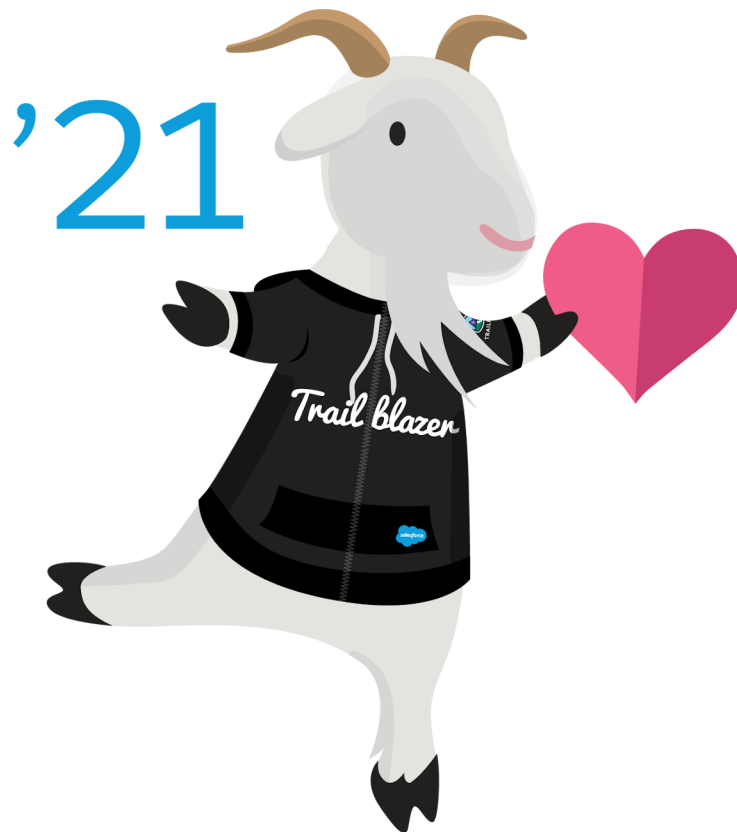

Pardot User Migration Admin Guide

Salesforce, Summer '21



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INTRODUCTION

After February 15, 2021, all users are required to use Salesforce single sign-on (SSO) to access Pardot. If you missed the February 15 deadline and have Pardot-only users who can't log in, set up SSO so they can regain access. This guide walks you through each step of the process.



Important: If you don't have an admin who can access Pardot with SSO and you're locked out, [contact Pardot Support](#).

Before you begin, make sure that you review these resources:

- [Pardot User Migration Overview](#)
- [Pardot User Migration FAQ](#)

Process Overview

Here's a high-level overview of everything you must do to regain access for your users.

- Inventory your current Pardot-only users.
- Map Pardot-only users to Salesforce users.
- Enable Salesforce SSO for all users.
- Update API integrations (if applicable).
- Update your WordPress plugin (if applicable).

About Salesforce Identity Licenses

To ensure your users have access the latest Pardot functionality, we recommend a full CRM license for all Salesforce users. However, we understand this may not be possible for everyone, so your Salesforce org is now bundled with [100 Identity licenses](#) at no additional cost. These licenses are available to you immediately and can be used to create new Salesforce users who you can then assign to Pardot.

Identity licenses let users log in with Salesforce and access Pardot. Identity-licensed users don't have access to the Pardot Lightning app or features that rely on Salesforce, such as Connected Campaigns, Engagement History dashboards, or lead and contact records.

USER MIGRATION PLANNING WORKSHEET

Here's everything you must do to regain access for your Pardot users, plus a couple recommendations. Depending on the size and structure of your org, it's possible you need more than one admin to assist with this process. You can print or save this worksheet to help you plan and track progress on each task.

