ORACLE®

Integrating Oracle Eloqua and Oracle Social Relationship Management

Configuration and User Guide

Contents

1 Oracle Social Relationship Management integration

> ⓘ **Important**: This Oracle Eloqua and Social Relationship Management integration is no longer available, and is currently only supported for existing customers. Please speak to your account manager for more information and alternative solutions. The Oracle SRM Custom Audiences app will continue to be available.

Oracle Eloqua enables marketers to plan and execute automated marketing campaigns while delivering a personalized customer experience for their prospects. These campaigns scale for audiences across all channels including email, display search, video advertising, and mobile. With integrated lead management and easy campaign creation, the solution helps marketers engage the right audience at the right time in their buyers journey. By gaining real-time insight through customers' Digital Body Language, sales teams can close more deals at a faster rate increasing Marketing's ROI.

The Oracle Social Relationship Management (SRM) platform is a web-based application that helps brands and marketers create and publish content to their social properties, and monitor, manage, and analyze the engagement with that content.

You can integrate Oracle Eloqua and Oracle SRM to leverage the following features for your organization:

- **The Oracle SRM SmartCap app**

    Push an Eloqua landing page to Oracle SRM. Schedule social media messages that coincide with the launch of a campaign in Eloqua.

- **Dynamic Link Tracking and Campaign tags**

  View click throughs on Oracle SRM published social links within Eloqua.

- **The Oracle SRM Custom Audiences app**Facebook's Custom Audiences system allows you to match your customer lists to Facebook users, opening you to social marketing opportunities you may not have had before by sending your Eloqua contacts into Oracle SRM. Using the SRM Custom Audiences app, you can take Eloqua contacts and add or remove them from Facebook Custom Audiences via SRM. This app is available on the campaign canvas and program canvas.

2 Configuring Oracle Eloqua and Oracle SRM for integration

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Configuration is required to your Eloqua instance and Oracle SRM platform before you can leverage the integration benefits of both platforms.

To prepare Oracle Eloqua for integration:

- Install the Oracle SRM SmartCap app

- Install the Oracle SRM Custom Audiences app

To prepare Oracle SRM for integration:

- Configure Dynamic Link Tracking

- Configure Eloqua Tags

2.1 Installing the Oracle SRM SmartCap app

> ℹ **Important**: This integration is no longer available, and is currently only supported for existing customers. Please speak to your account manager for more information and alternative solutions.

To install the Oracle SRM SmartCap app:

1. Follow the URL provided:

   https://cloud.oracle.com/marketplace/app/AppOracleSRM

   > 🔘 Note: If you have IP whitelisting enabled, add internal Eloqua IPs to your whitelist.

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. Configure the app:

   a. Enter your *SRM login URL*.

      > 🔘 Note: Enter the entire URL, including the hypertext transfer protocol. The default URL is https://publisher.vitrue.com.

   b. Click **Save**.

6. Click **Sign In** to grant permission for the app to communicate with Eloqua on your behalf.

7. 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.

> ⚠ **Warning**: To modify configuration settings, navigate to *Apps*, select your app, and click the **Configure** icon ⚙. Selecting the **Reinstall** icon ⬇ will force you to go through the entire configuration process again. The app will be unavailable for all users during the reinstall.

2.2 Installing the SRM Custom Audiences app

During SRM Custom Audience app installation, you sign in with an Oracle SRM account.

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

To install the SRM Custom Audience app:

1. Follow the URL provided:

   https://cloud.oracle.com/marketplace/app/AppSRMCustomAudiences

   > 💡 **Note**: If you have IP whitelisting enabled, add internal Eloqua IPs to your whitelist.

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

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

4. Configure the app:

    a. Click **Sign in with Oracle SRM**.

        If you are already logged in to Oracle SRM, your account is authenticated.

        If you are not already logged in, a new window opens. Enter your Oracle SRM credentials and click **Log In**.

    b. Click **Save** to complete the configuration.

5. Click **Sign In** to grant permission for the app to communicate with Eloqua on your behalf.

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.

> ⚠ **Warning**: To modify configuration settings, navigate to *Apps*, select your app, and click the **Configure** icon ⚙. Selecting the **Reinstall** icon ⬇ will force you to go through the entire configuration process again. The app will be unavailable for all users during the reinstall.

2.3 Configuring Dynamic Link Tracking in Oracle SRM

> **ℹ Important**: This integration is no longer available, and is currently only supported for existing customers. Please speak to your account manager for more information and alternative solutions.

Using Oracle SRM Publish, you can create dynamic links that can be read by Eloqua and attach those URLs to a Publish post. Admins will set up the various parameters and values that can be attached to a URL, which users can then select in the Create a Post page to create unique tracking URLs to attach to their posts.

