



# Oracle Eloqua Campaigns

User Guide

# Contents

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<b>Campaigns</b> .....	<b>5</b>
<b>Creating multi-step campaigns</b> .....	<b>6</b>
<b>Creating simple email campaigns</b> .....	<b>12</b>
Changing an active simple email campaign .....	15
<b>A/B testing campaigns</b> .....	<b>17</b>
Before you start A/B testing .....	17
Creating an A/B testing campaign .....	18
Changing an active A/B test .....	21
About the results of an A/B test .....	21
Winning metrics and campaign performance .....	22
Choosing the winning email of an A/B testing campaign .....	23
<b>Setting up campaign notifications</b> .....	<b>25</b>
Notifying users when a contact enters a wait step .....	25
Notifying users about an ending campaign .....	27
<b>Configuring campaign details and financials</b> .....	<b>30</b>
<b>Activating multi-step campaigns</b> .....	<b>32</b>
About deactivating campaigns and Oracle Eloqua's retention policy .....	35
<b>Moving contacts through a program or campaign</b> .....	<b>37</b>
<b>Adding notes to campaigns and programs</b> .....	<b>39</b>
<b>Copying campaigns</b> .....	<b>40</b>
<b>Campaign templates</b> .....	<b>42</b>
Creating templates .....	42
Finding and using a template .....	44
Managing campaign template .....	44
<b>Deleting campaigns</b> .....	<b>46</b>

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<b>Campaign canvas elements</b> .....	<b>47</b>
Example of using elements in campaigns .....	47
Configuring campaign canvas elements: Audience .....	51
Configuring campaign canvas elements: Assets .....	55
Configuring campaign canvas elements: Decisions .....	64
Audience Split .....	78
Configuring campaign canvas elements: Actions .....	86
<b>Campaign reporting and metrics</b> .....	<b>98</b>
Accessing operational reports from a campaign .....	98
Overview of campaign operational reports .....	99
Understanding campaign performance metrics .....	101
SMS metrics .....	102
Email metrics .....	102
Stuck Records Report (All Canvases) .....	105
Exporting campaign entry or exit reports .....	106
Viewing the step members report .....	107
<b>Search for existing opportunities</b> .....	<b>110</b>
<b>Configuring opportunity settings</b> .....	<b>112</b>
<b>"Run as other user" for campaigns</b> .....	<b>117</b>
<b>Campaign approvals</b> .....	<b>120</b>
Configuring the campaign approvals workflow .....	121
Enabling campaign approvals for groups .....	123
Setting campaign activation permissions for new campaigns .....	129
Requesting campaign approval .....	134
Checking the approval status of campaigns .....	138
Approving or rejecting campaign stages .....	138
<b>Campaign activation security</b> .....	<b>142</b>
<b>Mobile campaign manager</b> .....	<b>143</b>

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Walkthrough .....	144
Installing mobile campaign manager .....	149
Scheduling a campaign with the mobile campaign manager .....	150
<b>External assets and activities .....</b>	<b>157</b>
Concepts and definitions .....	157
Creating external asset types and activity types .....	159
Uploading external activities .....	160
Viewing external activities on contact records .....	165
Editing external assets and activities .....	166

# Campaigns

 **Note:** We're updating our help center to reflect the new [Redwood experience](#). During the transition, some content reflects the previous version of the UI.

Campaigns are at the heart of Oracle Eloqua and marketing automation. Campaigns enable you to create dynamic, personalized, and unique journeys for your contacts.

You can create two types of campaigns:

- [Simple email campaigns](#) allow you send a single email to a group of contacts. Choose your segment, email, and when to send the message. A simple email campaign can also be used to [A/B test two emails](#).
- [Multi-step campaigns](#) allow you to create a highly customized marketing campaigns that can intrigue contacts and adapt based on a contact's real-time activities. Using a simple drag and drop UI, quickly build campaigns that engage the right audience at the right time in your customer's journey.

Of course you'll want to monitor your campaign's performance. Oracle Eloqua allows you to easily [access reports and performance metrics](#) right from the campaign canvas.

Learn more by [watching these videos](#)!

# Creating multi-step campaigns

A multi-step campaign is a highly customizable marketing tool. Simply add the elements of your campaign to the campaign canvas and then connect them to create your campaign flow.

[Learn more by watching the video.](#)

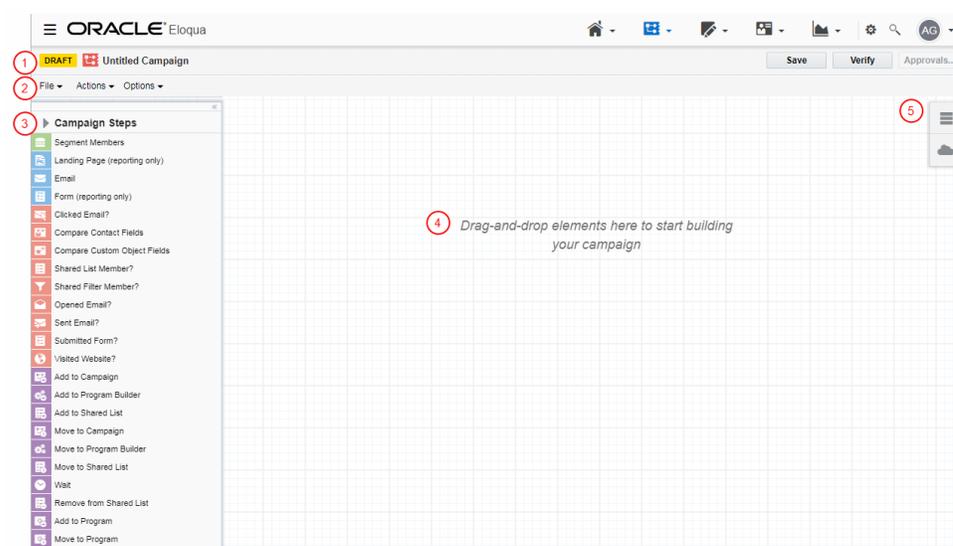
**Tip:** Looking to create a one-time batch email? Consider using a [simple email campaign](#) instead. This is an ideal way to send a single email to a group of contacts or conduct [A/B testing](#) on emails.

## Before you begin:

- Plan out your campaign. Document your campaign goals, target audience, key messages, and identify the appropriate channels to reach your audience. If you're not sure where to start, have a look at the [Best Practices templates](#) provided within Oracle Eloqua.
- Create all the assets (emails, forms, landing pages) required for your campaign. If you need to add something after [activating the campaign](#), that is OK. Just deactivate the campaign and make the changes you need. Keep in mind this [information about leaving a campaign deactivated for more than 3 months](#).
- If you want to be able to report on all of the form and landing page activity resulting from your campaign, be sure to add them to the campaign canvas. This allows you to attribute form submits and page visits back to the campaign. [Find out more about campaign reporting](#).
- Before activating your campaign, plan to test it first. This will catch typos, broken links, and ensure you're sending the right emails in your campaign flow.

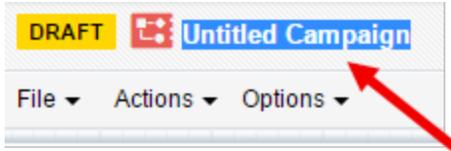
## To create a multi-step campaign:

1. Navigate to **Orchestration** , then click **Campaigns**.
2. Create a new multi-step campaign.
  - In the classic UI, click **Create a multi-step campaign**.
  - In the Redwood experience, click **Create > Multi-Step Campaign > Create**.
3. Select a template or use the blank campaign. The campaign canvas opens.



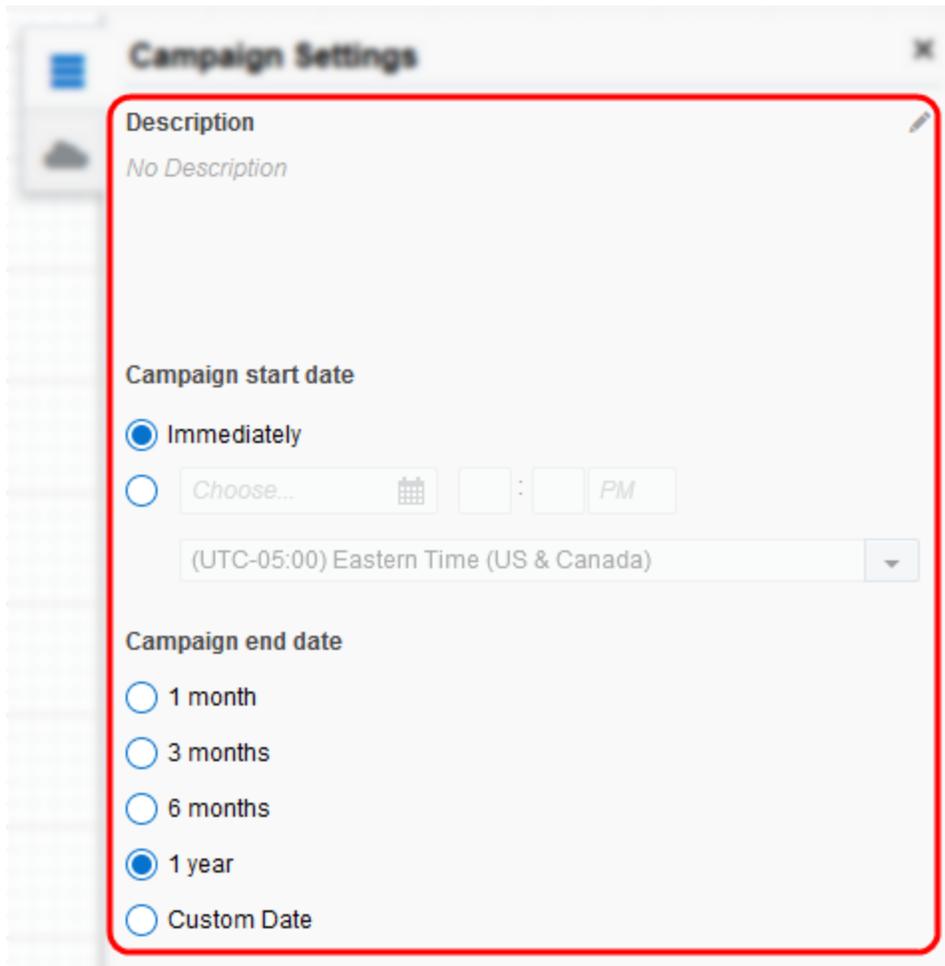
- 1 Campaign name and state
- 2 Menu bar
- 3 Campaign elements
- 4 Campaign canvas
- 5 Campaign settings

4. At the top of the canvas, double-click **Untitled Campaign** and type in a name for your campaign.



5. Configure the settings for your campaign.

- a. Click **Options**, then click **Campaign Settings**.
- b. Add a description of the campaign and set when the campaign will start and end.



- c. Click **Advanced** and configure additional details:

▲ **Advanced**

Contact campaign re-entry

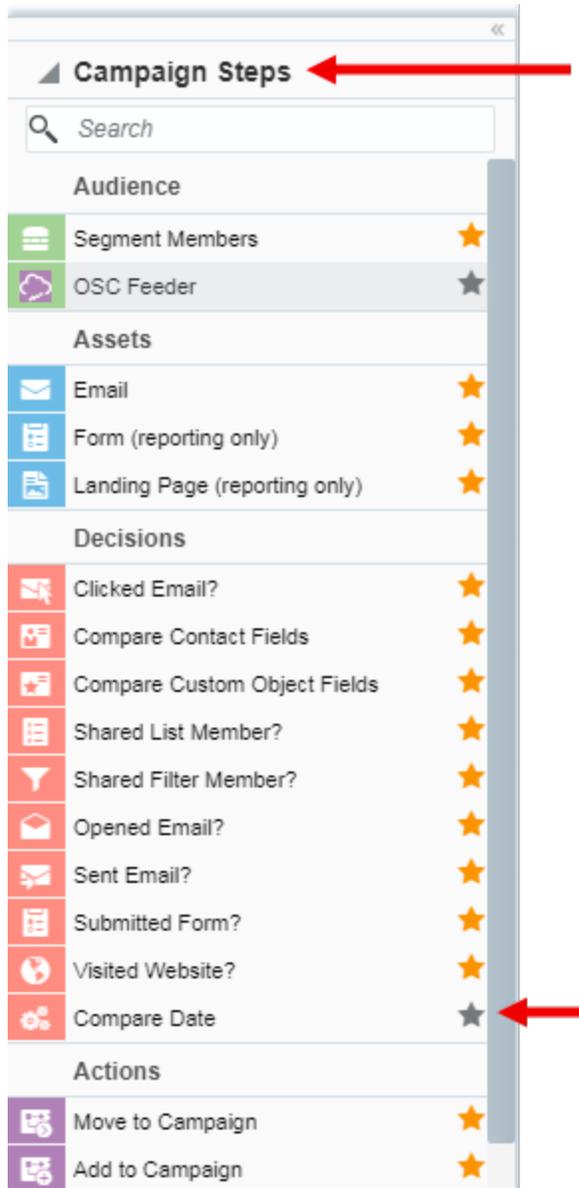
Allow contacts to enter the campaign more than once.

CRM

Sync with CRM

CRM Campaign ID

- To allow a contact to enter the campaign more than once, click the **Allow contacts to enter the campaign more than once** option. If you select this option, after a contact enters the campaign, the contact can enter the campaign again. For example, if you want to allow contacts to flow through a different path of your campaign and receive a different email. Or if you have an ongoing campaign where assets regularly change each time the contact flows through the campaign.
  - To sync the campaign with your CRM, click the **Sync with CRM** option. Leave the *CRM Campaign ID* field blank. It will populate after Oracle Eloqua syncs with your CRM.
- d. Click **X** to close the settings.
6. Configure any additional campaign information used by your organization by clicking **Options > Campaign Fields**. Use the *Campaign Fields* dialog to provide further information about the campaign that can also be used for reporting purposes. For example, budget information, any custom campaign fields required by your organization, and so on. You can also add an [end date notification](#) on the *Notifications* tab.
7. Add elements to the campaign canvas by double-clicking the element in the **Campaign Steps** pane. By default, popular elements are shown. To view all the available elements, click the **Campaign Steps** heading. You can mark your own favorite elements by clicking the star icon.



**Tip:** You can copy and paste groups of steps by highlighting them with your cursor and using your default keyboard shortcuts (for example, Ctrl+C to copy and Ctrl+V to paste).

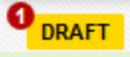
8. Configure each element by double-clicking the element. See the following topics for more information on campaign canvas elements:

- [Configuring audience elements](#)
- [Configuring asset elements](#)
- [Configuring decision elements](#)
- [Configuring action elements](#)

9. Connect the steps on the canvas to form the campaign flow. To do this, click the circle at the bottom of the element and drag the line that forms to the circle at the top the next element.

 **Tip:** Add notes to your campaign to help you remember where you left off while working and alert colleagues as to the purpose of your campaign. Learn about [adding notes](#).

10. Click **Save**.

 **Note:** Draft errors appear  until you have completely configured the campaign. Click the error indicator to view a list of all validation errors. You must resolve all draft errors before you can activate the campaign.

After you finish configuring the campaign and resolve all draft errors, you can [activate the campaign](#).

# Creating simple email campaigns

**Note:** We're updating our help center to reflect the new [Redwood experience](#). During the transition, some content reflects the previous version of the UI.

If you want to send a single email to a group of contacts, you can create a simple email campaign. The simple email campaign lets you send an email to a segment in a few steps and without having to touch the campaign canvas.

After you send the email, you can immediately start to see the email's performance and [metrics such as email opens, click-throughs, and conversions](#).

**Tip:** Enroll in [our free Udemy course](#) to learn about the basics of marketing automation and creating a simple email campaign in Oracle Eloqua.

Learn more by [watching the video!](#)

**Note:** The approvals workflow is not available for simple email and A/B test campaigns.

**To create a simple email campaign:**

1. Navigate to **Orchestration** , then click **Campaigns**.
2. Create a new simple campaign.
  - In the classic UI, click **Create a Simple Email Campaign**.
  - In the Redwood experience, click **Create > Simple Email Campaign > Create**.
3. First, give your campaign a name. In the classic UI, be sure that you select **Simple** as the campaign type.
4. Specify the segment to use for this campaign. You can optionally create a new one or upload a contact list instead.

 **Tip:** As you configure the campaign, Oracle Eloqua validates your configuration.

- In the classic UI, click the caution icon  to review the error.
- In the Redwood experience, click the step in the table of contents that appears with an error

indicator .

5. Next, specify the email to use in the campaign. You can choose an existing email, create a new one or upload an external file.
6. Next, specify when to launch the campaign.
  - To start the campaign immediately after you active it, click **Send now**.
  - To start the campaign on a specific date and time, click **Schedule for a later time** in the classic UI or **Send later** in the Redwood experience. You can then specify the date and time to start the campaign.
7. Click **Advanced sending options** to configure other email options.
  - **Use a Signature:** Allows you to configure the email signature. You can choose to *Send using a dynamic signature rule* or *Send on behalf of a single user*. If the campaign's email includes a layout, the signature will be dynamically populated based on the sender.

The sender's user account does not need to be active nor does the person associated to the user account need to have access to Oracle Eloqua. The user account and associated signature fields will be used to populate the email sender and sender information like a signature where applicable. [Learn more.](#)

- **Include List Unsubscribe header:** Add an unsubscribe header to your email.
- **Break send into smaller batches:** Break up sending emails into smaller batches. The period you use depends on the size of the segment. If you are not sure what period to set, start with about 1000 emails per hour. So, for a segment of 3000, sending the email over 3 hours will send 1000 per hour.
- **Only send during certain days and hours:** Allows you to configure when to send the email. For example, use this option to send only at off-peak hours or at an optimal time that you've determined.
- **Enable send time optimization:** Allows you to configure the email to send based on the contact's individual optimal send time. Available with the Eloqua Advanced Intelligence Cloud Service add-on only. [Learn more.](#)
- **Allow emails to be re-sent to past recipients:** Allow this email to be re-sent to past recipients. Typically, you do not want to select this option so that you don't send duplicate emails to your contacts.
- **Send email to master exclude members:** Allow this email to be sent to contacts on the master exclude list. This ensures that members on this list do not miss out on critical non-marketing emails, such as product information.
- **Send email to unsubscribed members:** Allow this email to be sent to unsubscribed contacts. This ensures that unsubscribed members do not miss out on critical non-marketing emails, such as product information.

#### 8. To configure campaign fields:

- In the classic UI, click **Actions** , then click **Settings**.
- In the Redwood experience, on the **Review and submit** step, click  **Properties**.

Here you can set campaign fields like product, country, and so on required by your company, and change the CRM sync or closed-loop reporting settings.

#### 9. Click **Save** to save the campaign.

10. Click **Activate Campaign** to activate the campaign according to its schedule.

 **Note:** You must resolve all errors before you can activate the campaign.

Oracle Eloqua sends the email or sends it according to the schedule you set. The campaign's status changes to Active or Scheduled. You cannot change the campaign once it is Active or Scheduled. Find out more about [changing an active or scheduled campaign](#).

## Monitoring campaign performance

After the campaign is Active, you can see a real-time view of the email's performance.

[Campaign reporting and metrics](#).

- To view the latest information, you can refresh the report. In the Redwood UI, this option is available in the *Actions* menu.
- To view details about the contacts included or excluded from the email send, use the participants report or the Email Entry and Email Exit operational reports.
- Real-time reporting is available for up to 3 months after the campaign was activated. Use Insight reporting for historical reporting. All activity for the email campaign is tracked for 12 months after the campaign started.

## Changing an active simple email campaign

A simple campaign runs for 3 months from the start date and collects activities for 1 year. If you need to make changes to the campaign like setting campaign fields or changing the

campaign name, you must first deactivate the campaign.

When you reactivate the campaign, Oracle Eloqua continues sending the email to those contacts in the segment that had not already been sent the email.

If you do not reactivate the campaign within 3 months, Oracle Eloqua closes the campaign and removes any contacts from the campaign that were not sent the email. The change is associated to the user who last modified the campaign. For more information, you can check out the [retention policy](#).

# A/B testing campaigns

A/B testing is one of the easiest ways to increase conversion rates and learn more about your audience. In an A/B test, you are testing a control version of an email (A) against a different version (B) to measure which one is most successful. Depending on your goals, an A/B test can help you determine such things as the effectiveness of subject lines, content, and calls to action.

**Tip:** To use a multi-step campaign, you can use the [Audience Split](#) step to split contacts down different paths by percentages.

## Before you start A/B testing

- Identify the objective of the A/B test. Typically, you want to identify one element of an email that you want to test. For example, you could focus on content elements like subject lines, headlines, or calls to action, or design elements like color choice, button design, and so on. This blog post can help identify the features you might want to test.
- Identify the metrics you'll use to measure the effectiveness of your A/B test. When setting up the test, Oracle Eloqua lets you identify one metric that determines the winning email. The winning metric could be one of the following: total opens, unique opens, total clicks, unique clicks, total conversion, or click-through rate. Choose the metric that aligns with your goals for the test. If you're looking for high engagement, you might want to focus on opens or clicks. If you're focused on goal completion, the total conversion metric might be more appropriate. For more information on how these metrics are calculated, see [Campaign reporting and metrics](#).
- Send the A/B test emails to enough contacts that you're confident the results of the test are trustworthy. The size of your segment, the content of the email, and any time constraints should help you determine an appropriate test group size.

- Plan to capture the results of the A/B test and share them. You'll want others to benefit from any new discoveries.

## Creating an A/B testing campaign

### To create an A/B testing campaign:

1. Navigate to **Orchestration** , then click **Campaigns**.
2. Create a new campaign.
  - In the classic UI, click **Create a Simple Email Campaign** and then click **A/B Test** in the wizard.
  - In the Redwood experience, click **Create > Simple Email Campaign > Create**.
3. First, give your campaign a name. In the classic UI, be sure that you select **A/B Test** as the campaign type.
4. Specify the segment to use for this campaign. You can optionally create a new one or upload a contact list instead. Later you will indicate what percentage of the segment to include in the testing.

 **Tip:** As you configure the campaign, Oracle Eloqua validates your configuration.

- In the classic UI, click the caution icon  to review the error.
- In the Redwood experience, click the step in the table of contents that appears with an error

indicator .

5. Next, specify the emails to use in the test.

6. Specify the size of your test audience and the metric (such as total opens or total clicks) that determines the winning email.

- To configure the percentage of the segment that you want to participate in the A/B test, drag the slider. For example, when you set it to 50%, this means that 50% of the segment will participate. 25% of the segment will receive the control email (A) and 25% will receive the test email (B).
- To select the metric to determine which email performed the best, select the **Winning Metric**.
- Configure how long you want the A/B testing campaign to run. You can set the test to run for hours, days, weeks, or months or set an end date.
- To automatically send the winning email to the remaining contacts when the A/B test ends, select **Automatically send the winning version**. We'll only send out the winner if a winner is declared based on the winning metric. Otherwise, you'll get a notification if the test was inconclusive. In the event of a tie, Oracle Eloqua sends an email and you must [manually select a winner](#).

7. Next, specify when to launch the campaign.

- To start the campaign immediately after you active it, click **Send now**.
- To start the campaign on a specific date and time, click **Schedule for a later time** in the classic UI or **Send later** in the Redwood experience. You can then specify the date and time to start the campaign.

8. Click **Advanced sending options** to configure other email options.

- **Use a Signature:** Allows you to configure the email signature. You can choose to *Send using a dynamic signature rule* or *Send on behalf of a single user*. If the campaign's email includes a layout, the signature will be dynamically populated based on the sender.

The sender's user account does not need to be active nor does the person associated to the user account need to have access to Oracle Eloqua. The user account and associated signature fields will be used to populate the email sender and sender information like a signature where applicable. [Learn more](#).

- **Include List Unsubscribe header:** Add an unsubscribe header to your email.
- **Break send into smaller batches:** Break up sending emails into smaller batches. The period you use depends on the size of the segment. If you are not sure what period to set, start with about 1000 emails per hour. So, for a segment of 3000, sending the email over 3 hours will send 1000 per hour.
- **Only send during certain days and hours:** Allows you to configure when to send the email. For example, use this option to send only at off-peak hours or at an optimal time that you've determined.

- **Enable send time optimization:** Allows you to configure the email to send based on the contact's individual optimal send time. Available with the Eloqua Advanced Intelligence Cloud Service add-on only. [Learn more.](#)
- **Allow emails to be re-sent to past recipients:** Allow this email to be re-sent to past recipients. Typically, you do not want to select this option so that you don't send duplicate emails to your contacts.
- **Send email to master exclude members:** Allow this email to be sent to contacts on the master exclude list. This ensures that members on this list do not miss out on critical non-marketing emails, such as product information.
- **Send email to unsubscribed members:** Allow this email to be sent to unsubscribed contacts. This ensures that unsubscribed members do not miss out on critical non-marketing emails, such as product information.

9. To configure campaign fields:

- In the classic UI, click **Actions** , then click **Settings**.
- In the Redwood experience, on the **Review and submit** step, click  **Properties**.

Here you can set campaign fields like product, country, and so on required by your company, and change the CRM sync or closed-loop reporting settings.

10. Click **Save** to save the campaign.

11. Click **Activate Campaign** to activate the campaign according to its schedule.

 **Note:** You must resolve all errors before you can activate the campaign.

Oracle Eloqua sends the email or sends it according to the schedule you set. The campaign's status changes to Active or Scheduled. You cannot change the campaign once it is Active or Scheduled. Find out more about [changing an active or scheduled campaign](#).

## Monitoring campaign performance

After the campaign is Active, you can see a real-time view of the email's performance. To view the latest information, click **Refresh**. To view which [contacts were included or excluded from the emails](#), use the **View Participants** report.

After the A/B test campaign ends, you can review the overall performance of the winning email. If you automatically sent the winning email to the remaining segment, the overall performance will be updated with the details from the winning email. [About the results of an A/B test](#).

## Changing an active A/B test

An Active testing campaign cannot be deactivated. If you want to stop sending the test emails and end the test, you must cancel the campaign. In the Redwood experience, click **End Campaign** on the *Campaign Details* tab.

## About the results of an A/B test

 **Note:** We're updating our help center to reflect the new [Redwood experience](#). During the transition, some content reflects the previous version of the UI.

After you activate an A/B testing campaign, you can keep an eye on the results. Oracle Eloqua continues to track all activity for the testing campaign for 12 months after the campaign started.

## Real-time summary of the campaign

While the A/B testing campaign is running and before a winner has been chosen, you can view the results of the test in real-time. You can view how many emails we sent or excluded, a count of contacts included in the testing, and real-time email performance metrics.

- ① Total emails sent or excluded
- ② Total contacts included in the test
- ③ Email performance metrics
- ④ Link to view contacts included or excluded from the send

## Viewing the contacts included or excluded from the campaign

To view the details of the contacts sent an email in the A/B testing campaign (or those that excluded from the original segment), use the *View Participant* links. This provides visibility into which contacts received the emails, and which failed to receive them, either due to unsubscribes, bouncebacks, or other deliverability issues.

## Winning metrics and campaign performance

After a winner has been chosen, you can view the performance of the winning email. Find out more about [reporting metrics](#).

**Tip:** You can view the metrics from the original test in the *Email testing details* section.

## Choosing the winning email of an A/B testing campaign

If you did not choose to automatically send the winning email, you can manually choose the winner. This will allow you to [view a final report](#) about the performance of the winning email.

**Note:** You can manually select the winning email at any time - even when the campaign is still running. After manually selecting a winner, Oracle Eloqua sends out the winning email to the remaining segment if the campaign was configured to do so.

### To select the winning email:

1. Navigate to **Orchestration** , then click **Campaigns**.
2. Open the A/B testing campaign.

### 3. Choose the winner:

- In the classic UI, click **Select Winner**. Choose the winning email and then click **End Test**.

The screenshot shows a web interface titled "Select Winner to End Test Now". Below the title, it says "A/B Test has been completed, please select a winner below". In the top right corner, there is a "View" dropdown menu currently set to "Total Opens". The main content area displays two test variants, A and B. Variant A is labeled "A-Test-02242017" and has a subject line "Sample A test". Variant B is labeled "B-Test-02242017" and has a subject line "Sample B test". Both variants show a preview of an email and a "View Participants" link. To the right of each variant, there is a large grey box representing the number of total opens, both currently showing "0 TOTAL OPENS". At the bottom left, there is a button labeled "Select Winner" which is highlighted with a red rectangle. To its right, a note states "This will end the test immediately."

- In the Redwood UI, choose the winning email and then choose **Select Winner**.

The screenshot shows a web interface titled "Select Winner". Below the title, there are two radio button options: "Email A" (which is selected) and "Email B". Below these options is a button labeled "Select Winner".

# Setting up campaign notifications

The following campaign notifications are available in Oracle Eloqua:

- [Wait step notifications](#)
- [Campaign end date notifications](#)

## Notifying users when a contact enters a wait step

You can send notifications to the [Marketing Operations Center](#) when a contact enters a wait step in a multi-step campaign. All users with [interface access](#) to the MOC will be able to see the notifications. This is useful when using wait steps as an "error step" to determine when contacts are not following the desired path through a campaign.

 **Example:** You have a wait step set after the *No* path of a decision step. This wait step is designated as an "error step" to determine when a contact slips through the decision filter. Your team is then to determine the cause of the error and update the contact accordingly. Through the wait step notifications, your team can check the [Marketing Operations Center](#) to determine when a contact enters one of these error steps across all campaigns with wait step notifications.

### To set up a wait step notification:

1. Navigate to **Orchestration** , then click **Campaigns**.
2. Open an existing multi-step campaign or [create a new one](#).

3. Right-click the wait step for which you want to receive notifications.
4. Select the **Send a notification** check box.

Step name:  
Wait

Choose how long contacts should wait in this step:

Wait for a set amount of time:  
1 Week(s)

Wait until a specific date and time:  
Choose... : PM

Time zone:

Send a notification to the notification center when a contact enters the step

5. Click **Save**.

### To view wait step notifications:

1. Navigate to **Home** , then click **Operation Center**.
2. The notifications will be arranged by time received, and display the campaign and step name.

