Oracle CX Sales Integration App

User Guide

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Oracle CX Sales Integration app

Important: *Oracle Sales* was formerly known as *Oracle Sales Cloud*. All instances of Oracle Sales Cloud have been changed to Oracle Sales across the app user interface.

The Oracle CX Sales Integration app creates an integration between Oracle Eloqua and Oracle CX Sales to send data between the two platforms. Leverage the Oracle CX Sales Integration app in your marketing cloud solution to:

- Transfer the leads generated from marketing campaigns in Oracle Eloqua into Oracle CX Sales so they are nurtured and synchronized as sales leads.
- Use the app within a program or campaign canvas to create or update records in supported Oracle CX Sales objects in real time. Typical use cases include lead creation, lead updates, and contact updates.
- Schedule imports from Oracle CX Sales to Oracle Eloqua for supported Oracle CX Sales objects.

There are various use cases where the app could be used for marketing qualification processes and lead generation.

Example: A listener step could be configured to listen for contacts who complete a form. Once the contact is added to the program canvas, you may want to decide to create a lead for the contact, depending on the next decision, you can configure this app to either create a new lead or update an existing lead within Oracle Eloqua.

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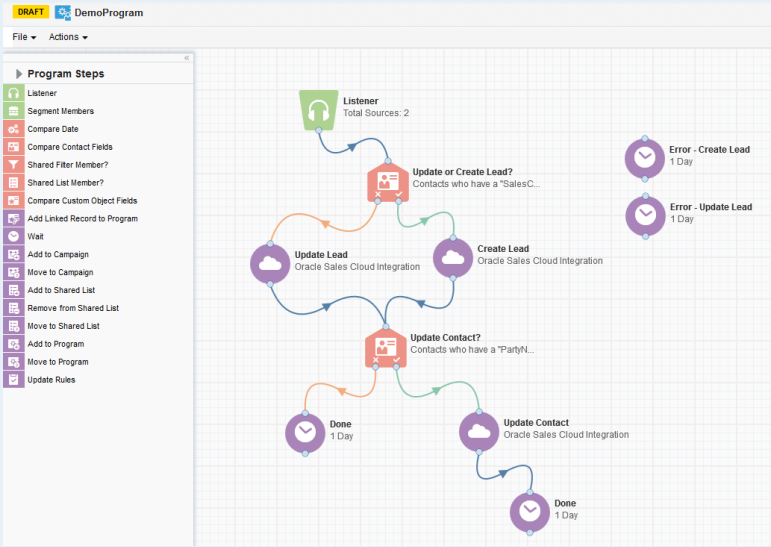

You can manage user permissions on this app by following the instructions listed here.

Supported Oracle CX Sales objects

The integration supports bi-directional data flow for the objects listed below. This means data may be transferred both to and from Oracle Eloqua or Oracle CX Sales for these objects. The typical use of this app is to import data in these objects to Eloqua, and to create leads and update contacts in Oracle CX Sales. Currently, the Oracle CX Sales Integration app supports the following objects:

- Activity
- Campaign
- Campaign member
- Deal registration
- Opportunity

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- Partner
- Partner Contact
- Products
- CX Sales account SDO
- CX Sales contact SDO
- CX Sales household SDO
- Sales lead
- Top level custom objects

Download the Oracle CX Sales Integration App User Guide.

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Getting started with the Oracle CX Sales app

Important: *Oracle Sales* was formerly known as *Oracle Sales Cloud*. All instances of Oracle Sales Cloud have been changed to Oracle Sales across the app user interface.

The steps below outline the recommended setup and configuration process for the Oracle CX Sales Integration app.

1. Prior to installing the app, create contact and account fields which will be used to map Eloqua fields to Oracle CX Sales fields when configuring and using the app. These fields will be used in the Connections area to specify which Eloqua fields are to be used for matching with Oracle CX Sales fields.
2. Install the Oracle CX Sales Integration app. Once the app is installed, configuration settings for connections, actions, imports, and notifications can be found in the apps list. Go to **Settings** > **Apps** and click **Configure** to access the configuration settings.
3. In Eloqua, click the *cloud menu* icon on the right hand side to expand the *Apps* list and select **Oracle CX Sales Integration**. The *App Configuration for Oracle CX Sales Integration* page is displayed.
4. Configure your CRM connections. Each CRM system can have multiple connections, including alternate credentials or sandbox configurations. Only one connection can be active per CRM system.
5. If you have an existing native Oracle CX Sales integration, you can migrate its assets to the Oracle CX Sales Integration app.

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6. Create default assets for the connection to automatically create actions and imports. Alternatively, you can create actions and imports by manually configuring them as described in the following steps.

7. Create actions (data transactions) between Oracle Eloqua and Oracle CX Sales.
    - Use step actions to create and update records to be used in a program or campaign.
    - Use campaign actions to send campaign updates from an Oracle Eloqua campaign object to a custom object in Oracle CX Sales. One campaign update action can be active at a time.
    - Use response actions to send data to Oracle CX Sales based on response rules configured in your Oracle Eloqua instance. When a response occurs, Oracle Eloqua records the response based on priority and the response is sent to Oracle CX Sales.

    > **Important**: The response actions feature is currently released under our controlled availability program. To request access to this feature, please log in to My Oracle Support and create a service request.

8. Create and schedule imports to import data from Oracle CX Sales to Oracle Eloqua periodically. The Oracle CX Sales Integration app executes imports every 15 minutes. If an import needs to be performed off schedule, it can be executed on demand.
    - Use standard imports to import contact record data from Oracle CX Sales into Oracle Eloqua. The following imports are recommended: get leads, get contacts, get accounts.
    - Use campaign imports to import custom object data from Oracle CX Sales into Oracle Eloqua campaigns to allow for bi-directional updates between the two applications.

9. Setup email notifications to be alerted if there are problems with your imports or actions.

10. Review your reports. The Oracle CX Sales Integration app provides reporting on the records being synced between Eloqua and Oracle CX Sales to provide insight into how your syncs are performing.

11. Use the app in a campaign or program to update or create contact records. View recommended programs here.

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12. Add imports to a canvas to run up to ten post processing actions.

Creating recommended contact and account fields

> **Important**: *Oracle Sales* was formerly known as *Oracle Sales Cloud*. All instances of Oracle Sales Cloud have been changed to Oracle Sales across the app user interface.

Before installing the Oracle CX Sales Integration app, we recommend that you first create contact and account fields which will be used to map Oracle Eloqua fields to Oracle CX Sales fields when configuring and using the app. These fields will be used in the Connections area to specify which Oracle Eloqua fields are to be used for matching with Oracle CX Sales fields.

To create the recommended fields:

1. Create contact fields and account fields. The following table outlines how these fields will be used in the app and provides suggested names for each field.

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Eloqua Object	Eloqua Field Name*	Field Purpose (Oracle CX Sales ID)
Contact	**OSC - Lead Identifier**	**Lead Identifier (LeadId)**
	OSC - Contact Registry ID	**Registry ID (PartyNumber)**
	OSC - Contact Party ID	Party ID (PartyId)
	OSC - Account Registry ID	Related Account Party Number (AccountPartyNumber)
	OSC – Account Party ID	Related Account Party Id (AccountPartyId)
	OSC - Contact Primary Address Number	Site Number (PrimaryAdress.AddressNumber)
Account	**OSC - Account Registry ID**	**Registry ID (PartyNumber)**
	OSC - Account Party ID	Party ID (PartyId)

**Suggested field name*

The fields in bold in the table above are to be used in the Connections area to specify which Oracle Eloqua fields are to be used for storing Oracle CX Sales identifiers. The values in these fields are used to identify existing records in Oracle CX Sales when performing an update, and to store the ID value from Oracle CX Sales when performing a create.

Important: Account linkage in Oracle Eloqua should be configured to use the Account Registry ID/Party Number field on both the account and contact. Any account import in the integration must be set up to uniquely match on the account field configured in account linkage.

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Installing the Oracle CX Sales Integration app

Important: *Oracle Sales* was formerly known as *Oracle Sales Cloud*. All instances of Oracle Sales Cloud have been changed to Oracle Sales across the app user interface.

Important: Because deleting or deactivating the installer user account will impact installed apps, we recommend installing apps using a user account that is not tied to a specific person. The user account must have customer administrator rights.

To install the Oracle CX Sales Integration app:

1. Follow the URL provided:

   https://cloudmarketplace.oracle.com/marketplace/app/AppOracleCXSales

   Note: If you have IP allowlists enabled, add internal Eloqua IPs to your allowlist .

2. Log in with your Eloqua credentials, if required.
3. Click **Accept and Install** to add the app to your *Apps* list.
4. Click **Sign In**.
5. Confirm your credentials and click **Accept** to grant permission for the app to communicate with Oracle Eloqua on your behalf.

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The app is now installed and can be viewed in your *Apps* list (**Settings** > **Apps**, under the *Platform Extensions* section). You can configure your app now or at a later time.

You can return to the *Apps* list at any time and view the app description, modify the configuration settings, reinstall, or uninstall it. You can also check its status and dependencies.

Warning: To modify configuration settings, navigate to *Apps*, select your app, and click the **Configure** icon. Selecting the **Reinstall** icon will force you to go through the entire configuration process again. The app will be unavailable for all users during the reinstall. All existing assets, configurations and history are preserved when you reinstall an app. Also, you can choose to delete an app by clicking the **Uninstall**. In this case, all current assets, configurations, and history are permanently deleted.

Configuring connections

Important: *Oracle Sales* was formerly known as *Oracle Sales Cloud*. All instances of Oracle Sales Cloud have been changed to Oracle Sales across the app user interface.

The *Connections* page in the Oracle CX Sales Integration app lists all of your CRM connections and associated credentials.

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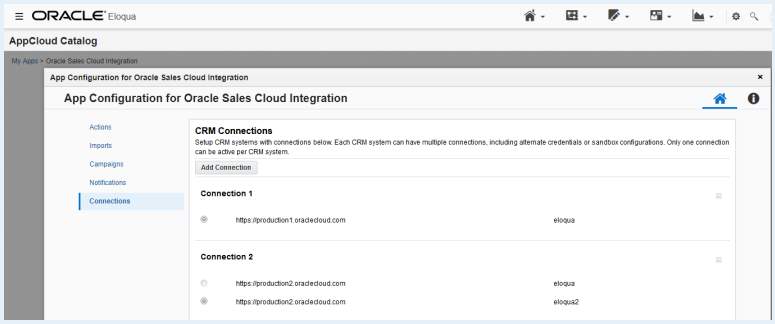
Example: You may want to have two sets of connections. One connection may have one set of credentials, while another connection has two credentials (one set of credentials could be linked to a sandbox or test environment and the other could be production credentials).



To configure connections:

1. In Eloqua, click the *cloud menu* icon on the right hand side to expand it. This menu is located on the My Eloqua Dashboard, landing page editor, email editor, and campaign canvas.
2. From the *Apps* list, click **Oracle CX Sales Integration**. The *App Configuration for Oracle CX Sales Integration* page is displayed.
3. In the Oracle CX Sales Integration app, click **Connections**.
4. Click **Add Connection**.

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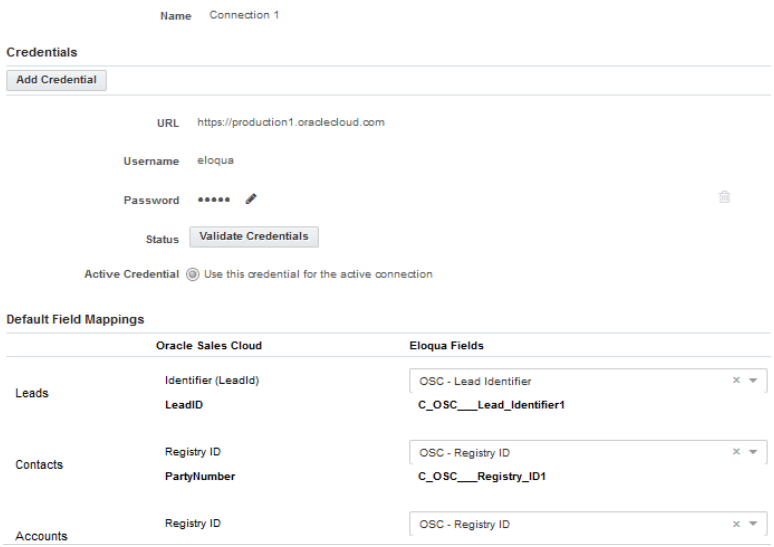
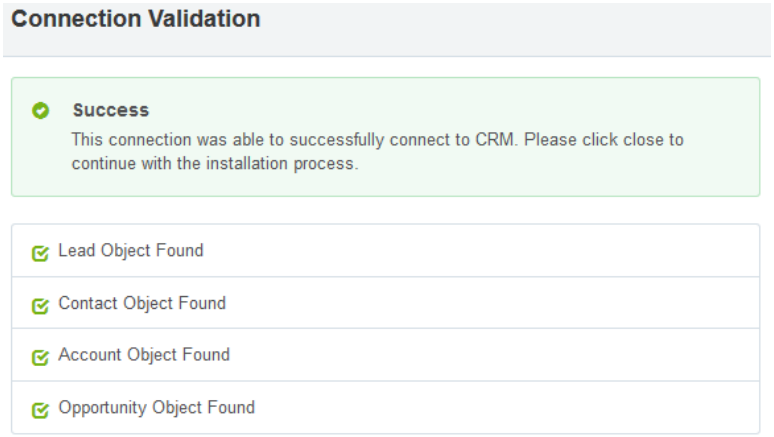
5. Complete the connection details:



   a. **Name**: Enter a unique name for the connection. Connections cannot be renamed. The connection name will included in the name of any default actions, imports, and programs.

   b. Add one or more credentials:
      - **URL**: Enter the URL for the CRM connection.
      - **Username**: Enter user name credentials for the connection.
      - **Password**: Enter password credentials for the connection. Click **Show Password** to display the characters in the **Password** field. Click **Validate Credentials** to verify that proper access to Oracle CX Sales is available. Click the resulting **Valid** or **Invalid** status message to view details.



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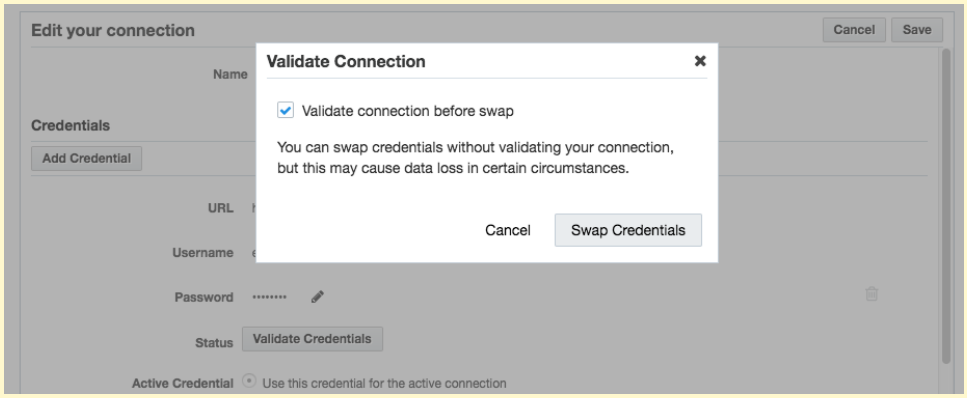
Note: In order for a credential to be added, deleted, or set to default, the connection must first be saved for the change to persist.

c. Activate one credential for the connection by selecting the **Active Credential** radio button.

Important: When editing your connection and activating a different credential, you are given an option whether to validate credentials before swapping. The validation option is recommended and selected by default. If the validation option is not selected, the credential swap occurs instantly and the imports and actions are not disabled, which may result in action and import errors.



d. **Default Field Mappings**: Select the Eloqua fields to map to the corresponding CX Sales Unique Identifier fields.

- **Leads**: Select an Oracle Eloqua field to map to the Lead Identifier field for Oracle CX Sales contacts.
- **Contacts**: Select an Oracle Eloqua field to map to the Registry ID field for Oracle CX Sales contacts.
- **Accounts**: Select an Oracle Eloqua field to map to the Registry ID field for Oracle CX Sales accounts.

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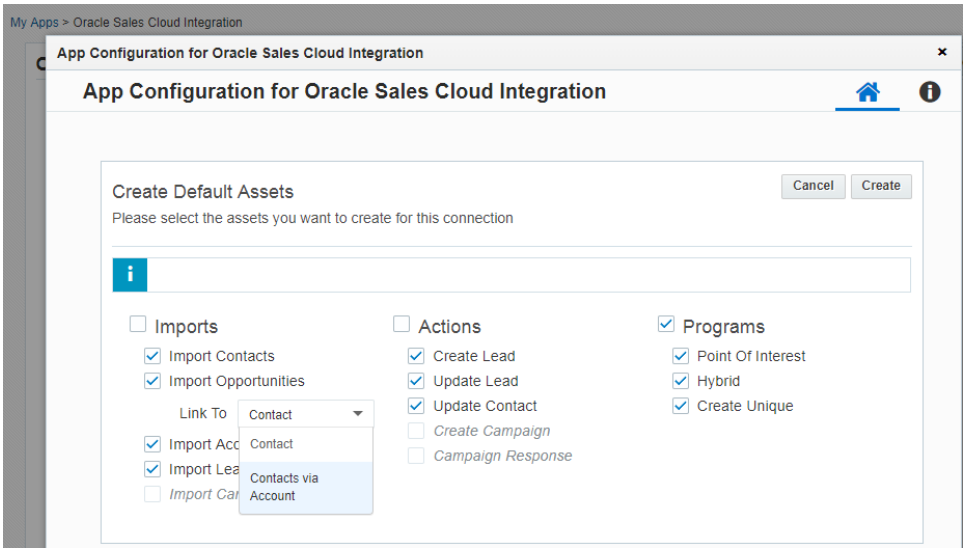
6. Click **Save**. The *Create Default Assets* page is displayed.



7. Select the actions, imports, and programs that you want to create. For more details, see creating default assets.

8. Click **Create**. Selected default imports, actions, and programs are created with a name that includes the name of your connection. The imports are created in the disabled state and actions are created in the enabled state. To enable or disable them, go to the *Imports* or *Actions* tab and click the corresponding menu icon . If you selected default programs, a message displays the folder where you can find them.

Modifying a connection

To modify an existing connection:

1. In the Oracle CX Sales Integration app, click the **Connections** tab.

2. Click the connection's menu icon and select any of the following options:
   - **Create Action**: Click to create an action and automatically associate it with the current connection.
   - **Create Import**: Click to create an import and automatically associate it with the current connection.

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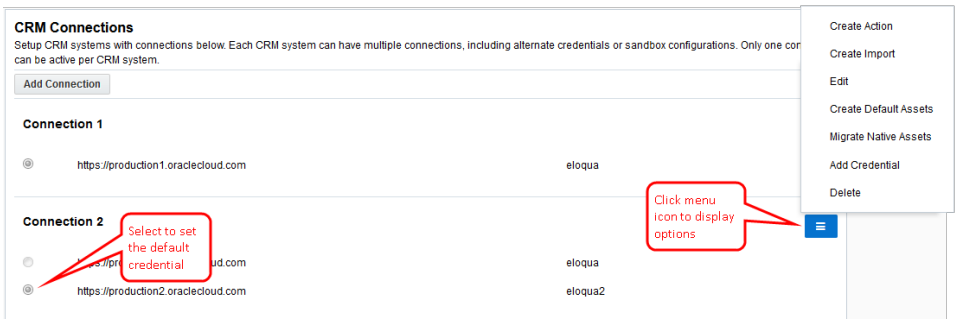
- **Edit**: Open the connection in Edit mode so that you can add, modify, or delete a credential and modify its field mappings. You cannot modify the name of a credential.
- **Create Default Assets**: Create default imports and actions if you did not already do this as part of the connection set up.
- **Migrate Native Assets**: Run the migration wizard to automatically migrate assets from your native Oracle CX Sales integration.
- **Add Credential**: Open the connection in Edit mode so that you can add, modify, or delete a credential and modify its field mappings.
- **Delete**: You can delete connections if there are no associated actions or imports. A confirmation dialog will list any dependencies. The dependent actions and imports need to be disabled and deleted before deleting the connection.



3. If a connection has multiple credentials, you can select the radio button to set the default credential. Only one credential per connection can be active at once.

Creating default assets

Important: *Oracle Sales* was formerly known as *Oracle Sales Cloud*. All instances of Oracle Sales Cloud have been changed to Oracle Sales across the app user interface.

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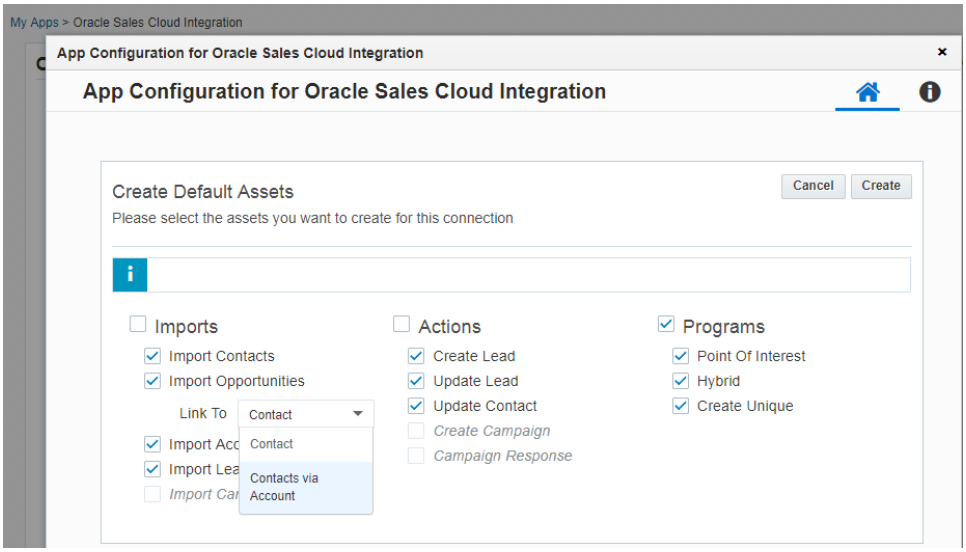
Once you configure a connection, the *Create Default Assets* page offers to automatically create default actions, imports, and programs using default mappings. You can alternatively create actions, programs, and imports by manually configuring them.

