Oracle DataFox

Using DataFox

June 2021
Oracle DataFox
Using DataFox

June 2021

Part Number: F19189-63

Copyright © 2018, 2020, 2021, Oracle and/or its affiliates. All rights reserved

Authors: Oracle DataFox Information Development

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display in any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

If this is software or related documentation that is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, then the following notice is applicable:

U.S. GOVERNMENT END USERS: Oracle programs (including any operating system, integrated software, any programs embedded, installed or activated on delivered hardware, and modifications of such programs) and Oracle computer documentation or other Oracle data delivered to or accessed by U.S. Government end users are "commercial computer software" or "commercial computer software documentation" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, the use, reproduction, duplication, release, display, disclosure, modification, preparation of derivative works, and/or adaptation of i) Oracle programs (including any operating system, integrated software, any programs embedded, installed or activated on delivered hardware, and modifications of such programs), ii) Oracle computer documentation and/or iii) other Oracle data, is subject to the rights and limitations specified in the license contained in the applicable contract. The terms governing the U.S. Government’s use of Oracle cloud services are defined by the applicable contract for such services. No other rights are granted to the U.S. Government.

This software or hardware is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications that may create a risk of personal injury. If you use this software or hardware in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy, and other measures to ensure its safe use. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software or hardware in dangerous applications.

Oracle and Java are registered trademarks of Oracle Corporation and/or its affiliates. Other names may be trademarks of their respective owners.

Intel and Intel Inside are trademarks or registered trademarks of Intel Corporation. All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. AMD, Epyc, and the AMD logo are trademarks or registered trademarks of Advanced Micro Devices. UNIX is a registered trademark of The Open Group.

This software or hardware and documentation may provide access to or information about content, products, and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services unless otherwise set forth in an applicable agreement between you and Oracle. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services, except as set forth in an applicable agreement between you and Oracle.

The business names used in this documentation are fictitious, and are not intended to identify any real companies currently or previously in existence.
# Contents

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Preface</td>
<td>i</td>
</tr>
<tr>
<td><strong>1 Overview</strong></td>
<td>1</td>
</tr>
<tr>
<td>Welcome to Oracle DataFox</td>
<td>1</td>
</tr>
<tr>
<td>About Signing In and Changing Your Credentials</td>
<td>1</td>
</tr>
<tr>
<td>Accessibility</td>
<td>2</td>
</tr>
<tr>
<td><strong>2 Get Started for Admins</strong></td>
<td>3</td>
</tr>
<tr>
<td>Overview</td>
<td>3</td>
</tr>
<tr>
<td>Get Started with Oracle DataFox in Oracle Cloud</td>
<td>3</td>
</tr>
<tr>
<td>Manage Team Members, Single Sign-On, and Other Settings</td>
<td>5</td>
</tr>
<tr>
<td>Integrate with Your Application</td>
<td>6</td>
</tr>
<tr>
<td>Upgrade Your Company Data</td>
<td>6</td>
</tr>
<tr>
<td>Discover an Ideal Customer Profile</td>
<td>6</td>
</tr>
<tr>
<td>Prioritize Customers</td>
<td>7</td>
</tr>
<tr>
<td><strong>3 Manage Users, Single Sign-On, and Other Settings</strong></td>
<td>9</td>
</tr>
<tr>
<td>Overview of User Management</td>
<td>9</td>
</tr>
<tr>
<td>Manage Users</td>
<td>9</td>
</tr>
<tr>
<td>Roles and User Administration with Oracle Identity Cloud Service</td>
<td>10</td>
</tr>
<tr>
<td>Manage Single Sign-On</td>
<td>11</td>
</tr>
<tr>
<td>Other Settings</td>
<td>13</td>
</tr>
<tr>
<td><strong>4 Set Up and Administer Oracle CX Sales Integration</strong></td>
<td>15</td>
</tr>
<tr>
<td>Integrate with Oracle CX Sales</td>
<td>15</td>
</tr>
<tr>
<td>Field Mappings</td>
<td>16</td>
</tr>
<tr>
<td>Set Up Industry Hierarchy Labels in CX Sales</td>
<td>20</td>
</tr>
<tr>
<td>Bulk Sync Accounts</td>
<td>21</td>
</tr>
<tr>
<td>Enable Oracle DataFox Features in CX Sales</td>
<td>22</td>
</tr>
<tr>
<td>Enable Smart Talking Points in Oracle CX Sales</td>
<td>23</td>
</tr>
</tbody>
</table>
5 Set Up and Administer Salesforce Integration

Integrate with Salesforce
CRM Insights
Administer Salesforce Powered by Oracle DataFox
Troubleshoot Salesforce Sync Issues

6 Set Up and Administer Oracle Eloqua Integration

Considerations for Account vs. Contact Enrichment
Set Up DataFox for Eloqua
Set Up Account Enrichment for Eloqua
Set Up Contact Enrichment for Eloqua
How DataFox Companies and Eloqua Accounts or Contacts Are Matched
Uninstall DataFox for Eloqua
Reinstall DataFox for Eloqua

7 Data Diagnostics

Overview of CRM Diagnostics and Enrichment
Foundation of Data Diagnostics
Data Diagnostics Report
How Records are Matched with DataFox Companies

8 Enrich Oracle CX Sales

Overview
Sync and Enrich Your Account
Smart Talking Points in Oracle CX Sales
Smart Talking Points in Oracle Sales Assistant

9 Enrich Salesforce

Overview of Salesforce Data Enrichment
Connect Your Oracle DataFox User to Your Salesforce User Profile
Sync and Enrich Your Accounts
Use Salesforce Filters
View Opportunity Info on Synced Company Profiles
Search for Salesforce Opportunities in Oracle DataFox
How to Export Salesforce Accounts for Oracle DataFox Import
<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Salesforce Account and Lead Matching Logic</td>
<td>134</td>
</tr>
<tr>
<td>Sync a List Name to Salesforce</td>
<td>134</td>
</tr>
<tr>
<td>Account Scoring for Sales Reps</td>
<td>136</td>
</tr>
<tr>
<td>Salesforce Frequently Asked Questions</td>
<td>140</td>
</tr>
<tr>
<td><strong>Enrich Oracle Eloqua</strong></td>
<td>143</td>
</tr>
<tr>
<td>Benefits of Integrating with Oracle DataFox</td>
<td>143</td>
</tr>
<tr>
<td>Examples for Enrichment</td>
<td>143</td>
</tr>
<tr>
<td>Example of Using Oracle DataFox Data for a Marketing Campaign</td>
<td>143</td>
</tr>
<tr>
<td><strong>Company Prospecting Discovery</strong></td>
<td>145</td>
</tr>
<tr>
<td>Overview of Company Search</td>
<td>145</td>
</tr>
<tr>
<td>Filter Companies</td>
<td>146</td>
</tr>
<tr>
<td>How Filters Work</td>
<td>147</td>
</tr>
<tr>
<td>Customize and Reorder Fields</td>
<td>147</td>
</tr>
<tr>
<td>Overview of Advanced Insights</td>
<td>148</td>
</tr>
<tr>
<td>New Customer Account Prospects</td>
<td>155</td>
</tr>
<tr>
<td>Existing Company Prospects</td>
<td>170</td>
</tr>
<tr>
<td><strong>Account Scoring</strong></td>
<td>187</td>
</tr>
<tr>
<td>Overview of Account Scoring</td>
<td>187</td>
</tr>
<tr>
<td>Account Scoring Criteria Sets</td>
<td>187</td>
</tr>
<tr>
<td>Build Your Ideal Customer Profile</td>
<td>189</td>
</tr>
<tr>
<td>Set Up Account Scoring</td>
<td>190</td>
</tr>
<tr>
<td>Use Account Scoring to Find Your Best-Fit Accounts</td>
<td>197</td>
</tr>
<tr>
<td>Best Practices for Account Scoring</td>
<td>198</td>
</tr>
<tr>
<td>Examples of Account Scoring</td>
<td>199</td>
</tr>
<tr>
<td><strong>Signals and Alerts</strong></td>
<td>203</td>
</tr>
<tr>
<td>Overview of Company Signals</td>
<td>203</td>
</tr>
<tr>
<td>Signal Alerts</td>
<td>205</td>
</tr>
<tr>
<td><strong>Conference Intelligence</strong></td>
<td>207</td>
</tr>
<tr>
<td>Overview</td>
<td>207</td>
</tr>
<tr>
<td>Custom Requests</td>
<td>213</td>
</tr>
</tbody>
</table>
## 15 Inbound Marketing Intelligence

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overview</td>
<td>217</td>
</tr>
<tr>
<td>Company Data for Leads</td>
<td>218</td>
</tr>
<tr>
<td>Lead to Company Matching</td>
<td>220</td>
</tr>
<tr>
<td>Company Scoring Criteria on CRM Lead IFrame in Salesforce</td>
<td>220</td>
</tr>
<tr>
<td>Examples of Inbound Marketing</td>
<td>221</td>
</tr>
</tbody>
</table>

## 16 Workflow Integrations

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spreadsheets Imports and Exports</td>
<td>229</td>
</tr>
<tr>
<td>Slack</td>
<td>253</td>
</tr>
<tr>
<td>Install Google Chrome Extension</td>
<td>260</td>
</tr>
</tbody>
</table>

## 17 Static and Dynamic Lists

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overview</td>
<td>263</td>
</tr>
<tr>
<td>Share Lists to Collaborate with Your Team</td>
<td>264</td>
</tr>
<tr>
<td>Search LinkedIn Contacts From An Oracle DataFox List</td>
<td>265</td>
</tr>
</tbody>
</table>

## 18 Frequently Asked Questions

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>How is Headcount Verified?</td>
<td>267</td>
</tr>
<tr>
<td>How Can I Request to Add a Company to Oracle DataFox?</td>
<td>268</td>
</tr>
<tr>
<td>How Can I Suggest Edits to an Existing Company?</td>
<td>268</td>
</tr>
<tr>
<td>Can I Configure the Timeout Duration?</td>
<td>268</td>
</tr>
</tbody>
</table>

## 19 Common Terms and Field Descriptions

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Common Terms</td>
<td>269</td>
</tr>
<tr>
<td>Field Descriptions</td>
<td>269</td>
</tr>
</tbody>
</table>
Preface

This preface introduces information sources that can help you use the application and this guide.

Using Oracle Applications
To find guides for Oracle Applications, go to the Oracle Help Center.

Documentation Accessibility
For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website.

Contacting Oracle
You can access electronic support through Oracle Support. For information, visit My Oracle Support or visit Accessible Oracle Support if you're hearing impaired.

You can join the DataFox for Sales forum on Cloud Customer Connect to connect with other customers, post queries, learn about upcoming events, and get assistance by industry experts.

Here are a few more links to help you get started quickly.

- Contact My Oracle Support
- Create Your Oracle Account
- Work Effectively with Support
- Create a Technical Service Request

Please give us feedback about Oracle Applications Help and guides. You can send an e-mail to: oracle_aiapps_doc_feedback_grp@oracle.com.
1 Overview

Welcome to Oracle DataFox

Oracle DataFox aggregates company intelligence from multiple sources into one powerful platform. You can rely on company-level insightful data and signals to prioritize accounts, enrich leads, upgrade CRM data, and identify new prospects.

You can filter over a million companies by keyword, location, headcount, technographics, or create your own search. Use this filtered data to find and prioritize target companies to source more opportunities. Enrich your records with company firmographic data and company signals data.

This image illustrates your journey with Oracle DataFox. If you’re an admin, integrate Oracle DataFox with your CRM application to enhance sales and investment decisions, complete data diagnosis, and set up account scoring criteria and tiers. To get started, see Get Started for Admins.

If you’re a sales rep, you use Oracle DataFox signals and account intelligence to reach out to prospective customers.

For information on browser support, see System Requirements.

About Signing In and Changing Your Credentials

When your administrator creates your account, you will receive an email asking you to activate your account. Click Activate Your Account in the email to open Oracle Identity Cloud Service. Set your password and access your Oracle DataFox instance in the Active Services section.

Depending on your setup, you can change your user information and password on the General Information page in settings, or click the Change User Info button instead. Clicking this button opens Oracle Identity Cloud Service, where
you can change your profile information and password. To go to the General Information page, click your user name, click **Settings**, and then click the General Information tab.

## Accessibility

You can use assistive technology products, such as screen readers, while you work in the application. You can also use the keyboard instead of the mouse.

This table lists the supported accessibility features.

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Zoom</td>
<td>You can use your browser's zoom feature to resize text up to one fifty percent without loss of content or functionality.</td>
</tr>
<tr>
<td>Contrast</td>
<td>Large-scale text, and images of large-scale text have a contrast ratio of at least 3:1.</td>
</tr>
<tr>
<td>Screen Reader</td>
<td>You can use screen readers. No special mode is required to enable it.</td>
</tr>
</tbody>
</table>
2 Get Started for Admins

Overview

If you're an admin, here's a list of tasks for you to get started with Oracle DataFox and set it up for your users.

- Get Started with Oracle DataFox in Oracle Cloud
- Manage Team Members, Single Sign-On, and Other Settings
- Integrate with Your Application
- Upgrade Your Company Data
- Discover an Ideal Customer Profile
- Prioritize Customers

Get Started with Oracle DataFox in Oracle Cloud

To start using Oracle DataFox, activate the service in an existing account or start by creating an Oracle Cloud account. If you already have an Oracle Cloud account, it's good practice to use the same account for Oracle DataFox instead of creating an additional one.

Activate Your Oracle DataFox Order in a New Oracle Cloud Account

After you buy the subscription for Oracle DataFox, you receive an email from Oracle with the subject Welcome to Oracle Cloud. Set up your account.

1. Click Create New Cloud Account in the email.
2. On the Activate My Services page, in the Cloud Account Name field, enter a unique name for your account like your organization's name.
   
   Note: It's good practice to use your organization's name for your account. Enter a generic name as it will be used in your DataFox instance URL. Do not use your name, any Personally Identifiable information (PII), name of the product (DataFox), or name of the environment (production, sandbox) in your cloud account name.

3. Enter your email address. The email address must be the same as the person who received the welcome email.
4. Enter the administrator details.
5. Click Create Account.

A message appears confirming that your Oracle Cloud service is activated.

Although your account is typically created within an hour, it may sometimes take up to a day. After your account is created, you will receive an email with the subject Setup Complete. You're ready to go. Now, you can sign in to Oracle Cloud and access your Oracle DataFox instance.
Activate Your Oracle DataFox Order in an Existing Oracle Cloud Account

If you already have an Oracle Cloud account, you will still receive the email with the subject Welcome to Oracle Cloud. Set up your account after you subscribe. You must activate your Oracle DataFox service to get started.

1. Click Activate into Existing Cloud Account in the email.
2. On the Oracle Cloud sign in page, enter your existing Oracle Cloud account name.
3. On the Oracle Cloud Infrastructure Classic Dashboard page, go to the navigation menu, and click Account.
4. From the Activate tab, find the Oracle DataFox service that you want to activate and click the Cloud Services Account Setup button.
5. On the Activate My Services page, from the Cloud Account Name list, select the account for which you want to activate the Oracle DataFox service.
6. Click Assign Account.

A message appears confirming that your Oracle Cloud service is activated. After your account is activated, you will receive an email with the subject Setup Complete. You’re ready to go. Now, you can sign in to Oracle Cloud and access your Oracle DataFox instance.

Sign In to Oracle Cloud for the First Time

Keep the setup complete email that you received handy. This email includes the link to your service, user name, and a temporary password.

1. In the Access Details section of the email, click the Console URL link.
2. Use the user name and the temporary password shared in the email to sign in to Oracle Cloud.
3. In the Reset your password dialog box, change your password.

You will receive an email confirming that your password is updated. After you reset the password, the Oracle Cloud Infrastructure Classic Dashboard appears.

Access Your Oracle DataFox Instance

Access your Oracle DataFox instance from the Oracle Cloud dashboard or using the service instance URL that you received in the setup complete email. Follow these steps to add Oracle DataFox to your dashboard.

1. On the Oracle Cloud dashboard, click the icon next to Dashboard.
2. In the Customize Dashboard dialog box, find DataFox, and click Show to add DataFox to the dashboard in the Active Services section.
3. In the Active Services section, click DataFox.
4. On the Service: Oracle DataFox Cloud Service page, click the Open Service Console button.

Your unique Oracle DataFox service instance opens. You can now start using the application.

To add users, go to Settings > Team Management and click Oracle Identity Cloud Service. For details, see Roles and User Administration with Oracle Identity Cloud Service.

Create an Additional Oracle DataFox Instance

If you want to test features in a stage environment before they are released, you need an additional Oracle DataFox instance. Start by creating an additional Oracle Identity Cloud Service instance, and then request an additional Oracle DataFox instance. This additional instance is associated with the new Oracle Identity Cloud Service instance. Here’s how you can create an additional Oracle Identity Cloud Service instance:

1. Sign in to the Oracle Cloud dashboard.
2. From the Active Services section, click **Identity Cloud**.
3. On the Oracle Identity Cloud Service page, in the Service Instances section, click **Create Service Instance**.
4. On the Create New Oracle Identity Cloud Service Instance page, enter these details:

<table>
<thead>
<tr>
<th>Field</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Enter your name. It's a good practice to include 'stage' or 'prod' in the name, for example, Stage_Invision. The name that you enter here will be prefixed to the new instance that's created.</td>
</tr>
<tr>
<td>License Type</td>
<td>Select <strong>IDCS Foundation</strong>.</td>
</tr>
<tr>
<td>Email</td>
<td>Your email is autopopulated. However, if you want another user to be the admin for this new instance, you can enter that user's email address.</td>
</tr>
<tr>
<td>First Name</td>
<td>Enter your first name or the first name of the user who's going to be the admin of the new instance.</td>
</tr>
<tr>
<td>Last Name</td>
<td>Enter your last name or the last name of the user who's going to be the admin of the new instance.</td>
</tr>
</tbody>
</table>

5. Click **Create**.

You will receive an email with the details of the service instance along with a user name and a temporary password. The email is sent to the address that you entered in the **Email** field.

6. In the Access Details section of the email, click the Admin Console URL link.
7. Sign in to the Oracle Identity Cloud Service instance using the user name and password in the email.
8. In the Reset Your Password dialog box, change your password.

After a new Oracle Identity Cloud Service instance is created, raise a technical service request in My Oracle Support for an additional Oracle DataFox instance. In the service request, provide the Admin Console URL, the email address, and the first and last names of the admin for the new Oracle Identity Cloud Service instance.

After the request is processed, Oracle Support updates your SR with the details of the new Oracle DataFox instance. You can then sign in using your new Oracle Identity Cloud Service instance credentials. You can also create new admins and users for the newly created Oracle DataFox instance.

---

### Manage Team Members, Single Sign-On, and Other Settings

The way you manage users changed for new customers starting December 10th, 2020. Depending on your setup, there are now two ways to manage users and here's how to tell which way applies to you. Go to the Team Management page in Settings:

- If you see the **Oracle Identity Cloud Service** button, click the button to manage users. See: **Roles and User Administration with Oracle Identity Cloud Service**
- If you don't see the button, you manage users directly on the Team Management page. See: **Manage Users**
Single Sign-On
If you want to use single sign-on, your next step depends on how you manage users:

- If you manage users using Oracle Identity Cloud Service, contact Oracle Support to configure your identity provider.
- If you manage users on the Team Management page, see Manage Single Sign-On.

Integrate with Your Application
You can integrate these applications with Oracle DataFox:

- Oracle CX Sales
  See: Set Up and Administer Oracle CX Sales Integration
- Salesforce
  See: Set Up and Administer Salesforce Integration
- Eloqua
  See: Set Up and Administer Oracle Eloqua Integration

Use the Oracle DataFox REST APIs
To leverage Oracle DataFox features, even if you aren’t integrating your application with Oracle DataFox, you can use the Oracle DataFox REST API services. See: REST API for Oracle DataFox.

Upgrade Your Company Data
As a one-time activity and at your request, Oracle Support diagnoses your company data. During this activity, Oracle Support cleans your company data records, matches your accounts with Oracle DataFox companies, and shares the matching results with you. Oracle Support sets up a review call with you to assess the matched rows, duplicates found, and irregular rows. You can then clean up your company data based on the data assessment. See: Data Diagnostics.

You can use Oracle Customer Data Management Cloud to clean, consolidate, and enrich your company data.

If you’re using Oracle CX Sales, see Implementing Sales. For a different CRM, see Implementing Customer Data Management.

Discover an Ideal Customer Profile
You can discover what an ideal customer profile looks like by understanding what your best customers have in common and by finding more companies that match. Filter and build lists to identify an ideal set of companies. You can work on this ongoing activity at any point after you integrate with Oracle DataFox.

If your integrations with Oracle DataFox aren’t bidirectional, you can use the CSV List Upload to upload the fields that don’t exist in Oracle DataFox. See: Import Company Lists.

With Oracle DataFox insights, you can find key firmographic information about your current customers and discover similar companies worth targeting.

For more information, see Company Prospecting Discovery.

Prioritize Customers

You can build a data-driven account score based on customer analysis and insights to help your sales reps identify and prioritize accounts.

See: Account Scoring.

Note: This is an ongoing activity and you can accomplish this activity at any point after you integrate with Oracle DataFox. Learn how to create account scoring criteria, preview, and publish the account scores.
3 Manage Users, Single Sign-On, and Other Settings

Overview of User Management

Depending on your setup, you can manage users in one of the following ways:

- On the Team Management page in settings. See: Manage Users
- In Oracle Identity Cloud Service. See: Roles and User Administration with Oracle Identity Cloud Service

Manage Users

There’s a new approach to managing users for customers who subscribed to Oracle DataFox on or after December 10th, 2020. To know which approach applies to you, go to the Team Management page in settings and look for the Oracle Identity Cloud Service button. If you don’t see the button, that means you will manage users in Oracle DataFox and this topic applies to you.

Any user can add team members to Oracle DataFox. However, you must be an admin or an account owner to edit or delete members.

Note: If you use single sign-on to sign in to Oracle DataFox, you can’t manage team members on the Team Management page. You should be an account owner to manage members from your identity provider. See Manage Single Sign-On for details.

Invite Team Members

Here’s what you can do to add and manage team members from the Team Management page.

1. On the user menu, click Settings, and then click the Team Management tab.
2. On the Active users tab, click Invite your team to add a member.
3. Enter the email addresses of your team members and send as many invitations as you need.
   - If you’re an admin, on the Status list, select Admin to designate an active member as an admin.

Note: If you want to change the account owner for a team, contact Oracle Support.

Delete Team Members

If you’re an admin, click the Delete icon from the Active Users tab to delete a team member from the team. The Deleted Users tab displays the deleted team members with an option to restore a deleted team member.
User Status

User status controls the access that users have to different features of the application.

This table lists the tasks you can do in the application depending on your user status.

<table>
<thead>
<tr>
<th>User Status</th>
<th>Tasks</th>
</tr>
</thead>
<tbody>
<tr>
<td>Member, Admin, and Account Owner</td>
<td>View and search company profiles</td>
</tr>
<tr>
<td></td>
<td>View and search signals</td>
</tr>
<tr>
<td></td>
<td>View and search conferences</td>
</tr>
<tr>
<td></td>
<td>Invite users</td>
</tr>
<tr>
<td></td>
<td>View account scores and criteria sets</td>
</tr>
<tr>
<td></td>
<td>View the role status of other users in the team</td>
</tr>
<tr>
<td></td>
<td>Insights: Create and view reports</td>
</tr>
<tr>
<td></td>
<td>Create and upload lists</td>
</tr>
<tr>
<td></td>
<td>Set up alerts</td>
</tr>
<tr>
<td></td>
<td>View custom fields</td>
</tr>
<tr>
<td></td>
<td>Edit custom fields</td>
</tr>
<tr>
<td></td>
<td>View team details</td>
</tr>
<tr>
<td>Admin and Account Owner</td>
<td>Edit account scores</td>
</tr>
<tr>
<td></td>
<td>Edit and delete users and roles</td>
</tr>
<tr>
<td></td>
<td>Set up account scoring</td>
</tr>
<tr>
<td></td>
<td>Assign account scoring criteria sets to users</td>
</tr>
<tr>
<td></td>
<td>Set a default criteria set</td>
</tr>
<tr>
<td>Account Owner</td>
<td>Transfer the deleted user’s owned lists</td>
</tr>
<tr>
<td></td>
<td>Override single sign-on</td>
</tr>
</tbody>
</table>

Roles and User Administration with Oracle Identity Cloud Service

There’s a new approach to managing users for customers who subscribed to Oracle DataFox on or after December 10th, 2020. To know which approach applies to you, go to the Team Management page in settings and look for the Oracle Identity Cloud Service button. If you see the button, that means you will manage users in Oracle Identity Cloud Service and this topic applies to you.
Roles and privileges control the access that users have to different features of the application.

Roles
This table describes the roles that you can assign and the privileges associated with the role.

<table>
<thead>
<tr>
<th>Role</th>
<th>Privileges</th>
</tr>
</thead>
<tbody>
<tr>
<td>DataFox Admin</td>
<td>• Manage users</td>
</tr>
<tr>
<td></td>
<td>• Set up and edit account scoring criteria sets</td>
</tr>
<tr>
<td></td>
<td>• Assign account scoring criteria sets to users</td>
</tr>
<tr>
<td></td>
<td>• Set a default criteria set</td>
</tr>
<tr>
<td></td>
<td>The admin will also have all the privileges of a member.</td>
</tr>
<tr>
<td>DataFox Member</td>
<td>• View and search company profiles</td>
</tr>
<tr>
<td></td>
<td>• View and search signals</td>
</tr>
<tr>
<td></td>
<td>• View and search conferences</td>
</tr>
<tr>
<td></td>
<td>• View account scores</td>
</tr>
<tr>
<td></td>
<td>• Create and view insights reports</td>
</tr>
<tr>
<td></td>
<td>• Create and upload lists</td>
</tr>
<tr>
<td></td>
<td>• Set up alerts</td>
</tr>
<tr>
<td></td>
<td>• View and edit custom fields</td>
</tr>
<tr>
<td></td>
<td>• View team details</td>
</tr>
</tbody>
</table>

Manage Users
To access Oracle Identity Cloud Service from your Oracle DataFox instance and manage users:

1. From the user menu in Oracle DataFox, click Settings, and then click the Team Management tab.
2. On the Team Management page, click Oracle Identity Cloud Service.
   Oracle Identity Cloud Service appears listing the application roles for Oracle DataFox.
3. Go to the navigation menu and click Users.
5. Go to the navigation menu and click Oracle Cloud Services.
6. On the Oracle Cloud Services page, click Oracle DataFox.
7. Click the Application Roles tab and assign either the DataFox Admin or the DataFox Member role to your users.
8. Optionally, add the users to groups for ease of managing users. See Assign Groups to the User Account.

Manage Single Sign-On
This topic applies to you if you subscribed to Oracle DataFox before December 10th, 2020.
If you subscribed after this date and want to enable single sign-on, you can do this in Oracle Identity Cloud Service. For a list of supported single sign-on providers, see Manage Oracle Identity Cloud Service Identity Providers.

Here’s what you can do if you have set up single sign-on to access applications through your identity provider. You can configure Oracle DataFox on your identity provider and ensure that your users use single sign-on to access the application. Oracle DataFox uses SAML 2.0 token to authenticate you to access the application from your identity provider.

Before You Start

- Create users in your identity provider to sign in using single sign-on. Ensure that the users’ email address is the same as the one with which they sign in to their identity provider.
- Ensure you have the user information to hand:
  - User details such as the first name, last name, and user name, which is usually the email address.
  - The URL and certificate from your identity provider to use it while enabling single sign-on.

Enable Single Sign-On

Complete these steps in Oracle DataFox:

1. On the user menu, click **Settings**.
2. On the Integrations menu, select **Single Sign-On (SSO)**.
3. On the Single Sign-On (SSO) page, in the **Identity Provider URL** field, enter the URL from your identity provider.
4. In the **Certificate** field, enter the certificate from your identity provider.
5. Click **Save**.
6. In the SAML Information section, copy the URL. Use this URL while setting up Oracle DataFox in your identity provider.
7. Set the **Enable** switch to **On**.
8. On the Enable SSO dialog box, click **Yes** to enable single sign-on.

Complete these steps in your identity provider:

1. Configure your identity provider using the URL that you copied earlier from the SAML Information section in Oracle DataFox.
   
   **Note:** If you're using the latest version of Google Chrome, update the URL to use **http** instead of **https**. For example, if the SAML information in the URL is https://app.datafox.com/auth/login/saml?account=<accountNumber>, you need to use http://app.datafox.com/auth/login/saml?account=<accountNumber>.

2. Select the following fields to be passed to Oracle DataFox every time your users sign in: FirstName, LastName, and Email.
3. Configure your identity provider to create, update, and delete users authorized to access Oracle DataFox.

   **Note:** Contact your identity provider if you need to use REST API to create, update, and delete users authorized to access Oracle DataFox. For more information, see **Users** in REST API for Oracle DataFox.
What Happens After You Enable Single Sign-On

- You can no longer add, edit, or delete users from the Settings > Team Management page. Use your identity provider to manage users.
- Users can access Oracle DataFox only through the identity provider. If they previously accessed the application directly by going to app.datafox.com, that password no longer works. They must sign in to the identity provider to see all the configured applications and select Oracle DataFox to access the application.
- Only the account owners can sign in directly. If you’re having issues signing through your identity provider, contact your account owner to sign in directly and verify the details on the Single Sign-On (SSO) page in Oracle DataFox.
- Contact your IT department if your users are still unable to sign in to Oracle DataFox through your identity provider even after you have successfully set up single sign-on.

Other Settings

To access settings, click the user menu, and then click Settings. Here’s what you can do on the Settings page.

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Information</td>
<td>Change your user information and password. Depending on your setup, you can change your user information and password on the General Information tab in settings, or click the Change User Info button instead. Clicking this button opens Oracle Identity Cloud Service, where you can change your profile information and password.</td>
</tr>
<tr>
<td>Integrations</td>
<td>Manage your Oracle DataFox integrations across various applications.</td>
</tr>
<tr>
<td>Fields</td>
<td>Create custom fields and select the type of column you want to create. For example, you may create custom columns for headcount, location, top keywords, and so on. See: Bulk Import and Append Custom Info using Custom Columns</td>
</tr>
<tr>
<td>Team Management</td>
<td>Add and delete users and control their access to Oracle DataFox. Depending on your setup, you can either manage users directly on the Team Management page or click Oracle Identity Cloud Service. See: Overview of User Management Note: If you use single sign-on to sign in to Oracle DataFox, you must manage users from your identity provider or Oracle Identity Cloud Service, depending on your setup. You can't manage users on the Team Management page.</td>
</tr>
<tr>
<td>Technographics</td>
<td>View information about the popular technologies on Company Profile pages by selecting a specific technology from the list of filters.</td>
</tr>
<tr>
<td>Silenced Alerts</td>
<td>Silence emails and Slack alerts from individual companies if you want to stop tracking and receiving updates from them. You can always choose to unsilence a silenced company.</td>
</tr>
<tr>
<td>Account Scoring</td>
<td>Select a default account scoring criteria set for your users.</td>
</tr>
</tbody>
</table>
See Assign Account Scoring Criteria Sets.
4 Set Up and Administer Oracle CX Sales Integration

Integrate with Oracle CX Sales

Integrate CX Sales with Oracle DataFox to enrich your accounts, find and prioritize target companies, and source more opportunities. There are steps for you to do in both applications.

- Enrich and sync your account from Oracle DataFox. To do so, connect to Oracle CX Sales, map fields, and bulk-sync accounts.
- Enable the integration in Oracle CX Sales and enable smart talking points.

By integrating with Oracle CX Sales, you can also view details of your enriched accounts from Oracle Sales Assistant.

Before You Start

- You must have valid licenses for Oracle DataFox Cloud Service and Oracle DataFox Enterprise Records Cloud Service.
- It's good practice to create a dedicated user account in Oracle CX Sales for Oracle DataFox. Create a user account in CX Sales and assign the sales administrator job role. To create a user account in CX Sales, see Create Application Users.

  **Note:** Ensure you use the CX Sales user account that's created directly within the application, and not use single sign-on. Accounts linked with single sign-on don't have access to the APIs.

Connect to Oracle CX Sales

1. Sign in to Oracle DataFox.
2. Click your user name, and then click **Settings**.
3. Click **Oracle CX Sales** under **Integrations**.
4. Enter the URL instance and user name and password for the sales admin account you just created.

  **Note:** If you want to change the URL instance in the future, contact Oracle Support.

5. Click **Next**.
6. Click the **Refresh** icon next to the **CX Sales Field** column to get the most updated list of Oracle CX Sales fields.
7. On the Field Mapping tab, map the corresponding fields. Mapping ensures you control the data that you want to enrich in your accounts.
While you’re mapping your fields, note these important points:

- If you don’t find a corresponding field mapping, create a custom field to map. See Add Objects and Fields for information on how to create new fields in Application Composer.
  
  **Note:** If you’re mapping a custom field, the names must exactly match.

- The **Overwrite Existing Data** field is selected by default. All the selected CX Sales fields are overwritten by Oracle DataFox fields during the syncing process.

For a list of field mappings, see Field Mappings.

8. Click **Done**.

9. Contact **Oracle Support** to match all your CX Sales accounts with the corresponding companies in Oracle DataFox and complete the rest of the setup.

You’re now ready to do more with your Oracle DataFox account.

### Field Mappings

Here’s the full list of standard Oracle DataFox fields available for enrichment. This table represents the default mapping of Oracle DataFox Field to Oracle CX Sales Field. Use the **Field Type** and **Max Width** columns to ensure that your fields are defined appropriately.

You can choose another existing **Account** field or create a custom field.

