ORACLE®

Oracle CX Marketing and Oracle CRM on Demand Integration

Configuration Guide

Contents

Oracle CRM On Demand integration

These instructions outline how to perform the necessary configuration in Oracle CRM On Demand as part of the integration with Oracle Eloqua. These steps are only relevant once an Oracle Eloqua has been setup and the integration with Oracle CRM On Demand has been configured. It is also necessary for Oracle CRM On Demand users to have an Oracle Eloqua login, unless Single Sign On has been enabled.

Privileges Requirements

The user configuring the Oracle Eloqua integration requires the following Oracle CRM on Demand privileges:

- Customize Application

- Manage Users and Access

- Manage Custom Web Applets

Completing the configuration in Oracle CRM On Demand as part of the integration with Oracle Eloqua involves the following steps:

1. Creating four custom web applets
    a. Contact object: Marketing Cloud Profiler add-on, if used
    b. Contact object: Marketing Cloud Links
    c. Lead object: Marketing Cloud Profiler add-on, if used
    d. Lead object: Marketing Cloud Links

2. Updating the Never Email field for the Lead and Contact objects

3. Creating custom fields on the Lead and Contact objects

4. Creating a custom web tab for the Marketing Cloud Engage add-on, if used

5. Updating the page layouts with the new applets and fields

6. Adding the Marketing Cloud Engage custom web tab, if used

Creating custom web applets

The custom web applets to be created will embed Marketing Cloud Profiler in the Lead and Contact Objects so users can see what marketing activities have been taken over time. The Marketing Cloud Links applet provides a series of helpful links to launch different aspects of Oracle Eloqua, such viewing the activity history within Oracle Eloqua. It is the best practice to create marketing links for both the lead and contact objects.

A. **Marketing Cloud Profiler on the contact object**

1. In the upper-right corner of any page, click the Admin global link.

2. In the *Application Customization* section, click the **Application Customization** link.

3. In the *Record Types Setup* section, click the link for the contact record type.

4. In the *Page Layout Management* section, click the **Contact Web Applet** link.

5. In the record type applet list, click **New**.

6. On the *Web Applet* page, complete the following fields:

Parameter	Value
Name	Marketing Cloud Contact Profiler
Location	Detail Page
Type	URL
URL	a. **If you choose to do direct**: https://<podURL>/apps/profiler/index.aspx?emailAddress=<emailAddress> 1. Replace <podURL> with the Oracle Eloqua URL for your company, this can be determined by the browser URL when you log into Oracle Eloqua, it is one of:

Paramet er	Value

- www02.secure.eloqua.com
- secure.p03.eloqua.com
- secure.eloqua.com

2. Replace <emailAddress> with the context sensitive parameter by selecting the email field from the **Contact Fields** list.

b. **If you choose to do auto-login**:

https://login.eloqua.com/autoLogin?LoginPrefix=<LoginPrefix>&Url=/apps/profiler /index.aspx

?emailAddress=<emailAddress>

1. Replace <LoginPrefix> where prefix is a 4 character identifying code, such as ELQA. You can alternatively use <siteID> with your site ID, a numeric code such as 33 (it may be much longer). Your Oracle CX Marketing administrator can locate your site ID and login prefix from the *Company Defaults* section of the application. You can also choose to ignore this parameter and it will attempt to log you in using the first Oracle CX Marketing saved credential it finds.

2. Replace <emailAddress> with the context sensitive parameter by selecting the email field from the **Contact Fields** list.

c. **If you choose SAML**:

https://login.eloqua.com/auth/saml2/autologin?CheckFrame=false&LoginPrefix=<L oginPrefix>&I

ldp=<IDPid>&ReturnUrl=apps%2Fprofiler%3FemailAddress%3D

1. Replace <LoginPrefix> where prefix is a 4 character identifying code, such as ELQA. You can alternatively use <siteID> with your site ID, a numeric code, such as 33 (it may be much longer). Your Oracle CX Marketing administrator can locate your site ID and login prefix from the *Company Defaults* section of the application. You can also choose to ignore this parameter and it will attempt to log you in using the first Oracle CX Marketing saved credential it finds.

2. Replace <IDPid> is the IDP unique ID from your SSO setup as completed in single sign-on

Paramet er	Value
	(SSO): resource center.
Height	610

B. **Marketing Cloud Profiler on the lead object**

The same steps above can be followed to create the Marketing Cloud Lead Profiler for the lead object.

