Oracle Eloqua and Salesforce

Integration Guide

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Integrating Oracle Eloqua with Salesforce

Important: The Salesforce native integration was deprecated February 1, 2021. We recommend using the the Salesforce Integration app in its place. Learn more in our product notice.

Important: Organizations typically work with Oracle's implementation services to ensure a successful CRM integration.

This documentation provides a starting point to show how you can integrate Oracle Eloqua and Salesforce. However, your specific integration will require customizations to support your unique business needs. Our steps are based on a non-customized Oracle Eloqua instance and a non-customized Salesforce instance.

Oracle Eloqua and Salesforce integration can help you boost marketing and sales alignment and drive ROI. Connect the segmentation, campaign management, and lead generation processes in Oracle Eloqua with the lead, contact, and account management processes in Salesforce. CRM integration ensures your marketing and sales teams have accurate and detailed information about a prospect and provides a more complete picture of the buyer.

CRM integration synchronizes data between Salesforce and Oracle Eloqua:

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- Synchronize account, contact, and lead data so that you can use the most accurate data in your marketing campaigns and sales engagements.
- Synchronize marketing campaign activity so marketing can provide detailed information to sales about a prospect including web activity, email opens, form submits, and more.

In addition, you can implement closed-loop reporting which enables you to attribute opportunity revenue from Salesforce to marketing campaigns. See Closed-loop reporting with Salesforce for more information on this configuration.

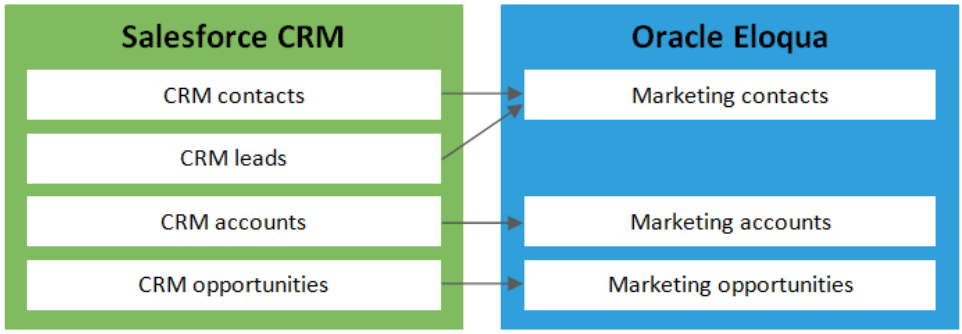
> **Tip**: You can also use the Salesforce Integration app.

About Salesforce integration with Oracle Eloqua

The CRM integration documented here uses the following process flows:

- **From Salesforce to Oracle Eloqua**

  Synchronizes accounts, contacts, leads and opportunities in Salesforce with Oracle Eloqua. For more information, see Data imports from Salesforce to Oracle Eloqua.



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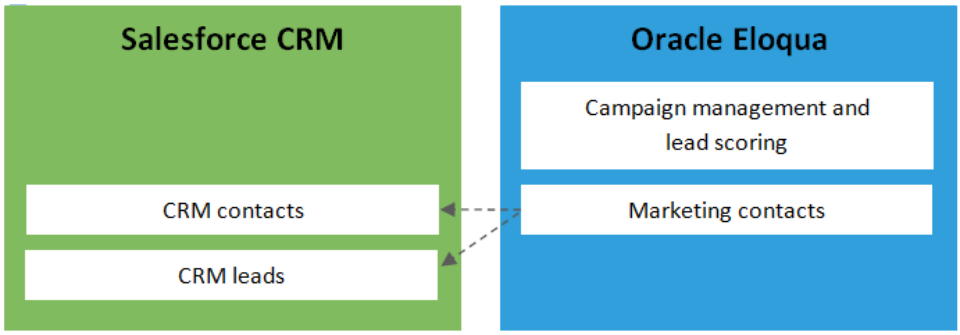
- **From Oracle Eloqua to Salesforce**

  Uses contact data in Oracle Eloqua to update contacts and generate sales leads in Salesforce. A sales lead is created for each new prospect captured in Eloqua and for responses from existing contacts to a campaign or other marketing event. For more information, see Data exports from Oracle Eloqua to Salesforce.



Assumptions and constraints

Before following the integration outlined in this documentation, note the following assumptions and constraints:

- Only Salesforce leads and contacts with email addresses are synchronized into Oracle Eloqua out of the box.
- Marketing activities can be logged only for known Salesforce leads and contacts at the time the activity is recorded in Oracle Eloqua.
- Oracle Eloqua does not automatically delete records. If a lead, contact, or account is deleted in CRM, the record is picked up in the *Delete* auto synch for that entity, and the corresponding Oracle Eloqua field containing that CRM ID field is to set to blank.
- Oracle Eloqua prioritizes Salesforce as the system of record, treating its data as the official, first-priority record.

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Considerations

Before starting the integration process, consider the following to ensure the integration successfully meets your organization's needs:

- Make sure your data is clean before you start. For example:
    - How do you feel about the quality and completeness of your data?
    - Do you have many records with duplicate email addresses?
    - Have you cleaned up your data by running deduplication processes?
- Ensure your Salesforce administrator is involved in the integration process. Integration with Oracle Eloqua should only begin after you have a clear understanding of:
    - What business processes feed your database?
    - What business processes does your data support?
    - Do you have any data storage constraints in your CRM?
    - Are there other integrations or external databases?
    - What specific objectives is this integration intended to achieve?
- Determine how you want data to flow back into Salesforce. What leads do you want to send?

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Data imports from Salesforce to Oracle Eloqua

Important: The Salesforce native integration was deprecated February 1, 2021. We recommend using the the Salesforce Integration app in its place. Learn more in our product notice.

Oracle Eloqua imports existing account, contact, and lead data from Salesforce. After the initial import, any changed data is imported using an incremental process.

Oracle Eloqua uses auto synchs and external calls to mange the imports. When to import the data and what data to import depends on how you setup your implementation.

Note: When an account, contact, lead, or opportunity is imported to Oracle Eloqua, the Oracle Eloqua record includes the ID of the original Salesforce record.

The following table provides key details about the synchronization of different data types:

Salesforce entity	Details
Contacts	Salesforce contacts are stored in the Eloqua contact

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Salesforce entity	Details
	database. CRM records are matched with Eloqua records using the email address. If a contact exists with the same email address, the contact record is updated with the latest CRM data. If there is no contact record with the same email address, a new contact record is created in Oracle Eloqua. See Duplicate record processing.
Leads	In Salesforce, a lead is a person identified as a potential customer. Oracle Eloqua stores leads as contacts in the Oracle Eloqua contact database. CRM records are matched with Oracle Eloqua records using the email address. If a lead exists with the same email address, the contact record is updated with the latest CRM data. If there is no contact record with the same email address, a new contact record is created in Oracle Eloqua.
Accounts	Salesforce accounts are added to the Oracle Eloqua account database. CRM records are matched with the Oracle Eloqua account database using the account ID. If there is an Oracle Eloqua account with the same ID, the account record is updated with the latest CRM data. If there is no account record in Oracle Eloqua with the same ID, a new account is created. In Oracle Eloqua contacts are linked to accounts using the account ID. If a contact is associated with more than one account in Salesforce, only the primary account is associated with the contact in Oracle Eloqua.

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Salesforce entity	Details
	Note: It is recommended that you only synch accounts from Salesforce to Oracle Eloqua.

Opportunities	• A Salesforce opportunity is not visible in Oracle Eloqua until a contact linked to the opportunity responds to an Oracle Eloqua campaign, such as by submitting a form.
	• A Salesforce opportunity is synchronized to Oracle Eloqua through an account that a contact is associated to. The contact to associate the opportunity with can be based on:
	  • The primary contact associated with the Salesforce opportunity
	  • All contacts associated to the Salesforce opportunity
	  • All contacts in Oracle Eloqua associated to the account that is associated to the Salesforce opportunity
	• Salesforce opportunities are matched in Oracle Eloqua using the **Opportunity ID** field on the opportunity object.
	• In Oracle Eloqua, you must define opportunity stages to match those used in Salesforce. Otherwise, the opportunity will fail to be updated in Oracle Eloqua.
	• In Oracle Eloqua you can search for opportunities from campaigns. To see opportunities linked to campaigns, the opportunity must be in Eloqua, the opportunity-contact link must be created via import, and the campaign response must be generated for the contact.

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Duplicate record processing

Note: It is recommended that you remove duplicate sales records before integrating with Oracle Eloqua. Duplicate data history is not maintained.

Oracle Eloqua uniquely identifies records based on email address. When Salesforce contact records with the same email address are imported into Oracle Eloqua at the same time, duplicates are merged into a single record, with the highest ASCII value retained on a field-by-field basis (Z is higher than A; 9 is higher than 1; letters are higher than numbers; lowercase is higher than uppercase).

The following table illustrates the duplicate record processing.

Email	First name	Last Name	Company	Address	Job Title
Salesforce contact records					
bob@example.com	Bob	Smith	Example Inc.	401 Island Parkway Redwood Shores, CA	Marketing Director
bob@example.com	Robert	Smith	Example Ltd.	104 Island Parkway Redwood Shores, CA	Director of Marketing
Oracle Eloqua contact record					
bob@example.com	Robert	Smith	Example Ltd.	401 Island Parkway Redwood Shores, CA	Marketing Director

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Data exports from Oracle Eloqua to Salesforce

Important: The Salesforce native integration was deprecated February 1, 2021. We recommend using the the Salesforce Integration app in its place. Learn more in our product notice.

To update Salesforce, the integration uses Program Builder and external calls. Oracle Eloqua data is sent to Salesforce whenever an event occurs in Oracle Eloqua. For example, when a contact submits an Oracle Eloqua form (the event), form processing rules add the contact the update program. Oracle Eloqua always updates contacts in Salesforce if they exist. Oracle Eloqua creates leads based on your implementation setup. The data sent over depends on how you setup your implementation.

Oracle Eloqua maintains the relationship between Salesforce records using the Salesforce record identifier (CRM ID). The CRM ID of each record imported from Salesforce is retained on the corresponding record created or updated in Oracle Eloqua.

This table provides some key details about the synchronization of the different data types:

Oracle Eloqua data	Details
Lead	A lead is created in Salesforce when new contacts are added to

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Oracle Eloqua data	Details
	the CRM Update program through events such as form submits, list uploads, and marketing campaigns. **Note**: Lead assignment is managed strictly in Salesforce and can be triggered upon lead creation from Oracle Eloqua.
Contact	Oracle Eloqua sends contact data to Salesforce when the contact record has a Salesforce Contact ID. Oracle Eloqua will not create new contacts in Salesforce. If the contact record does not have a Salesforce Contact ID, Oracle Eloqua creates a new lead in Salesforce.
Marketing activities	Specific Oracle Eloqua-generated activities, such as email opens and email clickthroughs, can be exported to a Salesforce Activity Object as a completed task for known Salesforce leads and contacts. You can integrate campaign and response data by implementing closed-loop reporting. See Closed-loop reporting with Salesforce for more information.
Account	Accounts in Salesforce are not updated when data is synchronized from Oracle Eloqua.

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Steps to integrate with Salesforce

Important: The Salesforce native integration was deprecated February 1, 2021. We recommend using the the Salesforce Integration app in its place. Learn more in our product notice.

The following table provides an overview of the steps you need to complete to integrate Salesforce and Oracle Eloqua:

Step	Description
Preliminary Salesforce setup	Complete the initial setup in Salesforce which involves creating a CRM integration user and adding Oracle Eloqua to the list of trusted servers. See Preliminary Salesforce setup for your integration.
Preliminary Oracle Eloqua setup	Complete the initial setup in Oracle Eloqua. This involves the following: • Confirming access to Salesforce using the CRM integration user • Running the CRM Integration Wizard to start the integration process • Disabling queues and auto synchs so that the systems do not synchronize while you complete the configuration

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Step	Description
	See Preliminary Oracle Eloqua setup for your integration.
Configure data synchronization from Salesforce to Oracle Eloqua	Configure the auto synchs to import Salesforce account, contact, and lead data to Oracle Eloqua. See Configuring data imports from Salesforce.
Configure data synchronization between Oracle Eloqua and Salesforce	Configure how to synch data from Oracle Eloqua to Salesforce. This configuration involves the following: • Configuring which data sources have priority to update Oracle Eloqua data • Setup any contact and account record fields in Oracle Eloqua that are needed for data synchronization • Specifying how to link accounts to contacts • Configuring external calls that will create and update in Salesforce • Creating custom web links for Salesforce users • Enabling the CRM Email Opt Out program which ensures email opt-out settings are synchronized • Configuring the program used to trigger updates to leads and contacts in Salesforce. • Enabling activity writing so that Oracle Eloqua-tracked activities, such as email clickthroughs, website visits, and form submissions, can be written to Salesforce as closed tasks See Configuring data exports from Oracle Eloqua to

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Step	Description
	Salesforce.
Initializing and monitoring the Salesforce integration	Re-initialize the systems that were disabled during the preliminary setup, then configure the notifications needed to monitor and maintain the integration. This involves the following: • Enabling the auto synchs • Enabling the internal and external queues • Configuring system notifications about errors See Initializing and monitoring the Salesforce integration.

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Preliminary Salesforce setup for your integration

Important: The Salesforce native integration was deprecated February 1, 2021. We recommend using the the Salesforce Integration app in its place. Learn more in our product notice.

Before you begin the Salesforce integration, complete these preliminary tasks in Salesforce:

- Setting up Salesforce user
- Adding Oracle Eloqua to the list of trusted servers

Note: To complete the second task, you must identify Oracle Eloqua by IP. If you do not have the Oracle Eloqua IP ranges, contact My Oracle Support (https://support.oracle.com).

Setting up Salesforce user

It is strongly recommended that you create a unique Salesforce user exclusively for the ongoing data exchange between Oracle Eloqua and Salesforce. This can help properly attribute marketing contribution to the capturing and updating of Salesforce

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records (leads and contacts). It can also help enhance some of the Salesforce reporting capabilities with Oracle Eloqua data. As a result, this can support more accurate troubleshooting, allowing you to distinguish changes made by another user for the integration from changes made for other reasons.

To create the Salesforce user for integration:

1. Create a new Salesforce user. We recommend using the following settings to make the user easily identifiable:
    - **First Name** - Eloqua
    - **Last Name** - Marketing
    - **Alias** - Eloqua
    - **Email** - your email address
    - **Username** - eloqua@example.com where *example* is your organization domain

> **Note:** Ideally, the password for this Salesforce user does not expire. Although password changes can be made within Oracle Eloqua, it requires that your Customer Administrator manages regular updates within Oracle Eloqua. See Resetting the Salesforce password in Oracle Eloqua

2. Configure the other fields as per your requirements.
3. Set up the user with sufficient access to create and update Salesforce data. We recommend the following:

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- Administrative access (recommended)
- Access to:
    - Create, update, and read Salesforce leads
    - Update and read Salesforce contacts
    - Read Salesforce accounts
    - Create campaign members and update campaign member status
    - Create and read campaigns
    - Create tasks on contact and lead records

4. Record this user name and password as needed.

Adding Oracle Eloqua to the list of trusted servers

You must permit Oracle Eloqua servers to interact with Salesforce. To do this, add the Oracle Eloqua IP addresses to the Salesforce list of approved or trusted servers (allowlist). For a list of IP ranges to add, see this knowledge base article or contact My Oracle Support (https://support.oracle.com).

