Oracle Sales Cloud
Integrating with Oracle Marketing Cloud

Release 13 (update 18C)
# Oracle Sales Cloud
## Integrating with Oracle Marketing Cloud

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Preface

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

Using Oracle Applications

Using Applications Help

Use help icons to access help in the application. If you don’t see any help icons on your page, click your user image or name in the global header and select Show Help Icons. Not all pages have help icons. You can also access Oracle Applications Help.

Watch: This video tutorial shows you how to find help and use help features.

You can also read Using Applications Help.

Additional Resources

- **Community**: Use Oracle Cloud Customer Connect to get information from experts at Oracle, the partner community, and other users.

- **Guides and Videos**: Go to the Oracle Help Center to find guides and videos.

- **Training**: Take courses on Oracle Cloud from Oracle University.

Conventions

The following table explains the text conventions used in this guide.

<table>
<thead>
<tr>
<th>Convention</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>boldface</td>
<td>Boldface type indicates user interface elements, navigation paths, or values you enter or select.</td>
</tr>
<tr>
<td>monospace</td>
<td>Monospace type indicates file, folder, and directory names, code examples, commands, and URLs.</td>
</tr>
<tr>
<td>&gt;</td>
<td>Greater than symbol separates elements in a navigation path.</td>
</tr>
</tbody>
</table>

Documentation Accessibility

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

Videos included in this guide are provided as a media alternative for text-based help topics also available in this guide.
Contacting Oracle

Access to Oracle Support

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1 Introduction

Integrating Oracle Sales Cloud and Oracle Marketing Cloud: Overview

This document outlines the implementation and configuration steps that are required to integrate Oracle Sales Cloud and Oracle Marketing Cloud processes. The integration aligns sales and marketing activities across the buying cycle by connecting the Segmentation, Campaign Management, and Lead Generation processes in Oracle Marketing with Lead, Contact and Account Management processes in Oracle Sales.

The integration supports three main process flows:

• Oracle Sales Cloud account, contact, and lead data is synchronized to Oracle Marketing Cloud where it can be used to perform segmentation, and to run targeted marketing campaigns to generate new sales leads.

• Leads generated from marketing campaigns in Oracle Marketing are nurtured and synchronized with Oracle Sales Cloud as sales leads.

• Oracle Sales Cloud opportunity data is synchronized to Oracle Marketing Cloud where it can be used to develop models to measure campaign effectiveness. For example, opportunity revenue can be attributed to marketing campaigns allowing you to calculate the ROI from the campaign.

The integration also provides the following features:

• Preconfigured reports and dashboards in Oracle Marketing Cloud provide information on the relationship between opportunities in Oracle Sales Cloud and contact responses generated in Oracle Marketing Cloud (closed loop reporting).

• You can display or access digital activities data maintained in Oracle Marketing Cloud from within the Oracle Sales Cloud UI to better understand a contact’s digital channel activities and buying behaviors.
For example, you can optionally display an embedded digital profile infolet on the Contact - Overview page, as shown in the following figure. The digital profile infolet displays information such as the number of times a user has submitted a form or visited a Web site in response to a campaign.

This integration document is designed to be used as a template. It is a starting point that shows how Oracle Sales Cloud and Oracle Marketing Cloud can be connected to create a value-added business process and user experience. An implementor must enter the documented configurations to create the integration.

However, the integration is not a turnkey solution. Each customer’s implementation of Oracle Sales Cloud and Oracle Marketing Cloud is unique, and each customer has different needs that have led them to implement application customizations that support their unique business requirements. While the steps in this document describe how to connect a non-customized Oracle Sales Cloud instance to a non-customized Oracle Marketing Cloud instance, they can be combined with customizations that have already been applied to a customer’s instances.

Data Integration Process Flows

The integration supports the following data integration process flows:

- Synchronizing Account, Contact, Lead and Opportunity Data from Oracle Sales Cloud to Oracle Marketing Cloud
- Synchronizing Lead and Contact Data to Oracle Sales Cloud from Oracle Marketing Cloud

Each of these data integration flows is described in the following topics.
About Synchronizing Account, Contact, Lead and Opportunity Data from Sales Cloud to Marketing Cloud

The data integration process flow from Sales to Marketing synchronizes accounts, contacts, leads and opportunities in Oracle Sales Cloud with Oracle Marketing Cloud.

The data flow is illustrated in the following figure.

Detailed Synchronization Process

When you go live with the Oracle Sales Cloud to Oracle Marketing Cloud integration, account, contact, and lead historical data is synchronized to Oracle Marketing Cloud. Subsequently, account, contact, lead and opportunity data is synchronized using an incremental process.

The integration uses Oracle Eloqua Auto Synch functionality to schedule imports of data from Oracle Sales Cloud into your Oracle Marketing Cloud system. External calls defined for each auto synch allow you to determine how fields are mapped for an object, which fields are synchronized for each object, and the synchronization schedule. For information on the auto synchs used in the integration, and the external calls they use, see the chapter Configuring Data Synchronization from Sales Cloud to Marketing Cloud.

Note: When a Sales account, contact, lead or opportunity is synchronized to Oracle Marketing Cloud, the corresponding record in Oracle Marketing Cloud is tagged with the CRM ID of the original Sales Cloud record.

Synchronization of Contact Data

In the Oracle Marketing Cloud user interface, Sales Cloud contacts display as contacts. Contact data is synchronized as follows:

- Only Sales Cloud contacts with an email address are synchronized.
When contact records are synchronized, they are matched using the contact’s email address. If a record with a matching email address exists in Oracle Marketing Cloud, it is updated. Otherwise, a new contact is created in Oracle Marketing Cloud.

- A contact’s primary address, phone number and email are synchronized.
- When Sales Cloud contact records are deleted or merged, these changes are not synchronized to Oracle Marketing Cloud.

### Duplicate Record Processing

Oracle Marketing Cloud uniquely identifies records based on email address. When contact records in Oracle Sales Cloud with the same email address are imported into Oracle Marketing Cloud at the same time, duplicates are merged into a single, complete 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 figure provides an example of duplicate contact record processing.

<table>
<thead>
<tr>
<th>Duplicate Sales Cloud Contact Records</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email</td>
</tr>
<tr>
<td>-------</td>
</tr>
<tr>
<td><a href="mailto:bob@email.com">bob@email.com</a></td>
</tr>
<tr>
<td><a href="mailto:bob@email.com">bob@email.com</a></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Final Marketing Contact Record</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email</td>
</tr>
<tr>
<td>-------</td>
</tr>
<tr>
<td><a href="mailto:bob@email.com">bob@email.com</a></td>
</tr>
</tbody>
</table>

**Note:** It is recommended that you remove duplicate sales records before integrating with Oracle Marketing Cloud. Historical duplicate data is not maintained.

### Synchronization of Account Data

All new and updated account records are synchronized to Oracle Marketing Cloud. In the Oracle Marketing Cloud UI, Oracle Sales accounts display as accounts. The primary address and primary phone details for each account are synchronized.

When account records are synchronized, they are matched using the Oracle Sales Cloud Account ID. If a record with a matching CRM account ID exists in Oracle Marketing Cloud, it is updated. Otherwise, a new account is created in Oracle Marketing Cloud. Only a contact’s primary account is associated with the contact in Oracle Marketing Cloud, even if the contact is associated with more than one account in Oracle Sales Cloud.

Deletions and merges of Sales Cloud account records are synchronized to Oracle Marketing Cloud.

### Synchronization of Lead Data

Leads from Oracle Sales Cloud are synchronized to Oracle Marketing Cloud as Lead custom objects. Leads are matched using the Oracle Sales Cloud Lead ID. If a record with a matching CRM Lead ID exists in Oracle Marketing Cloud, it is updated. Otherwise, a new lead is created in Oracle Marketing Cloud.
Lead records are linked to Marketing Cloud contacts using the email address on the Sales Cloud lead record. Only one contact is associated with each lead synchronized. In Oracle Marketing Cloud, a lead can only be associated to one contact, but a contact can be associated to multiple leads.

When Sales Cloud lead records are deleted or merged, these changes are not synchronized to Oracle Marketing Cloud.

**Synchronization of Opportunity Data**

An opportunity in Oracle Sales Cloud is synchronized to Oracle Marketing Cloud where it is either associated to a contact, or associated to a contact through an account. The Sales opportunity is not visible in Oracle Marketing until the contact linked to the opportunity makes a response to a marketing campaign, for example, submits a form. The opportunity can then be viewed, but not edited, in the Opportunity Search screen.

Sales opportunities are matched in Oracle Marketing using the Opportunity ID field.

In Oracle Marketing Cloud, you must define opportunity stages to match those used in Oracle Sales Cloud.

**About Synchronizing Lead and Contact Data to Sales Cloud from Marketing Cloud**

This process uses contact data in Oracle Marketing Cloud to update contacts and generate leads in Oracle Sales Cloud. A Sales lead is created for new prospects captured in Oracle Marketing Cloud and for responses from existing contacts to a campaign or other marketing event. The data synchronization flow to Oracle Sales Cloud is shown in the following figure.

**Detailed Synchronization Process**

The integration uses Oracle Eloqua Program Builder functionality to specify the business process logic that is used to synchronize data with Oracle Sales Cloud.