**Note:** Fields unavailable in Oracle CX Sales fields are marked as custom fields. For these fields, create a custom field in Oracle CX Sales and map it to the Oracle DataFox field.
<table>
<thead>
<tr>
<th>Oracle DataFox Field</th>
<th>Field Type</th>
<th>Max Width</th>
<th>Oracle CX Sales Field</th>
<th>Description</th>
<th>Example Output</th>
</tr>
</thead>
<tbody>
<tr>
<td>DataFox Company Id</td>
<td>String</td>
<td>80</td>
<td>DataFox Company ID</td>
<td>The DataFox ID whose data is being enriched into this account.</td>
<td>5130efc98989846a3600107a</td>
</tr>
<tr>
<td>Name</td>
<td>String</td>
<td>NA</td>
<td>Name</td>
<td>The DataFox name for this company. <strong>Note:</strong> This field is synced only once when the account is created from DataFox. You can’t edit this mapping.</td>
<td>Oracle</td>
</tr>
<tr>
<td>Legal Name</td>
<td>String</td>
<td>300</td>
<td>custom field</td>
<td>The legal name of the company. Oracle DataFox doesn’t always have data for this attribute.</td>
<td></td>
</tr>
<tr>
<td>Url</td>
<td>Long Text</td>
<td>2000</td>
<td>URL</td>
<td>The company’s website.</td>
<td>oracle.com</td>
</tr>
<tr>
<td>Street Address Line 1</td>
<td>String</td>
<td>240</td>
<td>Address Line 1</td>
<td>The first line of the street address.</td>
<td>3630 S Geyer Road</td>
</tr>
<tr>
<td>Street Address Line 2</td>
<td>String</td>
<td>240</td>
<td>Address Line 2</td>
<td>The second line of the street address.</td>
<td>Suite 100</td>
</tr>
<tr>
<td>City</td>
<td>String</td>
<td>60</td>
<td>City</td>
<td>The city where the company operates.</td>
<td>St. Louis</td>
</tr>
<tr>
<td>State</td>
<td>String</td>
<td>60</td>
<td>State</td>
<td>The state where the company operates.</td>
<td>MO</td>
</tr>
<tr>
<td>Country</td>
<td>String</td>
<td>2</td>
<td>Country</td>
<td>The country where the company operates.</td>
<td>US</td>
</tr>
<tr>
<td>Zipcode</td>
<td>String</td>
<td>60</td>
<td>Postal Code</td>
<td>The postal code of the company’s address.</td>
<td>63127</td>
</tr>
<tr>
<td>Phone Number</td>
<td>String</td>
<td>60</td>
<td>Raw Phone Number</td>
<td>The company’s phone number.</td>
<td>13149841000</td>
</tr>
<tr>
<td>Description</td>
<td>Text</td>
<td>1500</td>
<td>custom field</td>
<td>A short description of the company.</td>
<td>Oracle Corp. provides enterprise software and computer hardware products and services.</td>
</tr>
<tr>
<td>Number of Employees</td>
<td>Number</td>
<td>NA</td>
<td>Number of Employees</td>
<td>An estimate of total employees.</td>
<td>21000</td>
</tr>
<tr>
<td>Revenue Estimate</td>
<td>Number</td>
<td>15</td>
<td>Current Fiscal Year’s Potential Revenue</td>
<td>An estimate of the company’s annual revenue.</td>
<td>2837845000</td>
</tr>
<tr>
<td>Stock Ticker</td>
<td>String</td>
<td>20</td>
<td>Stock Symbol</td>
<td>The company’s stock symbol.</td>
<td>ORCL</td>
</tr>
<tr>
<td>Keywords</td>
<td>Text</td>
<td>Custom Field</td>
<td>Description</td>
<td>Sample Value</td>
<td></td>
</tr>
<tr>
<td>----------</td>
<td>------</td>
<td>--------------</td>
<td>-------------</td>
<td>--------------</td>
<td></td>
</tr>
<tr>
<td><strong>Keywords</strong></td>
<td><strong>Text</strong></td>
<td><strong>1500</strong></td>
<td>custom field</td>
<td>A comma delimited list of the company's top keywords.</td>
<td>software, cloud, computer, enterprise software, information technology</td>
</tr>
<tr>
<td><strong>Industry</strong></td>
<td><strong>String</strong></td>
<td><strong>300</strong></td>
<td>Ignore</td>
<td>The industry code that represents the category. It's recommended that you select Ignore to get both the industry and subindustry codes from Oracle DataFox. You must make additional configurations to get industry hierarchy codes from Oracle DataFox and translate the code to a label in CX Sales. For details, see Set Up Industry Hierarchy Labels in CX Sales.</td>
<td>ORA_DF_INDUSTRY_028</td>
</tr>
<tr>
<td><strong>Subindustry</strong></td>
<td><strong>String</strong></td>
<td><strong>300</strong></td>
<td>Industry Code</td>
<td>The subindustry category of the company. It's recommended that you select Industry Code to get both the industry and subindustry codes from Oracle DataFox. You must make additional configurations to get industry hierarchy codes from Oracle DataFox and translate the code to a label in CX Sales. For details, see Set Up Industry Hierarchy Labels in CX Sales.</td>
<td>ORA_DF_SUBINDUSTRY_211</td>
</tr>
<tr>
<td><strong>NAICS Code</strong></td>
<td><strong>String</strong></td>
<td><strong>300</strong></td>
<td>custom field</td>
<td>The NAICS (North American Industry Classification System) code.</td>
<td>722511</td>
</tr>
<tr>
<td><strong>NAICS Code Description</strong></td>
<td><strong>String</strong></td>
<td><strong>300</strong></td>
<td>custom field</td>
<td>The NAICS (North American Industry Classification System) description.</td>
<td>Full-service Restaurants</td>
</tr>
<tr>
<td><strong>DataFox Company Url</strong></td>
<td><strong>String</strong></td>
<td><strong>300</strong></td>
<td>custom field</td>
<td>Link to the company profile in the DataFox web application.</td>
<td><a href="http://app.datafox.com/oracle">http://app.datafox.com/oracle</a></td>
</tr>
<tr>
<td><strong>Linkedin Url</strong></td>
<td><strong>String</strong></td>
<td><strong>300</strong></td>
<td>custom field</td>
<td>The company's LinkedIn ID number.</td>
<td><a href="http://www.linkedin.com/company/90">http://www.linkedin.com/company/90</a></td>
</tr>
<tr>
<td><strong>Crunchbase Url</strong></td>
<td><strong>String</strong></td>
<td><strong>300</strong></td>
<td>custom field</td>
<td>The company's Crunchbase slug.</td>
<td><a href="https://www.crunchbase.com/organization/oracle">https://www.crunchbase.com/organization/oracle</a></td>
</tr>
<tr>
<td><strong>Account Score</strong></td>
<td><strong>Number</strong></td>
<td><strong>NA</strong></td>
<td>Account Score</td>
<td>The numeric value that indicates the score for an account.</td>
<td>250</td>
</tr>
<tr>
<td><strong>Account Scoring Tier</strong></td>
<td><strong>String</strong></td>
<td><strong>30</strong></td>
<td>Account Scoring Tier</td>
<td>A tier is an admin-defined grouping of scores. The admin can set threshold for Tier 1, 2, and so on. so that all of sales and marketing have a shared understanding of account priority.</td>
<td>Tier 1</td>
</tr>
<tr>
<td><strong>EIN</strong></td>
<td><strong>String</strong></td>
<td><strong>20</strong></td>
<td>Taxpayer Identification Number</td>
<td>The unique identifier for IRS (US only).</td>
<td>42723701</td>
</tr>
<tr>
<td><strong>CIK</strong></td>
<td><strong>String</strong></td>
<td><strong>100</strong></td>
<td>custom field</td>
<td>The unique identifier for SEC (US only).</td>
<td>0000724606</td>
</tr>
<tr>
<td><strong>UK Registration</strong></td>
<td><strong>String</strong></td>
<td><strong>100</strong></td>
<td>custom field</td>
<td>The unique identifier for Companies House (United Kingdom's registrar of companies).</td>
<td>12345678</td>
</tr>
<tr>
<td><strong>Year Founded</strong></td>
<td><strong>Integer</strong></td>
<td><strong>NA</strong></td>
<td>Year Established</td>
<td>The year in which the company was established.</td>
<td>1981</td>
</tr>
<tr>
<td>Data Element</td>
<td>Data Type</td>
<td>Custom Field</td>
<td>Description</td>
<td>Value</td>
<td></td>
</tr>
<tr>
<td>--------------</td>
<td>-----------</td>
<td>--------------</td>
<td>------------------------------------------------------------------------------</td>
<td>----------------</td>
<td></td>
</tr>
<tr>
<td>Last Synced Date</td>
<td>Date</td>
<td>NA</td>
<td>The most recent date when this account was last enriched or synced.</td>
<td>2019-08-20T18:04:02.461Z</td>
<td></td>
</tr>
<tr>
<td>DataFox Slug</td>
<td>String</td>
<td>60</td>
<td>The name of the company as used in the DataFox URL. Format is <a href="https://app.datafox.com/companies/%5Bslug%5D/overview">https://app.datafox.com/companies/[slug]/overview</a></td>
<td>oracle</td>
<td></td>
</tr>
<tr>
<td>Domestic Ultimate Parent DataFox Id</td>
<td>String</td>
<td>80</td>
<td>The ID of the highest level of parent Company (in this Company’s jurisdiction or country).</td>
<td>5130efce8989846a36001c9e</td>
<td></td>
</tr>
<tr>
<td>Domestic Ultimate Parent DataFox Slug</td>
<td>String</td>
<td>60</td>
<td>Name of the highest level of the parent company (in this Company’s jurisdiction or country) as used in the DataFox URL.</td>
<td>sirius</td>
<td></td>
</tr>
<tr>
<td>Domestic Ultimate Parent Name</td>
<td>String</td>
<td>300</td>
<td>Name of the highest level of the parent company (in this Company’s jurisdiction or country).</td>
<td>First Software, Inc.</td>
<td></td>
</tr>
<tr>
<td>Domestic Ultimate Parent Revenue Estimate</td>
<td>Number</td>
<td>15</td>
<td>The revenue estimate for the highest level of the parent company (in this Company’s jurisdiction or country).</td>
<td>155900000000000</td>
<td></td>
</tr>
<tr>
<td>Domestic Ultimate Parent Number of Employees</td>
<td>Number</td>
<td>NA</td>
<td>Employee estimate for the highest level of parent Company (in this Company’s jurisdiction or country).</td>
<td>27000</td>
<td></td>
</tr>
<tr>
<td>Global Ultimate Parent DataFox Id</td>
<td>String</td>
<td>80</td>
<td>The ID of the highest level of the parent company (worldwide).</td>
<td>5130efce8989846a36001c9e</td>
<td></td>
</tr>
<tr>
<td>Global Ultimate Parent DataFox Slug</td>
<td>String</td>
<td>60</td>
<td>Name of the highest level of the parent company (worldwide) as used in the DataFox URL.</td>
<td>sirius</td>
<td></td>
</tr>
<tr>
<td>Global Ultimate Parent Name</td>
<td>String</td>
<td>300</td>
<td>Name of the highest level of the parent company (worldwide).</td>
<td>First Software, Inc.</td>
<td></td>
</tr>
<tr>
<td>Global Ultimate Parent Revenue Estimate</td>
<td>Number</td>
<td>15</td>
<td>The revenue estimate for the highest level of the parent company (worldwide).</td>
<td>155900000000000</td>
<td></td>
</tr>
<tr>
<td>Global Ultimate Parent</td>
<td>Number</td>
<td>NA</td>
<td>Employee estimate for the highest level of the parent company (worldwide).</td>
<td>27000</td>
<td></td>
</tr>
</tbody>
</table>
If you don't find a corresponding field mapping, create a custom field to map. See Add Objects and Fields for information on how to create fields in Application Composer. When you disconnect an account, only the data in the DataFox Company ID, URL, Account Score, and Account Score Tier fields is removed from the Oracle CX Sales account.

## Set Up Industry Hierarchy Labels in CX Sales

You can map the industry and subindustry codes from Oracle DataFox to be displayed as labels in CX Sales. Here's how you can set up the default industry code lookup file for CX Sales to show the industry hierarchy codes from Oracle DataFox.

**Note:** These steps will impact the existing codes in the Industry field for CX Sales.

1. Sign in to Oracle CX Sales as a Sales Administrator.
2. In the Setup and Maintenance work area, make these selections:
   - Offering: Sales
   - Functional Area: Sales Foundation
   - Task: Manage Administrator Profile Values
3. In the Search: Profile Option region, Profile Option Code field, enter MOT_INDUSTRY_CLASSCATEGORY. If you don't see the classification category you need, you can add additional classification categories to this list.
4. Click Search.
5. In the MOT_INDUSTRY_CLASSCATEGORY region, set the Site Profile Level option to ORA_HZ_DATAFOX_INDUSTRY.
6. Click Save and Close.
7. Sign in to your Oracle DataFox application that is integrated with CX Sales.
8. Click your user name, and then click Settings.
9. Click Integrations > Oracle CX Sales > Field Mapping.
10. Select these mappings on the Field Mapping page to view both the industry and subindustry labels.

<table>
<thead>
<tr>
<th>Oracle DataFox Field</th>
<th>Oracle CX Sales Field</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Industry</td>
<td>Ignore</td>
<td>Code ORA_DF_INDUSTRY_028 from Oracle DataFox is displayed as Financial Services industry and the code ORA_DF_SUBINDUSTRY_211 is displayed as Securities, Commodity Contracts, and Related Activities subindustry in CX Sales.</td>
</tr>
<tr>
<td>Subindustry</td>
<td>Industry Code</td>
<td></td>
</tr>
</tbody>
</table>

Alternatively, if you want to see only the industry label, select these mappings.
Oracle DataFox Field | Oracle CX Sales Field | Example
---|---|---
Industry | Industry Code | Code ORA_DF_INDUSTRY_028 from Oracle DataFox is displayed as Financial Services industry in CX Sales.
Subindustry | Ignore |

11. Click **Save**.
12. Sync your Oracle DataFox and CX Sales accounts.
13. In CX Sales, go to the Edit Account page.
   The **Industry** field displays the industry or subindustry depending upon your selection.
14. Click the subindustry label to see the parent industry if you have set up both the industry and subindustry labels.

If you want to know more about classification categories and codes, see *Classification Components*.

### Bulk Sync Accounts

You can update thousands of accounts each day in Oracle CX Sales with the latest company data from Oracle DataFox.

By default, up to 10,000 accounts are updated each day, but you can adjust the account limit and frequency. You can set up the sync account limit and frequency using bulk syncs.

**Note:** If you’re signing into Oracle DataFox using Oracle Cloud, only accounts where the DataFox data has been updated since the last refresh will be synced. To know if you’re using Oracle Cloud, go to the Team Management page in Settings. If you see the **Oracle Identity Cloud Service** button, you know you’re signing in using Oracle Cloud.

In the Bulk Sync History section, you can see the total number of accounts synced, who initiated the sync, and the sync status. You can also see when the sync was scheduled and completed, displayed in your local time. When the sync is complete, you see a link to a diagnostic report in the section.

- A Success Report confirms that all the accounts were synced.
- An Exception Report provides troubleshooting information if some accounts couldn’t be synced.

### Before You Start

The bulk sync history displays the number of accounts synced only when the relevant profile option is set to **No**. Before you start the bulk sync, check the profile option setting. Here’s how:

1. Sign in to Oracle CX Sales as a Sales Administrator.
2. In the Setup and Maintenance work area, make these selections:
   a. Offering: Sales
   b. Functional Area: Sales Foundation
   c. Task: Manage Administrator Profile Values
3. In the Search: Profile Option region, **Profile Option Code** field, enter **ZCA_IMPORT_SUPPRESS_SUCCESSLOG_GENERATION**.
4. Click **Search**.
5. In the ZCA_IMPORT_SUPPRESS_SUCCESSLOG GENERATION: Profile Values region, set the **Site** Profile Level option to **No**.
6. Click **Save and Close**.

You can now configure bulk syncs.

### Set the Bulk Sync

To set the bulk sync frequency and view the sync history for your accounts, navigate to **Settings > Integrations > Oracle CX Sales > Bulk Syncs**.

It's recommended that you set the frequency based on the number of accounts in your Oracle CX Sales. This ensures that all the accounts are synced on a regular basis.

For example, let's say you have 60,000 Oracle CX Sales accounts and you set the bulk sync frequency to sync 10,000 accounts each day. This means that all your accounts are synced at least once a week.

You could also set the frequency to 5000 accounts per day to sync data only once in 2 weeks.

### Enable Oracle DataFox Features in CX Sales

You must enable the Oracle DataFox integration in CX Sales for your accounts to be enriched.

1. Sign in to Oracle CX Sales.
2. Go to the **Setup and Maintenance** work area.
3. On the Setup page, select **Sales** as the offering.
4. From the Functional Area list, select **Integrations**. You can enable a functional area if it's not listed. For details, see **Configure Offerings**.
5. Click the task **Manage DataFox Data Enrichment Integration**.
6. On the Manage DataFox Data Enrichment Integration page, enter your Oracle DataFox credentials.
7. Click **Save and Close**.
You have enabled Oracle DataFox data integration. Here’s what you can do next.

- Enable your salespeople to enrich specific accounts from the Edit Account page.
- View smart talking points from Oracle Sales Assistant.

### Enable Account Enrichment from Oracle CX Sales

Your salespeople can enrich specific accounts from their CX Sales application instead of waiting for the nightly Oracle DataFox sync jobs.

To enable the option to enrich data from CX Sales, navigate to the **Manage DataFox Data Enrichment Integration** task and select **Enable Data Enrichment from DataFox**.

Your salespeople can now go to the Edit Account page, click the **Actions** list, and then select **Enrich Account**, as shown in the screenshot.

![Edit Account: CrowdStrike: Overview](image)

### View Smart Talking Points in Oracle Sales Assistant

Your salespeople can get signals and account scores in Oracle Sales Assistant.

### Enable Smart Talking Points in Oracle CX Sales

Your salespeople can use the Smart Talking Points feature in Oracle CX Sales to prioritize target accounts and get the latest information on prospects. Salespeople can view the account score and news signals in the Account Intelligence tab on the Accounts page. You can also enable the tab on the Opportunities page so that salespeople can access this information.

You must create a mashup for smart talking points using Application Composer to enable the feature in Oracle CX Sales. Before you start, it’s important to understand what a mashup is. It’s a way to integrate another web application so that your users can view and use that application without leaving Oracle CX Sales. For more information, see *Overview of Mashups*.
Here’s what you must do before you create a mashup in Oracle CX Sales:

- Ensure that you have access to Application Composer. Usually, the Sales Administrator job role provides access to Application Composer, but the permissions may be set up differently for your company.
- Create a sandbox and set it as active. For more information, see Create and Activate Unified Sandboxes.
  - After you activate the sandbox, ensure you activate Application Composer. To do so, go to the Create Sandbox page, and select Application Composer in the All Tools section.

Follow these steps to set up Oracle CX Sales with Account Intelligence mashup content:

1. Use the URL parameter to register Account Intelligence as an external web application. For details, see Register Your Web Application.
2. Embed the registered Account Intelligence tab into the Summary tab. For details, see Embed the Web Application as a New Subtab.

See also:

- Account Scores
- News Signals

Register Your Web Application

1. In Application Composer’s Common Setup menu, or on the Overview page, click Mashup Content.
2. On the Web Applications page, click Register Web Application.
3. Enter the name of the web application you want to integrate. For example, Account Intelligence.
   
   **Note:** Oracle recommends that you name the web application as Account Intelligence. However, you may choose a different name.
4. Select the type of application as Parameter-based.
5. Enter the web application URL that’s sent to you when you begin using Oracle DataFox, in the URL Definition field. If you don’t have it, contact Oracle Support.
6. Optionally, you can also perform these actions:
   - Hide the Account Score section if your company isn’t using account scoring. To do so, in the URL Definition field, append the ?accountScore=0 value after you specify the URL. You can use any value other than 1 to hide the Account Score section, however the preferable value is 0. Your salespeople continue to see the Account Score section, if you append ?accountScore=1 after you specify the URL or don’t specify this parameter at all.
   - Filter the types of signals you want your salespeople to see by using the signalsFilter parameter. To do so, in the URL Definition field, append ?signalsFilter=<signal tags> after you specify the URL.
   - Hide the Account Score section and also filter the signal types. To do so, in the URL Definition field, append ?signalsFilter=<signal tags>&accountScore=0 after you specify the URL.

   For example, to hide the Account Score section and remove the news on signals where companies exhibit, present, or attend an event, append ?signalsFilter=conference-exhibitor,conference-presenter,conference-attendee&accountScore=0 after the URL definition.

   For more information on signal types and tags, see Overview of Company Signals.
7. In the URL Parameters section, click Add and specify companyld as the parameter for the web application.
Note: Your application displays the URL parameters that you add here at the time of embedding the web application into an actual page, where you can specify the page values for the URL parameter. The parameter name is case-sensitive.

This image illustrates the Register Web Application screen with the companyld parameter.

8. Click Save and Close. The mashup content is created.
You have successfully registered the web application as a mashup content.

Embed the Web Application as a New Subtab

Here's a simple example of how you can embed your web application as a new subtab. For more information on extending applications in Application Composer, see Add Objects and Fields.

1. In Application Composer, navigate to Standard Objects > Account > Pages.
2. In the Details Page Layout section, click the Duplicate Details Page Layout icon.
3. Enter a name for the new layout and select Standard Layout from the Source Layout list.
4. Click Save and Close. The layout for the new subtab is created.
5. In the Details Page Layout section, click the layout you just created.
6. Scroll to the bottom of the layout and click Add to add a subtab.
7. On the Create Subtab page, select Mashup Content, and click Next.
8. Select the Account Intelligence mashup content you created earlier and click Insert.
9. Enter a display label. Oracle recommends you set this as Account Intelligence.
10. From the URL Parameters list, map the parameter companyld to the value DataFox Company ID. If you have set a different value for the DataFox Company ID, select that value from the list.

This screenshot displays the mapping screen where you can map companyld to the value from the Value list.
11. Optionally, add an icon for the subtab.

12. Click Save and Close.

13. Optionally, from the Additional Layouts page, select any other layout that you want to embed the mashup into. To do so, move the layout from the Available Layouts list to the Selected Layouts list.

14. Click Save and Close.

After you review and publish the Sandbox configuration, you can view the smart talking points in Oracle CX Sales. This screenshot shows the account score and news signals in the Account Intelligence tab on the Edit Account page.
5 Set Up and Administer Salesforce Integration

Integrate with Salesforce

The current version of the installation package is DataFox Orchestrate v1.41.

You can use these links to install the package for either production or sandbox from the Salesforce AppExchange.

- **Production**: Salesforce Production
- **Sandbox**: Salesforce Sandbox

If you face IP restrictions for your Salesforce integration with DataFox, use the 192.29.97.49 IP connector to allow Oracle DataFox IPs. You can use the refresh token or session timeout value settings while you’re using this connector.

Before You Start

Here are the prerequisites to install and use the DataFox Sync package for Salesforce.

- You must have valid licenses for Oracle DataFox Cloud Service, Oracle DataFox Enterprise Records Cloud Service, and Oracle DataFox Connector Cloud Service for Salesforce.
- You must have a valid license for Professional, Enterprise, Unlimited, Force.com, Developer, or Performance editions of Salesforce.
  - **Note**: If you use the professional edition, you will need API access.
- You must have admin privileges for installation.

Installation

1. Sign in to Salesforce.
2. Navigate to the production or the sandbox link provided earlier in this topic to initiate the installation of the current version of the DataFox Sync package.

   If you’re installing the integration for your sandbox instance, make sure you use your sandbox credentials.

3. Select **Install for All Users** and click **Install**.
   - **Note**: Ensure to Install for All Users.

   A loading indicator informs you that the package is being installed.

   The Installation may take a while to complete. You’re notified via email when the installation completes. Otherwise, you see an Installation Complete message.

You have now successfully installed the Oracle DataFox Sync package for Salesforce.
Set Up the Canvas App for Oracle DataFox

Salesforce users can use the Salesforce Canvas application to see Oracle DataFox data in the Account, Contact, or Lead pages. The application is available in the Oracle DataFox Sync package.

Here's how you can set up the Canvas app for Oracle DataFox.

1. Select the **Connected Apps** menu.
   - If you're using Salesforce Classic, click **Setup**. From the Administer navigation menu, select **Manage Apps > Connected Apps**.
   - If you're using Salesforce Lightning Experience, click **Setup**. On the Setup page, in the Platform Tools section, click **Apps > Connected Apps > Manage Connected Apps**.

2. On the Manage Connected Apps page, click the **DataFox** link.
   
   This shows information about the DataFox Connected App.

3. Click **Edit Policies**.

4. In the OAuth policies section, from the **Permitted Users** list, select **Admin approved users are pre-authorized**.

5. In the message dialog box, click **OK**.

6. Click **Save**.

7. On the Connected App Details page, in the Profiles section, click **Manage Profiles**.

   ![Manage Profiles](image)

8. On the Application Profile Assignment page, select the profiles that you want to grant access to the Canvas application.

9. Click **Save**.

You have now set up the Canvas app and granted access to the DataFox Connected App for all the profiles that you selected.

Set Up Account Layout

Let's see how to add the DataFox News Visualforce page to the Account layout. Adding the page to the Contact and Lead layouts is similar. You must start from the Setup.

1. Navigate to **Build > Customize > Accounts > Page Layouts**.
2. Click the **Edit** link under Account Page Layouts.
   
   The Account Layout edit page appears.

3. Add a new section to the account layout and name it appropriately (for example, DataFox) and select the **1-Column** layout.
4. Click **OK**. You now see a new empty section with the name you selected. Now you can add the DataFox News Visualforce Page to this new section.

5. Navigate to **Visualforce Pages**, as shown in this screenshot, and drag the **DataFox News** page into the new section.

![Visualforce Pages](image)

You see the DataFox News Visualforce page in the new section.

6. Hover over the DataFox News Visualforce page you created and click the wrench icon to edit the page properties.

7. Set the properties to have 100% width, 400 pixels height, and select **Show scrollbars**. Click **OK**.

8. Click **Save**.

You should now see the new section on every Account page.

To see the content within the canvas app, you must sign in to Oracle DataFox and connect to Salesforce.

### Set Up Contact Layout

To set up contact layouts:

1. Navigate to **App Setup > Customize > Contacts > Page Layouts**.
2. Click the **Edit** link under Contact Page Layouts.
3. Drag the **Section** box down to the Contact Layout and name it appropriately (for example, DataFox) and select the **1-Column** layout.
4. Click **OK**. You see a new empty section with the name you selected.

![DataFox](image)

Now you can add the DataFox News Visualforce Page to this new section.

5. Navigate to **Visualforce Pages**, and drag the **DataFox News** page into the new section.
You now see the DataFox News Visualforce page in the new section.

6. Hover over the DataFox News Visualforce page you just created and click the wrench to edit the page properties. Set the properties to have 100% width, 400 pixels height, and select Show scrollbars. Click OK.
7. Click Save to save the layout page.

You now see the new section on every Contact page.

To see the content within the canvas app, you must sign in to Oracle DataFox and connect to Salesforce.

Set Up Leads Layout

1. Navigate to Build > Customize > Leads > Page Layouts.
2. Click the Edit link under Lead Page Layouts.
3. Add a new section from Fields, as shown in this screenshot.

4. Add a new Section to the Leads Layout by dragging and dropping. Name it appropriately (for example, DataFox) and select the 1-Column layout.
5. Click OK. You see a new empty section with the name you selected. Now let's add the DataFoxNews Visualforce Page to this new section. Navigate to Visualforce Pages and drag the DataFoxNews page into the new section.
You see the DataFoxNews Visualforce page in the new section.

6. Hover over the DataFoxNews Visualforce page you just created and click the wrench to edit the page properties. Set the properties to have 100% width, 400 pixels height, and select Show scrollbars. Click OK.

7. Click Save to save the layout page.

You now see the new section on every Leads page.

To see the content within the canvas app, you must sign in to Oracle DataFox and connect to Salesforce.

Connect Oracle DataFox to Salesforce

Before you can sync your Salesforce accounts, as a one-time activity, connect to Salesforce to use the Oracle DataFox sync functionality. From the Oracle DataFox Settings page for Salesforce, click Connect to sync companies between Oracle DataFox and Salesforce. After you connect to Salesforce, you can see information in the DataFoxNews canvas app.

**Note:** Oracle recommends that you use a dedicated Salesforce user account to set up this connection.

After you’re connected, the DataFox for Salesforce page shows that you’re connected, with the option to reconnect in case of connection issues.
By default, your salespeople can also connect to their Salesforce account from the Oracle DataFox Settings page. Contact Oracle Support if you decide to remove the ability from your salespeople to connect, sync, or refresh their Salesforce accounts.

You can sync companies in Oracle DataFox as accounts in Salesforce. You can also add Oracle DataFox data to contacts or leads in Salesforce. For example, you can sync Crowdstrike in Oracle DataFox to the Crowdstrike account you already have in Salesforce. This screenshot shows that you have all the information synced from Oracle DataFox along with the DataFox iFrame.

Note: Allow third-party cookies in Chrome if you’re not able to see the iFrame. To know how to change the cookie settings, see Change your cookie settings in the article Clear, enable, and manage Cookies in Chrome.

Oracle DataFox Sync

The real power of the Oracle DataFox Sync package is in enabling data sync between Oracle DataFox and Salesforce. The main configuration step is in defining the field mappings. You can dedicate one user account to work on the bulk
enrichment updates. You must provide the user account with permissions to authenticate Oracle DataFox and read-write access to all the fields that are being enriched by Oracle DataFox. It’s not mandatory but it’s recommended that you use a service account to track Oracle DataFox updates.

**DataFox Settings**

Go to the DataFox Settings tab. If the tab isn’t available, click the **Add** icon, to get to all the tabs you have available, including the DataFox Settings tab.

From the DataFox Settings tab, you can set the mappings of fields from DataFox to Salesforce when syncing companies as accounts and people as contacts or leads.

**Field Mappings**

The configuration is already pre-populated with reasonable mappings.

| Note: | Some Salesforce fields have the dfox__ prefix. These are fields that are bundled in the Oracle DataFox Sync package since they don’t have default counterparts in Salesforce. |

The address fields are special because of the dependence between countries and states. This is due to the **State and Country Picklists** that are often enabled in Salesforce organizations. Because of the nature of the address fields, it’s important that they’re mapped to parts of the same address field within Salesforce (the default is to map to the BillingAddress).

The **Overwrite** option determines whether syncing from Oracle DataFox to Salesforce overwrites the corresponding Salesforce field if the Salesforce field is already populated. By default, the **Overwrite** option is selected for the Oracle DataFox fields, and not for the Salesforce fields. You notice that the only field mappings set to overwrite are the new Oracle DataFox fields and new Salesforce fields with no data.

You can also choose not to populate any Salesforce fields from an Oracle DataFox field by selecting **None** from the **Salesforce Field** drop-down list for that Oracle DataFox field.

Contact Salesforce if you accidentally overwrite Salesforce data. Oracle DataFox doesn’t maintain a backup of Salesforce data fields.

**Oracle DataFox Custom Fields**

To make use of the custom Oracle DataFox fields when using the Oracle DataFox Sync package, it’s very useful to add a new section with the custom fields to the account, contact, and lead layouts. In this example, let’s look at the Account layout.

1. From the **Build** section, go to **Customize > Accounts > Page Layouts**.
2. On the Account Layout page, click **Edit**.
3. Create a section on the account page by dragging a section from the edit bar. In the Section Properties dialog box, name the section (for example, DataFox Info) and select the **2-Column** layout.
4. Add the custom Oracle DataFox fields to this new section by dragging them from the **Fields** section of the edit bar. The custom Oracle DataFox fields start with DF.
5. Click **Save** after adding the custom Oracle DataFox fields.
Instant Triggers

The Oracle DataFox instant sync is disabled by default. You can enable instant sync for ongoing enrichment.

- **Instant Sync Enabled - On Create**: Select this option to automatically match and immediately enrich newly created Salesforce records with Oracle DataFox firmographic data (according to your specified field mappings).
- **Instant Sync Enabled - On Update**: Select this option to continuously enrich synced records with Oracle DataFox's firmographic data.
- **Instant Sync Enabled - On Delete**: Select this option to disconnect deleted Salesforce records from Oracle DataFox.
- **Instant Sync Enabled - On Undelete**: Select this option to reconnect undeleted Salesforce records and enrich with Oracle DataFox firmographic data.

Custom fields in Salesforce are synced to Oracle DataFox in the next scheduled bulk sync.
The trigger sync is controlled on creation when new records are established, or on update when records are revised. Currently, Oracle DataFox doesn’t support conditional or rule-based updates for instant syncing.

You can set **Max Updates Frequency** on a per record basis to limit syncs during certain time frames. For example, if you set the frequency to update every hour, Oracle DataFox updates the record hourly regardless of the number of revisions within the hour. Of course, if a new record comes in or another record is revised, they’re updated immediately.
Match Accounts That Aren't Already Synced to Oracle DataFox

After the sync, sign in to Salesforce and search for an account. You may notice that you have accounts in Salesforce that are not yet matched with Oracle DataFox. When this happens, you can search for a matching account, and match within Salesforce to increase the account match rate. Here's how you can do this.

1. In Salesforce, search for unmatched accounts by name or run a report to find accounts without a DataFox ID.
2. Open an account and scroll to the DataFox News section, which is on the Details tab in Lightning Experience.
3. If there are any suggested matches from DataFox, click **Connect Company to this Account**.
4. If there are no suggested matches, sign into DataFox and manually search for the company on the Company Search page.
   - If the company exists, click **Sync**.
   - If it doesn’t exist, you can request to add the company to DataFox. On the user menu, click **Submit Company**.

Change Your Salesforce Sync User

Bulk Sync uses the Salesforce sync user’s account for enrichment updates. You may want to change the sync user in certain instances. For example, the sync user might no longer be with your organization.

1. Go to **Settings > Integrations > Salesforce**.
2. On the DataFox for Salesforce page, click **Auth Settings**.
3. From the Sync Settings section, select the user that you want as the sync user.

   **Note:** Ensure that the user you select as the sync user has rights to view, edit, and create accounts, leads, and contacts in Salesforce for accounts to sync successfully.

Create Parent-Child Relationship for Accounts

You can show the relationships between parent and child accounts to your sales reps on the Account Detail page in Salesforce. Here’s how you can set up or edit the parent account.

If you’re using Salesforce Classic:

1. On the Account Detail page, click **Edit**.
2. On the Account Edit page, for the **Parent Account** field, click the **Parent Account Lookup** icon.
3. In the Lookup dialog box, enter the name of the parent account and click **Go!**.
4. From the search results, select the parent account.
5. Click **Save**.

If you’re using Salesforce Lightning Experience:

1. On the Account page, click the Details tab.
2. In the **Parent Account** field, click the **Edit** icon.
3. Click the **Lookup** icon to search for a parent account.
4. Click **Save**.

### Create an Oracle DataFox Account Hierarchy

You can use any Salesforce data loader to create parent-child relationships in Salesforce based on the data from Oracle DataFox.

### Before You Start

Ensure that all the Salesforce accounts that you want included in the hierarchy report are synced with Oracle DataFox without errors. If an account isn’t synced or has sync errors, it won’t appear in the hierarchy report.

1. Contact Oracle Support to get the Hierarchy report. The report contains the **Child SFDC Account ID** and **Level 1 Parent SFDC Account ID** fields.
2. Analyze the Hierarchy report and create a CSV file with the **Child SFDC Account ID** and **Level 1 Parent SFDC Account ID** fields. For details, see **Analyze the Parent-Child Account Sync**.
   
   **Note:** If a parent or child account is missing in the report, you must first add the account in Salesforce. Upload a list in Oracle DataFox with the missing accounts using the DataFox ID. You can then bulk sync all the missing accounts from Oracle DataFox to Salesforce.

After you create the CSV file, use the Salesforce data loader tool to load bulk data in Salesforce. This example uses DataLoader.io. Here’s how you can use a data loader to create parent-child relationships in Salesforce.

1. Open DataLoader.io and sign in to your Salesforce account.
2. Click **New Task > Import**.
3. From the **Operation** menu, click **Update**.
4. From the **Object** menu, select **Account** and click **Next**.
5. Click **Upload CSV** and upload the CSV file with child and parent account IDs.
6. On the Mapping page, map the **Child SFDC Account ID** field to the **Account ID** field.
7. Map the **Level 1 Parent SFDC Account ID** field to the **Parent Account ID** field as shown in this screenshot.

8. Click **Next**.
9. Click **Save and Run**.
10. After the process completes, check Salesforce to make sure the child accounts are now mapped to the correct parent accounts.

### Analyze the Parent-Child Account Sync
This table illustrates the different scenarios related to the parent-child accounts sync in Salesforce.

<table>
<thead>
<tr>
<th>Scenario</th>
<th>Action</th>
</tr>
</thead>
</table>
| The parent account doesn’t exist in Salesforce | Sync parent to Salesforce and connect child to parent. Sync the parent to the Salesforce account and connect the child account to the parent account. You can perform any of these tasks.  
  - Create a parent account in Salesforce by syncing with the related Oracle DataFox company profile. You can then connect the existing child account to the parent account.  
  - Add the parent accounts in Salesforce. Use the **Upload List** option in Oracle DataFox to upload a list with the missing parent accounts, using the DataFox ID. You can then bulk sync to sync all accounts from Oracle DataFox to Salesforce. |
| The parent and child accounts exist but aren’t connected | Review and connect child to parent  
Review the parent and child accounts that already exist in Salesforce. You can then connect the accounts. |
| The child account is connected to a parent account which is different from the account identified by Oracle DataFox | Review and connect child to different parent  
The existing account in Salesforce is connected to a parent account, but Oracle DataFox identified a different parent account. You can review and reconnect to the correct parent. |
| The child account is connected to the appropriate parent account | No action: connected to parent  
No action is required. The parent and child accounts are already connected and synced to Oracle DataFox. |

**Guidelines for Integrating Custom Data**

This topic is meant for Salesforce users only.

**The Importance of Unique Data**

The Oracle DataFox Account Score allows you to take custom information from your Salesforce or other sources to create a unique, accurate methodology to bubble up your best fit accounts.
Sync Account Fields from Salesforce to Oracle DataFox

As an admin, you can sync fields from Salesforce into Oracle DataFox, which can then be used as filters. The same filters can be used for account scoring.

**Note:** Ensure that you don't select any fields with Personally Identifiable Information (PII). PII is any information that's used to uniquely identify a contact or locate a person such as social security numbers, addresses, phone numbers, and so on. Oracle DataFox doesn't use any PII data to filter companies or score them.

Let's see how to integrate your Salesforce fields.

1. Sign in to Oracle DataFox.
2. Go to **Settings > Integrations > Salesforce**.
3. On the DataFox for Salesforce page, click **Synced Fields**.

   All your currently integrated Salesforce fields are displayed.

You can scroll through the fields and select the fields that you think are valuable to your Account Scoring criteria.

**Note:** When you select your preferred criteria, it takes at least 24 hours to update your Oracle DataFox instance.

Integrate Salesforce Fields from Custom Spreadsheets

You can import custom lists or spreadsheets into Oracle DataFox to get granular results. These lists can be sourced from Excel or CSV files, online sources, or lists you send to Oracle Support.

**Note:** Ensure that you don't select any fields with Personally Identifiable Information (PII). PII is any information that's used to uniquely identify a contact or locate a person such as social security numbers, addresses, phone numbers, and so on. Oracle DataFox doesn't use any PII data to filter companies or score them.

To learn more about importing lists, see **Import Company Lists**.

CRM Insights

You can enhance your accounts in Salesforce with actionable business insights and intelligent workflows.

Discover Accounts with Summaries

With Oracle DataFox Insights, find key firmographic information about your current customers, and locate similar companies worth targeting with only a couple of mouse clicks.

You can get to the Insights tab from a saved list or company search inside of Oracle DataFox. In the example below, let's create a search based on information from our Salesforce instance.

Let's start by filtering a company search focused on companies owned by a specific sales rep at a prospect tier of 1 or 2. Let's ask Oracle DataFox to gather a list of known companies that we believe will get the best value for our product.
Let's click the Insights tab to learn more about the prospects. Afterward, click any of the checkboxes on this page to select criteria for a new search based on the trends in the current prospects.

The Insights on this particular set indicates that most of these companies are in the SaaS and Finance space, with between 10 and 200 customers, and up to $5M in funding. By selecting all of those options, you're setting the criteria for a new search of companies in Oracle DataFox.

It's important to make sure that you make the selection for companies not currently synced to Salesforce. This ensures that you only see new companies in your search.

Let's scroll up and click the **Create a New Search from this Selection** button.

You see more companies like the ones you have sold into, along with a clear set of talking points about why you're reaching out to them. In this case, they fit the range and archetype of similar successful customers.

**How You Integrate with Oracle DataFox**

There are a few quick ways to integrate from the Oracle DataFox web app.

- You can import a list of customers, if you have the list in a spreadsheet. For details, see *Import Company Lists*.
- You can create a list in Oracle DataFox and quickly type in a few of the top customers you can think of.
- You can run a Company Search report from within Oracle DataFox to find companies that meet your ideal criteria. For details, see *How You Prospect by Territory or Sourcing Criteria using Filters*.
Here are some of the things you can do if you don’t have a list of best customers:

- Filter a list of your ideal type of customer using **DataFox Company Search**.
- Pick a Conference or Award List you like, filter it as desired, and then look at insights on those companies. You can use our Conference Intelligence or Public Lists to find thousands of these kinds of lists.

Then, click the Insights tab and view real-time insights into your ideal prospect.

**Use Live Insights for Salesforce Accounts**

See live company insights from within Salesforce, including news signals, which provide the recent milestones a company has achieved.

You can see enriched information from Oracle DataFox for your leads, contacts, and accounts.

If you can’t access these Insights, ask your admin to set up your Salesforce Integration with the iFrame on each of these three pages.

See **Integrate with Salesforce**.

You see this information on any account, lead, or contact page in Salesforce.

Here’s how it looks in Salesforce (Lightning Experience).
This helps you dive deep into any company from within Salesforce, for example, Twilio. You can even get News Signals on key milestones your target accounts have reached. See *Overview of Company Signals*.

This screenshot shows Contact Info, found within any company profile.

Here are a few fields contained in the Oracle DataFox insights iFrame for Salesforce:

- Location. See *Use Mileage Radius to Include or Exclude Locations*.
- Exit Stage
- Estimated Revenue
- Headcount
- Keywords
- Funding information
- Name of CEO
- DataFox Score.
- Year Founded
- Conference Attendees. See *Find Conferences Your Prospects Attend*.

**Build Reports with Custom Oracle DataFox Information**

You can pull custom company information from Oracle DataFox into your Salesforce instance and include that information in your Salesforce reports.
Here are some benefits of building Salesforce reports by leveraging Oracle DataFox information.

- Create robust opportunity and account reports in Salesforce using the constantly refreshed data that updates automatically.
- Sales reps who are working on territory or account assignments can better prioritize accounts that fit company's ideal customer profile.
- Build a report for Salesforce accounts without a record type. You can create a lookup field in Salesforce to automatically assign a record type for all the accounts in the report.

