salesforce

Pardot Lightning App Implementation Guide

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PARDOT LIGHTNING APP IMPLEMENTATION GUIDE

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Considerations for Enabling the Pardot Lightning App

Before enabling the Pardot Lightning app, review these considerations to make sure that your Salesforce org and users are ready.

- Lightning Experience must be enabled in Salesforce.
- You must have a Pardot account with a configured Salesforce connector or a Pardot Business Unit.
  - If your Pardot account was created before February 12, 2019, see Salesforce-Pardot Connector Implementation Guide (PDF) for help.
  - If your Pardot account was created after February 12, 2019, see Salesforce-Pardot Connector v2 Implementation Guide (PDF) for help.
  - If your account uses Pardot Business Units, see Pardot Business Units Implementation Guide (PDF) for help.
- Salesforce users must be mapped to Pardot users to access the app. We recommend enabling Salesforce User Sync before enabling Pardot for Lightning. See Manage Users with Salesforce User Sync.
- To use the Pardot Lightning app, users need the Salesforce license. Other licenses, like Identity, Salesforce Platform, and Salesforce Platform One, don't provide access to the Pardot Lightning app.
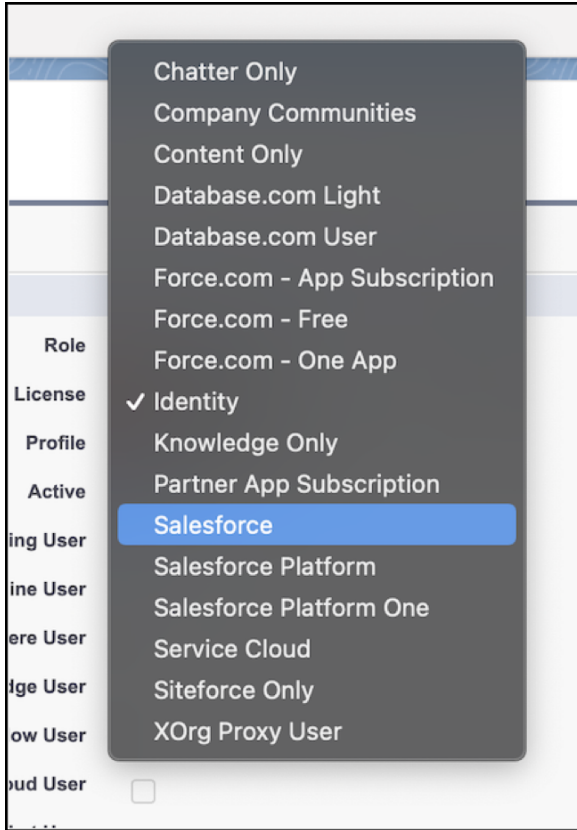
Understanding What Salesforce Data Can Be Seen in Pardot

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📝 **Note:** Pardot and Salesforce have always had separate authorization and sharing models, and nothing has changed with the introduction of Pardot for Lightning. This information applies to all versions of Pardot, including Pardot for Lightning and the standalone app.

Authorization and Sharing Basics

Authorization is a user's ability to read, create, update, or delete an object. Sharing is a user's ability to view, update, or delete a record.

Salesforce has another level in its sharing model—field level security. Field permissions control whether a user can see, edit, and delete the value for a particular field on an object.

Security Type	How It's Controlled in Salesforce	How It's Controlled in Pardot
Authorization	Profiles and permission sets	User roles
Sharing	Organization-wide sharing settings, role hierarchy, sharing rules, manual sharing.	Groups and folders
Field Security	Field level security	None

Salesforce uses a layered data sharing design that allows you to expose different data sets to different users. This sharing model lets users do their jobs without seeing data they shouldn't see. There are many ways to control data visibility. For more information, see Manage Data Access.

In Pardot, access to data is controlled by user roles, groups, and folder permissions. User roles define which Pardot features and data a user can access. Folder permissions gives folder access to specific user groups. Folders can't be used to limit user access to prospects because prospects can't be put in folders.

📝 **Note:** When a Pardot user is connected to a Salesforce user, their permissions in Salesforce control what data they see in Salesforce.

Visibility Conflicts

When a Pardot user has Salesforce permissions that are more restrictive than the connector user, they can view Salesforce data in Pardot that they don't have permission to view in Salesforce. This is called a visibility conflict.

👁 **Example:** Pat is a Salesforce user who doesn't have permission to view Salesforce campaigns. His Salesforce user is synced to a Pardot user. Pat works on an engagement program in Pardot and creates a step that adds a prospect to a CRM campaign. Pat sees all synced Salesforce campaigns in the dropdown, and can choose any for the step. Because the connector user has permission to view and edit campaigns in Salesforce, Pat also has access to view and edit Salesforce campaigns within Pardot.

