Oracle Eloqua Campaigns

User Guide

Contents

1 Campaigns

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. Simply choose your segment, email, and when to send the email and you're good to go! 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. Have a look at some of our best practice templates for some inspiration. This Topliners post offers advice on key programs to build, how to evolve your strategies, and offers some best practices advice.

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!

2 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. Find tips and resources about creating great campaigns from the DIY Marketing Success group on Topliners. 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. Click **Create a Multi-Step Campaign**.

3. Select a template or use the blank campaign. The campaign canvas opens.
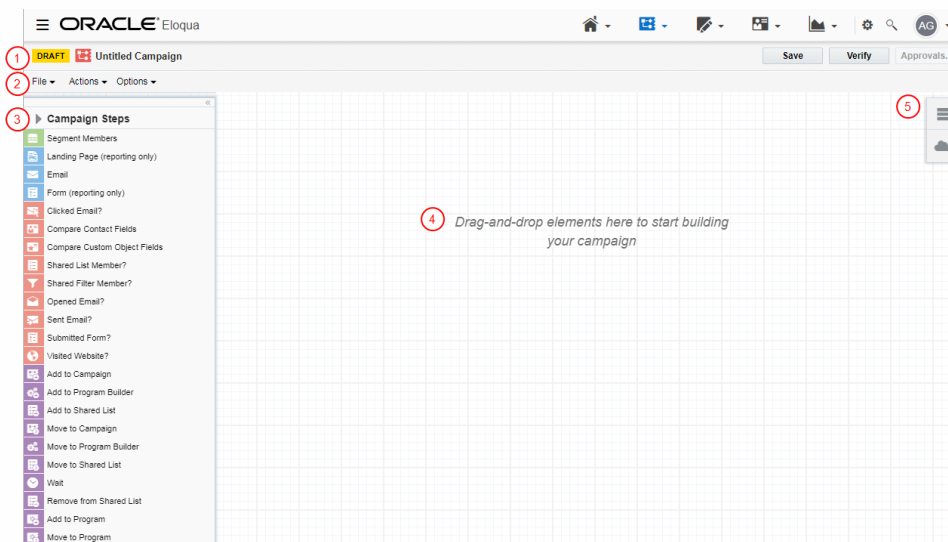
① Campaign name and state

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.
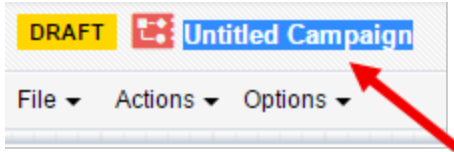
5. Configure the settings for your campaign.

    a. Click **Options**, then click **Campaign Settings**.

    b. Add a description of the campaign and set when the campaign will start and end.
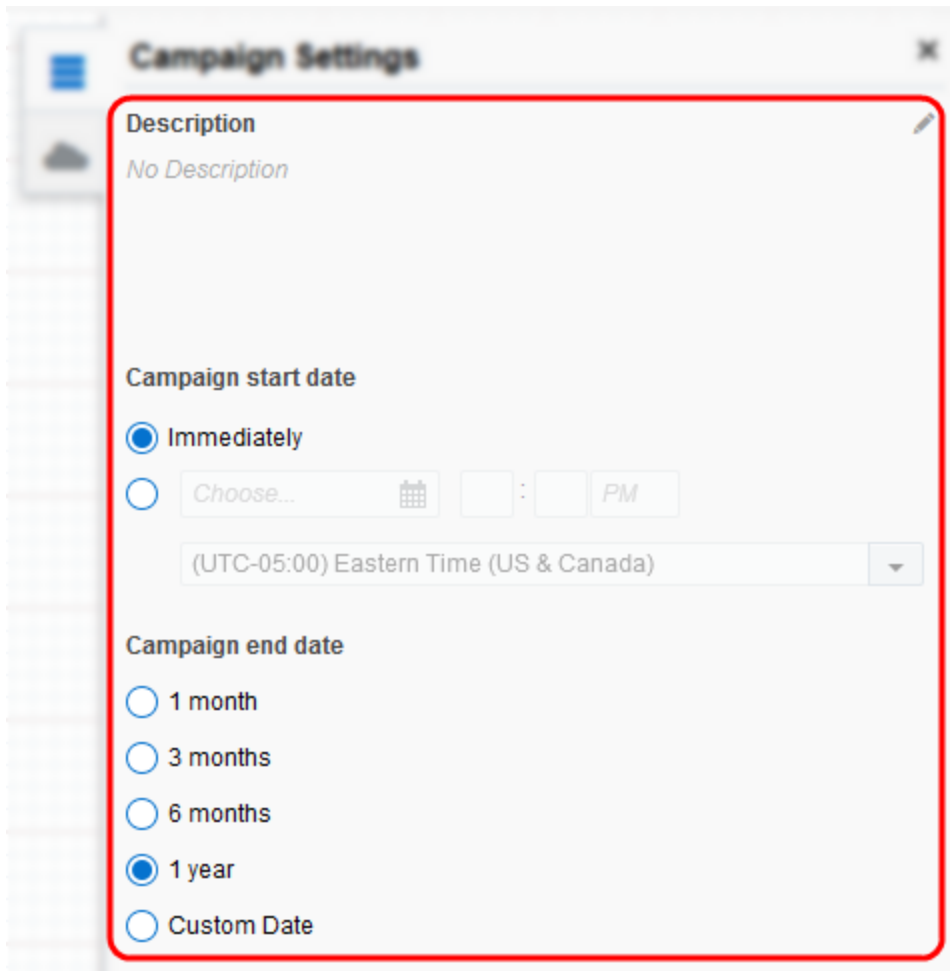
    c. Click **Advanced** and configure additional details:

- 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.

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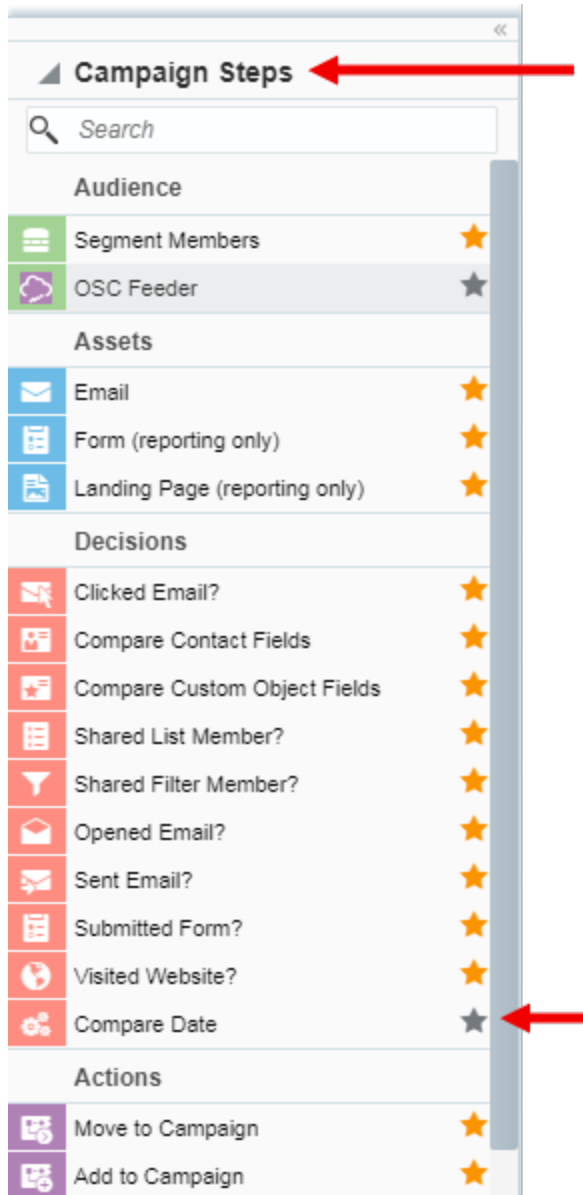
Tip: You can copy and paste groups of steps by highlighting them with your cursor and using your default keyboard shortcuts (for example, Ctrl+C to copy and Ctrl+V to paste).

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.

3 Creating simple email campaigns

If you want to send a single email to a group of contacts, you can create a simple email campaign. The *Simple Email Campaign Wizard* 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.
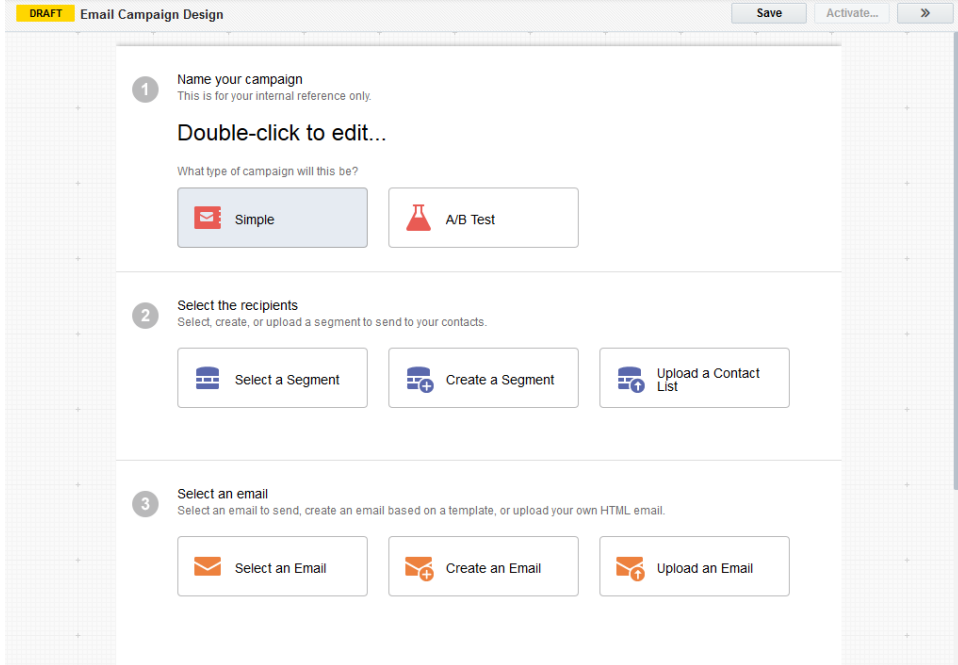
Learn more by watching the video!

> 💡 **Note**: The approvals workflow is not available for simple email and A/B test campaigns.
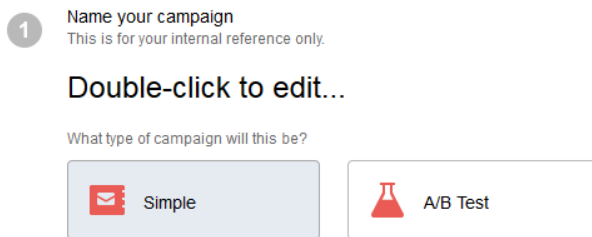
To create a simple email campaign:

1. Navigate to **Orchestration** ⊞, then click **Campaigns**.

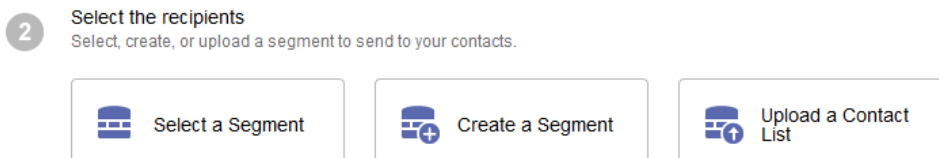2. Click **Create a Simple Email Campaign**.

   The simple campaign design wizard opens.

3. Complete **Step 1** of the design wizard, giving your campaign a name and ensuring that you select **Simple**.

4. Specify the segment to include in the campaign by configuring **Step 2** of the design wizard. You can create a new segment or upload a new one.

After you add a segment, the number of contacts included in the segment displays. To refresh the contacts, click ⟳.

> 👍 **Tip**: As you configure the wizard, Oracle Eloqua validates your configuration. Steps that have errors appear with a caution symbol ⚠️. Click the caution symbol to view the error details.

5. Specify the email to use in the campaign by configuring **Step 3** of the design wizard.

6. Specify when to launch the campaign by configuring **Step 4** of the design wizard:

- To start the campaign immediately after you active it, click **Send right now**. Use the advanced options to restrict the time of day that the email is sent.

- To start the campaign on a specific date and time, click **Schedule for a later time**, then specify the date and time to start the campaign.

7. Click **Advanced Sending Options** to configure other email options.

- **Use a Signature**: Add a signature to your email. For more information on signature rules, see Signature rules.

- **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**: Specify 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.

- **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.

8. If you want to configure campaign fields, click **Actions** [»] , then click **Settings**. 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.

> 💡 **Note**: The setting *Allow contacts to enter the campaign more than once* does not apply to an simple email campaign since you are only sending the email one time.

9. Click **Save**.

10. Click **Activate Campaign**.

> 💡 **Note**: You must resolve all errors before you can active 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.

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 details about contacts included or excluded from the email, click **View Participants**. Oracle Eloqua continues to track all activity for the email campaign for 12 months after the campaign started. For more information about the email performance metrics, see Campaign reporting and metrics.
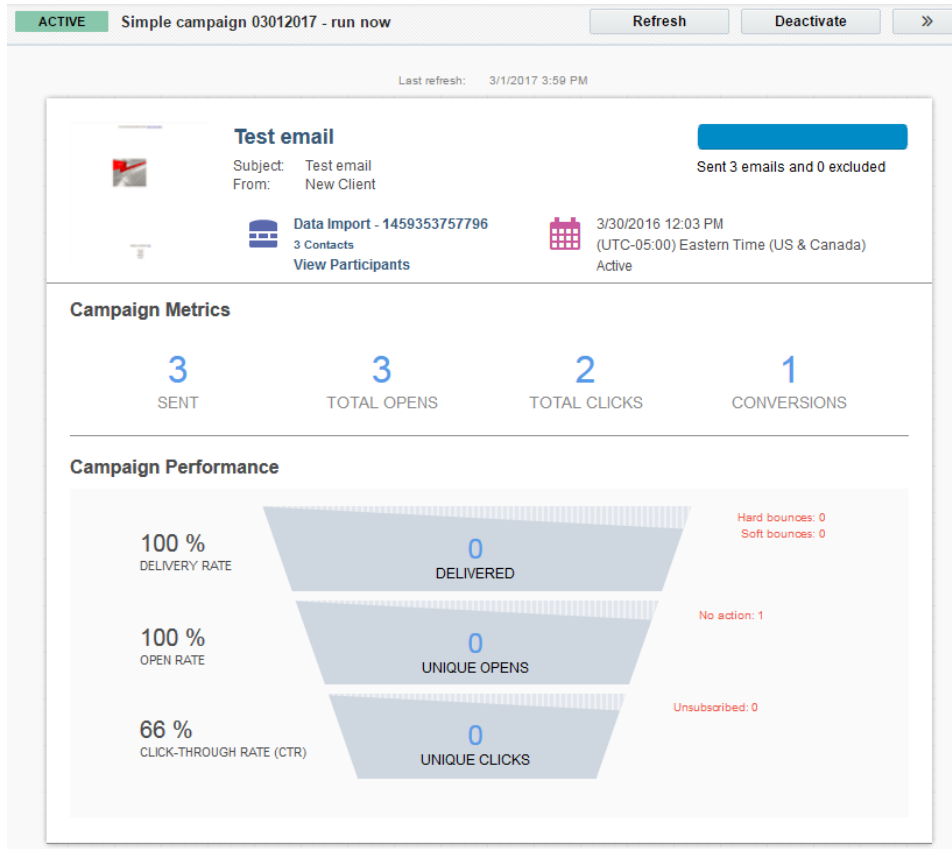
3.1 Changing an active simple email campaign

After the campaign is ACTIVE or SCHEDULED, you cannot change the campaign. If you need to make changes, you must first deactivate or unschedule 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.

However, 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.

4 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.

> 👍 **Important**: Oracle Eloqua provides you with a workflow to A/B test emails. If you want to A/B test a multi-step campaign, check out the posts on Topliners to see how others have done this.

4.1 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. The A/B Test Planner can help you capture your plans.

- 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.

- You cannot change an A/B test after it has started. Have a look at this information on changing an active A/B test.

4.2 Creating an A/B testing campaign

Using the *Simple Email Campaign Wizard*, you can create an A/B test to send two test emails to a part of a segment.

To create an A/B testing campaign:

1. Navigate to **Orchestration** ⊞, then click **Campaigns**.

2. Click **Create a Simple Email Campaign**.

   The simple email campaign design wizard opens.
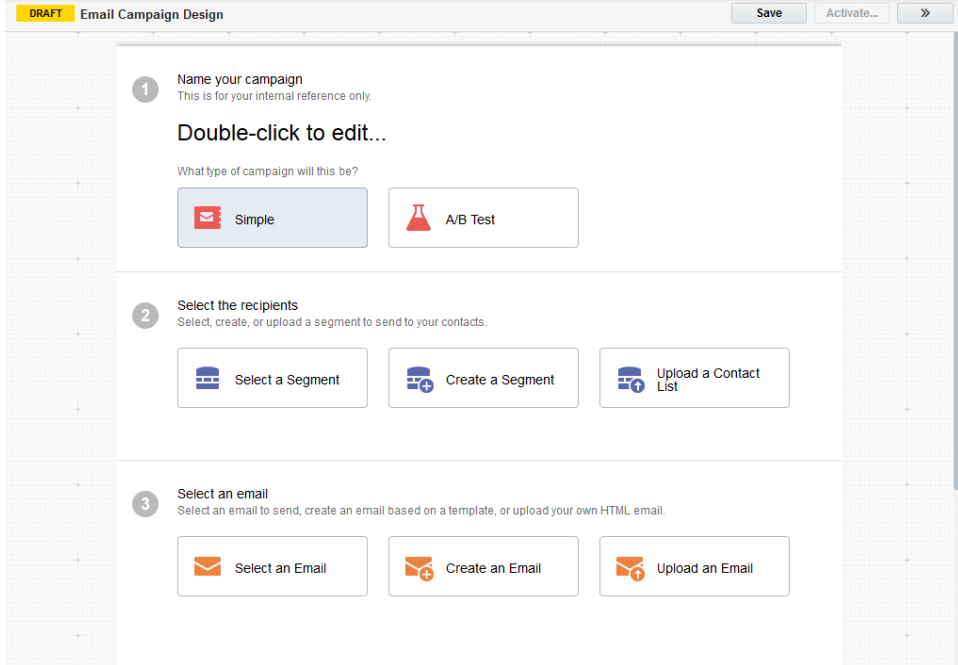
3. Complete **Step 1** of the design wizard, giving the A/B test a name and ensuring you select **A/B Test**.
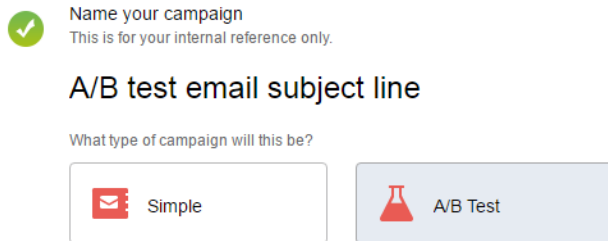
4. Specify the segment to include in the testing by configuring **Step 2** of the design wizard. Later you will indicate what percentage of the segment to include in the testing. You can create a new segment or upload a new one.

After you add a segment, the number of contacts included in the segment displays. To refresh the contacts, click [icon].

> 👍 **Tip**: As you configure the wizard, Oracle Eloqua validates your configuration. Steps that have errors appear with a caution symbol ⚠️. Click the caution symbol to view the error details.

5. Specify the emails to use in the test by configuring **Step 3** of the design wizard.

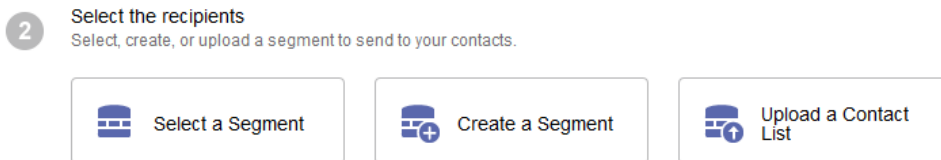6. Specify the size of your test audience and the metric (such as total opens or total clicks) that determines the winning email by configuring **Step 4** of the design wizard:

   - To configure the percentage of the segment that you want to participate in the A/B test, drag the slider. In the following example, 50% of the segment will participate - 25% of that 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**. Later you can configure whether you want to automatically send the winning email to the rest of the segment.

- To automatically send the winning email to the remaining contacts when the A/B test ends, select **Automatically send the winning version**. Oracle Eloqua determines the winner using the winning metric you selected earlier. Otherwise, Oracle Eloqua will send you a notification with the results of the A/B test and you can return to the testing campaign to choose a winner.

