

Marketing Cloud Account Engagement (Previously Pardot) Integration

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In this Article

[Overview](#)

[Requirements](#)

[Set Up Marketing Cloud Account Engagement Form Handling](#)

[Set Up HTTPS Connector](#)

[HTTPS Connector Mappings](#)

[Checkboxes](#)

Related Articles

Overview

FormAssembly's [HTTPS connector](#) ensures quick delivery of marketing notifications along with accurate and timely scoring and data processing for the [Marketing Cloud Account Engagement](#) (previously referred to as Pardot) marketing automation system and Salesforce.

You may want to pass form data through Account Engagement before it's sent to Salesforce, or you may prefer to have data simultaneously sent to both. Regardless of which you prefer, you can customize FormAssembly's connectors to best fit your marketing workflow needs.

The HTTPS Connector is particularly useful as a way to pass leads to Account Engagement drips, automations, and triggers before sending them to Salesforce and setting them as Sales Qualified, rather than having all leads sent straight to Salesforce before qualifying them.

Note: If you are running into processing errors while using the REST API publishing method, please try using one of our other [publishing methods](#).

Requirements

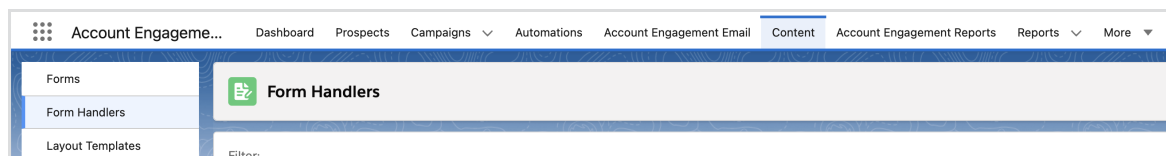
You'll need a

- FormAssembly [HTTPS Connector](#)
 - FormAssembly Essentials plan and higher, or legacy Professional and Premier plans
 - [Marketing Cloud Account Engagement subscription](#)
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Set Up Marketing Cloud Account Engagement Form Handling

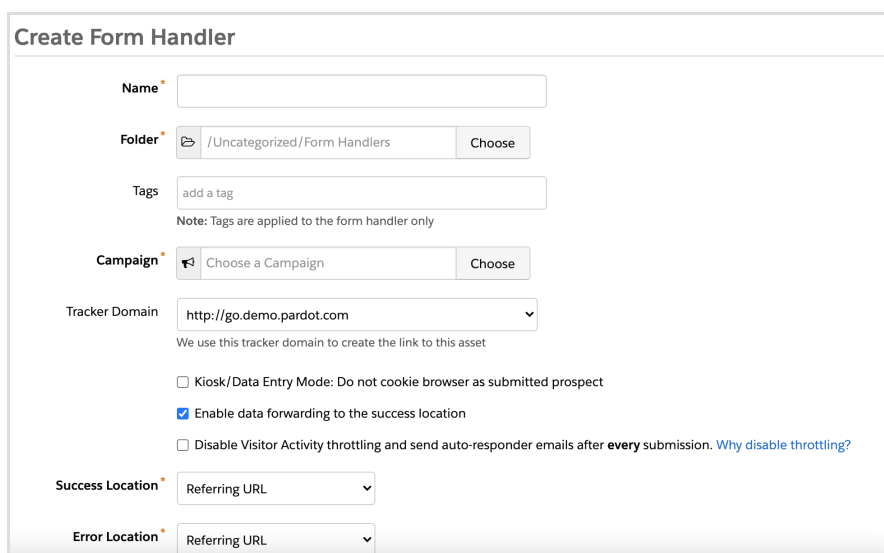
1) Add or Select Form Handler

Access the Form Handlers tab in your Account Engagement dashboard by selecting Content > Forms > Form Handlers.



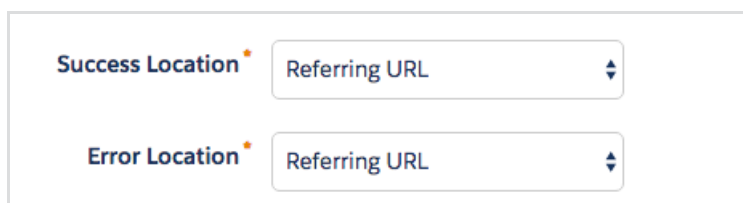
Choose an existing Form Handler from the list or click **Add Form Handler** to create a new one.

2) Configure Form Handler

A screenshot of the 'Create Form Handler' configuration form. It includes the following fields and options:

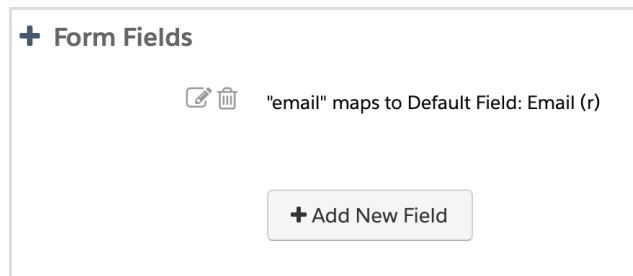
- Name**: A text input field.
- Folder**: A dropdown menu showing '/Uncategorized/Form Handlers' with a 'Choose' button.
- Tags**: A text input field with 'add a tag' placeholder. Below it is a note: 'Note: Tags are applied to the form handler only'.
- Campaign**: A dropdown menu with 'Choose a Campaign' and a 'Choose' button.
- Tracker Domain**: A dropdown menu showing 'http://go.demo.pardot.com'. Below it is a note: 'We use this tracker domain to create the link to this asset'.
- Options**: Three checkboxes:
 - Kiosk/Data Entry Mode: Do not cookie browser as submitted prospect
 - Enable data forwarding to the success location
 - Disable Visitor Activity throttling and send auto-responder emails after every submission. [Why disable throttling?](#)
- Success Location**: A dropdown menu showing 'Referring URL'.
- Error Location**: A dropdown menu showing 'Referring URL'.

Fill in the required fields (name, folder, and campaign). Check **"Enable data forwarding to the success location"**—this is required for the connector to function correctly.

A close-up screenshot of the 'Success Location' and 'Error Location' dropdown menus. Both are set to 'Referring URL'.

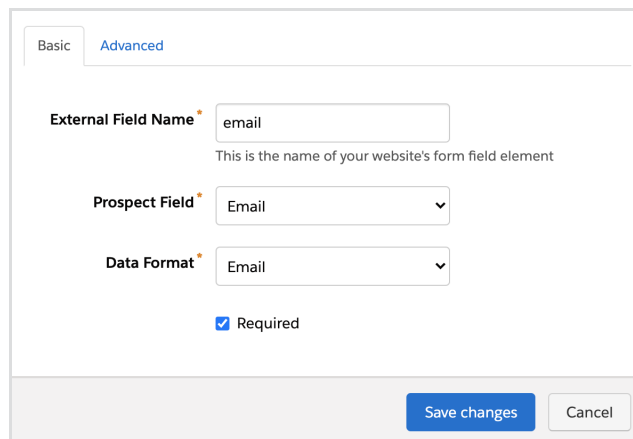
Set both the Success and Error locations to "Referring URL." This will preserve FormAssembly's user experience when redirecting a user from your form or if there are validation errors for a submission.

3) Map Form Fields

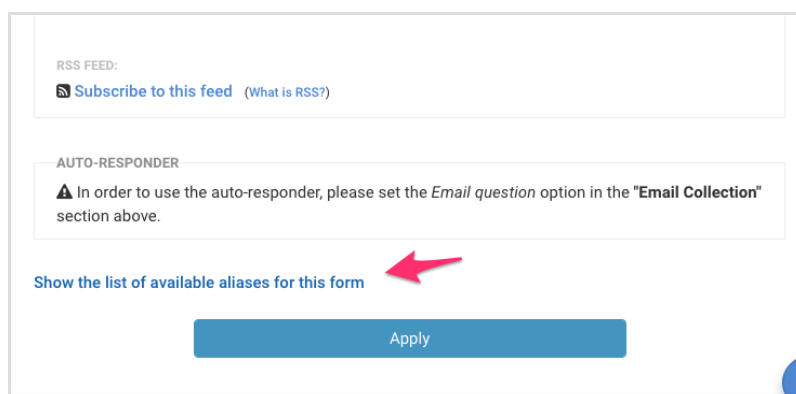


Click **Add New Field** to map any form fields that you'd like to pass to Account Engagement fields. At a minimum, you'll want to make sure you've mapped "email" to your Account Engagement email field using the following settings. This is a standard field that cannot be changed to take any different value and must remain named "email".

Note: The field name, "email", is case-sensitive. You'll need to use "email" instead of "Email", "EMail", or "EMAIL".



To add the other fields from your form, you'll need to retrieve their [field aliases](#), which will primarily take the form "tfa_XXX." You can view the field aliases for your form via the link at the bottom of the form's Notifications page in FormAssembly.



Field Aliases	
ALIAS	FORM FIELD
Contact Information	
tfa_1	First Name
tfa_3	Last Name
tfa_5	Email Address
tfa_17	I would like to receive email updates
tfa_18	- I would like to receive email updates

In Account Engagement, **click Add New Field** in the Form Handler Setup to add a new field. A pop-up menu will appear with field options:

The screenshot shows a configuration window for adding a new field. It has two tabs: 'Basic' and 'Advanced'. Under the 'Basic' tab, there are three main fields: 'External Field Name' with a text input containing 'tfa_1' and a subtext 'This is the name of your website's form field element'; 'Prospect Field' with a dropdown menu showing 'First Name'; and 'Data Format' with a dropdown menu showing 'Text'. Below these is a 'Required' checkbox which is checked. At the bottom right, there are two buttons: 'Save changes' (in blue) and 'Cancel' (in grey).

The External Field Name will be the field alias for the FormAssembly form field you're passing to Pardot. The Prospect Field is the Account Engagement field where you want to receive the form field's data. The Data Format will either be "Text," "Number," or "Email."

Click "Save changes" to save a field and add it to your Form Handler.



4) Save and Review Form Handler

Click "Create Form Handler" or "Save Form Handler" once you've finished adding fields.

Summary	
Name	Form Handler Test
Folder	■ /Uncategorized
Campaign	Test Campaign
Tracker Domain	http://go.demo.pardot.com
Endpoint URL	http://go.demo.pardot.com//319493/2021-11-10/6qc9ss <input type="button" value="http"/> <input type="button" value="https"/>
Success Location	Referring Url
Error Location	Referring Url
Data Forwarding	<input checked="" type="checkbox"/>
Tags	

You'll be taken to the Summary screen, where you can review your configuration. Select and copy the Form Handler's **Endpoint URL** from the Summary screen—you'll need it to set up your HTTPS Connector.

Set Up HTTPS Connector

Add the HTTPS Connector

Navigate back to your Forms List in FormAssembly. Select the form you'd like to use with Account Engagement in your Forms List. Click **Configure** and select **Connectors**.

Click to add a new connector in the **After Form Submitted** position of your Connector Timeline and choose HTTPS Connector.

Enable and Configure HTTPS Connector

1. Enable the connector
2. Paste the Endpoint URL of the Form Handler you copied from Pardot into the Remote Script URL input field.
3. Leave HTTP Request Method set to POST and HTTP Authentication unchecked

HTTPS Connector Mappings

Map your form fields to match the external field names you set up in your Pardot form handler.

Remember that your email field should be mapped as "email." Click **Save** at the bottom of the HTTPS connector configuration page to save the connector's settings.

Checkboxes

Checkboxes are set up a bit differently when sending data from the HTTPS Connector to Account Engagement.

In this example, tfa_2 is a checkbox field called Attend with two options, "Yes" and "No". You'll need to use either True/False or 1/0 in the connector setup to send this data to a checkbox field in Account Engagement.

YOUR FORM FIELDS:	WILL BE SUBMITTED AS... (FIELD NAME)
First Name	tfa_1
Attend	tfa_2
Show choice mapping	
Yes	True
No	False
Email	tfa_5