To create default assets:

1. In the Oracle CX Sales Integration app, click **Connections**.
2. Do one of the following:
   - For a new connection, click **Add Connection**, configure a connection, and click **Save**.
   - For an existing connection, click the connection's menu icon and select **Create Default Assets**.

   The *Create Default Assets* page is displayed.



3. Select any of the imports, actions, and programs that you want to create.
   - **Imports**: Selects all of the following imports.
     - **Import Contacts**
     - **Import Opportunities**: If you select this option, you can optionally link opportunities to contacts directly or to contacts via accounts.
     - **Import Accounts**

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        - **Import Leads**
        - **Import Campaigns**
    - **Actions**: Selects all of the following actions.
        - **Create Lead**
        - **Update Lead**
        - **Update Contact**
        - **Create Campaign**
        - **Campaign Response**
    - **Programs**: Selects all of the following to create a program canvas for each:
        - **Point Of Interest**
        - **Hybrid**
        - **Create Unique**

> **Note**: If an object is not enabled in your Oracle CX Sales account, you cannot select it on the *Create Default Assets* page. For example, support for Oracle CX Sales campaign imports and actions 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.

4. Click **Create**. The default actions, imports, and programs are created with a name that includes the name of your connection. The imports are created in the disabled state and actions are created in the enabled state. To enable or disable imports or actions, go to the *Imports* or *Actions* tab and click the corresponding menu icon . If you selected any programs, a message displays the program folder where you can find your programs, which have not yet been activated.

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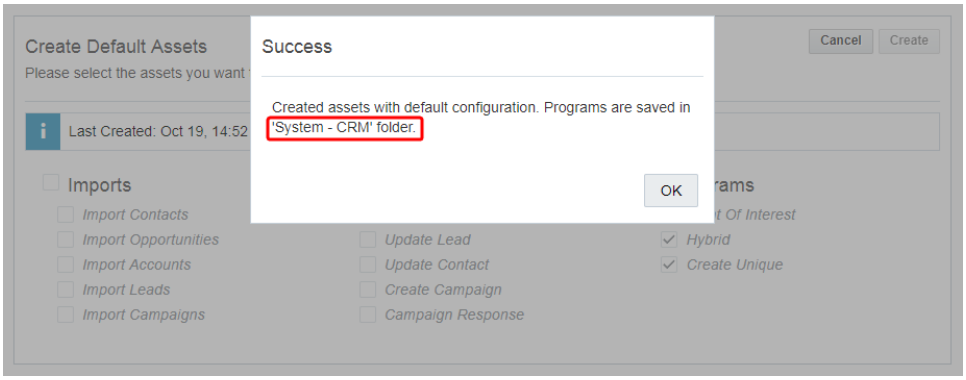

5. Once the default actions, imports, and programs are created for the connection, you can use them in a program or campaign.

Note: You will create duplicate actions, imports, and programs if you select **Create Default Assets** for the same connection, select the same assets, and click **Create**. The duplicate assets will have the same names incremented with integers in the following pattern: *connection_name - asset_name integer*, such as `Production - Hybrid 2`.

Migrating from the native integration

Important: *Oracle Sales* was formerly known as *Oracle Sales Cloud*. All instances of Oracle Sales Cloud have been changed to Oracle Sales across the app user interface.

You can run the migration wizard to automatically migrate the following assets from your native Oracle CX Sales integration:

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- Accounts
- Contacts
- Leads

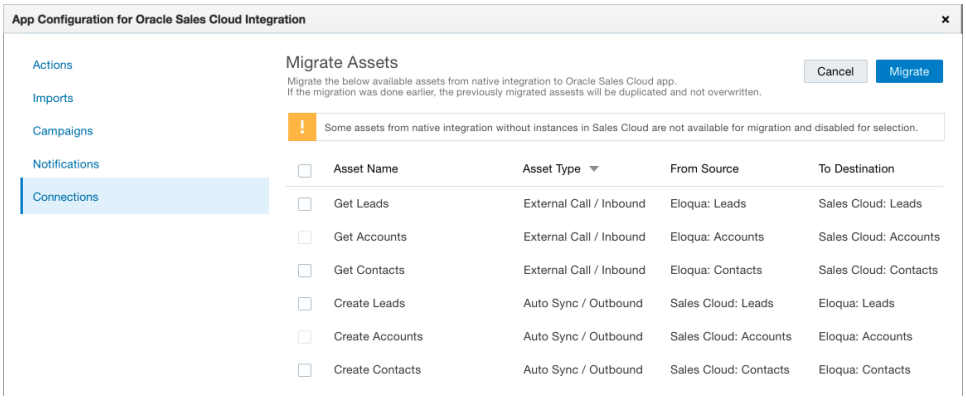
For cases where external calls in the native integration include Eloqua custom contact and account fields in their mappings or that use CDOs, you can modify the mappings after completing the migration from your native integration.

Prerequisites

- An existing native Oracle CX Sales integration with Oracle Eloqua
- A configured connection

To migrate native integration assets:

1. In the Oracle CX Sales Integration app, click **Connections**.
2. Click the connection's menu icon and select **Migrate Native Assets**. After fetching native assets for the connection, the app displays the *Migrate Assets* page.



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3. Select any of the assets that you want to migrate.

> **Note**: If an asset in your native integration does not have a corresponding asset in your Oracle CX Sales account, it cannot be selected on the *Migrate Assets* page.

4. Click **Migrate**. The selected assets are migrated with default names. Once the migration is complete, the *Migrate Assets* page displays the migration status for each asset:
   - Indicates that the migration of the asset was successful.
   - Indicates that some records could not be migrated because of a mismatch with the native integration. For example, this warning may indicate that internal or external calls in the native integration were migrated but some field mappings were not migrated. You can manually correct these by editing the corresponding imports and actions in the Oracle CX Sales Integration app.
   - Indicates that the migration of one or more assets failed because the connection to the server could not be made at this time.

   You can rerun the migration again at a later time if needed to correct issues due to a failed connection or mismatched records. To correct errors, such as mismatched values, you can manually fix the corresponding imports and actions. If you rerun the migration for successfully migrated assets, they will be duplicated and not overwritten.

5. Once you review the status of each migrated asset, click **Done**. The *Connections* page is displayed.

> **Note**: You will create duplicate assets if you select **Migrate Assets** for the same connection, select the same assets, and click **Migrate**. The duplicate assets will have the same names incremented with integers.

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Creating step actions

Important: *Oracle Sales* was formerly known as *Oracle Sales Cloud*. All instances of Oracle Sales Cloud have been changed to Oracle Sales across the app user interface.

Note: This page outlines how to create step actions in the Oracle CX Sales Integration app. You can also create campaign actions, create response actions, or automatically create actions.

Actions are data transactions between Oracle Eloqua and Oracle CX Sales (formerly Oracle Sales Cloud). The *Step Actions* page is where you create the types of actions to be used in a program or campaign when using the app. You can create the following types of actions:

- *Create*: Create new records in Oracle Sales.
- *Update*: Take existing Oracle Eloqua contacts and update their information in Oracle Sales.

Prerequisites

- A configured connection

To create a step action:

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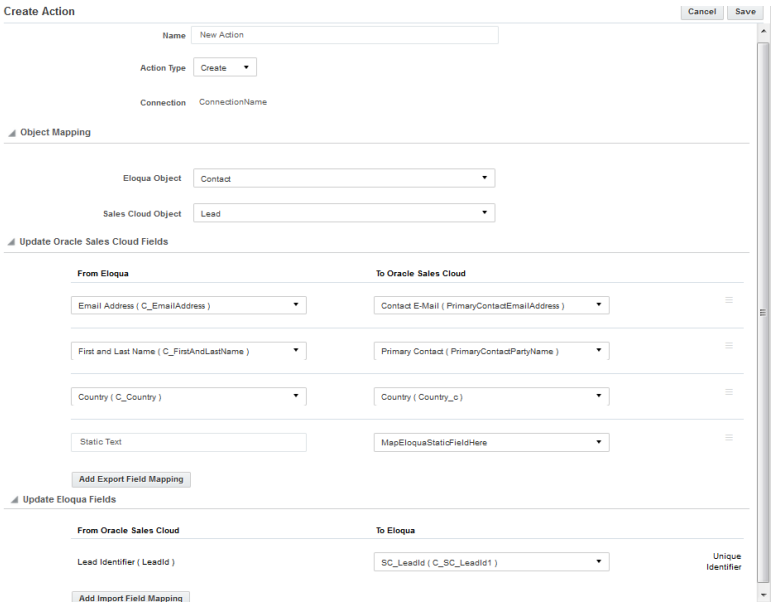
1. In the Oracle CX Sales Integration app, click **Actions**.
2. Click **Add Action** and select a connection for which you want to create a new action.
3. Complete the action details:



- **Name**: Enter a name for the action.
- **Action Type**: Click the drop-down list to select an action type to either create or update contact records.
- **Connection**: The connection cannot be modified.
- **Object Mapping**: To see available fields for mapping, select an Eloqua Object and CX Sales Object and click **Fetch**. The unique identifiers for field mappings will be determined once the *Fetch* button is clicked. Top-level objects from your Oracle Sales instance are available in the **CX Sales Object** list.

> **Note**: The **Fetch** button is only available for Oracle CX Sales (formerly Oracle Sales Cloud) version R12 or higher. Older versions of Oracle CX Sales automatically load fields to be mapped.

- **Update Oracle CX Sales Fields**: For each set of fields, specify the Oracle Sales field that will be mapped to Oracle Eloqua contacts. If you are updating contact records, the unique identifier is the first

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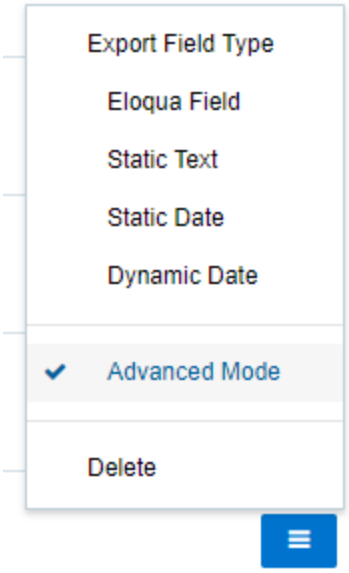
mapping shown in this list. Add more mappings by clicking **Add Export Field Mapping**. Click the menu to delete the mapping, or switch the field type to static text, static date, or dynamic date.

You can also **allow blank fields to be sent** from Oracle Eloqua to Oracle Sales when using the *Update* action type. This option is only available for fields that are not required.

> **Warning**: Do not check the **Allow null fields to be sent** option when mapping to a Oracle Sales date field type. An error will occur.

- **Update Eloqua Fields**: For each set of fields, specify the Eloqua field that will be mapped to Oracle Sales contacts. If you are creating contact records, the unique identifier is the first mapping shown in this list. Add more mappings by clicking **Add Import Field Mapping**. Click the menu to delete the mapping or switch a *From Oracle CX Sales* field type to static text, static date, or dynamic date.



  - If you select **Advanced Mode** from the , you can enter multiple values to be sent to a single Oracle Sales field: **Eloqua Object**, **Date**, or **Dynamic Date**. You can also type static text into the box as needed. For contacts, you can use advanced mode to select contact and related account fields. For CDOs,

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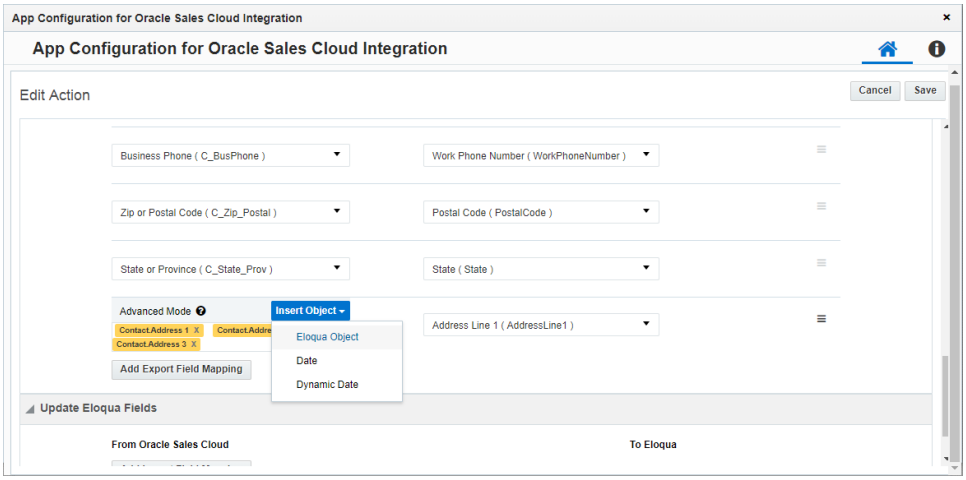
advanced mode allows you to select a CDO and its related contact and account fields.

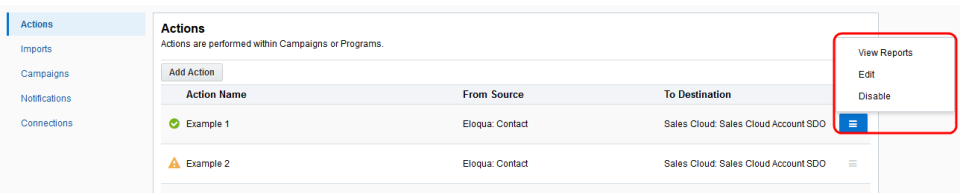


- **Import Rules**: Specify data priority.
  - **Data Priority**: Select the priority of data to resolve conflicts on imports, such as Bulk API and CRM Integration. If leads and contacts are being imported to Eloqua contacts, there may be situations where a lead and contact with the same email address exist. Eloqua's data priority can be used to instruct Eloqua which source, lead or contact, is higher priority. If the contact import is set to have a higher priority than the lead import, the data imported from the contact will not be overwritten by the lower priority lead data. Higher priority sources are never overwritten by lower priority sources. Data priority needs to be specified as part of an action to ensure that higher priority sources are not overwritten by lower priority sources from other imports.

4. Click **Save**.

Your action is created and can be used in a program or campaign.

Click the menu icon to modify the action. You can edit, enable, disable, or view report data for the action. If an action is disabled, you can delete it. If you attempt to delete an action that is used on a canvas, a warning message will display, but it can be overwritten if desired.



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Important: If an action is being used within a program or campaign and the action is disabled, contacts will not be processed until the action is enabled. Once the action has been re-enabled, the app will process all contacts.

Creating campaign actions

Important: *Oracle Sales* was formerly known as *Oracle Sales Cloud*. All instances of Oracle Sales Cloud have been changed to Oracle Sales across the app user interface.

Note: This page outlines how to create campaign actions. Learn how to create step actions and response actions.

Actions are data transactions between Oracle Eloqua and Oracle Sales. The *Campaign Actions* page is where you create actions to send data to Oracle Sales when campaigns change status. A status change is triggered by a campaign being created, deactivated, activated, scheduled, or completed. These actions are used for sending newly created campaigns, a campaign's activation status, deactivation status, completion status, and updates to existing campaigns (provided the Oracle Eloqua campaign has a Oracle Sales campaign ID).

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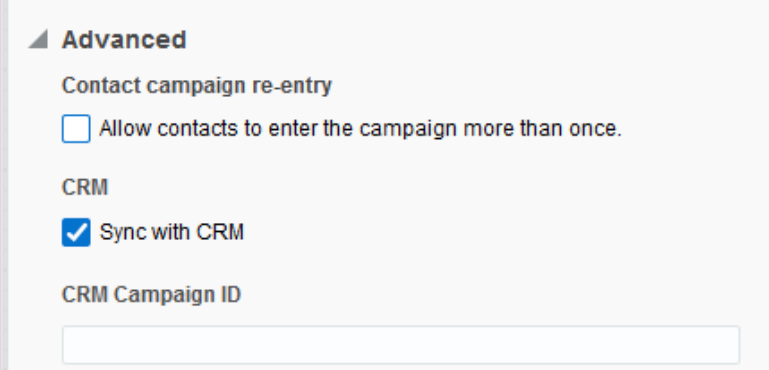
Tip: To sync your campaign with Oracle Sales, check the **Sync with CRM** box in your campaign's advanced settings (open a campaign > Options > Campaign Settings > Advanced). The CRM Campaign ID field populates after Oracle Eloqua syncs with Oracle Sales for the first time. This field (CRM Id) is used as a unique identifier for campaign actions. Map at least one more field in addition to the CRM Id.



Campaigns in Oracle Sales may also be imported into Oracle Eloqua to allow for bi-directional updates between the two applications. When a campaign action is enabled, any campaign imports using different connections are automatically disabled.

Prerequisites

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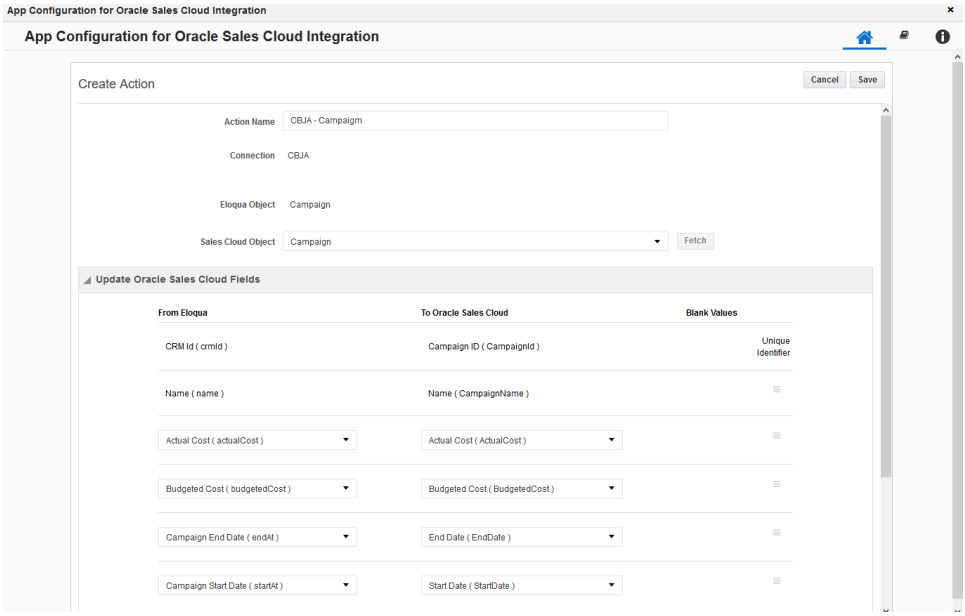
- Configure the following campaign statuses in Oracle CX Sales:

Eloqua campaign status	Campaign status codes sent to CX Sales
Campaign created or de-activated	ORA_DRAFT
Campaign activated	ORA_ACTIVE
Campaign scheduled	ORA_SCHEDULED
Campaign completed	ORA_COMPLETED

- A configured connection

To create a campaign action:

1. In the Oracle CX Sales Integration app, click **Campaigns**.
2. On the *Campaign Actions* tab, click **Add Action** and select a connection for which you want to create a new action.
3. Complete the action details:



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- **Name**: Enter a name for the action.
- **Object Mapping**: The Oracle Eloqua Object is set to *Campaign* and cannot be modified. To see available fields for mapping, select a top-level object from the **CX Sales Object** list and click **Fetch**. The unique identifiers for field mappings will be determined once the *Fetch* button is clicked.

> **Tip**: If enabled for your account, you can select Oracle CX Sales Campaign and Campaign Member objects. 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.

- **Update Oracle CX Sales Fields**: The unique identifiers are automatically determined by the selected Eloqua and CX Sales objects in the *Object Mapping* section. The Oracle Eloqua unique identifier is *CRM Id*. You must add at least one additional mapping by clicking **Add Export Field Mapping**. For each set of the fields, specify the Oracle Sales field that will be mapped to Oracle Eloqua contacts. Click the menu to delete the mapping, or switch the field type to static text, static date, or dynamic date. You can also **allow blank values to be sent** from Oracle Eloqua to Oracle Sales when using the *Update* action type. This option is only available for fields that are not required.

> **Warning**: Do not check the **Allow blank values to be sent** option when mapping to an Oracle Sales date field type. An error will occur.

- **Update Eloqua Fields**: The unique identifiers are automatically determined by the Eloqua and CX Sales objects specified in the *Object Mapping* section. The Oracle Eloqua unique identifier is *CRM Id*. You must add at least one additional mapping by clicking **Add Import Field Mapping**. For each set of fields, specify the Oracle Eloqua field that will be mapped to Oracle Sales contacts. Click the menu to delete the mapping or switch a *From Oracle CX Sales* field type to static text, static date, or dynamic date.