Note: If you want to allow Oracle Eloqua employees (including support) to access your CRM system and troubleshoot issues, please complete this form. After you submit the form, you will receive Oracle Eloqua's corporate IPs to add to your allowlist.

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Preliminary Oracle Eloqua setup for your integration

Important: The Salesforce native integration was deprecated February 1, 2021. We recommend using the the Salesforce Integration app in its place. Learn more in our product notice.

Before you begin the Salesforce integration, complete these preliminary tasks in Oracle Eloqua:

- Confirming access to Oracle Eloqua integrations
- Run the integration wizard for the first time
- Disabling the internal and external queues
- Disabling auto synchs

Note: Before you complete the preliminary integration setup in Oracle Eloqua, complete the tasks in Preliminary Salesforce setup for your integration. You must be a member of the Customer Administrator security group in Oracle Eloqua to access the integration functionality and perform the configuration tasks.

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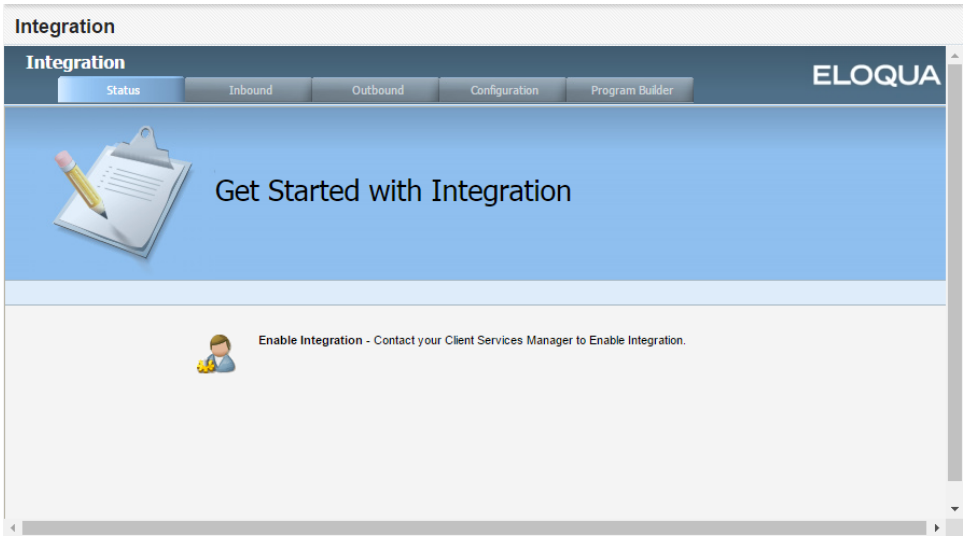
Confirming access to Oracle Eloqua integrations

You must confirm that you have access to Oracle Eloqua's integration functionality. If you discover integration is not enabled in your Oracle Eloqua instance, please log in to My Oracle Support (https://support.oracle.com) and create a service request.

To confirm access to the integration area in Oracle Eloqua

1. Click **Settings**.
2. Click **Integration** under *Platform Extensions*.

   If the feature is not available, the screen indicates that you have to contact support.



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Run the integration wizard for the first time

The CRM Integration Setup Wizard helps start the integration process. The wizard will verify the connection to Salesforce and setup the default configuration. Later, you disable some of these default configurations so that you can customize the integration with Salesforce.

> **Note**: The CRM Integration Setup Wizard only needs to be run one time.

Before you begin:

- Confirm that you have access to Oracle Eloqua's integration functionality
- Complete the preliminary setup in Salesforce. See Preliminary Salesforce setup for your integration for more information.

To run the integration wizard:

1. Click **Settings**.
2. Click **Integration** under *Platform Extensions*. If you have not run the CRM Integration Setup Wizard yet, the *CRM Integration Setup* window is displayed.
3. Click the **Configuration** tab.

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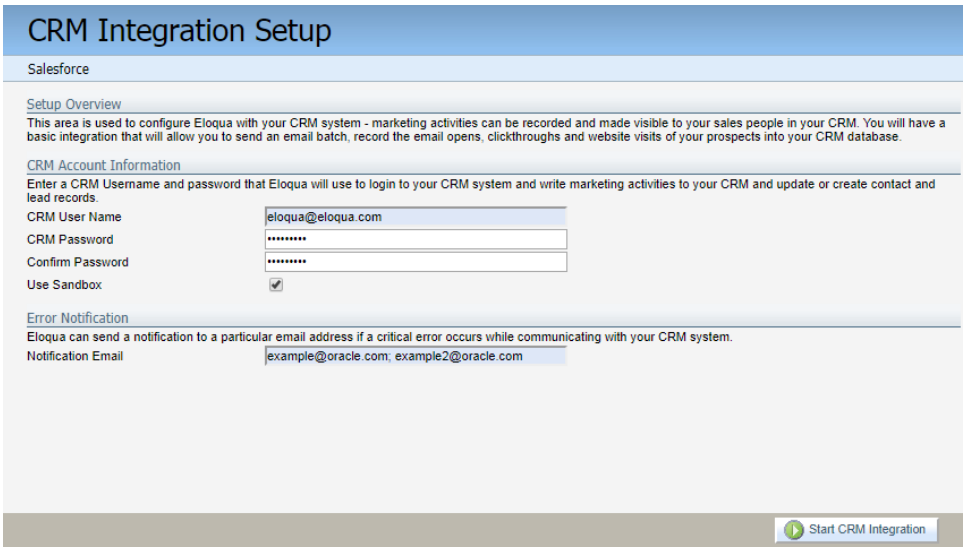
4. Enter the user name and password for the Salesforce user created for the integration. This is the user that Oracle Eloqua will use to connect with Salesforce.
5. To use a testing environment for the integration instead of your production instance, select the **Use Sandbox** check box. After you complete the integration, reset the user to your production environment and resend the data.

> **Note**: If you are using the Enterprise trim of Oracle Eloqua, you can request a sandbox. If you have the Basic or Standard trims, this is an add-on function. For more information on how to request access to the Replication Sandbox, please contact your account representative.

6. Enter the email address for the administrator who should be informed of critical errors in the **Notification Email** field. You can enter multiple email addresses by separating them with a semi-colon (;).



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7. Click **Start CRM Integration**.

   The wizard sets up a standard CRM integration with Salesforce. Oracle Eloqua displays the progress of the setup. The following table provides details about each setup step.

Setup step	Details
Validate CRM login	Checks that the CRM user name and password are accurate and that Oracle Eloqua can communicate with the Salesforce system.
Setup Eloqua business logic	Sets up the integration logic in Oracle Eloqua, which dictates the following: • When a lead in Salesforce doesn't exist, Oracle Eloqua creates a new lead in Salesforce. • When a lead in Salesforce exists, Oracle Eloqua updates the lead in Salesforce. • When a contact in Salesforce exists, Oracle Eloqua updates the contact in Salesforce. It is recommended that you do not create contacts or accounts from Oracle Eloqua. **Note**: This logic will be updated and customized using automated programs in Program Builder.
Examine CRM system configuration and field names	Pulls all of the data objects and associated fields from Salesforce for integration purposes. **Note**: The wizard attempts to create the necessary external calls to set up your integration and presents

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Setup step	Details
	errors for fields that are not accessible. Ensure that the specified fields are accessible to the Salesforce user as readable and writable fields. You cannot re-run the wizard, but you can manually update the external calls to select and map the fields. If these fields are not part of your set of integrated fields, then you can ignore this error.
Setup Eloqua data push and pull settings	Sets up external calls in Oracle Eloqua to update Salesforce and synchronize data back from Salesforce to Oracle Eloqua.
Setup Automatic Data Syncs from CRM system	Sets up the auto synchs to pull data from Salesforce.
Create web links	Creates the Oracle Eloqua web links *Contact Activity Overview* and *Lead Activity Overview*, which can be added to page layouts in Salesforce. This step also detects the current custom links on the lead and contact entities within Salesforce.
Enable CRM integration	Completes the CRM integration process and enables internal events and external calls.

After you finish: Disable the internal and external queues and auto synchs.

Disabling the internal and external queues

The CRM Integration Setup Wizard set up the processes to support the transfer of data between Oracle Eloqua and Salesforce. You must disable these processes so that you

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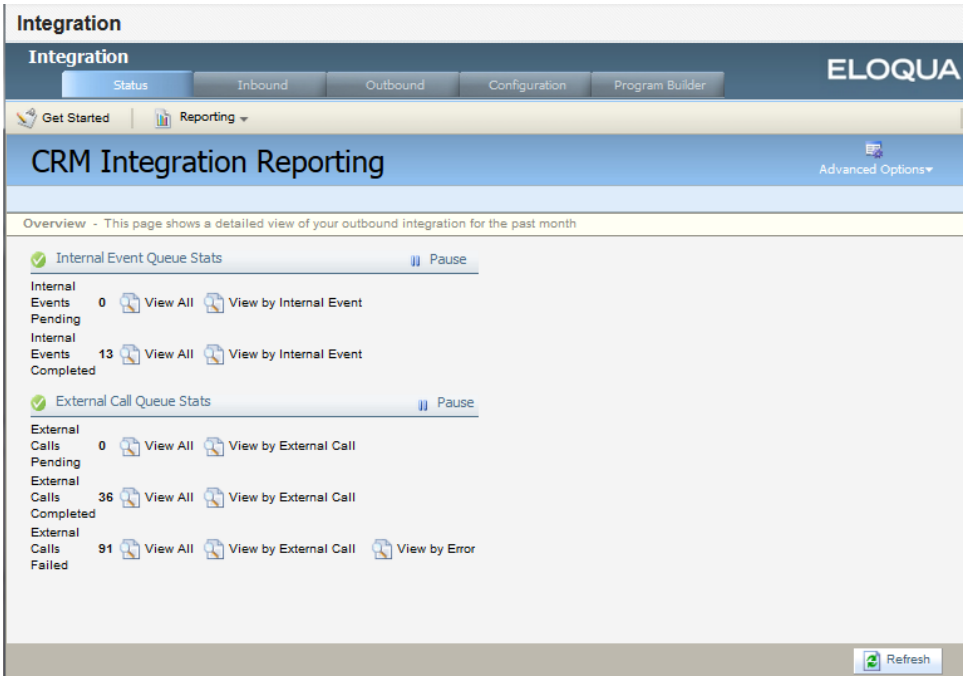
can customize the integration. Disabling these processes stops importing and exporting data during the configuraiton.

To disable the internal and external queues:

1. Click **Settings** .
2. Click **Integration** under *Platform Extensions*.
3. Click the **Status** tab. Click **Reporting**, then click **Integration Reporting**. The statuses of the internal and external event queues are displayed.



   If *Pause* is displayed for either of the queues, the data transfer is active.

4. Click **Pause**.

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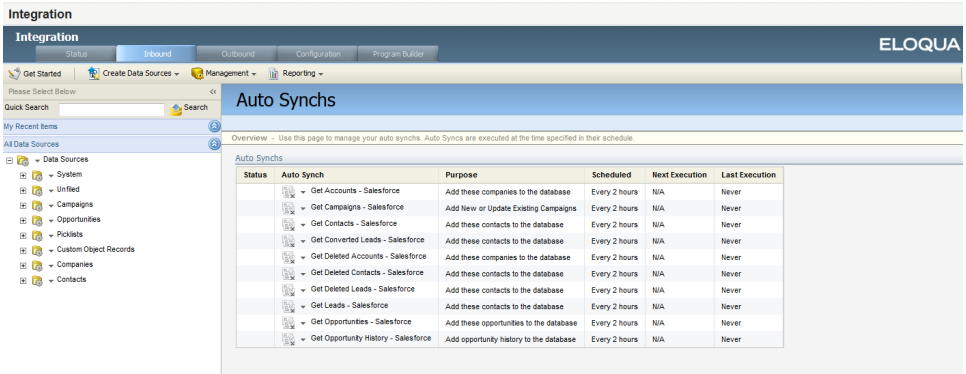
Disabling auto synchs

The CRM Integration Setup Wizard set up the processes to import data from Salesforce. You must disable the auto synchs to stop the imports during the configuration. For more information about auto-synchs, see CRM integration: auto-synchs.

To disable auto synchs:

1. Click **Settings** .
2. Click **Integration** under *Platform Extensions*.
3. Click the **Inbound** tab. Click **Management** and then click **Auto Synchs**.



4. For each auto synch in the list, select **Disable Auto Synch** from the drop-down list.

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Configuring data imports from Salesforce

Important: The Salesforce native integration was deprecated February 1, 2021. We recommend using the the Salesforce Integration app in its place. Learn more in our product notice.

Note: You must be a member of the Customer Administrator security group in Oracle Eloqua to access the integration functionality and perform the configuration tasks.

To integrate Salesforce and Oracle Eloqua, you must configure auto synchs. Auto synchs are scheduled imports to Oracle Eloqua. An auto synch defines the following:

- the import schedule
- the fields to synchronize
- the actions that Oracle Eloqua performs when the data is imported

After you ran the CRM Integration Setup Wizard for the first time, Oracle Eloqua set up the following auto synchs for importing account, contact, and lead data:

- Get Accounts
- Get Contacts
- Get Leads

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- Get Converted Leads
- Get Deleted Accounts
- Get Deleted Contacts
- Get Deleted Leads

For initial setup, you disabled all the auto synchs until you configured them. In your environment, you may have additional auto synchs for campaigns or opportunities. The configuration below is specific to importing Salesforce leads, contacts, and accounts.

Before you begin:

- If you haven't already, complete the preliminary Salesforce and Oracle Eloqua setup.
- Each auto synch configuration determines what fields are synchronized from Salesforce and how often they are synchronized. Review the settings in your auto syncs and customize them to meet your requirements if necessary.
- Refer to Auto synch settings for Salesforce integration for the recommended settings for each auto synch.

