Contents

Profiler ................................................................. 5
Installing Profiler .................................................. 7
  Settings .......................................................... 8
  Apps ............................................................. 9
  App Access ..................................................... 10
Configuring Profiler ................................................. 12
  Settings ........................................................ 12
  Apps ........................................................... 13
  App Access .................................................... 14
Accessing Profiler .................................................. 15
  Profiler URLs .................................................. 16
  Embedding Profiler pages ..................................... 17
  Profiler URL parameters ...................................... 18
Apps for Profiler .................................................... 19
  Installing apps for Profiler .................................... 19
  Managing Profiler app extensions .............................. 20
  Restricting access to a Profiler app using Oracle Eloqua Security Groups .................. 22
Uninstalling apps within Profiler ................................ 24
Searching for contacts in Profiler ............................... 25
Viewing a contact in Profiler ..................................... 28
  Contact details ................................................. 29
  Lead score ..................................................... 31
  Summary tab .................................................. 32
  Activities tab .................................................. 33
### Details tab

- About contact engagement fields
- Email engagement
- Account engagement

### Adjusting the lead score model displayed in Profiler

- How Oracle Eloqua evaluates leads

### Setting up activity notifications

### Viewing email alerts

### Profiler integration

- Embedding Profiler as a subtab in Oracle CX Sales
  - Step 1: Creating a sandbox
  - Step 2: Creating mashup content
  - Step 3: Adding the mashup content to a standard object
  - Step 4: Configure groovy expression
  - Step 5: Publishing your sandbox
- Troubleshooting

- Embedding Profiler into Oracle B2C Service

- Adding a Profiler link to Oracle CX Sales

- Embedding Profiler in CRM onDemand
  - Step 1: Creating a web applet for contact and leads
  - Step 2: Adding webs applet to page layouts

- Embedding Profiler in Microsoft Dynamics 2016

- Embedding Profiler in Microsoft Dynamics 365

- Embedding Profiler in Salesforce Classic
  - Step 1: Creating a Visualforce page for contacts and leads
  - Step 2: Adjusting security for Visualforce pages
<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Step 3: Adding Visualforce pages to contact and lead layouts</td>
<td>89</td>
</tr>
<tr>
<td>Troubleshooting</td>
<td>93</td>
</tr>
<tr>
<td>Embedding Profiler in Salesforce Lightning</td>
<td>94</td>
</tr>
<tr>
<td>Step 1: Creating a Visualforce page for contacts and leads</td>
<td>96</td>
</tr>
<tr>
<td>Step 2: Adjusting security for Visualforce pages</td>
<td>98</td>
</tr>
<tr>
<td>Step 3: Adding Visualforce pages to contact and lead layouts</td>
<td>99</td>
</tr>
<tr>
<td>Troubleshooting</td>
<td>101</td>
</tr>
<tr>
<td>Embedding Profiler in Okta with SSO</td>
<td>102</td>
</tr>
<tr>
<td>Overview</td>
<td>102</td>
</tr>
<tr>
<td>Accessing Profiler as an Okta app</td>
<td>105</td>
</tr>
</tbody>
</table>
Profiler

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

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

See examples of Profiler's responsive design on desktop:

Learn more by watching this video: https://www.youtube.com/playlist?list=PLw7GyH-Hj8cPP6TQfGeDGUYv4Py9k_EwQ
**Note:** Before you can access Profiler, an Eloqua administrator must install the app in your Oracle Eloqua instance. Once installed, the customer administrator can customize the options that Profiler provides. Learn more about installing and configuring Profiler.
Installing Profiler

Before you can use Profiler a user with client administrator rights must install the app and configure the settings for your Eloqua instance.

**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 Profiler app:**

1. Follow the Profiler installation URL provided:

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

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

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

4. Confirm your credentials and click **Sign In**.
5. Configure Profiler:

**Profiler Global Settings**

- **Email Alerts**: Allow creation of Email Alerts
  - Allow creation of Email Alerts by domain
- **Thumbnail Previews**: Show thumbnail previews
- **Search**: Allow search by first name, last name or email
- **Subscriptions**: Show subscription status
- **External Activity**: Auto Ext-Asset
  - Facebook
  - LinkedIn
  - Seminar
  - TradeShow
  - WeChat
  - WebEx
  - Webinar
  - [Youtube/App] Youtube Video Activity

**Social Field Mappings**

- **Facebook**: Facebook
- **Xing**: Xing
- **LinkedIn**: LinkedIn
- **Twitter**: Twitter

**Settings**

a. *Email alerts*: Allow users to create email notifications for contact web visits.

b. *Thumbnail previews*: Allows users to see a thumbnail preview of marketing assets associated to a contact’s activity.
c. **Search**: Allows users to search for contacts in Profiler by contact fields (name, email address, domain, etc.). Otherwise, users can only search by email address.

d. **Subscriptions**: Allows users to view the email address of contacts that have globally unsubscribed. Users cannot email these contacts and a visual indicator indicates the contact's global subscription status. Otherwise, users cannot view the email address of such contacts.

e. **External activity**: Allows users to see external activities in Profiler. Choose the external activity assets that should be visible to users.

**Social Field Mappings**

a. The Social Field Mapping section allows you to specify the social network account links available in Profiler as part of the contact summary. Profiler will build the links to the social network site using the mapped contact field. To link to social network sites, choose the contact field that should be used for each social network.

![Social Field Mappings](image)

**Apps**

a. View and search installed Profiler apps.
App Access

a. Select the security groups which should have access to the Profiler app.

*Note: Users must log out of Eloqua for Eloqua security group changes to take effect.

Allowed Domains

a. Identify which domains are allowed to host Sales Tools pages. For example, if you embed Sales Tools in an iframe hosted by your CRM, add the domain of the page hosting the iframe to your allowlist. You can allow a domain and its sub-domains using a wildcard (*).

To avoid broken iframes, add your CRMs to the Profiler allowlist and Engage allowlist, and update the Sales Tools URLs you have embedded in an iframe to the new URLs. Here is a list of suggested domains for the allowlist based on CRMs:

- **Oracle CX Sales**: *.oraclecloud.com
- **Oracle CRM On Demand**: *.crmondemand.com
- **Microsoft Dynamics**: *.dynamics.com

To learn more about embedding Profiler in different CRMs, see Profiler integration.

6. Click **Accept** or switch users.
The app is now installed and can be viewed in your Apps list (Settings > Apps, under the Platform Extensions section). Select an app to view a description, modify the configuration settings, reinstall, or uninstall it. You can also check its status and dependencies.

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

You can manage how users can use Profiler. For example, manage the ability to create email alerts, what external activity assets are available for viewing, and so on. You can also manage who has access to Profiler apps that have been installed.

**Important:** The configuration process must be done by a user with customer admin rights.

**To configure Profiler:**

1. Log in to Oracle Eloqua.
2. Click **Settings**.
3. Click **Apps** in the *Platform Extensions* section.
4. Select the Profiler app.
5. Click **Configure**.
6. Reconfigure Profiler using the following tabs as needed.