Synchronization to Oracle Sales Cloud is event based, that is, data is synchronized when an event occurs in Oracle Marketing Cloud, thereby triggering a synchronization action to occur. For example, when a form is submitted by a contact in response
to a campaign (the event), rules defined in the form add the contact’s details to the relevant Program Builder program, which in turn executes the logic defined in the program, such as running an external call to create a lead in Oracle Sales Cloud.

External calls defined for the Program Builder program you create also determine how fields are mapped for an object, which fields are synchronized for each object, and the synchronization schedule. For information on creating the Program Builder program and external calls, see the chapter Configuring Data Synchronization from Marketing Cloud to Sales Cloud.

Oracle Eloqua maintains the relationship between Sales Cloud records and its own records using the Sales Cloud record identifier (CRM ID). The CRM ID of each item successfully synchronized from Oracle Sales Cloud is retained on the corresponding record created or updated in Oracle Marketing Cloud. On subsequent synchronization cycles, the logic defined in the Program Builder program checks whether or not a record in Oracle Marketing Cloud has a CRM ID and synchronizes data as described in the following topics.

### Synchronization of Contact Data

Contacts are synchronized to Oracle Sales Cloud as follows:

- If the contact record in Oracle Marketing Cloud has a Contact CRM ID, then the mapped fields of the associated contact in Oracle Sales Cloud are updated and, if a new lead is created, it references the contact.
- If the contact in Oracle Marketing Cloud does not have a Contact CRM ID or a Lead CRM ID, then a lead is created in Oracle Sales Cloud but a contact record is not created. A contact and account record can be manually added for the lead.

### Synchronization of Account Data

Existing accounts in Oracle Sales Cloud are not updated during the data synchronization process from Oracle Marketing Cloud.

### Synchronization of Lead Data

A lead is created in Oracle Sales Cloud for:

- New prospects captured in Oracle Marketing Cloud, for example, list uploads from a trade show
- Responses from existing contacts, for example, when a contact submits a form as a result of an email campaign

The integration provides three different Program Builder templates that you can choose from, depending on the lead synchronization logic you want to implement. The templates are as follows:

- Point of Interest. A new lead is created in Oracle Sales Cloud for all new prospects or response generated in Oracle Marketing Cloud. Existing lead records in Oracle Sales Cloud are not updated; instead, multiple leads can be created for a contact.
- Create Unique. A new lead is created in Oracle Sales Cloud only if there is no contact or lead record with the same email address in Oracle Sales Cloud. Existing lead records in Oracle Sales Cloud are updated.
- Hybrid. A new lead is created in Oracle Sales Cloud only if there is no unconverted lead record with the same email address in Oracle Sales Cloud. Existing unconverted lead records in Oracle Sales Cloud are updated.

For additional information on the templates, see the chapter Configuring Data Synchronization from Marketing Cloud to Sales Cloud.
Assignment of Generated Leads

Leads that are generated in Oracle Sales Cloud by the integration can be assigned using territory assignment or rule-based assignment.

Rule-based assignment requires that rules are created manually in Oracle Sales Cloud. For example, you can create a lead assignment rule to route all leads with a Status of Unqualified to an inside sales team.

With territory-based assignment, a lead is routed automatically to a territory provided that the new lead is associated with an account and contact record in Oracle Sales Cloud that includes address information. Leads generated for net new prospects in Oracle Sales Cloud do not have an associated account and contact record and so cannot be assigned using territory definitions.

Configuration Roadmap

To use this integration, application artifacts must be configured in both Oracle Marketing Cloud and Oracle Sales Cloud.

- **Oracle Marketing Cloud**
  
  In the Oracle Marketing Cloud instance, you must create a Lead custom object, Auto Synch functionality must be configured, and the business process logic used in the integration must be defined and implemented using Program Builder. You can also choose to configure closed-loop reporting functionality.

- **Oracle Sales Cloud**
  
  In the Oracle Sales Cloud instance, you can optionally configure access from the Sales Cloud UI to digital data in Oracle Marketing Cloud.
Integration Assumptions and Constraints

Before implementing the Oracle Sales Cloud to Oracle Marketing Cloud integration, note the following assumptions and constraints:

- Not all fields visible on the Oracle Sales Cloud Contact, Account and Lead objects are available in the integration. Check the fields that are available before finalizing field mapping.
- Fields that allow multiple selections are not supported by default in this release of the integration. However, you can use Oracle Cloud extensibility tools to enable this functionality.
- When Sales Cloud contact and lead records are merged or deleted, these changes are not synchronized to Oracle Marketing Cloud. Merged or deleted account records are synchronized to Oracle Marketing Cloud.
- The integration supports the synchronization of custom fields defined for standard objects.
2 Oracle Marketing Cloud: Preliminary Configuration

Overview

This chapter details the preliminary tasks you must perform in Oracle Marketing Cloud before you can configure data synchronization for the integration.

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

Software Requirements for Oracle Marketing Cloud

The integration is supported on all Oracle Eloqua Marketing Cloud implementations.

For the list of supported Web browsers for Oracle Eloqua Marketing Cloud, see the Certifications tab on My Oracle Support.

Prerequisite Tasks for Configuring Oracle Marketing Cloud

Before you can configure your Oracle Marketing Cloud environment to prepare it for the integration, carry out the following prerequisite tasks.

1. Verify that the integration is enabled.

   If the integration was not enabled when your Oracle Eloqua instance was provisioned, create a service request (SR) on My Oracle Support to request this feature. Alternatively, you can phone Oracle Global Customer Support directly.

2. If you want to use the Digital Profile functionality to display digital activity data for contacts in Oracle Sales Cloud, the Dhttps and JSSE settings must be enabled in your Sales environment. Starting in Release 12, these settings are enabled by default. If you are using an earlier version of Oracle Sales Cloud, you must create an SR on My Oracle Support to request that the Dhttps and JSSE settings are enabled.

   For additional information about the digital profiler, see the topic Configuring Access to the Digital Profile Infolet.

3. Run the integration startup wizard as described in Running the CRM Integration Setup Wizard.

   Before running the wizard, identify the user ID and password required to connect to Oracle Sales Cloud.

Related Topics

- Configuring Access to the Digital Profile Infolet: Procedure
Running the CRM Integration Setup Wizard

Before you can complete any of the integration configuration tasks in Oracle Eloqua, you must first run the CRM Integration Setup wizard. Running the wizard allows you to setup and verify the connection to Oracle Sales Cloud, and enables the import of data from Oracle Sales Cloud. The following procedure describes how to run the wizard.

1. Log in to Oracle Eloqua Marketing Cloud with administrator privileges.
2. In the navigation bar at the top of the application window, select Settings > Setup > Integration.

Provided that the CRM Integration Setup wizard has not been run previously, the CRM Integration Setup window is displayed.

3. In the CRM Account Information area, enter the following connection information:
   - The URL of your Oracle Sales Cloud instance. The URL must be in the following format:
     https://<instance_name>.crm.<location>.oraclecloud.com
     where <instance_name> is the name of your Sales Cloud instance and <location> varies according to your location. The URL must include the letters crm.
   - The user name and password used to connect to Oracle Sales Cloud.

4. In the Error Notification area, enter the email address to which error notifications are sent if an error occurs during communications with Oracle Sales Cloud.
   You can change the email address at a later time, if necessary, as follows:
   - From the navigation bar at the top of the application window, select Settings > Setup > Integration.
   - Select the Configuration tab, and then select Error Notifications, Manage Error Notifications.

5. Click Start CRM Integration.

The wizard runs processes to verify the Sales Cloud login, and to enable the integration with Oracle Sales Cloud. Once the wizard completes successfully, the integration is started.

6. Disable the auto synchs enabled by the CRM Integration Setup wizard so that they do not run until you have completed the auto sync configuration for your implementation:
   - In the navigation bar at the top of the application window, select Settings > Setup > Integration.
   - Click the Inbound tab, and then select Auto Synchs from the Management menu.
   - In the Auto Synchs area, navigate to each of the following auto synchs, click the down arrow beside the auto synch, and then select the option Disable Auto Synch.
     - Get Accounts
     - Get Contacts

When you have completed the integration configuration described in this guide, enable each auto synch by selecting the Run Auto Synch option.
Creating the Lead Custom Object and Creating Custom Fields for Standard Objects

Oracle Marketing Cloud does not include a Lead object by default. In order to synchronize lead data from Oracle Sales Cloud, therefore, you must first create a Lead custom object. You might also want to create custom fields for the Account and Contact objects in Oracle Marketing Cloud. Both of these tasks are described in this topic.

**Note:** You must create the Lead custom object and custom fields for the Account and Contact objects before you perform any other Oracle Marketing Cloud configuration tasks.

Creating the Marketing Cloud Lead Custom Object

Perform the steps in the following procedure to create the Lead custom object required for the integration. You must create the Lead custom object before you create the Auto Synch functionality and external calls used to synchronize data in the integration.