Let's look at a scenario where you can use Salesforce reports. You want to create a report for accounts without a record type that fit your ICP and haven't been modified in the last 30 days.

1. Sign in to your Salesforce instance.
2. Select the Reports tab and click New Report.
3. Select Accounts and click Create.
4. Add filters to show the accounts that aren't current customers, haven't been modified by a sales rep in the last 30 days, and fit your ICP.
   a. From the Show list, select All Accounts and from the Territories list, select All.
   b. From the Date Field, select Created Date. From the Range field, select All Time.
   c. From the Fields section, search for the custom field, Customer Status and drag it to the Filters section.
   d. For the Customer Status filter, select the option not equal to. From the pick list, select Active Customer.
   e. From the Fields section, search for the Last Activity field and drag it to the Filters section under Customer Status. Select Less Than and enter 30 days ago.
   f. Click Ok.
   g. Drag the fields from Oracle DataFox and include them in the report. For example, you want to know which of these accounts are SaaS companies that use Salesforce, with at least $2 million in funding. When you're finished, the screen might look something like this.

5. Follow these steps to know which of these accounts don’t have a record type.
   a. Create a lookup referencing one of these fields: DF Company ID, DF Sourced From DataFox, or DF Last Synced Date.
   b. Apply one of these filters for the lookup field.
      - DF Company ID > not equal to > blank
      - DF Sourced From DataFox > equals > True
      - For the DF Last Synced Date field, select a date to see accounts based on the date they were last synced.
c. In your Salesforce report, from the Fields section, search for the field for which you have created the lookup.

d. Double-click to add the field to the report.

6. Click Run Report.

Summarize information by Account Owner and have a custom list of accounts to assign to your reps to start targeting.

This is only one example of the type of information you can gather in your Salesforce instance from Oracle DataFox. For a complete list of fields that you can gather, see Oracle DataFox Fields for Salesforce Integration.

Administer Salesforce Powered by Oracle DataFox

This chapter contains setting up and configuring Oracle DataFox within Salesforce.

Oracle DataFox and Salesforce Sync Settings

Oracle DataFox has a robust Salesforce integration. The goal is to provide a better control of your daily sync settings and quickly alert you of potential sync errors you might encounter, so you can quickly resolve any issues.

To view the sync settings, sign in to your Oracle DataFox instance and navigate to Settings > Salesforce > Bulk Syncs tab.

Your daily Sync is split into three categories (Accounts, Contacts, and Leads) which allow you to better control the daily resync rate and control your API calls. Oracle recommends that you bulk sync a maximum number of 20,000 each of accounts, contacts, and leads per day.

Also, there’s an option for the team’s account owner to opt into a daily email notifying of any Salesforce sync errors that may have occurred in the daily refresh. This is a great way to monitor the integration and confirm any process or workflow you’ve built out in Salesforce isn’t causing an error when Oracle DataFox tries to refresh your CRM.
You can see the history of your bulk syncs with details of each sync in the Bulk Sync History table. The time displayed in the Bulk Sync History table is your local time.

**Note:** The number of synced accounts in the Bulk Sync History table can be more than the bulk sync frequency that you set. This is because the numbers in the Bulk Sync History table include manual syncs and sync triggers along with the bulk sync number. For details on instant sync triggers, see Instant Triggers in *Oracle DataFox Sync*.

This screenshot shows the Bulk Sync History table.

![Bulk Sync History Table](image)

This table describes each column in the Bulk Sync History table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sync Type</td>
<td>Type of sync: Account, Contact, Lead, or Opportunity</td>
</tr>
<tr>
<td>Synced</td>
<td>Number of accounts, contacts, leads, and opportunities that are synced</td>
</tr>
<tr>
<td>Scheduled</td>
<td>Date and time when the sync was scheduled</td>
</tr>
<tr>
<td>Completed / Detail</td>
<td>Date and time when the sync completed</td>
</tr>
<tr>
<td>Status</td>
<td>The status of the bulk sync. The sync status options are: Pending, In Progress, Completed, Errored, and Cancelled. In case of an error, you can hover or click the error in the Status column to get more details. You can use the status details to closely monitor large sync projects to immediately identify any potential errors.</td>
</tr>
</tbody>
</table>

**Resolve Salesforce Field Permission Errors**

For initially syncing DataFox to Salesforce, you may run into an error where DataFox cannot sync to an Account(s) due to a field permission error like the one below:

**SFDCError:** Field Permissions Error: FLS Exception Account -> NumberOfEmployees (dfox)

This error indicates the sync user doesn’t have read and write permissions for that field in Salesforce. Sync users need read and write permissions for these fields because Oracle DataFox is enriching these fields.

To resolve these errors, you need to adjust the Field Accessibility settings for all fields where Oracle DataFox is enriching the field per your *field mappings*. You can follow the mentioned steps to adjust field permissions in Salesforce.

First, go to Salesforce Setup and click **Field Accessibility**. On the Field Accessibility page, select the Object where you want to adjust the field permissions. In this case, select the Account Object to adjust the permissions on the **NumberOfEmployees** field.
On the Field Accessibility Account page, select View by Fields and then select the field you want to view. In this case, select the Employees field.

As you can see in the above example, Field Access is Hidden for all user profiles. For any user profile that's associated with a DataFox sync user, adjust the Field Access settings so the user profile can read and write to the field. To do so, click each profile and adjust the Field-Level Security settings such that the box is checked for Visible and unchecked for Read Only as displayed in the image.
Once the adjustments are made, click **Save**.

Repeat these steps for any other fields where sync users don’t have field access and for any Salesforce user profile associated with a sync user.

## Many-to-One Salesforce Mapping

You can now enrich multiple Salesforce Accounts with the same Oracle DataFox company profile. Many-to-One Salesforce Mapping allows you to sync multiple Salesforce Accounts to one Oracle DataFox company. For example, if you have multiple Salesforce profiles related to business lines or segment geographic territories (e.g. Google APAC, Google EMEA, etc.), you can identify a primary account and enrich all secondary accounts with firmographic information.

### Company Profile: Sync a Primary Account

From an unsynced company, you can click the **SYNC** button to sync that company to a Salesforce account.

A correctly synced company should appear as follows.
The initial sync makes the Salesforce Account the primary account for many-to-one syncs. This means Oracle DataFox shows Salesforce Account info like Opportunities and Account fields from the Primary Account.

You're then able to disconnect this account using the More options icon.

If you encounter an error while syncing, an error with a link to Details for more information is displayed.

You can click Cancel to return to the original synced state.

**Company Profile: Sync a Secondary Account**

After syncing a Primary Account, you have the option of syncing secondary accounts where Oracle DataFox enriches fields on the secondary Account.

To sync a secondary account, you can select the option to Connect Another Account. You can paste in the Salesforce Account url for the secondary account to sync.

A correctly synced company should appear as shown in this screenshot.
Once synced to a secondary account, you have the option to sync additional secondary accounts using the **Connect Another Account** option.

**Company Profile: Promote a Secondary Account to Primary**

1. Once you’re connected to one or more secondary accounts, you can promote a secondary account to the primary account using the dropdown menu next to the secondary account.
2. If the new account has a different number of attached Opportunities or Contact/Leads, this number is updated on the company profile, along with any account fields from the primary account.

Company Profile: Disconnect a Secondary Account

From a company profile with multiple Accounts connected, select Disconnect from the drop-down list next to the account name.

If you disconnect a secondary account, profile returns to original synced state.

Company Profile: Disconnect a Primary Account

1. From a company profile with multiple Accounts connected, click Disconnect from the list next to the account name.

2. If you disconnect a primary account, the secondary account is automatically promoted and a notification is displayed.
Salesforce Account Trigger: Deleting Primary and Secondary Accounts

If you delete a primary account in Salesforce, the oldest secondary account is promoted to primary automatically.

If you delete a secondary account, the sync is removed with no impact on the sync to the primary account.

Sync Leads and Contacts to Salesforce

The Oracle DataFox Salesforce integration enables bidirectional syncing between the platforms. It ensures accounts are enriched with Oracle DataFox company data. It also ensures that opportunity, lead, and contact information is regularly synced to Oracle DataFox, where it can be used to provide your team with prompt and actionable information.

This article shows you how to configure your settings to ensure the right information is passed from Salesforce to Oracle DataFox and vice versa.

1. First, login to your Oracle DataFox instance and navigate to Settings.
2. Afterward, navigate to the Salesforce tab. Here, you see a variety of information regarding your Salesforce sync. Select the **Sync to Salesforce** option if not done already.
3. Open the Admin Settings panel and adjust settings as desired, from resync frequency to the amount of companies synced.

   Select the **Sync Your Leads and Contacts** check box, and click **Save Changes**.

   You can also choose to sync your Opportunities and Opportunity Amounts here. This is helpful for reporting, and can also be used in Account Scoring criteria.

   When you’re syncing to an Account for the first time, company data is enriched in Salesforce immediately. However, your Lead and Contact number is updated according to your resync settings. When you promote a Secondary Account to Primary, these numbers are updated within a few hours.
Map Account Scoring to Salesforce

Account scoring is a powerful feature to prospect important tiers. You can map your custom account score to Salesforce. To do that, you need to create custom fields in Salesforce first.

Create Custom Fields for Account Score and Account Scoring Tier

You can create various types of custom fields. The account score fields for lead, account, and contact objects are number fields. The account scoring tier fields are text fields. Let's look at how to create these custom fields for accounts, as an example.

1. Sign in to your Salesforce instance.
2. Create a new custom field.
   a. In Classic, proceed as follows:
      i. Click **Setup**.
      ii. Navigate to **Build > Customize > Accounts Fields**. You can also search for the object as shown in this screenshot.
iii. On the Account Fields page, scroll to Account Custom Fields & Relationships and click **New**.

b. In Lightning, proceed as follows:

   i. On the home page, click the **Setup** icon, and then click **Setup**.
   
   ii. Navigate to **Platform Tools > Objects and Fields > Object Manager**. You can also search for the object as shown in this screenshot.
iii. On the Setup Object Manager page, click **Account**.

iv. On the Object Manager page for the account, from the navigation panel, click **Fields & Relationships**.

v. On the Fields & Relationships page, click **New**.

3. On the New Custom Field page, from **Data Type**, select **Number** and click **Next**.

   | **Note:** If you’re creating a custom field for account scoring tier, select **Text** as the data type.

4. Enter the required details for the custom field.

   | **Note:** In the **Length** field, enter any value up to 18 for account score and 10 for account scoring tier.

This screenshot shows the New Custom Field page with details for the account score field. For details on custom field mappings, see Account Field Mappings in *Oracle DataFox Fields for Salesforce Integration*. 
Field Label: Account Score 1

Please enter the length of the field.

Length: 18

Number of digits to the left of the decimal:

Field Name: Account_Score_1

Description: Score for SF/DF

Help Text:
Set Up and Administer Salesforce Integration

5. Click Next.
6. Edit the field-level security permissions for the field created. You can also retain the default options and click Next.
7. Select the page layout options as necessary. You can also retain the default options and click Save.

The custom account score and account scoring tier fields specific to your account object are created.

Now, create custom fields for the lead and contact objects.

Map Custom Account Score and Account Scoring Tier Fields to DataFox Fields

After you create custom fields for account score and account scoring tier, you need to map them to the DataFox fields.

1. Sign in to your Salesforce instance.
2. If you’re using Classic, click the Add icon as shown in this screenshot, and select DataFox Settings.
   ![DataFox Settings in Classic](image)
   If you’re using Lightning, select DataFox Settings from the navigation menu. If you can’t see it, you can add it to your navigation menu using the Edit icon.

   ![DataFox Settings in Lightning](image)

3. Map the DataFox fields to the custom fields that you created.
   - From the Account Score list, select the custom number field that you created for account score.
   - From the Account Scoring Tier list, select the custom text field that you created for account scoring tier.
4. Verify that the Overwrite check box is selected.
5. Click Save Mapping.

The account score and account scoring tier are mapped to the custom fields in Salesforce. You’re all set to use account score in Salesforce.

Confirm Industry Field Mappings

Oracle DataFox has mutually exclusive, proprietary industry classifications that can be mapped to Salesforce to efficiently balance territories by industry. To see these data points in Salesforce, generate custom fields and map them within the Oracle DataFox settings.

1. Ensure the latest Salesforce package is installed. Then, go to the Oracle DataFox Settings within Salesforce to confirm the industry fields are available.
2. Once you’ve confirmed the industry mappings are available, generate custom fields to map these values to by returning to your Salesforce instance and select Setup.
3. Once there, navigate to **Build > Accounts > Fields**. Select **Fields**.
4. Scroll to the Account Custom Fields & Relationships, and select **New**.
5. Under Data Types, find and select **Text Area**.
6. Fill out the details of our custom field.

   For field label, enter **DF_Industry** and **Field Name DF_Industry_c**.
7. Select **Next**, choose the security preferences, then select **Save**.

   | Note: | Repeat the process for the DF Sub Industry.

### Map Custom Industry Fields

With your custom fields now added, you need to map them. To do so, return to Oracle DataFox Settings.

Under Oracle DataFox Settings, locate Industry and Sub-Industry. Set these to the correct fields with the drop down (Industry > DF_Industry_c and Sub Industry > DF_Sub_Industry_c) and spot check an account to make sure this information is being passed through to your custom fields.

### Run a Salesforce Report to Find Oracle DataFox Accounts

Oracle DataFox helps you find and prioritize your best fit accounts. The Salesforce integration allows you to push these prospects from the Oracle DataFox database into the CRM to track progress and conversations.

In Salesforce, you can run a report to see companies sourced from Oracle DataFox to determine your ROI which allows the leadership team to ensure reps are targeting and tracking the right accounts in Oracle DataFox.

Let's see how to take advantage of this utility in our quick tutorial.

1. Sign in to your Salesforce instance.
2. Find and select the Reports tab.
3. Select **New Report**.
4. On the default page, click **Create**.
5. Make the necessary adjustments for accuracy.

   Ensure that you set the Show field to **All Accounts** and set your desired date range. In this example, let's set the date range to **Custom** and **7/1/2018**.
6. Add an appropriate field into your report. To expedite this process, you can type **source** in the search function:
7. Drag **DF Sourced From DataFox** into the Filters section. Adjust the value to **True**.

8. After the value is set to **True**, you can run the report.
After you complete the report, this pulls in all companies pushed from Oracle DataFox to Salesforce.

**Set Up Salesforce Sync for Opportunities**

You can see, search, and filter for opportunity info on your synced accounts in Oracle DataFox. Viewing and searching for opportunity info helps your team better understand high-priority accounts with past opportunities or segment accounts based on those with the highest likelihood to flip.

To add syncing for your opportunity info, your group’s admin needs to enable these settings in Oracle DataFox.

In Oracle DataFox, your group’s admin can go to **Settings > Salesforce > See Admin Settings**.

There are two check boxes for syncing opportunities. Select **Sync Your Opportunities** to display opportunity info such as Opportunity Name, Opportunity Status, and Opportunity Date. You can also bring over the associated amount by checking **Sync Amounts**.

After these boxes are selected, the opportunity info is synced over during your nightly data refresh.

**Set Up List Name Sync in Salesforce**

Oracle DataFox Integration for Salesforce is a powerful tool useful for marketing and sales teams to identify best-fit accounts in Salesforce.

One challenge is, you may want to build searches or identify lists in Oracle DataFox and then run a report in Salesforce for these companies. This can be helpful for pushing values to Salesforce.

Marketing teams can use these list names to run campaigns on groups of companies. Their Sales leadership can present interesting data points so that the team is aware of key information during the prospecting and sales cycle.
Sign in to Salesforce and navigate to DataFox Settings.

The updated Salesforce package should push the list name over by default in the settings, but you may want to confirm the list name is being mapped correctly as shown in this screenshot.

All companies in your Oracle DataFox List are tagged in Salesforce with your list name.
This is a great way to notify your sales teams of specific company lists or campaigns you want them using during the sales cycle or other highlight other data points that would be valuable during the sales cycle. Please see image below of how the list name would appear in Salesforce.

For information on how to sync list names to Salesforce, see *Sync a List Name into Salesforce.*

**Grant Login Access to Support Organizations in Salesforce**

You can provide login access to your Salesforce sandbox module. This topic shows you how.

**Add Permissions**

1. Sign in to Salesforce to modify the access permissions.
2. Navigate to your name, and from the list, select **My Settings**.
3. Click **Grant Account Login Access** under **Personal**.
4. Adjust permissions as you desire. These can be set for specific timetables, such as a day, or a duration up to a month.
5. Click **Save**.

You have now modified permissions for external apps or organizations.

**Add External App Provider**

If you don't see an external app or organization, modify your **Security Controls** under Setup.
You can reach this by selecting **Setup > Security Controls > Login Access Policies**. Here, modify as required, and click **Save**.

This allows you to customize access permissions as needed.

**Map NAICS Codes to Salesforce**

Oracle DataFox uses NAICS (North American Industry Classification System) codes to help you fine-tune your prospect searching. You may also integrate NAICS codes into Salesforce to improve your search approach. To map NAICS codes and code descriptions to Salesforce, you need to create custom fields first.

**Create Custom Fields for NAICS Codes and Code Description**

1. Sign in to your Salesforce instance.
2. Create a new custom field.
   a. In Classic, proceed as follows:
      i. Click **Setup**.
      ii. Navigate to **Build > Customize > Accounts Fields**. You can also search for the object as shown in this screenshot.
iii. On the Account Fields page, scroll to Account Custom Fields & Relationships and click **New**.

b. In Lightning, proceed as follows:

1. On the home page, click the **Setup** icon, and then click **Setup**.
2. Navigate to **Platform Tools > Objects and Fields > Object Manager**. You can also search for the object as shown in this screenshot.
iii. On the Setup Object Manager page, select **Account**.

iv. On the Object Manager page for the account, from the navigation panel, click **Fields & Relationships**.

v. On the Fields & Relationships page, click **New**.

3. On the New Custom Field page, from **Data Type**, select **Text** and click **Next**.

   **Note:** If you’re creating a custom field for NAICS code description, select **Text Area** as the data type.

4. Enter the required details for the custom field.

   **Note:** In the **Length** field, enter any value up to 10.

This screenshot shows the New Custom Field page with details for the NAICS code field. For details on custom field mappings, see Account Field Mappings in *Oracle DataFox Fields for Salesforce Integration*. 
5. Click Next.
6. Edit the field-level security permissions for the field created. You can also retain the default options and click Next.
7. Select the page layout options as necessary. You can also retain the default options and click Save.

Map Custom NAICS Code and Code Description Fields to DataFox Fields

After you create custom fields for NAICS code and NAICS code description, you need to map them to the DataFox fields.

1. Sign in to your Salesforce instance.
2. If you’re using Classic, click the Add icon as shown in this screenshot and select DataFox Settings.
If you’re using Lightning, select DataFox Settings from the navigation menu. If you cannot see it, you can add it to your navigation menu using the Edit icon.

3. Map the DataFox fields to the custom fields that you created.
   - From the NAICS Code list, select the custom text field that you created for NAICS code.
   - From the NAICS Code Description list, select the custom text area field that you created for NAICS code description.
4. Verify that the Overwrite check box is selected.
5. Click Save Mapping.

The NAICS code and the NAICS code description are now mapped to the custom fields in Salesforce.

Create Custom Fields for Opportunities in Salesforce

You can prioritize your accounts using opportunity info in both Salesforce and Oracle DataFox.

Adding Salesforce opportunity info to related accounts is helpful for running reports on your accounts for historical opportunities. For instance, you can see which accounts had lost opportunities in the past or see the total number of opportunities for a given account.

For Oracle DataFox, adding opportunity info to accounts allows you to bring this reporting into Oracle DataFox. You can screen accounts based on historical opportunities, or add past opportunities as key criteria for account scoring.

To set up this reporting, create custom fields on the Account object.

Here are instructions on how to add fields to the Account record for the number of closed won opportunities, closed lost opportunities, and open opportunities.

After these fields are added to Account records, you can bring these fields into Oracle DataFox for screening companies and set criteria for Account Scoring.

Creating Number of Open Opportunities in Salesforce

For the greatest value, we need to create custom Account records in Salesforce for Open Opportunities, Closed Won Opportunities, and Closed Lost Opportunities. Let’s begin with Open Opportunities.

1. Sign in to your Salesforce account.
2. Select Setup.
3. Under **Customize**, navigate to **Accounts** and select **Fields**. Conversely, you can type in Accounts in the search bar to quickly bring up the tab.

4. From the Fields tab, scroll down to Account Custom Fields and Relationships. Click **New**.

5. Select **Roll-Up Summary** and click **Next**.

6. Enter details about the Custom Field.

   In this example, let’s name it **Number of Open Opportunities**, but you’re free to enter any info you prefer.

7. You can add details about the field as well. Once complete, select **Next**.

8. On the Define the Summary Calculation page, enter specific data that determines calculations and what kind of data is shown.

9. Select **Opportunities** from the **Summarized Object** list.

10. Select **Count** from the **Select Roll-Up Type** list.

11. Select **Only records meeting certain criteria should be included in the calculation** to specify the Opportunity field.

12. Add prerequisites to get the required results.

   - Change Field to Closed.
   - Change Operator to Equals.
   - Set Value to False (Do so, click the magnifying glass icon, and select **False**).

13. Select **Next**.

14. You may edit the field security permissions as preferred, and select **Next**.

15. You may adjust account layouts, and click **Save**.

   You have now created a custom field for Number of Open Opportunities.
You still need to create two additional fields for maximum value.

Create Number of Closed Won Opportunities in Salesforce

1. Navigate to Setup. Click Fields under Accounts.
3. Select Roll-Up Summary and click Next.
4. On the details page, enter different information.

Enter a name for Field Label. In this example, let's title the field as Number of Closed Won Opportunities.

5. Click Next.
6. Set Summarized Object to Opportunities and Roll-Up Type to Count.
7. Select filter criteria as only records meeting certain criteria should be included in the calculation.
8. Under Filter Criteria, we need to adjust options.
   o Field to Closed
   o Operator set to Equals
   o Value set to True
9. Set an additional line of Criteria for this custom field.
Set them as shown:

- Field to Won
- Operator set to Equals
- Value set to True

10. Click Next.

Like our steps before, the next page brings you to field security options. For now, leave these to their default options.

On the page layout window, retain the default settings. Click Save. You have now added the second part to our Salesforce custom fields.

However, to complete our set, we need to create one more custom field.

Creating Number of Closed Lost Opportunities in Salesforce

1. Create a field under Account Custom Fields and Relationships and select Roll-Up Summary.
2. On the details page, let’s refer to the field as Number of Closed Lost Opportunities.
3. After you add those details, select Next.

As with the other options, input selections as shown.

4. Set the last criteria table before moving on.
5. You will need two lines of criteria.
   - Set Field to Closed/Won
   - Set Operator to Equals
   - Set Value to True/False

6. Select Next.
   
   For Security fields and page layout, let’s leave these options by default. You’re free to adjust as required.

7. Click Save. Now, you have created all relevant Opportunity Fields. To use them, you need to add them to your Oracle DataFox settings.

Add Opportunity Info to Your Account Score
You can add opportunity info to your account score. You can further use the info to adjust the account score. For more information, see Setting Up Additional Account Fields Overview.

Grant Login Access to Salesforce

Oracle DataFox and Salesforce offer powerful features for users when managed properly. However, to access said features, you need to grant appropriate permissions.

Let’s quickly see how to grant Salesforce login access.

Grant Sign In Access

1. Sign in to your Salesforce application.
2. Click your user name, and then click My Settings.
3. On the Personal menu, select Grant Account Login Access. Conversely, you may search for Grant Account Login Access in the search bar.
4. In the Grant Account Login Access dialog box, edit access permissions for different services like Vidyard or LinkedIn.

   **Note:** Each permission can have a specific timetable, such as a day or a week.

   For example, let’s modify DataFox Intelligence Inc. Support.
5. When you have modified permissions as desired, click **Save**. Access has been granted based on your selections and timetables.

Salesforce Instant Triggers

This topic covers an overview of instant triggers and marketing automation tools.

**Overview**

Enable or disable Oracle DataFox Instant Sync & Ongoing Enrichment for Salesforce Accounts, Contacts, and/or Leads. For each record type that you enable, Oracle DataFox performs the following activities:

1. Automatically sync newly created Salesforce records into the Oracle DataFox prospecting platform
2. Immediately enrich synced records with Oracle DataFox's firmographic data (according to your specified field mappings)
3. Continuously enrich synced records with Oracle DataFox's firmographic data whenever they’re updated.
You're able to control the trigger sync On Creation when a new record is established or On Update when an existing record is revised.

Additionally, you can set the Max Updates Frequency on a per record basis to limit syncs during certain time frames. For example, if you set the frequency to update every hour, Oracle DataFox updates the record hourly regardless of the number of revisions within the hour. Of course, if a new record comes in or another record is revised, it’s updated immediately. This provides more control and reduces the API calls used.

**Marketing Automation Tools**

Develop more successful marketing campaigns with freshly enriched leads from Oracle DataFox.

If you're using Salesforce in combination with Hubspot, Eloqua, Pardota or another marketing automation tool, Oracle DataFox updates the lead record when it hits your Salesforce instance. You can push the enriched lead over to your marketing automation tool and assign it to a specific marketing campaign.
Salesforce Field Mappings

Mapping Oracle DataFox fields enables you to control the information that’s enriched in your Salesforce account. You can also receive updated and accurate firmographic information from Oracle DataFox.

Set Oracle DataFox Field Mapping

If you’re using the Salesforce Classic UI, click the All Tabs (+) icon and select DataFox Settings. If you’re using the Salesforce Lightning Experience UI, click the App Launcher icon and select DataFox Settings.

How Field Mappings Work

You can map fields for the Account, Lead, and Contact objects in Salesforce. These mappings determine how Oracle DataFox information enriches fields in Salesforce. For instance, you can map the Oracle DataFox city info to the Salesforce billing city. Each mapping includes a dropdown to select which Salesforce fields to map to.

The configuration is already pre-populated with default mappings, so Oracle DataFox won’t overwrite any existing information in your Salesforce. Notice that some Salesforce fields have the dfox__ prefix. These are fields that are included in the DataFox Sync package since most customers typically don’t have these existing fields in Salesforce.

How Overwriting Works

Use the Overwrite check box on the Field Mappings page to determine whether to overwrite the Salesforce field with Oracle DataFox data. If you don’t select the Overwrite check box for a field, then the incoming Oracle DataFox field only populates the corresponding Salesforce field if the Salesforce field is empty. In other words, Oracle DataFox fields populates the corresponding field only if it’s in a null state.

Let’s see how overwriting works for the location fields in Salesforce. This screenshot shows the location fields highlighted on the Settings page.
The minimum set of location fields to be mapped are: Street, City, State, Country, and Postal Code.

After you update the location within Oracle DataFox, the Salesforce instance is updated as per the frequency mentioned in the **Max Update Frequency** setting. You can view the setting in your Salesforce instance on the DataFox Settings page.

Here’s what you must keep in mind when overwriting the location or address fields in Salesforce.

- The only way you can overwrite the existing data in the Salesforce address fields with the incoming Oracle DataFox data is if you select the **Overwrite** check box for all the mapped location fields.
- If the **Overwrite** check box is enabled, the existing data in Salesforce fields is overwritten if all the mapped address fields are empty.
- You can overwrite the existing data in Salesforce address fields with the incoming Oracle DataFox data only if the incoming data partially matches the existing data. This logic ensures that inconsistent data doesn't overwrite the existing data in Salesforce fields.
- You can overwrite the empty address fields that are mapped in Salesforce if the incoming data for the other fields matches the existing data.

This example explains the various scenarios when overwriting the address fields in Salesforce.
### Scenario | Oracle DataFox Values | Salesforce Values | Values After Sync if Overwrite is Enabled
--- | --- | --- | ---
All the Salesforce location fields are mapped to Oracle DataFox fields | 150 Mathilda Place London No data United Kingdom W1A 1AA | No data Sunnyvale CA Empty United States 98765 | 150 Mathilda Place London No data United Kingdom W1A 1AA
All the Salesforce location fields are mapped to Oracle DataFox fields and all the values are empty in Salesforce except country with the value, **US** | 150 Mathilda Place CA US 11111 | No data No data US No data | 150 Mathilda Place CA US 11111
Salesforce location fields are mapped to Oracle DataFox fields and existing data in Salesforce is consistent with the incoming data | 150 Mathilda Place CA 11111 | No data CA 11111 | 150 Mathilda Place CA 11111
All the Salesforce location fields are mapped to Oracle DataFox fields and the existing data in Salesforce is inconsistent with the incoming data | 150 Mathilda Place NJ 11111 Los Angeles United States | No data CA 11111 Sunnyvale United States | 150 Mathilda Place NJ 11111 Los Angeles United States

Click **Save Mapping** to save your selections.

## Confirm Lead Integration within Salesforce

If you're using Oracle DataFox to enrich your leads, you can confirm that the bilateral sync is working by running a report in Salesforce.

1. To create the report, first, go to the **Reports** tab in Salesforce and select a **New Report**.
2. Click **Leads** from the Leads folder, and then click **Create**.

3. Show All Leads for the range of All Time. Then search for DF Company ID and pull this field into your report. You should toggle the drop down to read DF Company ID does not contain, blank, or "".

4. Click **OK**.

**DF ID** is matching the lead to a company profile and confirming that the lead enrichment occurred.

### Use and Bypass Required Fields

If you’re getting a required field error when pushing new accounts from Oracle DataFox to Salesforce, it’s likely you have a field requirement on a field that Oracle DataFox cannot enrich.

When Oracle DataFox pushes new accounts to Salesforce, a field is updated only if Oracle DataFox info is mapped to that field.

To workaround the field requirement, you can change the field requirement to a validation rule which allows DataFox to create new accounts without updating the field value.

#### Change Required Field to Validation Rule

1. For each required field in Salesforce, deselect the required field option.

   You can then add a validation rule that requires users to enter a field value on a new account unless the account is being pushed from Oracle DataFox to Salesforce.

2. Once the validation rule page opens, add a Rule Name and then add an Error Condition Formula. The formula depends on whether the field is a text field or picklist field. The formulas below use Customer_Status__c as the example field for the validation rule.

   Here’s the formula for text field.

   \[ \text{AND(isblank( dfox__Id__c ),ISNEW()== TRUE, ISNULL(Customer_Status__c))} \]

   Formula for picklist field:

   \[ \text{AND(isblank( dfox__Id__c ),ISNEW()== TRUE, ISPICKVAL(Customer_Status__c,""))} \]

3. Enter in an Error Message you would like to show when anyone is saving a new account outside of DataFox ID, that should require the field update.

4. Your result should look like this image.
Now you know how to bypass the required fields.

Salesforce Lead Integration

One problem that plagues both marketing and sales teams is the lack of firmographic information on leads.

Oracle DataFox now gives you the ability to map your Salesforce leads in the same way you would with your Salesforce Accounts. As you may know, Oracle DataFox enriches the Account record with information including location, headcount, revenue, and so on.

We've taken a step further by bringing this information to the lead level. For example, let's say somebody downloads a knowledge document from your website. We receive a notification in Salesforce that we have a new lead, and have a name and email address. There's no way for us to automatically tell if this person belongs to a company that's an existing prospect, or to get information about the company itself.

We enrich your leads the same way that we do your accounts and contacts. You can get the same information so that your leads in Salesforce are enriched with Oracle DataFox information. To take this a step further, since Oracle DataFox communicates with your entire Salesforce instance, we can notify you if your lead belongs to an existing Salesforce Account.

This can also enrich leads info in your marketing automation tools like Hubspot, Eloqua, or Pardon, assuming they're integrated with Salesforce. When a lead is enriched in Salesforce, that lead can sync to your marketing automation tool to route leads to campaigns or the right reps on your team.

Finally, the Lead integration also allows Oracle DataFox users to see where they have existing leads for companies in Oracle DataFox. This is great for helping reps prioritize leads, set up alerts based on leads they own or run searches for net new prospects by filtering out any existing leads. Let's see how this works.
Field Mappings

Log in to Salesforce and navigate to your Oracle DataFox Settings. You notice a dedicated lead section as you scroll down.

You can determine your fields mappings in the Lead section. You have most likely already set this up at the account and contact level, but here you determine where the information from Oracle DataFox goes into Salesforce.

The column titled **Overwrite** indicates where you would like Oracle DataFox to overwrite information that may be already updated in your Salesforce. For example, if we have updated revenue information for a company and that option is selected, your Salesforce instance is updated with information from Oracle DataFox.

One field you want to pay attention to is Company Salesforce ID.

[Image of field mappings]

Keeping this option at the default setting allows you to know when a lead has an existing Salesforce account, where you may want to convert that lead into the appropriate Account.

Instant Trigger

Enable or disable Oracle DataFox Instant Sync and Ongoing Enrichment for Salesforce Accounts, Contacts, and/or Leads. For each record type that you enable, Oracle DataFox performs the following activities.

1. Automatically sync newly created Salesforce records into the Oracle DataFox prospecting platform.
2. Immediately enrich synced records with Oracle DataFox’s firmographic data (according to your specified field mappings).
3. Continuously enrich synced records with Oracle DataFox’s firmographic data whenever they’re updated.
You can control the trigger sync On Creation when a new lead is established or On Update when an existing lead is revised. Additionally, you can set the **Max Updates Frequency** on a per record basis to limit syncs during certain time frames.

For example, if you set the frequency to update every hour, Oracle DataFox updates your lead record hourly regardless of the number of revisions on that record occurring within the hour.

**Note:** You must turn on **Sync Contacts and Leads** under Salesforce Admin for this information to refresh.
Of course, if a new lead comes in or another record is revised, the information is updated immediately. This provides more control and help to save API calls if the leads are frequently updated!

Adjust your Salesforce Sync Settings

**Note:** The sync settings can only be controlled by the Oracle DataFox team admin. If you need to change the team admin, please email Oracle Support.

You can customize your Salesforce sync settings using the Settings page in Oracle DataFox. You can set how often you want it to sync (e.g. daily, weekly) and how many companies to sync each time (e.g. 1,000 companies).

The sync settings look at which companies were most recently synced to make sure all companies get synced on a regular basis.

In other words, if you have 20,000 Salesforce accounts, you can adjust the settings to sync 5,000 companies each day. This ensures that all 20,000 accounts are synced every 4 days.

You can also adjust the settings to sync all 20,000 accounts each day. The only issue here is that this sync setting uses 20,000 Salesforce API calls, so you may want to look at how many Salesforce API calls your group has on a daily basis.

Auto-Populate Salesforce Fields

You can auto-populate existing fields in Salesforce when creating Leads, Contacts, and Accounts from Oracle DataFox. For instance, if your Salesforce session requires you to populate fields like Source, Sector, or Tier when creating new records, you can auto-populate these fields by creating a Workflow Rule.

The walkthrough shows you how to auto-populate fields on the Account object. But the same steps can be followed for auto-populating fields on the Contact or Lead object whenever a Contact or Lead is created from Oracle DataFox.

**Create Workflow Rule**

1. Navigate to **Setup > Workflow Rules > New Rule**.
2. You must define to which object the Workflow Rule applies. In this case, apply the Workflow Rule to the Account object.
Note: You can also create similar Workflow Rules for the Lead or Contact object.

3. Give your rule a Rule Name like Tier is Tier 1. Determine the Evaluation Criteria. If you want the rule only to apply when a new record is created, you may want to select created.

4. Determine the Rule Criteria. In this case, you may want to select formula evaluates to true in the Run this rule if the list. Then, add the following formula: \( \text{NOT(ISBLANK(dfox__Id__c))} \).

This formula defines how the Workflow Rule is triggered. In this case, it's triggered whenever (1) a new Salesforce Account is created AND (2) the dfox__ID__c is populated (meaning the account record is synced to Oracle DataFox).

5. Click Save & Next to define the Workflow action.

Specify Workflow Action

To create a Workflow Action that auto-populates a field, you may want to select New Field Updates under Immediate Workflow Actions.
After selecting New Field Update, you’re redirected to a new prompt for naming the field update and selecting which tab to update. You can add a Name for the update, and then select which Field to Update.

After selecting a field, you have the option to **Specify New Field Value**. You may want to select a specific field value. This defines which value auto-populates whenever the Workflow Rule criteria are met.

Finally, click Save to set up the Workflow Rule and associated Workflow Action.

### Activate Workflow Rule

After creating the Workflow Rule, you need to click **Activate the rule** so that it starts running for any new records created from Oracle DataFox.

Now that the Workflow Rule has been activated, you may want to test the Workflow Rule by creating a new record from Oracle DataFox to Salesforce.

### Oracle DataFox Fields for Salesforce Integration

It’s very important that the company information on your account objects in Salesforce is accurate. Inaccurate data leads to incorrect territory planning and company reporting. Mapping Oracle DataFox fields with Salesforce fields ensures accurate company data in Salesforce.

By integrating your Oracle DataFox account with Salesforce, you can enrich the Salesforce fields with DataFox data. The fields are then automatically updated based on the frequency that you have selected (monthly, weekly, daily, and so on). The Oracle DataFox API populates the Salesforce fields with DataFox data. Since it’s stored in Salesforce, you can use the Oracle DataFox data to run reports in Salesforce.

See:

- **Integrate with Salesforce**
• Build Reports with Custom Oracle DataFox Information

Let's look at the field mappings for accounts, contacts, and leads to sync data from Oracle DataFox to Salesforce.

**Note:** In both tables, the columns *Salesforce Field Type* and *Salesforce Field Max Width* are for reference only except for fields where the corresponding Salesforce fields don't exist. If you want to sync DataFox fields that don't have corresponding Salesforce fields, you use these two columns to create custom fields.

### Account Field Mappings

This table lists the account-level data fields.

