



## 360 SMS Pardot Integration

Pardot’s primary method of integrating with native Salesforce is via its “Completion Action” feature whereby a web hit or form completion or any other Pardot action can among many completion actions “Create Salesforce Task” for the given Contact or Lead.

To send an outbound SMS as a Pardot action, one need only create a process builder on the creation of a specified task. In the example, below we ask that the Pardot administrator create Salesforce Tasks with the syntax:

**Subject** = Send SMS (any fields or combination of fields can be used this just )

**Description** = an SMS Template Id (created via the 360 SMS Templates). Note that the Template OBJECT must match either a Lead or Contact if it contains specific object merge tags.

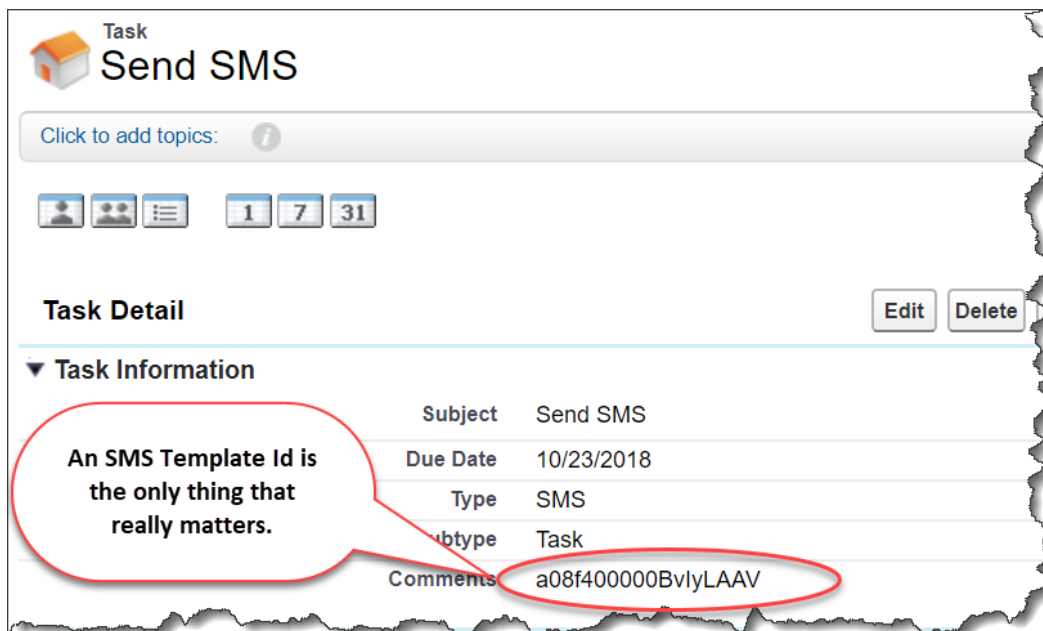


Figure 1 - Pardot creates Salesforce Task via Completion Actions

Below are the screen captures of the very simple Task object Process Builder.

Note particularly, the method of determining if the TASK is hooked to a Contact or a Lead. Because Salesforce uses a polymorphic Whold (label NameId or Name) field to hold either a Contact or Lead Id, the only reliable method of determining whether the SMS should be sent to a Contact or Lead is to inspect the first 3 characters of the Whold. **003** is the prefix for a Contact object and **00Q** indicates the Lead object (those are zero’s not the letter o).



In the criteria, the subject or any other field can be used as the trigger criteria, the Pardot administrator and Salesforce administrator need only agree on the syntax.

Process Builder - Pardot - Task - SMS Trigger

Define Criteria for this Action Group

Criteria Name\* **Contact + Subject = Send SMS**

Criteria for Executing Actions\*

- Conditions are met
- Formula evaluates to true
- No criteria—just execute the actions!

Set Conditions

Field*	Operator*	Type*	Value*
[Task].Subject	Starts with	String	Send SMS
[Task].WhoId	Starts with	ID	003
[Task].Description	Is null	Boolean	False

Conditions\*

- All of the conditions are met (AND)
- Any of the conditions are met (OR)

**003 = Contact object**  
**00Q = Lead object**

Figure 2 - Criteria for triggering the Send SMS

Action Type\*  
Create a Record

Action Name\*  
Send SMS

Record Type\*  
Scheduled SMS

Set Field Values

Field*	Type*	Value*
Scheduled Sms Name	Field Reference	[Task].WhoId
Related Object Id	Field Reference	[Task].WhoId
Phone Api	String	MobilePhone
SMS Template	Formula	TRIM(LEFT([Task].Descri...

Insert: Field | Function | System Varia... | Operator

TRIM(LEFT([Task].Description,18)

Figure 3 - Send the SMS via one of the methods described in the Sending SMS via Process Builder



Update Records ?

Action Name\* i

Send SMS

Record\*

[Task].Name ID (Contact)

Criteria for Updating Records\*

Updated records meet all conditions

No criteria—just update the records!

Set new field values for the records you update

Field*	Type*	Value*
SMS Template	Formula	LEFT(TRIM([Task].Descri...)

+ Add Row

Figure 4 - Using the `Contact.SMS_Template (onChange)` method described in **Sending SMS via Process Builder** makes it even easier, as one need only set the `Contact` or `Lead.SMS_Template` field and the other process builder takes care of sending the SMS.

Note that Pardot has several other integration points with Salesforce such as the Pardot Score on the Lead and Contact objects as well as numerous other fields all of which could trigger an SMS via normal Contact or Lead Process Builders.

Pardot also creates Leads and Campaign Members via its Completion Actions. Again, these are simple Process Builders documented in the Sending SMS via Process Builder document.