Task	Owner	Completion Status	Notes
Upgrade to v2 of the Salesforce-Pardot connector (recommended)			
Inventory Pardot-only users			
Create new Salesforce users (if needed)			
Map all Pardot users to a Salesforce user and verify that user mappings are correct			
Enable Salesforce SSO for all users			
Enable Salesforce User Sync (recommended)			
Update API integrations to use Salesforce SSO (if applicable)			
Update WordPress plugin (if applicable)			
Confirm users can access Pardot			

UPGRADE YOUR SALESFORCE-PARDOT CONNECTOR

To take advantage of improvements like on-demand metadata sync, Business Unit Switcher, and the Pardot integration user, upgrade to v2 of the Salesforce-Pardot connector. This step is not required for user migration, but we strongly recommend you consider upgrading to get the most out of Pardot. If you haven't connected Pardot and Salesforce, set up the connector now.

SEE ALSO:

[Setting Up a Salesforce-Pardot Connection for Accounts Purchased After February 11, 2019](#)


[Setting Up the Salesforce-Pardot Connector for Accounts Purchased Before February 11, 2019](#)

Upgrade to v2 of the Salesforce-Pardot Connector

Upgrading to v2 of the Salesforce-Pardot connector is easy and helps you get the most out of Pardot.



Note: Upgrading the connector makes permanent changes to your account. Carefully read the considerations before starting the upgrade process.

1. Open the Connectors page.
 - In Pardot, select **Admin** and then **Connectors**.
 - In the Lightning app, select **Pardot Settings**, and then **Connectors**.
2. Click the  icon next to the Salesforce connector, and then select **Upgrade**.
3. Acknowledge the change to your account and certify that you've reviewed the considerations for upgrading.
4. Click **Next**.
5. Select a connector user, then click **Choose User**.
6. Review your selections, then click **Upgrade Now**. If you select the integration user in Step 3, you must log into Salesforce to complete the upgrade.

A confirmation email is sent when the upgrade is complete.

SEE ALSO:

[Considerations for Upgrading to v2 of the Salesforce-Pardot Connector](#)

EDITIONS

Available in: All Pardot Editions

USER PERMISSIONS

To upgrade the Salesforce-Pardot connector


- Pardot Administrator role

INVENTORY PARDOT-ONLY USERS

Before you make any changes, inventory your Pardot-only users so you know who needs access but doesn't have it. Make sure each user has the correct role and permissions in Pardot.

Filter your users in Pardot to see a list of Pardot-only users. If needed, you can also create a .csv export to work from.

1. Open the Users page. Select **Admin (Pardot Settings)** in the Lightning app), and then **User Management > Users**.
2. Click the View dropdown menu and select **Pardot-only Users** to view the users you must map to Salesforce users.
3. To create an export to work from, click **Tools**, and then select **CSV Export**. You receive an email when each export is complete. Exports are available for download on the Exports page in your Pardot account settings.

If you have Pardot-only users that you know are inactive or not needed, you can delete them. To delete a user, click  and select **Delete**.

EDITIONS

Available in: All Pardot Editions

USER PERMISSIONS

To manage Pardot users

- Pardot Administrator role

PREPARE USER RECORDS IN PARDOT AND SALESFORCE

Identify or create a Salesforce user to associate to each of your Pardot-only users.

To ensure your users have access the latest Pardot functionality, we recommend a full CRM license for all Salesforce users. However, we understand this may not be possible for everyone, so your Salesforce org is now bundled with [100 Identity licenses](#) at no additional cost. These licenses are available to you immediately and can be used to create new Salesforce users who you can then assign to Pardot.



Note: Make sure you're familiar with the guidelines for adding users in Salesforce.

[Add a Single User](#)

Depending on how many Pardot-only users you have, you can add new Salesforce users one at a time.

[Add Multiple Users](#)

You can quickly add up to 10 users at a time to your organization. Your Salesforce edition determines the maximum number of users that you can add.

SEE ALSO:

[Guidelines for Adding Users](#)

Add a Single User

Depending on how many Pardot-only users you have, you can add new Salesforce users one at a time.



Note: Email and username are required fields. An email can be reused across orgs but the username must be unique. The username must be formatted as an email address but it doesn't need to be a real or active email.

