Oracle Eloqua Profiler

User Guide

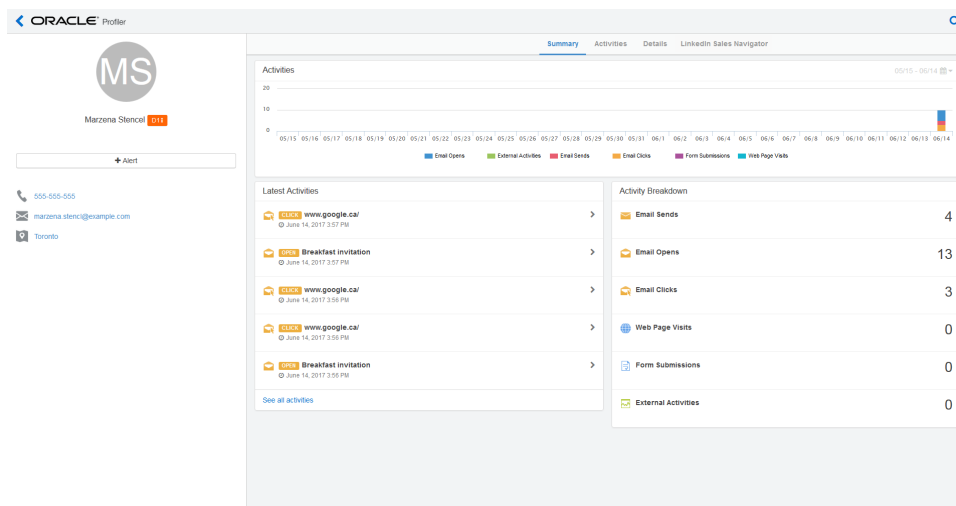# Contents

1 Profiler

Profiler is one of Oracle Eloqua's Sales Tools. It presents valuable information about contacts in an easily accessible and data-rich format that can be viewed on desktop computers, tablets, and mobile devices.

With Profiler you are able to view the contact details for a potential client, their activities, their lead score value, and so on. It is designed specifically for use with iOS and Android devices, giving marketers the option to access Oracle Eloqua's Profiler functionality from their mobile devices when they are on-the-go.

See examples of Profiler's responsive design on multiple devices (desktop, tablet, and mobile phone):

ORACLE Profiler

A1 i

MS

Marzena Stencel
CEO
Example.com

+ Alert   **& Full Profile**

Summary   Activities   Details   Extensi... ▼

Activities   05/16 - 06/15 📅 ▼

20

0
05/16   05/24   06/1   06/9

■ Email Opens   ■ External Activities
■ Email Sends   ■ Email Clicks
■ Form Submissions   ■ Web Page Visits

Latest Activities
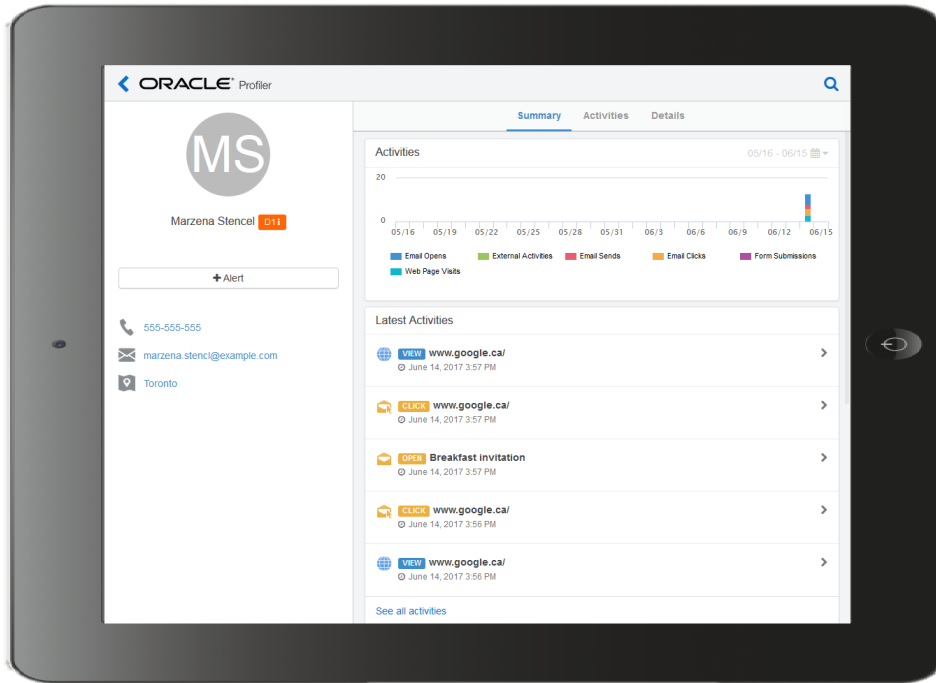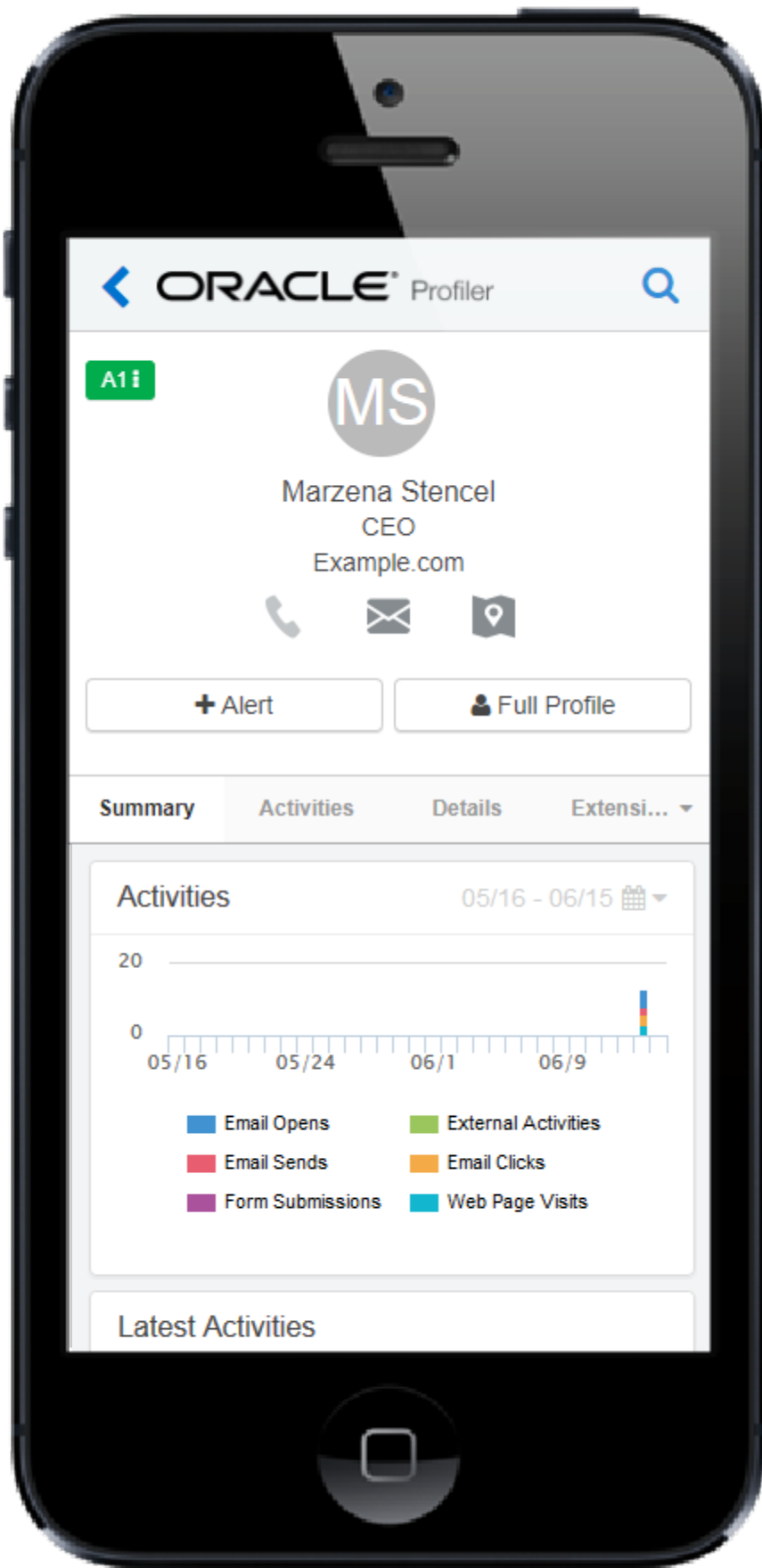
Learn more by watching this video: https://www.youtube.com/playlist?list=PLw7GyH-Hj8cPP6TQfGeDGUYv4Py9k_EwQ

> 💡 **Note**: Before you can access the responsive version of Profiler it must be installed in your Oracle Eloqua instance. Once installed, the customer administrator can customize the options that Profiler provides. Learn more about installing and configuring Profiler.

2 Installing Profiler

Before you can use Profiler you must install the app and configure the settings for your Eloqua instance.

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

To install the Profiler app:

1. Follow the Profiler installation URL provided:

   https://login.eloqua.com/?ReturnUrl=Apps/Cloud/Admin/Catalog/Add/512cc250-bf75-4b64-98c2-9ce3858a18e1/D3-01-E2-AB-6C-23-36-17-7C-B1-44-49-89-11-D0-C3

2. Log in with your Eloqua credentials, if required.

3. Click **Accept and Install** to add the app to your *Apps* list.'

4. Confirm your credentials and click **Sign In**.

5. Configure Profiler:

Profiler Global Settings

Web Alerts	☑ Allow creation of Web Alerts
	☑ Allow creation of Web Alerts by domain
Thumbnail Previews	☑ Show thumbnail previews
Search	☑ Allow search by first name, last name or email.
Subscriptions	☑ Show subscription status
External Activity	☑ Auto-Ext-Asset
	☑ Facebook
	☑ LinkedIn
	☑ Seminar
	☑ Tradeshow
	☑ WeChat
	☑ WebEx
	☑ Webinar
	☑ [YoutubeApp] Youtube Video Activity
	☑ 无标题外部资产类型

App Extensions

in ☑ LinkedIn Sales Navigator

Social Field Mappings

Facebook	Facebook ▼
Twitter	Twitter ▼
LinkedIn	LinkedIn ▼
Xing	Xing ▼

a. Select the check boxes next to the options that you want to enable for your instance.

> 💡 **Note**: Clearing the **Show Subscription Status** check box will hide the subscription status from the *Details* tab in Profiler.

> 💡 **Note**: Email preview is available for 120 days after the send date.

b. *App Extensions*: Enable the display of app extensions, such as LinkedIn Sales Navigator.

c. *Social Field Mappings*: To map the social fields that will appear in Profiler, select the field that corresponds with each social networking platform. Contacts may have more than one account in a single social networking site. The *Social Field Mappings* section allows you to specify from which account fields, personal or professional, Profiler should draw information.

d. Click **Save**.

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, modify the configuration settings, reinstall, or uninstall it. You can also check its status and dependencies.