4. Click **Save**.

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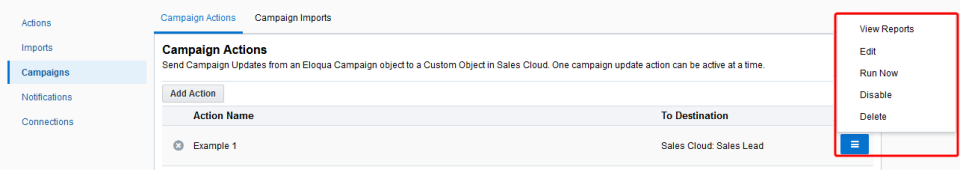
Click the list to modify the action. You can edit, enable, disable, or view report data for the action. Only one campaign action can be enabled at a given time. Enabling a new action will disable an existing one. You can delete disabled actions. The action can be run on demand using the **Run Now** option, and selecting a specific campaign.



Creating response actions

> **Important**: *Oracle Sales* was formerly known as *Oracle Sales Cloud*. All instances of Oracle Sales Cloud have been changed to Oracle Sales across the app user interface.

This page outlines how to create response actions. Learn how to create step actions and campaign actions.

Actions are data transactions between Oracle Eloqua and Oracle CX Sales. The Response Actions page is where you create actions to send data to Oracle CX Sales based on response rules configured in your Oracle Eloqua instance. When a response occurs, Oracle Eloqua records the response based on priority and the response is sent to an Oracle CX Sales object.

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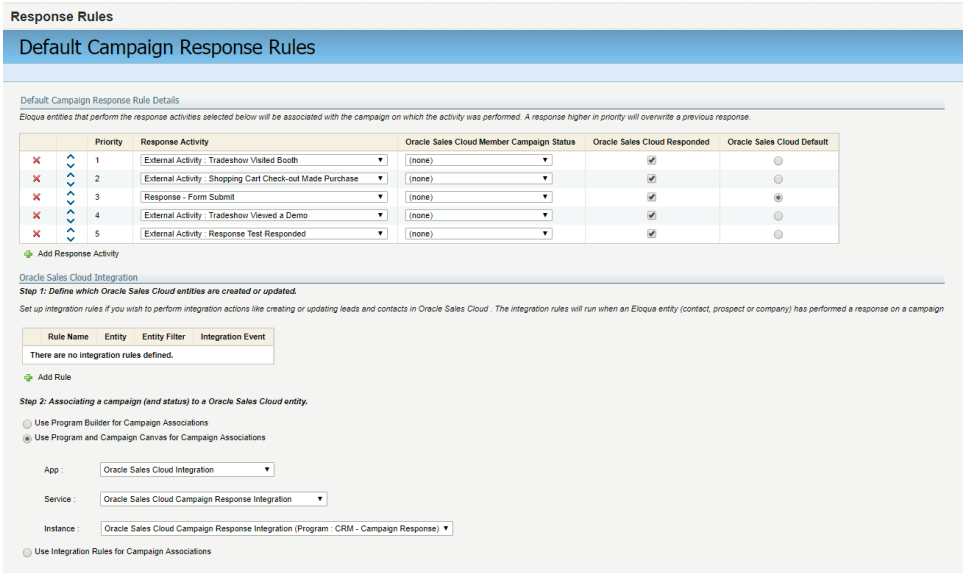
Important: Avoid uploading contact activities that are older than 30 days. These contact activities will not be sent to the Oracle CX Sales integration app.

The below image shows an example of Oracle Eloqua response rules configured to use program and campaign canvas for campaign associations.



Prerequisites

- A configured connection
- A response ruleconfigured in your Oracle Eloqua instance

To create a response action:

1. In the Oracle CX Sales Integration app, click **Campaigns**.
2. Click the **Response Actions** tab.

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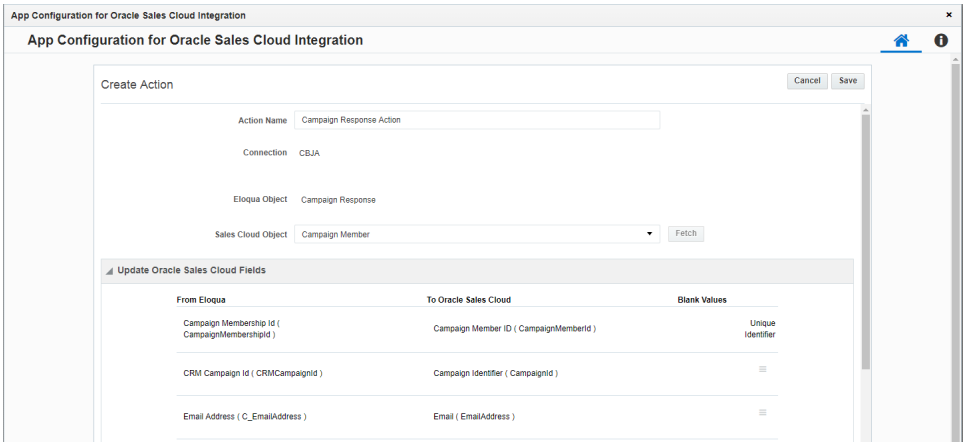
3. Click **Add Action** and select a connection for which you want to create a new action.

4. Complete the action details:
    - **Action Name**: Enter a name for the action.
    - **Connection**: The connection cannot be modified.
    - **Object Mapping**: The **Eloqua Object** is set to *Campaign Response* and cannot be modified. Select a top-level object from the **CX Sales Object** list and then click **Fetch**. The default field mapping is displayed.
    - **Update Oracle CX Sales Fields**: The Oracle Eloqua unique identifier is *Campaign Membership Id*. The Oracle CX Sales unique identifier is determined by the CX Sales object selected in *Object Mapping*. Add more mappings by clicking **Add Export Field Mapping**. For each set of fields, specify the Oracle CX Sales field that will be mapped to Oracle Eloqua contacts. Click the menu to delete the mapping, or switch the field type to static text, static date, or dynamic date. You can also **allow blank values to be sent** from Oracle Eloqua to Oracle CX Sales when using the *Update* action type. This option is only available for fields that are not required.



> **Warning**: Do not select the **Allow blank values to be sent** option when mapping to an Oracle CX Sales date field type. An error will occur.

5. Click **Save**.

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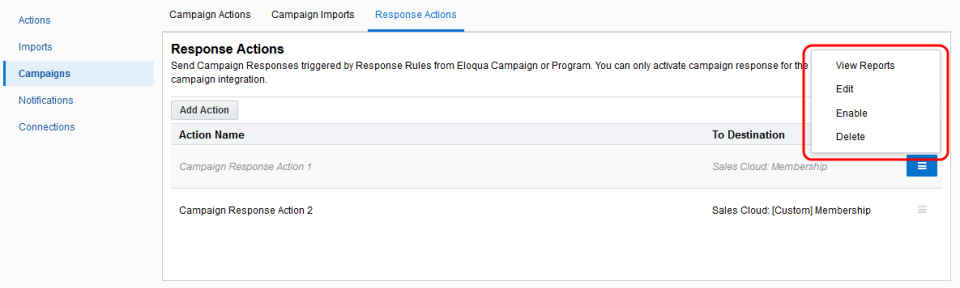
Click the list to modify the action. You can edit, enable or disable, and view report data for the action. Only one campaign action can be enabled at a time. Enabling a new action will disable an existing one. You must disable an action before you can delete it.



Creating imports

Important: *Oracle Sales* was formerly known as *Oracle Sales Cloud*. All instances of Oracle Sales Cloud have been changed to Oracle Sales across the app user interface.

Note: This page outlines how to manually create imports in the Oracle CX Sales Integration app. You can also create imports automatically.

Imports are data transactions from Oracle CX Sales into Oracle Eloqua. The Oracle CX Sales Integration app executes imports every 15 minutes. After an import has been scheduled, an import schedule does not display because imports are executed so often. If an import needs to be performed off schedule, it can be executed on demand. An import may fail due to various reasons such as connection or data related issues. Some of these

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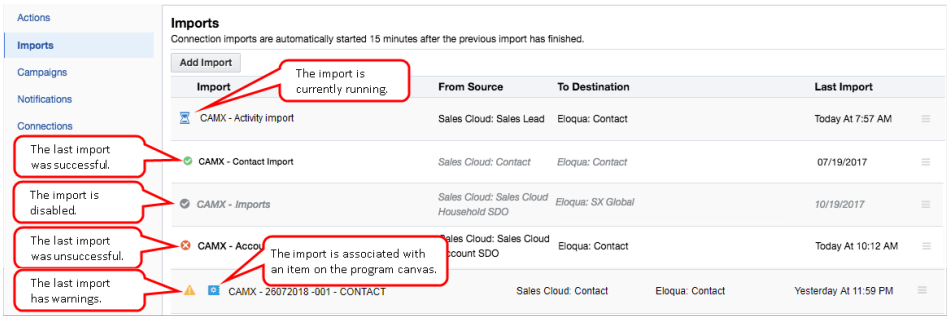
issues will cause an entire import to fail. You can setup email notifications to alert you when import errors occur.

The following imports are recommended:

- Accounts
- Contacts
- Leads
- Opportunities

When viewing your imports, disabled imports are dimmed to indicate their status. There are several indicators in your list of imports to help you quickly get an overview of their status:



Prerequisites

- A configured connection
- Create any shared contact lists if needed for post processing the import.

> **Note**: Campaign, opportunity, and user imports have additional prerequisites.

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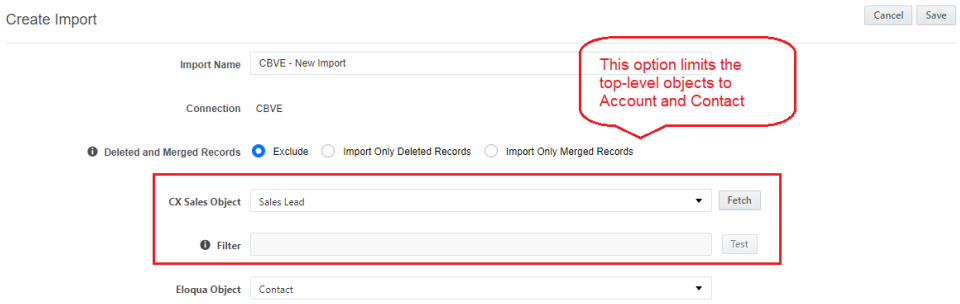
To create an import:

1. In the Oracle CX Sales Integration app, click **Imports**.
2. Click **Add Import** and select the connection for which you want to create a new import.
3. Complete the import details:
    - **Name**: Enter a name for the import.
    - **Deleted or Merged Records**: Select this option if you want to recognize deleted or merged (that is, non-survivor) Oracle Sales records in Oracle Eloqua. If you select this option, the **CX Sales Object** and **Eloqua Object** lists only display the **Account** and **Contact** options.



    - **CX Sales Object**: Select the top-level objects from your Oracle CX Sales instance that you want to import and click **Fetch**. Oracle CX Sales is queried and additional options are displayed and unique identifiers for field mappings are available on the *Create Import* page.
    - **Filter**: (Optional) Enter a filter to use on the source field when querying contacts to import and then click **Test** to test the filter.
      See example filters

      To learn more about filters, see the Oracle CX Sales (formerly Oracle Sales Cloud) REST API guide.

Filter Syntax	Description
FirstName=<value> **Example**: FirstName='Thomas'	Filters on a record's first name.
LastName=<value> **Example**: LastName='Lambert'	Filters on a record's last name.

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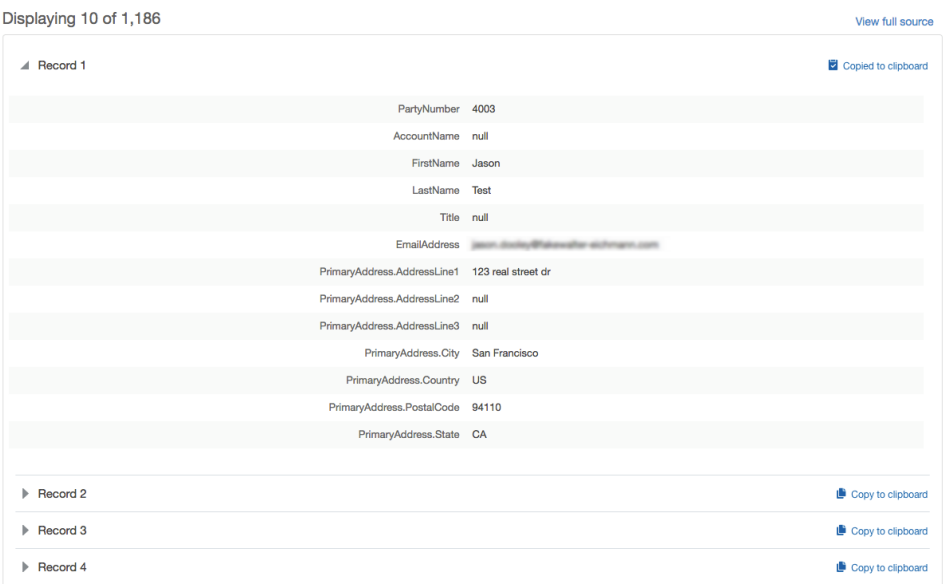
Filter Syntax	Description
Title=<value> **Example**: Title='Marketer'	Filters on a record's title.
PartyStatus!=<value> **Example**: PartyStatus!='A'	Filters on a record's party status that is not active. A value of "A" means the status is active.
LastName LIKE <value>% **Example**: LastName LIKE 'Thomas%'	Filters on a record's last name to compare it with a value using a wildcard operator.
PrimaryContactEmailAddress LIKE %@% **Example**: PrimaryContactEmailAddress LIKE '%@%'	Filters on a record's email address to compare it with a value using a wildcard operator.
LastName LIKE <value>% AND FirstName=<value> **Example**: LastName LIKE 'Lambert%' AND FirstName='Thomas'	Filters on a record's first name and last name.

This is an example of test filter results:



- **Eloqua Object**: Select an Oracle Eloqua object and Oracle CX Sales object .
- **Update Eloqua Fields**: Map your unique identifier to specify the object in Oracle Eloqua to update or create. For each set of fields, select the Oracle Eloqua field that will be mapped to Oracle CX Sales

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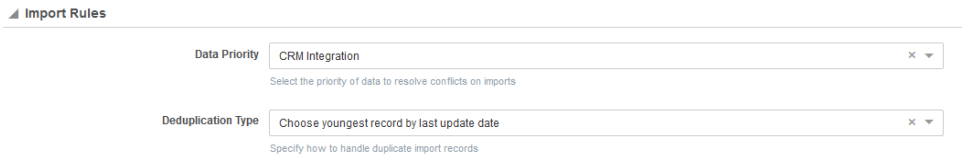
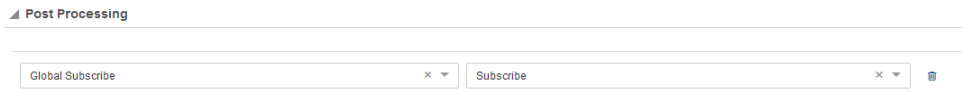
contacts. Add more mappings by clicking **Add Import Field Mapping**. Click the menu to delete the mapping or switch the field type to static text, static date, or dynamic date.

- **Import Rules**: Specify data priority and deduplication rules.



  - **Data Priority**: Select the priority of data to resolve conflicts on imports, such as Bulk API and CRM Integration. If leads and contacts are being imported to Oracle Eloqua contacts, there may be situations where a lead and contact with the same email address exist. Oracle Eloqua's data priority can be used to instruct Oracle Eloqua which source, lead or contact, is higher priority. If the contact import is set to have a higher priority than the lead import, the data imported from the contact will not be overwritten by the lower priority lead data. Higher priority sources are never overwritten by lower priority sources.
  - **Deduplication type**: Specify how to handle duplicate import records. For example, you can chose the most recently updated record or import all records. Deduplication runs per import execution. If multiple records with the same match field value are imported in a single execution, those records will be deduplicated based on the setting specified here.

- **Post Processing**: Specify an action to be performed on a contact after import. You can specify a maximum of ten post processing items, including the following actions and any OSC Feeder elements that you add to a canvas.



  - **Add to Shared List / Remove from Shared List**: Specify whether contacts should be added to or removed from an existing shared contact list. As contacts are processed, Oracle Eloqua adds them to the shared list that you specify.
  - **Subscribe to Email Group / Unsubscribe from Email Group**: Specify whether contacts should be subscribed to or unsubscribed from an email group.
  - **Global Subscribe**: Specify whether to apply the global **Subscribe** or **Unsubscribe** actions to the contacts.
  - **SMS Opt-in Phone Number / SMS Opt-out Phone Number**: Specify whether after the import, phone number(s) should be opted in or opted out from receiving SMS messages.
  - **Add Action**: Click to add another action to be performed after the import.

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4. **Program Usage**: Once you save the import and associate it with a program on the campaign or program canvas to perform any specified post processing actions, this section will display the associated program dependencies and provide a link to display the canvas.
5. Click **Save**.

Viewing and editing imports

To view or edit an import:

1. In Eloqua, click the *cloud menu* icon on the right hand side to expand the *Apps* list and select **Oracle CX Sales Integration**. The *App Configuration for Oracle CX Sales Integration* page is displayed.
2. Click **Imports**. The list of imports provides several indicators and each import has a menu with several options.
    - Colored icons indicate that the import is enabled.
    - Disabled imports are dimmed to indicate their status.
    - : Indicates that the import is currently running. When enabled, imports run automatically every 15 minutes.
    - : Indicates that the last import was successful.
    - : Indicates that the last import was unsuccessful.
    - : Indicates that the last import failed with warnings.
    - : Indicates that the import is associated with a program that is running on a canvas, such as the OSC Feeder action. If you attempt to disable or delete an import with an associated program that is running, you will receive a warning message.

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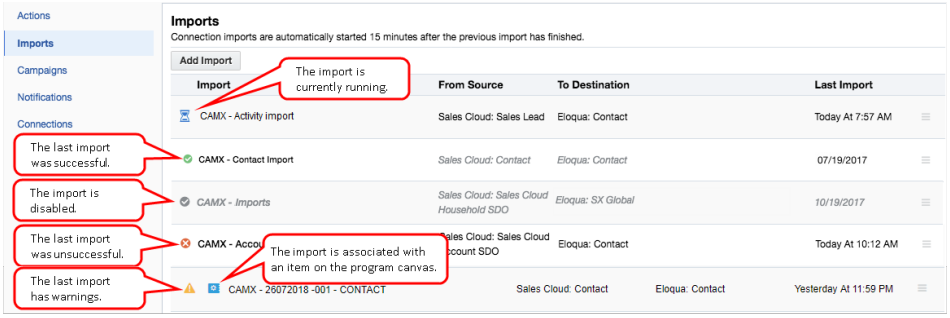
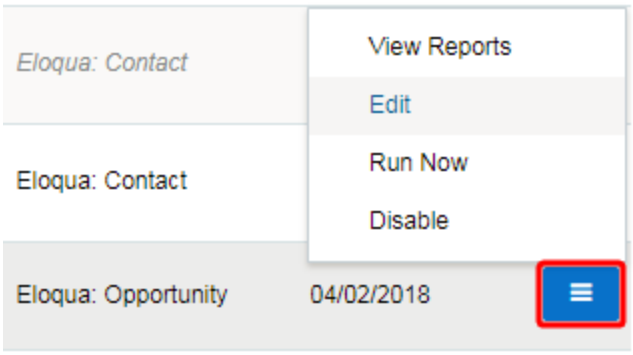


3. Click the import's menu ☰ to select options:
    - View Reports: Display activity for the import by date.
    - **Edit**: Modify some of the import's values or view its details, including the *Program Usage* section.
    - **Enable** or **Disable**: If you enable the import, the **Run Now** option is displayed, which allows you to run the import on demand.
    - **Delete**: Once an import is disabled, the **Delete** option is displayed.



4. Click **Edit** to view the import's details, such as mapping, import rules, and so on. You can edit any attributes except for:
    - Connection
    - CX Sales Object
    - Eloqua Object
    - Program Usage items
5. To view the program associated with the import, expand the import's *Program Usage* section and click the go to icon ⧉ to display the associated campaign or program canvas.

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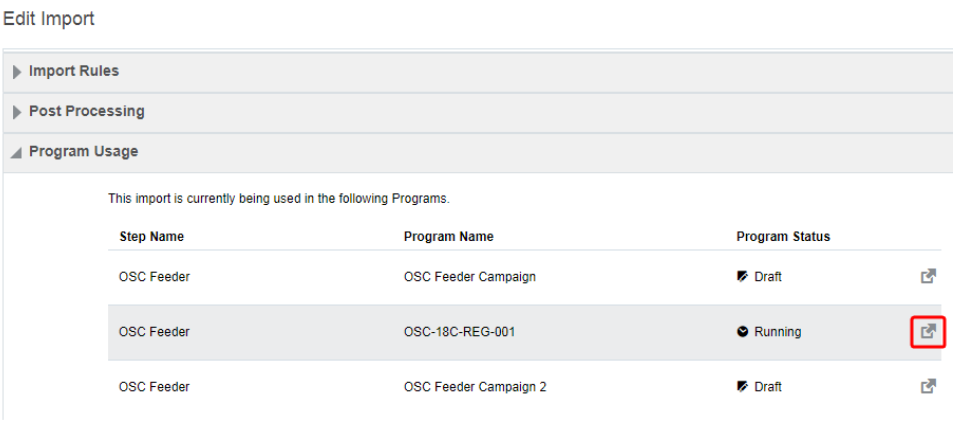

Scheduling an import

Once you create an import, it is scheduled to run automatically every 15 minutes.

You can also run the import on demand using the **Run Now** option. When **Run Now** is used with a date and time filter, the current date and time is pre-populated. The date and time can be changed to a time in the past as desired. If no date is selected, the import retrieves all matching records from Oracle CX Sales and imports them to Oracle Eloqua. Selecting a specific date allows you to recover missed records and perform partial imports if field mapping changes.

> **Note**: The *Last Import* date indicates the last successful import.

