ORACLE

Oracle Eloqua Contacts

User Guide

Contents

Contacts

A *contact* is a data entity that contains the explicit data around an individual person in the database.

Contacts (and associated accounts) are used as the primary building blocks for segments. Contact information can be derived from email responses or form submissions, from website visits, event registrations or via external (non-Eloqua) activities. Contact activities are categorized and searchable in Eloqua using a *Unique Identifier* field. The most common unique identifier is the contact's email address, however it is also possible to have contacts in your Eloqua database that do not have an associated email address. Learn more about adding contacts without an email address.

Eloqua has two different types of standard data entities:

- **Contacts**: Individuals whose data is stored in the Eloqua database,
- **Accounts**: Records about accounts (sometimes referred to as *Companies*), each of which has affiliated contacts.

Creating contacts

You can create a record for a single contact in your marketing database by entering the contact's data in the *New Contact* window (as outlined below), or you can upload data for multiple contacts at once using the contact upload wizard.

Good to know:

- Email addresses may not contain spaces.
- If values are entered in a Date/Time or Numeric field (according to data type), then the format of the values entered must correspond to the allowable formats set in your application. Furthermore, the value will be changed in the field to the default format used in the database (for example, for a Date/Time: yyyy-MM-dd HH:mm:ss, with HH:mm:ss set to "00:00:00" if no values are entered). Contact your Customer Administrator if you need more information.
- In the Redwood experience, all required fields displayed must be completed before you can create the contact.

To add a single contact:

1. Navigate to **Audience**, then click **Contacts**.
2. Click the button to begin creating the contact:
    - In the classic UI, click **New**.
    - In the Redwood experience, click **Create**.
3. Add the contact details to the fields available. You can change the view to access more fields.
4. Save your changes.
    - In the classic UI, click **Save**.
    - In the Redwood experience, click **Create**.

Uploading contacts

Important: You will receive a validation error when attempting to update to a contact with non-breaking spaces in their email address. When notified of the error, please update the email address as it is invalid and contacts with these email addresses will not be able to be re-saved, included in data imports or have forms and emails submitted to them.

You can use an upload file to make the following types of updates to your contact database:

- Add or update contacts
- Change email addresses
- Unsubscribe contacts from lists
- Identify contacts with hard bouncebacks
- Delete contacts
- Change SMS opt in/out

> **Important**: This feature is only available if your organization has purchased SMS services. Please contact your account manager for additional information and pricing.

Tip: To schedule an import or to import from a file stored on an SSH File Transfer Protocol (SFTP) server, you can use the data import tool. See Importing contacts or accounts for more information.

Learn more by watching the video

Before you begin:

- Create your upload file (.txt, .csv, .xls, .xlsx). The upload file should only contain the contacts that you want to update or delete. For example, if you are uploading a list of bouncebacks, don't include contacts that are not bouncebacks.
- Separate contact fields in a .csv or .txt file using a comma (,), pipe (|), tab, or semi-colon (;).
- Any field may be quoted (with double quotes).
- Fields containing a line-break, double-quote or the selected delimiter must be quoted.
- If double-quotes are used to enclose fields, then a double-quote in a field must be represented by two double-quote characters.
- The first row of the file must be column headings. Oracle Eloqua will attempt to map the headings to existing contact fields.
- If you are adding or updating contacts, make sure that you can map the data in your upload file to contact fields in Oracle Eloqua. Use similar naming conventions in your upload file to make this mapping easier.

- Make sure that contacts in your upload file have a unique identifier (such as an email address).
- The SMS Opt In/Out update requires the following columns be in the upload file:

Column No	Column Name	Values
1	Phone Number	Should be in International or e.164 format
2	Preference	Should have either of these values only: • Opt-In • Opt-Out

To upload multiple contacts using the contact upload wizard:

1. Navigate to **Audience**, then click **Contacts**.
2. Choose the upload action:
   - In the classic UI, click **Upload**.
   - In the Redwood experience, click **Upload Contacts**.
3. Complete the information about the upload. You'll want to be sure to click the correct type of upload from the **Import Purpose** drop-down list.
4. Verify the contents of the file on the **Review** tab and click **Next Step**.
5. Complete the **Map Fields** window and continue.
   - If you are adding or updating contacts, make sure you map all the data in your upload file to the applicable contact field.
   - Also, make sure that you select when you want the contact fields to update. For example, update the field if it is blank or not blank. Using **Set to default** will use the default configuration for each field. If a specific field should be updated differently than the rest, you can configure the update type for that specific field.
6. Complete the final step of the wizard. You can add the contacts into a shared list and optionally

7. Click **Finish**.

Troubleshooting

You might notice that some of the data from the upload file did not make it to the contact record. There can be a few reasons why this may happen:

- In step 3 of the wizard, you can change when to update contact fields. For example, to only update the contact field if it is blank or to always update the field. Check to make sure you've selected the desired setting.
- If you selected the **Set to default** update type, this will use the default update method configured by your administrator (*Settings > Manage Fields and Views*). So, if you have unexpected upload results, consult your administrator on this default setting or upload the contacts again using a different update type. In the case where the upload used **Set to default**, and the field is setup to use **Update if new email address**, Oracle Eloqua will actually use the **Update if new value is not blank** setting. See Contact fields for more information.
- If a contact was recently updated by your CRM system, a manual upload might not update the contact record. This is because a manual upload usually has a lower data priority when compared to some other sources of contact data. An administrator can change the priority of manual uploads from *Settings > Integrations*. See this knowledge base article for more help.
- Data imports via SFTP or manual upload are subject to a 30-minute timeout.

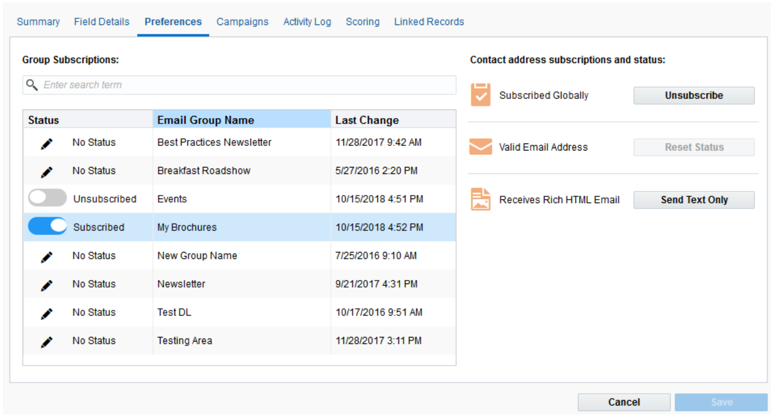
Editing contacts

Eloqua allows you to edit the records for existing contacts. You can add, remove, or change information to keep your contact records accurate and up-to-date.

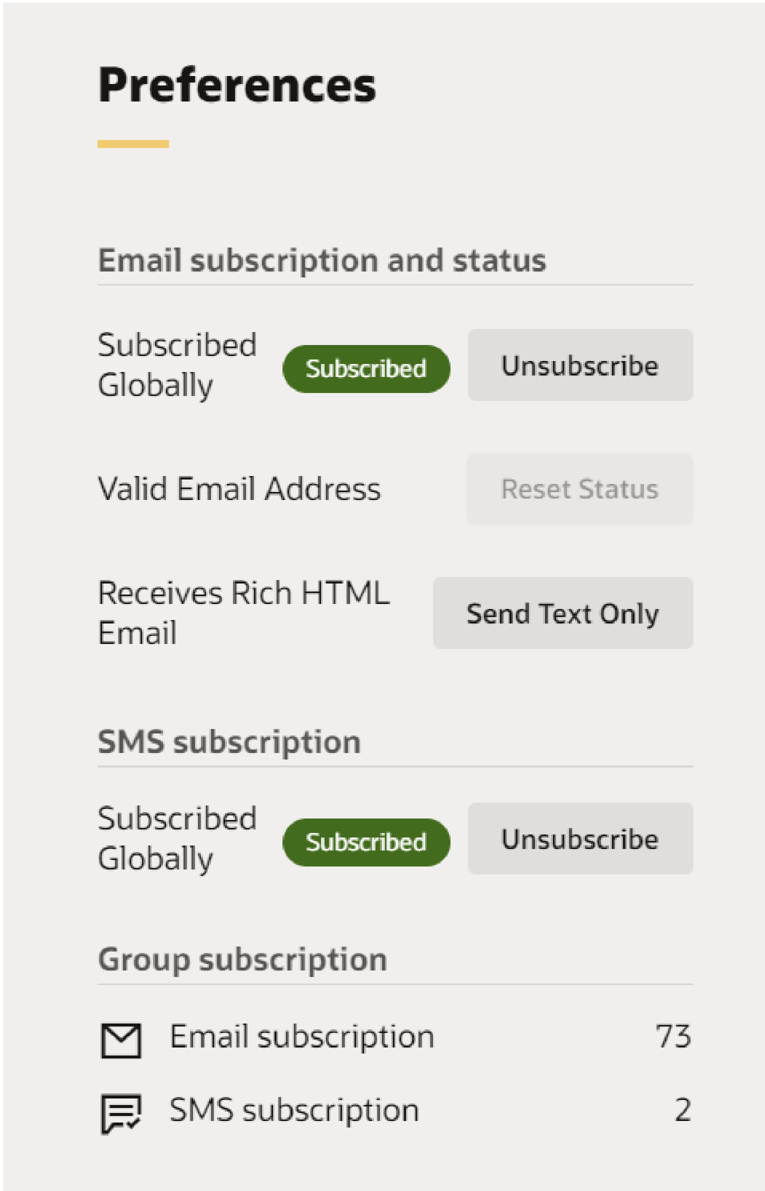
To edit a contact:

1. Navigate to **Audience**, then click **Contacts**.
2. Search for the contact you want to update. You can search by first name, last name, email address, or title.
3. Double-click the contact you want to change.
4. To update contact fields:
   - In the classic UI, go to the **Field Details** tab and make your changes. You can change the view to access more fields.
   - In the Redwood experience, click **Edit** on the summary panel and make your changes. You can change the view to access more fields.
5. To update email or SMS preferences:
   - In the classic UI, click the **Preferences** tab and make your changes.
   - In the Redwood experience, go to the **Preferences** panel and make your changes. Click an item in the **Group subscription** section to change email group or SMS subscription changes.