You can change these configuration settings at any time. Learn more about reconfiguring Profiler.

3 Reconfiguring Profiler

The options that appear in Profiler depend on the settings that were selected when the app was installed. If you would like to reconfigure these settings, you must do so through the AppCloud catalog.

> ❶ **Important**: The configuration process must be done by a user with Client Administrator rights.

To reconfigure Profiler:

1. Log in to Oracle Eloqua.

2. Click **Settings** ⚙.

3. Click **Apps** in the *Platform Extensions* section.

4. Select the Profiler app.

5. Click **Configure** ⚙.

> ⚠ **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.

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6. Reconfigure the settings as needed.

Profiler Global Settings

Web Alerts	☑ Allow creation of Web Alerts
	☑ Allow creation of Web Alerts by domain
Thumbnail Previews	☑ Show thumbnail previews
Search	☑ Allow search by first name, last name or email.
Subscriptions	☑ Show subscription status
External Activity	☑ Auto-Ext-Asset
	☑ Facebook
	☑ LinkedIn
	☑ Seminar
	☑ Tradeshow
	☑ WeChat
	☑ WebEx
	☑ Webinar
	☑ [YoutubeApp] Youtube Video Activity
	☑ 无标题外部资产类型

Social Field Mappings

LinkedIn	LinkedIn ▾
Facebook	Facebook ▾
Twitter	Twitter ▾
Xing	Xing ▾

App Extensions

in ☑ LinkedIn Sales Navigator

a. Select the check boxes next to the options that you want to enable for your instance.

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    b. *App Extensions*: Enable the display of app extensions, such as LinkedIn Sales Navigator.

    c. *Social Field Mappings*: To map the social fields that will appear in Profiler, select the field that corresponds with each social networking platform. Contacts may have more than one account in a single social networking site. The *Social Field Mappings* section allows you to specify from which account fields, personal or professional, Profiler should draw information.

    d. Click **Save**.

7. Click **Save** to save your settings.

Your configuration settings have been updated. You can modify them at any time.

4 Accessing Profiler

> 💡 **Note**: Before you can access the responsive version of Profiler it must be installed in your Oracle Eloqua instance. Once installed, the customer administrator can customize the options that Profiler provides. Learn more about installing and configuring Profiler.

Profiler can be accessed in the following ways:

- **Direct**: `https://login.eloqua.com/apps/salesTools/profiler`

- **Autologin**: `https://login.eloqua.com/autoLogin?LoginPrefix={`*`Login_`* `Prefix`*`}&Url=/apps/salesTools/profiler`

- **SAML**: `https://login.eloqua.com/auth/saml2/autologin?LoginPrefix=` `{`*`Login_Prefix`*`}&ReturnUrl=/apps/salesTools/profiler`

- **SFDC IDP**: `https://{`*`podURL`*`}/sso/sfdc/v1/svp.aspx?LP={`*`Login_`* `Prefix`*`}&RU=/apps/salesTools/profiler`

  Replace {*`podURL`*} with the URL in your browser after you have logged in successfully to Eloqua (for example, `secure.p01.eloqua.com`). Click here for additional information about how to determine your POD.

  Login Prefix is a four-character code for the company name that you enter in the **Company** box on the login page. To add this parameter to your URL, enter LoginPrefix={*Login_Prefix*} where {*Login_Prefix*} is replaced with the four characters company name. You can obtain your company's login prefix in Eloqua by navigating to **Settings** > *Display Preferences* > **Company Defaults**.

You can also directly access a contact's record in Profiler using their email address. Simply add the following to the URLs above, and insert the contact's email address where needed: /contacts?emailAddress=[enter contact's email address]

> 👍 **Tip**: If you are using Microsoft Internet Explorer or Microsoft Edge to access the Oracle Eloqua sign in page in an iframe, an addition should be made to trusted sites. Add `https://*.eloqua.com` and the URL of the site where login page (Oracle Eloqua and/or Sales Tools) is being iframed. The browser must be closed fully and restarted before the change is recognized. For additional information, see this Topliners post about Oracle Eloqua login enhancements.

5 Accessing contact records in Profiler

Profiler allows you to view contact information on your mobile devices using a convenient and device friendly interface. When you log in to Profiler for the first time you will see a welcome message on the home page, this message informs you that you can search for contacts using a name or email address, as described below.
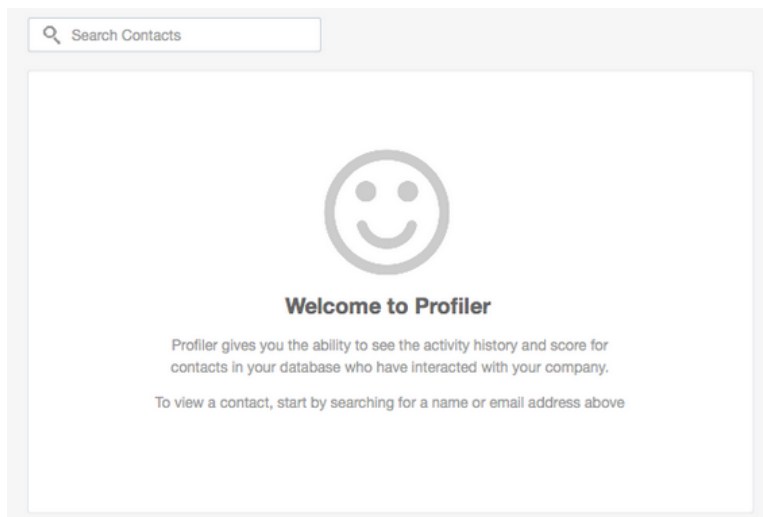
To search for a contact in Profiler:

1. Select the [icon] icon in the upper right-hand corner of the Profiler screen.

   > 💡 **Note**: You can also use the *Search Contacts* field that appears on the search page when you open the app.

2. Type a string of letters or numbers corresponding with a contact's *First Name*, *Last Name*, or *Email Address* field values into the *Search* bar. This search is not case-sensitive. The results

display a list of all contacts who have a matching contact field that *starts with* your search criteria.

> 📗 **Example**: A search for *Alex* displays users such as Alex, Alexandra, and Alexander.

3. (Optional) Filter your contacts:

   - Click **Filter** or the filter icon ▼ to open the filter. The filter displays on the right.

   - Enter a title, account, city, or domain to narrow your contact search, and click **Apply**.

   - Click the **X** next to a filter to remove it. To remove all filters, click **Clear**.

   > 💡 **Note**: Filtering shows users that match *all* of your filtering criteria (using an **AND** operator).

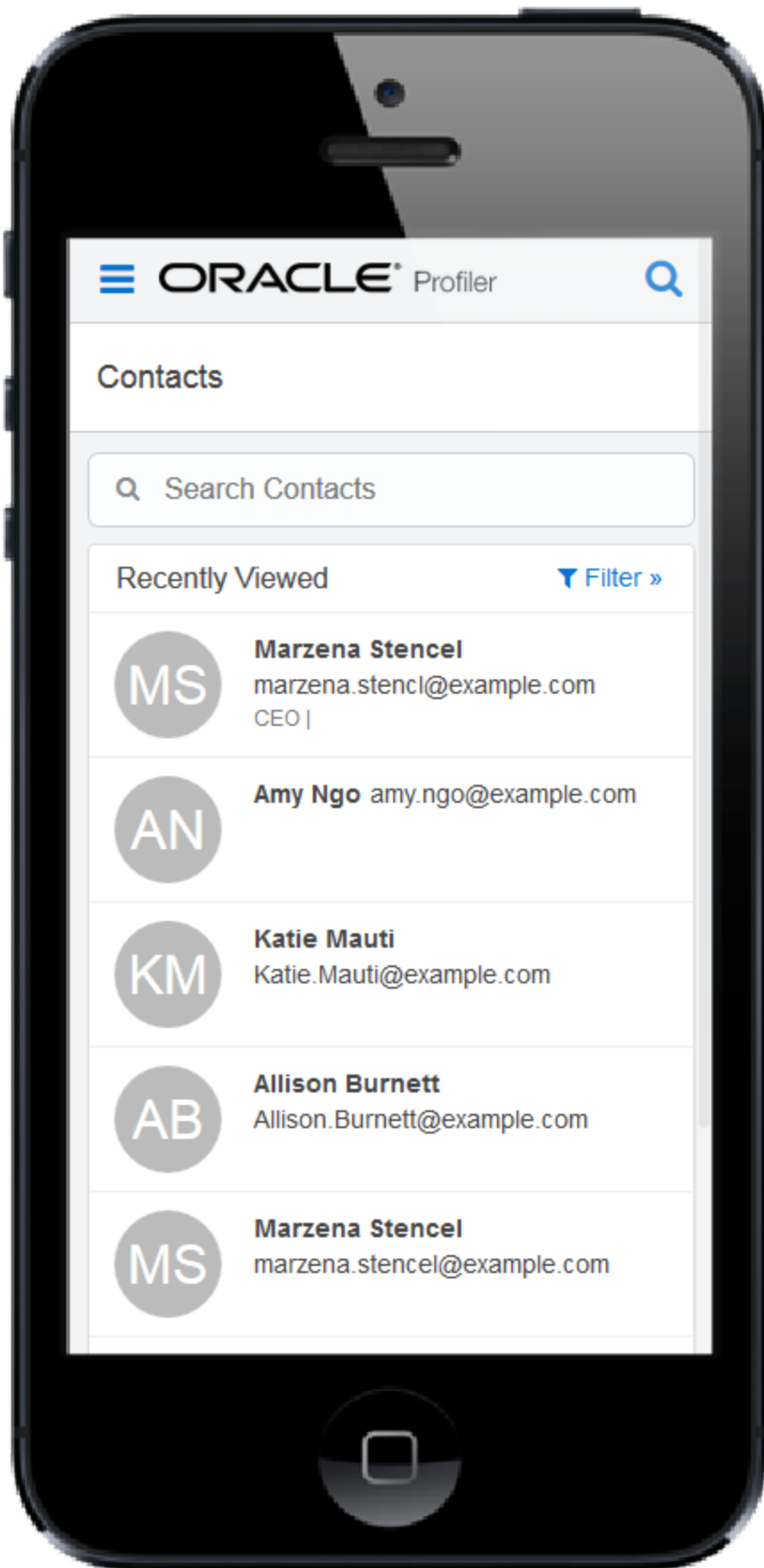   Example of filtering by *example.com* domain:
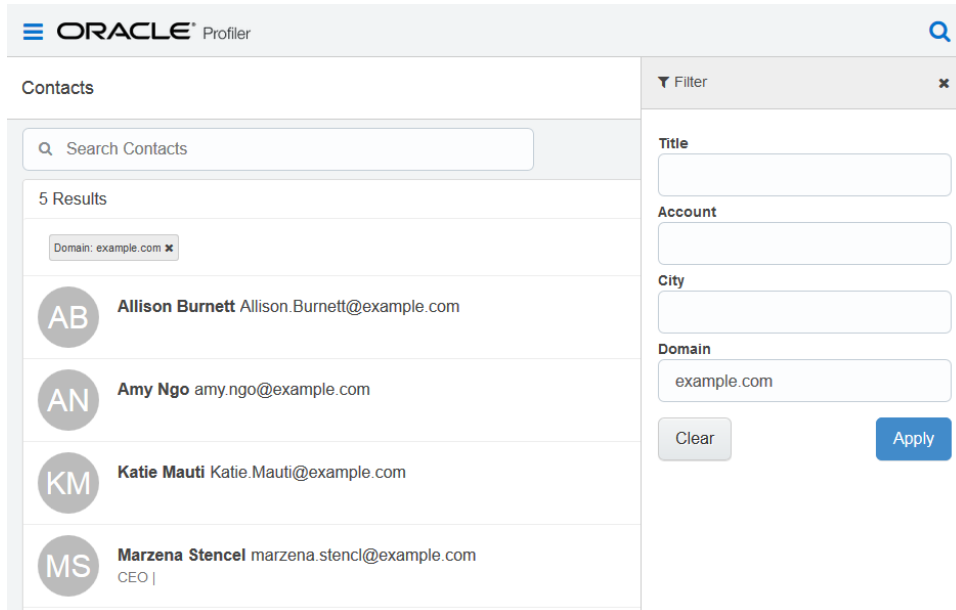
The example below shows filtering by domain of *example.com* and title of *CEO*. The results display all users who match both of these criteria. Users who have *CEO* as the title, but a different domain will not appear.
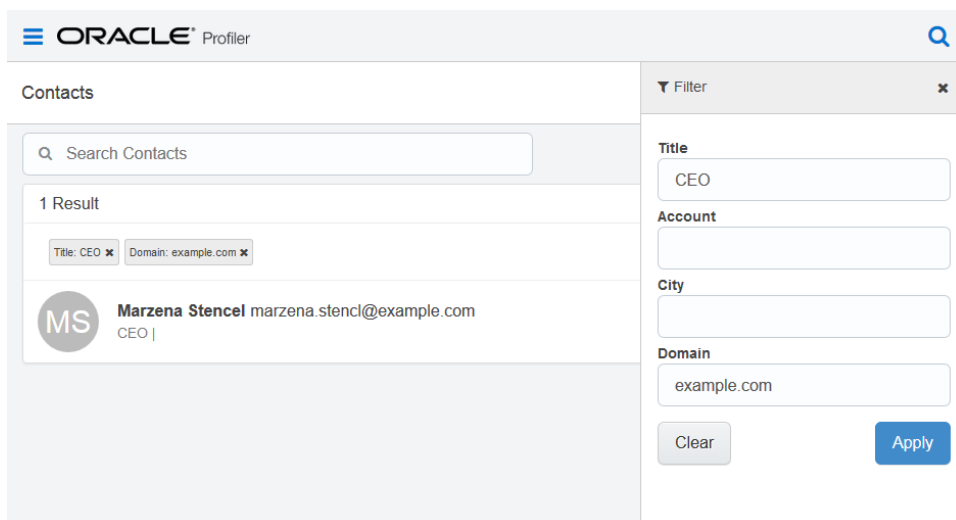
4. Select the name of the correct contact from the list. Their contact record opens displaying their details and activities. Learn more about the information provided in Profiler.