1. Log in to Oracle Eloqua Marketing Cloud with administrator privileges.
2. In the navigation bar at the top of the application window, select **Contacts**, then **Custom Objects**.
3. From the Custom Object menu, click **New Custom Object**.
4. In the Custom Object area, enter values similar to those in the following table, and then click **Next**.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display Name</td>
<td>Lead</td>
</tr>
<tr>
<td>Entity Type</td>
<td>Contacts</td>
</tr>
<tr>
<td>Entity Field</td>
<td>Email Address</td>
</tr>
</tbody>
</table>

5. Create fields for the new Lead object as follows:

   a. From the Custom Object Record Fields menu on the top right of the screen, select **Add New Field**.
   b. On the Custom Object Record Field window, enter values in the fields as required, then click **Save and Close**. You must enter values for the following at a minimum:

      - Field Name
      - Data Type
      - Field Type used when editing a Custom Object Record

   For an example of the fields you might choose to create, see the topic Creating the Lead Auto Synch.

6. Click **Save and Close**, and then click **Next**.
7. In the Header Fields window, click **Next**.
8. On the Custom Object window, review the values you entered for the Lead custom object, and then click **Save**.
Creating Contact and Account Custom Fields

Custom fields created in Oracle Sales Cloud are available when you perform field mappings for the external calls used by Program Builder and Auto Synch functionality. Create equivalent custom fields in Oracle Eloqua if required, and map the custom Sales Cloud fields to them.

Note: You must create a custom field, Account Status, in Oracle Eloqua Marketing Cloud before you create the Get Deleted Account auto synch.

To create Account or Contact custom fields, perform the steps in the following procedure.

1. Log in to Oracle Eloqua Marketing Cloud with administrator privileges.
2. In the navigation bar at the top of the application window, select Settings > Setup > Fields & Views. Make sure that the Fields button in the center of the screen is highlighted.
3. Click on the add icon (+) and select Add Contact Field or Add Account Field as appropriate.
4. Enter values in the fields as required. You must enter values for the following fields:
   - Display Name
   - Data Type
   - Field Type
5. Select any options, if required.
6. Click Save.

Related Topics
- Creating the Lead Auto Synch: Procedure

Configuring Closed-Loop Reporting

The integration provides closed-loop reporting functionality which you can optionally choose to implement. Closed-loop reporting allows you to associate sales opportunity revenue with specific marketing campaigns so that you can analyze your campaign effectiveness. To use the closed-loop reporting functionality, there are additional configuration tasks you must complete, which are described in this topic.

For additional information about the closed-loop reports and dashboards that are available with the integration, see the chapter Closed-Loop Reporting Dashboards and Reports.

Note: You do not have to implement closed-loop reporting functionality. Configuring closed-loop reporting is an optional task.

To enable closed-loop reporting, perform the following tasks. Each task is described in detail in the remainder of this chapter.

1. Define campaign activities.
   For information, see the topic Configuring External Assets and Activities.
2. Define response rules.
   For information, see the topic Defining Response Rules for Campaign Activities.
3. Define opportunity stages for Oracle Marketing Cloud. For information, see the topic Defining Opportunity Stages.

4. Configure the method of attributing opportunity revenue to campaigns. For information, see the topic Configure the Default Revenue Attribution Method.

5. Configuring how opportunities are associated to contacts. For information, see the topic Configuring the Association between Imported Opportunities and Contacts.

Configuring External Assets and Activities

An external asset is an offline activity, such as attending a trade show, performed by a contact or prospect. Perform the steps in the following procedure to define the external assets and associated activities for your campaigns:

1. Log in to Oracle Eloqua Marketing Cloud with administrator privileges.
2. In the navigation bar at the top of the application window, select Settings > Setup > Assets > External Activities.
3. To add a new external asset type, click the Add icon (+) on the bottom left-hand corner of the page.
4. In the External Asset Type field, enter a name for the external asset, for example, Trade_Show.
5. To add an external activity type for the asset, click the Add icon located under the Activity Types box.
6. Enter the name of the activity, for example, Viewed a Demo, or Visited Booth.

**Note:** Activity Type names must be unique.

7. Enter the name of the corresponding external asset in the Asset Type Name field.
8. Add as many external asset types and activities as are required for your campaigns.
9. Click Save.

Perform all of the steps in the procedure for each external asset and activity type required for your campaigns.

Defining Response Rules for Campaign Activities

Perform the steps in the following procedure to configure response rules for the campaign activities you created previously.

1. In the navigation bar at the top of the application window, select Settings > Setup > Assets > Response Rules. The Default Campaign Response Rules window opens.
2. First, create the campaign member status values as follows. Member status values indicate the responses made by campaign members to an activity.
   a. Select the Manage Campaign Member Statuses option from the Advanced Options menu (top right corner of the window).
   b. For each campaign member status value you want to add, click Add, then enter the status name in both the Value and Display Name fields. Examples of status values might be Attended, or Viewed Demo.
   c. Click Close.
3. In the Default Campaign Response Rule Details section, create a response rule for each external asset response activity as follows:
   a. Click the Add Response Activity icon (+).
b. In the **Response Activity** field, select the activity for which you are creating the rule. For example, External Activity: Tradeshow Viewed a Demo.

c. In the **Oracle Sales Cloud Member Campaign Status** field, select an appropriate status value to associate with the activity, for example, Viewed Demo.

d. In the **Priority** field, indicate the priority of the activity.

e. Click **Save**.

---

### Defining Opportunity Stages

To successfully synchronize opportunities from Sales to Marketing, the stages defined for opportunities in Oracle Sales Cloud must also be created in Oracle Marketing Cloud.

Determine the opportunity stages that are used in Oracle Sales Cloud then, if necessary, create any additional opportunity stages in Oracle Marketing Cloud. If an opportunity stage is no longer required in Oracle Marketing Cloud, you can inactivate the stage. The procedures in this topic describe how to create and inactivate opportunity stages.

> **Note:** The names of the opportunity stages you create in Oracle Marketing Cloud must match exactly the opportunity stage names in Oracle Sales Cloud, including the use of spaces.

---

### Defining Opportunity Stages

Perform the steps in the following procedure to create any additional opportunity stages that you require in Oracle Marketing Cloud.

1. Log in to Oracle Eloqua Marketing Cloud with administrator privileges and navigate to **Campaigns**.
2. From the Action menu (Gear icon), select **Opportunity Settings**...
3. In the Opportunity Stage Details section, select **Add New Opportunity Stage**.
4. Create at least 2 opportunity stages:
   - A stage with a probability of closing of 100% (closed won)
   - A stage with a probability of closing of 0% (closed lost)

For each stage, enter values similar to those in the following table, and then click **Next**.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Opportunity Stage Name</td>
<td>The name of the new stage, for example, Closed Lost.</td>
</tr>
<tr>
<td>Probability of Closing</td>
<td>The probability of closing the opportunity as a percentage. For example, 0%.</td>
</tr>
</tbody>
</table>

5. Check the **Indicate Closed/Lost** box for the stage, if appropriate.
6. To define another stage, click **Save and New**. Otherwise, click **Save and Close**.

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### Inactivating Opportunity Stages

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Opportunities are managed in Oracle Sales Cloud. As a result, after you create an opportunity stage in Oracle Marketing Cloud, you cannot edit the stage name or the probability of closing value specified for the stage. You can, however, select or deselect the **Indicate Closed/Lost** check box for the stage and you can inactivate an existing stage.

Perform the steps in the following procedure to inactivate an opportunity stage.

1. Log in to Oracle Eloqua Marketing Cloud with administrator privileges and navigate to **Campaigns**.
2. From the Action menu (Gear icon), select **Opportunity Settings...**
3. In the Opportunity Stage Details section, select **Inactivate Stage** for a selected stage.

**Note:** If you set a stage to inactive, it cannot be reactivated.

4. Click **OK** when prompted to confirm that you want to inactivate the stage.

When you inactivate an opportunity stage, the stage is no longer included in the Opportunity Stages list. However, the stage data is maintained in Oracle Marketing Cloud for use in related reports.

### Configuring the Default Revenue Attribution Method

Configure the default method of attributing opportunity revenue as described in the following procedure. You must have defined opportunity stages, as described in Defining Opportunity Stages, to complete this task.

To configure the default revenue attribution method, perform the following steps.

1. Log in to Oracle Eloqua Marketing Cloud with administrator privileges and navigate to **Campaigns**.
2. From the Action menu (Gear icon), select **Opportunity Settings...**
3. In the Default Revenue Attribution Method section, click **Edit**.
4. Specify the campaign responses that you want to include in the revenue attribution. It is recommended that you choose the option **All Campaign Responses from Lead Creation in Eloqua to Opportunity Close in CRM**.
5. Specify the method you want to use to attribute opportunity revenue across campaigns.
6. Click **Save and Close**, then **Save**.

### Configuring the Association between Imported Opportunities and Contacts

When an opportunity is synchronized to Oracle Marketing Cloud, it can either be associated to a contact directly, or associated to a contact through an account. This topic describes how to specify the method of associating opportunities to contacts that you want to use in the integration; only one method can be selected.

To configure the association between opportunities and contacts, perform the following steps.

1. Log in to Oracle Eloqua Marketing Cloud with administrator privileges and navigate to **Campaigns**.
2. From the Action menu (Gear icon), select **Opportunity Settings...**
3. In the Contact to Opportunity Association section, click **Edit**.
4. Under the heading **Association of Opportunities to Campaigns Using Contacts**, specify how you want imported opportunities to be associated with contacts.
The value that you select determines which of the link opportunity auto synchs you must create. For information, see the topic Creating Auto Synchs for the Opportunity Object.