> 💡 **Note**: In the event of a tie, Oracle Eloqua sends an email and you must manually select a winner.

7. 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. If you selected the *Automatically send the winning version* option, the winning email will be sent out after this testing time ends.

8. Specify when to launch the A/B testing campaign by configuring **Step 5** of the design wizard:

Email delivery
Select when you would like this email to launch.

Send right now

Schedule for a later time

▸ *Advanced Sending Options*

- To start the campaign immediately after you active it, click **Send right now**.

- To start the campaign on a specific date and time, click **Schedule for a later time** and then specify the date and time to start the campaign.

9. Click **Advanced Sending Options** to configure additional settings:

Advanced Sending Options

☐ Use a Signature
  ○ Send using a dynamic signature rule
    Type here...
  ○ Send on behalf of a single user
    Type here...
☑ Include List-Unsubscribe header
☐ Break send into smaller batches   Send over [   ] hours
☐ Only send during certain days and hours   Between 12 : 00 AM and 12 : 00 AM
                                             On: Sun Mon Tue Wed Thu Fri Sat
☐ Allow emails to be re-sent to past recipients

- **Use a Signature**: Add a signature to your email. For more information on signature rules, see Signature rules.

- **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**: Specify 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.

- **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.

10. If you want to configure additional campaign fields, click **Actions** ⟫ , then click **Settings**. 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.

> 💡 Note: The setting *Allow contacts to enter the campaign more than once* does not apply to an A/B test since you are only sending the email one time.

11. Click **Save**.

12. Click **Activate Campaign**. The campaign launches according to the email delivery settings you specified.

> 💡 Note: You must resolve all errors before you can active the campaign.

Oracle Eloqua sends the emails or sends them 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.

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 details about contacts included or excluded from the emails, click **View Participants**.

You can return to the campaign after the testing completes to manually choose the winning email. If you automatically sent the winning email to the remaining segment, you can monitor the performance of the winning email. See About the results of an A/B test for more information.

4.3 Changing an active A/B test

After the A/B test is ACTIVE or SCHEDULED, you cannot change it.Here is some information to take into consideration if you need to make changes:

- A SCHEDULED testing campaign can only be changed after it is unscheduled.

- An ACTIVE testing campaign cannot be deactivated. If you want to stop sending the test emails, you must cancel the campaign. You could then copy the testing campaign and make the changes required. Use the *Allow emails to be re-sent to past recipients* setting to ensure contacts are not re-sent the same email.

4.4 About the results of an A/B test

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

- To view the most recent information, click **Refresh** at the top of the window.

- To view details about contacts included or excluded from the test, click the **View Participants** links.

- To view the performance metrics for the emails, select a metric from the **View** drop-down list.

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

> **ⓘ Important**: The metrics from the losing email can be viewed by expanding the *Details* section.
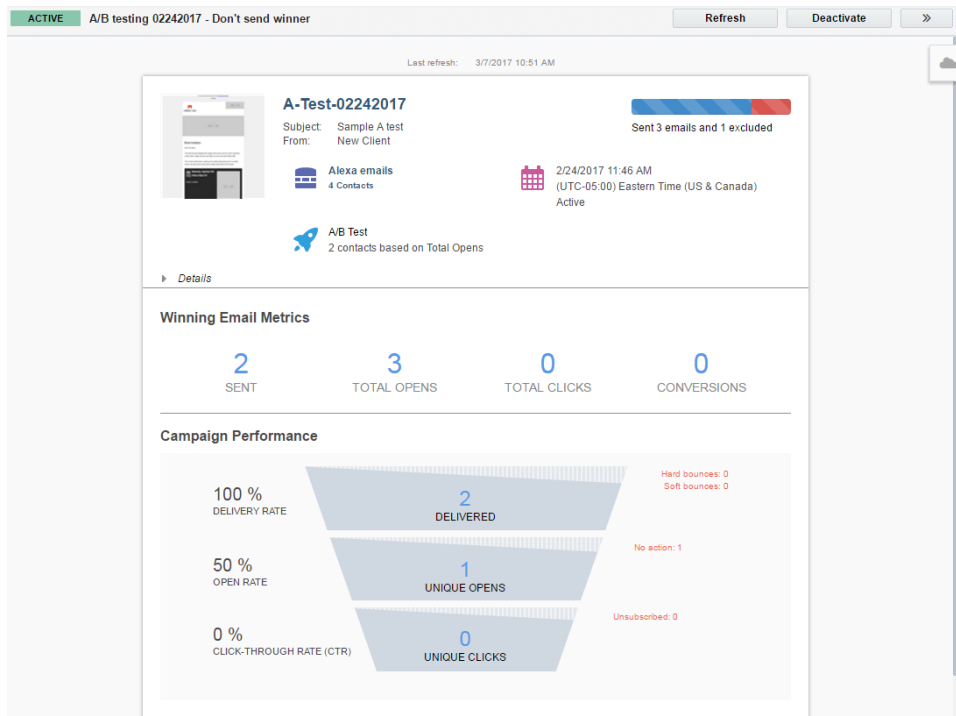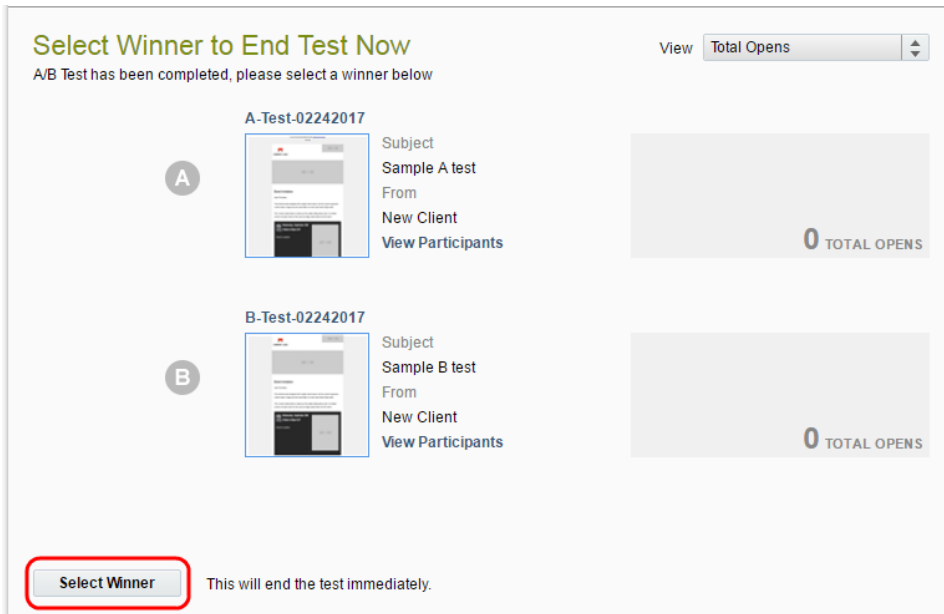
4.5 Manually choosing the winning email of an A/B testing campaign

If you did not choose to automatically send the wining 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.

To select the winning email:

1. Navigate to **Orchestration** ⊞, then click **Campaigns**.

2. Open the A/B testing campaign.

3. Click **Select Winner** at the bottom of the window.

4. Choose the winning email and then click **End Test**.

5 Setting up campaign notifications

The following campaign notifications are available in Oracle Eloqua:

- Wait step notifications

- Campaign end date notifications

5.1 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.

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.

5.2 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**.

Campaign Fields

General   Financials   Custom Fields   **Notifications**

ⓘ 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.

add a user...

Send campaign completion notification:

2 business days before   ▾

Cancel   **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.
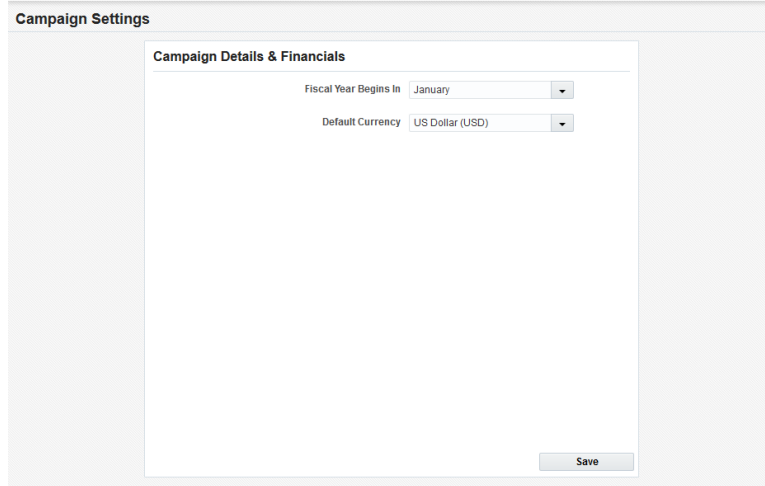
6 Configuring campaign details and financials

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.

   Campaign Settings

   Campaign Details & Financials

Fiscal Year Begins In	January ▾
Default Currency	US Dollar (USD) ▾

   Save

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.

7 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.

> 💡 **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 your user profile, 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. After this 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.

7.1 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:
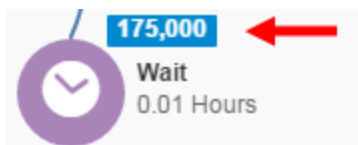
- Removes the campaign members that were being held

- 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*

8 Manually moving contacts through a program or campaign

In most cases, once you've set up your program or 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 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.

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**.

9 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.
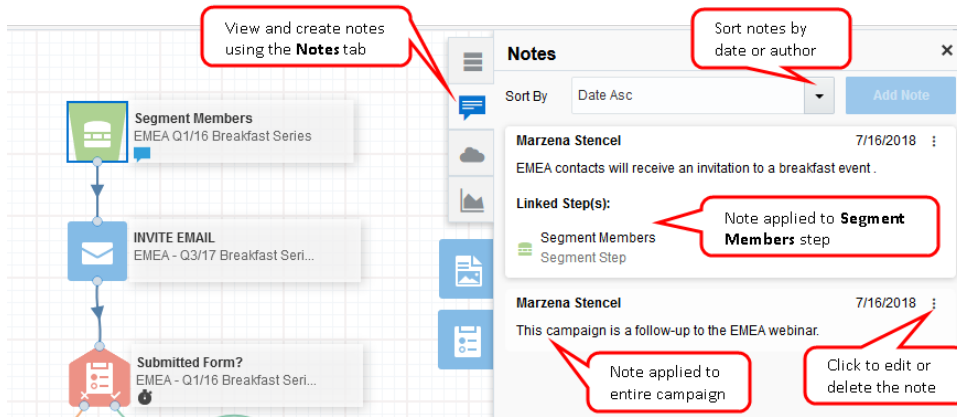
To add a note to a campaign or program:

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** [icon], then click **Add Note**.

   - To add a note to a singe 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.

10 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. Right-click the campaign in the search results and select **Copy**.

Name	Status ▲	Type
✉ Sample A/B testing v2	Active	Email Marketing
✉ A/B testing v3		mail Marketing
✉ A/B Testing 02242017 - Send w		mail Marketing
✉ A/B testing 02242017 - Don't se		mail Marketing
🔲 GSG sample campaign : Copy		ontact

Menu overlay:
- Copy
- Rename
- Open...
- Move To Folder
- New Folder

The copied campaign appears with the word *Copy* appended to the name. The copied campaign has a DRAFT status.

Name		Status	Type
✉ Sample A/B testing v2 : Copy	▼	Draft	Email Marketing
✉ Sample A/B testing v2		Active	Email Marketing

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

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

11 Creating 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.

After you create a template, users can access the template from the *All Files* view of the *Template Chooser* window.
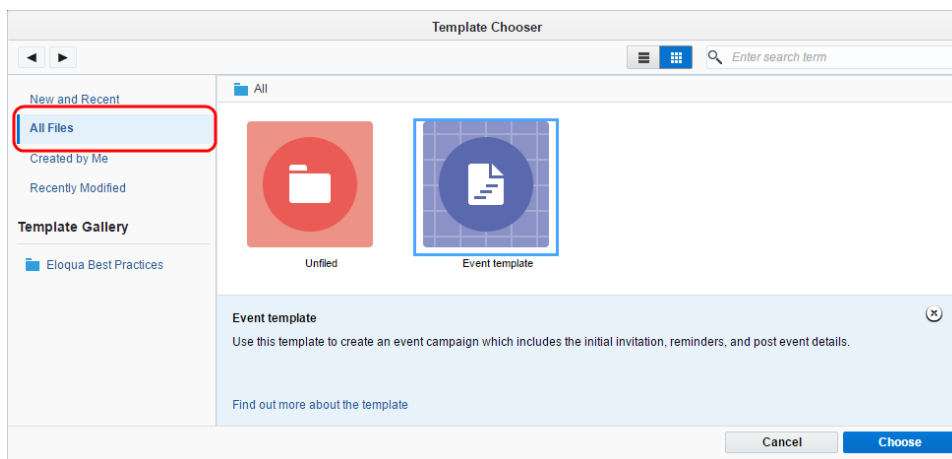
👍 **Tip**: Oracle Eloqua provides you with Best Practices templates that are available from the *Template Gallery* of the *Template Choose* window.

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.

> ℹ️ **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**.

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.

11.1 Deleting a template

To delete a template:

1. Navigate to **Orchestration** ⊞, then click **Campaigns**.

2. Click **Create a multi-step campaign**.

3. In the **Template Chooser** window, right-click the template and click **Delete**.
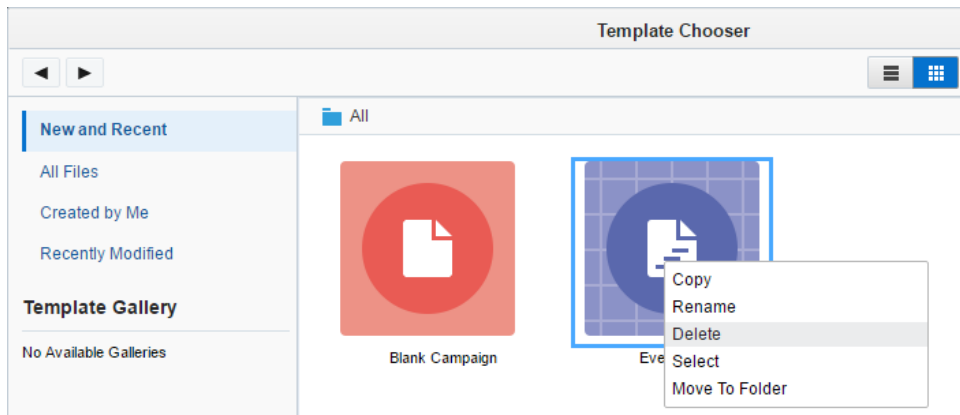
12 Deleting campaigns

Before you begin:

- You must resolve all dependencies before you can delete a campaign. When you try to delete a campaign with dependencies, Oracle Eloqua displays them for you so that you can resolve them.

- You cannot delete ACTIVE or SCHEDULED campaigns. If you want to delete a campaign in one of these states, deactivate the campaign first.

To delete a campaign:

1. Navigate to **Orchestration** ⊞, then click **Campaigns**.

2. Search for the campaign you want to delete.

3. Right-click the campaign in the search results and click **Delete**.
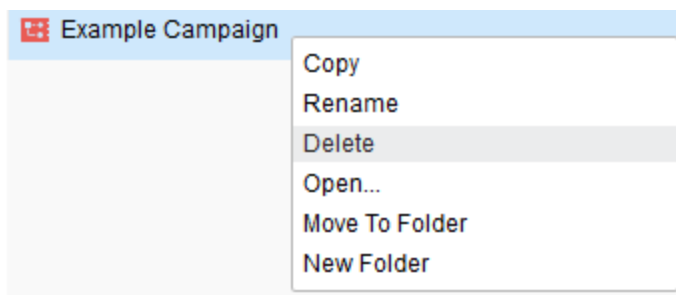
13 Campaign canvas elements

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://cloud.oracle.com/marketplace). These apps enable you to integrate your campaign with other systems like WebEx or GoToWebinar.

13.1 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.
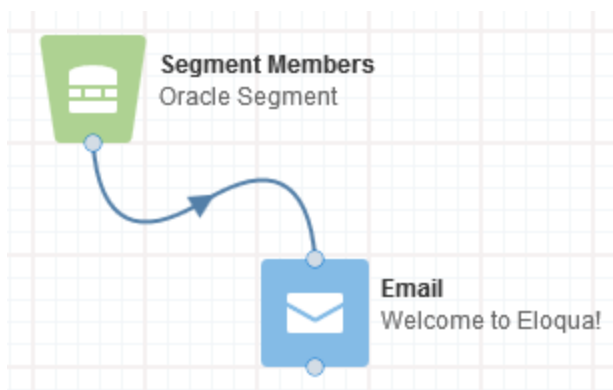
Example 2: Setting up a simple campaign with a landing page

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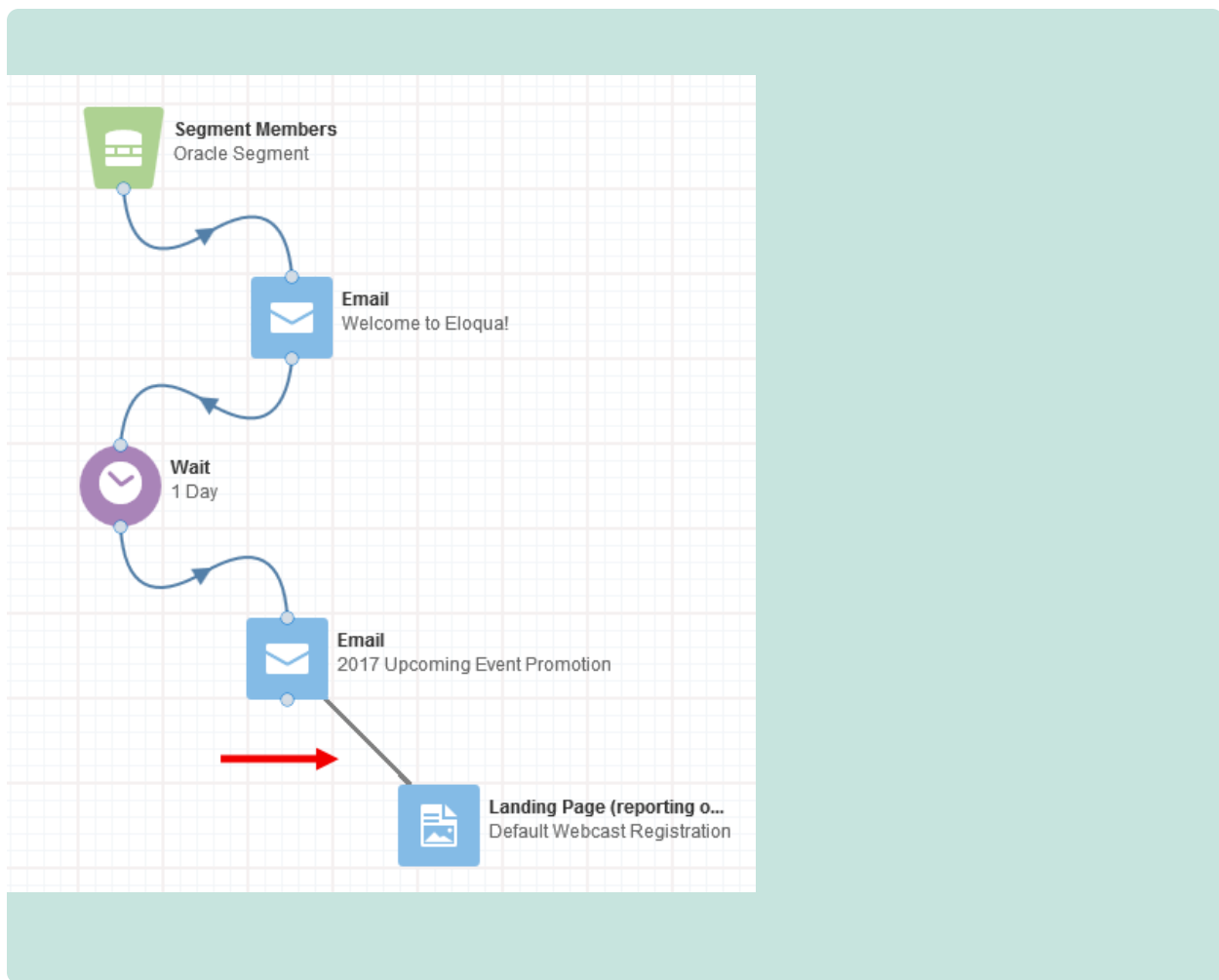
Example 3: Testing for a click-through on a link

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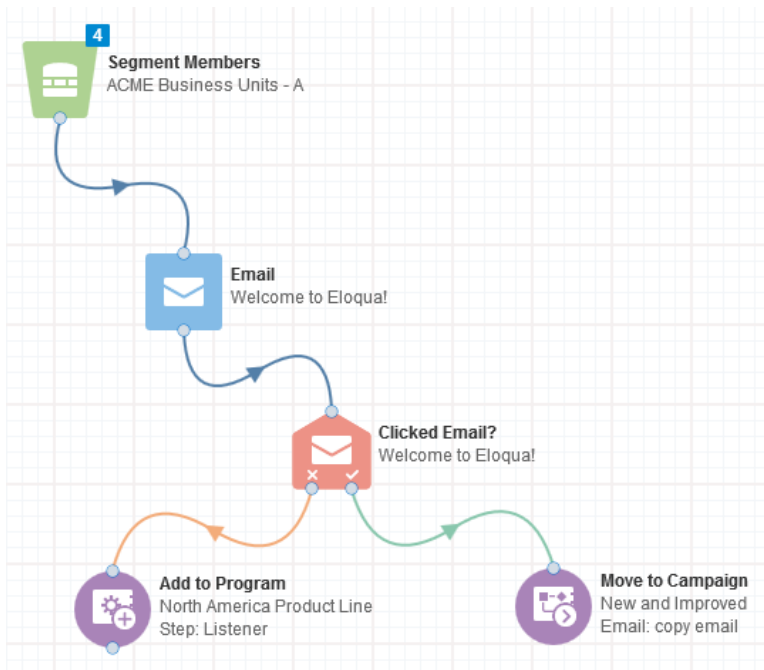
Note: The number of clicks, when the clickthrough occurred, and the duration of the evaluation window going forward are included in the *Clicked Email?* element.