Clicking **Disable** temporarily stops the imports. If the import is currently running and has not yet started syncing to Oracle Eloqua (if it is in either the *Retrieve from CX Sales* or *Deduplicating* steps), the import is canceled and disabled. If the import has begun importing to Oracle Eloqua, the import will finish, then be disabled. Click **Enable** to schedule your import to run every 15 minutes.

You can also add imports to a canvas and schedule them via the Wait element.

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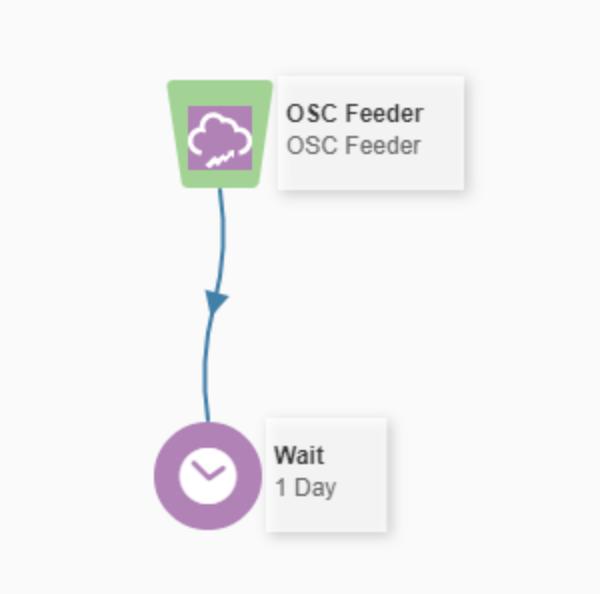
Adding imports to a canvas

Important: *Oracle Sales* was formerly known as *Oracle Sales Cloud*. All instances of Oracle Sales Cloud have been changed to Oracle Sales across the app user interface.

Using Oracle Eloqua's OSC Feeder service, you can specify an Oracle CX Sales Integration app import and schedule the import's post processing actions. When the feeder runs, the post processing actions update the associated import.

You can use this service on the program canvas. The following example shows a program canvas where the *Wait* element is configured to run the OSC Feeder step at specific intervals. You can also use the OSC Feeder element with other audience steps on the program canvas to update or create contact records within a program.



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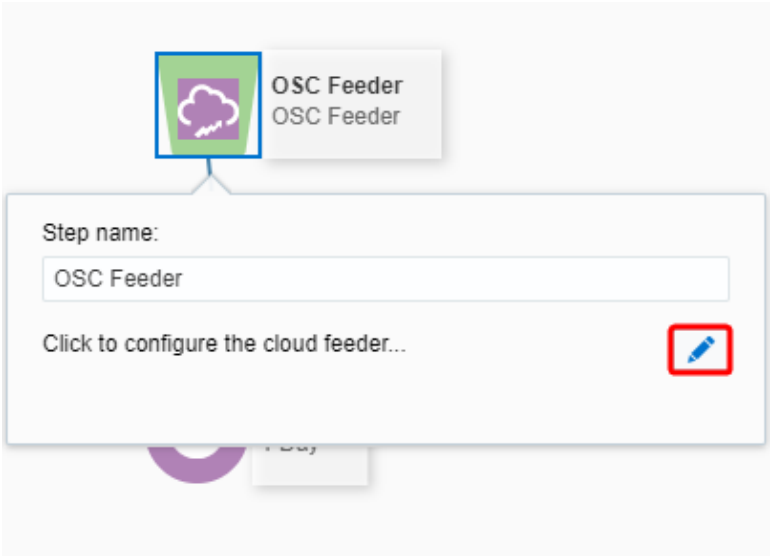
Note: Adding the OSC Feeder element to a canvas counts towards the limit of ten post processing actions.

To add the OSC Feeder to a program:

1. Open an existing program or create a new one.
2. From the *Data Sources* section, drag the OSC Feeder element onto the canvas.
3. Configure the Wait element to run at specific intervals and connect it to the OSC Feeder step.
4. Click **Save**. The canvas must be saved before you can configure the OSC Feeder step.
5. Double-click the element to open its configure screen. The window that opens enables you to do the following:
    - Change the name of the step to something more meaningful.
    - Click the edit icon to configure the element.



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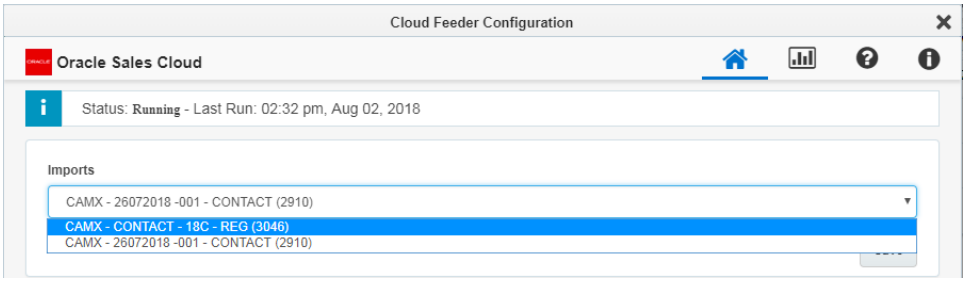
6. Click the edit icon to configure the action. The configuration dialog provides the option to select an import.



> **Tip**: If you are using Firefox and the configuration screen does not load properly, clear the browser cache.

7. From the **Imports** list, select the import you want to associate with the OSC Feeder. This creates a link between the canvas and the import.
8. Click **Save** to save the configuration and then click **Save** to save any changes you made to the program.

When imports flow through the OSC Feeder element, its post processing actions are run at the intervals scheduled by the Wait element.

To view a report about the information the OSC Feeder has processed, its status, errors, and other details, view its Daily Feeder Run report.

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Creating campaign imports

Important: *Oracle Sales* was formerly known as *Oracle Sales Cloud*. All instances of Oracle Sales Cloud have been changed to Oracle Sales across the app user interface.

You can create and schedule campaign imports in the Oracle CX Sales Integration app. The Oracle CX Sales Integration app executes imports every 15 minutes. After an import has been scheduled, an import schedule does not display because imports are executed so often. If an import needs to be performed off schedule, it can be executed on demand. An import may fail due to various reasons such as connection or data related issues. Some of these issues will cause an entire import to fail. You can setup email notifications to alert you when import errors occur.

When a campaign action is enabled, any campaign imports using different connections are automatically disabled.

Prerequisites

- A configured connection

To create a campaign import:

1. In the Oracle CX Sales, click **Campaigns**.
2. Click the **Campaign Imports** tab.
3. Click **Add Import** and select a connection for which you want to create a new import.

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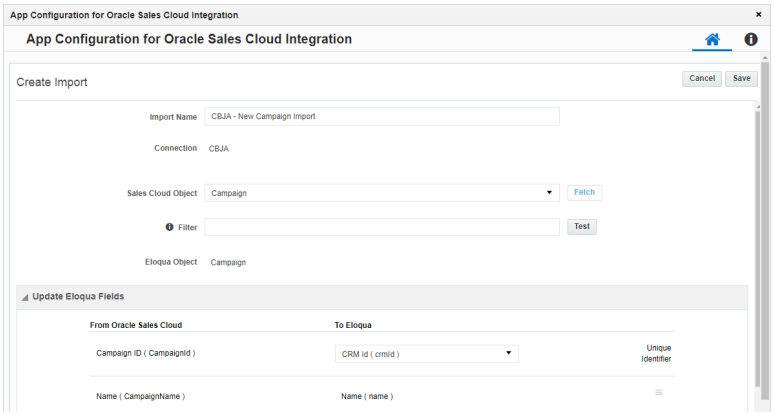
4. Complete the import details:



- **Name**: Enter a name for the import.
- **Object Mapping**: The **Eloqua Object** is set to *Campaign* and cannot be modified. To see available fields for mapping, select a top-level object from the **CX Sales Object** list and click **Fetch**.The unique identifiers for field mappings will be determined once the *Fetch* button is clicked.

> **Note**: The **Fetch** button is only available for Oracle CX Sales (formerly Oracle Sales Cloud) version R12 or higher. Older versions of Oracle CX Sales automatically load fields to be mapped.

- **Filter**: Enter a filter to use on the CRM source field when querying contacts to import. Click **Test** to test the filter.
  See example filters

  To learn more about filters, see to the Oracle CX Sales REST API Guide.

Filter Syntax	Description
FirstName=<value> **Example**: FirstName='Thomas'	Filters on a record's first name.
LastName=<value> **Example**: LastName='Lambert'	Filters on a record's last name.
Title=<value>	Filters on a record's title.

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Filter Syntax	Description
Example: Title='Marketer'	
PartyStatus!=<value> **Example**: PartyStatus!='A'	Filters on a record's party status that is not active. A value of "A" means the status is active.
LastName LIKE <value>% **Example**: LastName LIKE 'Thomas%'	Filters on a record's last name to compare it with a value using a wildcard operator.
PrimaryContactEmailAddress LIKE %@% **Example**: PrimaryContactEmailAddress LIKE '%@%'	Filters on a record's email address to compare it with a value using a wildcard operator.
LastName LIKE <value>%;FirstName=<value> **Example**: LastName LIKE 'Lambert%';FirstName='Thomas'	Filters on a record's first name and last name.

- **Update Eloqua Fields**: The unique identifiers are automatically determined by the **Eloqua Object** and **CX Sales Object** values in the *Object Mapping* section. For each set of fields, select the Oracle Eloqua field that will be mapped to Oracle CX Sales contacts. Add more mappings by clicking **Add Import Field Mapping**. Click the menu to delete the mapping or switch the field type to static text, static date, or dynamic date.
- **Import Rules**: Specify deduplication rules.
    - **Deduplication type**: Specify how to handle duplicate import records. For example, you can chose the most recently updated record or import all records. Deduplication runs per import execution. If multiple records with the same match field value are imported in a single execution, those records will be deduplicated based on the setting specified here.
- **Post Processing**: Post processing rules are not available for campaign imports.

5. Click **Save**.

Click the import's menu to modify the import. You can edit, enable (to schedule your import) and disable, or view report data for an import. If an import is disabled, you can delete it.

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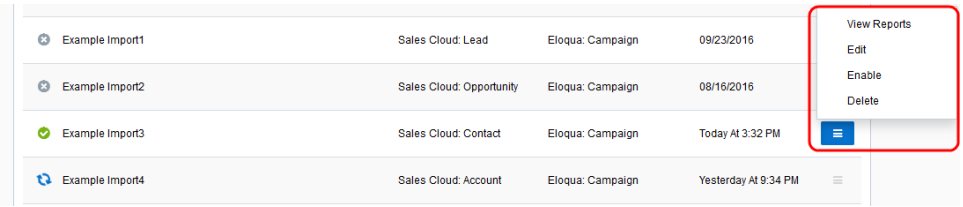

Once your import is scheduled, it automatically runs every 15 minutes. The import can be run on demand using the **Run Now** option. When **Run Now** is used with a date and time filter, the current date and time is pre-populated. The date and time can be changed to a time in the past as desired. If no date is selected, the import retrieves all matching records from Oracle CX Sales and imports them to Oracle Eloqua. Selecting a specific date allows you to recover missed records and perform partial imports if field mapping changes.

Note: The *Last Import* date indicates the last successful import.

Clicking **Disable** temporarily stops the imports. If the import is currently running and has not yet started syncing to Oracle Eloqua (if it is in either the *Retrieve from CX Sales* or *Deduplicating* steps), the import is canceled and disabled. If the import has begun importing to Oracle Eloqua, the import will finish, then be disabled. Click **Enable** to enable your import.

Disabled imports are dimmed to indicate their status. There are several indicators in your list of imports to help you quickly get an overview of their status:

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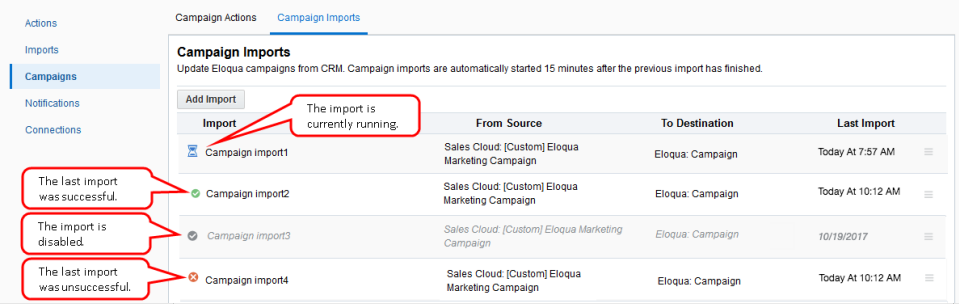

Creating opportunity imports

Important: *Oracle Sales* was formerly known as *Oracle Sales Cloud*. All instances of Oracle Sales Cloud have been changed to Oracle Sales across the app user interface.

Note: This page outlines how to manually create opportunity imports in the Oracle CX Sales Integration app. You can also create imports automatically.

An opportunity is a potential sales deal created and maintained by the sales team. You can import Oracle CX Sales opportunities into Oracle Eloqua to enable marketers to report on opportunities and measure campaign effectiveness. Data imported by the Oracle CX Sales Integration app is required to populate Insight's closed-loop reporting data for Oracle CX Sales opportunities.

Opportunity imports have dependencies: they are typically linked to contacts directly or to contacts via accounts. The *Imports* list will display the opportunity import as a child of its parent object.

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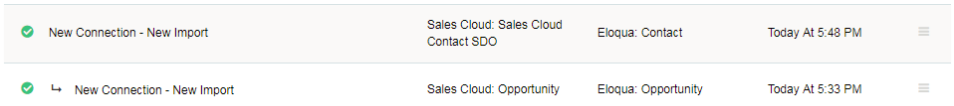

You must specify at least one parent dependency so that the linked Contact object is created in Oracle Eloqua *before* the opportunity is imported. You can specify up to two parent dependencies (typically a Contact and an Account import). To avoid opportunity import errors, parent imports should be successfully run before the opportunity import is run.

Prerequisites

- A configured connection
- Identify the correct names of the object and associated fields that you want to import from Oracle CX Sales and use for linking to an Oracle Eloqua object. The linking field is the Oracle CX Sales Contact ID or Account ID.
- A successful contact import for the connection, which must be enabled before the opportunity import can be run
- If you will select **Contacts via Account**, you will also need a successful account import for the connection and link the contact import to the account. The linked account and contact imports must both be enabled before the opportunity import can be run.

To create an opportunity import:

1. In the Oracle CX Sales Integration app, click **Imports**.
2. Click **Add Import** and select a connection for which you want to create a new import. The *Create Import* page displays a default name for the import.
3. Enter a unique name for the opportunity import.

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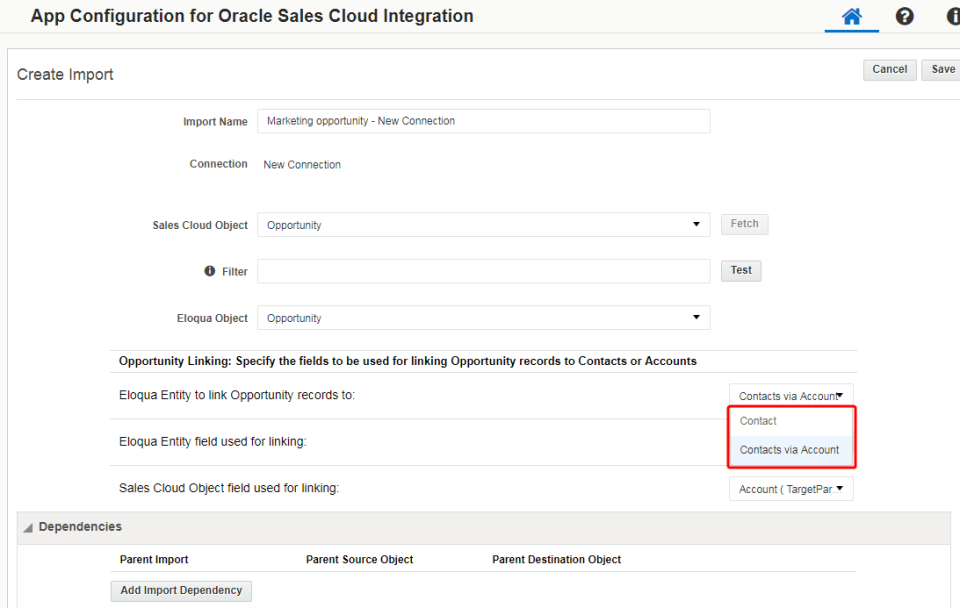
4. From the **CX Sales Object** list, select **Opportunity**.
5. From the **Eloqua Object** list select **Opportunity**. The *Opportunity Linking* section is displayed.
6. Click **Fetch** to populate available fields in the *Opportunity Linking* section's lists.
7. From the **Eloqua Entity to link Opportunity records to** list, select one of the following:
    - **Contact**: Indicates that the Oracle Eloqua opportunity import should be linked to the contact import (one parent dependency).
    - **Contact via Account**: Indicates that the Oracle Eloqua opportunity import should be linked to the contact import, which is linked with its account import (two parent dependencies). The contact import should first be linked to the account import before the opportunity import is enabled.



8. From the **CX Sales Object field used for linking** list, select one of the following Oracle CX Sales fields:
    - **Primary Contact (KeyContactId)**: If you are linking directly to contacts, select this field to link to the corresponding Oracle Eloqua contact field.
    - **Account (TargetPartyId)**: If you are linking to contacts via accounts, select this field to link to the corresponding Oracle Eloqua contact field.
9. From the **Eloqua Entity field used for linking** list, select one of the following Oracle Eloqua fields:

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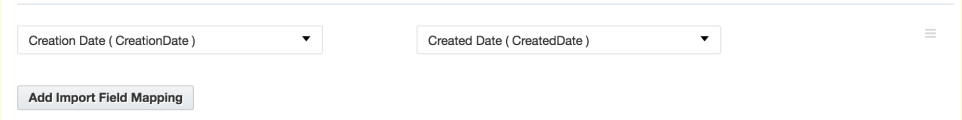
- **SC_Contact_PartyId**: If you are linking directly to contacts, select this field to link to the corresponding Oracle CX Sales contact field.
- **SC_Account_PartyId**: If you are linking to contacts via accounts, select this field to link to the corresponding Oracle CX Sales contact field.

Note: You can select different fields to use for linking if you have specific business needs.

10. In the *Dependencies* section, click **Add Import Dependency**.
11. In the *Parent Import* column, select the name of the parent object to establish the opportunity import's dependency on an existing import, such as the name of an existing contact import. If you have two parent dependencies, click **Add Import Dependency** again and add the second dependency. You can establish the dependency while the parent import is disabled. However, the parent import must be enabled before you can enable its opportunities import.
12. In the *Update Eloqua Fields* section, adjust the default field mappings if necessary. For each set of fields, select the Oracle Eloqua field that will be mapped to Oracle CX Sales contacts. You can add more mappings by clicking **Add Import Field Mapping**. Click the menu to delete a mapping or switch its field type if needed.

Important: To address a known issue, you must map Oracle CX Sales's **Creation Date (CreationDate)** field to Oracle Eloqua's **Created Date (CreatedDate)** field. If you do not add it, an error will be displayed when you attempt to enable the import. In a future release, this field will be mapped by default.



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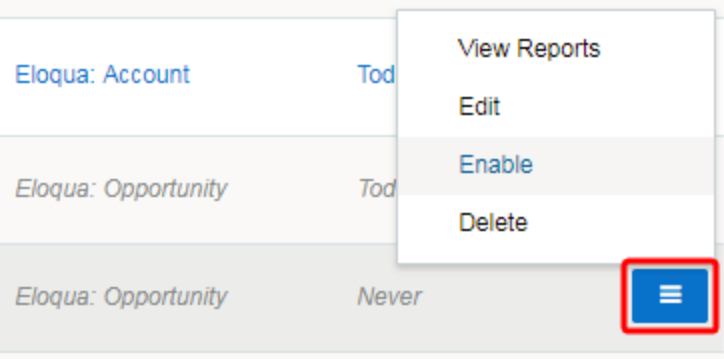
13. In the *Import Rules* section, adjust the default data priority or deduplication rules if needed.
14. Click **Save**. The *Imports* page displays the new opportunity import in the list.
15. If one or more of the opportunity import's parent objects are disabled, click the corresponding menu ☰ and select **Enable** to run the parent import.
16. Click the menu for the new opportunity import and select **Enable** to run it.



Once your import is scheduled, it automatically runs every 15 minutes and is based on the parent import timing and success. If there is a failure on any parent, the child import will not execute.

You can determine whether an opportunity import was successful or partially succeeded by selecting **View Report** from the menu. Some links for the object dependencies should be created for an initial successful opportunity import.

> **Note**: The opportunity import report may indicate 0 links after the initial successful import if no additional records were created.

Clicking **Disable** temporarily stops the imports. If the import is currently running and has not yet started syncing to Oracle Eloqua (if it is in either the *Retrieve from CX Sales* or

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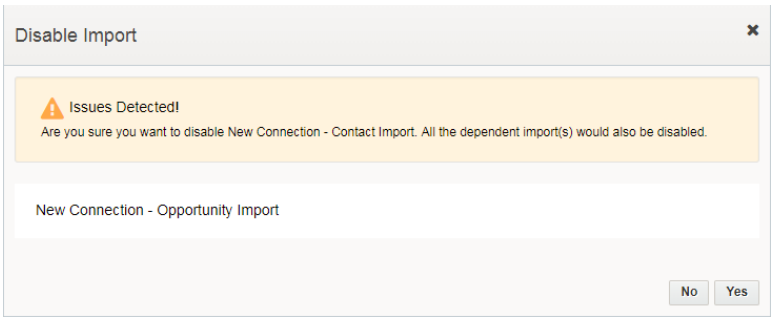
Deduplicating steps), the import is canceled and disabled. If the import has begun importing to Oracle Eloqua, the import will finish, then be disabled.

