# Oracle Fusion Cloud Customer Experience

## Integrating Sales with Oracle Eloqua

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Author: David Yetter

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# 1 About this Guide

## Audience and Scope

This guide is intended for you if you're responsible integrating Oracle Eloqua with Oracle Redwood Sales.

You must perform the integration steps in this guide to integrate Oracle Fusion Service with Oracle Sales.

To set up and work with the more features of Fusion Sales, see Oracle Fusion Sales documentation on Oracle Help Center at https://docs.oracle.com.

# 2 Overview of the Integration

## Overview of the Fusion Sales and Oracle Eloqua Integration

Follow this guide for required implementation and configuration steps to integrate Oracle Fusion Sales and Oracle Eloqua processes. The integration aligns sales and marketing activities across the buying cycle by connecting the segmentation, campaign management, and lead generation processes in Oracle Marketing with lead, contact and account management processes in Fusion Sales.

The integration supports three main data sync flows:

- Fusion Sales account, contact, and lead data is synchronized to Eloqua where you can use it to perform segmentation, and run targeted marketing campaigns to generate new sales leads.
- Leads generated from marketing campaigns in Eloqua can be nurtured and synchronized with Fusion Sales as sales leads.
- Fusion Sales opportunity data is synchronized to Eloqua where you can use it to develop models to measure campaign effectiveness. For example, you can attribute opportunity revenue to marketing campaigns to better calculate the ROI from the campaign.

The integration also features advanced use cases such as:

- You can access digital activities data from Eloqua within the Fusion Sales UI to better understand a contact's digital channel activities and buying behaviors.

  For example through Smart Actions you can use Show Digital Profile to display information such as the number of times a user has submitted a form or visited a website in response to a campaign.
- You can display campaign and campaign member information in Fusion Sales so sales teams can know from which campaign a lead is originating.
- You can display the Eloqua Engage sales tool in Fusion Sales so that salespeople can contact prospects using purpose built marketing templates.
- You can add contacts and leads from Fusion Sales to marketing campaigns in Eloqua. You can do this from the Campaign, Contact, Lead pages or the Workspace in the Fusion Sales UI.

Note that this configuration guide presents the basic integration tasks and use cases and more advanced tasks and use cases designed to show how to integrate Fusion Sales and Eloqua. You can start with the basic integration, and then configure the advanced use cases when your basic integration is up and running.

And finally, know that each implementation of Fusion Sales and Eloqua is unique, and each customer has different needs that have required certain configurations along the way to support unique business requirements. So, while the steps in this guide describe how to connect a non configured Fusion Sales instance to a non configured Eloqua instance, they can be combined with configurations that you might have already applied to your instance.

# How the Eloqua data is synchronized

The Fusion Sales and Eloqua integration give marketers and sales teams control over managing prospects and customers at every stage of the customer lifecycle.

Here's a high level look at a typical data flow:

1. A visitor comes to your company's website and fills out a form.
2. Eloqua creates a prospect record.
3. Once Eloqua qualifies the prospect, marketers assign it to a sales user or queue, which creates a new lead in Fusion Sales and starts the sales cycle.
4. Updates to the lead, such as campaign membership, contact conversion, and account and opportunity association, all sync back to the prospect record in Eloqua giving your marketer a complete view of the prospect's status with your organization.

Here's how data is synchronized:

From Fusion Sales to Eloqua: accounts, contacts, lead historical data, and opportunities are synchronized from Fusion Sales to Eloqua, as shown in the following illustration. When a sales account, contact, lead, opportunity record is synchronized to Fusion Sales, the corresponding record in Eloqua is tagged with the CRM ID of the original Fusion Sales record.

The sync process from Eloqua to Fusion Sales includes contact data updates, and lead generation. Leads are created from new prospects in Eloqua and synchronized to the Lead object in Fusion Sales. During data sync, the following objects sync to one another:

| **Eloqua objects** | **Fusion Sales objects** | **Data Sync** |
| --- | --- | --- |
| Campaign | Campaign | Both directions |
| Campaign Member/Responses | Campaign Member/Responses | From Eloqua to Fusion Sales |
| Contacts | Contacts | Both directions |
| Accounts | Accounts | From Fusion Sales to Eloqua |
| Contacts | Leads | Both directions |
| Opportunities | Opportunities | From Fusion Sales to Eloqua |
| Custom Objects | Custom Objects | Both directions |

# Configuration Roadmap

It's recommended that you get your integration up and running by performing the initial setup tasks shown in the Basic Configuration chapter.