C. **Marketing Cloud Links Applet on the lead object**

    a. In the upper-right corner of any page, click the Admin global link.

    b. In the *Application Customization* section, click the **Application Customization** link.

    c. In the *Record Types Setup* section, click the link for the lead record type.

    d. In the *Page Layout Management* section, click the **Lead Web Apple**t link.

    e. In the record type applet list, click **New**.

    f. On the *Web Applet* page, complete the following fields:

Para met er	Value
Nam e	Marketing Cloud Weblinks
Loca tion	Detail Page
Type	HTML

Parameter	Value

Web Applet HTML	`<table cellpadding="0" cellpadding="0" style="border: 0; width: 100%; padding: 5px 5px 5px 5px; background: #EFEFF0; font-family: Arial, Times New Roman; font-size: 12px;">`
	`<tr>`
	`<td rowspan="2" style="text-align: left; vertical-align: top; width: 33%;">`
	`<a target="_blank" href="http://www.eloqua.com" style="text-decoration: none;">`
	`<img src="http://media.eloqua.com/designimages/new-oracle-logo2.png" style="border: 0;"`
	`alt="Oracle Eloqua" /></a>`
	`</td>`
	`<td style="text-align: left; vertical-align: top; width: 33%;">`
	`<a target="_blank"`
	
	`href="https://<podURL>/cvp.aspx?LP=ZZZZ&URL=FlexReports/DisplayReport2.aspx`
	`?StandardReportID=1297%26EmailAddress=%%%Email_Address%%%"`
	`style="text-decoration: none; color: Black;">Campaign Activity Overview </a>`
	`</td>`
	`<td style="text-align: left; vertical-align: top; width: 33%;">`
	`<a target="_blank" href="https://<podURL>/cvp.aspx?LP=ZZZZ&URL=`
	`EmailUnsubscribeByAddressAsAgent.asp?elqEmailAddress=%%%Email_Address%%%"`
	`style="text-decoration: none; color: Black;">Unsubscribe</a>`

Parameter	Value

	`</td>`
	`</tr>`
	`<tr>`
	`<td>`
	`<a target="_blank" href="https://<podURL>/cvp.aspx?LP=ZZZZ&URL=`
	`apps/engage#sendTemplateEmailToContacts/%%%Email_Address%%%"`
	`style="text-decoration: none; color: Black;">Engage</a>`
	`</td>`
	`</tr>`
	`</table>`

Height	610

↖**Note**: Replace <podURL> with the Oracle Eloqua URL for your company. This can be determined by the browser URL when you log into Oracle Eloqua, it is one of:

- www02.secure.eloqua.com
- secure.p03.eloqua.com
- secure.eloqua.com

Also replace ZZZZ with the login prefix for your company. Your Oracle CX Marketing Administrator can locate your login prefix from the Company Defaults section of the application.

D. **Marketing Cloud Links Applet on the Contact Object**

The same steps above can be followed to create the Marketing Cloud Links Applet for the

Contact object.

Updating the Never Email field on the lead and contact object

1. In the upper-right corner of any page, click the Admin global link.

2. In the Application Customization section, click the Application Customization link.

3. In the Record Types Setup section, click the link for the Lead record type.

4. In the Field Management section, click Lead Field Setup.

5. On the Fields page: Click Edit beside the "Never Email" field.

6. Select the "Read Only" check box to make this field Read Only.

7. Repeat the above steps for the Contact Object.

Creating custom fields on the lead and contact object

Create the read-only "Marketing Cloud Lead Rating" and "Lead Source – Most Recent" fields on the Lead and Contact Object. The "Marketing Cloud Lead Rating" stores the lead score as calculated by Oracle Eloqua and the "Lead Source – Most Recent" stores the most recent lead source captured in Oracle Eloqua.

1. In the upper-right corner of any page, click the Admin global link.

2. In the Application Customization section, click the Application Customization link.

3. In the Record Types Setup section, click the link for the Lead record type.

4. In the Field Management section, click Lead Field Setup.

5. On the Fields page, click New Field.

6. On the Field Edit page, enter the following information:

Parameter	Value
Display Name	Marketing Cloud Lead Rating
Field Type	Text (Short)
Copy Enabled	True

7. Click Save.

8. On the Fields page, click New Field.

9. On the Field Edit page, enter the following information:

Parameter	Value
Display Name	Lead Source – Most Recent
Field Type	Text (Short)
Copy Enabled	True

10. Repeat the above steps to create the "Marketing Cloud Lead Rating" and the "Lead Source – Most Recent" custom fields for the Contact Object.

Creating a custom web tab for Engage

If you have purchased the Engage Add-On for Oracle Eloqua, there are two ways to leverage the solution. First is to create the web tab manually, and second is to use the pre-built integration that will provide buttons instead of a new tab. If using the web tab approach, users will need to select the Engage Web Tab and manually enter email addresses. If using the pre-built approach, users will be able to send email addresses from a detail or list page by clicking a button.