To configure auto synchs:

1. Click **Settings** .
2. Click **Integration** under *Platform Extensions*.
3. Click the **Inbound** tab.

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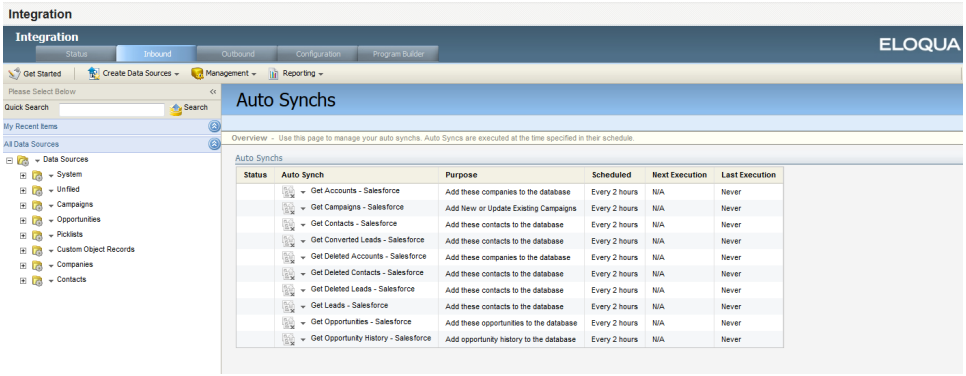
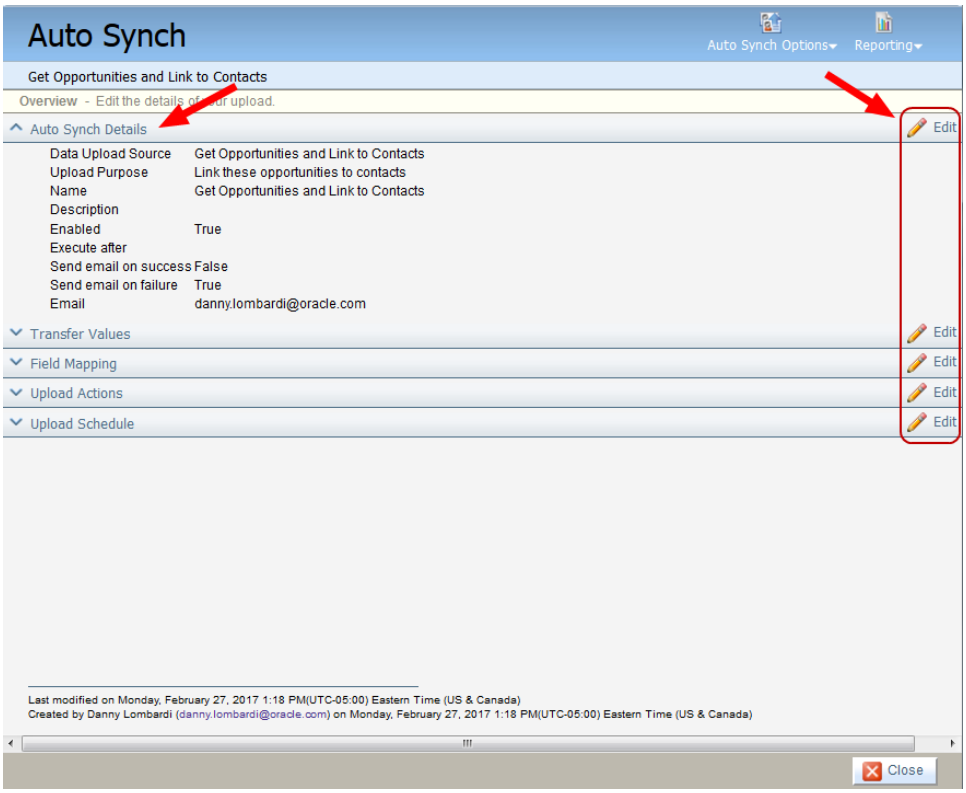
4. Click **Management > Auto Synchs**. All the existing auto synchs are listed.



5. For each auto synch in the list, click **Auto Synch Details** from the drop-down.

6. Click **Edit** and configure the auto synch. Refer to Auto synch settings for Salesforce integration for the recommended settings for account, contact, and lead auto synchs.



The following auto synchs need to be configured with the specifics of your field mappings between Oracle Eloqua and Salesforce fields:

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- Get Accounts
- Get Contacts
- Get Leads

The following auto synchs may require modifications to the filter criteria, depending on how often you want these synchronizations to run:

- Get Deleted Accounts
- Get Deleted Contacts
- Get Deleted Leads

Auto synch settings for Salesforce integration

Important: The Salesforce native integration was deprecated February 1, 2021. We recommend using the the Salesforce Integration app in its place. Learn more in our product notice.

After you ran the CRM Integration Setup Wizard for the first time, Oracle Eloqua set up the following auto synchs for importing account, contact, and lead data:

- Get Accounts
- Get Contacts
- Get Leads
- Get Converted Leads
- Get Deleted Accounts

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- Get Deleted Contacts
- Get Deleted Leads

When configuring auto synchs for Salesforce integration, use the settings below as guidelines. If a specific setting is not mentioned, you can use the existing configuration or leave it blank.

For information about setting up auto synchs for Salesforce, see Configuring data imports from Salesforce.

Upload schedule

You can change the auto synch synchronization schedule for account and contact data as required. It is recommended that you specify the following values:

- *Auto Synch Runs on Selected Days at 10pm EST?* — Select **No**.
- *Auto-Synch Runs or Repeats Once Every* **2.0** *hours*. You can specify values ranging from 30 minutes to 24 hours.
- *Auto Synch proceeds by Standard Business Schedule?* — Select **No**.
- In the calendar, specify the day the auto synch is to run, the start time to run the auto synch, and the end time.

Get Accounts auto synch

Auto Synch Setting Group	Setting
Auto Synch	**Upload Purpose**: Add these companies to the database.

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Auto Synch Setting Group	Setting
Details	
Transfer Values	**Action**: Retrieve **Entity**: Account **Filter Details**: Last Modified Date/Greater Than or Equal/Last Successful Upload
Field Mapping	**Uniquely Match On**: Eloqua Company Field: SFDC Account ID **Perform a case-sensitive match**: True
Upload Actions	**Add to Company Group**: SYSTEM - SFDC Accounts

Get Contacts auto synch

Auto Synch Setting Group	Setting
Auto Synch Details	**Upload Purpose**: Add these contacts to the database.
Transfer Values	**Action**: Retrieve **Entity**: Account **Filter Details**: Last Modified Date/Greater Than or Equal/Last Successful Upload AND

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Auto Synch Setting Group	Setting
	Email/Equals/%@%
Field Mapping	**Uniquely Match On**: Eloqua Company Field: Email Address **Perform a case-sensitive match**: False
Upload Actions	**Add to Contact Group**: SYSTEM - SFDC Contacts

Get Leads auto synch

Auto Synch Setting Group	Setting
Auto Synch Details	**Upload Purpose**: Add these contacts to the database.
Transfer Values	**Action**: Retrieve **Entity**: Lead **Filter Details**: Last Modified Date/Greater Than or Equal/Last Successful Upload AND Email/Equals/%@% AND Converted/Equals/FALSE
Field Mapping	**Uniquely Match On**: Eloqua Contact Field: Email Address

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Auto Synch Setting Group	Setting
	Perform a case-sensitive match: False
Upload Actions	**Add to Contact Group**: SYSTEM - SFDC Leads

Get Deleted Accounts auto synch

Auto Synch Setting Group	Setting
Auto Synch Details	**Upload Purpose**: Add these companies to the database.
Transfer Values	**Action**: Get Deleted **Entity**: Account **Filter Details**: Create the filter based on your field mappings.
Field Mapping	**Uniquely Match On**: Eloqua Company Field: SFDC Account ID **Perform a case-sensitive match**: True **Advanced Options**: Account ID > SFDC Account ID False False Deleted Date > [blank] False False **Update records with a set value**:

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Auto Synch Setting Group	Setting	
	Field	**Set to value**
	SFDC Account ID	[blank]
Upload Actions	**Add to Contact Group**: SYSTEM - SFDC Deleted Accounts	

Get Converted Leads auto synch

Auto Synch Setting Group	Setting
Auto Synch Details	**Upload Purpose**: Add these contacts to the database.
Transfer Values	**Action**: Retrieve **Entity**: Lead **Filter Details**: Last Modified Date/Greater Than or Equal/Last Successful Upload AND Email/Equals/%@% AND Converted/Equals/TRUE
Field Mapping	**Uniquely Match On**: Eloqua Contact Field: SFDC Lead ID **Perform a case-sensitive match**:

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Auto Synch Setting Group	Setting
	True **Advanced Options**: Lead: Email > Email Address False False Lead: Lead ID > SFDC LeadID False False **Update records with a set value**: **Field** **Set to value** SFDC LeadID [blank]
Upload Actions	**Add to Contact Group**: SYSTEM - SFDC Converted Leads

Get Deleted Contacts auto synch

Auto Synch Setting Group	Setting
Auto Synch Details	**Upload Purpose**: Add these contacts to the database.
Transfer Values	**Action**: Get Deleted **Entity**: Contact **Filter Details**: Create the filter based on your field mappings.
Field Mapping	**Uniquely Match On**: Eloqua Contact Field: SFDC Contact

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Auto Synch Setting Group	Setting
	ID **Perform a case-sensitive match**: True **Advanced Options**: Contact ID > SFDC ContactID False False Deleted Date > [blank] False False **Update records with a set value**: **Field** / **Set to value** SFDC ContactID / [blank] SFDC AccountID / [blank]
Upload Actions	**Add to Contact Group**: SYSTEM - SFDC Deleted Contacts

Get Deleted Leads auto synch

Auto Synch Setting Group	Setting
Auto Synch Details	**Upload Purpose**: Add these contacts to the database.
Transfer Values	**Action**: Get Deleted **Entity**: Lead **Filter Details**: Create the filter based on your field

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Auto Synch Setting Group	Setting
	mappings.
Field Mapping	**Uniquely Match On**: Eloqua Contact Field: ZZ - SFDCleadID **Perform a case-sensitive match**: True **Advanced Options**: Lead ID > ZZ - SFDCLead ID False False Deleted Date > [blank] False False **Update records with a set value**: **Field** **Set to value** ZZ - SFDCLeadID [blank]
Upload Actions	**Add to Contact Group**: SYSTEM - SFDC Deleted Leads

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Configuring data exports from Oracle Eloqua to Salesforce

Important: The Salesforce native integration was deprecated February 1, 2021. We recommend using the the Salesforce Integration app in its place. Learn more in our product notice.

After you configured the imports from Salesforce to Oracle Eloqua, you must configure the export of data from Oracle Eloqua to Salesforce.

Configuring data exports involves the following tasks:

- Configuring data priority for Salesforce integration
- Creating Salesforce fields in Oracle Eloqua
- Linking accounts to contacts for Salesforce integration
- Configuring external calls to send data to Salesforce
- Configuring Salesforce integration programs in Oracle Eloqua
- Enabling Salesforce activity writing

Note: The folders and paths discussed in this document are the defaults or recommendations. Your environment may use different names.

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Configuring data priority for Salesforce integration

Important: The Salesforce native integration was deprecated February 1, 2021. We recommend using the the Salesforce Integration app in its place. Learn more in our product notice.

Data priority specifies the order in which Oracle Eloqua evaluates sources of contact and account data and determines whether to update the data in the Oracle Eloqua database.

With a Salesforce integration, we recommend prioritizing CRM data imports over other data sources such as list uploads. This assumes that your CRM data is current and accurate and that your Salesforce contacts are given higher priority than your CRM leads. The recommended data priority order is:

1. Bulk API
2. Get CRM Accounts
3. Get CRM Contacts
4. Get CRM Leads

These data priorities will be shared by multiple data sources. For example, the data sources Get CRM Contacts and Delete CRM Contacts will use the same data priority setting of Get CRM Contacts. This ensures that Oracle Eloqua omits the specified ID

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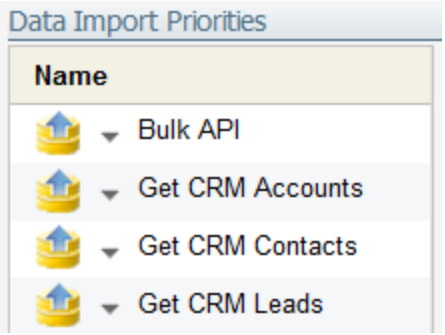
values and also allows for the ID values to be repopulated should the deleted entity be recreated in Salesforce.

To configure data import priority and the data sources:

1. Click **Settings**.
2. Click **Integration** under *Platform Extensions*.
3. Click the **Inbound** tab.
4. From the *Management* menu, click **Data Priority Order**.
5. Create the following list of data import priorities.

   The order of the data priorities must be the order listed below.



> **Tip**: After the running the CRM Integration Wizard, Oracle Eloqua created a default list of data import priorities. You can rename those items to match the list above or remove them and create your own list.

6. In the *Inbound* tab, expand the folders under **All Data Sources**. This folder lists all the data sources corresponding to each auto synch set up earlier.

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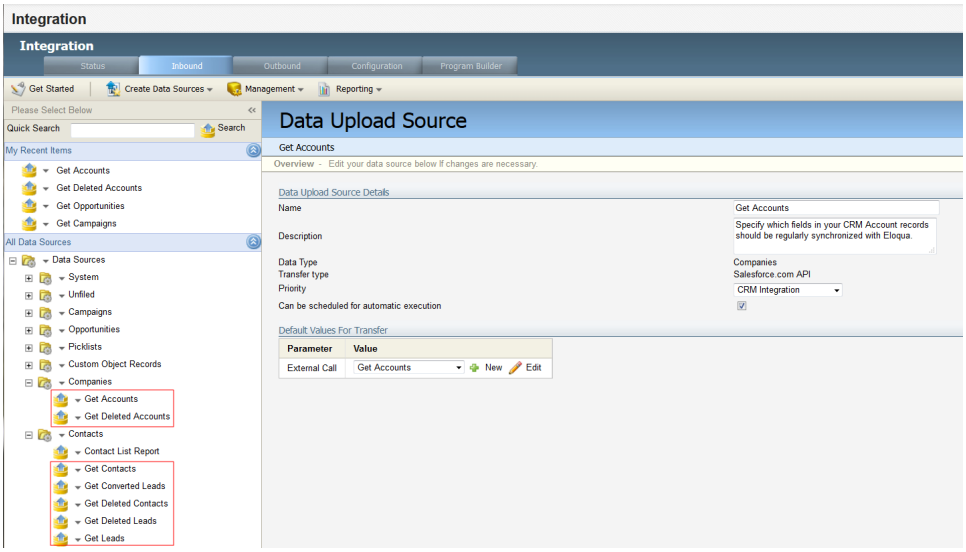

7. For each data source listed, set the priority using the **Priority** drop-down list with the following settings:

Data source	Data priority
Get Accounts	Get CRM Accounts
Get Deleted Accounts	Get CRM Accounts
Get Contacts	Get CRM Contacts
Get Deleted Contacts	Get CRM Contacts
Get Leads	Get CRM Leads
Get Deleted Leads	Get CRM Leads
Get Converted Leads	Get CRM Leads

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Creating Salesforce fields in Oracle Eloqua

Important: The Salesforce native integration was deprecated February 1, 2021. We recommend using the the Salesforce Integration app in its place. Learn more in our product notice.

By default, Oracle Eloqua offers a number of commonly used contact fields and account fields. But to complete the integration with Salesforce, you might need to create additional fields to match those in your Salesforce.

To do this, you can clone the Salesforce fields that you need. When you clone, any picklists associated to a field are also created.

Before you begin:

- Oracle Eloqua does not prevent you from creating duplicate fields. Before you create a field, confirm that it does not already exist to avoid creating duplicate fields. To view the contact and account fields available in Oracle Eloqua, click **Settings**  , then click **Manage Fields & Views**. See Fields and views for more information.
- Both Salesforce lead and contact data is stored in the Oracle Eloqua contact database. It is not necessary to create a contact field for each Salesforce entity type.
- It is recommended that you verify that picklist values are consistent across leads and contacts prior to record synchronization.

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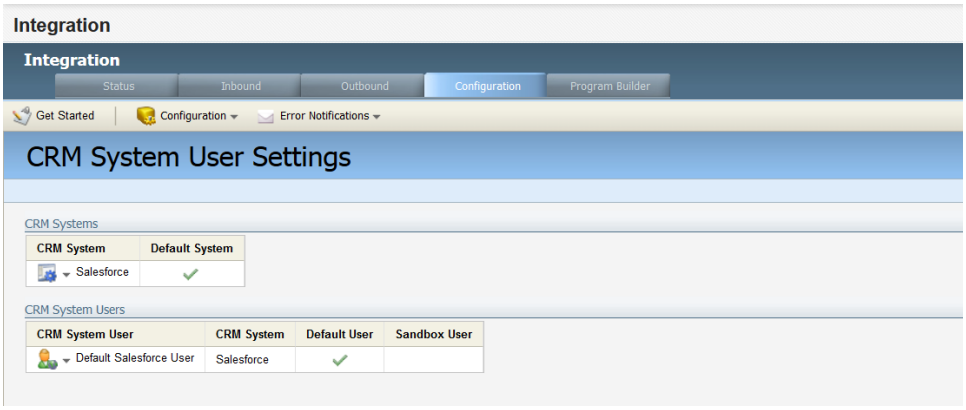
To create required Salesforce fields in Oracle Eloqua:

1. Click **Settings**.
2. Click **Integration** under *Platform Extensions*.
3. Click the **Configuration** tab.
4. From the **Configuration** menu, click **Manage CRM System Users**.