After you're comfortable with the processes of the integration, you can move on to the Advanced Configuration chapter.

Here's a brief road map of the configuration:

- **Initial sync**. The recommended first step toward a successful integration is to pull data (Contacts, Leads, Accounts) from Fusion Sales into Eloqua. This ensures that your marketing organization targets the same audience base as the sales team. Also, the initial sync ensures that all the overlapping entries (such contacts that might be in both Eloqua and Fusion Sales) are tagged with shared identifiers. This is helpful for the next steps, where a Lead or Contact is synchronized from Eloqua to Fusion Sales. Having shared identifiers ensures that duplicate records aren't created in Fusion Sales.
- **Send Leads to Fusion Sales**. This step represents the marketing team handing over qualified leads to the sales team. The automation you configure in this step ensures that leads groomed by marketing are sent over to Fusion Sales for further development. You can start with a basic program in Eloqua, and an integration action to create Leads. As you grow comfortable with the processes, you can build in conditions and logic that suit your business use cases.
- **Sync campaigns, and campaign responses**. Sales teams can be more effective when they have a complete context of their marketing responses and activities of the lead. Campaign and campaign response sync functionality automatically associates Eloqua campaigns with leads when the lead was engaged. This association is related in Fusion Sales for complete transparency with a sales team. You might also configure the Profiler and Engage sales tools to enhance the collaboration between sales and marketing teams.

## Integration Assumptions and Constraints

Before you start on your Fusion Sales and Eloqua integration, consider the following assumptions and constraints:

- Not all fields visible on the Fusion Sales Contact, Account and Lead objects are available in the integration. Check the fields that are available before completing field mapping.
- Fields that allow multiple selections aren't supported by default in this release of the integration. You can use Oracle extensibility tools to enable this functionality, though.
- When Fusion Sales contact and lead records are merged or deleted, these changes aren't synchronized to Eloqua.

# 3 Basic Configuration

## Required Roles

To do the configurations required for this integration you must have the following Fusion Sales job roles: Employee, Resource, Sales Administrator and Custom Objects Administration.

Also any role with enough privileges to view, change, and create leads, contacts, accounts, opportunities, and campaigns in Fusion Sales can be used for configuring the integration.

For Eloqua it's recommended a user with the Administrator persona perform the integration.

## Create Contact and Account Fields in Eloqua

As a prerequisite to the integration, you must create Contact and Account fields in Eloqua to map contact and account data from Fusion Sales.

You'll use these fields later, in the Connections set up area of Eloqua, when you specify which Eloqua fields are to be used for matching with Fusion Sales fields.

*Related Topics*

- Creating recommended contact and account fields

## Install the Integration App and Configure a Connection

Now you install and configure the Oracle CX Sales Integration app from Oracle Cloud Marketplace. For more information, see the Installing the Oracle CX Sales Integration app in the Fusion Sales Integration App User Guide.

*Related Topics*

- Installing the Oracle CX Sales Integration app

## Import Contacts, Accounts and Leads

The next step is to import data from Fusion Sales into Eloqua. By running the import, the identifiers (email, party ID, party number) for the accounts and contacts are updated in Eloqua.

The initial import ensures that the identifiers are shared between the two systems, and then later imports maintain the sync. You import accounts, contacts, and leads. Once you've set them up, for a given record type, a new import job starts, 15 minutes after the previous one has completed. This ensures that there are no multiple import jobs running in parallel for the same record.

> **Note:** If you include PrimaryAddress fields in your sync configurations you must include the Fusion Sales PrimaryAddress.AddressNumber field in your mappings. The address number field is required when you want to update contacts from Eloqua into Fusion Sales using an action and when you're mapping any address field. If you don't include the address number in the action mapping, the call will fail. To have the address number information in Eloqua you must store it in a custom field. You then take the value from Fusion Sales imports. In the case of mapping contacts, you map the address number along with the registry number that you take from Fusion Sales after the contact gets created in Fusion Sales.

