



Salesforce Engage



Talking points

- **What is Salesforce Engage**
- **How to install Salesforce Engage**
- **Salesforce Engage**
- **Engage Alerts**
- **Engage Reporting**
- **Q&A with Rahmaan**

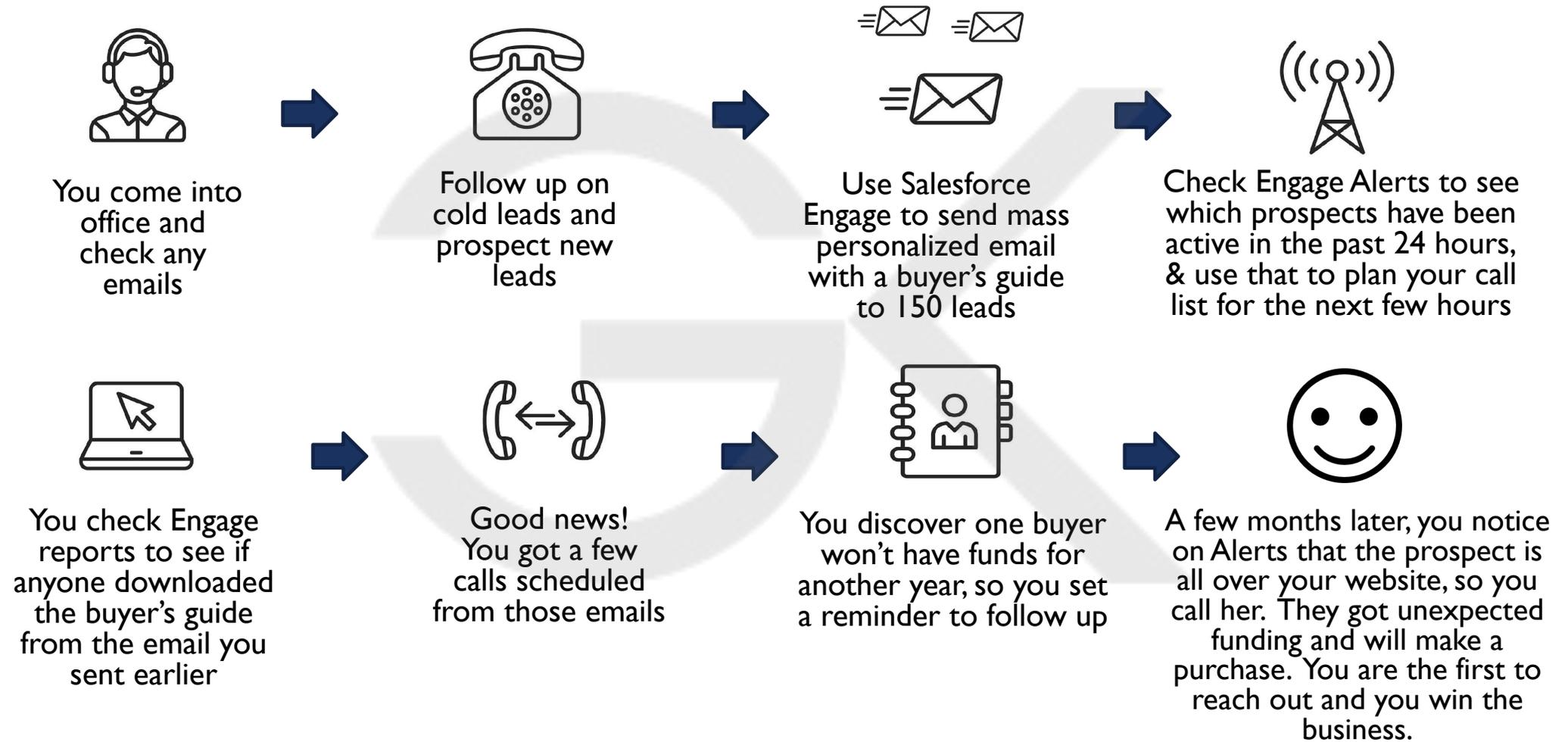


What is Salesforce Engage?

Example of Typical Sales Activities Today

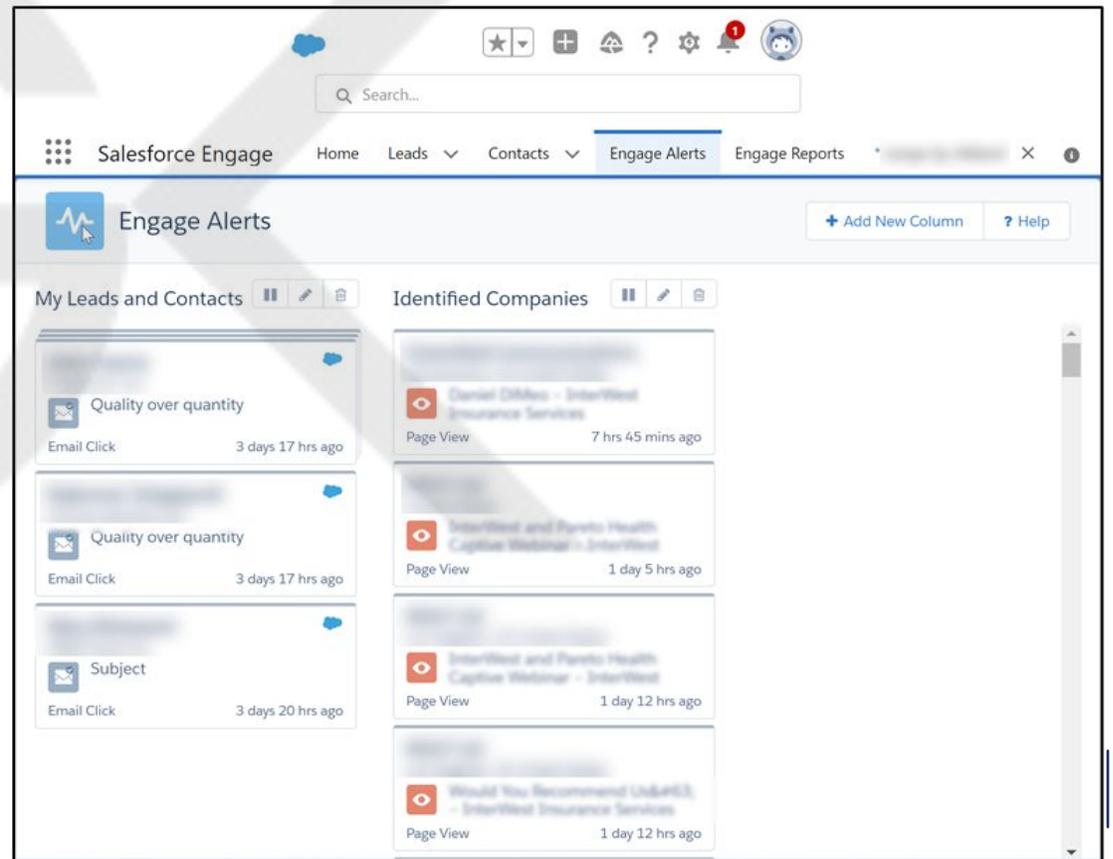
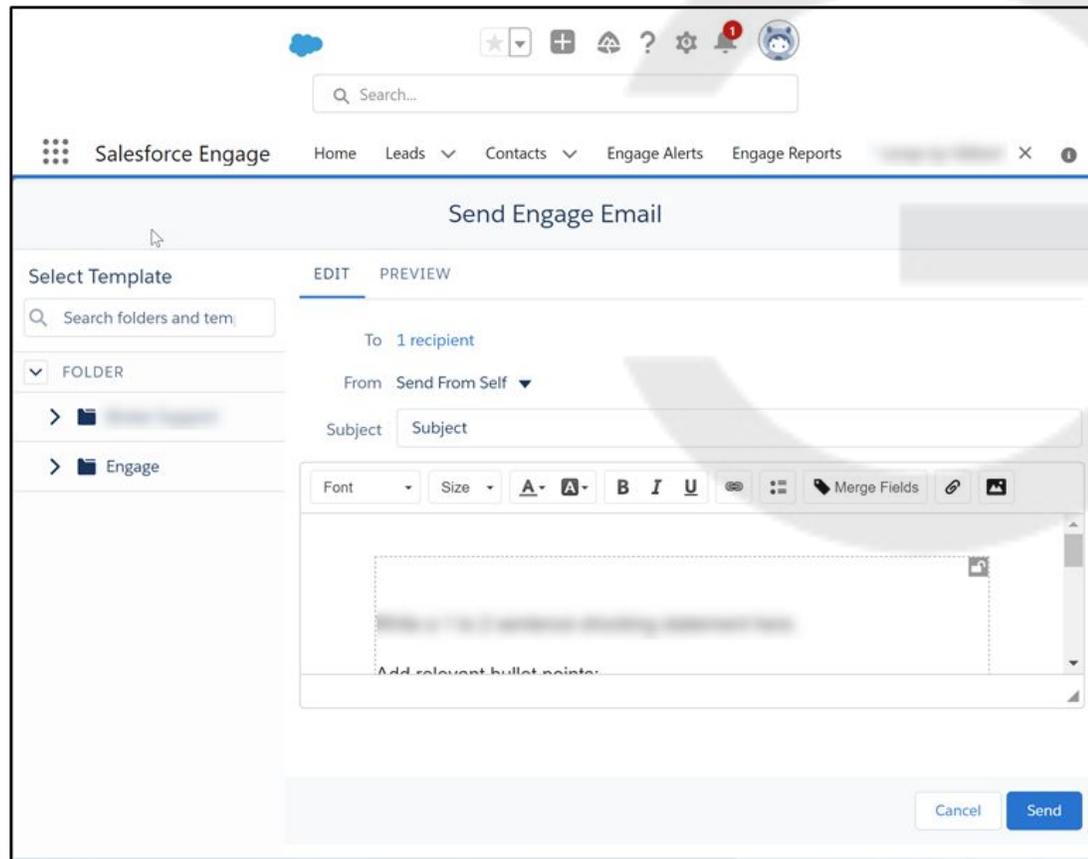


Example of Activities With Salesforce Engage



Salesforce Engage

Empowers your Sales team to send marketing emails and track the Engagement.





How do you install Salesforce Engage?

Enable Salesforce Engage

Easy setup when you follow the links.

Links: https://help.salesforce.com/s/articleView?id=sf.pardot_sf_engage_setup_parent.htm&type=5
https://help.salesforce.com/s/articleView?id=sf.pardot_sf_engage_team_reports_parent.htm&type=5
https://resources.docs.salesforce.com/latest/latest/en-us/sfdc/pdf/pardot_salesforce_engage_implementation_guide.pdf

1. Enable Salesforce User Sync to add Engage Users to Pardot
2. Assign “Salesforce Engage” permissions to users
3. Edit Engage account settings.
4. Set template options (Classic or Lightning)
5. Add “Add to Engagement Studio” and “Send Engage Email” buttons
6. Enable Engage Teams Reports

Separate package install (second link above)

Setup | Home | Object Manager

Search Setup

company inf

Company Settings

Company Information

Didn't find what you're looking for? Try using Global Search.

Company Information

Permission Set Licenses

Name	Status	Total Licenses	Used Licenses	Remaining Licenses	Expiration Date	Enabled for Integrations
Sales Cloud Engage	Active	45	19	26	3/25/2025	<input type="checkbox"/>
Sales Console User	Active	48	0	48	2/15/2024	<input type="checkbox"/>
Sales User						<input type="checkbox"/>

[Buy More Licenses](#)

Feature Licenses

Feature Type	Status	Total Licenses	Used Licenses	Remaining Licenses
Flow User	Active	48	0	48
Marketing User	Active	48	3	45
Offline User	Active	48	0	48
Salesforce CRM Content User	Active	48	0	48

Go to Setup > Company Information to see your license count.