After your first visit to Profiler, a recently-viewed contacts list is displayed on the homepage. This convenient list makes it easier to locate the contacts that you may be

dealing with on a regular basis, or with whom you are attempting to establish a connection. From this recently viewed list you can select the contact's name and you are taken directly to their contact record.

ORACLE® Profiler

Contacts

Search Contacts

Recently Viewed   ▼ Filter »

MS — **Marzena Stencel**
marzena.stencl@example.com
CEO |

AN — **Amy Ngo** amy.ngo@example.com

KM — **Katie Mauti**
Katie.Mauti@example.com

AB — **Allison Burnett**
Allison.Burnett@example.com

MS — **Marzena Stencel**
marzena.stencel@example.com

6 Viewing data in Profiler

When you open a contact record in Profiler, that contact's email address is displayed along with any other fields your administrator has given you access to.
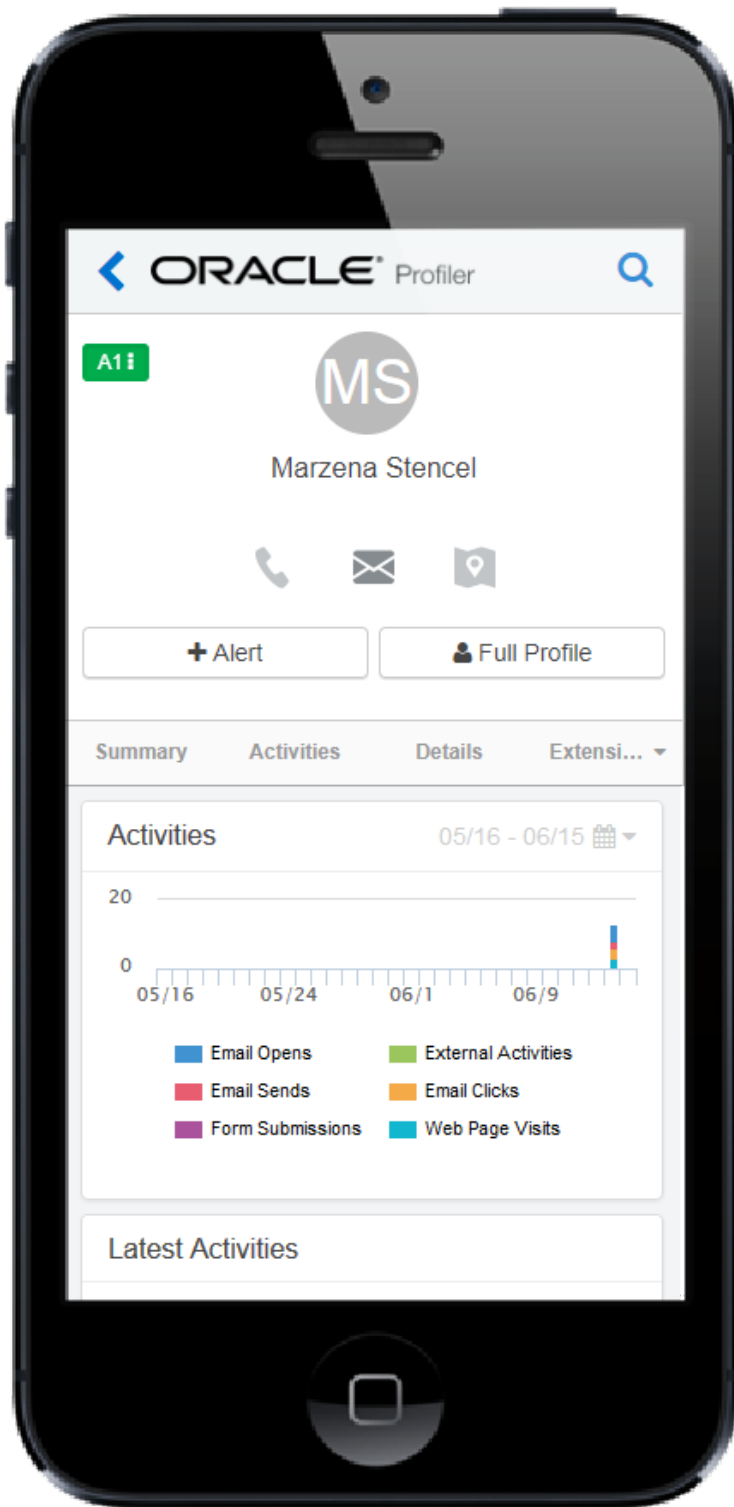
You are also provided with a number of icons that make it easier for you to reach out to a contact:

- **Call the contact**.

- **Reach out to the contact via email**. Clicking this icon or a contact's email address opens one of the following depending on where you are using Engage:

  - **Web Engage**: Clicking the icon or a contact's email address in Profiler will open a *Compose* window in Engage.

  - **Oracle Eloqua Sales Tools for Microsoft Outlook**: If you access Profiler in Oracle Eloqua Sales Tools for Microsoft Outlook, clicking the icon or a contact's email address opens a new compose window in Microsoft Outlook. All emails within Outlook are tracked and will adhere to contact validation rules.

- **Bounced back or unsubscribed**. This icon indicates that you cannot send a message to this contact, because email bounced back or the contact is globally unsubscribed.

- **Locate the contact using Google Maps**.

Contact data is provided under three tabs in Profiler, each of these tabs provide different useful information that is easy to understand and navigate. With the contact record open in Profiler, select the corresponding tab to access the information described below.

6.1 Summary

This tab presents the contact's activities in the following ways:

- **Activities**: This is a graphical representation of all the contact's activities within a specific date range. You can use the calendar icon in the upper right-hand corner of the graph to change the date range, select 30 days, 6 months, or 1 year as needed. The bars in the graph are

broken down to categorize the types of activity that occurred, for example, how many times the contact opened or clicked an email. You can filter the results by selecting which activity types appear in the graph. By default, all activity types are shown, tap or click the activity type label below the graph to hide the corresponding data. You can also view the full activity details for each bar on the graph, simply tap or click an individual bar and the *Activities* tab opens displaying the included activities in detail.
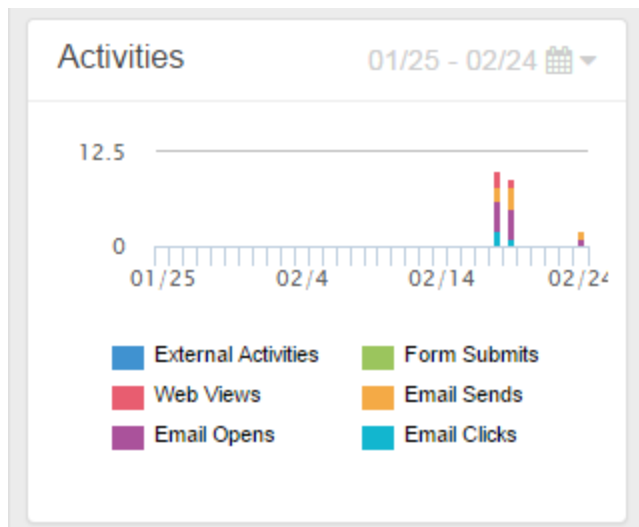
- **Latest Activities**: This section shows the contact's most recent activities. From here you can view a preview of each email or web page that the contact interacted with. This can give you a good idea about the contact's interests.

- **Activity Breakdown**: This section provides a breakdown of the contacts activities, these are the same categories that are represented in the activities graph. The activities are grouped based on type. You can select any of the categories and all relevant activities open in the *Activities* tab, where you can view more details.

  Activities are grouped in the following way:

  - **Emails Sends**: The number of emails sent to this contact.

  - **Emails Opens**: The number of times emails were opened by the contact.

  - **Emails Clicks**: The number of times that links in an email were clicked.

- **Web Page Visits**: Visits to tracked web pages.

- **Form Submissions**: Number of forms that were submitted by the contact.

- **External Activities**: Data captured for the contact's non-Eloqua (external) activities, such as attending a webinar, trade show, and so on.