See the Related Topics section for information on creating imports, and for creating default assets which will enable you to more quickly create your imports. Both topics are in the Oracle CX Sales Integration App User Guide.

*Related Topics*

- Creating imports
- Creating default assets

# Create a Lead Action

You use Actions in the Integration app to sync Contacts and Leads from Eloqua to Fusion Sales. Now you'll create the Lead action. After you do you can sync leads generated from Eloqua campaigns to Sales Leads in Fusion Sales.

For more information, see Creating step actions in the Oracle CX Sales Integration App User Guide.

*Related Topics*

- Creating step actions
- Creating default assets

# Use Recommended Programs to Trigger Actions

Unlike imports, actions aren't triggered automatically. Actions must be triggered based on certain conditions (such as contact activity gathered by Eloqua, or lead score increase tracked by Eloqua).

Use the Program Canvas in Eloqua to set up the conditions under which leads and contacts are created or changed from Eloqua to Fusion Sales.

The actions you've created in the integration app (such as the Create Lead action), can be used as steps in the Program Canvas. When a contact enters the program, they will be subject to the configured steps, depending on the Program definition and conditions specified.

As an example, you might want to configure a program to create a Lead in Fusion Sales, whenever a contact is created in Eloqua.

# Refine the Integration

Once you've gotten the basics of your integration, and it's up and running, you'll most likely want to refine certain aspects of it, such as:

- Update lead actions or contact actions.
- Configure data priority for imports.
- Configure filters on imports instead of importing all records.
- Sync fields you created for your organization.
- Avoid synchronizing certain fields that you're not using.

See the Related Topics area for more information.

*Related Topics*

- Creating step actions
- Creating imports
- Using the Oracle CX Sales app in a program or campaign

# 4 Advanced Integration Tasks and Use Cases

## Send Eloqua Campaign Responses to Fusion Sales

Campaign Responses in Eloqua are synchronized to the out-of-box object Campaign Member in Fusion Sales. Campaign responses and campaign member records associate a lead or a contact with a campaign.

Its attributes also include the status (such as, email opened, email clicked) and the associated time stamp.

Eloqua gathers responses to its marketing campaigns such as emails opened, emails clicked, and so on. Synchronizing these responses to Fusion Sales provides the marketing context to your sales team. This is achieved by synchronizing campaigns and campaign responses from Eloqua to Fusion Sales, using respective Actions. A Program in Eloqua automates the continuous sync, and it honors the Response Rules in Eloqua while synchronizing the responses. You also must make sure that you expose the appropriate subtabs and analytics reports in Fusion Sales, to view the synchronized campaigns and campaign responses.

### Campaign Action and Campaign Response Action

Here are the two actions that you configure:

- The **Campaign Action** runs when the status of a campaign changes in Eloqua, and synchronizes new campaigns or an updates to existing campaign to Fusion Sales.
- The **Campaign Response Action** runs when, for example, an email is clicked or opened, and the action synchronizes these campaign responses from Eloqua to Fusion Sales.

For more information creating these actions, see the Related Topics section for a link to the topics in the Oracle CX Sales Integration App User Guide

### Program to Sync Campaign Responses

Your implementation includes programs to sync campaign responses collected in Eloqua with Sales Leads in Fusion Sales.

You create a Program, which uses the Campaign Response Action that you created in the previous section.

For more information, see the Related Topics section for a link to the Using the app in a program or campaign topic in the Oracle CX Sales Integration App User Guide.

### Configure Response Rules

You use Actions to send data from Eloqua to Fusion Sales, and you use Response Rules to governs the actions themselves.

Response rules define:

- Which campaign responses are synchronized to Fusion Sales.
- The priority order of responses. For example, you might consider an email click a higher priority than an email open. Any campaign response with lower priority, will be updated and overwritten by a higher priority response.
- The program that syncs the campaign responses.

You can also control which Fusion Sales Campaign Member status is mapped to each campaign response activity in Eloqua. Fusion Sales includes three campaign member status values which are shown in the following list.

