Scan to Salesforce

Pardot Integration Guide

Update Date: March 31, 2020

In this guide, we walk you through how you can initiate Pardot scenario with Leads created by Scan to Salesforce. To conduct below actions, you need an administrator role on Pardot.

Step 1 Setting up a campaign on Salesforce

Step 2 Building a dynamic list on Pardot

Step 3 Creating an email template on Pardot

Step 4 Building a scenario on Pardot

Step 5 Assigning campaigns when creating leads from Scan to Salesforce

Support

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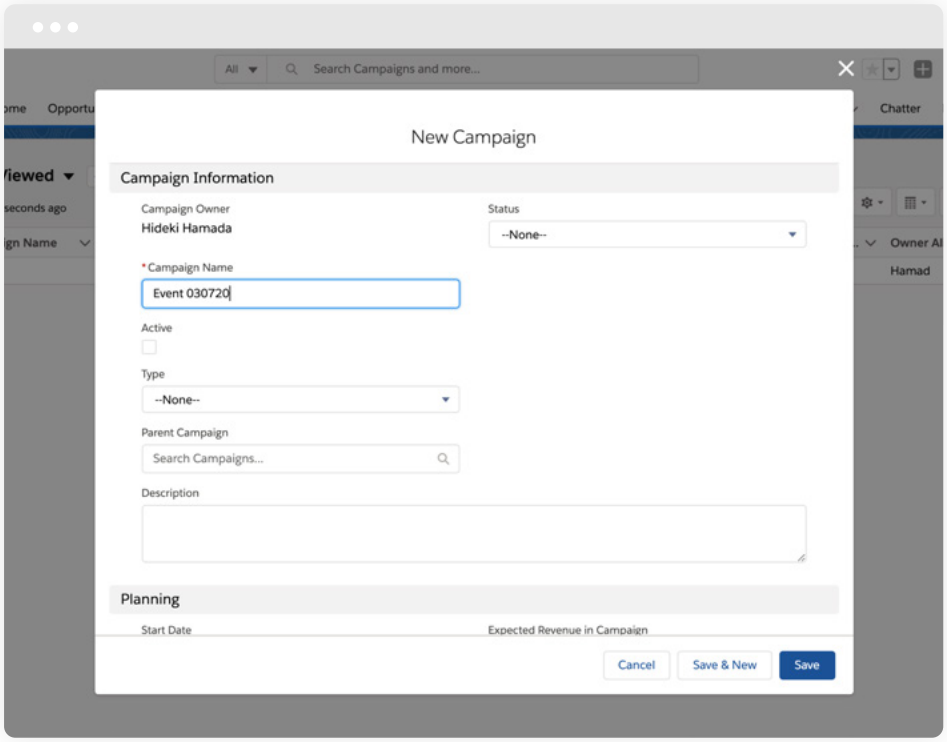
Step 1: Setting up a campaign on Salesforce

In Salesforce, go to Campaigns and click New. Once you create a campaign on Salesforce, it will be synced with Pardot.



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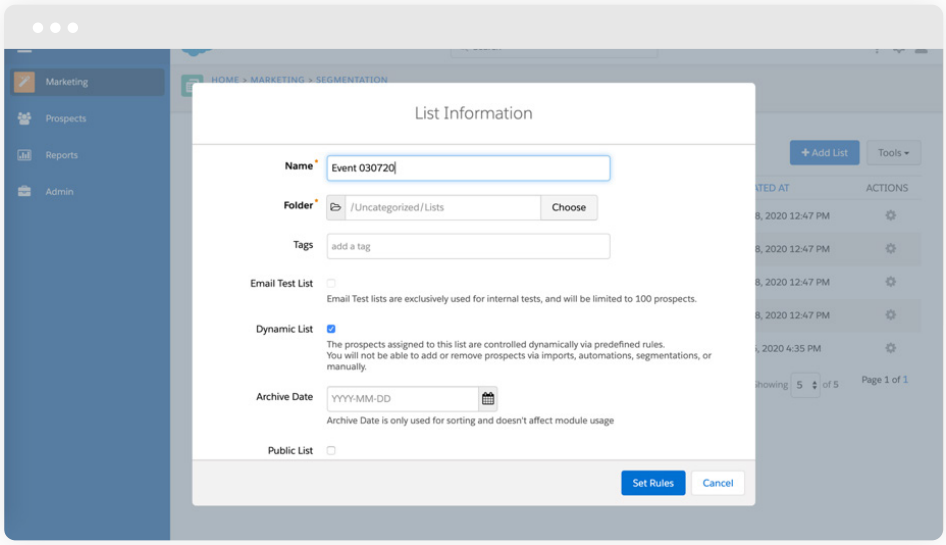
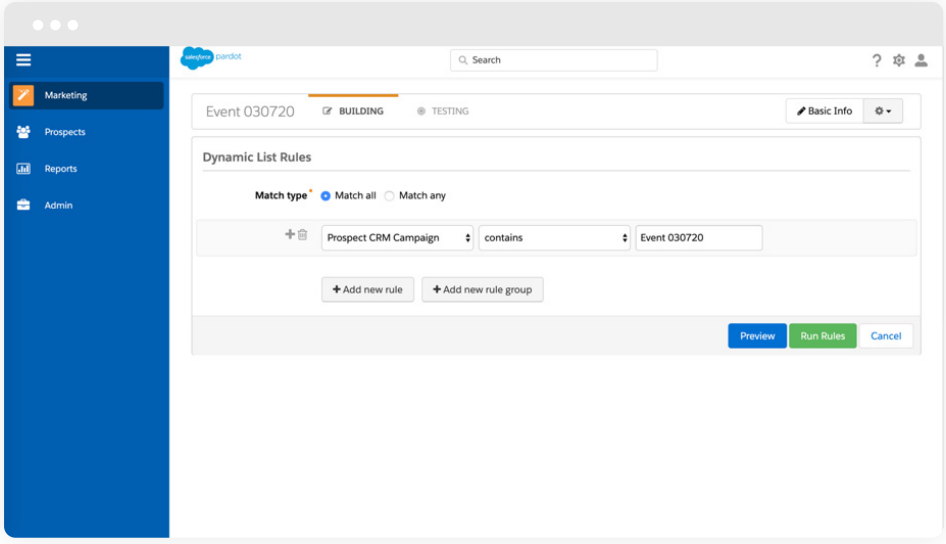
Step 2: Building a dynamic list on Pardot