Assign Engage Licenses

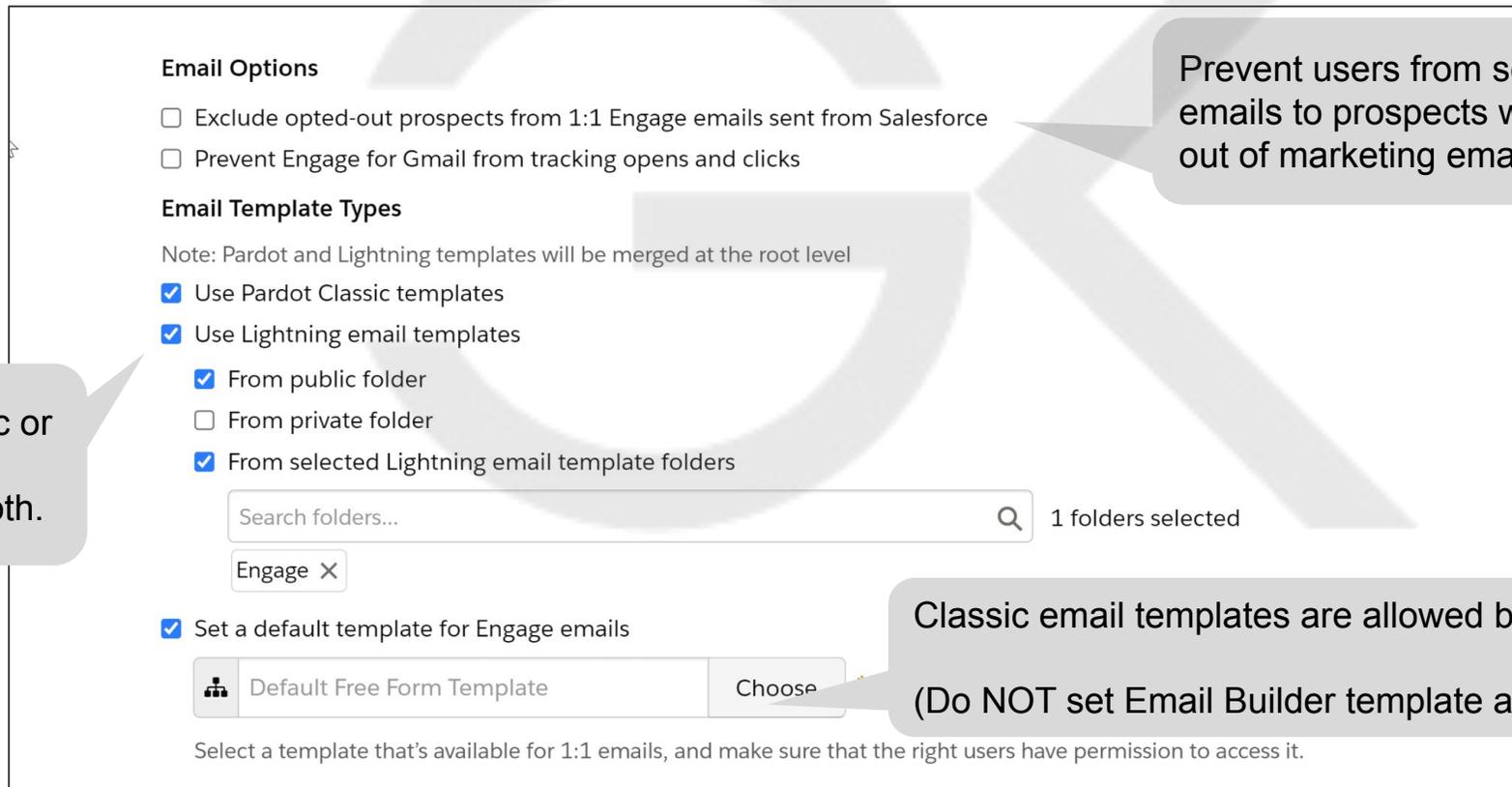
Go to the License Assignment tab to assign.

Remaining Licenses: 26

Selected Users: 0

Enable Salesforce Engage

Go to Pardot Settings > Account Settings > Edit > Expand Salesforce Engage



The screenshot shows the 'Salesforce Engage' settings page in Pardot. It is divided into two main sections: 'Email Options' and 'Email Template Types'. Under 'Email Options', there are two unchecked checkboxes: 'Exclude opted-out prospects from 1:1 Engage emails sent from Salesforce' and 'Prevent Engage for Gmail from tracking opens and clicks'. Under 'Email Template Types', there is a note: 'Note: Pardot and Lightning templates will be merged at the root level'. Below the note are four checked checkboxes: 'Use Pardot Classic templates', 'Use Lightning email templates', 'From public folder', and 'From selected Lightning email template folders'. There are also two unchecked checkboxes: 'From private folder'. Below these is a search bar with the text 'Search folders...' and a magnifying glass icon, followed by '1 folders selected'. Below the search bar is a tag 'Engage X'. At the bottom, there is a checked checkbox 'Set a default template for Engage emails' and a dropdown menu showing 'Default Free Form Template' with a 'Choose' button next to it. At the very bottom, there is a small text instruction: 'Select a template that's available for 1:1 emails, and make sure that the right users have permission to access it.'

Allow for Classic or Lightning email templates, or both.

Prevent users from sending 1:1 emails to prospects who opted out of marketing emails.

Classic email templates are allowed by default.
(Do NOT set Email Builder template as a default.)



Enable Salesforce Engage

Pardot Settings > Account Settings > Edit > Expand Salesforce Engage

— Salesforce Engage

Engage Campaign Limit

The max number of Engage Campaign emails that can be sent by an Engage user over a 24 hour period

Limits the number of Engage Campaign emails an Engage user can send over a 24-hour period.

Choose a number between zero and 500. 24-hour rollovers respect the user's timezone.



Salesforce Engage

Salesforce Engage can help

Salesforce Engage allow you to:

- Effortlessly build tailored campaigns with marketing-curated content
- Deliver a phenomenal buyer experience
- Close deals faster

With Engage emails you can:

- Send one-to-one or one-to-many emails directly from Salesforce
- Tailor email to your audience with editable text-only or marketing-approved templates
- Automatically track all email activities

Marketing templates

Choose a marketing template and it will populate in the email editor.

- Editable sections will be marked by an unlocked icon.
- Merge fields can be used in marketing templates

Want more templates?

- Talk to your marketing team
- Marketing creates the templates in Pardot so you can focus on selling

Basic Template Information

Name *

Tags

Folder *

Campaign *

Tracker Domain

We use this tracker domain to create the link to this asset

Email Type * HTML and Text
This email will be an HTML email with a text alternative.
 Text
This is a text only email.

Available for * One to one emails List emails
 Autoresponder emails Engagement Program Emails
Check all that apply

Templates created by marketing need to have "One to one emails" checked.

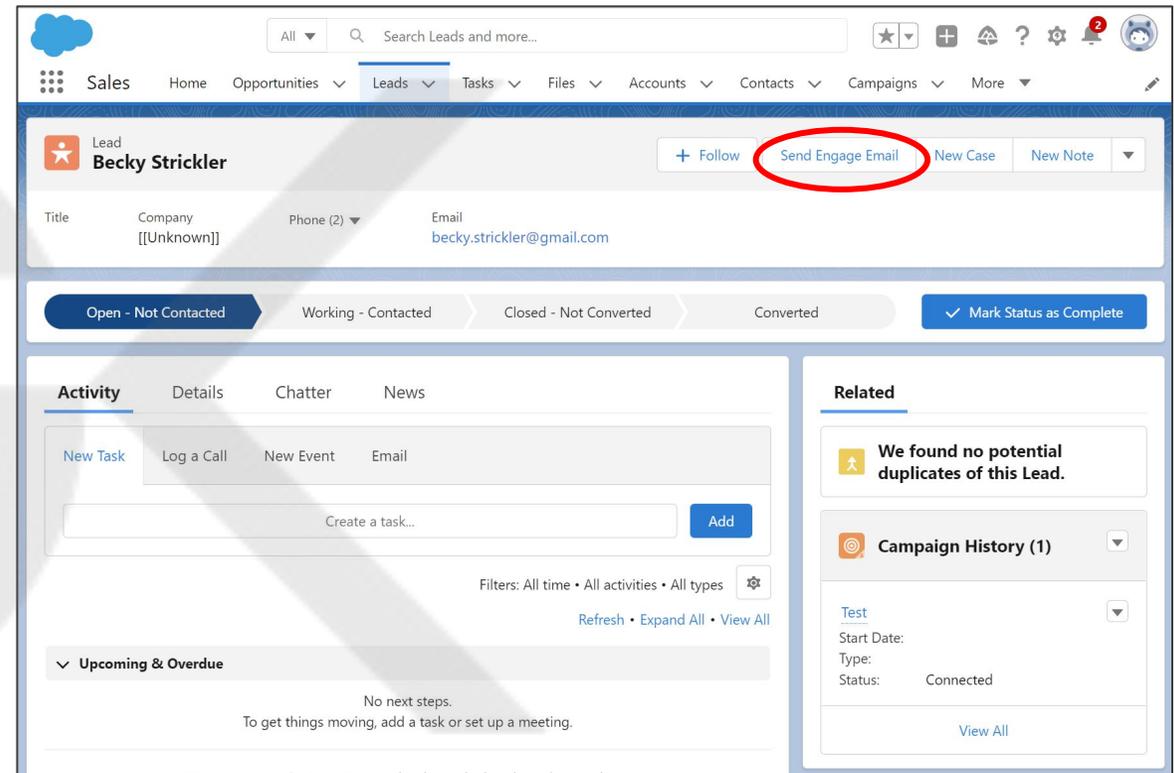


One-to-one Engage emails

Engage campaigns let you deploy your own personalized, one-to-one email campaigns:

1. Go to a Lead or Contact record
2. Click the Send Engage Email button to access the Engage email editor

Track email interactions on the Pardot Activities section of a record, or using real-time Engage Alerts.