**Settings**

a. *Email alerts*: Allow users to create email notifications for contact web visits.

b. *Thumbnail previews*: Allows users to see a thumbnail preview of marketing assets associated to a contact's activity.
c. **Search**: Allows users to search for contacts in Profiler by contact fields (name, email address, domain, etc.). Otherwise, users can only search by email address.

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- **Oracle CRM On Demand**: *.crmondemand.com
- **Microsoft Dynamics**: *.dynamics.com

To learn more about embedding Profiler in different CRMs, see Profiler integration.

7. Click Save to save your settings.

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

Work with your sales organization to determine the best method for accessing Oracle Profiler. You can use any of the following methods:

- Integrate Profiler with your CRM
  This would allow sales users to access Profiler directly from the CRM. You can embed Profiler as a tab, link to it as a button, etc. Learn more.

- Direct link
  This is a customizable link you can use to launch Profiler directly.

- Use the Oracle Eloqua Sales Tools for Microsoft Outlook add-in
  This is an add-in that your users can install on their own or your IT department can deploy to an entire organization. See Oracle Eloqua Sales Tools for Microsoft Outlook.

- Oracle Eloqua Sales Tools for Google Chrome
  The Google Chrome extension allows sales representatives to access Profiler from their Google Chrome browser. For example, while browsing prospect websites, the sales rep can open the extension to review Eloqua contacts at that company. Reps can also access Engage directly from the extension. Learn more.

**Note:** Before you can access Profiler, an Eloqua administrator must install the app in your Oracle Eloqua instance. Once installed, the customer administrator can customize the options that Profiler provides. Learn more about installing and configuring Profiler.
Profiler URLs

The URL you use to access Profiler depends on the login method that users will use to access Oracle Eloqua. There are three methods: Auto-login, SAML, or direct. The login method you use depends on the security model implemented at your organization. Auto-login and SAML are options that support Single Sign-On (SSO). Salesforce IDP is an option for Salesforce SSO logins. Direct login is for logging in directly through Eloqua.

The following lists the URLs to access the Profiler search page based on these login methods:

- **Direct**: https://login.eloqua.com/apps/salesTools/profiler
- **Autologin**: https://login.eloqua.com/autoLogin?LoginPrefix={Login_prefix}&Url=/apps/salesTools/profiler
- **SFDC IDP**: https://{podURL}/sso/sfdc/v1/svp.aspx?LP={Login_prefix}&RU=/apps/salesTools/profiler

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

LoginPrefix values are a unique four-character code for your Eloqua instance. To add this parameter to your URL, enter LoginPrefix=`{prefix}` where `{prefix}` is replaced with the four-character company name. You can obtain your company’s login prefix in Eloqua by navigating to Settings > Display Preferences > Company Defaults.
Example: In the example image below, the login prefix is EXCO.

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

Embedding Profiler pages

You can embed Profiler pages into an iframe, allowing your users to access Profiler directly from other apps at your organization. For example, embed Profiler directly into your CRM.
To embed Profiler into an iframe:

1. Update the Profiler app with an allowlist of domains that will host Profiler pages. Learn more.

2. Adjust the URLs listed above to include `/embed/` in the URL:
   
   `/apps/embed/salesTools/profiler`

Learn more about Profiler integration.

**Profiler URL parameters**

The URLs above open Profiler to the search page. You can also directly access a contact's record in Profiler using their email address. Simply add the following to the URLs above, and insert the contact's email address where needed:

`/contacts?emailAddress={{emailAddress}}`

Your CRM integration can provide the email address to this URL. Learn more about Profiler integration.
Apps for Profiler

Apps that are available for Oracle Eloqua Profiler are built on Oracle CX Apps, which is the extension framework that partners and customers can use to build apps that are available for multiple applications within Oracle CX Marketing. For more information on Oracle CX Apps, visit the Oracle CX Marketing App Manager Help Center.

In this topic, you'll learn about:

- Installing apps for Profiler
- Managing Profiler app extensions
- Restricting access to a Profiler app using Oracle Eloqua Security Groups

Installing apps for Profiler

Apps available for Profiler can be found in the Oracle Cloud Marketplace (https://cloudmarketplace.oracle.com/marketplace/en_US/homePage.jspx). Once the app is installed in Profiler, you'll be able to manage and configure it from within Oracle Eloqua.

**Important**: The configuration process must be done by a user with client administrator rights.
Installation is a straight forward guided experience that will generally follow these steps:


2. Click on the app listing, then click the **Get App** button.

3. You will be prompted where you want to install the app, if it was built to be used with multiple Oracle CX Marketing products i.e. Eloqua Sales Tools, Responsys or Maxymizer. In this case you will be installing into one of the Sales Tools products. Pick the product where you want to install the app.

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

5. Click **Confirm** to confirm the installation of the app into Oracle Eloqua Profiler.

Although there may be slight variances in the flow, these are generally the steps you will experience when installing an app. After you’ve installed the app, you can review its configuration and control its usage based on your individual needs.

**Managing Profiler app extensions**

Apps installed for Profiler are accessible from within Profiler’s app configuration. This is a bit different from other apps in Oracle Eloqua because apps installed for Profiler do not display in the main *AppCloud Catalog*. You must go into the settings for Profiler itself to locate the apps that you’ve installed just for Profiler.
To manage Profiler app extensions from within Oracle Eloqua:

1. Click **Settings** in the global header.

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

3. Find and open the Profiler app.

4. Click **Configure**.

   - **Warning:** Selecting the **Reinstall** option for an app will force you to go through the entire installation process again. The app will be unavailable for all users during the reinstall.

5. Click the **Apps** tab.

6. Click on the app to open the configuration options for that app.

7. You can perform the following actions:
   - **Get Dependencies**: View any assets that are using the app's services and would be affected if the app was uninstalled.
   - **Configure**: Allows Marketing Administrators to set up the extension directly from Oracle Eloqua.
   - **Uninstall**: Uninstall and remove the app from your Profiler instance.
   - **Services**: View the kinds of services you currently have under the app.
Restricting access to a Profiler app using Oracle Eloqua Security Groups

There are certain circumstances where you may want to restrict who can access an app installed in Profiler. A couple of use cases to consider:

- You are running an app pilot with a select set of trusted power users within the sales team.
- The app is provided by a third party and requires a paid license that is not available to all sales users i.e. an account based application where licenses are only available for strategic account managers and not inside sales.
- The App Access section within Profiler’s global settings will allow you to control who has access to an app you’ve installed.

1. Click **Configure** in the Profiler page of the AppCloud Catalog.
2. Open the **App Access** tab.
3. Check the box beside *Allow access only to these to security group(s)*.

⚠️ Note: When an app is installed, it is available to all users by default. If the box beside *Allow access to security groups* is checked but no security groups are selected, then all security groups are granted access.

4. From the *Select a security group* drop-down, select the Oracle Eloqua security groups containing users that should be granted access to the Profiler app.
**Important:** The listed security groups have been configured in Eloqua. Additionally, modifying access settings will immediately change access for users, including deletion of user settings.