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.
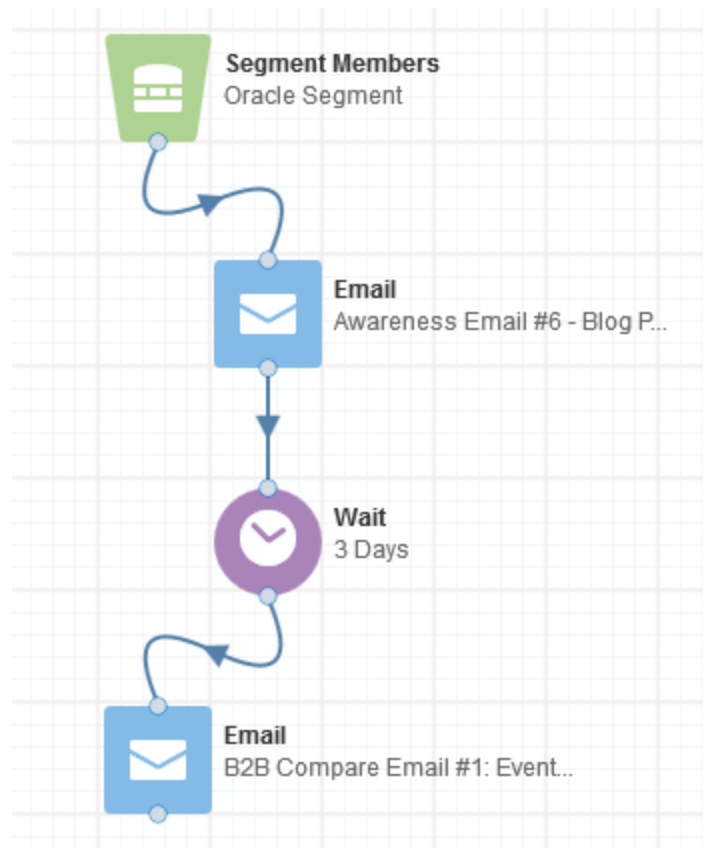
13.2 Configuring campaign canvas elements: Audience

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.

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. If you use this option, the element appears green on the canvas .

> ❶ **Important**: Avoid evaluating the segment hourly. This can overload the Asynchronous Commands queue. Evaluate the segment instead every 12 or 24 hours.

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.
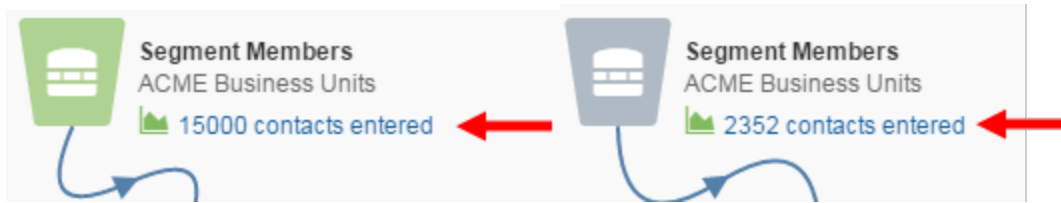
Cloud Feeder

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.

13.3 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](#)

- [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.

   - **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 list-unsubscribe header to your email.

     - **Send email to master exclude members**: This option sends the email to users 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 users, this ensures that unsubscribed members do not miss out on critical non-marketing emails, such as product information.

- **Scheduling**: 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.

- **Routing**: Enable the check box if you want to automatically route contacts excluded from the email 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.
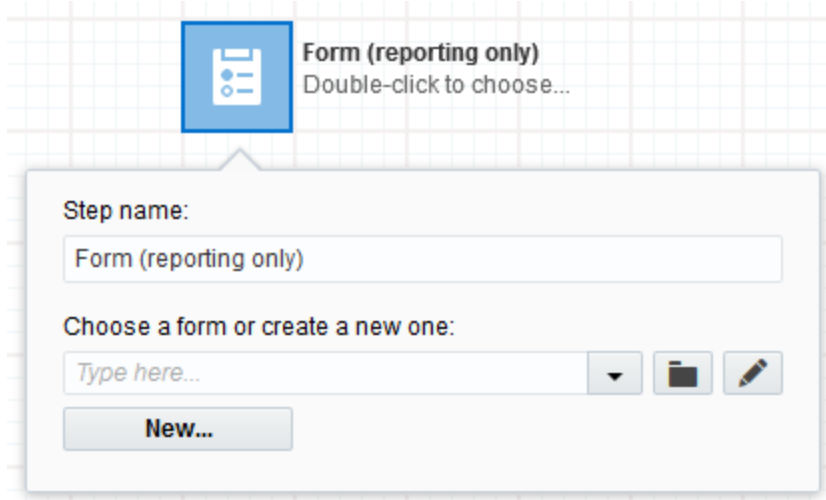
To configure the Form asset:

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.
>
> Landing Page (reporting o...
> ExampleLP
>
> Form (reporting only)
> Sample Form
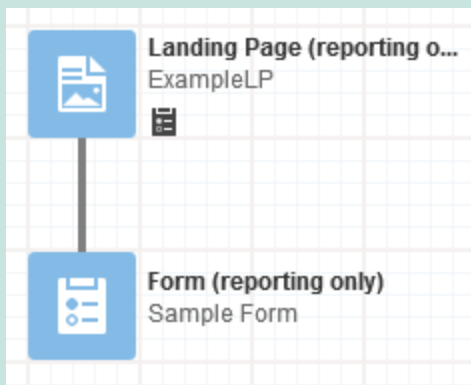
To configure the Landing Page asset:
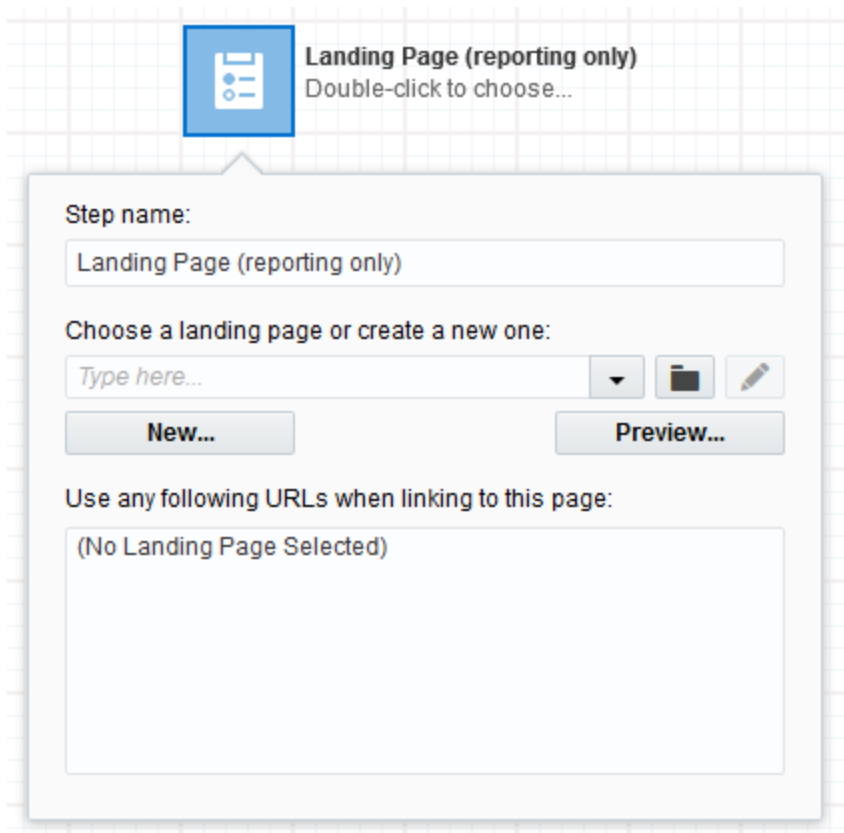
1. Type a new name into the *Step name* field.

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**.

13.4 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.

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

-

Clicked Email?

Route contacts depending on whether they clicked through on any link in a selected email.
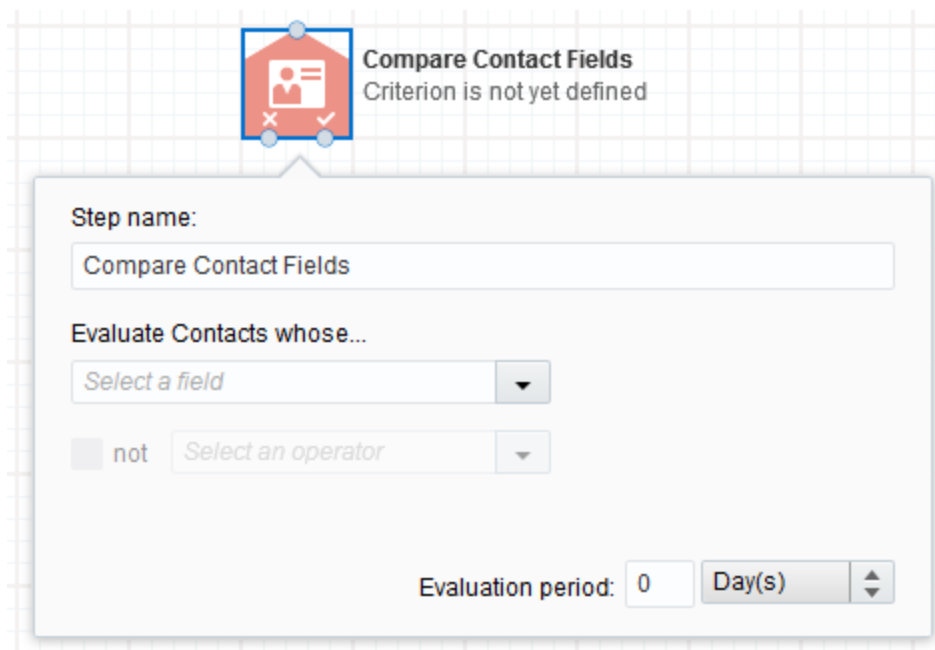
To configure the Clicked Email element:

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.
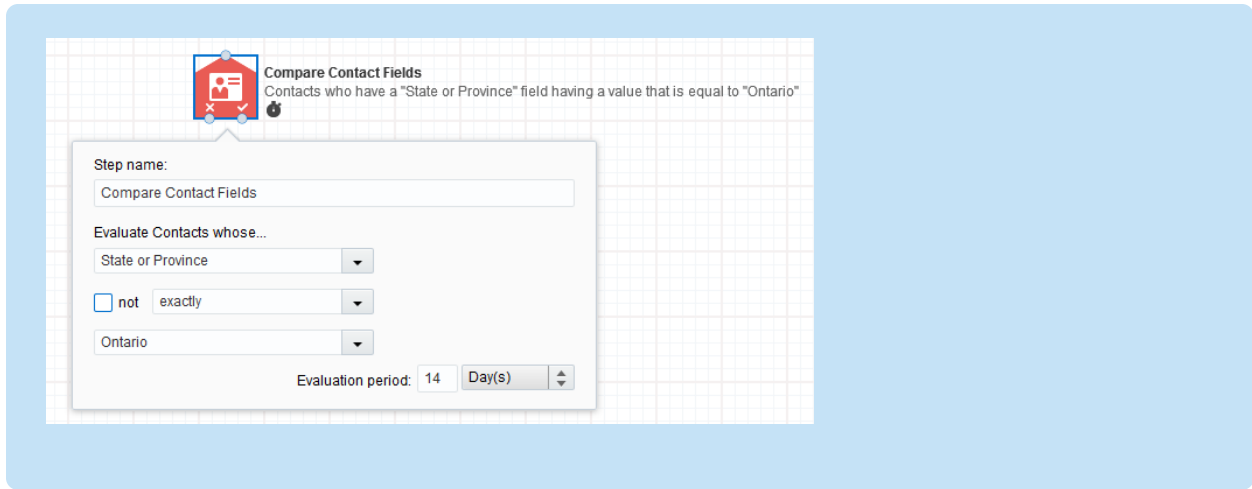

To configure the Compare Contact Fields element:

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.
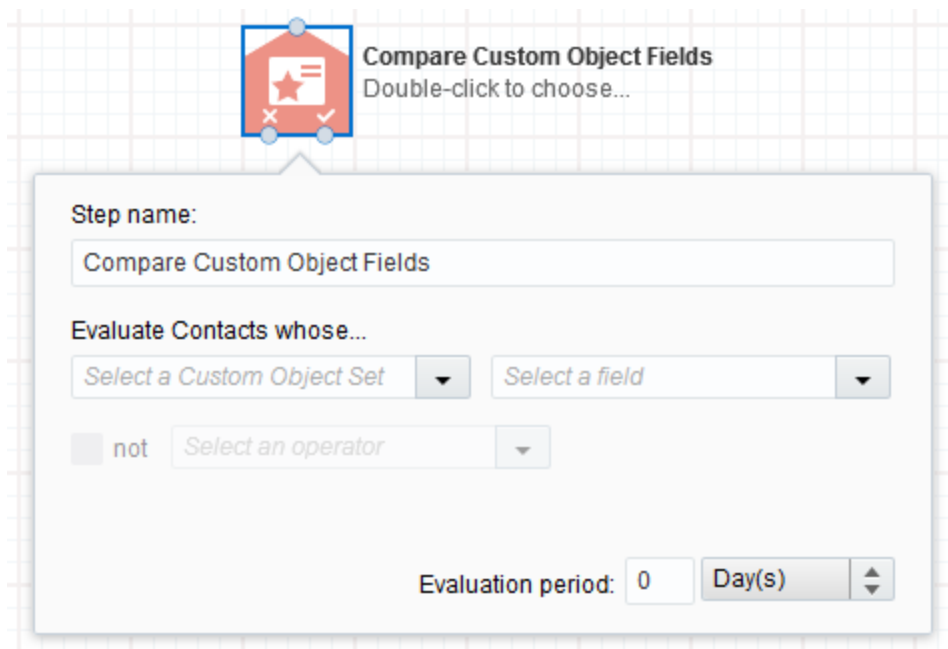
To configure the Compare Custom Object Fields element:

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.

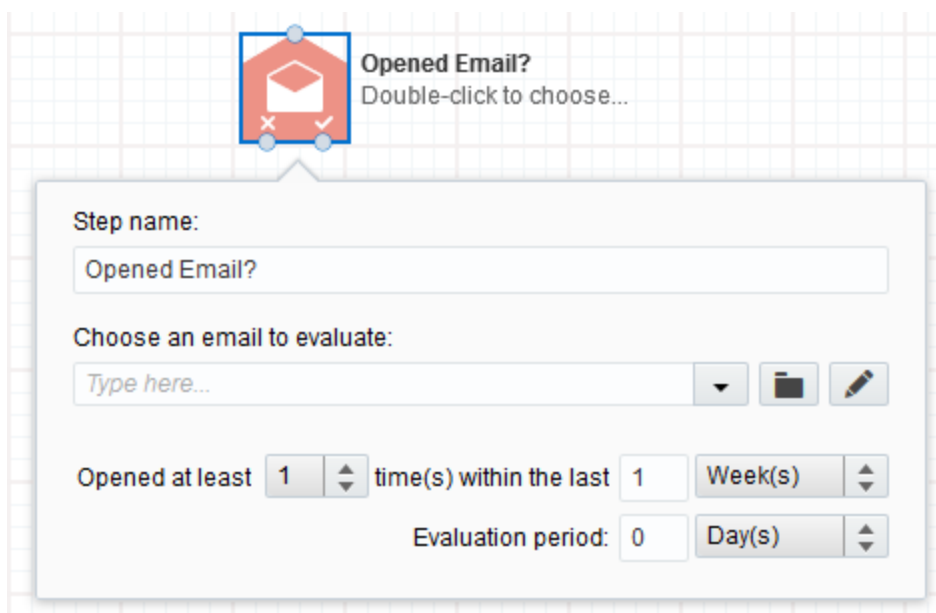**To configure the Shared List Member? element:**

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.

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.
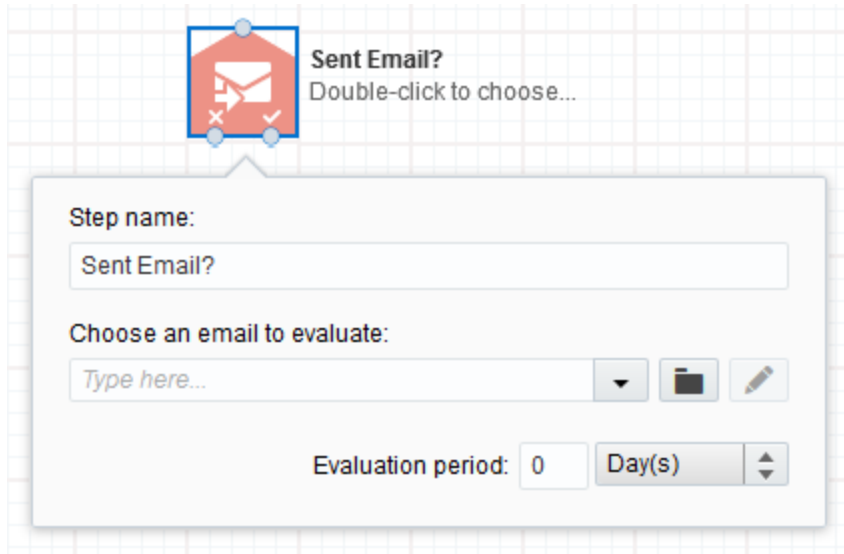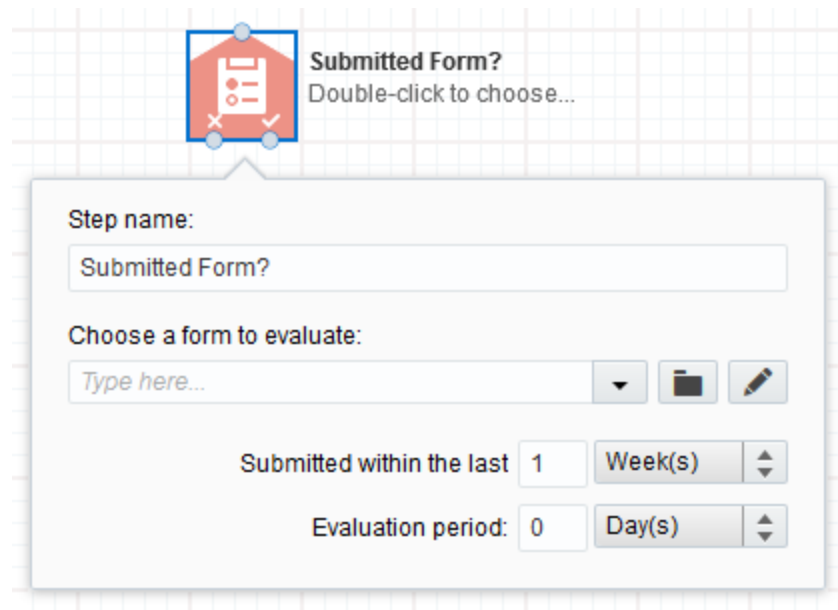
To configure the Sent Email? element:

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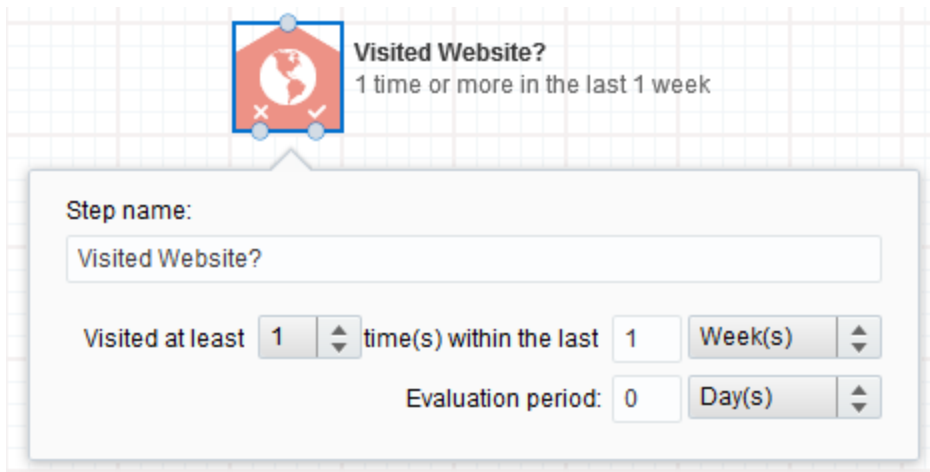
> 📖 **Example**: If you set the value as 1 week, Oracle Eloqua would route segment members that submitted a form during the past week separately from those that did not.

