Lead Scoring CRM Integration

Configuration Guide

07-Nov-2018

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1 Lead scoring CRM integration setup

Integrate your CRM with Eloqua by creating a dedicated Eloqua program to perform updates of the Lead Score field in CRM. The following configuration steps walk you through creating this program.

Prerequisites

- Customer Administrator rights are required.

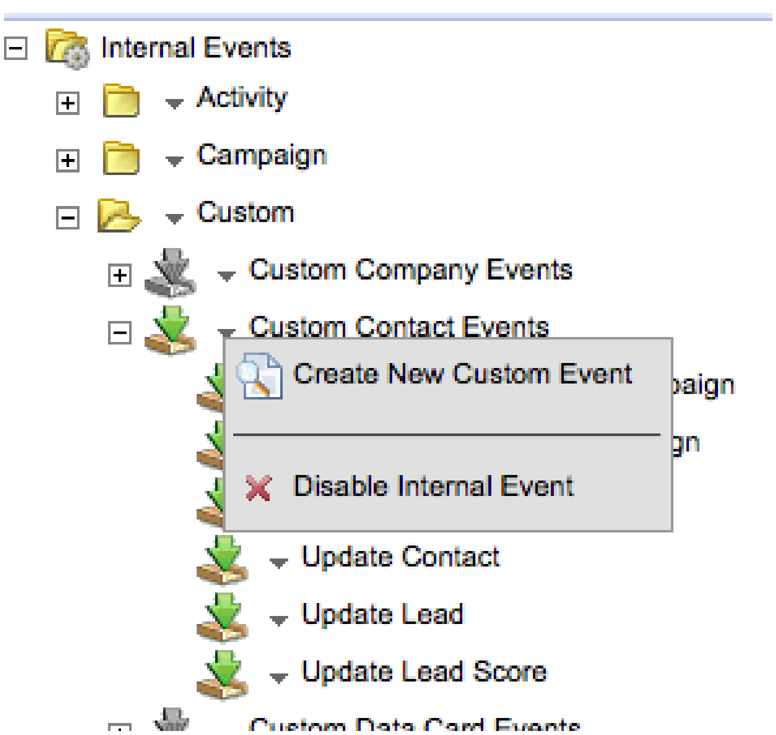
To configure lead scoring CRM integration

1. Create two new internal events and external calls
2. Create a new shared filter
3. Create a program
4. Configure program feeder
5. Adding exclusions (optional)

2 Creating two new internal events and external calls

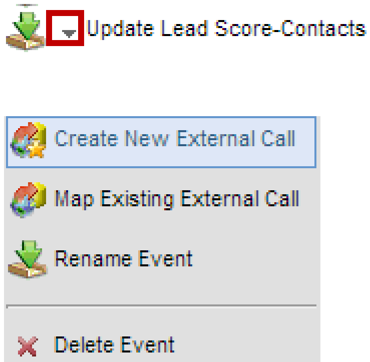
To create two new internal events and external calls:

1. Click **Settings** ⚙.
2. Click **Integration** in the *Platform Extensions* area.
3. Click the **Outbound** tab.
4. From the left column tree view, expand the **Custom** folder.
5. From the drop-down menu next to Custom Contact Events, select the option **Create New Custom Event**.



6. Enter the Custom Event Name “Update Lead Score-Contacts”, then click **Save**.

7. From the drop-down menu next to the new Internal Event, Update Lead Score-Contacts, select the option **Create New External Call**.

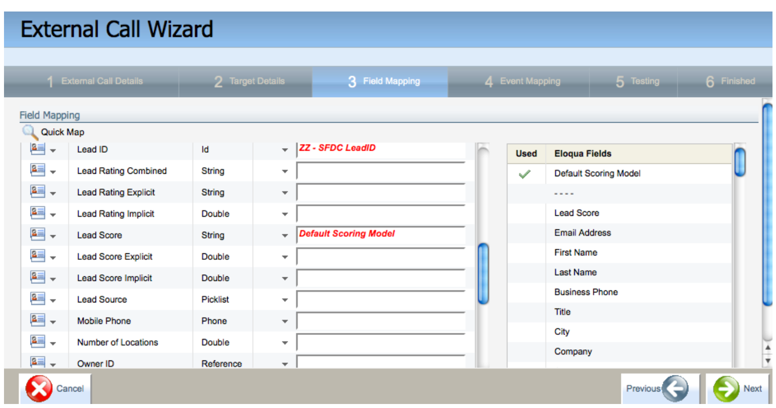


8. Proceed through the External Call Wizard.

   a. In Step 1 - Enter the External Call Name “Update Lead Score-Contacts”.