5. Click **Save and Close**, then **Save**.

**Related Topics**

- Creating Auto Synchs for the Opportunity Object: Explained
Chapter 3
Configuring Data Synchronization from Sales Cloud to Marketing Cloud

About Setting Up Data Synchronization from Sales Cloud

This chapter details the steps required to configure Oracle Marketing Cloud to enable data synchronization from Oracle Sales Cloud to Oracle Marketing Cloud.

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 described in this chapter.

Oracle Eloqua Auto-Synch Functionality

The integration uses Oracle Eloqua Auto-Synch functionality to provide scheduled imports of Oracle Sales Cloud data. An auto synch must exist for each type of data that is synchronized from Oracle Sales Cloud. The auto synch defines the import schedule, the fields to synchronize, and the actions that Oracle Eloqua performs when the data is imported.

The integration provides auto synchs for importing account and contact data which you can review and change if required. As part of the integration configuration, you must also create additional auto synchs and verify auto synch processing.

Auto Synch Configuration Tasks

To synchronize data from Oracle Sales Cloud to Oracle Marketing Cloud, you perform the following tasks:

- Review the auto synchs provided to import account and contact data and amend them if required.
  
  For information, see the topic Reviewing the Predefined Account and Contact Auto Synchs.

- Create an auto synch to import lead data. If you are using the Program Manager Hybrid template, you must also create two additional auto synchs so that the status of imported leads (converted or unconverted) can be tracked on the associated Oracle Eloqua contact records.

  Lead objects do not exist in Oracle Eloqua Marketing Cloud so create a custom Lead object before creating the Lead auto synch. For information, see the topic Creating Auto Synchs for the Lead Object.

- Create an auto synch to import opportunity data. You must also create a second opportunity auto synch to link the imported opportunity to either a contact or an account in Oracle Marketing Cloud.

  For information, see the topic Creating Auto Synchs for the Opportunity Object.

- The integration provides an auto synch to import account data. However, you must create an additional auto synch to import deleted or merged account records from Oracle Sales Cloud.

  For information, see the topic Creating the Get Deleted Account Auto Synch.

- Verify that the priority levels assigned to Sales Cloud data during the import process are correct.
Reviewing the Predefined Account and Contact Auto Synchs

Perform the steps in the following procedure to review the auto synchs defined in the integration for account and contact data, and to update the auto synchs if required. The values specified for each auto synch determine what fields are synchronized from Oracle Sales Cloud and how often they are synchronized.

1. Log in to Oracle Eloqua Marketing Cloud with administrator privileges.
2. In the navigation bar at the top of the application window, select Settings > Setup > Integration.
3. Click the Inbound tab,
4. From the Management menu, select Auto Synchs.
All the existing auto synchs are listed.
5. Navigate to either the Account or Contact auto synch and select Auto Synch Details from the drop-down menu.
6. Review the information in each of the sections shown by clicking the down arrow. Amend the information by clicking the Edit button.
The information you can update is described in the following sections.

Auto Synch Details

Edit the Auto Synch Details if, for example, you want to change the email address to which success or failure notifications are sent.

Verify that the Enabled check box is selected.

Transfer Values

The Transfer Values section displays information relating to the external call used by the auto sync. To edit this information, perform the following steps:

1. Click the Edit icon in the Transfer Values section.
2. The default transfer values are displayed. Click the Edit icon again.
3. Specify values for the external call fields which are shown in the following table.

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>External Call Name</td>
<td>Get Accounts or Get Contacts</td>
</tr>
<tr>
<td>External Call Description</td>
<td>Change the description if required.</td>
</tr>
<tr>
<td>External User</td>
<td>If you have multiple users set up, make sure the correct user is selected.</td>
</tr>
</tbody>
</table>
The Action and Entity values specified for the auto synch are displayed but cannot be changed.

4. From the Options menu in the top right corner, click View Field Selection. All the fields currently selected for synchronization from Oracle Sales Cloud are displayed. You can add additional fields or remove fields as required.
   - Account auto sync: Map the Organization ID field at a minimum.
   - Contact auto sync: Map the Email field at a minimum.

5. From the Options menu, select View Filter Details to modify the filter values for the auto synch. In the Filter Type area, verify that:
   a. The value of the Oracle Sales Cloud Account Fields or Oracle Sales Cloud Contact Fields field is set to Last Updated At.
   b. The Operator field is set to Greater Than or Equal.
   c. The Expression field is set to Last Successful Upload.

Field Mapping
The field mapping values specify how fields in Oracle Sales Cloud are mapped to fields in Oracle Marketing Cloud. Review the following values:

- The values of the Uniquely Match On field must be set as follows:
  - Account auto sync. Leave the value as Oracle Fusion Account ID.
  - Contact auto sync. Leave the value as Email Address.

- Field Mappings
  Map the source fields in Oracle Sales Cloud to the target fields in Oracle Marketing Cloud.
  - Account field mappings. The following table shows how Oracle Sales Cloud account fields are mapped to Oracle Marketing Cloud fields by default.

<table>
<thead>
<tr>
<th>Sales Cloud Account Fields</th>
<th>Marketing Cloud Fields</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organization ID</td>
<td>Oracle Fusion Account ID</td>
</tr>
<tr>
<td>Organization Name</td>
<td>Account Name</td>
</tr>
<tr>
<td>Address Line 1</td>
<td>Address 1</td>
</tr>
<tr>
<td>Address Line 2</td>
<td>Address 2</td>
</tr>
<tr>
<td>Address Line 3</td>
<td>Address 3</td>
</tr>
</tbody>
</table>

Note: This field is used by the integration. Do not change the default mapping.
### Contact field mappings.

The following table shows how Oracle Sales Cloud contact fields are mapped to Oracle Marketing Cloud fields by default.

<table>
<thead>
<tr>
<th>Sales Cloud Contact Fields</th>
<th>Marketing Cloud Fields</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account ID</td>
<td>Oracle Fusion Account ID</td>
</tr>
<tr>
<td>Address Line 1</td>
<td>Address 1</td>
</tr>
<tr>
<td>Address Line 2</td>
<td>Address 2</td>
</tr>
<tr>
<td>Address Line 3</td>
<td>Address 3</td>
</tr>
<tr>
<td>Business Phone</td>
<td>Business Phone</td>
</tr>
<tr>
<td>Contact ID</td>
<td>Oracle Fusion Contact ID</td>
</tr>
<tr>
<td>Email</td>
<td>Email Address</td>
</tr>
<tr>
<td>Do Not Email</td>
<td>Email Opt Out</td>
</tr>
<tr>
<td>First Name</td>
<td>First Name</td>
</tr>
<tr>
<td>Last Name</td>
<td>Last Name</td>
</tr>
<tr>
<td>City</td>
<td>City</td>
</tr>
<tr>
<td>Country</td>
<td>Country</td>
</tr>
<tr>
<td>State</td>
<td>State</td>
</tr>
</tbody>
</table>

**Note:** This field is used by the integration. Do not change this default mapping.
Chapter 3
Configuring Data Synchronization from Sales Cloud to Marketing Cloud

<table>
<thead>
<tr>
<th>Sales Cloud Contact Fields</th>
<th>Marketing Cloud Fields</th>
</tr>
</thead>
<tbody>
<tr>
<td>Province</td>
<td>Province</td>
</tr>
<tr>
<td>Postal Code</td>
<td>Zip or Postal Code</td>
</tr>
<tr>
<td>Mobile Phone</td>
<td>Mobile Phone</td>
</tr>
<tr>
<td>Salutation</td>
<td>Salutation</td>
</tr>
<tr>
<td>Job Title</td>
<td>Title</td>
</tr>
</tbody>
</table>

Upload Actions
Do not change the values for upload actions.

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**. Select 2 hours. You can optionally 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, and the start and end times to run the auto synch, and then click **Finish**.

Creating Auto Synchs for the Lead Object

About Creating the Lead Auto Synchs

To import lead data from Oracle Sales Cloud to Oracle Eloqua Marketing Cloud, you must create the following auto synchs:

- An auto synch to import lead data from Oracle Sales Cloud to the Lead custom object in Oracle Eloqua Marketing Cloud.
  For information, see the topic Creating the Lead Auto Synch.
- If you are using the Program Manager Hybrid template, you must also create two additional auto synchs to import lead data to the Contact object in Oracle Eloqua Marketing Cloud: one auto synch for leads that have been converted to opportunities, and one for unconverted leads. For information, see the topics:
  - Creating the Get Unconverted Lead Auto Synch
  - Creating the Get Converted Lead Auto Synch
Related Topics

- Creating the Lead Custom Object and Creating Custom Fields for Standard Objects: Procedure

Creating the Lead Auto Synch

This topic describes how to create an auto synch that imports lead data from Oracle Sales Cloud to the Lead custom object in Oracle Eloqua Marketing Cloud.

To create the Lead auto synch, perform the steps in the following procedure.

1. Log in to Oracle Eloqua Marketing Cloud with administrator privileges.
2. In the navigation bar at the top of the application window, select Settings > Setup > Integration.
3. Click the Inbound tab.
4. On the Create Data Sources menu, select Create Data Source with External Call.

    The External Call wizard starts.

   In the External Call wizard, enter the information for each step as described, then click Next to proceed to the following step.

Step 1 - External Call Details

Enter details about the external call used by the auto synch.