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.
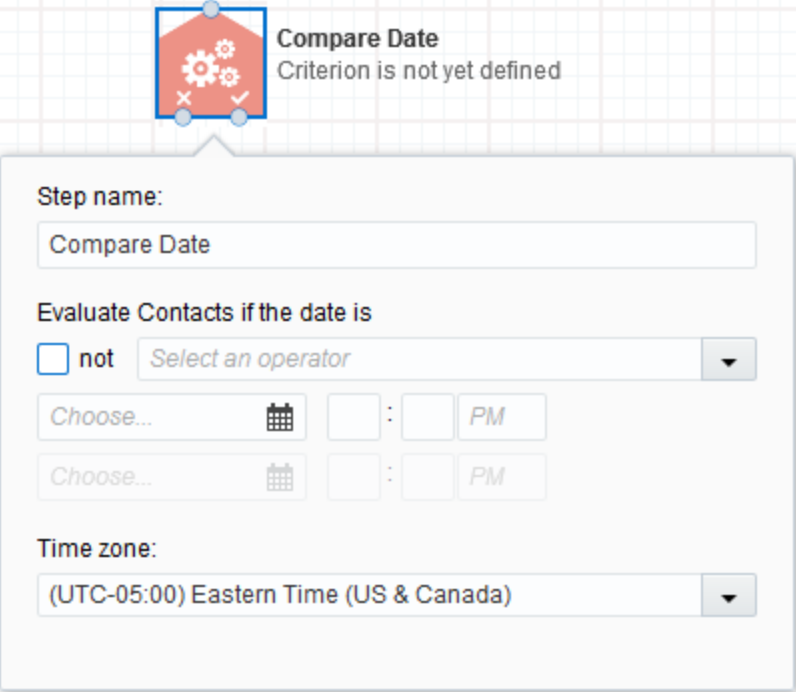
To configure the Visited Website? element:

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.

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.

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. You 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.

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.

13.5 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.
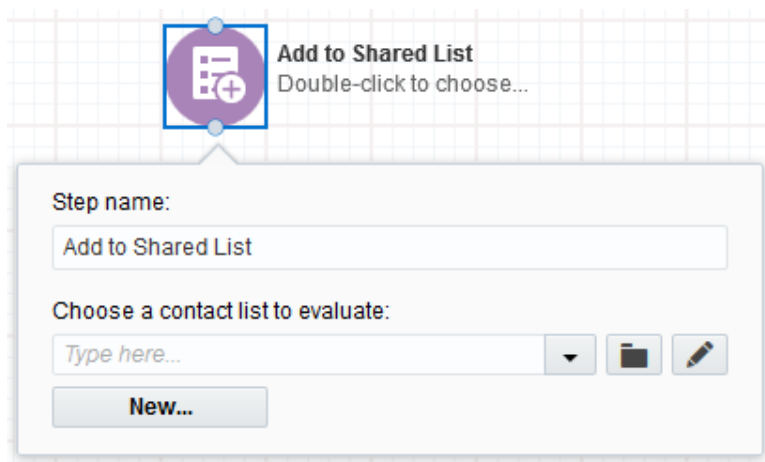
To configure the Add to Campaign element:
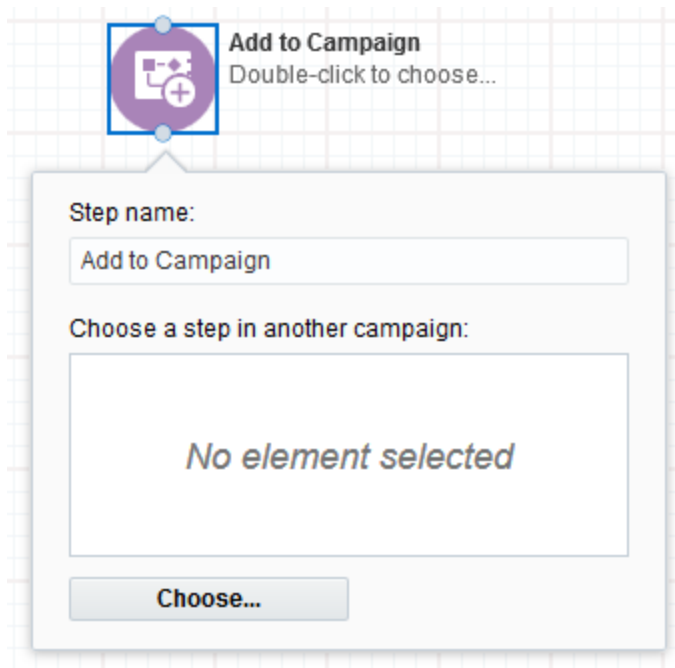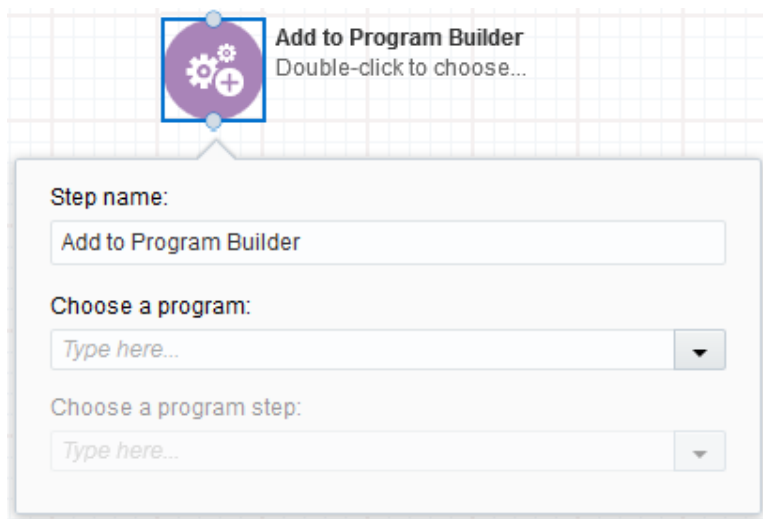
1. Type a new name into the **Step name** text box.

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:

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:
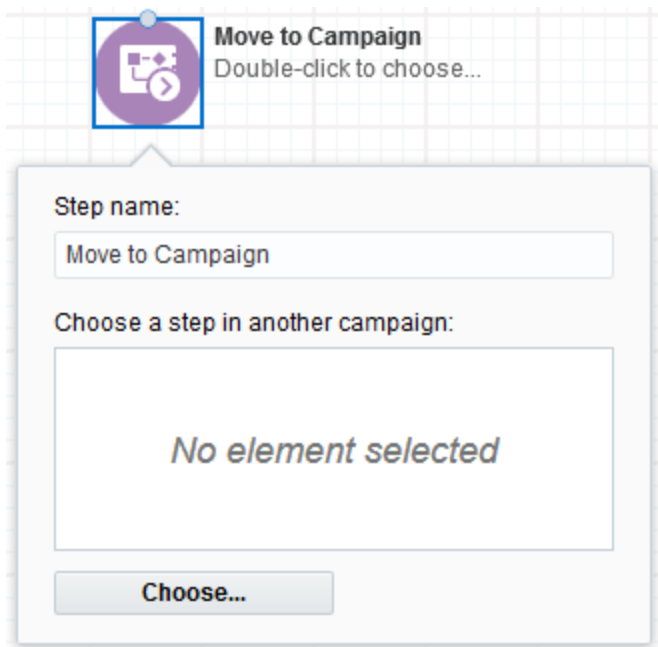
1. Type a new name into the **Step name** text box.

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.
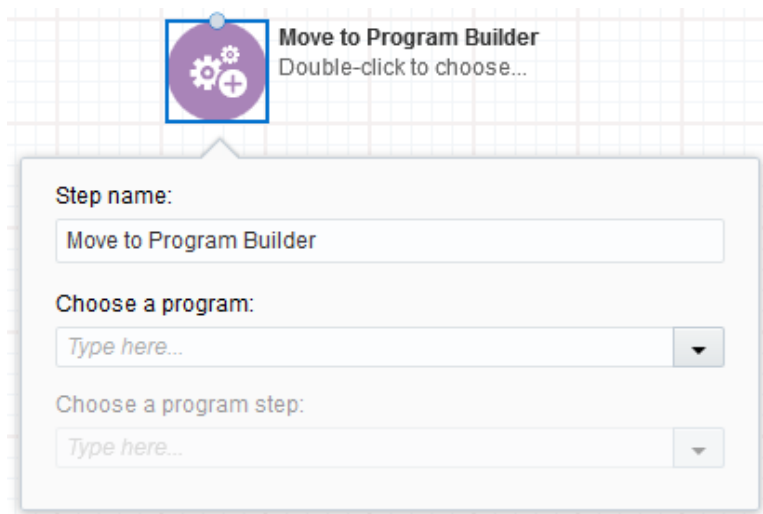
To configure the Add to Shared List element:

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.

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:
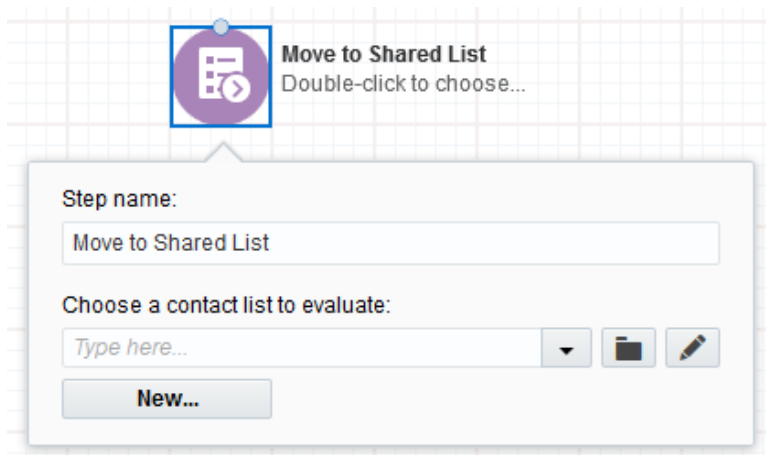
1. Type a new name into the **Step name** text box.

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.

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.
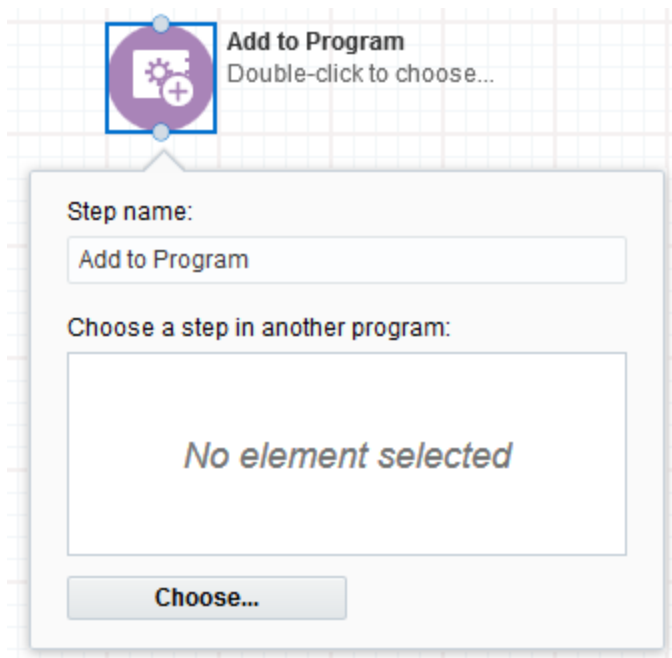
To configure the Add to Program element:

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 an cloud action step.

2. Click **Edit** 🖉 to configure the cloud action. The configuration screen opens in a new tab.

3. Configure the element as desired.

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.
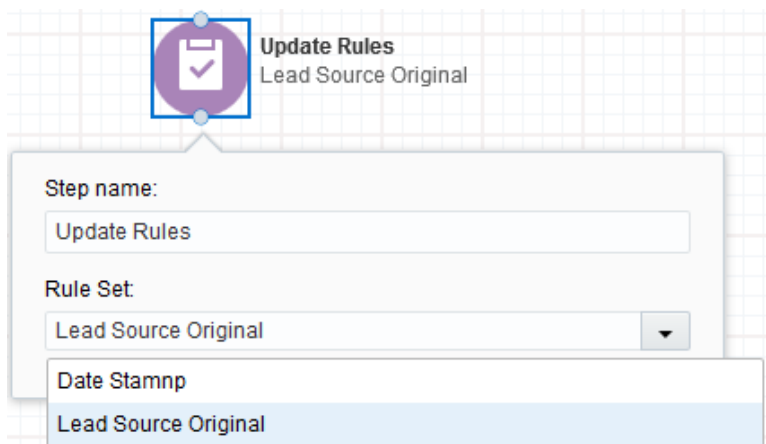
To configure the Update Rules element:

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.

14 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.

> ℹ **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

14.1 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 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 left side.

   - From a simple campaign or A/B testing campaign, select ⟫ and then click **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.

14.2 Overview of campaign 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	The email statistics report displays recent activity for any emails that are a part of a campaign. This report shows the frequency and success rate of email delivery and performance (such as opens, clickthroughs, etc.). 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. Overall, use this report as a spot-check to ensure that your campaign is working.
Campaign Entry	The campaign entry report shows how and when contacts entered a campaign. The primary ways a contact enters a campaign are from segments, from other campaigns and programs, or from

Report	Description
	form processing. However, this report can show additional ways such as through a custom object set or cloud feeder. Use this report to ensure that your campaign is performing correctly, and that contacts are entering the campaign from the intended sources.
Campaign Exit	The campaign exit report shows how and when contacts exited a campaign. 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.

14.3 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.

Metric	Description
Sent	The total number of emails sent.
Total Delivered	The total number of emails delivered. (Total Sent - Total Hard and Soft Bouncebacks)
Hard Bounces	The total number of emails that could not be delivered because of a hard bounceback.

Metric	Description
	A hard bounce is an email that permanently could not be delivered. Some common reasons for hard bounces include an invalid email address or domain name. For more information, see About bounces.
Soft Bounces	The total number of emails that could not be delivered because of a soft bounceback. A soft bounce is an email 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. For more information, see About bounces.
Delivery Rate	The total emails delivered divided by the total emails sent. (Total Delivered / Total Sent)
Total Opens	The number of times an email was opened. This includes multiple opens by the original recipient or forwarded recipient. Oracle Eloqua counts an email as opened if the recipient loaded the tracking pixel image contained in the email or clicked a link in the email. For more information, see Calculating email opens.
Unique Opens	The number of recipients that opened an email at least once. This does not count all the times that the same recipient opened the email.
Open Rate	The total opens divided by the total number of times an email was delivered. (Total Opens / Total Delivered)
Total Clicks	The number of times that any tracked link in an email was clicked. This includes multiple clicks by the same recipient.
Unique Clickthroughs	The number of recipients (original recipients or email forwards) that clicked at least one tracked link in an email. This does not count all the times that the same recipient clicked links 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 who globally unsubscribed or reported the email as spam. This metric does not include unsubscribes from email groups.
Conversions or Total	The number of forms that were submitted as a result of an email. This includes multiple submissions by the same recipient.

Metric	Description
Submits	💡 **Note**: This is only available for simple campaigns or A/B testing campaigns. To view form performance information for a multi-step campaign, use Insight reports.
Campaign Conversion Rate	The number of forms that were submitted as a result of an email divided by the total number of times the email was delivered. (Total Form Submissions from Email / Total Delivered) 💡 **Note**: This is only available for simple campaigns or A/B testing campaigns.
Total Visits	The total visits to a landing page associated with the email. 💡 **Note**: This is only available for simple campaigns or A/B testing campaigns.

14.4 Exporting campaign entry or exit 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 left side.

   - From a simple campaign or A/B testing campaign, select ⟫ and then click **Operational Reports**.

4. Choose **Campaign Entry Report** or **Campaign Exit Report**.

5. Choose a date range from the **Evaluation period** drop-down, then click **Refresh**.

6. Click **Export**.

ⓘ Enter your Email Address and configuration details below. We will send you an email containing a link to the exported data.

Email Address: mmark@oracle.com

Export Fields: ⦿ Current view fields
○ All contact fields

Export Format: ⦿ Comma-Separated Value (.csv)
○ Microsoft Excel (.xls)

Cancel   **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.

14.5 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.

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.

2. To refresh the report, click **Refresh**. When you refresh, the contacts in the step may change.

3. To download the report to a .csv or Microsoft Excel file, click **Export**. A link to the export file will be emailed.
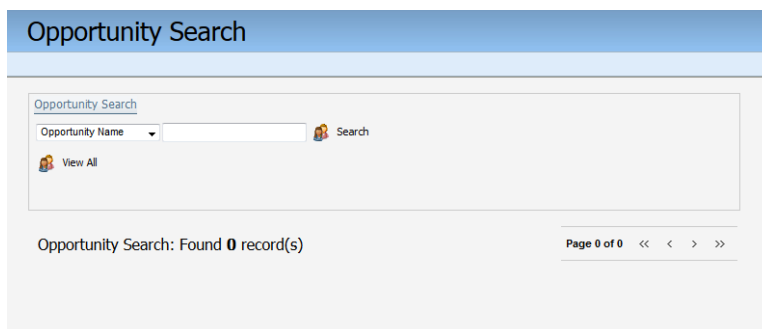
15 Search for existing opportunities

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. Click **Actions** [»], then click **Opportunity Search**.
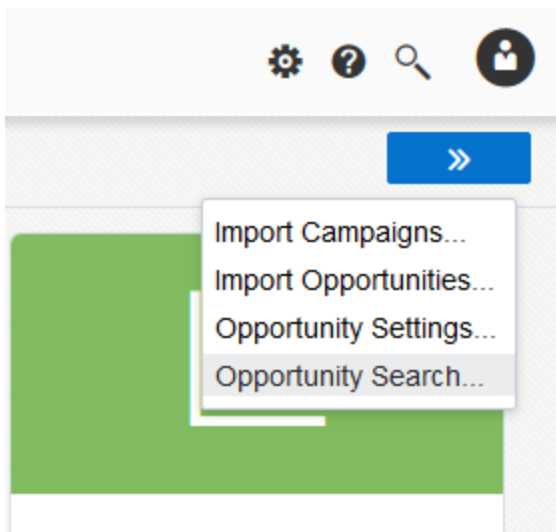
The Opportunity Search window opens.

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.

16 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.

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

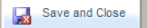The **attribution** method used as the default for all Opportunities is: ***All to the first Campaign*** 🖉 Edit

To configure opportunity settings:

1. Navigate to **Orchestration** ⊞, then click **Campaigns**.

2. Click **Actions** [»], then click **Opportunity Settings**.

   The *Opportunity Settings* configuration window opens.

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

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.

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:

- Which Campaign responses do 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, or

- From lead creation in Oracle Eloqua to opportunity *creation* in the CRM.

- How do you want to distribute the revenue across the Campaigns? — You can attribute the revenue:

    - Evenly across all campaigns

    - To the first or last campaign responded to, or

    - By specific percentages to first, last, and other campaigns).