5. Click next to Salesforce, then click **List Fields**.
6. In the **CRM System Fields** window, select the entity for which you would like to view fields.

To view this	Select the following entity
Salesforce Accounts	Account (account)
Salesforce Contacts	Contact (contact)
Salesforce Leads	Lead (lead)

The list of Salesforce entity fields appears.

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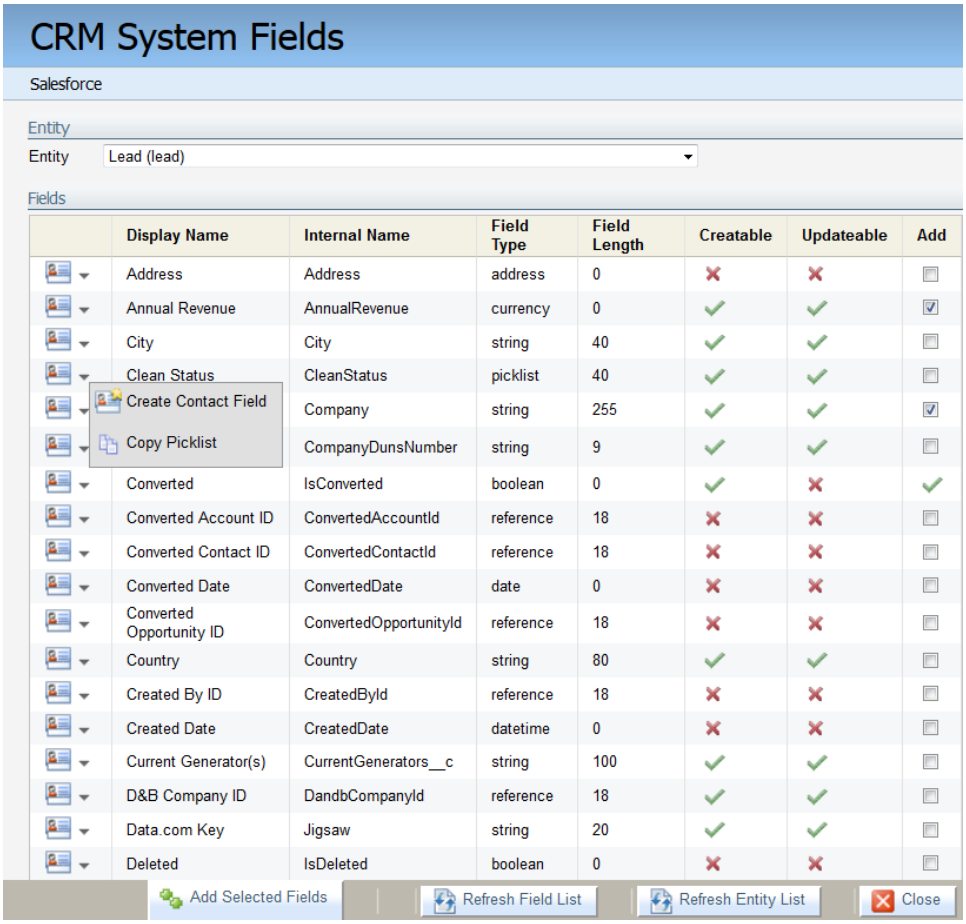
7. Select the fields you want to create in Oracle Eloqua and click **Add Selected Fields**.
    - You can add Salesforce fields to Oracle Eloqua one at a time or in a batch.
    - If a field has an associated picklistt, you *must create each one individually*, in order to correctly create the associated picklists.



8. Click **Close** when you're done.

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Linking accounts to contacts for Salesforce integration

Important: The Salesforce native integration was deprecated February 1, 2021. We recommend using the the Salesforce Integration app in its place. Learn more in our product notice.

For a Salesforce integration, you link accounts to contacts by mapping the Salesforce Account ID field. This ensures that any significant activity by a contact that is linked to an account is then associated with that account.

For more information, see Linking accounts to contacts.

Before you begin:

- Complete this task after you create Salesforce fields in Oracle Eloqua.
- When performing this task, ensure that you link accounts and contacts using the Salesforce Account ID field. Otherwise, contacts may be mapped to the wrong account, which could affect contact processing.

Note: After processing for the mappings has begun, it cannot be undone (rolled back or unmapped).

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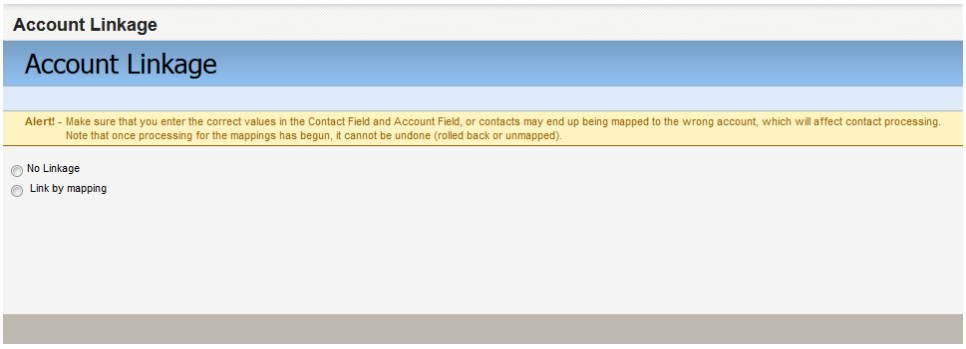
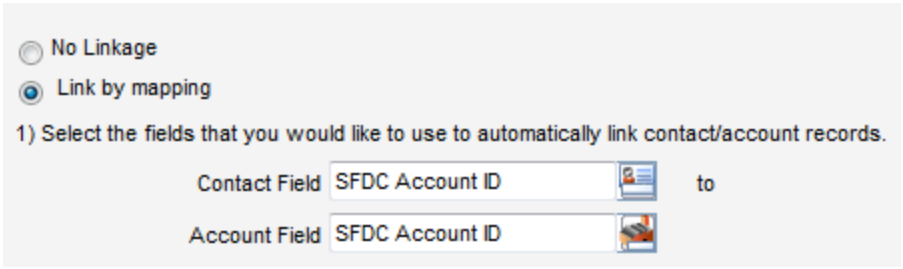
To link accounts to contacts:

1. Navigate to **Audience**, then **Tools**, then click **Account Linkage**.

   The *Account Linkage* page opens. By default, *No Linkage* is selected unless you've already linked a contact field to an account field.



2. Select **Link by mapping**.
3. Select the **SFDC Account ID** as the fields you want to use to automatically link contact and account records by. For more information, see Linking accounts to contacts.



4. Select the **Perform a case-sensitive match** check box since Salesforce uses case-sensitive matches.
5. Verify that the fields you've selected for the linkage pass the verification tests in step 2 and 3. A green check mark signifies a successful validation.

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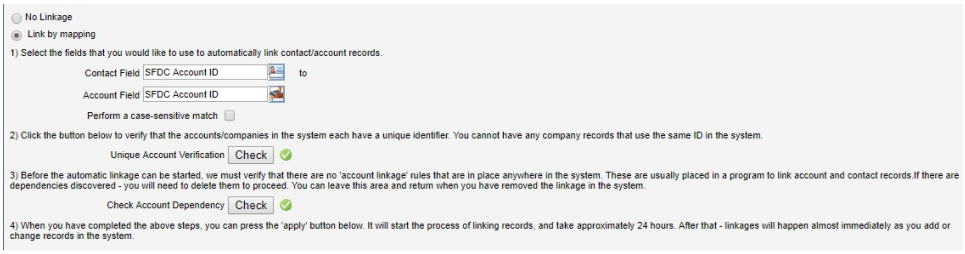
- *Unique Account Verification*: This process checks to ensure that all accounts have a unique value for the field you've selected. If verification fails, click **Show** to see a list of duplicates, then make any adjustments as needed.
- *Check Account Dependency*: This process searches for any conflicting automated programs steps that automate account linkage through a program built in the program builder or program canvas. View all of the marketing objects and processes in Oracle Eloqua that have the account field you selected as a dependency. This may include update source records, program ownership rules, deduplication or match rules, and any automated marketing programs that use any of these rules. If the dependency check fails, navigate to the programs and remove the conflicting program steps. You must resolve all of these dependencies before you can proceed with system-level linking.

Before continuing, the page should look like this:



6. When both checks are successful, click **Apply** to begin processing the linkage between the contact and account fields you selected.

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Configuring external calls to send data to Salesforce

Important: The Salesforce native integration was deprecated February 1, 2021. We recommend using the the Salesforce Integration app in its place. Learn more in our product notice.

External calls are the external CRM system calls that Oracle Eloqua uses to keep the systems synchronized. For general information about external calls, see Managing external calls.

There are two types of external calls:

- Retrieve Data: Calls that requests data from your CRM system. These are used by auto synchs.
- Send Data: Calls that send data to your CRM system. These are triggered by internal events.

When sending data to Salesforce, the external call settings determine what data to send from Oracle Eloqua. External calls use a field mapping to determine which Oracle Eloqua fields to send. External calls are triggered by internal events and internal events are executed through a Program Builder program.

After running the CRM Integration Wizard, Oracle Eloqua setup the following external calls to send data for each Salesforce entity (leads, contacts, accounts):

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- **Create Lead**: This call is used to create a new lead in Salesforce.
- **Update Lead**: This call is used to update an existing lead in Salesforce (based on Salesforce LeadID).
- **Update Contact**: This call is used to update an existing contact in Salesforce (based on Salesforce ContactID).
- **Associate Lead with Campaign**: This call is used to associate campaign members (based on Salesforce LeadID) with a Salesforce campaign. If you are implementing closed-loop reporting, see Closed-loop reporting with Salesforce for more information on setting up these external calls for campaign associations.
- **Associate Contact with Campaign**: This call is used to associate campaign members (based on Salesforce ContactID) with a Salesforce campaign. It also updates the status of the campaign response. If you are implementing closed-loop reporting, see Closed-loop reporting with Salesforce for more information on setting up these external calls for campaign associations.

Before you begin:

- Create the required Salesforce fields in Oracle Eloqua
- Setup how accounts are linked to contacts

To configure outbound external calls for your Salesforce integration:

1. Click **Settings** .
2. Click **Integration** under *Platform Extensions*.
3. Click the **Outbound** tab.

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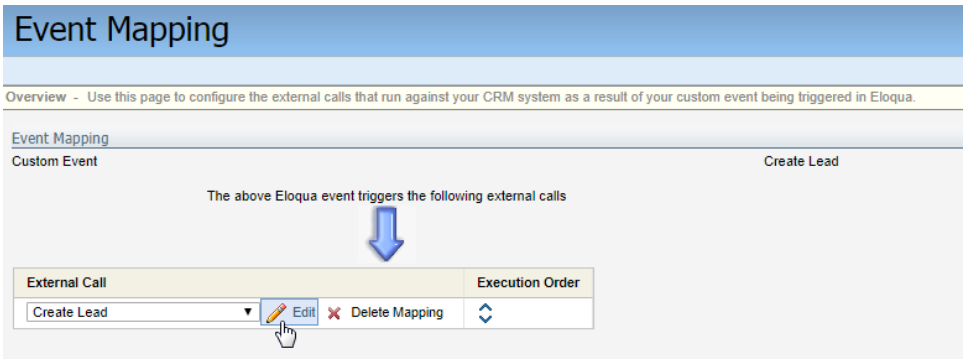
4. In the left panel, expand the **Custom** folder under the *Internal Events* tab, then expand **Custom Contact Events**.

5. Click on name of the event to be modified. Choose one of the following:
    - **Create Lead**.
    - **Update Contact**
    - **Update Lead**

6. Click **Edit** next to the external call you want to edit.



7. Review and edit the configuration details if necessary.
    - **Action**: The action that is performed and can include Create or Update.
    - **Entity**: The Salesforce entity that is affected in this call.
    - **Trigger Salesforce Default Assignment Rule**: Enable only if you are using lead assignment rules in Salesforce. Typically, leads are assigned only upon lead creation.
    - **Send Email Notification**: Enable only if you have specific lead owners who need to receive Salesforce-generated email notifications when a new lead is assigned.
    - **External Call Return Value**: These options allow you to select which Oracle Eloqua field is used to store the reference ID returned by Salesforce. This needs to be specified only for the Create Lead external call.

8. Select the **Options** menu, then select **View Field Mapping**. Confirm that the fields are mapped as follows:

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External Call	Salesforce Lead Fields	Oracle Eloqua Fields
Create Lead	City	City

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External Call	Salesforce Lead Fields	Oracle Eloqua Fields
	Company	Company

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External Call	Salesforce Lead Fields	Oracle Eloqua Fields
	Country	Country
	Email	Email Address
	Fax	Fax
	First Name	First Name
	Last Name	Last name
	Mobile Phone	Mobile Phone
	Phone	Business Phone
	Rating	SFDC Lead Rating
	State/Province	State or Province
	Street	Address 1 Line Break Address 2 Line Break Address 3 **Tip**: For Salesforce fields that need to be mapped from multiple Oracle Eloqua fields (such as the Salesforce Street field, which maps to Oracle Eloqua Address 1, Address 2, and Address 3 fields), use the drop-down next to the Salesforce field name to add line breaks between each of the Oracle Eloqua fields.
	Title	Title
	Zip/Postal Code	Zip or Postal Code

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External Call	Salesforce Lead Fields	Oracle Eloqua Fields
Update Lead	Lead ID	SFDCLeadID
	All of the Salesforce fields for Create Lead	All of the Oracle Eloqua fields for Create Lead
Update Contact	Contact ID	SFDCContactID

9. If you need to create a field mapping, drag the corresponding Oracle Eloqua field from the *Eloqua Fields* column to the *Field Expressions* column.
10. Click **Save** after you complete the mappings for the external call.
11. If you are not implementing closed-loop reporting, also review the campaign association events:
    - **Associate Lead with Campaign**
    - **Associate Contact with Campaign**

    These external calls should have the following field mappings:

External Call	Salesforce Lead Fields	Oracle Eloqua Fields
Associate Lead with Campaign	Campaign ID	Last SFDC Campaign ID
	Lead ID	SFDCLeadID
	Status	Last SFDC Campaign Status
Associate Contact with Campaign	Campaign ID	Last SFDC Campaign ID
	Contact ID	SFDCContactID
	Status	Last SFDC Campaign Status

Creating a custom campaign association external call

If you are not implementing closed-loop reporting, you must create an internal event that triggers both the *Create Lead* and *Associate Lead with Campaign* external calls.

