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

Products Industries	Customers Learning Support Company Salesforce+ Q Search Help	📞 💄 Login
Help Home Product Su	ipport ✓ My Cases	Contact Support
	Description	
	If Connector V2 is stuck as 'Verification in Progress' and cannot be unpaused, 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".	
	Resolution	
	Ensure the following steps have been completed in your Salesforce account:	
	 Latest version of the Account Engagement AppExchange package is installed in Salesforce. You can check the version: Navigate to Setup > Installed Packages. 	
	2. Check Account Engagement's version and make sure it's the last one.	
	- B2BMA Integration user (Salesforce user with username b2bmaintegration@ <org-id>.ext) has been assigned the Account Engagement Integration User permission set.</org-id>	
	 The b2bmaintegration package is installed correctly - for production the Namespace Prefix is b2bma, while for Sandbox it is pi3. If no package is installed or the incorrect one is installed, instructions to uninstall/reinstall can be found below, and vary depending on if you're in a production or a sandbox environment: 	
	For Production b2bmaintegration package reinstalls: https://salesforce.quip.com/cdDwAk255wfy For Sandbox b2bmaintegration package reinstalls: https://salesforce.quip.com/KSYtA4f97QNW	
	- Check that the app: Pardot_to_SF_Integration_Secure_Connected_App have the "Admin Approved Users are pre-authorized" for the Permitted Users onpion and not "All users may self-authorize": 1. Go to Secure J. Marsec. Connected Appr.	
	2. Go to Pardot_to_SF_Integration_Secure_Connected_App	

3. Select "Production Environments"



Login with your credentials → Select the option "Install for Admins Only" → click the "Install" button.

By Sal	all Pardot			
Install for	R r Admins Only	Install for All Users		Install for Specific Profiles
				Install
App Name	Publisher	Version Name		Version Number
Pardot	Salesforce	Pardot Package v	4.94	4.94
Additional Details	View Components			

5. Select check same as below screenshot \rightarrow Click on "Continue"

Ins By St	tall Pardot lesforce		
		121 4	22
	Approve	Third-Party Access	· ·
	This package may send or receive data from What if you are unsure?	n third-party websites. Make sure you trust these webs	ites.
	Website	SSL Encrypted	
App Name	pi.demo.pardot.com		ber
	pi.pardot.com		-
Additional Detail	storage.pardot.com	V	
	Yes, grant a	ccess to these third-party web sites	
	Cor	tinue Cancel	

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.

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Setup Home Object	Manager 🗸		1 XXXXXX 10000 - 1111					
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Account Engagement								
Didn't find what you're looking for? Try using Global Search.	Assign Business Unit Admin for Setup 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.							
	Business Unit Name Kitaracloud Techlabs	Business Unit ID 0Uv5g000000L0EqCAK	Account Status Enabled 	 Setup Admin Hitesh Patel 	Manage Users			
					Cancel Save			

 Go to Setup → Quick find → Search for "Setup Assistant" → Go to "Beyond basics" Section → Enable "Account Engagement" Lightning App

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Setup Home Object Manager 🗸						
Q. Setup assistant						
Service Setup Assistant	Beyond the Basics					
✓ Sales	uo bejond ure basics and implemente a more compretensive set or resources.					
✓ Inbox Setup Assistant	We recommended granting access to admins only. Te	ell Me More		Inst	all	
 Account Engagement Setup Assistant 	Manage Business Units and Assign Admins					
Didn't find what you're looking for? Try using Global Search.	A Salesforce admin must enable new Account Engagement Business Units and appoint an admin. If you have multiple business View Guide Tr View Guide Tr	ake the Trail		Mana	ge	
	Turn on Account Engagement Lightning App Glebal Setting					
	Let users work with Account Engagement from Salesforce. Account Engagement Lightning App is available only to admins until you configure permissions for users.	View Guide		On		ľ
	Manage users from Salesforce					L
	Watch how to configure Salesforce User Sync to easily manage all of your users from one place. For new Salesforce accounts, create users to assign to Account Engagement.	Vatch Video		Mana	ge	l
	Set Up Lightning Experience Email Builder (News)					
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8. Now, "Account Engagement" app should be visible in your app launcher.

