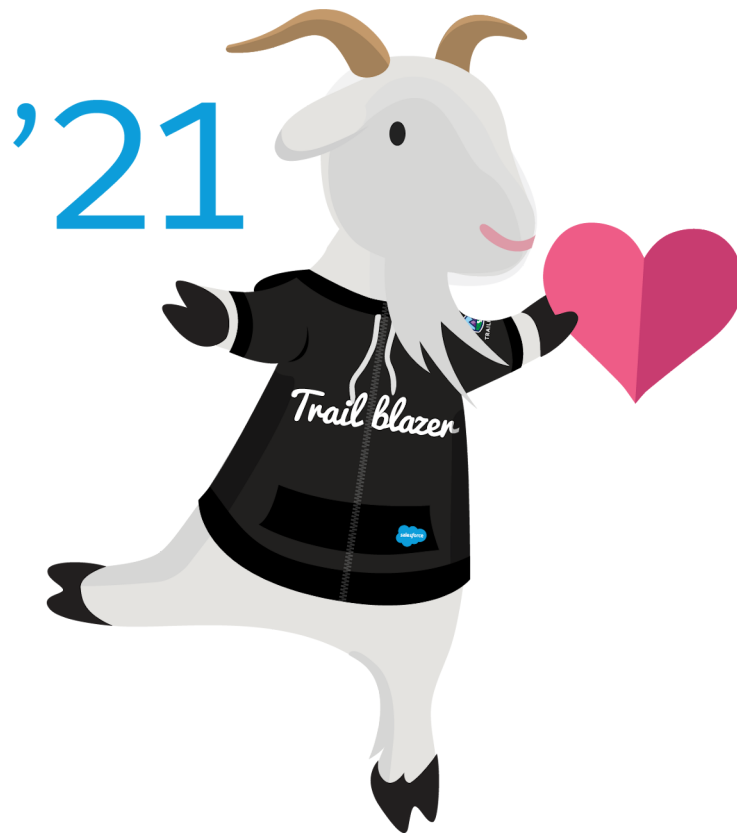




Pardot Business Units Implementation Guide

Salesforce, Summer '21



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GETTING STARTED WITH PARDOT BUSINESS UNITS

Your enterprise marketing goals are based on variety of criteria, such as geography and product lines. Pardot Business Units help each division within your company focus on their unique marketing needs. Prospects and marketing assets are separated by business unit, so your divisions can market independently.

Pardot Business Units help you tailor and report on the effectiveness of your marketing.

- Use Marketing Data Sharing to control which records sync between Pardot and Salesforce.
- Provision new business units from Salesforce using the Pardot Setup Assistant.
- Get a unified view of your business units with B2B Marketing Analytics.

This guide walks you through implementing Pardot Business units.

[Business Unit Basics](#)

Before you get started with Pardot Business units, learn how they work and interact with your data. To make your implementation a breeze, carefully review the following information.

[Business Unit Switcher](#)

Some users, such as Pardot admins and marketing managers, can switch between business units to manage assets, records, and settings.

[Implementation Planning Worksheet](#)

To make your Pardot Business Unit implementation as efficient as possible, print and use this worksheet to decide how to handle each task for your implementation. Engage with stakeholders from across your business, such as the admin in charge of reporting, marketing directors, and sales leadership.

EDITIONS

Available in: Accounts that purchased or upgraded to Pardot **Advanced** and **Premium** Editions after February 11, 2019, and have Salesforce Enterprise Edition or higher

Business Unit Basics

Before you get started with Pardot Business units, learn how they work and interact with your data. To make your implementation a breeze, carefully review the following information.

Architecture Basics

Pardot Business Units connect to a single Salesforce org, but each unit is its own partitioned Pardot database. Business units don't have a hierarchical relationship. To see a global view of your data, combine datasets from each business unit in B2B Marketing Analytics.

Each business unit has its own:

- Salesforce connector
- Prospects
- Marketing assets*
- Segmentations and automations
- Settings and configurations

* Assets created in a Lightning Builder can be shared across business units.