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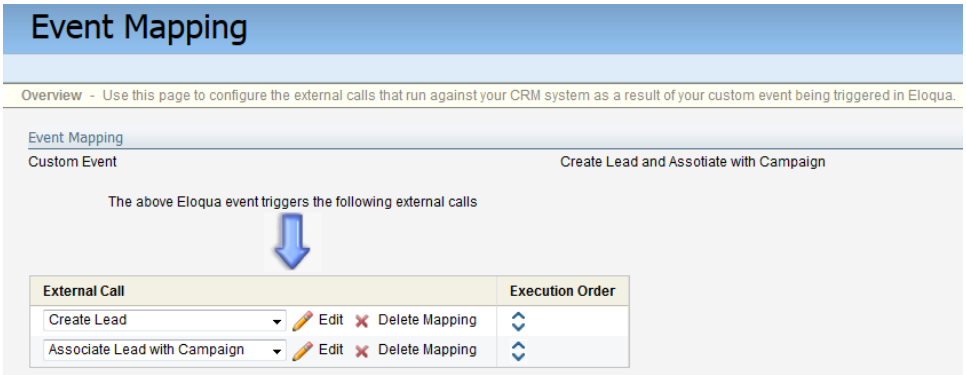
First the *Create Lead* API call is executed, then after the Salesforce lead ID has been returned, the *Associate to Campaign* API call is executed.



Note: You can only execute these Salesforce campaign association calls if you are not implementing closed-loop reporting. See Closed-loop reporting with Salesforce for more information on setting up these external calls for campaign associations.

To create a Salesforce campaign association call:

1. Click **Settings**.
2. Click **Integration** under *Platform Extensions*.
3. Click the **Outbound** tab.
4. In the *Internal Events* tab, expand the **Custom** folder under *All Internal Events*, then expand **Custom Contact Events**.
5. Click next to *Custom Contact Events*, then click **Create New Custom Event**.

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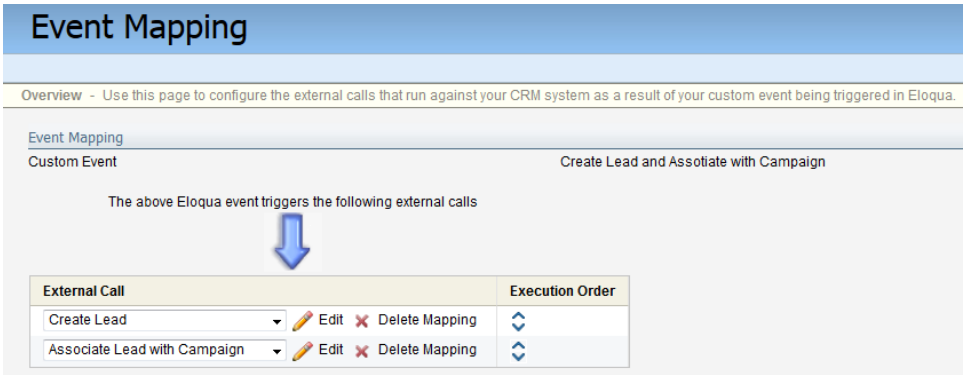
6. In the *Custom Event* window, enter the following **Custom Event Name**: Create Lead and Associate with Campaign.
7. Click **Save**. The new event appears in the navigation pane under *Custom Contact Events*.
8. Click the name of the new event.
9. From the *Event Mapping* window, click **Add Existing External Call** twice (you need to add two existing calls).
    - Select **Create Lead** as the first external call.
    - Select **Associate Lead with Campaign** as the second external call.



10. Click **Save**. A confirmation message appears if the save is successful.

Testing the external calls to Salesforce

Important: The Salesforce native integration was deprecated February 1, 2021. We recommend using the the Salesforce Integration app in its place. Learn more in our product notice.

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After configuring the external calls to Salesforce, it is recommended that you test the following external calls:

- Create Lead
- Update Lead
- Update Contact

Use the External Call Testing tool to perform a field-by-field audit of how fields are populated and updated in Salesforce.

> **Important**: Create a new Oracle Eloqua contact record to use for testing the Create Lead call. After successfully creating a new lead, make a change to the record in Oracle Eloqua before testing the Update Lead call so that you can confirm the update to the data.

To test outbound external calls:

1. Click **Settings**.
2. Click **Integration** under *Platform Extensions*.
3. Click the **Outbound** tab.
4. In the left panel, expand the **Send Data** folder under the *External Calls* tab, then expand both **Contact** and **Lead**.
5. Click next to the *Create Lead* external call, then click **Test External Call**.

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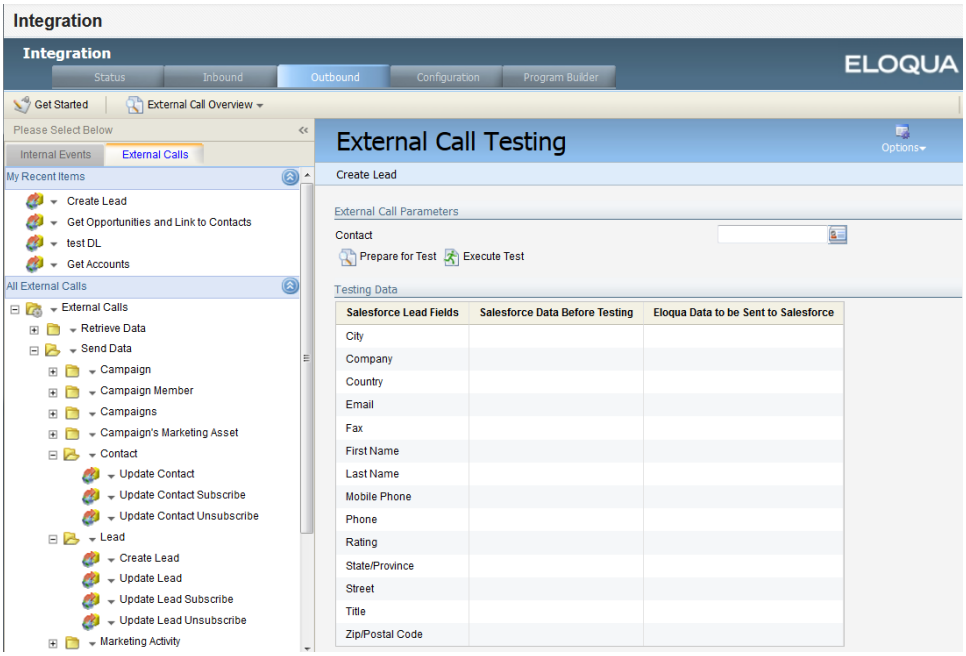
6. Click  in the *External Call Testing* window to locate the Oracle Eloqua record you want to use for testing.



7. In the *Contact Search* window, enter the contact name and perform the search.

8. Locate the record in the search results. Click next to the contact's email address, then click **Select item**.

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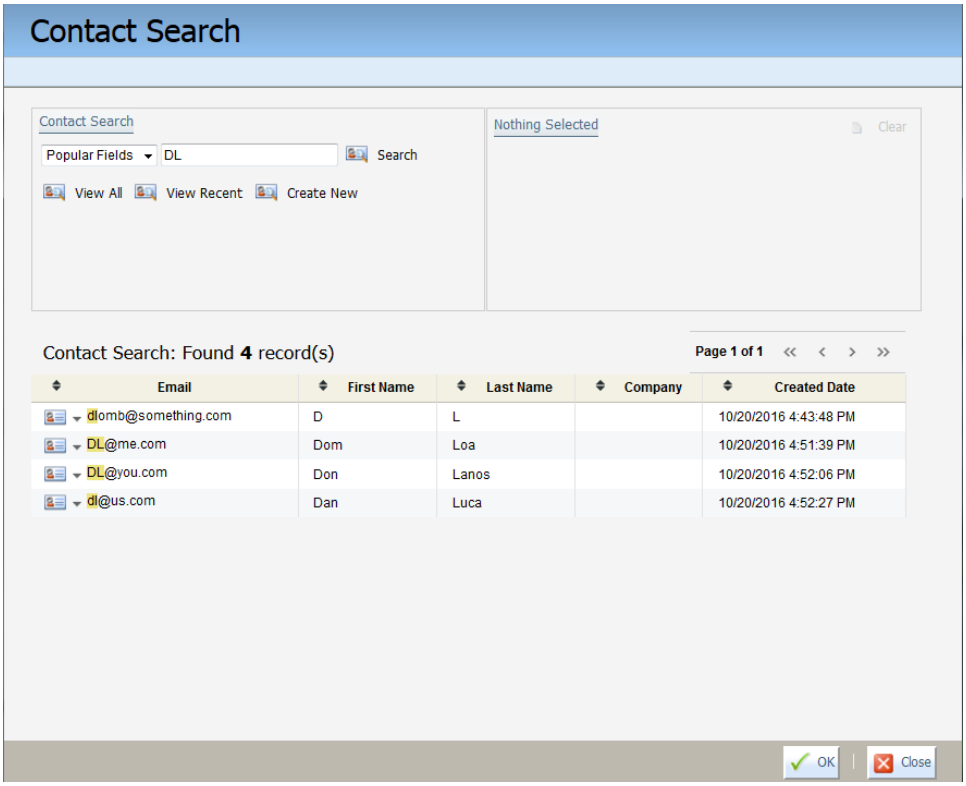

9. Click **OK**.
10. In the *External Call Testing* window, the selected contact's data is displayed in the table. Click **Prepare for Test** to view the state of the Salesforce database before and after the selected contact's data was sent.
11. Click **Execute Test** to complete the test.
12. Verify the results. The values in the *Eloqua Data to be Sent to Salesforce* column should match those in *Salesforce Data After Testing*. A banner message is displayed to indicate whether the test was successful.

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Configuring Salesforce integration programs in Oracle Eloqua

Important: The Salesforce native integration was deprecated February 1, 2021. We recommend using the the Salesforce Integration app in its place. Learn more in our product notice.

Important: This synchronization requires the use of programs built in Oracle Eloqua with Program Builder. If you're not familiar with programs in Oracle Eloqua, see Program Builder for an overview before continuing.

Oracle Eloqua programs automate when to trigger external calls to Salesforce. To integrate with Salesforce, Oracle Eloqua provides program templates that you will customize for your integration needs.

The following programs need to be setup to integrate Oracle Eloqua and Salesforce:

- **SYSTEM - CRM Email Opt Out program**: This program globally unsubscribes any Salesforce lead or contact that has the *Email Opt Out* flag checked in Salesforce from Oracle Eloqua. This ensures that your organization meets email compliance requirements and that the communication preferences of a record are synchronized across both systems. This program has standard logic and does not require additional configuration.

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For information on enabling the *Email Opt Out* program, see Enabling the email opt out program.

- **SYSTEM - CRM Update programs**: This is the primary integration program and determines how to update leads and contacts in Salesforce. There are two programs you can choose from: SYSTEM - CRM Update (Create only unique leads) and SYSTEM - CRM Update (Point of Interest).

  For information on choosing and configuring the CRM Update program, see Configuring the CRM update program

Enabling the email opt out program

> **Important**: The Salesforce native integration was deprecated February 1, 2021. We recommend using the the Salesforce Integration app in its place. Learn more in our product notice.

The SYSTEM - CRM Email Opt Out program globally unsubscribes any Salesforce lead or contact that has the *Email Opt Out* flag checked in Salesforce from Oracle Eloqua. This ensures that your organization meets email compliance requirements and that the communication preferences are synchronized across both systems. This program has standard logic and does not require configuration.

For an overview of the programs used in a Salesforce integration, see Configuring Salesforce integration programs in Oracle Eloqua.

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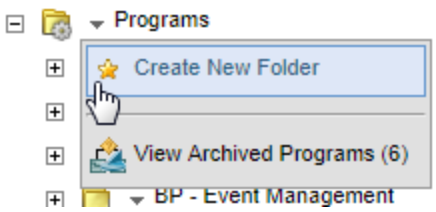
Note: The folders and paths discussed in this document are the defaults or recommendations. Your environment may use different names.

To enable the SYSTEM - CRM Email Opt Out program:

1. Click **Settings**.
2. Click **Integration** under *Platform Extensions*.
3. Click the **Program Builder** tab.
4. In the *Programs* tab, if a SYSTEM folder does not already exist, create the folder. To create a new folder, in the folder list, click next to *Programs*, then click **Create New Folder**.



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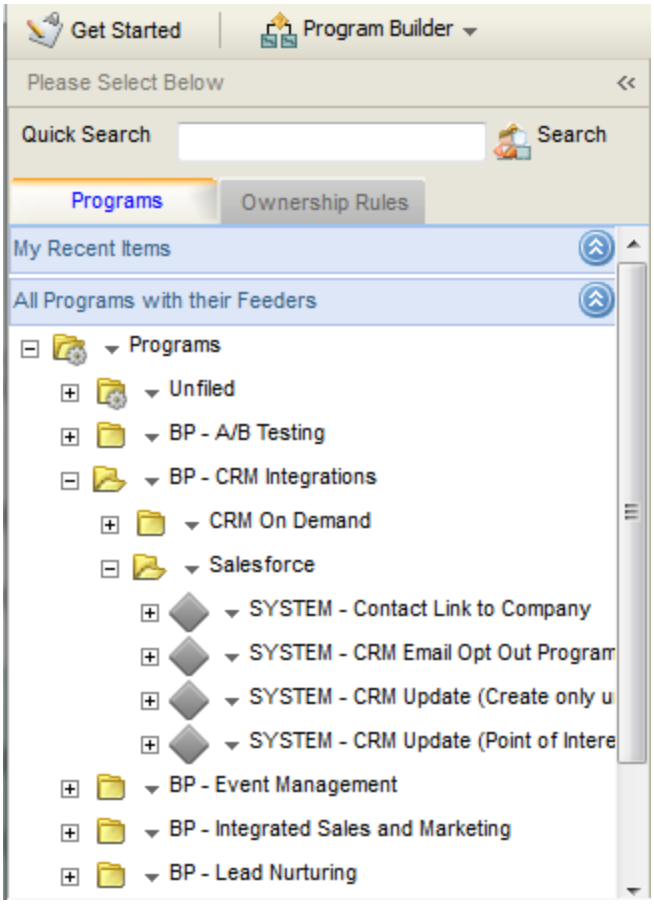
5. Navigate to the **BP - CRM Integrations** folder then open the **Salesforce** folder.