1. From Marketing Setup, enter *users* in the Quick Find box, then select **Users**.
2. Click **New User** and fill out the required fields. For User License, you can use one of the 100 Salesforce Identity licenses bundled with your Pardot account.
3. To email the user their login name and a temporary password, select **Generate new password and notify user immediately**.
4. When you're done, click **Save** or **Save & New** to create another Salesforce user.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Contact Manager, Essentials, Group, Professional, Enterprise, Performance, Unlimited, Developer**, and **Database.com** Editions

USER PERMISSIONS

To create users:

- Manage Internal Users

Add Multiple Users

You can quickly add up to 10 users at a time to your organization. Your Salesforce edition determines the maximum number of users that you can add.

1. From Setup, enter *Users* in the *Quick Find* box, then select **Users**.
2. Click **Add Multiple Users**.
3. If multiple user license types are available in your organization, select the user license to associate with the users you plan to create. The user license determines the available profiles.
4. Specify the information for each user.
5. To email a login name and temporary password to each new user, select **Generate passwords and notify user via email**.
6. Click **Save**.
7. To specify more details for the users that you've created with this method, edit individual users as needed.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, Developer,** and **Database.com** Editions

USER PERMISSIONS

To create users:

- **Manage Internal Users**

MAP USERS AND ENABLE SALESFORCE SINGLE SIGN-ON

Map Pardot-only users to the correct users in Salesforce, and then enable Salesforce single sign-on (SSO). The process for completing these steps depends on whether you have Salesforce User Sync enabled in Pardot.

EDITIONS

Available in: All Pardot Editions

[Setup for Accounts with User Sync](#)

If you have Salesforce User Sync enabled in Pardot, map your Pardot-only users to the correct Salesforce user. After you map your users, Salesforce User Sync will automatically convert them to single sign-on (SSO).

[Setup for Accounts Without User Sync](#)

If Salesforce User Sync isn't enabled in your Pardot account, you can create a .csv file of your Salesforce users and import it to Pardot. As part of the import process, map your Salesforce users to the correct Pardot users and enable Salesforce single sign-on (SSO).

Setup for Accounts with User Sync

If you have Salesforce User Sync enabled in Pardot, map your Pardot-only users to the correct Salesforce user. After you map your users, Salesforce User Sync will automatically convert them to single sign-on (SSO).



Note: After users are converted to SSO, they can no longer log in with their Pardot credentials. Notify your Pardot-only users about this change before you begin mapping users.

[Map Salesforce and Pardot Usernames](#)

If you have existing Pardot users, map them to their user record in Salesforce before you proceed with Salesforce User Sync. If users aren't mapped, the system ignores those Pardot users and they don't sync. For business units without User Sync, map users and then enable Salesforce Single Sign-on (SSO). Salesforce credentials are required to access Pardot.

SEE ALSO:

[User Sync Basics](#)

Map Salesforce and Pardot Usernames

If you have existing Pardot users, map them to their user record in Salesforce before you proceed with Salesforce User Sync. If users aren't mapped, the system ignores those Pardot users and they don't sync. For business units without User Sync, map users and then enable Salesforce Single Sign-on (SSO). Salesforce credentials are required to access Pardot.

1. In Pardot, open the user record for editing.
2. From the CRM Username dropdown, select the user's Salesforce username.
3. Save the user.
4. Click the **Verify now** link in the CRM Username line of the user record.

Repeat these steps for each user you want to map.

Setup for Accounts Without User Sync

If Salesforce User Sync isn't enabled in your Pardot account, you can create a .csv file of your Salesforce users and import it to Pardot. As part of the import process, map your Salesforce users to the correct Pardot users and enable Salesforce single sign-on (SSO).

Requirements for User Migration

Before you use the import tool to map users and enable Salesforce SSO, keep these requirements in mind:


- Prepare your .csv file for import before you begin. Include a CRM Username header and list the usernames for your Salesforce users so you can map them to your users in Pardot.
- Enable Salesforce SSO for the users in your import.

[Import Users](#)

You can create or update up to 50 users at once by importing a CSV file.

Import Users

You can create or update up to 50 users at once by importing a CSV file.

 **Note:** User import isn't available in accounts with Salesforce User Sync enabled.

Before you begin, make sure that your import file meets these criteria.