1: In Pardot, go to Marketing > Segmentation > Lists and click Add List.
2: In List Information section, choose Dynamic List and click Set Rules.



3: In Dynamic List Rules section, create a rule to catch prospects that are associated with the campaign you created in Step 1 of this guide.



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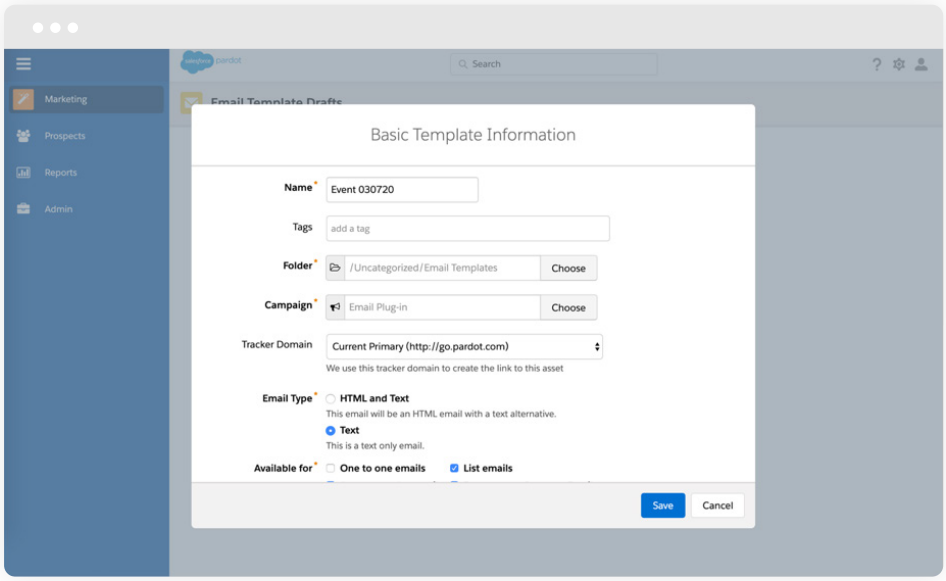
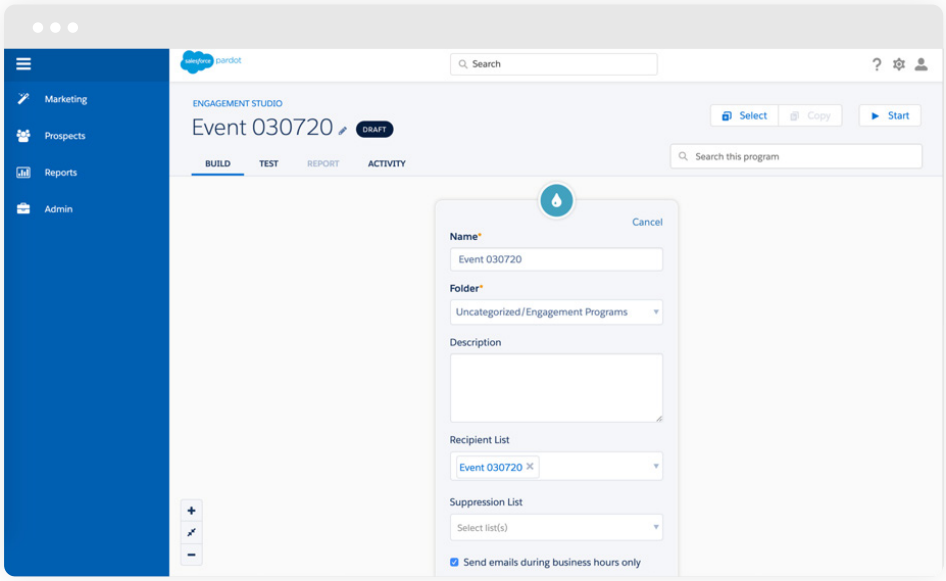
Step 3: Creating an email template on Pardot

In Pardot, go to Marketing > Emails > Templates and click Add Email Template. Build email template that you want to send to your prospects.