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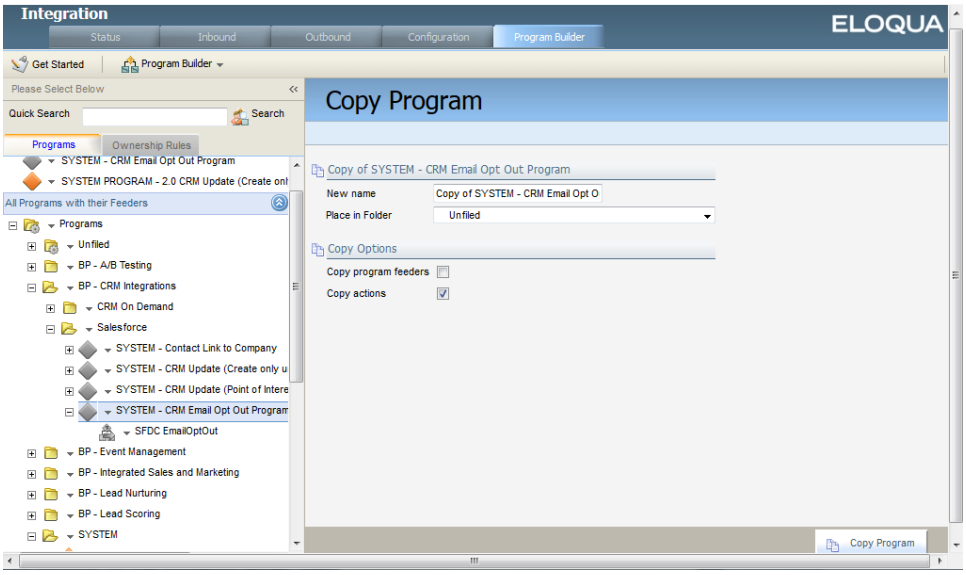
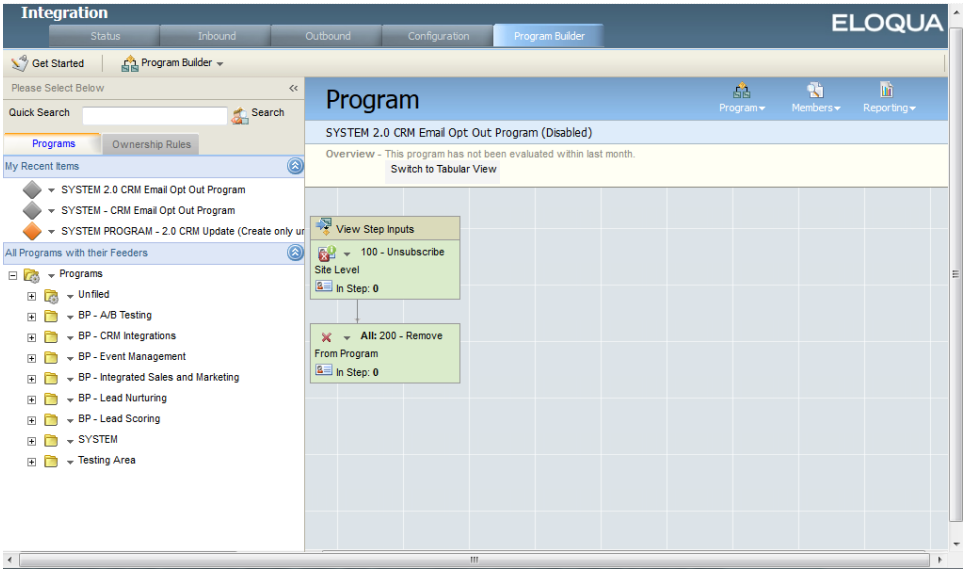
6. Copy **SYSTEM - CRM Email Opt Out Program** to the **SYSTEM** folder.
    a. Click **SYSTEM - CRM Email Opt Out Program**.
    b. Click the **Program** menu, then click **Copy Program**.



    c. Enter the name **System 2.0 SFDC Email Opt Out** and select the **SYSTEM** folder from the *Place in Folder* drop-down.
    d. Enable both of the options **Copy program feeders** and **Copy actions**.
    e. Click **Copy Program**.



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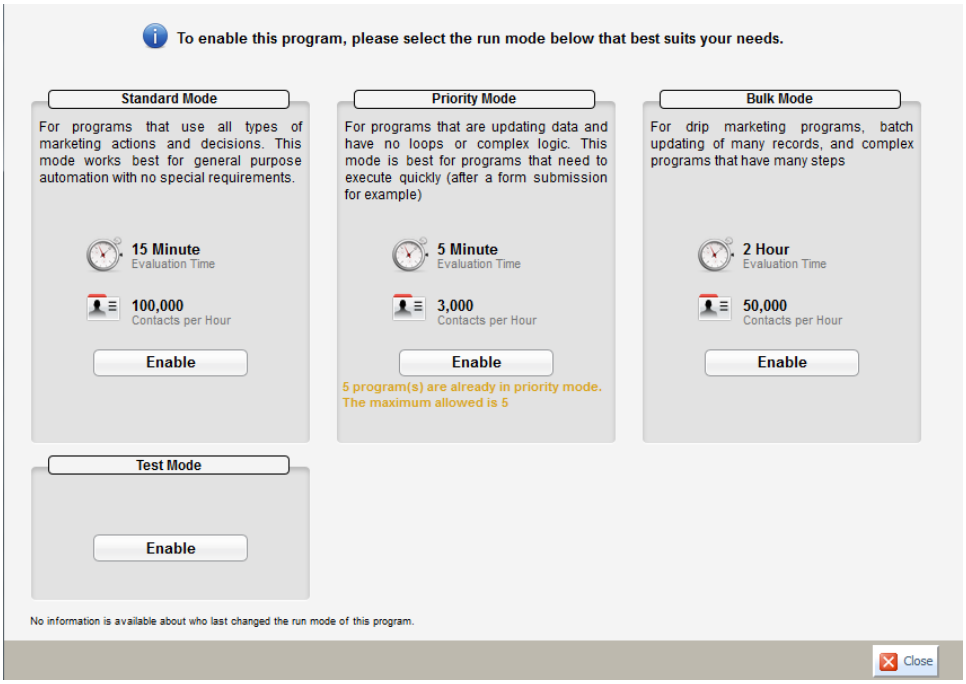
7. Navigate to program that you created. It should now appear in the *My Recent Items* list.
8. Click the **Program** menu, then click **Enable Program**.
9. If you are prompted to, enable the appropriate run mode based on the descriptions provided onscreen.



Note: It's recommended that you use standard mode for this.

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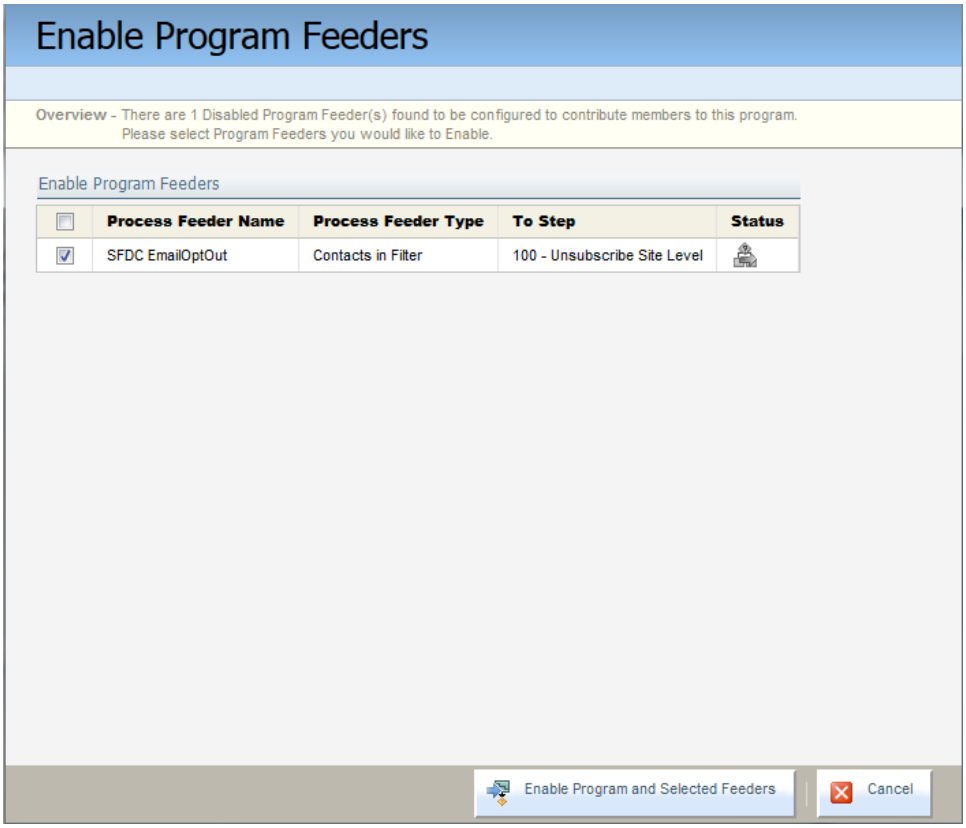
10. In the *Enable Program Feeders* window, select the check box next to the feeder.



11. Click **Enable Program and Selected Feeders**.

> **Note**: Verify that the program is active by confirming that the program workflow background is white and the program icon is no longer gray.

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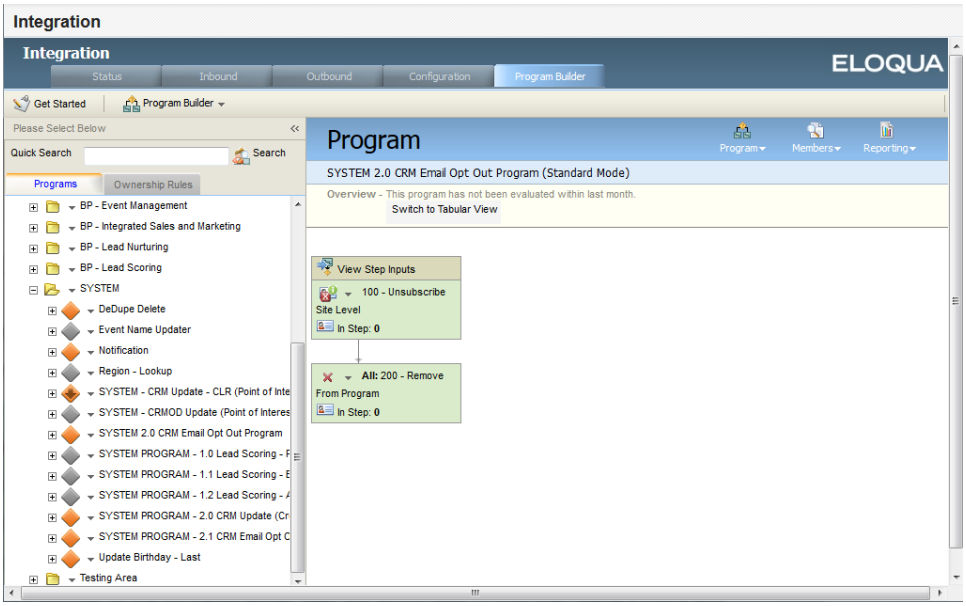

Configuring the CRM update program

Important: The Salesforce native integration was deprecated February 1, 2021. We recommend using the the Salesforce Integration app in its place. Learn more in our product notice.

The SYSTEM - CRM Update program is the primary integration program and determines how to update leads and contacts in Salesforce. There are two program templates you can choose from:

- SYSTEM - CRM Update (Create only unique leads) program: Creates a new lead record in Salesforce only if there is no existing lead or contact with the same email address. If there is an existing lead or contact, the program will update the existing entity instead of creating a new lead.

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- SYSTEM - CRM Update (Point of Interest) program: Creates a new lead record even if there is an existing lead or contact in Salesforce CRM.

Choose one of these programs to use for your Salesforce integration then configure the program according to the details provided in below.

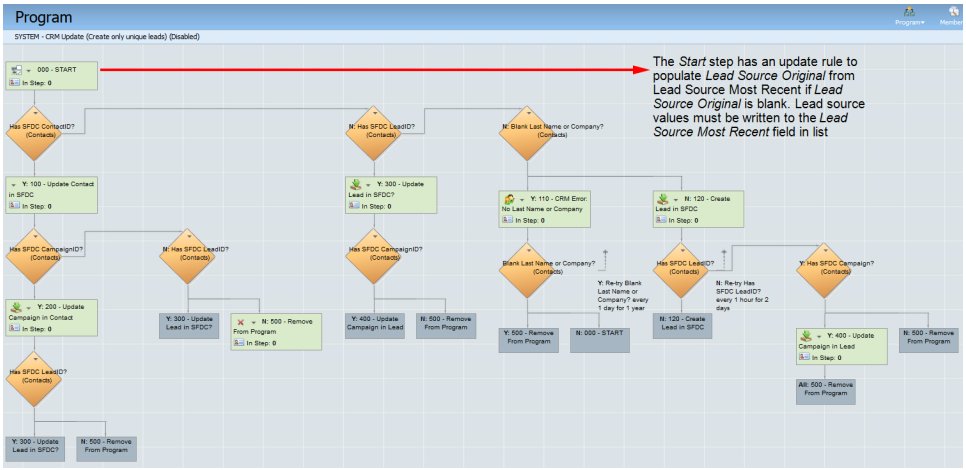
Note: If you do not have these program templates in your Oracle Eloqua instance, contact My Oracle Support (https://support.oracle.com).

Choosing the right CRM update program

Before you configure your CRM Update program you must choose a program template to use for your CRM update program.

About the SYSTEM - CRM Update (Create only unique leads) program

This program creates a new lead record in Salesforce only if there is no existing lead or contact with the same email address. If there is an existing lead or contact, the program will update the existing entity instead of creating a new lead.



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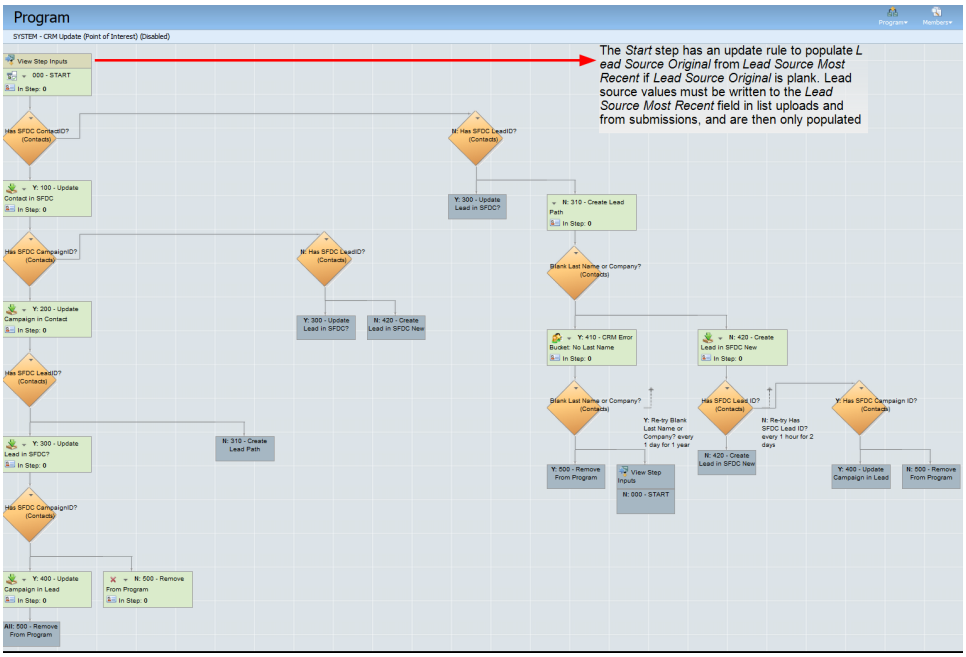
This program uses the following logic:

Has lead ID on Eloqua contact record?	Has contact ID on Eloqua contact record?	Action
No	No	Create Lead in Salesforce
Yes	No	Update Lead in Salesforce
Yes	Yes	Update Lead and Contact in Salesforce
No	Yes	Update Contact in Salesforce

About the SYSTEM - CRM Update (Point of Interest) program

This program creates a new lead record (or updates existing lead if one exists) even if there is an existing contact in Salesforce.



This program uses the following logic:

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Has lead ID on Eloqua contact record?	Has contact ID on Eloqua contact record?	Action
No	No	Create Lead in Salesforce
Yes	No	Update Lead in Salesforce
Yes	Yes	Update Lead and Contact in Salesforce
No	Yes	Create Lead and Update Contact in Salesforce

Configuring the selected SYSTEM - CRM Update program

It's recommended that you map no more than 50 fields in the update process to from Oracle Eloqua to Salesforce.

> **Note**: The folders and paths discussed in this document are the defaults or recommendations. Your environment may use different names.

Before you begin:

- Choose the appropriate program template to use for your integration. Refer to About the SYSTEM - CRM Update (Create only unique leads) program and About the SYSTEM - CRM Update (Point of Interest) program for more information.
- Configuring external calls to send data to Salesforce.