> **Note:** The Campaign Member subtab in Fusion Sales only displays the Campaign Members that have the Status ORA_ADDED. Campaign Members that are synchronized from Eloqua to Fusion Sales that have the Campaign Member Status ORA_SENT or ORA_RESPONDED will not be displayed in the Campaign Member subtab and can only be viewed through analytics.

- ORA_SENT: Can be mapped to an Email Send activity in Eloqua.
- ORA_RESPONDED: Can be mapped to Email Open or Email Click activity in Eloqua.
- ORA_ADDED: Not used for mapping. It's used to indicate contacts and leads added to Eloqua from Fusion Sales. See the Campaign Member Import Process topic for more information.

> **Note:** You can create custom campaign member statuses in Fusion Sales (such as ORA_EMAIL_OPENED, or ORA_EMAIL_CLICKED) and use them for mapping in the Eloqua Response Rules configuration.

For more information, see the Related Topics section for a link to the Creating response rules in the Oracle CX Sales Integration App User Guide.

## Enable Campaign Pages in Fusion Sales

You enable campaign pages in Fusion Sales. For Sales people, you use Smart Actions and Foldout Panel Enablement Extensibility to show Edit Lead and Edit Contact UI functionality. For Sales Managers you use Smart Actions to show Campaign Analytics. The following table gives you a brief overview of each task you perform.

For more information, see the Related Topics section for a link to the Implementing Sales guide.

*Related Topics*

- Implementation Reference
- Using the Oracle CX Sales app in a program or campaign
- Creating campaign actions
- Creating response actions
- Campaign response rules for CRM integration

# How Lead Scores are Synchronized from Eloqua to Fusion Sales

You can configure automated lead scoring, ranking and qualification in Eloqua which lets you:

- Define lead scoring rules to assign number-based score to the lead.
- Assign ranking rules quantitatively, with values such as, Hot, Warm, or Cold
- Define qualification rules with a combination of conditions that can automatically turn the status of a lead to Qualified.

Sync all these values in Eloqua and define scoring models to calculate lead scores. Scoring models keep the lead score updated every 24 hours, or whenever a contact performs a relevant marketing activity.

To enable this functionality, you just need to perform the following setup steps.

1. Create a custom field for the Fusion Sales Lead object, and call the field Eloqua Lead Score.
2. The Create Lead and Update Lead actions create a mapping to Fusion Sales. While you're mapping, you use the Eloqua field **Rating: (Lead Scoring Model Name)** to map to the Eloqua Lead Score field in Fusion Sales. This synchronizes the Lead Score value (A1, B1, C2, and so on) from Eloqua to Fusion Sales.
3. Use the synchronized values of the Eloqua Lead Score to rank the leads in Fusion Sales with values of Hot, Warm and Cold.

   > **Note:** You can also use the Lead score value in the Program Canvas, so that only leads with high score are synced from Eloqua to Fusion Sales.

*Related Topics*

- Lead scoring

# Assign Synchronized Eloqua Leads to Fusion Sales

You can set up your configuration to enable you to identify which marketing source a lead came from. Configuring a Lead Source field in Fusion Sales complements the Eloqua Create Lead and Update Lead actions.

You can then use this field to identify whether a lead was synchronized from Eloqua and to enable you to identify the source of the lead.

# Add Contacts and Leads from Fusion Sales to Campaigns in Eloqua

Your sales team is in regular touch with customers and has a good understanding of their needs.

This puts your sales staff in the best position to recommend whether a contact or a lead would best fit a specific marketing campaign, such as a special event or a key account marketing campaign. Use the Fusion Sales and Eloqua integration to make collaboration between sales and marketing easier.

Using the integration, your sales team can add contacts or leads to Eloqua marketing campaigns from these locations within your Fusion Sales application.

## Prerequisites

The Fusion Sales instance must be integrated with an Eloqua instance, and Campaign synchronization from Eloqua to Fusion Sales must be set up.

> **Note:** If you plan to sync Eloqua Campaigns to Fusion Sales, it's recommended that you specify distinguishing names and descriptions for each campaign. These fields are be mapped to corresponding fields in Fusion Sales, and will help guide sales users to choose the correct campaigns when adding prospects to them.

## Required Changes in Fusion Sales

You must use Application Composer to enable at least one the following touch-points to allow your users to add contacts and leads to Eloqua campaigns.