A. **Adding the Web Tab Manually**

   1. In the upper-right corner of any page, click the Admin global link.

   2. In the Application Customization section, click Application Customization.

   3. In the Application Setup section, click the Custom Web Tabs link.

   4. On the Custom Tab List page, click New.

   5. On the Custom Web Tab page, enter the following information:

Parameter	Value
Name	Marketing Cloud Engage
Type	URL
URL	The two options include: 1. **Email Templates**: The format for this URL is: https://<podURL>/apps/engage/index.aspx#sendTemplateToContacts/%%%Email_Address%%% 2. **New Email**: The format for this URL is: https://<podURL>/apps/engage/index.aspx#sendBlankEmailToContacts/%%%Email_Address%%%

Parameter	Value
	a. Replace \<podURL> with the Oracle Eloqua URL for your company. This can be determined by the browser URL when you log into Oracle Eloqua; it is one of: • secure.eloqua.com • www02.secure.eloqua.com • secure.p03.eloqua.com
Height	750

B. **Use the Pre-built Integration**

The pre-built integration uses privileges to enable a button on the Contact and Lead detail pages as well as the Contact and Lead list pages. The button is driven by the same URL that you would access Engage with, and will open up a new window instead of navigating to a web tab.

Enable Privileges

There are two privileges used to enable the Oracle Eloqua functionality accessible through buttons. These privileges are not required if you are manually creating the Engage tab.

Privilege	Use
Manage Oracle Eloqua Marketing Cloud Service Integration	Allows administrators to provide the URL to access Engage, and enable the privilege on other roles. This privilege is required to complete the steps below.
Oracle Eloqua Marketing Cloud Service Integration	Allows end users to have buttons on the Contact and Lead Detail Pages and the Contact and Lead Lists Pages. This privilege is required to have the buttons appear.

Enable Engage

1. In the upper right corner of any page, click the Admin global link.

2. In the Application Plug-In section, click the Oracle Eloqua Marketing Cloud Service link. Provide the following URL in the Engage URL field: https://<podURL>.

3. Replace <podURL> with the Oracle Eloqua URL for your company. This can be determined by the browser URL when you log into Oracle Eloqua; it is one of:

   - secure.eloqua.com

   - www02.secure.eloqua.com

   - secure.p03.eloqua.com

4. Select the "Allow sending emails from lists" check box to enable Oracle CRM On Demand to send emails to a list of customer contacts using Oracle Eloqua.

   Note: Not enabling this check box will mean that users will only be able to send an email by button click from the detail page.

5. Click Save.

Updating page layouts

With the web applets, fields and web tab created, the final step is to add them to the page layouts and roles that require them.

A. Adding the Marketing Cloud Contact Profiler Applet to the Contact Page Layout.

   1. In the upper right corner of any page, click the Admin global link.

   2. In the Application Customization section, click the Application Customization link.

   3. In the Record Type Setup section, click the Contact record type link.

   4. In the Page Layout section, click the Contact Page Layout link.

   5. Click "Edit" next to the page layout you wish to add the Profiler applet to. Note: If you do not have any custom page layouts, you will need to create a new one by copying the default page layout provided. After providing a name in Step 1 of the page layout wizard, proceed to the next step.

   6. Select "Step 4 Related Information" in the Page Layout Wizard.

   7. In the far left list called "Not Available Information", locate the "Marketing Cloud Contact Profiler" and the "Marketing Cloud Links" applets and press the left and right arrows until the entries appears in the "Displayed Information" list. You may select the up and down arrows to change the order of the applets.

   8. Click "Finish".

   9. If you created a new page layout in Step 5, assign the new page layout to the Role that will have access to Profiler. If you used an existing page layout, skip to Step 10.

      a. In the upper right corner of any page, click the Admin global link.

      b. In the User Management and Access Controls section, click User Management and Access Controls.

      c. In the Role Management section, click Role Management.

      d. Select "Edit" next to the role that you wish to have the web applet added to.

      e. Select "Step 6 Page Layout Assignment".

      f. Scroll down until you see "Contact" in the "Record Type" column.

g. In the "Page Layout Name" column, select the page layout you created in Step 5.

h. Click "Finish".

10. Finally, deploy the new page layout to your users:

a. If users are not allowed to edit their personal layout, then there are no additional steps for you to complete for deploying the new page layout to your users.

b. If users have edited their personal layout, you can do one of the following for the applets to be displayed:

    a. Reset the users' layout. This will force all users of a particular role back to the default page layouts assigned to that role.

        1. In the upper-right corner of any page, click the Admin global link.

        2. In the User Management and Access Controls section, click the User Management and Access Controls link.

        3. On the User Management and Access Controls page, in the Personalization Management section, click the Reset Page Layouts link to open the Page Layout Reset page.

        4. Select Role, select the role for which you want to reset the page layout, and click Next.

        5. In Step 2, Select Layout, choose the Contact layouts and move it from the Available section to the Selected section using the left and right arrows, and click Next.