1. Enter details for the external call in the fields shown in the following table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>External Call Name</td>
<td>Get Leads</td>
</tr>
<tr>
<td>Save in Folder</td>
<td>Retrieve Data</td>
</tr>
<tr>
<td>External User</td>
<td>If you have multiple users set up, make sure you are using the correct one.</td>
</tr>
<tr>
<td>Data Type</td>
<td>Data Card</td>
</tr>
<tr>
<td>Custom Object</td>
<td>Lead</td>
</tr>
<tr>
<td>Purpose of Upload</td>
<td>Add these data cards to the database.</td>
</tr>
<tr>
<td>Priority</td>
<td>Get CRM Leads</td>
</tr>
</tbody>
</table>

2. Select the Can Be Scheduled for Automatic Execution check box.
Step 2 - Source Details
Specify details for the data source in the fields shown in the following table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action</td>
<td>Retrieve</td>
</tr>
<tr>
<td>Entity</td>
<td>Lead (Lead)</td>
</tr>
</tbody>
</table>

Step 3 - Field Selection
Check all the lead fields you want to synchronize from Oracle Sales Cloud. You must select Email Address and Lead ID as a minimum.

Step 4 - Filter Details
Specify how you want to filter the data that is imported from Oracle Sales Cloud.

1. In the Oracle Sales Cloud Lead Fields column, select the value Last Updated At.
2. In the Operator column, select the value Greater Than or Equal.
3. In the Expression column, click the arrow beside the text box and select Add Date.
4. In the Add Date window, select the option Use the start date of the last successful upload, then click Save and Close.
5. Click Save.

Step 5 - Field Mapping
Specify how lead-related fields in Oracle Sales Cloud are mapped to fields in Oracle Marketing Cloud.

1. In the Unique Match area, enter the values shown for the fields in the following table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Data Card Field</td>
<td>Oracle Sales Cloud ID</td>
</tr>
<tr>
<td>Unique Identifier Provided by Eloqua</td>
<td>Oracle Sales Cloud Lead ID</td>
</tr>
</tbody>
</table>

2. In the Field Mappings area, map source lead fields in Oracle Sales Cloud to target lead fields in Oracle Marketing Cloud. Create custom fields for the Lead custom object in Oracle Marketing Cloud for any fields you want to map. The following table shows the recommended mapping for lead fields.

<table>
<thead>
<tr>
<th>Sales Cloud Lead Fields</th>
<th>Marketing Cloud Lead Fields</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address 1</td>
<td>Address 1</td>
</tr>
<tr>
<td>Address 2</td>
<td>Address 2</td>
</tr>
<tr>
<td>Address 3</td>
<td>Address 3</td>
</tr>
</tbody>
</table>
## Configuring Data Synchronization from Sales Cloud to Marketing Cloud

<table>
<thead>
<tr>
<th>Sales Cloud Lead Fields</th>
<th>Marketing Cloud Lead Fields</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assignment Status Code</td>
<td>Assignment Status Code</td>
</tr>
<tr>
<td>Budget Status</td>
<td>Budget Status</td>
</tr>
<tr>
<td>Channel Type</td>
<td>Channel Type</td>
</tr>
<tr>
<td>City</td>
<td>City</td>
</tr>
<tr>
<td>Country</td>
<td>Country</td>
</tr>
<tr>
<td>Customer Id</td>
<td>Oracle Fusion Account Id</td>
</tr>
<tr>
<td>Lead Id</td>
<td>Oracle Sales Cloud Lead Id</td>
</tr>
<tr>
<td>Lead Name</td>
<td>Lead Name</td>
</tr>
<tr>
<td>Postal Code</td>
<td>Postal Code</td>
</tr>
<tr>
<td>Email Address</td>
<td>Email Address</td>
</tr>
<tr>
<td>Primary Contact ID</td>
<td>Oracle Sales Cloud Contact ID</td>
</tr>
<tr>
<td>First Name</td>
<td>First Name</td>
</tr>
<tr>
<td>Last Name</td>
<td>Last Name</td>
</tr>
<tr>
<td>Province</td>
<td>Province</td>
</tr>
<tr>
<td>Rank</td>
<td>Rank</td>
</tr>
<tr>
<td>Sales Channel</td>
<td>Sales Channel</td>
</tr>
<tr>
<td>State</td>
<td>State</td>
</tr>
<tr>
<td>Status Code</td>
<td>Status Code</td>
</tr>
<tr>
<td>Company Name</td>
<td>Company Name</td>
</tr>
<tr>
<td>Lead Source</td>
<td>Lead Source</td>
</tr>
</tbody>
</table>
Step 6 - Upload Actions

Specify the upload actions as follows.

1. In the Validate Email Address area, deselect the check box **Validate that the email address exists and the format is correct.**
2. In the Import Data Cards area:
   - Verify that the value of the **Data Card Set** field is **Sales Cloud Leads**.
   - Select the **Map data cards** check box.
   - Set **Entity Type** to **Contacts**.
   - Set **Entity Field** to **Email Address**.
   - Set **Source Field** to **Email**.
   - Do not select the **Case sensitive match** check box.

Step 7 - Summary

The Summary screen displays a summary of the settings that are used by the auto synch to synchronize lead data from Oracle Sales Cloud.

You also specify scheduling information for the auto synch. Perform the following steps.

1. In the Notification Email area, enter the email address where the auto synch success or failure notification is sent.
2. In the After Uploading area, select the **Schedule automatic data imports using these settings** check box.
3. In the Auto-Synch Schedule area, 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**. Select **2 hours**. You can optionally 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, and the start and end times to run the auto synch.
4. Click **Finish**.

Creating the Get Unconverted Lead Auto Synch

If you are using the Program Manager Hybrid template, you must create an auto synch that synchronizes data for unconverted leads in Oracle Sales Cloud (for example, leads with a status of Qualified, Unqualified, or Retired) to the associated Oracle Eloqua contact records. Data synchronized to the contact record includes the Lead CRM ID of the record.

Perform the steps in the following procedure to create the Get Unconverted Lead auto synch.

1. Log in to Oracle Eloqua Marketing Cloud with administrator privileges.
2. If a shared list for unconverted leads does not already exist, create it as follows:
   a. In the navigation bar at the top of the application window, select **Contacts > Shared Library**.
   b. Select **Shared Lists** in the left navigation bar.
   c. Click the **New** button.
   d. In the Add New Shared List dialog box, click the Action menu (Gear icon), then select **Settings**.
   e. In the **Name** field, enter the value **Oracle Sales Cloud Leads**.
   f. Click **Done**, then click **Save**.
3. To create the auto synch, in the navigation bar at the top of the application window, select **Settings > Setup > Integration**.

4. Click the Inbound tab.

5. On the Create Data Sources menu, select **Create Data Source with External Call**.

The External Call wizard starts.

In the External Call wizard, enter the information for each step as described, then click **Next** to proceed to the following step.

### Step 1 - External Call Details

Enter details about the external call used by the auto synch.

1. Specify values for the external call fields shown in the following table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>External Call Name</td>
<td>Get Un-Converted Leads</td>
</tr>
<tr>
<td>Save in Folder</td>
<td>Retrieve Data</td>
</tr>
<tr>
<td>External User</td>
<td>If you have multiple users set up, make sure you are using the correct one.</td>
</tr>
<tr>
<td>Data Type (For Import)</td>
<td>Contact</td>
</tr>
<tr>
<td>Purpose of Upload</td>
<td>Add these contacts to the database.</td>
</tr>
<tr>
<td>Priority</td>
<td>CRM Leads</td>
</tr>
</tbody>
</table>

2. Select the **Can Be Scheduled for Automatic Execution** check box.

### Step 2 - Source Details

Specify details for the data source in the fields shown in the following table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action</td>
<td>Retrieve</td>
</tr>
<tr>
<td>Entity</td>
<td>Contact</td>
</tr>
</tbody>
</table>

### Step 3 - Field Selection

Check all the lead fields you want to synchronize from Oracle Sales Cloud. You must select **Email Address** and **Oracle Sales Lead ID** as a minimum.
Step 4 - Filter Details
Specify how you want to filter the data that is imported from Oracle Sales Cloud. Specify two filters as follows.

- First Row.
  a. In the Oracle Sales Cloud Lead Fields column, select the value Last Updated At.
  b. In the Operator column, select the value Greater Than or Equal.
  c. In the Expression column, click the arrow beside the text box and select Add Date.
  d. In the Add Date window, select the option Use the start date of the last successful upload, then click Save and Close.

- Second Row.
  a. In the Oracle Sales Cloud Lead Fields column, select the value Status Code.
  b. In the Operator column, select the value Not Equal To.
  c. In the Expression column, enter the value Converted.
  d. Click Save.

Step 5 - Field Mapping
Specify how lead-related fields in Oracle Sales Cloud are mapped to fields in Oracle Marketing Cloud.

1. In the Unique Match area, for the field Uniquely Match On Eloqua Contact Field, enter the value Email Address.
2. In the Field Mappings area, map the source lead fields you previously selected for synchronization to the target fields in Oracle Marketing Cloud.

You must map the lead fields shown in the following table at a minimum.