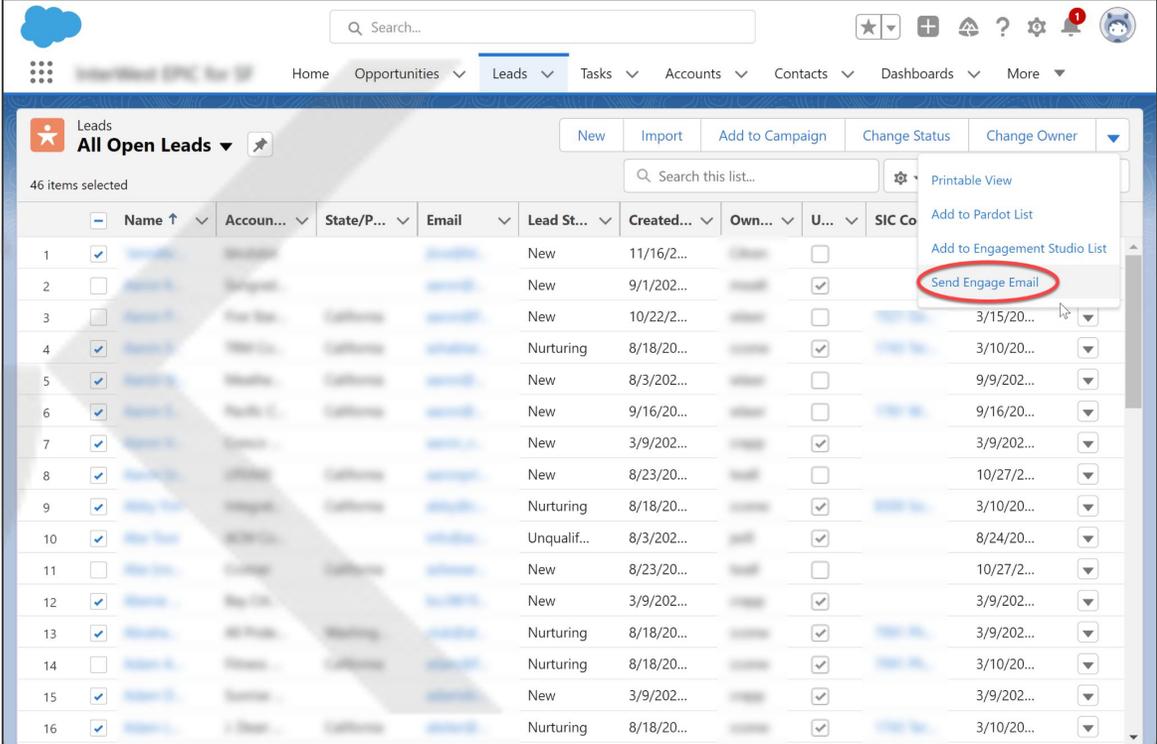
One-to-many Engage emails

Send targeted emails to groups of leads or contacts:

1. Go to the Lead or Contact tabs
2. Select or create a List View
3. Click the Send Engage Email button to access the Engage email editor

Pro-Tip: Create targeted List Views of your database for easy Engage sends. *Think: lists for upsell, cross-sell, regional and competitive campaigns.*

Note: Each user has a daily Engage email sending default limit of 500 emails that is set up by your Pardot administrator.



The screenshot displays the Pardot interface for managing leads. At the top, there is a search bar and navigation tabs for Home, Opportunities, Leads, Tasks, Accounts, Contacts, Dashboards, and More. The main content area shows a list of 46 items selected under the 'All Open Leads' view. The list includes columns for Name, Account, State/P..., Email, Lead St..., Created..., Own..., U..., and SIC Co. A context menu is open over the list, showing options like 'Printable View', 'Add to Pardot List', 'Add to Engagement Studio List', and 'Send Engage Email', which is circled in red. The table data is as follows:

	Name	Account	State/P...	Email	Lead St...	Created...	Own...	U...	SIC Co
1	<input checked="" type="checkbox"/>				New	11/16/2...		<input type="checkbox"/>	
2	<input type="checkbox"/>				New	9/1/202...		<input checked="" type="checkbox"/>	
3	<input type="checkbox"/>				New	10/22/2...		<input type="checkbox"/>	
4	<input checked="" type="checkbox"/>				Nurturing	8/18/20...		<input checked="" type="checkbox"/>	
5	<input checked="" type="checkbox"/>				New	8/3/202...		<input type="checkbox"/>	
6	<input checked="" type="checkbox"/>				New	9/16/20...		<input type="checkbox"/>	
7	<input checked="" type="checkbox"/>				New	3/9/202...		<input checked="" type="checkbox"/>	
8	<input checked="" type="checkbox"/>				New	8/23/20...		<input type="checkbox"/>	
9	<input checked="" type="checkbox"/>				Nurturing	8/18/20...		<input checked="" type="checkbox"/>	
10	<input checked="" type="checkbox"/>				Unqualif...	8/3/202...		<input checked="" type="checkbox"/>	
11	<input type="checkbox"/>				New	8/23/20...		<input type="checkbox"/>	
12	<input checked="" type="checkbox"/>				New	3/9/202...		<input checked="" type="checkbox"/>	
13	<input checked="" type="checkbox"/>				Nurturing	8/18/20...		<input checked="" type="checkbox"/>	
14	<input type="checkbox"/>				Nurturing	8/18/20...		<input checked="" type="checkbox"/>	
15	<input checked="" type="checkbox"/>				New	3/9/202...		<input checked="" type="checkbox"/>	
16	<input checked="" type="checkbox"/>				Nurturing	8/18/20...		<input checked="" type="checkbox"/>	

How to add Send Engage Emails to List views

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
Contact

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Search Layouts for Salesforce Classic

Hierarchy Columns

Triggers

Validation Rules

Search Layouts
5 Items, Sorted by Layout

Quick Find

LAYOUT	COLUMNS DISPLAYED	BUTTONS DISPLAYED	
List View	N/A	Open in Quip, New From Document, New, Add to Campaign, Clean, Import, Add to Campaign, Add to Call List, Send List Email, Send Message, Printable View, Add to Pardot List, Add to Engagement Studio List, Send Engage Email	▼
Lookup Dialogs	Name, Account Name, Account Site	N/A	▼
Lookup Phone Dialogs	Name, Account Name, Account Site, Phone, Mobile, Home Phone, Other Phone, Asst. Phone, Account: Phone	N/A	▼
Search Filter Fields	N/A	N/A	▼
Tab	Name, Account Name, Phone	N/A	▼

To add Send Engage email to List View, go to Search Layouts for Salesforce Classic and choose **Edit**

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
Contact

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

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Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Search Layouts for Salesforce Classic

Hierarchy Columns

Triggers

Edit Search Layout
Contacts List View

Customize the buttons on the Contacts list view:

- To remove any standard buttons, remove the check next to the standard button name.
- To add custom buttons, select them and click Add.

Standard Buttons

- Open in Quip [OpenListInQuip]
- New From Document [NewFromDocument]
- New [NewContact]
- Add to Campaign [AddToCampaign]
- Clean [ListClean]
- Import [Import]
- Add to Campaign [MassAddToCampaign]
- Add to Call List [MassCreateCallList]
- Send List Email [SendListEmailAction]
- Send Message [SendBulkMessageAction]
- Printable View [PrintableListView]
- Add to Pardot List [MassAddToList]
- Add to Engagement Studio List [MassAddToNurtureList]

Custom Buttons

Available Buttons

--None--

Selected Buttons

Send Engage Email

Add

Remove

Up

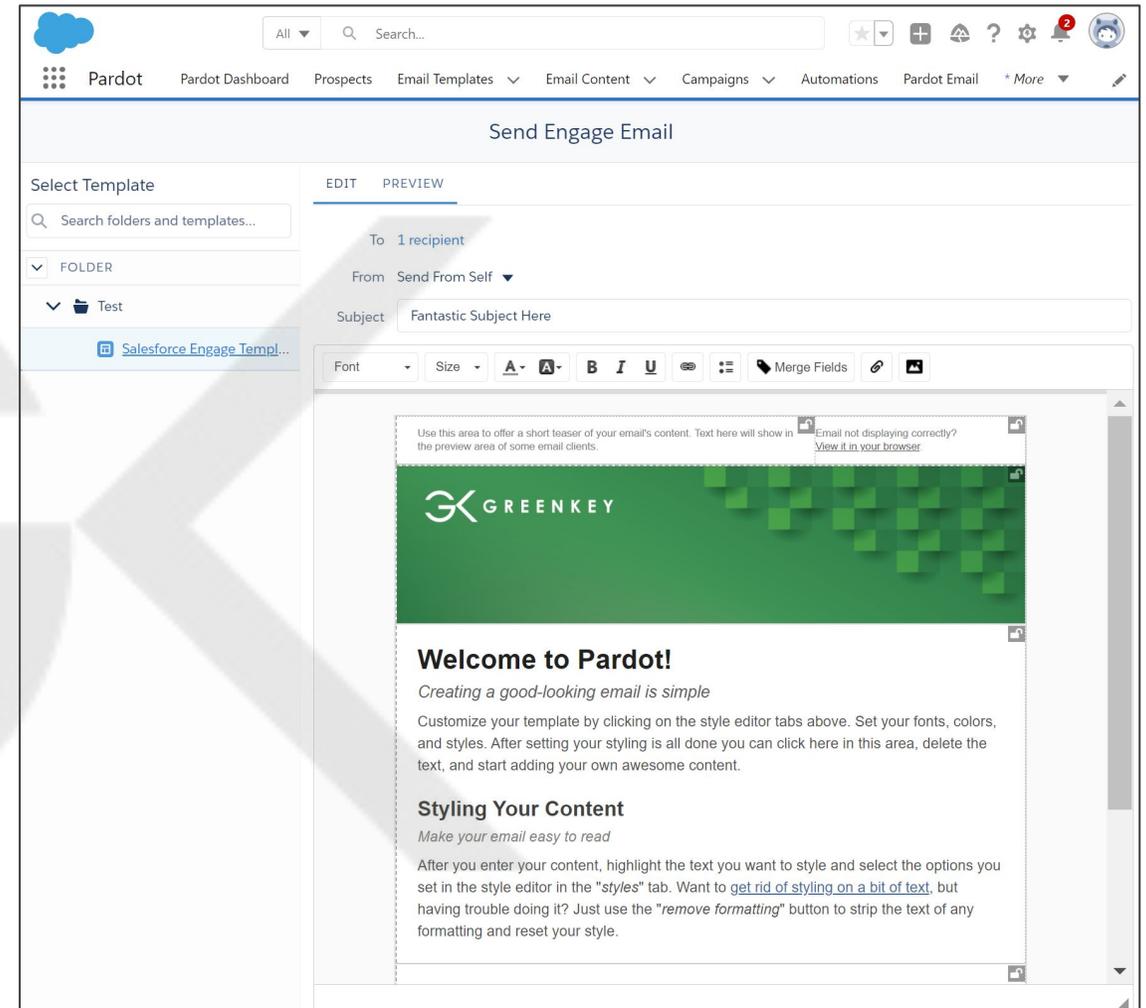
Down

Choose Send Engage Email

Email editor

The email editor lets you create personalized messages on the fly.

- Select a predefined template on the left-hand side
- Create a new email using the blank email draft on the right

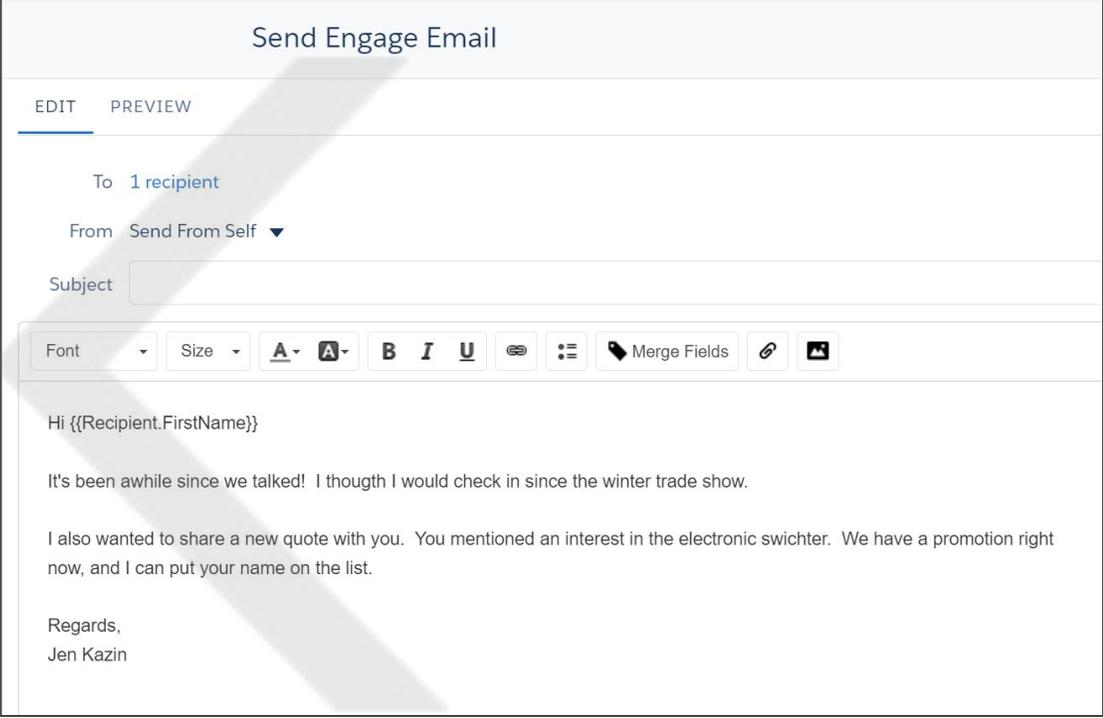


Merge fields

Merge fields personalizes your emails by pulling information from fields on the Lead or Contact record.