5. Click **Save**.
Uninstalling apps within Profiler

Apps installed for Profiler can be uninstalled from within Profiler's app configuration.
This is a bit different from other apps in Oracle Eloqua because apps installed for Profiler do not display in the main AppCloud Catalog. You must go into the settings for Profiler itself to locate the apps that you've installed just for Profiler.

**To delete Profiler app extensions from within Oracle Eloqua:**

1. Click **Settings** in the global header.

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

3. Find and open the Profiler app.

4. Click **Configure**.

5. Click the **Apps** tab.

6. Click on the app to open the configuration options for that app.

7. Click **Uninstall** to uninstall and remove the app from your Profiler instance.
Searching for contacts in Profiler

Profiler allows you to view contact information and Oracle Eloqua marketing activities using a convenient and device friendly interface.

You can search for contacts by:

- First name
- Last name
- Email address
- Title

After you have search results, you can further filter the results by:

- Title
- Account
- City
- Email domain

To search for a contact in Profiler:
1. Select the icon in the upper right-hand corner of the Profiler screen.

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

2. Type your search words in the *Search* bar. You can search by a contact’s *First Name, Last Name, Email Address,* or *Title*. The search is not case-sensitive. The results display a list of all contacts who have a matching contact field that *starts with* your search criteria.

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

3. (Optional) Filter your search results by clicking **Filter**. The filter panel displays on the right.
   - Filter by title, account, city, or domain, and click **Apply**. Filtering shows users that match *all* of your filtering criteria (using an **AND** operator).
   - Click the X next to a filter to remove it. To remove all filters, click **Clear**.

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

After your first visit to Profiler, a recently-viewed contacts list is displayed on the homepage. This convenient list makes it easier to locate the contacts that you may be dealing with on a regular basis, or with whom you are attempting to establish a connection. From this recently viewed list you can select the contact's name and you are taken directly to their contact record.
Viewing a contact in Profiler

When you open a contact record in Profiler, you can view details about the contact as well as valuable information about the contact's interactions with your organization's marketing materials and website.

Good to know

Note the following:

- Profiler shows marketing related activity, such as email opens, clicks, form submissions, and so on. The following lists the activities available in Profiler:
  - **Email Sends**: The number of emails sent to this contact.
  - **Emails Opens**: The number of times emails were opened by the contact.
  - **Emails Clicks**: The number of times that links in an email were clicked.
  - **Web Page Visits**: The number of visits to tracked web pages.
  - **Form Submissions**: The number of forms that were submitted by the contact.
• **External Activities**: The number of non-Eloqua (external) activities, such as attending a webinar, trade show, and so on. Your administrator decides what external activities are available in Profiler.

• If you see activities repeated within minutes of each other, this could be the result of anti-virus software scanning email links and images.

• Email thumbnails provide a view of the email as it was sent to the contact. You can use the preview link to view the full email. Since content in an email can be dynamic and personalized, the preview of the email may be different than the thumbnail.

• An email preview link is available for 120 days after the send date.

• By default, you can view 1 year of activities for the contact. You can view older activities by using the date filter on the Activities tab. For more details, see the Activities tab details below.

### Contact details

Use the left panel to learn about the contact and how to reach them. Profiler provides you with a number of ways of reach out to the contact.
Call the contact. If you are using your mobile device, you click to call the contact.

Reach out to the contact via email. Clicking the email address opens a new message in Engage or your default email client.

Locate the contact using Google Maps. If there is an address for the contact, use this feature to map to the contact's location.

Reach out to the contact via LinkedIn. Clicking this icon opens the contact's LinkedIn profile. Your administrator manages whether this and other social links are available. Learn more about enabling these fields.
Note: Bounced back or unsubscribed. This icon indicates that you cannot send a message to this contact, because the email address bounced back or the contact is globally unsubscribed.

Before reaching out to a contact, arm yourself with information about the contact’s interaction with your organization by reviewing the details on the tabs in Profiler.

To review more details about the contact from the Oracle Eloqua contact record, open the Details tab.

Lead score

A lead score is displayed for each contact in Profiler. This value is based on the lead scoring models configured for Oracle Eloqua. Your administrator manages which models are available to you. Learn more about lead scoring and changing the lead score model. To change the lead score model displayed, click the lead score and choose from the models available to you. After you make a choice, Profiler displays this model for all contacts.
Summary tab

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

- **Activities**: This chart shows all the contact's activities within a specific date range. You can use the calendar icon in the upper right-hand corner of the graph to change the date range, select 30 days, 6 months, or 1 year as needed. By default, all activity types are shown, tap or click the activity type label below the graph to hide the corresponding data. To view the full activity details for each bar on the graph, simply click an individual bar and the Activities tab opens displaying the included activities in detail.
• **Latest Activities:** This section shows the contact's activities from the last year. Expand the activity to view more details about the activity, such as a preview of the email or web page. This can give you a good idea about the contact's interests.

• **Activity Breakdown:** This section provides a breakdown of the contact's activities over the last year, these are the same categories that are represented in the activities chart. The activities are grouped based on type. Click or tap any activity type to view more details in the Activities tab.

**Activities tab**

This tab shows you all of the contact's activities by date and time. You can expand an activity to view more details about it, such as a thumbnail view of an email or web page, or links that were clicked. Emails can also be previewed fully for up to 120 days after the send date.
You can search for activities on or before a specific date. Click Filter and choose a date. This returns activities on or before this date up to the last 25 months of activities.

Details tab

This tab provides you with more information about the contact. The fields that you can see depend on the contact views that your administrator has made available to you. To change the contact view, use the View list. Learn more about contact views in Profiler.

If messages to this contact have bounced back or the contact is globally unsubscribed, the following icon is displayed next to the email address. These contacts can no longer be reached by email.
About contact engagement fields

**Note: Important:** This feature is only available if the Eloqua Advanced Intelligence Cloud Service is enabled for your account. Contact your account representative to learn more.

If your organization has the Eloqua Advanced Intelligence Cloud Service, use the fields to understand additional engagement information about the contact.
Email engagement

Using email send and open data, this rates the contact's email engagement on a scale of Low to High.

- **Low** - Based on email sends and opens, this contact has poor levels of engagement. Consider a highly personalized message or another way of reaching this contact.

- **Medium** - Based on email sends and opens, this contact's engagement is declining. Consider a personalized message to try to help with engagement.

- **High** - Based on email sends and opens, this contact has ideal engagement.

- **Uncategorized** - Based on email sends and opens, there just isn't enough information to categorize the engagement for this contact.

If no score available, there is no email engagement level for this contact yet.
Account engagement

For contacts that are linked to an account in Oracle Eloqua, this score rates the overall account activity. The scoring takes into consideration email opens, clickthroughs and form submissions. The higher the score, the more engaged the account. To find other contacts at this account, use the Profiler search feature to search by Account name.