10. Click **Save and Close**.

17 "Run as other user" for campaigns

Every time a user 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: Choose... 📅   ⬚ : ⬚   PM

(UTC-05:00) Eastern Time (US & Cana ▾

▶ **Campaign Activation End Time**

10/16/2016 📅

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)

Cancel   **Activate**

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. To search for campaigns, click one of the following on the left menu:
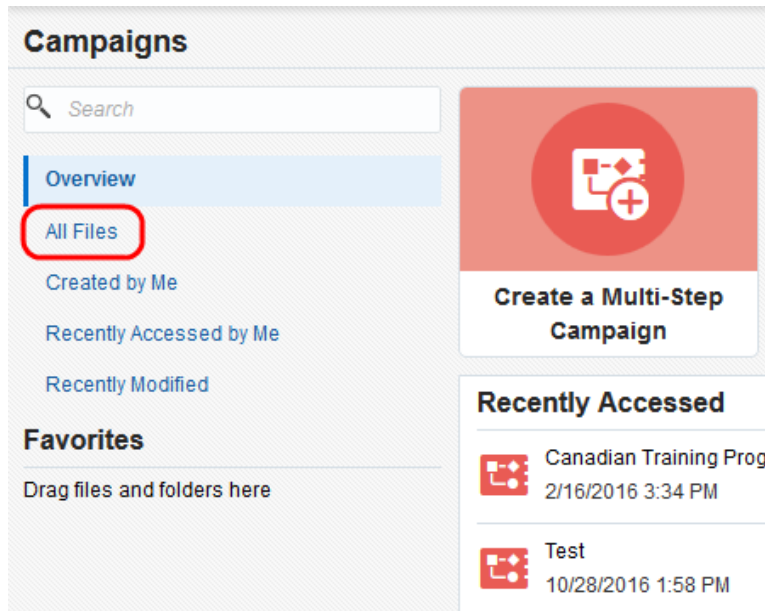
   - **All Files**: Displays a list of all files available to you, including files authored by others.

   - **Created by Me**: Displays a list of files authored by you.

   - **Recently Accessed**: Displays a list of files recently opened by you.

   - **Recently Modified**: Displays a list of recently edited files, including files modified by others.

   Alternatively, type the name of the desired file in the *Search* field.

3. Locate the campaign you want to edit, then open it through one of two ways:

   - Double-click the file.

   - Right-click the file, then select **Open**.
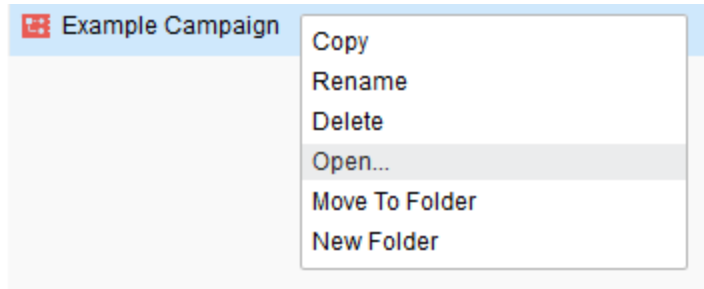
4. Click **Deactivate** if the campaign is active.

5. Edit the program as needed, then click **Save**.

6. Click **Activate**.

7. 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.

8. 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.

18 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) 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.

18.1 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 edit any of the approvers (reviewers) in the workflow while a campaign is active. You must deactivate all active campaigns in your Oracle Eloqua instance before you can make changes to the workflow.

# 18.2 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.
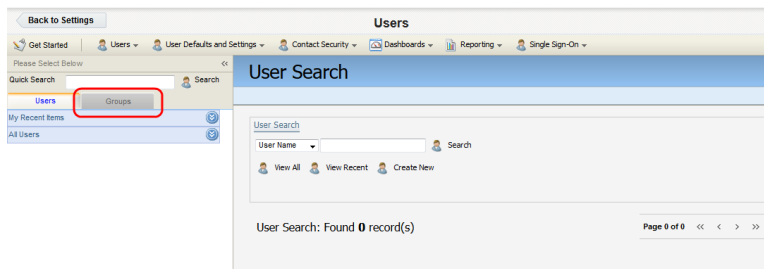
4. Locate the security group that requires approvals access. You have three options to achieve this:

   a. Expand the *All Groups* drop-down, then click the **+** symbol next to the *Groups* folder to navigate into that folder.
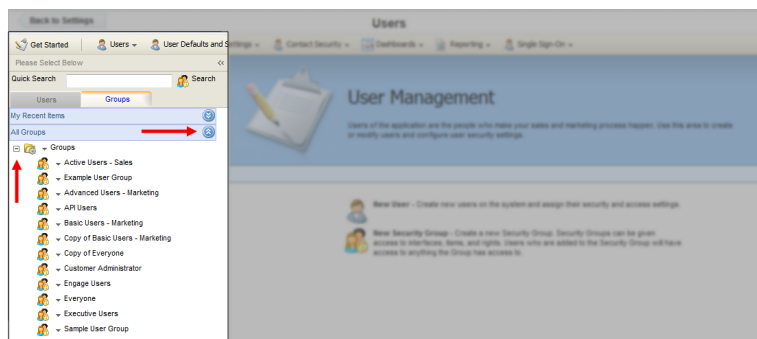
   b. Expand the *My Recent Items* drop-down to access a list of recently created or modified security groups available to you.
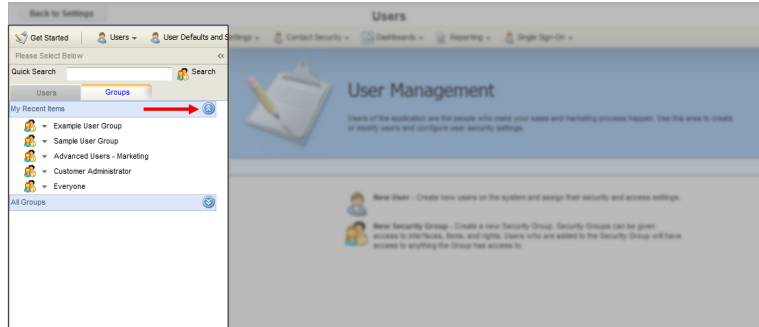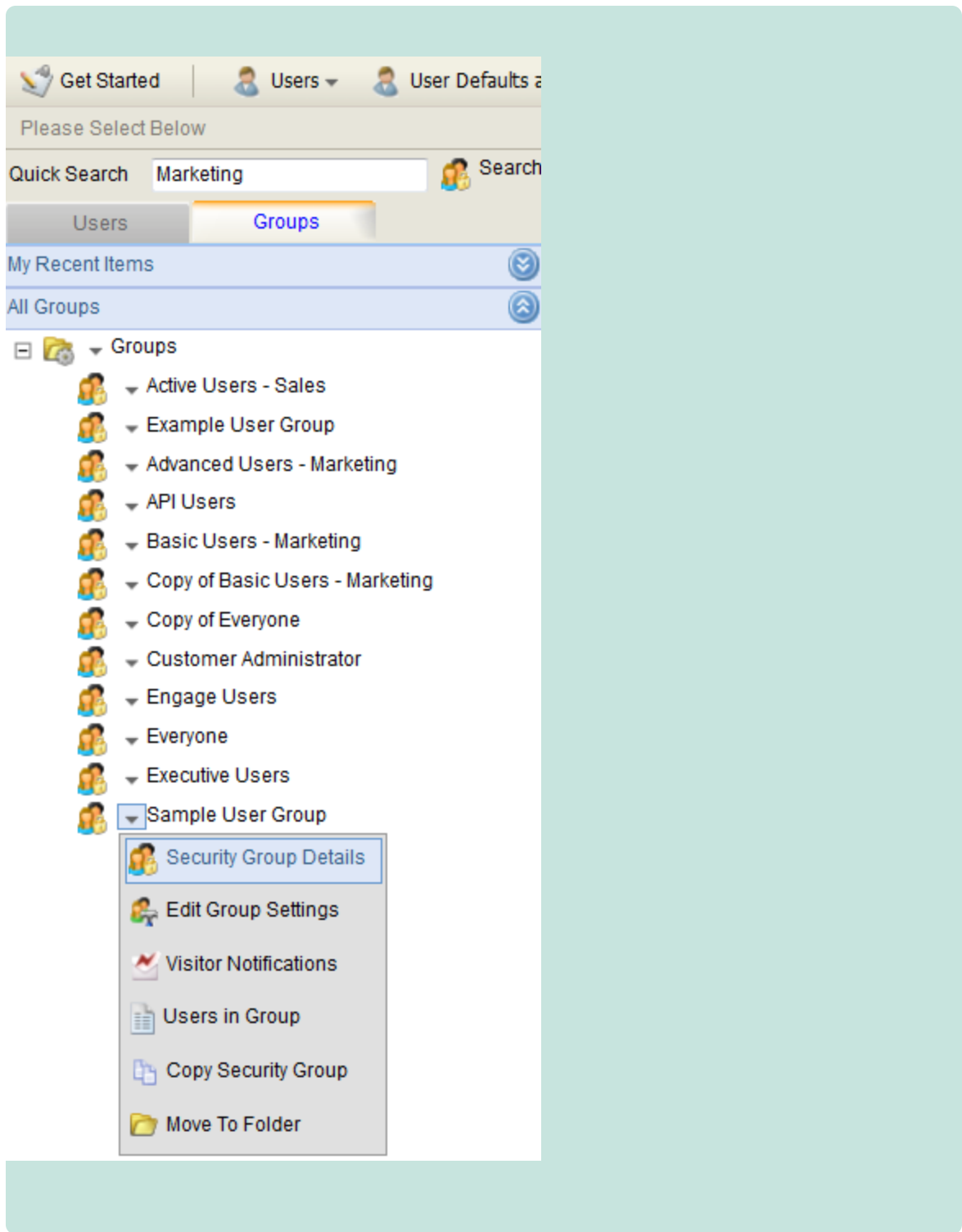
c. Type the first few letters of the group into the *Quick Search* field, then press **Enter**.

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]

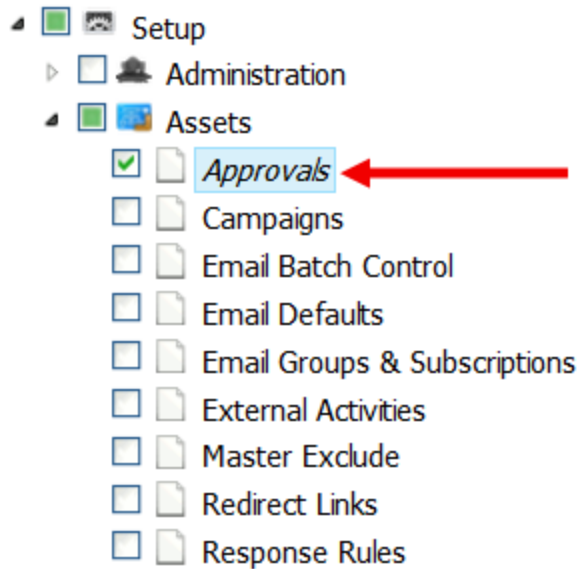No Interfaces have been selected

[Edit]

8. Scroll down to **Settings**, then click **Setup** to expand it.
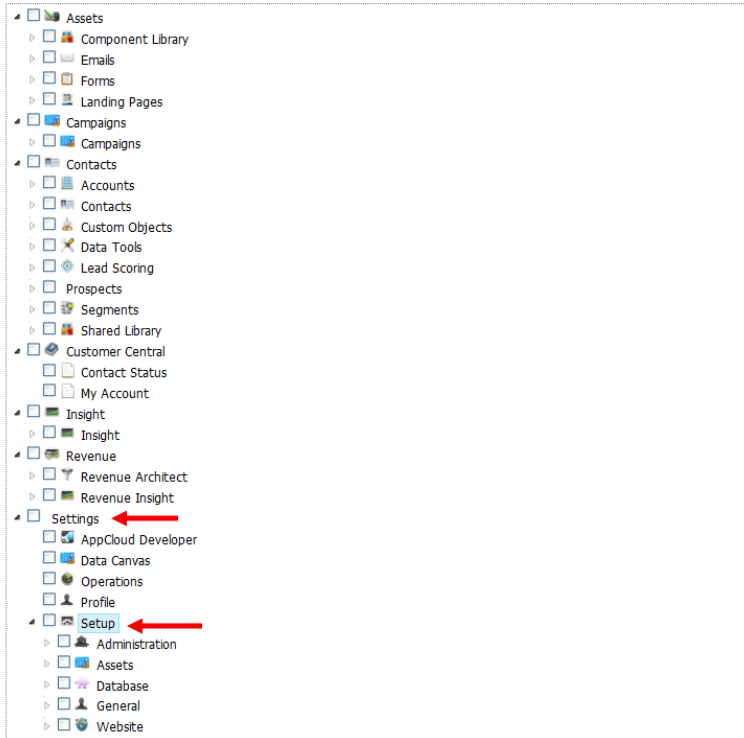
9. Click **Assets** to expand it, then select the **Approvals** check box.


10. Click **Save**.

The security group has been granted approval permissions.

## 18.3 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.
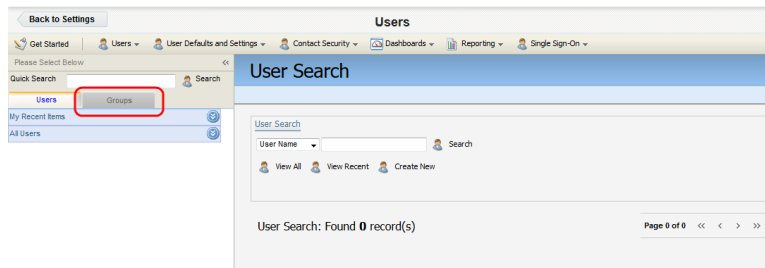
4. Locate the user group you want to modify. You have three options to achieve this:

   a. Expand the *All Users* drop-down, then click the **+** symbol next to a folder in order to navigate into that folder.
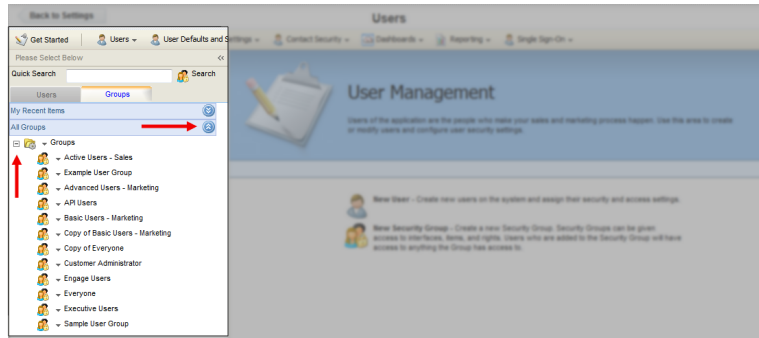
b. Expand the *My Recent Items* drop-down to access a list of recently created or accessed user profiles available to you.
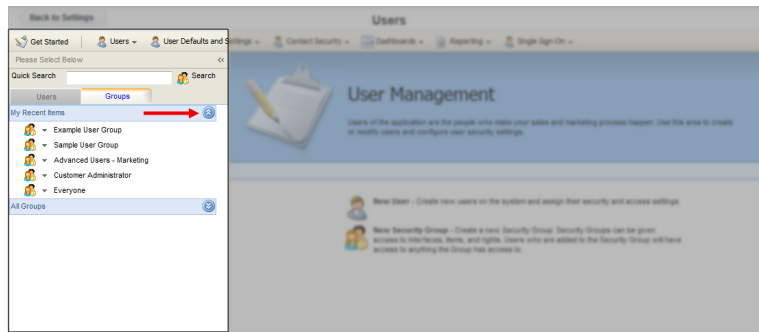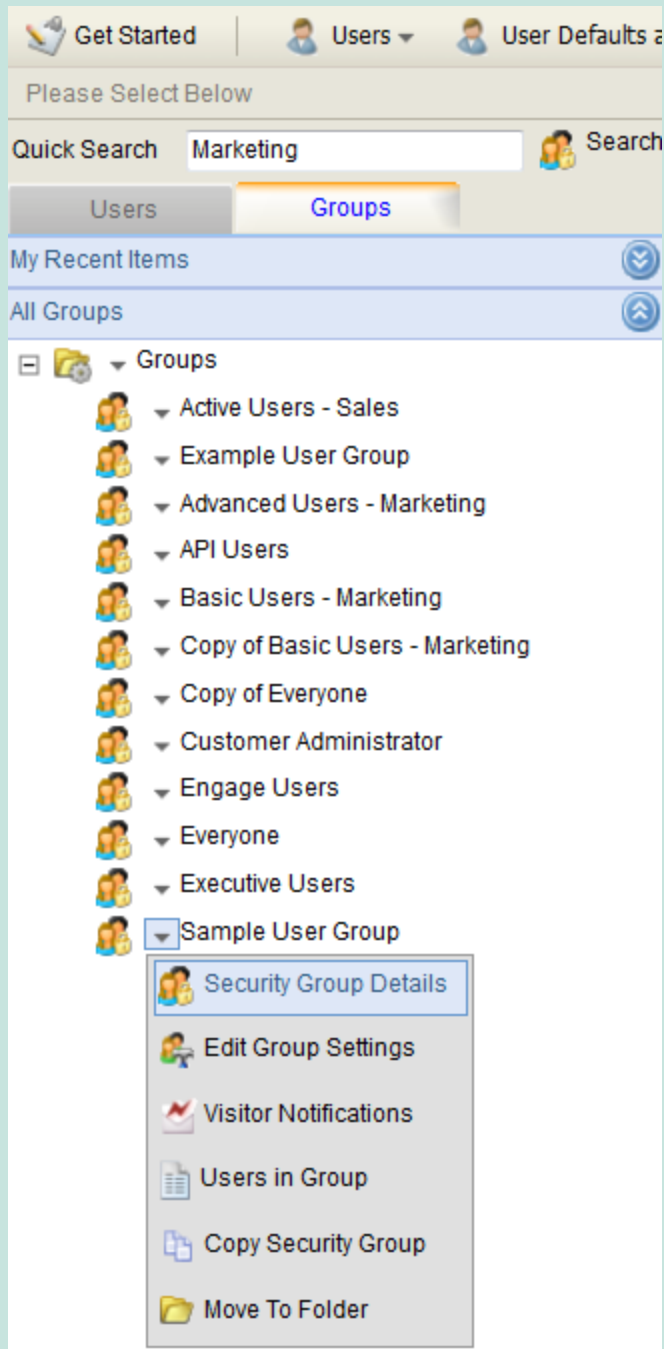

c. Type the first few letters of a user profile into the *Quick Search* field, then press **Enter**.

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**.

7. Click **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.

- 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**.

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

	View	Edit	Delete	Security	Activate	
Asset Creator	☑	☑	☑	☑	☑	
Active Users - Sales	☑	☐	☐	☐	☐	Delete
Advanced Users - Marketing	☑	☑	☑	☐	☑	Delete
Basic Users - Marketing	☑	☐	☐	☐	☐	Delete
Customer Administrator	☑	☑	☑	☑	☑	Delete
Isaac.Steele	☑	☑	☑	☑	☑	Delete

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

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

18.4 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.

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:

CONTENT REVIEW 🔳 Test

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.

18.5 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.
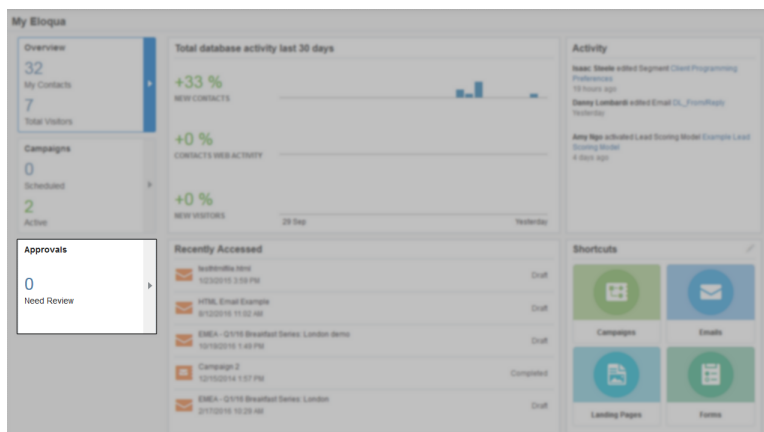
Current campaigns pending approval and their status are displayed under *Approvals*, while approval history and any responses from reviewers are displayed under *History*.

18.6 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 any stage (step) in the process if you have customer administrator rights.

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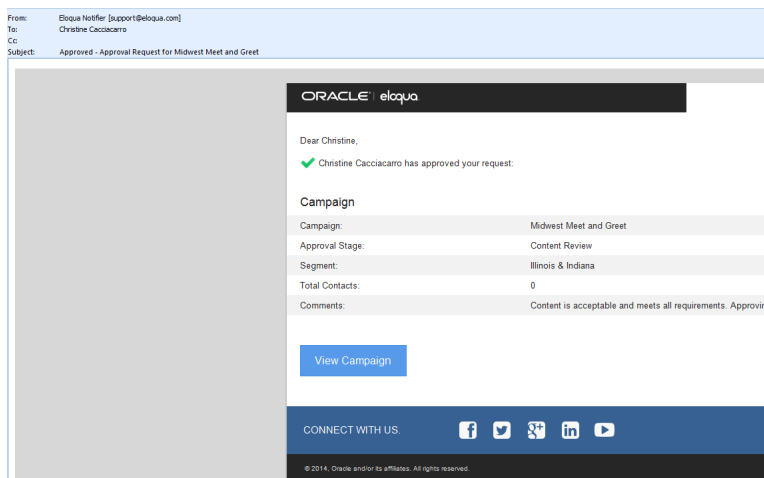
  The *Status* tab is updated to show that approval has been granted via a green check mark. The approvals workflow continues and the reviewer(s) responsible for the next step is notified that their approval is required.