 **Note:** The campaign will be hyperlinked so you can quickly navigate to the relevant wait step.

## Notifying users about an ending campaign

You can notify users when a multi-step campaign is coming to a close. Maybe you have an ongoing nurture campaign for prospects and you're going to extend the end date before the campaign concludes. You can have Oracle Eloqua send an email notification to selected users when the campaign is approaching its end date.

### To set a notification about an ending campaign:

1. Navigate to **Orchestration** , then click **Campaigns**.
2. Open an existing multi-step campaign.

**Note:** If you create a new campaign, the Notifications tab in the Campaign Fields window only appears after you save your campaign.

3. Click **Options**, then **Notifications**.

The screenshot shows a window titled "Campaign Fields" with four tabs: "General", "Financials", "Custom Fields", and "Notifications". The "Notifications" tab is active. It contains an information icon (i) followed by the text: "Add users to this list to receive a notification before the campaign's end date. If the campaign's end date is sooner than the campaign notification duration, we will send out an email immediately to all users in the notification list." Below this is a large rectangular input field with the placeholder text "add a user...". Underneath the input field is the label "Send campaign completion notification:" followed by a dropdown menu currently showing "2 business days before". At the bottom right of the window are two buttons: "Cancel" and "Done".

4. Search for a user by typing in the *add a user* field, then select the user from the list. You can have a maximum of 10 users in a campaign notification
5. Select when you want to notify users of the campaign ending from the **Send campaign completion notification** drop-down list.

**Note:** If the campaign end date is sooner than the selected date, an email will be sent to the selected users immediately.

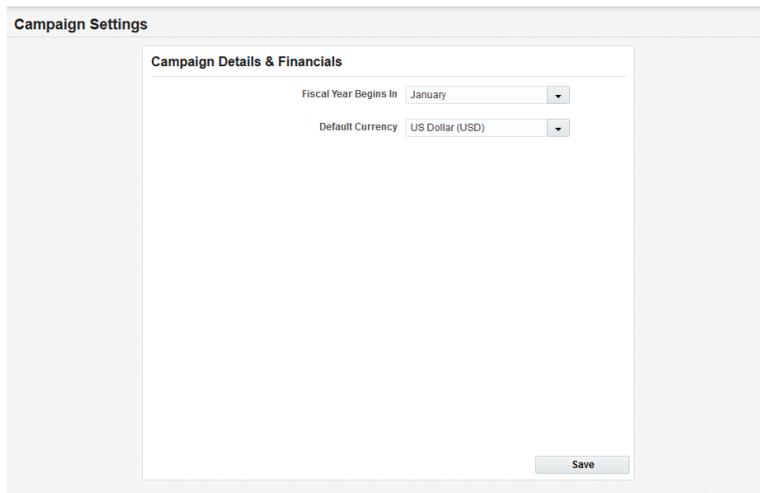
6. Click **Done** and then save your campaign.

# Configuring campaign details and financials

As a customer administrator you can setup default campaign details and financial information. These settings are usually configured when campaigns are initially implemented in the application, so that all subsequent campaigns use the same baselines and are directly comparable. These defaults are applied to all campaigns, but they can be adjusted at any time.

To configure campaign details and financials:

1. Navigate to **Orchestration**  > **Tools**, then click **Campaign Settings**. The *Campaign Settings* window opens.



The screenshot shows a window titled "Campaign Settings". Inside, there is a section titled "Campaign Details & Financials". This section contains two dropdown menus: "Fiscal Year Begins In" set to "January" and "Default Currency" set to "US Dollar (USD)". A "Save" button is located at the bottom right of the form area.

2. Configure the *Campaign Details & Financials* section:
  - **Fiscal Year Begins In:** Set the month in which fiscal reporting for your company begins for a new financial year. This allows you to align marketing reports with financial reports.
  - **Default Currency:** Set the currency that will be used by default for financial calculations.

 **Note:** Default currency maps to the field called *Base Currency* in the financial set-up details.

3. Click **Save** when you are finished.

Default campaign details and financials are set. You can change them at any time.

# Activating multi-step campaigns

You can activate a multi-step campaign now or schedule it to start later. To activate the campaign, you must specify how long you want the campaign to run.

After the campaign ends, the following occurs:

- Oracle Eloqua deactivates the campaign and the status changes to COMPLETED.
- The campaign becomes read-only and you cannot reactivate the campaign, add contacts to it, or modify any settings. If you want to reuse the campaign, you can copy it.
- Oracle Eloqua removes all contacts who were members of a campaign element and the contacts exit the campaign.
- Oracle Eloqua continues to track all campaign activity for 12 months after the campaign end date. If a contact opens an email, submits a form, or performs other campaign-related activities, Oracle Eloqua captures those actions and you can report on them.



**Note:** You must have permissions to activate a campaign. If you see an **Approvals** button on the campaign canvas, the campaign must go through an [approvals process](#) before activation. See [campaign activation security](#) for more information about activation permissions.

## Before you begin:

- Resolve any draft errors . You can view the errors by clicking the error indicator or by clicking **Verify**. All errors must be resolved before you can activate the campaign.

- Ensure that any [Oracle Eloqua AppCloud apps](#) on the campaign canvas are fully configured.
- After you activate the campaign, you cannot make changes to it. You will have to [deactivate the campaign](#) to make changes.
- Test your campaign and the campaign assets thoroughly. For example, send test emails, preview landing pages, and submit forms associated with the campaign.

**Note:** You cannot activate a campaign if the campaign reporting start date is after the activation date. See [this knowledge base article](#) to find out more about campaign dates.

### To activate a campaign:

1. Navigate to **Orchestration** , then click **Campaigns**.
2. Open the campaign you want to activate.
3. Click **Activate**. The *Activate Campaign* window opens.

**Activate Campaign**



### Campaign Activation Start Time

Start Now
   
 Start Later:
 

 :  PM

---



### Campaign Activation End Time

Campaign Reporting will associate with this campaign from 7/27/2016 to 7/27/2018  
 (12 months after the completion date).

**Note:** You will also see *Campaign Activation User* options if you are an administrator.

4. Configure the activation:

- To start the campaign immediately, click **Start Now**.
- To choose a date for the campaign to start, click **Start Later** and schedule the start date and time. The default time zone is based on the server, not the time zone from your local machine.
- Specify the duration of the campaign using the **Campaign Activation End Time** field. The end time will always be at midnight on the date selected. The default end date is for 3 months. Only set durations up to what is necessary and not far beyond. This is to prevent the canvas from continually triggering the segments to run unnecessarily. After the end date, the campaign will become read-only and Oracle Eloqua continues to track all campaign activity for 12 months after the campaign end date. You can also set up an [end date notification](#) for your campaign.

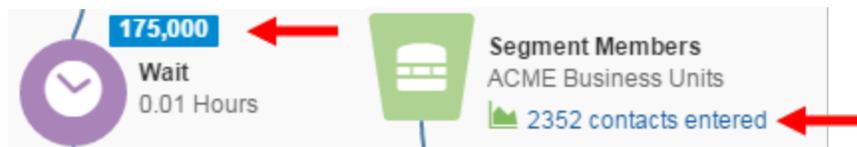
5. Click **Activate** or **Schedule** to save your changes.

Oracle Eloqua activates the campaign according to the schedule you set and the campaign's status changes to Active or Scheduled.

**After you finish:**

After a campaign is Active, you can track the flow of contacts through your campaign elements:

- To view where contacts are in the campaign, click **Refresh**. A number appears beside elements telling you how many contacts are now in that element. If there is a segment element, a number next to the element indicates the number of contacts who've entered the element so far.
- To view more information about the counts, double-click the number. See [Tracking segment members in campaigns or programs](#) for more information.



## About deactivating campaigns and Oracle Eloqua's retention policy

When you deactivate a campaign, Oracle Eloqua does the following:

- Changes the campaign's state to DRAFT. The change is associated to the user who last modified the campaign.
- Stops moving campaign members through the campaign.
- Holds campaign members in their current step until you reactivate the campaign.

A deactivated campaign can remain in this DRAFT state and hold campaign members for 3 months. After that, Oracle Eloqua performs the following clean-up tasks on those campaign members Oracle Eloqua was holding:

- Removes the campaign members that were being held
- Removes the campaign entry record for those removed members and they no longer appear in the [Campaign Entry report](#)

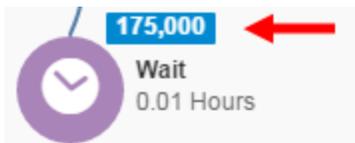
- Identifies the removed campaign members in the [Campaign Exit report](#) with the exit type *Removed due to Retention Policy*

# Moving contacts through a program or campaign

In most cases, once you set up your program or multi-step campaign, you will let contacts flow automatically through the workflow. However, you can manually move contacts through a decision or action step or remove them from the campaign or program all together.

To move contacts through or remove contacts from a step:

1. In the campaign canvas or program canvas, double-click the number of contacts on a decision or action step.



The step members report opens.

View Campaign Step Members										
Campaign Name: Example Campaign			Displaying 200 of 5,000 total members)			<input type="text" value="Enter search term"/>				
Step Name: Compare Contact Fields			<input type="checkbox"/> Select All Contacts							Contact View    General Contact Fields
First Name	Last Name	Title	Business Phone	Address 1	City	Industry	Status	Email Address	Entr	
Gemma	Ryan		348-919-4346	737 Clement Oaks	Kumport	Please Select...	Awaiting action	gemma.ryan@salesforce.com		
Tara	Hoff		(563)185-0003	2000 Clifford Garden	Kaestlerbury	Please Select...	Awaiting action	tara.hoff@salesforce.com		
Lily	Wardle		928-610-0167	5790 Stark Hollow	Vishnie	Please Select...	Awaiting action	lily.wardle@salesforce.com		
Halley	Von		395-854-3553	274 Austin Ways	Vuvenfort	Please Select...	Awaiting action	halley.von@salesforce.com		
Celine	King		(271)631-9244	655 Borer Court	Ettonborough	Please Select...	Awaiting action	celine.king@salesforce.com		
City	Carroll		148-828-9832	655 Borer Court	East Alanya	Please Select...	Awaiting action	city.carroll@salesforce.com		
Melaryn	Fadel		130-828-1366	74984 Funi Fall	South Zoroastri	Please Select...	Awaiting action	melaryn.fadel@salesforce.com		
Felipa	Herzog		679-146-2600 v948	719 Winder Mills	Jarrosinhaber	Please Select...	Awaiting action	felipa.herzog@salesforce.com		
Luciano	Willing		(644)254-2564	6776 Green Canyon	Luluade	Please Select...	Awaiting action	luciano.willing@salesforce.com		
Tyler	Schmitt		1-776-604-8553 v860	305 Saumbach Roads	Truelfort	Please Select...	Awaiting action	tyler.schmitt@salesforce.com		
Carmon	Remmer		1-850-613-2155	797 Rainhead Pike	New Heavenb	Please Select...	Awaiting action	carmon.remmer@salesforce.com		
Isabel	Monahan		949-956-3643 v118	55932 Queens Hills	New Magal	Please Select...	Awaiting action	isabel.monahan@salesforce.com		
Randal	Glover		1-740-390-8798 v898	87513 Shanna Islands	Ruckermouth	Please Select...	Awaiting action	randal.glover@salesforce.com		
Lily	Spencer		(648)431-3177	488 Runle Street	Uptonburgh	Please Select...	Awaiting action	lily.spencer@salesforce.com		
Waldon	Smith		1-790-348-8752 v261	19924 Feast Ways	Port Parafort	Please Select...	Awaiting action	waldon.smith@salesforce.com		
Louvenia	Walker		1-211-040-8384	469 Irma Hill	Port Mariana	Please Select...	Awaiting action	louvenia.walker@salesforce.com		
Halley	Volkman		(714)016-8943 v593	756 Khalil Meadows	West Annelle	Please Select...	Awaiting action	halley.volkman@salesforce.com		
Scotty	Stroman		616-610-3124 v96771	580 Otesa Mission	New Giovanni	Please Select...	Awaiting action	scotty.stroman@salesforce.com		
Kennedy	Gotmer		(771)375-0199 v11676	2573 Spencer Prairie	West Myntor	Please Select...	Awaiting action	kennedy.gotmer@salesforce.com		
Altaga	Ludtgen		398.237.0596	34181 Ali Hill	Schmerhenes	Please Select...	Awaiting action	altaga.ludtgen@salesforce.com		
Maccom	Zeme		111-190-6489 v1224	407 Davon Drive	Bection	Please Select...	Awaiting action	maccom.zeme@salesforce.com		
Courtney	Ofkon		669-905-8591 v52444	380 Wills Path	East Zula	Please Select...	Awaiting action	courtney.ofkon@salesforce.com		
Ashley	Stroman		1-862-862-8103 v969	460 Skylar Hill	South Raymor	Please Select...	Awaiting action	ashley.stroman@salesforce.com		
Arne	Zeme		616-582-9124 v87965	15345 Margret Ridge	Larchester	Please Select...	Awaiting action	arne.zeme@salesforce.com		
Angie	Funk		1-791-876-2362 v71982	59299 Jessy Cape	Port Jeronymo	Please Select...	Awaiting action	angie.funk@salesforce.com		
Nerwith	Conn		980-615-5056 v31596	39932 Dennis Valley	Luluade	Please Select...	Awaiting action	nerwith.conn@salesforce.com		

2. Choose an option:

- To move a contact to another step, select the contacts in the report, then click **Move**. Choose the new step and click **Move Members**.
- To remove a contact from the campaign or program, select the contacts, then click **Remove**.

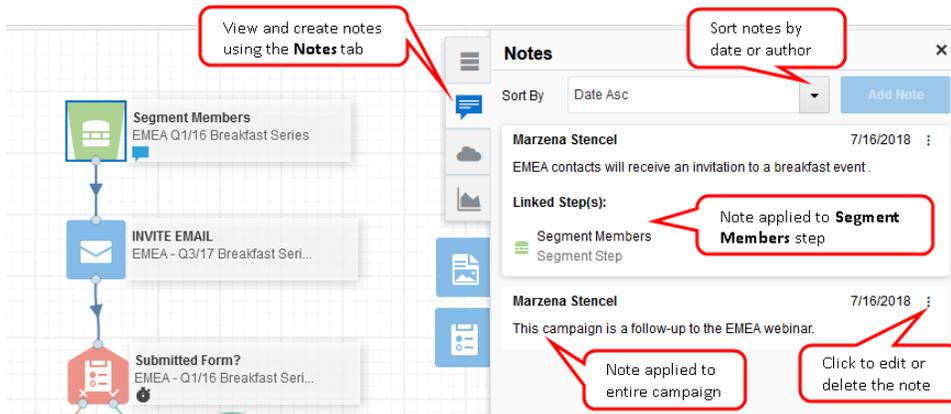
## Removing contacts from a simple campaign

You can remove contacts from a simple campaign if the contact was excluded from the email send.

1. Open the simple campaign. The campaign must be active or completed.
2. Open the *View participants* report:
  - In the classic UI, click **View Participants** link under the segment name.
  - In the Redwood experience, click **Actions > View participants**.
3. On the **Excluded** tab, select the contacts you want to remove and click **Remove**. If you want to remove all the excluded contacts, click **Remove All**.

# Adding notes to campaigns and programs

Notes can help you remember where you left off while working and alert colleagues as to the purpose of your campaign or program. You can create general campaign and program notes, as well as notes for a single step.



## To add a note to a campaign or program:

1. Open an existing [multi-step campaign](#) or [program](#).
2. Select your note destination.
  - To add a note to the entire campaign or program, click **Notes** , then click **Add Note**.
  - To add a note to a single step, right-click the step to which you want to add a note, then click **Add Note**.
3. Type your note content.
4. Click **Add Note** to save.

Once your note is saved, click  to edit or delete it. Notes can be edited or deleted by any user who has edit permission to the asset.

# Copying campaigns

You can make a copy of a simple or multi-step campaign. You can then change the campaign for your needs. When you copy the campaign, Oracle Eloqua copies almost all the campaign's configuration and settings. After you make a copy, you'll want to open the copy and make sure you configure it for your current needs.

**Tip:** If you are copying a multi-step campaign, you might consider [creating a campaign template](#) instead. Templates are an easy way to speed up your campaign creation process, reduce errors, and ensure consistency.

## To copy a campaign:

1. Navigate to **Orchestration** , then click **Campaigns**.
2. Search for the campaign you want to copy.
3. Copy the campaign:
  - In the classic UI, right-click the campaign in the search results and select **Copy**.
  - In the Redwood experience, click **Actions**  > **Copy**.
4. The copied campaign appears with the word *Copy* appended to the name. The copied campaign has a DRAFT status.

5. Open the copy and make the changes you need before activating the campaign.

 **Tip:** Make sure you rename the campaign so that it reflects its current purpose.

# Campaign templates

You can create custom multi-step campaign templates. Using templates can help speed up your campaign creation process and reduce errors. Templates can also help your organization maintain consistency, which is important when you have many Oracle Eloqua users.

In this topic, you'll learn about:

- [Creating templates](#)
- [Finding and using a template](#)
- [Managing campaign template](#)

## Creating templates

**Before you begin:**

- Consider the types of templates your organization needs. If you are consistently creating the same types of campaigns, you should consider making those campaigns into templates.
- Make sure that your template follows the best practices used by your organization such as campaign timing or naming conventions.

**Note:** After you save a template, you cannot change it. To change the template, create a new campaign using the template you want to change. Make your changes and then save the campaign as a new template. You can then delete the old template to avoid confusion.

## To create a template:

1. Navigate to **Orchestration** , then click **Campaigns**.
2. Create a **new multi-step campaign** or open an existing one that you want to use as the basis for your template.
3. Set up the campaign completely including the campaign settings and campaign fields. Give the campaign steps descriptive names that will help users understand the elements of the campaign.

**Important:** Before you save the template, make sure you have completely set up the template. Remember, you cannot change a template after you save it.

4. Select **File > Save as Template**.

### Save as Template



**Change Icon...**

**Name:**

**Description:**

**Text to Display for Link:**

**URL for Link:**

5. Complete the information about the template and click **Save**. This information appears in the *Template Chooser* window when users choose the template.
  - To link to a web page that provides more information about the template, complete the **Text to Display for Link** and **URL for the Link** fields. When users select the template, they can follow the link to find out more.

## Finding and using a template

After you create a template, users can use it to help them create a new campaign.

**Note:** Templates do not get included in the regular campaign search. They're only displayed and searchable in the Template Chooser.

### To find and use a campaign template:

1. Navigate to **Orchestration** , then click **Campaigns**.
2. Create a new multi-step campaign.
  - In the classic UI, click **Create a multi-step campaign**.
  - In the Redwood experience, click **Create > Multi-Step Campaign > Create**.
3. Select the template to continue with the campaign creation.

## Managing campaign template

After creating a template, you can change it, rename or delete the template. Any changes you make will impact the next campaign created with the template.

**Note:** You can only change the template using the Redwood experience. In the classic UI, you can rename, delete, and copy templates using the template chooser.

### To manage a campaign template:

1. Turn on the Redwood experience.
2. Navigate to **Orchestration** , then click **Campaigns**.
3. Click **Templates** from the page selector and find your template.
4. Open the template to make your changes. To rename or delete the template, click the **Actions** menu and choose the option.

# Deleting campaigns

## Before you begin:

- You cannot delete Active or Scheduled campaigns. If you want to delete a campaign in one of these states, [deactivate the campaign](#) first.
- You must resolve all dependencies before you can delete a campaign. In the Redwood experience, you can check dependencies from the campaigns launch pad. When you try to delete a campaign with dependencies, Oracle Eloqua displays them for you so that you can resolve them.

## To delete a campaign:

1. Navigate to **Orchestration** , then click **Campaigns**.
2. Search for the campaign you want to delete.
3. Delete the campaign:
  - In the classic UI, right-click the campaign in the search results and click **Delete**.
  - In the Redwood experience, click **Actions**  > **Delete**.

# Campaign canvas elements

The campaign canvas includes a wide variety of elements that you can use to create rich, multi-step campaigns that meet your marketing goals.

Each element has its own configuration needs: some elements, like *Wait*, are very straightforward, while others require a more complex configuration. When you fully configure an element, it changes color. You must fully configure all elements before you can activate a campaign.

You can also extend the functionality of the campaign canvas by using [Oracle Eloqua AppCloud apps](https://cloudmarketplace.oracle.com/marketplace/en_US/homePage.jspx) (https://cloudmarketplace.oracle.com/marketplace/en\_US/homePage.jspx). These apps enable you to integrate your campaign with other systems like WebEx or GoToWebinar.

## Example of using elements in campaigns

Using the campaign canvas, you can rapidly assemble marketing campaigns, either simple or complex, using elements such as segments, emails, landing pages, decision rules, and actions (wait or send to program). To create a campaign, you must follow these simple steps:

1. Specify a start and end date for the campaign, this is the period during which the campaign will be active.
2. Drag all of the elements onto the campaign canvas.
3. Double-click each element and select the specific instance of the element.

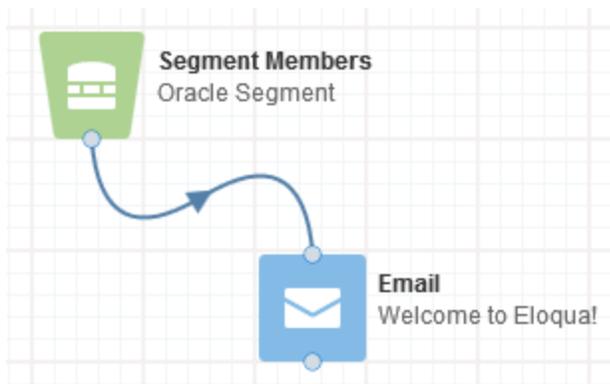
4. Connect the elements together and save.

**Note:** A campaign is not active until you click the **Activate** button in the upper-right corner.

The following are some examples of the types of marketing campaigns you can build using the campaign canvas.

#### Example 1: Creating a simple email campaign

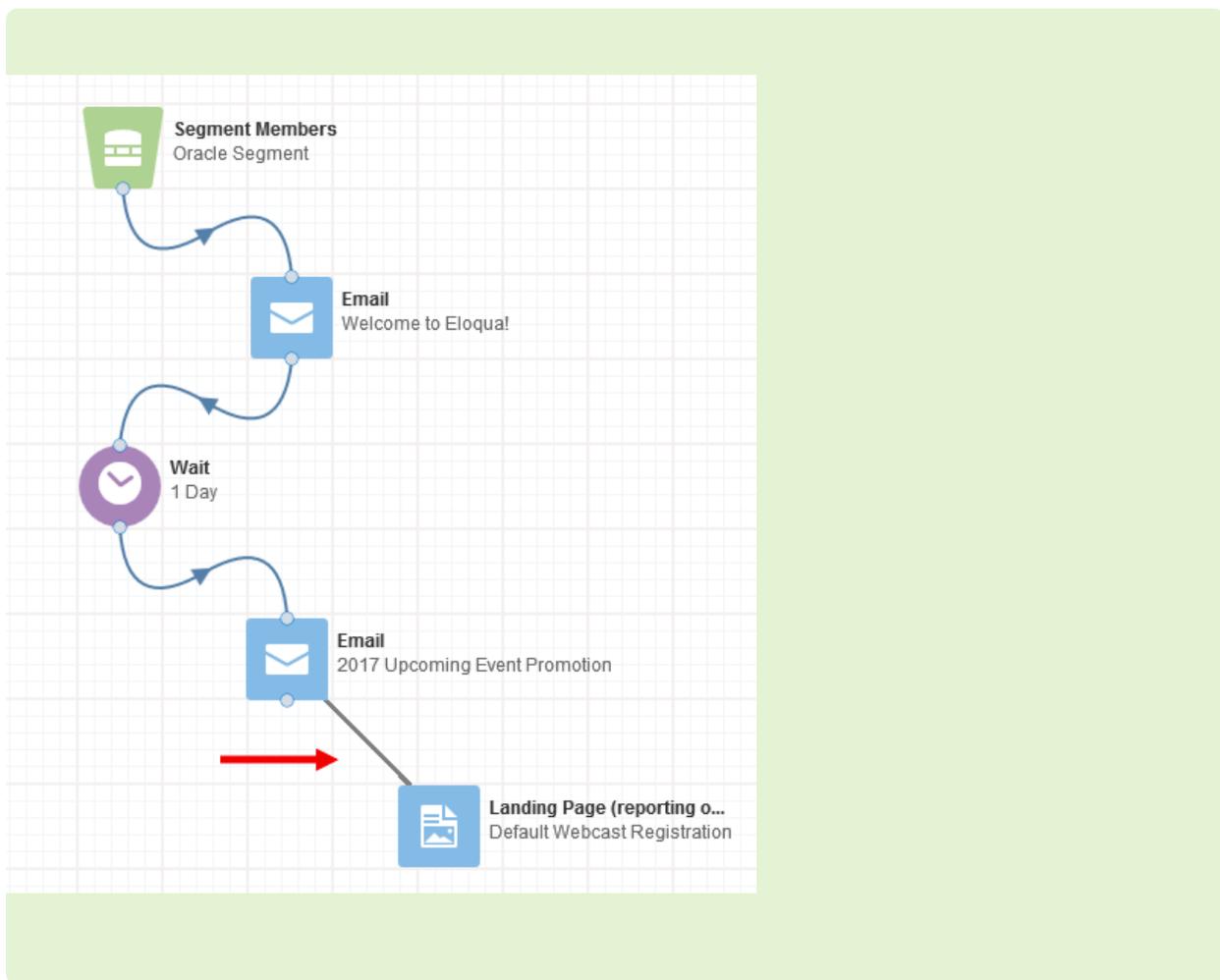
The simplest campaign is one where you send an email to a segment of contacts. For this, you only need a segment element with an email element.



#### Example 2: Setting up a simple campaign with a landing page

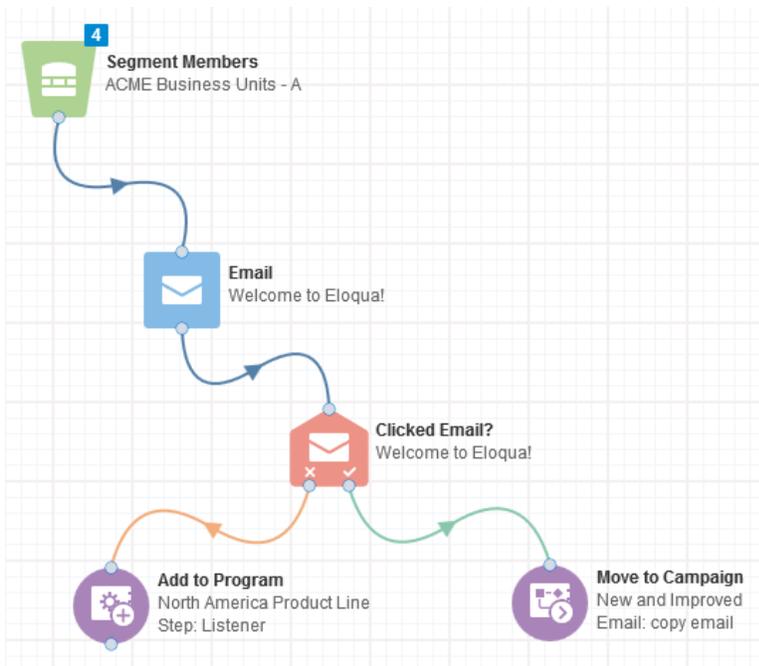
You can also distribute an email that provides a click-through link to a landing page. Make sure that the link in the email goes to the landing page you specify.

**Note:** If the email contains a link to a landing page, the campaign canvas will automatically create a connection between them.

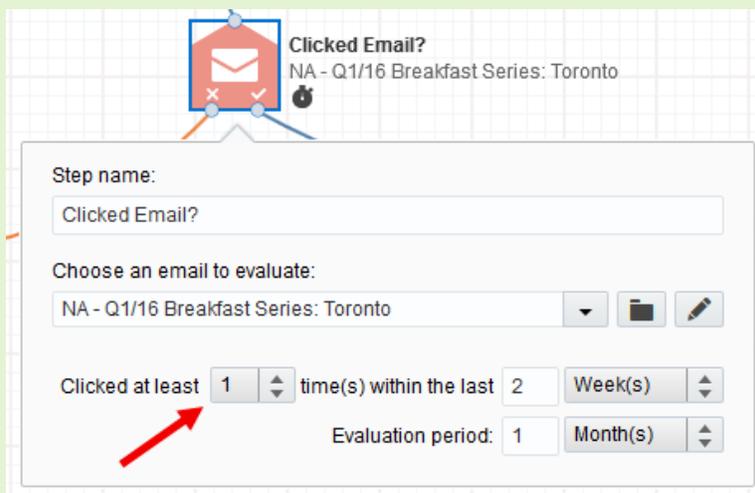


### Example 3: Testing for a click-through on a link

You might want to use a decision rule to test whether the recipient clicks-through on a specific link in the email, then execute other rules or actions based on whether they did. In the example shown, recipients are sent another email if they click through on the link, but if not, they're sent to a lead nurturing program (the name of the specific step in the program is shown in the send to program element).



