Salesforce User Sync Implementation

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INTRODUCTION

Salesforce User Sync is the best and simplest way to manage Account Engagement user access. This feature transfers Account Engagement user management to Salesforce, and lets you add or remove users from Marketing Setup.

> ⊘ **Important:** The process for User Sync setup varies depending on when your business unit was created and if you currently use the legacy version. To make sure you're following the correct instructions, see Find the Right User Sync Documentation.

CONSIDERATIONS FOR MOVING TO THE LATEST VERSION OF USER SYNC

If Salesforce User Sync was enabled before July 20, 2020, there are some important things to know before moving to the latest version.

> **Note:** Pardot is now known as Marketing Cloud Account Engagement. We wish we could snap our fingers to update the name everywhere, but you can expect to see the previous name in a few places until we replace it, including in the app itself.

- After User Sync is enabled, assignments are no longer solely profile-based. Users can be assigned to Account Engagement by public group membership, role, role and subordinates, or individually.
- Make sure you review User Sync Basics before you transfer user management to Salesforce.
- After transferring user management, the User Sync section on the Salesforce connector screen is used only for updating how Salesforce profiles map to Account Engagement user roles. The old User Sync settings are replaced by this default behavior.

Setting	New Default Behavior
Update Pardot user role when a user's Salesforce profile changes	Users inherit their roles from the Map Salesforce Profiles to Pardot Roles table in user sync settings.
Move Pardot user to the recycle bin when they no longer have an assigned profile	Profile-based user assignment doesn't exist.
Skip Salesforce user whose email address matches an existing user record in Pardot	If there's a user in Account Engagement with the same CRM username or email address, User Sync skips them and doesn't create a new Account Engagement user record.

USER SYNC BASICS

User Sync moves Account Engagement user access settings to Marketing Setup in Salesforce. Synced user records in Account Engagement are read-only and inherit information from Salesforce.

📝 **Note:** Pardot is now known as Marketing Cloud Account Engagement. We wish we could snap our fingers to update the name everywhere, but you can expect to see the previous name in a few places until we replace it, including in the app itself.

Process Overview

If you use the legacy version of User Sync, make sure you also review Considerations for Moving to the Latest Version of User Sync. If you're not sure what your User Sync status is, see Find the Right User Sync Documentation.

To take advantage of Salesforce User Sync, first assign Salesforce users to Account Engagement and then transfer user management to Salesforce. This process requires a Salesforce admin and an Account Engagement admin. Depending on the structure of your business, it's possible you need more than one person to complete all the tasks.

This video walks through User Sync setup: ▶ Manage Engagement Users with Salesforce User Sync (English Only).

User Management

Here's how user management works after user management is transferred to Salesforce.

- An Account Engagement user record is created for any user assigned to Account Engagement in Salesforce. You can assign users individually, or based on public group, role, or role and subordinates.
- The Salesforce user record is the source of truth. All Account Engagement user fields update to match the Salesforce record.
- When a user sends an email in Account Engagement, the email is sent from the email address on their Salesforce user record.
- Account Engagement user alerts and notifications are sent to their Salesforce email.
- If an assigned user is in the recycle bin in Engagement, the user record is restored.
- To delete an Account Engagement user, unassign them in Salesforce. Unassigning a user sends their record to the recycle bin in Engagement.
- If there's an Account Engagement user with the same email address as a Salesforce user but they're not mapped, User Sync skips them. A new Account Engagement user record isn't created and the existing user profile isn't synced.
- Changes to user records in Salesforce typically sync within 10 minutes. If you have tens of thousands of users, the sync can take up to an hour.

Salesforce Profiles and Account Engagement Roles

When you assign users to Account Engagement, you add them to the Marketing Users group or the Sales Users group. User group assignments can be used for sharing rules, and they correspond to default Account Engagement role assignments.

Salesforce profiles are mapped one-to-one to Account Engagement user roles, but some scenarios require a more granular Salesforce profile. If your users that share a Salesforce profile need different levels of access in a business unit, you can give a user a more granular profile.

👁 **Example:** Jon and Deepa both have the Marketing profile in Salesforce. Jon needs the Marketing Manager role in the Europe business unit, and Deepa needs the Marketing role. Because Jon and Deepa share the original profile, and profiles are mapped one-to-one to user roles, the Salesforce admin creates a unique profile for Jon. The Europe business unit admin maps the new profile to the correct Account Engagement user role.