Prerequisites:

- First-party cookies in Eloqua must be disabled. Dynamic Link Tracking will not work as expected if first-party cookies in Eloqua are enabled.

To configure Dynamic Link Tracking in Oracle SRM:

1. Navigate to **Publish** > **Admin** > **Tracking**.

2. Under *Choose your 3rd party system*, click the drop-down list and select **Eloqua**.

3. Log into your Eloqua account. A Base URL is created for you.

4. On the *Choose Post Parameters* page, the fields are pre-populated with default parameters.

> 💡 **Note**: These default parameters do not need to be selected when creating a post and will automatically be appended to the destination URL when published. In contrast, if you create your own custom parameters, you must select them when creating a post for these parameters to be appended to the destination URL.

5. Click **Save**.

6. On the *Create Custom Parameters* page, create custom parameters and values which your users will then be able to choose from when they create a post.

   a. In the *Add Parameter* section, specify the details for the parameter.

      - **Name** - Helps you identify what the parameter is

      - **ID** - The code that will appear for that parameter in the URL

      - **You are required to enter a value for this parameter** - Select to require users to assign a value to this parameter

   b. Click **Add**. The parameter appears in the left pane.

   c. (Optional) Click the triangle next to the parameter name to add a value to the parameter. A box appears to the right for you to enter a value. You can enter up to 10 values on this page before saving. Values must have unique names. To add a second level parameter to a value, click on the arrow next to its name.

For more information on Dynamic Link Tracking, see the Oracle SRM Help Center.

2.4 Configuring Eloqua Tags in Oracle SRM

> ⓘ **Important**: This integration is no longer available, and is currently only supported for existing customers. Please speak to your account manager for more information and alternative solutions.

Tags are words and phrases that you can apply to posts, allowing you to organize and track your posts to your different social properties. After configuring tags, they will appear in a drop-down menu in the Tagging area of the Create a Post page where any user can add them to a post, and the tags you select for a post will appear on the Post Grid. If you are using Dynamic Link Tracking, an Eloqua campaign must be selected as a tag.

To configure Eloqua tags in Oracle SRM:

1. Navigate to **Publish** > **Admin** > **Tags**.

2. Under *CRM Tags*, click **Import**.

3. Click the drop-down and select **Eloqua**.

4. Enter your Eloqua login credentials and click **Login**.

Your active Eloqua campaigns will appear as tags in the box below. On the *Create a Post* page, these tags are available to be added to a post.

> **ⓘ Important**: When you add new campaigns in Eloqua, the next time you come back to Oracle SRM, you must refresh your login on the admin page to add the new tags to your list in Publish.

For more information on Tags, see the Oracle SRM Help Center.

3 Working with Oracle Eloqua and Oracle SRM integration

> ℹ **Important**: This integration is no longer available, and is currently only supported for existing customers. Please speak to your account manager for more information and alternative solutions.

Once setup is complete, get started in each area with the following:

- Transferring Eloqua campaigns into tags in Oracle SRM

- Pushing a landing page to the Oracle SRM SmartCap service

- Viewing Dynamic Link Tracking activity from Oracle SRM

- Adding the SRM Custom Audiences action to your canvas

3.1 Transferring Eloqua campaigns into tags in Oracle SRM

> ℹ **Important**: This integration is no longer available, and is currently only supported for existing customers. Please speak to your account manager for more information and alternative solutions.

After the configuration is setup, you can see Eloqua campaigns as tags within Oracle SRM. This allows you to group social messages together to see the effectiveness of them as an element of an Eloqua campaign. A campaign must be active in Eloqua for tags to appear in Oracle SRM.

3.2 Pushing a landing page to the Oracle SRM SmartCap service

> 🛈 **Important**: This integration is no longer available, and is currently only supported for existing customers. Please speak to your account manager for more information and alternative solutions.

In order to use the Oracle SRM SmartCap service, it must be installed by a customer administrator.

To push a landing page to Oracle SRM SmartCap service:

1. Open or create a landing page that you would like to push to the Oracle SRM SmartCap service.

   > 🛈 **Important**: Select a microsite with a valid URL for your landing page.

2. Click the *cloud menu* icon on the right hand side to expand it. Available content services are displayed.

> 💡 **Note**: If you do see the *cloud menu icon*, save the landing page and refresh your browser. The *cloud menu icon* will appear.