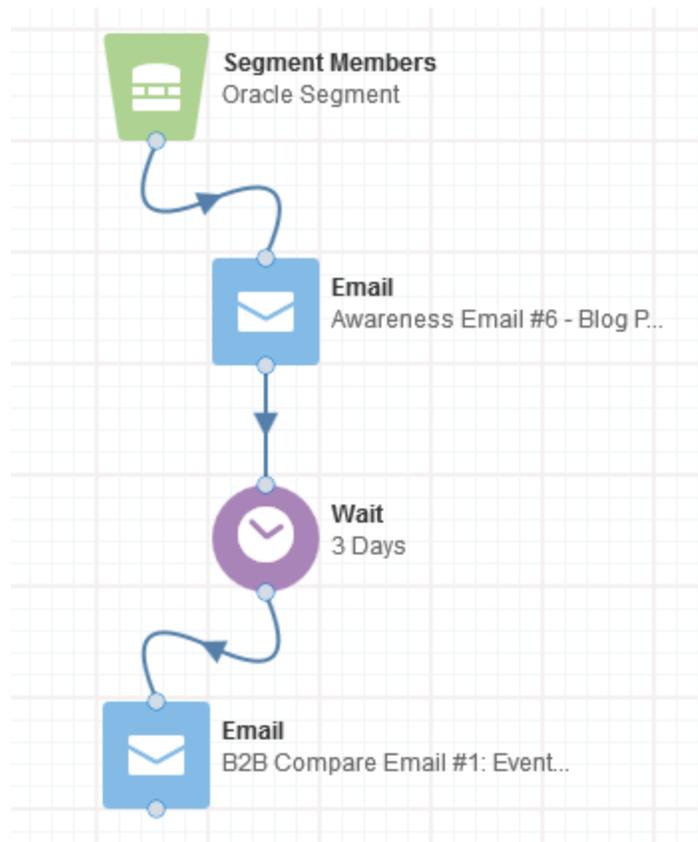
**Note:** The number of clicks, when the clickthrough occurred, and the duration of the evaluation window going forward are included in the *Clicked Email?* element.



A small stopwatch  icon is added to the element after you configure it.

#### Example 4: Including a wait time

Another example is to send an email, then to wait a set time and then send another email. This can be useful if you are starting with a distribution list of committed recipients and don't need an "opt in" to send the second email.



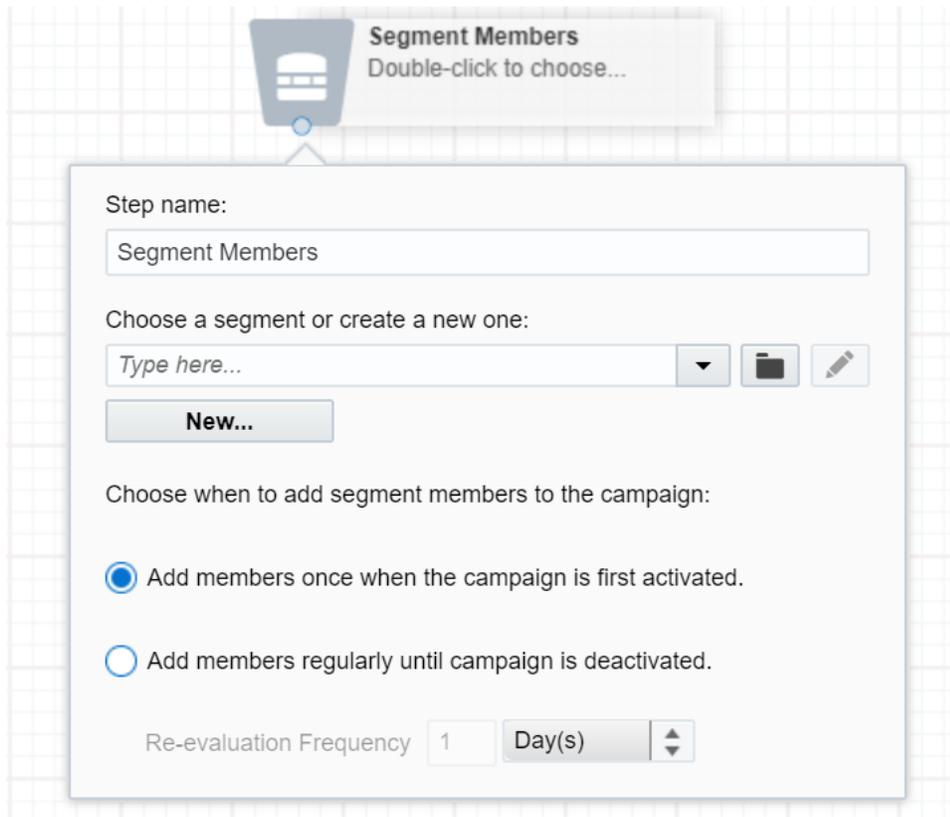
## Configuring campaign canvas elements: Audience

When you add an audience element to your campaign canvas, you are identifying the contacts to include as members of the campaign. The following audience elements are available:

- [Segment members](#)
- [Cloud Feeder](#)

# Segment members

Add members to the campaign flow by using a [contact segment](#).



The image shows a configuration dialog box for a 'Segment Members' step. At the top, there is a header with a folder icon, the text 'Segment Members', and a subtitle 'Double-click to choose...'. The dialog box contains the following fields and options:

- Step name:** A text input field containing 'Segment Members'.
- Choose a segment or create a new one:** A dropdown menu with the placeholder text 'Type here...'. To the right of the dropdown are three icons: a folder icon, a folder icon with a plus sign, and a pencil icon.
- New...:** A button located below the dropdown menu.
- Choose when to add segment members to the campaign:** Two radio button options:
  - Add members once when the campaign is first activated.
  - Add members regularly until campaign is deactivated.
- Re-evaluation Frequency:** A numeric input field containing '1' and a unit dropdown menu set to 'Day(s)'.

## To configure the Segment Members element:

1. Type a descriptive name for the step in the **Step name** field.
2. Select the segment from the drop-down list, or click **Folder**  and browse to the segment.

Alternatively, you can click **New** to create a new segment.

3. Choose how you want the segment members to be evaluated:
  - To evaluate the segment one time, click **Add members once when the campaign is first activated**.  
After you activate the campaign, members of the segment at the time of activation enter the

campaign. No new segment members can enter the campaign after it is activated. If you use this

option, the element appears gray on the canvas .

- To evaluate the segment continuously while the campaign is active, click **Add members regularly until campaign is deactivated** and specify how often to evaluate the segment. Oracle Eloqua will evaluate the segment according to the frequency you specify and add new segment members to the campaign. The default re-evaluation frequency is every 1 day. If you use this option, the element

appears green on the canvas .

**Important:** Avoid evaluating the segment hourly as this can overload the system. It is recommended to evaluate as infrequently as possible, e.g. once a day.

**Note:** For campaigns activated with a segment re-evaluation in release 25B or later, the re-evaluation will be calculated precisely using the last activation time and the number of re-evaluations.

**Note:** For Re-evaluation Frequency, periods of time are assigned the following seconds values:

Time	Seconds	Value
Day	86,400	
Week	604,800	
Month	2,628,000	

4. Click outside the element configuration window to apply your changes. After you add the segment, you'll notice the step indicates a count of the segment members.



After you activate the campaign, you can see the number of contacts who have entered the segment members step so far. See [Tracking segment members in your campaigns and programs](#) for more information.



## Cloud Feeder

[Oracle Eloqua AppCloud apps](#) extend Oracle Eloqua's functionality and allow you to integrate Oracle Eloqua with external systems. These apps rely on external systems and require additional configuration so that your campaign progresses even if the app is down or unresponsive. Oracle Eloqua prevents you from adding an app to the canvas if it is down or unresponsive. This prevents you from building a campaign that uses a broken or deactivated service.

**Note:** Your administrator must add AppCloud apps to your catalog and install them before you can start using them in your campaigns.

The [product documentation for these apps](#) will help you configure them.

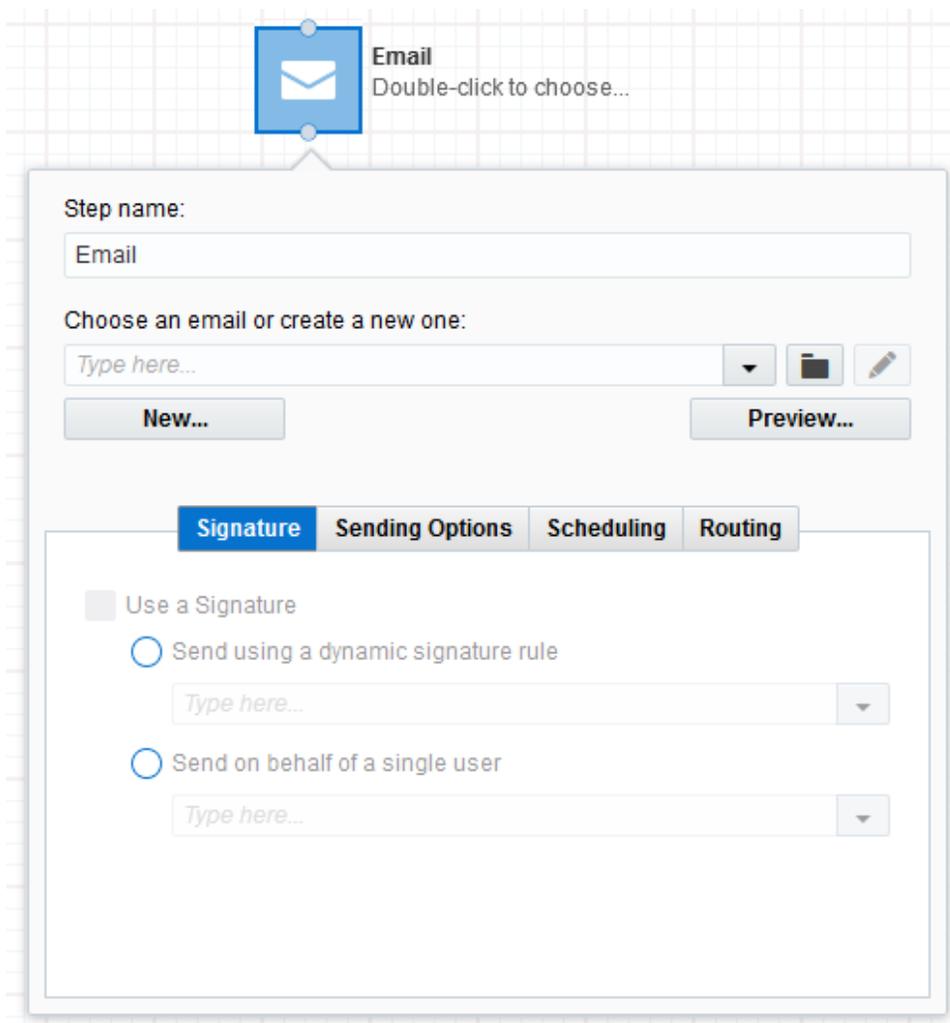
## Configuring campaign canvas elements: Assets

When you add assets to your campaign you are adding the elements with which your contacts will interact. The following is a list of the assets available on the campaign canvas:

- [Email](#)
- [SMS](#)
- [Form](#)
- [Landing Page](#)

### Email

Send your campaign members emails in your campaign flow.



## To configure the Email asset:

1. Type a new name into the **Step name** field.
2. Select an email from the drop-down list or click **Folder**  and browse to the email. To create a new email, click **New**.
3. Select additional configuration options by clicking on the corresponding tabs:
  - **Signature:** Enable the *Use a Signature* check box (optional), then select either *Send using a dynamic signature rule* or *Send on behalf of a single user*, and select an option from the corresponding drop-down list. [Learn more about signature rules](#). In addition, if a

signature layout was added to the email, the signature will be dynamically be populated based on the sender. [Learn more about signature layouts.](#)

The sender's user account does not need to be active nor does the person associated to the user account need to have access to Oracle Eloqua. The user account and associated signature fields will be used to populate the email sender and sender information like a signature where applicable. [Learn more.](#)

- **Sending Options:** Select the check box next to the sending options that you want to utilize for this email.
  - **Break send into smaller batches:** This option allows you to break the overall email send into smaller batches. Specify the number of hours or days and then choose the correct time unit.
  - **Allow emails to be re-sent to past recipients:** This option allows emails to be re-sent to past recipients of the same email.

 **Note:** In most cases, you will not want to select this option as it increases the likelihood that the recipient will report your email as spam. Only select this option if the email contains crucial or emergency information, or if a critical correction has been made to the content of the original email.

- **Include List-Unsubscribe header:** This option includes a group or global list-unsubscribe header with the default as the group unsubscribe option.
  - **Send email to master exclude members:** This option sends the email to contacts on the master exclude list. This ensures that members on this list do not miss out on critical non-marketing emails, such as product information.
  - **Send email to unsubscribed members:** This option sends the email to unsubscribed contacts, this ensures that unsubscribed members do not miss out on critical non-marketing emails, such as product information.
- **Scheduling:** Select the check box next to the scheduling option that you want to use for this email.

- **Only send during certain days and hours:** Select the days and the specific time range that you want to send the email. The default time zone is your local time zone.

If you would like to configure a batch send and distribute it evenly over a specific period, you must configure both the *Sending* and *Scheduling* options.

- Under *Sending Options*, select **Break into smaller batches** and specify the sending period in hours or days.
- Under *Scheduling*, select **Only send during certain days and hours** and specify the start and end time.

### Example

As part of your campaign, you want to send an email to 100,000 contacts over a five day period between 9:00 am - 5:00 pm ET so that a group of 20,000 contacts receives the email each day.

To configure the email options in your campaign:

1. Double-click the email element on the campaign canvas.
2. Click **Sending Options** and select **Break into smaller batches**. Set the *Sending Period* to 5 days.
3. Click **Scheduling** and select **Only send during certain days and hours**. Set the *Start Time* for 9:00 AM and *End Time* for 5:00 PM.

Your campaign is now configured to send the email to 20,000 contacts each day for the five day period.

- **Enable Send Time Optimization:** This option located under the *Scheduling* tab of an Email asset allows marketers to send emails at the optimal time for each contact. An email with Send Time Optimization enabled is indicated with  on the Campaign Canvas. Learn more about [Send Time Optimization](#).

**Important:** Effective June 12, 2025, [Oracle Eloqua's Advanced Intelligence \(AI\) features](#) are available for all customers. To enable Eloqua's classic and Generative AI

(Gen AI) functionality, open a service request with [Oracle Support](#). Please review our [product notice](#) for more information.

- **Optimization:** Select whether to **Optimize by time of day** or **Optimize by time of day and day of week** when sending the email. With *Optimize by time of day*, a contact will receive emails at the optimal time of day, within 24 hours of trigger. With *Optimize by time of day and day of week*, Eloqua will determine which combination of time of day and day of week is optimal for each contact, within the next 7 days of trigger.
- **Routing:** Enable the check box if you want to automatically route contacts excluded from the email send. Click **Choose** and specify a target.

## SMS

**Important:** This feature is only available if your organization has purchased SMS services. Please contact your account manager for additional information and pricing.

Send your campaign members SMS messages in your campaign flow.

**SMS**  
IND-SMS

Step name:  
SMS

Choose an SMS:  
IND-SMS

**i** You have chosen a Transactional SMS

**Phone Number** Sending Options Scheduling Routing

Send SMS messages to this Phone number

Mobile Phone (C\_MobilePhone)

Business Phone (C\_BusPhone)

### To configure the SMS asset:

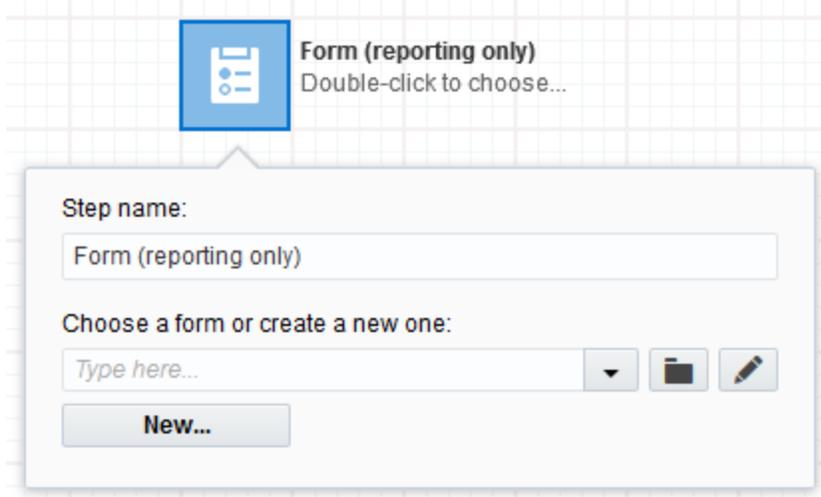
1. Type a new name into the **Step name** field.
2. Select an SMS message from the drop-down list or click **Folder**  and browse to the email. To create a new SMS message, click **New** .
3. Select additional configuration options by clicking on the corresponding tabs:
  - **Phone Number:** Select which phone number Eloqua should send the SMS message to. You can choose from two contact fields: Mobile Phone or Business Phone.

- **Sending Options:** Choose your sending options.
  - **Allow SMS to be re-sent to phone numbers previously sent to:** Select the check box to allow resending the SMS message to the same phone number. Additionally, you can specify the time period to check against for the resending option.

For example, if you select 2 months, this would prevent resending the same SMS message to the same phone number within the last 2 months. If the same message was sent 3 months ago, the message would resend.
  - **Send SMS to opted-out phone numbers:** If you have selected a transactional SMS message, select this check box to send this message to phone numbers that have opted-out of SMS communications. You must have permission to access this check box.
- **Scheduling:** Select the check box next to the scheduling option that you want to use for this SMS.
  - **Only send during certain days and hours:** Select the days and the specific time range that you want to send the SMS. The default time zone is your local time zone.
- **Routing:** Enable the check box if you want to automatically route contacts excluded from the SMS send. Click **Choose** and specify a target.

## Form

If you add an email that links to a form or to a landing page with a form, you can add that form to the campaign canvas for reporting purposes. After you add a form to the canvas, you do not connect it to other campaign elements. It is on the canvas so that it is visible to users and included in reporting.



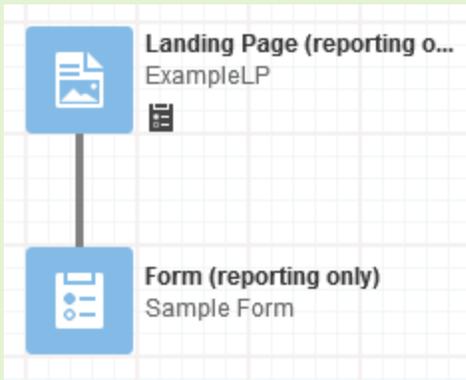
### To configure the Form asset:

1. Type a new name into the **Step name** field.
2. Select a form from the drop-down list, or click **Folder**  to browse to the form. To create a new form, click **New**.

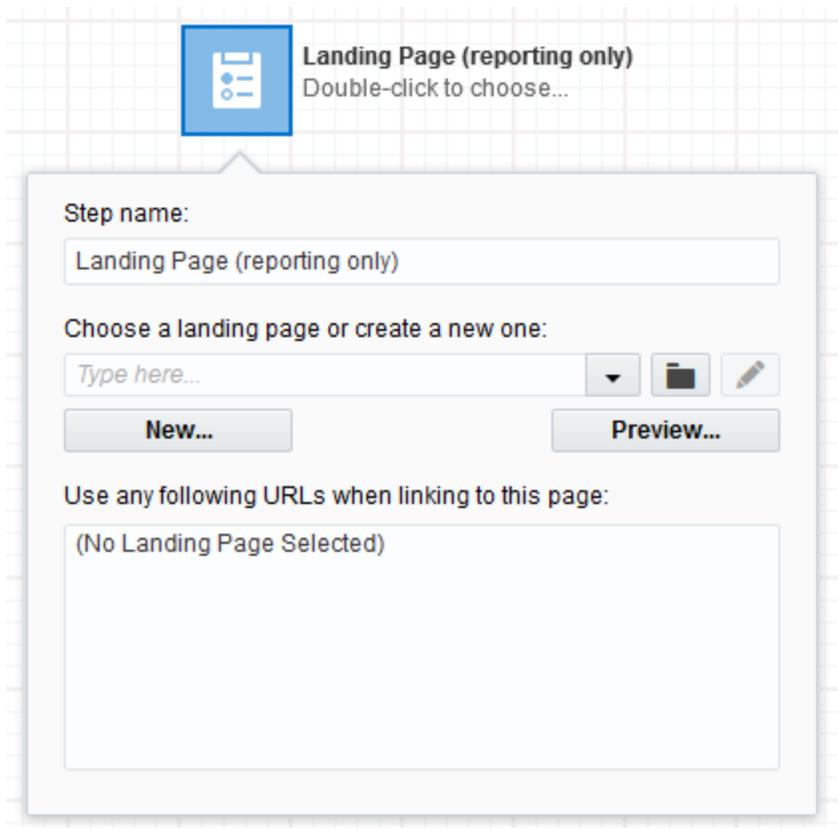
## Landing Page

If you add an email that links to a landing page, you can add that landing page to your campaign canvas. This allows you to include landing page activities in your campaign reports. After you add a landing page to the canvas, you do not connect it to other campaign elements. It is on the canvas so that it is visible to users and included in reporting.

**Note:** If a landing page on the canvas contains a form that is also on the canvas, Oracle Eloqua connects the two on the canvas to show the relationship.



**To configure the Landing Page asset:**



1. Type a new name into the *Step name* field.
2. Select a landing page from the drop-down list, or click **Folder**  to browse to the landing page. To create a new landing page, click **New**.

## Configuring campaign canvas elements: Decisions

When you add a decision element to your campaign, you are customizing the campaign experience for your contacts based on how they interact with your material. All decisions have a Yes path and No path. If the criteria of the decision is met, then the contact flows down the Yes path. If the criteria of the decision is not met, then the contact flows down the No path.

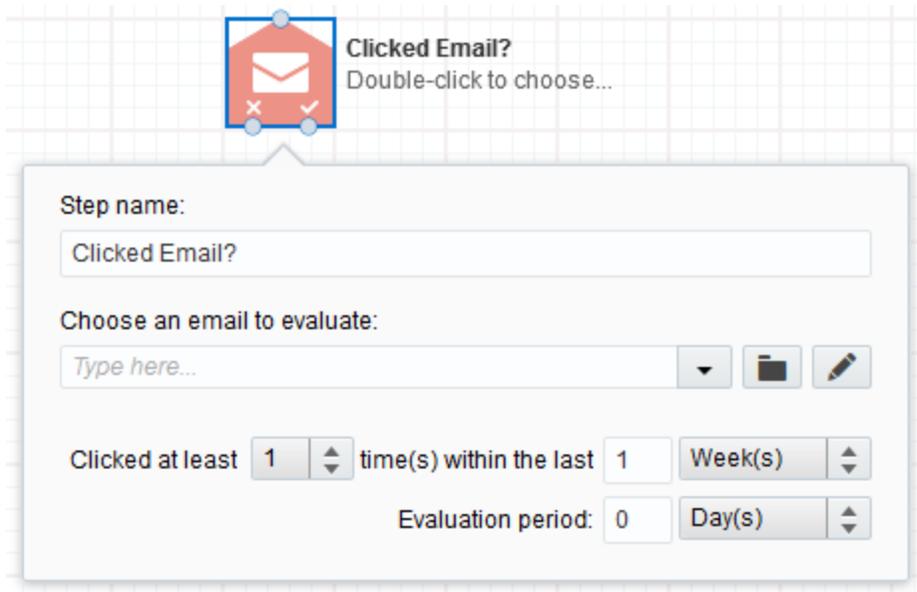
Date- and time-based decisions previously defaulted to Eastern Standard Time (UTC - 5:00). New Oracle Eloqua users will automatically default to their respective time zone, but current users must turn on this feature by logging a service request with [My Oracle Support](#). The feature cannot be reversed once enabled.

The following is a list of each Decision element available on the campaign canvas:

- [Clicked Email?](#)
- [Compare Contact Fields](#)
- [Compare Custom Object Fields](#)
- [Shared List Member?](#)
- [Shared Filter Member?](#)
- [Opened Email?](#)
- [Sent Email?](#)
- [Submitted Form?](#)
- [Visited Website?](#)
- [Audience Split](#)
- [Compare Date](#)
- [Clicked SMS?](#)
- [Replied to SMS?](#)
- [Sent SMS?](#)
- [Cloud Decision](#)

## Clicked Email?

Route contacts depending on whether they clicked through on any link in a selected email.



Clicked Email?  
Double-click to choose...

Step name:  
Clicked Email?

Choose an email to evaluate:  
Type here...

Clicked at least 1 time(s) within the last 1 Week(s)

Evaluation period: 0 Day(s)

### To configure the Clicked Email element:

1. Type a new name into the *Step name* field.
2. Select the email from the drop-down list, or click **Folder**  and browse to the email.
3. Set the evaluation details by selecting:
  - The minimum number of times that a link in the email was clicked, choose from the number drop-down list.
  - The time period during which it was clicked (*within the last...*), type a number in the box then choose if it is hours, days, weeks, or months.

- The *Evaluation period*, the time period in which you want to evaluate for this criterion.  
Type a number in the box, then specify if it is hours, days, weeks, or months.
  - If the evaluation period is set to 0, Oracle Eloqua will evaluate the contact immediately.
  - If the evaluation period is set for 24 hours or less, Oracle Eloqua will retry the evaluation every 10 minutes.
  - If the evaluation period is set for more than 1 day, Oracle Eloqua will retry the evaluation every 30 minutes.
  - If the evaluation period is set for more than 1 week, Oracle Eloqua will retry the evaluation once every hour.

## Compare Contact Fields

Evaluate and route contacts based on the values (or lack thereof) in a selected contact field.

**Compare Contact Fields**  
Criterion is not yet defined

Step name:  
Compare Contact Fields

Evaluate Contacts whose...  
Select a field

not Select an operator

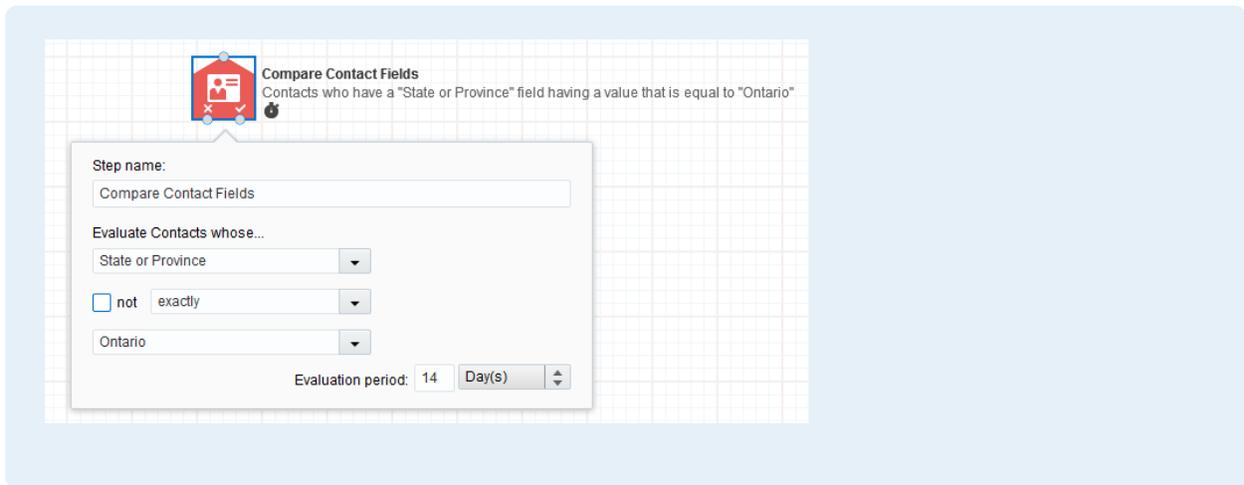
Evaluation period: 0 Day(s)

**To configure the Compare Contact Fields element:**

1. Type a new name into the *Step name* field.
2. In the *Evaluate Contacts whose* section, select values in each of the fields:
  - a. **Select a field:** Select a field from the drop-down list, or narrow the selection by typing the name in the field.
  - b. **Select an operator:** Select the operator for the comparison. this value tells Oracle Eloqua how you want to route the contacts based on the specified field. The operators vary depending on the field type that you selected. For instance, if you select *Date Created* as the field type, you might choose *Before* as the operator, to look for contact profiles created before a certain date. If the selected field is *Job Role*, the operator might be *Contains*, allowing you to search for a keyword in a contact's job title.
  - c. **Enter a value:** Type the value or select a value from the drop-down. This information is the point of comparison within the specified contact field.
3. Set the *Evaluation period*, the time period in which you want to evaluate for this criterion. Type a number in the box, then specify if it is hours, days, weeks, or months.
  - If the evaluation period is set to 0, Oracle Eloqua will evaluate the contact immediately.
  - If the evaluation period is set for 24 hours or less, Oracle Eloqua will retry the evaluation every 10 minutes.
  - If the evaluation period is set for more than 1 day, Oracle Eloqua will retry the evaluation every 30 minutes.
  - If the evaluation period is set for more than 1 week, Oracle Eloqua will retry the evaluation once every hour.



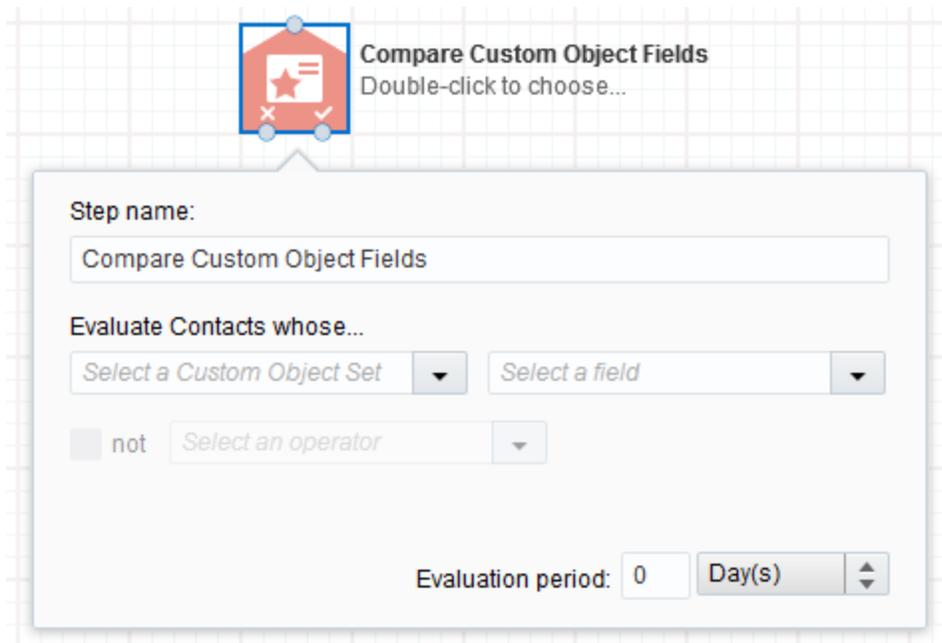
**Example:** In the image below, the *State or Province* field is being evaluated to find those contacts whose information is an exact match for the specified value, in this case, "Ontario." Contacts with "Ontario" in this field will be routes along the *Yes* path, and all other contacts will be routed along the *No* path (if there is one).