- UTF-8 encoded to preserve special characters
- Contains a header row with First Name, Last Name, and Email Address headers, at minimum
- Smaller than 100 MB

These headers are accepted in import files.

- Email Address (required)
- First Name (required)
- Last Name (required)
- CRM Username (required)
- Job Title
- Password Expires (Yes or No)
- Phone Number
- Role
- Tags
- URL

1. Open the Users page. Select **Admin (Pardot Settings in the Lightning app)**, and then **User Management > Users**.
2. Click **Import Users**.
3. Click **Choose File**, and select the import file.
4. Click **Next**.
5. Map the fields.
6. Select a time zone. This setting applies to all users that you're importing.

EDITIONS

Available in: All Pardot Editions

USER PERMISSIONS

To import users:

- Pardot Administrator role

7. To allow Pardot access, Salesforce single-sign on is selected by default.
8. When finished configuring the import, click **Next**.
9. Review your import, then click **Confirm & Save**.

When your import is finished, Pardot sends an email confirmation.

UPDATE API INTEGRATIONS

If you use API integrations, update them to authenticate to Salesforce SSO instead of Pardot's authentication system.

Work with your developer to update API integrations to authenticate through Salesforce as soon as possible.

Pardot has contacted these third-party API integration partners.

- Drift
- FeedOtter
- On24
- TaxiForEmail
- Tray.io
- Qualified
- Zapier
- Zoom

If you use a third-party service that isn't on this list, contact them about updating their Pardot API integration.

SEE ALSO:

[Developer Docs: Pardot API Documentation](#)

UPDATE THE WORDPRESS PLUGIN

To help prepare for this change, Pardot's WordPress plugin has been updated to authenticate via Salesforce SSO. If you use the WordPress plugin, you must update it to the new version

EDITIONS

Available in: All Pardot Editions

Install the Pardot WordPress Plug-In

Your WordPress.org admin must install the Pardot plug-in. The Wordpress plug-in is only available for Pardot editions with API access.

To use Salesforce SSO authentication, you must create a connected application for the plugin in Salesforce. See [Configure Basic Connected App Settings](#)

EDITIONS

Available in: Pardot **Plus**, **Advanced**, and **Premium** Editions

1. Download the [Pardot WordPress plug-in](#).
2. Add the plug-in to your site in one of two ways.
 - In the WordPress admin area, click **Plugins** and **Add New**. Search for Pardot.
 - Upload pardot-for-wordpress to your `/wp-content/plugins` directory.
3. Activate the plug-in.
4. Navigate to Settings and click **Pardot Settings**.
5. Select **Salesforce SSO** for the authentication type.

Pardot Authentication is being retired in February 2021.
6. Enter a Consumer Key, Consumer Secret, and Business Unit ID.

Find the Consumer Key and Secret in the connected application of Salesforce setup. The Business Unit ID can be found in Pardot Account Setup.
7. Click **Authenticate with Salesforce** and enter your Salesforce username and password.
8. Select a campaign. The campaign's Pardot tracking code is added to your WordPress site.
9. Save your settings.

NEXT STEPS

When you're done with all the tasks outlined in this guide, there are a few follow-up items to consider.

Communicate Changes to Your Pardot Users

Contact your Pardot-only users to confirm that they can log in with their Salesforce single sign-on (SSO) credentials.

Make Plans for Training Environments

Pardot training environments use Pardot-only authentication. If you have an active training environment that you want to continue to use, follow this guide so users who need access can log in with Salesforce SSO. If you're locked out of your training environment, [contact Pardot Support](#).

If you're a Pardot Plus, Advanced or Premium customer, use Developer Sandboxes for Pardot for your testing needs.

Enable Salesforce User Sync

Salesforce User Sync lets you create and manage your Pardot users in Salesforce. If you don't use Salesforce User Sync to manage users in Salesforce, consider setting it up now. After you map your Pardot and Salesforce users, the process to set up Salesforce User Sync is simple.

SEE ALSO:

[Create a Sandbox for Pardot](#)