<table>
<thead>
<tr>
<th>Oracle DataFox Field</th>
<th>Salesforce Field</th>
<th>Salesforce Field Type</th>
<th>Salesforce Field Max Width</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Name</td>
<td>String</td>
<td>255</td>
<td>The Oracle DataFox account name</td>
</tr>
<tr>
<td>URL</td>
<td>Website</td>
<td>URL</td>
<td>255</td>
<td>The URL of the company website</td>
</tr>
<tr>
<td>Street</td>
<td>BillingStreet</td>
<td>Text</td>
<td>255</td>
<td>The street address</td>
</tr>
<tr>
<td>City</td>
<td>BillingCity</td>
<td>String</td>
<td>40</td>
<td>The city where the company has its headquarters</td>
</tr>
<tr>
<td>State</td>
<td>Billing State</td>
<td>String</td>
<td>80</td>
<td>The state where the company has its headquarters</td>
</tr>
<tr>
<td>State Code</td>
<td>custom field</td>
<td>Text</td>
<td>10</td>
<td>The state code of the company's address</td>
</tr>
<tr>
<td>Country</td>
<td>Billing Country</td>
<td>String</td>
<td>80</td>
<td>The country where the company has its headquarters</td>
</tr>
<tr>
<td>Country Code</td>
<td>custom field</td>
<td>Text</td>
<td>10</td>
<td>The country code of the company's address</td>
</tr>
<tr>
<td>Postal Code</td>
<td>BillingPostalCode</td>
<td>String</td>
<td>20</td>
<td>The postal code of the company's address</td>
</tr>
<tr>
<td>Description</td>
<td>Description</td>
<td>Long Text Area</td>
<td>32000</td>
<td>A short description of the company</td>
</tr>
<tr>
<td>Number of Employees</td>
<td>NumberOfEmployees</td>
<td>Integer</td>
<td>8</td>
<td>An estimate of total employees</td>
</tr>
<tr>
<td>Oracle DataFox Field</td>
<td>Salesforce Field</td>
<td>Salesforce Field Type</td>
<td>Salesforce Field Max Width</td>
<td>Description</td>
</tr>
<tr>
<td>----------------------------</td>
<td>-----------------------------------</td>
<td>-----------------------</td>
<td>---------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Revenue Estimate</td>
<td>dfox__Revenue_Estimate__c</td>
<td>Currency</td>
<td>14</td>
<td>An estimate of the company’s annual revenue</td>
</tr>
<tr>
<td>Stock Ticker</td>
<td>custom field</td>
<td>Text</td>
<td>10</td>
<td>The company’s stock symbol</td>
</tr>
<tr>
<td>Year Founded</td>
<td>dfox__Year_Founded__c</td>
<td>Number</td>
<td>4</td>
<td>The year in which the company was established.</td>
</tr>
<tr>
<td>Keywords</td>
<td>dfox__Keywords__c</td>
<td>Long Text Area</td>
<td>2200</td>
<td>A comma-delimited list of the company’s top keywords describing the business</td>
</tr>
<tr>
<td>Industry</td>
<td>custom field</td>
<td>Text Area</td>
<td>255</td>
<td>The industry category that represents the company</td>
</tr>
<tr>
<td>Sub-Industry</td>
<td>custom field</td>
<td>Text Area</td>
<td>255</td>
<td>The subindustry category that represents the company</td>
</tr>
<tr>
<td>NAICS Code</td>
<td>custom field</td>
<td>Text</td>
<td>10</td>
<td>The NAICS (North American Industry Classification System) code</td>
</tr>
<tr>
<td>NAICS Code Description</td>
<td>custom field</td>
<td>Text Area</td>
<td>255</td>
<td>The NAICS (North American Industry Classification System) description</td>
</tr>
<tr>
<td>DataFox URL</td>
<td>dfox__Url__c</td>
<td>URL</td>
<td>255</td>
<td>Link to the company profile in the DataFox web application</td>
</tr>
<tr>
<td>LinkedIn URL</td>
<td>dfox__LinkedIn_URL__c</td>
<td>URL</td>
<td>255</td>
<td>The company’s LinkedIn ID</td>
</tr>
<tr>
<td>Crunchbase Url</td>
<td>dfox__Crunchbase_URL__c</td>
<td>URL</td>
<td>255</td>
<td>The company’s Crunchbase slug</td>
</tr>
<tr>
<td>Stage</td>
<td>dfox__Stage__c</td>
<td>Text or Picklist</td>
<td>255</td>
<td>The stage of financing round</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Possible values = Acquired, Public, Closed Down, Pre-Series A, Series A, Series B, Series C, Late Stage</td>
</tr>
</tbody>
</table>
Using DataFox

Chapter 5

Set Up and Administer Salesforce Integration

<table>
<thead>
<tr>
<th>Oracle DataFox Field</th>
<th>Salesforce Field</th>
<th>Salesforce Field Type</th>
<th>Salesforce Field Max Width</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Funding</td>
<td>dfox__Total_Funding__c</td>
<td>Currency</td>
<td>12</td>
<td>Currency used in the last funding round</td>
</tr>
<tr>
<td>Last Funding Round Type</td>
<td>dfox__Latest_Funding_Type__c</td>
<td>Text</td>
<td>64</td>
<td>The type of last funding round</td>
</tr>
<tr>
<td>Latest Funding Date</td>
<td>dfox__Latest_Funding_Date__c</td>
<td>Date</td>
<td>NA</td>
<td>The date of the last funding round</td>
</tr>
<tr>
<td>Last Funding Round Amount</td>
<td>dfox__Latest_Funding_Amount__c</td>
<td>Currency</td>
<td>(16,2)</td>
<td>The amount raised in the last funding</td>
</tr>
<tr>
<td>Investors</td>
<td>dfox__Investors__c</td>
<td>Long Text Area</td>
<td>5000</td>
<td>List of investors</td>
</tr>
<tr>
<td>Account Score</td>
<td>custom field</td>
<td>Number</td>
<td>18</td>
<td>The calculated score for the given Company</td>
</tr>
<tr>
<td>Account Scoring Tier</td>
<td>custom field</td>
<td>Text or Picklist</td>
<td>10</td>
<td>The tier to which the account score belongs. Possible values = Tier 1, Tier 2, Tier 3, Tier 4</td>
</tr>
<tr>
<td>Lists</td>
<td>dfox__Lists__c</td>
<td>Long Text Area</td>
<td>5000</td>
<td>The static and dynamic lists this account is associated with</td>
</tr>
</tbody>
</table>

Contact and Lead Field Mappings
This table lists data fields for contacts and leads.

<table>
<thead>
<tr>
<th>Oracle DataFox Field</th>
<th>Salesforce Field</th>
<th>Salesforce Field Type</th>
<th>Salesforce Field Max Width</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Company Salesforce ID</td>
<td>AccountId</td>
<td>reference</td>
<td>18</td>
<td>The company's Salesforce ID</td>
</tr>
<tr>
<td>Company Name</td>
<td>dfox__Company_Name__c</td>
<td>Text</td>
<td>100</td>
<td>Name of the company</td>
</tr>
<tr>
<td>Company Website</td>
<td>dfox__Company_Website__c</td>
<td>URL</td>
<td>255</td>
<td>The URL of the company website</td>
</tr>
<tr>
<td>Company Street</td>
<td>dfox__Company_Street_Address__c</td>
<td>Long Text Area</td>
<td>1048</td>
<td>Street address of the company</td>
</tr>
<tr>
<td>Oracle DataFox Field</td>
<td>Salesforce Field</td>
<td>Salesforce Field Type</td>
<td>Salesforce Field Max Width</td>
<td>Description</td>
</tr>
<tr>
<td>------------------------------------------</td>
<td>--------------------------------</td>
<td>-----------------------</td>
<td>---------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Company City</td>
<td>dfox__Company_City__c</td>
<td>Text Area</td>
<td>255</td>
<td>The city where the company has its headquarters</td>
</tr>
<tr>
<td>Company State</td>
<td>dfox__Company_State__c</td>
<td>Text Area</td>
<td>255</td>
<td>The state where the company has its headquarters</td>
</tr>
<tr>
<td>Company State Code</td>
<td>custom field</td>
<td>Text</td>
<td>10</td>
<td>The state code of the company's address</td>
</tr>
<tr>
<td>Company Country</td>
<td>dfox__Company_Country__c</td>
<td>Text Area</td>
<td>255</td>
<td>The country where the company has its headquarters</td>
</tr>
<tr>
<td>Company Country Code</td>
<td>custom field</td>
<td>Text</td>
<td>10</td>
<td>The country code of the company's address</td>
</tr>
<tr>
<td>Company Zip Code</td>
<td>dfox__Company_Zip_Code__c</td>
<td>Text Area</td>
<td>255</td>
<td>The zip code of the company's address</td>
</tr>
<tr>
<td>Company Phone Number</td>
<td>dfox__Company_Phone_Number__c</td>
<td>Phone</td>
<td>40</td>
<td>The company's phone number</td>
</tr>
<tr>
<td>Company Description</td>
<td>dfox__Company_Long_Description__c</td>
<td>Long Text Area</td>
<td>5000</td>
<td>A description of the company</td>
</tr>
<tr>
<td>Company Number of Employees</td>
<td>dfox__Company_Number_of_Employees__c</td>
<td>Number</td>
<td>18</td>
<td>An estimate of total employees</td>
</tr>
<tr>
<td>Company Revenue Estimate</td>
<td>dfox__Company_Revenue_Estimate__c</td>
<td>Currency</td>
<td>18</td>
<td>An estimate of the company's annual revenue</td>
</tr>
<tr>
<td>Company Stock Ticker</td>
<td>dfox__Company_Stock_Ticker__c</td>
<td>Text Area</td>
<td>255</td>
<td>The company's stock symbol</td>
</tr>
<tr>
<td>Company Top Keywords</td>
<td>dfox__Company_Top_Keywords__c</td>
<td>Long Text Area</td>
<td>5000</td>
<td>A comma-delimited list of the company's top keywords describing the business</td>
</tr>
<tr>
<td>Company Industry</td>
<td>custom field</td>
<td>Text Area</td>
<td>255</td>
<td>The industry category that represents the company</td>
</tr>
<tr>
<td>Company Sub-Industry</td>
<td>custom field</td>
<td>Text Area</td>
<td>255</td>
<td>The subindustry category that represents the company</td>
</tr>
<tr>
<td>Oracle DataFox Field</td>
<td>Salesforce Field</td>
<td>Salesforce Field Type</td>
<td>Salesforce Field Max Width</td>
<td>Description</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>--------------------------------------</td>
<td>-----------------------</td>
<td>-----------------------------</td>
<td>-----------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Company NAICS Code</td>
<td>custom field</td>
<td>Text</td>
<td>10</td>
<td>The NAICS (North American Industry Classification System) code</td>
</tr>
<tr>
<td>Company NAICS Code Description</td>
<td>custom field</td>
<td>Text Area</td>
<td>255</td>
<td>The NAICS (North American Industry Classification System) description</td>
</tr>
<tr>
<td>Company DataFox ID</td>
<td>dfox__Company_DataFox_Id__c</td>
<td>Text</td>
<td>24</td>
<td>Company ID in the DataFox web application</td>
</tr>
<tr>
<td>Company DataFox URL</td>
<td>dfox__Company_DataFox_URL__c</td>
<td>URL</td>
<td>255</td>
<td>Link to the company profile in the DataFox web application</td>
</tr>
<tr>
<td>Company LinkedIn URL</td>
<td>dfox__Company_Linkedin_URL__c</td>
<td>URL</td>
<td>255</td>
<td>The company's LinkedIn ID</td>
</tr>
<tr>
<td>Company Crunchbase URL</td>
<td>dfox__Company_Crunchbase_URL__c</td>
<td>URL</td>
<td>255</td>
<td>The company's Crunchbase slug</td>
</tr>
<tr>
<td>Company Stage</td>
<td>dfox__Company_Stage__c</td>
<td>Text or Picklist</td>
<td>255</td>
<td>The stage of financing round</td>
</tr>
<tr>
<td>Company Private Funding</td>
<td>dfox__Company_Private_Funding__c</td>
<td>Currency</td>
<td>18</td>
<td>Funding from private sources</td>
</tr>
<tr>
<td>Company Last Funding Round Type</td>
<td>dfox__Company_Last_Funding_Type__c</td>
<td>Text</td>
<td>255</td>
<td>The type of last funding round</td>
</tr>
<tr>
<td>Company Latest Funding Date</td>
<td>dfox__Company_Last_Funding_Date__c</td>
<td>Date</td>
<td>NA</td>
<td>The date of the last funding round</td>
</tr>
<tr>
<td>Company Last Funding Round Amount</td>
<td>dfox__Company_Last_Funding_Amount__c</td>
<td>Currency</td>
<td>18</td>
<td>The amount raised in the last funding</td>
</tr>
<tr>
<td>Company Investors</td>
<td>dfox__Company_Investors__c</td>
<td>Long Text Area</td>
<td>5000</td>
<td>List of investors</td>
</tr>
<tr>
<td>Company Account Score</td>
<td>custom field</td>
<td>Number</td>
<td>18</td>
<td>The calculated score for the given Company</td>
</tr>
<tr>
<td>Company Account Scoring Tier</td>
<td>custom field</td>
<td>Text or Picklist</td>
<td>10</td>
<td>The tier to which the account score belongs</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Possible values = Tier 1, Tier 2, Tier 3, Tier 4</td>
</tr>
</tbody>
</table>
Set Up Additional Salesforce Account Fields to Search and Filter in Oracle DataFox

This topic details how to set up additional Salesforce fields and Salesforce Accounts fields in Oracle DataFox.

Setting Up Additional Salesforce Fields

The Salesforce integration allows teams to view, filter, and search Oracle DataFox on most Salesforce Account fields like Account Owner, Tier, and Last Activity Date.

With your Salesforce account fields in Oracle DataFox, you can see Salesforce information on your target accounts, filter on fields like account status and tier, and set up a daily news digest based on your Salesforce account info.

Setup additional Salesforce Account Fields in Oracle DataFox (Admin Only)

The Salesforce integration by default includes the Salesforce Account ID and Account Owner fields in Oracle DataFox. Here’s what you can do to add more account fields.

1. On the user menu, click **Settings**, and then click **Salesforce**.
2. On the DataFox for Salesforce page, click **Synced Fields**.
3. Select the Salesforce account fields that are available for your team in Oracle DataFox.

The fields aren’t synced immediately but on a scheduled time period. Click the Bulk Syncs tab to configure the bulk syncs. Here are some important notes.

- Frequency refers to how often Oracle DataFox pushes Oracle DataFox firmographic data into Salesforce and at the same time grab Salesforce synced fields.
- Number of companies refers to total number of companies that are updated and copied during this scheduled resync.
- The sync happens at around 08:00 P.M. PST nightly.
• Updates happen in bulk (250 companies at a time) but this update uses some of the customer’s total Salesforce API calls (which is why we do this on a scheduled basis that you have control over).

• Non-Oracle DataFox admins are still able to see which account fields are configured for sync, but they’re not allowed to make changes to that list.

The available fields are defined by your team’s Salesforce Account fields, and these fields are added in Oracle DataFox for all Salesforce Accounts synced to Oracle DataFox company profiles.

**Add Salesforce Account Fields to your Oracle DataFox View (All Users)**

After a user configures the synced fields and the data is populated after the scheduled sync period, all Oracle DataFox users in that account are able to view and filter that data. Users can add the Salesforce Synced fields to the company data table by going to the **Change Column** modal and turning them on.

Then, move desired data points from **Inactive** to **Active** columns.

Filtering, saving searches, and sorting should work as normal. Fields are displayed within the Salesforce widget on each company profile page.

**Configure your Oracle DataFox Account for the Salesforce Integration**

Once the additional fields are added, provide your team with this short guide on how to leverage the Salesforce integration, including how to filter in Oracle DataFox on Salesforce fields and setting up alerts based on the Salesforce accounts you own.

**FAQ: Why are some Salesforce Account fields not displaying in Oracle DataFox settings?**

If the fields are marked as hidden in Salesforce, they’re not available for syncing in Oracle DataFox.

This is because that data isn't returned by the Salesforce API.
FAQ: Are all field types available for syncing from Salesforce to Oracle DataFox?

The following field types are available for syncing:

- multipicklist
- url
- textarea
- picklist
- percent
- double
- datetime
- currency
- boolean
- date
- string

Certain field types aren't available, including fields that reference other objects (except for Account Owner) and encrypted text areas.

Create Salesforce Formula Fields
The Oracle DataFox for Salesforce integration can pull in your Account fields to Oracle DataFox. This allows users to filter, search and set alerts based on Salesforce account fields like owner, tier, sector, and so on.

If you’re trying to pull a User field into Oracle DataFox, you may see a string of text that correlates to the User ID. To convert the string to the actual username, you need to create a field in Salesforce. This field uses a formula to display the user First and Last name.

Here’s a walkthrough on how to create a Formula field:

1. Click New to create a field on account object.
2. Select Formula and click Next.
3. Select Text and click Next.
   Fill out the Field Label appropriately. This varies based on your preferences, but for now, let’s use the written example as shown in this screenshot.

4. Click Insert Field to add the first name.
   Select the Advanced Formula tab where the Insert Field prompt appears, as shown in this screenshot.

5. Select the First Name of the Field.
6. Add the following syntax to the formula: & " " &.
7. Click Insert Field to add the Last Name.
8. Select Last Name in the Field options.
9. Insert the Last Name. Now, your screen has both name fields inserted. Click Next.
10. Click Next and save the field.
   You can adjust and check the boxes as desired. For now, let’s select them all and click Next.
11. Add the field to Oracle DataFox.

Because Salesforce data syncs to Oracle DataFox every night, you need to wait at least one night before adding your new field to Oracle DataFox. Follow the instructions below to add additional Salesforce account fields to Oracle DataFox:
Set Up Additional Salesforce Account Fields to Search and Filter in Oracle DataFox.

Add Custom Salesforce Fields

You can push custom fields from Salesforce into Oracle DataFox to perform these actions:

- Use your own data for filter criteria to identify interesting accounts.
- Incorporate customer Salesforce fields into your account scoring criteria.
- Pass third-party data through Salesforce and ultimately into Oracle DataFox to bubble up interesting companies or leverage these sources in your Account Scoring.

Let’s see how to add custom Salesforce fields.

1. On the user menu, click Settings, and then click Salesforce.
2. On the DataFox for Salesforce page, click Synced Fields.
3. Select the fields you would like to sync from Salesforce.

   **Note:** The syncing process takes about 24 hours to complete.

4. Navigate to the Companies tab.
5. Select Add a Filter.
6. On the Filter Companies dialog box, select CRM/Custom Data > Salesforce.

Based on your selections, the filters appear under this tab.

This process is completely customizable based on the Salesforce fields your team has configured, allowing you to leverage Oracle DataFox for prospecting needs.

Uninstall Oracle DataFox Package from Salesforce

The following article walks you through uninstalling the Oracle DataFox - Salesforce integration.

To do so, you need to login to your Salesforce account and manually disable it from settings.

1. Once logged in to Salesforce, select Setup.
2. Navigate to Installed Packages. You can quickly locate this object by typing it in the search bar.
3. Locate DataFox Orchestrate from various installed apps.
4. Select **Uninstall**.
   On the next screen, you’re prompted to review what services are removed before uninstalling Oracle DataFox.

5. Scroll down to view several options. Select these as desired and then click **Uninstall**.

Troubleshoot Salesforce Sync Issues

You may see that accounts haven’t synced as expected during bulk sync. Here’s the workflow that you can use to troubleshoot when you have a sync issue.

1. Check your connection with Salesforce.
2. Check the bulk sync frequency.
3. Check the sync status of the account.
4. Confirm that the problem is a sync issue.
5. Resolve the sync issue. See Resolve Salesforce Sync Errors. Let's look at each of these steps in detail.

Check Your Connection with Salesforce

Go to Settings > Salesforce and confirm that the connection status in the Auth Settings section is Connected. If you aren't connected, set up your connection. See Connect Oracle DataFox to Salesforce.

You can try to sync an existing account or connect a new account from the Salesforce Accounts section on the company Overview page in DataFox to verify the connection.

Check the Bulk Sync Frequency

It's ideal to set a bulk sync frequency of 20,000 accounts per day. So, if you have more than 20,000 accounts and data was updated in DataFox only a day ago, chances are that your account hasn't synced yet. Wait for the required number of days for the sync to complete, or update your bulk sync frequency to sync more often.

For example, if you have 50,000 accounts and your sync frequency is set to 10,000 accounts every 3 days, then all the accounts are synced within 15 days.

Check the Account's Sync Status

The Salesforce Accounts section on the company Overview page shows the sync status of the account. If you see the sync button enabled or the company details are not visible in the Salesforce Accounts section, then the account hasn't synced with Salesforce. You can sync the account using either of these options:

- In DataFox, from the Salesforce Accounts section on the company Overview page.
- In Salesforce, from the DataFox News section of an account.

Confirm Sync Issue

To determine if the issue is sync related, check if the data is up to date and matches in both Oracle DataFox and Salesforce.

- If the data is outdated in both, it's not a sync issue. Click Suggest Edits on the company Overview page and submit a ticket.
- If the data is outdated in Salesforce, then it's a sync issue.

Resolve Salesforce Sync Errors

Before you use the details in this topic to resolve your sync issues, ensure that you have completed all the checks detailed in Troubleshoot Salesforce Sync Issues. If your issue is still not resolved, here’s what you can do:

1. Check the sync status of the account in any of these places:
   - Settings > Integrations > Synched Accounts
   - Settings > Integrations > Bulk Syncs
   - Salesforce Accounts section on the company Overview page. Go to Companies and click the required company to view the Overview page.

2. Click the sync status to view the error as listed in the Error column and follow the steps in the What You Need to Do column in the table below.
You can use the **All Filters** list on the Synced Accounts tab to select a status and all the accounts with that status are displayed. It’s good practice to regularly check the sync status of accounts and resolve issues if any.

**Note:** In the Salesforce Accounts section on the company Overview page, the Unknown SFDC error status is prefixed with this: **An unknown error occurred. Please contact support.**

<table>
<thead>
<tr>
<th>Sync Status</th>
<th>Error</th>
<th>Details</th>
<th>What You Need to Do</th>
</tr>
</thead>
<tbody>
<tr>
<td>No Permission on Fields</td>
<td>No Permission on Fields</td>
<td>Your sync user doesn’t have read or write access to one or more of the mapped fields in Salesforce.</td>
<td>Review field-level permissions in Salesforce and ensure that the sync user has permissions to read and write to all the fields that are mapped to Oracle DataFox. See <a href="#">Resolve Salesforce Field Permissions Errors</a>.</td>
</tr>
<tr>
<td>Syncing</td>
<td>Account stuck in ‘Syncing’ state</td>
<td>The company no longer exists in the DataFox database or the company got merged with another company. In this case, <strong>DF Last Sync Date</strong> most likely shows a value that’s older than 6 months from now.</td>
<td>In DataFox, disconnect the account from the Salesforce Accounts section on the company Overview page, review current companies to match with, and sync again. Alternatively, if a large number of accounts are impacted and need to be disconnected, log a service request and attach a file with the DF ID and Salesforce ID of each account that needs to be disconnected.</td>
</tr>
<tr>
<td>Synced (but the account has actually not synced)</td>
<td>The status is <strong>Synced</strong> but the <strong>DF Last Sync Date</strong> field shows a very old date</td>
<td>Although the status is Synced, the <strong>DF Last Sync Date</strong> field shows a very old date indicating that the account hasn’t been synced for a long time.</td>
<td>In DataFox, disconnect the account from the Salesforce Accounts section on the company Overview page, review current companies to match with, and sync again. Alternatively, if a large number of accounts are impacted and need to be disconnected, log a service request and attach a file with the DF ID and Salesforce ID of each account that needs to be disconnected.</td>
</tr>
<tr>
<td>Timed out</td>
<td>Timed out</td>
<td>There was no response from Salesforce in the allowed time frame.</td>
<td>Retry syncing the account or review the sync status after the next scheduled sync. If you’re still getting the sync error, contact Salesforce support.</td>
</tr>
</tbody>
</table>
| Auth token failed                    | Authentication Error: Expired Access/Refresh Token | The authorization for DataFox to read or write data to Salesforce has expired or has become invalid. This error occurs in the following scenarios:  
  - Salesforce is undergoing maintenance.  
  - The account used to set up the Salesforce integration has a corrupt or an expired token. | In DataFox, go to **Settings > Salesforce > Auth Settings**, and click **Reconnect**. |
| Unknown SFDC error                   | SFDCError: Inactive User: inactive user    | The user who set up the Salesforce integration has left the organization and the account is deactivated. | Change the Salesforce sync user. For details, see [Change Your Salesforce Sync User](#).  
  It’s good practice to use a dedicated Salesforce user account for the setup. |
<table>
<thead>
<tr>
<th>Sync Status</th>
<th>Error</th>
<th>Details</th>
<th>What You Need to Do</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unknown SFDC error</td>
<td>SFDError: Field Permissions Error: FLS Exception Account -&gt; [field name] (dfox)</td>
<td>The sync user doesn't have permissions to write to the specified field in Salesforce.</td>
<td>Provide the relevant permissions to the sync user. See <a href="#">Resolve Salesforce Field Permissions Errors</a>.</td>
</tr>
</tbody>
</table>
| Unknown SFDC error          | SFDError: Unknown SFDC Error: bad value for restricted picklist field: [field value from Oracle DataFox] | Salesforce rejected the value because of one of the following reasons:  
  - This value isn’t allowed in the mapped picklist field.  
  - There are dependencies between that field and other fields in Salesforce.  
  This happens most commonly for values configured in some Salesforce instances for industry, sub-industry, and country. | Review the picklist entries and dependencies on that field in Salesforce and ensure that the values stored in DataFox for this company are permitted. |
| Unknown SFDC error          | SFDError: Unknown SFDC Error: There's a problem with this country; even though it may appear correct. Please select a country/territory from the list of valid countries.: Shipping Country | Salesforce rejected the value because you have validation enabled for the shipping country and the DataFox country is not on that list. | Review the allowed list of countries in Salesforce and ensure that the values stored in DataFox for this company are permitted. |
| Unknown SFDC error          | SFDError: Apex Error: System.LimitException: Apex CPU time limit exceeded () | Salesforce internal error. | Retry syncing the account or review the sync status after the next scheduled sync. If you're still getting the sync error, contact Salesforce support. |
| Unknown SFDC error          | SFDError: API Rate limit exceeded | The Salesforce API received too many requests. | Retry syncing the account or review the sync status after the next scheduled sync. If you're still getting the sync error, contact Salesforce support. |
| Unknown SFDC error          | • SFDC Error: You're creating a duplicate record. We recommend you use an existing record instead.  
  • SFDError: Unknown SFDC Error: It looks like you may be creating or editing a duplicate record. We recommend you use an existing record instead. Contact your Admin if you have questions or want to continue.  
  • SFDC Error: Use one of these records? | Salesforce rejected DataFox's attempt to create a new account because the account already exists in Salesforce. | Update Salesforce settings to remove duplicate protection and try again if you want to create the account. |
<p>| Unknown SFDC error          | SFDError: Account Not Found Error: No object found with ID | The account that was being synced no longer exists in Salesforce. | Review the account and disconnect the sync if the account no longer exists in Salesforce. |
| Unknown SFDC error          | • SFDError: Unknown SFDC Error: Client network socket | Network error. | Retry syncing the account or review the sync status after the next scheduled sync. |</p>
<table>
<thead>
<tr>
<th>Sync Status</th>
<th>Error</th>
<th>Details</th>
<th>What You Need to Do</th>
</tr>
</thead>
<tbody>
<tr>
<td>disconnected before secure TLS connection was established</td>
<td>SFDCError: Unknown SFDC Error: read ECONNRESET</td>
<td>The DataFox value for <strong>City</strong> is too long for the mapped Salesforce field.</td>
<td>As Salesforce doesn't allow increasing the length of standard fields, use <strong>Suggest Edits</strong> on the company Overview page to submit a ticket requesting the <strong>City</strong> value to be corrected in DataFox.</td>
</tr>
<tr>
<td>Unknown SFDC error</td>
<td>SFDCError: Unknown SFDC Error: Shipping City: data value too large: &lt;&lt;large data value&gt;&gt; (max length=40)</td>
<td>The DataFox value for <strong>Zip/Postal Code</strong> is too long for the mapped Salesforce field.</td>
<td>As Salesforce doesn't allow increasing the length of standard fields, use <strong>Suggest Edits</strong> on the company Overview page to submit a ticket requesting the <strong>Zip/Postal Code</strong> value to be corrected in DataFox.</td>
</tr>
<tr>
<td>Unknown SFDC error</td>
<td>SFDCError: Field Mapping Error: No such column ‘Field__c’ on entity ‘Account’. If you are attempting to use a custom field, be sure to append the ‘__c’ after the custom field name. Please reference your WSDL or the describe call for the appropriate names. (dfox)</td>
<td>The Salesforce field which is causing the error is no longer present. The field could be in the DataFox field mappings or imported as a custom DataFox field.</td>
<td>The field is either removed or renamed. Review the mappings and the custom field settings in <strong>Settings &gt; Salesforce &gt; Synced Fields</strong> to resolve the issue, and then retry.</td>
</tr>
<tr>
<td>Individual Record Locked</td>
<td>SFDCError: Individual Record Locked: unable to obtain exclusive access to this record.</td>
<td>The record in Salesforce is locked. Therefore, Salesforce rejected the updates. Sometimes, records are locked due to issues with other apps.</td>
<td>Retry syncing the account. If it's not resolved, review the records with Salesforce support.</td>
</tr>
<tr>
<td>Possible Matches</td>
<td>Some possible matching accounts were found in Salesforce when attempting to sync this company.</td>
<td>DataFox has found a potential match in Salesforce for this company. This message is informational and not a sync error because the company hasn’t yet been matched with any account in Salesforce.</td>
<td>These messages don’t affect bulk sync and aren’t errors. However, you can review the possible matches in Salesforce and match the companies in DataFox to resolve them.</td>
</tr>
</tbody>
</table>
Chapter 6
Set Up and Administer Oracle Eloqua Integration

Considerations for Account vs. Contact Enrichment

You can use one of these two apps to integrate with Oracle DataFox: DataFox for Eloqua (Account Enrichment) or DataFox for Eloqua (Contact Enrichment). Use these considerations to determine which one works best for you.

- If you don’t use accounts at all in Oracle Eloqua, you must use the DataFox for Eloqua (Contact Enrichment) app.
- If you use accounts in Eloqua, it’s ideal to use the DataFox for Eloqua (Account Enrichment) app unless you have a significant number of contacts that aren’t associated with accounts.
- If you have over a million contacts, use the DataFox for Eloqua (Account Enrichment) app for better performance.

If you already have one of the DataFox for Eloqua apps installed and you want to switch to the other, keep these things in mind:

- Uninstall the existing sync app.
- Delete the Oracle DataFox custom fields that were previously created to avoid confusion with the new fields.
- Contact Oracle Support to get the install URL for the sync app that you want to install.

Set Up DataFox for Eloqua

Setting up Oracle DataFox for Eloqua is easy. Let’s look at what you need to do before you start setting up account or contact enrichment.

Before You Start

- Ensure that you have valid licenses for Oracle Eloqua and Oracle DataFox for Eloqua Cloud Service (also known as DataFox for Eloqua).
- After you place your order for DataFox for Eloqua, wait for Oracle Support to send you the welcome email.
- When you receive the welcome email, set up or activate your Oracle Cloud accounts.
- Choose whether to enrich accounts or contacts to determine your next step:
  - Set Up Account Enrichment
  - Set Up Contact Enrichment
Set Up Account Enrichment for Eloqua

Before you start the setup steps, review the **Account Fields** list on the Fields & Views page in Oracle Eloqua. To access the list, go to the Settings page in Oracle Eloqua, click **Fields & Views** in the Database Setup section, and then click **Account Fields**. Ensure that you have at least 13 custom account fields available. For a list of Oracle DataFox account fields, see [Oracle DataFox Fields for Account Enrichment](#). Ensure that at least one field is a Large Text data type field. At any given time, you can include not more than five Large Text data type fields.

### Install DataFox for Eloqua (Account Enrichment)

If your organization has single sign-on enabled, you must be the account owner to perform these steps.

1. Click the DataFox for Eloqua application installation URL that you received from Oracle Support.
2. On the Oracle Eloqua Sign In page, enter your company name and Oracle Eloqua user name and password, and click **Sign In**.
3. On the AppCloud authorization page, click **Accept and Install**.

The DataFox for Eloqua application is now installed, and you can view the application in your AppCloud Catalog My Apps list.

### Monitor Initial Matching and Enrichment for Accounts

After the application is installed, the matching process begins. You might want to create an Oracle DataFox view on the Accounts Overview page in Oracle Eloqua to verify if your accounts are being enriched. For more information, see [Creating account views](#).

You should start seeing the additional Oracle DataFox fields with firmographic and account score data for the accounts in Oracle Eloqua after about two hours of installing the app. The process may take up to 24 hours to complete. Go to the Accounts Overview page to check if accounts are being enriched with DataFox data.

The sync job runs every 24 hours and enriches new accounts added to Eloqua if they match with a DataFox company. The sync job also updates accounts if you make any changes to the DataFox data since the last sync.

This screenshot shows some of the enriched data fields listed in Oracle Eloqua.
Note: Time taken to complete the initial matching and enrichment may vary based on the number of Eloqua accounts.

If you don't see the Oracle DataFox fields, contact Oracle Support.

Calculate Oracle DataFox Match Rate for Accounts

Calculate match rate to know how many of the accounts in Oracle Eloqua match with the companies in Oracle DataFox. You can calculate the match rate only after the matching is complete.

Export the account data in Oracle Eloqua. For details, see Exporting accounts or contacts. If the account names in the exported file have corresponding DataFox IDs, that means the accounts were matched with DataFox companies. The match rate is the percentage of accounts with DataFox IDs.

Oracle DataFox Fields for Account Enrichment

<table>
<thead>
<tr>
<th>Oracle DataFox Field</th>
<th>Custom Field</th>
<th>Data Type for Eloqua Field</th>
<th>Description</th>
<th>Example Output</th>
</tr>
</thead>
<tbody>
<tr>
<td>id</td>
<td>DataFox Company ID</td>
<td>Text</td>
<td>ID of the company</td>
<td>5130efc98989846a3600107a</td>
</tr>
<tr>
<td>name</td>
<td>DataFox Company</td>
<td>Text</td>
<td>Name of the company</td>
<td>Oracle</td>
</tr>
</tbody>
</table>
Set Up Contact Enrichment for Eloqua

Before you start the setup steps, review the Contact Fields list on the Fields & Views page in Oracle Eloqua. To access the list, go to the Settings page in Oracle Eloqua, click Fields & Views in the Database Setup section, and then click Contact Fields. Ensure that you have at least 12 custom contact fields available on the Fields & Views page to display data from Oracle DataFox. Of these 12 custom contact fields, ensure at least one field is a Large Text data type field. At any given time, you can include not more than five Large Text data type fields. For a detailed list of Oracle DataFox fields, see Oracle DataFox Fields for Contact Enrichment.

If you want to use account scoring, it's a good idea to set up your account scoring criteria and tiers in Oracle DataFox before you install the DataFox for Eloqua app. You can then see the account score and tier data for the contacts in Oracle Eloqua immediately after the initial enrichment process. For more information, see Account Scoring.
Note: The account scoring data isn't displayed for companies that don't have an account score or account tier in Oracle DataFox.

Install DataFox for Eloqua (Contact Enrichment)

If your organization has single sign-on enabled, you must be the account owner to perform these steps.

1. Click the DataFox for Eloqua application installation URL that you received from Oracle Support.
2. On the Oracle Eloqua sign in page, enter your company name and Oracle Eloqua user name and password, and click Sign In.
3. On the AppCloud authorization page, click Accept and Install.

The DataFox for Eloqua application is now installed, and you can view the application in your AppCloud Catalog My Apps list.

Monitor Initial Matching and Enrichment for Contacts

After the application is installed, the matching process begins. You might want to create an Oracle DataFox view on the Contacts Overview page in Oracle Eloqua to verify if your contacts are being enriched. For more information, see Creating Contact Views.

About two hours after the app is installed in Oracle Eloqua, the accounts start getting enriched with Oracle DataFox data. The process may take up to 24 hours to complete. All the subsequent data retrievals occur every 24 hours. Go to the Contacts Overview page and check which accounts are enriched with firmographic and account score data. For example, the DataFox Company Revenue field displays the estimate of the enriched company's annual revenue.

This screenshot shows some of the enriched data fields listed in Oracle Eloqua.
If you don't see the Oracle DataFox fields, contact Oracle Support.

Calculate Oracle DataFox Match Rate for Contacts

Calculate match rate to know how many of the contacts in Oracle Eloqua match with the companies in Oracle DataFox. You can calculate the match rate only after the matching is complete. Go to the Contacts page and view the DataFox ID column to ensure matching is done. If you can't see the DataFox ID column, go to the Settings page for Fields & Views and ensure you add the DataFox ID column to a Contact View. You can also go to the Contacts page and select All Contact Fields from the Contact Views list.

Here's how you can calculate the number of Oracle Eloqua contacts that match Oracle DataFox companies.

1. Go to the Contacts page and record the number of contacts on the Contacts Overview page.
2. Go to Eloqua > Audience > Segments > Create a Segment.
3. On the Template Chooser dialog box, select Blank Segment, and click Choose.
4. Click the Add icon and select Filter Criteria.
5. From the Search for Filter Criteria menu, drag the Compare Contact Fields criteria two times into the main area of the page. Repeat these steps for each of the criterion:
   a. Double click the Compare Contact Fields criteria.
   b. From the Select a Field list, select DataFox Company ID.
   c. Select the not check box.
   d. In the Enter a value field:
      - For the first criterion, select in quicklist. In the Enter a value field, enter NoCompanyMatchFound, InsufficientConfidenceScore.
      - For the second criterion, in the drop-down list, select is blank.
6. Click Save.
7. On the Segment Chooser dialog box, enter a segment name and click Save.
8. Calculate the match rate by dividing the contacts in the segment by the contacts on the Contact Overview page and multiply with 100.

Assess Contacts that Didn’t Match

Here's how you can assess the number of Oracle Eloqua contacts that didn't match Oracle DataFox companies.

1. Go to the Contacts page and record the number of contacts on the Contacts Overview page.
2. Go to Eloqua > Audience > Segments > Create a Segment.
3. On the Template Chooser dialog box, select Blank Segment, and click Choose.
4. On the Segment, enter a name for the untitled segment and click **Save**.
5. Create two more segments and enter a name for both the segments.
6. Repeat these steps for all the segments.
   a. On the Segment, click the **Add** icon and select **Filter Criteria**.
   b. From the Search for Filter Criteria menu, drag the **Compare Contact Fields** criteria into the main area of the page.
   c. Double click the **Compare Contact Fields** criteria.
   d. From the **Select a Field** list, select **DataFox Company ID**.
   e. Select the appropriate value:
      - For the first segment, in the **Enter a value** field, enter **NoCompanyMatchFound**.
      - For the second segment, in the **Enter a value** field, enter **InsufficientConfidenceScore**.
      - For the third segment, from the drop-down list, select **is blank**.
   f. Save all the segments.
7. Add the number of contacts in all the segments to count the number of contacts that didn’t match Oracle DataFox companies.