6.2 Activities

This tab shows you all of the contact's activities, all events (email sent, email open and so on) are listed with the time and date on which they occurred. Here you can select any event and a thumbnail image will open (if the thumbnails option is enabled), or select **Preview** to see the email, form, and so on in more detail. If you want to search for specific events in the contact's record, you can do so using the search field located under the *Activities* tab. To view the activities from a specific date, select **Filter** ▼ Filter and enter a date in the *Go To Date* field, then select **Apply Filter** to filter the results.

> ♀ **Note**: Email preview is available for 120 days after the send date.

6.3 Details

This tab provides you with the contact's details. Contact fields vary depending on your security group settings in Oracle Eloqua and the views your administrator has given you access to. Select the desired view from the *View* list.
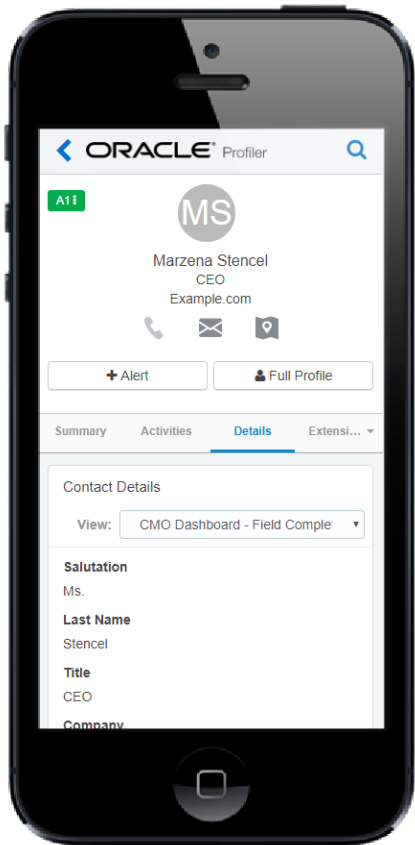
If messages to this contact have bounced back or the contact is globally unsubscribed, the following icon is displayed next to the email address:

| Summary | Activities | **Details** | LinkedIn Sales Navigator |

Address 2
Not Available

City
Not Available

State or Province
Not Available

Zip or Postal Code
Not Available

Title
Mr.

Title - Standard
Other

Country
Not Available

Email Address
❌ ro█████████mail.com (**Bounceback**)

SFDC EmailOptOut
0

‹ **ORACLE**® Profiler **🔍**

D4 **⋮**

SE

Sean Eidemiller

📞 ✉❌ 📍

➕ Alert   **👤 Full Profile**

| Summary | Activities | **Details** |

Contact Details

View: Automation_View ⬍

Email Address

6.4 Extensions

This tab provides you with access to the contact's LinkedIn Sales Navigator information and will host additional social networks in the future.

7 Adjusting the lead score model

A lead score value is displayed for each contact in Profiler. This value is based on the lead scoring models configured in your Oracle Eloqua instance. You can customize which models appear for Profiler users by adjusting the permissions settings in Oracle Eloqua. Learn more about lead scoring

To change the lead scoring model used in Profiler:

1. With a contact profile open, click the lead score icon to the right of the contact's name. A list opens displaying the available lead scoring models.
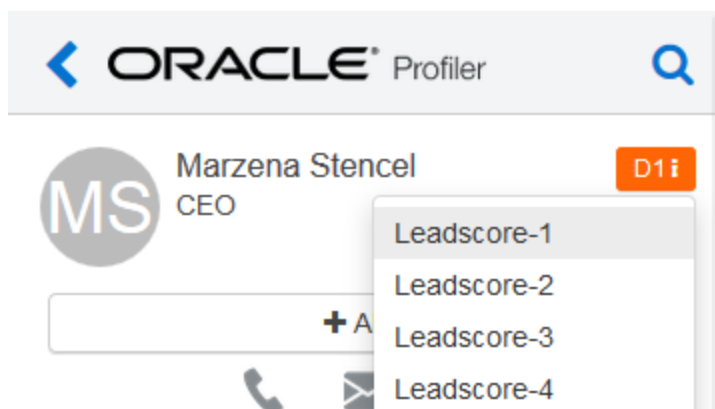
2. Select a new lead scoring model from the list. The new model is applied to the record and the lead score icon is updated to reflect the change.

> **ⓘ Important**: When you change the lead scoring model for a contact, the selected model is saved as your default model. All subsequent profiles that you view use the selected lead scoring model.
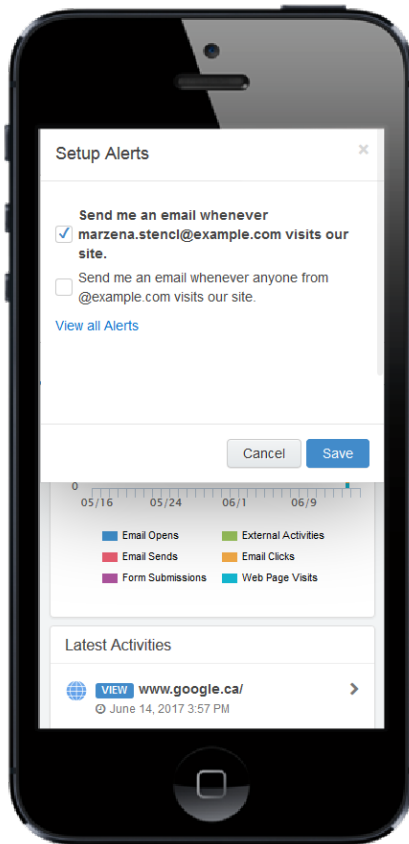
8 Setting up activity notifications

The Profiler *Web Alert* function allows you to set up alerts that will inform you each time a contact, or anyone from the same domain visits your website. As a Profiler user, you are able to configure this setting on a per-contact basis. The web alerts function is very useful as it provides you with the opportunity to follow-up with contacts after they have expressed interest in your product or materials by visiting your website.

> 💡 **Note**: The web alert function must be enabled for Profiler when the app is installed. If it was not enabled, you can reconfigure the app in the *Apps* area.

To set up web alerts in Profiler:

1. Open the profile for the contact for whom you wish to set up notifications.

2. Select the **+Alert** button below the contact's name, the *Setup Alerts* window opens.

3. Select or clear the check boxes to specify in which cases you want to be notified.

4. Select **Save**, the window closes and your web alert preferences are saved for this contact. You will be sent a notification email informing you of the contacts activities according to the settings you configured above. When you select **This Contact's Activity** (in the notification email), Profiler opens to the contact's *Activities* tab where the referenced activity is displayed.

ORACLE | eloqua

Website Activity Notification

Your personal notification of activity on your website. Target prospects, identify visitors, and develop sales relationships with your online visitors. Log on to Eloqua to configure your notifications to send text emails)

A visitor with the following details has visited your website:

Notification Name Prospect Profiler: Marzena.Stencel for: marzena.stencl@example.com

First Name:	Marzena
Last Name:	Stencel
Email Address:	marzena.stencl@example.com
Company:	Example Co.
Pages Viewed:	5

First Name:	Marzena
Last Name:	Stencel
Email Address:	marzena.stencl@example.com
Company:	Example Co.
Phone Number:	555-555-5555
Total Visits:	1
Total Pages:	1
Last Visit:	
Salesperson:	

View This Contact's Activity

CONNECT WITH US. 📘 🐦 🇬 💼 ▶️

9 Viewing web alerts

Using Engageand Profiler, you can view a list of the web alerts you are subscribed to.
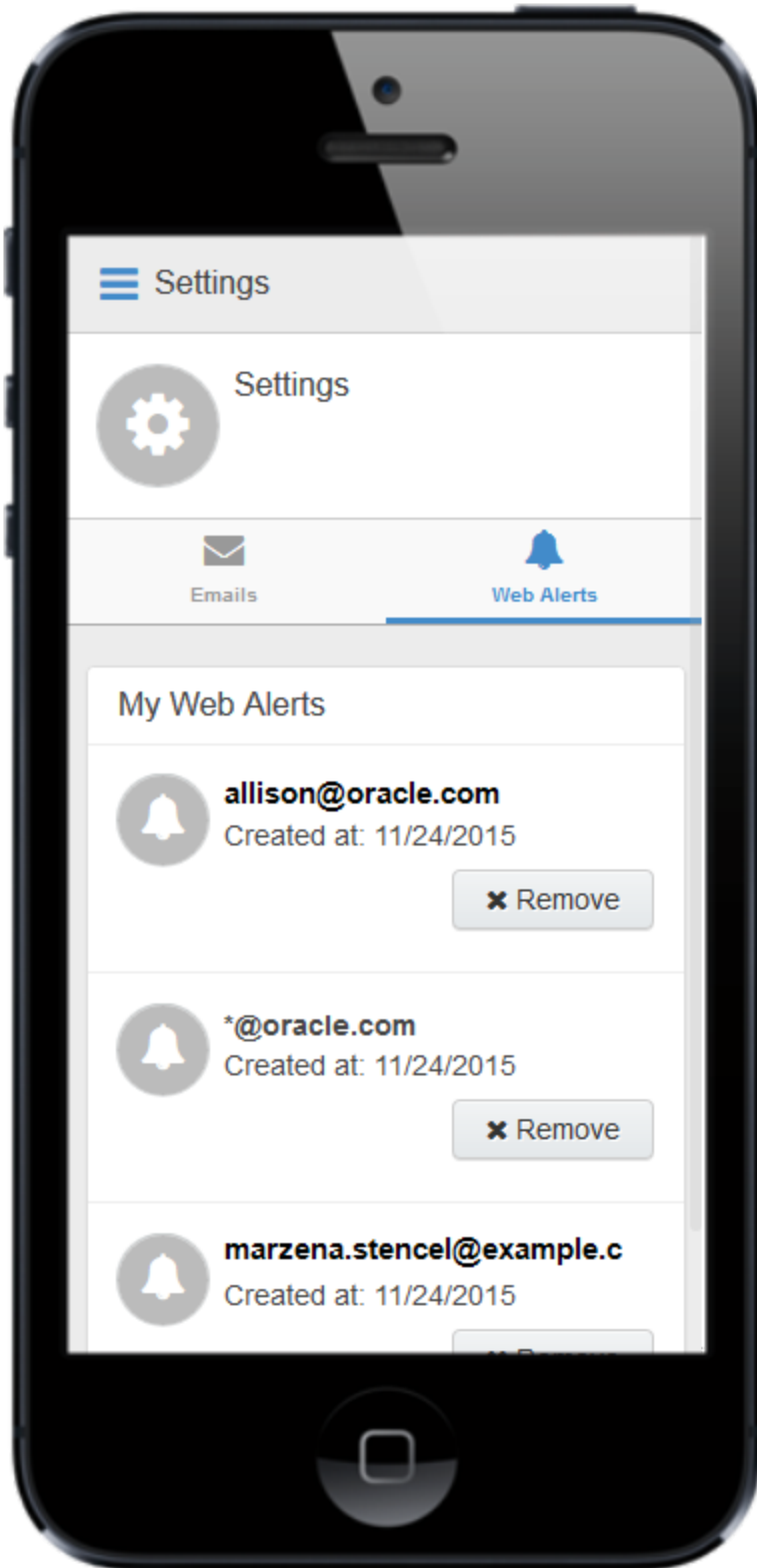
> ⏻ **Note**: Web alerts are displayed if you have a Profiler license.