Configuring the SYSTEM - CRM Update program:

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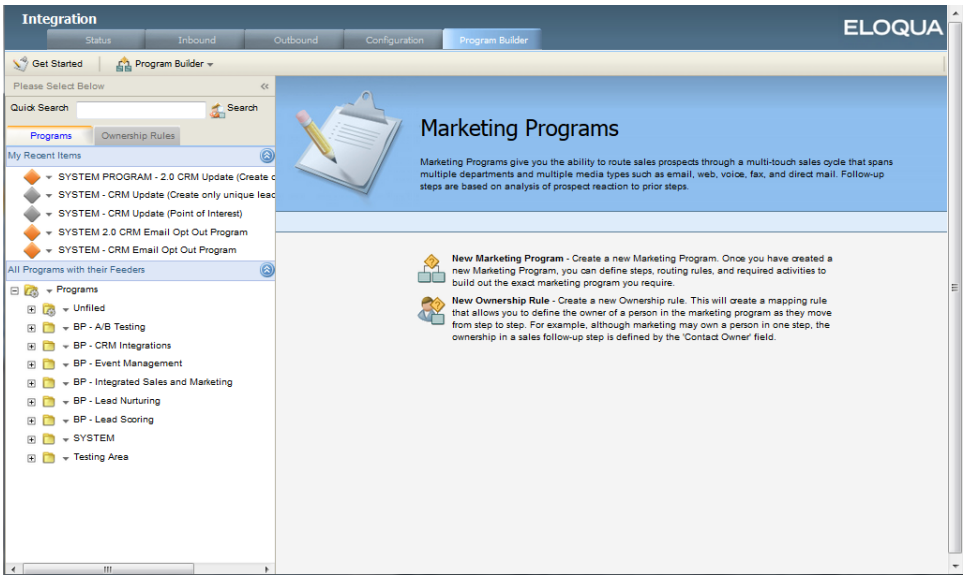
1. Click **Settings** .

2. Click **Integration** under *Platform Extensions*.

3. Click the **Program Builder** tab.



4. In the *Programs* tab, if a SYSTEM folder does not already exist, create the folder. To create a new folder, in the folder list, click next to *Programs*, then click **Create New Folder**.

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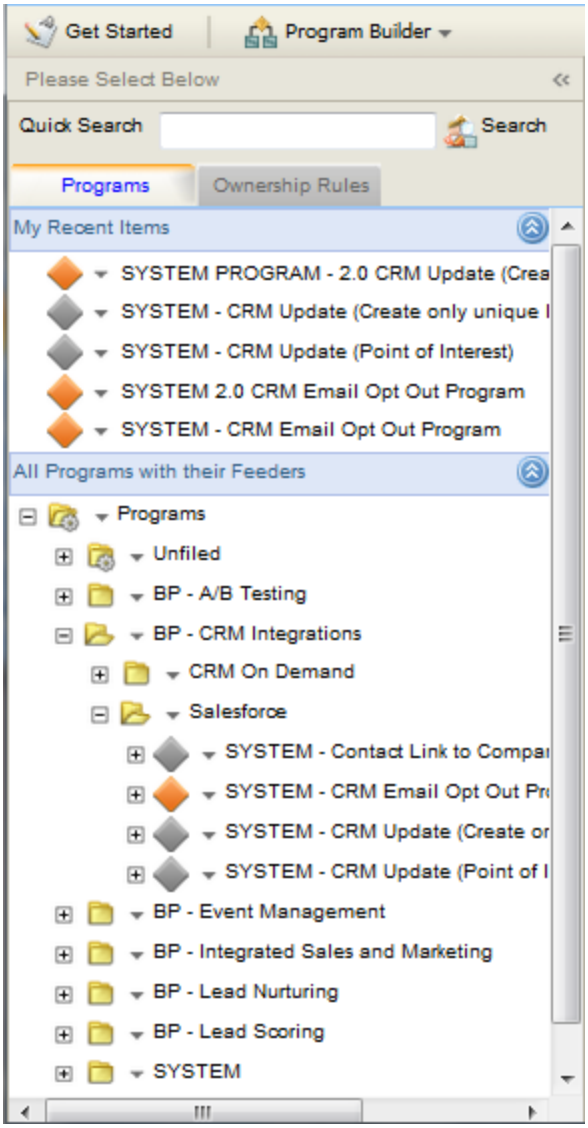
5. Navigate to the **BP - CRM Integrations** folder then open the **Salesforce** folder.



6. Locate the CRM Update program you have selected.
    - SYSTEM - CRM Update (Create only unique leads)
    - SYSTEM - CRM Update (Point of Interest)

7. Copy the CRM update program to the SYSTEM folder.
    a. Click the program name.

    b. Click the **Program** menu, then click **Copy Program**.

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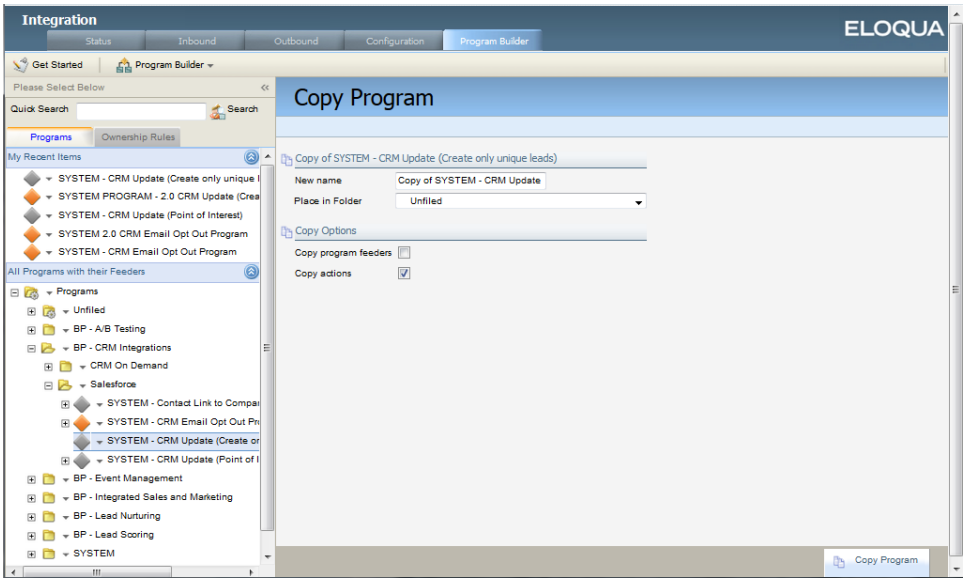

c. Enter the name **System 1.0 SFDC Update** and select the **SYSTEM** folder from the *Place in Folder* drop-down.

d. Enable both of the options **Copy program feeders** and **Copy actions**.

e. Click **Copy Program**.

8. Navigate to program that you created. It should now appear in the *My Recent Items* list.

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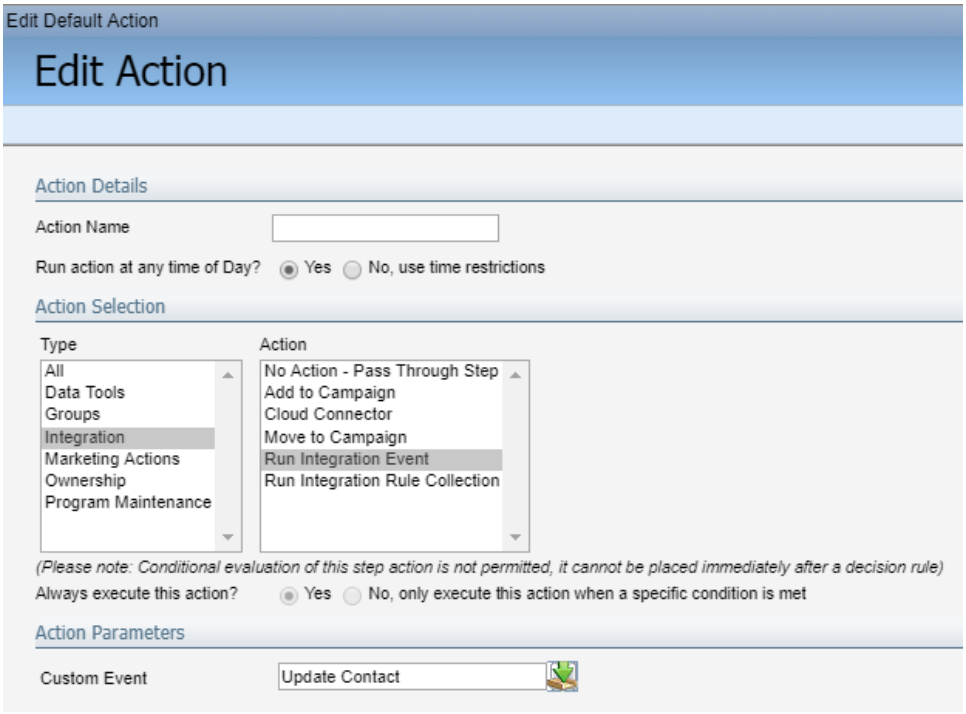
9. For each of the following steps, click next to the step name, then click **Edit Step Default Action** to configure the settings:
    - Update Contact in SFDC
    - Update Lead in SFDC
    - Create Lead in SFDC
10. Configure the settings for each step as follows:
    - The action can run at any time of day.
    - Select **Integration** as the action type and **Run Integration Event** as the action.
    - Select the **Custom Event** to run. The custom event you choose depends on the step you are updating. For example, the *Update Contact in SFDC* step should run the *Update Contact* event. For more information on these events, see Configuring external calls to send data to Salesforce.



11. Click **Save and Close**.

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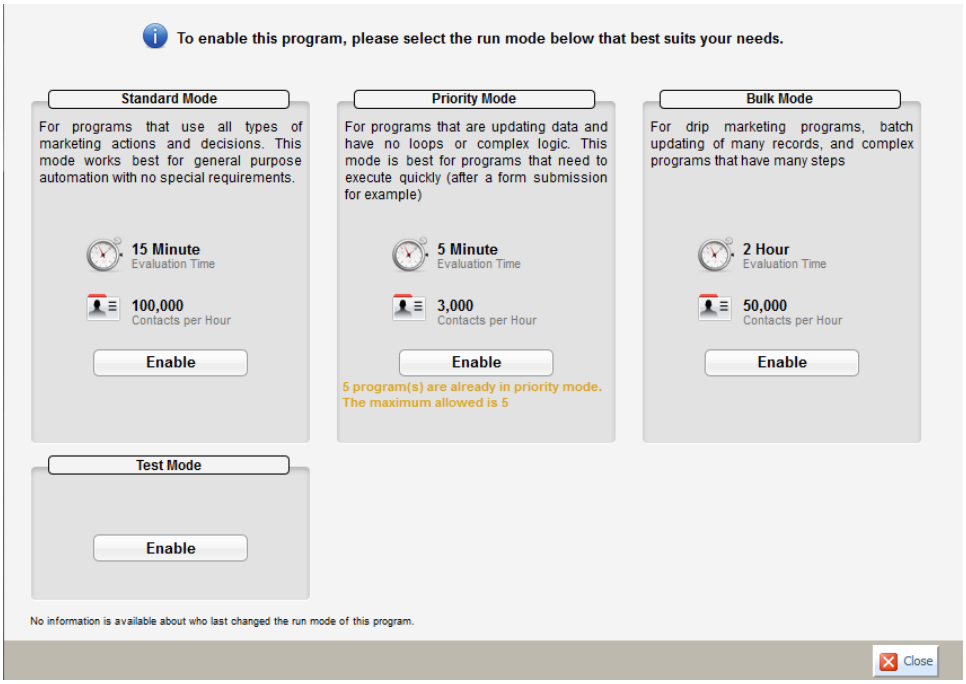
12. Choose an option:
    - If you are not implementing closed-loop reporting, update the campaign association steps to execute the applicable campaign association events. The steps you have to update will vary depending on the program template you are using. For example, the, *Update Campaign in Lead* and *Update Campaign in Contact* should execute the Campaign Custom Contact Internal Events *Associate Lead With Campaign* and *Associate Contact With Campaign* events. For more information on these events, see Configuring external calls to send data to Salesforce.
    - If you are implementing closed-loop reporting, See Closed-loop reporting with Salesforce for more information on setting up the program.
13. After configuring all the steps, click the **Program** menu, then click **Enable Program**.
14. If you are prompted to, enable the appropriate run mode based on the descriptions provided onscreen.



Note: It's recommended that you use priority mode for this program.

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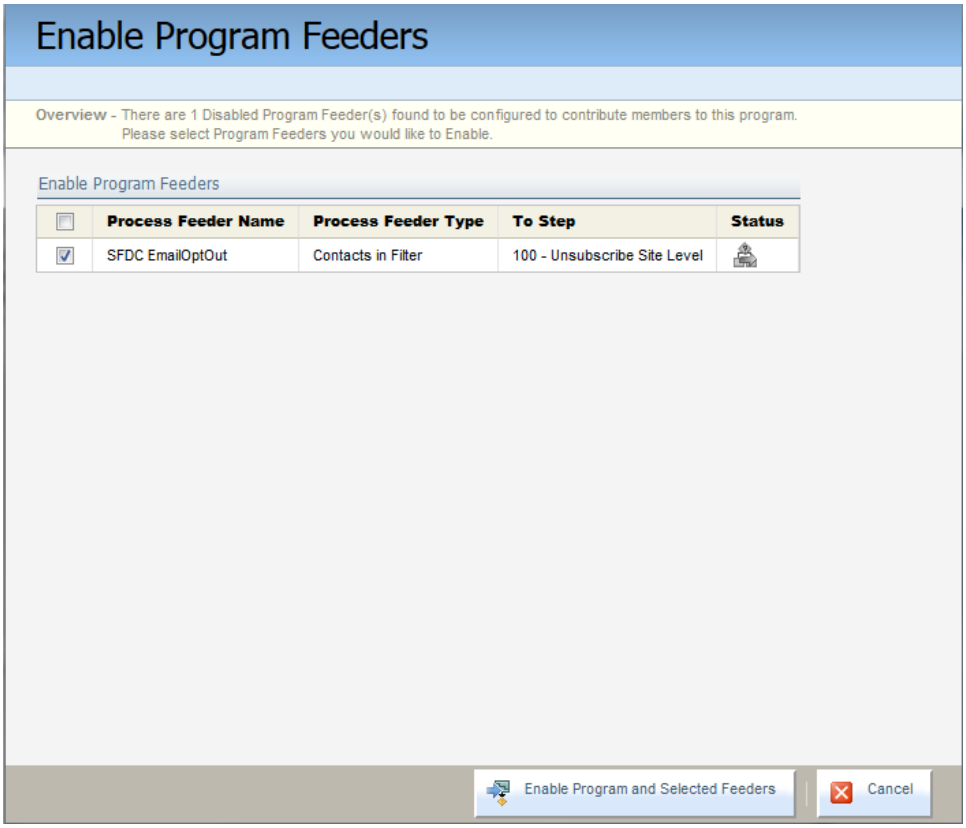
15. In the *Enable Program Feeders* window, check the box next to the feeder.



16. Click **Enable Program and Selected Feeders**.

> **Note**: Verify that the program is active by confirming that the program workflow background is white and the program icon is no longer gray.

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Enabling Salesforce activity writing

> **Important**: The Salesforce native integration was deprecated February 1, 2021. We recommend using the the Salesforce Integration app in its place. Learn more in our product notice.

