Salesforce Engage Implementation Guide

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@salesforcedocs

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BEFORE YOU BEGIN

Before you set up Salesforce Engage, learn about API requirements and other considerations.

Considerations for Salesforce Engage Setup

Before setting up Salesforce Engage, keep these considerations in mind.

- Before you can set up Salesforce Engage, you must have a verified Salesforce-Pardot connector. For more information, see Connecting Pardot and Salesforce.
- Salesforce Engage is not supported for Salesforce sandbox accounts.
- Do not add legacy Custom Permissions for Pardot to your Salesforce profiles.
- To load all user variable tags when using Send on Behalf Of, create Pardot users for all account, lead, and contact owners that are used in a from address. Then link them to their CRM username.

Salesforce Engage API Permissions

Salesforce Engage requires some Pardot API permissions to function correctly. Assigning a Salesforce Engage permission set and license to a user grants these required permissions.

- Prospects—Create, query, and read prospects that are not assigned to them. If a user has read permission on a lead or contact in Salesforce, the user can perform actions on a corresponding prospect matched by:
  - Lead or contact ID if your account allows multiple prospects with the same email address.
  - Email if your account does not allow multiple prospects with the same email address.
- Email templates—View all templates marked for one-to-one emails (respects folder permissions).
- Lists—View and edit all (respects folder permissions).
- Drip Programs—View all (respects folder permissions). Drip Program names are displayed as list names in the Salesforce mobile app and Engage for Gmail.

SET UP SALESFORCE ENGAGE

Configure Salesforce Engage for your company. To complete setup, you need a Salesforce admin and a Pardot admin.

EDITIONS

Available in: All Pardot Editions with Salesforce **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions.

Linking Engage and Pardot Users

For users to access Salesforce Engage features within Salesforce, they must be linked to a Pardot user.

You can link users in a few ways.

- Enable Salesforce User Sync. See Manage Users with Salesforce User Sync.
- Map existing users individually. See Map Salesforce and Pardot Usernames.
- Create and map users individually. See Add Pardot Users. If you use this method, deselect the **Send Activation Email** option to keep Engage users from logging in to Pardot directly.
- Import and map users in bulk. Export the users you want to link from Salesforce, and keep only the First Name, Last Name, Username, and Email columns. Add a Role column, and choose user roles for each user. Import the users as SSO in Pardot. For instructions, see Import Users.

Assign Engage Licenses and Permission Sets

You can assign and unassign licenses and permission sets in bulk to your users who have Sales Cloud, Service Cloud, or CRM licenses.

USER PERMISSIONS

To assign permission set licenses:
- Manage Users

Note: Assigning a Salesforce Engage license and permission set automatically grants some Pardot API permissions to the users. See Salesforce Engage API Permissions.

1. Navigate to the **Salesforce Engage License Assignment** tab.

   Note: If you don't see the Salesforce Engage License Assignment tab, on the profile assigned to your admins, change the tab's setting to **Default On**.

2. From the Action Type dropdown, select **Assign**.
3. Select which users you want to assign Salesforce Engage permission sets and licenses, and click **Add License**.

Let Users Add Salesforce Files to Engage Emails

Enable Content Deliveries and Public Links to let your users upload and select Salesforce files from the Engage Campaign editor.

See Set Up Content Deliveries.

Configure Lead, Contact, and Account Pages

Configure page layouts so your users can send Engage emails and add leads and contacts to Pardot lists, right from the record pages.

Use the Add to Nurture Action in Page Layouts
With the Add to Nurture action, Engage users can add leads and contacts to marketing lists from lead, contact, and person account records.

Add Send Engage Email Button
With Engage Campaigns, users can send emails to leads, contacts, and campaign members. To use this feature, add the Send Engage Email button to your lead, contact, opportunity, and account search layouts and detail pages. You can also add the button to your campaign detail pages.

Use the Add to Nurture Action in Page Layouts

With the Add to Nurture action, Engage users can add leads and contacts to marketing lists from lead, contact, and person account records.

USER PERMISSIONS

To customize page layouts:
- Customize Application

Note: The Add to Nurture action isn't the preferred way to give reps the ability to add to marketing lists from Salesforce. We recommend using the Add to Engagement Studio Lists action in Salesforce for an easier experience for reps.

1. Open the page layout you want to add the action to. See Edit Page Layouts for Standard Objects.
2. From the Quick Actions section, drag **Add to Nurture List** to the Quick Actions in the Salesforce Classic Publisher section.
3. Save the page layout.

Add Send Engage Email Button

With Engage Campaigns, users can send emails to leads, contacts, and campaign members. To use this feature, add the Send Engage Email button to your lead, contact, opportunity, and account search layouts and detail pages. You can also add the button to your campaign detail pages.