Learn more about searching for contacts in Profiler.
Adjusting the lead score model displayed in Profiler

A lead score is displayed for each contact in Profiler. This value is based on the lead scoring models configured in your Oracle Eloqua instance. Your administrator manages which models are available to you. Learn more about lead scoring.
How Oracle Eloqua evaluates leads

Oracle Eloqua uses two sets of criteria to evaluate a lead:

- **Profile criteria**: This is explicit data about the lead, such as title, industry, or company revenues. This type of demographic data helps identify who the prospect is and the prospect's fit. Based on the profile criteria, the lead is given a profile score of A, B, C, or D.

- **Engagement criteria**: This is implicit data, such as visits to your website and responsiveness to promotions. This type of data helps determine a lead's online behavior and can indicate how interested the lead is. Based on the engagement criteria, the lead is given an engagement score of 1, 2, 3, or 4.

Once Oracle Eloqua evaluates a lead against the profile and engagement criteria, it combines the profile score and the engagement score and assigns the lead a lead score. A1 is the most qualified lead and a D4 is the least qualified.

**To change the lead scoring model displayed in Profiler:**

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

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

The Profiler alerts allow you to set up alerts that will inform you each time a contact, or anyone from the same domain, visits your website. As a Profiler user, you can set up alerts when you view a contact. The alerts provide near real-time notifications whenever a contact has visited your website.

Note: Profiler alerts must be enabled by your administrator. Learn more about configuring the app.

To set up alerts in Profiler:

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

2. Click the +Alert button below the contact's name. The Setup Alerts dialog opens.

3. Select or clear the check boxes to specify in which cases you want to be notified.
4. Click **Save**. The dialog closes and your web alert preferences are saved for this contact. You will be sent a notification email informing you of the contact's activities, according to the settings you configured. When you receive a notification, click **This Contact's Activity** in the notification email to open Profiler and view more details about the contact.

**To find and remove alerts:**

1. From the Sales Tools menu, go to **Settings** > **Profiler** > **Email Alerts**.

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

3. Click the **Alert** button below the contact's name. The **Setup Alerts** dialog opens. The button shows + to create a new one for the contact, or checkmark when you have one setup for the contact.

4. Click **View all Alerts**. You will be redirected to the page where you can see **Settings** > **Profiler** > **Email Alerts**.
Viewing email alerts

Using Engage and Profiler, you can view a list of the email alerts you are subscribed to.

Note: Email alerts are displayed if you have a Profiler license.

To view email alerts:
1. Click Settings.
2. Select the **Email Alerts** tab.
Your existing email alerts are displayed. You can remove any email alerts you no longer want to receive by clicking X.
Profiler integration

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

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

Embedding Profiler as a subtab in Oracle CX Sales

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

To enrich the user experience when working in Oracle CX Sales, you can embed a Profiler subtab into standard objects, such as Contacts and Sales Leads. This way, you can view the contact details for a potential client, their activities, their lead score value, and so on without needing to leave that Contact or Sales Lead object.
Prerequisites:

- Determine the login method that users will use to access Oracle Eloqua. There are three methods: Auto-login, SAML, or direct. The method you use depends on the security model implemented at your organization. Auto-login and SAML are options that support Single Sign-On (SSO). Direct login is for logging in directly through Eloqua. When embedding pages in your CRM, be sure to use the Eloqua login URL determined by the login method.

- In Oracle Eloqua, build an allowlist of the domains that will be hosting embedded Profiler pages. Learn more in the Configuring Profiler topic.

- If you are using an SSO login method, ensure that SSO is setup in Oracle Eloqua. Learn more about SSO configuration.

There are five steps to creating a Profiler subtab in CX Sales:

1. Creating a sandbox
2. Creating mashup content
3. Adding the mashup content to a standard object in CX Sales

4. Configure groovy expression

5. Publishing your sandbox

Step 1: Creating a sandbox

To create a sandbox:

1. Log in to Oracle CX Sales with your Administrator credentials.

2. Click **Navigator** at the top of the page, and under **Configuration** click **Sandboxes**.

3. Click **Create Sandbox**.

4. Ensure **Application Composer** is checked as **Active**, give your sandbox a name, and ensure that **Publishable** is set to **Yes**.

5. Click **Create and Enter**.

You'll be redirected to the Available Sandboxes page.
Step 2: Creating mashup content

To create mashup content:

1. At the top of the page, click **Tools > Application Composer**.

2. In the **Overview** section, click **Mashup Content > Register Web Application**. Alternatively, you can click **Mashup Content** in the left-side panel under **Common Setup**.
3. Configure the following options:
   - Give your web application a name. For example, Eloqua Profiler.

   - For Type:
     - If using a Direct URL, select Parameter-based.
     - If using an Auto-login or SAML URL, select Groovy expression.

   - If using the Direct URL, for **URL definition** enter the following URL:
     
     https://login.eloqua.com/apps/embed/salesTools/profiler

   - If using the Direct URL, in the **URL Parameters** section, click Add, then add the emailAddress parameter.

4. Click **Save and Close**.

**Step 3: Adding the mashup content to a standard object**

**To add the mashup content to a Contact or Sales Lead object:**

1. Still in the Application Composer, navigate to the left-side panel under **Objects**, expand **Standard Objects**, then expand the object you would like to add your subtab to.
In this topic, we'll expand the **Sales Lead** object.

2. Click **Pages**.

3. In the *Application Pages* tab, scroll down to the **Details Page Layouts** section, and click **Default Custom Layout**.
**Note:** The *Default Custom Layout* layout may not be present. If this is the case, select and duplicate an existing layout, for example you can duplicate the *Standard layout*. You can then edit the duplicate layout.

4. Scroll down and click **Add**.

5. Select **Mashup Content**, then click **Next**.

6. Select your Mashup Content from the *Web Applications* list, then click **Insert**.
Configure the following options:

- Give your subtab a name. In this case, you would give it a name related to Profiler. For example, you could name the subtab Eloqua Profiler.
- (Optional) Click **Change Icon** to change your subtab’s **Display Icon**.
- If you’re using the Direct URL, select values for your URL parameters. For Sales Leads, the **Parameter** is `emailAddress`, and the **Value** is `Contact Email`. For Contacts, the **Parameter** is also `emailAddress`, and the **Value** is `Primary Email`.

8. (Optional) Click **Next**. The Next option only appears if there are other details page layouts available to add the subtab to.

9. Click **Save and Close**.

10. If using Auto-login or SAML URLs, go directly to **Step 4: Configure groovy expression**.

11. **Done**.

**Step 4: Configure groovy expression**

*Note: Step 4 only applies if you selected Auto-login or SAML in Step 2.*

1. Still in **Sales Lead: Pages > Details Page Layouts > Default Custom Layout**, scroll down and click on your new mashup content’s icon.

*Tip: Your icon should be right above the Add icon.*
2. Click the **Edit** icon beside your mashup content's name.