Merge fields will appear as `{{Recipient.FirstName}}` within the editor.

To preview as a recipient, select a name within the **Preview > Preview As** dropdown.



The screenshot displays the 'Send Engage Email' interface. At the top, there are 'EDIT' and 'PREVIEW' tabs. Below the tabs, the email details are shown: 'To 1 recipient', 'From Send From Self', and a 'Subject' field. A rich text editor toolbar is visible, containing options for font, size, bold, italic, underline, link, and a 'Merge Fields' button. The email body text is as follows:

Hi `{{Recipient.FirstName}}`

It's been awhile since we talked! I thought I would check in since the winter trade show.

I also wanted to share a new quote with you. You mentioned an interest in the electronic swichter. We have a promotion right now, and I can put your name on the list.

Regards,
Jen Kazin

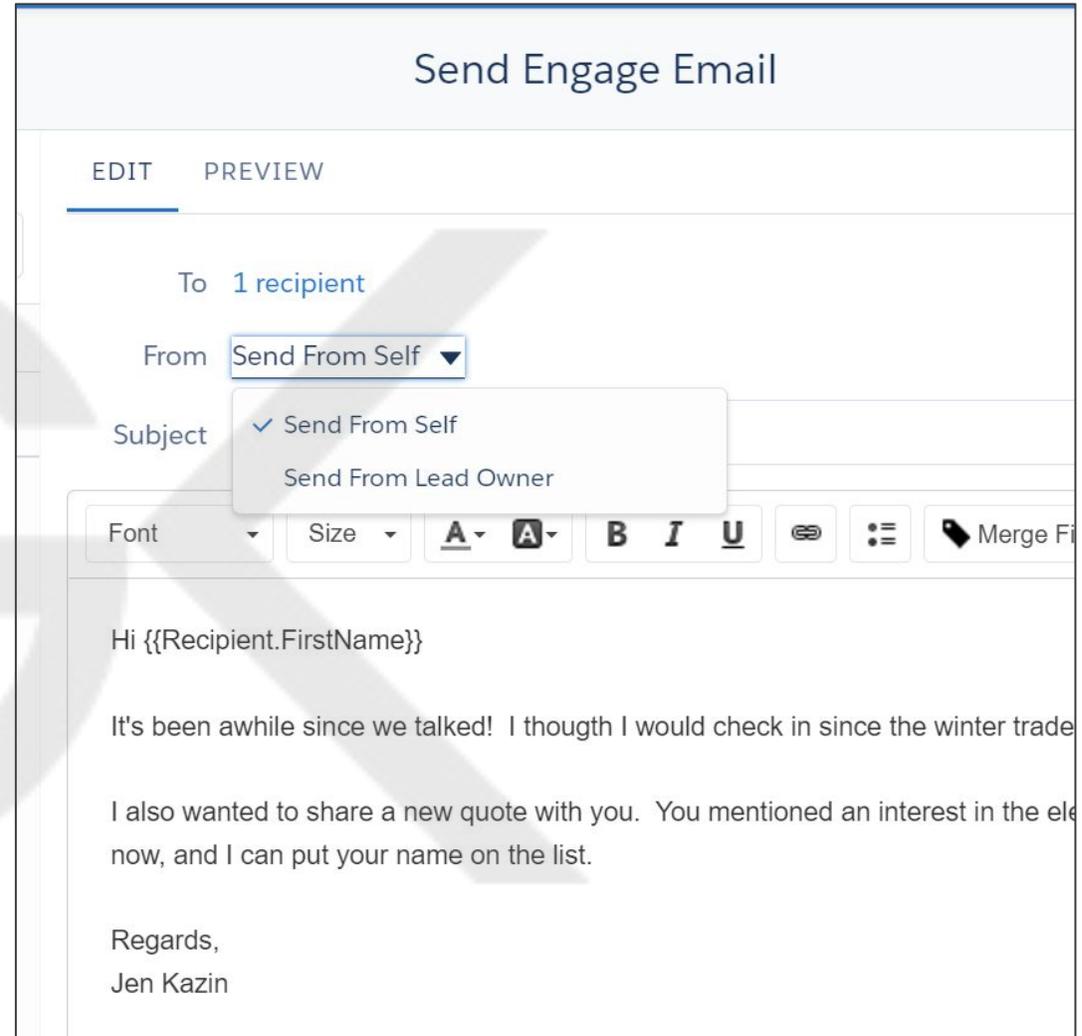
Delegated sending

Engage delegated sending lets you send campaigns from yourself, the record owner, or the account owner.

To select the sender:

1. Click into the **From** field and select the appropriate sender

Your sending options are dependent on your Engage settings. Talk to your Pardot administrator if you don't see the same options on your screen.



The screenshot shows the 'Send Engage Email' interface. At the top, there are tabs for 'EDIT' and 'PREVIEW'. Below the tabs, the 'To' field shows '1 recipient'. The 'From' field is set to 'Send From Self' with a dropdown arrow. A dropdown menu is open, showing two options: 'Send From Self' (selected with a checkmark) and 'Send From Lead Owner'. Below the dropdown, there is a rich text editor with a toolbar containing 'Font', 'Size', 'A', 'A', 'B', 'I', 'U', a link icon, a list icon, and a 'Merge Fields' icon. The email content starts with 'Hi {{Recipient.FirstName}}', followed by a paragraph: 'It's been awhile since we talked! I though I would check in since the winter trade', another paragraph: 'I also wanted to share a new quote with you. You mentioned an interest in the ele now, and I can put your name on the list.', and ends with 'Regards, Jen Kazin'.

Engage Emails

Sales will get notifications about their Engage emails.

Send Engage Email

[EDIT](#) [PREVIEW](#)

 182 recipients you selected are unmailable and have been removed from the list. [Show removed recipients](#)

 7 of the recipients you selected don't have an email address listed, [find out why](#).

 Can't send email to more than 200 recipients. Remove some recipients.

Send from Salesforce Campaigns & Opportunities

Send from Engage Campaigns is great for sending event invites or targeted marketing promos.

Send from Opportunities sends all contacts related to a specific opportunity or a targeted list view of specific deals.

NOTE: A common issue is sales doesn't like to send Engage emails from the list views. They either want to create their own list (not based on list view criteria) or they don't want to painstakingly send 50 Engage emails at a time.

Encourage those sales people to use campaigns. They can then keep their own "list" as campaign members. The salesperson can add or remove Leads or Contacts as needed. Or, marketers can populate the campaigns with a segmentation rule.

I've also seen sales split their lists with campaigns. If their Engage limit is 500, but they have 700 names, sales will use campaign#1 with 500 names for Engage emails on Monday and campaign#2 with 200 names for Engage emails on Tuesday.



Campaign **Send List Email** **Edit** **Delete**

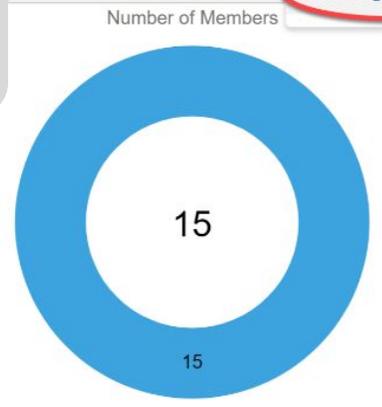
Type	Status	Start Date	End Date
	In Progress		

Details Engagement Related

Campaign Name		Campaign Owner	
Active	<input checked="" type="checkbox"/>	Status	In Progress
Parent Campaign		Start Date	
Type		End Date	
Description			
Planning			
Num Sent in Campaign	0	Budgeted Cost in Campaign	
Expected Response (%)	0.00%	Actual Cost in Campaign	
Campaign Statistics			
Responses in Campaign	15	Opportunities in Campaign	0
	15	Won Opportunities in Campaign	0

Send emails to leads or contacts added as campaign members in campaign object.

- Clone
- Child Campaign
- View Campaign Hierarchy
- Send Engage Email**



Campaign Hierarchy (0)

Campaign Member Statuses (2)

javascript:void(0);

Sending from Opportunity List Views

Use List Views to target opportunities that meet specific criteria, like your biggest deals, deals in a certain stage, upsell deals, and more.

To send an Engage Campaign from an Opportunity List view:

- Create your list view, select opportunities to include in the campaign, then click the Send Engage Email button.
- All Contact Roles for all selected opps will be added as recipients.
- You can remove recipients from the list if you don't want to include everyone.

Search...

Home Opportunities Leads Tasks Accounts Contacts Dashboards Engage Alerts Engage Reports Engage Team Reports

Opportunities **All Opportunities** 47 items selected

New Printable View **Send Engage Email**

Send emails to contacts added as contact roles on opportunities.

	Description ↑	Stage	Account Name	Record ...	Created Date	Pr...	New/Rene...	Le...	La...
1	✓	Closed Lost			6/29/2021, 2:57 PM	0%	New Business		
2	□	Closed Lost			6/29/2021, 2:57 PM	0%	New Business		
3	□	Closed Lost			6/29/2021, 2:57 PM	0%	New Business		
4	✓	Closed Lost			6/29/2021, 2:57 PM	0%	New Business		
5	✓	Closed Lost			6/29/2021, 2:57 PM	0%	New Business		
6	✓	Closed Lost			6/29/2021, 2:57 PM	0%	New Business		
7	✓	Closed Won			6/29/2021, 2:57 PM	100%	New Business		
8	✓	Prospecting			6/29/2021, 2:57 PM	15%	New Business		
9	□	Information Gathering			3/23/2022, 2:04 PM	25%	New Business		
10	✓	Prospecting			6/29/2021, 2:57 PM	15%	New Business		
11	✓	Information Gathering			6/29/2021, 2:57 PM	25%	New Business		
12	✓	Prospecting			6/29/2021, 2:57 PM	15%	New Business		
13	✓	Prospecting			6/29/2021, 2:57 PM	15%	Renewal Business		
14	✓	Information Gathering			8/17/2021, 2:07 PM	25%	New Business		
15	✓	Information Gathering			9/8/2021, 3:57 PM	25%			
16	✓	Presentation			6/29/2021, 2:57 PM	60%	New Business		

Guidelines for sending Engage emails

- When an Engage email has 10 or more recipients, Pardot places an unsubscribe tag (%%unsubscribe%%) in the body of the email. If you remove this tag, you can't send the email.
- Pardot doesn't send one-to-many emails to prospects that have opted out or are marked as Do Not Email. These prospects can still receive one-to-one emails.
- If you send an email to a lead or contact without a corresponding prospect record in Pardot, Pardot creates a record.
- Any template in Pardot that is available for 1:1 emails is available for Engage Campaigns.
- Users can view all templates marked for 1:1 emails that are in any folder they have permissions to view. If your Pardot edition doesn't include folder permissions, users can browse all folders that contain email templates marked for 1:1 use.
- The From address is the logged-in Pardot user's email address or the lead, contact, or account owner's email address (when using delegated sending). Engage emails override the sender specified in the email template.
- To use Salesforce Files in Engage Campaigns, enable Content Deliveries and Public Links for users.
- Files uploaded from the Engage editor are saved as Salesforce files under Owned by Me.
- Only those Salesforce files that are shared via a link (in Salesforce Classic) or have a public link (Lightning Experience) are available to choose in the Engage editor.