3. Click the *SRM SmartCap Menu Service*. A login screen for SRM opens in a separate tab.
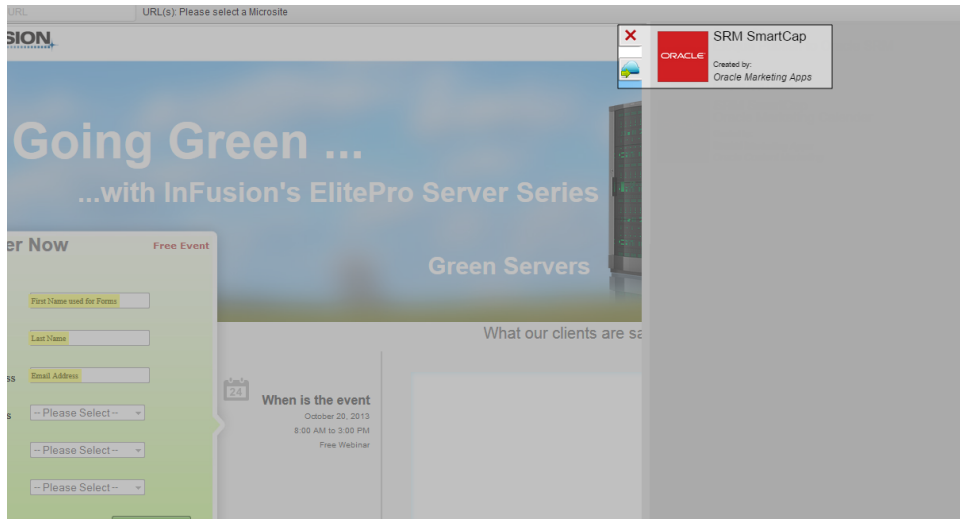
   a. Enter your SRM login credentials and click **Login**.

   b. Create your content. The post name and URL will be prepopulated with information from your landing page.
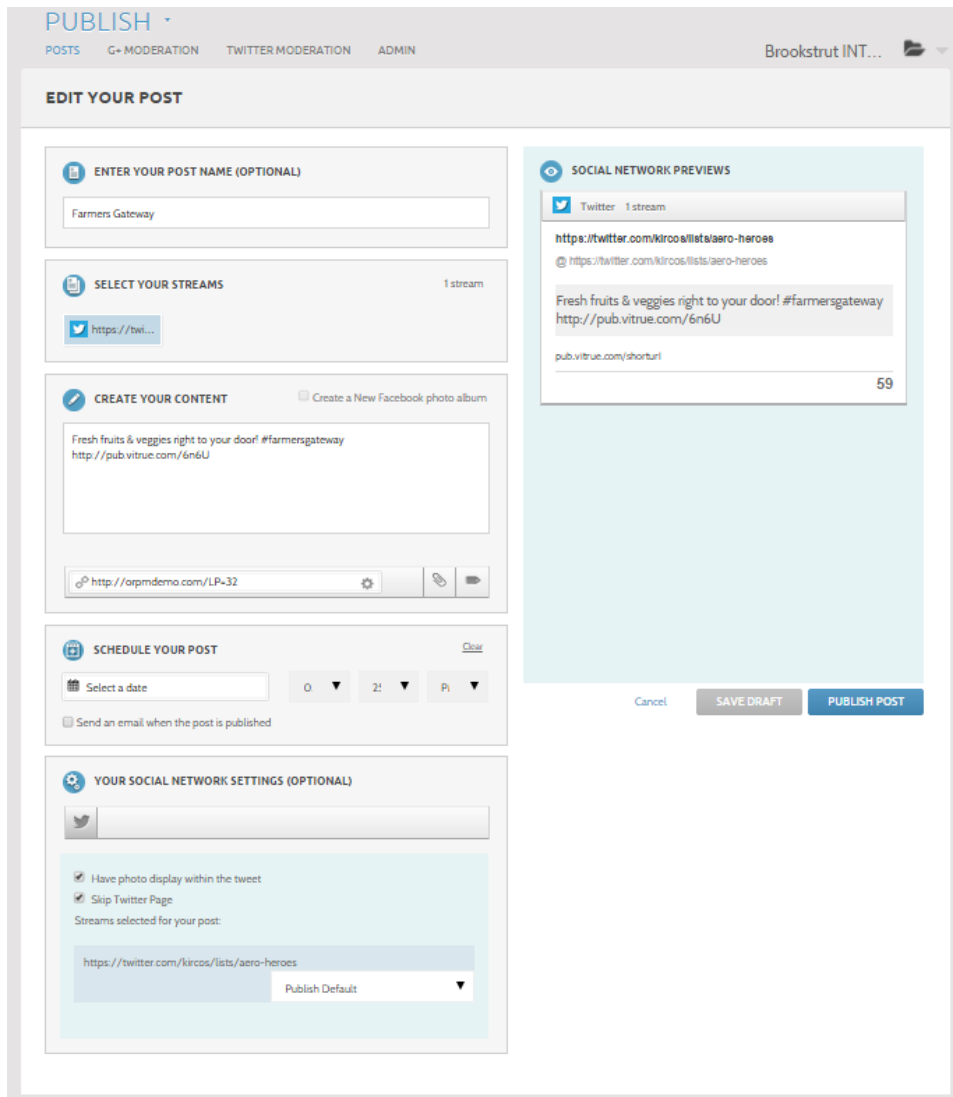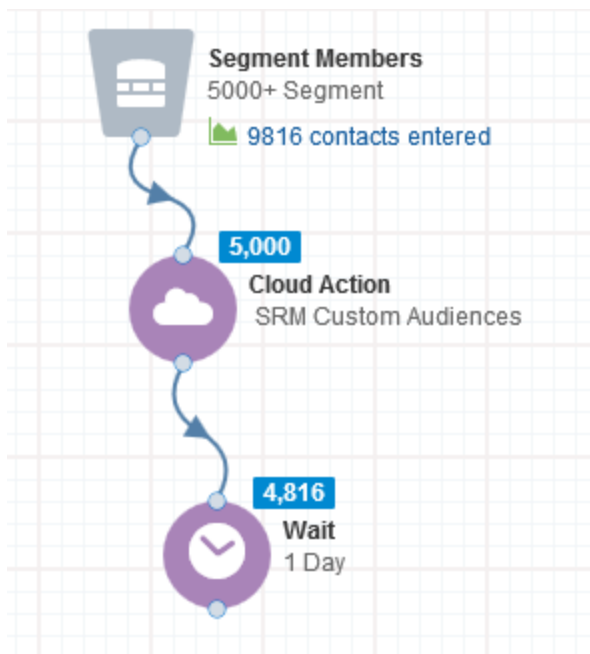
    c. Click **Save Draft** or **Publish Post**.