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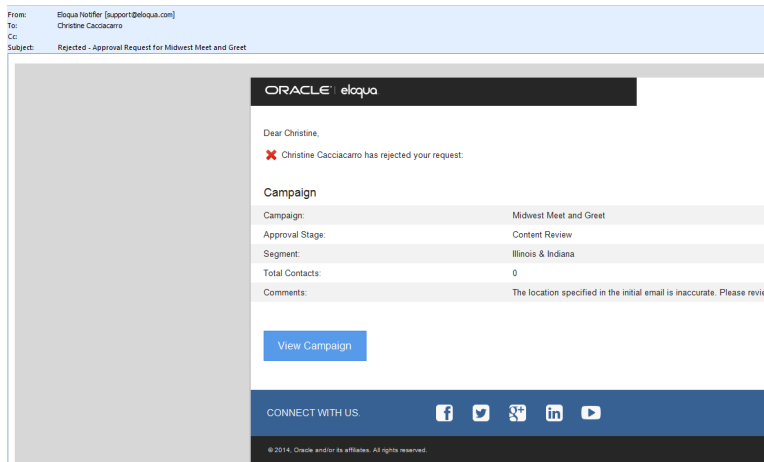
The approvals process stops and the campaign reverts to *Draft* status. The reviewer's reason for rejecting the campaign at this stage is displayed on the history tab:

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.

19 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.

19.1 Customizing campaign permissions

After creating a campaign, the creator has full permission to the campaign. The creator or an administrator can customize who can view, edit, delete or activate an individual campaign.

> ♡ **Note**: Administrators set default campaign permissions. Customizing campaign permissions override those defaults.

To customize campaign permissions:

1. Navigate to **Orchestration** ⊞, then click **Campaigns**.

2. Open an existing campaign.

3. Click **Actions** 〈 ≫ 〉, then click **Permissions**.

4. Do one of the following:

   - To add a user or user group to the list, click **Add** ✚.

   - To remove a user or user group, click the user or group. Click **Delete** 🗑.

5. Select the check boxes to set the permissions for the user or user group.

6. Click **Save**.

19.2 Setting default permissions for campaigns

Administrators can modify the security permissions of users and security groups, granting permissions to users or groups to activate or deactivate a campaign they create, or grant permissions to other users and groups for a particular campaign. This is a default permissions setting.

> 📓 **Example**: If you enable every check box except **Activate**, when a campaign is created the user can edit and delete it, but they cannot activate it. This can be useful when you want to go through an approval process within your organization before activating a campaign, see Campaign approvals.

Before you begin:

- Ensure the user or security group has asset creation permissions. These permissions control the types of assets (emails, landing pages, and so on) that the user or security group can create.

To grant default activation permissions for campaigns:

1. Click **Settings** ⚙️.

2. Click **Users** in the *Users and Security* area.

3. Click the **Groups** tab in the left panel.

4. Locate the user group you want to modify.

5. Click the security group in the left pane.

6. Click **Default Asset Permissions**.

7. Click **Edit**.

8. Choose **Campaigns** in the left-hand pane of the group details window.

> ℹ **Important**: If *Campaigns* is not listed, you must grant this group creation permission. From the group overview page, click **Asset Creation**, then click **Edit**. Enable the check box next to **Campaigns**, then click **Save**.

9. Set the appropriate **Asset Creator** permissions. This will determine what users can do with the assets they can create.

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.

		View	Edit	Delete	Security	Activate	
Campaigns	Asset Creator	☑	☑	☑	☑	☑	
Company Views	Active Users - Sales	☑	☐	☐	☐	☐	Delete
	Adriana.Onelogin	☑	☑	☐	☐	☐	Delete
Contact Filters	Advanced Users - Marketing	☑	☑	☑	☐	☑	Delete
Contact Groups	Basic Users - Marketing	☑	☐	☐	☐	☐	Delete
Contact Views	Customer Administrator	☑	☑	☑	☑	☑	Delete

To add a user or security group to this permissions list, search for the users or groups that you want to assign activate permissions to using the search box, then click **Add**. Enable the check boxes to give this user permissions. These users or security groups will also have permission by default when new campaigns are created by users in the security group you are editing.

10. Click **Save** when finished.

20 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.

In order 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

20.0.1 Walkthrough
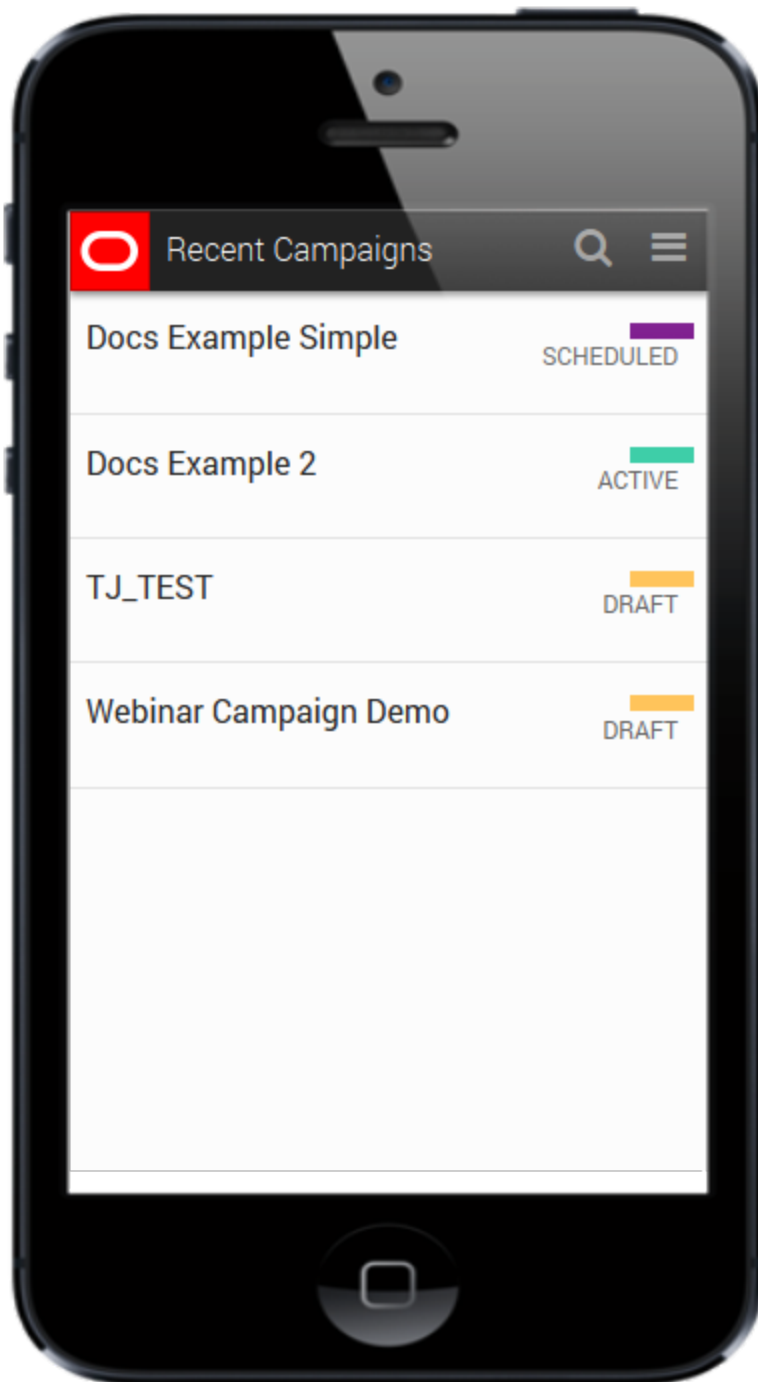
The central screen of the Mobile Campaign Manager lists your recently-viewed campaigns, and visually indicates their status, either draft, scheduled, or active. The

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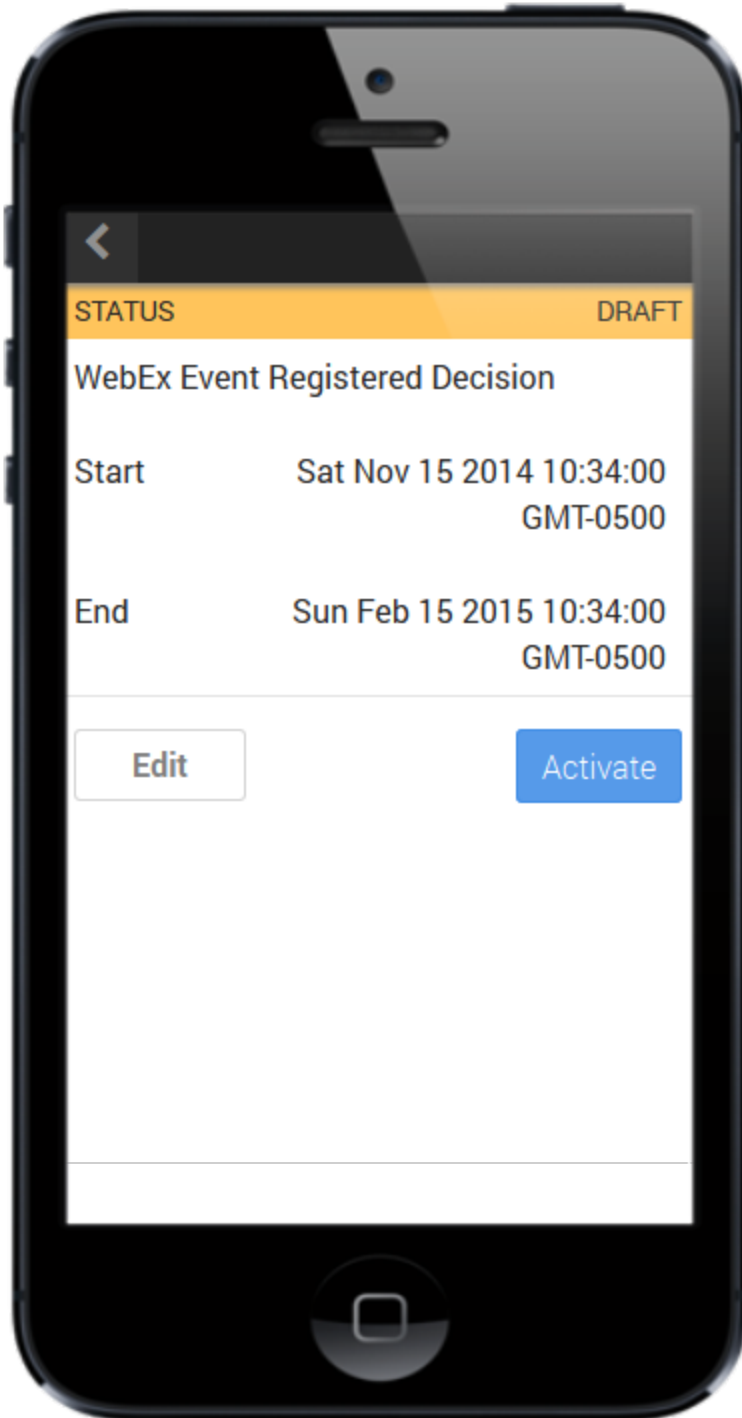
Scheduled campaigns include a button to deactivate the campaign and prevent it from proceeding.

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.

STATUS   ACTIVE

Docs Example Simple

Start   Friday, October 24, 2014
                             10:00:00 AM EDT

End   Saturday, January 24, 2015
                             10:00:00 AM EST

                                    Deactivate

EMAILS

Sample Email - Docs
Subject: Hello, World!

            21   0
          SENT   OPENS
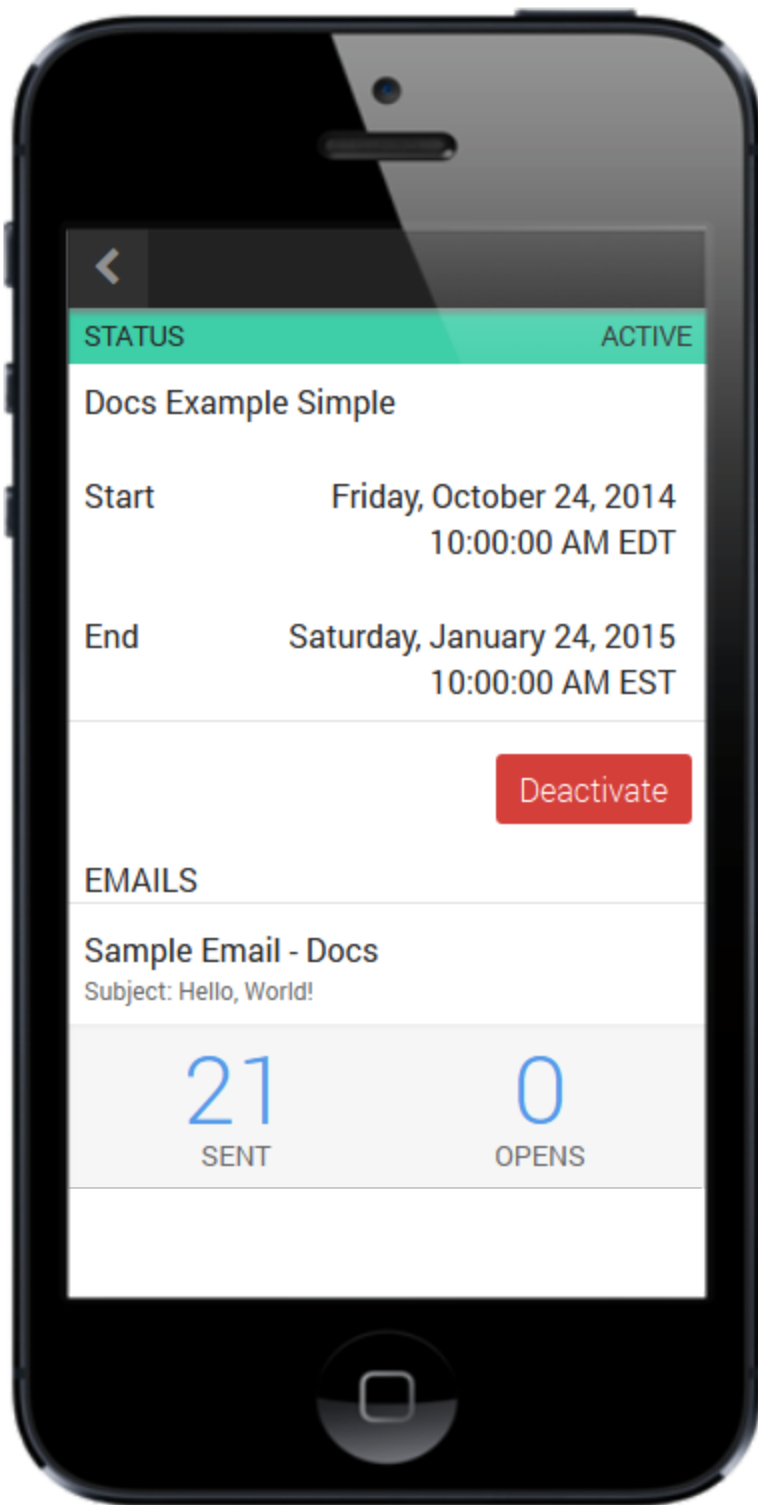
20.1 Installing Mobile Campaign Manager

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

> ℹ️ **Important**: The installation process must be done by a user with client administrator rights.

To install Mobile Campaign Manager:

1. Follow the URL provided:

    https://cloud.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

20.2 Scheduling and unscheduling 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.

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.

Example

Cancel

Docs Example 2
ACTIVE

Docs Example Simple
DRAFT

Draft Campaign Example - Simple
DRAFT

Scheduled Campaign Example
SCHEDULED

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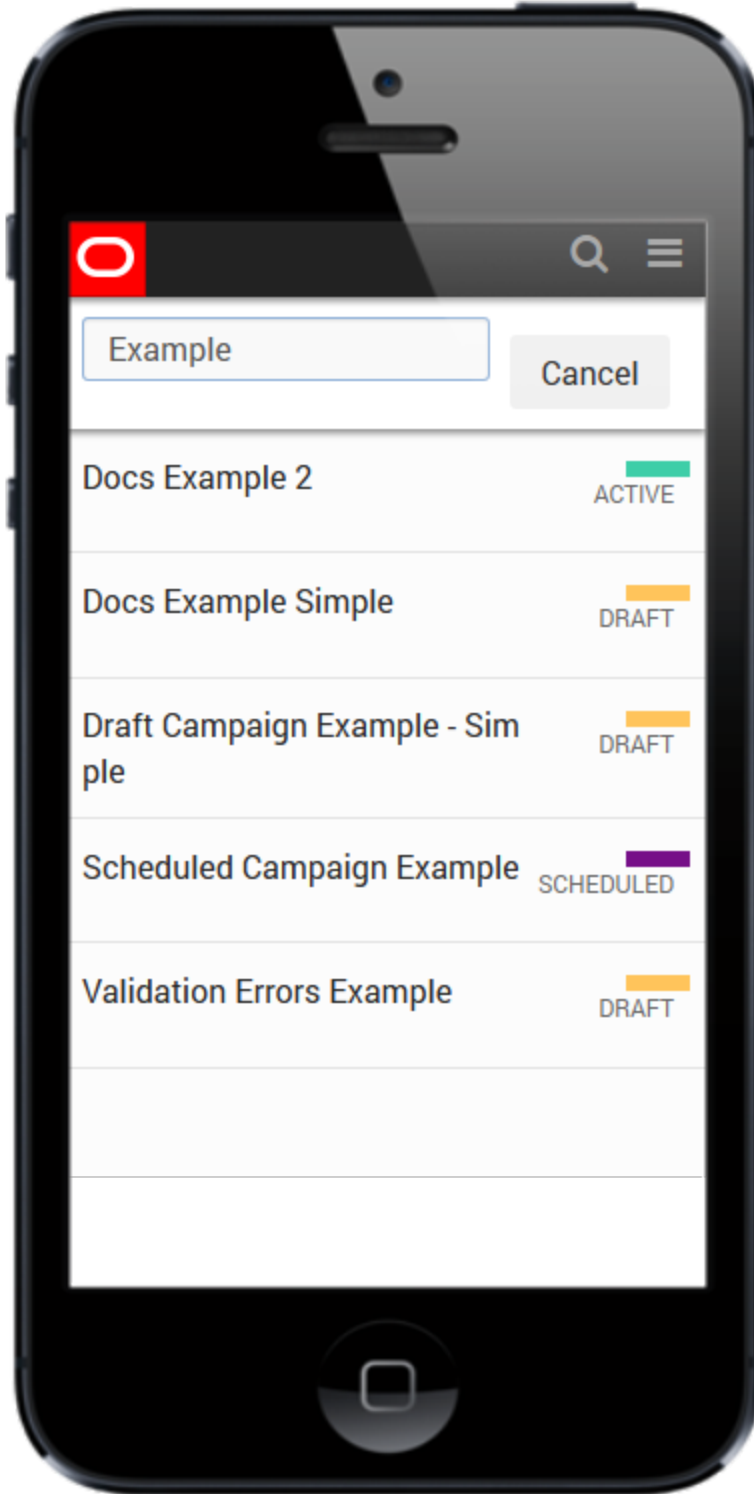
The campaign status screen will open, showing the campaign status, the start and end dates, and any related assets.