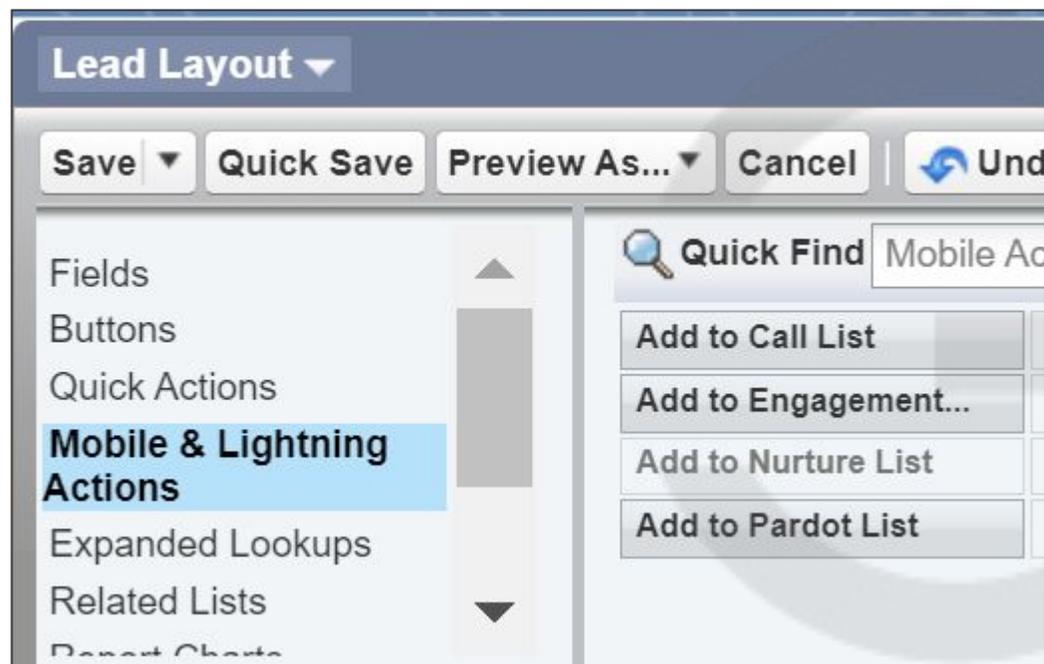
Engagement Programs

Engagement programs are a series of emails sent to your prospects over a prolonged period of time.

- Add Leads or Contacts to marketing-approved engagement programs.
- This can be done from your desktop or mobile device!

Talk to your marketing team about common follow-tasks or programs you'd like to automate. They could be a great fit for a nurture! *Think: 30-day nurtures, event follow-ups and cold lead re-engagements.*

Engagement Programs - What's the difference?



Add to Engagement Program - Will add prospect to any lists are are attributed to an Engagement Program.

Add to Pardot List - Will add prospect to any lists are "CRM visible," including engagement program lists.

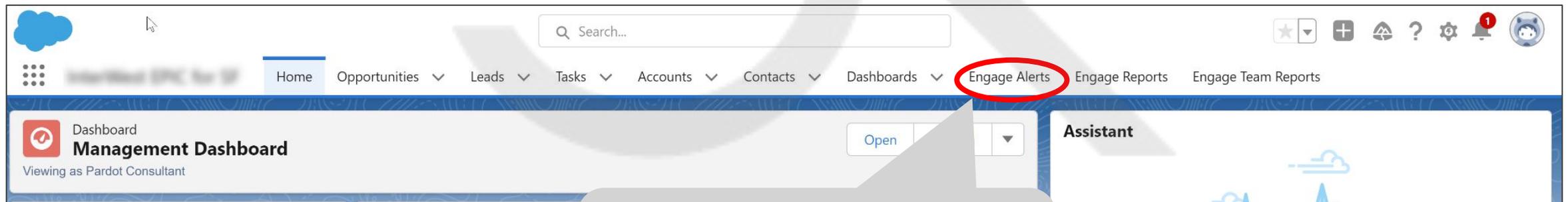
Add to Nurture List - This is a legacy feature. Use the two choices above.



Engage Alerts

Engage Alerts

Engage Alerts notify sales of prospect engagement.



Engage alerts show all engagement (from marketing or Engage emails).

Engage Alerts

Customize your column to view only certain activities.

- Customize an existing column by clicking on the pencil icon on the right side of the column
- If no activity type or geographic region is selected, all criteria will be included.
- Add a new column by clicking on the +Add New Column button

TIP: Customize your columns to focus on the purchasing activities that are most relevant to your sales cycle and your role. *Think: page views for BDRs, form fills for SDRs, file downloads and email clicks for AE's.*

Edit Column

Column Name
My Leads and Contacts

Leads and Contacts Criteria

All leads and contacts

Only my assigned leads and contacts

Identified company website visitors that have not been matched with a lead or contact

Activity Criteria

** If no activity criteria is selected, all activity will be included.*

<input type="checkbox"/> Page Views	<input type="checkbox"/> Forms	<input type="checkbox"/> Email Clicks
<input type="checkbox"/> File Downloads	<input type="checkbox"/> Webinars and Events	<input type="checkbox"/> One to One Email Opens
<input type="checkbox"/> Paid Search Clicks	<input type="checkbox"/> Site Search	<input type="checkbox"/> All Email Opens

Geographic Criteria

** If no geographic criteria is selected, all locations will be included.*

Add a group of countries
Select country group

Add an individual country
Select country

Add a state or province
Select state

Cancel Save

Don't filter by email opens anymore.



Engage Alerts

Email Clicks



Prospect Name
[Redacted]

Email Click 13 hrs 11 mins ago

Prospect Name
[Redacted]

Email Click 13 hrs 13 mins ago

Prospect Name
[Redacted]

Email Click 13 hrs 56 mins ago

Website Tracking



Prospect Name
[Redacted]

Email Open 3 hrs 6 mins ago

Prospect Name
[Redacted]

Email Open 3 hrs 59 mins ago

Prospect Name
[Redacted]

Email Open 5 hrs 51 mins ago

Prospect Name
[Redacted]

Email Open 5 hrs 58 mins ago

Identified Companies



Prospect Name
[Redacted]

Page View 9 hrs 39 mins ago

Prospect Name
[Redacted]

Page View 13 hrs 16 mins ago

Prospect Name
[Redacted]

Page View 13 hrs 30 mins ago

Prospect Name
[Redacted]

Page View 14 hrs 36 mins ago

Use multiple columns to track different types of engagement.

You can pause the alerts if you get overwhelmed with notifications.

Edit or delete columns.

The most recently active prospects are at the top.

Columns show up to 100 prospect activities from the last four days.

The screenshot shows the Salesforce Engage Alerts interface. At the top, there is a navigation bar with the Salesforce Engage logo and menu items: Home, Leads, Contacts, Engage Alerts (selected), and Engage Reports. Below the navigation bar, the main content area is titled 'Engage Alerts'. It is divided into two columns: 'My Leads and Contacts' and 'Identified Companies'. The 'My Leads and Contacts' column contains two stacked cards. The top card is for 'Sally Jensen', with details: 'Unknown', 'Standard', 'Form Success', and '2 days 19 hrs ago'. The bottom card is for 'Edna Frank', with details: 'GenePoint', 'Standard', 'Form Success', and '2 days 19 hrs ago'. The 'Identified Companies' column shows 'No alerts for this column found'. A callout box points to the stacked cards with the text: 'Stacked cards means that prospect has multiple activities.'

Click on the card to see score and Engagement History for the last seven days.

Score: 3 

 Engagement History (3)

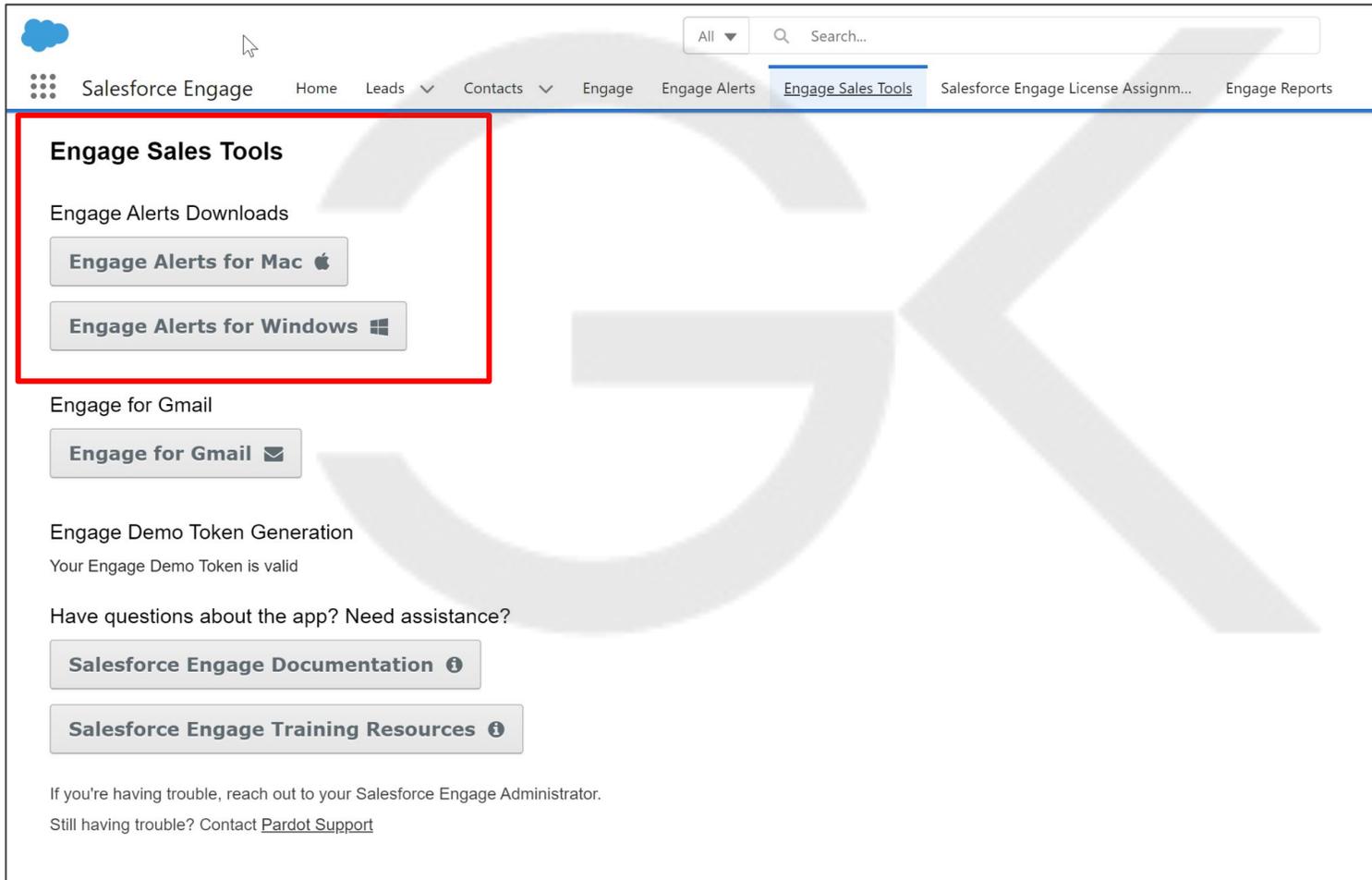
-  **Email Open** 14 hrs 11 mins ago
Email: [redacted]
Type: Engage Campaign
-  **Tracked Link Clicked** 14 hrs 11 mins ago
Email: [redacted]
Link: [redacted]
-  **Email Sent** 14 hrs 23 mins ago
Email: [redacted]

[Close](#)

Engage Alerts Desktop

Engage Alerts Desktop lets users get real-time lead and contact activity notifications right from their desktop. It works exactly like Engage Alerts in browsers, with the benefit of popup notifications.