3. In the *Edit Script* text box, insert the following script:

```
if (PrimaryContactEmailAddress != null) {
    return "https://login.eloqua.com/autoLogin?LoginPrefix={prefix}&Url=/apps/embed/salesTools/profiler?emailAddress=" + PrimaryContactEmailAddress;
}
else {

```

**Tip**: Replace `{prefix}` in the Auto-login URL and SAML URL with the Login Prefix in Eloqua. To find out your Login Prefix, navigate to **Settings > Display Preferences > Company Defaults**.
}

SAML

if (PrimaryContactEmailAddress != null) {
    return "https://login.eloqua.com/auth/saml2/autologin?CheckFrame=false&LoginPrefix={prefix}&ReturnUrl=/apps/embed/salesTools/profiler?emailAddress=" + PrimaryContactEmailAddress;
}
else {
}

Tip: If you're adding Profiler to the Contacts object, replace PrimaryContactEmailAddress in the above code samples with PrimaryEmailAddress. Since in this topic we're adding Profiler to the Sales Leads object, we'll keep PrimaryContactEmailAddress in our code.

4. Click Save and Close.
Step 5: Publishing your sandbox

1. Click **Sandboxes**, then click on your sandbox's name.

![Sandbox Navigation](image_url)

2. Click **Publish**.

After following these steps for Profiler, you can now view the subtab when you navigate to the standard object's page. For example, since in this topic we created a subtab for the Sales Lead object, we'll navigate to **Navigator ➔ Leads** under **Sales**. Once you open a lead, you see the Profiler subtab.

![Lead Subtab](image_url)
Troubleshooting

- For Firefox users, if you’re using Autologin or SAML access methods, and you cannot progress past the Eloqua authenticate now login screen, you may have to disable Firefox enhance tracking protection. To do this, in Firefox, navigate to Options in the Firefox browser > Privacy & Security > Enhanced Tracking Protection > select Custom > uncheck the box for Cookies.

- If you see a content security policy directive message in the iframe, check that your Profiler allowlist includes the required URLs for embedding in CX Sales. Make sure to also confirm that the URL you are using is correct.

Embedding Profiler into Oracle B2C Service

With Profiler, you're able to view the contact details for a potential client, their activities, their lead score value, and so on. By embedding Profiler into your Oracle B2C Service workspace, you can get activity and lead score context for a customer or prospect—before, while, or after you speak with them. In this way, you can use the information from Profiler to keep yourself prepared for customer communication.

Prerequisites:
• In Oracle Eloqua, build an allowlist of the domains that will be hosting embedded Profiler pages. Learn more in the Configuring Profiler topic.

**To embed Profiler into Oracle B2C Service:**

1. Log in to your B2C Service service console with your Administrator credentials.

2. Click Navigation > Configuration.

3. Click Application Appearance then double-click Workspaces / Workflows.

4. Create a new workspace or open an existing one.

   **Tip:** Ensure that the workspace you create or select has a relationship with contacts, for example a contact workspace or incident workspace.

5. (Optional) Right-click on a tab, and click Add Tab After or Add Tab Before.
6. (Optional) Double-click on the new tab, and click **Text** in the **Design** tab.

7. (Optional) Rename your tab to Profiler.

8. Open the **Insert Control** tab at the top of the page, then click **Browser** and drag it to the design space for your tab.

9. Click the browser control to select it.

10. Open the **Design** tab at the top of the page.
11. In the *Options* section of the *Design* tab, click **URL** and enter one of the following URLs:

   - **Direct:**
     
     https://login.eloqua.com/apps/embed/salesTools/profiler?emailAddress=$contact.email.addr

   - **Auto-login:**
     
     https://login.eloqua.com/autoLogin?LoginPrefix=
     
     {prefix}&Url=/apps/embed/salesTools/profiler?emailAddress=$contact.email.addr

   - **SAML:**
     
     
     {prefix}&ReturnUrl=/apps/embed/salesTools/profiler?emailAddress=$contact.email.addr

   - **Tip:** Replace `{prefix}` in the Auto-login URL and SAML URL with the Login Prefix in Eloqua. To find out your Login Prefix, navigate to **Settings > Display Preferences > Company Defaults.**

12. Check the **Send URL as Post Data** and **Open Pop-ups in New Browser Control** check boxes.

13. Click **Save.**

   Profiler is now embedded within the context of your workspace in an iframe.

### Adding a Profiler link to Oracle CX Sales

- **Important:** *Oracle Sales* was formerly known as *Oracle Sales Cloud.* All instances of Oracle Sales Cloud have been changed to Oracle CX Sales across the app user interface.
There are two main steps that you must follow to add a Profiler link to your Oracle Sales (formerly Oracle Sales Cloud) account:

1. Create a Profiler link
2. Add the link to a layout

Step 1: Creating a Profiler link.

To create a Profiler link:

1. Log in with your Administrator credentials.
2. Click the Navigator icon, then under Configuration click Application Composer.
3. In the left-side pane, select Marketing from the Application drop-down list.
4. In the left-side pane under Objects, expand Standard Objects > Sales Lead > Sales Lead Contacts, then select Actions and Links.
5. Click Create to create a link, then enter the following information:
   - **Display Label**: Profiler
   - **Name**: Eloqua_Profiler
   - **Type**: Select Link
   - **URL Definition**: Enter one of the following URLs:
     - **Direct**:
       ```
       def URL="https://login.eloqua.com/apps/embed/salesTools/profiler?emailAddress=" + nvl(PrimaryEmailAddress,""")
       ```
     - **Auto-login**:
       ```
       def URL="https://login.eloqua.com/autoLogin?LoginPrefix=<LoginPrefix>&Url=/apps/embed/salesTools/profiler?emailAddress=" + nvl(PrimaryEmailAddress,""")
       ```
SAML:

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

Replace `{Login_Prefix}` with your four-character Eloqua login prefix code, such as ELQA. You can alternatively use `SiteId={site_ID}` with your Eloqua site ID, which is a numeric code. To find your login prefix or your site ID, navigate to Settings > Display Preferences > Company Defaults. You can also choose to ignore this parameter and it will attempt to log you in using the first Eloqua saved credential it finds.

6. Click Validate to validate the script.

7. Click Save.

Step 2: Adding the Profiler link to layouts

To add the Profiler link to a layout:

1. In Application Composer left-side menu, navigate to Standard Objects > Sales Lead, then click Pages.

2. Under Simplified Pages, locate the Details Page Layouts section, then click on the name of the layout to which you want to add the link.
3. In the **Subtabs Region** section, open the **Contacts** tab.

4. Click **Edit** next to **Contacts**.

5. Under the **Available Fields** column, select the Profiler link that you created then click to move the link to the **Selected Fields** column.

6. Adjust the link’s location in the **Selected Fields** list using the up and down arrows next to the list, then click **Save and Close**.

When you open to a customer you will see the Profiler link.

---

**Embedding Profiler in CRM onDemand**

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

1. Create a web applet

2. Add the web applet to a page layout
**Note:** You will need to create two applets— one for leads and one for contacts. The instructions below are for Contacts but you can follow the same procedure for Leads.

Step 1: Creating a web applet for contact and leads

**Prerequisites:**

- In Oracle Eloqua, build an allowlist of the domains that will be hosting embedded Profiler pages. Learn more in the Configuring Profiler topic.