## Compare Custom Object Fields

Evaluate and route contacts based on values populated in the contact's linked custom object fields.

**Example:** You may have a custom field called "Salary" set as a picklist, and based on the value selected for a contact, add (or exclude) that contact from your segment.



### To configure the Compare Custom Object Fields element:

1. Type a new name into the *Step name* field.
2. In the *Evaluate Contacts whose* section, select values in each of the fields:
  - **Select a Custom Object Set:** Choose a custom object set from the drop-down list.
  - **Select a field:** Choose the field containing the data that you wish to use for comparison (filtering) purposes.
  - **Select an operator:** This value tells Oracle Eloqua how to route the contacts. The operators vary depending on the field type that you selected.
  - **Enter a value:** Type the value or select a value from the drop-down. This information is the point of comparison within the specified contact field.
3. Set the *Evaluation Period*, the time period in which you want to evaluate for this criterion. Type a number in the box, then specify if it is hours, days, weeks, or months.

- If the evaluation period is set to 0, Oracle Eloqua will evaluate the contact immediately.
- If the evaluation period is set for 24 hours or less, Oracle Eloqua will retry the evaluation every 10 minutes.
- If the evaluation period is set for more than 1 day, Oracle Eloqua will retry the evaluation every 30 minutes.
- If the evaluation period is set for more than 1 week, Oracle Eloqua will retry the evaluation once every hour.

## Shared List Member?

Evaluate and route contacts depending on whether they are in a selected contact list.

**Shared List Member?**  
Double-click to choose...

Step name:  
Shared List Member?

Choose a contact list to evaluate:  
Type here... [Dropdown] [Folder Icon] [Edit Icon]

Evaluation period: 0 [Day(s)]

### To configure the Shared List Member? element:

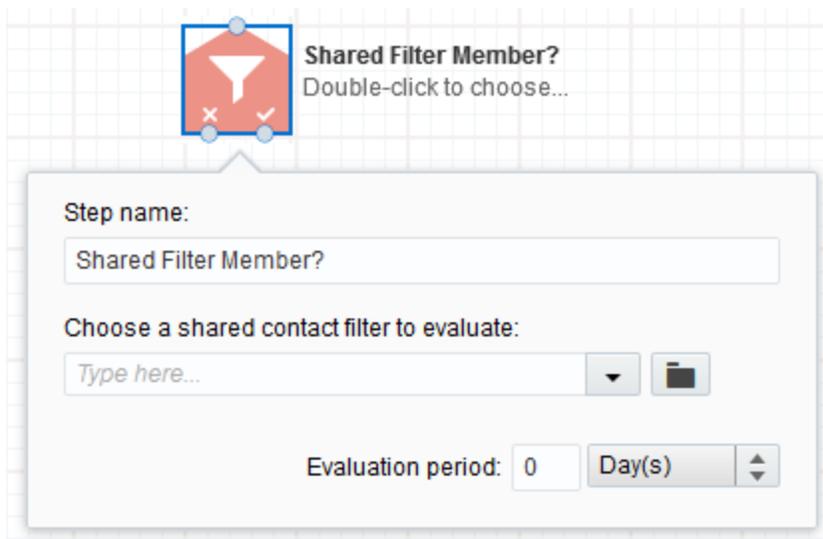
1. Type a new name into the *Step name* field.
2. Select the contact list from the drop-down list, or click **Folder**  and browse to the list.

3. Set the *Evaluation Period*, the time period in which you want to evaluate for this criterion. Type a number in the box, then specify if it is hours, days, weeks, or months.

- If the evaluation period is set to 0, Oracle Eloqua will evaluate the contact immediately.
- If the evaluation period is set for 24 hours or less, Oracle Eloqua will retry the evaluation every 10 minutes.
- If the evaluation period is set for more than 1 day, Oracle Eloqua will retry the evaluation every 30 minutes.
- If the evaluation period is set for more than 1 week, Oracle Eloqua will retry the evaluation once every hour.

## Shared Filter Member?

Evaluate and route contacts based on whether they are in a selected [shared filter](#).



To configure the **Shared Filter Member?** element:

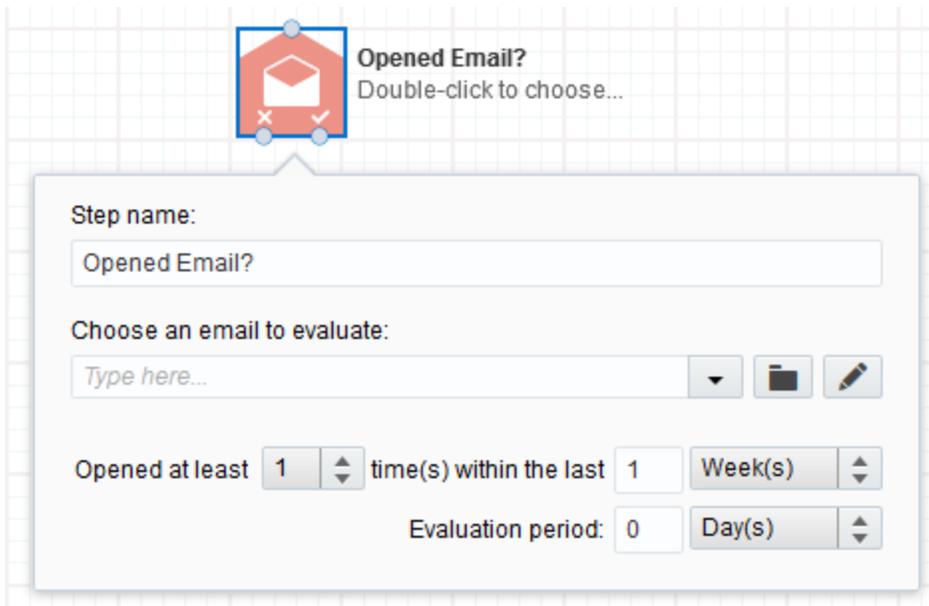
1. Type a new name into the *Step name* field.
2. Select a shared filter from the drop-down list, or click **Folder**  and browse to the list.

3. Set the *Evaluation Period*, the time period in which you want to evaluate for this criterion. Type a number in the box, then specify if it is hours, days, weeks, or months.

- If the evaluation period is set to 0, Oracle Eloqua will evaluate the contact immediately.
- If the evaluation period is set for 24 hours or less, Oracle Eloqua will retry the evaluation every 10 minutes.
- If the evaluation period is set for more than 1 day, Oracle Eloqua will retry the evaluation every 30 minutes.
- If the evaluation period is set for more than 1 week, Oracle Eloqua will retry the evaluation once every hour.

## Opened Email?

Evaluate and route segment members differently depending on whether they opened a specific email at least a selected number of times.



The image shows a configuration dialog for the 'Opened Email?' step. The dialog is titled 'Opened Email?' and has a subtitle 'Double-click to choose...'. It contains the following fields and controls:

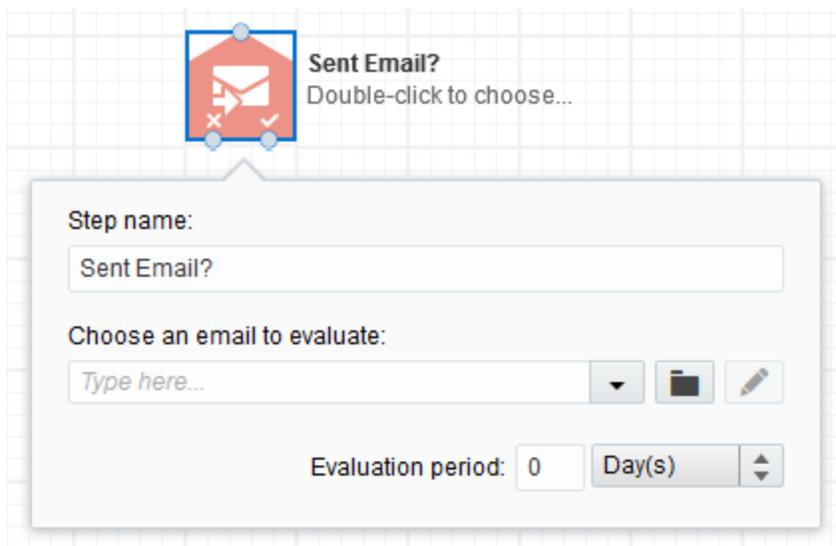
- Step name:** A text input field containing 'Opened Email?'.
- Choose an email to evaluate:** A dropdown menu with the placeholder text 'Type here...'. To the right of the dropdown are three icons: a downward arrow, a folder icon, and a pencil icon.
- Opened at least:** A numeric input field containing '1'.
- time(s) within the last:** A numeric input field containing '1'.
- Unit:** A dropdown menu currently set to 'Week(s)'.
- Evaluation period:** A numeric input field containing '0'.
- Unit:** A dropdown menu currently set to 'Day(s)'.

**To configure the Opened Email? element:**

1. Type a new name into the *Step name* field.
2. Select an email from the list, or click **Folder**  and browse to the email.
3. Set the evaluation details by selecting:
  - The minimum number of times that the email was opened. Choose from the number drop-down list.
  - The time period during which it was opened (*within the last...*). Type a number in the box then specify if it is hours, days, weeks, or months. .
  - The *Evaluation period*, the time period in which you want to evaluate for this criterion. Type a number in the box , then choose if it is hours, days, weeks, or months.
    - If the evaluation period is set to 0, Oracle Eloqua will evaluate the contact immediately.
    - If the evaluation period is set for 24 hours or less, Oracle Eloqua will retry the evaluation every 10 minutes.
    - If the evaluation period is set for more than 1 day, Oracle Eloqua will retry the evaluation every 30 minutes.
    - If the evaluation period is set for more than 1 week, Oracle Eloqua will retry the evaluation once every hour.

## Sent Email?

Evaluate and route contacts that have been sent a specific email separately from those that have not.



**Sent Email?**  
Double-click to choose...

Step name:  
Sent Email?

Choose an email to evaluate:  
Type here...   

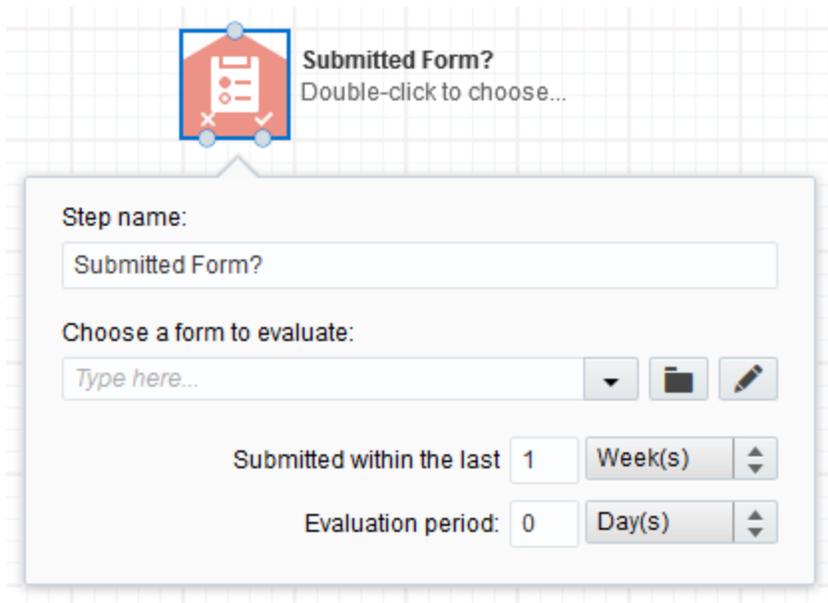
Evaluation period: 0 Day(s) 

## To configure the **Sent Email?** element:

1. Type a new name into the *Step name* field.
2. Select the email from the drop-down list, or click **Folder**  and browse to the email.
3. Set the *Evaluation Period*, the time period in which you want to evaluate for this criterion. Type a number in the box, then specify if it is hours, days, weeks, or months.
  - If the evaluation period is set to 0, Oracle Eloqua will evaluate the contact immediately.
  - If the evaluation period is set for 24 hours or less, Oracle Eloqua will retry the evaluation every 10 minutes.
  - If the evaluation period is set for more than 1 day, Oracle Eloqua will retry the evaluation every 30 minutes.
  - If the evaluation period is set for more than 1 week, Oracle Eloqua will retry the evaluation once every hour.

## Submitted Form?

Evaluate and route contacts that have submitted a specific form any number of times during an evaluation period.



### To configure the Submitted Form? element:

1. Type a new name into the *Step name* field.
2. Select the form from the drop-down list, or click **Folder**  and browse to the form.
3. Set the evaluation parameters by selecting the time period during which the form must have been submitted to be routed differently (*Sent within the last...*). Type a number in the box then choose if it is hours, days, weeks, or months.

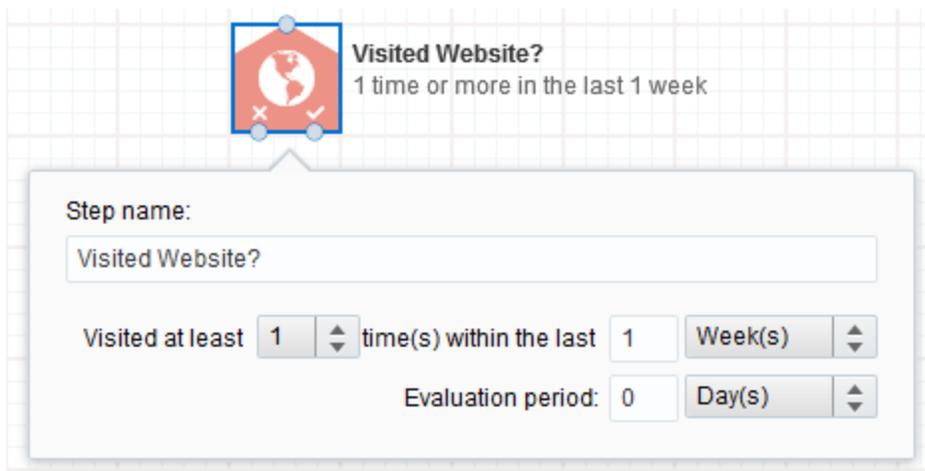
 **Example:** If you set the value as 1 week, Oracle Eloqua would route segment members that submitted a form during the past week separately from those that did not.

4. Set the *Evaluation period*, the time period in which you want to evaluate for this criterion. Type a number in the box, then specify if it is hours, days, weeks, or months.

- If the evaluation period is set to 0, Oracle Eloqua will evaluate the contact immediately.
- If the evaluation period is set for 24 hours or less, Oracle Eloqua will retry the evaluation every 10 minutes.
- If the evaluation period is set for more than 1 day, Oracle Eloqua will retry the evaluation every 30 minutes.
- If the evaluation period is set for more than 1 week, Oracle Eloqua will retry the evaluation once every hour.

## Visited Website?

Evaluate and route contacts that have viewed any page on your website at least a selected number of times during a specified period.



**Visited Website?**  
1 time or more in the last 1 week

Step name:  
Visited Website?

Visited at least 1 time(s) within the last 1 Week(s)

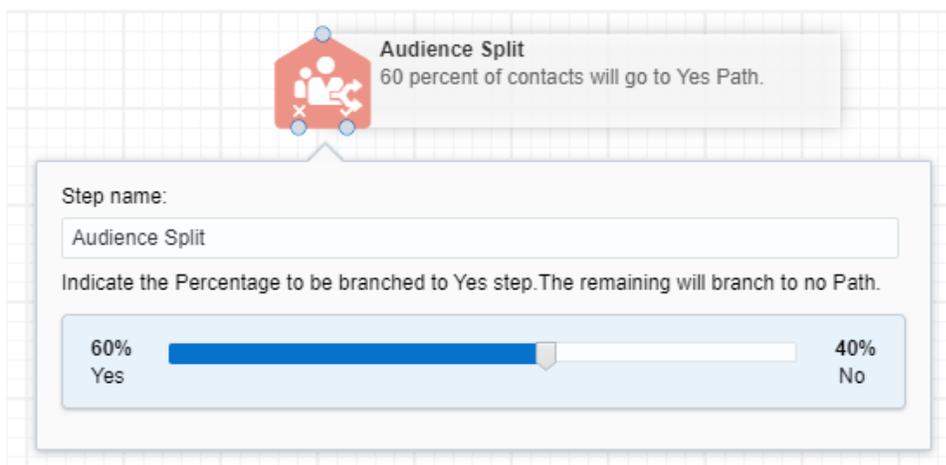
Evaluation period: 0 Day(s)

To configure the Visited Website? element:

1. Type a new name into the *Step name* field.
2. Set the evaluation details by selecting:
  - The minimum number of times that the website was visited, choose from the number drop-down list.
  - The time period during which it was visited (*within the last...*), type a number in the box then choose if it is hours, days, weeks, or months.
  - The *Evaluation period*, the time period in which you want to evaluate for this criterion. Type a number in the box then choose if it is hours, days, weeks, or months.
3. The *Evaluation period*, the time period in which you want to evaluate for this criterion. Type a number in the box, then specify if it is hours, days, weeks, or months.
  - If the evaluation period is set to 0, Oracle Eloqua will evaluate the contact immediately.
  - If the evaluation period is set for 24 hours or less, Oracle Eloqua will retry the evaluation every 10 minutes.
  - If the evaluation period is set for more than 1 day, Oracle Eloqua will retry the evaluation every 30 minutes.
  - If the evaluation period is set for more than 1 week, Oracle Eloqua will retry the evaluation once every hour.

## Audience Split

Split contacts down different paths by percentages.



The screenshot shows the configuration for an "Audience Split" step. At the top, a red icon with a white house and people symbol is next to the text "Audience Split" and "60 percent of contacts will go to Yes Path." Below this, a form contains the following elements:

- A "Step name:" label followed by a text input field containing "Audience Split".
- Instructional text: "Indicate the Percentage to be branched to Yes step. The remaining will branch to no Path."
- A horizontal slider control. The left side is labeled "60% Yes" and the right side is labeled "40% No". The slider bar is blue and is positioned at the 60% mark.

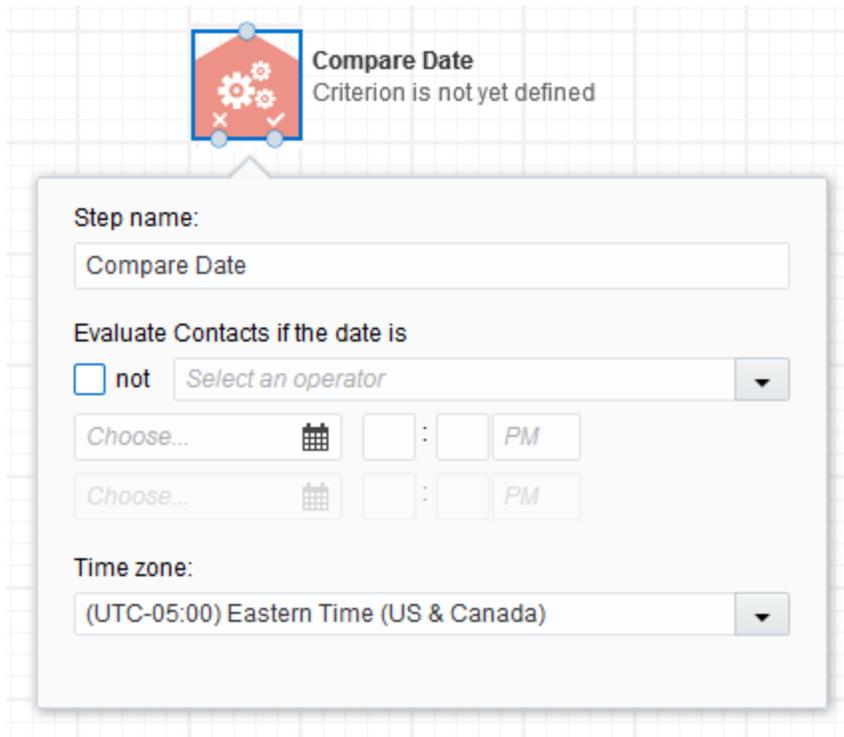
## To configure the Audience Split element:

1. Type a new name into the *Step Name* field.
2. Using the slider, indicate the percentage to be branched to Yes and No paths.

## Compare Date

Evaluate and route contacts on, before, or after a specific date, or during a period between two specified dates.

**Note:** This decision is not affected by any dates in a contact field or custom object field.



The image shows a configuration dialog for a "Compare Date" step. At the top left is a red house-shaped icon with gears and checkmarks. To its right, the text reads "Compare Date" and "Criterion is not yet defined". The dialog box contains the following fields:

- Step name:** A text input field containing "Compare Date".
- Evaluate Contacts if the date is**
  - not *Select an operator* (dropdown menu)
  - Choose...* (calendar icon) [ ] : [ ] *PM*
  - Choose...* (calendar icon) [ ] : [ ] *PM*
- Time zone:** A dropdown menu showing "(UTC-05:00) Eastern Time (US & Canada)".

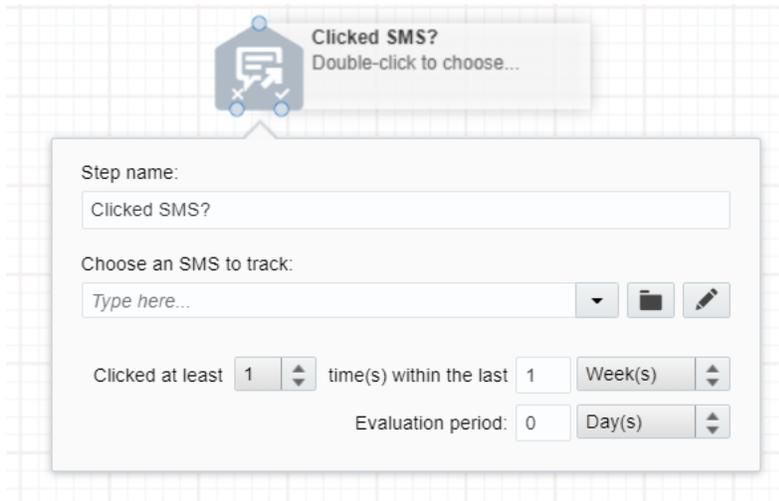
## To configure the Compare Date element:

1. Type a new name into the *Step Name* field.
2. Select an operator from the drop-down list. Your choices are: *before*, *after*, *on or before*, *on or after*, *on*, and *between*. Select to deselect the check box to reverse the operator.
3. Specify the date and time. If you select *between* as your operator, then you must specify two dates. The minimum level of a time period between two dates is 5 minutes.
4. Select a time zone from the drop-down box.

## Clicked SMS?

**Important:** This feature is only available if your organization has purchased SMS services. Please contact your account manager for additional information and pricing.

This step lets you route contacts based on whether or not they clicked on a link in the selected SMS message.



## To configure the Clicked SMS element:

1. Type a new name into the *Step name* field.
2. Select the SMS from the drop-down list, or click **Folder**  and browse to the SMS.
3. Set the evaluation details by selecting:
  - The minimum number of times that a link in the SMS was clicked. Choose from the number drop-down list.
  - The time period during which it was clicked (*within the last...*). Type a number in the box then choose if it is hours, days, weeks, or months.
  - The *Evaluation period*. The time period in which you want to evaluate for this criterion. Type a number in the box, then specify if it is hours, days, weeks, or months.
    - If the evaluation period is set to 0, Oracle Eloqua will evaluate the contact immediately.
    - If the evaluation period is set for 24 hours or less, Oracle Eloqua will retry the evaluation every 10 minutes.
    - If the evaluation period is set for more than 1 day, Oracle Eloqua will retry the evaluation every 30 minutes.

- If the evaluation period is set for more than 1 week, Oracle Eloqua will retry the evaluation once every hour.

## Replied to SMS?

**Important:** This feature is only available if your organization has purchased SMS services. Please contact your account manager for additional information and pricing.

This decision block evaluates incoming SMS replies. It can listen for specific keywords within those replies, which in turn lets you route your contacts down different paths.

The image shows a configuration window for a decision block titled "Replied To SMS?". The window is set against a light gray grid background. At the top, there is a red icon of a house with a speech bubble and a checkmark, with the text "Replied To SMS? Join us today!". Below this, the configuration fields are as follows:

- Step name:** A text input field containing "Replied To SMS?".
- Choose a message to evaluate:** A dropdown menu showing "Join us today!". To the right of the dropdown are three icons: a downward arrow, a folder, and a pencil.
- Choose a keyword to listen to:** A dropdown menu showing "START".
- Replied within the last:** A numeric input field with "1" and a "Day(s)" label with a spinner control.
- Evaluation period:** A numeric input field with "0" and a "Day(s)" label with a spinner control.

**To configure the Replied to SMS element:**

1. Type a new name into the *Step name* field.
2. Select the SMS from the drop-down list, or click **Folder**  and browse to the SMS message you'd like to evaluate.

3. *Choose a keyword to listen to:*

An SMS keyword is a word or phrase that your subscribers can text to an SMS code to interact with your SMS campaign. You can leverage this response activity and decide the next action based on what was expressed through the response keyword. Use this drop down to choose the keyword you'd like to evaluate with this decision step.

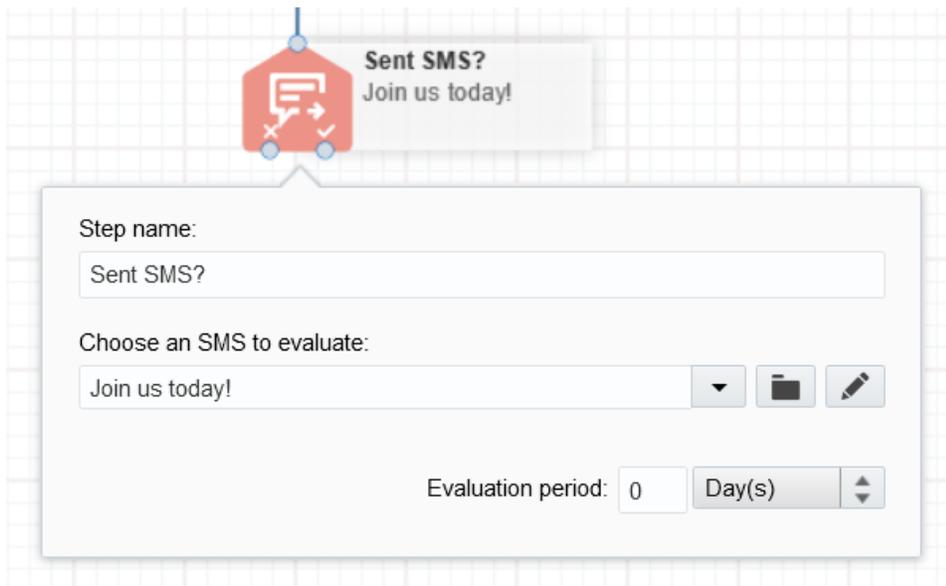
4. Set the evaluation details by selecting:

- *Replied within the last.* Set a limit for the time period during which the client replied to the message. Type a number in the box, then specify if it is hours, days, weeks, or months.
- The *Evaluation period.* The time period in which you want to evaluate for this criterion. Type a number in the box, then specify if it is hours, days, weeks, or months.
  - If the evaluation period is set to 0, Oracle Eloqua will evaluate the contact immediately.
  - If the evaluation period is set for 24 hours or less, Oracle Eloqua will retry the evaluation every 10 minutes.
  - If the evaluation period is set for more than 1 day, Oracle Eloqua will retry the evaluation every 30 minutes.
  - If the evaluation period is set for more than 1 week, Oracle Eloqua will retry the evaluation once every hour.

## Sent SMS?

**Important:** This feature is only available if your organization has purchased SMS services. Please contact your account manager for additional information and pricing.

This decision block evaluates outbound messages based on sent status.



### To configure the Sent SMS element:

1. Type a new name into the *Step name* field.
2. Select the SMS from the drop-down list, or click **Folder**  and browse to the message you'd like to evaluate.

3. Set the *Evaluation period*. The time period in which you want to evaluate for this criterion. Type a number in the box, then specify if it is hours, days, weeks, or months.

- If the evaluation period is set to 0, Oracle Eloqua will evaluate the contact immediately.
- If the evaluation period is set for 24 hours or less, Oracle Eloqua will retry the evaluation every 10 minutes.
- If the evaluation period is set for more than 1 day, Oracle Eloqua will retry the evaluation every 30 minutes.
- If the evaluation period is set for more than 1 week, Oracle Eloqua will retry the evaluation once every hour.

## Cloud Decision

Oracle Eloqua AppCloud apps extend Oracle Eloqua's functionality and allow you to integrate Oracle Eloqua with external systems. These apps rely on external systems and require additional configuration so that your campaign progresses even if the app is down or unresponsive. Oracle Eloqua prevents you from adding an app to the canvas if it is down or unresponsive. This prevents you from building a campaign that uses a broken or deactivated service.

**Note:** Your administrator must add AppCloud apps to your catalog and install them before you can start using them in your campaigns.

**To configure the Cloud Decision element:**

1. Enable the check box next to **Automatically route contacts with errors from cloud app** to prevent contacts from becoming "stuck" in an cloud decision step.
2. Click **Edit**  to configure the cloud decision. The configuration screen opens in a new tab.
3. Click **Save** and close the tab once you have completed your configuration.

**Note:** You cannot activate a campaign until you fully configure the campaign's AppCloud app.

## Configuring campaign canvas elements: Actions

When you add an *Action* element to a campaign you are specifying campaign details such as where and when contacts will be redirected, or if they will be added to a certain list or to another campaign.