Engage Alerts Desktop



The screenshot displays the Salesforce Engage desktop interface. At the top, there is a navigation bar with the Salesforce logo, a search bar, and menu items: Home, Leads, Contacts, Engage, Engage Alerts, Engage Sales Tools (highlighted), Salesforce Engage License Assignm..., and Engage Reports. Below the navigation bar, the main content area is titled "Engage Sales Tools" and is enclosed in a red rectangular box. This section contains several options:

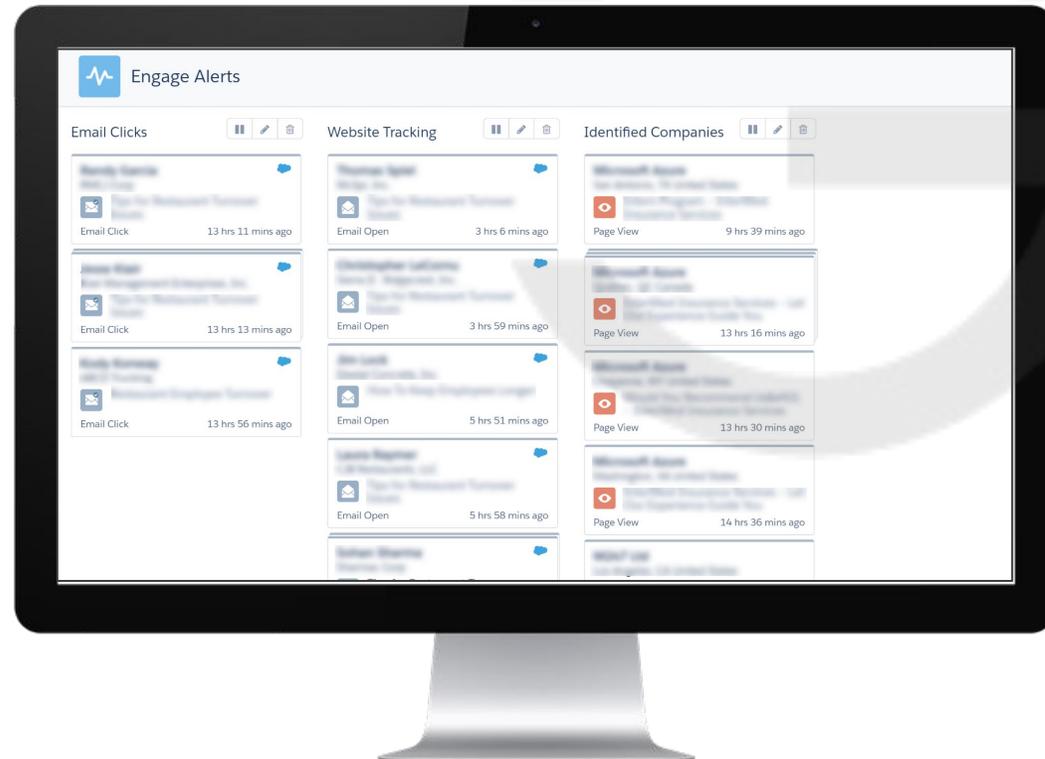
- Engage Alerts Downloads**
 - Engage Alerts for Mac 
 - Engage Alerts for Windows 
- Engage for Gmail
 - Engage for Gmail 
- Engage Demo Token Generation
 - Your Engage Demo Token is valid
- Have questions about the app? Need assistance?
 - Salesforce Engage Documentation 
 - Salesforce Engage Training Resources 

At the bottom of the page, there is a note: "If you're having trouble, reach out to your Salesforce Engage Administrator. Still having trouble? Contact [Pardot Support](#)".

Sales can see pop up notifications while working on other projects.

Engage to-go

Engage is available with mobile app!

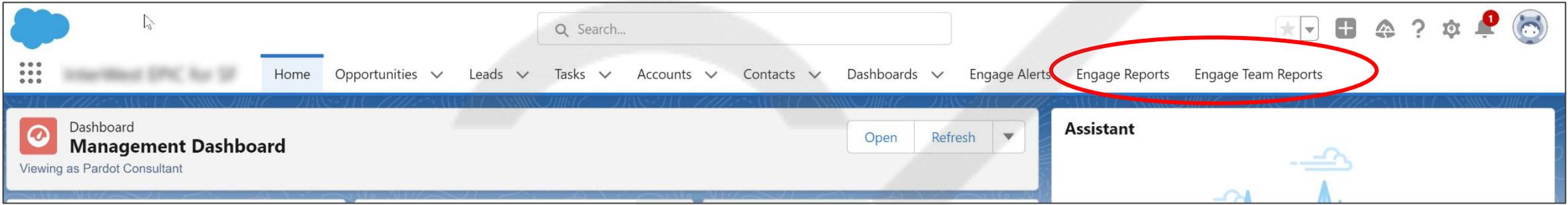


Filters save across platforms.





Engage Reporting



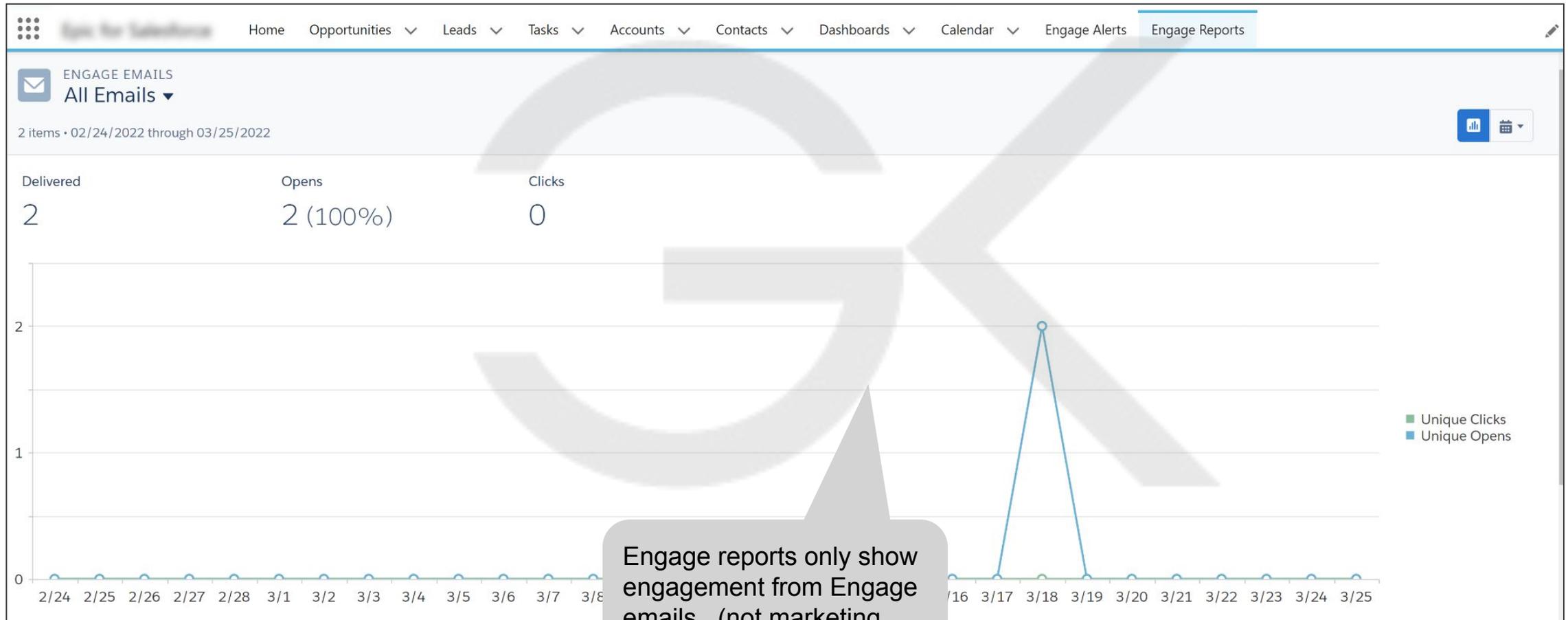
The image shows the top navigation bar of the Salesforce Pardot Management Dashboard. The navigation menu includes: Home, Opportunities, Leads, Tasks, Accounts, Contacts, Dashboards, Engage Alerts, Engage Reports, and Engage Team Reports. The 'Engage Reports' and 'Engage Team Reports' items are circled in red. Below the navigation bar, the main content area is partially visible, showing a 'Management Dashboard' header with 'Viewing as Pardot Consultant' and an 'Assistant' section.

Engage Reporting

Engage Reports - Engage user can see how leads and contacts interact with their Engage emails.

Engage Team Reports - Managers can see team Engage email usage and impact.

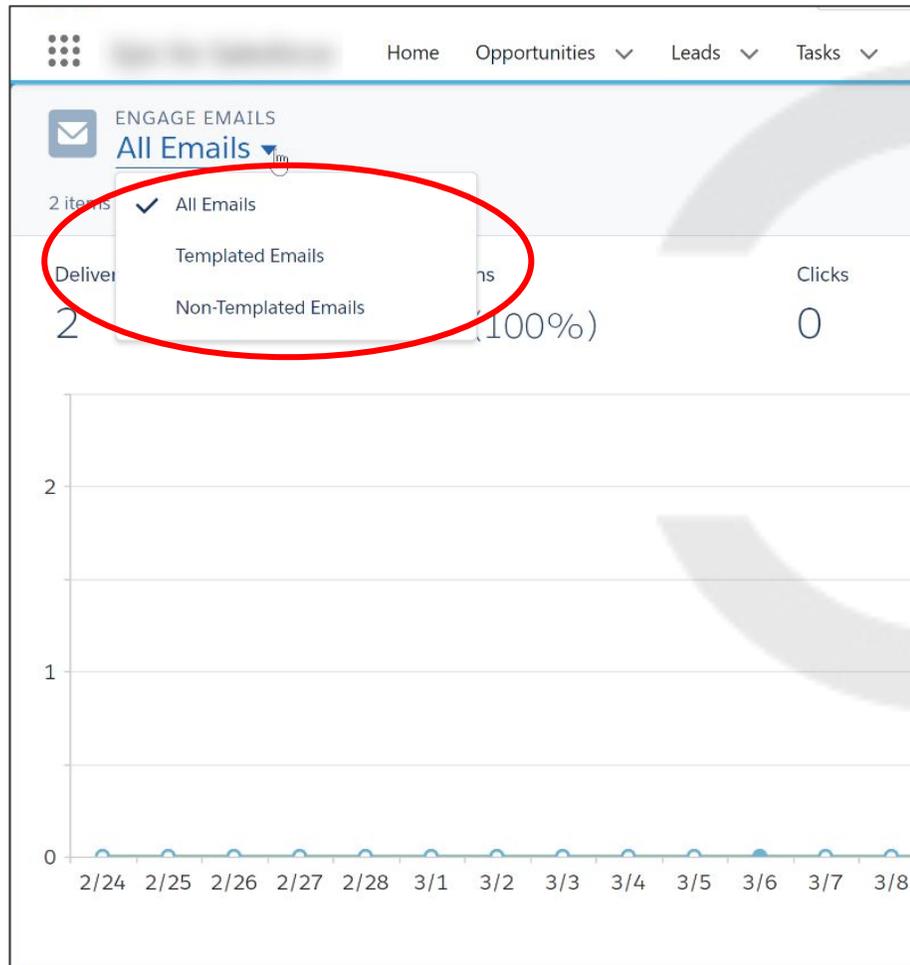
Engage Reports



Engage reports only show engagement from Engage emails. (not marketing emails).