Considerations for Setting Up Pardot Business Units

There are several important things to understand about business units.

Partner Assistance

The Pardot Business Units setup process is simple. However, configuration choices can have a widespread impact. The most successful implementations are done with the guidance of a Pardot and Sales Cloud certified partner. For help with finding a partner to work with, contact the [Pardot Partner team](#).

Feature Availability

Business units are available to accounts that purchased or upgraded to Pardot Advanced or Premium Edition after February 11, 2019. You also need Salesforce Enterprise Edition or higher. Lower Salesforce editions can incur API data charges.

Some Pardot Business Units features, such as Marketing Data Sharing and the Business Unit switcher, are available only in the Pardot Lightning app. To access the Pardot Lightning app, users need a Sales, Service, or CRM license.

Data Visibility

Pardot and Salesforce have their own data authorization and sharing models. The Salesforce data that's available to users in the Pardot Lightning app is determined by their Salesforce permissions. The Pardot data that users see in Salesforce is determined by their business unit. For example, let's say you have two business units, North America and Europe, and a user has access only to the North America business unit. The user's Salesforce permissions gives access to all Salesforce leads, but they have access only to the prospects in the North America business unit.

Control What Syncs to Business Units

You can control which objects, users, and data sync to each business unit. The method you use depends on the data you want to control.

To Control	Use
Lead, contact, opportunity, and custom object syncing	Marketing Data Sharing (recommended), or organization-wide defaults and sharing rules
Which users belong to a business unit	Salesforce User Sync and assign users to business units by public group membership, by role, or individually
Which connected campaigns sync to a business unit	Campaign record types when configuring connected campaigns

Asset and Prospect Activity Strategy

Pardot assets and prospect activity can't be moved between business units. To avoid re-creating marketing assets or losing valuable prospect activity data, carefully plan your strategy before you begin implementation. Content created in a Lightning Builder can be shared across business units.

Salesforce Orgs and Pardot Business Units

Pardot Business Units connect multiple business units to a single Salesforce org. Business units provisioned from separate Salesforce orgs aren't connected, and share no global features. If your company plans on consolidating multiple Salesforce orgs, we recommend consolidating them before you implement Pardot Business Units.

Salesforce Connector and Syncing

When you provision a business unit, the Salesforce connector is created in a paused state. While the connector is paused, prospects and their related custom object records don't sync between Pardot and Salesforce, unless manually synced. Users configured with User Sync continue to sync while the connector is paused.

 **Warning:** Don't unpause the connector until after you set up Marketing Data Sharing criteria. Otherwise, data can end up in the wrong business unit.

Leads and Contacts Across Business Units

A lead or contact syncs to a prospect in a single business unit by default because they have a one-to-one relationship. Connecting a lead or contact to prospects in multiple business units creates data conflicts that impact your overall sync performance. To sync leads or contacts to multiple business units, you have two options.

- Use the default configuration and maintain duplicate lead or contact records in Salesforce. This option maintains a one-to-one relationship between lead or contact records and one Pardot business unit.
- Edit the Salesforce-Pardot connector for each business unit and select the option to stop syncing Pardot package fields. Then, reconfigure Marketing Data Sharing to let leads and contacts sync to multiple business units. With this option, Pardot package fields such as score and grade don't sync. If you need that data on your lead and contact records, work with a partner to develop a custom data flow using the [Pardot bulk export API](#). For help with finding a partner to work with, contact the [Pardot Partner team](#).

 **Note:** If you build a custom data flow, make sure only one Pardot business unit is set as the source of truth for any given field.

Records related to leads or contacts, such as accounts, opportunities, and custom objects, can exist in more than one business unit.

Marketing Data Sharing

Marketing Data Sharing allows you to easily route CRM records to the corresponding business unit based on the records' Salesforce field values. We recommend that you create a custom field such as `Pardot_Business_Unit__c` on each object (Lead, Contact, Opportunity, and custom objects).

For more details, see [Configure Marketing Data Sharing Rules](#) on page 7.