USER PERMISSIONS

To customize page layouts:
- Customize Application

Note: If the Send Pardot Email button is on your page layout, remove it before adding the Send Engage Email button.

1. Add the Send Engage Email button to the lead, contact, campaign, opportunity, and account search layouts and detail pages for your Engage users. See Edit Page Layouts for Standard Objects. To add the button to Lightning Experience, drag it to the Salesforce Mobile and Lightning Experience Actions section.
2. Add the Send Engage Email button to the contacts related list on an account page layout.
   a. Edit the account page layout assigned to Engage users.
   b. Select **Related Lists**, and click the wrench icon in the Contacts section.
   c. Expand the Buttons section.
   d. From the Available Buttons list, click **Send Engage Emails**, and then click **Add**.

Configure Salesforce Engage Settings

Configure Engage Campaign sending limits, set a default template, choose a point of contact for email notifications about Salesforce Engage, and choose whether to respect a prospect's opted-out status when sending one-to-one emails.

Configure Product and Service Notifications for Salesforce Engage
Choose a user to receive important notifications about Salesforce Engage.

Edit Salesforce Engage Email Limits and Options
In your Pardot account settings, admins can set a campaign send limit, exclude opted out prospects from emails, turn off tracking for Gmail, and set a default template for Engage campaigns. These settings apply to all Engage users in your org.

Exclude Opted-Out Prospects from 1:1 Engage Emails
A Pardot admin can control whether users can send one-to-one Salesforce Engage emails to opted-out prospects.

Configure Product and Service Notifications for Salesforce Engage

Choose a user to receive important notifications about Salesforce Engage.

USER PERMISSIONS

To edit notification settings:
- Pardot Administrator role

1. Open the Account Settings page.
   - In Pardot, click and then select **Settings**.
   - In the Lightning app, select **Pardot Settings**.
2. Scroll to the Product and Services Notification section.
3. Next to Salesforce Engage, select a user from the dropdown.
4. Save your changes.

Edit Salesforce Engage Email Limits and Options

EDITIONS

All editions with Salesforce Engage

USER PERMISSIONS

To change the send limit:
- Pardot Administrator role

In your Pardot account settings, admins can set a campaign send limit, exclude opted out prospects from emails, turn off tracking for Gmail, and set a default template for Engage campaigns. These settings apply to all Engage users in your org.

1. Open the Account Settings page.
   - In Pardot, click and then select **Settings**.
   - In the Lightning app, select **Pardot Settings**.
2. Click **Salesforce Engage**.
3. Configure the Engage Campaign Limit and Email Options settings.

Setting	Description
Engage Campaign Limit	Limits the number of Engage Campaign emails an Engage user can send over a 24-hour period. Choose a number between zero and 500. 24-hour rollovers respect the user's timezone.
Exclude opted out prospects from 1:1 Engage emails sent from Salesforce	Prevents users from sending 1:1 emails to prospects who opted out of marketing emails.
Prevent Engage for Gmail from tracking opens and clicks	Turns off Engage for Gmail's tracking functionality.

4. Save your changes.

Exclude Opted-Out Prospects from 1:1 Engage Emails

USER PERMISSIONS

To edit Salesforce Engage settings:
- Pardot Administrator role

A Pardot admin can control whether users can send one-to-one Salesforce Engage emails to opted-out prospects.

1. Edit your Pardot account settings.
2. Expand **Salesforce Engage**.
3. Select **Exclude opted-out prospects from 1:1 Engage emails sent from Salesforce**.
4. Save when finished.

Enable the Engage Sales Tools Page

The Engage Sales Tools Visualforce page gives users access to more Engage resources.

The page includes a few resources for users.

- Engage Alerts Desktop download links for macOS and Windows
- Engage for Gmail download link
- Link to Salesforce Engage documentation

- Links to Salesforce Engage training materials

Salesforce admins can decide how to make this page available to users. A few options include:

- Tab in the Salesforce Engage app
- Link in the sidebar
- Button within Engage Campaigns

Engage Team Reports

Sales managers, marketers, and admins can report on team Engage email usage and impact. View aggregated stats on emails that were sent via Engage Campaigns, Engage for Gmail, or Engage for Outlook. Drill in and compare stats for individual sales reps, and identify the top-performing templates by email opens and clicks.

Considerations for Using Engage Team Reports

When using Engage Team Reports, keep these considerations in mind.