Engage Reports



All Emails Filter

The All Emails filter highlights in a graph the unique opens and clicks for all emails during the period.

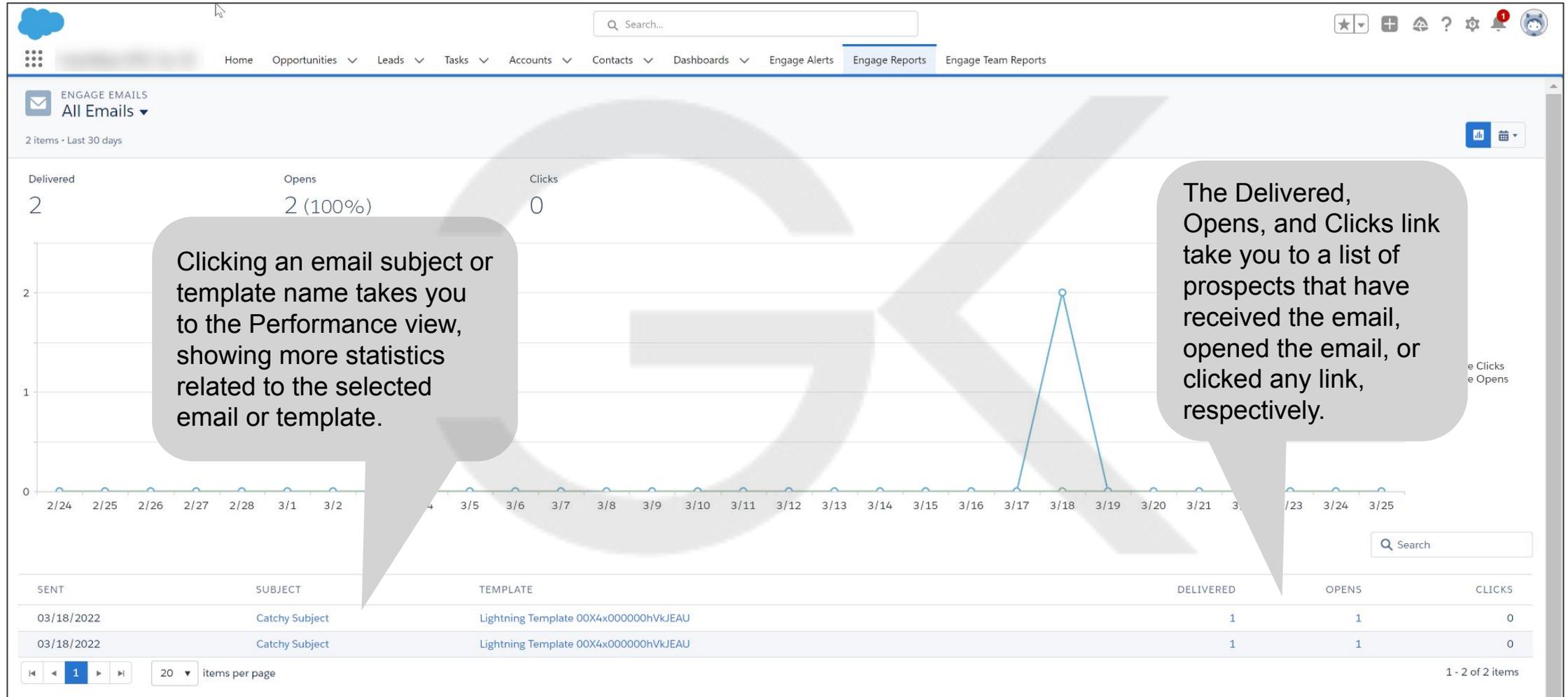
Templated Emails Filter

The Top Templates graph shows the top-five performing templates for the selected timeframe, based on opens.

Non-Template Emails Filter

The Non-Templated Emails graph highlights unique opens and clicks, total opens, total clicks, and the clickthrough rate for all non-templated emails during the specified period.

Engage Reports

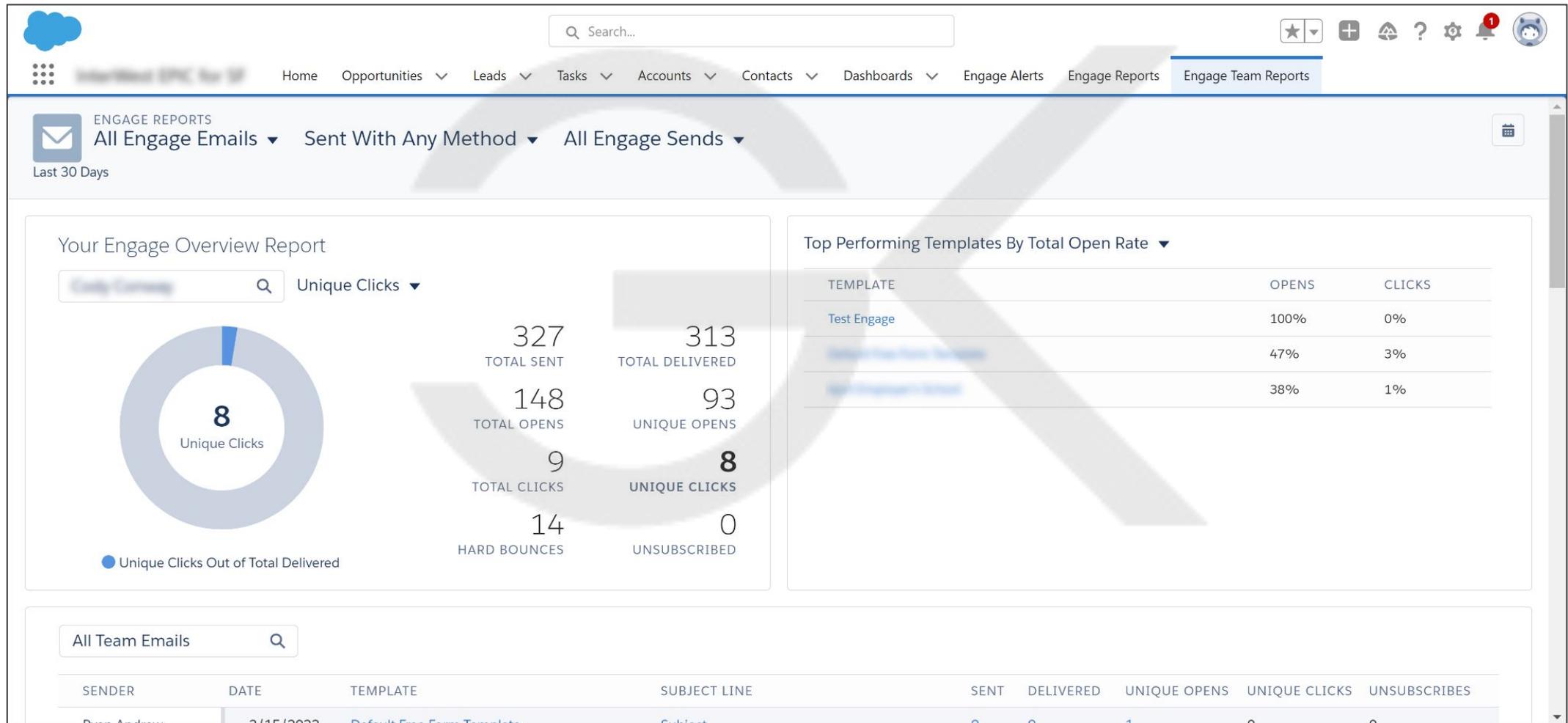


Clicking an email subject or template name takes you to the Performance view, showing more statistics related to the selected email or template.

The Delivered, Opens, and Clicks link take you to a list of prospects that have received the email, opened the email, or clicked any link, respectively.



Engage Team Reports



Engage Team Reports

The screenshot shows the Salesforce Engage Team Reports dashboard. At the top, there is a navigation bar with a search box and various menu items. Below this, the main content area is divided into several sections. On the left, there are summary cards for 'All Engage Emails' and 'Sent With Any Method', with three dropdown menus highlighted by red circles. A callout box points to these dropdowns, stating: 'Use the dropdowns to filter your reports to the exact level of detail.' In the center, there are two columns of metrics: 'TOTAL SENT' (327), 'TOTAL DELIVERED' (313), 'TOTAL OPENS' (148), 'UNIQUE OPENS' (93), 'TOTAL CLICKS' (9), 'UNIQUE CLICKS' (8), 'HARD BOUNCES' (14), and 'UNSUBSCRIBED' (0). A donut chart shows '8 Unique Clicks' out of the total delivered. On the right, there is a table titled 'Top Performing Templates By Total Open Rate' with columns for 'TEMPLATE', 'OPENS', and 'CLICKS'. A callout box points to the table, stating: 'Pick the hyperlinked text to drill further into the data.' At the bottom, there is a table with columns for 'SENDER', 'DATE', 'TEMPLATE', 'SUBJECT LINE', 'SENT', 'DELIVERED', 'UNIQUE OPENS', 'UNIQUE CLICKS', and 'UNSUBSCRIBES'. A search box for 'All Team Emails' is also present.

Use the dropdowns to filter your reports to the exact level of detail.

Use the date picker to narrow your reporting to a specific time period.

Pick the hyperlinked text to drill further into the data.

TEMPLATE	OPENS	CLICKS
Test Engage	100%	0%
	47%	3%
	38%	1%

SENDER	DATE	TEMPLATE	SUBJECT LINE	SENT	DELIVERED	UNIQUE OPENS	UNIQUE CLICKS	UNSUBSCRIBES
Dev Andrew	3/15/2022	Default Free Form Template	Subject	0	0	1	0	0



SETUP

Permission Sets

Permission Set Assignments

Pardot Consultant

Save

Cancel

Available Permission Sets

- Analytics View Only User
- Engage Reports (Connector User)

Add



Remove

Enabled Permission Sets

- B2B Marketing Analytics
- Engage Reports (End User)
- Sales Cloud User
- Salesforce Engage
- Use CMS with Email Templates and Email Conte

Add permission sets to the appropriate people to grant access to Engage Team reports.

Save

Cancel

Considerations for Engage Team Reports

- Your **user role hierarchy** in Salesforce determines what the My Team's Engage Sends filter shows. If your admin has changed sharing settings of custom objects in the Team Reports package, this filter doesn't work as expected.
- Editing or deleting reports in the Engage Reports folder breaks Engage Team reports. To customize a report, make a copy.
- You don't need an Engage license to use Team Reports.
- The Send Engage Email button works only for users with an Engage license.
- Reports data created from the team reports objects counts toward your data storage limits in Salesforce.
- The custom objects created in the Engage Team Reports package do not count toward your custom object limits for your Salesforce edition.
- The Engage Reports folder is set to private by default.
- We recommend that you assign the connector user the View Setup and Configuration permission. This permission makes it easier for our support team to troubleshoot issues.
- Template data includes only stats from Engage sends. It does not include data from other Pardot emails, such as list emails and engagement programs.
- For email unsubscribes and opt-outs, Engage Team Reports show the total number of times a prospect clicked unsubscribe or opt-out. This number can differ from Email Template Reports, which show a maximum of one unsubscribe or opt-out per prospect.

Why should sales care?