⊘ **Important:** Assign admins and most other Account Engagement users to the Marketing User group in Salesforce. The Sales User group is only for sales reps who need restricted access to Account Engagement.

After users are assigned to Account Engagement, the Account Engagement admin can update the profile-to-role mapping table for the Marketing User group, or leave the default mapping in place.

Here's how roles are determined by default:

- Users in the Sales Users group always inherit the Sales role in Account Engagement. This role mapping can't be edited.
- Users in the Marketing Users group have their Salesforce profile mapped to the Marketing role in Account Engagement. This mapping is editable.
- If the Account Engagement admin who created the business unit is in the Marketing Users group, they retain the Account Engagement admin role.

This chart shows how user assignments translate to default roles. The default Account Engagement role is editable for all users assigned to the Marketing Users group in Salesforce.
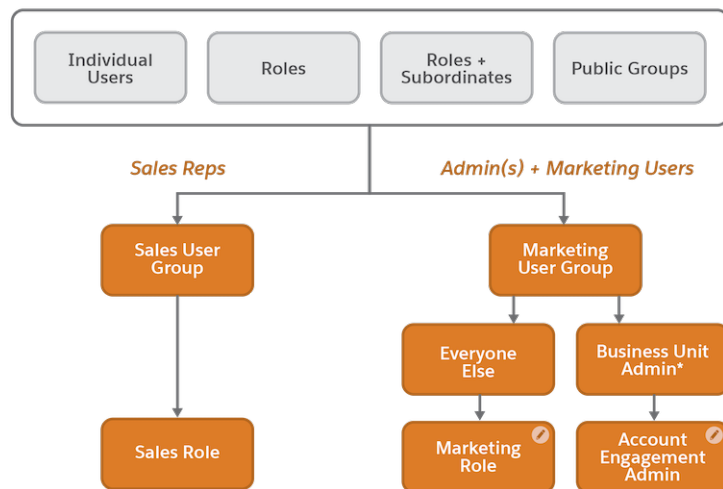
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MAP SALESFORCE AND ACCOUNT ENGAGEMENT USERNAMES

If you have existing Account Engagement 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 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 Account Engagement.

1. Open the user record that you want to work with.

2. From the CRM Username dropdown, select the user's Salesforce username.

3. Save the user.

4. Click **verify now** in the CRM Username row of the user record.

Repeat these steps for each user you want to map.

ASSIGN SALESFORCE USERS TO ACCOUNT ENGAGEMENT

From Marketing Setup in Salesforce, assign users to Account Engagement. You can assign users individually, or based on public group, role, or role and subordinates.

> **Note:** We recommend that most users, including admins, be assigned to the Marketing Users group. Use the Sales Users group for Sales reps only.

1. From Marketing Setup, in the Quick Find box, enter `Business`, then select **Business Unit Setup**.

2. Next to your business unit, click **Manage Users**.

3. Click **Edit User Assignments**.

4. Add users to the Marketing Users group and the Sales Users group.

5. Save your changes. To see a complete list of your assigned users, click View All Users.

After you assign users, the Account Engagement admin can update the roles for users in the Marketing Users group, and then transfer user management to Salesforce.

EDITIONS

Available in: All Account Engagement Editions

USER PERMISSIONS

To assign Salesforce users to business units:
- Customize Application and Manage Users

To enable Salesforce User Sync or transfer user management to Salesforce:
- Account Engagement Administrator role

TRANSFER USER MANAGEMENT TO SALESFORCE

After your Salesforce admin has assigned users to Account Engagement, your Account Engagement admin can map Salesforce profiles to user roles in Account Engagement. Then, the Account Engagement admin transfers user management to Salesforce to create an Account Engagement profile for users assigned from Salesforce.

1. Open the Salesforce Connector page.

   - In Account Engagement, select **Admin** and then select **Connectors**. Click ⚙ next to the Salesforce Connector, and select **Edit**.
   - In the Lightning app, select **Account Engagement Settings** and then **Connectors**. Click ⚙ next to the Salesforce connector, and select **Edit Settings**.

2. Click the **User Sync** tab.

3. Review the default user roles for each Salesforce profile. If needed, use the dropdowns to change the assigned roles. You can come back and edit the profile-to-role mapping table later.

4. Save your changes, and then click **Opt In** to transfer user management to Salesforce.

After user management is transferred, a profile is created for each user assigned in Salesforce. User changes in Salesforce typically take about 10 minutes to take effect.

SEE ALSO:
Update Profile and Role Mapping