     Classic UI



Redwood experience


Preferences
Email subscription and status
Subscribed Globally
Subscribed
Unsubscribe
Valid Email Address
Reset Status
Receives Rich HTML Email
Send Text Only
SMS subscription
Subscribed Globally
Subscribed
Unsubscribe
Group subscription
Email subscription
73
SMS subscription
2

Updating a contact's subscription status or hard bounceback status

You can update a contact's subscription settings (global subscription or email group) or reset a hard bounceback status using the contact record. When a Oracle Eloqua receives a hard bounceback, the contact's email address is marked as invalid and you can no longer send emails to the contact.

> **Warning**: Be sure to verify that an email address is valid before resetting the bounceback status. Continuing to send emails to hard bouncebacks can impact your sender reputation and overall deliverability. Changing the bounceback should always be done with caution.

If you need to update a group of contacts, refer to the following topics instead:

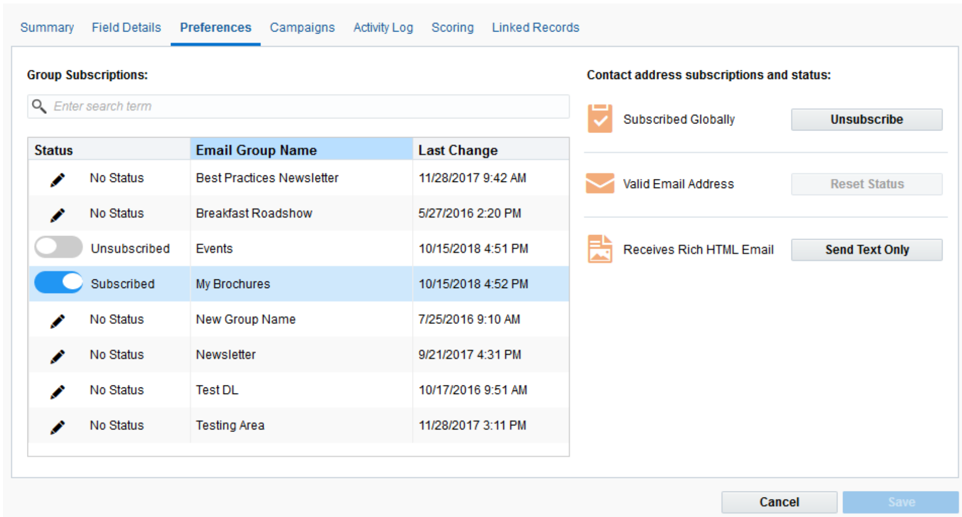
- To update the subscription status, use the contact upload wizard or the data import tool. To compare these methods, see Importing or exporting contacts or accounts.
- To reset the hard bounceback status for a group of contacts, use a shared contact list.
- To programmatically update subscription preferences, use the program canvas or program builder

To update a contact's subscription or email status:

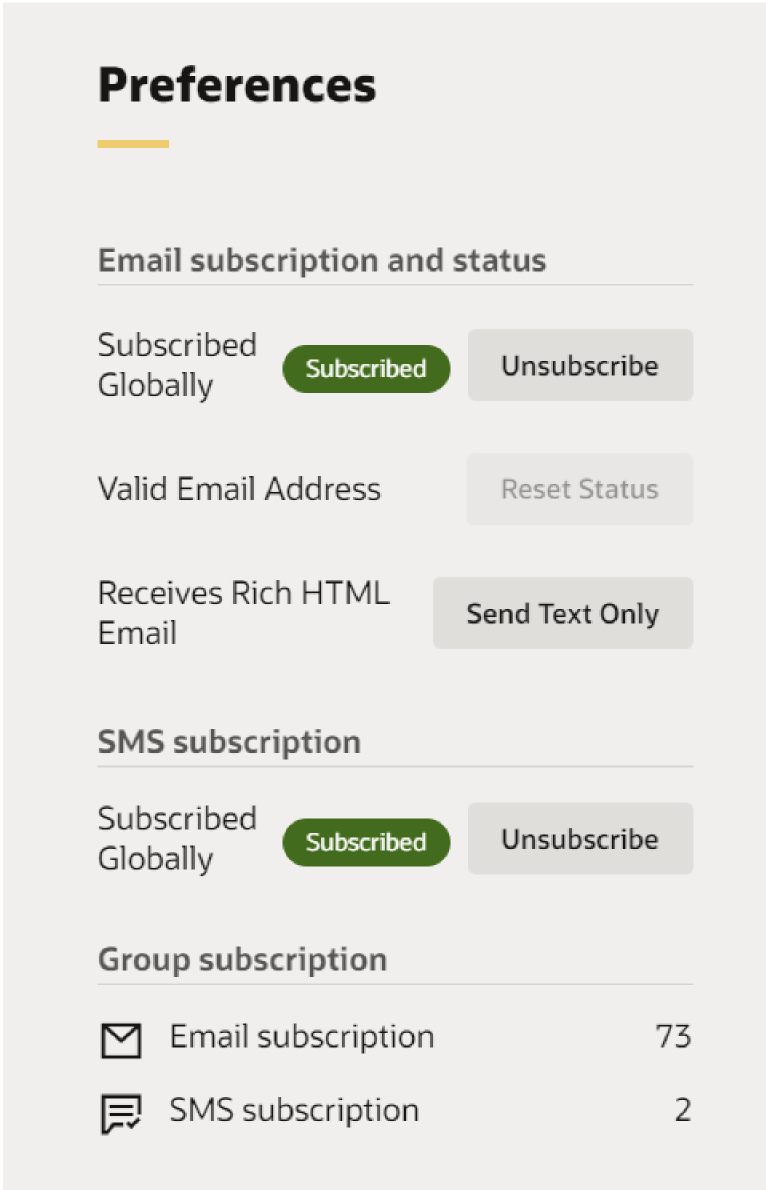
1. Navigate to **Audience**, then click **Contacts**.
2. Open the contact you want to update.

3. Open the preferences:

   - In the classic UI, click the **Preferences** tab.

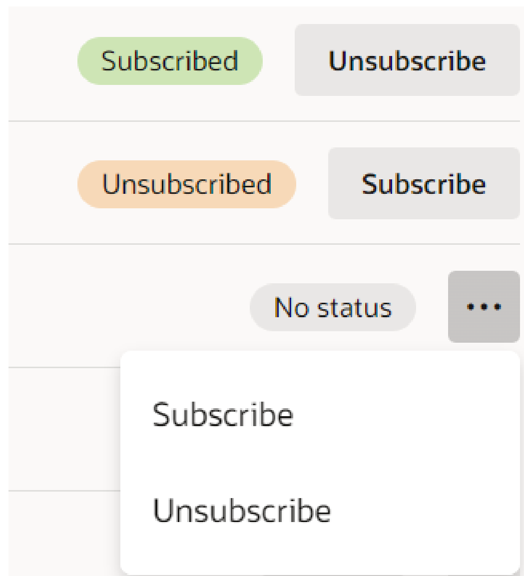


- In the Redwood experience, use the **Preferences** panel.



4. Choose an option:

Option	Steps
To change the contact's global subscription status	Click **Unsubscribe** or **Subscribe**.

Option	Steps
To change the contact's email group membership	• In the classic UI, in the left pane, click  if the subscription status has not been set, or toggle the **Subscribe** and **Unsubscribe** option. • In the Redwood experience, click **Email subscription** and then toggle the subscription status. 
To reset a contact's hard bounceback status	Click **Reset Status**.

5. Click **Save**.

Flagging contacts to receive plain-text emails

Note: We're updating our help center to reflect the new Redwood experience. During the transition, some content reflects the previous version of the UI.

With Oracle Eloqua, you can flag contacts to ensure that they always receive the plain-text version of emails.

Note: Plain-text emails do not include a tracking pixel. Without a tracking pixel, you can only view engagement metrics if a link is clicked.