To view web alerts:

1. Click *Settings* .

2. Select the **Web Alerts** tab.

Your existing web alerts are displayed. You can remove any web alerts you no longer want to receive by clicking **Remove**.

10 Accessing LinkedIn Sales Navigator

LinkedIn Sales Navigator is a business solution offered by LinkedIn to help sales users target buyers, understand key insights, and engage with prospects. It can be accessed when viewing a contact record in Profiler, next to the *Details* tab. Profiler searches for a match in LinkedIn based on the Oracle Eloqua contact's first name, last name, and company name.

Visit LinkedIn's Sales Solutions site to learn more about LinkedIn Sales Navigator.
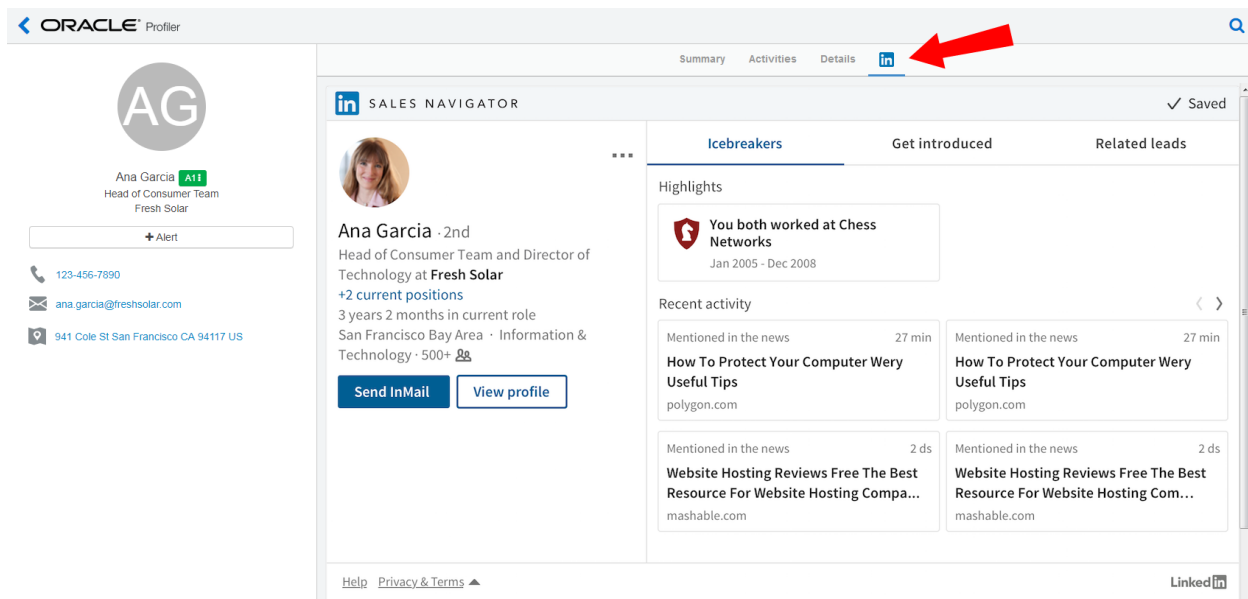
Prerequisites

- A *Team* or *Enterprise* LinkedIn Sales Navigator license is required. Learn more about LinkedIn's Sales Navigator plans.

- The LinkedIn Sales Navigator app extension must be enabled in Profiler Global Settings.

- Your own LinkedIn account for logging in via Profiler

> ⓘ **Important**: To request access to this feature, please log in to My Oracle Support (https://support.oracle.com) and create a service request.

To access LinkedIn Sales Navigator in Profiler:

1. Follow the installation URL provided by My Oracle Support (https://support.oracle.com).

2. Follow the on-screen installation instructions.

3. Open Profiler.

4. Open a contact record.

5. Click the LinkedIn Sales Navigator tab ![in] . A sign in screen is displayed if you are not already logged in to LinkedIn via your LinkedIn account. If you are already logged in, the LinkedIn profile information loads automatically.

You can now access LinkedIn Sales Navigator in Profiler.

11 Profiler integration

Profiler can be embedded in several customer relationship management (CRM) systems, including Oracle Sales Cloud, CRM onDemand, and Salesforce. This integration makes it easier and more convenient for you to access the sales tool from within your chosen system.

> 💡 **Note**: If you already have an older version of Profiler embedded in a CRM, you must replace the login URL.

11.1 Adding a Profiler link to Oracle Sales Cloud

There are two main steps that you must follow to add a Profiler link to your Sales Cloud account:

1. Create a Profiler link

2. Add the link to a layout

Step 1: Creating a Profiler link.

To create a Profiler link:

1. Login with your Administrator credentials.

2. Click the **Navigator** icon, then under *Tools* click **Customization** > **Application Composer**.

3. In the left-side pane, select **Marketing** from the *Application* drop-down list.

4. Expand **Objects** > **Standard Objects** > **Sales Lead Contacts**, then select **Actions and Links**.

5. Click *Create* [icon] to create a link, then enter the following information:

- **Display Label**: Profiler

- **Name**: Eloqua_Profiler

- **Type**: Select *Link*

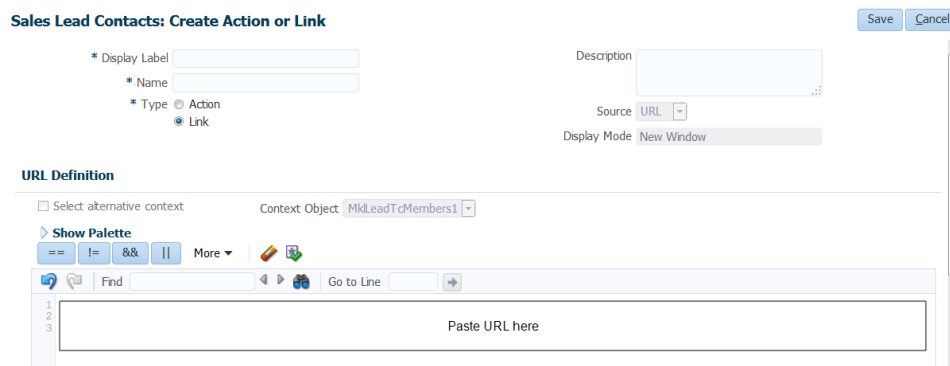- **URL Definition**: Enter one of the following URLs:

Direct:

def URL="https://login.eloqua.com/apps/salesTools/profiler?emailAddress=" + nvl(PrimaryEmailAddress,"")

Auto-login:

def URL="https://login.eloqua.com/autoLogin?LoginPrefix=<Login Prefix>&Url=/apps/salesTools/profiler?emailAddress=" + nvl(PrimaryEmailAddress,"")

SAML:

def URL="https://login.eloqua.com/auth/saml2/autologin?LoginPrefix=<Login Prefix>&ReturnUrl=/apps/salesTools/profiler?emailAddress= " + nvl(PrimaryEmailAddress,"")

Note: Replace LoginPrefix=<LoginPrefix> where prefix is a 4 character identifying code like 'ELQA'. You can alternatively use <siteID> with your site ID - a numeric code,

like '33' (it may be much longer). If you do not know what your prefix is, log a Service Request ("SR") via My Oracle Support (support.oracle.com). You can also choose to ignore this parameter and it will attempt to log you in using the first Eloqua saved credential it finds.

6. Click *Validate* to validate the script.

7. Click **Save**.

Step 2: Adding the Profiler link to layouts

To add the Profiler link to a layout:

1. In *Application Composer* left-side menu, locate the object used in step 1, then click **Pages**.

2. Under the *Details Page Layouts* section, select the layout to which you want to add the link, then click *Edit* .

3. Click the *Edit* icon next to *Contact Overview Form*.

4. Under the *Available Fields* column, select the Profiler link that you created then click the

   arrow to move the link to the *Selected Fields* column.

5. Adjust the link's location on the list using the up and down arrows next to the list, then click **Save and Close**.

When you open to a customer you will see the Profiler link.
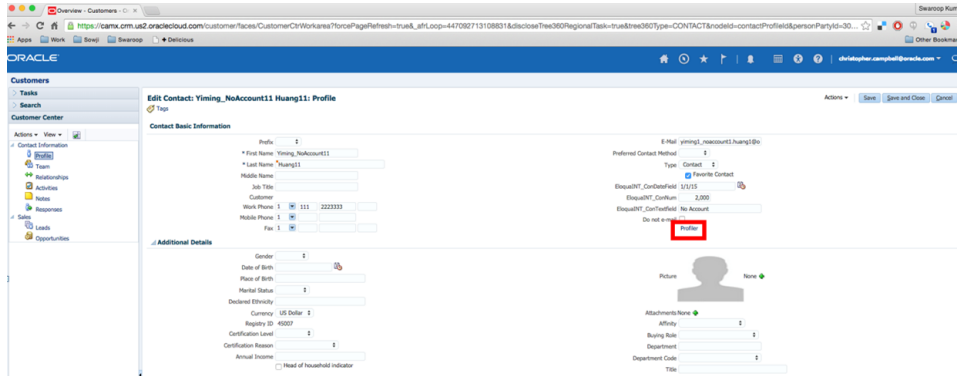
11.2 Embedding Profiler in CRM onDemand

When embedding Profiler in CRM onDemand, there are two main steps that you must follow:

1. Create a web applet

2. Add the web applet to a page layout

> 💡 **Note**: You will need to create two applets- one for leads and one for contacts. The instructions below are for Contacts but you can follow the same procedure for Leads.

Step 1: Creating a web applet for contact and leads

To create a web applet:

1. Login to CRM onDemand with your Administrator credentials.

2. Navigate to **User** > **Configure** > **Admin**.
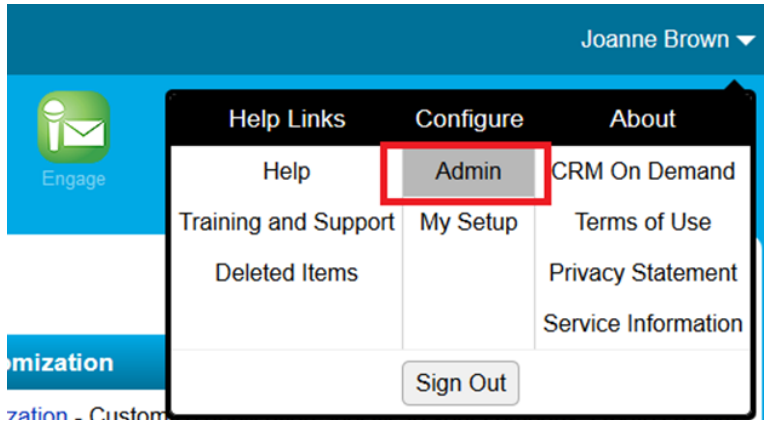
3. Click **Application Customization**.