   b. In Step 2 - Under Target Details, select the Action “Update” and the Entity “Contact” (no selection needs to be made for the External Call Return Value).

   c. In Step 3 - Map the lead scoring model field* (from the right column) to the CRM Lead Score field (in the left column) and map the CRMContactID field in Eloqua to the CRM id field.

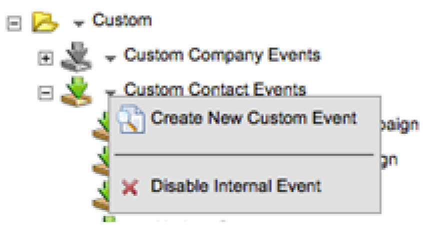


> **Note**: If you have setup multiple lead scoring models, then multiple system fields will appear above the dashed line on the right side.

d. In Step 4 - Ensure the External Call is mapped to the Internal Event.

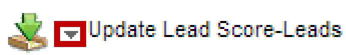
e. In Step 5 - Validate that both the Lead Scoring Field and CRMContactID appears under the Testing Data section.

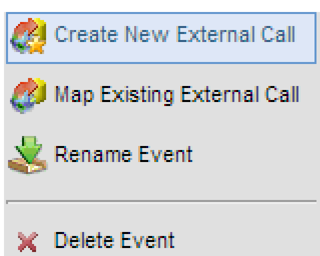
9. From the drop-down menu next to Custom Contact Events, select the option **Create New Custom Event**.



10. Enter the Custom Event Name “Update Lead Score-Leads”, then click **Save**.

11. From the drop-down menu next to the new Internal Event, select the option **Create New External Call**.



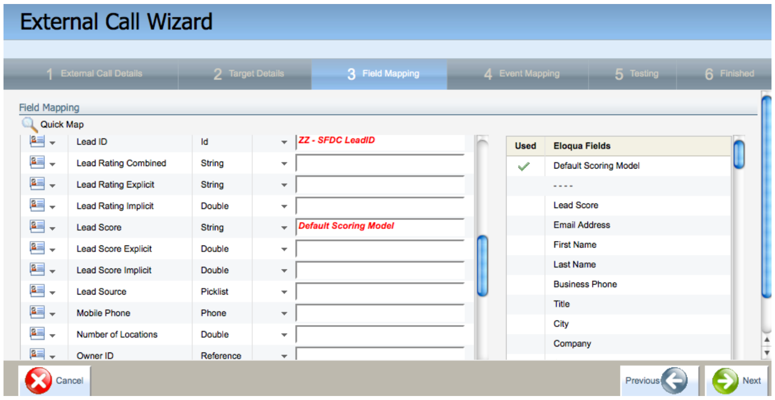


12. Proceed through the External Call Wizard.

a. In Step 1 - Enter the External Call Name “Update Lead Score-Leads”.

b. In Step 2 - Under Target Details, select the Action “Update” and the Entity “Lead” (no selection needs to be made for the External Call Return Value).

c. In Step 3 - Map the lead scoring model field (from the right column) to the CRM Lead Score field (in the left column) and map the CRMLeadID field in Eloqua to the CRM id field.



Note: If you have setup multiple lead scoring models, then multiple system fields will appear above the dashed line on the right side.

d. In Step 4 - Ensure the External Call is mapped to the Internal Event.

e. In Step 5 - Validate that both the Lead Scoring Field and CRM Lead ID appears under the Testing Data section.