You can divide the number of contacts derived in all the segments by the contacts on the Contact Overview page and multiply with 100.
You can also assess the contacts that didn't match for NoCompanyMatchFound, InsufficientConfidenceScore, and blank records separately. To do so, divide the contacts in the specific segment by the contacts on the Contact Overview page. For example, to know the contacts with NoCompanyMatchFound status that didn’t match, divide the contacts in that specific segment by the contacts on the Contact Overview page. Then multiply the result with 100.

### Oracle DataFox Fields for Contact Enrichment

Here’s the list of Oracle DataFox fields available for enrichment. This table lists all the Oracle DataFox fields and their mapping to the Oracle Eloqua fields. It also lists custom fields that are created when a corresponding Oracle Eloqua field doesn’t exist. This table includes the **Field Type** column to ensure that the fields are defined appropriately.

<table>
<thead>
<tr>
<th>Oracle DataFox Field</th>
<th>Custom Field</th>
<th>Data Type for Eloqua Field</th>
<th>Description</th>
<th>Example Output</th>
</tr>
</thead>
<tbody>
<tr>
<td>id</td>
<td>DataFox Company ID</td>
<td>Text</td>
<td>ID of the company</td>
<td>5130efc98989846a3600107a</td>
</tr>
<tr>
<td>name</td>
<td>DataFox Company</td>
<td>Text</td>
<td>Name of the company</td>
<td>Oracle</td>
</tr>
<tr>
<td>city</td>
<td>DataFox Company City</td>
<td>Text</td>
<td>City in which the company is located</td>
<td>Austin</td>
</tr>
<tr>
<td>state</td>
<td>DataFox Company State</td>
<td>Text</td>
<td>State in which the company is located</td>
<td>TX</td>
</tr>
<tr>
<td>country</td>
<td>DataFox Company Country</td>
<td>Text</td>
<td>Country in which the company is located</td>
<td>United States</td>
</tr>
<tr>
<td>top_keywords</td>
<td>DataFox Company Keywords</td>
<td>Large Text</td>
<td>List of the company's top keywords</td>
<td>software, cloud, computer</td>
</tr>
<tr>
<td>industry_name</td>
<td>DataFox Industry Name</td>
<td>Text</td>
<td>The company's industry name</td>
<td>Information Technology</td>
</tr>
<tr>
<td>subindustry_name</td>
<td>DataFox Subindustry Name</td>
<td>Text</td>
<td>The company's subindustry name</td>
<td>Enterprise Software</td>
</tr>
<tr>
<td>revenue_estimate</td>
<td>DataFox Company Revenue</td>
<td>Numeric</td>
<td>Estimate of the company's annual revenue</td>
<td>39,220,000,000</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td><strong>Note:</strong> The revenue is represented in U.S. dollars.</td>
<td></td>
</tr>
<tr>
<td>number_of_employees</td>
<td>DataFox Company Employees</td>
<td>Numeric</td>
<td>Estimate of the number of employees in the company</td>
<td>140,000</td>
</tr>
<tr>
<td>score</td>
<td>DataFox Account Score</td>
<td>Numeric</td>
<td>Account score of the company</td>
<td>100</td>
</tr>
<tr>
<td>tier</td>
<td>DataFox Account Tier</td>
<td>Text</td>
<td>Account tier of the company</td>
<td>Tier 2</td>
</tr>
</tbody>
</table>
How DataFox Companies and Eloqua Accounts or Contacts Are Matched

The matching process uses these fields in Oracle Eloqua to find the same company in DataFox:

- For accounts, the company name, company URL, and country. The company name is mandatory.
- For contacts, the contact’s email domain, company name, and country. The email domain and company name are mandatory.

**Note:** The terms company and account are used interchangeably in Oracle Eloqua.

If it finds a matching company, the process enriches the account or the contact in Oracle Eloqua by populating custom fields with additional data from Oracle DataFox.

The confidence score determines how closely an account or a contact in Oracle Eloqua matches a company in Oracle DataFox. When the system returns a matching company, Oracle DataFox records the company only if the match is above a specific confidence level. If an account or a contact is matched with multiple companies, Oracle DataFox only records the company match that has the highest confidence score.

If an account or a contact isn’t matched with a company, Oracle DataFox records the reason it wasn’t matched, and continues to the next account or contact. The DataFox Company ID field on the Accounts Overview or the Contacts Overview page displays the status of unmatched records.

**Note:** Oracle DataFox reattempts to match the unmatched records weekly, whereas any new records are matched daily.

This table lists the status of unmatched records along with the actions you need to take.

<table>
<thead>
<tr>
<th>Status of Unmatched Records</th>
<th>Scenario</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>InsufficientConfidenceScore</td>
<td>Accounts or contacts in Oracle Eloqua match with companies in Oracle DataFox, but the confidence score is less than 50%</td>
<td>For accounts, verify that the company name matches the URL and that both are spelled correctly.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>For contacts, verify that the company name matches the email address domain.</td>
</tr>
<tr>
<td>NoCompanyMatchFound</td>
<td>No likely matching company was found in Oracle DataFox</td>
<td>For accounts, verify that the company name and URL are correct.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>For contacts, verify that the company name and the email address domain are correct.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>You can then request to add the company to Oracle DataFox. For</td>
</tr>
</tbody>
</table>
# Uninstall DataFox for Eloqua

You can uninstall the DataFox for Eloqua app if you no longer want to pass data from Oracle DataFox into Oracle Eloqua.

Uninstalling an application removes all the links and authorizations related to the application. Uninstalling stops all scheduled jobs and updates. However, uninstalling the application doesn’t remove the existing Oracle DataFox data or custom contact fields from Oracle Eloqua. You need to delete the fields manually, if required.

To remove the app from your instance:

1. In Oracle Eloqua, click the **Settings** icon, and then click **Apps**.
2. Select the DataFox for Eloqua app, and click the **Uninstall** icon.

The DataFox for Eloqua app is now uninstalled.

# Reinstall DataFox for Eloqua

You might need to reinstall the DataFox for Eloqua app to reauthenticate and reauthorize the Oracle DataFox and Oracle Eloqua accounts. This list summarizes the scenarios where you may need to reinstall the app:

- If the initial installation begins but isn’t complete due to installation flow issues
- If the contacts are no longer enriched due to expired, lost, or invalid tokens
- If you need to change either of the authorized Oracle Eloqua or Oracle DataFox accounts

For help on unmatched records, contact **Oracle Support**.
After you reinstall the app, you must wait for the next sync to get the most updated data on your accounts or contacts. Reinstalling the app doesn't automatically update the accounts or contacts that were added since the last enrichment.

Here’s what you can do to reinstall the app:

**Note:** If you sign in using DataFox credentials, you can use the following steps to reinstall the DataFox for Eloqua app. If you sign in to DataFox using Oracle Cloud, you need to uninstall the app using the **Uninstall** icon and install it again.

1. In Oracle Eloqua, click the **Settings** icon, and then click **Apps**.
2. On to the AppCloud Catalog My Apps page, do one of these actions based on the state of your app.
   - If the app isn’t working and therefore needs to be reinstalled, click the **Reinstall** button against the app.
   - If the app is in a working state but needs to be reinstalled, select the DataFox for Eloqua app, and click the **Reinstall** icon. You could come across this scenario if the tokens expire or if the admin who was granted the token initially needs to be changed.

   This image illustrates the **Reinstall** icon for the DataFox for Eloqua (Contact Enrichment) app.

3. Sign in to Oracle Eloqua and Oracle DataFox to complete the authorization.

The DataFox for Eloqua application is now reinstalled. You can view the confirmation message after the app is reinstalled.

**Note:** The app is unavailable for all users during the reinstall.
7 Data Diagnostics

Overview of CRM Diagnostics and Enrichment

Data diagnosis is the first step in establishing a solid data foundation. Data diagnostics is a one-time activity. After you complete integration, Oracle DataFox analysts run data diagnostics to clean your company records. Oracle DataFox then matches your records with companies.

This image shows how data flows through the Oracle DataFox platform.

Signal and anomaly detection tools that are AI-based diagnose the data extracted from different sources. A series of algorithms detects each type of error and flags anomalies that may or may not be actual problems. After you validate and resolve the anomalies, a series of algorithms matches the data to Oracle DataFox company records. The result of this process is accurate firmographic and signal data.

Foundation of Data Diagnostics

Let's look at how data diagnostics lays the foundation for enrichment of your CRM.
Diagnose Data Issues

Oracle DataFox diagnoses data issues while matching your CRM records to company profiles. This table lists the different types of diagnostic results.

<table>
<thead>
<tr>
<th>Diagnosis Type</th>
<th>Definition</th>
<th>Example</th>
</tr>
</thead>
</table>
| Match Rate Assessment        | Percentage of accounts that match an Oracle DataFox company record. Each record is validated rigorously using AI-based algorithms. | Summary:  
Match: 35176 records (91.5%)  
Probable Match: 72 records (0.2%)  
Unmatched: 3194 records (8.3%) |
| Fill Rate Assessment         | Percentage of matched records that can be enriched for each data field type. | A fill rate of 100% for the URL field implies that 100% of the matched records contain data in the URL field. |
| Signal Counts Assessment     | Evaluates the matched records to display the total number of signal counts over the past year. | Out of 2122 signal counts, signal count for the Growth: Partnership or Joint Venture signal type in one year is 47. |

After the diagnosis, a report displays all the data inconsistencies.
Repair Data Inconsistencies
After you have diagnosed your CRM records to identify anomalies, you can opt to repair these data inconsistencies. To know more on how Oracle DataFox repairs data anomalies, see Data Diagnostics Report.

Match Records to Company Profiles
Match your records with Oracle DataFox companies to set up an automated data management system. Oracle DataFox uses AI-based matching tools and algorithms to match data. To know more, see How Records are Matched with DataFox Companies.

Enrich Records
Enrich your CRM application with Oracle DataFox firmographic information and growth signals on your top accounts. After you approve the data matches, an Oracle DataFox analyst will send you a file with enriched data. Either a sales admin or an Oracle DataFox analyst can use this file to integrate the enriched data with your CRM database.

If you have integrated with CX Sales or Salesforce, the sales admin or an Oracle DataFox analyst runs the initial bulk sync and updates all the data into your CRM database.

Refresh Your CRM Data
If you have integrated with CX Sales or Salesforce, go to the Oracle DataFox Settings page and apply bulk sync settings to refresh your data periodically.

Data Diagnostics Report
Oracle DataFox uses algorithms to inspect your company records for anomalies before enriching data. The algorithms match your CRM records with Oracle DataFox company profiles and highlight data inconsistencies and duplicate records. You can request Oracle DataFox to provide the Match Rate Assessment reports in CSV and pie chart so that you can take corrective actions.

Let’s walk through the categories in which data is diagnosed.

- Unmatched or Irregular: No high confidence match is found for this company record
- Duplicate: Two or more records exist for the same company
- Verified: Company records with categories Matched and Probable Match that are high confidence matches without data anomalies

This screenshot shows the match rate assessment for a sample company records in a pie chart.
This screenshot shows match rate assessment for the unmatched records.

Let's understand each of these categories.

**Unmatched or Irregular Anomaly**
This table details the issues in the unmatched and irregular anomaly category. You can find this diagnostics type listed as Unmatched in the pie chart and Irregular in the CSV report.

<table>
<thead>
<tr>
<th>Issue Name (Pie Chart)</th>
<th>Issue Name (CSV file)</th>
<th>Description</th>
<th>Example</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email Provided Not Matched</td>
<td>Email</td>
<td>The report highlights URLs that look like email addresses to prevent incorrect matching of companies such as Google, Yahoo or any other major email domain provider.</td>
<td>• Company name: Blue Semiconductor Email: <a href="mailto:bluesemiconductor@gmail.com">bluesemiconductor@gmail.com</a> • Company name: First Software Email: <a href="mailto:firstsoftware@yahoo.fr">firstsoftware@yahoo.fr</a></td>
<td>Edit and update the URL to resubmit for matching or ignore the error. Your company isn't matched if you ignore the error.</td>
</tr>
<tr>
<td>NA</td>
<td>Human Matching</td>
<td>Because of a low confidence score, a sales admin or an Oracle DataFox</td>
<td>• Company name: PennyPack Systems</td>
<td>Edit and provide the correct information or ignore the...</td>
</tr>
<tr>
<td>Issue Name (Pie Chart)</td>
<td>Issue Name (CSV file)</td>
<td>Description</td>
<td>Example</td>
<td>Action</td>
</tr>
<tr>
<td>------------------------</td>
<td>-----------------------</td>
<td>-------------</td>
<td>---------</td>
<td>--------</td>
</tr>
</tbody>
</table>
| Invalid Name           | Invalid name          | The company name is incomprehensible. | • BNA c/o
• Hamilton + Partners
• VidaXL (SH)
• POL | Edit and provide the invalid name to resubmit for matching or ignore the error. Your company isn’t matched if you ignore the error. |
| Invalid URL            | Invalid URL           | Corrupt or incorrectly formatted URL that doesn’t direct to a company website. | • http:
• http://visioncorporation.com
• http://visioncorporation...com
• no url
• n-a | Find correct URLs and then resubmit to Oracle DataFox for matching or skip the records. Your company isn’t matched if you skip the record. |
| Name and URL Mismatch  | Mismatched Query Data | Oracle DataFox detects cases where the company name points to one company and the URL points to another. Often, these cases are just fine, but they’re flagged so you can decide how to handle them. | • Company name: Fantastic Laptops
URL: greencorp.com
• Company name: Spruce Street Foods
URL: firstsoftware.de | Check the results and determine whether you want Oracle DataFox to match to the company name or to the URL. If not, ignore the error. Your company isn’t matched if you ignore the error. |
| No URL Provided, Name Only Match Fail | Missing URL | The company record contains a common name but doesn’t include a web link. | • Company name: Green Corp.
URL: NA | Edit and provide the URL to resubmit for matching or ignore the error. Your company isn’t matched if you ignore the error. |
<p>| No URL Match           | No URL Match          | The URL for this company record doesn’t match any Oracle DataFox company URL | NA | Check if the URL is correct. If it’s correct, raise a request to get the company added. |
| Parked Domain          | Parked Domain         | Oracle DataFox’s matching algorithm detects if the URL redirects to a parked domain. | • pennypacksystems.com redirects to bigcomputers.com | Edit and update the URL to resubmit for matching or ignore the error. Your company isn’t matched if you ignore the error. |</p>
<table>
<thead>
<tr>
<th>Issue Name (Pie Chart)</th>
<th>Issue Name (CSV file)</th>
<th>Description</th>
<th>Example</th>
<th>Action</th>
</tr>
</thead>
</table>
| Shortened URL         | Shortened URL         | Sometimes, company records contain a URL shortcut, rather than the company's actual URL. | • bit.ly/abc  
• ow.ly/xyz | Find the correct URL and then submit to Oracle DataFox for matching or ignore these records. Your company isn't matched if you ignore the record. |
| Vanity URL            | Vanity URL            | Identifies organizations that maintain a profile and classifies them as vanity URLs. Vanity URLs indicate if a company is small or has a minimal web presence. | • Vanity profile for Seven Corporation  
• Vanity profile for PennyPack Systems | Check the results. In some cases, the Vanity URL is replaced by the actual company website URL. In other cases, it's an obscure company without its own website. |

### Duplicate Anomaly

You can find the records marked as duplicate in both the CSV and pie chart reports. This table details the issues in the duplicate anomaly category.

<table>
<thead>
<tr>
<th>Issue Name (Pie Chart)</th>
<th>Issue Name (CSV file)</th>
<th>Description</th>
<th>Example</th>
<th>Action</th>
</tr>
</thead>
</table>
| Name Duplicate, No match | Name Duplicate | Two or more different companies share the same name. Here's the list of scenarios when duplicate name issues occur.  
• Duplicate records for the same company.  
• Different companies with the same name.  
• Fake placeholder names. | • Three records named as First Software  
• Multiple companies named as Big Computers  
• Multiple records are named XYZ, No Name, NewCo, or Test. | • Link or merge the records in your CRM.  
• Ignore. There's nothing wrong.  
• Find the correct name of the company or flag the records as dubious. |
| NA                    | Name and URL Duplicate | Two different company records share the same name and URL. | | Merge or link the company records. |
### Issue Name (Pie Chart) | Issue Name (CSV file) | Description | Example | Action |
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>NA</td>
<td>Post-match Duplicate</td>
<td>Some company records are duplicates even if the company names and URLs appear to be different. This may occur if the same company has multiple names and URLs. Oracle DataFox company profiles store all the names and domains and hence, it’s possible to detect the post-match duplicates.</td>
<td>URL: bluesemiconductor.com</td>
<td>Link or merge the records in your CRM.</td>
</tr>
<tr>
<td>NA</td>
<td>Redirected URL Duplicate</td>
<td>Oracle DataFox matching algorithm detects if a given URL redirects to an entirely different URL or to the same URL in another record.</td>
<td>pennypack.com and pennysystems.com both redirect to pennypacksystems.com.</td>
<td>Link or merge the records in your CRM.</td>
</tr>
<tr>
<td>URL Duplicate, No match</td>
<td>URL Duplicate</td>
<td>Two or more companies have the same URL domains.</td>
<td>Spruce Street Foods and Spruce Foods both have the same URL domain <a href="http://www.sprucestreetfoods.com">www.sprucestreetfoods.com</a></td>
<td>Link or merge the records in your CRM.</td>
</tr>
</tbody>
</table>

**Verified**

Your company records can return without any anomalies and pass as verified. You can find these records only in the CSV report. Here’s the list of scenarios when your company records are classified as verified.

<table>
<thead>
<tr>
<th>Scenario</th>
<th>Description</th>
<th>Example</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Auto Matched</td>
<td>Your record matches with an Oracle DataFox record with a high confidence score.</td>
<td>Input name, Tall Manufacturing Inc. is matched with the Oracle DataFox name, Tall Manufacturing</td>
<td>No action necessary. Your record is ready to be enriched with Oracle DataFox info.</td>
</tr>
<tr>
<td>Matched By Humans</td>
<td>Your record passed the anomaly tests, but the company records didn’t match an Oracle DataFox company profile with high confidence score. Either the company record points to more</td>
<td>Input name, TM Software is matched with the Oracle DataFox name, Tall Manufacturing</td>
<td>No immediate action is necessary. These scenarios required a specialist to look at the records and verify.</td>
</tr>
<tr>
<td>Scenario</td>
<td>Description</td>
<td>Example</td>
<td>Action</td>
</tr>
<tr>
<td>-------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>-------------------------------------------------------------------------</td>
<td>-----------------------------</td>
</tr>
<tr>
<td>Already Matched</td>
<td>Company records are matched and rematched multiple times. This status implies that the record was matched earlier during a prior matching process, and no anomalies were detected.</td>
<td>Input name, Oracle is matched with the DataFox name, Oracle</td>
<td>No action is needed.</td>
</tr>
</tbody>
</table>

### How Records are Matched with DataFox Companies

The algorithms match company names and URL records to establish a match between accounts in your CRM application and companies in Oracle DataFox. It’s important to standardize your account records before searching for potential matching companies. For example, removing common designations like Corporation and LLC, and standardizing www.oracle.com/index.html as oracle.com.

The matching tools also update and match outdated company names and URLs from your records. For example, an account record with an outdated company name is identified and matched with the Oracle DataFox company name that has the latest branding.

This table shows examples of how data is matched. The values mentioned in these columns are for example only.

<table>
<thead>
<tr>
<th>Match Type</th>
<th>Name in CRM</th>
<th>URL in CRM</th>
<th>Oracle DataFox Name</th>
<th>Oracle DataFox URL</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>Match</td>
<td>Seven Corporation</td>
<td>NA</td>
<td>Seven Corporation</td>
<td><a href="http://www.sevencorporation.com">www.sevencorporation.com</a></td>
<td>This example is a straightforward auto match. Even though there was no customer-provided URL, the name of Seven Corporation was enough to ensure a match.</td>
</tr>
<tr>
<td></td>
<td>Fantastic Laptops</td>
<td><a href="http://www.fantasticlaptops.com/officelist">www.fantasticlaptops.com/officelist</a></td>
<td>F-Laptops Co. Ltd.</td>
<td><a href="http://www.fantasticlaptops.com">www.fantasticlaptops.com</a></td>
<td>This is an auto match and the URL is standardized.</td>
</tr>
<tr>
<td>Probable Match</td>
<td>PennyPack Systems</td>
<td><a href="https://www.pennypacksystem.com">https://www.pennypacksystem.com</a></td>
<td>Penny Systems</td>
<td><a href="http://www.pennysystems.com">www.pennysystems.com</a></td>
<td>Oracle DataFox found the correct name and updated the URL.</td>
</tr>
<tr>
<td>Match Type</td>
<td>Name in CRM</td>
<td>URL in CRM</td>
<td>Oracle DataFox Name</td>
<td>Oracle DataFox URL</td>
<td>Result</td>
</tr>
<tr>
<td>------------</td>
<td>---------------------</td>
<td>------------</td>
<td>---------------------</td>
<td>--------------------------</td>
<td>----------------------------------------------------------------------</td>
</tr>
<tr>
<td>Duplicate</td>
<td>Tall Manufacturing</td>
<td>NA</td>
<td>Tall Manufacturing</td>
<td>tallmanufacturing.com</td>
<td>Matched to same Oracle DataFox ID, but two different CRM records exist.</td>
</tr>
<tr>
<td></td>
<td>Tall Manufacturing</td>
<td><a href="http://www.tallmanufacturing">www.tallmanufacturing</a></td>
<td>Tall Manufacturing</td>
<td>tallmanufacturing.com</td>
<td>Matched to same Oracle DataFox ID, but two different CRM records exist.</td>
</tr>
<tr>
<td>Unmatched</td>
<td>Large and Associates</td>
<td>NA</td>
<td>NA</td>
<td>NA</td>
<td>Not a legitimate company.</td>
</tr>
<tr>
<td></td>
<td>Large and Associates</td>
<td><a href="http://www.largeandassociates">www.largeandassociates</a></td>
<td>Large and Associates</td>
<td>largeandassociates.com</td>
<td>Name and URL don't match.</td>
</tr>
</tbody>
</table>
8 Enrich Oracle CX Sales

Overview

Integrate your Oracle CX Sales instance with Oracle DataFox to enrich your accounts with the most accurate information of your companies. Here are some benefits of enriching your account with Oracle DataFox:

- Grow revenue faster by identifying the right companies within Oracle DataFox to market and sell to.
- Identify the companies to sell your product to, within your total addressable market.
- Improve your territory management through enriched accounts. For more information on how to implement territories, see Steps to Implement Territories.
- Set up Company Signals to get the latest information on your prospects. For more information, see Overview of Company Signals.

To integrate with Oracle CX Sales, see Integrate with Oracle CX Sales.
To get started with Oracle DataFox, see Welcome to Oracle DataFox.

Sync and Enrich Your Account

You can enrich your account either by matching a company with your account in Oracle DataFox or in Oracle CX Sales.

At the start of your engagement, Oracle Support matches all your accounts to relevant companies. If you create accounts in Oracle CX Sales after the initial matching, you must manually enrich and sync these new accounts with Oracle DataFox companies.

Before you begin, ensure that your initial matching and enrichment is completed. Contact Oracle Support if you are unsure on the status of your integration.

Enrich Your Account from Oracle DataFox

Here’s how you can sync and enrich an Oracle CX Sales account to a matching company.

1. Sign in to Oracle DataFox.
2. Click the Companies tab.
3. Select the company that you want to sync with your account.
4. In the Oracle CX Sales Accounts section, click Connect to Oracle CX Sales. This option is displayed if you’re connecting to Oracle CX Sales for the first time.
5. Perform one of the following actions:

- Select **Sync to an existing Oracle CX Sales Account** if an account exists for the company. Enter the registry ID, which is also known as the Party Number.

  **Note:** You can get the Registry ID or the party number from the account view in Oracle CX Sales. If you do not see the party number in the account view, use Application Composer to configure the field. For details, see *Add Objects and Fields*.

- Select **Create a New Account** if an account doesn’t exist for the company. Sync the company to the new account after you create it.

  **Tip:** If you sync your account with an incorrect company, disconnect the sync and connect it to the correct company. To disconnect, click the **Options** (dots) icon on the synced account and then click **Disconnect**.
6. To connect multiple accounts to the same company, enter the registry ID or the party number in the Connect Another Account field, and click Sync.

Enrich Your Account from Oracle CX Sales

You can enrich account in your Oracle CX Sales with Oracle DataFox data without leaving the application. You can then update data on individual account records without waiting for the nightly Oracle DataFox sync jobs. Here’s how you can enrich your account from Oracle CX Sales.

1. Ensure your administrator has enabled data enrichment from Oracle DataFox. For details, see Enable Oracle DataFox Features in CX Sales.
2. Sign in to Oracle CX Sales.
3. On the Edit Account page, click Actions, and then click Enrich Account.

You can now see fields with Oracle DataFox data on the Edit Account page.

Smart Talking Points in Oracle CX Sales

Engage in more productive conversations with your customers and prospects using the Smart Talking Points feature. You can find smart talking points in the Account Intelligence tab on the Account page in Oracle CX Sales. Your administrator might have also enabled the tab on the Opportunity page.

Note: Oracle recommends Account Intelligence as the tab name. However, your administrator might have used a different name.
The Account Intelligence tab shows two features.

- Account Score
- News Signals

**Account Score**

Use the Account Score section to view the account score, the tier it belongs to, and the account scoring criteria. Prioritize accounts based on a combination of the account score and the tier.

Let's look at an example screenshot that shows the account score for CrowdStrike. The account score is 380 and the account belongs to tier 1. You know immediately that CrowdStrike is one of your top-ranking accounts and you pursue it on priority. You want to know how the account got a score of 380, and you look into the account criteria. For example, you see that CrowdStrike is an Information Technology company and that category has been assigned a weight of 50 points in Oracle DataFox.

If you want to update weights to criteria, contact your administrator. For details, see *How You Use Account Scoring*.

You can view the entire list of your accounts showing the account score on the Accounts page.

**News Signals**

Use the News Signals section to get the latest news on your account. Here's how news signals can benefit you:

- Limit your time on researching accounts. Get the latest account-related information directly from the news signals.
- Engage in productive conversations with current customers and new prospects.

For details, see *Overview of Company Signals*. 
It's important to know that certain signal types may not show in the News Signals section based on the settings made by your administrator. For more information, see *Enable Smart Talking Points in Oracle CX Sales*.

**Smart Talking Points in Oracle Sales Assistant**

You can view signals and account score data from Oracle Sales Assistant. This screenshot shows Sales Assistant working with Microsoft Teams, and displays details of an account enriched with Oracle DataFox data.

Based on the settings made by your administrator, certain signals may not show up from Oracle Sales Assistant.
9 Enrich Salesforce

Overview of Salesforce Data Enrichment

Integrate Salesforce with Oracle DataFox to enrich your Salesforce accounts, leads, and contacts. Here are some benefits of integrating with DataFox.

- Use account scoring to identify your ideal customer profile and prioritize and target the right accounts. See Account Scoring.
- Manage and prioritize conferences to generate network leads and new business using conference intelligence. See Conference Intelligence.
- Track your accounts effectively using filters. See Prioritize and Track Companies.
- Get signals for Salesforce accounts in your email or Slack. See Signal Alerts.
- Connect leads to your account-based marketing strategies effectively. See Inbound Marketing Intelligence.

By connecting your DataFox user to your Salesforce user profile, you can do the following:

- Sync a new or existing company to a Salesforce account.
- Refresh a synced Salesforce account.
- Disconnect an existing Salesforce account.
- Connect a secondary Salesforce account to a DataFox company.
- Promote a secondary Salesforce account to be the primary account for a company with many-to-one Salesforce mapping. For details, see Many-to-One Salesforce Mapping.

Connect Your Oracle DataFox User to Your Salesforce User Profile

Connect with your Salesforce user profile to activate the sync between Oracle DataFox and Salesforce. By default, salespeople can connect to their Salesforce user profiles or the admin can handle the connection for all users. You can see the bulk sync details and other Salesforce settings only after you set up this connection. Let's see how you can do this.

1. Sign in to Oracle DataFox.
2. Click your user name, and then click Settings.
3. Under Integrations, click Salesforce.
   You can see that DataFox and Salesforce shows connected but Your Salesforce user isn't connected.
5. Click Connect.

   Note: If you don’t see the Connect button, contact your admin to connect your DataFox user to your Salesforce user profile.
You're redirected to the Salesforce log in page.
6. Enter your Salesforce credentials and click **Log In**.
You're now connected to Salesforce.

**Sync and Enrich Your Accounts**

Your admin has probably set up accounts to sync regularly, but you can refresh the sync at any time. You can sync one company, or multiple companies, or if your admin has enabled it, you can bulk sync all companies at once.

**Sync One Company Instantly**
1. Sign in to Oracle DataFox.
2. On the home page, search for the company that you want to sync.
3. In the Salesforce Accounts section, click **Sync**.

The company is synced to Salesforce instantly. Now you can open the synced account in Salesforce by clicking the company name in the Salesforce Accounts section.

**Sync Multiple Companies Instantly**
1. Sign in to Oracle DataFox.
2. Click the **Companies** tab.
3. On the Company Search page, select the companies that you want to sync to Salesforce.
4. Click **Sync to Salesforce**.
Note: If you cannot see this button, your admin has disabled this feature for you.

Bulk Sync Companies on a List

You can sync all companies from Oracle DataFox to Salesforce using bulk sync. By syncing companies to Salesforce, you can create accounts in Salesforce. To use bulk sync, you must create a static or dynamic list. For details, see Overview of Static and Dynamic Lists.

1. Sign in to Oracle DataFox.
2. Click the Lists tab and use an existing list if the data in the list is relevant to you. If not, create a static or a dynamic list according to your requirement.
3. From the list, select the companies that you want to sync.
4. Click Sync to Salesforce.

You may receive a message to check for matching companies. Otherwise, the companies are synced to Salesforce.

Go to Settings > Salesforce > Bulk Syncs to see the details of the completed syncs. The time displayed in the Bulk Sync History table is your local time.

You can see if the bulk sync completed successfully in the Sync Status column. To troubleshoot sync issues, see Troubleshoot Salesforce Sync Issues.

Note: If the list has new companies to sync, it can take up to a few hours before the list completely syncs to Salesforce.

Use Salesforce Filters

Oracle DataFox has multiple filters that help you find specific accounts and prioritize new targets. You can use data from Salesforce and create a list of target companies using the custom Salesforce filters.

To use these filters, you must integrate with Salesforce and connect to your Salesforce user profile. See Integrate with Salesforce and Connect Your Oracle DataFox User to Your Salesforce User Profile or check with your Salesforce admin.

1. Sign in to Oracle DataFox.
2. Click the Companies tab.
3. On the Company Search page, click Add a Filter.
4. In the Filter Companies dialog box, click CRM/Custom Data > Salesforce to view the filters specific to Salesforce.
5. Select the filters that you want, and click Apply.

You can do the following with the filtered list of companies:

- Save your search to track companies easily, sync them to Salesforce, and search for signals or insights. See Discover Accounts with Summaries.
- Create email or slack alerts to receive notifications and stay up to date with signals on the filtered accounts. See Create Salesforce Email and Slack Alerts.
- Add filters as columns to your Company Search page. Click the Customize fields icon and select the filters that you want to add as columns. For example, add the SFDC Leads column and sort it in descending order to identify companies with most leads.
Examples of Salesforce Filters

There are several reasons why you would want to use the Salesforce filters. This table lists a few examples of when you would use the filters along with values you would set for the filters. Go to Companies > Add a Filter > CRM/Custom Data > Salesforce to set these filters.

<table>
<thead>
<tr>
<th>Objective</th>
<th>Filter</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Find all the accounts you own</td>
<td>Salesforce Account Owner (DataFox Field)</td>
<td>Your name</td>
</tr>
<tr>
<td>Target new accounts</td>
<td>Salesforce Account (DataFox Field)</td>
<td>Accounts not synced to Salesforce</td>
</tr>
<tr>
<td>Identify new prospects</td>
<td>Salesforce Account (DataFox Field)</td>
<td>Accounts where my team has no Leads</td>
</tr>
</tbody>
</table>

View Opportunity Info on Synced Company Profiles

If your team has enabled syncing Salesforce opportunities, you can see opportunity info on Oracle DataFox company profiles synced to Salesforce. See: Set Up Salesforce Sync for Opportunities.

The opportunity info can give you more context on accounts with historical business opportunities.

To see opportunity info, navigate to the Oracle DataFox company profile and click the Salesforce Opportunities tab, as shown in this screenshot.

The opportunity info includes the opportunity name, opportunity owner, stage, amount, and close date.

Search for Salesforce Opportunities in Oracle DataFox

You can search and filter your lists using your Salesforce opportunity info. Your opportunity info can be helpful in understanding which companies might be more relevant due to past business opportunities or the last time an account went through your sales cycle.
To search and filter by opportunities, use the **Add a Filter** option and click **Salesforce**. Under Opportunities, there are options to filter by the number and amount of Salesforce for open opportunities, closed won opportunities, and closed lost opportunities, as shown in this screenshot.

The option appears when you segment the companies.

**How to Export Salesforce Accounts for Oracle DataFox Import**

Salesforce allows you to export different account details and important date nodes. Let's look at how you can do this.

1. Navigate to the Reports tab and click **New Report**.

2. Expand the **Accounts and Contacts** folder and select **Accounts**. Then, click **Create**.
3. Set these filters:
   - Show = All Accounts
   - Date Field = Date Created
   - Range = All time

   This screenshot shows the filters.

4. Add these fields to the report, as shown in the screenshot:
   - **Note**: The selected field names may be different per preference.
     - Account Name
     - Account ID
     - Website
     - City
     - State
     - Country
5. Click **Run Report**.

6. To export the report to an excel file (.xls), click **Export Details**.

7. Click **Export**.
Now you know how to export valuable Salesforce data.

Salesforce Account and Lead Matching Logic

Oracle DataFox helps you maintain a clean CRM by matching your records in Salesforce with the Oracle DataFox database. Analysts at Oracle DataFox verify millions of AI-sourced business insights and maintain the integrity of this data. This topic explains the matching logic in this article to provide details about the process.

Here's the process for matching accounts and leads:

- New accounts: Oracle DataFox uses a waterfall approach which attempts to match both account names and websites. If the account name cannot be matched, then only the website is matched. Or, if the website cannot be matched, then only the account name is matched.

- New leads: Lead email address domains are used to match leads for a company profile. If the domain can’t be matched or is a generic domain (such as gmail.com), Oracle DataFox attempts to match using the Company field on a lead object.

Sync a List Name to Salesforce

As an admin, you can sync list names to Salesforce. The synced list names appear in a custom field created in Salesforce for DataFox. This field displays all the list names that a specific account is a part of in DataFox. Before you start syncing list names, ensure the following:

- You’re connected to your Salesforce instance. For details, see Connect Your Oracle DataFox User to Your Salesforce User Profile.
- Your list has a generic name so that all users can understand the list names.

There are two ways to sync list names to Salesforce. You can sync from the Lists page or you can open a specific list from the Lists page and then sync the list name.

1. Click the Manage List Name Syncing to Salesforce icon.

   This screenshot shows the sync icon on the Lists page.
2. In the Sync List Name to Salesforce dialog box, enable the sync.

The list name is synced to Salesforce during the next bulk sync. You can also sync the list instantly. For details, see Resync List Names to Salesforce Instantly.

Reports in Salesforce Using DataFox List Names

You can create a report in Salesforce for the list names synced from Oracle DataFox to identify prospective clients. While creating a report, keep these things in mind:

- Specify that the report must contain all the accounts of the synced list.
- When you apply the Contains filter, only the first 1000 characters of the field are searched for matches in reports. So, if you’re syncing many DataFox lists, ensure that the search criteria you’re using in Salesforce can correctly locate the list name in all cases.

For example, if you’re trying to create a report for the lists filter with accounts that contain the term TopProspects, ensure that the term is mentioned within the first 1000 characters of the DF Lists field.

Resync List Names to Salesforce Instantly

If you want to resync the list names to Salesforce instantly, navigate to Settings > Salesforce > Synced Lists.

Select your preferred lists and click Resync List Names.
Note: This sync may take several hours before you can see it in your Salesforce instance.

You can organize stronger marketing campaigns and reach out to prospective new clients using this feature.

Account Scoring for Sales Reps

This topic is meant for Salesforce users only.

Leveraging Account Scoring
Account Scoring gives the opportunity to weigh companies based on characteristics important to your organization while helping you find and prioritize your best fit accounts.
For instance, the Oracle DataFox score is transparent and flexible so your team can control the criteria feeding into the algorithm. This criteria is based on info dense sources, built from 4 data sets:

- Custom Salesforce information on the account (e.g. tier, custom industry, etc)
- DataFox firmographics (headcount, location, etc.)
- DataFox Signals (leadership changes, office expansions, etc.)
- Conference attendees or public curated lists (Dreamforce, Inc 5,000, etc.)

Let's see how to leverage Account Scoring below.

Prioritizing Account Scores

1. To prioritize your named account list, first, login to your Oracle DataFox instance. Afterward, navigate to the Companies tab.
2. Select Add a Filter and navigate to the Salesforce selection under CRM/Custom Data.
3. In the Salesforce section, you should see Salesforce Account Owner and the reps associated with this criteria. In this example, let's use Brian. Select the Account Owner, and then click Apply.
A list of companies with Account Scoring weights appears. If you don’t see the Account Scoring column, however, you need to adjust your fields.

4. To add the column, select the **Customize fields** icon.

5. In the Inactive Fields section, search for Account Score. Click it to add it to the Active Fields section. You may drag it to organize its placement in Oracle DataFox. Click **Close**.

6. When this is applied, Account Scoring should now appear in your instance.

The companies with your Account Scoring weights appear. To prioritize, select the Account Scoring field and select **Sort Descending**.
The highest weighted company appears at the top of the list, ideal for targeting best fit accounts. Sales reps can view the scoring criteria by clicking into the company name to view the profile or by looking at the Salesforce iFrame.

Prospecting
The criteria thus far typically involves companies that you know exist. However, you can use Account Scoring to target prospects that don't currently exist within your Salesforce instance.

To identify these companies, let's see a potential method with this example.