To flag a contact to receive plain-text emails:

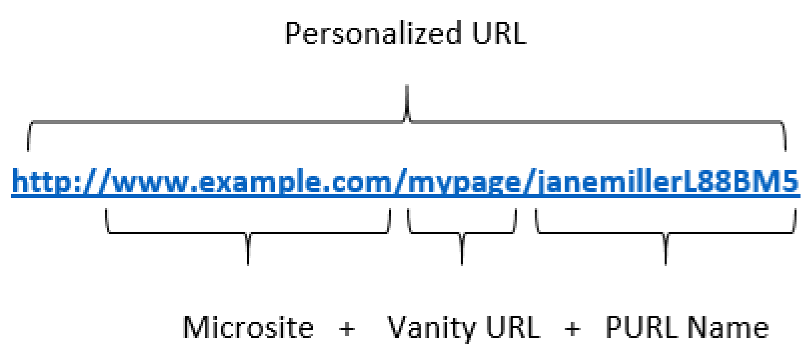
1. Navigate to **Audience**, then click **Contacts**.
2. Open the contact you want to update.
3. Go to the preferences:
    - In the classic UI, click the **Preferences** tab.
    - In the Redwood experience, go the **Preferences** panel.
4. Click **Send Text Only** to flag the contact to receive only plain-text emails.
5. In the classic UI, click **Save** to save the change. In the Redwood experience, the changes are immediate.

About personal URLs (PURLs)

Personalized URLs (PURLs) allow marketers to create contact-specific URLs to help drive offline activity online as part of a multi-touch marketing campaign. You can easily include a contact's PURL on a direct mail piece and drive them to a personalized landing page to help increase conversion rates.

Email campaigns are already tied to a contact using their email address, so you do not need to use PURLs in an email. However, using a PURL in a direct mail campaign can help you to track the conversion rate.

A PURL consists of your microsite, landing page vanity URL, and a PURL name. The PURL name is unique to the contact.



- **Microsite** = http://www.example.com
- **Vanity URL** = mypage
- **PURL Name** = janemillerL88BM5
- **PURL** = http://www.example.com/mypage/janemillerL88BM5

When Jane browses to this site, it displays any customized elements and automatically links the page view to her contact record.

Note: If the PURL name is incorrect, but the microsite and vanity URL are correct, the landing page still displays.

Creating a PURL name

PURL names are generated by Oracle Eloqua when a contact is added to your database.

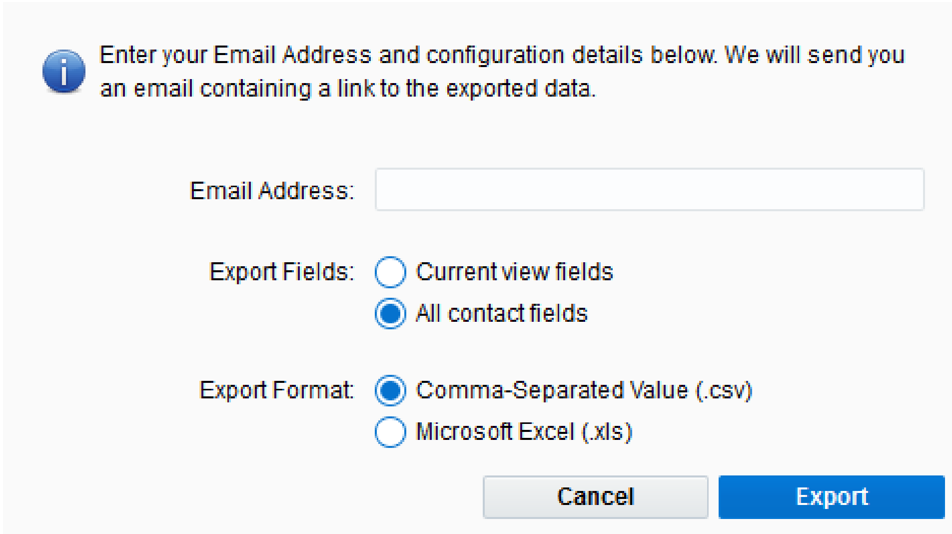
Exporting contact PURL name

You can export a contact's PURL name to a Microsoft Excel or .csv file. You can then use this export to help generate the PURL.

To export your contact PURLs:

1. Navigate to **Audience**, then click **Segments**.
2. Create a segment with the contacts that you want to export.
3. Click **View Contacts**.
4. Ensure that you've selected a contact view that includes the PURL name contact field. If one doesn't exist, you can create one.

5. Click **Export**.



6. Configure the export window and click **Export**.

A link to download the export data will be sent to the specified email address. The export is available from that link for 14 days.

Deleting contacts

Maintaining a healthy contact database is an important part of your marketing success. Some candidates for deletion might include:

- Contacts with hard bouncebacks
- Contacts that have unsubscribed from receiving any email from you
- Contacts deleted from your CRM system
- Contacts with a low lead score who are not prospects

> **Note**: Form submission data is only deleted after you perform two actions: exclude form submission data from reports, then delete the contact. For deleted contacts who have not been excluded from reporting, their form data is stored for 760 days. See Data retention for more information.

After you delete a contact record from the database, some information is retained from the contact record indefinitely. However, contacts you have deleted will be skipped when you send an email. If the contact re-engages your organization, Oracle Eloqua will then restore that information to the new contact record. Find out more about what is retained and restored.

> **Note**: If the contact you're deleting also exists in your CRM, you must ensure your CRM is up to date. Otherwise, the contact will be recreated in Oracle Eloqua when

there is an autosynch. Any custom objects populated by autosynchs will also be recreated. Find out more about what is retained and restored.

You can delete a single contact record or delete a batch of contacts.

Identifying contacts to delete

A good way to identify the contacts you want to delete is by using a segment. You can build the segment to target those contacts you want to delete (based on implicit or explicit contact information). You then export that segment and use it to delete the contacts from your database.

Tip: Consider how you can use filters to track and measure user inactivity. For example, you can use *Not Opened Any Emails*, *Globally Unsubscribed*, and *Not Visited Any Landing Pages* filters. These are only some of your options. Determine to what extent of inactivity justifies deleting a contact, and then set your filter criteria accordingly.

Alternatively, you can use the export tool to export contacts using a contact list or segment. This tool has some additional features, like scheduling and support for exporting to a SSH File Transfer Protocol (SFTP) server.See Exporting contacts or accounts for more information.

Deleting a single contact record

To delete a single contact:

1. Navigate to **Audience**, then click **Contacts**.
2. Search for the contact you want to delete.
3. Click to select a the contact and click **Delete**.

Deleting multiple contacts

Before you begin:

- Create your upload file (.txt, .csv, .xls, .xlsx). The upload file should only contain the contacts that you want to delete. You can create this file by using the methods mentioned in Identifying contacts to delete.
- If you are using a ,txt file, you can separate contact fields using a tab, comma (,), pipe (|), or semi-colon (;).
- Make sure that contacts in your upload file have a unique identifier (such as an email address).

To delete multiple contacts:

1. Navigate to **Audience**, then click **Contacts**.
2. Click the button to upload contacts.
   - In the classic UI, click **Upload**.
   - In the Redwood experience, click **Upload Contacts**.
3. Click **Delete contacts** from the **Import Purpose** drop-down list.
4. Upload your file.
5. Verify the contents of the file on the **Review** tab and click next.
6. Select the fields to use to match contacts in your upload file with the contacts in your database and click next.
7. Click **Next Step**.
8. Add an email address to receive notice when the upload completes.
9. Click **Finish** to begin the upload.

Understanding what contact data Oracle Eloqua retains and restores

After you delete a contact, Oracle Eloqua keeps the following information from the contact record indefinitely:

- Global subscription status
- Email address status (hard bounceback status or global subscription status)
- Bounceback history
- Email group subscription status

For reporting purposes, any previous activity associated with the deleted contact is still available from Insight. Any custom object records remain in the database, but Oracle Eloqua removes the linkage to the contact record.

Note: Form submission data is only deleted after you perform two actions: exclude form submission data from reports, then delete the contact. For deleted contacts who have not been excluded from reporting, their form data is stored for 760 days. See Data retention for more information.

You can opt to automatically delete custom object records when a contact is deleted by configuring your custom object settings. Learn more about this controlled availability option.

Tip: You can use a program to delete the custom object records. For more information, review this example.

About restoring a contact

If a deleted contact re-engages your organization (for example, by submitting a form), Oracle Eloqua creates a new contact record.

The following information from the original contact record is restored:

- Information from the original contact record:
  - Global subscription status
  - Email address status
  - Bounceback history
  - Email group subscription status

If the contact had previously globally unsubscribed or had an email status of *Bounceback*, you must reset the contact's subscription and email status before you can re-engage the contact. See Editing contacts for more information.

Oracle Eloqua does not retain or restore any other information from the original contact record. So, Oracle Eloqua does not restore the following information:

- Shared list membership
- Program membership history, like entries, exists, program paths
- PURL names - a new PURL name is created
- Custom object record linkages
- Date stamp values - for example, the contact's creation date is reset

Contacts restored from an CRM autosync

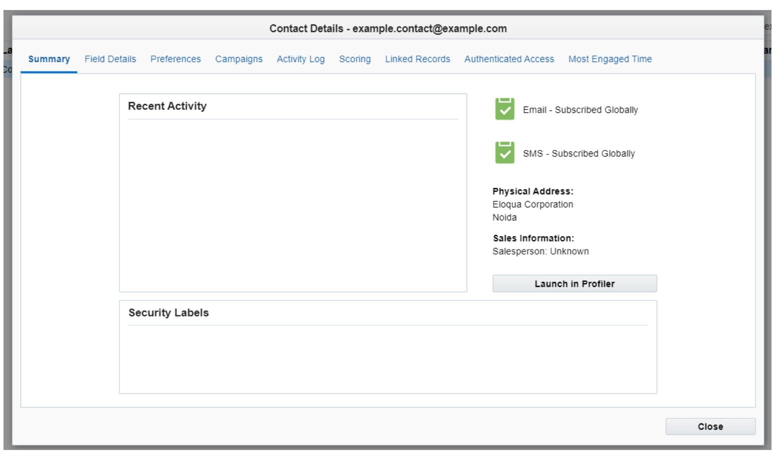
If the contact record is re-created via CRM autosynchs, any synchronized contact fields are re-populated from the CRM database. The autosyncs will not restore any fields populated by Oracle Eloqua. For example, form processing update rules are not re-populated. Any custom object records created by autosynchs are re-created, unless populated in an Oracle Eloqua field.