3. Select **Edit**. You will be prompted to select when you would like the email campaign to launch.
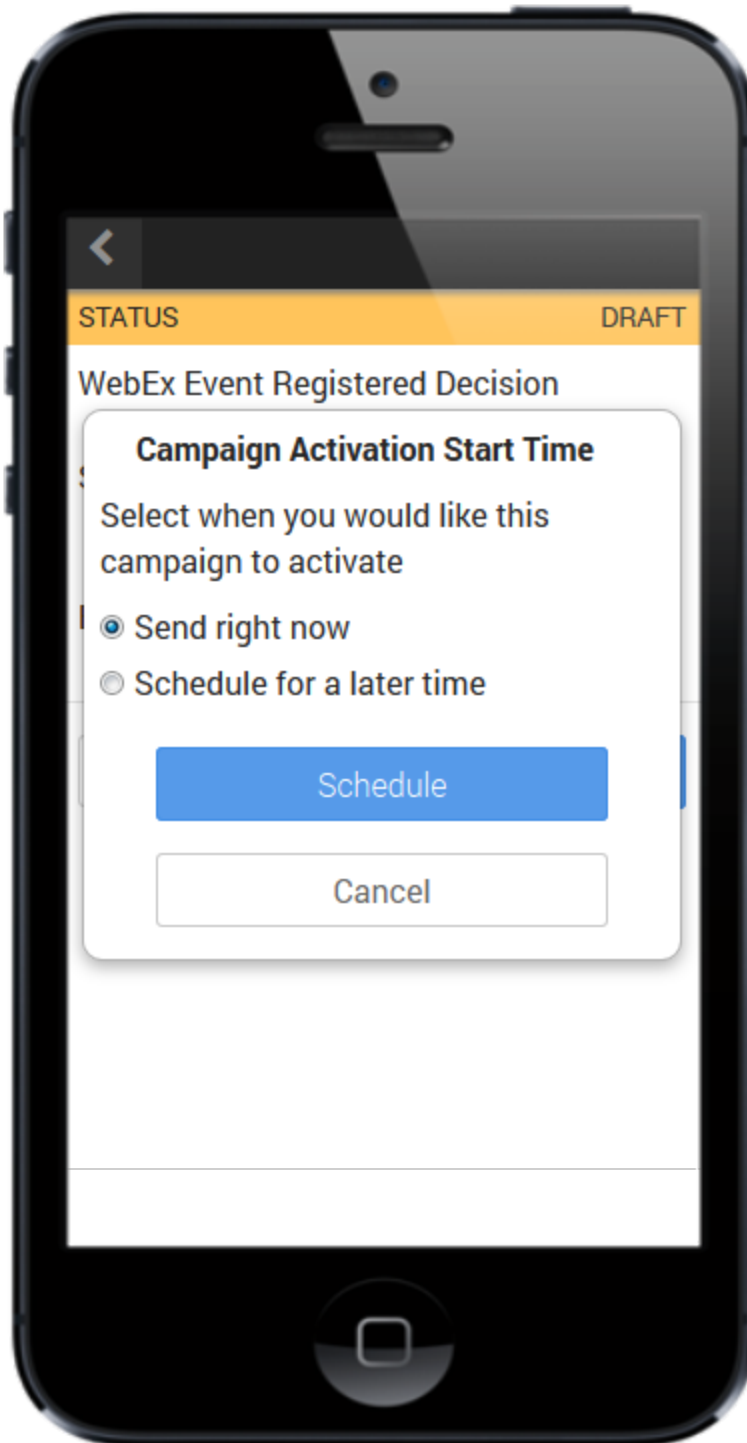
4. Choose to either **Send right now**, or **Schedule for a later time**. This will overwrite the scheduling information you provided when you created the campaign in Eloqua. If you choose to schedule at a later time, you will need to provide the date and time that the campaign should go live.

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.

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.

Example

Cancel

Docs Example 2
ACTIVE

Docs Example Simple
DRAFT

Draft Campaign Example - Sim
ple
DRAFT

Scheduled Campaign Example
SCHEDULED

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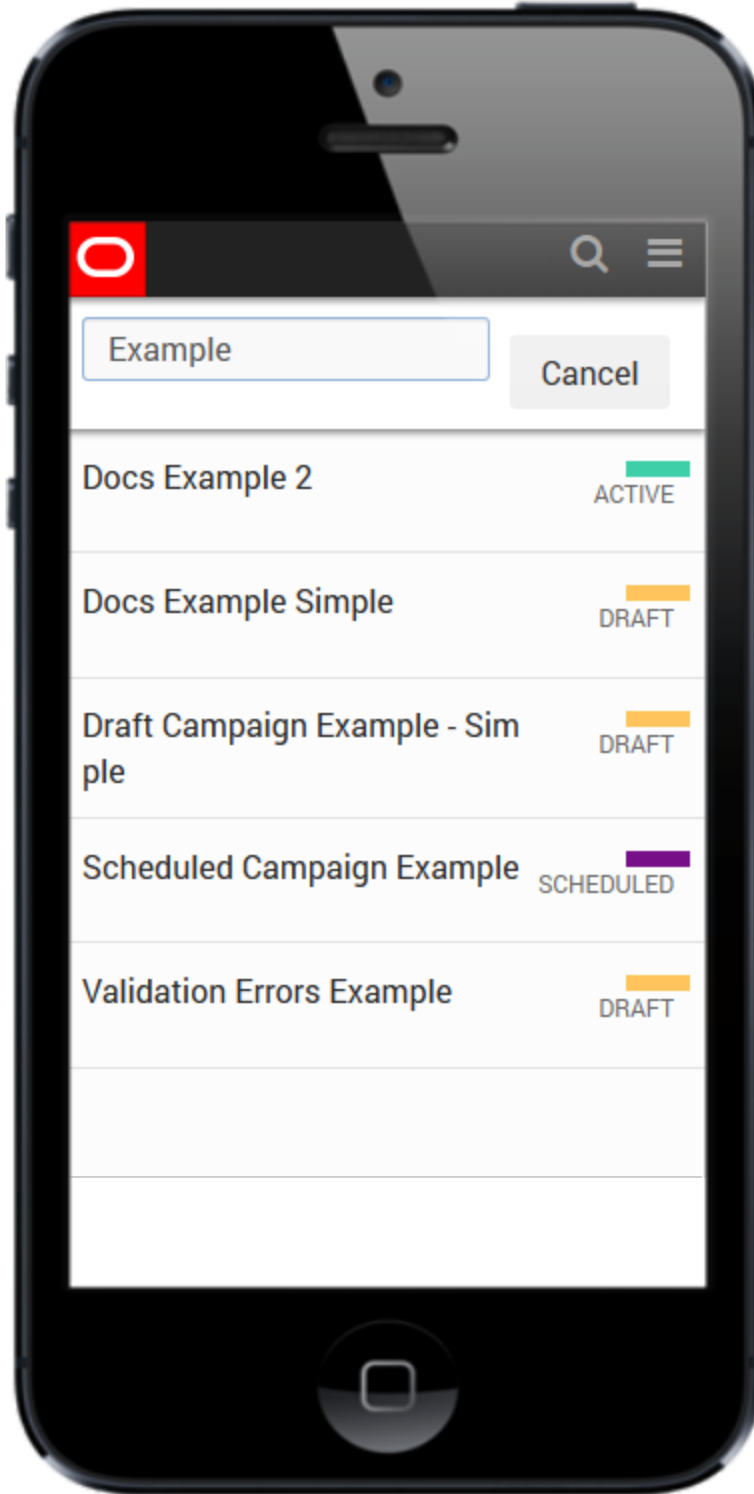
The campaign status screen will open, showing the campaign status, the start and end dates, and any related assets.

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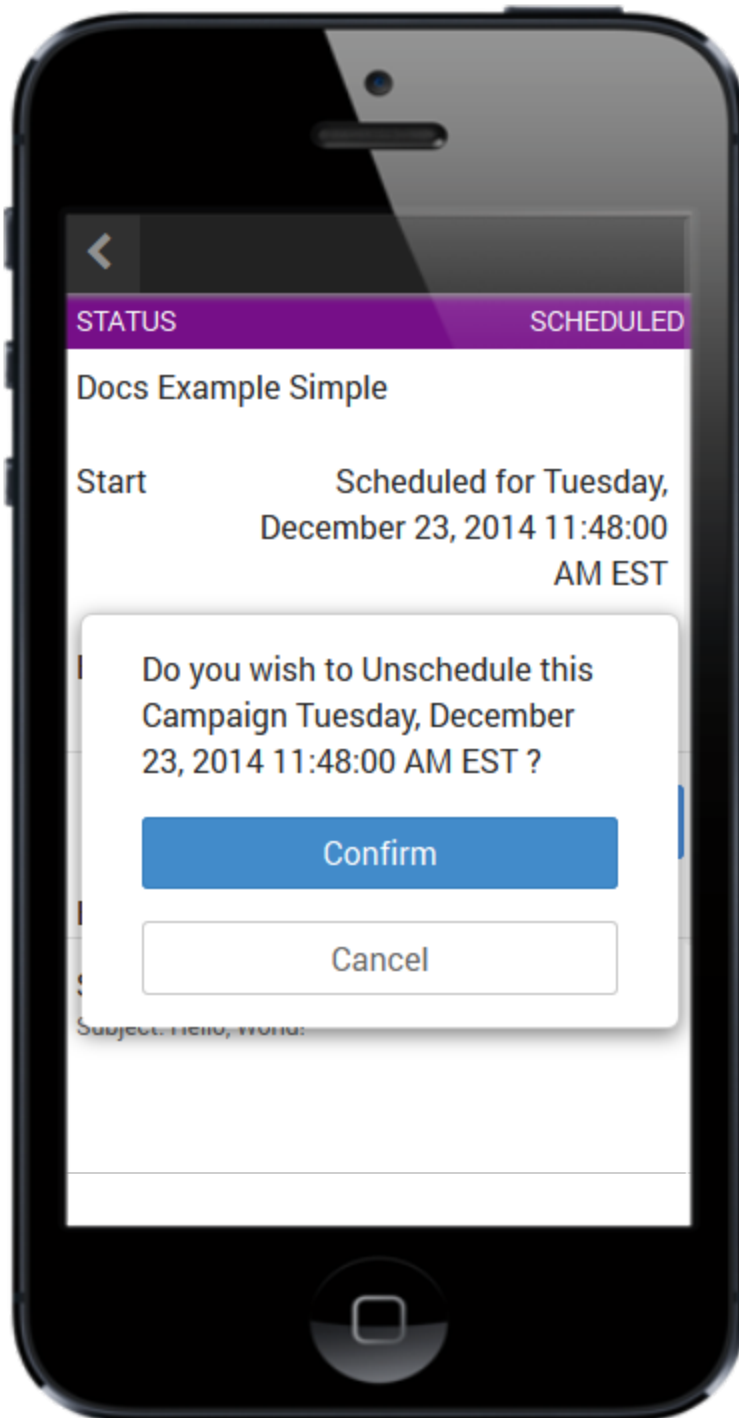
4. Select **Confirm**.

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

20.3 Activating a campaign with the Mobile Campaign Manager

With the mobile campaign manager, you can activate a campaign and from your mobile device.

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

**To activate a campaign with the mobile campaign manager:**

1. Open the mobile campaign manager on your mobile device.

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.

Example

Cancel

Docs Example 2

ACTIVE

Docs Example Simple

DRAFT

Draft Campaign Example - Sim
ple

DRAFT

Scheduled Campaign Example

SCHEDULED

Validation Errors Example

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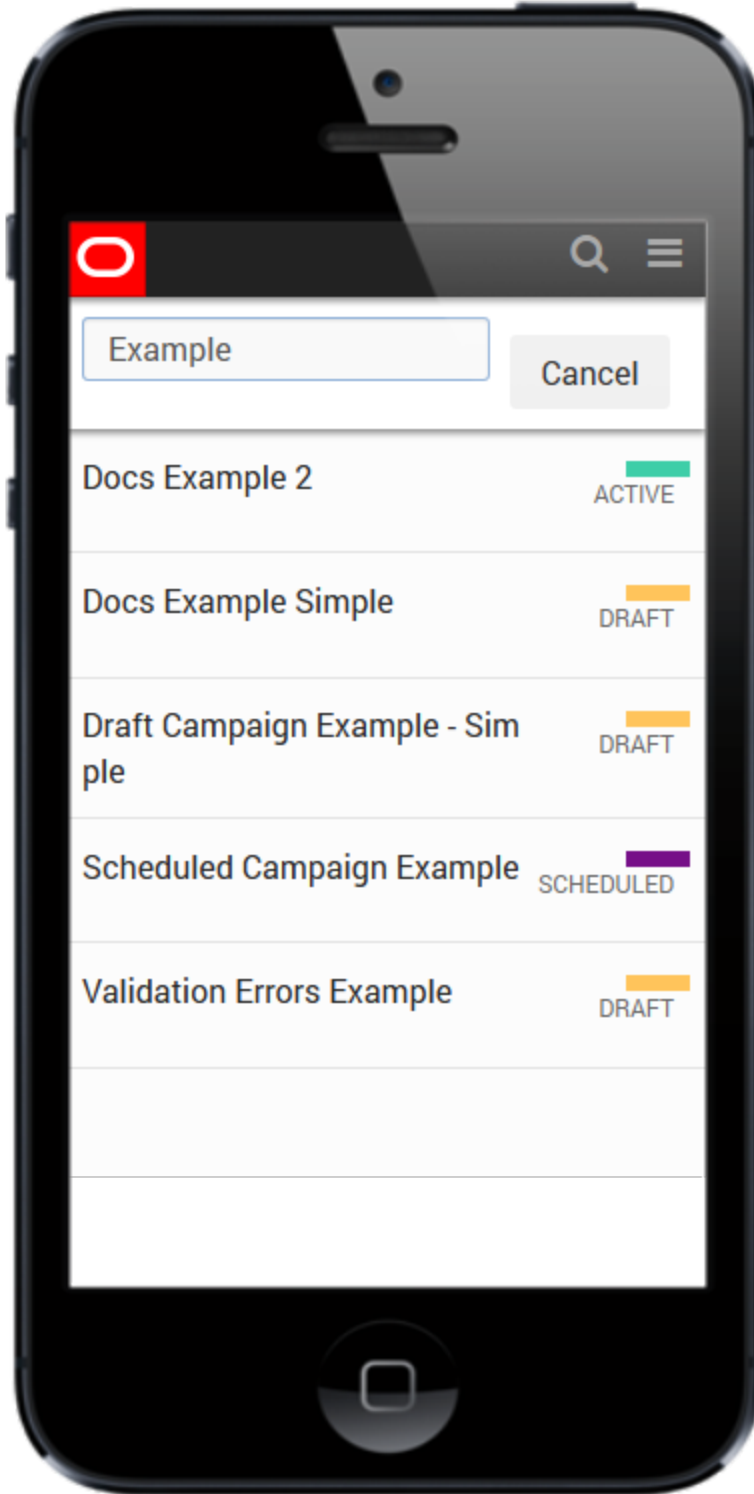
The campaign status screen will open, showing the campaign status, the start and end dates, and any related assets.

3. If your campaign is not scheduled, or if you wish to change the scheduling, tap **Edit**. You will be prompted to confirm that you wish to activate the campaign on its configured Start Date.

STATUS   DRAFT

WebEx Event Registered Decision

Start   Sat Nov 15 2014 10:34:00 GMT-0500

End   Sun Feb 15 2015 10:34:00 GMT-0500

Edit   Activate

4. Then, you can activate your campaign by tapping **Activate**.

The campaign status screen will refresh to show that the campaign is now scheduled. When the campaign begins, its status will show as Active and provide some simple campaign reporting metrics.

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

STATUS ACTIVE

Docs Example Simple

Start   Friday, October 24, 2014
                            10:00:00 AM EDT

End   Saturday, January 24, 2015
                            10:00:00 AM EST

Deactivate

EMAILS

Sample Email - Docs
Subject: Hello, World!

21   0
SENT   OPENS

20.4 Deactivating a campaign with the Mobile Campaign Manager

With the mobile campaign manager, you can deactivate a campaign and from your mobile device.

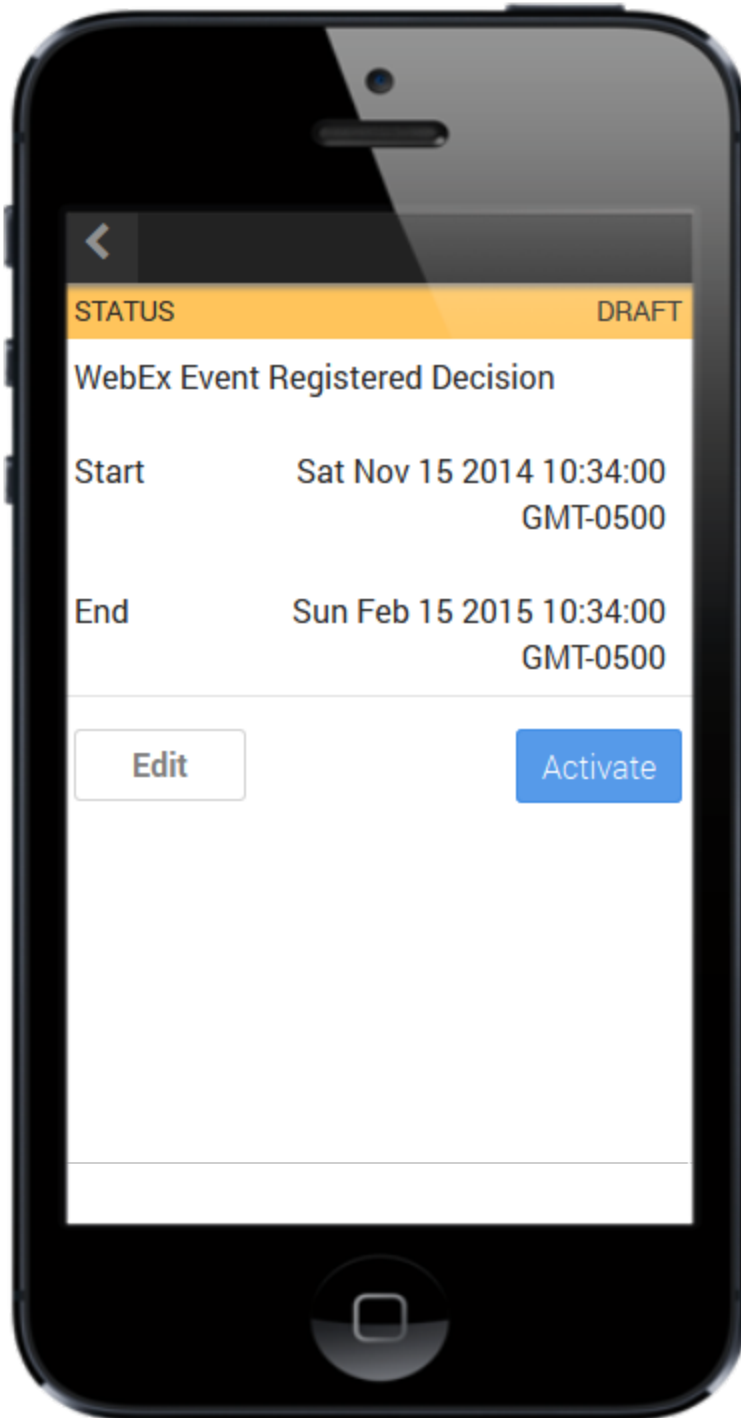**To deactivate a campaign with the mobile campaign manager:**