Activity writing allows Oracle Eloqua-tracked activities, such as email clickthroughs, website visits, and form submissions, to be written to Salesforce as closed tasks. These tasks are associated with the Salesforce contact or lead who performed the activity. Because these tasks can be resource-intensive in terms of Salesforce storage space, it is important to determine which ones provide the most useful information.

We recommend handling the following activities:

- Email bounceback
- Email clickthrough
- Email open
- Email subscribe
- Email unsubscribe
- Form submit
- Website visit

These activities are written to Salesforce in a synchronous queue and require no configuration other than enabling them. Should there be a temporary problem with

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the destination Salesforce system, Oracle Eloqua stores activities in a queue, which is processed when Salesforce access issues have been resolved.

To enable Salesforce activity writing in Oracle Eloqua:

1. Click **Settings**  .
2. Click **Integration** under *Platform Extensions*.
3. Click the **Outbound** tab.
4. Expand the **Activity** folder. All available internal events (activities) are listed.
5. For each of the Oracle Eloqua activities that you want to be sent to Salesforce, click next to the internal event name and enable it from the drop-down menu.

   These are the events that you are recommended to enable:

   - Email bounceback
   - Email clickthrough
   - Email open
   - Email subscribe
   - Email unsubscribe
   - Form submit
   - Website visit

> **Important**: Do not enable *Email send*. This activity generates significant volume and does not provide useful information. If you want to share information about email

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sends, you can use an Oracle Eloqua report or a Profiler report (Profiler provides you information in real-time).

The status of the activity is indicated by the icon displayed before its name:

-  (green) - The activity is currently enabled.
-  (gray) - The activity is disabled.

⊙ **Tip**: After you enable the required activities, it is good practice to test them to ensure the activity is being written to Salesforce as closed tasks.

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Initializing and monitoring the Salesforce integration

Important: The Salesforce native integration was deprecated February 1, 2021. We recommend using the the Salesforce Integration app in its place. Learn more in our product notice.

Auto synchs and queues were disabled during the preliminary setup process for this integration. With the required synchs and queues created and the integration configurations completed, you can now re-initialize the system and configure notifications for the ongoing monitoring and maintenance of the integration.

This section includes the following tasks:

- Re-enabling the auto synchs
- Enabling the internal and external queues
- Configuring system error notifications

Re-enabling the auto synchs

Now that you have completed the tasks for configuring data synchronization from Oracle Eloqua to Salesforce, you can re-enable the auto-synchs previously disabled.

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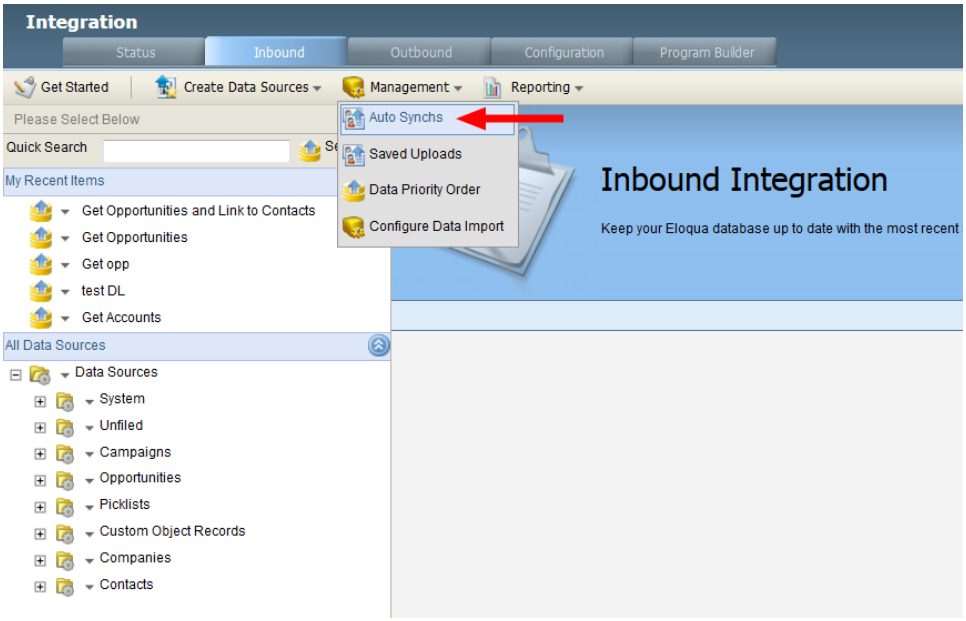
To enable auto synchs:

1. Click **Settings** .
2. Click **Integration** under *Platform Extensions*.
3. Click the **Inbound** tab.
4. Select **Auto Synchs** from the *Management* menu.



5. Click the **Get Deleted Accounts** auto synch in the *Auto Synch* column. All the existing auto syncs are listed. A green check mark beside an auto synch indicates that it completed successfully the last time it ran.

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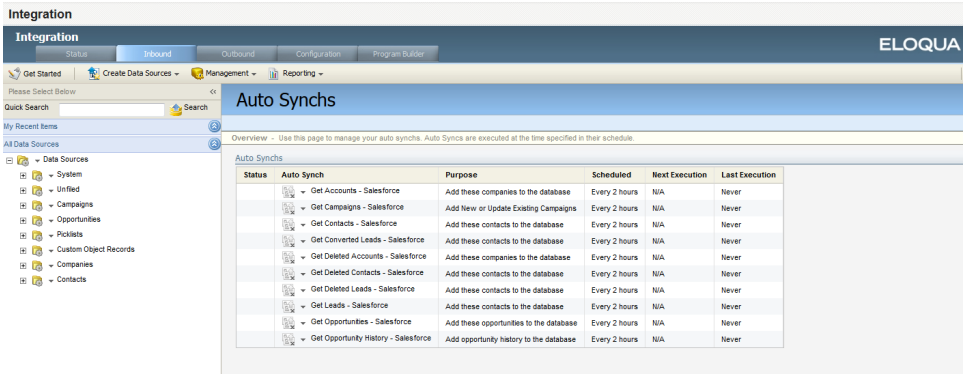

6. In the *Auto Synch* window, click **Edit** for the *Auto Synch Details* group.
7. Check the **Enabled** box in the *Upload Details* window.
8. For notification purposes, update the *Email* field with the address of your Salesforce or Oracle Eloqua administrator. You can specify multiple recipients using a semicolon (;) as a separator. You can update the address at any time.
9. You can enable the following notification options:
    - **Send Email on Success**: This sends a notification email each time the auto synch is executed successfully. Although these notifications are not mandatory on an ongoing basis, it is a good idea to select this initially as you complete and test the Salesforce integration.
    - **Send Email on Failure**: This sends a notification email each time the auto synch fails. The notification explains the cause of failure (for example, inaccessible Salesforce fields, or changes in CRM user password). This notification should always be enabled.
10. Click **Save and Close**.
11. Click **Close** in the *Auto Synch* window.
12. If you want to run the auto synchs now, rather than wait for the scheduled upload, click ▼ next to the auto synch name, then click **Run Auto Synch**.

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13. Repeat this process for each of the seven integration auto synchs.

> **Important**: This is the recommended order for enabling the remaining auto synchs: Get Accounts, Get Deleted Leads, Get Converted Leads, Get Leads, Get Deleted Contacts, Get Contacts.

Enabling the internal and external queues

As part of the initial preparations for this integration, you disabled both internal events and external calls. You can now re-enable the queues or confirm that they are already enabled.

To enable the internal and external queues:

1. Click **Settings** .
2. Click **Integration** under *Platform Extensions*.
3. In the *Status* tab, click the **Reporting** menu, then click **Integration Reporting**.
4. Click **Enable** beside both the *Internal Event Queue Stats* and *External Call Queue Stats* headings. The option to enable appears only if you previously disabled the queue. If *Pause* is currently displayed, the queue is already enabled

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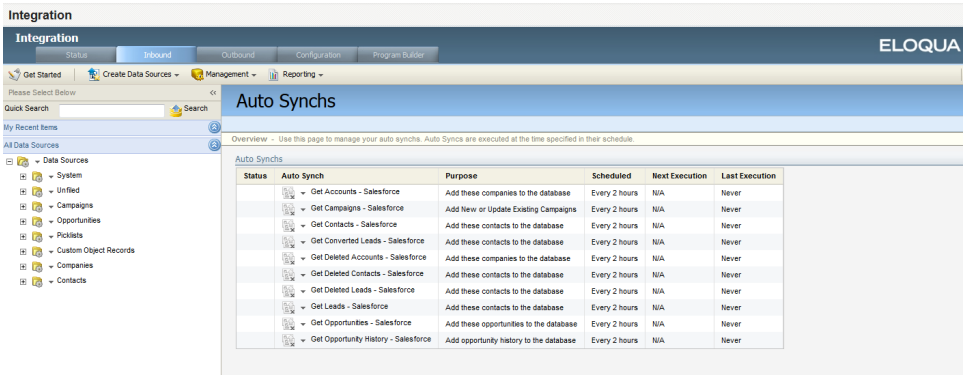
Validating auto synch processing

After you have configured the account, contact, and lead auto synchs, verify that they are running correctly.

To test your auto synchs:

1. Click **Settings**.
2. Click **Integration** under *Platform Extensions*.
3. Click the **Inbound** tab.
4. In the *Management* menu, click **Auto Synchs**. All the existing auto syncs are listed. A green check mark beside an auto synch indicates that it was successfully completed the last time it ran.



5. To view historical processing data for an auto synch, click on the name of the auto synch in the *Auto Synchs* area.
6. From the *Reporting* menu, click **Auto Synch History**.

   A report is displayed that lists status details for each run of the auto synch. You can:

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- Print the report or export it to Excel by clicking the options in the *Export* menu.
- View more detailed information about a specific auto synch processing run by selecting the down arrow in the first column of the table, then clicking **View Upload Details**.

Configuring system error notifications

With both the integration auto synchs and the internal and external queues re-enabled, you can now set up error notifications.

Errors can cause issues with the Salesforce integration. Configure error notifications to send alert emails when specified errors occur. Determine who on your team should receive these notifications on an on-going basis. These are the recommended errors to trigger notification:

External Call: (All)	Error: CRM Login Error
External Call: Create Lead	Error: (All)
External Call: Update Lead	Error: (All)
External Call: Update Contact	Error: (All)

To configure error notifications:

1. Click **Settings**.
2. Click **Integration** under *Platform Extensions*.
3. In the *Configuration* tab, select **Manage Error Notifications** on the *Error Notifications* menu. The Integration Error Notifications window opens.

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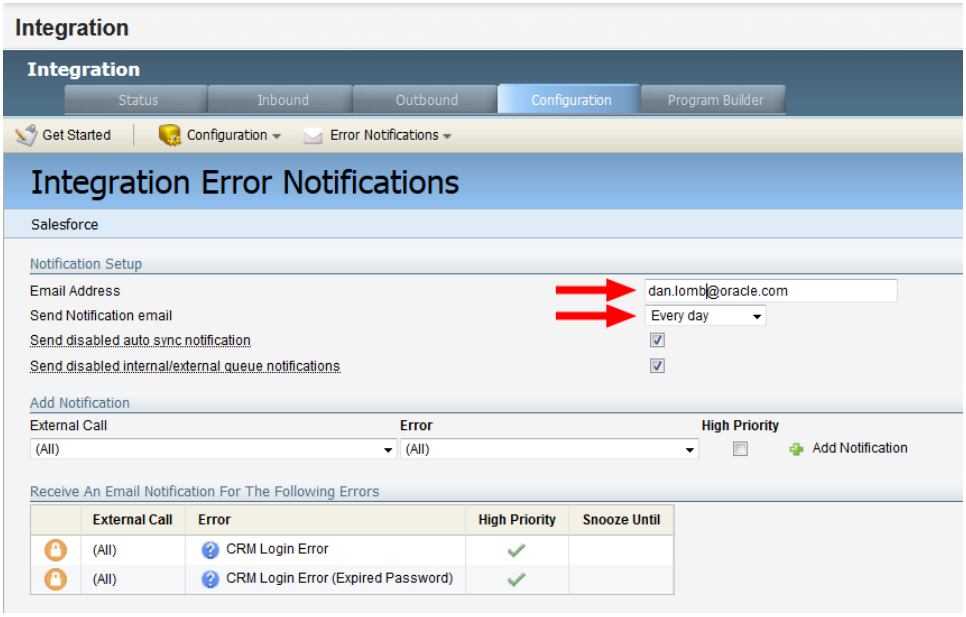
4. In the *Notification Setup* area, enter the **Email Address** for the notification recipient and select the frequency with which the email will be sent.



5. In the *Add Notification* area, select the external call and the specific error that should trigger a notification. It is typically a good idea to select **(All)** for the error type. You can also select whether this is a high priority error, which overrides the defined schedule and sends a notification every hour.
6. Click **Add Notification**. The notification appears in the *Receive An Email For The Following Errors* table.
7. Repeat to add more error notifications.
8. Click **Save**.

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Resetting the Salesforce password in Oracle Eloqua

Important: The Salesforce native integration was deprecated February 1, 2021. We recommend using the the Salesforce Integration app in its place. Learn more in our product notice.

If the user set up for the ongoing data exchange between Oracle Eloqua and Salesforce was set up with a password expiration, then you will need to reset the password when it expires. For more information on this user account, see Preliminary Salesforce setup for your integration.

To update an expired Salesforce password in Oracle Eloqua:

1. Click **Settings**  .
2. Click **Integration** under *Platform Extensions*.
3. Click the **Configuration** tab.
4. Click **Manage CRM System Users** in the *Configuration* menu.

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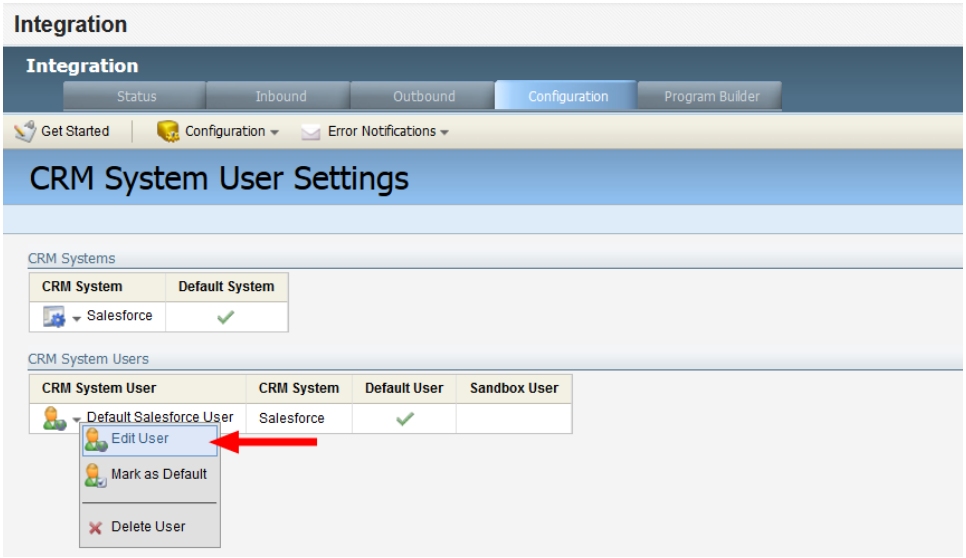
5. In the *CRM System Users* area, click next to *Default Salesforce User*, then click **Edit User**.



6. Click **Change Password** in the *CRM System User* window.
7. In the *Change Password* window, enter the new password in the **New Password** and **Re-Type Password** boxes.
8. Click **Change**.
9. Click **Save and Close**.

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