PM). A '+ Add Connector' button is located at the bottom right of the table. The page footer indicates 'Showing 5 of 2 Page 1 of 1'.

Account Engagement Settings

Connectors

Prospect and custom object syncing has been unpaused.

⚠️ B2B Marketing Analytics isn't syncing. [Reassign the permissions](#) and then check your apps for updates. [Learn More in Help](#)

WARNING: Your connector user doesn't have the recommended permissions, which can affect how Account Engagement data syncs with Salesforce. For full functionality, ask your Salesforce admin to grant the connector user all the recommended permissions. [Teach me how in Salesforce Help](#). If this is intentional, you may dismiss this message, but exercise caution. Restrictions imposed on the connector user affect your entire Account Engagement instance. [View missing expected Salesforce permissions for your connector user](#). To know how to fix this, refer to [this knowledge](#).

NAME	CATEGORY	VENDOR	USERNAME	STATUS	UPDATED	ACTIONS
Salesforce.com	CRM	salesforce.com	i2bmainintegration@0005g00000frozad.ext	✔️	Mar 10, 2024 11:42 PM	⚙️
LinkedIn	Social Media	LinkedIn		✔️	Mar 10, 2024 11:42 PM	⚙️

+ Add Connector

Showing 5 of 2 Page 1 of 1