Connected Campaigns

To prevent data conflicts, associate your Salesforce campaigns with a single business unit. Campaigns are connected based on record type, so choose a different record type for each business unit during Connected Campaign configuration.

For more details, see [Connect Pardot Campaigns to Salesforce Campaigns](#) in Salesforce Help.

Tracker Domains

Tracker domains must be unique across your business units. As long as your subdomains are different, your root domains can be the same.

 **Example:** You have two business units and two subdomains. Use `ww1.example-domain.com` in the first business unit, and `ww2.example-domain.com` in the second business unit.

Email Sending Domains

You can set up business units to share email sending domains, or use unique domains. To use the same sending domain with more than one business unit, contact Salesforce Support.

Email Sending IP Addresses

If you're using a shared IP address, we can't guarantee that each business unit is on the same IP address. Dedicated IP addresses can't be shared between business units. If you decide to use dedicated IPs for each of your business units, you must maintain each IP address independently. See [Warning a Dedicated IP Address](#) in Salesforce Help.

Salesforce Engage

Pardot Business Units support all features of Salesforce Engage except for mobile features, and the Outlook and Gmail plugins.

Mobile

Pardot Business Units don't support any of Pardot's mobile features.

Einstein for Pardot

Pardot Business Units support Einstein for Pardot, including Einstein Lead Scoring and Behavior Scoring and Campaign Insights.

For more details, see [Pardot Einstein: Scoring and Insights](#) in Salesforce Help.

Business Unit Switcher

Some users, such as Pardot admins and marketing managers, can switch between business units to manage assets, records, and settings.

To switch between business units, users must have:

- User Sync enabled and a verified Salesforce v2 connector.
- Access to the Pardot Lightning app.
- A user record in multiple business units, all connected to the same Salesforce org. Each Pardot user record must be connected to the same Salesforce user.

What's Affected By the Business Unit Switcher

When you switch between business units, Pardot components show the data and assets from only your current business unit. Pages without Pardot components, such as a campaign list view, aren't affected when you switch business units.

The Pardot Lightning app pages show only the records and assets from only the current business unit. For example, the Prospects page shows only the prospect records associated with the current business unit. On Leads, Contacts, Campaigns, and Reports pages, switching business units affects only the Pardot Visualforce pages and Lightning Actions and components on those pages.

If your page layouts include Visualforce pages or Lightning Actions from the Pardot managed package, pages show and interact with data from only the current business unit.

- The following lead and contact Visualforce pages show only the activities and lists associated with the current business unit.
 - AddToPardotList
 - EngageCampaignsContactRecord
 - EngageCampaignsLeadRecord
 - Marketing Action Summary Contact
 - Marketing Action Summary Lead
 - Pardot Activities
 - Pardot List Membership
 - Pardot Social Data
 - SendPardotEmailContact
 - SendPardotEmailLead
- The following Lightning Actions and components show and interact with only the data associated with the current business unit.
 - Send Engage Email (shows only the templates associated with the current business unit)
 - Add to Nurture Lightning (shows only the lists associated with the current business unit)
 - Send to Pardot (sends leads and contacts to the current business unit)
 - Send Pardot Email (shows only the templates associated with the current business unit)
 - Engagement History related lists and Lightning component (shows only the activities associated with the current business unit)

Implementation Planning Worksheet

To make your Pardot Business Unit implementation as efficient as possible, print and use this worksheet to decide how to handle each task for your implementation. Engage with stakeholders from across your business, such as the admin in charge of reporting, marketing directors, and sales leadership.

Task	Owner	Notes
Engage with a Pardot and Sales Cloud partner.		
Identify existing Pardot accounts and audit for edition & feature adoption. (Optional)		
Choose what to base your business units on—such as geography, divisions, product lines, or acquisitions.		
Decide how many business units you need initially.		
Decide how many business units you need later.		
Decide how many prospects you need across all business units.		
List which user to appoint as the admin for each business unit.		
List which users need access to which business units.		
Decide which Salesforce fields you want in each business unit.		
Decide which custom objects you want in each business unit.		
Outline criteria for Marketing Data Sharing rules, which control what Salesforce data syncs to each business unit.		
List the tracker domains you want to use with each business unit.		
Create a plan to aggregate datasets from each business unit for global reporting.		