If you click **Disable** or **Delete** for an import that has dependencies, a message will indicate those dependencies.



Before clicking **Yes** to disable or delete the import, determine whether you also want to disable the linked imports (or delink the imports if you are deleting a parent import).

Creating user imports

Important: *Oracle Sales* was formerly known as *Oracle Sales Cloud*. All instances of Oracle Sales Cloud have been changed to Oracle Sales across the app user interface.

Note: This page outlines how to manually create and schedule user imports in the Oracle CX Sales Integration app. You can also create imports automatically.

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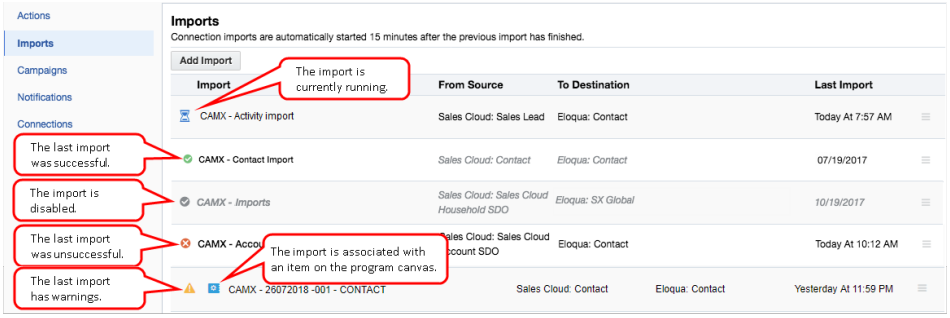
Oracle CX Sales users can be imported into Oracle Eloqua. By importing, users can be created and updated, they can be placed in a folder, and added to or removed from a security group.

The Oracle CX Sales Integration app executes imports every 15 minutes. After an import has been scheduled, an import schedule does not display because imports are executed so often. If an import needs to be performed off schedule, it can be executed on demand. An import may fail due to various reasons such as connection or data related issues. Some of these issues will cause an entire import to fail. You can setup email notifications to alert you when import errors occur.

Disabled imports are dimmed to indicate their status. There are several indicators in your list of imports to help you quickly get an overview of their status:



Prerequisites

- A configured connection
- For *User (BI report)* object, you will need to include the report path of a BI user report in Oracle CX Sales

To create a user import:

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1. In the Oracle CX Sales Integration app, click **Imports**.
2. Click **Add Import** and select a connection for which you want to create a new import.
3. Complete the import details:
    - **Name**: Enter a name for the import.
    - **Connection**: The connection cannot be modified.
    - **CX Sales Object**: Select **User** or **User (BI report)**.

      > **Note**: User (BI report) does not display for all accounts.

    - **Report Path**: If you selected *User (BI report)*, enter in the path to the user report in Oracle CX Sales.

      > **Note**: For the *User (BI report)*, a BI user report must first exist in Oracle CX Sales. An example of a report path is `/Custom/usyncrep.xdo`

    - **Eloqua Object**: Select *User*.
    - Click **Fetch** to see available fields for mapping.

      > **Note**: The **Fetch** button is only available for Oracle CX Sales (formerly Oracle Sales Cloud) version R12 or higher. Older versions of Oracle CX Sales automatically load fields to be mapped.

    - **Update Eloqua Fields**: Map your unique identifier to specify the object in Oracle Eloqua to update or create. For each set of fields, select the Oracle Eloqua field that will be mapped to Oracle CX Sales contacts. Add more mappings by clicking **Add Import Field Mapping**. Click the menu to delete the mapping or switch the field type to static text, static date, or dynamic date.

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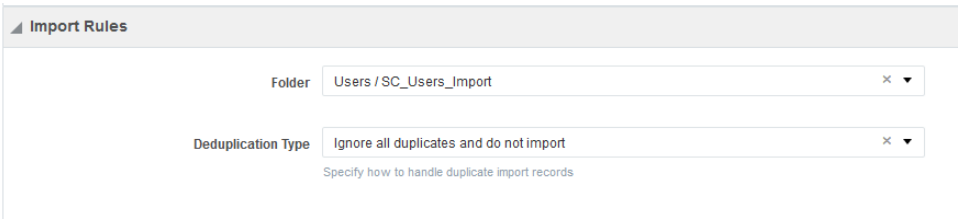
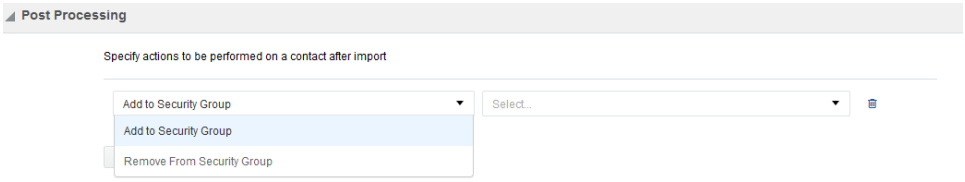
- **Import Rules**: Specify folder and deduplication rules.



  - **Folder**: Select an Oracle Eloqua folder where the user should be saved. All existing user folders in your instance are available in this drop-down menu. New folders cannot be created from this menu.
  - **Deduplication type**: Specify how to handle duplicate import records. For example, you can choose the most recently updated record or import all records. Deduplication runs per import execution. If multiple records with the same match field value are imported in a single execution, those records will be deduplicated based on the setting specified here.

- **Post Processing**: Click **Add Action** to specify an action to be performed on a user after import.



  - **Add to Security Group / Remove from Security Group**: Specify whether after the import, users should be added to or removed from a security group.

4. Click **Save**.

Click the drop-down list to modify the import. You can edit, enable (to schedule your import) and disable, or view report data for an import. If an import is disabled, you can delete it.

Once your import is scheduled, it automatically runs every 15 minutes. The import can be run on demand using the **Run Now** option. When **Run Now** is used with a date and time filter, the current date and time is pre-populated. The date and time can be changed to a time in the past as desired. If no date is selected, the import retrieves all matching records from Oracle CX Sales and imports them to Oracle Eloqua. Selecting a specific date

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allows you to recover missed records and perform partial imports if field mapping changes.

> **Note**: The *Last Import* date indicates the last successful import.

Clicking **Disable** temporarily stops the imports. If the import is currently running and has not yet started syncing to Oracle Eloqua (if it is in either the *Retrieve from CX Sales* or *Deduplicating* steps), the import is canceled and disabled. If the import has begun importing to Oracle Eloqua, the import will finish, then be disabled. Click **Enable** to enable your import.

Configuring notifications

> **Important**: *Oracle Sales* was formerly known as *Oracle Sales Cloud*. All instances of Oracle Sales Cloud have been changed to Oracle Sales across the app user interface.

An import or action may fail due to various reasons such as connection or data related issues. Use the *Notifications* page to setup email notifications to alert you of import and action errors. The notification includes your client and import name, start and end times, and identifies the step at which the error occurred.

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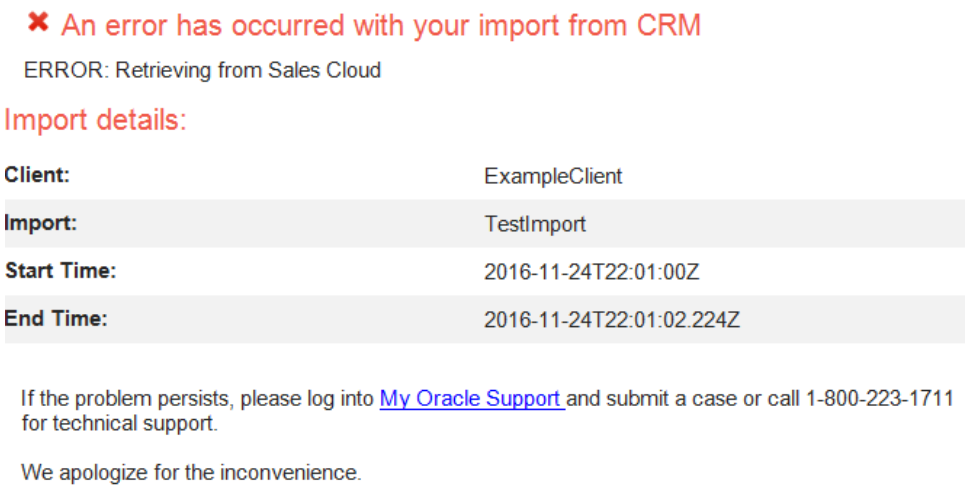
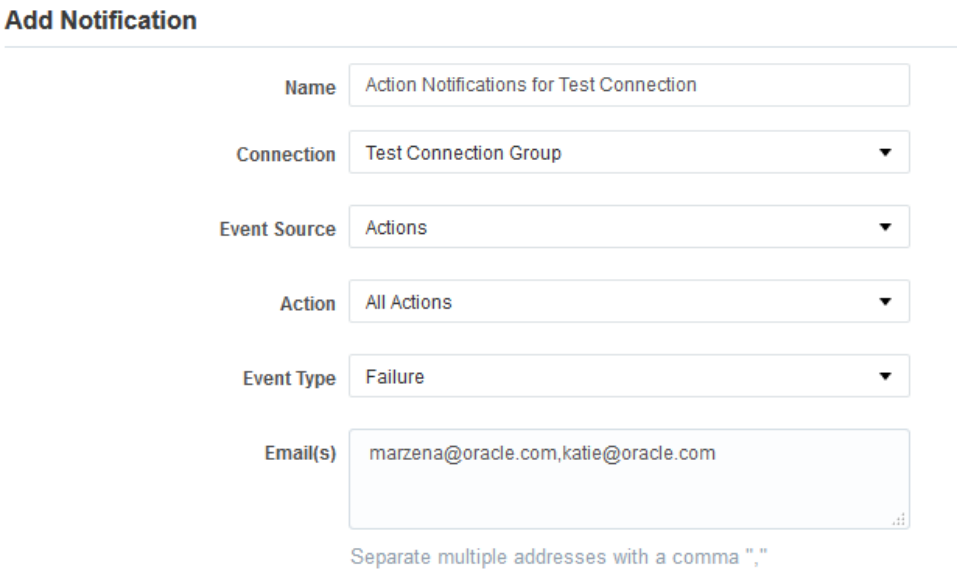


To configure a notification:

1. In the Oracle CX Sales Integration app, click **Notifications**.
2. Click **Add Notification**.
3. Select the notification settings and recipients:



- *Name*: Provide a descriptive name that will appear in the list of notifications.
- *Connection*: Select a specific connection or all connections.

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- *Event Source*: Notifications are currently available for imports and actions.
- *Import* or *Action*: Select the import or action, or all events, for which you want to receive notifications.
- *Event Type*: Notifications are available for failed imports and actions.
- *Email(s)*: Enter recipient email addresses. You can enter multiple email addresses separated by commas.

4. Click **Save**.

You can return to the notification area to create new notifications, as well as edit, delete, and disable existing notifications.

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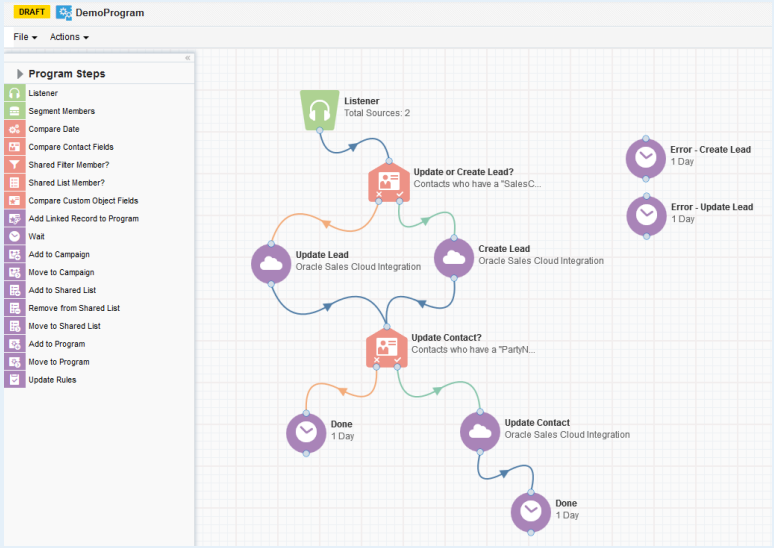
Using the Oracle CX Sales app in a program or campaign

Important: *Oracle Sales* was formerly known as *Oracle Sales Cloud*. All instances of Oracle Sales Cloud have been changed to Oracle Sales across the app user interface.

The Oracle CX Sales Integration app enables you to update or create contact records within a program or campaign.

Example: A listener step could be configured to listen for contacts who complete a form. Once the contact is added to the [program canvas], you may want to decide to create a lead for the contact, depending on the next decision, you can configure this app to either create a contact or update an existing contact within the CRM.



To use the Oracle CX Sales Integration app in a campaign or program:

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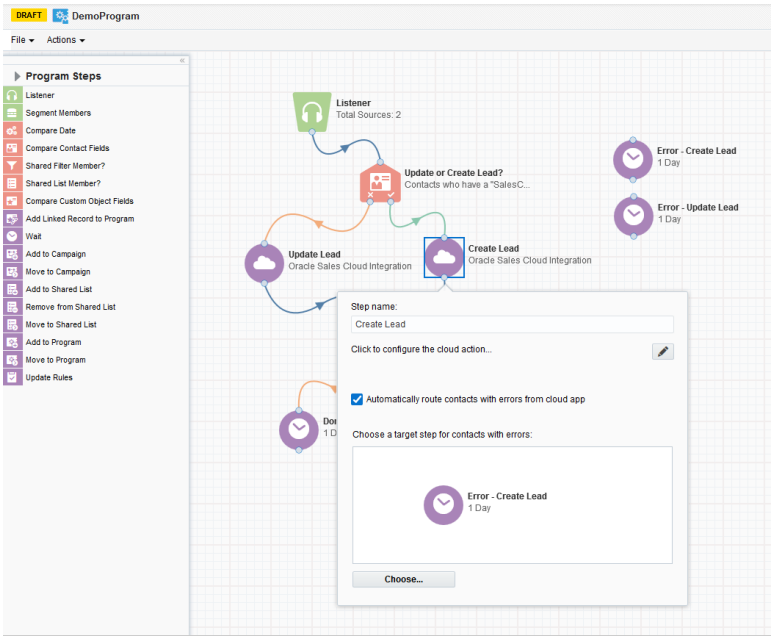
1. Open an existing campaign or program, or create a new one.
2. Click on the *Actions* section to expand it, and view all available action elements, including installed apps.
3. Drag the **Oracle CX Sales Integration** element onto the canvas, then double-click it to open the configure screen.



The window that opens enables you to do the following:

- Change the name of the step to something more meaningful.
- Configure the element.
- Choose to route contacts that resulted in an error to another step (see: configuring campaign elements for more information).

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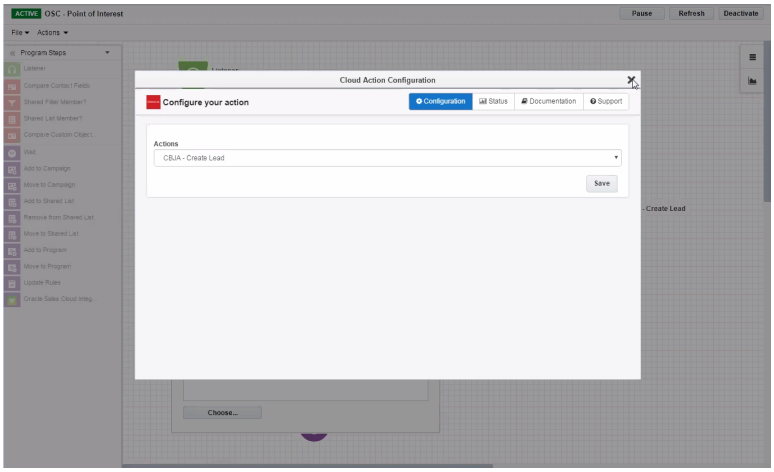
4. Click the **Edit** icon to configure the cloud action.



   a. Click the **Actions** list and select an existing action. If you do not see any existing actions, see configuring actions for more details.

   b. Click **Save**.

   c. (Optional) Click **Status** to see the status of contact processing. The amount of contacts that have been successfully processed, or were processed with warnings or errors will be displayed.

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Viewing report data in the Oracle CX Sales Integration app

Important: *Oracle Sales* was formerly known as *Oracle Sales Cloud*. All instances of Oracle Sales Cloud have been changed to Oracle Sales across the app user interface.

The Oracle CX Sales Integration app provides reporting on the records being synced between Oracle Eloqua and Oracle CX Sales to provide insight into how your syncs are performing. Data is retained for a period of 3 months. The Oracle CX Sales Integration app provides reporting in two different formats:

- A Global Report Dashboard which displays import and action activity for the past seven days.
- Individual reporting for imports and actions that displays activity for a specific import or action for the current day (previous dates are selectable). A table of every import or action execution, including details of created, updated, and failed records and time of execution.

Viewing the global report dashboard in a cloud menu

Important: *Oracle Sales* was formerly known as *Oracle Sales Cloud*. All instances of Oracle Sales Cloud have been changed to Oracle Sales across the app user interface.

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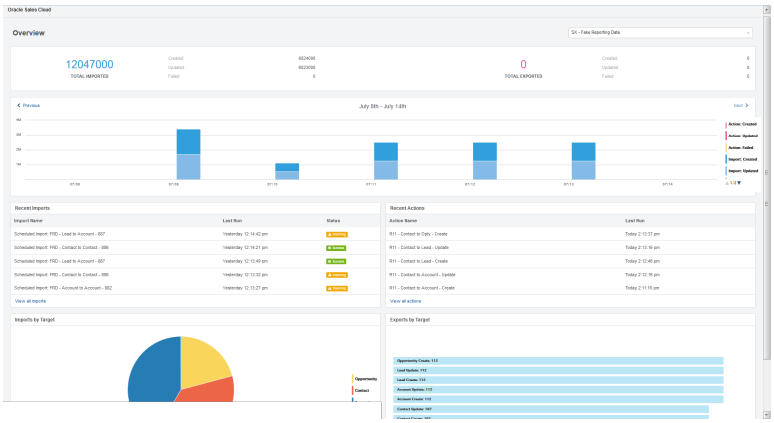
The Oracle CX Sales Integration Reporting Dashboard provides an overview of action and import activity over a span of the last seven days. In this report, the volume of data flowing between Oracle Eloqua and Oracle CX Sales is shown per day, including created, updated, and failed records. The report initially displays the most recent seven days of data, with an option to select a specific seven day period in the past.



The global report dashboard is a cloud menu. Data is retained for a period of 3 months.

To view the global report dashboard:

1. In Oracle Eloqua, you can access this report from a cloud menu in a campaign, program, or My Eloqua.
2. Click **Cloud Content** to open the Cloud Content menu, which lists all available content services.

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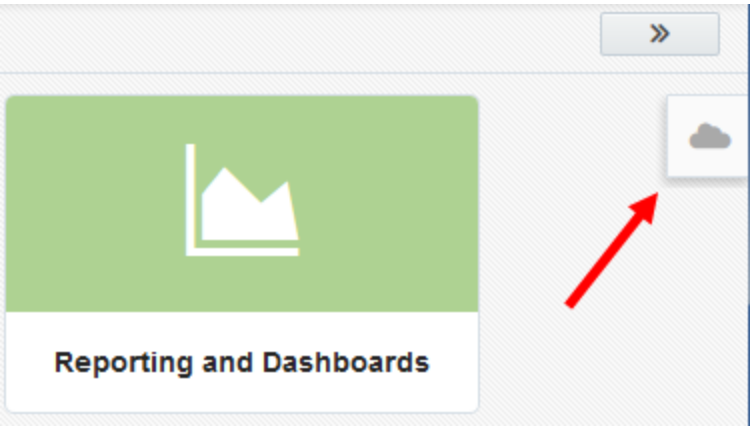
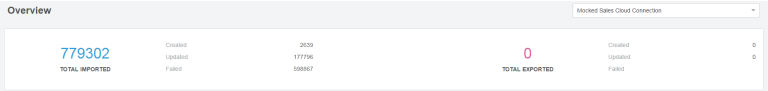
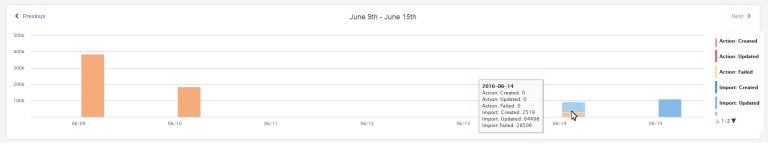


3. Locate the **Oracle CX Sales Integration Reporting Dashboard**, either by scrolling through the list or searching with the search box.
4. Click the menu to open the dashboard.

Select a CRM connection for which you want to view a report. An overview of the total amount of imports and exports over the current seven day period that were created, updated, or failed are displayed.



You can view the amount of records created, updated, or failed over a seven day period with an option to view the details for each specific day by mousing over the day. Here, you can view reports for a specific seven day period in the past.



Viewing recent imports and actions

The report also displays recently successful imports and actions and the date and time they were last successful.