1. Navigate to the Companies tab and select Add a Filter and filter for your ICP. In this example, let's use multiple selections: Industry Keywords >> SaaS, Location >> United States, and Headcount >> 100 Minimum.
2. To identify only net new opportunities leverage the Salesforce filter and change the option to Only show accounts not Synced to Salesforce.
3. Now that you have a list of prospects that fit your ICP, you may want to sort by descending under the Account Score column. If you discover interesting accounts, you can select the check box next to the name and click the Sync to Salesforce button.

Use Chrome Extension for Prospecting
You may also target specific companies by utilizing the DataFox Chrome extension.

From a website, simply select the DataFox Chrome extension. Once done, a tab appears with details about the website and company.

The profile also displays the custom Account Score to provide talking points when doing outreach. If the company is a good fit, you can push it to Salesforce directly in the chrome extension to claim this account.
Salesforce Frequently Asked Questions

What is the difference between Enrichment and Sync?
Enriching your leads and accounts can be done effectively by syncing all your accounts/contacts from Oracle DataFox into your CRM (Salesforce).

Syncing Accounts
Please note that the syncing can only be done when you have connected your Oracle DataFox account to Salesforce. You can sync one or multiple accounts, and it can be done in an instant. Just a few clicks here and there.

Connecting Oracle DataFox Users to Salesforce Accounts
To better enrich your leads and accounts, you get 40+ verified company data points on contacts, leads, and accounts on your database. You can get a comprehensive CRM diagnostic report that can help you compare your data against the system's completely-clean, proprietary data.

CRM Enrichment Overview
CRM Diagnostics Overview
I'm receiving an error message that says user isn’t admin approved to access the app. How do I resolve this?

You're getting this error message because certain users in Salesforce aren't authorized to access the Oracle DataFox integration. To resolve this, navigate to Setup > Manage Connected Apps > Oracle DataFox > Manage Profiles, and select which user groups should have permission.
10 Enrich Oracle Eloqua

Benefits of Integrating with Oracle DataFox

When you set up the DataFox for Eloqua app, your accounts or contacts in Oracle Eloqua are automatically enriched with firmographic and account scoring information.

In Oracle Eloqua, leads are called contacts.

The integration is simple. Download the DataFox for Eloqua app from the app store and get started. For details, see Set up and Administer Oracle Eloqua Integration.

Examples for Enrichment

You can use data from Oracle DataFox to target your best-fit contacts and run successful marketing campaigns. Let's look at some examples of how you can benefit from Oracle DataFox data.

Small-Scale Companies in Specific Locations
Your organization has added a new product or product line, and market research has suggested it could likely be very popular with small-scale businesses in specific locations. You use Oracle DataFox data to easily identify these customers and you run an email campaign targeted at these customers only.

Company Size and Industry
You are selling HR services tailored to the healthcare industry. You want to target companies in the healthcare domain who have over 1000 employees. You use data from Oracle DataFox to filter these companies and message them.

Account Score
You have a special offer that you only want to offer to your best accounts or contacts. You know that the best way to find out who to target is to use the account score information from Oracle DataFox. You quickly identify all accounts or contacts that have an account score of more than 80% and you’re ready to send out your offers.

Example of Using Oracle DataFox Data for a Marketing Campaign
Use Oracle DataFox data to target accounts based on firmographics and headcount. In this example, the contacts have been enriched with DataFox data. If you’re enriching your accounts instead, you follow the same steps and add the Compare Account Fields filter criteria to your segment.

In this example, you create an email marketing campaign in Oracle Eloqua, targeting construction companies with more than 5000 employees.

1. Create a draft for a promotional email message. For more information, see Creating emails using the Source Editor and Creating emails in the Design Editor.
2. Create a segment to specify the criteria of contacts in the construction industry with over 5000 employees. For more information, see Creating Segments.
   a. Add a filter criteria.
   b. Search for and double-click the Compare Contact Fields filter criteria to add it to the segment.
   c. Double-click the filter criteria that you added to the segment, select DF_company_industry_name, and enter the value Construction.
   d. Double-click another Compare Contact Fields filter criteria to add it to the segment.
   e. Double-click the filter criteria that you just added to the segment, select DF_company_number_of_employees, and set the value to be greater than 5000.
   f. Click Save.
3. Create a campaign by adding the draft email and the segment that you created to the campaign canvas. See: Creating multi-step campaigns.
4. Add any other campaign elements you want segment members to flow through.
5. Configure and connect the elements on the canvas to form the campaign flow. See: Campaign canvas elements and Creating multi-step campaigns.
6. Click Save.

You’re now able to run your email marketing campaign to target your contacts in the construction industry with over 5000 employees.
Overview of Company Search

View and explore company information, insights, and conferences on the Company Search page. You can filter all companies by headcount, location, keywords, technographics, or create your own search. Use the Summary tab to view and filter the firmographic data from various segments.

Company Profile

You can search for specific companies on the Company Search page and click to view the company profile on the Overview page. You get all the details about the company, such as revenue, number of employees, and industry category information.

You can scroll down or click the tabs to view other information about the company:

- Signals: Get the latest news about the company.
- Job Postings: See if the company has any open job requisitions.
• Corporate Hierarchy: Know if the company has a parent or subsidiaries or has made any recent acquisitions.
• Keywords and Technographics: View the industry keywords and technologies that the company uses.
• Similar Companies: See if there are other companies like the company you’re reviewing.
• Funding History: Download the round-by-round funding information for a single company.

Filter Companies

Oracle DataFox has proprietary, mutually exclusive industry classifications to help with TAM expansion or screening a sector. You can filter companies that meet a set of criteria. There are several filters that you can apply such as industry categories, financial info, technographics, and signals.

1. Sign in to Oracle DataFox and go to the Companies page.
2. Click Add a Filter.
3. In the Filter Companies dialog box, click Industry Definition > Industry Categories.
4. Select the Information Technology category. You can also expand the list and select from the industry types available within a category. For example, Cloud Infrastructure and Telecommunications Software.

**Tip:** If you apply the same filters frequently, click Save Filters As Default. So, the next time you want to apply these filters, you can click Apply Default Filters rather than select the filters again. The default filter applies only to your account and not to the team.

5. Click Apply.
The Company Search page lists all the companies based on the filters you applied.

### How Filters Work

You can filter companies across various categories. How your filter works depends on whether you’re selecting filters across categories or within a category. If you apply filters across different categories, the filters apply the AND operator.

Let’s say you have applied the following filters:

- **Basic Company Info > Headcount**: enter 200 and 1000 in the minimum and maximum fields
- **Financial Info > Funding**: enter 65M in the minimum field

After the filters are applied, the Company Search page displays all the companies with employee headcount between 200 and 1000 and have raised over 65 million in funding.

However, if you’re selecting multiple values within a category, the filters apply the OR operator. For example, from the filter **Technologies > Technographics Category**, if you add the filters ERP and CRM, the Company page displays the companies that use either of these technographics.

### Customize and Reorder Fields

You can customize and reorder columns on the Company Search page. Here’s how.

1. Go to the Companies page.
2. Click the **Customize Fields** icon.
3. In the Inactive Fields section, click the **Enable this column** icon to move inactive fields to the Active Fields section. Similarly, in the Active Fields section, click the **Remove** icon to move fields to Inactive Fields section.
4. In the Active Fields section, drag and drop fields to reorder them.

**Note:** If you don’t find fields in Oracle DataFox, you can create custom fields. For details, see *Create Custom Fields and Populate by Bulk Upload*.

### Overview of Advanced Insights

Customers want to find and prioritize target accounts, but target account definitions are often anecdotal and/or too broad to encode into an actionable go-to-market strategy.

Finding and prioritizing target accounts is crucial for a variety of sales and marketing use cases, such as sales territory planning, building named account lists, Account-Based Marketing (ABM) campaigns, or field event planning.

#### What it Does

Data drives business decisions, but it’s not always easy to surface and interpret. Backed by data science analyzing thousands of attributes, advanced insights provide a deeper view into the most significant attributes of your best customers. This allows you to create a data-driven Ideal Customer Profile (ICP) to target the right companies and identify your Total Addressable Market (TAM):

- Use Advanced Insights to analyze your best customers for identifying attributes.
- Discover additional ICP criteria you may not have known to build out a robust, data-driven set of ICP criteria.
- Encode ICP criteria into Account Scoring to operationalize your targeting strategy.

See *Overview of Account Scoring* for details.

To begin exploring this feature, sign in to your Oracle DataFox instance, and select the Insights tab.

#### How the Data Science Works

Data science models surface attributes which are significantly more common than what expected to see among all companies in our database, based on how many standard deviations a feature is from the norm.
To get started with advanced insights, see **Advanced Insights** and **Example of Ideal Customer Profile Analysis**.

## Advanced Insights

Advanced Insights help analyze target accounts and uncover unique details about these companies to help Sales and Marketing teams confirm your Ideal Customer Profile (ICP), identify your Total Addressable Market (TAM), and find a faster path to revenue. These criteria can be incorporated into your Account Score or leveraged in Oracle DataFox searches.

To get started, sign in to your Oracle DataFox instance and navigate to the Insights tab.

Select **New Insights** and insert the title of the list you want to analyze. These can be private lists that you generate or public lists available on Oracle DataFox.

We recommend you curate a list that has good examples for what you’re analyzing. For example, if you’re analyzing for your ICP, find examples of good customers (like high revenue or retention) and not just any current customers (like a random sample or the most recent). We recommend including at least 100 companies in this list for statistical significance.

After you select a list, click **Run Report**. The process takes several minutes and an alert is generated when it’s done.

![Advanced Insights Report](image)

Click any of your processed lists. An Advanced Insights output is displayed that provides more details about the list and the companies associated with it.

The Advanced Insights tab analyzes these attributes:

- Headcount
- Total Funding
- Keywords
- Keyword Clusters
- Industry Categories
- Technographics
- Conferences
- Public Lists

This graph summarizes the following information:

- The graph for each category provides the top five criteria to consider. If you see fewer than five criteria, it’s because there aren’t five that are significant in this category.
• Each section allows you to expand additional details for further information such as the significance (Z-score), which measures the number of standard deviations from the norm, measuring the attribute’s significance to the list. For more information, see Z-Scores.

A quick way to think about this is the higher the Z-score, the more unique that criterion is when comparing your target list to the entire database. Criterion with high significance should be considered for your ICP as account scoring criteria.

• You can also select the visible box to see which companies from the initial list match that criteria as a pulse check on that criterion.

• Additionally, you have the option to download the Insights as a .csv file if your teams work with excel documents. This can be done for each criteria.

The significance scores are color-coded to highlight potential criteria that could be incorporated into your Account Score. Z-scores greater than or equal to five appear in green, so consider adding these as criteria. Significance scores less than five but greater than negative five appear in black as a neutral criteria. Significance scores less than or equal to negative five appears in red, so consider adding this as a negative Account Scoring criteria.
Advanced Insights provides the data to support your ICP analysis, gives a clear depiction of your TAM, and allows you to expedite growth. See *Example of Ideal Customer Profile Analysis* for an example.

**Z-Scores**

You can use the Z-score from your Insights report to understand the significance of an attribute in a list. The Z-score identifies how much an attribute in your list deviates from the norm across your entire database. Attributes with higher Z-scores are more likely to be good criteria for account scoring. This table lists what different ranges of Z-scores indicate.

<table>
<thead>
<tr>
<th><strong>Z-score</strong></th>
<th><strong>Description</strong></th>
<th><strong>Color Indicator</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Greater than or equal to 5</td>
<td>Good criteria for account scoring</td>
<td>Green background and white text</td>
</tr>
<tr>
<td>Between 0 and 5</td>
<td>Can be added as potential criteria</td>
<td>White background and green text</td>
</tr>
<tr>
<td>Between -5 and 0</td>
<td>Can be added as negative account scoring criteria</td>
<td>White background and red text</td>
</tr>
<tr>
<td>Less than or equal to - 5</td>
<td>Cannot be considered as potential criteria</td>
<td>Red background and white text</td>
</tr>
</tbody>
</table>

This screenshot shows an example of how different criteria is indicated.
If attributes are over or under represented in the sample of companies that you provide, you see a highly varied Z-score. In such cases, ignore the very high or very low Z-score.

### Example of Ideal Customer Profile Analysis

This topic helps you identify your Ideal Client Profile (ICP). This goal is achieved by generating a list of more than hundred target accounts and analyzing unique criteria among the companies on that list to find similar companies.

If you have questions about configuring Advanced Insights, see Advanced Insights.

To begin, navigate to the Advanced Insights tab and select your list of target companies.

After you access your list, you can review the categories to identify unique metrics among your target companies when compared to companies in the database. For example, to identify this example ICP, see Headcount, Total Funding, and Keyword Clusters.
Under **Headcount**, you can see the various forms of criteria and significance. A higher significance indicates a better criteria for targeting ideal clients. In this example, companies above 200 employees have strong Z-scores.

For **Funding**, let’s look at companies with funding rounds greater than $100M based on the Z-score.
And for Keyword Clusters, the high-value targets are companies in the Enterprise Software and Software as a Service (SaaS) industries.

Now that you have identified some ICP criteria, you can push this into Account Scoring using the results from your Advanced Insights to identify your TAM and target other prospects using *Account Scoring*.

To do so, add weights from the criteria you gained using Advanced Insights. Start by navigating to Account Scoring and then click *Add Criteria*.

For this example, use Headcount, Funding, and SaaS as the keyword. Select appropriate options when you select *Add Criteria*.

The criteria is displayed in the Account Scoring page when it’s established.
After the criteria is created, add appropriate weights.

Advanced Insights helps you nail your ICP and identify your TAM by leveraging statistical analysis across more than 3.4 million companies.

New Customer Account Prospects

Use Signals to Find Prospects

Use signal filters to prioritize companies that drive most value for your business. For example, you can run a search for companies with new partnerships in the past year or companies that received private funding.

Let’s say you’re interested in growing companies. You can filter by growth signals and choose from 40+ other signals, for example to identify companies who have just hired a key executive, won a major award, or opened a new office.

If you’re not sure which signals to prioritize, you can analyze the signal categories your current set of customers fall into. To do so, from any of your lists, click the Summary tab.

To use signals and find prospects:
1. Click Add a Filter on the Company Search page.
2. Click Signals.
3. Select or search relevant filters.
4. Click Apply.
You can also configure alerts for company signals from Oracle DataFox. For more information, see `Signal Alerts`.

## Configure Preferred Technographics

Technographic filters is a powerful, advanced-intelligence resource that allows you to expand and prioritize your total addressable market.

This article summarizes how to build a list of laser-focused technologies.

### Configure Technographics

1. To configure preferred Technographics, you must log in to Oracle DataFox as an administrator. Navigate to **Settings**.
2. Select **Technographics**.
3. In this tab, different **Technographic** clusters are shown. Each represents a group of technologies. Adding one saves this as a filter for future searching.

   For example, select the **Salesforce** cluster to add multiple Salesforce technologies. Additionally, you can search for specific technologies in the search bar.

4. You can apply these filters when you search for companies. Navigate to the Companies tab, and select **Add a Filter**.
5. Navigate to **Technographics**. Select the **Filter On Preferred Technographics** option to display only the companies with technographics. This shortlist is available for reps when set by the admin, keeping only relevant technologies in searches.

   Click **Apply** to save these filters.
6. You can create a **Dynamic List** to identify new companies that are using specific technologies.

This allows your team to view companies with technologies you care about. In the image below, the Google company profile shows some of the preferred Technographics we selected earlier.
**Note:** Salesforce users: This also integrates with Salesforce but requires at least 24 hours to update. When updated, you can view them in your iFrame.

## Identify New Target Companies

You can easily see when new companies meet your filtering criteria with the Date Added column. You need to access one of your Lists to do so. To edit the column, select the three dots, then **Customize Fields**. You can add **Date Added to List column** and move it to the Active Fields section by dragging and dropping the column into the appropriate order.

In this example, Date Added is already in the Active column.

Once the column is visible, you can click the drop-down in the column header to sort descending and see the most recent companies that match your targeting criteria.
Find and Prioritize Accounts With Industry NAICS Codes

Locate Accounts with NAICS Codes
You can now narrow down your accounts by industry using NAICS codes and descriptions. Oracle DataFox now includes NAICS primary and secondary codes for most companies in the United States.

For instance, you can search for manufacturing companies by filtering by NAICS for manufacturing. You can also search for companies with any NAICS code or no NAICS code.

Map NAICS Codes to Salesforce
You can also map NAICS codes to accounts, and if you’re a Salesforce user, you can map to accounts, leads, and contacts.

Note: This section uses Salesforce as an example.

Navigate to Salesforce > DataFox Settings:
If you don’t see the NAICS mappings in Salesforce, your group may need to install the updated Salesforce package.

If installed correctly, you can take advantage of NAICS specific features.

Overview of Account Prospecting

You can find rich host of prospecting tools to locate companies of your choice with Oracle DataFox. With the streamlined platform, you can quickly build lists for easy, actionable results.

Oracle DataFox offers a suite of services to help you prospect more efficiently:

Prospect by Territory

- Searching for Prospects with Advanced Filters
Powerful filter options allow you to search for ideal companies and conferences. These include options like location, headcount, revenue, and more.

**Prospect By List (e.g. Inc 5000, Chief MarTech, Award Lists)**
- *Using Public Lists to Save Time*

Find public curated lists for faster searching and Dynamic List creation.

**Prospect by Technographics**
- *Configure preferred technographics*

Find HG/Technographic filters for specific results.

**By Signal (new office, executive changes, product launches, traction outside of capital raises)**
- *Overview of Company Signals*

Company signals allow you to keep track with the latest news-related events for a company.

**How You Prospect by Territory or Sourcing Criteria using Filters**

Oracle DataFox allows you to find new, verified companies to prospect. The below video and walk-through show you how to save **Dynamic Lists** to get alerts on new companies meeting your search criteria.

Here's an overview of how to build a new company prospect list in DataFox:

**Building New Company Prospects**

You can build a robust pipeline with high-quality prospects by searching DataFox. This is based on criteria such as sector and headcount.

Additional filters include Location, Technographics, Funding, and many more data filters. These filters allow you to save time finding the right prospects as you focus on core selling activities.

**Location Filter Overview**

**Technographic Filter Overview**

You can receive new company alerts in your Oracle DataFox digest email, or see when companies meet your search criteria over time in using the **Date Added** column.

1. Sign in to DataFox and navigate to the Companies tab.
2. Click **Add a Filter**.
3. In the Filter Companies dialog box, select **Industry Definition > Industry Keywords**. Choose your filters based on your prospecting criteria.

Oracle DataFox filters include:
Industry Keywords: Search sectors like SaaS, cybersecurity, healthcare tech, and other technology sectors.

Location: Setup territories based on cities, mileage ranges, and zip codes.

Technographics: Filter results based on whether a company uses Hubspot, and more than 2,000 tech stack tools.

Headcount: Define your employee headcount range to focus on.

Funding and 30 others.

4. Optionally, you may exclude companies for improved criteria.

Industry Keywords
Industry keywords can be useful when running searches such as healthcare tech companies not in biotechnology or pharmaceuticals. You can also exclude keywords found in company descriptions by entering a keyword in the Exclude these keywords field.

Exclude Locations
Use the Basic Company Info > Location filter to search a state or country and exclude a certain city. For instance, you may want to see all companies in California that aren’t in San Francisco.

Exclude Investors
Use the Financial Info > Investors filter to filter investors for better results. For instance, you may want to search all cybersecurity firms where Sequoia Capital isn’t an investor.

Saving Your Results
From Company Search, you can save specific companies to a list or create a dynamic list. For details on lists and dynamic lists, see Overview.

How You Prospect Using Pre-Built Company Lists

Using Public Curated Lists
To search for your next great prospect, use DataFox lists to scan for ideal picks. Oracle DataFox has more than 10,000 pre-built lists available to all users.

Public Curated Lists
To help you find the most requested lists, click the Public Curated Lists tab of the Lists page to see our featured items. Click Add a Filter to sort by sector or search for a specific list:
All Public Awards, Sector and Accelerator Lists

Click the Company Lists tab to view all of the publicly available lists in Oracle DataFox. By default, a filter is added on this list to show you all the public lists published by members of your organization.

You can add additional filters to lists you’ve already created, or, the Public Curated lists. This helps you narrow down to certain prospects and build a beneficial list of conferences/companies. This also allows you to find specific names and conferences.

Copy Companies From a List to a New List

From the Conferences tab, select your conference of interest and then click the check box next to companies of interest. Click Add to List.

Clone a List to Modify to Your Preference

Click the Copy List option to clone a list.

Request a List

Click the Request a List button to create a list you can’t find.
You can submit list requests in any of the following formats:

- A file with a list of companies (CSV, Excel)
- A file or image with company logos (pdf, jpg, jpeg, png)
- A website with a list of companies

**Note:** Allow 24-48 hours for list requests to be processed.

How You Prospect using Technographic Search

Using the Technographic Search
You can search and prioritize prospects based on their installed technology platforms. With more than 14,000 searchable technologies, you can know which companies use Salesforce, Amazon Web Services, Optimizely, Mixpanel, Hubspot, and more.

Search Companies for 14,000+ Technology Standards
You can apply technology stack filters within a list or dynamic list when using Oracle DataFox. For details on lists, see Overview. Click **Add a Filter** and select **Technographics** from the model that appears.

You can search for companies using a specific technology or general tech category by scrolling through the presented filters.

We have included popular search values, but note that there are more than 14,000 technologies to search from.

Configure Your Preferred Technographic Values
As an account admin, you can determine the shortlist of Technographic values that appears in the new **Technographic** column for all users on their Oracle DataFox Account Team. This is a great way to eliminate irrelevant technologies and streamline searching for end users.

1. Sign in to Oracle DataFox and click your user name to locate Settings.
2. Click **Settings > Technographics** to edit your technographics configuration.
3. In the Technographic filter, select the **Configure Preferred Technographics** link. This allows you to select preferred Technographic stack filters from the Settings page.

Users on your team now have the option to filter all included **Technographic** values with one click.

4. Admins can always adjust their team’s Preferred Technographic configuration from the **Settings > Technographics** option. Click the **Clear All Technographics** link to remove all the configurations.

---

### Add Technographics to Improve Prospect Tracking

1. Like other filters in Oracle DataFox, you can setup a dynamic list using the **Technographic** filter. After adding one or more technologies to your search, click the **Create Dynamic List** button.

2. If you want to receive specific alerts about new companies using your dynamic list, you can adjust this in the **Signal Alerts** tab. Click the **bell** icon and specify the type of alerts you want to receive and how often.
You’re alerted by an e-mail when companies add new technologies you’re tracking, or when new companies with those technologies are added to the database.

Upon returning to the Dynamic List screen, a new column **Date Added** is displayed.

This indicates the date on which a company was added to your search. In this case, it indicates when a company has started using one of your configured technographic solutions. Sort this row in descending order to quickly view recently added companies.

With access to technographics search and filter, you can locate companies within your preferred spectrum of organizations.

**Use Mileage Radius to Include or Exclude Locations**

You can search and prioritize prospects based on city, state, country, and zip code. You can also apply mileage radius and include or exclude certain areas.

This can be useful when you’re searching for companies in metro areas like Atlanta, or want to search for companies in a state like California but want to exclude any company in Silicon Valley.

**Apply a Mileage Radius to Search Areas**

1. Navigate to the Companies tab and click **Add a Filter**.
2. In the Filter Companies dialog box, select **Basic Company Info > Location**.
3. Enter a city. For example, San Francisco.
4. From the **Include companies** list, select a mileage radius.
5. In the Metropolitan Hub section, you can also select a metropolitan hub or region.

**Exclude Areas from Your Search**

If your territory is defined by companies in a state but not in a certain city or area, you can search dynamically by excluding cities from your search.

For instance, if you're searching for California companies not located in Silicon Valley, you could add a state filter for California and a City filters for San Francisco and San Jose with a Mileage Radius of 30 miles. You may also exclude specific ZIP codes, cities, and names.
Know when New Prospects Enter Territory

1. Click the **bell** icon on your Lists tab to edit your Signal Alerts settings.
   
   **Note:** You can see this icon only when a saved search is already built.

2. Deselect all events except for General News and click **Save Alert Preferences** in the Signals Alert Preferences dialog box.
You can now receive alerts in your daily email letting you know when new companies enter your territory, or new companies in that territory are added to our database.
Existing Company Prospects

Prioritize and Track Companies

This topic is meant for Salesforce users only.

Advantages of Salesforce Priority Filters

Once your Salesforce Integration is configured, you have the ability to use the Salesforce Account and Salesforce Account Owner filters to track companies already existing in your Salesforce instance.

Integrate with Salesforce

- Salesforce Account: You can filter to see the accounts synced to a specific account, the accounts synced, and not synced to Salesforce. This is a quick way to split all accounts by existing or new.
Salesforce Account Owner: Sales reps can use Oracle DataFox to find companies where you’re the Salesforce Account Owner. You can then run powerful filters to narrow your list or use signals to take action on prospects.

**Use Salesforce Filters**

**Overview of Company Signals**

Advanced Searches: To do some advanced searches that leverage both Salesforce and Oracle DataFox data, your team can configure Salesforce-Oracle DataFox sync to pull in other account fields from Salesforce.

The Oracle DataFox admin can set up a sync of new fields. Then, you can filter on both Oracle DataFox data and Salesforce data from within Oracle DataFox.

**Set Up Additional Salesforce Account Fields to Search and Filter in Oracle DataFox**

This empowers you to run powerful searches such as: Find me all companies that are in my specified geography, in my desired headcount range (or any other Oracle DataFox field) AND that no one in my company has reached out to in the past month (from Salesforce synced data).

Now that you have all of your named accounts in a list, you can further filter it down. For example, you can:

- Find all accounts that are in a particular city you're traveling to;
- Find all of your accounts that have recently reached a specific milestone by viewing the Signals tab on your saved search. See **Signal Alerts**.
- Find all of the accounts that you haven't touched in the past 90 days.

By taking advantage of these Salesforce filters, you now have the ability to unlock powerful insight into your named accounts and run new, powerful searches using Oracle DataFox's flexible search and filtering technology.

These filters can be used within Lists and Searches, which are key to configuring Company Signals on selections of companies.

See:

- **Overview**
- **Signal Alerts**

Check out this article for more on how to use these and more filters to discover net-new companies:

*How You Prospect by Territory or Sourcing Criteria using Filters*

**Best Practices for Prioritizing Named Accounts in Oracle DataFox**

**Prioritize Named Accounts**

For sales reps operating in a Named Account environment, the challenge is determining which accounts are most valuable to prioritize today.

With a list of your accounts in Oracle DataFox, you can quickly prioritize by companies with the most recent funding, new products, and more than 30 company growth signals. This article covers different ways you can prioritize your named accounts within Oracle DataFox.
Before we proceed, see *Overview* for a brief summary of lists.

**Option 1: Filter any Lists of Companies in DataFox**

With a list of your accounts in DataFox, you can quickly prioritize by companies with the most recent funding, new products, and more than 30 company growth signals. To do so:

1. Find your saved lists on your Lists page.
2. Click the **Add a Filter** button. You can adjust filters as necessary to create your preferred prospects.

**Option 2: Import Your Accounts/Leads into DataFox as a List**

Export a list of accounts or leads from your CRM in .csv format and upload it for easy prioritization.

*Import Company Lists*

**Option 3: Use Salesforce Account Filters to Reveal Your Territory**

You can select the accounts in your name if your Salesforce integration is configured. Go to **CRM/Custom Data** > **Salesforce** > **Accounts**. From the **Show Me** list, select **Companies synced to a specific Account**.

**Prioritize with Filters**

With your named account territory visualized, apply filters that align with your sales process. In this example, let's filter all companies without a funding event in the past 18 months.
Your list has now been truncated to only show companies that fall into your category.

**Tip:** To export data on the companies in your territory, click the **Download to Spreadsheet** icon in your list. This provides options to download your custom columns or all columns: **Download and Extract Company Info to CSV**.

**Prioritize by Company Signals using the Signals Tab**

Find out about important signals made within your territory, now represented as a list in Oracle DataFox, by clicking the **Signals** tab.
1. Click the Add Filters button to whittle the feed down to only the company signals you care about.

   For more information, see Overview of Company Signals.

2. Select a company based on filters set to make signals that are meaningful to your sales cycle. You’re now presented with an aggregated list of company signals for that company.

   Tip: Everyone looks for funding events. Savvy users look for interesting events occurring around major landmarks to confirm indications of growth.

Signals are useful for identifying these events of growth. You can access this option by selecting an individual company profile.

Standouts can be added to your custom lists for potential prospecting.

Make sure you have configured your company signals to alert you of the next ideal time to reach out, or you can search for the right person to contact in the Contact Info tab.

By giving certain accounts priority, you can better act on specific information you deem important.

Signal Alerts

Overview of Other Lists Filter

Use Other Lists Filter

Even if you’re not configured with integration with your CRM application, you can still use Oracle DataFox filters to track companies that are valuable to you.

See Integrate with Salesforce to integrate with Salesforce.

See Integrate with Oracle CX Sales to integrate with Oracle CX Sales.
Using our CSV Importer Tool, you can pull lists of companies directly from your CRM and upload them into Oracle DataFox as Lists.

Import Company Lists

Overview

You can then use the Other Lists filter to track companies across different Lists. Here's how it's done.

Find the Other Lists Filter

On the Company Search page, select Add a Filter and click Lists.

Selecting Search

The Other Lists filter has settings, Include Companies and Exclude Companies:

1. Include Companies in a specific list. Best used when looking to isolate companies from a specific list.
2. Exclude companies from a specific List (or Lists) from your selection.

There are two other options to view companies:

• Show companies which are on at least one list. Best used when looking to view ALL companies already being tracked by people in your organization.
• Show companies which aren't on any lists. Best used when looking to remove ALL companies already being tracked by people in your organization:

Can't Find the Other Lists Column?

Click the Customize Fields icon to view the columns that aren't displayed. You can also organize the fields for better visibility. If you can't see Other Lists, it's in the Inactive Fields column.
Select the + or - icons to Add or Remove **Other Lists** from the Active or Inactive Fields. Once done, it’s displayed in your updated search table.

**Filter Executive Hires**

Oracle DataFox has enhanced its functionality with new filters to better allow companies to identify prospects or invest in them. One new addition is the Key Executive filter.

1. Sign in to Oracle DataFox and navigate to the Companies tab.
2. Select **Add a Filter** and navigate to **Executive Hire**.
3. Enter CFO in the **Executive Hire** field. You may also select a specific date to search for companies who hired a CFO to reach out at the opportune time.

   Based on the criteria input, you see a new round of results, as shown in this screenshot.
You can also try filtering for other positions. In this example, let’s filter for VP of Sales. Repeat the steps and enter VP of Sales.

Once again, you get a targeted list of results out of the 2 million companies listed in Oracle DataFox.

**Add Executive Hire Column**

1. You can also add the Executive Hire column after inputting your custom field. To do so, all you need to do is apply your filter with similar steps as above (input search and then date).

2. Click **Apply** to view the results.

Now, you can add the column to show up by selecting the **Customize Fields** icon.

3. In the Customize Fields dialog box, find and add the **Executive Hire** column to the Active Columns section.
Now, the field appears on the Companies page.

4. Select View.

The company profile appears and shows the actual article that caused the company to populate in the search.

Filter Job Postings

You can use filter for specific positions or skill sets within tens of thousands of job postings across millions of companies. Use this filter to receive specified alerts so that you can focus on:

- Companies with new job hires such as a sales ops manager
- Companies with job postings looking for specific skill sets like Machine Learning, or Python.

This filter is easy to use and let’s see how in this quick tutorial.

1. Sign in to your Oracle DataFox instance and select the Companies tab.
2. Click Add a Filter.
3. In the Filter Companies dialog box, click Signals > People > Job Postings.
4. In the Job Postings field, enter a position or skill set. In this example, let’s enter sales ops manager.
5. Click Add.

You can modify this by date as well, looking for hires on specific dates for ideal reach out times.

6. Click Apply.
After the filter is applied, you see the contained results out of Oracle DataFox’s list of over two million companies.

On the Company Search page, click the **Customize Fields** icon to add the Job Postings column to the page.

### Identify the Ideal Customer Profile

**Oracle DataFox Summaries**

Oracle DataFox allows you to group your best fit accounts together and identify common themes across them to pinpoint your ideal client profile.

The example shows you how to leverage the Salesforce integration to group your best fit accounts together and view common traits quickly.

If you’re not connected with Salesforce, you can still bundle your top accounts together in a manual list, then leverage the insights tab to identify your ICP. For more information, see **Overview**.

### Create a List of Companies in Salesforce

1. Sign in to your Oracle DataFox instance.
2. Click the Companies tab.
3. On the Companies page, click **Add a Filter**.
4. In the Filter Companies dialog box, click **CRM/Custom Data > Salesforce > Accounts**.
5. From the Salesforce Account list, select **Accounts synced to Salesforce**.
6. Click **Apply**.

You can now see all companies only synced to Salesforce. Since the Summary tab now shows companies specifically synced to Salesforce, you can better track your ideal client profile.

**Industry Keywords**

The total number of companies associated with each keyword. Select a keyword to create a search from the selection.

**Technographics**

The most common technographics found for relevant companies.
### Companies by Technographics

<table>
<thead>
<tr>
<th>Technographic</th>
<th>Employees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Viewport Meta</td>
<td>4,191</td>
</tr>
<tr>
<td>Google Analytics</td>
<td>3,613</td>
</tr>
<tr>
<td>Spf</td>
<td>3,571</td>
</tr>
<tr>
<td>Google Font Api</td>
<td>3,239</td>
</tr>
<tr>
<td>Google Universal Analytics</td>
<td>3,069</td>
</tr>
<tr>
<td>Wordpress</td>
<td>2,774</td>
</tr>
<tr>
<td>Wordpress Plugins</td>
<td>2,512</td>
</tr>
<tr>
<td>Rss</td>
<td>2,323</td>
</tr>
<tr>
<td>Max Width</td>
<td>2,251</td>
</tr>
<tr>
<td>Min Width</td>
<td>2,225</td>
</tr>
<tr>
<td>Font Awesome</td>
<td>2,133</td>
</tr>
<tr>
<td>Google Maps</td>
<td>2,076</td>
</tr>
<tr>
<td>Doubleclick.Net</td>
<td>2,035</td>
</tr>
<tr>
<td>Really Simple Discovery</td>
<td>1,920</td>
</tr>
<tr>
<td>Live Writer Support</td>
<td>1,863</td>
</tr>
</tbody>
</table>

Select All

**Number of Employees**

The total number of employees currently working at a company.
**Investors**

The total amount of investors for a company.
### Funding (USD)

The number of companies receiving USD-based funding.

<table>
<thead>
<tr>
<th>Company</th>
<th>USD</th>
</tr>
</thead>
<tbody>
<tr>
<td>500 Startups</td>
<td>1,351</td>
</tr>
<tr>
<td>Y Combinator</td>
<td>1,324</td>
</tr>
<tr>
<td>Intel Capital</td>
<td>835</td>
</tr>
<tr>
<td>Sequoia Capital</td>
<td>827</td>
</tr>
<tr>
<td>New Enterprise Associates</td>
<td>754</td>
</tr>
<tr>
<td>Start-Up Chile</td>
<td>718</td>
</tr>
<tr>
<td>Right Side Capital Management</td>
<td>684</td>
</tr>
<tr>
<td>SV Angel</td>
<td>680</td>
</tr>
<tr>
<td>Techstars</td>
<td>661</td>
</tr>
<tr>
<td>SOSV</td>
<td>657</td>
</tr>
<tr>
<td>Accel Partners</td>
<td>596</td>
</tr>
<tr>
<td>Plug and Play Tech Center</td>
<td>570</td>
</tr>
<tr>
<td>Crowdcube</td>
<td>517</td>
</tr>
<tr>
<td>Kleiner Perkins Caufield &amp; Byers</td>
<td>507</td>
</tr>
<tr>
<td>Wayra</td>
<td>496</td>
</tr>
</tbody>
</table>

Select All
Countries

Companies listed by country.
Selecting a location creates new search criteria.

**Signal Counts by Last Year**

Signal Counts related to companies for the previous year. Filters can be selected to create new search options.
Status

Company filters based on current status.
Companies by Status

- Private: 2,059,330
- Acquired: 51,716
- Closed Down: 26,698
- Subsidiary: 23,182
- Public: 22,035
- Product: 3,266

Select All
12 Account Scoring

Overview of Account Scoring

You can use account scoring to help your sales and marketing teams prioritize and target the right accounts. You define your ideal customer profile by selecting scoring criteria and assigning weights to them. You can choose your criteria from a broad range of signals and firmographic data. Each of your potential target companies is assigned a score by comparing with your ideal profile. You can also use the scores to divide accounts into tiers to help you assign top-ranking companies evenly across territories.

Oracle DataFox provides thousands of criteria types but you can also import your own data as custom fields to use it as criteria for account scoring. Assign weights to these criteria to determine the account score for a company.

This image illustrates the various example inputs from your company data that you can use as account scoring criteria.

Account Scoring Criteria Sets

You can create up to three criteria sets to use different account scoring models for your diverse customer profiles. You can assign a criteria set to each user as well as define a default criteria set. If you don’t assign a specific criteria set to a user, the default criteria set automatically applies to the user.

Here are some reasons why you might want to create multiple criteria sets:

- If you have sales and marketing teams with different ideal customer profiles
- If you’re targeting a number of distinct industries, markets, product lines, and so on
• If you want to test different criteria sets to see which one gets the best results

You can also compare the account scores for a company from different criteria sets. To do this, go to the Company Overview page and select a different criteria set from the list in the Account Score section. Selecting different criteria sets here doesn’t change the criteria set assigned to you.

Criteria Sets and Integrations

It’s important to understand how criteria sets work with your integrated applications. Your users have a criteria set assigned to them in Oracle DataFox. However, in the integrated application, they may see the account scores for a different criteria set.

Let’s look at how criteria sets work for different integrations.

Oracle CX Sales

Here’s how criteria sets work and how you can change the criteria set used for account scoring.

• If you use Oracle Cloud, the criteria set assigned to the account owner applies.

  Note: To know if you’re using Oracle Cloud, go to the Team Management page in Settings. If you see the Oracle Identity Cloud Service button, you know you’re signing in using Oracle Cloud.

  To change the criteria set used for account scoring, go to the Team Management page and assign a different criteria set to the account owner. See Assign Account Scoring Criteria Sets.

• If you sign in using your Oracle DataFox credentials, the criteria set assigned to the user who set up the connection with Oracle CX Sales applies.