- Your user role hierarchy in Salesforce determines what the My Team's Engage Sends filter shows. If your admin has changed sharing settings of custom objects in the Team Reports package, this filter doesn't work as expected.
- Editing or deleting reports in the Engage Reports folder breaks Engage Team reports. To customize a report, make a copy.
- You don't need an Engage license to use Team Reports.
- The Send Engage Email button works only for users with an Engage license.
- Reports data created from the team reports objects counts toward your data storage limits in Salesforce.
- The custom objects created in the Engage Team Reports package do not count toward your custom object limits for your Salesforce edition.
- The Engage Reports folder is set to private by default.
- We recommend that you assign the connector user the View Setup and Configuration permission. This permission makes it easier for our support team to troubleshoot issues.
- Template data includes only stats from Engage sends. It does not include data from other emails, such as list emails and engagement programs.
- For email unsubscribes and opt-outs, Engage Team Reports show the total number of times a prospect clicked unsubscribe or opt-out. This number can differ from Email Template Reports, which show a maximum of one unsubscribe or opt-out per prospect.

Set Up Team Reports

Install and configure Engage Team Reports to make them available to your users.

Note: If your account uses v2 of the Salesforce-Pardot connector, skip assigning the Engage Reports (Connector User) permission set in Step 2. The Engage Reports (Integration User) permission set is assigned to the B2BMA Integration user by default when you install the Engage Reports package.

1. Install the Engage Reports package.
   a. Download the Engage Reports package.
   b. Click **Install for Admins Only**, and click **Install**.
   c. When the package is finished installing, click **Done**.
2. Assign permissions sets. See Permission Sets if you need help with this step.
   - Assign the Engage Reports (Connector User) permission set to your Pardot connector user.
   - Assign the Engage Reports (End User) permission set to all users that view and run engage reports and all users that send Engage Campaigns.

   a. Navigate to the Engage Reports Permissions tab.
   b. Set the view to **Unassigned Users**.
   c. Assign permissions as needed.
3. Share the Engage Reports folder with any admins that need access to the reports.
   a. Navigate to Reports, and find Engage Reports.
   b. Hover over **Engage Reports**, and click the pin icon.
   c. Click **Share**, and choose the appropriate sharing settings on the next screen.
4. Add the Engage Team Reports tab to an app.

USER PERMISSIONS

To install packages:
- Download AppExchange Packages

To assign permission sets:
- Assign Permission Sets

To share report folders:
- Manage Reports in Public Folders

SET UP OPTIONAL FEATURES

Now that you've set up Salesforce Engage, consider giving your users access to Engage for Gmail or Outlook, and grant access to delegated sending.

Assign Send on Behalf of Permissions

USER PERMISSIONS

To enable custom permissions in profiles:

- Manage Profiles and Permission Sets

You can grant access to delegated sending in Engage Campaigns by assigning the appropriate custom permission.

- Enable the appropriate custom permission on the profile assigned to the Engage users you want to give delegated sending permissions. See Enable Custom Permissions in Profiles.
  - Send on Behalf of Another User in Engage Campaigns using Account Teams—Assign this permission to let users send as the contact or account owner if they are a member of the same account team.
  - Send on Behalf of Another User in Engage Campaigns—Assign this permission to let users send as the lead, contact, or account owner when they have write access to the lead, contact, or account they are emailing.

Engage for Gmail

Engage for Gmail is a Chrome extension that lets Salesforce Engage users send trackable emails directly from Gmail.

Considerations for Using Engage for Gmail

When using Engage for Gmail, keep these considerations in mind.

General

- To use Engage for Gmail, the Salesforce user's profile must have the API Enabled permission.
- Your Engage for Gmail session lasts as long your Salesforce session is set to persist in your Salesforce org's settings.

Sending Emails

- Emails sent with Engage for Gmail are sent through Google's email servers.
- When you send an Engage email to a recipient that isn't an existing lead or contact in Salesforce, you're prompted to create a lead or contact. The new record is synced to Pardot and creates a prospect.
- If a prospect is archived, you can't send the prospect an Engage for Gmail message, and the prospect's marketing actions aren't displayed.
- You can send to only one recipient at a time.
- You can't select a template until you enter the recipient's email address.

Tracking and Logging Emails

- If the Sync plug-in email setting is enabled on your connector, emails are logged to the lead or contact activity history with "Engage Gmail Email" prepended to the subject.
- If you have multiple prospects with the same email address, the extension prompts you to select which Salesforce record to track the email on.
- Engage for Gmail overwrites all pasted links with a tracked link URL and inserts an open tracker into the email body content.
- Email opens and clicks are tracked in Pardot.
- The Email Plug-in Campaign dropdown in Pardot Settings defines the campaign for your Engage for Gmail email sends. To avoid errors, don't archive the Email Plug-in Campaign.

Google and Chrome Extension Compatibility

- If you use other Gmail extensions, minimize them to use the Engage for Gmail side panel.
- The Engage for Gmail side panel isn't compatible with Gmail Lab features or some other Chrome extensions.
- Engage for Gmail is updated for Google's Scheduled Release track. If you're on Google's Rapid Release track, it's possible to experience issues until the extension is updated in line with the Standard Release track.
- If you want to use your Gmail signature with Engage email templates, in Chrome, navigate to **Extensions** > **Engage for Gmail** > **Options**. Select **Preserve Gmail Signature**.