3 Creating a new shared filter for lead scoring

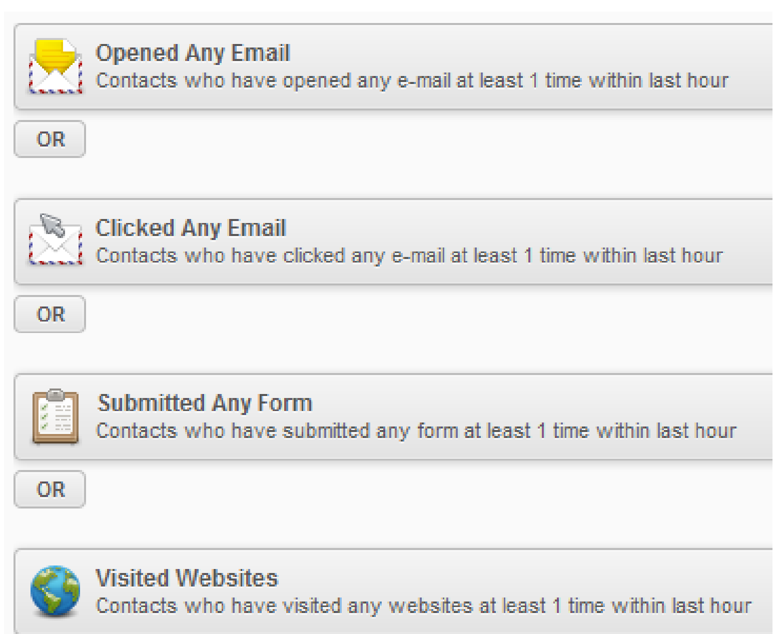
You must create and configure a shared filter for your lead scoring CRM integration.

To create a new shared filter:

1. Navigate to **Audience** > **Tools**, then click **Shared Filters**.

2. Click **New**.

3. Add Filter Criteria as shown below:



4. Share the Filter and name it “Lead Score Feeder”. (To share the filter, right click on the filter in the left and select ‘Share…’)

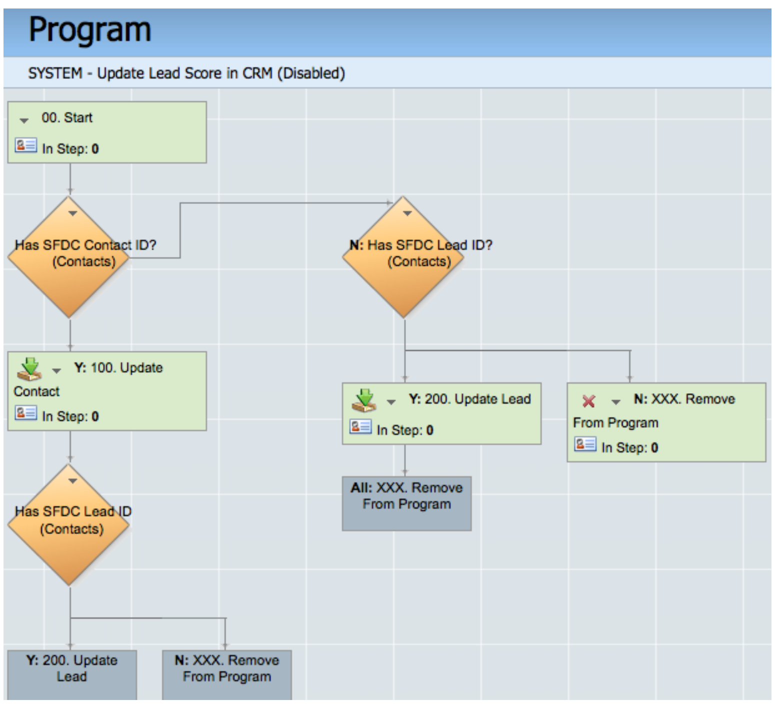
Note: The criteria “Contacts who have submitted any form at least 1 within last hour” is not required if you add contacts to your integration program via form processing step.

4 Configuring a program for lead scoring

A program must be created and configured that will perform updates of the Lead Score field in CRM.