The following is a list of each *Action* element available on the campaign canvas:

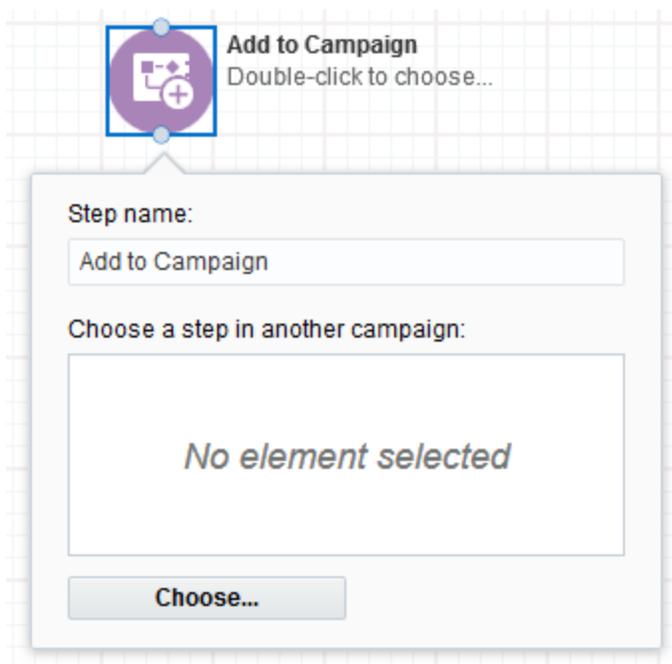
- [Add to Campaign](#)
- [Add to Program Builder](#)
- [Move to Campaign](#)
- [Add to Shared List](#)
- [Move to Program Builder](#)
- [Move to Shared List](#)
- [Wait](#)
- [Remove from Shared List](#)

- Add to Program
- Cloud Action
- Update Rules

## Add to Campaign

This element lets you add segment members from the current campaign to specific elements (including cloud step elements) in a different campaign for further routing and processing.

To configure the Add to Campaign element:



1. Type a new name into the **Step name** text box.
2. Click **Choose** to open the *Choose a Campaign Step* window.

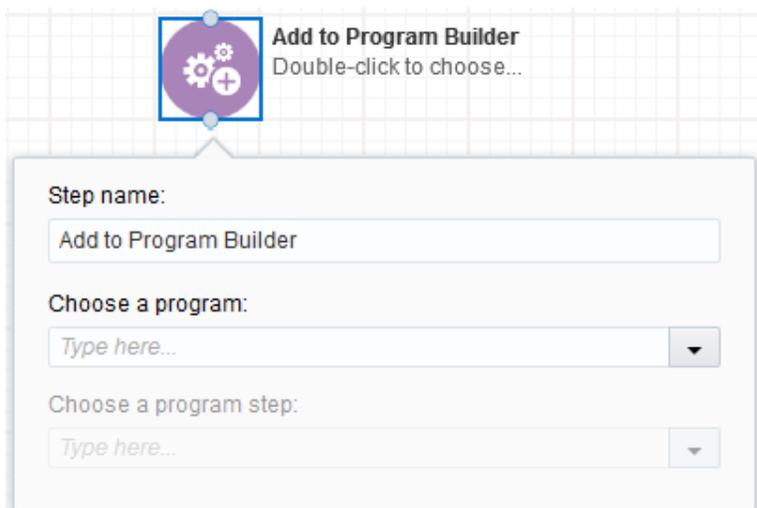
3. Select a campaign from the **Choose a campaign** drop-down list. The selected campaign opens.
4. Select the specific element in that campaign to which you want to send the members from your current campaign, then click **Choose**.

The window closes and the element from the other campaign appears in the *Add to Campaign* configuration window. The name of the added campaign and campaign element are now displayed in the new element.

## Add to Program Builder

This element lets you add segment members to a selected step in an automated marketing program for further routing and processing.

To configure the **Add to Program Builder** element:



**Add to Program Builder**  
Double-click to choose...

Step name:  
Add to Program Builder

Choose a program:  
Type here... ▼

Choose a program step:  
Type here... ▼

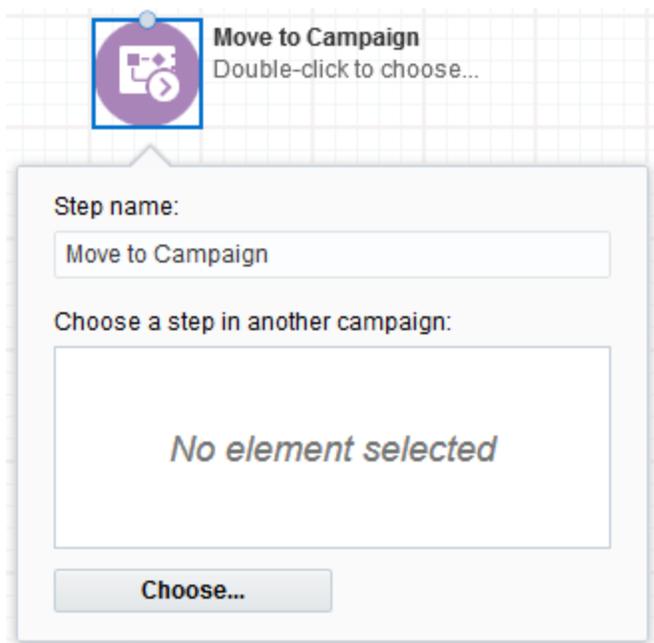
1. Type a new name into the **Step name** text box.
2. Select a program from the **Choose a program** drop-down list or type the name in the field.

3. Click a program step from the **Choose a program step** drop-down list. This is the specific step in the automated marketing program to which you want to send the campaign members.

## Move to Campaign

This element lets you move segment members from the current campaign to specific elements (including cloud step elements) in a different campaign for further routing and processing.

To configure the Move to Campaign element:



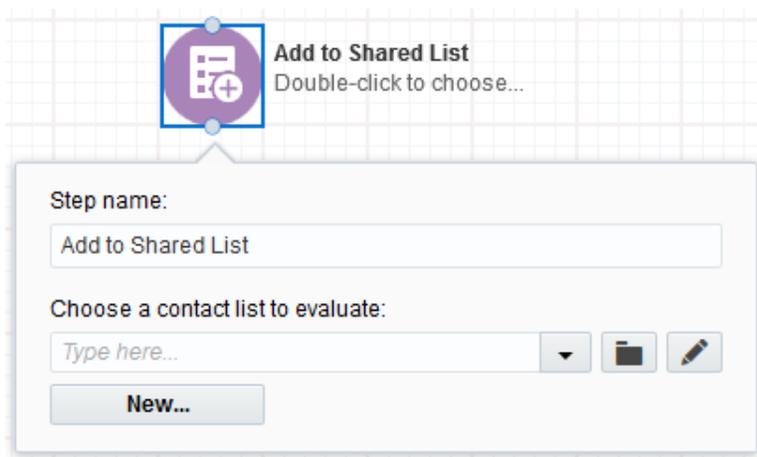
1. Type a new name into the **Step name** text box.
2. Click **Choose**. The *Choose a Campaign step* window opens.
3. Select a campaign from the **Choose a campaign** drop-down list. The selected campaign opens.

4. Click the specific element in that campaign to which you want to move the campaign members from your current campaign, then click **Choose**.

The window closes and the element from the other campaign appears in the *Move to Campaign* configuration window. The name of the other campaign and campaign element are now displayed in the new element.

## Add to Shared List

This element lets you add segment members in the current campaign to a shared contact list. Adding members to a shared list is a dynamic process. As contacts progress through the campaign steps, Oracle Eloqua adds them to the shared list that you have specified.

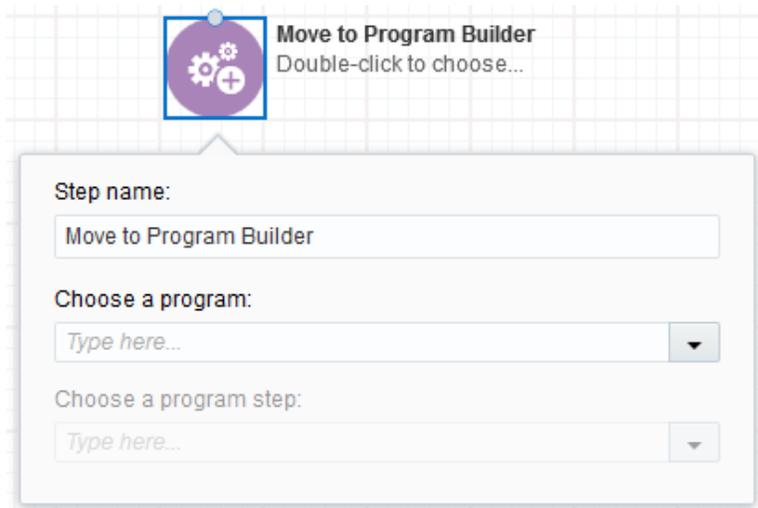


### To configure the Add to Shared List element:

1. Type a new name into the **Step name** text box.
2. Select a contact list from the **Choose a contact list to evaluate** drop-down list, or click **File Chooser**  and select one from the chooser. To create a new list, click **New**.
3. Click **Edit**  and configure the contact list.

## Move to Program Builder

This element lets you move campaign members to a program created using the [program builder](#).



The image shows a configuration dialog box for the 'Move to Program Builder' element. The dialog box is titled 'Move to Program Builder' and includes the instruction 'Double-click to choose...'. It contains three input fields: 'Step name' with the text 'Move to Program Builder', 'Choose a program' with a dropdown menu showing 'Type here...', and 'Choose a program step' with a dropdown menu showing 'Type here...'.

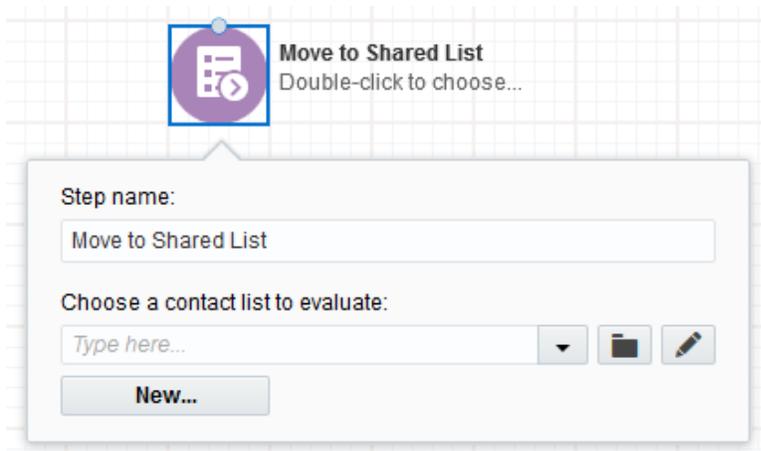
**To configure the Move to Program Builder element:**

1. Type a new name into the **Step name** text box.
2. Select a program from the **Choose a program** drop-down list, or type the name in the field.
3. Select a program step from the **Choose a program step** drop-down list. This is the specific step in the program to which you want to move the campaign members.

## Move to Shared List

This element lets you move segment members to a shared list that can be used by other marketers (users) in your organization in campaigns and segments.

To configure the Move to Shared List element:



1. Type a new name into the **Step name** text box.
2. Select a contact list from the **Choose a contact list to evaluate** drop-down list, or click **File Chooser**  and select one from the chooser. To create a new list, click **New**.

## Wait

This element allows you to specify how much time will elapse between steps of your campaign. You can also [set up a wait step notification](#) for when contacts enter the step.

 **Example:** If you want to send an email alerting contacts and prospects to register for an upcoming seminar, after the initial email step, you can add a wait step. You can specify an amount of time to wait (hours, days or weeks) before continuing on to the next step, perhaps sending a reminder to those who have not yet responded.

**Wait**  
1 Week

Step name:  
Wait

Choose how long contacts should wait in this step:

Wait for a set amount of time:  
1 Week(s)

Wait until a specific date and time:  
Choose... : PM  
Time zone:

Send a notification to the notification center when a contact enters the step

## To configure the Wait element:

1. Type a new name into the **Step name** text box.
2. Select one of the following options to determine how long the wait interval should be:
  - *Wait for a set amount of time*: Specify the number of hour(s), day(s), week(s) or month(s) for the wait period.
  - *Wait until a specific date and time*: Set a specific date and time as the target wait period. Confirm the correct time zone is selected.

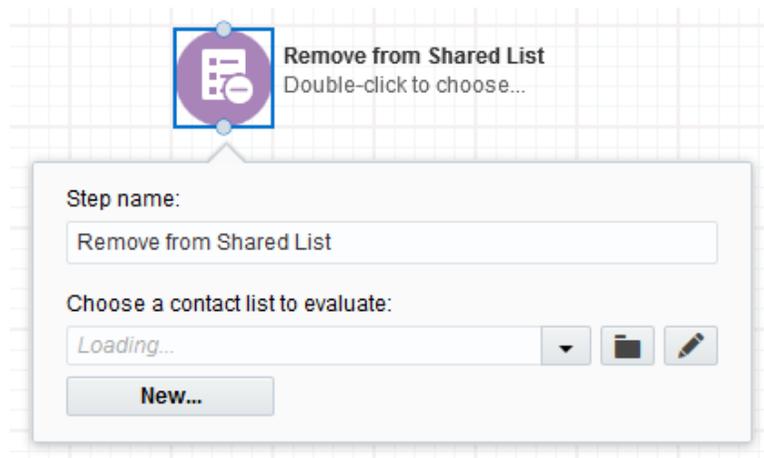


**Note:** If Daylight Savings Time affects your time zone, a message shows you how the time will be adjusted.



## Remove from Shared List

This element lets you remove segment members from a shared list used by other marketers (users) in your organization in campaigns and segments.

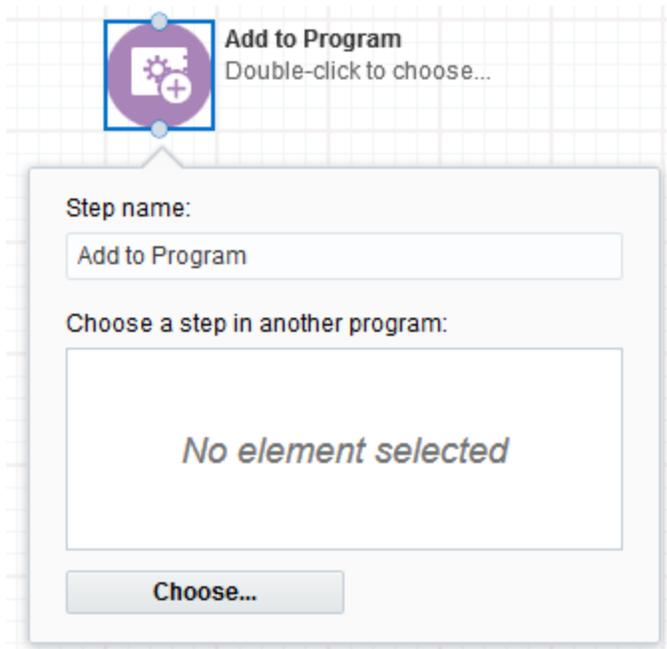


**To configure the Remove from Shared List element:**

1. Type a new name into the **Step name** text box.
2. Select a contact list from the **Choose a contact list to evaluate** drop-down list, or click **File Chooser**  and select one from the chooser.

## Add to Program

This element lets you add segment members to a selected step in an existing program, built using the [program canvas](#).



### To configure the Add to Program element:

1. Type a new name into the **Step name** text box.
2. Click **Choose** to open the *Choose a Program Step* window.
3. Select a campaign from the **Choose a Program** drop-down list. The selected program opens.

4. Select the specific element in that program to which you want to send the members from your current campaign, and then click **Choose**.

The window closes and the element from the other campaign appears in the *Add to Program* configuration window. The name of the added program and the program element are now displayed in the new element.

## Cloud Action

**Oracle Eloqua AppCloud apps** extend Oracle Eloqua's functionality and allow you to integrate Oracle Eloqua with external systems. These apps rely on external systems and require additional configuration so that your campaign progresses even if the app is down or unresponsive. Oracle Eloqua prevents you from adding an app to the canvas if it is down or unresponsive. This prevents you from building a campaign that uses a broken or deactivated service.

**Note:** Your administrator must add AppCloud apps to your catalog and install them before you can start using them in your campaigns.

### To configure the Cloud Action element:

1. Enable the check box next to **Automatically route contacts with errors from cloud app** to prevent contacts from becoming "stuck" in a cloud action step.
2. Click **Edit**  to configure the cloud action.
3. Configure the element as desired.

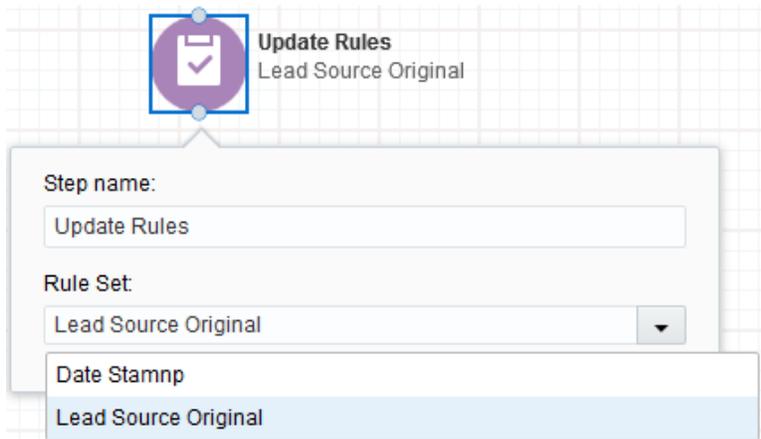
- a. **Scheduling:** Select the days and the specific time range that you want to send the email.
- b. **Routing:** Enable the check box if you want to automatically route contacts excluded from the email send. Click **Choose** and specify a target.

4. Click **Save** and close the tab once you have completed your configuration.

**Note:** You cannot activate a campaign until you fully configure the campaign's AppCloud app.

## Update Rules

Move contacts through a rule set in order to update contact fields or custom object records.



**To configure the Update Rules element:**

1. Type a new name into the **Step name** text box.
2. Select a rule set from the **Rule Set** drop-down list or type the name in the field.

# Campaign reporting and metrics

After you've launched a multi-step campaign or simple email campaign, you can use various metrics to measure the campaign's performance.

**Important:** Campaign operational reports only report on the last 3 months of campaign data. If you need to look further back into a campaign's history, use [Insight reports](#) or [Oracle Eloqua dashboards](#)

## Accessing operational reports from a campaign

You can access reports directly from a campaign. If you want to report on multiple campaigns or report on a campaign's performance beyond the last 3 months, you should use [Insight reports](#).

### To access the operational reports:

1. Navigate to **Orchestration** , then click **Campaigns**.
2. Open the campaign you want to report on.
3. Choose an option:
  - From the campaign canvas, click  **Operational Reports** on the right side.
  - From a simple campaign or A/B testing campaign, in the classic UI click **Actions**  and then click **Operational Reports**. In the Redwood experience, click **View Operational Reports**.

**Tip:** You can [download the Campaign Entry and Campaign Exit reports](#) to a .csv or Microsoft Excel file. To view and export a report of segment members within a campaign, see [Viewing segment members in campaigns and programs](#).

## Overview of campaign operational reports

**Note:** You must have the *View Operational Reports* [action permission](#) to access operational reports.

The following table describes the reports available from a campaign:

Report	Description
Campaign Audit	The campaign audit provides a history of a campaign's creation, modification, activation, or deactivation. You can use this report to see who made changes and when. If you have a large team of marketers creating campaigns in Oracle Eloqua, the audit can help ensure transparency and organizational visibility.
Campaign Email Statistics	<p>The email statistics report displays recent activity for any emails that are a part of a campaign.</p> <p>This report shows the frequency and success rate of email delivery and performance (such as opens, clickthroughs, etc.).</p> <p>If your campaign has multiple emails being sent at different points, the report can offer information about to which emails are generating interest or keeping people's attention, and which emails are being ignored or otherwise prompting contacts to unsubscribe.</p>

Report	Description
	<p>Overall, use this report as a spot-check to ensure that your campaign is working.</p>
Campaign Entry	<p>The campaign entry report shows how and when contacts entered a campaign.</p> <p>The primary ways a contact enters a campaign are from segments, from other campaigns and programs, or from form processing. However, this report can show additional ways such as through a custom object set or cloud feeder.</p> <p>Use this report to ensure that your campaign is performing correctly, and that contacts are entering the campaign from the intended sources.</p>
Campaign Exit	<p>The campaign exit report shows how and when contacts exited a campaign.</p> <p>Use this report to ensure you understand why contacts exited a campaign, ensure that the campaign is performing as expected, and that contacts are flowing the correct campaign path.</p>
Campaign SMS Statistics	<div data-bbox="618 1062 1425 1360" style="background-color: #fff9c4; padding: 10px; border: 1px solid #ccc;"> <p><b>Important:</b> This feature is only available if your organization has purchased SMS services. Please contact your account manager for additional information and pricing.</p> </div> <p>The SMS statistics report displays recent activity for any SMS messages that are a part of a campaign.</p> <p>This report shows the frequency and success rate of SMS delivery and performance (such as received, clickthroughs, and so on).</p>

Report	Description
	<p>If your campaign has multiple SMS messages being sent at different points, the report can offer information about which SMS messages are generating interest or generating engagement, and which messages are being ignored or otherwise prompting contacts to unsubscribe.</p> <p>Overall, use this report as a spot-check to ensure that your campaign is working.</p>
Stuck Records Report	<div data-bbox="618 751 1425 926" style="background-color: #fff9c4; padding: 10px; border: 1px solid #ccc;"> <p><b>Important:</b> Phased rollout of the Stuck Records Report will begin in release 25C.</p> </div> <p>The stuck records for the selected canvas from the <a href="#">Stuck Records Report (All Canvases)</a>.</p>

## Understanding campaign performance metrics

The following table describes the metrics used to measure campaign performance. For multi-step campaigns, these metrics are available from the Campaign Email Statistics report. For simple email campaigns or A/B testing campaigns, you can view these metrics once your email is sent.

**Tip:** For multi-step campaigns, you cannot view form performance rates from the Campaign Email Statistics report. To view form performance information for a multi-step campaign, use [Insight reports](#).

## SMS metrics

Metric	Description
Sent	The total SMS messages sent.
Failed	The total number of failed messages. Failed messages were not sent at all. A message failure could be a skipped message (no code available for the country) or an error with the SMS service.
Delivered	The total SMS messages delivered.
Hard Bounceback	<p>The total messages that returned a hard bounceback. A hard bounce is a message that permanently could not be delivered.</p> <p>A common reason for hard bounces includes an invalid phone number.</p> <p>For more information, see <a href="#">About bounces</a>.</p>
Soft Bounceback	<p>The total messages that returned a soft bounceback. A soft bounce is a message that temporarily could not be delivered. These bounces may still be delivered at another time.</p> <p>For more information, see <a href="#">About bounces</a>.</p>
Clickthrough	The total clickthroughs. This includes multiple clicks by the same recipient. System Action links are not tracked.
Unique Clickthroughs	The total recipients that clicked at least one tracked link in an SMS message. One clickthrough is counted for each recipient that clicked a link in the SMS.
Opt-Out (Keywords)	The total opt-out responses received.

## Email metrics

Metric	Description
Sent	The total emails sent.
Total Delivered	The total emails delivered. (Total Sends - Total Bouncebacks)

Metric	Description
	<p><b>Note:</b> A sent email is considered delivered unless the receiving ISP reports a bounceback. Because there can be delays in the ISP sending that bounceback report, the total delivered emails may change over time.</p>
Hard Bounces	<p>The total emails that returned a hard bounceback. A hard bounce is an email that permanently could not be delivered.</p> <p>Some common reasons for hard bounces include an invalid email address or domain name for email messages.</p> <p>For more information, see <a href="#">About bounces</a>.</p>
Soft Bounces	<p>The total messages that returned a soft bounceback. A soft bounce is a message that temporarily could not be delivered. This could mean that the email address is valid, but the recipient's inbox was full, the mail server was unavailable, or the email message was too large. These bounces may still be delivered at another time.</p> <p>For more information, see <a href="#">About bounces</a>.</p>
Delivery Rate	<p>The total emails delivered divided by the total emails sent. (Total Delivered / Total Sent)</p>
Total Opens	<p>The total opens by email recipients (original recipients or email forwards). An open is counted every time the email is opened.</p>
Unique Opens	<p>The total recipients (original recipients or email forwards) that opened an email at least once. One open is counted for each recipient that opened the email.</p>
Open Rate	<p>The total opens divided by the total number of times an email was delivered. (Total Opens / Total Delivered)</p>
Total Clicks	<p>The total clickthroughs. This includes multiple clicks by the same recipient. System Action links are not tracked.</p>
Unique Clickthroughs	<p>The total recipients (original recipients or email forwards) that clicked at least one tracked link in an email. One clickthrough is</p>

Metric	Description
	counted for each recipient that clicked a link in the email.
Click-Through Rate (CTR)	The total clickthroughs divided by the total number of times an email was delivered. (Total Clickthroughs / Total Delivered)
Unsubscribed	The total email recipients that unsubscribed (globally or spam unsubscribed).
Conversions or Total Submits	<p>The total forms submitted. This includes multiple submissions by the same contact.</p> <div data-bbox="493 726 1427 961" style="background-color: #e1f5fe; padding: 10px; border-radius: 5px;"> <p><b>Note:</b> This is only available for simple campaigns or A/B testing campaigns. To view form performance information for a multi-step campaign, use <a href="#">Insight reports</a>.</p> </div>
Campaign Conversion Rate	<p>The total forms submitted divided by the number of times the form was viewed. (Total Form Submissions / Total Form Views)</p> <div data-bbox="493 1167 1427 1339" style="background-color: #e1f5fe; padding: 10px; border-radius: 5px;"> <p><b>Note:</b> This is only available for simple campaigns or A/B testing campaigns.</p> </div>
Total Visits	<p>The total visits to a landing page associated with the email.</p> <div data-bbox="493 1461 1427 1635" style="background-color: #e1f5fe; padding: 10px; border-radius: 5px;"> <p><b>Note:</b> This is only available for simple campaigns or A/B testing campaigns.</p> </div>

# Stuck Records Report (All Canvases)

**Important:** Phased rollout of the Stuck Records Report will begin in release 25C.

## To view the Stuck Records Report for all canvases:

1. Navigate to **Orchestration** , then click **Campaigns** or **Programs**.
2. Click **Actions > Stuck Records Report**
3. Stuck records for the last 3 days are displayed by default, select evaluation period to see stuck records for up to the last 3 months
4. To download the report to a .csv or Microsoft Excel file, click **Export**. A link to the export file will be emailed.

The stuck records report includes data on the canvas steps with stuck records and runs daily with the following criteria:

- Entered step within the last three months
- For App steps: Records have been in the step for 24 hours or more
- For Native steps: Records that do not have a next evaluation set

The report details the following information:

- **Canvas Type:** The type of canvas.
- **Canvas Id:** The Id of the canvas.
- **Canvas Name:** The name of the canvas.

- **Step ID:** The id of the step.
- **Step Type:** The type of step.
- **Step Name:** The name of the step.
- **Status:** The status of records stuck in the step.
- **Cloud App Name:** The name of the app, if the step is an app step.
- **Total Records:** The total number of records stuck in the step with the indicated status.
- **Earliest Step Entry Time:** The earliest step entry time for records stuck in the step.
- **Latest Step Entry Time:** The latest step entry time for records stuck in the step.

## Exporting campaign entry or exit reports

**Note:** You must have the *View Operational Reports* [action permission](#) to access operational reports.

You can export the Campaign Entry and Campaign Exit operational reports directly from a campaign. These reports detail how and when contacts entered or exited a simple or multi-step campaign.

**Important:** Campaign operational reports only report on the last 3 months of campaign data. If you need to look further back into a campaign's history, use [Insight reports](#) or [Oracle Eloqua dashboards](#)

**Tip:** To view and export a report of segment members in a multi-step campaign, see [Viewing segment members in campaigns and programs](#).

## To export a campaign entry or exit report:

1. Navigate to **Orchestration** , then click **Campaigns**.
2. Open the campaign you want to report on.
3. Choose an option:
  - From the campaign canvas, click  **Operational Reports** on the right side.
  - From a simple campaign or A/B testing campaign, in the classic UI select **Actions**  and then click **Operational Reports**. In the Redwood experience, click **Operational Reports**.
4. Choose the entry or exit report.
5. Choose a date range from the **Evaluation period** drop-down.
6. In the classic UI, click **Export**. In the Redwood experience, click  **Export**.
7. Configure the export window and click **Export**.

A link to download the export data will be sent to the specified email address. The export is available from that link for 14 days.

## Viewing the step members report

You can use the step members report to see which contacts are currently in a campaign or program step. You can view information about the contact as well as their status (for

example, awaiting action), when the contact entered the step, and so on. Use this report to spot-check the step and its current contacts, troubleshoot your campaign or program, or export it for further analysis.



**Example:** Seeing a lot of contacts in an email element or action step but unsure if they're successfully executing? Check the *Status* column to look for possible setbacks. In the image below, bouncebacks and unsubscribes explain why emails were not delivered to certain contacts.

Em	Fir	Las	Titl	Cor	Bu:	Ad:	Cit:	Sal	Status	Entry Time	Next Evaluation
chris	TES	C							Excluded from Email: Bounceback	3 days ago	
chris	third	chris							Excluded from Email: Unsubscribe	3 days ago	
chris	fourth	chris							Excluded from Email: Unsubscribe	3 days ago	
dam	Darr	All							Excluded from Email: Bounceback	3 days ago	

## To view a step members report:

1. In the campaign canvas or program canvas, double-click the number of contacts on a decision or action step.



The step members report opens.