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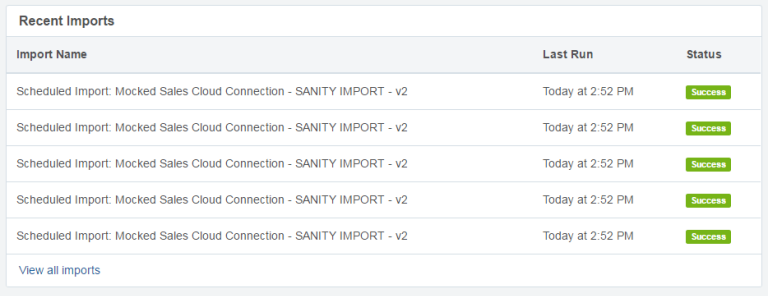
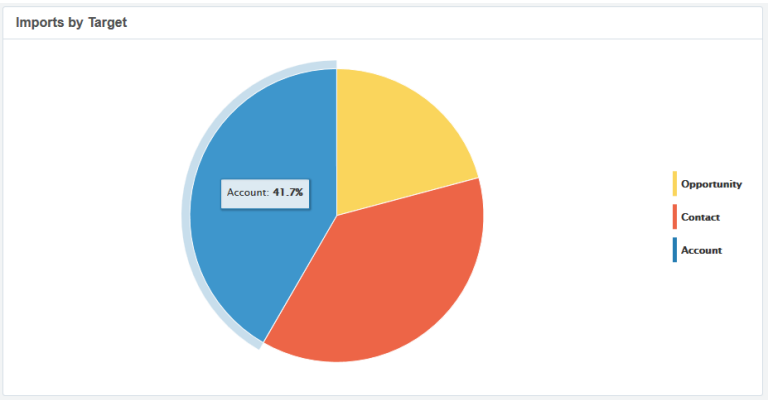
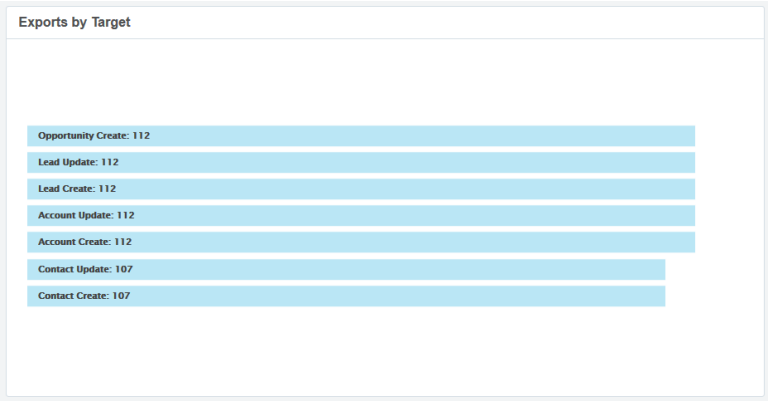


Viewing imports and exports by target

Import data is categorized and displayed in a pie chart to help visually identify how many records are being imported into Oracle Eloqua from Oracle CX Sales by target.



The *Exports by Target* bar chart displays all records within the period so you can view how many records were created or updated from Oracle Eloqua to Oracle CX Sales, categorized by target.



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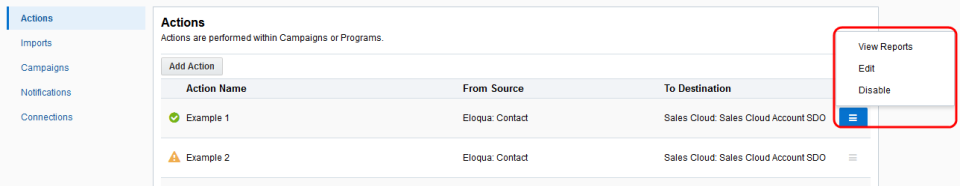
Viewing report data for actions and imports

Important: *Oracle Sales* was formerly known as *Oracle Sales Cloud*. All instances of Oracle Sales Cloud have been changed to Oracle Sales across the app user interface.

Individual reporting for Oracle CX Sales Integration app actions and imports displays activity for a specific import or action for the current day (previous dates are selectable). A table of every import or action execution, including details of created, updated, and failed records and time of execution. Data is retained for a period of 3 months.

To view report data for actions or imports:

1. In the Oracle CX Sales Integration app, click **Actions** or **Imports**.
    a. To view reports for campaign actions, click the **Campaign Actions** tab.
2. Locate the action or import for which you want to view report data, click the list and select **View Reports**.



Action report data

Action reports are available for step actions and campaign actions. These reports provide useful information about the records that are flowing from Oracle Eloqua into Oracle CX

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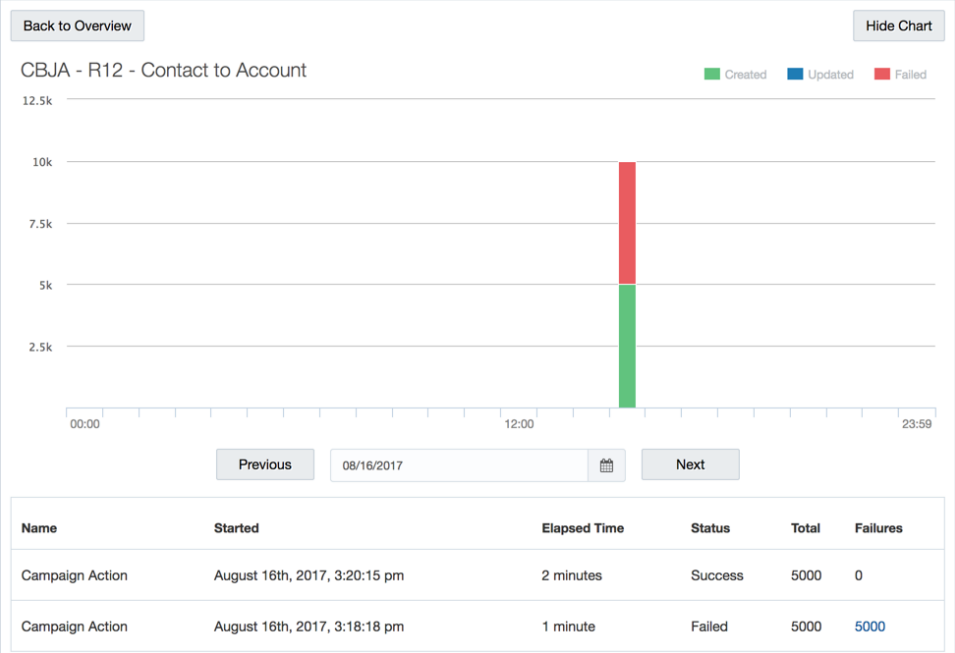
Sales.

For step actions, view how many records were created or updated for each sync, how many were processed per hour, how long the sync took to complete, and whether or not the sync was successful.



For campaign actions, view whether the campaigns exported from Oracle Eloqua to CRM were successful and a daily history of your campaign exports.

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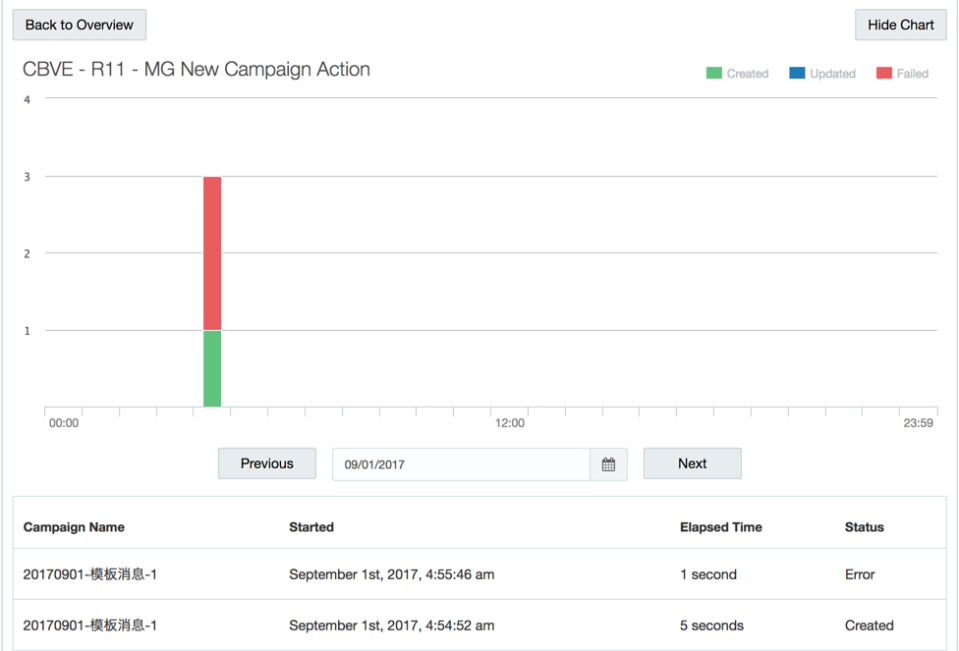

Click a table row to view more details of the data sent over, sent date, and error messages.

Import report data

Import reports provide insight into how your imports are performing by displaying a chart of how many records are being created, updated, or have failed to import. You can also view how many objects were imported into Oracle Eloqua campaigns from CRM, which ones were successful, and how many failed.

Each report displays an import schedule of when syncs started, how long the sync took to complete, whether or not that sync was successful, and how many records were created, updated, or failed during that sync. When an import is running, click the import to view the progress.

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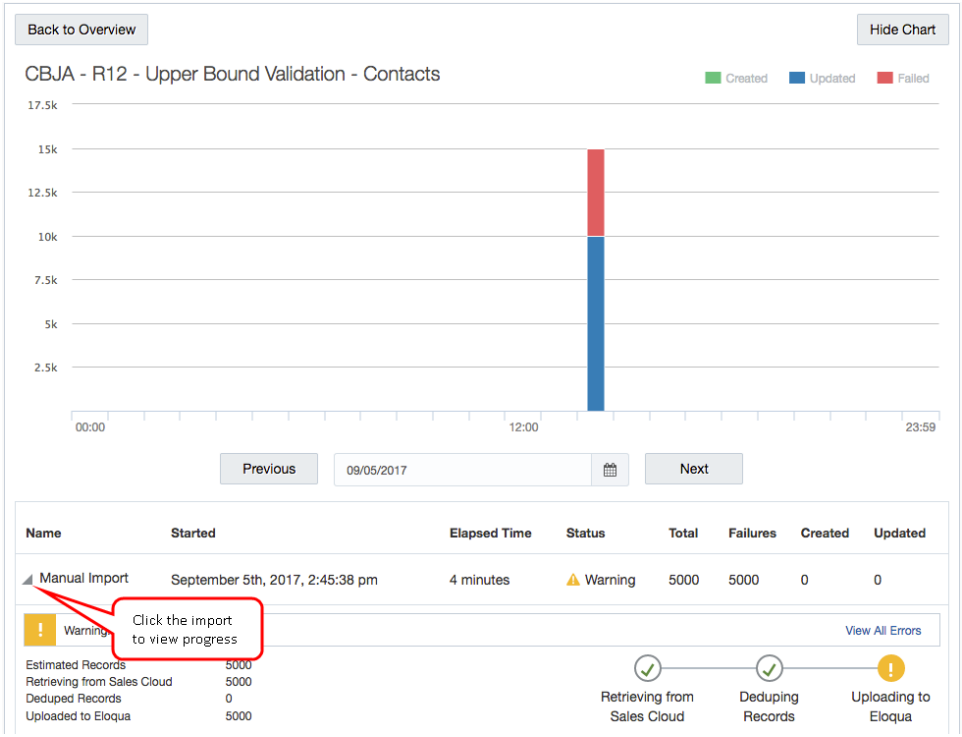

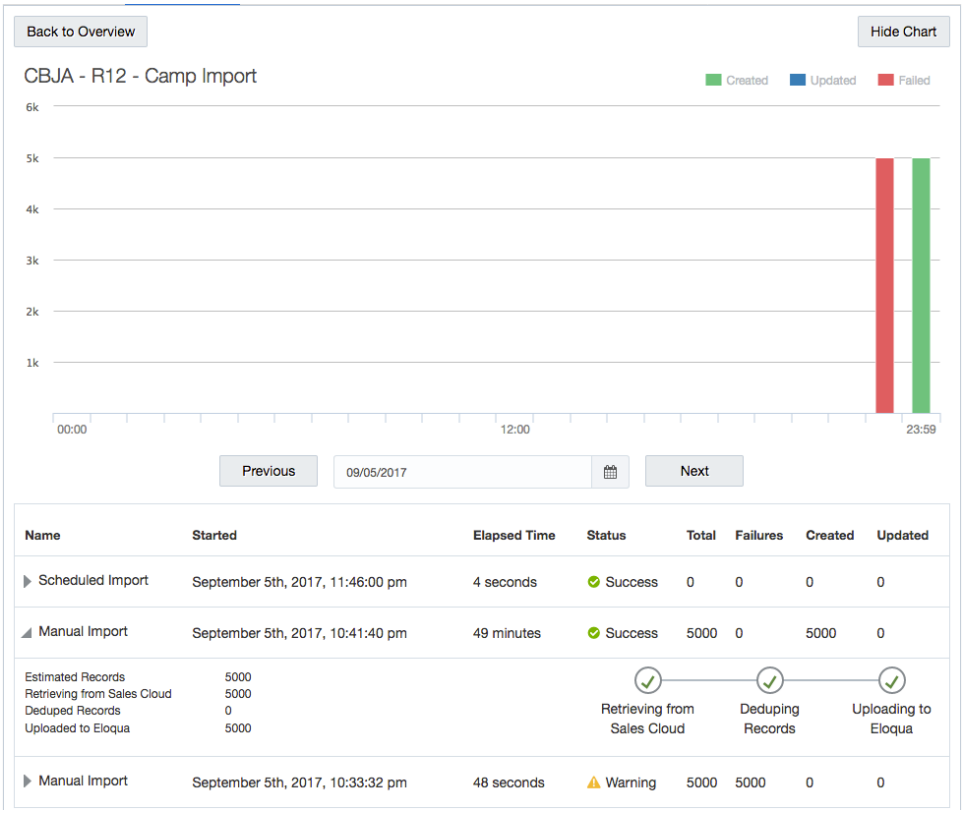

The status of the import is displayed including:

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- Import data
- When the import started
- How long the import took to complete
- The number of records with their status

There are three stages to a successful import; records are retrieved from Oracle CX Sales, deduplicated, and uploaded to Oracle Eloqua. The message *Retrieving from CX Sales* indicates your import is successfully running.

You can manually stop an import if it is running and has not yet reached the *Uploading to Eloqua* step. Once the *Uploading to Eloqua* step is started, the import cannot be stopped and will continue to completion. Stopped imports cannot be resumed. You must run the import again. Learn more about creating and scheduling imports.

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Example programs

Important: *Oracle Sales* was formerly known as *Oracle Sales Cloud*. All instances of Oracle Sales Cloud have been changed to Oracle Sales across the app user interface.

You can use the Oracle CX Sales Integration app for various marketing qualification processes and lead generation. You can use Oracle Eloqua's program canvas to design programs that will update and create leads and contacts in Oracle CX Sales based on the following recommended programs:

- Create Unique: In this program, a new lead record is created in Oracle CX Sales only if there is no contact or lead record with the same email address in Oracle CX Sales. If there is an existing contact record, the contact record is updated with contact information as defined in the *Update Contact* action.
- Hybrid: In this program, a new lead is created in Oracle CX Sales only if there is no unconverted lead record with the same email address in Oracle CX Sales. Existing unconverted lead records in Oracle CX Sales are updated with contact information as defined in the *Update Contact* action.
- Point of Interest: A new lead record is created if there are no leads with the same email address in Oracle Sales, but an Oracle CX Sales contact already exists. If there is an existing contact record, the contact record is updated with contact information from Oracle Eloqua as defined in the *Update Contact* action.
- Automatic Opportunity Qualification Program: The Automatic Opportunity Qualification Program is a discretionary part of Oracle Guided Campaigns, and it is designed to automatically create new Sales Leads and Opportunities based on responses in account-based marketing

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campaigns. Currently, related data flows are supported in the context of Eloqua CX Sales CRM integration. For more information, please refer to Oracle Guided Campaigns.

Tip: You can select default assets to automatically create programs.

Creating a create unique program

Important: *Oracle Sales* was formerly known as *Oracle Sales Cloud*. All instances of Oracle Sales Cloud have been changed to Oracle Sales across the app user interface.

You can use Oracle Eloqua's program canvas to manually configure a create unique program or you can select default assets to automatically create programs.

Default create unique program:

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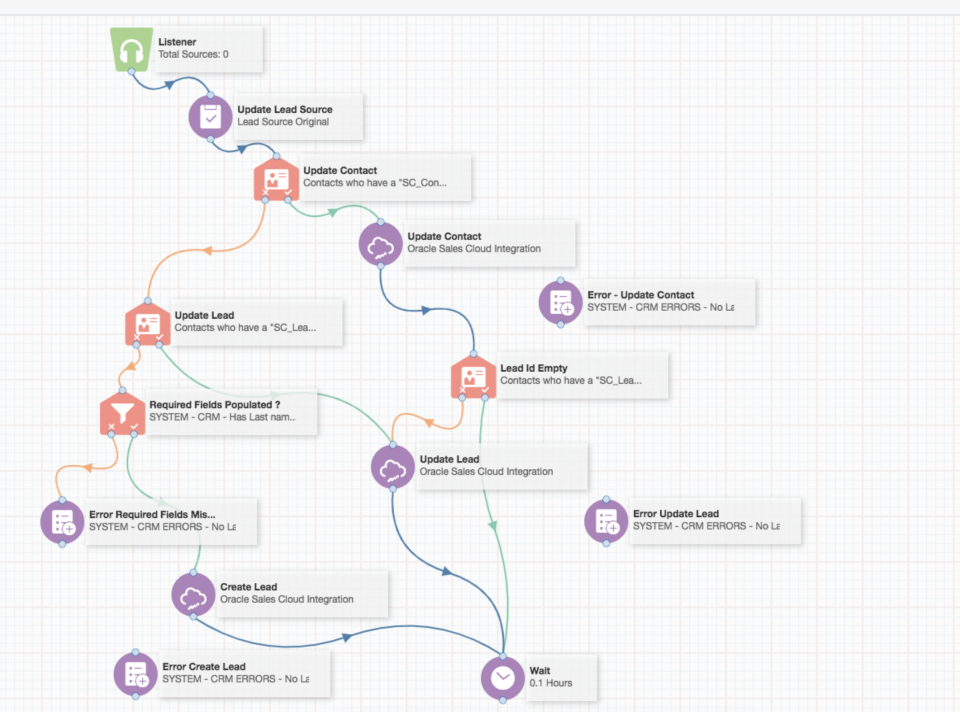

In this program, a new lead record is created in Oracle CX Sales only if there is no contact or lead record with the same email address in Oracle CX Sales. If there is an existing contact record, the contact record is updated with contact information as defined in the *Update Contact* action.

Note: Determining whether an Oracle CX Sales (formerly Oracle Sales Cloud) contact or lead exists depends on configuring an import for both Oracle CX Sales leads and contacts with the appropriate record IDs. For details, see recommended contact and account fields.

To create an Oracle CX Sales Create Unique program:

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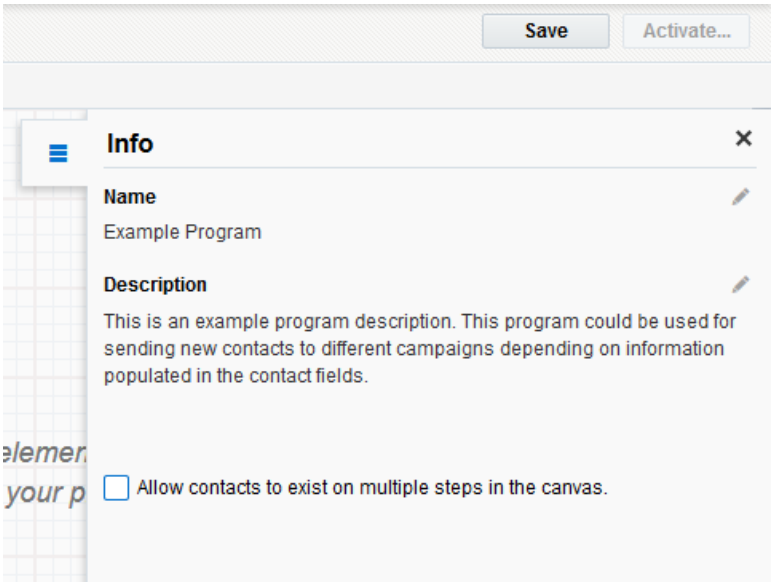
1. Navigate to **Orchestration**, then click **Programs**.
2. Click **Create a Contact Program**
3. Select a blank template.
4. Configure basic information about the program:
    a. Click **Info** on the left side of the canvas, and add a **Name** and **Description** of the program.



    b. To allow a contact to enter the program more than once, select **Allow contact to exist on multiple steps in the canvas**. If you do not select this option, once a contact enters a program, the contact cannot enter the program again from another entry point.
    c. Click **X** to close the *Info* window.
5. Add the **Listener Step** to the canvas:
    - Name the step *Start - Create Unique*.
    - To subscribe to data using a listener step, double-click **Listener Step**.
    - Add any data sources that are part of your lead flow. For example, form submissions, lead nurturing programs or campaigns that generate leads.
6. Add an **Update Rule** action step. Name the step *Lead Source*. Configure the *Rule Set* option to **Lead Source Original**.