Searching and viewing contact records

Each contact in Oracle Eloqua has a record providing their details about the contact, their subscription preferences, and activities.

To search for and view a contact record:

1. Navigate to **Audience** , then click **Contacts**.
2. In the *Search* bar in the upper-right corner, enter a search string. You can search by:
    - First and Last Name
    - Email Address
    - Email Address Domain
    - Title
3. Double-click the contact to review the contact record.



The following describes the tabs available:

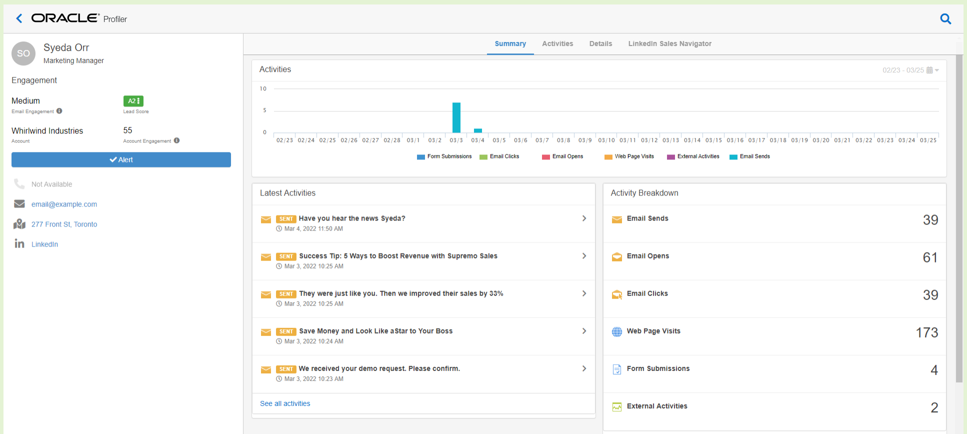
- **Summary**: This tab includes basic information about the contact including recent activity, their global subscription status, SMS subscription status, their physical address and sales rep (if applicable).
- **Field Details**: This tab provides the contact record details. Choose the contact view you want to use to update the fields displayed. Learn more about creating contact views.

- **Preferences - Email**: This tab shows the contact's email preferences, group subscription status, the status on the contact's email address, and the format in which the contact receives emails (Rich HTML or Text Only).
- **Preferences - SMS**: This tab shows the contact's SMS preferences, phone number subscription status, phone number status, and the validity of the phone number.
- **Campaigns**: This tab shows the contact's campaign responses. Choose a time frame to view the contact's campaign activity.
- **Activity Log**: This tab shows the activity history for this contact for the last year, such as contact's email and SMS activity, campaign or program entry, and so on. Choose a time frame to view, and optionally filter by activity type. You can view detailed campaign and program step information by choosing the *Campaign Entry*, *Program Entry*, or *Program Builder* activity types and then double-clicking the activity to drill down to a detailed report.

> **Warning**: The Campaign Entry and Campaign Membership reports in the Activity Log on the contact record are currently not available for clients with more than 4000 campaigns. An error message is displayed when accessing these reports.

- **Scoring**: This tab shows lead scoring information for this contact. You can double-click a lead score to drill down to a detailed report of the lead score history for the selected scoring model. You can view lead score history for the last year. Learn more about lead scoring.
- **Linked Records**: This tab shows linked custom objects and custom object records for this contact. Learn more about Learn more about custom objects.
- **Authenticated Access**: If you use authenticate microsites, this tab shows the authenticated microsites the contact has been added to.
- **Most Engaged Time**: If you use Eloqua Advanced Intelligence Cloud Service, this tab displays the contact's top 3 most engaged day and time combinations. This information can be useful for passing on to your sales team for specific leads, or if you need to compare a contact's activity log to their most engaged times. The *Most Engaged Time* is displayed in your time zone.

Note: You can also view the contact's activity using Profiler. To view the contact record in Profiler, click **Launch in Profiler**. Learn more about Profiler.



4. When you are finished viewing the record, click **Cancel** to close the window.

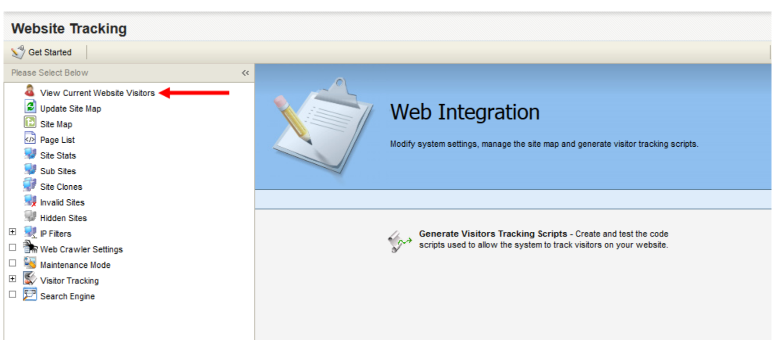
Linking contacts with website visitors

You can manually link website visitors with contacts in your database.

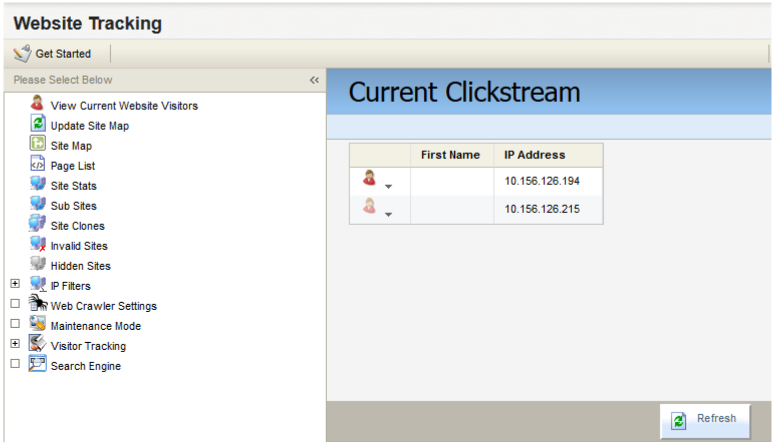
Note: You will require a published web page (such as a landing page) with Eloqua tracking enabled. See Eloqua asynchronous tracking scripts and microsites for more information on website tracking.

To manually link a contact with a website visitor:

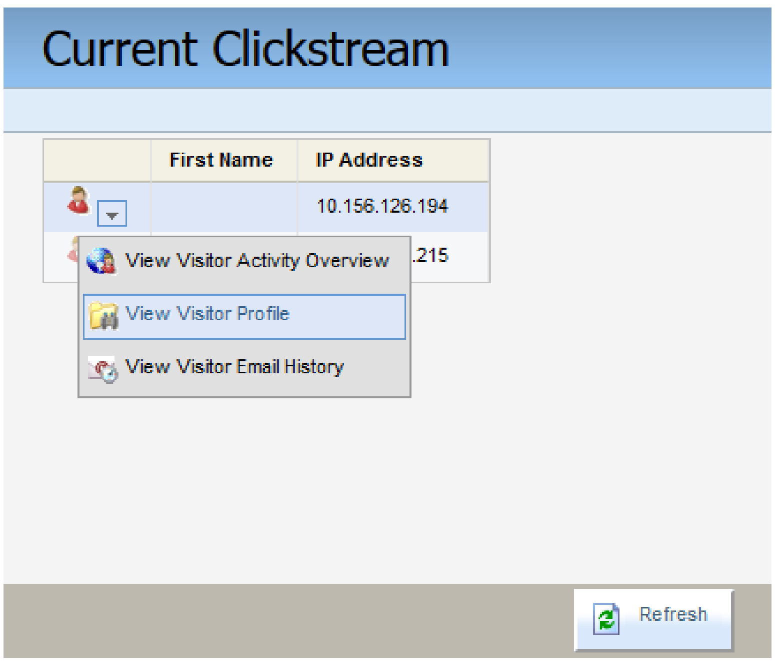
1. Navigate to **Assets** > **Website Setup**, then click **Tracking**.
2. Click **View Current Website Viewers** in left panel.



The *Current Clickstream* opens in the right panel, displaying a list of any recent visitors to web pages that have tracking enabled in Eloqua.