For more information about connector user permissions, see Assign the Pardot Connector User Permission Set and Assign Object Permissions to the Connector User.

To minimize visibility conflicts, we recommend the following steps.

- Decide what kind of visibility you want your users to have, and document those requirements.
- Have your Salesforce and Pardot admins collaborate so that each system is configured to meet your requirements.
- Limit the number of users whose Salesforce access is less than the connector user.
- When in doubt, contact Salesforce Customer Support for guidance.

Give Users Access to the Pardot Lightning App

Admins can enable Pardot in Lightning Experience and assign the required permission to users.

1. Verify that your Pardot and Salesforce users are linked. We strongly recommend Salesforce User Sync. See Manage Users with Salesforce User Sync.

2. Open Marketing Setup, and make sure that Pardot is enabled.

> ③ **Enable Pardot in Your Salesforce Org**
> Make Pardot available to your admin users. After Pardot is enabled, your admins can configure their business units.
> Disable 🔵

3. Give users access to the Pardot connected app.

   a. From Salesforce Setup, in the Quick Find box, enter `Connected`, and then select **Manage Connected Apps**.

   b. From the list, select **b2bma_canvas**.

   c. Click **Manage Profiles** or **Manage Permission Sets** to assign the connected app to users who need access to the Pardot Lightning app.

EDITIONS

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

USER PERMISSIONS

To enable the Pardot Lightning app:
- Customize Application

To edit app permissions:
- Manage Profiles and Permission Sets

4. Assign the Sales Cloud User, Service Cloud User, or CRM User permission set.

    a. From Marketing Setup, in the Quick Find box, enter `Permission Sets`, then select **Sales Cloud User**, **Service Cloud User**, or **CRM User** from the list.

    b. Click **Manage Assignments**.

    c. Click **Add Assignments** and choose all users who need access to the Pardot Lightning app.

    > 📝 Note: If you'd rather use a custom permission set, create and assign one with the 'Allow access to all Pardot features' app permission. For maximum flexibility, don't choose a license for the new permission set. Your users still need the **Sales Cloud User**, **Service Cloud User**, or **CRM User** permission set license to use the Pardot Lightning app.

5. Make the Pardot Lightning app visible to profiles.

    a. From Salesforce Setup, in the Quick Find box, enter `App Manager`, and then select **App Manager**.

    b. Find the Pardot app with the App Type `Lightning`, and then edit it.

    c. Click **User Profiles**, and then select all profiles that need access to the app.

After the app is enabled, it appears in the App Launcher for all users with a Sales Cloud, Service Cloud, or CRM user seat who have the app permission assigned.

Remove the Pardot Classic App

After you enable the Pardot Lightning app, two Pardot apps appear in your account. One is the Lightning app, and the other is Pardot Classic. To avoid confusing your users, remove access to the Pardot Classic app for all profiles.

> 📝 Note: The Pardot Classic app isn't available in accounts provisioned after October 11, 2021.

1. From Setup, in the Quick Find box, enter `App Manager`, and then select **App Manager**.
2. Find the Pardot app with the Developer Name `ProspectInsight`, and then edit it.
3. Scroll to Assigned Profiles, and then deselect **Visible** for all profiles.

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USER PERMISSIONS

To remove the Pardot Classic app:
- Customize Application

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Guidelines for Using the Pardot Lightning App

Keep these guidelines in mind when using the Pardot Lightning app.

- Navigation in the Pardot Lightning app is slightly different than the standalone Pardot app.
- Tabs for Engagement Studio and Pardot Campaigns are not displayed by default. Users can add these tabs themselves, or a Salesforce admin can add them for all users.
- To use the app in Safari, disable the "Prevent cross-site tracking" preference. The Pardot Lightning app pulls most data from the standalone Pardot app, and the preference blocks access from Lightning.
- Links to Pardot in system emails point to the standalone Pardot app, not the corresponding screen in the Lightning app.
- You can add, remove, and reorder tabs, but you can't edit sidebar items.
- Pardot drip programs are not available in the Lightning app. Try Engagement Studio instead.

Troubleshooting Common Pardot Lightning App Problems

Find out how to solve the most common problems with Pardot Lightning app enablement.

You don't see the b2bma_canvas connected app

Confirm that you're enabling the app in a production environment. The Pardot Lightning app isn't available in developer or trial orgs. If you still don't see the app, contact your Salesforce Account Executive.

Users get an error: "You don't have permission to view application within namespace[b2bma] and API name [b2bma_canvas]"

Give users access to the connected app.

When users open the app, it doesn't load

Make sure that your Salesforce-Pardot connector is verified and that you have connected your Pardot and Salesforce users.

Users don't see the Pardot app in the App Launcher

Make sure that the Pardot Lightning app is enabled. Then, make sure that your users have the CRM User, Sales Cloud User, or Service Cloud User permission set.