Using Variable Tags and Merge Fields

- Engage for Gmail doesn't support View Online variable tags or merge fields.
- Prospect variable tags and merge fields populate in the email, but account variable tags and merge fields don't.
- Prospect variable tags and merge fields must be included in the template. You can't add variable tags or merge fields directly in Gmail.

Install the Engage for Gmail Extension

Install the Engage for Gmail Chrome extension to send Engage emails in Gmail.

To use Engage for Gmail, you must have a Salesforce Engage license, and the Salesforce user must be linked to a Pardot user.

1. On the Engage Sales Tool tab in Salesforce, click **Engage for Gmail**. Contact your admin if you don't have this tab.
2. To open Chrome's extension manager, go to chrome://extensions.
3. Locate the Engage extension, and click **Options**.
4. Click **Log in With Salesforce**.
5. If prompted, enter your Salesforce credentials.
6. Click **Allow**.

Send an Email with Engage for Gmail

Send tracked emails from Gmail with the Engage for Gmail extension.

1. In Gmail, compose an email.
2. Click the cloud icon in the compose menu.
3. Select **Track clicks and opens**.
4. (Optional) If you have multiple prospects with the same email address, select **use default email selection for this record**. This option tracks the email on the record that was previously selected.
5. In the To field, enter a lead or contact email address.
6. To use an email template, select **Use a Template**, and select a template.
7. When finished, send your email.

After you send a tracked email, you can view information about thread participants in the Engage for Gmail side panel. When you open the email thread, the side panel opens on-screen.

Engage for Outlook

Engage for Outlook lets Salesforce Engage users work from their inbox and track opens and sends on emails sent through Outlook.

To use Engage for Outlook, the Outlook integration must be enabled in your org, but it is supported for users on Salesforce Classic and Lightning Experience.

EDITIONS

Available with: Sales Cloud in Professional, Enterprise, Performance, and Unlimited Editions with Salesforce Engage

Considerations for Using Engage for Outlook

When using Engage for Outlook, keep these considerations in mind.

Set Up Engage for Outlook

Set up Engage for Outlook so that users can send and track emails from Outlook.

Considerations for Using Engage for Outlook

When using Engage for Outlook, keep these considerations in mind.

- Users need an Engage license to use Engage for Outlook.
- Engage for Outlook has the same system requirements as Outlook integration.
- If multiple recipients are copied on the same email, all email opens are attributed to the first recipient in the To field. The user can change who open tracking is associated with by selecting a different record in the People component.

- Engage for Outlook uses Salesforce email templates. Pardot templates are unavailable.
- For more accurate email open tracking, send one-to-one emails with Salesforce Engage Tracking. For more accurate one-to-many email tracking, send Engage Campaigns from Salesforce instead.
- To prevent tracking false email opens, Engage for Outlook doesn't track opens on the sending user's IP address. So, if you send a test email to yourself or to a coworker who is on the same IP address, the email opens aren't tracked. As a workaround, open a test email on a different network than it was sent from.
- When you send an email to an archived prospect with Engage for Outlook, the prospect isn't unarchived, and the email activity isn't tracked.
- Email attachments aren't tracked. To track a file, add a link to a Pardot file instead.
- Emails sent with Salesforce Engage tracking are logged to the activity history or timeline on the associated Salesforce records.

Set Up Engage for Outlook

Set up Engage for Outlook so that users can send and track emails from Outlook.

USER PERMISSIONS

To set up Engage for Outlook
- Customize Application

1. Enable Lightning Experience in your org. Users don't have to use Lightning Experience to use Engage for Outlook, but it must be enabled in your org.
2. Turn On the Integration with Outlook.
3. Enable Email to Salesforce. Have users check their Email to Salesforce settings to make sure that the email address they are using with Outlook is mapped. For more information, see How Does Email to Salesforce Work?
4. Enable Enhanced Email.
5. Enable **Engage for Outlook** (in Outlook Integration setup).
6. Have Engage for Outlook users set up their email to Salesforce. Send them to Set Up Email to Salesforce for help.
7. Customize the Outlook Integration Pane.
8. To allow users to view a prospect's activities from Outlook, create custom email application panes.

   Engage for Outlook requires the People component, which is already included if you cloned the default Salesforce layout. If you create a layout, add the People component. Navigate to **Custom** > **Managed** > **Engagement History**, and add the component to your email pane.
9. Activate and assign email panes for Engage for Outlook users.
10. Add the Salesforce Add-In from the Microsoft® Exchange® Center.