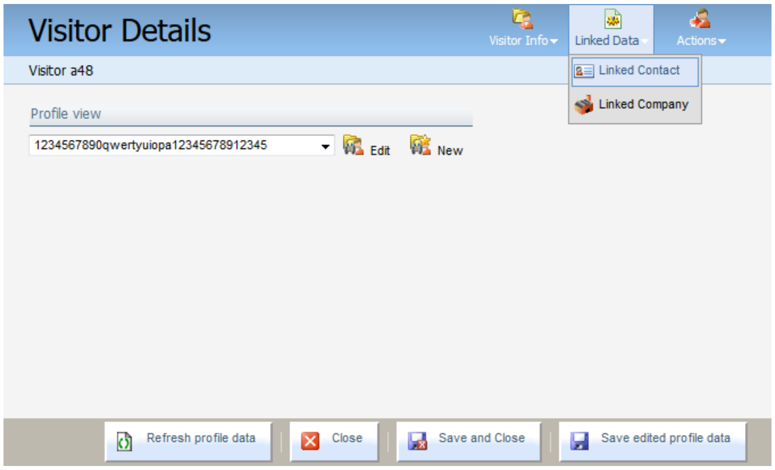


3. Click the drop-down arrow next to a visitor, then click **View Visitor Profile**.



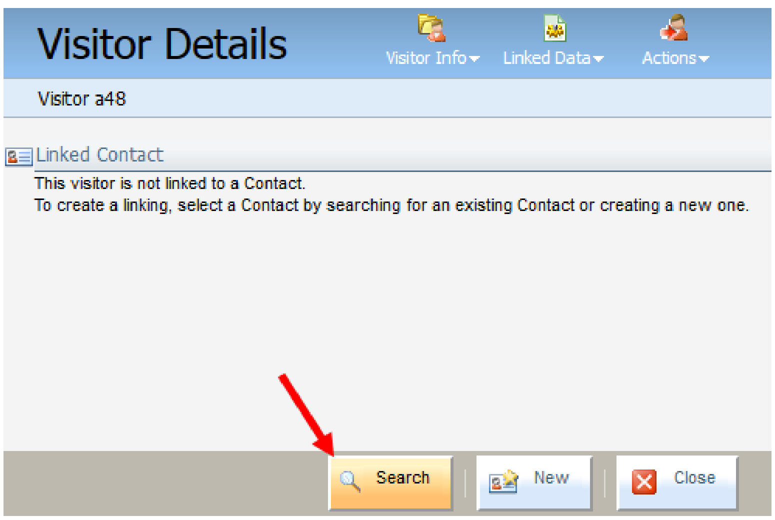
The *Visitor Details* menu opens in a new window.

4. Click **Linked Data** in the upper-right corner of the window, then click **Linked Contact**.



If the visitor is not already linked to a contact, a message will say this on the *Visitor Details* page.

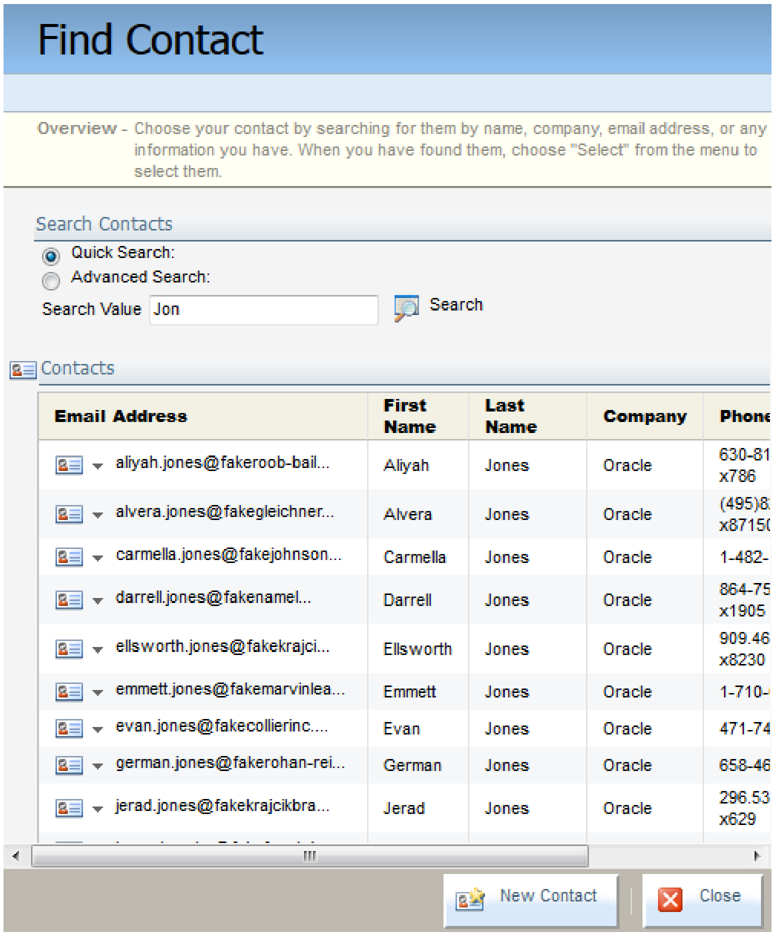
5. Click **Search**.



The *Find Contact* search window opens.

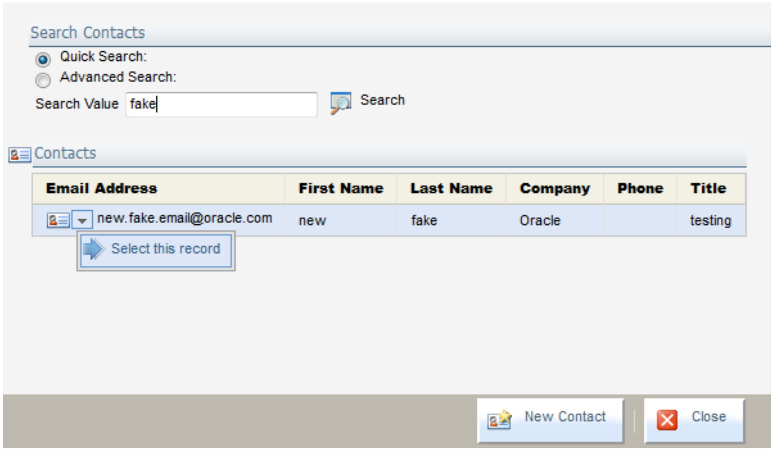
6. Select a search type. Your options are:

   - **Quick Search**: Type a string of letters or numbers corresponding with a contact's field values into the *Search Value* field, then click **Search**. For example, search using a contact's *First Name*, *Last Name*, or *Email Address*.

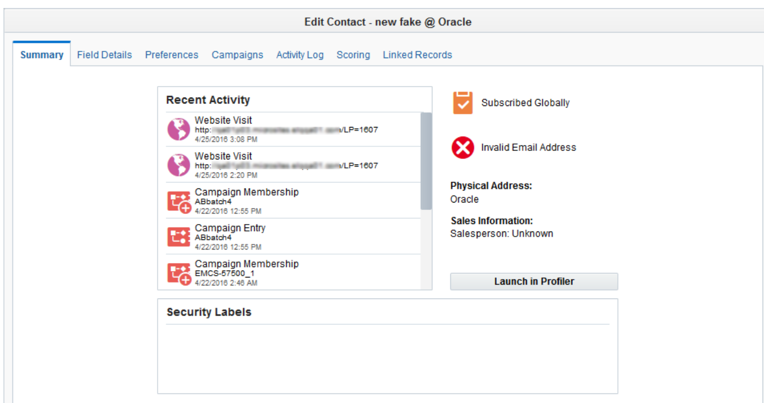


- **Advanced Search**: Select a specific field from the *Contact Field* drop-down, then select whether the search *Is* or *Is Not Equal To* or *Between* the search criteria values. Then type the criteria into the *Search Value* field, and click **Search for Contacts**.

7. Locate the desired contact from the search results, click the drop-down arrow next to that contact, then click **Select This Record**.

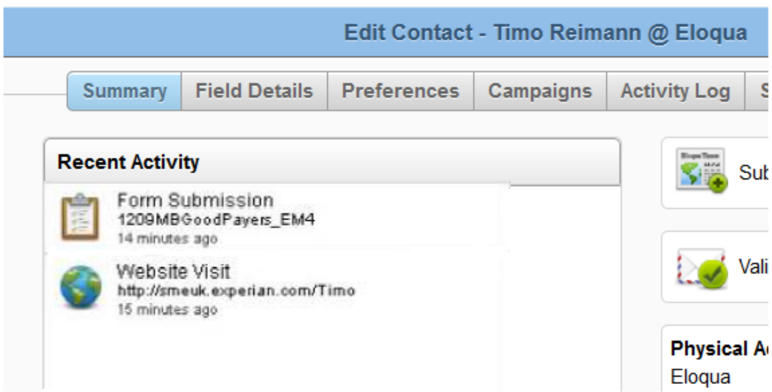


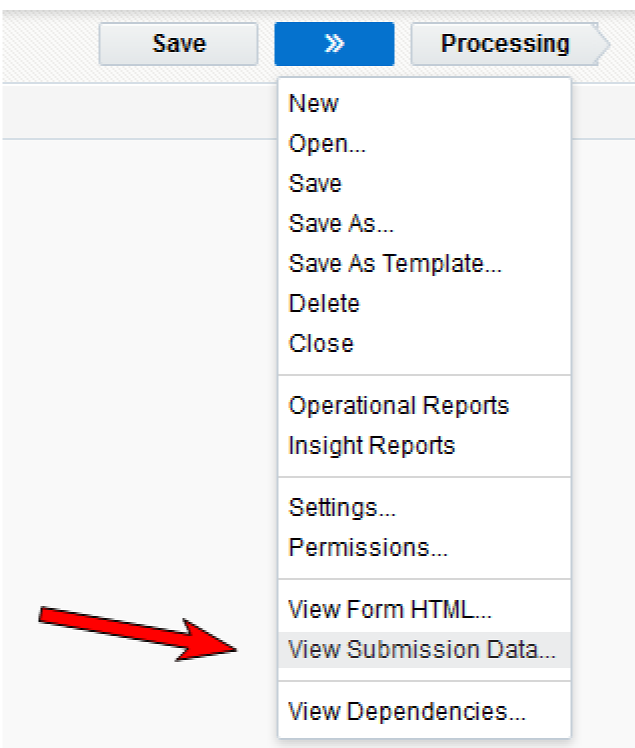
The visitor information is linked with the selected contact record. You can open the contact record and see the website visit as recent activity.