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7. Add a **Compare Contact Fields** decision step. Name the step *Update Contact?* This step evaluates and routes contacts based on a specified value in a selected contact field. Set the step to route contacts based on whether they have an *Oracle CX Sales Contact Registry ID*.
    a. For the *yes* path, add a **Oracle CX Sales Integration** action to update information for existing Oracle CX Sales contacts. Name this step *Update Contact*.
    b. For the *no* path, add a **Compare Contact Fields** decision to route contacts based on whether they have an *Oracle CX Sales Lead ID*. Name this step *Update Lead?*
8. For the Update Lead? step, add the following paths:
    a. For the *yes* path, add a **Shared Filter Member?** action. Name this step *Required Fields Populated?*. This step evaluates whether shared filter members have required contact fields (such as name, company, and so on). Add an **Oracle CX Sales Integration** action named *Create Leads* and connect it to the *yes* path to create leads for filter members with the required contact fields.
    b. For the *no* path, add an **Oracle CX Sales Integration** action to update information for existing Oracle CX Sales leads. Name this step *Update Lead*.
9. Add any necessary wait steps, error flows, shared list actions, and Oracle CX Sales app actions as depicted in the workflow.
10. Click **Save**.
11. Activate your program.
12. Monitor the performance of the program using operational reports. If you need to change your program, you must disable the program.

The following example canvas illustrates a manually-configured create unique program:

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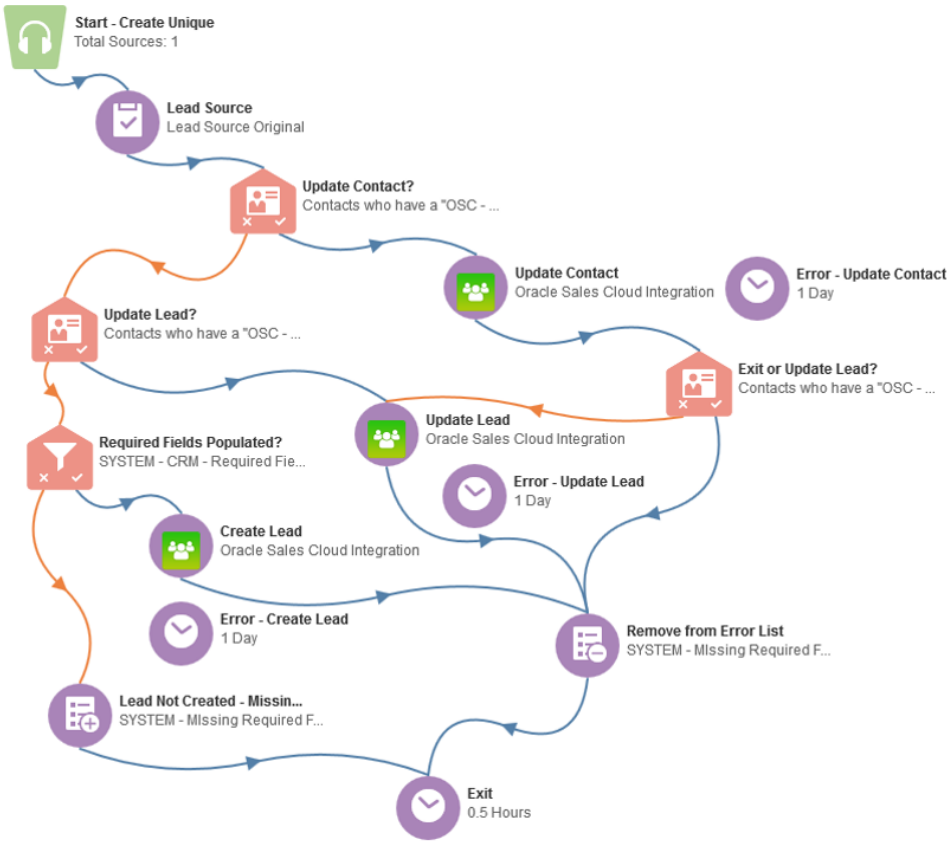

Creating a hybrid program

Important: *Oracle Sales* was formerly known as *Oracle Sales Cloud*. All instances of Oracle Sales Cloud have been changed to Oracle Sales across the app user interface.

A hybrid program creates new leads and updates existing contacts and leads in Oracle Sales. If leads with the same email address do not yet exist, the hybrid program determines whether the contacts are valid CRM contacts by checking certain fields (such as last name or company name) before creating a lead in the CRM system.

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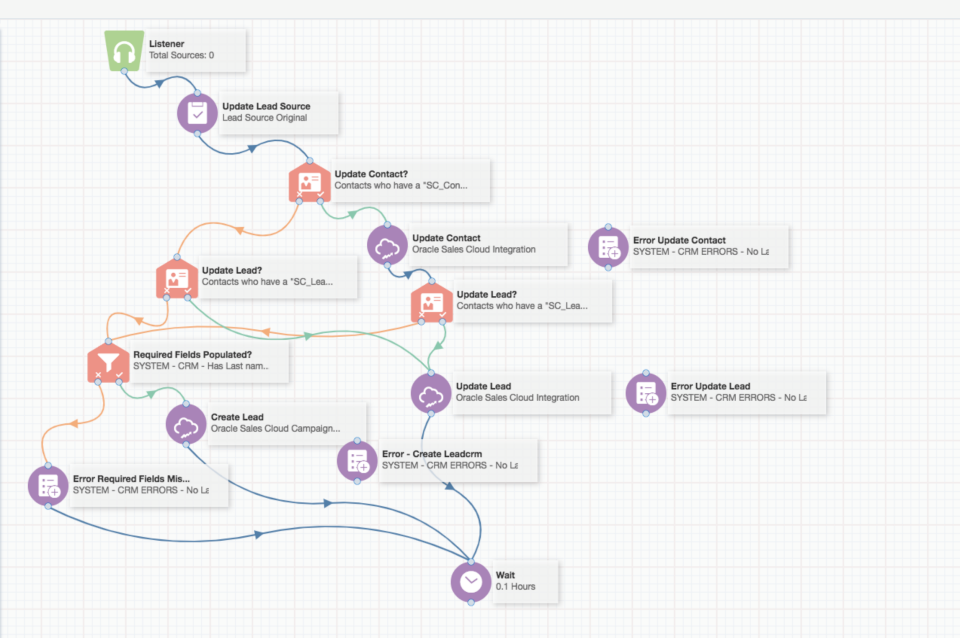
Note: Determining whether an Oracle CX Sales (formerly Oracle Sales Cloud) contact or lead exists depends on configuring an import for both Oracle CX Sales leads and contacts with the appropriate record IDs. For details, see recommended contact and account fields.

You can use Oracle Eloqua's program canvas to manually configure a hybrid program or you can select default assets to automatically create hybrid programs.

Default hybrid program:



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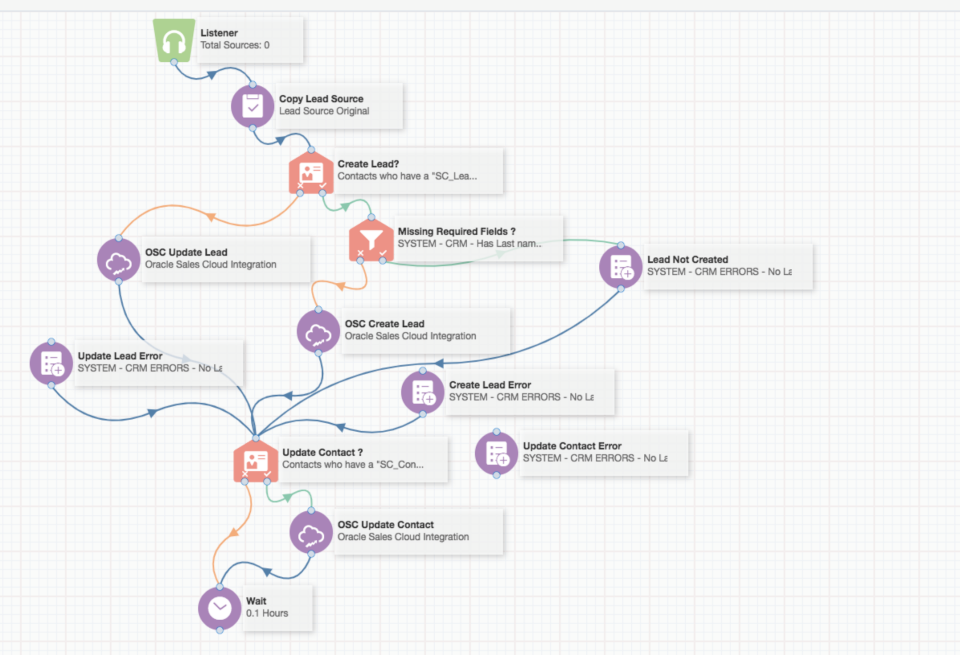
Creating a point of interest program

> **Important**: *Oracle Sales* was formerly known as *Oracle Sales Cloud*. All instances of Oracle Sales Cloud have been changed to Oracle Sales across the app user interface.

You can use Oracle Eloqua's program canvas to manually configure a point of interest program or you can select default assets to automatically create programs.

Default point of interest program:



A new lead record is created if there are no leads with the same email address in Oracle Sales, but an Oracle CX Sales contact already exists. If there is an existing contact record, the contact record is updated with contact information from Oracle Eloqua as defined in the *Update Contact* action.

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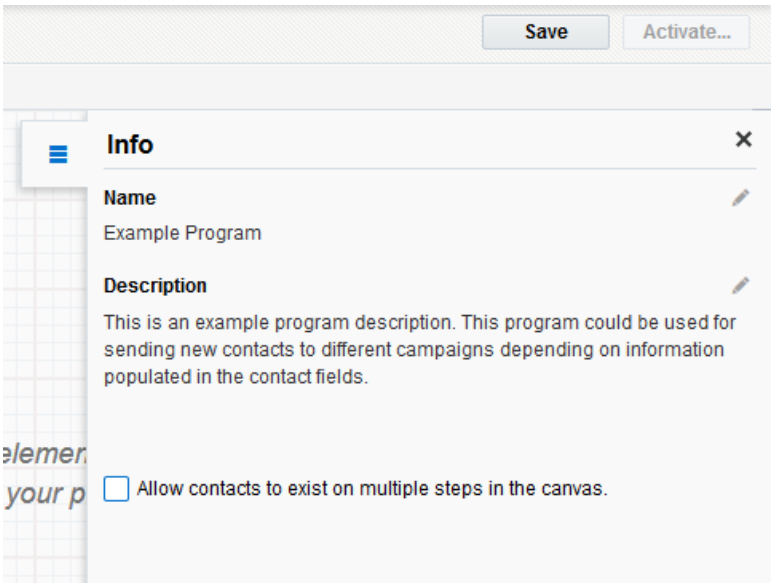
Note: Determining whether an Oracle CX Sales (formerly Oracle Sales Cloud) contact or lead exists depends on configuring an import for both Oracle CX Sales leads and contacts with the appropriate record IDs. For details, see recommended contact and account fields.

To create an Oracle CX Sales point of interest program:

1. Navigate to **Orchestration**, then click **Programs**.
2. Click **Create a Contact Program**
3. Select a blank template.
4. Configure basic information about the program:
   a. Click **Info** on the side of the canvas, and add a **Name** and **Description** of the program.



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b. To allow a contact to enter the program more than once, select the **Allow contact to exist on multiple steps in the canvas** check box. If you do not select this option, once a contact enters a program, the contact cannot enter the program again from another entry point.

c. Click **X** to close the *Info* window.

5. Add the **Listener Step** to the canvas:
   - Name the step *Start - Point of Interest*.
   - To subscribe to data using a listener step, double-click **Listener Step**.
   - Add any data sources that are part of your lead flow. For example, form submissions, lead nurturing programs or campaigns that generate leads.

6. Add an **Update Rule** action step. Name the step *Lead Source*. Configure the *Rule Set* option to **Lead Source Original**.

7. Add a **Compare Contact Fields** decision step. Name the step *Create a Lead?* This step evaluates and routes contacts based on a specified value in a selected contact field. Set the step to route contacts based on whether they have an *Oracle CX Sales Lead ID*.
   a. For the *yes* path, add a **Shared Filter Member?** action. Name this step *Are Required Fields Populated?*. This step evaluates whether shared filter members have required contact fields (such as name, company, and so on). Add an **Oracle CX Sales Integration** action named *OSC - Create Lead* and connect it to the *yes* path to create leads for filter members with the required contact fields. For the *no* path, move members to an **Add to Shared List** action named *Lead Not Created - Missing Fields*.

   b. For the *no* path, add an **Oracle CX Sales Integration** action to update information for existing Oracle CX Sales leads. Name this step *OSC - Update Lead*.

8. Add a **Compare Contact Fields** decision step. Name this step *Update Contact?*
   a. For the *yes* path, add an **Oracle CX Sales Integration** action to update information for existing Oracle CX Sales contacts. Name this step *OSC - Update Contact*. Connect this step to the *Remove from Error List* step below.

   b. For the *no* path, add a **Remove from Shared List** action. Name this step *Remove from Error List*.

9. Add any necessary wait and error steps.

10. Click **Save**.

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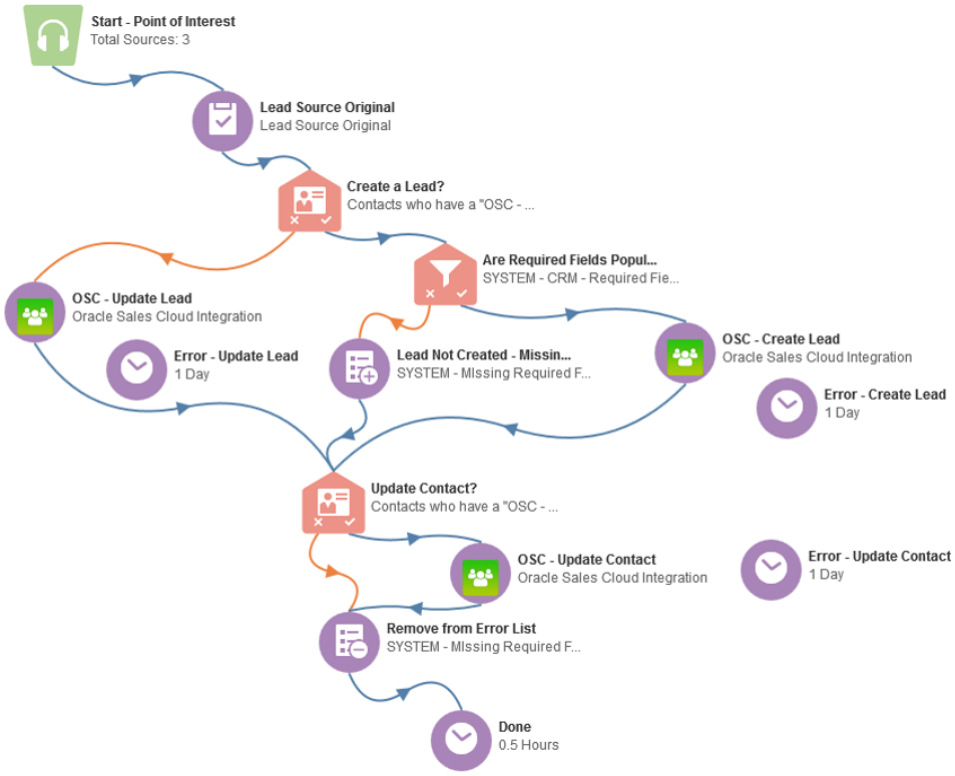
11. Activate your program.
12. Monitor the performance of the program using operational reports. If you need to change your program, you must disable the program.

The following example canvas illustrates a manually-configured point of interest program:



Create an Opportunity Qualification Program

Tip: These instructions are designed for your Eloqua administrator to setup and configure your automated CRM Integration program, so that it will thereafter be available for selection within Oracle Eloqua or Oracle Guided Campaigns for the purposes of Automated Opportunity Qualification.

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The Automatic Opportunity Qualification Program is a discretionary part of Oracle Guided Campaigns, and it is designed to automatically create new Sales Leads and Opportunities based on responses in account-based marketing campaigns. Currently, related data flows are supported in the context of Eloqua CX Sales CRM integration. For more information, please refer to Oracle Guided Campaigns.

Prior to starting your CRM Integration set-up you need the following items enabled within your Oracle Eloqua instance.

- Decision Steps
- Upsert Actions
- Marketing Activity Sync
- Eloqua Campaign Lead Table

To enable these you should raise an Service Request with Oracle Support requesting they enable Guided Campaigns integration features.

CRM Integration program overview

The CRM Integration program needs to be created manually in your Oracle Eloqua instance. It is necessary to include a listener as the input (so that you can push contacts to it from your other programs, or your Oracle Guided Campaigns campaigns). It will also be necessary to include Oracle Sales decision steps and Oracle Sales action steps to validate your contacts for processing.

Integration setup

The integration flow will primarily consist of two elements, the decision steps which will reference your Oracle Sales instance), and the actions which will enact the data synchronization with your Oracle Sales instance.

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Note: All decision and action steps need to be set-up and mapped by your Eloqua Administrator prior to your program setup.

Program actions

Users of Oracle Guided Campaigns can utilize an Account Engagement Score Decision step to evaluate threshold based uniquely on Campaign and Account. there is also a Unity Decision step as part of the Unity Integration App that allows you to score based on your unity data, uniquely by Product and Account.

The program flow will consist of 3 types of actions that need to be configured.

1. Eloqua native program decision steps - these reference the Eloqua contact record.
2. Oracle CX Sales Integration app decision steps - these reference additional Eloqua database tables or the Oracle Sales data housed within the Eloqua database.
3. Oracle Sales Action steps - these are either create, update or upsert calls made to your Oracle Sales instance or additional back-end Eloqua integration database tables.

Imports

There is one type of Import that needs to be configured:

1. Opportunity Import - The purpose of this import is to sync the Opportunity ID created in your Oracle Sales instance to pull it back to Eloqua for association to Leads created within the campaigns.

Below is a diagram showing the template flow for the integration program:

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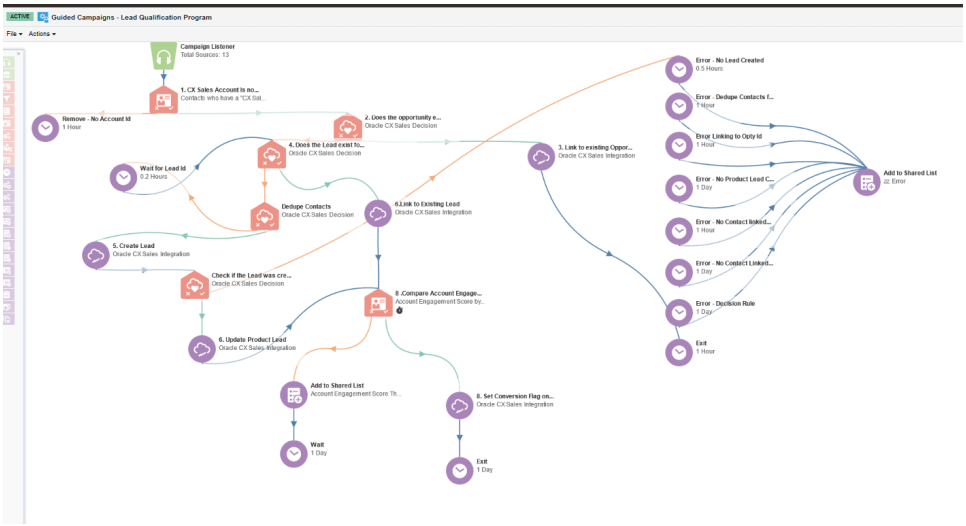

Note: The step numbers below all relate to ones on the above diagram as an illustration.

CRM Integration program setup

Listener)

A listener added to your program will make it feasible to drive contacts into the program from other sources, this is necessary if you wish to add contacts in from your campaigns created within Oracle Guided Campaigns.

The program listener is required as your first step to facilitate the receipt of contacts from your other sources, such as campaigns created in Oracle Guided Campaigns.

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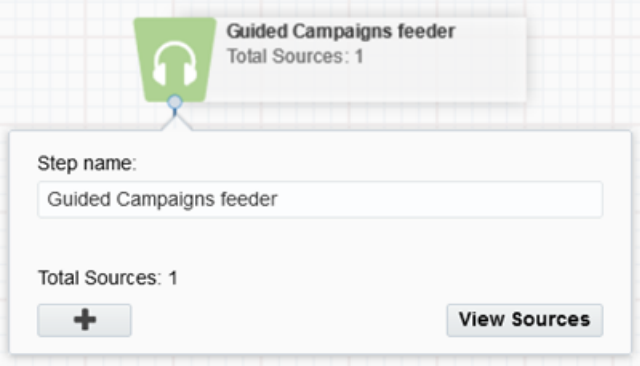
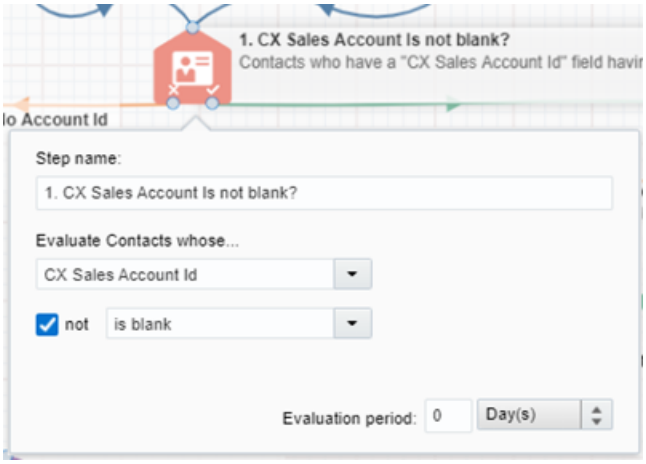


Native Eloqua Decision steps

Step 1: CX Sales Account is not blank

This Eloqua decision step validates whether CRM Account ID is blank. A CRM Account ID needs to be present in your chosen Eloqua field for the Opportunity flow to work as needed.



Step 8: Compare Account Engagement score to 'n'

This Eloqua decision step references the Account engagement score by campaign to compare against your chosen value. The Account Engagement Score by campaign Decision Step is made available to all Oracle Guided Campaigns customers.