**To create a web applet:**

1. Login to CRM onDemand with your Administrator credentials.

2. Navigate to User > Configure > Admin.

3. Click Application Customization.
4. Under Record Type Setup, click **Contact**.

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

- **Name**: Enter a name. (Example: Contact Profiler)
- **Location**: Select Detail Page
- **Type**: Select URL
- **URL**: Enter one off the following URLs
  - **Direct**: https://login.eloqua.com/apps/embed/salesTools/profiler?emailAddress%3D%%%Email_Address%%%
  - **Auto-login**: https://login.eloqua.com/autoLogin?LoginPrefix={prefix}&Url=/apps/embed/salesTools/profiler?emailAddress%3D%%%Email_Address%%%
  - **SAML**: https://login.eloqua.com/auth/saml2/autologin?CheckFrame=false&LoginPrefix={prefix}&ReturnUrl=/apps/embed/salesTools/profiler?emailAddress%3D%%%Email_Address%%%
- **Height**: Enter 800

6. Click **Save**.
Step 2: Adding webs applet to page layouts

To add an applet to a page layout

1. Navigate to User > Configure > Admin.
2. Click Application Customization.
4. Choose the page layout that you want to modify

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

5. In the Not Available Information column, locate the web applet that you created, then highlight it (single left-click) and click the > arrow to move it to the Available Information column.
6. Select the applet in the Available Information column, then click the > arrow to move it to the Displayed Information column.
7. Click Finish.

⚠️ Important: Repeat the above steps for Leads
Embedding Profiler in Microsoft Dynamics 2016

Profiler can be embedded in Microsoft Dynamics.

Prerequisites:

- In Oracle Eloqua, build an allowlist of the domains that will be hosting embedded Profiler pages. Learn more in the Configuring Profiler topic.

- If you are using an SSO login method, ensure that SSO is setup in Oracle Eloqua. Learn more about SSO configuration.

To install Profiler in Dynamics:

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

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

3. Click New, then select the form to which you want to add Profiler.

4. Click the Insert tab in the top menu.

5. Add a one-column tab.

6. Add an iframe to this tab.
• Name: IFRAME_Profiler
• URL: http://about:blank
• Label: Eloqua Profiler
• Ensure that Restrict cross-frame scripting is unchecked

7. On the Formatting tab, modify the height by setting the number of rows, such as 20.
8. On the Dependencies tab, add email as a dependent field.
9. Click OK to close the IFRAME window.
10. On the Home tab, click Form Properties in the Form section.
11. Under Form Libraries, click Add, then click New.
   • Name: new_EPPOnLoad
   • Type: Script (JScript)
12. Click the text editor button that appears.
13. In the text editor, copy and paste the following string: function loadProfiler() {
14. Copy and paste one of the following code snippets (depending on your login choice).
   • Direct login
     ```javascript
     var newUrl = "https://login.eloqua.com/apps/embed/salesTools/profiler?emailAddress="
      + document.getElementById("emailaddress1").title;Xrm.Page.ui.controls.get("IFRAME_Profiler").setSrc(newUrl);
     ```
   • Autologin
     ```javascript
      document.getElementById("emailaddress1").title;Xrm.Page.ui.controls.get("IFRAME_Profiler").setSrc(newUrl);
     ```
15. Be sure to close everything with a final }. If you chose auto-login, your code should look something like this:

```javascript
function loadProfiler() {
}
```

Replace `{Login_Prefix}` with your four-character Eloqua login prefix code, such as ELQA. You can alternatively use `SiteId={site_ID}` with your Eloqua site ID, which is a numeric code. To find your login prefix or your site ID, navigate to Settings > Display Preferences > Company Defaults. You can also choose to ignore this parameter and it will attempt to log you in using the first Eloqua saved credential it finds.

16. Click OK to close the text editor.

17. Click Save, then click Publish and close the window.

18. Close the Look Up Record window.


20. Select the new function you created from the list and then name it.
21. Click OK.

22. Click OK in the Form Properties window.

23. Click Save, then click Publish on your form.

24. Repeat for the Leads entity if needed.

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

**Embedding Profiler in Microsoft Dynamics 365**

You can add Profiler to your Microsoft Dynamics 365 instance.

**Prerequisites**

- An installed Profiler instance, its associated credentials, including company name and its login prefix.
- If you are using version 9 and above of Microsoft Dynamics 365, see **Version 9 and above**.
- A Microsoft Dynamics 365 instance and the permissions needed to customize it.
- In Oracle Eloqua, build an allowlist of the domains that will be hosting embedded Profiler pages. Learn more in the Configuring Profiler topic.
- If you are using an SSO login method, ensure that SSO is setup in Oracle Eloqua. Learn more about SSO configuration.

**Version 9 and above**

If you are using version 9 and above of Microsoft Dynamics 365, you will need to perform some steps differently:

- If Profiler is already embedded in your Microsoft Dynamics 365, you'll need to make the below changes, save them, then publish them.
• For step 13 in the Handler Properties window, make sure Pass execution context as first parameter is enabled.

• You'll need to use one of these code snippets for step 18:

  **Direct login**

  ```javascript
  loadProfiler(executionContext) {
    var newUrl = "https://login.eloqua.com/apps/embed/salesTools/profiler?emailAddress=" + executionContext.getFormContext().getAttribute("emailaddress1").getValue();Xrm.Page.ui.controls.get("IFRAME_Profiler").setSrc(newUrl);
  }
  ```

  **Auto-login**

  ```javascript
  loadProfiler(executionContext) {
  }
  ```

  **SAML SSO**

  ```javascript
  loadProfiler(executionContext) {
  ```
To embed Profiler in Microsoft Dynamics 365:

1. Log in to Microsoft Dynamics 365 and navigate to Settings.

2. In the Customization section, click Customizations.

3. On the Customization page, click Customize the System.

4. On the PowerApps page, under Components, select Entities > Contact > Forms.
5. Click **New**, then select the form you want to add Profiler to, such as *Main Form*.

![PowerApps Interface](image1.png)

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

7. Add a *One Column Tab* select the new tab and click **IFRAME** to add an iframe to it.

![PowerApps Interface](image2.png)

The **Add an IFRAME** window is displayed.
8. Enter the following iframe values.

a. Name: IFRAME_Profiler
b. URL: http://about:blank
c. Label: Eloqua Profiler
d. In the Security section, clear the **Restrict cross-frame scripting** option.
9. (Recommended) In the Row Layout section of the Formatting tab, increase the height by setting the number of rows to 20 so that Profiler will have enough room to display its information.

10. On the Dependencies tab, add email as a dependent field.

11. Click OK to close the Add an IFRAME window.


The Form Properties window is displayed.

13. Click Add. The Handler Properties window is displayed.

Clean Important: If you are using Microsoft Dynamics 365 version 9 and above, see Version 9 and above for additional steps in the Handler Properties window.
14. From the Library list, select **new_EPPOnLoad**.

15. In the Function box, enter `loadProfiler` and click OK.

16. Double-click your new iframe. The IFRAME Properties window is displayed.

17. On the Events tab, expand **Form Libraries** and double-click **new_EPPOnLoad**. The Edit Content window is displayed.