  To change the criteria set used for account scoring, connect to DataFox using the credentials of the user who has the required criteria set assigned.

Oracle Eloqua

The criteria set assigned to the user who installed the DataFox for Eloqua app applies.

To change the criteria set used for account scoring, reauthenticate your DataFox connection using the credentials of the user who has the required criteria set assigned. Go to Settings > Apps in Oracle Eloqua and click the Reinstall icon to reauthenticate. For details, see Reinstall DataFox for Eloqua.

Salesforce

To change the criteria set used by the bulk sync, you need to identify the user who set up the sync. Then you can assign a different criteria set to that user.

Here’s how you can identify the user:

1. Go to Settings > Integrations > Salesforce.
2. On the DataFox for Salesforce page, click Auth Settings.
3. In the Sync Settings section, identify the user who set up the sync.
4. Go to the Team Management page and assign the required criteria set to the sync user. See Assign Account Scoring Criteria Sets.
Note: If you haven’t manually assigned a criteria set to the user who set up the sync, and you change the default criteria set, the default criteria set will also apply to the user who set up the sync.

If your users want to view the account scores for the criteria set assigned to them, they must sign in to Oracle DataFox and view the company overview. Clicking Refresh in the application widget on the company Overview page updates the account score to show scores for the criteria set assigned to them. However, during the next scheduled bulk sync, these scores are overwritten to show the scores that apply to the sync user.

Your users will also see different scores if they manually resync an account either from DataFox or from Salesforce. To avoid account scores from different criteria sets being passed on to Salesforce, ensure that your users don’t perform manual syncs.

Examples of Criteria Sets

By using multiple account scoring criteria sets, your salespeople can target the customer profiles that apply most to them. Let’s look at some examples where different criteria sets helps.

Geography

Your salespeople in Europe might have a different ideal customer profile than those in the US. In this case, you would build two criteria sets and assign them accordingly.

Industry

You sell to the high-tech industry as well as the health care industry. In this case, a single account scoring model may not apply to both industries and you create separate criteria sets. For example, the health care criteria set may focus on companies that participate in big health care conferences or technographics that are common to the health care industry.

Segments

Your salespeople may be focusing on either mid-market or enterprise companies. You may need different criteria sets for these two segments. The criteria set for enterprise may focus on public companies’ firmographics, whereas the one for mid-market may use the growth signals.

Build Your Ideal Customer Profile

First create a list of your most valuable sales accounts then run a report to analyze the distinctive attributes of this set of companies. For example, you can generate a list with your top 50 most-valuable sales accounts from the last quarter. After you generate a list, here’s how you can build your ideal customer profile.

1. Sign in to Oracle DataFox.
2. Go to the Insights tab.
3. Click New Insights.
4. In the Select a list to get Insights on dialog box, enter the name of your list with target companies.
5. Click Run Report. The report is generated in a few minutes.
6. Click the report to review the attributes of your ideal customer profile.

Ideal Customer Profile Insights

View the unique attributes identified from your target companies. For example, in this screenshot, headcount is identified as one of the unique attributes from your list of companies.

When comparing target list with all companies in Oracle DataFox, a metric is considered unique if the significance score (Z-score) is higher. Let's see what you can understand from the report.

- Based on the significance score, each insight is displayed graphically with different attributes. Z-score helps you understand the significance of an attribute to the list. You can hover over the graph bars to see the Z-score for each attribute.
- View the top attributes in the # companies column. You can click the Expand icon to view the companies that have this attribute.
- View the details of this attribute in the Details table.
  - The table contains all the attributes and their Z-scores.
  - The # companies in this list | in all DataFox column compares the number of companies in each attribute to the companies in database. For example, the highlighted text in the screenshot shows that out of 13,783 companies with more than 5000 employees, your list contains 20 of these companies.
  - Similarly, % companies in this list | in all DataFox column shows the data in percentage.

You can now go to the Account Scoring tab and set up criteria based on your ICP. For more significant results, consider insights with higher Z-scores for your ICP.

Set Up Account Scoring

You have identified your ideal customer profile and are now ready to set up account scoring.

This image illustrates the account scoring process.
Here’s a list of tasks to do to set up account scoring:

1. **Set Up Account Scoring Criteria**
2. **Preview and Iterate the Account Scoring criteria**
3. **Publish the Account Scoring Criteria**
4. **Set Up Account Scoring Tiers**
5. **Assign Account Scoring Criteria Sets**
6. **Integrate Scores into your Workflows and Sync with Applications**

### Set Up Account Scoring Criteria

You need to set up criteria for account scoring. Let’s look at some examples of filters you can use to set the account scoring criteria:

- A firmographic data point, such as headcount, location, or industry keywords.
- Signals data, such as growth signals, including office space expansion and new product launch.

**Note:** If you already have criteria set up, you can either remove the criteria or edit it. On the Manage Criteria page, click the **Remove all** icon to remove the existing criteria.

Here’s how you can set up the criteria.

1. Click the Account Scoring tab.
2. On the Manage Criteria page, select one of these options:
○ Use Account Scoring template: Select this option to modify a group of preselected criteria.
○ Build my own Account Scoring criteria: Select this option to add your own account scoring criteria. You can view the draft template as soon as you start building it.

This screenshot displays the options that you can use to set up the account scoring criteria.

3. Build your criteria on the account scoring template.
   ○ In the Criteria column, click the Edit icon to edit the filter.
   ○ On the Weight column, click Edit to edit the default weights. You can enter both positive and negative weights.
   ○ From the Weight list, select a weight for each criterion.
   ○ Click the Delete icon to delete a criterion.
   ○ Click Add Criteria to add more criteria.

Note: You can add up to a maximum of 250 criteria.

4. Optionally, click Create New Criteria Set to create a new account scoring criteria set. You can create up to three criteria sets including the default set. You can select a set as the default in Settings.
   a. Enter the name and description.
   b. Click Create.

5. Click Preview Scores to preview your account scores after you have finished adding criteria.

For each criteria set, build your criteria on the account scoring template and publish your account scores. You can view different criteria sets and modify your criteria sets by clicking Change Criteria Set on the Account Scoring page.

Preview and Iterate the Account Scoring Criteria

Preview your criteria with sample lists to check accuracy and iterate the criteria if required.

1. On the Account Scoring page, click the Preview Scores tab to review the account scores.
2. In the Choose sample companies section, click **Choose a sample group** to select up to two lists. For example, you can use a custom list of ideal companies to compare against a random group of companies from the database.

If you have already set up a sample earlier and want to change the sample, click **Change**.

3. In the Choose Sample Companies dialog box, enter a list name. If it’s the first time you’re choosing a sample company, you can click **Random Companies**.

4. Click **Done**.

5. In the Preview section, click **Preview Scores** to review the account scores for your sample groups.

You can preview the scores in a distribution chart and Company scores table.

For example, let’s compare a random set of companies from Oracle DataFox to the companies listed in one of your lists. The Y-axis represents the number of companies, while the X-axis represents the account score. For an ideal account scoring criteria, your ideal accounts should shift towards the right of the X-axis scoring higher.

This screenshot shows the score previews in a distribution chart with two sets of criteria.

The Company scores table also displays individual company matrix, as shown in this screenshot.
Here’s what to keep in mind when you’re reviewing the account score criteria:

- Ideal target companies should generally have higher scores. If known good target companies don’t have a high score, you should adjust the criteria and weights.
- A sample of random companies provides a mixed range of companies with high and low scores representing good and bad targets.
- If you’re iterating on an existing score, it’s best practice to take a screenshot of this matrix before you run the revised preview. You can then see how individual company scores alter based on the criteria you have added or updated.

### Iterate Your Account Scoring Criteria

After you preview your account scores, you can iterate the criteria and weights for a more fine-tuned result. You can iterate instantly without waiting for the account scores to be published for calculation. Here’s how.

1. From the Draft Criteria tab, click the Manage Criteria tab.
2. Add additional filter criteria or edit the existing criteria.
   a. Select **Add Criteria** to add additional filter criteria.
   b. Select a different weight from the **Weight** list to edit weights of the existing criteria.
3. Click **Preview Scores** to see how your changes affected the graph.

   The preview may take several minutes to be generated.

This screenshot shows the Company scores table with the previous and new scores.
Publish the Account Scoring Criteria

From the Manage Criteria tab, click **Publish**. The account scores are queued to publish, and the publish time varies based on the number of criteria. It usually takes up to 24 hours for the account scores to be published.

If you publish more than once, you can always review your current score while your new scores are being calculated. Go to the Companies tab and view the **Account Score** and **Account Scoring Tier** columns to review. If there’s an asterisk next to the account score for a company, it indicates that it’s the current score and that the score is being recalculated.

**Note:** If you haven’t already added the **Account Score** and **Account Scoring Tier** columns as filters on the Company page, click **Add a Filter** to add these columns.

Set Up Account Scoring Tiers

You can set up account scoring tiers to group companies into tier lists. Allot tier lists so that you can delegate work across your salespeople equally on all the high-valued accounts. You can identify tiers based on percentile (for example, 99th percentile = top 1% of companies) or the number of companies (for example, 500 companies in tier 1).

For example, if you have 10 salespeople and 1000 target accounts divided into two tiers, you can assign 50 accounts per person in each tier. So, you set tier 1 to include 500 accounts (10*50) and tier 2 to include the other 500 (10*50) accounts.

1. **On the Account Scoring page, click the Distribution & Tiers tab.**
2. **Click Manage Tiers.**
3. **In the Tier Management dialog box, select how to create tiers.**
   - **Use percentiles:** Specify a percentage rank for each tier.
   - **Specify number of companies per tier:** Specify number of companies for each tier.
You can create up to four tiers.

4. Select or enter a number for each tier.
5. Click Done.

Your tier definition is updated immediately.

You can also drag the tier lines on the graph to update the tier threshold.

This screenshot shows the graph with updated tier definition. You can view the companies within each tier by clicking any of the tiers from the Tier Details section of the graph.

Assign Account Scoring Criteria Sets

Assign the criteria set that’s most relevant to your sales reps to help them prospect better.

1. On the user menu, click Settings, and then click the Team Management tab.
2. On the Team Management page, click the Active Users tab.
3. For each user, select a set from the Criteria Set list.
Each user can view the scores and tier data based on the assigned criteria set.

**Note:** New users are assigned the default criteria set, but you can assign them a different set at any time.

The first criteria set you create is automatically the default set, but you can change the default. Go to **Settings > Account Scoring > Default Criteria Set** and select a set from the list.

**Integrate Scores into Your Workflows and Sync with Applications**

Let’s look at the different ways in which you can integrate your account scores.

- Integrate with APIs: Use Oracle DataFox APIs to include account data from Oracle DataFox into any workflow you want. For details, see [REST API for Oracle DataFox](#).

- Spreadsheet Exports: Export your account scores via spreadsheets and then import them into any of your other systems. For details, see [Download and Extract Company Info to CSV](#).

- Sync with your CRM Applications: Use filters and account scoring tiers to filter for Tier 1, new accounts that aren’t currently synced with your CRM application. Save the list as a dynamic list and every few weeks, sync the new companies to your CRM application.

  - Sync with your Oracle CX Sales application. For details, see [Sync and Enrich Your Account](#).
  - Sync with your Salesforce applications. For details, see [Sync Accounts from Oracle DataFox into Salesforce Instantly](#) and [Bulk Sync to Salesforce](#).

- Sync with Eloqua: Target email marketing campaigns to contacts in Eloqua based on account score. For details, see [Example of Using Oracle DataFox Data for a Marketing Campaign](#).

For strategies on account scoring, see [Best Practices for Account Scoring](#).

**Use Account Scoring to Find Your Best-Fit Accounts**
Here's how you can use account scoring to identify your best-fit accounts.

1. Click the Companies tab. If you don't see the Account Score and Account Scoring Tier columns on the Company Search page, click Customize fields icon to add the columns.
2. On the company search page, click Add a Filter.
3. In the Filter Companies dialog box, click Account Scoring.
4. In the Account Score field, enter the minimum and maximum score.

Optional, if you want to view companies in a tier, from the Account Scoring Tier list, select a tier.

5. Click Apply.
6. On the Companies page, click the Account Score column and select Sort Descending.

Your salespeople can now sort their accounts based on the company scores. The companies with high account scores are the best-fit accounts that salespeople can target.

Best Practices for Account Scoring

Let's see how you can use best practices to build criteria for your account score.

Learn the Basics

Learn how to create at least one of the key types of criteria-- a pre-built list, signals data, firmographic data, and more with the account scoring feature. For details, see Set Up Account Scoring.

To verify the accuracy of the weight of account scoring, here are two recommended methods:

- If you're using CX Sales or Salesforce, use Oracle DataFox filters to make a list of companies that are synced. Ensure your top prospects or accounts appear among the top companies based on your account score.
• If you’re using any other CRM application, you can filter based on account score and ensure your top prospects or accounts appear among the top companies.

Analyze and Reiterate
After you set up your criteria and publish your scores for the first time, analyze your scores and improve them. Assess a few more good traits to use in your criteria and put a negative weight on criteria you don’t like. Adapt and improve your scores based on your changing business strategies and the evolving trends of the markets you want to enter.

Iterate on your existing score after you have finalized your scoring criteria. It’s a great idea to make routine adjustments to track the companies and weights your organization finds most valuable.

Share and Update
After you have some preliminary results, share the account scoring criteria with your teams. Collect your team’s feedback and reiterate the criteria as necessary.

For example, choose one of the criteria to be companies with headcount more than 5000 employees. You want priority companies to appear at the top in the Companies tab when you sort the companies. If you receive feedback that your top companies aren’t appearing, then you need to adjust the weight criterion for increased accuracy.

Sync with Your Applications
After you’re sure you have an accurate score, push it to your CRM application and test the score. You can incorporate any feedback that you get from your teams to the scoring model. Sync with CX Sales and Salesforce applications. For details, see:

• Sync and Enrich Your Account
• Sync Accounts from Oracle DataFox into Salesforce Instantly
• Bulk Sync to Salesforce
• Use Account Scoring with Salesforce

You can also use account scoring data to target your best-fit contacts and run successful marketing campaigns. For details, see Example of Using Oracle DataFox Data for a Marketing Campaign.

Examples of Account Scoring
Here are a few examples to help you understand how to create your scoring criteria.

Example of Scoring Setup for Growth Investor

This table shows an example of criteria you can apply if you want to target the early stage venture-funded startups preferably in USA.
## Example of Scoring Setup for Sales and Marketing

<table>
<thead>
<tr>
<th>Score</th>
<th>Custom/Oracle DataFox</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>+30</td>
<td>Custom</td>
<td>Spreadsheet: Tier 1 prospects</td>
</tr>
<tr>
<td>+20</td>
<td>Oracle DataFox</td>
<td>Curated List: SaaS 1000 - Headcount growth</td>
</tr>
<tr>
<td>+20</td>
<td>Oracle DataFox</td>
<td>Curated List: Inc 5000 2020</td>
</tr>
<tr>
<td>+20</td>
<td>Custom</td>
<td>Spreadsheet: Old Pipeline from spreadsheet</td>
</tr>
<tr>
<td>+15</td>
<td>Oracle DataFox</td>
<td>Firmographics: US-based, Headcount 50 - 150</td>
</tr>
<tr>
<td>+15</td>
<td>Oracle DataFox</td>
<td>People: Leadership Change</td>
</tr>
<tr>
<td>+15</td>
<td>Oracle DataFox</td>
<td>Growth: Office Expansion</td>
</tr>
<tr>
<td>+10</td>
<td>Oracle DataFox</td>
<td>Curated List: CyberSecurity 500</td>
</tr>
<tr>
<td>+10</td>
<td>Oracle DataFox</td>
<td>Conferences: Slush 2019</td>
</tr>
<tr>
<td>+10</td>
<td>Oracle DataFox</td>
<td>Conferences: Saastr 2020</td>
</tr>
<tr>
<td>+15</td>
<td>Oracle DataFox</td>
<td>People: Leadership Change</td>
</tr>
<tr>
<td>+15</td>
<td>Oracle DataFox</td>
<td>Growth: Office Expansion</td>
</tr>
<tr>
<td>+10</td>
<td>Oracle DataFox</td>
<td>Curated List: CyberSecurity 500</td>
</tr>
<tr>
<td>+10</td>
<td>Oracle DataFox</td>
<td>Conferences: Slush 2019</td>
</tr>
<tr>
<td>+10</td>
<td>Oracle DataFox</td>
<td>Conferences: Saastr 2020</td>
</tr>
<tr>
<td>+10</td>
<td>Oracle DataFox</td>
<td>Financial Info: Investors: Sequoia &amp; Accel</td>
</tr>
<tr>
<td>+10</td>
<td>Oracle DataFox</td>
<td>Financial Info: Investors: Oracle or Microsoft</td>
</tr>
<tr>
<td>+5</td>
<td>Oracle DataFox</td>
<td>Financial Info: Funding: Series A or B, &lt; 500</td>
</tr>
<tr>
<td>+5</td>
<td>Oracle DataFox</td>
<td>Industry Definition: Industry Keywords: SaaS</td>
</tr>
<tr>
<td>+5</td>
<td>Oracle DataFox</td>
<td>Investors: Y Combinator or StartX</td>
</tr>
<tr>
<td>-20</td>
<td>Oracle DataFox</td>
<td>Industry Definition: Industry Keywords: Consumer, Social</td>
</tr>
<tr>
<td>-40</td>
<td>Oracle DataFox</td>
<td>Basic Company Info: Founded: Before 2000</td>
</tr>
<tr>
<td>-60</td>
<td>Oracle DataFox</td>
<td>Industry Definition: Industry Keywords: Biotechnology, Healthcare</td>
</tr>
<tr>
<td>-100</td>
<td>Oracle DataFox</td>
<td>Financial Info: Exit Status: Public or Acquired or Closed Down</td>
</tr>
<tr>
<td>Weight</td>
<td>Criteria</td>
<td></td>
</tr>
<tr>
<td>--------</td>
<td>----------</td>
<td></td>
</tr>
<tr>
<td>+25</td>
<td>Curated List: Sales Intelligence Software - G2 Crowd</td>
<td></td>
</tr>
<tr>
<td>+25</td>
<td>Basic Company Info: City San Francisco, CA, Headcount &gt; 20</td>
<td></td>
</tr>
<tr>
<td>+25</td>
<td>Curated List: Top SaaS Companies - SaaS 1000</td>
<td></td>
</tr>
<tr>
<td>+25</td>
<td>CRM/Custom Data: Accounts synced to Oracle CX Sales</td>
<td></td>
</tr>
<tr>
<td>+20</td>
<td>Curated List: Inside Sales - Sales Intelligence - Company Intelligence</td>
<td></td>
</tr>
</tbody>
</table>
| +20    | Basic Company Info: Headcount 200 - 1k  
|        | Financial Info: Mid-market revenue |
| +15    | Conferences: Oracle OpenWorld 2018 |
| +15    | Industry Definition: Industry Keywords: Sales Intelligence, Data |
| +10    | Conferences: Topo Summit 2019 |
| +10    | Signals: Negative News: Bankruptcy within the last year > 1 |
| +10    | Industry Definition: Industry Keywords: SaaS or enterprise software |
| +10    | Curated List: Marketing Account Intelligence Software - G2 Crowd |
| +10    | Conferences: SaaStr Annual 2019 |
| +10    | Curated List: Inside Sales - Sales Intelligence |
| +5     | Basic Company Info: Headcount > 1k |
| +5     | Curated List: Sales Intelligence |
| +5     | Curated List: Product Hunt - CRM Must-Haves |
| +5     | Industry Definition: Industry Keywords: b2b |
| -5     | Industry Definition: Industry Keywords: infrastructure |
| -5     | Basic Company Info: Headcount > 20k |
| -20    | Basic Company Info: Exclude United States, Headcount > 100,  
|        | Financial Info: Revenue > $1, Funding > $5m |
| -25    | Signals: Negative News: Industry or Competitive within the last year > 1 |
| -50    | Small Startup Direct Competitors, Too Close for Comfort |
This screenshot displays how we set up example criteria for sales and marketing.
13 Signals and Alerts

Overview of Company Signals

Signals work like a newsfeed of key milestones of a company. You can get daily updates of significant changes to companies that matter to you, such as awards, key personnel changes, events they’re attending, and growth indicators. Then you can use this information to target the right companies at the right time, enrich interaction, and send personalized messages.

You can set up alerts to receive signals. For details, see *Signal Alerts*.

Signal Types

This table lists different signal types, tags, and their descriptions. Use the API tags to show specific signal types when you’re setting up smart talking points in Oracle CX Sales. For details on how to set up smart talking points in Oracle CX Sales, see *Enable Smart Talking Points in Oracle CX Sales*.

<table>
<thead>
<tr>
<th>Signal Category</th>
<th>Signal Type</th>
<th>API Tag</th>
<th>What Triggers This Signal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Growth</td>
<td>Partnership or Joint Venture</td>
<td>partnership, joint-venture</td>
<td>Two companies partner or enter a short-term business arrangement</td>
</tr>
<tr>
<td></td>
<td>Sales or User Growth</td>
<td>sales-growth, user-growth, market-share-growth</td>
<td>The average sales or user volume for a company increases</td>
</tr>
<tr>
<td></td>
<td>New Geography</td>
<td>new-geography</td>
<td>Company moves or expands into a new location such as state or country</td>
</tr>
<tr>
<td></td>
<td>New Products, Initiatives, or Strategy</td>
<td>new-product, new-initiative, new-strategy, product-launch</td>
<td>Company unveils a new product or announces an initiative to enter a market</td>
</tr>
<tr>
<td></td>
<td>New Patent or Regulatory Approval</td>
<td>new-patent, regulatory</td>
<td>Company receives government approval for a patent, registration, or license</td>
</tr>
<tr>
<td></td>
<td>Office Space Expansion</td>
<td>office-space-expansion</td>
<td>Company opens a new office</td>
</tr>
<tr>
<td></td>
<td>Won a Major Customer</td>
<td>customer-win</td>
<td>Company announces they have landed a principal customer</td>
</tr>
<tr>
<td>Financial</td>
<td>Earnings, Revenue, Stock Performance, or Dividends</td>
<td>earnings, revenue, stock-performance, analyst-expectations, valuation, dividends</td>
<td>Company releases numbers on their performance</td>
</tr>
<tr>
<td></td>
<td>Made an Acquisition</td>
<td>acquisition-acquirer</td>
<td>A company acquires another company</td>
</tr>
<tr>
<td></td>
<td>Debt Financing</td>
<td>debt-financing</td>
<td>Company receives a loan they have promised to repay</td>
</tr>
<tr>
<td></td>
<td>SEC and Regulatory Filings</td>
<td>form-5500, form-10k, form-d</td>
<td>Company files required legal paperwork</td>
</tr>
<tr>
<td></td>
<td>Invested in a Company</td>
<td>investment</td>
<td>A company invests in another company</td>
</tr>
<tr>
<td></td>
<td>IPO or Public Offering</td>
<td>ipo-trading, ipo-s1, ipo-speculation</td>
<td>A company invests in IPO or file to IPO</td>
</tr>
<tr>
<td>Signal Category</td>
<td>Signal Type</td>
<td>API Tag</td>
<td>What Triggers This Signal</td>
</tr>
<tr>
<td>----------------</td>
<td>-------------</td>
<td>---------</td>
<td>---------------------------</td>
</tr>
<tr>
<td>People</td>
<td>Merger, Restructuring, or Ownership Change</td>
<td>merger, restructuring, ownership-change</td>
<td>Company undergoes financial restructuring</td>
</tr>
<tr>
<td></td>
<td>Received Private Funding</td>
<td>private-funding</td>
<td>Company raises money in exchange for equity</td>
</tr>
<tr>
<td></td>
<td>Was Acquired</td>
<td>acquisition-acquiree</td>
<td>A company is acquired</td>
</tr>
<tr>
<td></td>
<td>Executive Quote or Publication</td>
<td>executive-quote, executive-publication</td>
<td>Company's executive has given a quote or has published an article</td>
</tr>
<tr>
<td></td>
<td>Headcount Growth</td>
<td>headcount-growth</td>
<td>Company reports headcount growth</td>
</tr>
<tr>
<td></td>
<td>Job Postings (this would be quite noisy)</td>
<td>job-posting</td>
<td>Company posts new available positions</td>
</tr>
<tr>
<td></td>
<td>Leadership Change</td>
<td>leadership-change</td>
<td>Company undergoes management restructuring</td>
</tr>
<tr>
<td>Awards &amp; Recognitions</td>
<td>Award Received</td>
<td>award</td>
<td>Company receives an award</td>
</tr>
<tr>
<td></td>
<td>Included in Industry News</td>
<td>industry-news</td>
<td>Company is mentioned positively by an industry analyst</td>
</tr>
<tr>
<td></td>
<td>Included in Industry Lists (INC 5,000)</td>
<td>industry-list</td>
<td>Company is added to an industry-specific list</td>
</tr>
<tr>
<td>Events &amp; Marketing</td>
<td>Accelerator or Incubator Participation</td>
<td>accelerator-participation, marketing-activity</td>
<td>Company participates in a program to make them grow faster</td>
</tr>
<tr>
<td></td>
<td>Exhibitor or Presenter at an Event</td>
<td>conference-exhibitor, conference-presenter</td>
<td>Company exhibits or presents at an event</td>
</tr>
<tr>
<td></td>
<td>Conference or Event Sponsorship</td>
<td>conference-sponsorship</td>
<td>Company sponsors a conference or an event</td>
</tr>
<tr>
<td></td>
<td>Conference or Event Attendee</td>
<td>conference-attendee</td>
<td>Company attends a conference or an event</td>
</tr>
<tr>
<td></td>
<td>Marketing Activity</td>
<td>marketing-activity</td>
<td>Company launches fresh marketing efforts or tactics</td>
</tr>
<tr>
<td></td>
<td>Video Presentation, Podcast, or Demo</td>
<td>video-presentation, podcast</td>
<td>Company plans a demo of their product capabilities</td>
</tr>
<tr>
<td>Corporate Updates</td>
<td>Purchased or Became a Customer</td>
<td>corporate-purchase</td>
<td>Company purchases a product or subscribes to a service</td>
</tr>
<tr>
<td></td>
<td>Outsourcing</td>
<td>outsourcing</td>
<td>Company subcontracts to other companies or contractors</td>
</tr>
<tr>
<td></td>
<td>Real Estate Sale or Relocation</td>
<td>real-estate-sale, relocation</td>
<td>Company sells their office or moves to a new location</td>
</tr>
<tr>
<td></td>
<td>Reorganization or Name Change</td>
<td>reorganization, name-change</td>
<td>Company alters the corporate structure or changes their name</td>
</tr>
<tr>
<td>Negative News</td>
<td>Bankruptcy</td>
<td>bankruptcy</td>
<td>Company files for bankruptcy</td>
</tr>
<tr>
<td></td>
<td>Industry or Competitive</td>
<td>industry-challenge, competitive-challenge</td>
<td>Company's competitors gain a unique advantage or the market downturns</td>
</tr>
<tr>
<td></td>
<td>Customer Dissatisfaction</td>
<td>customer-dissatisfaction</td>
<td>Company's customers voice their dissatisfaction online</td>
</tr>
<tr>
<td></td>
<td>Financial Challenges</td>
<td>financial-challenge</td>
<td>Company reports signs of financial instability</td>
</tr>
<tr>
<td></td>
<td>Executive or Key Person Departure</td>
<td>key-departure</td>
<td>Company loses or fires an executive</td>
</tr>
</tbody>
</table>
### Signal Alerts

You can configure alerts to receive company signals from Oracle DataFox in your inbox or on Slack.

With alerts, you can act on time-sensitive information and reach out to your valuable prospects. Let's look at an example. You're a sales rep and in the daily email digest that you receive, you learn about an acquisition made by your top prospect. You use this information along with other account intelligence to draft a timely and relevant email to your prospect’s Sales VP. By monitoring a feed of your top prospects, you can have insider knowledge for ways to reach out to them.

#### Set Up Alerts for Company Signals

To set up alerts on company signals and edit the news alerts you receive from companies, you must use a static or a dynamic list.

It’s simple to manage signal alerts on a list or a dynamic list. You can set up alerts in the Signal Alert Preferences dialog box from the Lists page, from a specific list, or from the Manage Alerts page.

1. Open the Signal Alert Preferences dialog box in one of these ways:
   a. On the Lists page, click the Get Alerts icon in the Actions column.
   b. After you open a list, click the Get Alerts icon.
   c. From the user menu, click Alerts. On the Manage Alerts page, click the Check Mark icon against a list from the Static Lists or Dynamic Lists tab.

2. In the Signal Alert Preferences dialog box, in the Send Alerts Via list, select how you want to receive your alerts.
   If you want to receive alerts on Slack, see **Integrate Slack with Oracle DataFox**.

3. Select the types of alerts you want to receive and click Save Alert Preferences.

Now you start receiving the alerts you selected for the companies in your list. When a new company is added to an existing list, you will start receiving alerts for that company automatically.

**Note:** You can set up email or slack alerts on your lists and receive one email for multiple lists and instant slack messages.

To stop receiving alerts, click the Get Alerts icon and select **Delete This Alert**.
Filter Signal Types on Your List

You can filter signal types for the companies on your list to see the news signals you’re interested in. For example, here’s how you can see news signals for the companies in your list that have announced sales or user growth.

1. On the Lists page, select a static list.
2. Click the Signals tab.
3. Click Add a Filter.
4. Click Turn All Signals Filters Off to turn off any existing signals.
5. Select Growth > Sales or User Growth.
6. Click Apply.

For a dynamic list, click the Get Alerts icon on the Lists page to set filter preferences for the companies in your list.

See also:
- How You Prospect by Territory or Sourcing Criteria using Filters
14 Conference Intelligence

Overview

Discover the best conferences and get data feeds specific to conferences. Use conference intelligence to determine the best conferences to attend and create a target prospecting list.

Hundreds of your target companies attend conferences each year. Leverage conference intelligence to find them. By doing so, you can generate network leads and new business. See Find Conferences Your Prospects Attend.

Search 3,000+ conferences by keyword, location, date, and most importantly, the number of your current prospects who are likely to attend each event. Make the most of your conference budget by prioritizing the events with the largest potential for you.

See: Use Conference Attendees List to Prospect.

How You Prioritize Conferences

This topic is meant for Salesforce users only.

Oracle DataFox helps make event management easier with its Conferences function, allowing you to prioritize conferences with valuable attendance.

To get started, log in to your Oracle DataFox instance and navigate to the Conferences tab.

The Salesforce filter in the conferences tab is to prioritize conferences for companies in your Salesforce (CRM). Salesforce is a tool that allows sales teams identify who owns which accounts. The Salesforce filter shows you which conferences to attend based on companies you’re tracking.

In the conferences tab, you’re able to sort descending by companies in your Salesforce instance.

Let’s look at the percentage of companies attending a conference that’s in your Salesforce instance to show prospect-dense trade events.

Since you have quick access to high Return on Investment conference, you can plan more effectively.

With this instantly observable data, you now have access to clear insight about what grants most value to an event coordinator and marketing team.
Identify Conferences to Attend

This topic is meant for Salesforce users only.

Public conferences are a great way for sales and marketing teams to reach out to potential leads. Oracle DataFox helps you find the prospect dense conferences to initiate these conversations.

1. Sign in to your Oracle DataFox instance.
2. Navigate to the Companies tab and select **Add a Filter**.
3. In the Filter dialog box, select **Salesforce**.
4. Select one of your account owners who can identify important conferences. For example, select **Brian** and click **Apply**.

After the Salesforce Account Owner filter is applied, the Conferences tab highlights the conferences that are most important to that account owner. This is a great way for reps to focus on events and meetings crucial to them.

Reps can also see the number of companies they’re interested in attending each conference, allowing them to plan effectively.

They can also add filters to the conferences themselves. So, for example, if your reps want to reach out to companies in your CRM, you can apply filters to do so.

To apply filters to conferences:

1. Select a conference of interest.
2. On the Conference page, you can add a filter.
3. In the Filter dialog box, navigate to the Salesforce object and select accounts only synced to Salesforce. Of course, you can apply filters relevant to your sales team.
4. A new list appears, guided by the filter. With the filter applied, your sales team knows who to reach out to. This is an effective way to prioritize high ROI conferences to book more meetings and close more deals.

Find Conferences Your Prospects Attend

This topic is meant for Salesforce users only.

Locate Conferences for your Prospects

You can find which conferences your target accounts are attending using the Conferences page. This page includes two columns indicating how many of your target accounts are attending that conference. You must create a filter for the results to show.

- Prospects you’re Following: The number of companies in your Oracle DataFox Lists and Dynamic Lists.
- Accounts Synced with Salesforce: The number of companies synced to your Salesforce.

See:

- Overview
- How You Prospect by Territory or Sourcing Criteria using Filters
• **Integrate with Salesforce**

As this image shows, you can use filters to include and exclude companies from a specific list.

With these columns, you can identify which upcoming conferences are most valuable to attend.

**Look for Conferences in a Specific Sector, Location, or Date Range**

Oracle DataFox aggregates data on thousands of conferences and makes it easy to filter them based on the following criteria:

- **Conference Name**: Search the conference directory to find a specific conference. If you’re unable to find it, send a request to Oracle Support to build the conference list.
  
  **Location**: Filter by Country or by State to participate in local events or have a specific geography.

- **Date**: Include conferences by date range. By default, Oracle DataFox only shows future events. But you can include past events by expanding the date range.

- **Company Participant**: Filter by company name to see all conferences a specific company is attending or sponsoring.


See: *Sending Conference Requests.*
Look for Conferences a Specific Company is Attending
You can also see upcoming conferences a company participates in on its profile page using the Signals feed.
You can use the conference listing.

Know which Conferences your Prospects are Attending
You can use Oracle DataFox Company Signals to learn which conferences a company or set of companies are attending. See: DataFox Company Signals Overview.

1. To see a feed of which conferences your prospects are attending, go to the Signals tab in any List or Dynamic List.
   By default, Event and Marketing are part of several filters for conference location. You can add or remove filters for more accurate results.
2. To receive alerts for new conferences your prospects are attending, you can click the bell icon in any List or Dynamic List.
   You can then filter for Events & Marketing signals to send the alert to your daily email briefing or Slack channel. See: Configuring Alerts for Company Signals.

Request a Conference List
You can always request a new conference if it's not currently available.

Next, learn about the second major aspect of Conference Explorer: Use Conference Attendees List to Prospect.

Use Conference Attendees List to Prospect

Find Target Accounts
Now that you know which conferences you should go to (based on your existing target accounts attending), you can also find new prospects attending the conference. See Find Conferences My Prospects Are Attending

Once you've found your target conferences, you find that each conference has its own conference profile page. This page includes the conference description, location, and dates.

We even break down conference attendees by participation; and identify companies by participation categories, such as:

- Exhibitors
- Media
- Partners
- Sponsors
- Speakers

The conference list is like any other Public List in Oracle DataFox. You can view all the companies, and add them to other lists. But you cannot add or delete companies from these lists.
**Note:** Click **Copy List** under your settings to create a private copy of the conference list.

Once within your Conference List of interest, you can leverage the Salesforce and Other Lists columns. For more information on how to leverage the Salesforce columns, see *Prioritize and Track Companies*.

For information on how to leverage Other Lists columns, see *Overview of Other Lists Filter*.

- Highlight companies you’re already tracking by selecting the **Alert** icon or **Add all to List**.

- Or, hide those companies so you’re presented with only those that are net-new.

**Find Contacts of Conference Attendees**

Having contact information for individual companies can be an invaluable prospecting resource. You can target specific organizations and reach out to them.

You can find emails and phone numbers for key contacts at companies attending a conference. This option appears in your **Customize Fields** tab.
After you customize the fields, the email and phone number of your contacts of interest appears as organized by your Customize Fields window.

You can also track conferences.

Within your Conference of choice, click **Add All to List** or **Add to List** if you only want to select from specific participant types (like Partners, Exhibitors, Sponsors, and so on).

Now that your List is saved, you can access it by adding it to one of your existing lists (or you can create your own).

Or, by clicking the My Lists tab on your Lists page.

**Note:** Salesforce users: With your Conference List now saved, you can filter, export, or push Contact info to Salesforce as you would from any other Oracle DataFox List. For more information, see: *Sync and Enrich Your Accounts*

Custom Requests
Follow and Star Conferences

You can follow and star conferences to save you time and stay organized while preparing for events.

Star Conferences
To star a conference, click the Star icon either on the Conferences page or on the details page of that conference.

Access Starred Conferences
After you star conferences, you can quickly access it from the My Starred Conferences tab on the Conferences page.

Create Alerts for Conferences
Click the conference of interest and click the Get Alerts icon to setup email alerts for new companies participating in an event.

With these new features, you can keep closer tabs on the latest updates for conferences of interest.

Suggest Edits for Conferences
Click the conference of interest and click the Suggest edits icon to suggest any corrections or updates to the conference information.

Request Conference Information

If you would like to create or request a conference that’s currently unavailable, you can contact us to do so. Simply select the Conferences tab and click the Request a New Conference button.

Note: You can request up to a total of five conferences and manual list imports in a month. For example, consider you have requested for one conference and one manual list import in a month. You can then only request a total of three conferences and manual list imports for the rest of the month.

In the Submit Ticket form, enter the conference details and click Submit.
Oracle Support sends an email after your conference list is ready. Turnaround time for conferences is typically 1-3 days depending on the size of the conference.

Download Conferences

Download Conferences allows users to customize their conference analysis by downloading conference titles, dates, locations, sectors, number of companies attending, and more. The downloaded CSV file is great for teams who focus heavily on conferences and want the ability to run their own analysis.

Let's see how we can download conferences.

**Download Conferences**

1. Navigate to the Conferences tab in your Oracle DataFox instance.
2. Select the Download icon to download the first thousand conferences. When you do so, a .csv file with a list of conference information is downloaded.
Filter Conferences
If you want to increase the accuracy and hone in on specific Conference results, you can add filters.

1. Select **Add a Filter** under the Conferences tab.
2. Apply desired filters in the dialog box. Now, you can download this specific list as a CSV for fine-tuned, actionable results.

For details about the filter feature, see *Find Conferences Your Prospects Attend*. 
15 Inbound Marketing Intelligence

Overview

This chapter is meant for Salesforce users only.

As account-based strategies grow in prominence, B2B sales and marketing teams are tasked with balancing lead-based inbound flow with account-based marketing (ABM) strategies. This contributes to misalignment of pipeline prioritization and reporting criteria, ultimately contributing to friction between sales and marketing teams.