4. Click **Save** to save the landing page.

3.3 Adding the SRM Custom Audiences action to your canvas

You can use the SRM Custom Audience app on the campaign canvas and program canvas.

The SRM Custom Audiences app must be installed by a Customer Administrator.

To add the SRM Custom Audiences action to your campaign or program:

1. Open an existing campaign or program, or create a new one.

2. Drag the **SRM Custom Audiences Action** element, from the *Actions* section, onto the canvas.

3. Double-click it to open the configure screen. The window that opens enables you to do the following:

   - Change the name of the step to something more meaningful

   - Configure the element

   - Choose to route contacts that resulted in an error to another step (see: Configuring cloud action and decision elements for more information).

4. Click the **Edit** icon to configure the action.

a. Select an Oracle SRM *Bundle*.

b. Select a Facebook *Custom Audience*.

c. Select either **Add** or **Remove** from drop-down. Contacts will be added or removed from the selected Facebook Custom Audiences as they flow through the campaign or program.

d. Click **Save**.

5. Return to your campaign or program and continue to modify it as desired.

The SRM Custom Audiences action should now be properly configured. When contacts flow into the step, they will be added or removed from the selected Facebook Custom Audience.

3.4 Viewing Dynamic Link Tracking activity from Oracle SRM in Eloqua

ⓘ **Important**: This integration is no longer available, and is currently only supported for existing customers. Please speak to your account manager for more information and alternative solutions.

After Dynamic Link Tracking has been enabled, you can view click throughs on Oracle SRM published social links within Eloqua. Click throughs are stored in Eloqua as external activities and can be viewed in three areas:

- Segment building

- Activity log

- Profiler

> ♀ **Note**: Dynamic Link Tracking can only identify known contacts. Any activity from an unknown contact will not be tracked.

3.4.1 Viewing activity when building segments

Once the first successful click on a link published from Oracle SRM occurs, you can view activity in segmentation.

To view activity when building segments:

1. Navigate to **Audience** > **Segments**.

2. Create a new segment.

3. Add a new filter criteria.

4. Add **SRM Tracked Link** to your filter criteria.

5. Configure the segment as normal.

Your segment will contain contacts who participated in the social messages from your Oracle SRM instance.

3.4.2 Viewing activity in the activity log

To view activity in the activity log:

1. Navigate to **Audience** > **Contacts**.

2. Search for a contact.

3. Double-click the contact's name.

4. On the **Edit Contact** page, click **Activity Log**.

5. Click the picklist, select **External Activities**.

The Oracle SRM activity will be displayed.

3.4.3 Viewing activity in Profiler

1. Navigate to Profiler.

2. Select a contact.

3. Click **Activity**.

Oracle SRM activity will be displayed.