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Setup Home Object Manager V		
Q. Account Engagement		
Sr Apps	to Beyond the Basics	1
Items	Go beyond the basics and implement a more comprehensive set of reatures.	
Account Engagement Campaigns	Install the AppExchange Application Global Setting	
Account Engagement Email Account Engagement Reports	We recommended granting access to admins only.	Install
Account Engagement Settings		
View All	Manage Business Units and Assign Admins	
Didn't find what you're looking for? Try using Global Search.	A Salesforce admin must enable new Account Engagement Business Units and appoint an admin. If you have multiple business View Guide Take the Trail units, appoint an admin to each unit.	Manage
	Turn on Account Engagement Lightning App Global Setting	
	Let users work with Account Engagement from Salesforce. Account Engagement Lightning App is available only to admins until you configure view Guide permissions for users.	Cn Cn
	Manage users from Salesforce	
	Watch how to configure Salesforce User Sync to easily manage all of your users from one place. For new Salesforce accounts, create users to assign to Account Engagement.	Manage
	Set Up Lightning Experience Email Builder Newt	
	Gius searcances in the new dran.and-dran email editor Tell Me More Tell Me More	Set Up

9. Navigate to "Account Engagement" from App Launcher.

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Dashboard	igement Dashboard Prospe	cts Campaigns 🗸 Automation	is Account Engagement Email Co	ntent Account Engagement Reports	Reports V Account Engagement Set	ings • Environment Hub 🗸 🗙	* Recently Viewed 🔍 🗙	
			11. 11. 11. 11. 12. 12.					
Action Requ	iired: Verify domains yo	ou use to send emails						×
Your business unit ha	is an unverified sending domain or doe	sn't have any verified sending domain	s. To avoid an interruption in email sen	ling, verify each domain. Learn how in S	Salesforce Help or review this Knowledge Artic	le for more details on this change.		
		A Prospect and custom object syn	c has been paused since Mar 10, 2024	a 11:47 PM PDT. If sync is paused for n	nore than 30 days, you'll need to do a full sy	nc to get all updates.		$\langle X X \rangle$
All Prospects								
Last Week 🗸	2am ED1):							
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							Conversions	0
							Opportunities Created	0
							All Prospects	0
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Marketing Calen	dar						Create	New Event
SUN	MON	TUE	WE	D	THU	FRI	SAT	
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10. Go to "Account Engagement Settings" → Select "User" under "User Management" → Click the "Add User" button.

Account Engageme	Q, Search 🐀 🛛 📾 🛜 ent. Dashboard Prospects Campaigns V Automations Account Engagement Reports Reports V Account Engagement Settings	* * 👼
Account Settings Optimizer	Users V	/lew Queues
> Automation Settings > Object and Field Configuration	View: User Roles: Filter: All Users V All Users V Tage	Tools 🕶
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Imports		
Recycle Bin		
Security		
System Emails		
V User Management		
Users		
Groups		
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Editing Sessions		

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

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Account Engageme	ent Dashbaurd Prospects Campaigns v Automations Account Engagement Email Content Account Engagement Reports Papers v Account Engagement Settings Hitesh Patel	Edit user Edit preferences Edit groups V
> Automation Settings	Contents	
Configuration	Email hitesh pahe@kitaracioud.com Role Administrator	
Domain Management	RistName Hitesh	
Exports	Job Title Broos	
Imports Recycle Bin	URL	
Security	Locale Targilish (United States)	
System Emails	CRI Userrame hitesh patel@kitacidu.com.pather .	
Users Groups	Activities User is currently syncing with the Law.	
Roles Editing Sessions	kennear hotoce, Usage Assigned Linnis, Dushande Sare Email Compliance Assigned	
contra accelerate	Critical Incidents Assigned Product Updates Assigned	
	Requiring User Action Sales Emails and Alerts Assigned	
	Created At Mar 10, 2024 11.42 PM	

12. Go to "**Setup**" → Search for "User" in Quick Find → Select the "**User**" corresponding user which we created in Account Engagement.

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Users Vuser Interface	Action Full Name * IEdit Chatter Excert Edit Integration 828MA	Chatter b2bmausr	Username chattiv.00059000005frozzead.megyxtbvhby/2,@chatter.salesforce.com b2temaintegration@dbldd00000fsrozead.ext	Last Login Role Active Profile Chatter Free Use 3/11/2024, 5:04 AM Streptstin EXEMA Integration	tr on User
Action Link Templates	Edit Patel Hitesh	HPate Allser	hitesh.patel@kitaracioud.com.partner	3/11/2024, 4:04 AM System Administ	rator
Actions & Recommendations			[New User] [Reset Password(s)] Add Multiple Users		
upp meio Custom Labels Density Settings ✓ Global Actions Global Actions				A 8 0 8 7 0 4 J K L 4 4 0 7 0 8 7	2 V W X Y Z Other All
Lightning App Builder Lightning Extension Loaded Console Tab Limit					
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13. Assign "Account Engagement User" Permission set to the user.