BE FIRST

“**50%** of sales go to the rep that responds first.”

-InsideSales.com

BE RELEVANT

“**78%** of customers expect sales representative to personalize interactions based on information from their online activities”

-IDC

BE PRODUCTIVE

“High-performing sales teams are **4.5X** more likely to have a 360 degree view of their customers than underperformers.

-Salesforce

Getting Started with Salesforce Engage

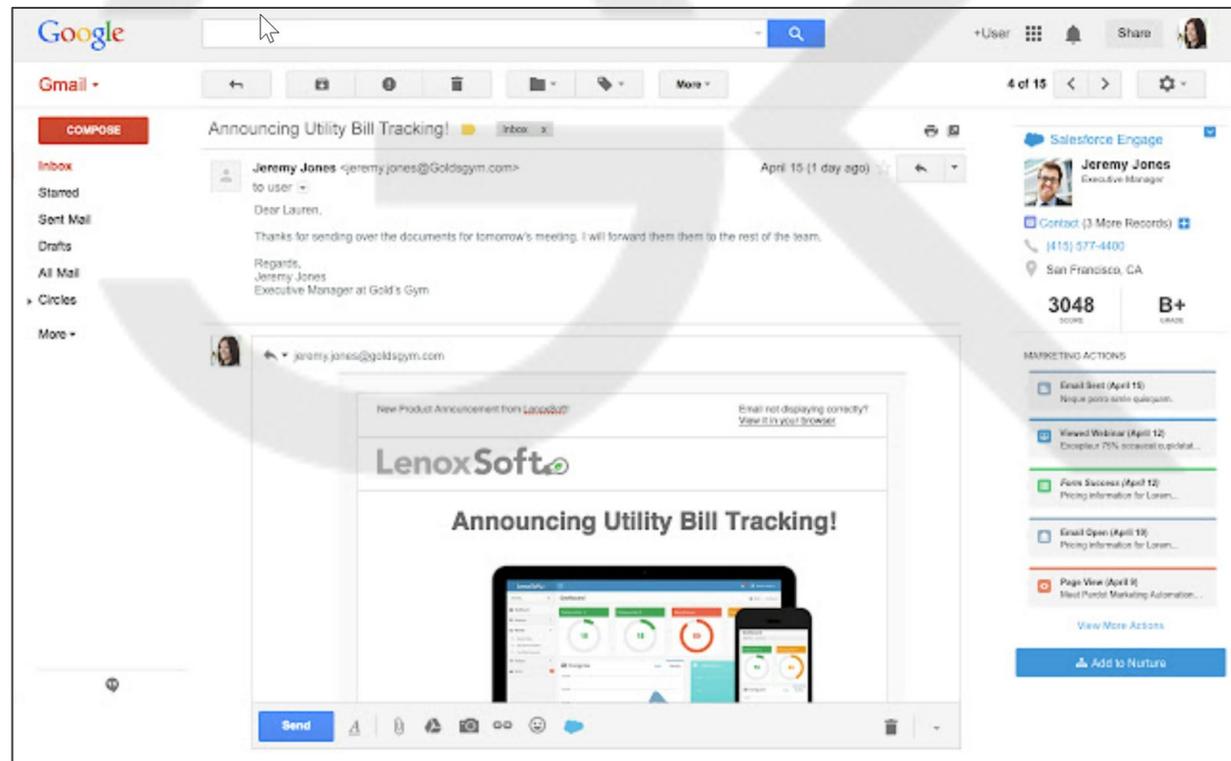
1. **List Views** - Create list views that will help your team prioritize their Salesforce Engage sends. Use them to target leads, contacts, accounts or opportunities.
2. **Engage Emails** - Encourage your sales user to send their first Engage email as part of their normal routine.
3. **Engage Nurture Programs** - Set up an Engagement Studio program in Pardot that helps your sales team.
4. **Engage Reports** - Look at Engage Team reports to see what went well and what could be improved for next time.
5. **Engage Alerts** - Make sure your reps are using Alerts to prioritize prospects and gather data.



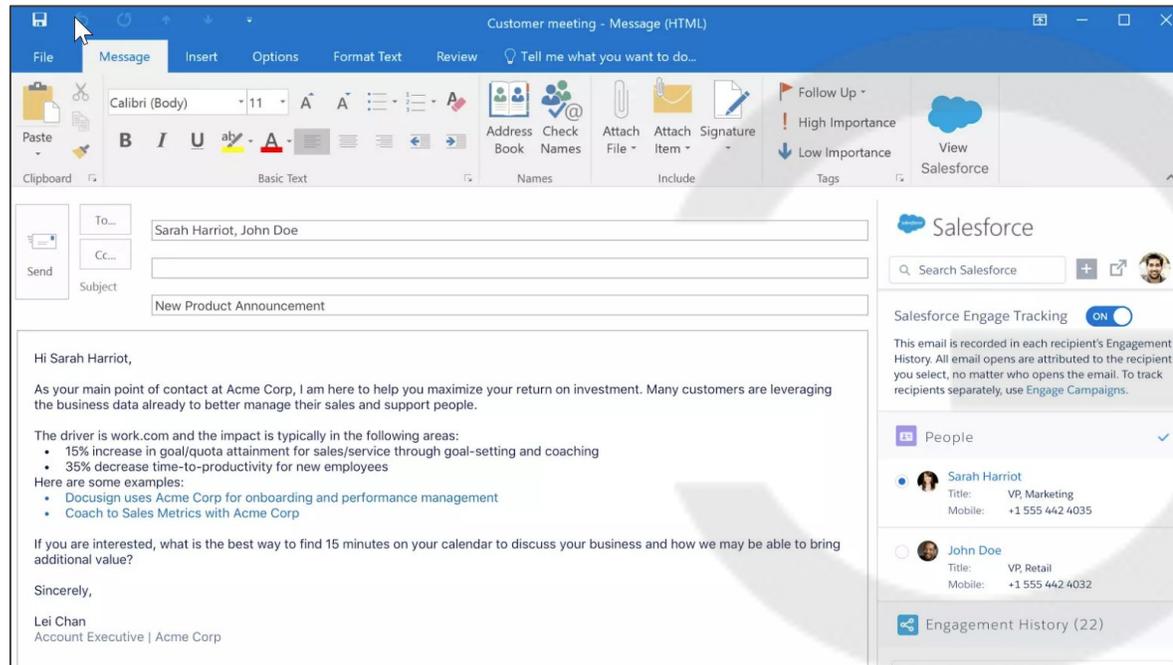
Engage for Gmail or Outlook

Engage for Gmail

Engage for Gmail is a Chrome extension that lets Salesforce Engage users send trackable emails directly from Gmail.



Engage for Outlook



Engage for Outlook lets Salesforce Engage users work from their inbox and track opens and sends on emails sent through Outlook.

To use Engage for Outlook, the Outlook integration must be enabled in your org, but it is supported for users on Salesforce Classic and Lightning Experience.



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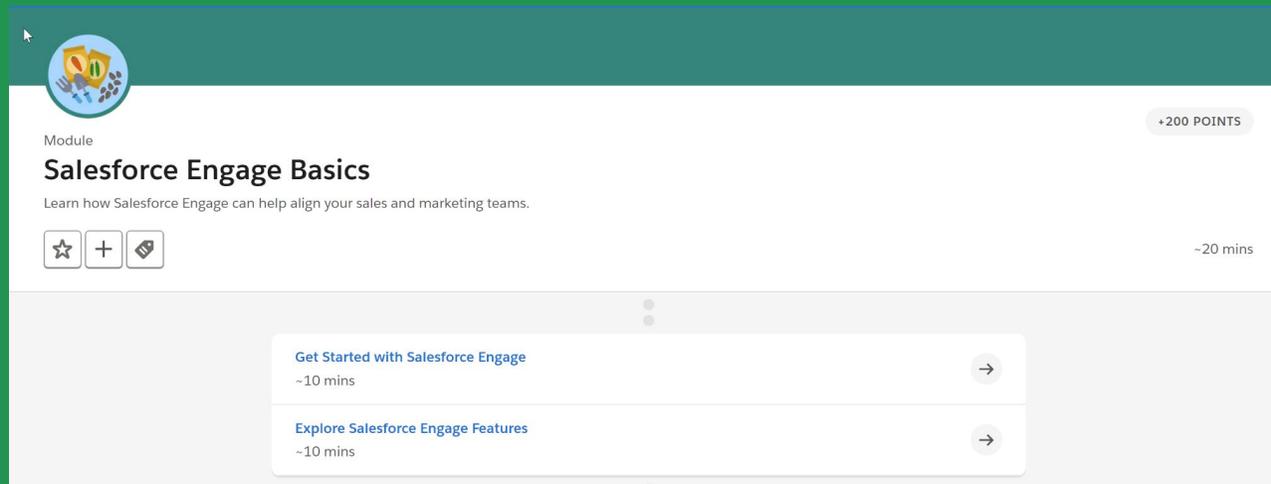
-Salesforce

Getting Started

Here are some steps to get started with Engage

1. **List Views** - Create list views that will help your team prioritize their Salesforce Engage sends. Use them to target leads, contacts, accounts or opportunities.
2. **Engage Emails** - Encourage your sales user to send their first Engage email as part of their normal routine.
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Want more?



The screenshot shows a Trailhead module page for 'Salesforce Engage Basics'. At the top left is a circular icon with a shield and a plus sign. Below it, the word 'Module' is written in small text. The main title 'Salesforce Engage Basics' is in a larger, bold font. To the right of the title is a badge that says '+200 POINTS'. Below the title is a subtitle: 'Learn how Salesforce Engage can help align your sales and marketing teams.' Underneath the subtitle are three icons: a star, a plus sign, and a document. To the right of these icons is a timer icon and the text '~20 mins'. At the bottom of the page, there is a list of two tasks, each with a right-pointing arrow: 'Get Started with Salesforce Engage ~10 mins' and 'Explore Salesforce Engage Features ~10 mins'.

TRAILHEAD:

<https://trailhead.salesforce.com/en/content/learn/modules/salesforce-engage-basics>

Engage Documentation

https://help.salesforce.com/s/articleView?id=sf.pardot_salesforce_engage.htm&type=5

SALESFORCE HELP > DOCS > MARKET TO YOUR CUSTOMERS WITH PARDOT

Salesforce Engage

Salesforce Engage lets marketing share its content with sales to boost your company's selling power. Sales reps can use marketing-approved email templates to contact prospects at the right moment and track the effectiveness of the messages in Salesforce.

REQUIRED EDITIONS

Available in: All Pardot editions with Salesforce Engage

Available in: Professional, Enterprise, Performance, Unlimited, and Developer Editions

- **Set Up Salesforce Engage**
Configure Salesforce Engage for your company. To complete setup, you need a Salesforce admin and a Pardot admin.
- **Engage Campaigns**
Engage Campaigns let you quickly send targeted emails to groups of leads and contacts, and then track engagement metrics from Salesforce.
- **Engage for Gmail**
Engage for Gmail is a Chrome extension that lets Salesforce Engage users send trackable emails directly from Gmail.
- **Engage for Outlook**
Engage for Outlook lets Salesforce Engage users work from their inbox and track opens and sends on emails sent through Outlook.
- **Engage Alerts and Engage for the Salesforce App**
Engage Alerts and Engage for the Salesforce app are real-time services that inform you about prospect activity. Match prospects based on criteria, and display them in a card-based view. Some basic filters come predefined. However, you can create your own filters to display the most relevant prospects.
- **Engage Reporting**
Engage reporting lets each Engage user track how leads and contacts interact with their Engage Campaigns. Sales managers, marketers, and admins can report on team Engage email usage and impact.

THANK YOU!