Step 4: Building a scenario on Pardot

1: In Pardot, go to Marketing > Engagement Studio and click Add Engagement Program.
2: Create a start event and add the Dynamic List you built in Step 2 on Recipient List.



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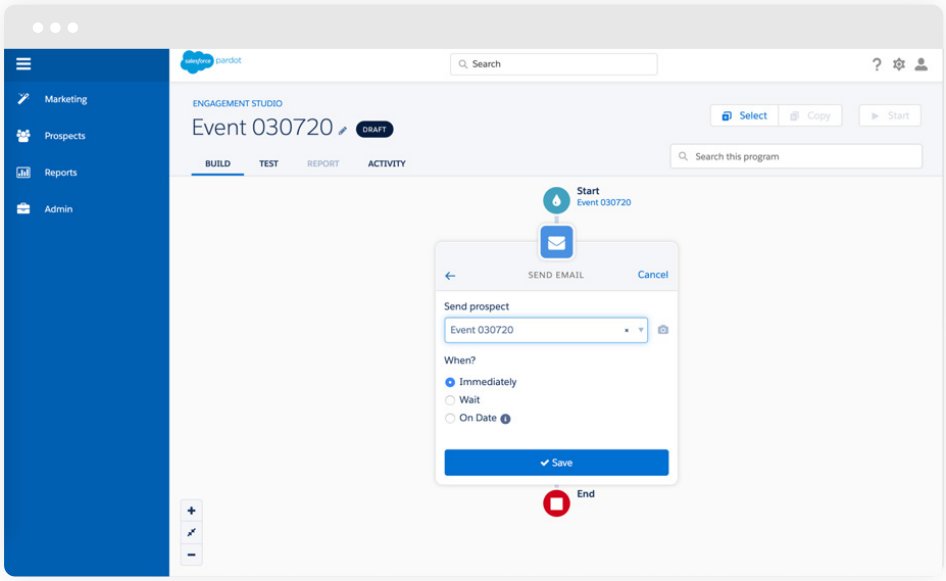
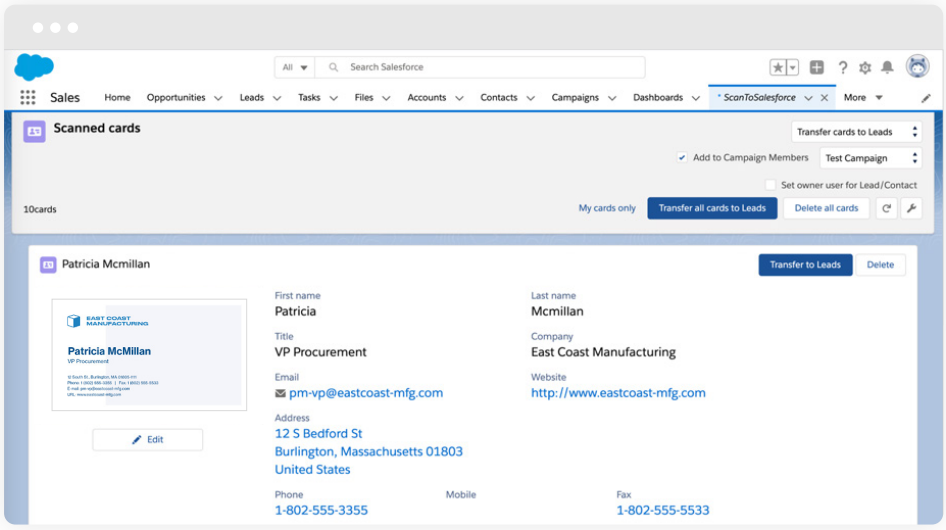
3: Click + button and choose Action > Send Email.
4: In the pop up, choose the email template you created in Step 3.
5: Click Start button.



Step 5: Assigning campaigns when creating leads from Scan to Salesforce

1: In Pardot, go to Marketing > Engagement Studio and click Add Engagement Program.
2: Create a start event and add the Dynamic List you built in Step 2 on Recipient List.
3: Choose business card(s) you want to send emails to and click Transfer (all cards) to Leads. In a few minutes, those Leads shall receive an email you created in Step 3.



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Support

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https://scantosalesforce.zendesk.com/hc/en-us/requests/new

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