        6. In Step 3, Confirm, verify your selections, and then click Finish to save your changes.

        7. There are no further steps need to be taken by the administrator; the users will have to log out and log back in to see the changes.

    b. Alert users that a new applet is available by email, and instruct them to add it to their personal layout by having them complete the following: (**Note**: these steps do *not* require the privileges outlined at the start of the document, only that the user has the "Personalize Detail Page" privilege)

        1. In the upper-right corner of any page, click the My Setup global link.

        2. In the Layout Personalization section, click the Personal Layout link.

        3. In the Personal Detail Page Layout section, click the Contact Layout link.

        4. In the Available Related Information section, select the "Marketing Cloud Contact Profiler" and the "Marketing Cloud Links" applets, and click the arrow to move it to the Displayed Related Information section. The users may press the up and down arrow buttons to place the applet at the desired location.

        5. Click "Save" and log out and log back in to see the updated layout.

B. **Adding the Marketing Cloud Lead Profiler and Marketing Cloud Weblinks applet to the Lead Object.**

The same steps above can be followed to add the Marketing Cloud Lead Profiler and the Marketing Cloud Weblinks applets to the Lead object, except substitute "Lead" for "Contact" when referring to the Layouts or Roles.

C. **Adding the Marketing Cloud custom fields to the Lead and Contact Object.**

1. In the upper right corner of any page, click the Admin global link.

2. In the Application Customization section, click the Application Customization link.

3. In the Record Type Setup section, click Lead record type link.

4. In the Page Layout section, click the Lead Page Layout link.

5. Click "Edit" next to the page layout you wish to add the "Marketing Cloud Lead Rating" and "Lead Source – Most Recent" fields to. Note: If you do not have a custom layout, you will need to create one by copying the default layout provided. After providing a name in Step 1, proceed to the next step.

6. Click "Step 2 Field Setup" in the Page Layout Wizard and search for the "Marketing Cloud Lead Rating" and "Lead Source – Most Recent" fields.

7. Select the Read Only check box to make these fields read only.

8. Click "Step 3 Field Layout" in the Page Layout Wizard and search for the "Marketing Cloud Lead Rating" and "Lead Source – Most Recent" fields in the "Available Fields" list.

9. Use the right and up arrow buttons to move the fields from the "Available Fields" list to the page layout section you want the fields to show up in.

10. Click "Finish".

11. If you created a new page layout, assign the page layout to the role that requires the fields. If you used an existing page layout, proceed to Step 10.

    a. In the upper right corner of any page, click the Admin global link.

    b. In the User Management and Access Controls section, click User Management and Access Controls.

    c. In the Role Management section, click Role Management.

    d. Select "Edit" next to the role that you wish to have the fields added to.

    e. Select "Step 6 Page Layout Assignment".

f.   Scroll down until you see "Lead" in the "Record Type" column.

g.   In the "Page Layout Name" column, select the page layout you created in Step 5.

h.   Click "Finish".

12.   Users will see the new fields once they logout and back in.

13.   The above steps can be followed for the Contact object; substitute "Lead" with "Contact" when referring to the Layouts or Roles.

Adding the Engage custom web tab

This procedure is only applicable if you have added the Engage tab manually.

1. In the User Management and Access Controls section, click User Management and Access Controls.

2. In the Role Management section, click Role Management.

3. Select "Edit" next to the role that you wish to have the web applet added to.

4. Select "Step 5 Tab Access and Order".

5. In the "Not Available" list, find the "Engage" tab and use the right arrow button to move it to the "Selected Tabs" list. Use the up and down arrows to move the tab to the desired order. Note: You can move it to the "Available Tabs" list if you allow the user to personalize their Tab Layouts. (See next step.)

6. If your users have personalized their Tab Layouts, they will need to add the tab. Users with the "Personalize Tabs" have the ability to change what tabs they have access to.

   Alert your users via email that a new tab has been created. Your users will need to perform the following steps:

   a. In the upper-right corner of any page, click the My Setup global link.

   b. In the Layout Personalization section, click the Personal Layout link.

   c. In the Personal Tab Layout section, click the Tab Layout link.

   d. In the Available Tabs section, select the Engage tab, and then click the right arrow button to move it from the Available Tabs section to the Selected Tabs section.

   e. Click "Save" and log out and log back in to see the updated layout.

You have now completed all steps necessary to integrate Oracle Eloqua with Oracle CRM On Demand. If you have Single Sign On enabled for Oracle Eloqua, your users

can start to leverage the powerful functionality available to them. If Single Sign On is not enabled, the first time that users access the Lead/Contact Profiler or Engage Tab, they will be asked for their Oracle Eloqua login. Once provided, be sure they select the "Remember Me" check box so they will not be asked to login again.