4. Under *Record Type Setup*, click **Contact**.

5. Under *Pay Layout Management*, click **Contact Web Applet**, then enter the information below:

- **Name**: Enter a name. (Example: *Contact Profiler*)

- **Location**: Select *Detail Page*

- **Type**: Select *URL*

- **URL**: Enter one off the following URLs

    - **Direct**: https://login.eloqua.com/apps/salesTools/profiler?emailAddress%3D%%%Email_ Address%%%

    - **Auto-login**: https://login.eloqua.com/autoLogin?LoginPrefix=<Login Prefix>&Url=/apps/salesTools/profiler?emailAddress%3D%%%Email_Address%%%

    - **SAML**: https://login.eloqua.com/auth/saml2/autologin?LoginPrefix=<Login Prefix>&ReturnUrl=/apps/salesTools/profiler?emailAddress%3D%%%Email_Address%%%

- **Height**: Enter *800*
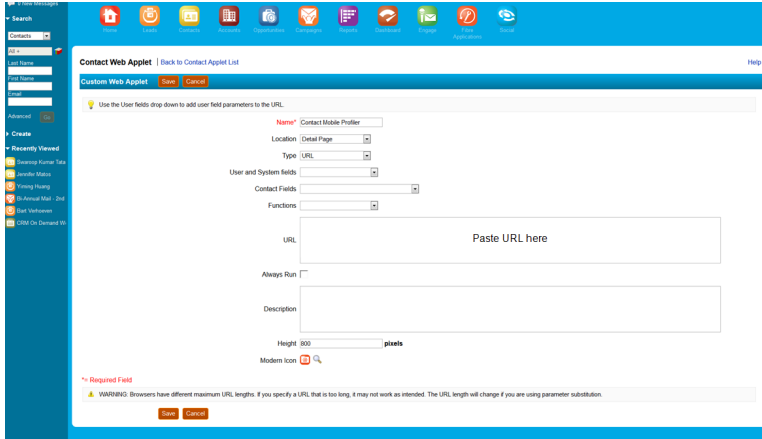
6. Click **Save**.

Step 2: Adding webs applet to page layouts

To add an applet to a page layout

1. Navigate to **User** > **Configure** > **Admin**.

2. Click **Application Customization**.

3. Under *Page Layout Management*, click **Contact Page Layout**.

4. Choose the page layout that you want to modify

> 💡 **Note**: It is not necessary to configure Steps 2 or 3. Click Step 4 (Related Information) to continue.

5. In the *Not Available Information* column, locate the web applet that you created, then highlight it (single left-click) and click the **>** arrow to move it to the *Available Information* column.

6. Select the applet in the *Available Information* column, then click the **>** arrow to move it to the

Displayed Information column.

7. Click **Finish**.

> ℹ **Important**: Repeat the above steps for Leads

Embedding Profiler in Microsoft Dynamics 2016

11.3 Embedding Profiler in Microsoft Dynamics 2013

Profiler can be embedded in Microsoft Dynamics.

To install Profiler in Dynamics:

1. Navigate to **Settings** > **Customization** > **Customizations** > **Customize the System**

2. Select **Entities** > **Contact** > **Forms**

3. Double-click the form you want to add Profiler to (example, 'Main').

4. Click **Insert** in the top menu.

5. Add a *One Column Tab*. Name it whatever you like.

6. Add an IFRAME to this tab.
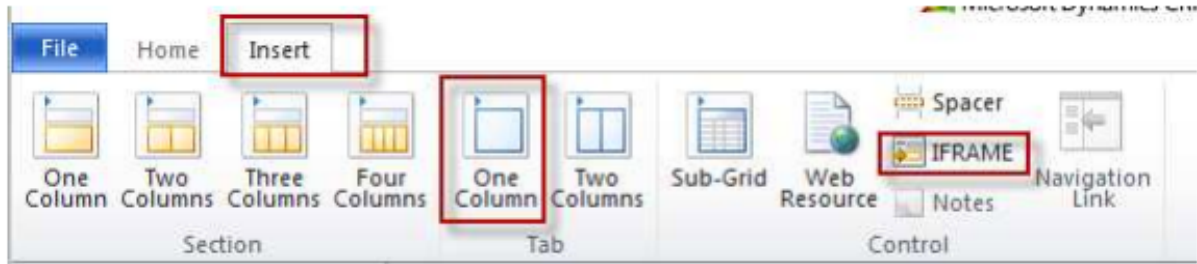
    a. *Name*: IFRAME_Profiler

    b. *URL*: http://about:blank

    c. *Label*: Eloqua Profiler

    d. Ensure that *Restrict cross-frame scripting* is unchecked

7. Select the *Formatting* tab. Modify the height by setting the number of rows (try 20).

8. Select the *Dependencies* tab. Add email as a dependent field.

9. Click **OK** to close the IFRAME window.

10. On the *Form* model, click **Form Properties**.

11. Click the *Events* tab.

12. Under Form Libraries, click **Add** and then click **New**.

    a. *Name*: new_EPPOnLoad

    b. *Type*: Script (JScript)

    c. Click **Save** and **Close**

13. Now double-click on the newly created Form Library **new_EPPOnLoad**.

14. In the *Text Editor* copy and paste one of the following code snippets (depending on your login choice).

    a. Direct Login

    var newUrl = "https://login.eloqua.com/apps/salesTools/profiler?emailAddress=" +
    document.getElementById("emailaddress1").title;
    Xrm.Page.ui.controls.get("IFRAME_Profiler").setSrc(newUrl);

b. Auto-Login

```
var newUrl = "https://login.eloqua.com/autoLogin?LoginPrefix=<Login
Prefix>&Url=/apps/salesTools/profiler?emailAddress="+ document.getElementById
("emailaddress1").title;
Xrm.Page.ui.controls.get("IFRAME_Profiler").setSrc(newUrl);
```

c. SAML SSO

```
var newUrl = "https://login.eloqua.com/auth/saml2/autologin?LoginPrefix=<Login
Prefix>&ReturnUrl=/apps/salesTools/profiler?emailAddress="+ document.getElementById
("emailaddress1").title;
Xrm.Page.ui.controls.get("IFRAME_Profiler").setSrc(newUrl);
```

> 💡 **Note**: Replace LoginPrefix=<LoginPrefix> where prefix is a 4 character identifying code like 'ELQA'. You can alternatively use <siteID> with your site ID - a numeric code, like '33' (it may be much longer). If you do not know what your prefix is, log a Service Request ("SR") via My Oracle Support (support.oracle.com). You can also choose to ignore this parameter and it will attempt to log you in using the first Eloqua saved credential it finds.

15. Click **Save** and click on the newly created library.

16. Click **OK**

17. Click **Save**

18. **Publish** the Model.

19. Repeat for the *Leads* entity, if desired.

> ⓘ **Important**: If the IFRAME window appears blank, in Dynamics, navigate to **Settings** > **Administration** > **System Settings** > **General**, and change the setting for *Use legacy form rendering* to **Yes**. Dynamics will then render the Profiler IFRAME correctly.

11.4 Embedding Profiler in Microsoft Dynamics 2016

Profiler can be embedded in Microsoft Dynamics.

To install Profiler in Dynamics:

1. Navigate to **Menu** > **Settings** > **Customization** > **Customizations** > **Customize the System**.

2. Under *Components*, select **Entities** > **Contact** > **Forms**.

3. Click **New**, then select the form you want to add Profiler to (example, 'Main').

4. Click the **Insert** tab in the top menu.

5. Add a *One Column Tab*. Name it whatever you like by double-clicking on the new tab. Close the tab when you're finished

6. Add an IFRAME to this tab.
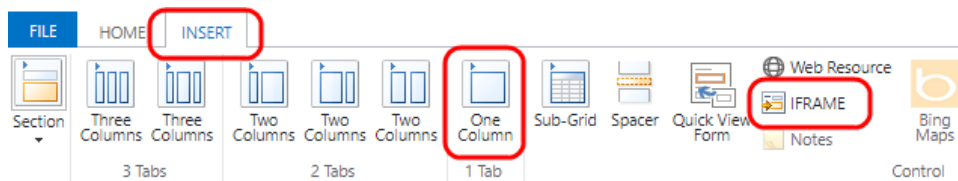
   a. *Name*: IFRAME_Profiler

   b. *URL*: http://about:blank

   c. *Label*: Eloqua Profiler

   d. Ensure that *Restrict cross-frame scripting* is unchecked

7. Click the **Formatting** tab. Modify the height by setting the number of rows (try 20).

8. Click the **Dependencies** tab. Add email as a dependent field.

9. Click **OK** to close the IFRAME window.

10. Click the **Home** tab, then click **Form Properties** in the *Form* section.

11. Under *Form Libraries*, click **Add**, then click **New**.

    a. *Name*: new_EPPOnLoad

    b. *Type*: Script (JScript)

    c. Click the **Text Editor** button that appears.

12. In the Text Editor, copy and paste the following string: function loadProfiler() {

13. Copy and paste one of the following code snippets (depending on your login choice).

    a. Direct Login

       var newUrl = "https://login.eloqua.com/apps/salesTools/profiler?emailAddress=" +
       document.getElementById("emailaddress1").title;
       Xrm.Page.ui.controls.get("IFRAME_Profiler").setSrc(newUrl);

    b. Auto-Login

       var newUrl = "https://login.eloqua.com/autoLogin?LoginPrefix=<Login
       Prefix>&Url=/apps/salesTools/profiler?emailAddress="+ document.getElementById
       ("emailaddress1").title;
       Xrm.Page.ui.controls.get("IFRAME_Profiler").setSrc(newUrl);

    c. SAML SSO

       var newUrl = "https://login.eloqua.com/auth/saml2/autologin?LoginPrefix=<Login
       Prefix>&ReturnUrl=/apps/salesTools/profiler?emailAddress="+ document.getElementById
       ("emailaddress1").title;
       Xrm.Page.ui.controls.get("IFRAME_Profiler").setSrc(newUrl);

14. Be sure to close everything with a final "}". If you've chosen Auto-Login, your code would look something like this:

```
function loadProfiler() {
var newUrl =
```

```
"https://login.eloqua.com/autoLogin?LoginPrefix=ELQA&Url=/apps
/salesTools/profiler?emailAddress="+ document.getElementById
("emailaddress1").title;
Xrm.Page.ui.controls.get("IFRAME_Profiler").setSrc(newUrl);
}
```

> ♀ **Note**: Replace LoginPrefix=<LoginPrefix> where prefix is a 4 character identifying code like 'ELQA'. You can alternatively use <siteID> with your site ID - a numeric code, like '33' (it may be much longer). If you do not know what your prefix is, log a Service Request ("SR") via My Oracle Support (support.oracle.com). You can also choose to ignore this parameter and it will attempt to log you in using the first Eloqua saved credential it finds.