18. Depending on your login type, copy and paste one of the following code snippets into the code editor:

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

   **Important:** If you are using Microsoft Dynamics 365 version 9 and above, see Version 9 and above for the code snippets. Ignore the below code snippets for step 18.

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

- **Autologin**

```javascript
function loadProfiler() {
+ document.getElementById("emailaddress1").title;Xrm.Page.ui.controls.get("IFRAME_Profiler").setSrc(newUrl);
}
```

- **SAML SSO**

```javascript
function loadProfiler() {
+ document.getElementById("emailaddress1").title;Xrm.Page.ui.controls.get("IFRAME_Profiler").setSrc(newUrl);
}
```
Direct login example:

Replace \{Login\_Prefix\} with your four-character Eloqua login prefix code, such as ELQA. You can alternatively use \SiteId=\{site\_ID\} with your Eloqua site ID, which is a numeric code. To find your login prefix or your site ID, navigate to Settings > Display Preferences > Company Defaults. You can also choose to ignore this parameter and it will attempt to log you in using the first Eloqua saved credential it finds.

Replace the \{emailaddress\} with the value in your Microsoft Dynamics 365 instance. For example, it can be emailaddress1, emailaddress1\_d, or emailaddress1\_i. To determine what is used in your Microsoft Dynamics 365 data, inspect an existing contact's email address with your browser's developer tools. For example, to find your value using Google Chrome:

a. Go to Sales > Contacts and click an existing contact.

b. Pressing Ctrl+Shift+I to open developer tools.

d. The value associated with the contact's email address field that is followed by `title="{emailAddress}"` indicates the value you need to include. In the following example, the needed value is emailaddress1_d.

---

**Example:** If you chose autologin, your `{LoginPrefix}` is ELQA, and your `{emailaddress1}` value is `emailaddress1_d`, your code should look something like this:

```javascript
function loadProfiler(){
    var newUrl = 
    /embed/salesTools/profiler?emailAddress=" + 
    document.getElementById("emailaddress1_d").title;Xrm.Page.ui.controls.get("IFRAME_Profiler").setSrc 
    (newUrl);
}
```
19. Click **OK** to close the text editor.

20. On the **Home** tab, click **Save**, click **Publish**, and then close the **PowerApps** window.

21. Go to **Contacts** and open a contact that is known to exist in both Oracle Eloqua Profiler and Microsoft Dynamics 365 to test that your new Eloqua Profiler iframe is working. If you are prompted to authenticate, enter your Eloqua credentials. If there is a match based on the email address, the Profiler iframe should display information for the contact.
Important: If the IFRAME window appears blank, navigate to Settings > Administration > System Settings > General, and change the setting for Use legacy form rendering to Yes. Microsoft Dynamics will then correctly render the Profiler iframe.

Embedding Profiler in Salesforce Classic

Note: If you are using Salesforce Lighting, see Embedding Profiler in Salesforce Lightning.

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

**Prerequisites:**

- In Oracle Eloqua, build an allowlist of the domains that will be hosting embedded Profiler pages. Learn more in the Configuring Profiler topic.

- Determine the login method that users will use to access Oracle Eloqua. There are three methods: Auto-login, SAML, or direct. The method you use depends on the security model implemented at your organization. Auto-login and SAML are options that support Single
Sign-On (SSO). Salesforce IDP is an option for Salesforce SSO logins. Direct login is for logging in directly through Eloqua. When embedding pages in your CRM, be sure to use the Eloqua login URL determined by the login method.

- If you are using an SSO login method, ensure that SSO is setup in Oracle Eloqua. In most cases, you will then use the SAML login URL for embedding Eloqua Sales Tools. The Salesforce IDP login method is only supported if your organization continues to use the Salesforce native integration and have not migrated to the Salesforce Integration app. Learn more about SSO configuration.

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

1. Create a Visualforce page for contacts and leads
2. Adjust security for Visualforce pages
3. Add Visualforce pages to contact and lead layouts

Tip: If you encounter any issues, see Troubleshooting.

Step 1: Creating a Visualforce page for contacts and leads

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

To create a Visualforce page:
1. Log into your Salesforce account using your administrator credentials, then navigate to Setup in the upper right-hand corner of the screen.

2. Navigate to Develop (under Build section) > Visualforce Pages > New.

3. Provide a Label and a Name for the Visualforce page.
**Note:** These two fields will only be used when managing layouts and sections and will not be visible by users simply reviewing a lead record. The name can be whatever you want but it must contain only alpha-numeric characters and must not have any spaces.

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

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

   </apex:page>`

   </apex:page>`

   </apex:page>`

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

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

6. Click Save.

Step 2: Adjusting security for Visualforce pages

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

To adjust the security for a Visualforce page:
1. Navigate to Develop (under Build section) > Visualforce Pages.

2. Click Security next to the pages you created.

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

4. Click Save.

Step 3: Adding Visualforce pages to contact and lead layouts

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

To add a Visualforce page to layouts:
1. Navigate to Setup in the upper right-hand corner of the screen.


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

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

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

7. Go back to the top area (the area from which you dragged and dropped the new section) and scroll down if necessary to select **Visualforce Pages** (in the area just to the left of the buttons area).

8. Drag the button for the new Visualforce page you made into the new section you just created.

   You have now included Eloqua Profiler in your layout. Now let’s adjust the settings for this new section.

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

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

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

**Important:** Repeat the above steps for the layout of your Contact object.

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

- If you see a content security policy directive message in the iframe, check that your Profiler allowlist includes the required URLs for embedding in Salesforce. Make sure to also confirm that the URL you are using is correct.

- If the iframe is not connecting, copy the URL you were trying to use in the Visualforce Markup tab (this will be the text between src=" and the next "), and enter it into a browser to test that it works on its own. Depending on the URL type, you might need to already be logged into Profiler.

- If you’re experiencing trouble with your SSO, see Testing single sign-on with Salesforce for other troubleshooting tips.

- If the Profiler iframe is trying to open a contact whose email address includes a + symbol, you’ll encounter a Whitelabel Error Page error. To fix this, add $URLENCODE to the URL in the Visualforce Markup tab: ...profiler?emailAddress={$URLENCODE(lead.email)}. Make sure to remove the ! from $lead.email and place one before URLENCODE, and to add parentheses around $lead.email.
• For Firefox users, if you’re using Autologin or SAML access methods, and you cannot progress past the Eloqua authenticate now login screen, you may have to disable Firefox enhance tracking protection. To do this, in Firefox, navigate to Options in the Firefox browser > Privacy & Security > Enhanced Tracking Protection > select Custom > uncheck the box for Cookies.

• If none of the above troubleshooting tips have solved your issue, please log in to My Oracle Support (https://support.oracle.com) and create a service request.

Embedding Profiler in Salesforce Lightning

⚠️ Note: If you are using Salesforce Classic, see Embedding Profiler in Salesforce Classic.

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

**Prerequisites:**

- In Oracle Eloqua, build an allowlist of the domains that will be hosting embedded Profiler pages. Learn more in the Configuring Profiler topic.