- The Campaigns subtab on the Edit Contact page, and the Add to Campaign button on this subtab.
- The Campaigns subtab on the Edit Lead page, and the Add to Campaign button on this subtab.
- The Campaign Members subtab on the View Campaign page, along with either or both of the Add Leads button and the Add Contacts button on this subtab.
- The Add to Campaign Smart Action on the Contacts list in the Workspace.
- The Add to Campaign Smart Action on the Leads list in the Workspace.

You must also add the following two functional security privileges for those users who will be adding leads and contacts to campaigns:

- MKT_MANAGE_MARKETING_INTEGRATION_CAMPAIGN_MEMBER_PRIV
- MKT_VIEW_MARKETING_INTEGRATION_CAMPAIGN_PRIV

When a user adds a lead or a contact to a campaign, a Campaign Member record is created within Fusion Sales with `MemberStatus` value of: `ORA_ADDED`.

## Required Changes in Eloqua

Now, here are the required changes you must make in Eloqua.

## Campaign Member Custom Object

You must create this custom object in Eloqua. The Campaign Member custom object corresponds to the Campaign Member object in Fusion Sales. When campaign member records are imported from Fusion Sales to Eloqua, they will be stored in Eloqua as records of the Campaign Member custom object type.

## Campaign Member Import Process

You must create a new import process inside the Oracle CX Sales Integration App. This import process synchronizes the Campaign Members from Fusion Sales to the Campaign Member custom object in Eloqua, created in the previous section. To do this see the Creating Imports topic in the Oracle CX Sales Integration App User Guide.

Make sure you use the filter `MemberStatus = 'ORA_ADDED'` when you create the import.

You must select the checkbox to link the CDO records to Contacts in Eloqua.

And finally, map the following campaign member attributes from Fusion Sales during the import process:

- Campaign Member Id
- Campaign Id
- Lead Id
- Contact Id
- Email
- Member Status

- Response Date

## Create a Segment of Eloqua Contacts to Use in Campaigns

You must create a segment of contacts linked to the Campaign Member CDO in Eloqua. This will represent the campaign members imported from Fusion Sales.

It's recommended that you create one segment of imported campaign members for each Eloqua campaign. By doing this, you can easily count prospects added to each campaign and use individual segments as one of the Listener steps in Campaign Canvas.

If you do create one segment for each campaign in Eloqua, makes sure you use the Campaign Id from the imported campaign member as a "field condition".

*Related Topics*

- Creating imports

# Synchronize the Do Not Email Preference from Fusion Sales to Eloqua

Fusion Sales includes a provision that enables you to store email opt-out information for Contact records. Salespeople can use the Do Not Email checkbox field to store whether a contact wants to receive emails or not.

With the integration you can sync this preference to Eloqua, and unsubscribe those contacts from Eloqua emails.

Here's how you do it:

1. Create a new Contact import in the integration app.

   > **Note:** This import is an additional import, apart from the regular Contact import.

2. Use the Filter (DoNotEmailFlag='true') in the contact import to tell the import job to only process those contacts that have the **Do Not Email** checkbox selected in Fusion Sales.
3. In the **Post Processing** section of the contact import, add a row **Global Subscribe = Unsubscribe**.

Now that you've enabled this import, it will run every 15 minutes like the rest of the imports. It will find any contacts in Fusion Sales that have the Do Not Email checkbox selected, and opt them out of Eloqua emails.

*Related Topics*

- Creating imports

# 5 Oracle Eloqua Sales Tools

## Overview of Profiler and Engage

The Eloqua sales tools, Profiler and Engage, can be embedded within Fusion Sales screens.

- Profiler gives your sales representatives details about contacts along with activity information and lead score value from Eloqua.
- Engage helps your sales force organization maintain a consistent branding message in communications to contacts and leads.

Since the tools are embedded in the Fusion Sales UI, the user doesn't need to leave Fusion Sales.

To access Profiler or Engage, your Sales team members must have their user login information created in Eloqua. These users must also have Eloqua Profiler or Eloqua Engage licenses, respectively.

*Related Topics*

- Profiler documentation
- Embedding Profiler as a subtab in Oracle Sales
- Engage documentation
- Embedding Engage as a subtab in Oracle Sales