View Campaign Step Members									
Campaign Name: Example Campaign		Displaying 200 of 5,000 total member(s)				<input type="text" value="Enter search term"/>			
Step Name: Compare Contact Fields		<input type="checkbox"/> Select All Contacts <span style="float: right;">Contact View   General Contact Fields</span>							
First Name	Last Name	Title	Business Phone	Address 1	City	Industry	Status	Email Address	Enter
Talia	Stoff		(563)185-5003	2000 Clifford Garden	Keelerbury	Please Select...	Awaiting action	talia.stoff@salesforce.com	
Lily	Manke		828-610-0167	5790 Stark Hollow	Vilashine	Please Select...	Awaiting action	lily.manke@salesforce.com	
Halley	Von		395-854-3553	274 Austin Way	Vivianfort	Please Select...	Awaiting action	halley.von@salesforce.com	
Celine	King		(271)631-6244	655 Borer Court	Ellenborough	Please Select...	Awaiting action	celine.king@salesforce.com	
Coy	Carroll		148-626-0832	655 Stehr Station	East Akayna	Please Select...	Awaiting action	coy.carroll@salesforce.com	
Matalyn	Fadel		130-626-1369	74964 Furs Fall	South Zolastor	Please Select...	Awaiting action	matalyn.fadel@salesforce.com	
Felisa	Herzog		679-146-2600 x948	719 Wonder Mills	Jacksonhaven	Please Select...	Awaiting action	felisa.herzog@salesforce.com	
Luciano	Willing		(844)254-2564	6776 Green Canyon	Luluville	Please Select...	Awaiting action	luciano.willing@salesforce.com	
Tyler	Schmitt		1-776-664-8553 x860	305 Baumback Roads	Traulerfort	Please Select...	Awaiting action	tyler.schmitt@salesforce.com	
Carroll	Remmer		1-855-613-2155	797 Rashad Pike	New Heavenb	Please Select...	Awaiting action	carroll.remmer@salesforce.com	
Isabel	Monahan		949-956-3843 x118	55932 Querna Hills	New Magal	Please Select...	Awaiting action	isabel.monahan@salesforce.com	
Randal	Glover		1-749-300-8798 x898	87913 Strama Islands	Rueckenmouth	Please Select...	Awaiting action	randal.glover@salesforce.com	
Lily	Spencer		(648)431-3177	486 Runte Street	Uptonburgh	Please Select...	Awaiting action	lily.spencer@salesforce.com	
Weldon	Smith		1-790-348-8752 x261	19524 Feest Ways	Port Parafort	Please Select...	Awaiting action	weldon.smith@salesforce.com	
Louvena	Walker		1-211-940-6384	469 Irma Wall	Port Mariana	Please Select...	Awaiting action	louvena.walker@salesforce.com	
Halley	Volkman		(714)616-8943 x593	758 Khalil Meadows	West Annelle	Please Select...	Awaiting action	halley.volkman@salesforce.com	
Scotty	Stroman		616-610-3124 x96771	580 Odessa Mission	New Giovanni	Please Select...	Awaiting action	scotty.stroman@salesforce.com	
Kennedy	Goltsber		(771)375-0199 x11676	2573 Spencer Prairie	West Mylambor	Please Select...	Awaiting action	kennedy.goltsber@salesforce.com	
Altaga	Luefgen		398-237-0598	34181 Ali Hill	Schmelenches	Please Select...	Awaiting action	altaga.luefgen@salesforce.com	
Malcolm	Zeme		115-100-6488 x1224	407 Davon Drive	Stockton	Please Select...	Awaiting action	malcolm.zeme@salesforce.com	
Courtney	Orkon		669-305-8591 x52444	300 Willis Path	East Zula	Please Select...	Awaiting action	courtney.orkon@salesforce.com	
Aubrey	Stroman		1-982-952-6103 x059	480 Skylar Hill	South Raymor	Please Select...	Awaiting action	aubrey.stroman@salesforce.com	
Anne	Zeme		616-562-9124 x67565	15345 Margat Ridge	Lacychester	Please Select...	Awaiting action	anne.zeme@salesforce.com	
Angie	Furns		1-781-876-2362 x71962	55209 Jessy Cape	Port Jeronymo	Please Select...	Awaiting action	angie.furns@salesforce.com	
Meredith	Conn		960-615-5056 x31590	55532 Deriso, Way	Lariville	Please Select...	Awaiting action	meredith.conn@salesforce.com	

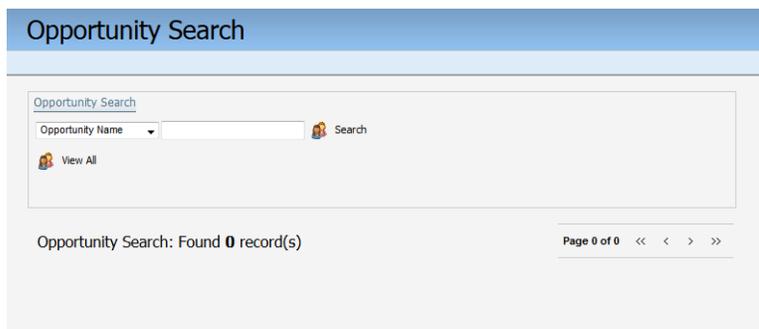
- To refresh the report, click **Refresh**. When you refresh, the contacts in the step may change.
- To download the report to a .csv or Microsoft Excel file, click **Export**. A link to the export file will be emailed.

# Search for existing opportunities

From the *Campaigns* area in the application, you can upload opportunities, manage general settings for opportunities, and search for specific opportunities.

## To search for existing opportunities:

1. Navigate to **Orchestration** , then click **Campaigns**.
2. Open the Opportunity search:
  - In the classic UI, click **Actions** , then click **Opportunity Search**.
  - In the Redwood experience, click **Actions > Search Opportunities**.



Opportunity Search

Opportunity Search

Opportunity Name  Search

View All

Opportunity Search: Found 0 record(s)

Page 0 of 0 << < > >>

3. You can either search for an existing opportunity by one of several different field values. Select one of the following values:
  - **Opportunity Name:** Search on all or part of the name of the opportunity.
  - **Stage:** Search on all or part of the name of the opportunity stage (this depends on the values you used to set up opportunities, but may be values such as Lost, Closed, SQL, MQL, and so on).
  - **Probability Of Closing:** These values correspond to the values assigned to each opportunity stage.
  - **Date Created:** Use the date in the standard system format. In most cases, this will be MM/DD/YYYY unless an override is set.
  - **Close Date:** Use the date in the standard system format. In most cases, this will be MM/DD/YYYY unless an override is set.

Alternatively, click **View All** to see all the available campaign opportunities in the system

4. Fill in the full or partial search value, then click **Search**.

Matching opportunities in the system are listed. You can click on any opportunity in the list to see the details for that opportunity.

# Configuring opportunity settings

**Important:** Opportunity settings are used as part of your CRM integration. Typically organizations work with Oracle or with Oracle partners to ensure a successful CRM integration. Find out more about [Oracle's implementation services](#).

From the *Campaigns* area in the application, you can upload opportunities, manage general settings for opportunities, and search for specific opportunities.

## To configure opportunity settings:

1. Navigate to **Orchestration** , then click **Campaigns**.
2. Open opportunity settings:
  - In the classic UI, click **Actions** , then click **Opportunity Settings**.
  - In the Redwood experience, click **Actions** > **Edit Opportunity Settings**.

## Opportunity Settings

---

Contact to Opportunity Association

The **attribution** method used to associate contacts to Opportunities is: **All contacts for the Account that has been associated to the Opportunity**  Edit

Opportunity Stage Details

All Opportunities are fully created and managed in the CRM system.

 Add New Opportunity Stage

	Stage Name	Probability of Closing*	Indicate Closed/Lost
▼	Closed	0%	✓
▼	Lost	0%	✓
▼	To Qualify	30%	
▼	MQL	50%	
▼	SQL	70%	

**Notes:**  
 - The 'Probability of Closing' column shows the default probability of the stage, however, individual opportunities may have manually changed to a percentage amount which is different than this default.  
 - Stages flagged as Closed/Lost will not be considered in ROI calculations.

Default Revenue Attribution Method

The **attribution** method used as the default for all Opportunities is: **All to the first Campaign**  Edit

3. Click  **Edit** in the *Contact to Opportunity Association* area. An *Opportunities to Campaigns using Contacts* window opens.

## Contact to Opportunity Association

---

Association of Opportunities to Campaigns using Contacts

Eloqua will associate Opportunities to Campaigns based on the Contacts that have responded to a Campaign. From the options below, select which contacts are to be included in this association.

The primary Contact associated to the Opportunity in CRM.  
 All Contacts associated to the Opportunity in CRM.  
 All Contacts in Eloqua associated to the Account that is associated to the Opportunity in CRM.

**Note:** For the Account option, the Accounts **MUST** be imported into Eloqua as Companies with the CRM Account ID and the Contacts **MUST** be properly linked to the Companies within Eloqua.

Oracle Eloqua will associate opportunities to campaigns based on the contacts that have responded to a campaign. You can also select which contacts are to be included in this association from the following options (choose one):

- **The primary Contact associated to the Opportunity in CRM:** The opportunity is associated in Oracle Eloqua with a single contact designated as the primary contact for that opportunity in the CRM.
- **All Contacts associated to the Opportunity in CRM:** The opportunity is associated in Oracle Eloqua with all contacts associated with the opportunity in the CRM.
- **All Contacts in Eloqua associated to the Account that is associated to the Opportunity in CRM:** The opportunity is associated to all contacts that are, in turn, associated to an account that is associated to the opportunity in the CRM. Note that for this option to work, the accounts must be imported into Oracle Eloqua as companies with the CRM account ID and the contacts must be properly linked to the companies within Eloqua. (Note: Salesforce account ID is case sensitive.)

4. Click **Save and Close** to save your changes.

5. Click **Add New Opportunity Stage** in the *Opportunity Stage Details* area. The *New Opportunity Stage* window opens.

**Opportunity Settings**

Contact to Opportunity Association

The attribution method used to associate contacts to Opportunities is: *All contacts associated to the Opportunity* [Edit](#)

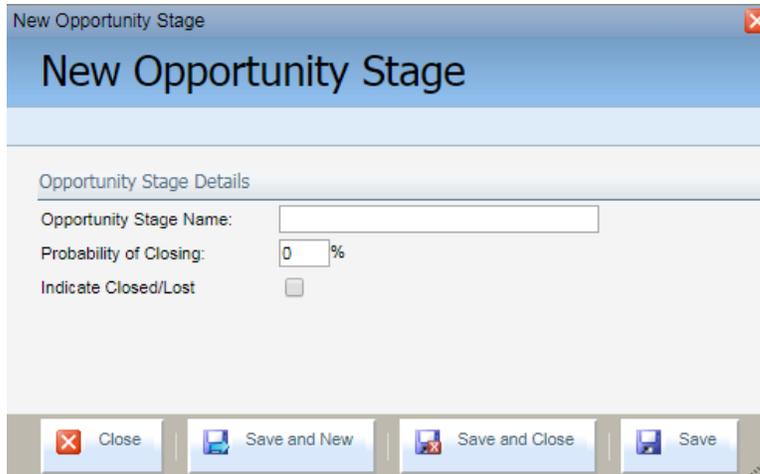
Opportunity Stage Details

All Opportunities are fully created and managed in the CRM system.

[Add New Opportunity Stage](#)

Rank	Stage Name	Probability of Closing*	Indicate Closed/Lost
1	1 - Proposal & Innovation	0%	
2	2 - Presentation & Trial	0%	
3	3 - Deal closure	0%	
4	4 - Deal closure follow-up	0%	

6. Complete the settings on the *New Opportunity Stage* page by:



- Typing a name into the *Opportunity Stage Name* field.
  - Providing a percentage for the *Probability of Closing* field.
  - Selecting the *Indicate Closed/Lost* check box if the opportunity has been lost or closed (these are not counted in ROI calculations).
7. If this is the only or final opportunity stage, then click **Save and Close**. Otherwise, click **Save and New** and create an additional stage, then repeat as required and click **Save and Close** after the last stage.
  8. Click **Save and Close** when you are finished adding stages.
  9. In the *Default Revenue Attribution Method* section, options are provided to let you set up which campaign responses to include in revenue attribution calculations and how to distribute attributed revenue. Click **Edit** and select the configuration settings:

## Opportunity Settings

### Contact to Opportunity Association

The attribution method used to associate contacts to Opportunities is: *All contacts associated to the Opportunity*  Edit

### Opportunity Stage Details

All Opportunities are fully created and managed in the CRM system.

 Add New Opportunity Stage

	Rank		Stage Name	Probability of Closing*	Indicate Closed/Lost
	1		1 - Proposal & Innovation	0%	
	2		2 - Presentation & Trial	0%	
	3		3 - Deal closure	0%	
	4		4 - Deal closure follow-up	0%	

#### Notes:

- The 'Probability of Closing' column shows the default probability of the stage, however, individual opportunities may have manually changed to a percentage amount which is different than this default.  
- Stages flagged as Closed/Lost will not be considered in ROI calculations.

### Default Revenue Attribution Method

The attribution method used as the default for all Opportunities is: *All to the first Campaign*  Edit

- Under **Which campaign responses do you want to include in the revenue attribution?**, select an option to indicate which campaign responses you want to include in the revenue attribution. You can choose to include:
  - All campaign responses from Lead Creation in Oracle Eloqua to *Opportunity Close* in the CRM. If this setting is selected, attribution will only include opportunities with a Closed Won status.
  - Campaign responses from Lead Creation in Oracle Eloqua to only *Opportunity Creation* in the CRM. If this setting is selected, attribution will only include Open and Closed Won status opportunities.
- Under **How do you want to distribute the revenue across the campaigns?**, select an option to indicate how you want to distribute the revenue across campaigns. You can attribute the revenue in the following ways:
  - Evenly across all campaigns
  - To the first or last campaign responded to
  - By specific percentages to the first, last, and other campaigns

10. Click **Save and Close**.

# "Run as other user" for campaigns

Every time a user activates a campaign, that campaign automatically inherits the contact security labels to which that user is assigned. If a contact in the campaign has a different security label than the user who activates it, that contact will be removed from the campaign upon activation. This ensures that label-based access control is enforced, and that no user can directly affect a contact with a different security label.

Administrators can use the *Run As Other User* option to activate a campaign as a different user, in order to avoid accidentally removing contacts from a campaign.

 **Example:** Jane has both the "Illinois" and "New York" security labels assigned to her. She has set up a campaign with various contacts that have at least one of these labels applied to them. At some point after Jane's campaign has been activated, someone on her team is tasked with making a few tweaks to the campaign. Her teammate has been assigned the "Illinois" security label, but not the "New York" label. Activating the campaign as themselves would automatically remove all contacts with the "New York" label.

### Activate Campaign

 **Campaign Activation Start Time**

Start Now

Start Later:   :  :

(UTC-05:00) Eastern Time (US & Cana

---

 **Campaign Activation End Time**



Campaign duration set for 3 months  
Campaign Reporting will associate with this campaign from 1/4/2016 to 10/16/2017  
(12 months after the completion date).

---

 **Campaign Activation User**

Run as Me

  Run as Other:

(This selection has defaulted to the previous user)

Instead, John makes a request to his administrator to reactivate the campaign. The administrator reviews the campaign, activates it, selects the *Run as Other* option, and runs the campaign **as** Jane.

**To run a campaign as a different user:**

1. Navigate to **Orchestration** , then click **Campaigns**.
2. Open an existing campaign.
3. Click **Deactivate** if the campaign is active.
4. Edit the program as needed, then click **Save**.
5. Click **Activate**.
6. Select the **Run as Other** option, then select a user from the adjacent drop-down list. The default selection will be the previous user to create, edit, or activate this campaign.

**Important:** If you don't see this prompt, your security group does not have the required action permissions.

7. Click **Activate**.

The campaign will run as the selected user.

**Tip:** Use the [campaign audit](#) to see the user(s) who previously activated a campaign.

# Campaign approvals

Campaign approvals facilitate the verification of content (emails, landing pages, and so on) prior to activating a campaign.

**Note:** This feature is included in the Standard and Enterprise trims. For more information, contact your account representative or log in to [My Oracle Support](https://support.oracle.com) (<https://support.oracle.com>) and create a service request.

It is important to validate the content of the emails, landing pages and other content that is included in a campaign. Campaign approvals can help you with this type of content verification before a campaign is activated. If you do not have this add-on, campaigns can be activated by the owner (creator) of the campaign or anyone with the necessary permissions. See [Activating multi-step campaigns](#) for more information.

With campaign approvals, Oracle Eloqua administrators have the ability to customize the stages in the approval workflow. They can also select which users are authorized to approve the content that is being reviewed. After all campaign stages (steps) have been approved, the campaign can be activated.

At a high level, the campaign approval process occurs as follows:

1. Create a standard workflow for approvals that can be used for all future campaigns. You need to specify which users are authorized as approvers at each stage. Learn more about [configuring the campaign approval workflow](#).
2. To manage the approvals feature you must be a member of a security group that has access to approvals. Learn more about [enabling campaign approvals for groups](#).

3. You can configure the approvals feature to allow certain groups or users to activate campaigns without going through the approvals process. Learn more about [granting campaign activation permission](#).
4. When a campaign is ready to be approved, you can [send a campaign approval request](#) and [check the status of the approval](#).
5. Reviewers have the option to either [approve or reject the campaign](#).
6. After the campaign is approved, it can be activated. Learn more about [activating a campaign](#).

**Note:** The approvals workflow is not available for simple email and A/B test campaigns.

## Configuring the campaign approvals workflow

The campaign approvals workflow is a set of stages that a campaign must pass through prior to activation. It is a *global* workflow for campaigns in your Oracle Eloqua instance. You can not create separate workflows for individual campaigns.

**Note:** The approvals workflow is not available for simple email and A/B test campaigns.

**To configure the campaign approvals workflow:**

1. Click **Settings** .
2. Click **Approvals** in the *Users and Security* area.

The *Approvals* dialog box opens.



3. Create the necessary review stages for your approval process:

- a. Click **Add** . The *Add Review* screen opens.
- b. Type the name of the stage into the *Name* field.
- c. **(Optional)** Type a brief, meaningful description of the stage into the *Description* field.

 **Example:** The first step in your approvals process might be a review of the content in your email and landing page. The description only appears when editing the stage. It is not shown in the list of steps when viewing the approval process.

- d. Type the name of a person that you want to set as an approver for this stage into the *Reviewers* field. When the correct name appears, click the full name to add them as an approver. You can only select individual users from your Oracle Eloqua instance.

 **Important:** When an approver is entered correctly, their name is displayed in the field with an **X** next to it. Click the **X** next to the name to remove them from the list of approvers.

Repeat as needed until you have the desired number of approvers for this stage.

- e. Click **Save** to save the approval stage. The window closes and the *Campaign Approvals Workflow* dialog box appears.

Repeat these substeps until you have the desired number of review stages. While there is no enforced limit of steps, it is recommended to keep the number of stages to a reasonable level.

4. Make any appropriate adjustments to your approval stages:

- **To reorder stages in your workflow:** Click and hold a stage, then drag-and-drop it to the desired position.
- **To edit a stage :** Click **Edit**  to the right of the stage. The *Edit Review* dialog box opens, where you can rename, change the description, or modify the names of the reviewers for this stage.
- **To delete a stage:** Click the **X** icon to the right of the stage. A confirmation dialog box opens. Click **OK** to confirm the deletion.

Your approvals workflow is set for your Oracle Eloqua instance.

**Note:** You cannot add, remove, or modify approval stages while any campaign remains in **"Awaiting Approval"** stage. However, you may add, remove (retaining at least one reviewer), or update approvers for existing stages. To change the stages themselves, all pending approvals must first be completed in your Oracle Eloqua instance.

## Enabling campaign approvals for groups

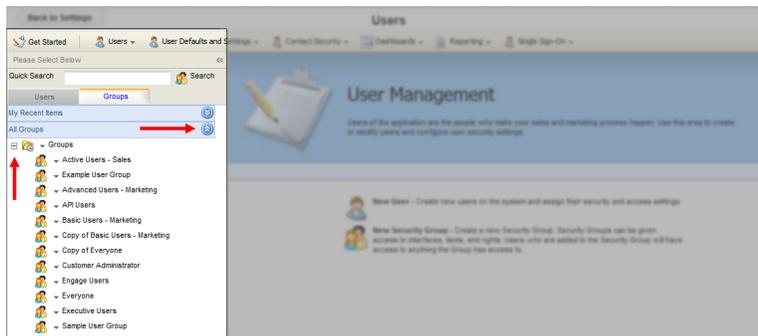
Before a user can approve a campaign they must be a member of a group that has the appropriate approval permissions.

**To enable campaign approvals for a group:**

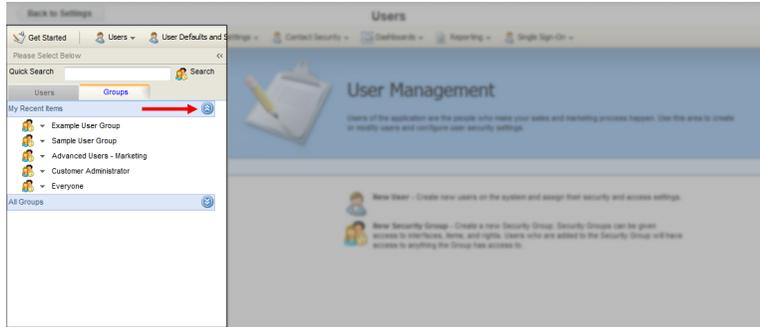
1. Click **Settings** .
2. Click **Users** in the *Users and Security* area.
3. Click the *Groups* tab on the left panel.



4. Locate the security group that requires approvals access. You have three options to achieve this:
  - a. Expand the *All Groups* drop-down, then click the + symbol next to the *Groups* folder to navigate into that folder.



- b. Expand the *My Recent Items* drop-down to access a list of recently created or modified security groups available to you.

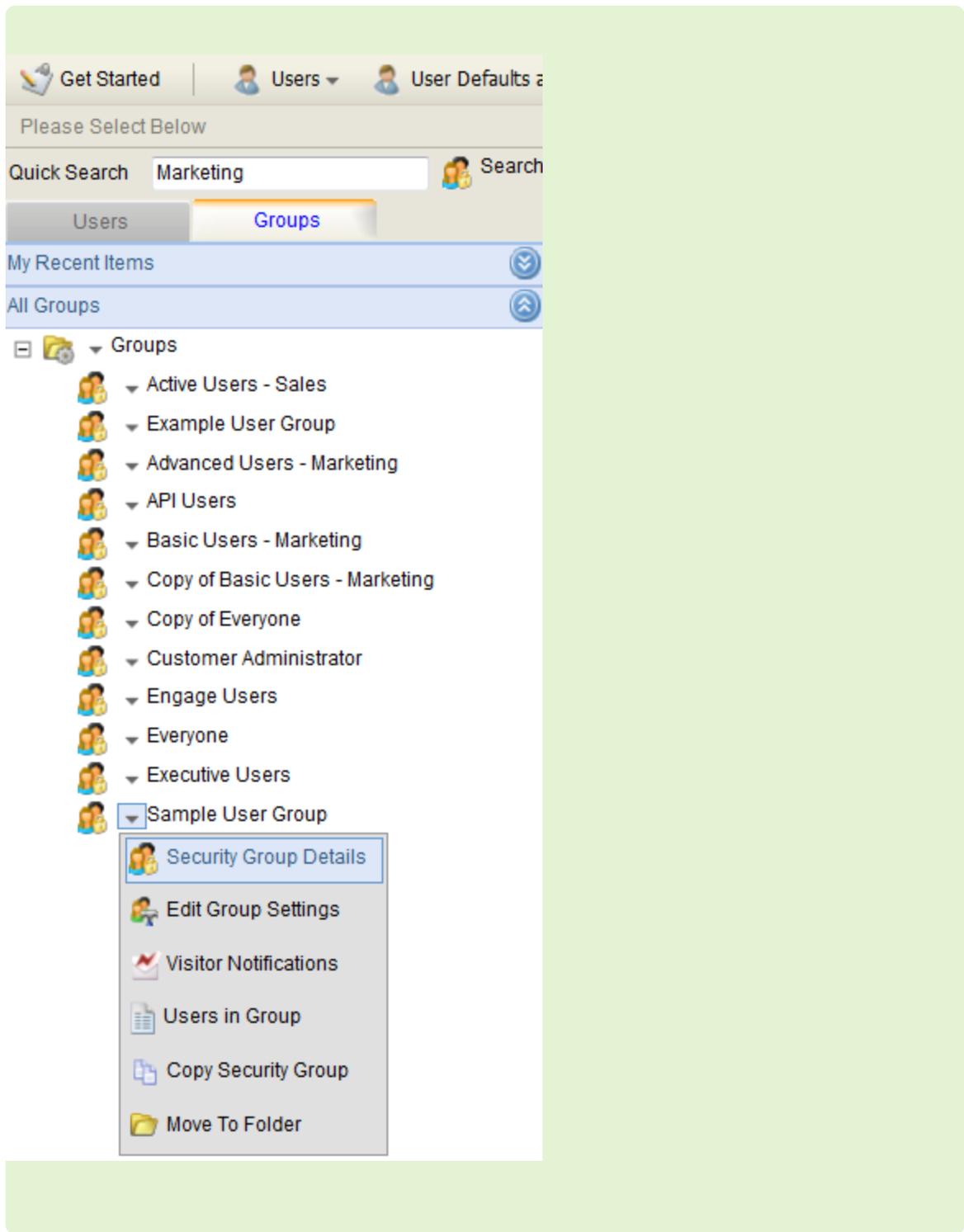


- c. Type the first few letters of the group into the *Quick Search* field, then press **Enter**.



5. Click the group name to open the security group profile on the right panel.

**Note:** Alternatively, you can click the drop-down arrow next to a user profile, then click **Security Group Details**.



6. Click **Interface Access**.

## Security Group Overview

**Name**  
Prospect Profiler User

**Acronym**  
EPPU

[View Users in Group](#)

[Licensing](#)  
Select which products users will have access to.

[Interface Access](#)  
Select which screens or feature areas users can navigate to.

[Action Permissions](#)  
Select what users can do within specific interfaces or feature areas.

[Asset Creation](#)  
Select which asset types users can create.

[Default Asset Permissions](#)  
Select the default permissions applied when a user creates an asset.

[Business Unit Membership](#)  
Select which Business Units users will be members of.

7. Click **Edit** to edit the settings for your group.

## Sample User

[Security Group Overview](#) / [Interface Access](#)

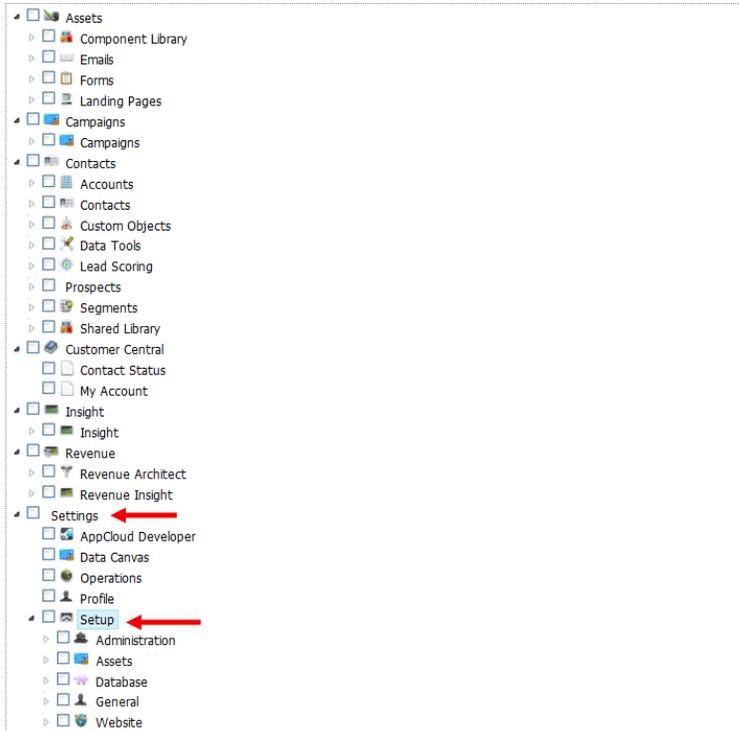
Select which screens or feature areas users can navigate to. If a user does not have access to a particular interface, it will be completely hidden. For example, unchecking "Email" will hide the entire Email area from users in this Security Group. The hierarchy below follows the hierarchy of how you navigate Eloqua to allow for easy configuration.

[Edit](#)

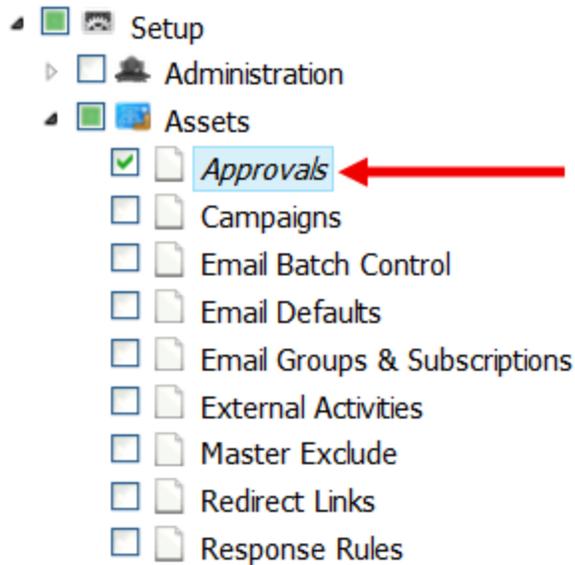
No Interfaces have been selected

[Edit](#)

8. Scroll down to **Settings**, then click **Setup** to expand it.



9. Click **Assets** to expand it, then select the **Approvals** check box.



10. Click **Save**.

The security group has been granted approval permissions.