Misalignment occurs because CRM leads are isolated from accounts. This is difficult because of a technical gap in the way CRM systems are generally structured. CRM leads are typically not associated with a company until they’re manually qualified. Company-level information, if it does exist, may be isolated on other leads or on a CRM account.

What Inbound IQ Does

Inbound IQ solves these challenges by connecting lead and account-based strategies, allowing them to complement one another.

It empowers teams to bypass existing CRM gaps between leads and accounts and leverage Oracle DataFox’s robust account insights at every stage in the funnel.

The account score is usable as a point of alignment for the account and lead-based programs, ensuring all go-to-market efforts are focused on prospects having the highest likelihood of becoming long-term, high-value customers.
How It Works

- **Company Data for Leads** appends new or existing leads with robust company data from Oracle DataFox's company intelligence platform to enable data-driven lead routing and campaign segmentation.

- **Lead-to-Company Matching** connects leads to Oracle DataFox Companies, helping surface new target companies that should be qualified into Salesforce as accounts.

- **Company Scoring Criteria on CRM Lead iFrame in Salesforce** eliminates pre-call research and drives informed Sales Development Rep (SDR) engagement by displaying Company Signals on CRM leads.

- **Push List Names to Salesforce** for ABM campaign coordination.

Use Cases

- **Marketing Qualified Lead with Account Score** improves quality of Marketing Qualified Lead (MQL) by combining engagement scores from marketing automation platforms with Oracle DataFox Account Scoring, which includes both Oracle DataFox company and CRM account data. Leads are enriched with this score, along with robust company data, to screen MQLs based on Ideal Client Profile (ICP), improving MQL quality and conversion rates.

- **Measure Lead Quality by Account Score** uses account scoring on leads to measure the company fit value of various campaigns.

- **Account-Based Marketing Execution Alignment** uses account scoring as a universal measurement to send best-fit companies to ABM execution campaigns.

Company Data for Leads

Company Data for Leads appends new or existing leads with robust company data from Oracle DataFox's company intelligence platform to enable data-driven lead routing and campaign segmentation.
It automatically matches new or existing leads to Oracle DataFox Companies and appends those leads with company data and an account score.

**Note:** For Salesforce, see *Salesforce Account and Lead Matching Logic* for details.

Company Data for Leads allows you to:

- Know what companies your leads work for
- Reduce number of fields on your forms
- Increase form submission rates

While reducing form field count, it still provides data points needed for the following:

- Lead routing
- Territory management
Lead to Company Matching

Lead-to-company matching connects leads to Oracle DataFox companies, helping surface new target companies qualifying as Salesforce accounts.

If leads aren't qualified, they remain siloed in the lead bin, causing the loss of historical lead-level engagement in your old campaign-level data.

With leads mapped to companies, you can surface them from where you have had lots of leads. You can build lists of companies whose employees have shown interest and then add them to your CRM as accounts.

Company Scoring Criteria on CRM Lead IFrame in Salesforce

The company scoring criteria on CRM leads in Salesforce displays company signals on leads. Your Sales Development Reps (SDRs) can use this information to engage with customers and save time spent on pre-call research.
Display Account Scoring criteria (company fit criteria and growth signals) on the lead object (iFrame) to enable SDRs to have informed conversations with prospects.

Help make it efficient for your inbound sales reps to get context on leads and ensure you’re following up with them.

Examples of Inbound Marketing

This section provides examples of how you can benefit from inbound marketing using account scoring.

Marketing Qualified Lead with Account Score

Qualifying leads with account scoring improve quality of marketing qualified leads (MQL) by combining engagement scores from marketing automation platforms with Oracle DataFox account scoring, which includes both Oracle DataFox firmographics and CRM account data.

Leads are enriched with this score, along with robust company data, to screen MQLs based on Ideal Client Profile (ICP), improving MQL quality and conversion rates as shown in this screenshot.
This can be incorporated into existing engagement scores from marketing automation platforms to screen MQLs based on Ideal Client Profile (ICP).

With account scoring influencing your Lead Score, you can have historical leads appear again when the company or lead have the right criteria.

**Qualify Leads with Account Scoring**

Steps vary based on which marketing automation provider you use and how you currently configure your lead scoring criteria.

- Confirm that the custom field for Oracle DataFox *Company Account Score (Account_Score__c)* is created in Salesforce on both leads and contacts and make sure that the *Company Account Score* field is synced with your marketing automation system.

  **Note:** Make sure the *Company Account Score* field is mapped from leads to contacts immediately, otherwise this data gets lost when leads are converted to contacts.

- Adjust your lead scoring criteria to include the Oracle DataFox account score. Here are some examples:
  - Positive scoring example: If Account Score is greater than 200, then increase Lead Score by 20 points.
  - Negative scoring example: If Account Score is lesser than 50, then decrease Lead Score by 20 points.
Measure Lead Quality by Account Score

Measure lead quality by account score uses account scoring on leads to measure the company fit value of various campaigns.

The execution of this use case is to incorporate score on the lead object to pull reports in Salesforce. Here are some examples of reports that can be used to measure various channels based on company fit:

- Are we driving engagement from best-fit accounts?
  
  Report: Inbound leads from high-scoring accounts, by week

- Are we driving demand from best-fit accounts?
  
  Report: Demo requests from high-scoring accounts, by week

- Which of our campaigns or channels are driving the most engagement from best-fit accounts?
Account-Based Marketing Execution Alignment

Account-Based Marketing (ABM) execution alignment uses account scoring as a universal measurement to send best-fit companies to ABM execution campaigns.

The account score can be used to send high-scoring accounts to ABM campaigns, such as:

- Digital ads (LinkedIn or other third-party ad providers)
- Direct mail
- Email
- Web personalization

Create a Dynamic List with High-Scoring Accounts

To create a dynamic list with high-scoring accounts, you must first filter for high-scoring accounts in Oracle DataFox. Doing so is easy, and let's see how.

1. Sign in to your Oracle DataFox instance and navigate to the Companies tab.
2. Click Add a Filter and navigate to Account Scoring.
3. Enter a minimum value based on your account scoring setup. The minimum value varies, but for example, let’s set it as 300, as shown in this screenshot.
4. Click **Apply**.

   After the **Account Score** filter is applied, names in the Conference tab are updated.

5. Click **CREATE DYNAMIC LIST** as shown in this screenshot.

6. On the Create Dynamic List page, enter the details.
7. Sync the dynamic list to Salesforce. Click the icon for **Manage List Name Syncing to Salesforce** as shown in this screenshot.

Your list is pushed and synced to Salesforce.

8. Sign in to Salesforce to run the dynamic list.

9. In your Salesforce instance, click **Reports** and then click **New Report**.

10. In the Select Report Types to Hide page, click **Create**.
11. Filter with DF Lists (enter this in the search field for faster results) for the specific dynamic list you just created, as shown in this screenshot.

You have now created a dynamic list for high-scoring accounts and synced it with Salesforce.
16 Workflow Integrations

Spreadsheets Imports and Exports

Oracle DataFox lets you import and export lists using spreadsheets. You can also import Oracle DataFox columns with custom data in bulk.

Growth Equity Use Case

Oracle DataFox lets you import lists, allowing you to ingest proprietary information for further analysis. Examples of what you can send include:

- PitchBook Fields
- Proprietary information from a spreadsheet (aggregated software review metrics)
- Similar Web traffic

Let's see how we can send this information directly to Oracle DataFox.

Initially, let's use Pitchbook as an example. To begin with, create a Custom Field.

**Note:** The instructions mentioned in the Create Custom Field section use Pitchbook Pre-Money Evaluation as an example column. Choose your own column name as appropriate.

Create Custom Field

1. Log in to Oracle DataFox and navigate to **Settings > Fields**.
2. Click **Add Custom Field**.

![Add Custom Field](image1)

3. In the Define Custom Field window, enter name, description, and text for the custom field. In our example, we have it as shown in this screenshot:

![Define Custom Field](image2)

Now that you have created the Custom Field, you need to upload the relevant customer information. This differs based on your organization, but in this example, let’s use CSV files.

**Upload Custom CSV**

1. To accurately sync information to Oracle DataFox, make sure the columns in your CSV or Excel file are accurate, like this screenshot.
### Note: This is only sample data.

2. To upload the list, click **Upload List**.

3. In the Upload a Company List page, select **Import list and save to DataFox** and click **Next**.
4. On the Import Your List Into DataFox window, upload your list. Again, we’re using an example file.
5. You can see the list name appear before you upload. Click **Next**.
6. This step is important, as you need to map this custom list to your custom field. Select the appropriate field under Mapped to Custom Field and click Upload List.

Now, you can see a message that the successful upload is successful.
Now, your list is uploaded and you have successfully mapped custom information to your custom field. 7. To use it, all you need to do is navigate to the Companies tab and select **Fields**.

As you can see, your custom field now shows up. You can drag as desired to improve the interface organization while simultaneously taking advantage of its feature.

**Sales Team Use Case**

The list import function allows you to ingest custom information into Oracle DataFox to give your reps accurate data. Or, it creates more strategic options when identifying top performing accounts.
For example, you can send over:

- MAU (monthly active users) from MixRank or Apptopia
- Similar Web (web traffic)
- Custom CRM information (e.g., Hubspot account owner)

To use this strategy, you must create and filter custom fields. Let’s see how.

Create Custom Field

1. Sign in to Oracle DataFox and navigate to **Settings**.

2. Click **Fields**. You can see custom fields that you have created.

3. Click **Add Custom Field**.

Now, a new window appears. Here, you can create your custom field with details preferred. For our example, we’ll make a custom field with Hubspot Account Owner. You can set a description and modify its type, but for now, we’ll leave it as Text. Now, select **Create Field**.
4. The created custom field now shows up as shown in this screenshot.

Now that you have created the Custom Field, you need to upload the relevant customer information. This will differ based on your organization, but we'll use one of our CSV files as an example.

**Upload Custom CSV**

1. In your C column, make sure the name and Custom Field name match, as shown in this screenshot.
2. With your list prepared, you want to upload this to Oracle DataFox. To do so, navigate to the Upload List tab.

3. As you can see, there's an option to upload your own CSV list. Select that and click **Next**.
4. On the Upload to get an enriched CSV page, select and upload your list. Let's use the example file.

5. Click **Next**.
The next step is crucial, as you need to map this custom list to your custom field.

6. Select the appropriate field under **Mapped to Custom Field** column, and then click **Upload List**.

A message appears after the upload is successful.

You have successfully mapped custom information to your custom field.

7. To use this, navigate to the Companies tab and click **Fields**.
As you can see, your custom field now shows up. You can drag as desired to improve the interface organization while simultaneously taking advantage of its feature.

Import Company Lists

Import your list of companies from a spreadsheet to create a static list which appears on the Lists page. Your list must be less than 40,000 rows so that your import is successful.

If your list of companies is in a different format or is sourced directly from a website, you can also send the source directly to Oracle Support. Oracle Support parses the data, adds a list of companies to your account, and notifies you when it's ready.

**Note:** Ensure that you don't select any fields with Personally Identifiable Information (PII). PII is any information that's used to uniquely identify a contact or locate a person such as social security numbers, addresses, phone numbers, and so on. Oracle DataFox doesn't use any PII data to filter companies or score them.
Why Import?
Importing lists, for example, lets you select from several fields beyond names and URLs. You can create mappings to existing columns or create new ones.

You can take your spreadsheets with company names and URLs and enrich it with data. You can immediately export it as a CSV without needing to save it as a list on Oracle DataFox.

You can also view any of your previous uploads in the History tab.

Let’s look at different methods to upload company lists. Upload List is accessible from anywhere on the Oracle DataFox module.

Option 1: Import List

1. When selected, you’re presented with three options. Here, we’ll start with Import list and save to DataFox option.

2. When selected, you are brought to another screen for uploading an Excel or CSV file.
3. You can browse for your files or simply drag-and-drop them into the provided space. Additionally, you can name the list and add a description for improved clarity.

When you upload the list, you receive several messages indicating the upload process. After the list is successfully uploaded, a confirmation message is displayed.

You can use this function to compare records with your CRM application, filter lists, get alerts, and much more.
Option 2: Upload List for Enriched CSV

This option is suited to users if they prefer viewing lists in an Excel document. It also retains original company names and URLs while providing firmographic information (like location, headcount, revenue).

1. On the Upload a Company List page, click **Upload to get an Enriched CSV**.

2. Upload your Excel or CSV list directly or drag and drop the files.

   Unlike the first option, however, you won't name or describe the file.
Option 3: Let Oracle Process Your List

You can upload lists and documents of various types and allow Oracle Support to parse the information for you. These document types include Word, Excel, PDF, logo images, screenshots, website links, and text files.

**Note:** You can request up to a total of five manual list imports and conferences in a month. For example, consider you have requested for one manual list import and one conference in a month. You can then only request a total of three conferences and manual list imports for the rest of the month.

1. On the Upload a Company List page, click *Let us process your list for you.*
2. Upload the mentioned file types at your discretion.
When you upload your requested file, you will receive a message as shown in this screenshot.

The turnaround time for lists generally depends on the size of the list and the quality of data. Oracle Support typically finishes lists in 1-3 days. If you need the list request rushed for any reason, please include a note in the comments section.

You can also view your history of uploaded lists in the History tab.
Importing lists allow you to better organize potential prospects and create valuable contact leads.

Download and Extract Company Info to CSV

You can download company info from the Data view in a list or dynamic list.

1. Navigate to the Lists tab to view a list or dynamic list.
   
   You can only download from a List or Dynamic List.
   
   If you need to create a custom list or dynamic list, you must first set filters or check relevant companies. After you set filters, you can click Create Dynamic List on the Lists page or Add to List from a list to download data from your saved lists module.

2. Add fields for you to download.
   
   Now that you have your custom list (navigate to the Lists page and select it), you can select the arrow icon and choose to download the columns per your specifications.

   **Download Current Columns** only downloads the columns you set, while **Download All Columns** downloads all filters regardless of selection.

   If you want to modify the columns to download, you can do so by selecting the **Customize Fields** option.

   This screenshot shows the Customize Fields dialog box.
Download Round-by-Round Funding Info

The download from the data view only includes funding info for the latest round, date, amount, and investors. To download funding information by funding round, you must do a separate download per these download by funding round instructions. See Download Round-by-Round Funding Amounts, Dates, and Investors.

Create Custom Fields and Populate by Bulk Upload

Here’s how you can create and upload custom fields, to include the data that doesn’t exist in Oracle DataFox. You can include these custom fields when you create lists and set your scoring criteria.

Create Custom Fields

1. On the user menu, click Settings, and then click the Fields tab.
2. On the Fields page, click Add Custom Field.
3. Enter the field name, description, and select the field type from the Type list. You can also create a Picklist, where you can define values for a drop-down. Or you can add a Teamlist, which includes the Oracle DataFox users on your team account.
4. Click Create Field.

Bulk-Upload Data to Custom Fields

1. Create a CSV file containing a row for each company and a column for each custom field.
   a. If you have already run a matching process, use the DataFox ID as the first column. Otherwise, the first two columns must contain the company name and URL. Make sure you name these columns as Name and URL.
Ensure that you name the other columns with the same names that you used for the custom fields that you created.

2. From the navigation menu, click **Upload List**, and upload the CSV file that you created.
3. Click **Next**.
4. Ensure that your fields are mapped correctly.

This screenshot shows how you can map the additional fields in your CSV file correctly.

If you want to make more changes, click **Back**.

5. To proceed with the field mappings, click **Upload List**.

Your list with custom fields is now being uploaded. A pop-up notification is displayed when it's uploaded successfully. Go to the Lists tab to locate the list you uploaded.

**View and Edit Custom Fields**

Click the Companies tab or one of the lists on the Lists page to view your custom fields.
Here's what you can do to edit the custom fields.

1. If you’re on the Companies page, click the **Customize Fields** icon. If you’re on any of the lists, click the **More Options** menu, and click **Customize Fields**.
2. In the Customize Fields dialog box, search for your custom field in the Inactive Fields section.
3. Add the custom field to the Active Fields section.
   - You can drag where you want the custom field to appear in the Active Fields section.
4. Click **Close**.
5. On the Lists page, double-click any field to add, edit, or remove data.

### Create Dynamic Lists with Custom Fields

1. Click on the Companies tab.
2. On the Company search page, click **Add a Filter**.
3. Select **CRM/Custom Data** and click **DataFox Custom Columns**.
4. Select relevant filters.
   - You can also use the search Filters section, to enter the name of your custom field.
5. Click **Apply**.
6. Click **Create Dynamic List** to save your filter.

For more information on how to create lists, see **Static and Dynamic Lists**.

### Create Scoring Criteria with Custom Fields

1. Click the Account Scoring tab.
2. On the Account Scoring page, select the Draft Criteria tab, and then click **Add Criteria**.
3. Select **CRM/Custom Data** and click **DataFox Custom Columns**.
4. Select relevant filters.
   - You can also use the Search Filters section, to enter the name of your custom field.
5. Click **Apply**.
6. Enter a name for the account scoring criteria.
7. Click **Done**.
8. On the Account Scoring page, select a scoring weight for the criteria.

For more information on how to create account scoring criteria, see **Account Scoring**.

### Download Round-by-Round Funding Amounts, Dates, and Investors

You can download round-by-round funding info by going to any company profile or list.

**Note:** Downloading funding rounds only works for lists, not for dynamic lists.

### Download Funding Info for Single Company

1. Navigate to the Companies tab and select a preferred company profile.
2. Select **Total Funding** to view a company's funding rounds.

On the Funding History Page, click Download All to download the CSV file.

**Download Funding Data from a List**

Within a List, select **Download Funding Rounds** from the **Download** drop-down options.

Again, the data downloads in CSV file for analysis.

The file includes these fields:

- Company Name
- Company Id (unique Id for DataFox profile)
- Date of funding by day, month, and year
- Round
- Amount Raised
• Investors
• Investor Id (unique Id for DataFox profile)

Slack

Integrate Slack with Oracle DataFox

Slack is a useful communication tool for companies of all sizes. Now, you can integrate it with Oracle DataFox for greater accessibility and ease of use.

Connect Your Oracle DataFox Account to Slack

1. Sign in to Oracle DataFox.
2. Click your user name, and then click Settings.
3. Click Integrations.

In this example, you’re already connected to Slack. However, for first-time users, you see a prompt to connect to Slack.

Initially, you must connect to the Support channel. In this case, Oracle DataFox requests authorization to integrate with your own Slack channels.

4. Click Add to Slack.
Note: To authenticate Oracle DataFox for Slack, you need to have Slack permissions to add Apps and Custom Integrations to your Slack team.

You should now receive an Oracle DataFox welcome message in Slack (from slackbot). This confirms that Slack and Oracle DataFox synced properly.

Determine Which Alerts go to Slack

1. Sign in to Oracle DataFox.
2. Click your user name, and then click Alerts. In the Manage Alerts page, you can see the type and frequency of each alert next to the names of lists and dynamic lists.
3. Click any of the alerts listed to edit the alert.
Set Alerts to go to a Slack Channel or Slack User

To enable the Slack integration, set the frequency of your alerts to **Instant (Slack)**, and then enter the public Slack channel or the Slack member ID you would like these news alerts to go to. The **Slack Channel** text box auto-suggests channels already active in your Slack team. To copy a member ID, navigate to the profile within Slack and click the **More actions** icon.

**Note:** You can only get an alert into a private channel if you’re the person who set up your company’s Slack configuration. Everyone else must put them in public channels.

Confirm that the Instant Alert is Set Up

There’s an easy way to verify the alert is set to the channel correctly. Every time you change your alert settings, you get a notification in Slack from us.

So, if you turn ON a category like Corporate Updates or turn off a category like Events and Marketing, and then click **Save**, you get a message in your slack channel notifying you that your settings have been updated.

You should now see Alerts in your Slack channel(s).

Review Your Alerts

Optional: Set up Your Team Role

You can set up Slack for your team. For example, many of our sales organizations create separate channels for each sales representative.

By sending personalized alerts to distinct Slack channels or to specific users on Slack, you can empower your team with Company Signals in their workflow. See *Slack Alerts*.

Oracle DataFox for Slack Overview

By integrating Oracle DataFox Alerts with Slack, you get priority updates and actionable information.
Create Salesforce Email and Slack Alerts

This topic is meant for Salesforce users only.

Oracle DataFox’s Salesforce integration allows your team to stay up to date with signals on key accounts and receive notifications in a daily email, as a personal Slack message or to a custom Slack channel.

Salesforce Email Alerts

In the example below, let’s create alerts for our high-priority prospects.

1. On the Lists page, filter by Salesforce account owner and apply any additional filters such as tier 1 and 2 clients.
2. Create a notification by clicking the bell icon and toggle the notifications you would like to receive.
3. For email alerts, select **Weekly Email** or **Daily Email**, from the **Send Alerts Via** list.
4. Click **Save Alert Preferences**.

Instant Slack Alerts

1. Create a custom channel in Slack by clicking the + sign next to channel and name the channel. You can insert a purpose and invite relevant members of your team.
2. On the Lists page, click the notification bell.
3. Select **Instant Slack** from the **Send Alerts Via** list, and insert the same custom Slack channel or a personal Slack member ID.

   **Note:** To copy a member ID, navigate to the profile within Slack and click the **More actions** icon.

4. Click **Save Alert Preferences**. You start receiving instant alerts on a saved Salesforce filtered search in Slack.
Receive Slack Notifications on Your List or Dynamic List

Get instant notifications on your prospects or accounts sent directly to you as a personal Slack message or to a Slack channel. These alerts are great for knowing when to reach out to your existing prospects or keeping tabs on your target accounts.

Create a Public Channel in Slack

After you configure your Oracle DataFox platform for Slack integration, create a public channel in Slack. See Integrate Slack with Oracle DataFox.

For instance, if you would like notifications on your prospects, you could create a channel like #sean-prospects.

Note: If you’re the person who set up your company’s Slack configuration, you can create a private channel and receive alerts. All other users need to put them in public channels. For more information, see, Slack Alerts.
Set Up Alerts from a List or Dynamic List

1. After you create the channel, go to one of your Lists or Dynamic Lists in Oracle DataFox.
   
   See **Overview**.

2. Click the **Alerts** icon, as shown in this screenshot.

3. In the Signal Alert Preferences dialog box, set the **Send Alerts Via** field to **Instant (Slack)**, and then enter the Slack member ID or channel to which you want to send alerts to. Finally, choose the event types you want to receive.

   To copy a Slack member ID, navigate to the profile within Slack and click the **More actions** icon.

   **Tip:** If you aren't seeing any alerts in Slack yet, make sure that you entered the correct channel name without the # sign.
Confirm Slack Alerts Are Set Up

To confirm that your alerts are properly configured, click the assigned Slack channel and check for the confirmation message from Oracle DataFox.

You're now set to receive Alerts on your lists and dynamic lists via Slack.

Slack Alerts

Alerts are an important, essential aspect of the Oracle DataFox app. Oracle DataFox aims to avoid inundating you with unrelated news and unimportant data. Oracle DataFox has a system of algorithms and human auditors who de-duplicate news articles, classify and cluster similar concepts. Massive volumes of information is also distilled into a simplified feed with lower volume and higher quality insights. With the granular alert settings, you can toggle the news volume up and down to suit your preferences. For more details on the offered signal types, see Overview of Company Signals.

1. Let's make sure that your integration is set up properly.
   - On your Integrations settings page, make sure that the app is successfully connected.
   - Make sure that the channel you created is public. Private channels in Slack have a lock icon next to them, and public channels have a # icon.
   - Check that your alert settings worked. One quick test for this is to adjust your alert settings for one of your alerts (either on a list or dynamic list). Any time you change and save your alert settings, you should receive a confirmatory message in your Slack channel. To do this, select Alerts from the Profile icon in Oracle DataFox and toggle one of the Signal types on or off, and then click Save. You should receive a confirmation message when setting up your alerts.
   - If you don’t receive this confirmation message, then something is wrong with the underlying installation. Make sure that you have performed the following actions:
- Installed the Slack application correctly
- Set your alerts to instant
- Set the correct Slack channel in your alert settings
  o If you do receive this confirmation message, then your integration is set up properly.
  o If you’re the person who set up your company’s Slack configuration, you can create a private channel and receive alerts. All other users need to put them in public channels.

See:
- Integrate Slack with Oracle DataFox
- Receive Slack Notifications on Your List or Dynamic List

2. You have two options to control alert volume:
  o More companies: Many customers receive granular alerts on tens of thousands of companies. For example, you can use Oracle DataFox to find out every time a tech company in North America opens a new office. So the quickest way to receive more alerts is to track more companies. To do this, add more companies to your List or Dynamic List.
  o Broader Alert Types: Assuming you’re already following all of the companies you care about, you can also expand the types of Signals you receive alerts on. Go to the Alerts page and adjust which Signal types you want alerts on.
  o Click the bell icon and customize the type of Signal Alerts you receive.
  o On the Alerts Settings page, toggle the option **Uncategorized News** to maximize the volume of signals you receive.

  ![Uncategorized News Alert](image)

  o Use caution when checking this alert, as it generates a high volume of information which may oversaturate your lead potential.

## Install Google Chrome Extension

With Oracle DataFox Chrome Extension, you can quickly access company info like funding, location, and business description. This streamlines accessibility through multiple platforms.

1. Sign in to your Oracle DataFox application.
2. From your profile drop-down list, go to **Settings > Integrations > Google Chrome**.
3. Click the **Chrome Web Store** icon.
4. In Chrome Web Store, find the **DataFox Profiles** app extension.
5. Click **Add to Chrome**.
6. Click **Add Extension**.
7. In your browser, click the **Oracle DataFox** icon.

   The sign in page appears with two options to sign in.

8. Sign in with your credentials.

   If you subscribed to Oracle DataFox on or after December 10th, 2020, you sign in using Oracle Cloud. If you subscribed before this date, you sign in using your Oracle DataFox credentials.

9. Allow the extension to connect with your Oracle DataFox account.

You can now get company info on a website by clicking the icon in your browser.

---

Add a Company from the Chrome Extension

1. Enter the URL of the website where you want to see the company profile.
2. Click the **Oracle DataFox** icon.
3. Click **Submit**.
After you submit, you will shortly receive a confirmation email regarding your request. Oracle Support will contact you via email after the company profile is built.

Now that you have installed the Chrome extension, you can see the Oracle DataFox profile on any website. You can also send a request to Oracle Support to build a profile for a website that isn’t in the system.
17 Static and Dynamic Lists

Overview

You can use static lists to add or delete selected companies. You can use a dynamic list to set criteria for companies to be automatically added into the dynamic list. A dynamic list is a saved search created by the user. You can create static and dynamic lists to keep track of companies. It’s simple to create a list. Sign in to Oracle DataFox and click Lists.

Here’s what you can do with lists:

- Set up alerts and bookmark your list to keep it handy. For more information on setting up alerts, see Signal Alerts.
- Create account scoring criteria from the static or dynamic lists. For more information, see How You Use Account Scoring.
- Download lists to spreadsheets and work on them offline.

Note: The Technographics column doesn’t appear in downloaded spreadsheets.

This table shows the different tabs for a list and how you can use them.

<table>
<thead>
<tr>
<th>Tab</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Data</td>
<td>• View all the companies in the list.</td>
</tr>
<tr>
<td></td>
<td>• Add and remove companies from a static list.</td>
</tr>
<tr>
<td></td>
<td>• Salesforce users only: Select companies from a list and sync to Salesforce.</td>
</tr>
<tr>
<td></td>
<td>For details, see Sync a List Name into Salesforce.</td>
</tr>
<tr>
<td>Summary</td>
<td>• Get a high-level insight of the common characteristics of the companies on the list. For details, see Overview of Advanced Insights.</td>
</tr>
<tr>
<td></td>
<td>• Use filters and search for more companies. You can either create a new list with the companies or add to the existing list.</td>
</tr>
<tr>
<td>Signals</td>
<td>This page is available only for static lists.</td>
</tr>
<tr>
<td></td>
<td>View signals for all the companies in the list.</td>
</tr>
<tr>
<td>Similar Companies</td>
<td>This page is available only for static lists.</td>
</tr>
<tr>
<td></td>
<td>View companies that are similar to the companies in your list.</td>
</tr>
<tr>
<td>Conferences</td>
<td>View conferences that companies from the list attend.</td>
</tr>
</tbody>
</table>
Create a Static List
You can manually add or remove companies in your static list. These lists don’t update automatically. Here’s how you can add companies to a list from the Company Search, Company Overview, and Public Curated Lists pages.

1. Select the companies you want to add to your list.
2. Click Add to List.
3. Enter a list name.
4. Click Create List to add the companies to a new list. You can also add the companies to an existing list by entering your preferred list name.

You can remove companies that you no longer need in your static list. Select the companies that you want to remove from your list and click Remove.

Create a Dynamic List
You can set criteria to add companies to your dynamic list. When a company matches your criteria, the company is automatically added to your list.

1. On the company search page, add filters to get a list of prospect companies. To know more about using filters, see How You Prospect by Territory or Sourcing Criteria using Filters.
2. Click Create Dynamic List button.
3. Enter a name and click Create Dynamic List.

Delete a List
It’s very simple to delete a list. From the Lists page, click the More Options icon, and select Remove.

Share Lists to Collaborate with Your Team

1. Navigate to the My Lists tab on the Lists page.
2. Click the list you want to share.
3. Click the More Options icon and select Manage Sharing.
4. In the List Sharing Settings dialog box, enter the email addresses of the people you want to share the list with.

   Note: You could also click Share With Everyone to share the list with your entire team. However, it’s recommended you do that only if you have a small team.

5. Click Send Invitations.

Your team can now view your list and create a copy of the list to make any changes.

To create a copy, click the More Options icon and select Copy list for a static list or Save changes as new Dynamic list.
Search LinkedIn Contacts From An Oracle DataFox List

You can use the LinkedIn integration to find contacts across all the companies in a list. For example, you can search for people with the title CFO in your LinkedIn connections across the companies in the list.

Filter Companies and Create a List

1. Click the Companies tab.
2. Click Add a Filter.
3. Apply the relevant filters until you have a list of target companies that match your criteria.
4. Click Apply.
5. Create a static or dynamic list. For details, see the Overview topic.

Find Contacts

1. Click the Lists tab and open your list.
2. Click the More Options icon and select Find Contacts.
3. In the Find Contacts on LinkedIn dialog box, enter a title to search for connections with that title. Alternatively, use the options under Seniority, if you’re a LinkedIn Premium member.
4. Click Search My Connections, Search Sales Navigator, or Search Recruiter, depending on your LinkedIn account type.
   
   You’re redirected to the LinkedIn sign in page.
5. Sign in to LinkedIn to view contacts based on your search criteria.

You can now connect with your filtered LinkedIn contacts.
Frequently Asked Questions

How is Headcount Verified?

Verifying Headcount
Oracle DataFox sources headcount and location from a number of sources. These include Zoominfo, Crunchbase, company filings, and company websites. We also source this information from our Signals as structured data points from news and events.

With multiple sources providing different values for headcount and location, we use waterfall charts and data recency to determine which sources to pull from.

Additionally, our team of data auditors tests those data points by looking at additional sources to verify the data. So for any headcount or location marked as **Verified**, that means one of our auditors reviewed the record in the last 6 months.

Using this verified data, we're able to update the priority for which sources provide the best information and should be available on Oracle DataFox company profiles.

You can search and filter for companies with verified headcounts. You can also limit that filter to headcounts checked by our analysts, as shown:

![Headcount Filter](image)

This headcount filter allows you to identify companies of certain employee sizes, per your specifications.
How Can I Request to Add a Company to Oracle DataFox?

You can submit a request to add a company that you don't find in Oracle DataFox.

To get the company added, on the user menu, click Submit Company. Enter the details of the company that you want added, and then click Submit.

It usually takes a few business days for Oracle Support to verify the company details and process the request.

How Can I Suggest Edits to an Existing Company?

On the Companies tab, select the company you want to submit edits for. Click the Suggest Edits icon to submit details of missing or incorrect information.

Can I Configure the Timeout Duration?

Oracle DataFox follows the standard SaaS timeout duration, so you have to sign in again after 1 hour of inactivity. You can't configure this duration in the application.
Common Terms and Field Descriptions

Common Terms

Oracle DataFox uses a variety of phrases and key terms to define modules. Here are some of the most common:

- **List**: A sorted collection of companies.
- **Private List**: A created list that can only be viewed and followed by its creator.
- **Public List**: A list that can be viewed and followed by any DataFox user.
- **Company Search**: Search and browse for all companies.
- **Dynamic List**: A search where its criteria settings have been saved to be re-used.
- **Conferences**: Events and meetings.
- **Company Signals**: News stories regarding a company.
- **DataFox iFrame**: Visualforce page in Salesforce that allows you to view DataFox company profile pages.

Field Descriptions

Here’s the glossary of all the fields in Oracle DataFox and their descriptions. Let’s use Bigcommerce to demonstrate the examples.

**Note**: All the organization names mentioned here are fictional.

Oracle DataFox updates data in these fields periodically, and the frequency of updates varies from field to field. If a field has the verified check mark, you can hover to see when the data for the field was last verified by a human.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Top Keywords</td>
<td>Keywords describing the business</td>
<td>business development, ecommerce, saas, retail, software, enterprise software, software development and design, engineering software, retail software</td>
</tr>
<tr>
<td>Year Founded</td>
<td>Year company was founded</td>
<td>2009</td>
</tr>
<tr>
<td>Exit Status</td>
<td>Private, Public, Acquired, Closed down, Subsidiary</td>
<td>Private</td>
</tr>
<tr>
<td>Location</td>
<td>The primary geographic location</td>
<td>Austin, TX</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
<td>Example</td>
</tr>
<tr>
<td>------------------------</td>
<td>------------------------------------------------------------------------------</td>
<td>--------------------------</td>
</tr>
<tr>
<td>Phone Number</td>
<td>The primary phone number for the company</td>
<td>(888) 669-8911</td>
</tr>
<tr>
<td>URL</td>
<td>The main web address</td>
<td><a href="http://www.bigcomputers.com">www.bigcomputers.com</a></td>
</tr>
<tr>
<td>Score</td>
<td>Overall score (composite of other scores)</td>
<td>1009</td>
</tr>
<tr>
<td>Revenue Estimate</td>
<td>Revenue estimate provided by a third party</td>
<td>7500000000</td>
</tr>
<tr>
<td>Note: The field in the Oracle DataFox app rounds the revenue estimate to the nearest place value. However, the REST API shows the exact figure.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Last Funding Round</td>
<td>Series a, b, late stage</td>
<td>Late Stage</td>
</tr>
<tr>
<td>Last Round Date</td>
<td>Date of the last round of financing</td>
<td>5/9/2016</td>
</tr>
<tr>
<td>Last Round Amount</td>
<td>Amount of the last round of financing</td>
<td>$30,000,000</td>
</tr>
<tr>
<td>Months Since Last Funding</td>
<td>Months since the last round of financing</td>
<td>16</td>
</tr>
<tr>
<td>Investors</td>
<td>List of investors</td>
<td>Vision Corporation, Seven Corporation, Large and Associates</td>
</tr>
<tr>
<td>Headcount</td>
<td>Number of employees provided by a third party</td>
<td>450</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
<td>Example</td>
</tr>
<tr>
<td>------------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>-------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Note:</td>
<td>The field in the Oracle DataFox app rounds the headcount to the nearest place value. However, the REST API shows the exact figure.</td>
<td></td>
</tr>
<tr>
<td>CEO Name</td>
<td>Name of the CEO</td>
<td>Joe Smith</td>
</tr>
<tr>
<td>Tech Stack</td>
<td>Technologies the company uses</td>
<td>Mandrill, eXelate, Index Exchange</td>
</tr>
<tr>
<td>Technographic Categories</td>
<td>Categories of technologies that companies use</td>
<td>CRM, ERP, Mainframe Computers</td>
</tr>
<tr>
<td>Technographic Vendors</td>
<td>Vendors that provide technology</td>
<td>First Software, Large and Associates</td>
</tr>
<tr>
<td>Secondary NAICS Codes</td>
<td>Secondary income-producing lines of business</td>
<td>NA</td>
</tr>
<tr>
<td>Primary NAICS Codes</td>
<td>Primary income-producing lines of business</td>
<td>NA</td>
</tr>
<tr>
<td>Overview</td>
<td>A lengthy description of a company</td>
<td>BigComputers is a true all-in-one e-commerce platform with the power to grow your business &amp; help you sell more.</td>
</tr>
<tr>
<td>Stock Ticker</td>
<td>Company stock ticker</td>
<td>NA</td>
</tr>
<tr>
<td>Postal Code</td>
<td>Zip code</td>
<td>78726</td>
</tr>
<tr>
<td>Parent</td>
<td>Company that's an immediate owner of another company, and has subsidiaries</td>
<td>Metasolv is the parent company of Orchestream</td>
</tr>
<tr>
<td>Domestic Parent</td>
<td>The highest-level parent in a company's corporate ownership chain that's in the same country as the company</td>
<td>Orchestream is the domestic parent of Orchestream</td>
</tr>
<tr>
<td>Global Parent</td>
<td>The highest-level parent in a company's corporate ownership</td>
<td>Oracle is the global parent of Orchestream</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
<td>Example</td>
</tr>
<tr>
<td>---------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>--------------------------</td>
</tr>
<tr>
<td>chain irrespective</td>
<td>of the location</td>
<td></td>
</tr>
<tr>
<td>DataFox Slug</td>
<td>Unique identifier that's derived from the company name and identifies a</td>
<td>spruce-street-foods</td>
</tr>
<tr>
<td></td>
<td>company listed in Oracle DataFox.</td>
<td></td>
</tr>
<tr>
<td>My Private Notes</td>
<td>Personal notes</td>
<td>NA</td>
</tr>
<tr>
<td># of Children</td>
<td>Number of subsidiaries</td>
<td>0</td>
</tr>
<tr>
<td>Total Funding</td>
<td>Total amount of funding</td>
<td>155204369</td>
</tr>
<tr>
<td>LinkedIn URL</td>
<td>Company LinkedIn URL</td>
<td><a href="http://www.linkedin.com/">http://www.linkedin.com/</a></td>
</tr>
<tr>
<td></td>
<td></td>
<td>company/&lt;LinkedInID&gt;</td>
</tr>
<tr>
<td>Other Lists</td>
<td>Other lists you can access that contains this company</td>
<td>NA</td>
</tr>
</tbody>
</table>