CREATE AND CONFIGURE BUSINESS UNITS

A Salesforce admin uses the Pardot Setup Assistant to create business units and assign admins. Then, the new business unit admin completes setup and configuration tasks from the Pardot Lightning app.

Create a Business Unit

Before users can jump in and start marketing, a Salesforce admin must create a business unit and appoint an admin to activate it. The Pardot Setup Assistant makes it easy to create business units.

Configure a Business Unit

When a Salesforce admin creates a business unit and appoints a user as the admin, the user gets an email notification with setup information. Business unit admins add users, configure Marketing Data Sharing rules, and configure Pardot before unpausing the Salesforce-Pardot connector to begin data syncing.

Create a Business Unit

Before users can jump in and start marketing, a Salesforce admin must create a business unit and appoint an admin to activate it. The Pardot Setup Assistant makes it easy to create business units.

The company name field in Pardot account settings acts as the source of truth for a given business unit name. If a conflict exists, the company name field overwrites the business unit name in Salesforce Setup.

1. From Marketing Setup, enter *Account* in the Quick Find box, and then select **Pardot Account Setup**.
2. Enter a name for the business unit.
3. Choose an admin for the business unit. The admin is responsible for activating the business unit and adding users.
4. Save the business unit.

After you save the business unit, we send the appointed admin a welcome email to guide them through the activation process. After activation, the admin can give other users the Administrator role from the Users page in the Pardot Settings tab.

The original provisioning admin listed on the Pardot Account page is read-only and can't be changed.

USER PERMISSIONS


To create business units:

- Customize Application and Modify All Data

Configure a Business Unit

When a Salesforce admin creates a business unit and appoints a user as the admin, the user gets an email notification with setup information. Business unit admins add users, configure Marketing Data Sharing rules, and configure Pardot before unpausing the Salesforce-Pardot connector to begin data syncing.


Before you begin, make sure that your Salesforce admin enabled the Pardot Lightning app and that you have access. For more details, see [Give Users Access to the Pardot Lightning App](#) in Salesforce Help.

-  **Warning:** Don't unpause the connector until you've configured Marketing Data Sharing rules. Unpausing before you finish configuring rules can cause data to sync to the wrong business units.

USER PERMISSIONS

To configure a business unit:

- Pardot Administrator role and access to the Pardot Lightning app

 **Note:** This implementation guide covers only the setup tasks related to Pardot Business Units. For all the steps to get Pardot fully configured, check out the [Pardot Implementation Guide \(PDF\)](#).

User Management

Configure Salesforce User Sync to create and manage Pardot access from Salesforce. User Sync is automatically enabled in all accounts created in Summer '20 and later.

Configure Marketing Data Sharing Rules

A Pardot admin can set up Marketing Data Sharing rules to sync a subset of leads, contacts, opportunities, and custom objects.

User Management

Configure Salesforce User Sync to create and manage Pardot access from Salesforce. User Sync is automatically enabled in all accounts created in Summer '20 and later.

Salesforce User Sync lets Pardot admins choose which users are synced to a Pardot account or business unit. We recommend you create a public group for each business unit. Then, assign users to Pardot based on business unit group membership when you set up. If you're using Connector v2, users sync without unpausing the connector.


If your account was created Summer '20 or later, and you don't want to manage users in Salesforce, create users in Pardot. Then manually map them to Salesforce users, and set up Salesforce single sign-on (SSO).

SEE ALSO:


[Connect Pardot and Salesforce Users](#)

Configure Marketing Data Sharing Rules

A Pardot admin can set up Marketing Data Sharing rules to sync a subset of leads, contacts, opportunities, and custom objects.