Profile confusion

Profile confusion is actually not an issue that is specific to Eloqua itself. It is based on the general limitations that come with tracking implicit visitor information on the internet. The contact's form activity history (captured in the contact record activity log) and the actual data that is entered in the form (which is captured via the form submission itself) are referencing two completely different tables.





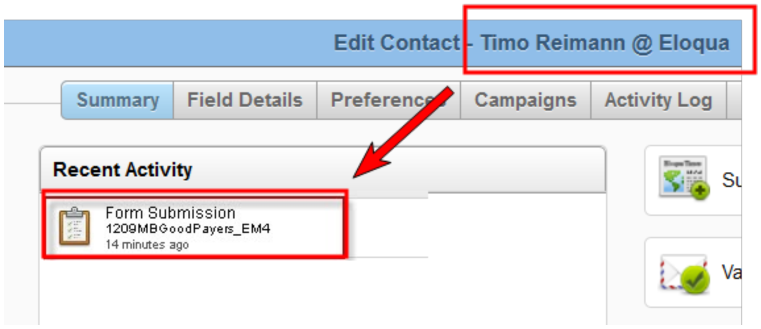
Contact form activity

A contact's form activity (and other web based activity) is pulled from the visitor/profile table, which is referred to as "implicit" data. It implies or assumes that the current cookie profile that is tied to a user's most recent web session should be linked to the matching contact record if a record already exists.

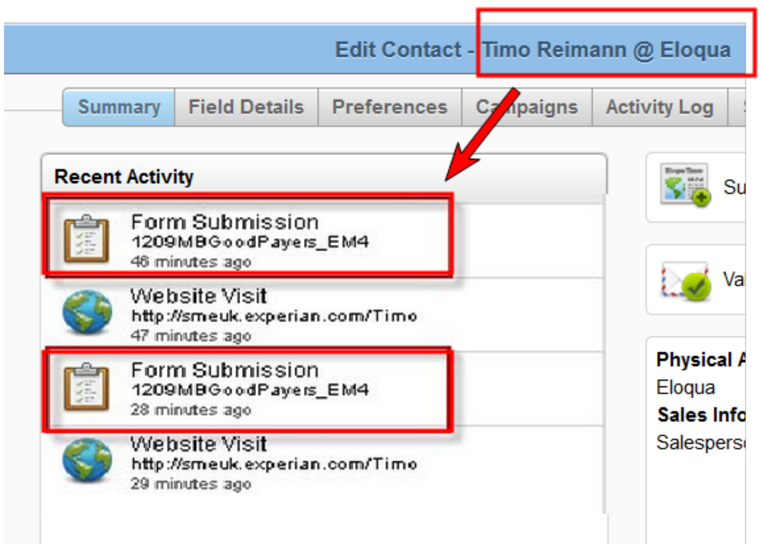
So, if the current cookie profile (on my local computer) is '**timo.reimann@eloqua.com**', and I submit a form, Eloqua will assume that my activity should be tied to the matching contact record (**timo.reimann@eloqua.com**), regardless of what email address I entered in the form submission. When the form gets submitted, Eloqua will do a look-up for that email address on the contact table, and if the record is found, a profile-to-contact linkage will generally be made.

Now, if I should submit the same form again, but this time with a different email address (i.e. **timo.reimann@gmail.com**) and without clearing my browser cookies first, the activity will still be associated to my original contact record (**timo.reimannn@eloqua.com**) instead of the newly created contact record (timo.reimann@gmail.com). This is because the former contact record is what matches my current browser profile, which to this point, has not been changed or cleared from the browser. It is important to note that a profile-to-contact linkage works on a 'one-to-many' relationship: A contact can have multiple profile associations, but a single profile can be linked to only one contact.

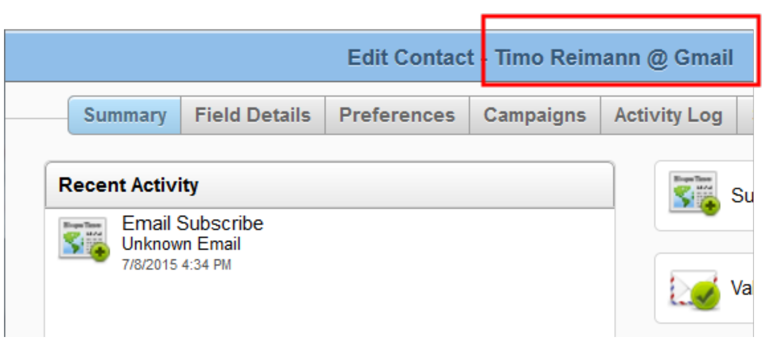
1. **First Form submission with email address '**timo.reimann@eloqua.com**' is linked to the '@eloqua' contact record:**



2. Second Form submission with email 'timo.reimann@gmail.com' is linked to the same '@eloqua' contact record:



3. The newly created '@gmail' contact record has no Profile linkage, and therefore, no form submission activity:



Form submission data

The data in the *Form Submission Data* report, on the other hand, is captured from the form itself, which is referred to as 'explicit' data - the data that is provided to Eloqua explicitly by the contact or visitor, captured through the form fields. Taking the same example noted above: We confirmed that after submitting the same form a second time with the '**timo.reimann@gmail.com**' address, the activity would still get linked to the '**timo.reimannn@eloqua.com**' contact record. If you look at the *Form Submission Data* report, however, you would see the '**timo.reimann@gmail.com**' address in the report table, not '**timo.reimann@eloqua.com**'. This is because the form data is explicit information that was provided to us in the form by the contact directly. The *Form Submission Data* will include ALL form submissions in the report, regardless of the profile association.

1. **First Form submission with email address 'timo.reimann@eloqua.com':**

Form Submission Data

First Name	Last Name	Company	Email Address	Business Ph
Timo	Reimann	Eloqua	timo.reimann@eloqua.com	4166461502

2. **Second Form submission with email address 'timo.reimann@eloqua.com':**

Form Submission Data

Date	First Name	Last Name	Company	Email Address
02/08/2012	Timo	Reimann	Eloqua	timo.reimann@gmail.com
02/08/2012	Timo	Reimann	Eloqua	timo.reimann@eloqua.com

In summary, the Visitor Table (in this case the Form Activities log) should not be confused with the 'Contact' or 'Form Data' tables.

How does profiling work?

Profile data is pulled from the visitor's cookie information, in the case of a form submission, the Eloqua cookie will pull the aggregated visitor/profile information from the current session, and will then attempt to associate that profile to a contact record. If the current cookie session is associated to a different profile or if the browser cookies are disabled, it will mean one of two things:

1. In the case of former, the form activity is linked to a different contact record.
2. In the case of the latter, no profile association is made whatsoever.

Given the former scenario, it is possible that the form activity could be associated to a different contact record, if the look-up finds an existing email address that matches the current profile. This often happens when the form submitter has more than one Eloqua contact record or is testing with multiple email addresses. To get around this, the user would need to clear their browser cookies completely and start a new session. Alternatively, they could run multiple browsers with different cookie profiles (one browser for each profile).

Why is my contact missing profile activity?

There are a number of reasons why you may not see form activity (or other types of Profile related activity) in the Contact Activities log:

1. The visitor (who submits the form) may be associated to a profile that does not match the email address. In other words, the aggregated email address from the cookie profile may be different from the email address that was actually submitted in the form. For example:
   - The contact or visitor may submit the form with their personal email address, but the cookie session is associated to their work address. This can happen when two or more users share the same computer
   - The contact or visitor may be submitting the form on behalf of another person or is submitting back to back forms with different email addresses.
   - The contact or visitor has more than one Eloqua contact record and/or is testing with multiple email addresses.
2. The visitor could have their browser cookies or javascript disabled, in which case no profile information can be tracked whatsoever. It is also possible that the user's company laptop could have other custom security restrictions that prevent cookie tracking.

Contacts without an email address

Important: This feature is currently released under our Controlled Availability program. To request access to this feature, please log in to My Oracle Support (https://support.oracle.com) and create a service request. Note that access to this feature is not guaranteed and will be evaluated based on customer needs.

With Oracle Eloqua you can create and update contacts without an email address by using an alternative unique match identifier. It is important to note that while you can have contacts without an email address, you must ensure that the identifier that you use is unique to that contact.

Contacts without an email address frequently asked questions

Important: This feature is currently released under our Controlled Availability program. To request access to this feature, please log in to My Oracle Support (https://support.oracle.com) and create a service request. Note that access to this feature is not guaranteed and will be evaluated based on customer needs.

Will this be available to all trims?

Yes, this is available to customers on all trims (Basic, Standard, Enterprise).

Will this feature be enabled by default for my Oracle Eloqua instance?