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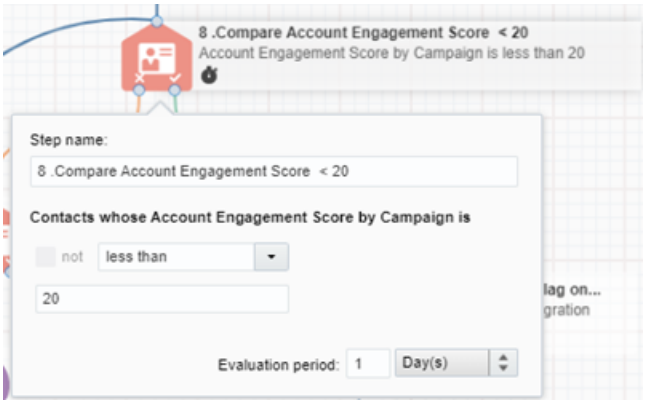

(You can define the score thresholds that you wish to use, as well as the evaluation period)

If you have Oracle Unity you can also use the Unity decision step to get scores from your Unity instance, which is unique by Product and Account

Oracle Sales Integration app decision steps

Oracle CX Sales decision steps use decision rules setup in the Oracle CX Sales Integration app under Decisions. After the rules are setup in the app, you reference them from the integration program using the Oracle CXSales decision step.

The decision steps will reference the records in your Oracle Sales instance or additional data stored in Eloqua to validate that the record has values where necessary, and that those values are valid as far as the requirements for your integration.

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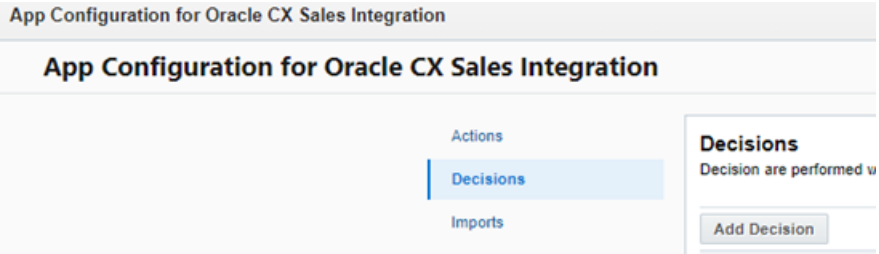
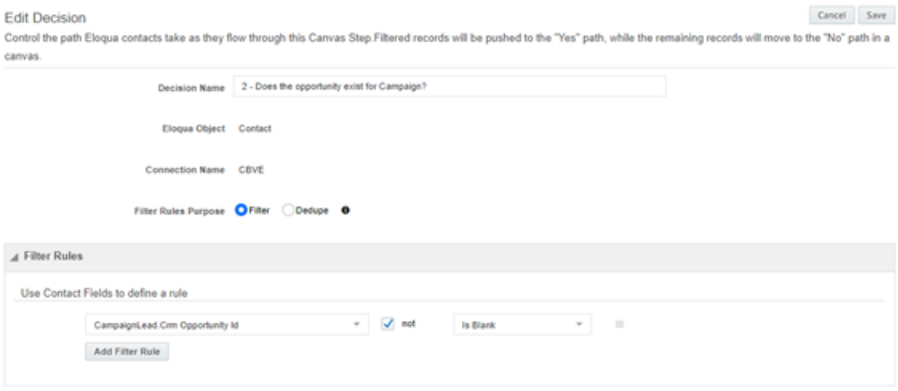
Note: Oracle CXSales decision steps are currently only available to Oracle Guided Campaigns customers. For more details on this, see the Oracle CX Sales Integration app Help Center.

Decision rules are set within the CX Sales Integration app under **Decisions**.



Step 2: Does the Opportunity Exist?

The decision rule is a filter rule that will query the CampaignOpportunity ID along with the CRM Campaign ID referenced from the campaigns. The step needs to validate if that data is blank or not. (if NOT is checked, then value presence will result to true and flow down the yes path.)



Step 4: LeadID is not blank.

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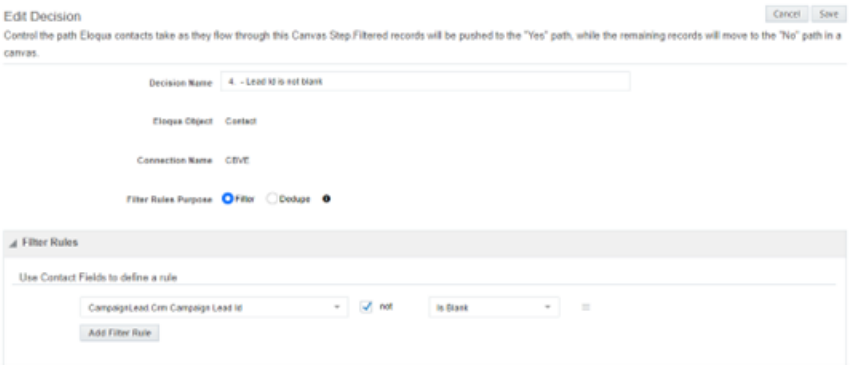
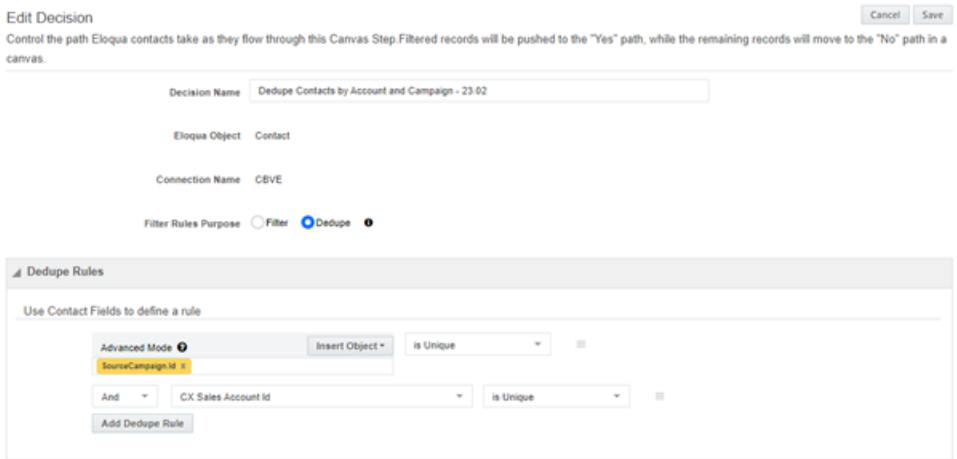
The decision step is a filter rule that will query the CampaignLead ID along with the CRM Lead ID and the CRM Campaign ID referenced from the campaigns.

The step needs to validate if the field is blank or not. (if NOT is checked, then value presence will result to true and flow down the yes path.) The purpose of this is to ensure that only one Lead is created for an Account (per campaign).



Dedupe contacts

This decision step will deduplicate to ensure that only a single lead is created per account (per campaign). This dedupe rule deduplicates by Company name + Campaign ID, to ensure that per processed batch from a single campaign, only one contact for each account is routed down the yes path.



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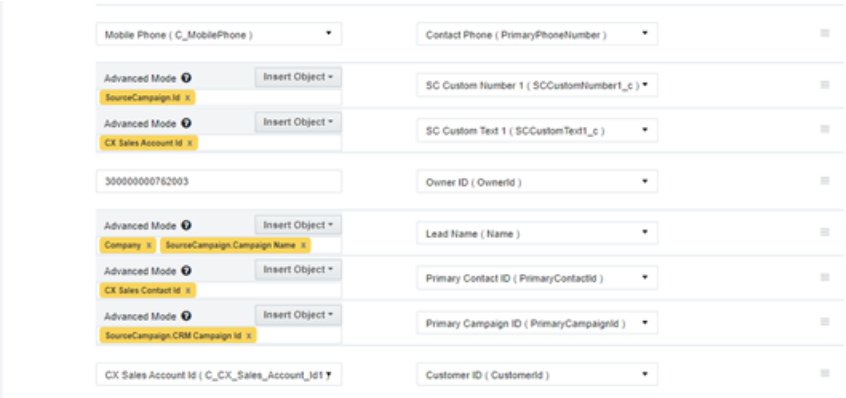
Actions

> **Note**: For more information on creating actions, see the Oracle CX Sales Integration app Help Center.

Step 5: Create Lead

This rule requires a create Lead call. For the core mapping that you wish to set up, Campaign ID **must** be included on this call.



For this step you **must** include these mappings:

- Add Owner_id and its value
- In Advanced mapping mode: Source.CampaignId from Eloqua campaign ID from Campaign Object > mapped into your Oracle Sales campaign number field.
- Add Account Party ID (ES Account ID) on Eloqua contact record mapped into your corresponding Oracle Sales field.

In the Update Callback Section:

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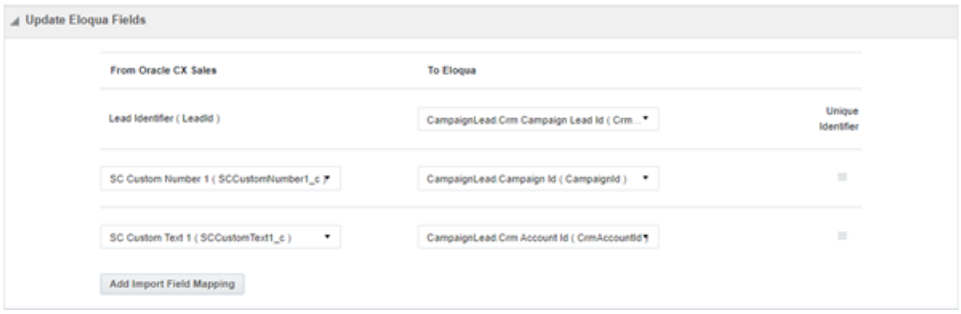
- Add Lead_id mapping to CRM campaign lead ID (Unique identifier)
- Add Oracle Sales campaign number mapping to CampaignId
- Oracle Sales Account Party Id to Eloqua LeadCampaign table's account id field



Step 10: Set Conversion Flag on Lead

Updates the Lead object in Oracle Sales to set the EligibleForConversion flag to true. This requests Oracle Sales to convert the lead to an Opportunity.

- Mapping: CRM Campaign Lead ID to the LeadID field in Eloqua
- Advanced mapping: write the value 'true' to the EligibleForConversion flag field

Note: This process is not immediate and is asynchronous. The updates will occur after the next ESS batch job on the Oracle Sales instance.

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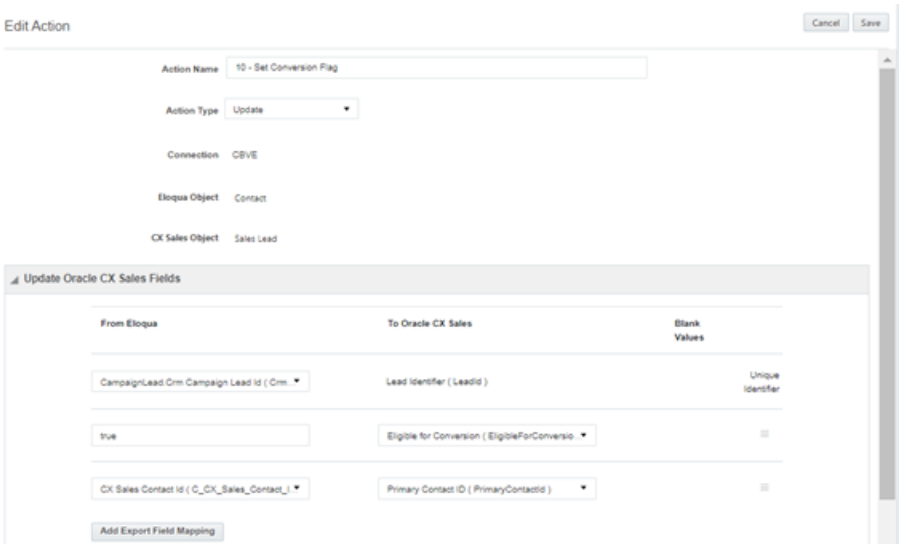

Step 7: Update Lead Product

Updates the SalesLead object in Oracle Sales with the product record and details.

Mapping:

- CRM Campaign Lead ID into LeadID
- Advanced Mapping: into Amount
- Advanced Mapping: into Quantity
- Advanced Mapping: into Product group ID

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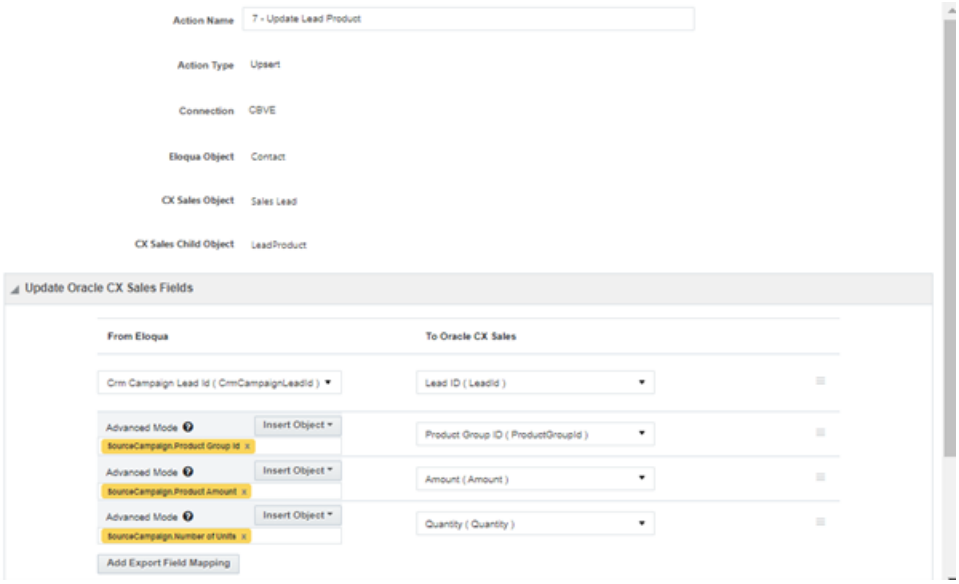
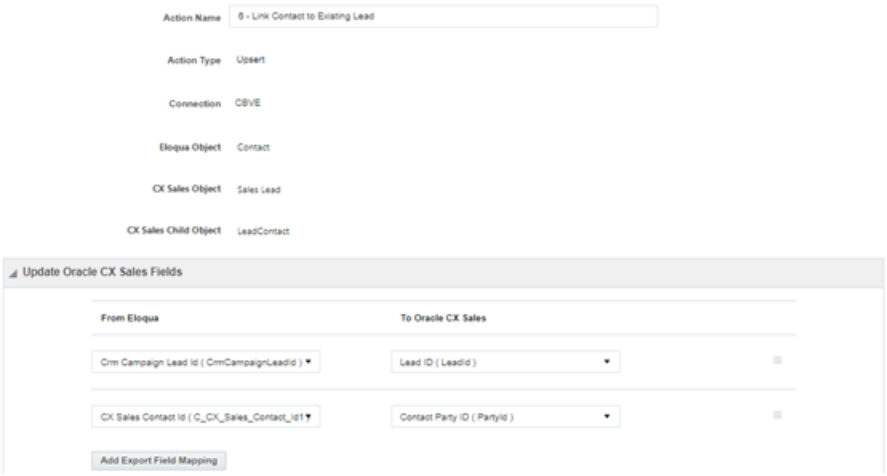


Step 6: Link to Existing Lead

This upsert action step will create an association from the contact to the existing Lead, by creating a LeadContact as a child object of the SalesLead.



Step 3: Link to existing Opportunity

This upsert action step will create an association from the contact to the existing Opportunity object by creating a OpportunityContact as a child object of the Opportunity.

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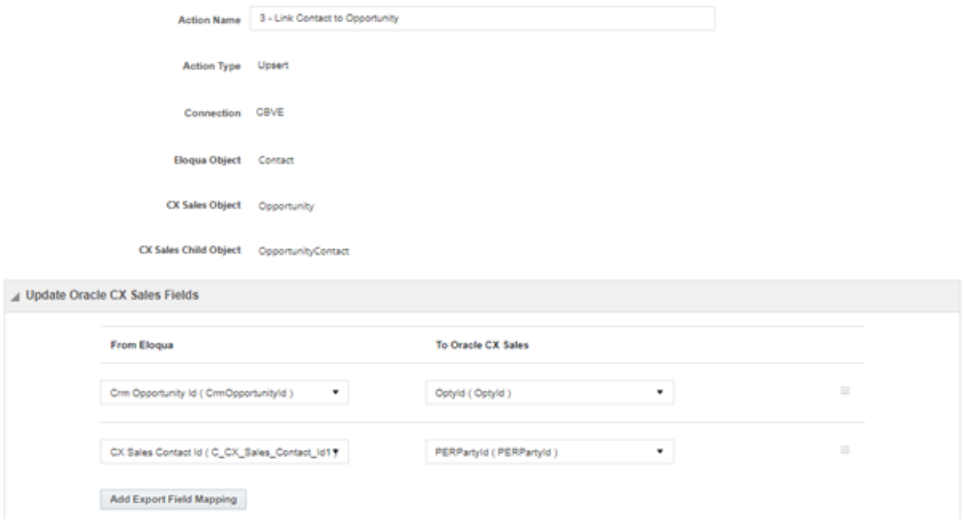
Note: Creation of this object can take up to 15 minutes.



Opportunity Import

Note: For more information on creating imports, see the Oracle CX Sales Integration app Help Center.

Filter

Filter needs to be determined to be able to fetch the data from Oracle Sales. The Filter can be a SQL query including multiple fields.

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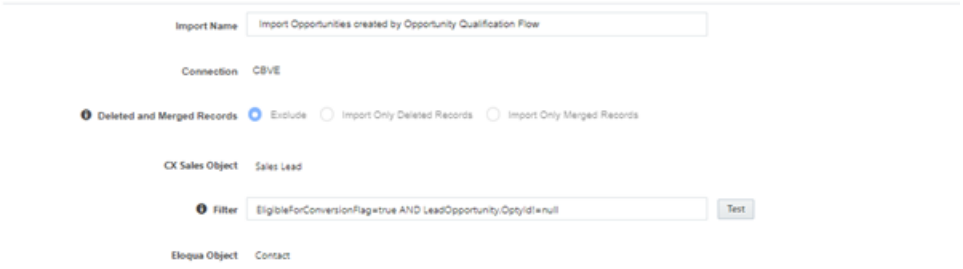
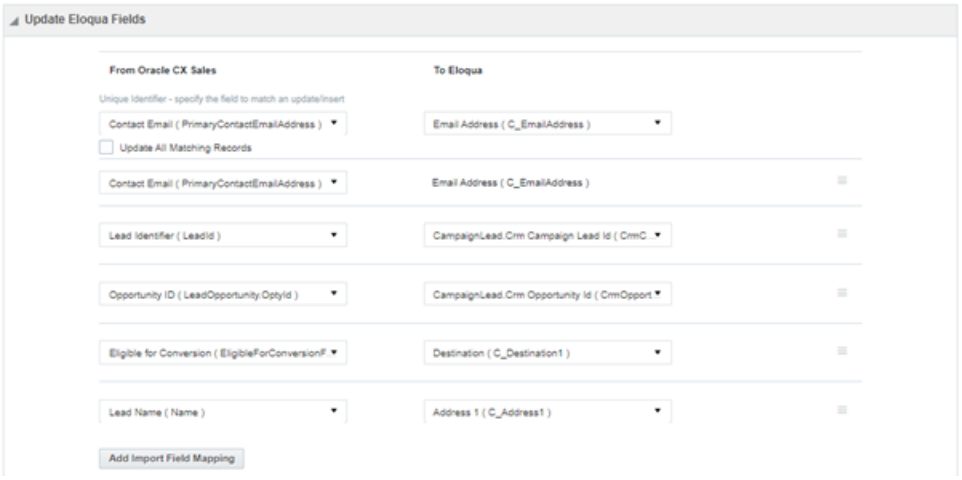


For this filter to function, Opportunity ID needs to not be 'null'.

Mapping



Campaign Lead data in Eloqua

For the Eloqua users of a Oracle Guided Campaigns enabled instance, a new report exists within Eloqua to see the Campaign Lead data that has been created as a result of your Lead or Opportunity qualification configuration as per the above imports and actions.

To access the report, in Eloqua, **Orchestration** **> Campaigns** and then click **Actions > Campaign Leads Report**.

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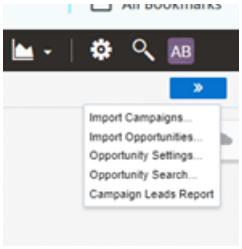
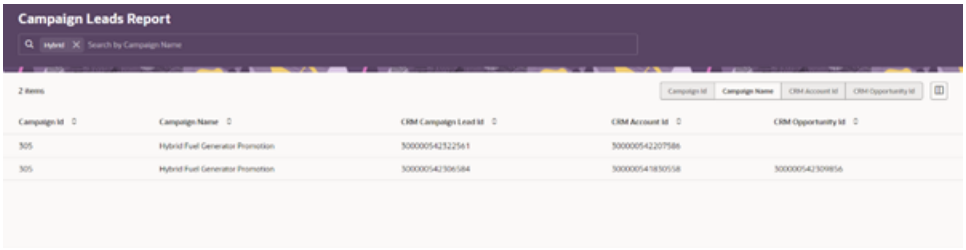


This gives you a new interface that shows you any Leads created by your Lead or Opportunity qualification processes. You can use the search to filter your results, for example to just a Campaign in particular.

Tip: You can use the search to filter your results, for example to just a Campaign in particular:



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