# Setting campaign activation permissions for new campaigns

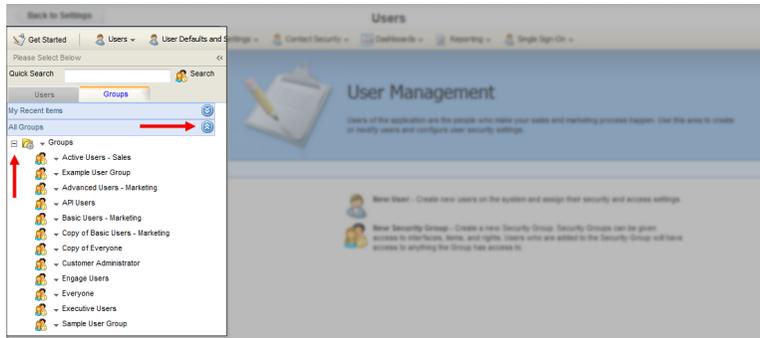
Campaigns can only be activated with the appropriate permissions. If the **campaign approvals** feature is enabled, you must **request approval** before you can activate the campaign.

To grant campaign activation permissions to a user or user group:

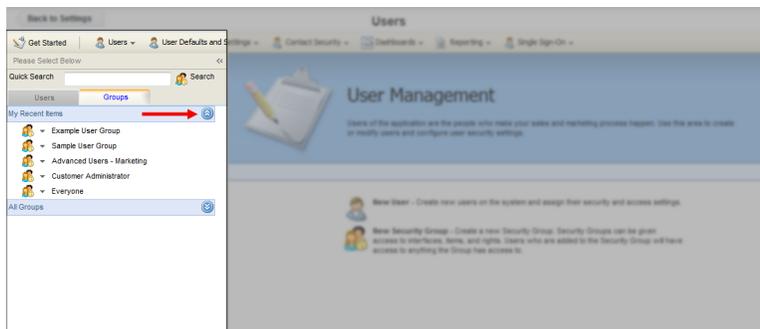
1. Click **Settings** .
2. Click **Users** in the *Users and Security* area.
3. Click the *Groups* tab on the left panel.



4. Locate the user group you want to modify. You have three options to achieve this:
  - a. Expand the *All Users* drop-down, then click the + symbol next to a folder in order to navigate into that folder.



- b. Expand the *My Recent Items* drop-down to access a list of recently created or accessed user profiles available to you.

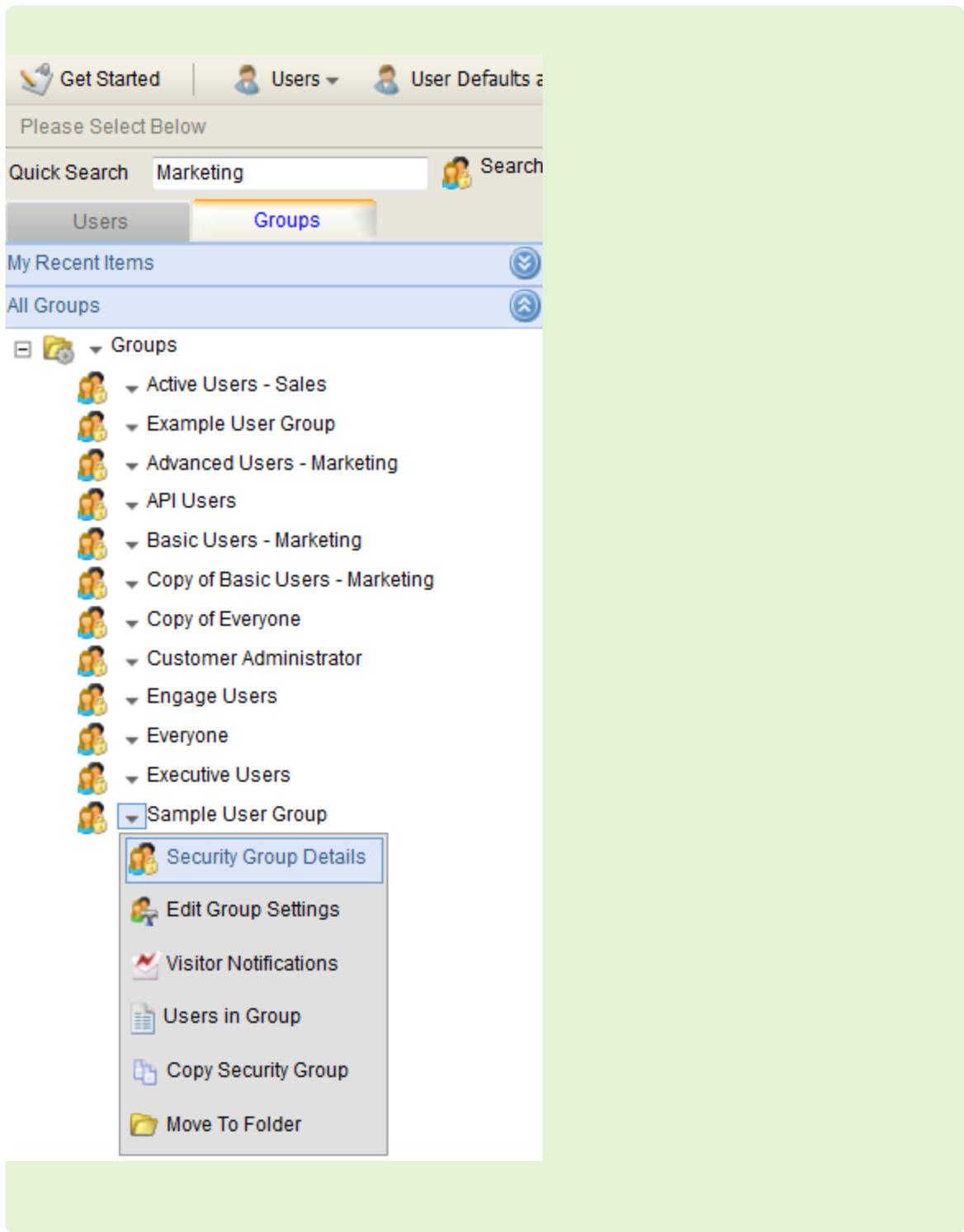


- c. Type the first few letters of a user profile into the *Quick Search* field, then press **Enter**.



5. Click the group name to open the security group profile on the right panel.

**Note:** Alternatively, you can click the drop-down arrow next to a group name, then click **Security Group Details**.



6. Click **Default Asset Permissions**.

## Security Group Overview

**Name**  
Sample User

**Acronym**  
EPPU

[View Users in Group](#)

[Licensing](#)  
*Select which products users will have access to.*

[Interface Access](#)  
*Select which screens or feature areas users can navigate to.*

[Action Permissions](#)  
*Select what users can do within specific interfaces or feature areas.*

[Asset Creation](#)  
*Select which asset types users can create.*

[Default Asset Permissions](#)  
*Select the default permissions applied when a user creates an asset.*

[Business Unit Membership](#)  
*Select which Business Units users will be members of.*

7. Click **Edit**.

## Sample User

[Security Group Overview](#) / [Default Asset Permissions](#)

*Select the default permissions applied when a user creates an asset. Default asset permissions can only be applied to assets that can be created by users in this Security Group. Click [here](#) to configure the assets that can be created by users in this Security Group.*

[Edit](#)

8. On the *Campaigns* tab, select the *Activate* check box for the security group or individual user who needs be able to activate campaigns.

Select the default permissions applied when a user creates an asset. Default asset permissions can only be applied to assets that can be created by users in this Security Group. Click [here](#) to configure the assets that can be created by users in this Security Group.

Isaac.Steele

	View	Edit	Delete	Security	Activate	
<b>Campaigns</b>	<input checked="" type="checkbox"/>					
Company Filters	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Delete
Contact Filters	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Delete
Contact Groups	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Delete
Content Sections	<input checked="" type="checkbox"/>	Delete				
Notes Card						

- If *Activate* is not selected, the user or group does not have the activation permission. If the [campaign approvals feature](#) is in use, the user can still activate a campaign, but must first go through the [approvals process](#).
- If *Activate* is selected, the user or group can activate the campaign regardless of whether or not the campaign approvals feature is in use.
- If the user or security group is not listed, type the name of the user or security group into the search field, then click **Add**.

Select the default permissions applied when a user creates an asset. Default assets be created by users in this Security Group. Click [here](#) to configure the assets that

Isaac.Steele  

- Click **Delete** in the row of a user or security group to remove them from the list.

	View	Edit	Delete	Security	Activate	
Asset Creator	<input checked="" type="checkbox"/>					
Active Users - Sales	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Delete
Advanced Users - Marketing	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Delete
Basic Users - Marketing	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Delete
Customer Administrator	<input checked="" type="checkbox"/>	Delete				
Isaac.Steele	<input checked="" type="checkbox"/>	Delete				

9. Click **Save** when you are finished.

Campaign activation permissions have been granted to the specified groups or individual users.

## Requesting campaign approval

Request reviews for your campaigns once your administrator has [configured the campaign approvals workflow](#)

**To request campaign approval:**

1. Navigate to **Orchestration** , then click **Campaigns**.
2. Open an existing campaign, or [create a new one](#).
3. Click **Actions** , then click **Approvals**.

4. Click the field below each stage to open a drop-down list of names.

**Note:** Only reviewers who were added when you [configured the stage](#) will appear on this list. In the example below, the stages Content Review and Branding Compliance have been created and configured.



Add reviewers to this Approval process

Content Review

Enter reviewer name(s)

Branding Compliance

Enter reviewer name(s)

5. Specify the appropriate reviewer for each stage by typing and clicking the appropriate user name. After the reviewer is added successfully, their name appears in the field with an X next to it.

**Note:** If you need to remove the name from the field, click the X next to the name.

6. Click **Save** after adding a reviewers to each stage.
7. Click **Request Approval** when you are ready to send out the approvals request.

An email is sent to the approvers requesting that they review the content assigned to them. The sender of the email is shown as **Eloqua Notifier**.

The following information is included in the approval request email:

- The name of the person requesting approval.
- The stage in the approval process for which approval is being requested.
- The name of the campaign.
- The name of the segment for the first step in the approval process.
- If it is a segment that is being reviewed for approval, the total number of contacts included in that segment.

**ORACLE** Eloqua

---

Dear **APPROVER**,  
**REQUESTER** has requested your approval:

## Campaign

<b>Campaign</b>	Object 1024
<b>Approval Stage</b>	APPROVAL_STAGE
<b>Segment</b>	SEGMENT_NAME
<b>Total Contacts</b>	1234

[View Campaign](#)

---

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When the approval is in progress, the status button of your campaign changes to the name of the current step in the workflow.

 **Example:** In the following image, the campaign is at the *Content Review* stage:



While the campaign approval is in progress, the reviewers will either approve or reject the campaign stages.

- If all stages are approved: The *Approvals* button in the top-right corner of the canvas changes to *Activate*, and the campaign can now be [activated](#).
- If a stage is rejected: The approvals process stops and the campaign reverts back to *Draft* status. The reason for rejection is captured on the history tab along with the reviewer's comments:

Stage	Reviewer	Date	Comment	Status
Content Review	Andrew Stivelman	Tuesday, March 04, 2014 11:19 AM	Content is acceptable and meets all requirements. Approving.	Approved
Branding Compliance	Richard Marzura	Tuesday, March 04, 2014 11:43 AM	Does not follow approved branding. Please update.	Rejected

 **Note:** While a campaign approval is in progress, the campaign can still be edited. However, after the campaign is edited, the **Approve** and **Reject** buttons next to a stage are no longer visible, and the approvals process must be re-initiated from the beginning.

While a campaign approval is in progress, you can [check the approval status](#) at any time.

## Checking the approval status of campaigns

After you [request campaign approval](#), you can check the status and view the stages and reviewer comments. At any time, you (or any Oracle Eloqua user who is listed as an approver in your instance) can see an overview of all approval steps awaiting action.

**Note:** You cannot make any changes to the approval process (steps, approvers, and so on) while the campaign (or any other campaign) is active; you must first deactivate the campaign in order to make changes.

### To check the approval status of a campaign:

1. Click the **Approvals** tab in the main *My Eloqua* dashboard.

Current campaigns pending approval and their status are displayed under *Approvals*, while approval history and any responses from reviewers are displayed under *History*.

## Approving or rejecting campaign stages

When your approval is needed for a campaign, you receive an email requesting your participation. You can review the campaign and preview the assets on the campaign canvas, you can then decide to either approve or reject the stage. If you reject a stage, the campaign returns to the draft status. If you approve the stage, it continues forward in the approvals workflow.

**Note:** In order to prevent all users from being able to approve or reject a stage in the approvals workflow, you can approve or reject a stage (step) in the process if you have customer administrator rights and are the assigned user for the approval.

### To approve or reject a campaign stage:

1. Click **View Campaign** in the approval request email to open the content for approval.

**Note:** If you are not currently logged in to Oracle Eloqua when you click **View Campaign**, you will be directed to the Oracle Eloqua login screen. Once logged in you will need to manually open the campaign: navigate to **Campaigns > Open an Existing Campaign** then search for the campaign and click **Choose**.

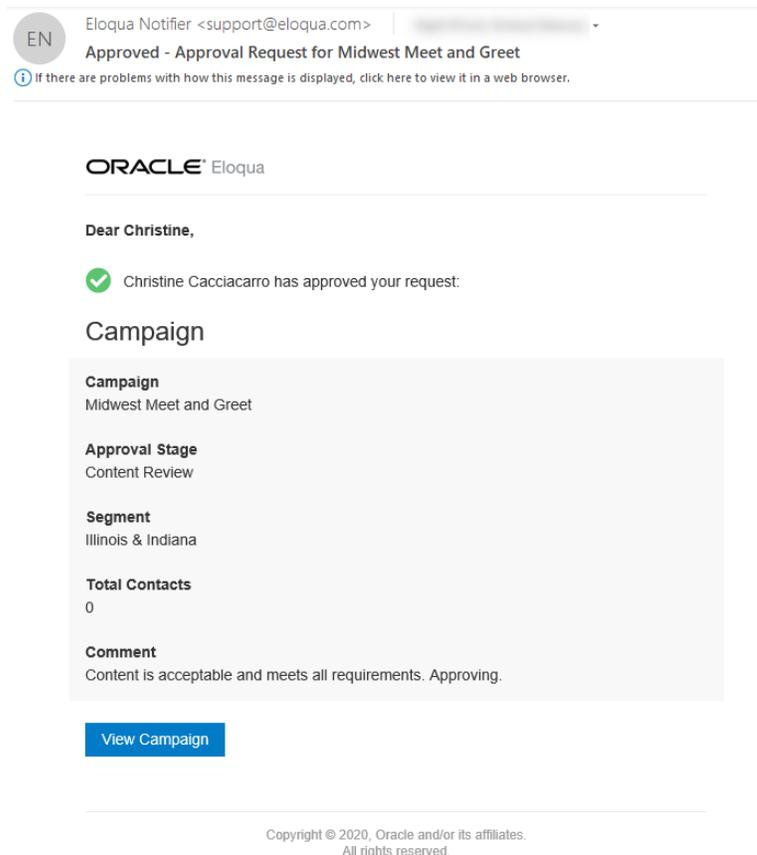
2. Right-click an asset on the campaign canvas, then click **Preview**. A preview window opens where you can search for contacts.
3. Find a contact, then click the **Preview** button at the bottom of the window. A preview is generated allowing you to view the asset as it will appear to that contact.
4. **(Optional)** Click the tabs on the top of the screen to preview what the user will see if they are using a desktop computer, a tablet, or a mobile device.
5. Click **Add Contact** to preview the asset for another contact, or click **Cancel** to return to the campaign canvas.
6. Click **Actions > Approvals** when you are finished reviewing the campaign.

7. Click either **Reject** or **Approve** to provide your decision.

A confirmation dialog box opens. Type a reason for your decision, then click **Confirm**.

The results of your decision are as follows:

- **Approve:** An email is sent to the person(s) who requested your approval. The person is informed of your decision and provided with any comments that you made.



The *Status* tab is updated to show that approval has been granted via a green check mark. The approvals workflow continues and the reviewer(s) responsible for the next step is notified that their approval is required.

- **Reject:** An email is sent to the person(s) who requested your approval. The person is informed of your decision and provided with any comments that you made.



Eloqua Notifier <support@eloqua.com>

Rejected - Approval Request for Midwest Meet and Greet

If there are problems with how this message is displayed, click here to view it in a web browser.

**ORACLE** Eloqua

Dear Christine,

Christine Cacciaccaro has rejected your request:

## Campaign

### Campaign

Midwest Meet and Greet

### Approval Stage

Content Review

### Segment

Illinois & Indiana

### Total Contacts

0

### Comment

The location specified in the initial email is inaccurate. Please review.

[View Campaign](#)

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The approvals process stops and the campaign reverts to *Draft* status. The reviewer's reason for rejecting the campaign at this stage is displayed on the history tab.

In steps that have more than one reviewer, the step is considered either approved or rejected after the first person submits his or her approval or rejection. In other words, all approvers in a step are **not** required to give their responses in order for the process to proceed to the next step.

# Campaign activation security

Campaigns can be assigned a security permission called *Activation*, which allows customer administrators to determine if a user can activate, view, or edit a campaign. For example, you may want to grant a low level user permissions to create and set up a campaign, but not have the authority to activate it.

Asset Permissions					
Specify users or security groups and what level of access they will have to this asset					
User/Group	View	Edit	Delete	Set Security	Activate
Active Users - Sales	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Advanced Users - Marketing	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Basic Users - Marketing	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Isaac Steele	<input checked="" type="checkbox"/>				
Frank Ocean	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer Administrator	<input checked="" type="checkbox"/>				

Cancel Save

# Mobile campaign manager

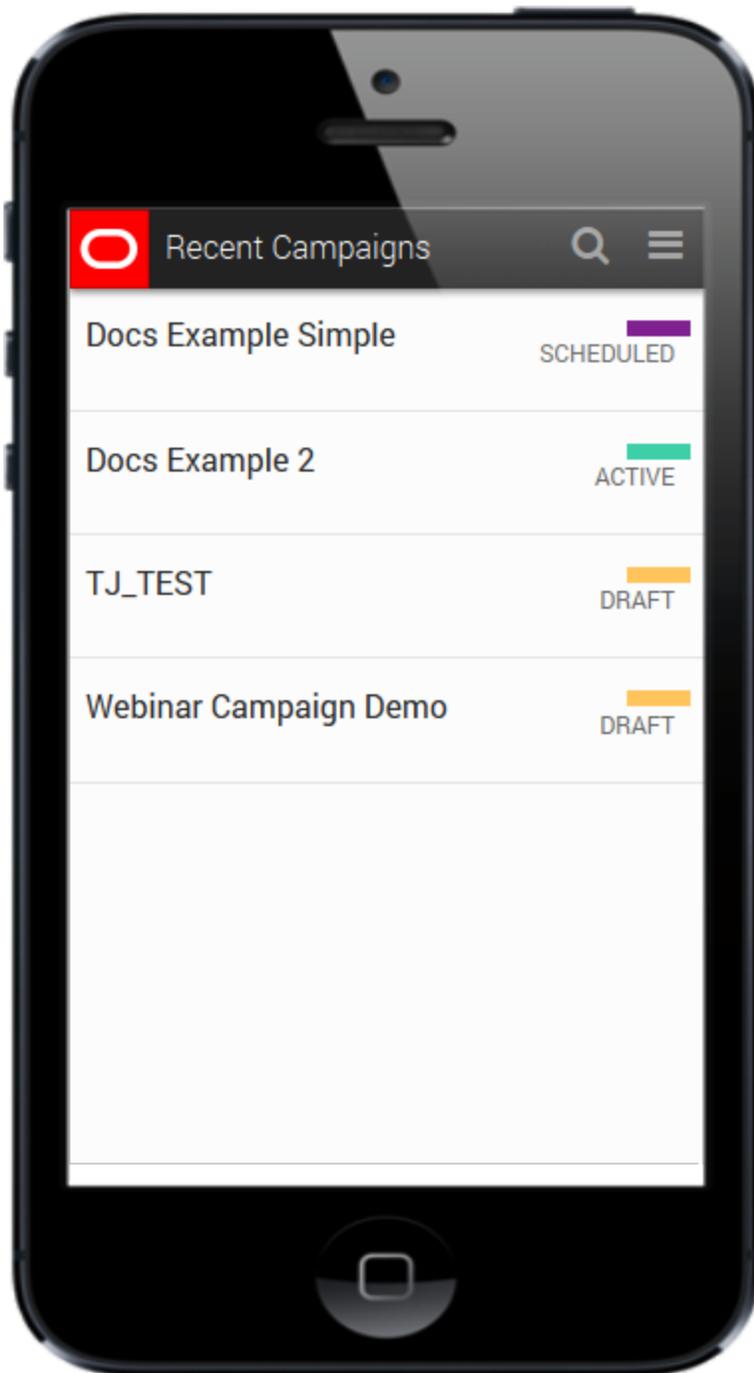
Eloqua's *Mobile Campaign Manager* is a mobile site designed for iOS and Android devices that allows marketers to activate, deactivate, and monitor their campaigns directly from their mobile devices. The mobile campaign manager provides quick insight into the status of your campaigns, and on-the-go flexibility. Marketers can also schedule and unschedule simple email campaigns using the mobile campaign manager.

To use the mobile campaign manager, it must be [installed by a customer administrator](#).

Once installed, mobile campaign manager can be accessed by navigating to the following URL:

- <https://login.eloqua.com/apps/salesTools/cm>

## Walkthrough

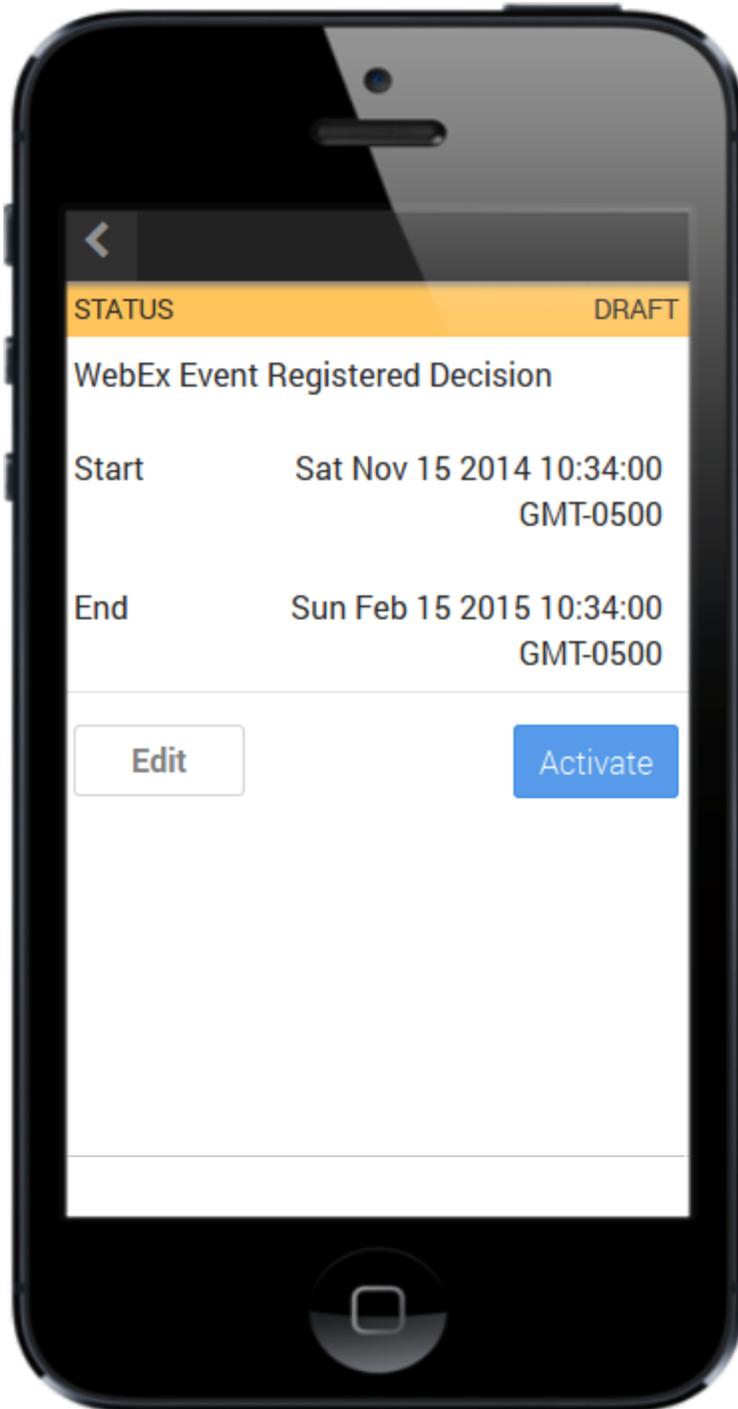


The central screen of the mobile campaign manager lists your recently-viewed campaigns, and visually indicates their status, either draft, scheduled, or active. The

navigation bar at the top of the screen includes the Oracle  logo, which you can use to return to the *Recently Viewed* screen at any time, a magnifying glass icon  that opens the search bar, and a menu icon  from which you can log out of the application.

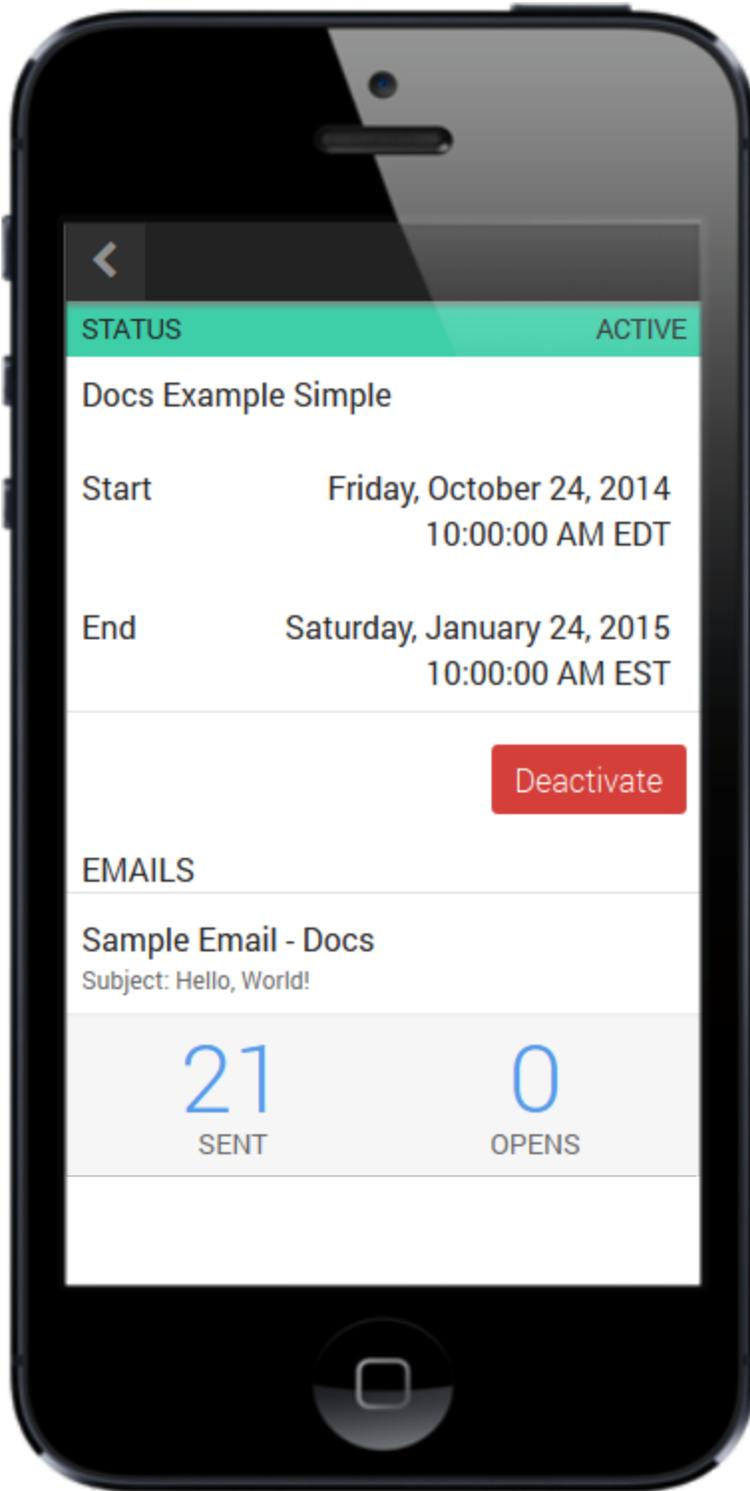
Tapping on a campaign either in the *Recent Campaigns* screen or from the search results shows the campaign info screen.

Campaigns in a draft state have the option to activate the campaign, and in the case of simple email campaigns, to schedule it.



Scheduled campaigns include a button to deactivate the campaign and prevent it from proceeding.

Active campaigns show the campaign information and also include a deactivation button so you can deactivate the campaign. For simple email campaigns, there are also campaign statistics, like the number of emails sent, opened, clickthroughs and conversions.



# Installing mobile campaign manager

**Note:** You must add the app to your catalog and install it before you can start using the service.

**Important:** Because deleting or deactivating the installer user account will impact installed apps, we recommend installing apps using a user account that is not tied to a specific person. The user account must have customer administrator rights.

## To install mobile campaign manager:

1. Follow the URL provided:

<https://cloudmarketplace.oracle.com/marketplace/app/AppMobileCampaignManager>

2. Click **Get App**.
3. Log in with your Eloqua credentials, if required.
4. Click **Accept and Install** to add the app to your *Apps* list.
5. Click **Save**. (This app does not require any configuration.)
6. Click **Accept** or switch users.

The app is now installed and can be viewed in your *Apps* list (**Settings**  > **Apps**, under the *Platform Extensions* section). Select an app to view a description, reinstall, or uninstall it. You can also check its status and dependencies.

**Warning:** Selecting the **Reinstall** option  for an app will force you to go through the entire installation process again. The app will be unavailable for all users during the reinstall.