1. Open the mobile campaign manager on your mobile device.

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.
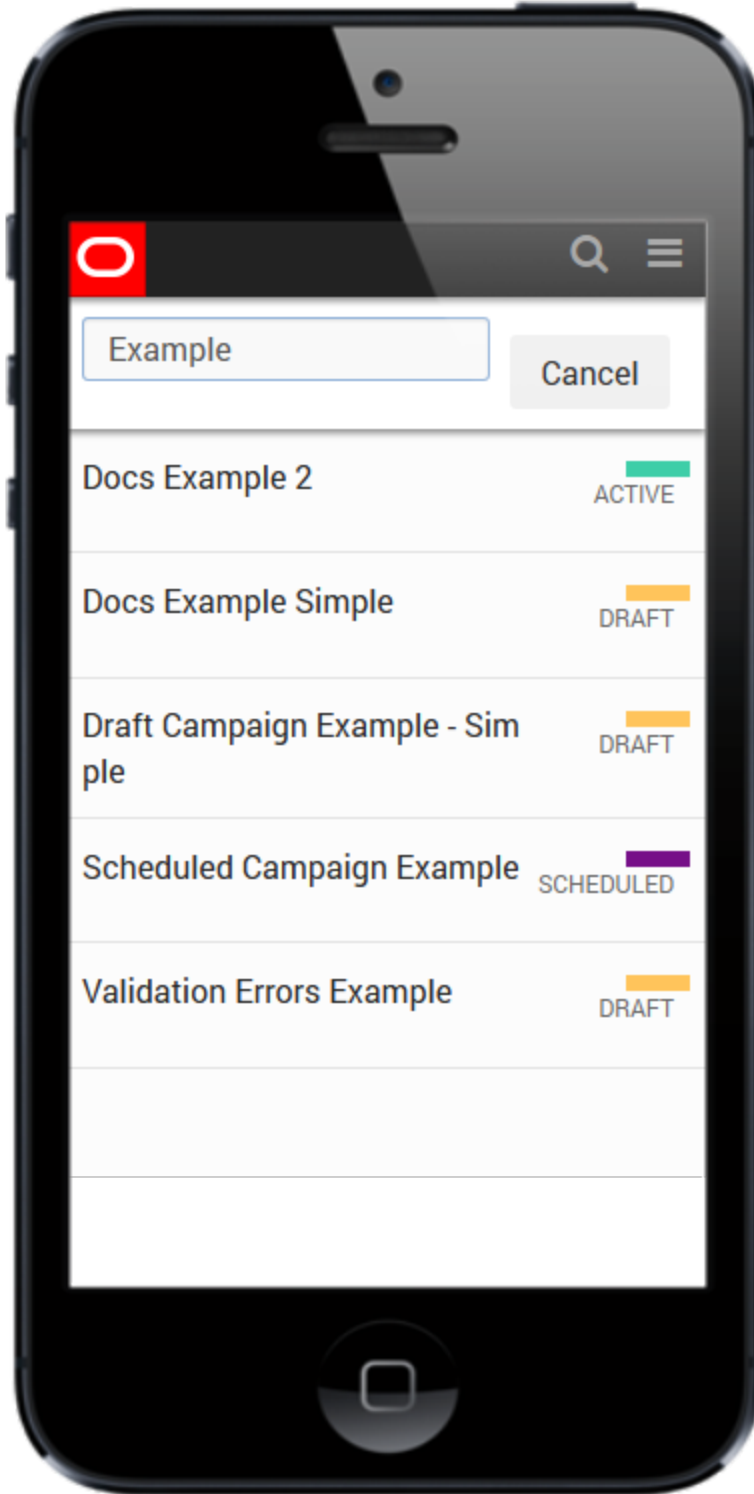
The campaign status screen will open, showing the campaign status, the start and end dates, and any related assets.
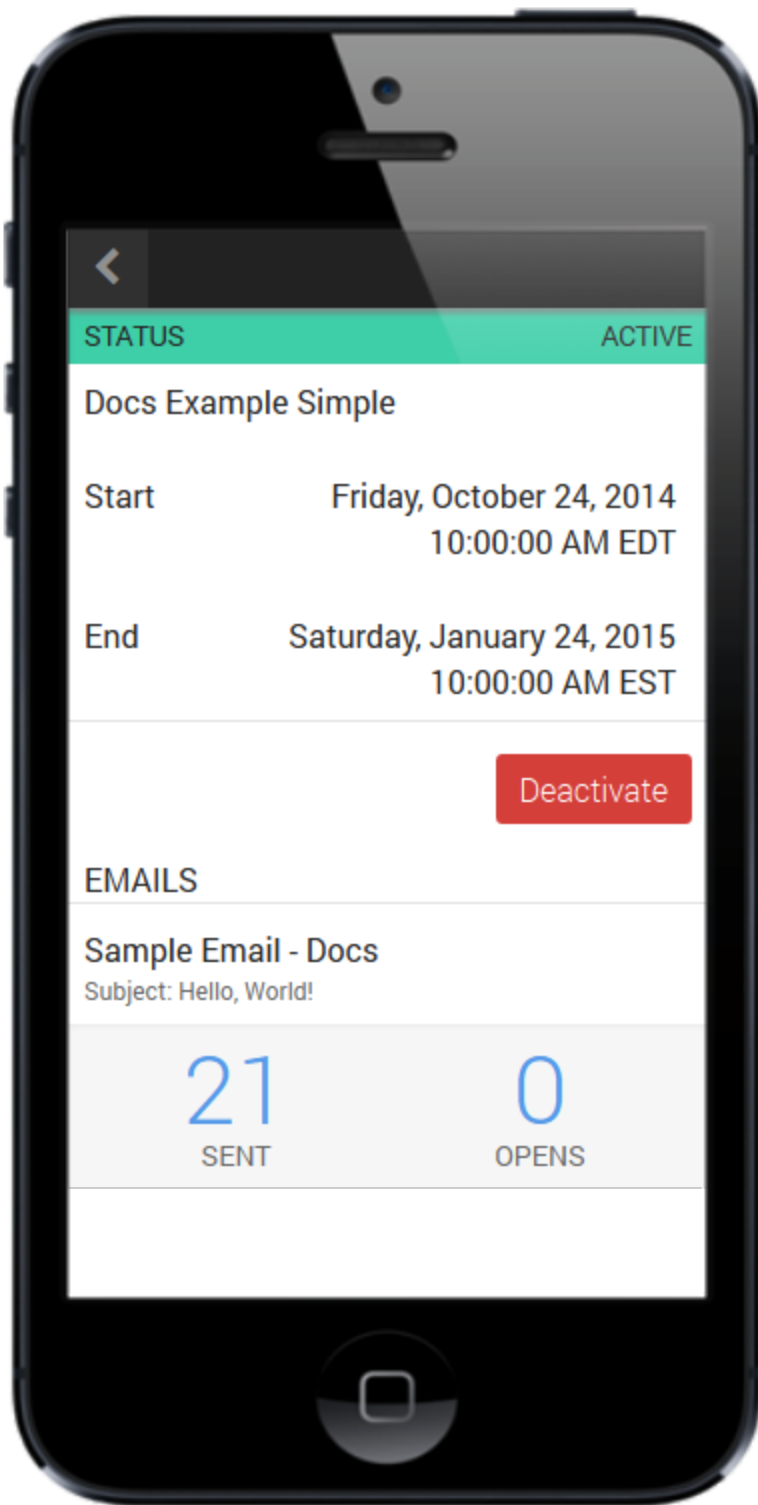
3. Select **Deactivate**. You will be prompted to confirm that you wish to deactivate the campaign. Select **Confirm**.
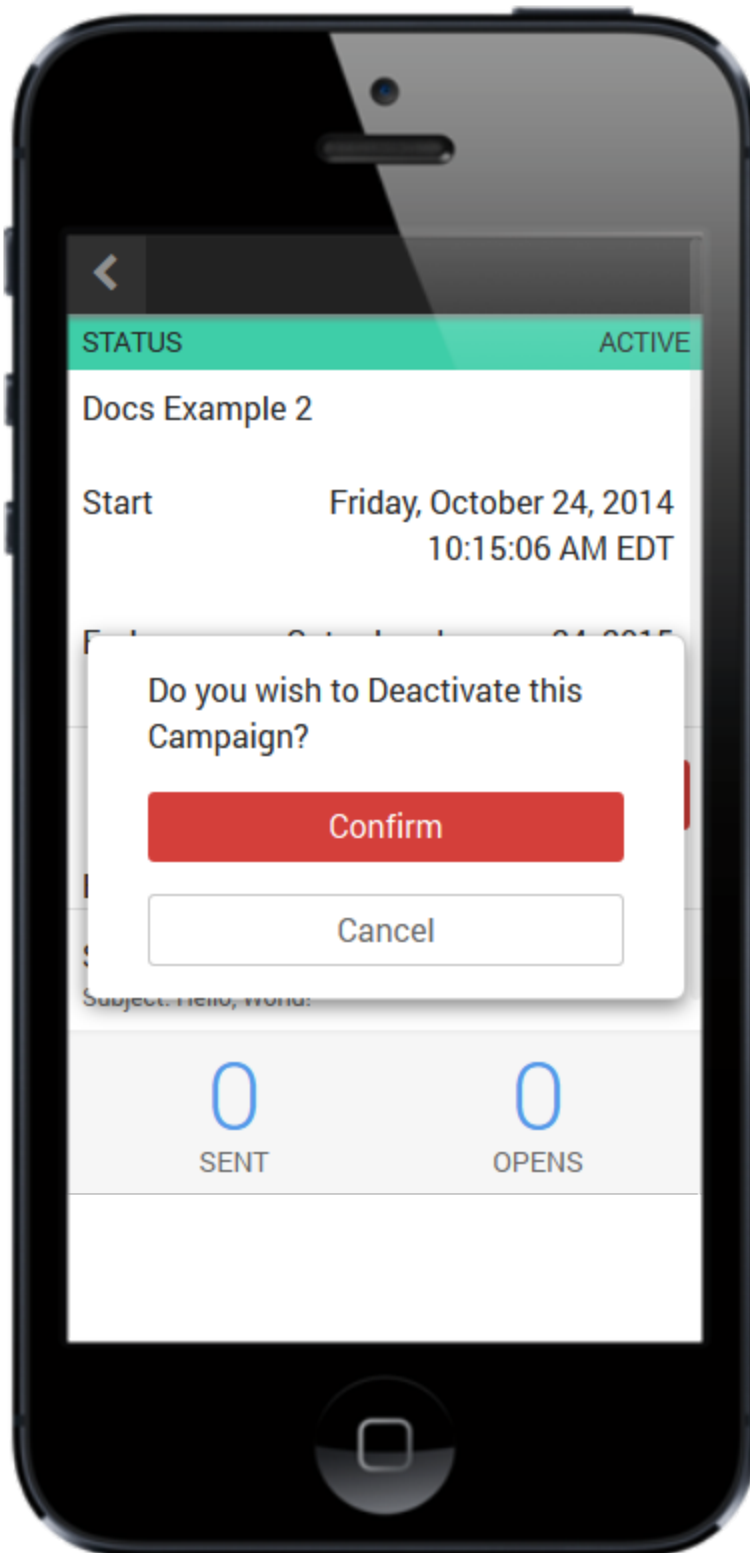
The campaign status screen refreshes to show that the campaign has been deactivated as is now in the Draft status.

21 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.

21.0.1 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.
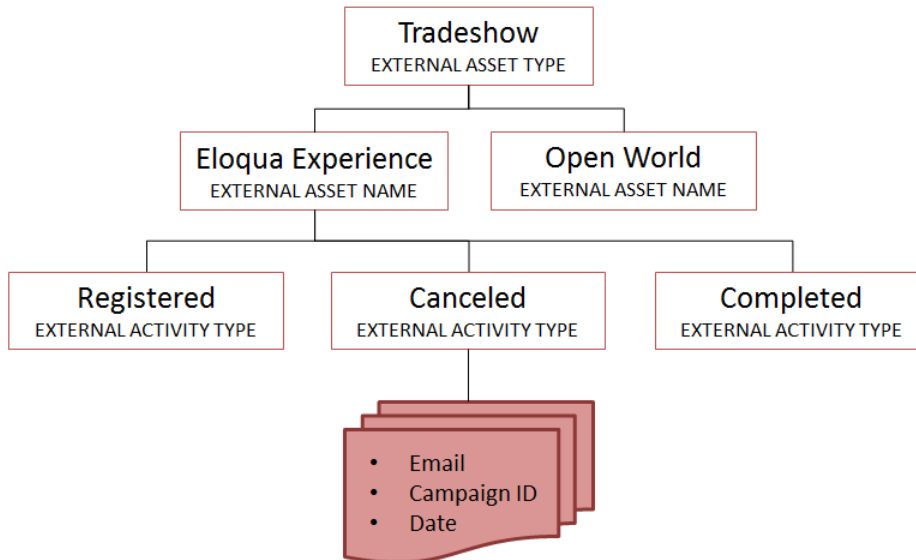
For a pre-existing campaign, when you upload external activities into your Oracle Eloqua instance, the upload file must include all of the information above. If you are creating the activity while creating a campaign, you do not need to include the campaign ID.

21.1 Creating external asset types and activity types

Create external asset types an 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** ⚙.

2. Click **External Activities** in the *Database Setup* section.

3. Click the ➕ in the lower-left corner of the window to add a new external asset type.
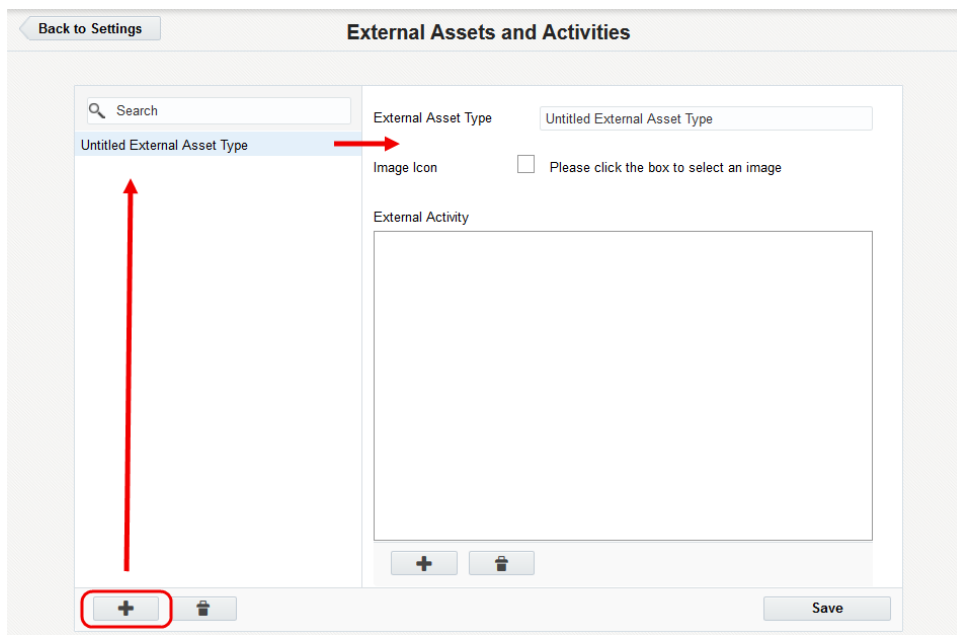
4. Type a name for the asset type in the **External Asset Type** field. For example, Tradeshow.

5. If you want to associate an image with the asset type, click the **Image Icon** check box and choose the image from the component library.

6. Click **Add** ➕ in the right pane to add the activities that contacts will perform for this asset type. For example, Viewed a Demo.
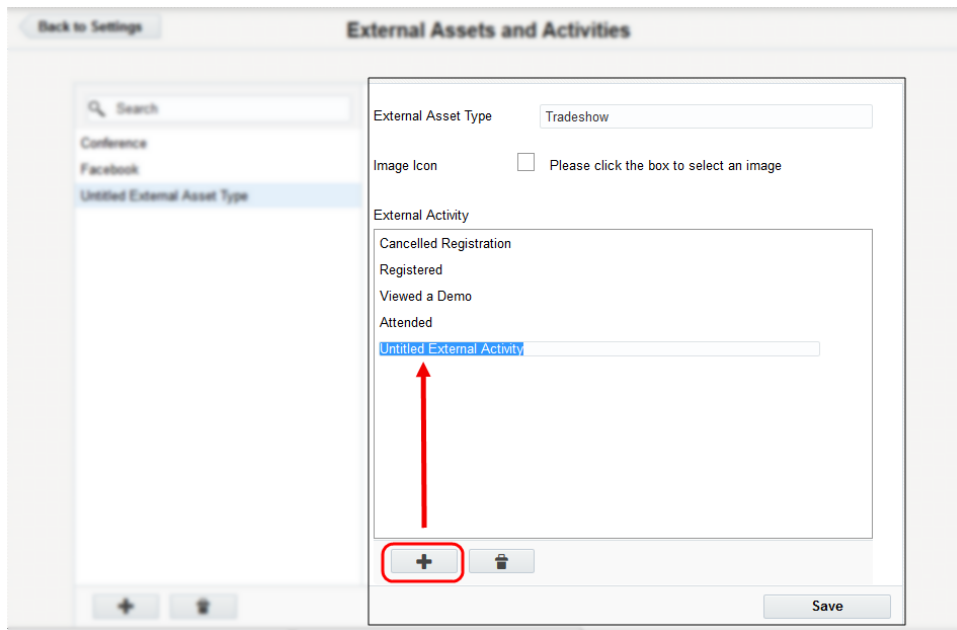
7. Click **Save**.

21.2 Uploading external activities

Most likely, you will have exported data from another source, perhaps tradeshow activities. You can upload this information to Oracle Eloqua using an upload file.

Before you begin:

- Create your upload file (.txt, .csv, .xls, .xlsx). The .csv file that you upload 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.

- 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.

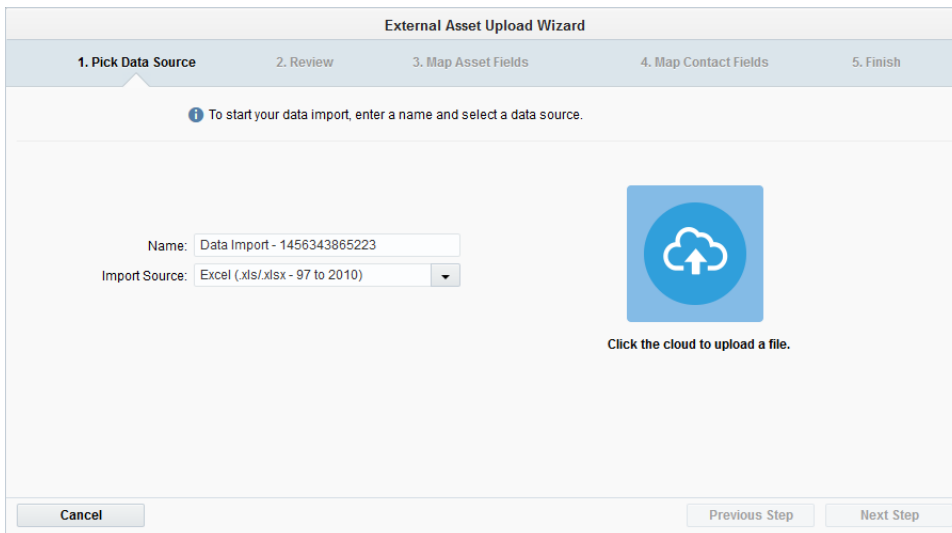- Additional contact fields can be included as well like first and last name, and so on.

  > 💡 **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
  > preformed 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. Click **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. Then click ☁ and browse to the upload file.

   The upload wizard continues to step 2.

External Asset Upload Wizard

| 1. Pick Data Source | 2. Review | 3. Map Asset Fields | 4. Map Contact Fields | 5. Finish |

ⓘ Here's a preview of your uploaded data. Please review the data to make sure that it is correct.

Email	elqcampaignid	External Asset Type	External Activity	External Asset Name	Date
andrew.stivelman@oracle.com	30839	Tradeshow	Registered	Eloqua Experience 2016	01/13/20
allison.burnett@oracle.com	30839	Tradeshow	Registered	Eloqua Experience 2016	01/13/20
hank.scorpio@globex.com	30839	Tradeshow	Canceled Registration	Eloqua Experience 2016	01/13/20
wile.e@acme.ca	30839	Tradeshow	Attended	Eloqua Experience 2016	01/13/20
milton@initech.org	30839	Tradeshow	Registered	Eloqua Experience 2016	01/13/20

Cancel   Previous Step   Next Step

4. Verify the contents of the file on the **Review** tab and click **Next Step**.

External Asset Upload Wizard

| 1. Pick Data Source | 2. Review | 3. Map Asset Fields | 4. Map Contact Fields | 5. Finish |

ⓘ Decide how required asset & activity fields get mapped to the columns in your list below.

Source Field	Target Field
Email	
elqcampaignid	Campaign Id
External Asset Type	External Asset Type
External Activity	External Activity
External Asset Name	External Asset Name
Date	
First Name	
Last Name	

All Fields Update Type   Always update

Cancel   Previous Step   Next Step

5. Complete the **Map Asset Fields** window and click **Next Step**.

- Make sure you map all the data in your upload file to the applicable Oracle Eloqua field.

- Also, make sure that you select when you want the fields to update using the **All Fields 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. If a specific field should be updated differently than the rest, you can double-click the field and configure the update type for that specific field.

6. Complete the **Map Contact Fields** window and click **Next Step**.

   - Make sure you map all the data in your upload file to the applicable Oracle Eloqua field.

   - Also, make sure that you select when you want the fields to update using the **All Fields 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. If a specific field should be updated differently than the rest, you can double-click the field and configure the update type for that specific field.

7. Complete the final step of the wizard.
   - To place all the contacts into a shared list, click the **Place Contacts into a Shared Contact List** check box and choose the shared list.

8. 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.

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.

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

21.3 Viewing external activity on contact records

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**.

Summary	Field Details	Preferences	Campaigns	**Activity Log**	Scoring	Linked Records

	All Activities ⇕	8/4/2016 📅	to	6/8/2017 📅

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

21.4 Editing external assets and activities

You can edit an existing external asset and its activities.

> 💡
>
> **Note**: 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.

To edit an external asset and its activities:

1. Click **Settings** ⚙.

2. Click **External Activities** in the *Database Setup* section.

3. Click on a currently existing asset type in the left panel. The asset details will appear in the right panel.

4. Type a new name in the *External Asset Type* field.

> 💡 **Note**: If you rename an *External Asset Type*, you also need to go into the response rules to update the type.

5. Click **Delete** 🗑 next to the *Image Icon* to remove the image. Click the check box and select a new image.

6. Edit the list of external activities as needed:

   - To delete an activity, click an activity, then click **Delete** 🗑.

   - To rename an activity, double-click it, then type in a new name.

   - To add an activity to the list, click **Add** ➕, then rename the activity that appears.

7. Click **Save**.