salesforce

Enable Salesforce User Sync (Legacy)

Salesforce, Spring '24

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INTRODUCTION

Salesforce User Sync lets you manage Account Engagement user access from Marketing Setup in Salesforce. If you purchased Account Engagement before July 17, 2020 and have never set up Salesforce User Sync, use this guide to enable and configure it.

⊘ **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.

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.
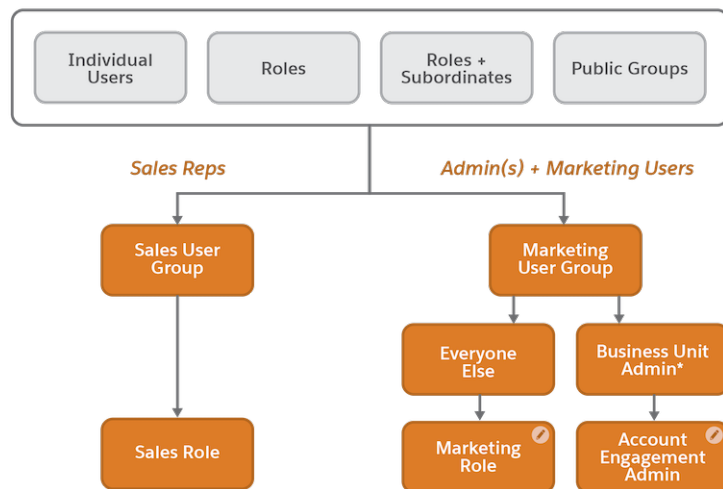
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MAP SALESFORCE AND ACCOUNT ENGAGEMENT USERNAMES

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

ENABLE SALESFORCE USER SYNC

After users are assigned to Account Engagement from Salesforce, the Account Engagement admin can enable Salesforce User Sync. Enabling User Sync permanently transfers user management to Salesforce.

1. Open the Connectors page.

    - In Account Engagement, select **Admin** and then select **Connectors**.

    - In the Lightning app, select **Account Engagement Settings** and then **Connectors**.

2. Click **Enable Salesforce User Sync** and follow the prompts.

3. Select the profiles to include and map them to user roles. All assigned Salesforce users with the selected profiles are created as Account Engagement users with the assigned role.

4. When you're ready, click **Enable Salesforce User Sync**.

Users are typically created and synced within 10 minutes. If you have tens of thousands of users, it can take up to an hour. You can come back to the profile-to-role mapping table in Account Engagement at any time and update the assigned roles.

SEE ALSO: