Webhook and Marketing Cloud Account Engagement

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Overview

FormAssembly's Webhook 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 Webhook 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.
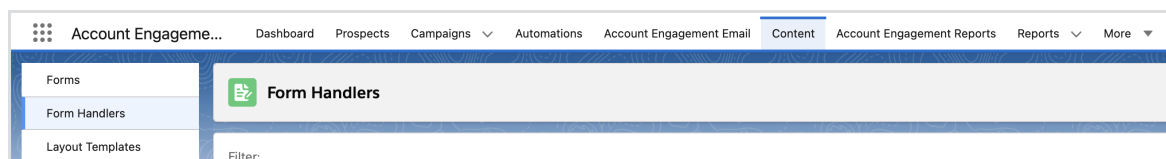
Requirements

You'll need a

- FormAssembly Webhook Connector
- FormAssembly Teams plan and higher
- Marketing Cloud Account Engagement subscription

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

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.

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:

Basic	Advanced

External Field Name *   `tfa_1`

This is the name of your website's form field element

Prospect Field *   First Name ⬍

Data Format *   Text ⬍

☑ Required

Save changes   Cancel

The External Field Name will be the field alias for the FormAssembly form field you're passing to Marketing Cloud Account Engagement. 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.


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 Webhook Connector.

Set Up Webhook Connector

In the workflow builder, add the form you want to link with Salesforce Account Engagement to the workflow, and then add a connector step.

Add the Webhook Connector

Go to the Connector step and select the Webhook connector
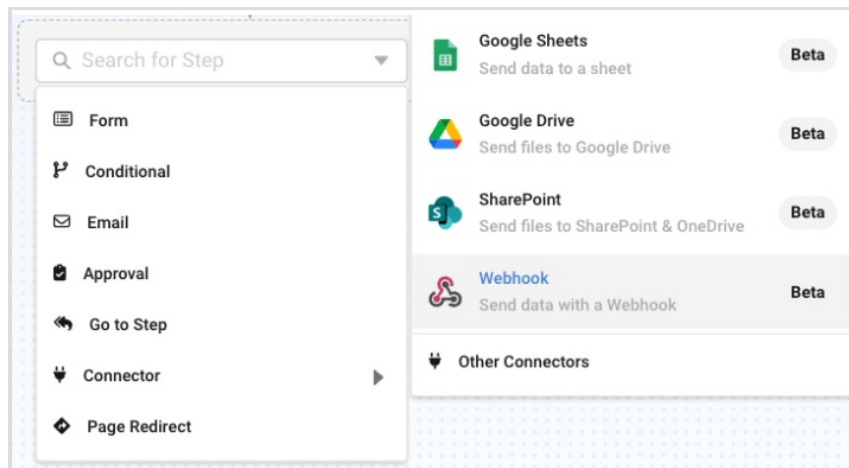
In the Authorization tab, you can select '**None**' as it's not needed. With this integration, you are simply sending the data to the endpoint URL.

In the Configuration tab, select **POST** as the method, and then paste in the **Endpoint URL** obtained from the Salesforce Marketing Cloud Account Engagement form handler that you set up above. Custom Headers will be left blank in this instance.

Within the **Body** section, you will select '**Form Data**' as the Content Type, and map your form fields to match the external field names you set up in your Marketing Cloud Account Engagement form handler.

Remember that your email field should be mapped as "email."

Checkboxes

Checkboxes are set up a bit differently when sending data from the Webhook 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