To create a program:

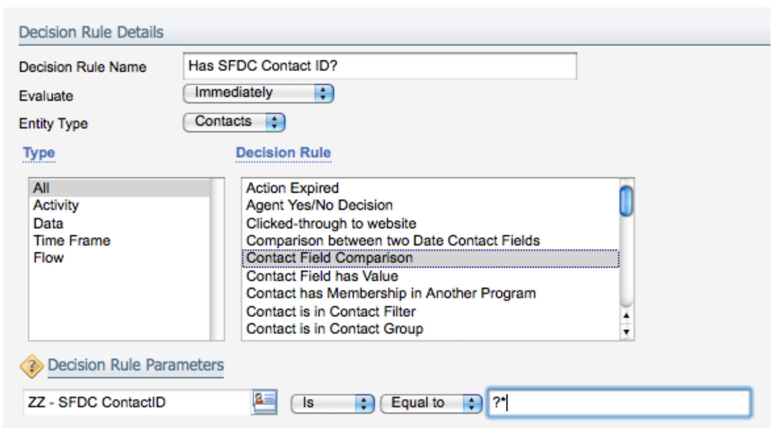
1. Navigate to **Orchestration** > **Tools**, then click **Program Builder**.
2. Create a new program (click ‘New Marketing Program from right pane).
3. Name the program “**SYSTEM - Update Lead Score in CRM**”.
4. Create the program flow.



Note: Depending on the order in which the decision rules are configured, your steps may appear different from this screenshot, ie. the greyed out boxes will be in different places. This is OK - verify that the flow of the program matches that in the screenshot above.

Note the following:

- In the Decision Rule "Has SFDC Contact ID ?" use a Contact Field Comparison with the decision rule parameters **SFDC ContactID is Equal to ?***.

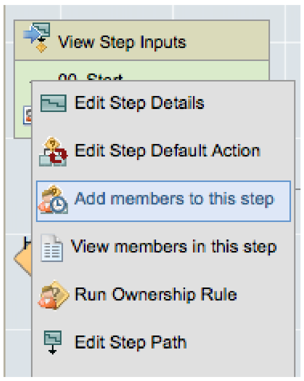


- In the Decision Rule "Has SFDC LeadID ?" use a Contact Field Comparison with the decision rule parameters **SFDC LeadID is Equal to ?***.
- In Step 100. Update Score on Contact, select the Integration Event created **Update Lead Score-Contacts**.
- In Step 200. Update Score on Lead, select the Integration Event **Update Lead Score-Leads.**

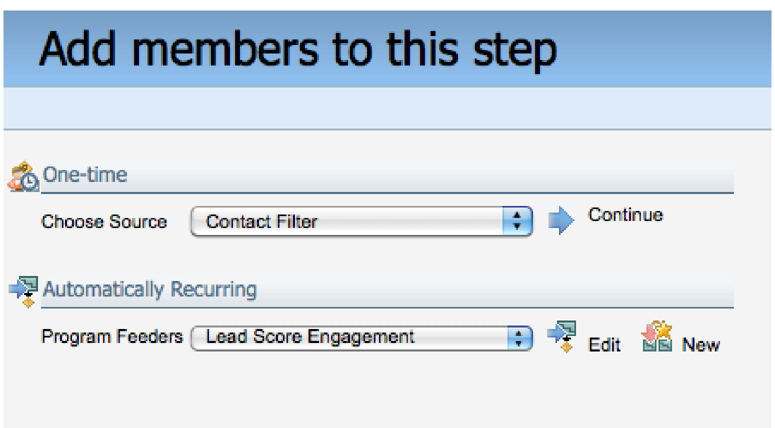
5 Configuring program feeder

To configure program feeder:

1. From the drop-down arrow next to the first step, select "Add members to this step".



2. Under the section "Automatically Recurring", select the "New" button.



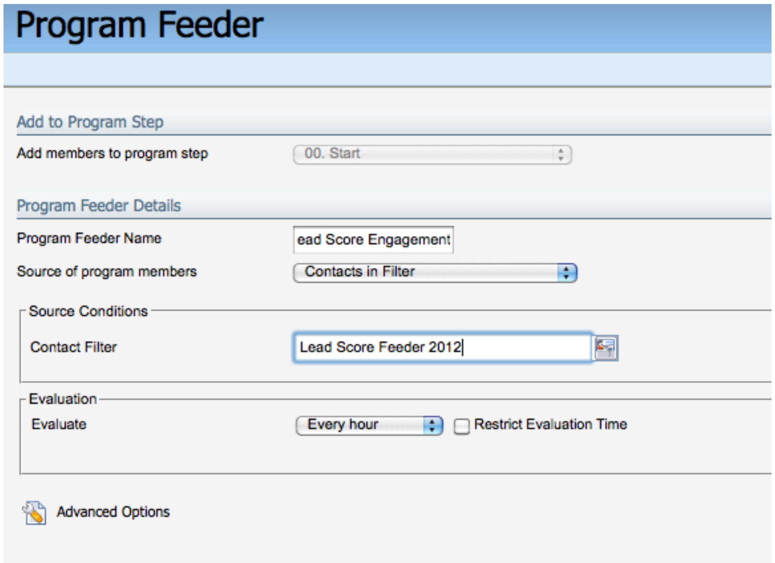
3. Configure the program feeder with the following parameters:

    a. Name the Program Feeder "Lead Score Engagement".

    b. Select the Shared Filter "Lead Score Feeder" created earlier.

    c. Set the Evaluation time to "Every Hour".

d. Click **Save and Close**.



4. Enable the program and feeder. We recommend the **Program Run Mode: Standard**.

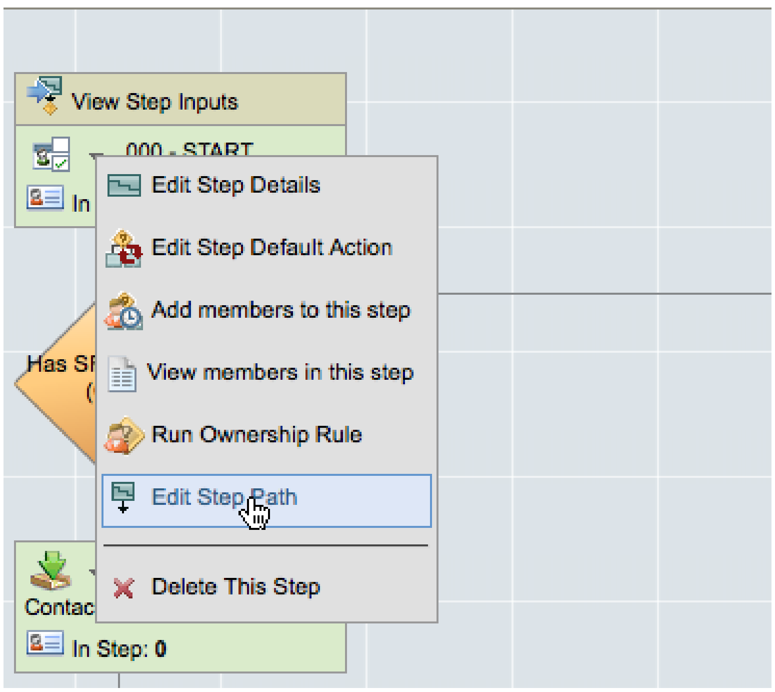
6 Adding exclusions

If you wish to restrict certain individuals (either competitors or individuals with a certain score) from flowing to CRM, then we recommend updating both your main integration program as well as the supporting CRM Lead Score update program created above.

To update the CRM update program:

1. Disable the program from the Program menu (in top right hand corner of your program).

2. From the drop-down arrow next to the first step, select “Edit Step Path”.

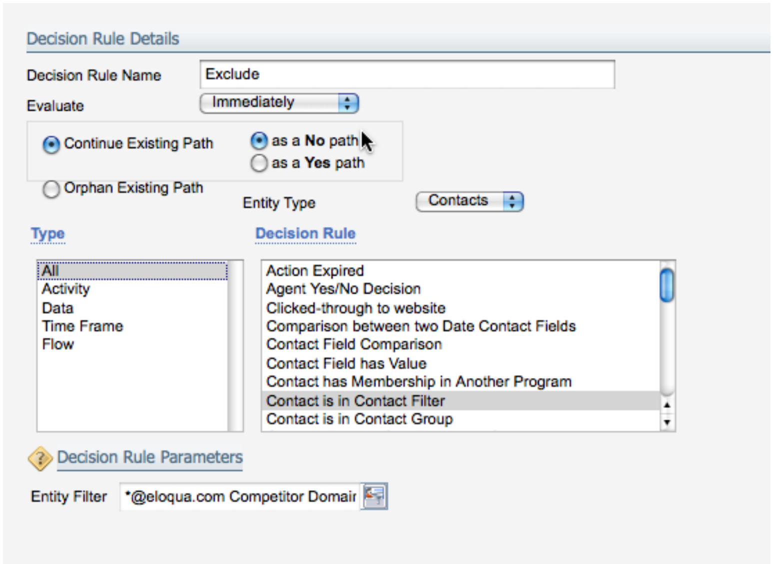


3. Select “Send to a new decision rule” and click Continue.

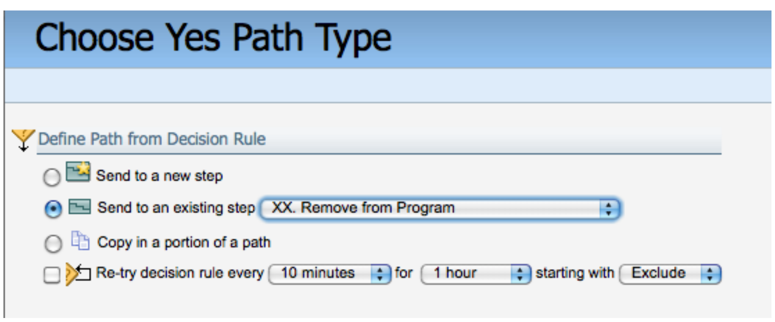
4. Select the Decision Rule criteria “Contact is in Contact Filter”.

5. Under Decision Rule Parameters, select the Entity Filter that contains your restriction criteria. Note - this assumes you are using a shared contact filter to manage exclusion. Click **Save and**

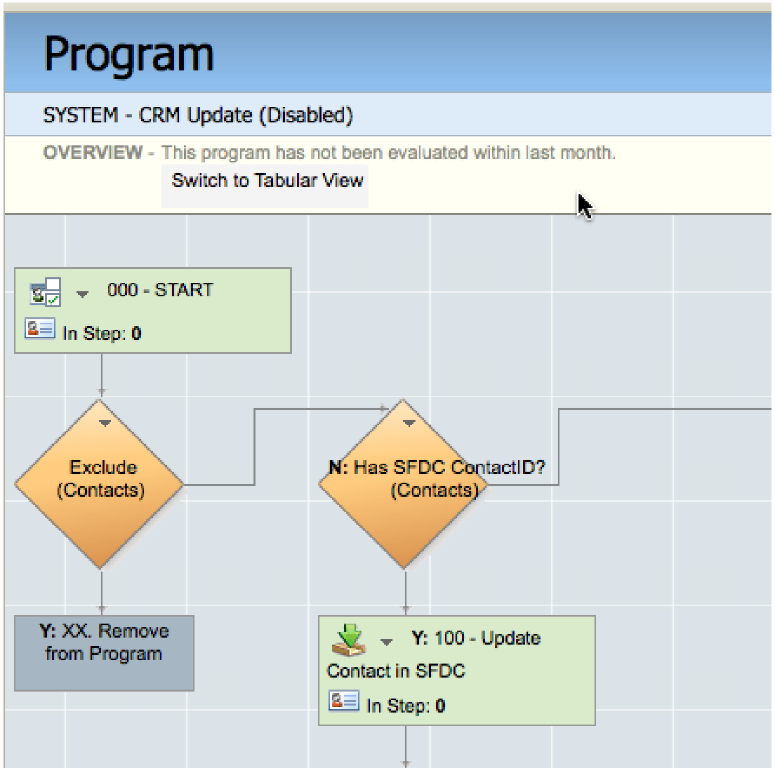
Close.



6. Right click on the new decision rule, and select "Edit Decision Yes Path". In the pop-up window, select the path type "Send to an existing step" and select the program "Remove From Program".



When you are done, your program should look like this:



7. Enable the program from the program menu in the top right hand corner.

8. Repeat for the supporting Lead Scoring Update program created earlier.