No. Please speak with your account director for more information, as enabling this capability may have implications to your current CRM integration and Oracle Eloqua subscription. Once completed, you can log a Service Request ("SR") with Oracle Eloqua Product Support via My Oracle Support (support.oracle.com).

Will contacts with no email address count against my contact band limit?

Yes. Since the primary use case for storing contacts with no email address in Oracle Eloqua is execution through a variety of non-email channels enabled through the AppCloud (SMS, Direct Mail, and so on), they are still actionable and marketable.

What happens if I use CRM ID as my unique identifier and my input file has duplicate CRM IDs?

As long as there are no duplicate CRM IDs assigned to your contacts, during upload the system will try to deduplicate the duplicate rows and update the corresponding contact record.

What happens if I choose to uniquely match on first name, but there are multiple contacts that have the same first name?

The data being updated will be rejected and not processed since you've violated your uniqueness constraint.

Is there a way to globally set a unique identifier versus picking it each time?

No, currently you are required to specify your unique ID each time you update data in the database whether it is through a list upload, CRM synch, or data import. This capability is being considered for a feature enhancement in a future release.

For contacts that do have an email address, does it still have to be unique or can I have multiple contacts with the same email address?

Email addresses must still be unique.

Can I use different unique IDs each time I update contact data in the application?

Yes, users can select email as the unique ID and easily change to a different unique ID, for example CRM ID. However, you are responsible for ensuring that they adhere to the uniqueness constraint. If you decide to use *First Name* as the unique ID and there are 100 contacts with the same first name (for example "John"), Oracle Eloqua will not know which one of the records to update and therefore the update will fail.

Scenario: Jim is a contact with no email address. Jim subsequently submits a form that includes his email address. Does the form submission update the no email address contact record or does it create a new contact, one for Jim with no email and one for Jim with email?

This depends on how the contact is arriving at the landing page from the form. If the contact organically visits the landing page and submits a form, there is no unique identifier on which to match. In this case, a new contact will be created. However, it is likely that another unique identifier will be present, for example a phone number, to facilitate marketing communication if an email address does not exist. This identifier can be selected in a form processing step to look up contacts in the database and update with form data. In this scenario, using the phone number you could find Jim's existing contact record and update it with the new email address from the form.

How do contacts with no email address affect subscription management?

Initially, contacts with no email address are globally unsubscribed. Beyond that if there is an activity that drives them online (for example, a direct mail with PURL) and there is a form submission then their subscription preferences are processed as usual. Note that in the absence of an email address, access to manage subscriptions preferences on an individual contact record is hidden from view.

If I am uploading new contacts using list upload, can I select *Eloqua Contact ID* as the unique match field?

No, *Eloqua Contact ID* cannot be selected as the unique match field for new contacts. However, if you are uploading information to update existing contact records, the *Eloqua Contact ID* can be selected.

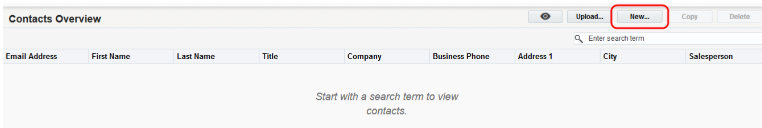
Creating contact records without an email address

Note: We're updating our help center to reflect the new Redwood experience. During the transition, some content reflects the previous version of the UI.

With Oracle Eloqua you can create a record for a contact even if you do not have an email address for them.

To create a contact record without an email address:

1. Navigate to **Audience**, then click **Contacts**.
2. Click **New** in the upper-right corner.



3. In the *Field Details* tab, enter the information that you have for the contact in the corresponding fields, then click **Create**.

A new contact record is created with the information provided.

Creating contact records without an email address using data import

Important: This feature is currently released under our Controlled Availability program. To request access to this feature, please log in to My Oracle Support (https://support.oracle.com) and create a service request. Note that access to this feature is not guaranteed and will be evaluated based on customer needs.

With Oracle Eloqua you are able import contact information using the *Data Export and Import* feature of the application. This allows you to create contacts even without a valid email address.

To create contact records without an email address using data import:

1. Navigate to **Audience** > **Tools**, then click **Data Export and Import**.

2. Click **Add** in the lower-left corner, then click **New Contact Import**.

3. Configure the import by specifying the required fields in the *Import Settings* tab. Learn more about creating and configuring data imports.

4. In the *Field Mapping* tab, select **CRM ID** from the drop-down list in the *Unique Match On* field.

Once the contact import runs, it will use the unique match field specified to determine whether a new contact should be created or whether an existing one should be updated.

Creating contact records without an email address using CRM auto synch

Important: This feature is currently released under our Controlled Availability program. To request access to this feature, please log in to My Oracle Support (https://support.oracle.com) and create a service request. Note that access to this feature is not guaranteed and will be evaluated based on customer needs.

With Oracle Eloqua you can create contacts using CRM auto-synch, even if you do not have an email for the contact.

To create contact records without an email address using CRM auto synch:

1. Click **Settings**.

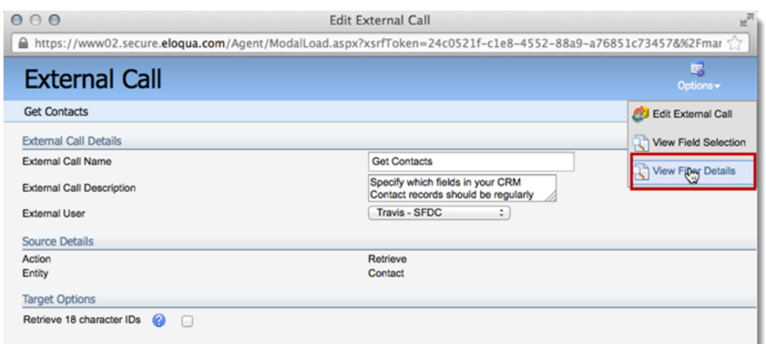
2. Click **Integration** in the *Platform Extensions* area.

3. Click the **Inbound** tab.

4. Locate your data sources for contacts using either the *Quick Search* field or the tree view, then click on the name to view the details.

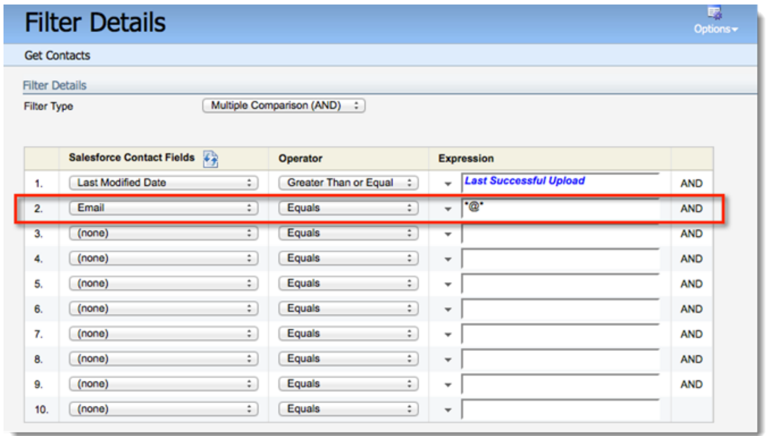
5. In the **Data Upload Source** page you can choose to create a new external call or edit an existing one under the *Default Values for Transfer* section.

6. Click **Options** icon in the upper-right corner, then select **View Filter Details** to open the *Filter Details* window.



7. Select which leads on the CRM are passed through to Oracle Eloqua.

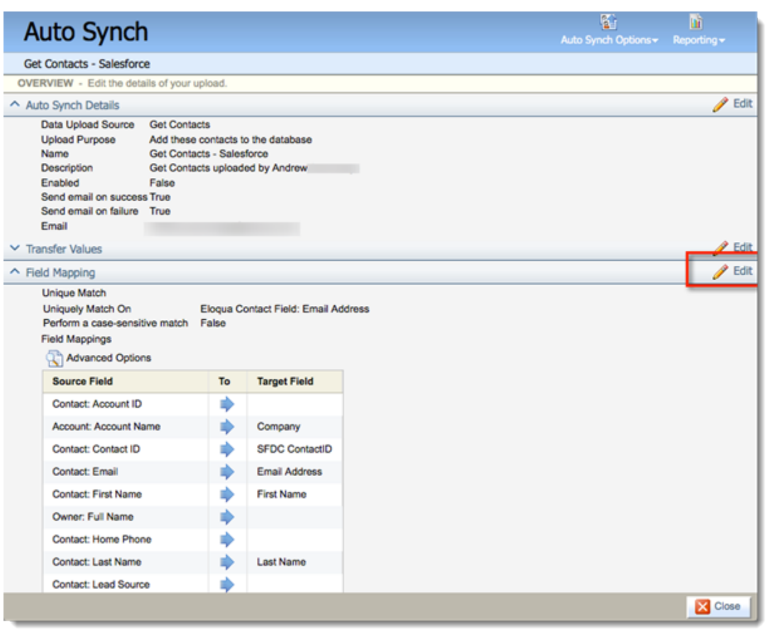
> **Note**: In order to support the integration of contacts with no email address, you must remove any filters that search for a valid email address.