<table>
<thead>
<tr>
<th>Sales Cloud Lead Fields</th>
<th>Marketing Cloud Lead Fields</th>
</tr>
</thead>
<tbody>
<tr>
<td>EmailAddress_c</td>
<td>Email Address</td>
</tr>
<tr>
<td>Lead ID</td>
<td>Oracle Sales Cloud Lead ID</td>
</tr>
</tbody>
</table>

Step 6 - Upload Actions
In the Add to Contact Group area, select the shared list Oracle Sales Cloud Leads.

Step 7 - Summary
The Summary screen displays a summary of the settings that are used by the auto synch to synchronize lead data from Oracle Sales Cloud. You also specify scheduling information for the auto synch.

Perform the following steps.

1. In the Notification Email area, enter the email address where the auto synch success or failure notification is sent.
2. In the After Uploading area, select the Schedule automatic data imports using these settings check box.
3. In the Auto-Synch Schedule area, specify the day and time when the auto synch is to run.
4. Click Finish.
Creating the Get Converted Lead Auto Synch

If you are using the Program Manager Hybrid template, you must create an auto synch that synchronizes information for leads with a status of converted to the associated Oracle Eloqua contact records. When a converted lead is imported into Oracle Eloqua, the CRM Lead ID is removed from the Oracle Eloqua contact record, thereby allowing a new lead to be created for the contact in future.

Perform the steps in the following procedure to create the Get Converted Lead auto synch.

1. Log in to Oracle Eloqua Marketing Cloud with administrator privileges.
2. If a shared list for converted leads does not already exist, create it as follows:
   a. In the navigation bar at the top of the application window, select Contacts > Shared Library.
   b. Select Shared Lists in the left navigation bar.
   c. Click the New button.
   d. In the Add New Shared List dialog box, click the Action menu (Gear icon), then select Settings.
   e. In the Name field, enter the value Oracle Sales Cloud Converted Leads.
   f. Click Done, then click Save.
3. To create the auto synch, in the navigation bar at the top of the application window, select Settings > Setup > Integration.
4. Click the Inbound tab.
5. On the Create Data Sources menu, select Create Data Source with External Call.

The External Call wizard starts.

In the External Call wizard, enter the information for each step as described, then click Next to proceed to the following step.

**Step 1 - External Call Details**

Enter details about the external call used by the auto synch.

1. Specify values for the external call fields which are shown in the following table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>External Call Name</td>
<td>Get Converted Leads</td>
</tr>
<tr>
<td>Save in Folder</td>
<td>Retrieve Data</td>
</tr>
<tr>
<td>External User</td>
<td>If you have multiple users set up, make sure you are using the correct one.</td>
</tr>
<tr>
<td>Data Type (For Import)</td>
<td>Contact</td>
</tr>
<tr>
<td>Purpose of Upload</td>
<td>Add these contacts to the database.</td>
</tr>
<tr>
<td>Priority</td>
<td>CRM Leads</td>
</tr>
</tbody>
</table>

2. Select the **Can Be Scheduled for Automatic Execution** check box.
Step 2 - Source Details
Specify details for the data source in the fields shown in the following table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action</td>
<td>Retrieve</td>
</tr>
<tr>
<td>Entity</td>
<td>Contact</td>
</tr>
</tbody>
</table>

Step 3 - Field Selection
Check all the lead fields you want to synchronize from Oracle Sales Cloud. You must select Email Address_c and Lead ID as a minimum.

Step 4 - Filter Details
Specify how you want to filter the data that is imported from Oracle Sales Cloud. Specify two filters as follows.

- First Row.
  - a. In the Oracle Sales Cloud Lead Fields column, select the value Last Updated At.
  - b. In the Operator column, select the value Greater Than or Equal.
  - c. In the Expression column, click the arrow beside the text box and select Add Date.
  - d. In the Add Date window, select the option Use the start date of the last successful upload, then click Save and Close.

- Second Row.
  - a. In the Oracle Sales Cloud Lead Fields column, select the value Status Code.
  - b. In the Operator column, select the value Equals.
  - c. In the Expression column, enter the value Converted.
  - d. Click Save.

Step 5 - Field Mapping
Specify how lead-related fields in Oracle Sales Cloud are mapped to fields in Oracle Marketing Cloud.

1. In the Unique Match area, for the field Uniquely Match On Eloqua Contact Field, enter the value Oracle Sales Cloud Lead ID.
2. In the Field Mappings area, map the source lead fields you previously selected for synchronization to the target fields in Oracle Marketing Cloud.

You must map the lead fields shown in the following table at a minimum.

<table>
<thead>
<tr>
<th>Sales Cloud Lead Fields</th>
<th>Marketing Cloud Lead Fields</th>
</tr>
</thead>
<tbody>
<tr>
<td>EmailAddress_c</td>
<td>Email Address</td>
</tr>
<tr>
<td>Lead ID</td>
<td>Oracle Sales Cloud Lead ID</td>
</tr>
</tbody>
</table>
3. Click Advanced Options.
4. In the Update Records With a Set Value area, select Oracle Sales Cloud Lead ID in the Field column, then click Add Set Value. Leave the Set to Value field blank.

Step 6 - Upload Actions

In the Add to Contact Group area, select the shared list Oracle Sales Cloud Converted Leads.

Step 7 - Summary

The Summary screen displays a summary of the settings that are used by the auto synch to synchronize converted lead data from Oracle Sales Cloud. You also specify scheduling information for the auto synch.

Perform the following steps.

1. In the Notification Email area, enter the email address where the auto synch success or failure notification is sent.
2. In the After Uploading area, select the Schedule automatic data imports using these settings check box.
3. In the Auto-Synch Schedule area, specify the day and time when the auto synch is to run.
4. Click Finish.

Creating Auto Synchs for the Opportunity Object

About Creating the Opportunity Auto Synchs

To import opportunity data to Oracle Marketing Cloud, you must create two auto synchs:

- An auto synch to import opportunity data.
  
  For information, see Creating the Get Opportunities Auto Synch.

- An auto synch to link imported opportunities to contacts.
  
  You can choose to link opportunities to contacts directly, or you can link opportunities to contacts through accounts. However, you can only choose one method of linking opportunities, which is applied to all opportunities that are imported by the integration. Depending on the linking method you prefer, create one of the following auto synchs:

  o To link opportunities to contacts directly, see Creating the Get Opportunities and Link to Primary Contact Auto Synch
  
  o To link opportunities to contacts through accounts, see Creating the Get Opportunities and Link to Accounts Auto Synch.

The procedures in the following topics describe how to create all three opportunity auto synchs.

> **Note:** Define required opportunity stages in Oracle Marketing Cloud before creating the opportunity auto synchs. For information, see the topic Defining Opportunity Stages.

**Related Topics**

- Defining Opportunity Stages: Procedure
Creating the Get Opportunities Auto Synch

This topic describes how to create an auto synch that imports opportunity data from Oracle Sales Cloud to Oracle Marketing Cloud.

Note: You cannot delete opportunities from the Oracle Marketing Cloud user interface (UI) so test the Get Opportunities auto synch thoroughly before enabling opportunity data import.

Perform the steps in the following procedure to create the Get Opportunities auto synch.

1. Log in to Oracle Eloqua Marketing Cloud with administrator privileges.
2. In the navigation bar at the top of the application window, select Settings > Setup > Integration.
3. Click the Inbound tab.
4. On the Create Data Sources menu, select Create Data Source with External Call.

The External Call wizard starts.

In the External Call wizard, enter the information for each step as described, then click Next to proceed to the following step.

Step 1 - External Call Details
Enter details about the external call used by the auto synch.

1. Specify values for the external call fields which are shown in the following table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>External Call Name</td>
<td>Get Opportunities</td>
</tr>
<tr>
<td>Save in Folder</td>
<td>Retrieve Data</td>
</tr>
<tr>
<td>External User</td>
<td>If you have multiple users set up, make sure you are using the correct one.</td>
</tr>
<tr>
<td>Data Type</td>
<td>Opportunity</td>
</tr>
<tr>
<td>Purpose of Upload</td>
<td>Add these opportunities to the database.</td>
</tr>
</tbody>
</table>

2. Select the Can Be Scheduled for Automatic Execution check box.

Step 2 - Source Details
Specify details for the data source fields shown in the following table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action</td>
<td>Retrieve</td>
</tr>
<tr>
<td>Entity</td>
<td>Opportunity (Opportunity)</td>
</tr>
</tbody>
</table>
Step 3 - Field Selection
Check all the fields you want to synchronize from Oracle Sales Cloud. You must select the following fields at a minimum.

- Account Name
- Actual Close Date
- Opportunity Id
- Opportunity Name
- Revenue
- Stage

Step 4 - Filter Details
Specify how you want to filter the data that is imported from Oracle Sales Cloud.

1. In the Oracle Sales Cloud Opportunity Fields column, select the value Last Update Date.
2. In the Operator column, select the value Greater Than or Equal.
3. In the Expression column, click the arrow beside the text box and select Add Date.
4. In the Add Date window, select the option Use the start date of the last successful upload, then click Save and Close.

Step 5 - Field Mapping
Specify how opportunity-related fields in Oracle Sales Cloud are mapped to fields in Oracle Marketing Cloud.

1. In the Unique Match area, in the field Eloqua Opportunity Field, select Opportunity ID. Also select the Perform a case-sensitive match check box.
2. In the Field Mappings area, map the source lead fields you previously selected for synchronization to the target fields in Oracle Marketing Cloud.