- Determine the login method that users will use to access Oracle Eloqua. There are three methods: Auto-login, SAML, or direct. The method you use depends on the security model implemented at your organization. Auto-login and SAML are options that support Single Sign-On (SSO). Salesforce IDP is an option for Salesforce SSO logins. Direct login is for logging in directly through Eloqua. When embedding pages in your CRM, be sure to use the Eloqua login URL determined by the login method.

- If you are using an SSO login method, ensure that SSO is setup in Oracle Eloqua. In most cases, you will then use the SAML login URL for embedding Eloqua Sales Tools. The Salesforce IDP login method is only supported if your organization continues to use the Salesforce native integration and have not migrated to the Salesforce Integration app. Learn more about SSO configuration.

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

1. Create a Visualforce page for contacts and leads
2. Adjust security for Visualforce pages
3. Add Visualforce pages to contact and lead layouts
Step 1: Creating a Visualforce page for contacts and leads

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

To create a Visualforce page:

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

2. Locate the Quick Find search box, and search for Visualforce Pages

   Alternatively, you can click **Custom Code > Visualforce Pages**.

3. Click **New**.

4. Provide a **Label** and a **Name** for the Visualforce page.

Note: These two fields will only be used when managing layouts and sections and will not be visible by users simply reviewing a lead record. The name can be whatever
5. In the Visualforce Markup tab, copy and paste the code that corresponds with your choice of login options:

- **Direct**: `<apex:page standardController="Lead"><apex:iframe scrolling="true"
</apex:page>

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

- **SAML**: `<apex:page standardController="Lead"><apex:iframe scrolling="true"
{prefix}&ReturnUrl=/apps/embed/salesTools/profiler?emailAddress={!lead.email}"/>
</apex:page>

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

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

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

   ![Page Edit](image)

7. Click Save.

Step 2: Adjusting security for Visualforce pages

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

To adjust the security for a Visualforce page:

1. Locate the Quick Find search box, and search for Visualforce Pages

   Alternatively, you can click Custom Code > Visualforce Pages.
2. Click **Security** next to the pages you created.

Visualforce Pages

Visualforce Pages provide a robust and easy to use mechanism to create new and exciting user experiences for your application or to enhance existing applications.

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

4. Click **Save**.

Step 3: Adding Visualforce pages to contact and lead layouts

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

**To add a Visualforce page to layouts:**
1. Locate the Quick Find search box, and search for Object Manager.

   Alternatively, you can click **Objects and Fields > Object Manager**.

2. Click **Lead > Page Layouts**.

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

4. Drag the button near the top of your screen to create a new section in your layout to contain Eloqua Profiler.

5. Place the new section into the area of the layout in which you would like Eloqua Profiler displayed.

6. Name the section. Ensure that the two check boxes are selected, and select a 1-Column Layout.

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

7. Go back to the **Contact Layout** section at the top of the page, and click on **Visualforce Pages** in the list of options.

8. Drag the button for the new Visualforce page you made into the new section you just created.

   You have now included Eloqua Profiler in your layout. Now let’s adjust the settings for this new section.

9. Hover over the top right corner of the Visualforce page (inside the Section) until a wrench icon appears. Make sure it is the one for the Visualforce page and not the entire section.
10. Click on the wrench icon. In the Visualforce Page Properties dialog, ensure that the width is set to 100% and the height is set to 610.

11. Click OK.

12. Click Save to save this layout.

**Important**: Repeat the above steps for the layout of your Contact object.

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

**Troubleshooting**

- If you see a content security policy directive message in the iframe, check that your Profiler allowlist includes the required URLs for embedding in Salesforce. Make sure to also confirm that the URL you are using is correct.

```
embed-apps.p01.eloqua.com refused to connect.
```

- If the iframe is not connecting, copy the URL you were trying to use in the Visualforce Markup tab (this will be the text between src=" and the next "), and enter it into a browser to test that it works on its own. Depending on the URL type, you might need to already be logged into Profiler.
• If you're experiencing trouble with your SSO, see Testing single sign-on with Salesforce for other troubleshooting tips.

• If the Profiler iframe is trying to open a contact whose email address includes a + symbol, you'll encounter a Whitelabel Error Page error. To fix this, add `URLENCODE` to the URL in the `Visualforce Markup` tab: `...profiler?emailAddress={!URLENCODE(lead.email)}`. Make sure to remove the `!` from `!lead.email` and place one before `URLENCODE`, and to add parentheses around `lead.email`.

• For Firefox users, if you're using Autologin or SAML access methods, and you cannot progress past the Eloqua authenticate now login screen, you may have to disable Firefox enhance tracking protection. To do this, in Firefox, navigate to Options in the Firefox browser > Privacy & Security > Enhanced Tracking Protection > select Custom > uncheck the box for Cookies.

• If none of the above troubleshooting tips have solved your issue, please log in to My Oracle Support (https://support.oracle.com) and create a service request.

Embedding Profiler in Okta with SSO

Learn how to access Profiler if your are using Okta SSO.

Overview

The high level configuration steps are as follows:
1. Ensure you have setup up single sign-on in Oracle Eloqua. Learn more.

2. Retrieve the identity provider ID

3. If you will be embedding Profiler within a CRM or other apps, create the allowlist of domains that will host Profiler pages. Learn more.

4. Understand how to access Profiler:
   - Accessing Profiler with Okta SSO
   - Accessing Profiler as an Okta app

Retrieving the Okta identity provider ID

You will need the Okta identity provider ID so that you can properly format the URLs used to access Sales Tools.

Before you begin:

- Ensure you have setup up single sign-on in Oracle Eloqua. Learn more.

To retrieve the identity provider ID:

1. In Oracle Eloqua, go to Settings > Single Sign-On in the Users and Security area.

2. Open the Okta identity provider that you created.

3. From the Service Provider Entity field, copy the end of the URL provided.
Accessing Profiler with Okta SSO

Profiler is an app you can access via a URL from any location. It could be launched standalone in a browser but is most commonly are embedded inside a CRM system.

To access Profiler with Okta SSO:

1. Enter the following URL:
   - To launch Profiler standalone in a browser:
   - To embed Profiler in a CRM or other app:

Where:

- **LoginPrefix** is the unique four-character code for your Eloqua instance. You can alternatively use your site ID for this value. You can obtain your company's login prefix or site ID in Eloqua by navigating to Settings > Display Preferences > Company Defaults.

- **identityProviderId** is the identity provider ID from your SSO setup.

**Note:** If you do not provide the LoginPrefix parameter, Eloqua will attempt to log you in using the first Eloqua saved credential it finds.
Once you have this properly formatted URL, as long as a user has an Okta session active in their browser, they can access Profiler.

Accessing Profiler as an Okta app

To allow users direct access to Profiler from apps in Okta:

1. In Okta, create a new Okta app for Profiler.

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

   ReturnURL=%2Fapps%2FsalesTools%2Fprofiler

Tip: You can append additional parameters to this URL. For example, to open Profiler to a specific contact. Learn more.