15. Click **OK** to close the Text Editor.

16. Click **Save**, then click **Publish**. Close this window.

17. Close the *Look Up Record* window.

18. Under *Event Handlers*, click **Add**.

19. Select the new function you created from the drop-down, then name it.

20. Click **OK**.
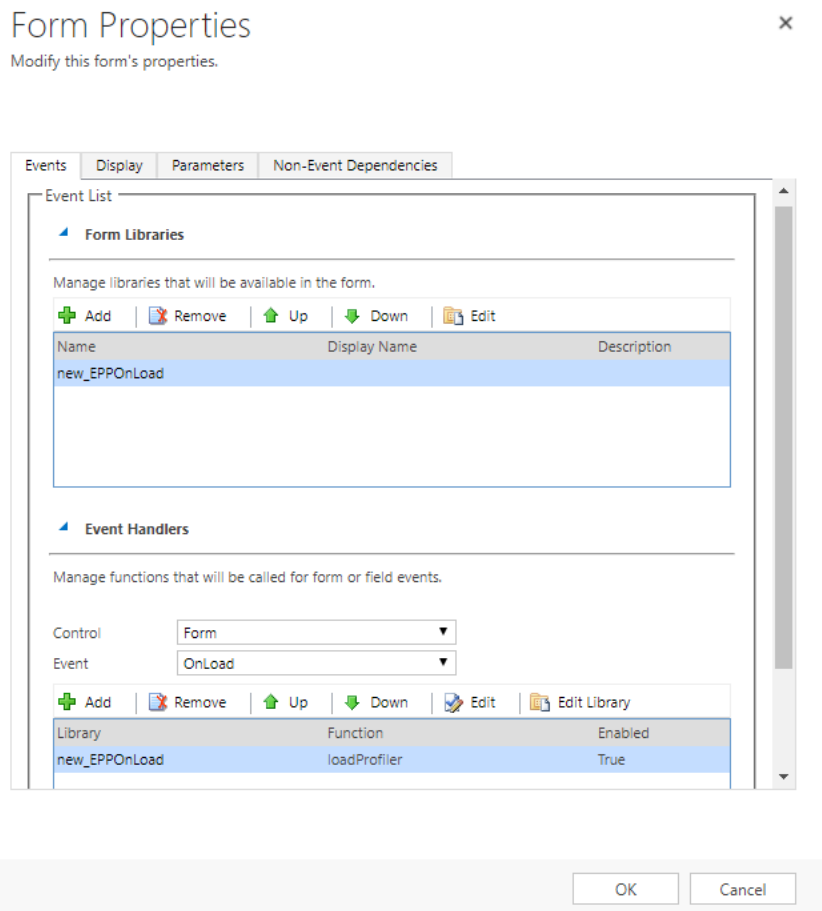
21. Click **OK** in the *Form Properties* window.

22. Click **Save**, then click **Publish** on your form.

23. Repeat for the *Leads* entity if desired.

> ⓘ **Important**: If the IFRAME window appears blank, in Dynamics, navigate to **Settings** > **Administration** > **System Settings** > **General**, and change the setting for *Use legacy form rendering* to **Yes**. Dynamics will then render the Profiler IFRAME correctly.

11.5 Embedding Profiler in Salesforce

The users that can see Eloqua Profiler in your CRM system are dependent on the views/layouts you have set up in your CRM system and on which of those views/layouts you insert the Eloqua Profiler component.
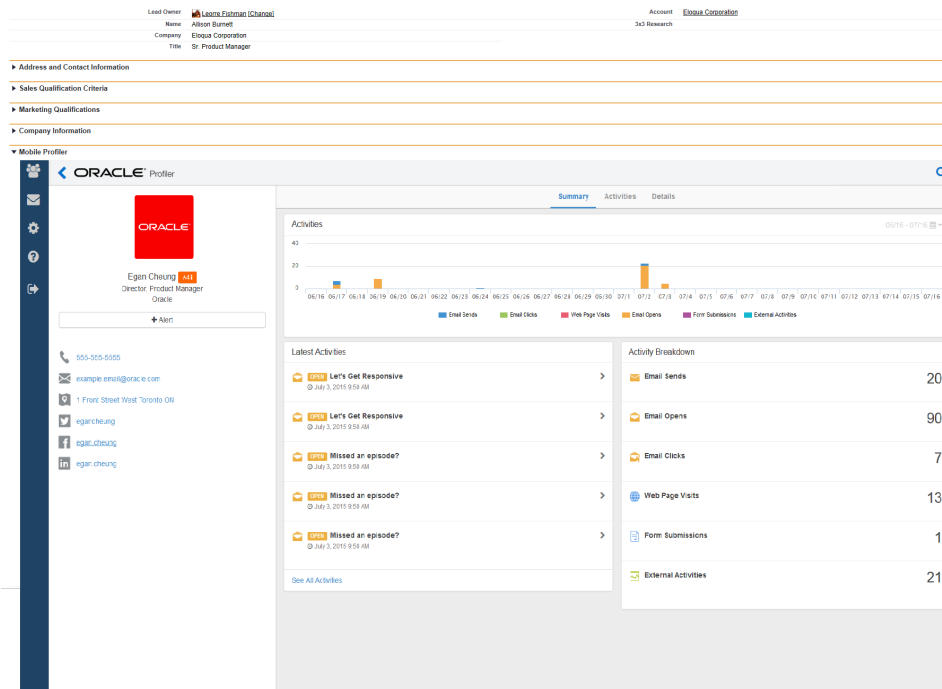
> 💡 **Note**: If you want to test Eloqua Profiler without making it available to your entire sales or marketing team, you should assign yourself a contact/lead view to which nobody else has access and then add Eloqua Profiler to that view.

There are three main steps you must follow when installing Profiler using Visualforce:

1. Create a Visualforce page for contacts and leads

2. Adjust security for Visualforce pages

3. Add Visualforce pages to contact and lead layouts

Step 1: Creating a Visualforce page for contacts and leads

You will need to create two (2) Visualforce pages - one for leads and one for contacts. Then you will be editing your existing Contact and Lead views by inserting the appropriate Visualforce pages into their corresponding views. Below, we will cover the installation for a Lead view, however the steps required for a Contact view are mostly the same but for a few minor text items noted below.

To create a Visualforce page:

1. Log into your Salesforce.com account using your administrator credentials, then navigate to **Setup** in the upper right-hand corner of the screen.

2. Navigate to **Develop** (under *Build* section) > **Visualforce Pages** > **New**.
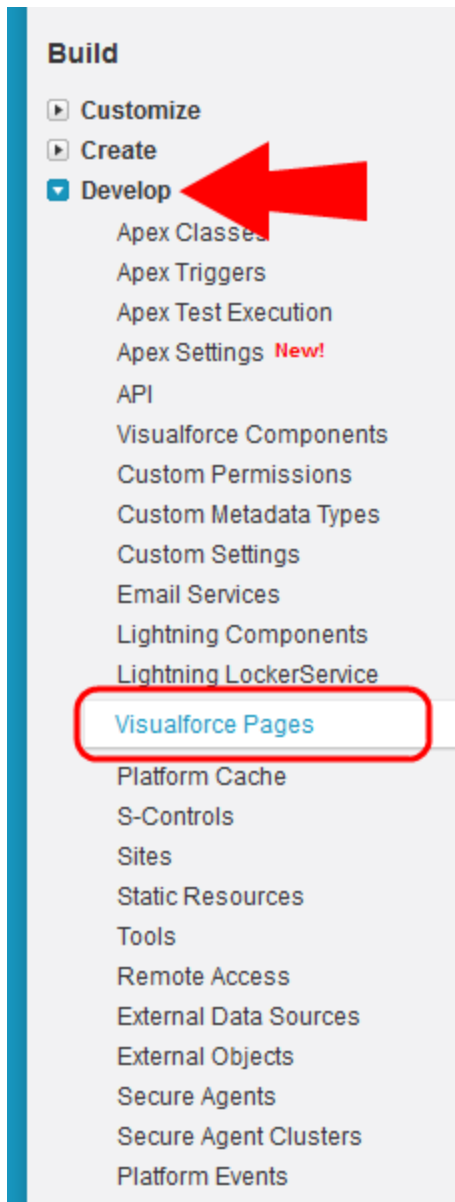
3. Provide a Label and a Name for the Visualforce page.

💡 Note: These items will only be used when managing layouts and sections and will not be visible by users simply reviewing a lead record. The name can be whatever you want but it must contain only alpha-numeric characters and must not have any spaces.

4. In the *Visualforce Markup* tab, copy and paste the code that corresponds with your choice of login options:

- **Direct**: `<apex:page standardController="Lead"><apex:iframe src="https://login.eloqua.com/apps/salesTools/profiler?emailAddress={!lead.email}"/> </apex:page>`

- **Auto-login**: `<apex:page standardController="Lead"><apex:iframe src="https://login.eloqua.com/autoLogin?LoginPrefix={prefix}&Url=/apps/salesTools/profiler?emailAddress={!lead.email}"/> </apex:page>`
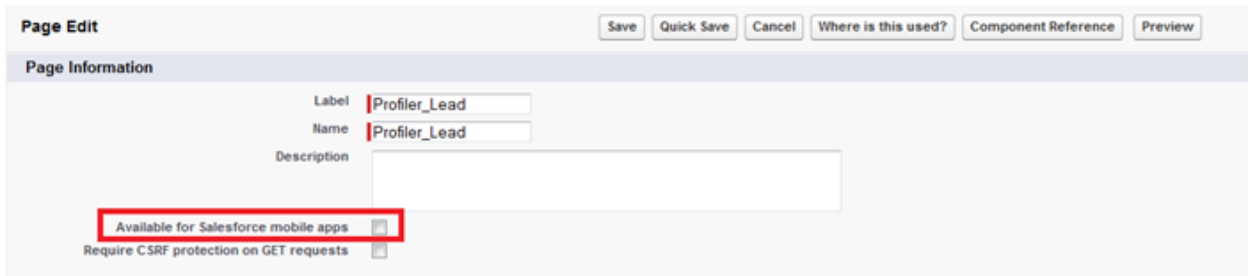
- **SAML**: `<apex:page standardController="Lead"><apex:iframe src="https://login.eloqua.com/auth/saml2/autologin?LoginPrefix={prefix}&ReturnUrl=/apps/salesTools/profiler?emailAddress={!lead.email}"/> </apex:page>`

- **Salesforce IDP**: `<apex:page standardController="Lead"><apex:iframe src="https://<podURL>/sso/sfdc/v1/svp.aspx?LP={prefix}&RU=/apps/salesTools/profiler?emailAddress={!lead.email}"/> </apex:page>`

> 💡 **Note**: Replace {*podURL*} with the URL in your browser after you have logged in successfully to Eloqua (for example, `secure.p01.eloqua.com`). Click here for additional information about how to determine your POD.`LoginPrefix` values are a four-character code for the company name that you enter in the Company field on the login page. To add this parameter to your URL, enter `LoginPrefix={prefix}` where {*prefix*} is replaced with the four characters company name. You can obtain your company's login prefix in Eloqua by navigating to Settings > Setup > Company Defaults. For your contacts Visualforce page, replace `{!lead.email}` with `{!contact.email}`.

> 👍 **Tip**: If SSO with Salesforce is configured, the use of either the SAML or Salesforce IDP method of integrating Sales Tools instead of the Direct method is recommended. The SAML link should be used if SSO with SFDC is setup using Eloqua's SAML capability. If using the Salesforce IDP option for SSO, the Salesforce IDP link should be used for integrating Sales Tools.