The following table shows how opportunity fields are mapped by default.

<table>
<thead>
<tr>
<th>Sales Cloud Opportunity Fields</th>
<th>Marketing Cloud Opportunity Fields</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account Name</td>
<td>Account Name</td>
</tr>
<tr>
<td>Actual Close Date</td>
<td>Close Date</td>
</tr>
<tr>
<td>Opportunity Id</td>
<td>Opportunity ID</td>
</tr>
<tr>
<td>Opportunity Name</td>
<td>Opportunity Name</td>
</tr>
<tr>
<td>Revenue</td>
<td>Amount</td>
</tr>
<tr>
<td>Stage</td>
<td>Stage</td>
</tr>
</tbody>
</table>

Step 6 - Summary
This screen displays a summary of the settings that are used by the auto synch to synchronize opportunity records from Oracle Sales Cloud. You also specify scheduling information for the auto synch.
Perform the following steps.

1. In the Notification Email area, enter the email address where the auto synch success or failure notification is sent.
2. In the After Uploading area, select the **Schedule automatic data imports using these settings** check box.
3. In the Auto-Synch Schedule area, 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**. Select **2** hours.
   - **Auto Synch proceeds by Standard Business Schedule**. Select **No**.
   - In the calendar, specify the day the auto synch is to run, and the start and end times to run the auto synch.
4. Click **Finish**.

### Creating the Get Opportunities and Link to Primary Contact Auto Synch

Perform the steps in the following procedure to create an auto synch to link opportunities imported from Oracle Sales Cloud to contacts in Oracle Marketing Cloud.

**Note:** You don’t have to create the Get Opportunities and Link to Primary Contact auto synch if you have created the Get Opportunities and Link to Accounts auto synch.

1. Log in to Oracle Eloqua Marketing Cloud with administrator privileges.
2. In the navigation bar at the top of the application window, select **Settings > Setup > Integration**.
3. Click the Inbound tab.
4. On the Create Data Sources menu, select **Create Data Source with External Call**.

The External Call wizard starts.

In the External Call wizard, enter the information for each step as described, then click **Next** to proceed to the following step.

#### Step 1 - External Call Details

Enter details about the external call used by the auto synch.

1. Specify values for the external call fields shown in the following table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>External Call Name</td>
<td>Link Opportunities to Contacts</td>
</tr>
<tr>
<td>Save in Folder</td>
<td>Retrieve Data</td>
</tr>
<tr>
<td>External User</td>
<td>If you have multiple users set up, make sure you are using the correct one.</td>
</tr>
<tr>
<td>Data Type</td>
<td>Opportunity</td>
</tr>
<tr>
<td>Purpose of Upload</td>
<td>Link these opportunities to contacts.</td>
</tr>
</tbody>
</table>

2. Select the **Can Be Scheduled for Automatic Execution** check box.
Step 2 - Source Details
Specify details for the data source fields shown in the following table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action</td>
<td>Retrieve</td>
</tr>
<tr>
<td>Entity</td>
<td>Opportunity Contact (OpportunityContact)</td>
</tr>
</tbody>
</table>

Step 3 - Field Selection
Check the opportunity fields you want to synchronize from Oracle Sales Cloud. Select the Contact ID (reference) field and the Opportunity Id (reference) field.

Step 4 - Filter Details
Specify how you want to filter the data that is imported from Oracle Sales Cloud.

Enter the following row in the Filter Details table.

1. In the Oracle Sales Cloud Opportunity Contact Fields column, select the value Last Update Date.
2. In the Operator column, select the value Greater Than or Equal.
3. In the Expression column, click the arrow beside the text box and select Add Date.
4. In the Add Date window, select the option Use the start date of the last successful upload, then click Save and Close.

Step 5 - Field Mapping
Specify how opportunity-related fields in Oracle Sales Cloud are mapped to fields in Oracle Marketing Cloud.

1. In the Unique Match area, specify the values shown in the following table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Eloqua Opportunity Field</td>
<td>Opportunity ID</td>
</tr>
<tr>
<td>Upload Source Field</td>
<td>Opportunity Id</td>
</tr>
</tbody>
</table>

2. Select the Perform a case-sensitive match check box.

Step 6 - Upload Actions
Specify the upload actions as follows.

1. In the Link Opportunities to Contacts area, specify the values for the upload fields shown in the following table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Source Field</td>
<td>Contact ID</td>
</tr>
<tr>
<td>Field Name</td>
<td>Oracle Sales Cloud Contact ID</td>
</tr>
</tbody>
</table>
Select the **Case-sensitive match** check box.

**Step 7 - Summary**

This screen displays a summary of the settings that are used by the auto synch to synchronize opportunity records from Oracle Sales Cloud. You also specify scheduling information for the auto synch.

Perform the following steps:

1. In the Notification Email area, enter the email address where the auto synch success or failure notification is sent.
2. In the After Uploading area, select the **Schedule automatic data imports using these settings** check box.
3. In the Auto-Synch Schedule area, specify the day and time when the auto synch is to run.
4. Click **Finish**.

### Creating the Get Opportunities and Link to Accounts Auto Synch

Perform the steps in the following procedure to create an auto synch to link opportunity data synchronized from Oracle Sales Cloud to accounts in Oracle Marketing Cloud.

**Note:** You don't have to create the Get Opportunities and Link to Accounts auto synch if you have created the Get Opportunities and Link to Primary Contact auto synch.

1. Log in to Oracle Eloqua Marketing Cloud with administrator privileges.
2. In the navigation bar at the top of the application window, select **Settings > Setup > Integration**.
3. Click the Inbound tab.
4. On the Create Data Sources menu, select **Create Data Source with External Call**.

The External Call wizard starts.

In the External Call wizard, enter the information for each step as described, then click **Next** to proceed to the following step.

**Step 1 - External Call Details**

Enter details about the external call used by the auto synch.

1. Specify values for the external call fields shown in the following table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>External Call Name</td>
<td>Link Opportunities to Accounts</td>
</tr>
<tr>
<td>Save in Folder</td>
<td>Retrieve Data</td>
</tr>
<tr>
<td>External User</td>
<td>If you have multiple users set up, make sure you are using the correct one.</td>
</tr>
<tr>
<td>Data Type</td>
<td>Opportunity</td>
</tr>
<tr>
<td>Purpose of Upload</td>
<td>Link opportunities to contacts through accounts.</td>
</tr>
</tbody>
</table>

2. Select the **Can Be Scheduled for Automatic Execution** check box.
Step 2 - Source Details
Specify details for the data source fields shown in the following table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action</td>
<td>Retrieve</td>
</tr>
<tr>
<td>Entity</td>
<td>Opportunity (Opportunity)</td>
</tr>
</tbody>
</table>

Step 3 - Field Selection
Check the opportunity fields you want to synchronize from Oracle Sales Cloud. Select the **Account ID (reference)** field and the **Opportunity Id (id)** field.

Step 4 - Filter Details
Specify how you want to filter the data that is imported from Oracle Sales Cloud by entering the following row in the Filter Details table.

1. In the Oracle Sales Cloud Opportunity Contact Fields column, select the value **Last Update Date**.
2. In the Operator column, select the value **Greater Than or Equal**.
3. In the Expression column, click the arrow beside the text box and select **Add Date**.
4. In the Add Date window, select the option **Use the start date of the last successful upload**, then click **Save and Close**.

Step 5 - Field Mapping
Specify how opportunity-related fields in Oracle Sales Cloud are mapped to fields in Oracle Marketing Cloud.

1. In the Unique Match area, specify the mapping values shown in the following table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Eloqua Opportunity Field</td>
<td>Opportunity ID</td>
</tr>
<tr>
<td>Upload Source Field</td>
<td>Opportunity: Opportunity ID</td>
</tr>
</tbody>
</table>

2. Select the **Perform a case-sensitive match** check box.

Step 6 - Upload Actions
Specify the upload actions as follows.

1. In the Link Opportunities to Contacts through Accounts area, specify values for the upload fields shown in the following table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Source Field</td>
<td>Account Id</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Field Name</td>
<td>Oracle Sales Cloud Account ID</td>
</tr>
</tbody>
</table>
2. Select the **Case-sensitive match** check box.

**Step 7 - Summary**

This screen displays a summary of the settings that are used by the auto synch to synchronize opportunity records from Oracle Sales Cloud. You also specify scheduling information for the auto synch.

Perform the following steps.

1. In the Notification Email area, enter the email address where the auto synch success or failure notification is sent.
2. In the After Uploading area, select the **Schedule automatic data imports using these settings** check box.
3. In the Auto-Synch Schedule area, specify the day and time when the auto synch is to run.
4. Click **Finish**.

**Creating the Get Deleted Account Auto Synch**

Perform the steps in the following procedure to create an auto synch to synchronize deleted account records from Oracle Sales Cloud to Oracle Marketing Cloud.

> **Note:** Before creating the Get Deleted Account auto synch, create a custom field, Account Status, in Oracle Marketing Cloud. For information on creating custom fields, see the topic Creating the Lead Custom Object and Creating Custom Fields for Standard Objects.

1. Log in to Oracle Eloqua Marketing Cloud with administrator privileges.
2. In the navigation bar at the top of the application window, select **Settings > Setup > Integration**.
3. Click the Inbound tab.
4. On the Create Data Sources menu, select **Create Data Source with External Call**.