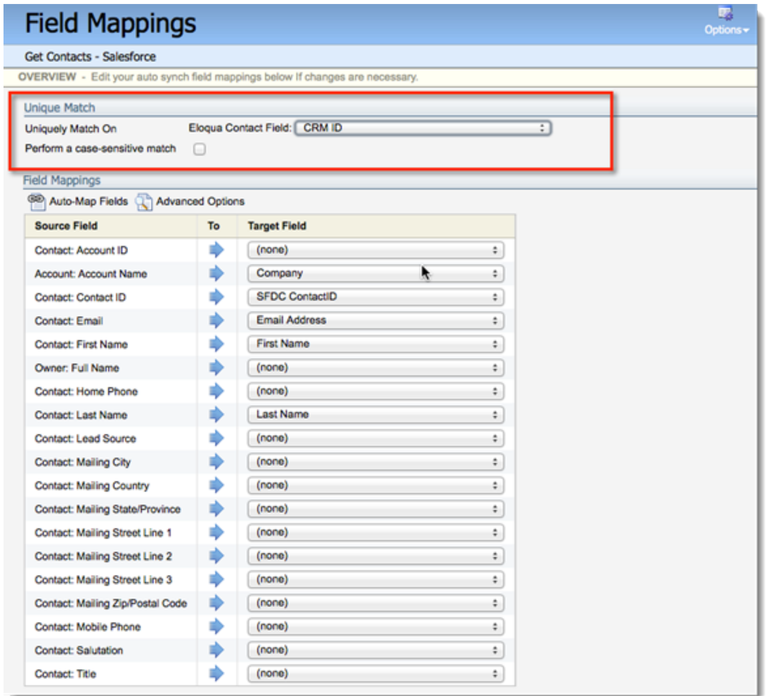
With the filter removed and contacts with no email address flowing into your Oracle Eloqua system, you must decide which unique identifier will be used to match contacts.

8. In the *Inbound* tab, click on the **Management** icon, then select **Auto Synchs** from the drop-down list. Locate the auto synch for your contact integration and click on it to launch the details in a separate window.

9. Expand the **Field Mapping** section, then click **Edit** to open the *Field Mappings* window.



10. From the drop-down list, select the unique identifier that will be used to match contacts.



Creating contact records without an email address using contact list uploads

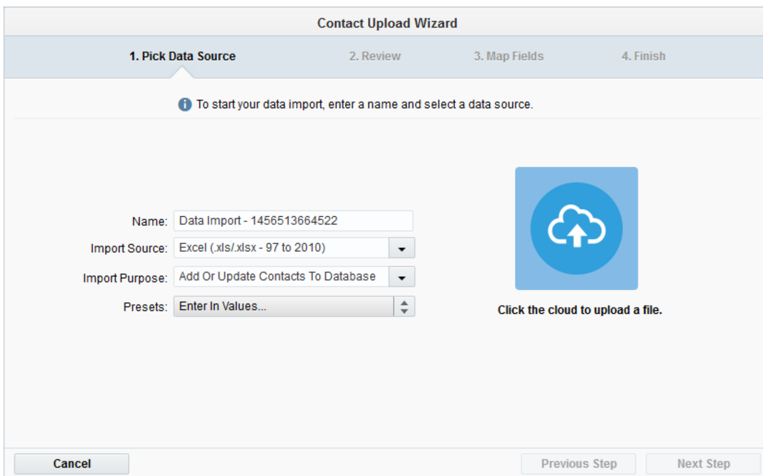
Important: This feature is currently released under our Controlled Availability program. To request access to this feature, please log in to My Oracle Support (https://support.oracle.com) and create a service request. Note that access to this feature is not guaranteed and will be evaluated based on customer needs.

Note: We're updating our help center to reflect the new Redwood experience. During the transition, some content reflects the previous version of the UI.

Oracle Eloqua allows you to upload a list of contacts from an external file using the *Contact Upload Wizard*. You can create a list of contacts without email addresses but with other field identifiers that you can then map to fields in Oracle Eloqua.

To create contact records without an email address using contact list uploads:

1. Navigate to **Audience**, then click **Contacts**.
2. Click **Upload** in the upper right-hand corner to open the *Contact Upload Wizard*.



3. Configure the **Pick Data Source** tab:
   - **Name**: Enter the upload's name into the *Name* field. The default name is **Data Import - *xxxxxxxxxxxxx*** where *xxxxxxxxxxxxx* represents a number assigned to this import in Oracle Eloqua. Give your import a more meaningful name for future reference.
   - **Import Source**: Specify the format of the import data:
     - *Delimited file (Tab, Pipe, Semicolon)*
     - *Microsoft Excel® 97-2010 (.xls or .xlsx)*

Note: You should map each of the fields in the file to match a corresponding field in Oracle Eloqua. For example, have a column labeled *Email Address* in order to map to the *Email Address* field in Oracle Eloqua. This will make your mapping task easier, and will ensure that your contacts are uploaded successfully.

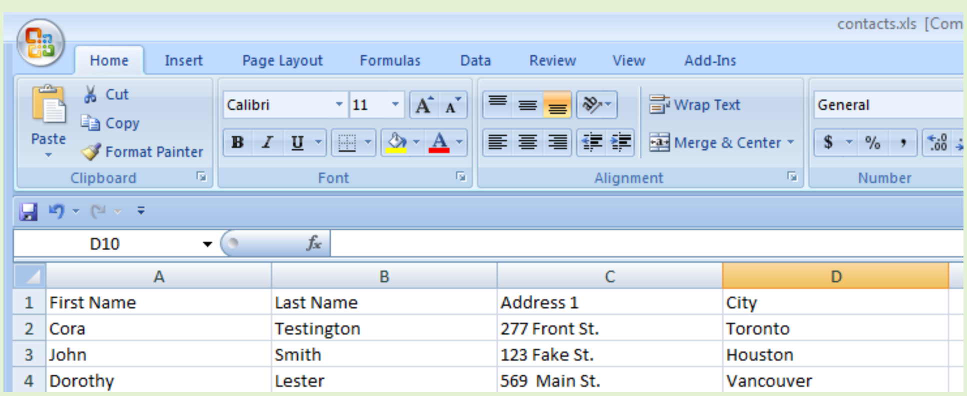
- **Import Purpose**: Select **Add Contacts to Database** from the *Import Purpose* drop-down list.

Note: You can also use this *Contact Upload Wizard* to update contacts already contained in your database, to update their email addresses, mark as bouncebacks, unsubscribe, or delete them.

- **Presets**: Select the preset that you have created, or continue with **No Preset (default)**.

4. Click the cloud icon, then browse to your file.

Note: In your source file there should be a column that can be used as the unique matching identifier for your contacts. For example, "City". The column name should reflect that identifier.



5. Select your file, then click **Open**.

6. Configure the **Review** tab:

   a. Verify that the displayed data matches your source file's configuration.

   b. (**Optional**) If something is inaccurate, click **Previous Step**. Modify your source file, or select another file to begin the process again.

   c. If everything looks correct, click **Next Step**.

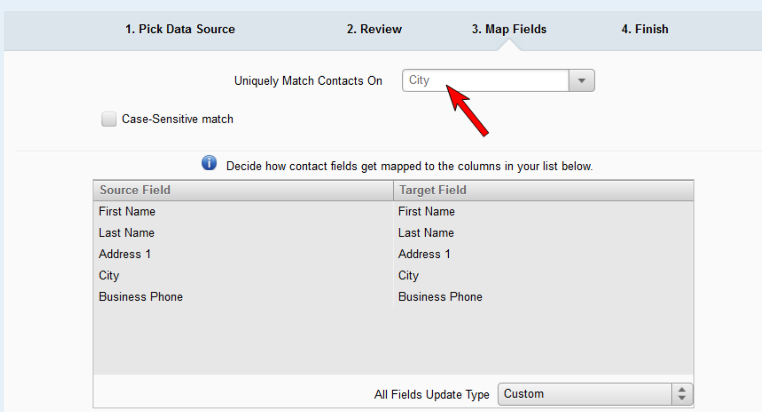
7. Configure the **Map Fields** tab.

   a. Verify that the field names from your source file have been matched with field names in the Oracle Eloqua database. For example, *First Name* maps to *First Name*.

   b. Fix any fields that are not mapped, or that are mapped incorrectly. Double-click on a field, then select a correct matching field from the *Target Field* drop-down menu.

   c. For contacts without an email address, select a field from the *Uniquely Match Contacts On* drop-down list to use as a unique identifier. The table in the window shows the fields from the source file and the target fields to which they correspond, these are the fields that can be selected from the drop-down list.

Example: In the following image, the *City* field is used to uniquely match contacts.



Note: *Eloqua Contact ID* cannot be selected as the unique match field when creating new contacts, however, it can be used to update the records of current contacts.

   d. Click **Next Step**.

8. Configure the **Finish** tab:

   a. (**Optional**) Enter the email address to which you want a confirmation sent after uploading.

   b. (**Optional**) Select **Place Contacts into a Shared Contact List** to add a list of your contacts to your database for future use. Either create a new list in a specified root folder, or select **Use Existing** to update an existing list.

   Example: If you are uploading a list of names of attendees at a recent trade show, you can reuse this list for later campaigns without having to manually create a shared list. You can place the contacts into a new list or add them to an existing one by selecting the respective option.

   c. Click **Finish** to complete the import. the wizard closes and the contacts from the file are added to Oracle Eloqua. A confirmation email is sent to the address specified in step 4 of the wizard.

All contacts without an email address will be successfully uploaded and matched based on the unique identifier that you specified. If an email address was specified in Step 8, then a confirmation email is sent to that address.