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Setup Home Object N	fanager 🗸				
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Roles	Del Account Engagement User		3/10/2024		
User Management Settings	Del Account Engagement Integration User		3/10/2024		M
liters	Dei DevOps Center Manager		2/9/2023		
- CARS	Show 4 more x Go to list (9) x				
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Action Link Templates	Department		Flow User		
Actions & Recommendations	Division		Service Cloud User		
Ann Monu	Address	IN	Mobile Push Registrations	View	
App Melia	Time Zone	(GMT-07:00) Pacine Dayight Time (America/Los_Angeles)	Accessioney mode (classic Unity)		
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Density Settings	Delegated Approver	al righteen	Load Lightning Pages While Scrolling		
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	Receive Approval Request Emails	Only if I am an approver	Make Setup My Default Landing Page		
Global Actions	Federation ID		Quick Access Menu	1	
Publisher Layouts	App Registration: One-Time Password Authenticator	[Connect]	Development Mode		
Lightning App Builder	App Registration: Salesforce Authenticator	(Disconnect)	Show View State in Development Mode		
Lightning Extension	Security Key (U2F or WebAuthn)	1	Cache Diagnostics		
Lightning Extension	Lightning Login	(Enroll	Allow Forecasting		
Loaded Console Tab Limit	Temporary Verification Code (Expires in 1 to 24 Hours)	[Generate]	Checkout Enabled		
Path Settings			No MRU Updates		

14. Go to Setup \rightarrow Search for "App Manager" in Quick Find.

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	1	00D2w00000JbINh Service Provider			12/21/2022, 11:22 PM	Classic		· ^
	2	2G Package Manager	SecondGenerationPackageManag	Second Generation Package Manager	1/16/2024, 2:16 AM	Lightning (Managed)	~	
	3	Account Engagement	PardotAppV1	828 Marketing Automation	3/10/2024, 11:29 PM	Lightning	~	
	4	All Tabs	AllTabSet		9/1/2022, 6:40 AM	Classic		
	5	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)		·
	6	App Launcher	AppLauncher	App Launcher tabs	9/1/2022, 6:40 AM	Classic	~	
	7	b2bma_canvas	b2bma_canvas	We want and a second build and all the second frequences in the second second	3/8/2024, 7:58 AM	Connected (Managed)		
	8	Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	9/1/2022, 6:40 AM	Lightning	~	
	9	Checkout Management App	Checkout_Management_App		9/27/2023, 10:26 PM	Classic (Managed)	~	
	10	Community	Community	Salesforce CRM Communities	9/1/2022, 6:40 AM	Classic	~	<u> </u>
	11	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)		
	12	Dataloader Partner	Dataloader_Partner	The Data Loader is an easy to use graphical tool that helps you to get your data into Salestorce objects.	7/27/2023, 6:57 AM	Connected (Managed)		
	13	DevOps Center	DevOps_Center		2/7/2023, 4:32 AM	Connected	~	
	14	DevOps Centers	DevOps_Centers		2/7/2023, 11:37 PM	Connected	~	v
	15	Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	9/1/2022, 6:40 AM	Lightning	~	v
	16	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		•
	17	Environment Hub	HUB_zuxwfe4jrd5pfephvn46	The Environment Hub lets you view, connect to, and access all your organizations from one location.	9/1/2022, 6:44 AM	Connected		v
	18	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)		•
	19	Goldcast	Goldcast	Goldcast Application	12/19/2023, 11:55 PM	Lightning (Managed)	~	v v

15. From App Manager click on the dropdown next to "**b2bma_canvas**" App → Select "**Manage**".

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Setup Home Object M	lanager 🗸	/						
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	5	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)		v
	6	App Launcher	AppLauncher	App Launcher tabs	9/1/2022, 6:40 AM	Classic	~	Y
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	8	Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	9/1/2022, 6:40 AM	Lightning	Manage	
	9	Checkout Management App	Checkout_Management_App		9/27/2023, 10:26 PM	Classic (Managed)	÷	-
	10	Community	Community	Salesforce CRM Communities	9/1/2022, 6:40 AM	Classic	~	Y
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	12	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)		•
	13	DevOps Center	DevOps_Center		2/7/2023, 4:32 AM	Connected	~	•
	14	DevOps Centers	DevOps_Centers		2/7/2023, 11:37 PM	Connected	\checkmark	V
	15	Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	9/1/2022, 6:40 AM	Lightning	~	v
	16	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		•
	17	Environment Hub	HUB_zuxwfe4jrd5pfephvn46	The Environment Hub lets you view, connect to, and access all your organizations from one location.	9/1/2022, 6:44 AM	Connected		•
	18	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)		V

16. Scroll down to "**Profiles**" Section \rightarrow Click the "**Manage Profiles**" button & add the "**Profile**" of the User to whom you want to enable the Account Engagement.