1. In the Lightning app, select **Pardot Settings**, and then **Connectors**. Click  next to the Salesforce connector, and select **Edit Settings**. Select **Marketing Data Sharing**.
2. Open a rule for editing.
3. Configure the rule.
 - Each object can have only one rule. Each rule can be based on one Salesforce field and uses the equals operator.
 - Rules can be based only on Salesforce fields that aren't mapped to a Pardot field. The field must belong to the rule's object and the connector user must have read and edit access to it. If needed, change the field-level security to give the connector user access to the field.
 - The **Default** setting for an object uses the connector user's permissions to control which records sync. When you create a rule for an object, rule, both the rule and the connector user's permissions control which records sync.
4. Save the rule.

When an object has a rule, the details appear in the Criteria column on the Marketing Data Sharing tab.

 **Example:** If you want to sync only the leads in Europe, create a rule on the lead object based on the "region" custom field. Your criteria is `region__c= Europe`.

EDITIONS

Available in: The Pardot Lightning app in Pardot **Advanced** Edition purchased or upgraded after February 12, 2019

USER PERMISSIONS

To configure Marketing Data Sharing rules:

- Pardot Administrator role


If you use Marketing Data Sharing rules for leads or contacts, criteria must be created for both leads and contacts. If you have multiple business units, you must add criteria for both leads and contacts in each business unit.


SET UP B2BMA FOR BUSINESS UNITS

Gain deeper insight into your business unit's performance in Tableau CRM Analytics Studio's B2B Marketing Analytics. For each business unit, create a B2B Marketing Analytics app that presents datasets of Pardot and Sales or Service Cloud data in easy-to-read dashboards.

Before you get started, keep these points in mind.

- Each business unit can have only one associated B2B Marketing Analytics app.
- To use B2B Marketing Analytics with multiple business units, you need a Tableau CRM Growth or Plus user license. These licenses support the data volume and offer global, customizable views into your data.
- Creating an aggregated view of your data is a manual process outside of Salesforce Support's scope. We recommend that you work with a [partner with Tableau CRM certifications](#) to set up this part of your integration.

 **Note:** To complete setup, you need your business unit's Pardot account ID. You can find the ID in the Pardot Lightning app, under Account Settings on the Pardot Settings tab.

1. In Salesforce, from the App Launcher (), find and open **Tableau CRM Analytics Studio**.
2. Click **Create** and select **App**.
3. Click **Start from Template** and then select **B2B Marketing Analytics**.

The app called B2B Marketing Analytics Legacy is no longer supported. Click through to the Details page, and verify that Version 2.0 appears in the sidebar.

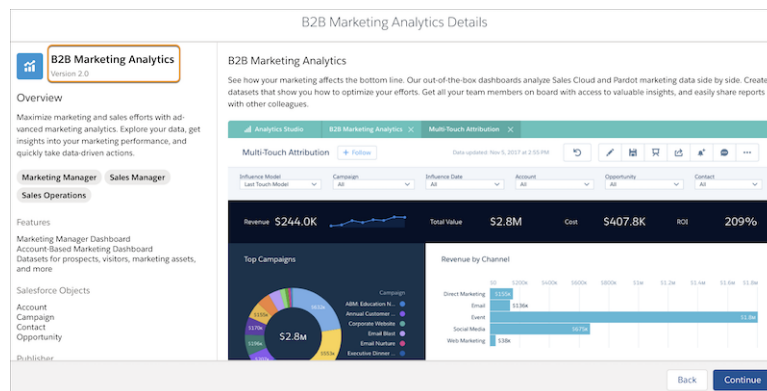
USER PERMISSIONS

To create a B2B Marketing Analytics app:

- Manage Tableau CRM Templated Apps AND Create B2B Marketing Analytics Apps OR B2B Marketing Analytics permission set

To use B2B Marketing Analytics

- Use Tableau CRM Templated Apps AND Create B2B Marketing Analytics Apps OR B2B Marketing Analytics permission set



4. Click **Next** and continue through setup.
5. Click **Done**.

 **Note:** During the setup process, choose whether to include optional dashboards and datasets.

Set Up B2BMA for Business Units

The setup process continues in the background. To see the status of your app, navigate to **Settings > Data Manager > Dataflow View** in Tableau CRM Analytics Studio.

SEE ALSO:

[Explore Data and Take Action with Tableau CRM](#)