5. If you wish to enable this on the salesforce1 mobile app, select the check box next to *Available for Salesforce mobile apps*.
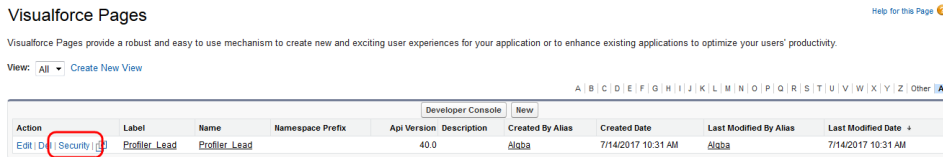

6. Click **Save**.

## Step 2: Adjusting security for Visualforce pages

Salesforce.com has default security that prevents certain users from viewing Visualforce pages unless the security on those individual pages is customized.

To adjust the security for a Visualforce page:

1. Navigate to **Develop** (under *Build* section) > **Visualforce Pages**.

2. Click **Security** next to the pages you created.

3. Add user types to the *Enabled Profiles* list. These are the users that should be able to view Eloqua Profiler.
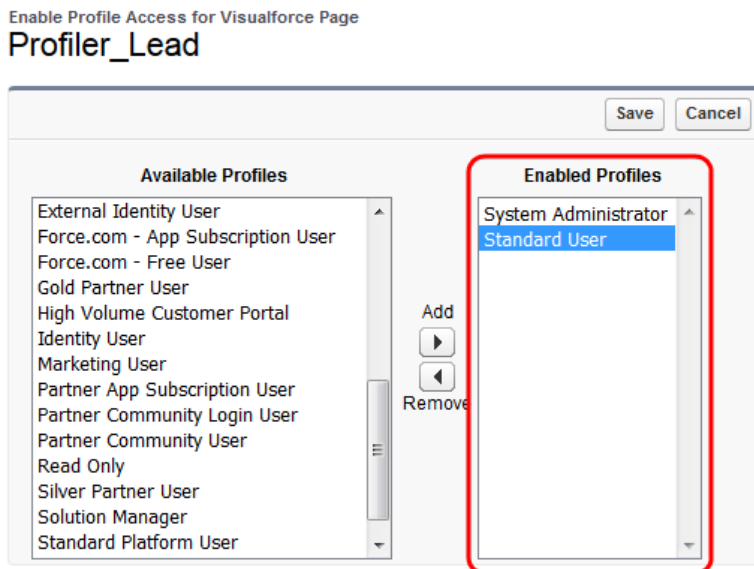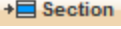

4. Click **Save**.

Step 3: Adding Visualforce pages to contact and lead layouts

The steps below describe the procedure for adding the Leads Visualforce page to a layout. The same steps can be followed for the Visualforce Contacts page you created.

To add a Visualforce page to layouts:

1. Navigate to **Setup** in the upper right-hand corner of the screen.

2. Navigate to **Customize** (under *Build* section) > **Leads** > **Page Layouts**.

3. Select **Edit** next to the layout in which you would like to insert Eloqua Profiler (either the one you are testing or the one that your sales team uses to review Lead records).

4. Drag the near the top of your screen into the area of the layout in which you would like Eloqua Profiler to be displayed.
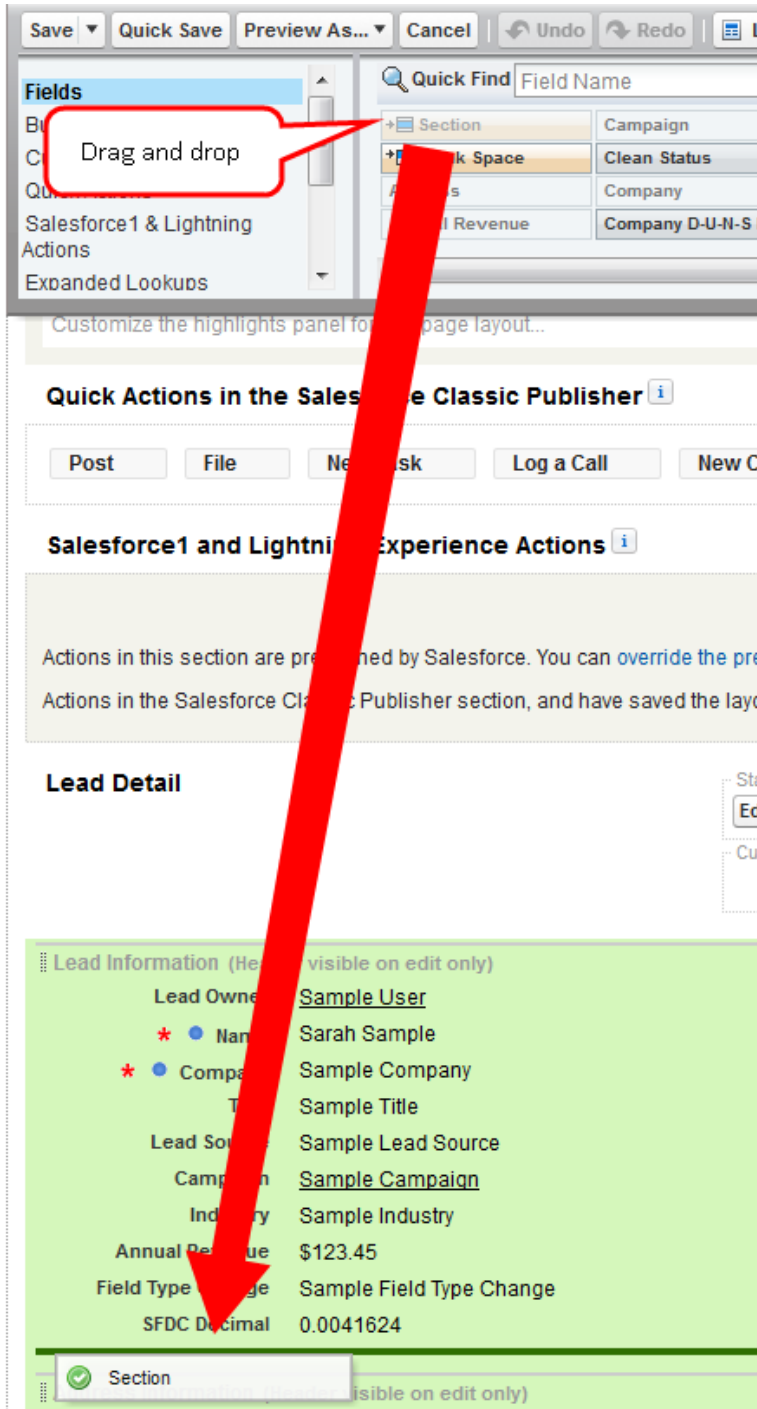
5. Name the section. Ensure that the two check boxes are selected, and select a 1-Column Layout.

> 💡 **Note**: The section name is what will be displayed above the section within the Lead view. Ensure that the name is something that will be relevant and intuitive to your sales users.

6. Go back to the top area (the area from which you dragged and dropped the new section) and scroll down if necessary to select **Visualforce Pages** (in the area just to the left of the buttons area). Then drag the button for new Visualforce page you made into the new section you just created.

7. Hover over the top right corner of the Visualforce page (inside the Section) until a wrench icon appears. Make sure it is the one for the Visualforce page and not the entire section.

8. Click on the wrench icon. In the VisualForce Page Properties, ensure that the width is set to 100% and the height is set to 610.

9. Click **Save** to save this layout.

> ℹ️ **Important**: Repeat the above steps for Contacts.

10. When you return to the *Leads* tab in Salesforce and click on a lead, the new Visualforce page containing Profiler is displayed in the new section you added.

11.6 Embedding Profiler in OKTA with SSO

This guide explains how to seamlessly configure and access Profiler through OKTA.

11.6.1 Configuration

The high level configuration steps are as follows:

Step 1: Configuring Profiler in OKTA with SSO

Profiler is an app you can access via a URL from any location. It could be launched standalone in a browser but is most commonly are embedded inside a CRM system. Once configured, you need to update Profiler to work with OKTA so that access is seamless.
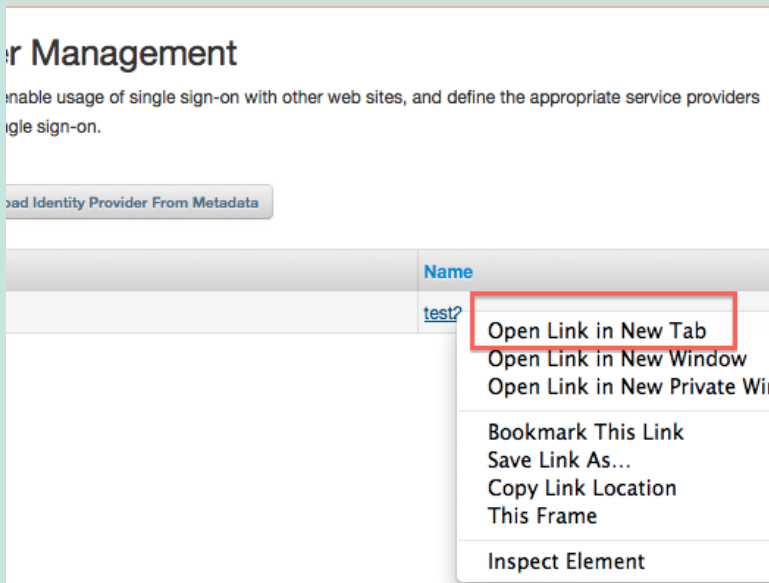
**To configure SSO with OKTA into Profiler:**

1. Enter the following URLs:

   https://login.eloqua.com/auth/saml2/autologin?LoginPrefix=<Login Prefix>&ReturnUrl=/apps/salesTools/profiler

> ♡ **Note**: Replace LoginPrefix=<LoginPrefix> where prefix is a 4 character identifying code like 'ELQA'. You can alternatively use <siteID> with your site ID - a numeric code, like '33' (it may be much longer). If you do not know what your prefix is, log a Service Request ("SR") via My Oracle Support (support.oracle.com). You can also choose to ignore this parameter and it will attempt to log you in using the first Eloqua saved credential it finds. Replace <IDPid> with the IDP unique ID from your SSO setup.

> 💡 **Note**: To find your IDP unique ID in Eloqua, navigate back to the Identity Management Provider interface. Right-click on the name of the Identity Provider you set up for OKTA and click **Open Link in New Tab**.
>
>
>
> On the new browser tab, look at the URL and copy the ID that appears after "....Display/".
>
>
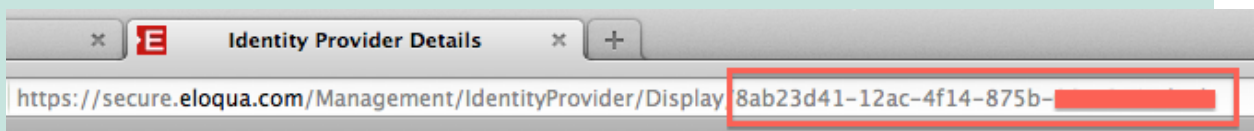
Once you have this properly formatted URL, as long as a user has an OKTA session active in their browser, the URL can be accessed from any location on the Internet and it will allow seamless access to Profiler.

If you wish to allow users direct access to Profiler from Apps in OKTA, you can do the following.

1. Repeat the SSO Configuration section above to create a new SAML2 template for Eloqua Profiler.

2. While creating the SAML2 template, add the following to the **Default Relay State** field:

    ReturnURL=%2FsalesTools%2Fprofiler