Once installed, mobile campaign manager can be accessed by navigating to the following URL:

- <https://login.eloqua.com/apps/salesTools/cm>

## Scheduling a campaign with the mobile campaign manager

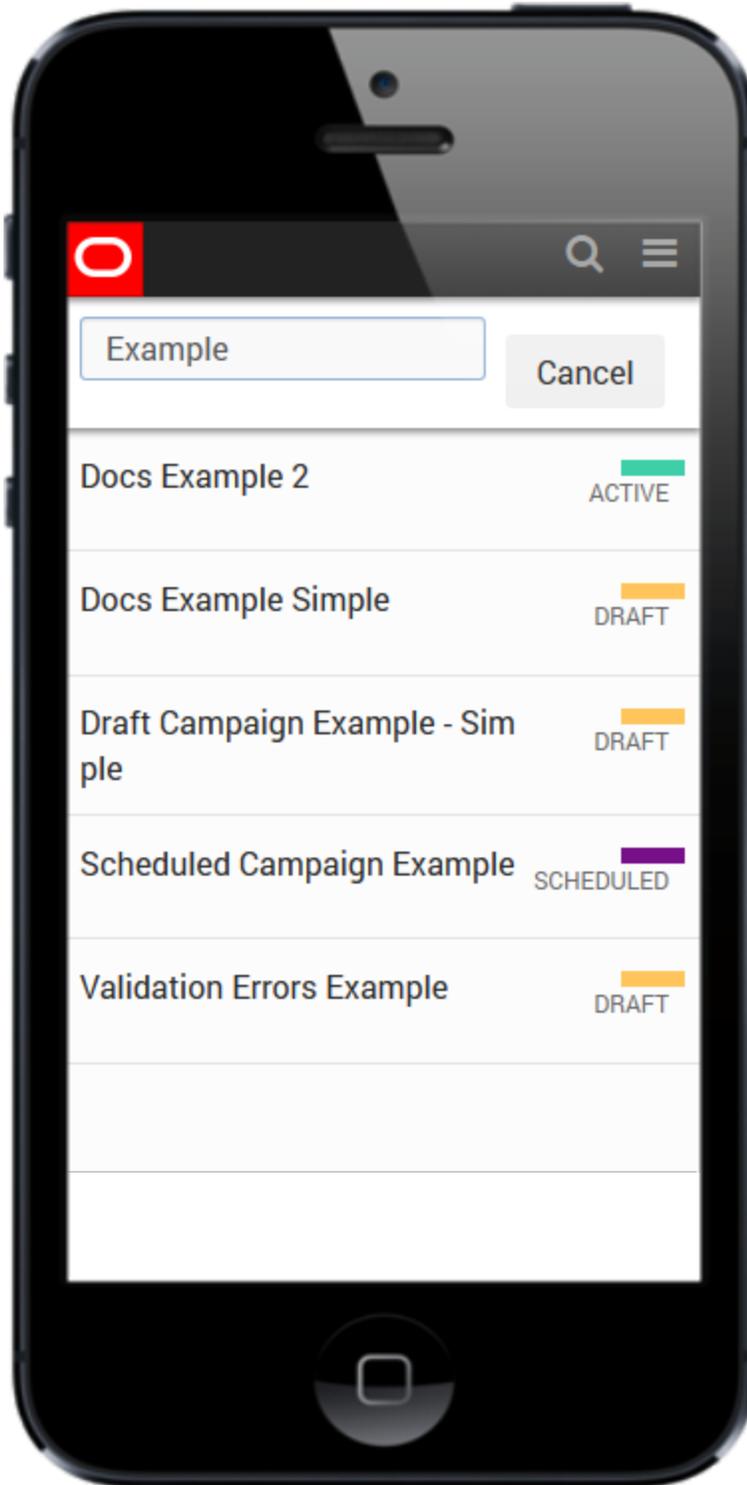
With the mobile campaign manager, you can schedule a right from your mobile device.

You must have already created the campaign within Eloqua before you can edit and activate it with the Mobile Campaign Manager.

### To schedule a campaign in the mobile campaign manager:

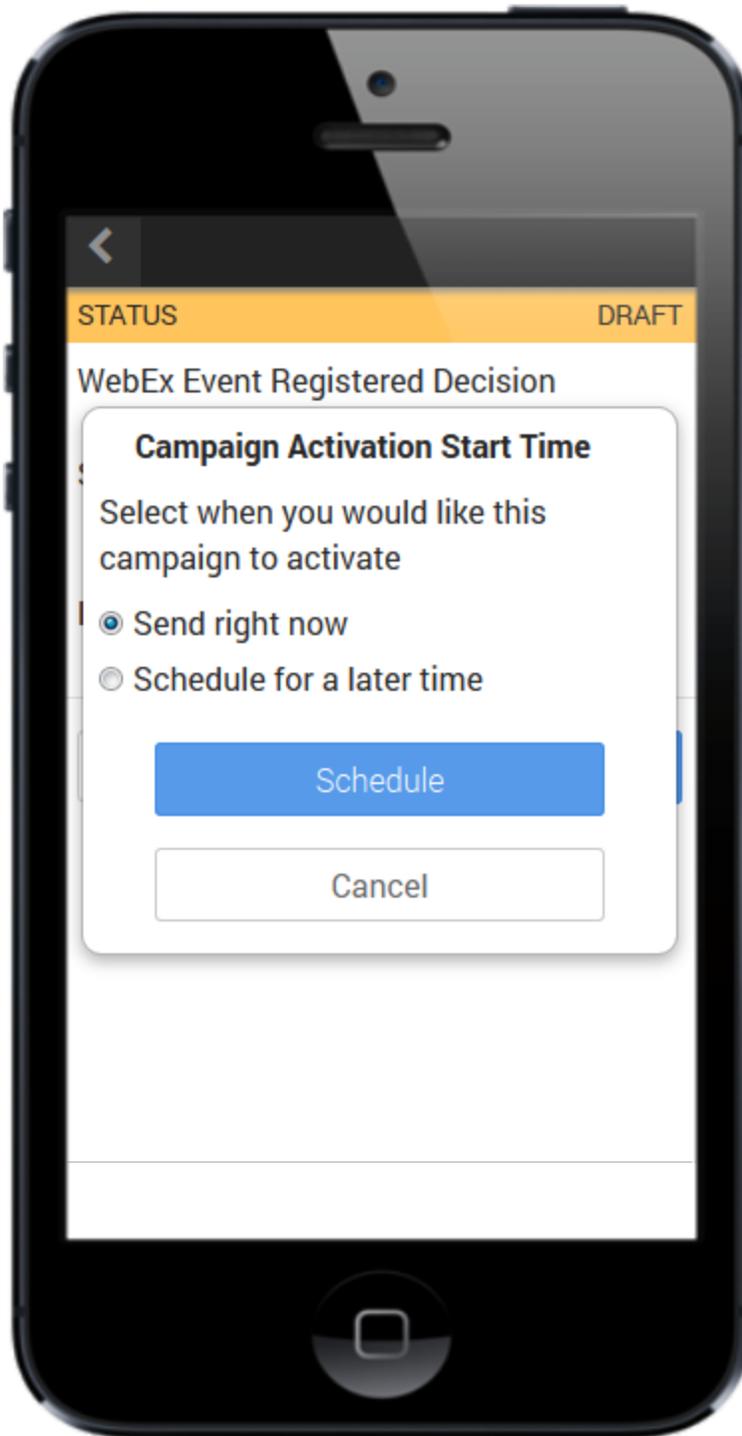
1. Open the mobile campaign manager on your mobile device. To access the mobile campaign manager, navigate to <https://login.eloqua.com/apps/salesTools/cm/>.
2. Open the campaign that you wish to edit:
  - Select a recently-viewed campaign from the list, or
  - Search for a specific campaign by tapping the magnifying glass icon and searching by the campaign

name.



The campaign status screen will open, showing the campaign status, the start and end dates, and any related assets.

3. Select **Edit**. You will be prompted to select when you would like the email campaign to launch.



4. Choose to either **Send right now**, or **Schedule for a later time**. This will overwrite the scheduling information you provided when you created the campaign in Eloqua. If you choose to schedule at a later time, you will need to provide the date and time that the campaign should go live.
5. Select **Activate**.

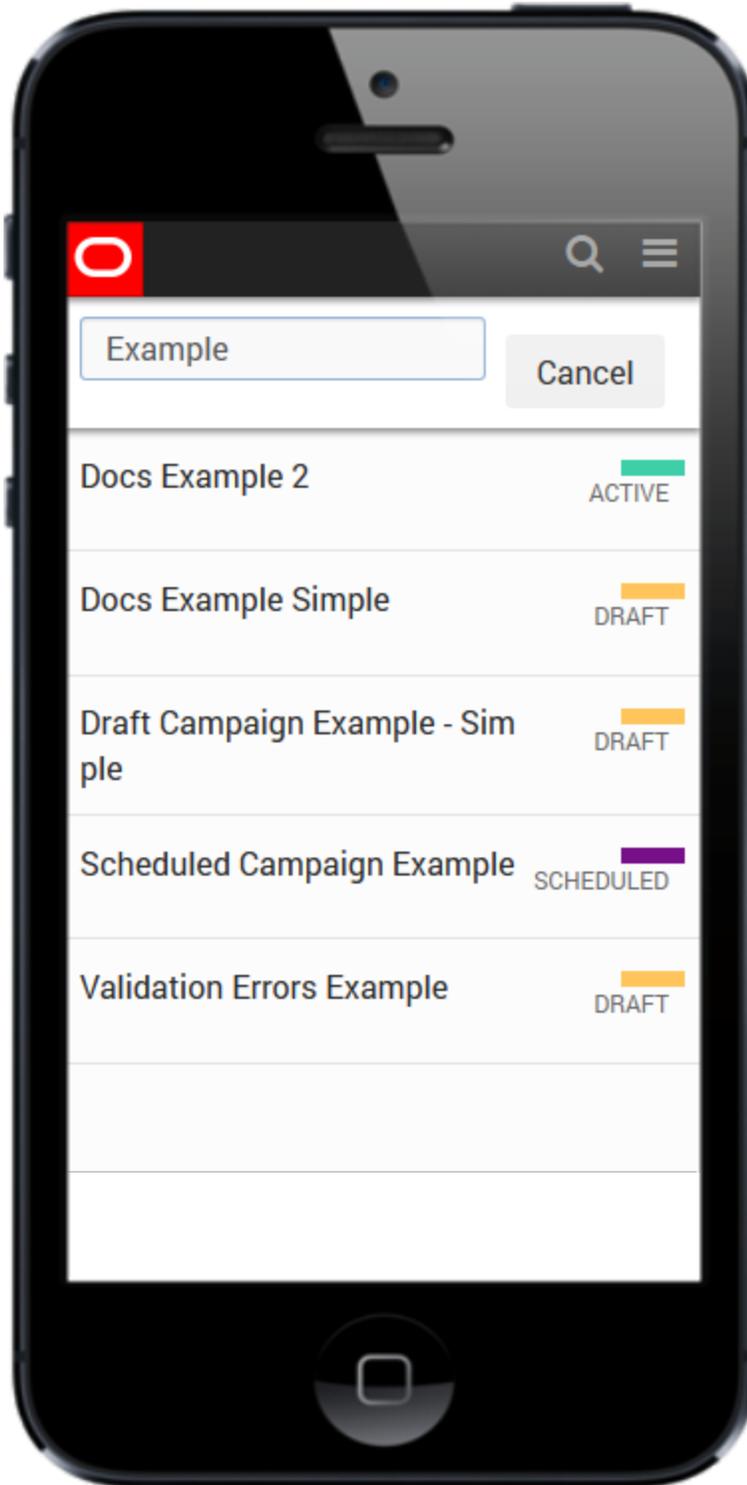
The campaign status screen refreshes to show that the campaign is now scheduled. When the campaign is activated, the campaign status screen indicates that the campaign is active, and shows some simple campaign reporting metrics.

 **Note:** Reporting metrics are only available for simple email campaigns.

### To unschedule a campaign in the mobile campaign manager:

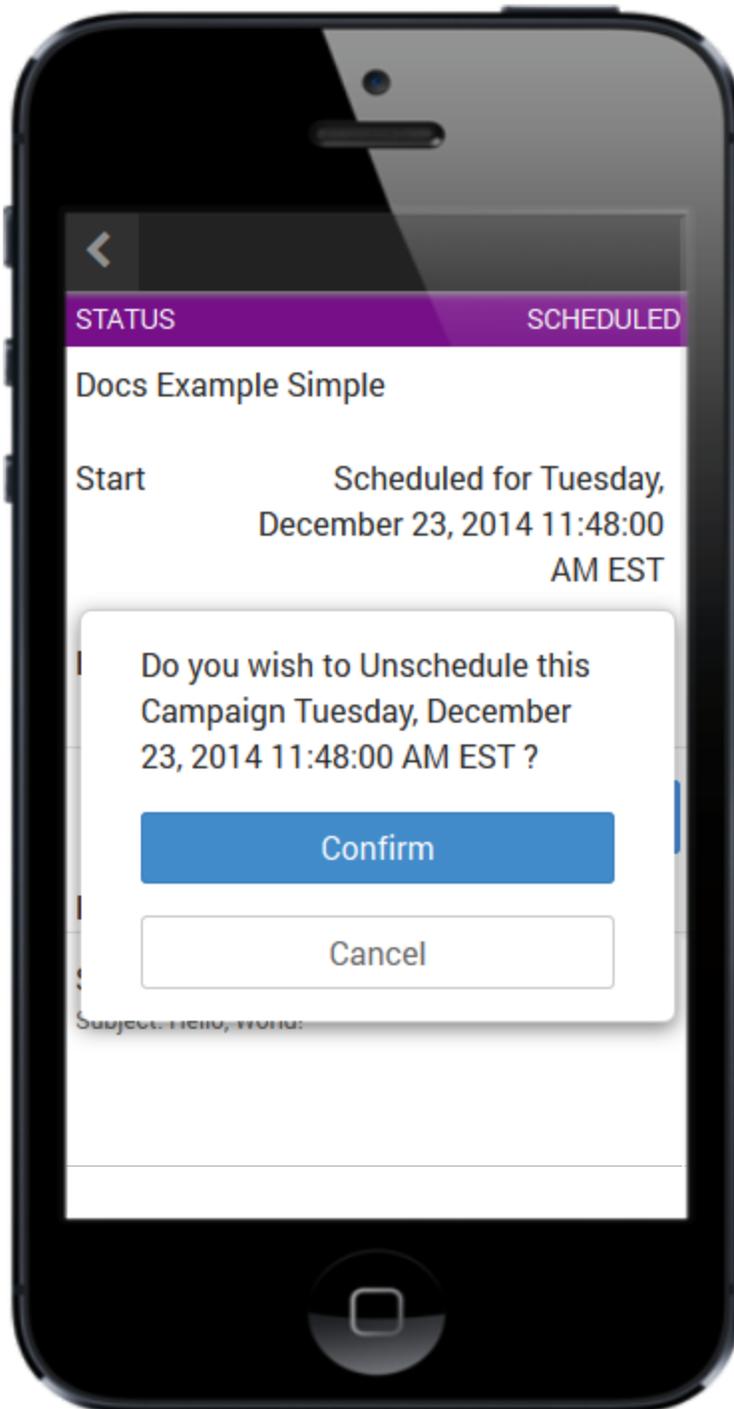
1. Open the mobile campaign manager on your mobile device. To access the mobile campaign manager, navigate to <https://login.eloqua.com/apps/salesTools/cm/>.
2. Open the campaign that you wish to edit:
  - Select a recently-viewed campaign from the list, or
  - Search for a specific campaign by tapping the magnifying glass icon and searching by the campaign

name.



The campaign status screen will open, showing the campaign status, the start and end dates, and any related assets.

3. Select **Edit**. You will be prompted to confirm that you wish to unschedule the campaign.



4. Select **Confirm**.

The campaign status screen refreshes to show that the campaign is in a draft state. You can click **Activate** to reschedule it.

# External assets and activities

External assets are non-Eloqua activities performed by your contacts or prospects.

These assets can be imported for use in Oracle Eloqua campaign reporting. In addition, data associated with these activities can be passed to your CRM systems.

External activities can be displayed in [Eloqua Profiler](#). This feature provides a 360-degree view of a contact's activities across all Oracle Eloqua functions, including email sends, web visits, and external activities.

External activities can also be used as part of your CRM integration allowing you to track responses to all campaign activities and export them to your CRM.

Oracle Marketing AppCloud apps can also generate external activities. For example, an app that is added to the campaign canvas might use external assets and activities for use in campaign reporting.

You can include external activities in your campaign reporting or use the [Campaign External Activity](#) or the [Account Activity](#) subject areas to report on external activity performance.

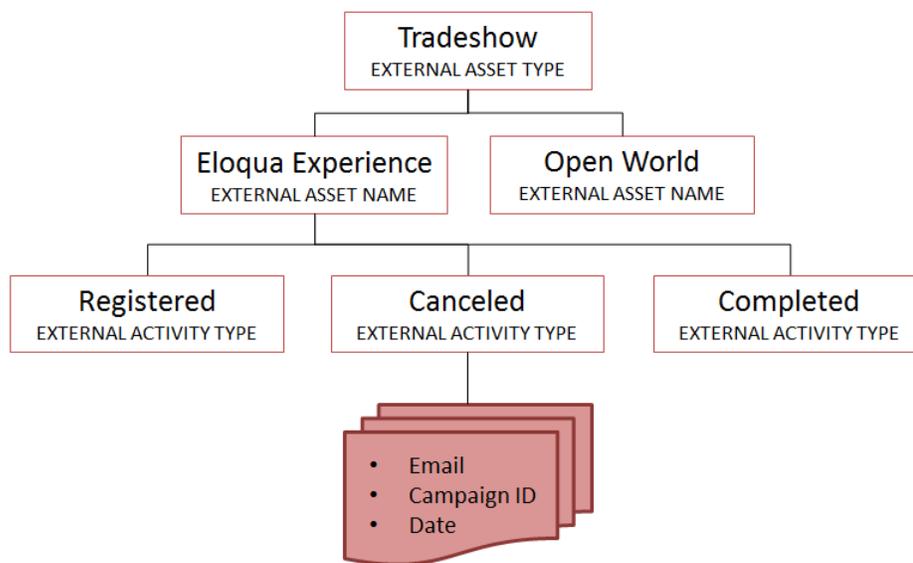
[Learn more by watching the video](#)

## Concepts and definitions

Before beginning the process of importing non-Eloqua assets and activities into Oracle Eloqua, it is important that you have an understanding of the terms related to this functionality, as follows:

- **External Asset Type:** The top-level classification for something that your contacts are performing, for example, a Tradeshow.

- **External Asset Name:** The first sub-category for the asset type. For example, if it is a Tradeshow asset type, then the asset name could be the name of the Tradeshow.
- **External Activity Type:** The specific activity that the contact or prospect performed for this specific external asset. For example, if it is a tradeshow event, then activities could include "Registered", "Canceled", "Completed", and so on.
- **Campaign ID:** The ID of the campaign in Oracle Eloqua. This is reflected in the URL for each campaign. For example, <https://secure.p01.eloqua.com/Main.aspx#campaigns&id=XXX>, where XXX is the campaign ID.
- **Date:** The date of the activity that is being captured. The format is MM/DD/YYYY.
- **Email Address:** The email address of the contact or prospect performing this activity.



For a pre-existing campaign, when you upload external activities into your Oracle Eloqua instance, the upload file must include all of the information above. If you are creating the activity while creating a campaign, you do not need to include the campaign ID.

# Creating external asset types and activity types

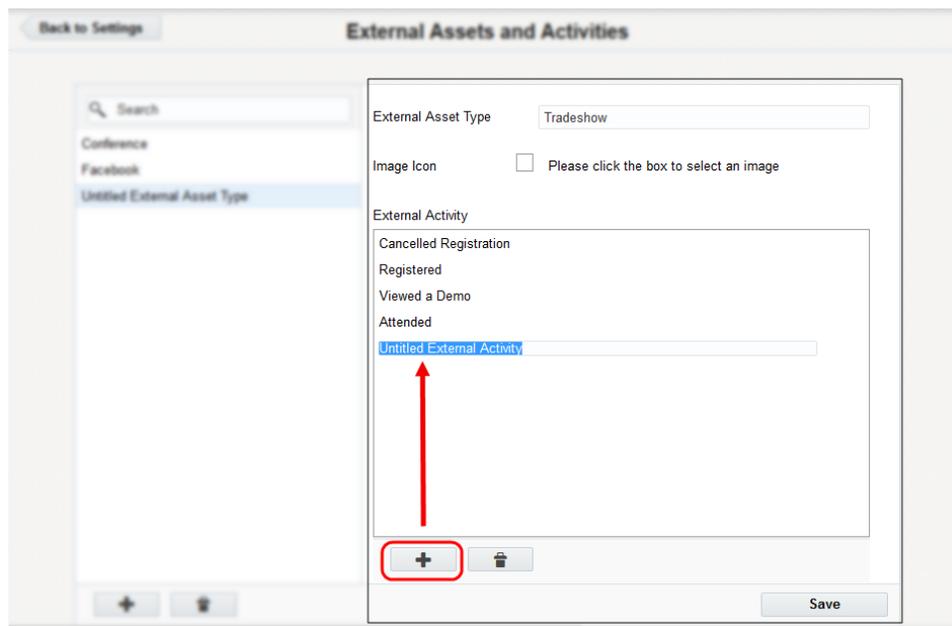
Create external asset types and activity types for the external activities that you want to track. Later, you can upload the external activities for contacts. See [Uploading external activities](#)

**Note:** You should update your response rules as you create new external activities.

## To create external activities:

1. Click **Settings**  and then click **External Activities** in the *Database Setup* section.
2. Create the contact field:
  - In the classic UI, click **Add** .
  - In the Redwood experience, click **Add External Asset**.
3. Provide a name for the asset type. For example, Tradeshow.
4. Add the activity types that contacts will perform for this asset type. For example, Registered or Attended.

- In the Classic UI, click **Add**  in the right pane and provide the activity name in the new row.



- In the Redwood experience, click **Add Activity** and provide the activity name in the new row.



5. When you're done adding activity types, save your asset type.

## Uploading external activities

**Note:** We're updating our help center to reflect the new [Redwood experience](#). During the transition, some content reflects the previous version of the UI.

You can import external activities using an import file. For a more automated solution, consider using the [External activity app](#).

### Before you begin:

- Create your upload file (.txt, .csv, .xls, .xlsx). It must contain the following columns:
  - External Asset Type
  - External Activity
  - External Asset Name
  - Contact Email Address
  - Campaign ID (always include if known)

The Campaign ID can be found in each campaign's URL. For example, <https://secure.p01.eloqua.com/Main.aspx#campaigns&id=XXX>, where XXX is the campaign ID. If you initiate your upload from the campaign canvas, you don't need to provide the campaign ID.

- Date (MM/DD/YYYY format)

**Note:** To ensure the external activity generates a campaign response, the **date** must be between the reporting start date of the campaign and the current day's date. Uploading an external activity with a date before the campaign's reporting start date or after the current date will result in the activity successfully being added to the contact record, however will not create a campaign response for that activity.

- Additional contact fields can be included as well like first and last name, and so on.

**Note:** With Salesforce integration, the Salesforce Campaign ID must be mapped to the *Last SFDC Campaign ID* contact field in Oracle Eloqua, unless a list upload is performed directly to a campaign to create external activities.

- Separate the fields in the upload file using a comma (,), pipe (|), or semi-colon (;).
- The first row of the file must be column headings. Oracle Eloqua will attempt to map the headings to existing Oracle Eloqua fields.
- If you are adding or updating contacts, make sure that you can map the data in your upload file to contact fields in Oracle Eloqua. Use similar naming conventions in your upload file to make this mapping easier.

**Note:** If a contact does not exist in your database, Oracle Eloqua will automatically create the contact.

### To upload an external activity:

1. Navigate to **Orchestration** , then click **Campaigns**.
2. Choose the upload action:
  - In the classic UI, click **Upload External Activities**.
  - In the Redwood experience, click **Actions > Upload External Activities**.

 **Tip:** To upload activities directly to a campaign, first open the campaign, then click **Actions > Upload External Activities**.

3. Complete the information about the upload. You'll want to be sure to click the correct type of upload from the **Import Purpose** drop-down list.
4. Verify the contents of the file on the **Review** tab and click **Next Step**.
5. Complete the field mapping. You need to map both the external activity fields and the contact fields included in your upload file. Make sure that you select when you want the fields to update using the **Update Type** drop-down list. For example, update the field if it is blank or not blank. Using **Set to default** will use the default configuration for each field. In the classic UI, if a specific field should be updated differently than the rest, double-click the field and configure the update type for that specific field.
6. Complete the final step of the wizard. You can add the contacts into a shared list.
7. Click **Finish**.

The activities are uploaded. If a contact does not already exist in your Oracle Eloqua database, Oracle Eloqua will create a contact. Uploading an external activity will also trigger Oracle Eloqua to check when the activity was imported and re-score contacts associated with the imported data based on any active lead scoring models.

#### Resolving issues with an import

If you configured the import to send a confirmation email, the email details results of your import, and it provides links to any failed operations for troubleshooting purposes.

From: Eloqua Activity Upload Notification System <support@eloqua.com>  
 To: Andrew Stiveman  
 Cc:  
 Subject: API Data Import Asset/Activity/Contact completed

**ELOQUA**

**Eloqua Activity Upload Notification**

API Data Import Asset/Activity/Contact completed

Start Time	End Time	Elapsed Time
5/14/2014 4:07:58 PM	5/14/2014 4:08:21 PM	22 seconds

**Activity Upload details:**

Choice	Value
Client	OrionTest
Name	Data Import - 1400098044881
Data upload Source	General (.csv)
Upload Purpose	APIDataImportAssetActivityContact

**Execution details:**

Action	Parameters	Results
Import File	File: Tradeshow External Activity Upload.csv	Total Number of Rows: 5
Validate Email Address		
Validate Asset Type		Invalid Asset Type: 0
Validate Activity		Invalid Campaign Data: 0 Invalid Activity: 0
Create Assets		Created New Assets: 1
Create Activities	Entity Type: Contacts Entity Field: Email Address	New Contacts: 2 Edited Contacts: 3 Created New Activities: 5

If there were any failures, you must resolve them before the import can complete. To resolve a failed import, you must update the original source file with the applicable fixes, and upload the file again.

In the following example, there were five invalid entries for Campaign Data that must be resolved to complete the import. As a result of this failure, no data was imported. To view more details about the failure, you click the link provided.

Subject: API Data Import Asset/Activity/Contact completed

**ELOQUA**

**Eloqua Activity Upload Notification**

API Data Import Asset/Activity/Contact completed

Start Time	End Time	Elapsed Time
5/14/2014 4:04:20 PM	5/14/2014 4:04:34 PM	5 seconds

**Activity Upload details:**

Choice	Value
Client	OrionTest
Name	Data Import - 1400098044881
Data upload Source	General (.csv)
Upload Purpose	APIDataImportAssetActivityContact

**Execution details:**

Action	Parameters	Results
Import File	File: Tradeshow External Activity Upload.csv	Total Number of Rows: 5
Validate Email Address		
Validate Asset Type		Invalid Asset Type: 0
Validate Activity		Invalid Campaign Data: 5 Invalid Activity: 0
Create Assets		Created New Assets: 0
Create Activities	Entity Type: Contacts Entity Field: Email Address	New Contacts: 0 Edited Contacts: 0 Created New Activities: 0

In this example, the import failed because the campaign specified was invalid.

Upload Rejected Rows

Rejected Reason: Invalid Campaigns  
Total Records: 5

Row Number	Email	elqcampaignid	External Asset Type	External Activity	External Asset Name	Date	First Name	Last Name
1	andrew.stivelman@oracle.com	30839	Tradeshov	Registered	Eloqua Experience 2013	11/13/2013	Andrew	Stivelman
2	john.stetic@oracle.com	30839	Tradeshov	Registered	Eloqua Experience 2013	11/13/2013	John	Stetic
3	allison.burnett@oracle.com	30839	Tradeshov	Cancelled Registration	Eloqua Experience 2013	11/13/2013	Allison	Burnett
4	alice@gmail.com	30839	Tradeshov	Attended	Eloqua Experience 2013	11/13/2013	Alice	Johnson
5	fred.finstone@bedrock.biz	30839	Tradeshov	Registered	Eloqua Experience 2013	11/13/2013	Fred	Finstone

Total Records: 5

## Viewing external activities on contact records

**Note:** We're updating our help center to reflect the new [Redwood experience](#). During the transition, some content reflects the previous version of the UI.

To view external activity on a contact record:

1. Navigate to Audience , then click **Contacts**.
2. Locate your contact. Learn more about [searching for contacts](#).
3. Double-click the contact to open the *Edit Contact* menu.
4. Click the **Activity Log** tab.

If the external asset and external activities related to this contact have been correctly uploaded, then you can see that data in the **Activity Log**.

Activity Type	Activity Details	Date and Time
Email Open	Enterprise System Management	4/16/2017 3:32 PM
External Activity	Registered Eloqua Experience2017 Tradeshow	4/16/2017 3:32 PM
Email Clickthrough	Enterprise System Management	4/16/2017 3:32 PM
Email Open	Enterprise System Management	4/16/2017 3:32 PM

## Editing external assets and activities

You can edit an existing external asset and its activities.

### Good to know:

- If you change an asset type's activities, past activity values don't change. If, for example, you change the name of an activity from "Signed Up" to "Registered," previous instances are listed as "Signed Up." Future instances are listed as "Registered." Gather data under current as well as future names if you want to capture historical as well as current values.
- If you rename an external activity type, any response rules associated to that type will need to be updated.

### To edit an external asset and its activities:

1. Click **Settings**  and then click **External Activities** in the *Database Setup* section.
2. Search for and select the asset type you want to update:
  - In the classic UI, select the asset type and make your changes in the right panel.
  - In the Redwood experience, select the asset type. Click the actions menu  and then click **Edit**.

### 3. Edit the list of external activities as needed:

- To delete an activity, in the classic UI, click the activity, then click **Delete** . In the Redwood experience, click .
- To rename an activity, double-click it, then type in a new name.
- To add an activity to the list, in the classic UI, click **Add** , then rename the activity that appears. In the Redwood experience, click **Add Activity** and provide the activity name.

### 4. Save your changes.