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Setup Home Object	tanager 🗸							
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App Manager	Access custom permissions							
Didn't find what you're looking for? Try using Global Search.	A statisfy user calls as a rise formation Manage user data via 2Pts							
	Session Policies Timeor Value							
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17. Add Salesforce Connector \rightarrow Go to "Account Engagement" app \rightarrow Click on "Account Engagement Settings" Tab \rightarrow Click on "Connectors"

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Account Engageme	Ent Dashboard Prospects	Campaigns 🗸 Automat	ions Account Engagement Em	al Content Account Engagement Reports Reports V Account Engagem	eent Settings	111 - 777 - 531 (STA)	, 			
Automation Settings Object and Field Configuration	Prospect and custom object sync has been paused since Mar 10, 2024 11.47 PM PDT If sync is paused for more than 30 days, you'll need to do a full sync to get all updates									
Connectors Domain Management	WARNING: Your connect	tor user doesn't have the recom	B2B Marketing Ar	naytics isn't syncing. <u>Beassign the permissions</u> and then check your apps for upda affect how Account Engagement data syncs with Salesforce. For full functionality.	tes. Learn More in Help ask your Salesforce admin to grant the connector	user all the recommended permi	ssions. ×			
External Action Errors Exports		Teach me how in Salesfor	<u>ce Help</u> . If this is intentional, you	I may dismiss this message, but exercise caution. Restrictions imposed on the con- View missing expected Salesforce permissions for your connector user To know how to fix this, refer to <u>this knowledge</u>	rector user affect your entire Account Engagemen	it instance.				
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Security	Salesforce.com	CRM	salesforce com	b2bmaintegration@00d%g00000ffrozead.ext	Paused	Mar 10, 2024 11:42 PM	ACTIONS			
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V User Management Users Groups						Showing 5 🗸 of 2	Page 1 of 1			
Roles Editing Sessions										

18. In Salesforce Connector Status in "Paused"

Account Engagem	ent Dashboard Prospects	s Campaigns 🗸 Automat	Q Searc	h al Content Account Engagement Reports V Account Engageme	nt Settings	★▼ ■ @ ?	\$. III (1990) \$
Account Settings Optimizer	Connectors	2111 ////					
> Automation Settings		Prospect	and custom object sync has bee	n paused since Mar 10, 2024 11:47 PM PDT. If sync is paused for more than 30 days	you'll need to do a full sync to get all updates.	a a a	
Configuration			B2B Marketing Ar	salytics isn't syncing. Reassign the permissions and then check your apps for update	s. <u>Learn More in Help</u>		
Connectors	WARNING: Your connect	tor user doesn't have the recom	mended permissions, which can	affect how Account Engagement data syncs with Salesforce. For full functionality as	k your Salesforce admin to grant the connector	user all the recommended perm	issions. *
External Action Errors		Teach me how in Salesfor	ce Help. If this is intentional, you	may dismiss this message, but exercise caution. Restrictions imposed on the conne View missing expected Salesforce permissions for your connector user	ctor user affect your entire Account Engagemen	it instance.	
Exports				To know how to fix this, refer to this knowledge			
Imports						+4	dd Connector
Recycle Bin Security	NAME	CATEGORY	VENDOR	USERNAME	STATUS	UPDATED O	ACTIONS
System Emails	Salesforce.com	CRM	salesforce.com 🤛	b2bmaintegration@00d5g00000fdrozead.ext	Paused	Mar 10, 2024 11:42 PM	0
✓ User Management	LinkedIn	Social Media	LinkedIn in		R	Mar 10, 2024 11:42 PM	0
Users						Showing 5 V of 2	Page 1 of 1
Groups							
Editing Sessions							

19. Go to Actions \rightarrow Click on "Resume Sync"

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Account Engagen	nent Dashboard Prospect	ts Campaigns 🗸 Automa	tions Account Engagement Email	Content Account Engagement Reports Reports V Account Engagement Se	ettings		
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nectors			B28 Marketing Anal	ytics isn't syncing. <u>Reassign the permissions</u> and then check your apps for updates. <u>Le</u>	earn More in Help		
ain Management	WARNING: Your conne	ctor user doesn't have the recor	nmended permissions, which can at	ffect how Account Engagement data syncs with Salesforce. For full functionality, ask yo	ur Salesforce admin to grant the connect	tor user all the recommended per	missions.
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its						_	
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20. In Salesforce Connector status is "verified".