The External Call wizard starts.

In the External Call wizard, enter the information for each step as described, then click **Next** to proceed to the following step.

**Step 1 - External Call Details**

Enter details about the external call used by the auto synch.

1. Specify values for the external call fields shown in the following table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>External Call Name</td>
<td>Get Deleted Accounts</td>
</tr>
<tr>
<td>Save in Folder</td>
<td>Retrieve Data</td>
</tr>
<tr>
<td>External User</td>
<td>If you have multiple users set up, make sure you are using the correct one.</td>
</tr>
<tr>
<td>Data Type</td>
<td>Company</td>
</tr>
</tbody>
</table>
Chapter 3
Configuring Data Synchronization from Sales Cloud to Marketing Cloud

### Step 2 - Source Details
Specify details for the data source fields shown in the following table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action</td>
<td>Retrieve</td>
</tr>
<tr>
<td>Entity</td>
<td>Account (Account)</td>
</tr>
</tbody>
</table>

### Step 3 - Field Selection
Check the account fields you want to synchronize from Oracle Sales Cloud. Select the **Organization ID** and **Status** fields.

### Step 4 - Filter Details
Enter two rows in the Filter Details table.

1. Enter the first row:
   a. In the Oracle Sales Cloud Account Fields column, select the value **Last Updated At**.
   b. In the Operator column, select the value **Greater Than or Equal**.
   c. In the Expression column, click the arrow beside the text box and select **Add Date**.
   d. In the Add Date window, select the option **Use the start date of the last successful upload**, then click **Save and Close**.

2. Enter the second row:
   a. In the Oracle Sales Cloud Account Fields column, select the value **Status**.
   b. In the Operator column, select **Equals**.
   c. In the Expression column, enter the letter **I**.

### Step 5 - Field Mapping
Specify how account-related fields in Oracle Sales Cloud are mapped to fields in Oracle Marketing Cloud.

1. In the Unique Match area, select **Oracle Sales Cloud Account ID** in the field **Eloqua Company Field**.
2. In the Field Mappings area, map the source fields in Oracle Sales Cloud to the target fields in Oracle Marketing Cloud.

The following table shows how Sales Cloud account fields are mapped to Marketing Cloud fields by default.
Sales Cloud Account Fields | Marketing Cloud Account Fields
--- | ---
Organization | Oracle Sales Cloud Account ID
Status | Account Status

Note: Account Status is a custom field. You must create this field in Oracle Marketing Cloud.

3. Click **Advanced Options**.
4. In the Update Records With a Set Value area, select **Oracle Sales Cloud Account ID** in the Field column, then click **Add Set Value**. Leave the **Set to Value** field blank.

Step 6 - Upload Actions
Specify the upload actions as follows.

1. In the Add to Company Group area, click the icon beside the **Company Group** field to add the Get Deleted Accounts group.

   The Company Group Search window is displayed.

2. Search for the company group Get Deleted Accounts, and then select the group.

   If a Get Deleted Accounts group does not already exist, create a new group by clicking the **Create New** button and entering details for the new group. The group can then be selected from the Company Group Search window.

Step 7 - Summary
This screen displays a summary of the settings that are used by the auto synch to synchronize deleted and merged account records from Oracle Sales Cloud. You also specify scheduling information for the auto synch.

Perform the following steps.

1. In the Notification Email area, enter the email address where the auto synch success or failure notification is sent.
2. In the After Uploading area, select the **Schedule automatic data imports using these settings** check box.
3. In the Auto-Synch Schedule area, 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**. Select **2 hours**.
   - **Auto Synch proceeds by Standard Business Schedule**. Select **No**.
   - In the calendar, specify the day and time the auto synch is to run.
4. Click **Finish**.

Related Topics
- Creating the Lead Custom Object and Creating Custom Fields for Standard Objects: Procedure
Reviewing Data Priority Levels for Imported Data

Priority levels are assigned to the data sources used to import data into Oracle Eloqua Marketing Cloud. The data priority level specifies the order in which Oracle Eloqua evaluates sources of data when updating fields in the database.

By default, CRM (Sales Cloud) data is assigned the highest priority level in Oracle Eloqua Marketing Cloud, and CRM contacts are assigned a higher priority level than CRM leads. For the integration, the priority order assigned to the Sales Cloud data sources is as follows, where account data sources are assigned highest priority:

1. Accounts
2. Contacts
3. Leads

To verify the priority order assigned to Sales Cloud data sources, perform the steps in the following procedure.

1. In the navigation bar at the top of the application window, select Settings > Setup > Integration.
2. Click the Inbound tab.
3. From the Management menu, select Data Priority Order.
4. Verify that the integration data sources are in the following priority order: CRM Account, CRM Contacts, CRM Leads.

Validating Auto Synch Processing

After you have completed the setup for your integration, verify that the auto synchs you have created or updated are running correctly by performing the steps in the following procedure.

1. In the navigation bar at the top of the application window, select Settings > Setup > Integration.
2. Click the Inbound tab.
3. From the Management menu, select Auto Synchs.

All the existing auto synchs are listed. A green check mark beside an auto synch indicates that it completed successfully the last time it ran.

4. To view historical processing data for an auto synch, click on the name of the auto synch in the Auto Synchs area.

The Auto Synch window is displayed.

5. From the Reporting menu on the top right of the screen, select Auto Synch History.

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

- Print the report or export it to Excel by selecting options from 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 selecting the View Upload Details option.
4 Configuring Data Synchronization from Marketing Cloud to Sales Cloud

About Setting Up Data Synchronization from Marketing Cloud

This chapter describes the tasks required to configure Oracle Eloqua Marketing Cloud to enable data synchronization from Oracle Marketing Cloud to Oracle Sales Cloud.

The integration uses Oracle Eloqua Program Builder functionality to synchronize contact data from Marketing Cloud to Sales Cloud.

Oracle Eloqua Program Builder is used to create automated marketing workflows to replace repetitive manual tasks, including data integration. For detailed information about using Program Builder, see the Oracle Eloqua documentation at http://www.oracle.com/technetwork/documentation/default-1974074.html.

To set up data synchronization from Oracle Marketing Cloud, you perform the following tasks:

1. Create the external calls that are used by Program Builder to perform the actions required by the data synchronization process, such as create leads and update contacts.

   For information, see the section Creating External Calls.

2. Create a program in Program Builder that provides the logic to synchronize contacts as leads to Oracle Sales Cloud.

   The integration includes three Program Builder templates, each of which provides a different option for lead creation in Oracle Sales Cloud. To create the Program Builder program, select the template you want to use, and then update it as appropriate for your implementation. For information on this task, see the topic Creating a Program to Generate Leads and Update Contacts in Oracle Sales Cloud.

Creating External Calls

You must create external system calls for the program you create in Program Builder to synchronize data from Oracle Marketing Cloud to Oracle Sales Cloud. External calls perform the actions defined in the program, that is, Create Lead and Update Contact.

External calls are triggered by an internal event, which is an action that can be executed through Program Builder when a marketing activity occurs. The external call specifies the internal event that triggers the call, the action that is performed, and the data that is transferred to Oracle Sales Cloud when a particular action is executed. For example, when a contact is updated in Oracle Sales Cloud, the external call updates only the fields specified in the external call itself.

You must manually create the external calls to perform the following actions:

- Update Contact. See the topic Creating the Update Contact External Call.
- Create Lead. See the topic Creating the Create Lead External Call.
Creating the Update Contact External Call

Perform the steps in the following procedure to create the Update Contact call.

1. Log in to Oracle Eloqua Marketing Cloud with administrator privileges.
2. In the navigation bar at the top of the application window, select Settings > Setup > Integration.
3. Click the Outbound tab.
4. In the All Internal Events section, navigate to Internal Events > Custom > Custom Contact Events.
5. Click the down arrow beside Custom Contact Events.
7. In the Custom Event screen, specify the name of the custom event. Enter the value Update Contact, then click Save.
8. To create the external call for the new custom event, click the down arrow beside the new Update Contact custom event in the All Internal Events section, then select Create New External Call.

The External Call wizard starts.

In the External Call wizard, enter the information for each step as described, then click Next to proceed to the following step.

Step 1 - External Call Details

Specify values for the external call fields shown in the following table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>External Call Name</td>
<td>Update Contact</td>
</tr>
<tr>
<td>Save in Folder</td>
<td>Send Data</td>
</tr>
<tr>
<td>External User</td>
<td>If you have multiple users set up, make sure you use the correct one.</td>
</tr>
<tr>
<td>Delay This Call By</td>
<td>0 hours</td>
</tr>
</tbody>
</table>

Step 2 - Target Details

Specify details for the data target fields shown in the following table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action</td>
<td>Update</td>
</tr>
<tr>
<td>Entity</td>
<td>Contact (Contact)</td>
</tr>
<tr>
<td>Field to store the Oracle Sales Cloud entity ID</td>
<td>Oracle Sales Cloud Contact ID</td>
</tr>
</tbody>
</table>
Step 3 - Field Mapping

Map the Oracle Sales Cloud contact fields to Oracle Marketing Cloud fields. To map a field, select a value from the Eloqua Fields column and move it to the appropriate row of the Field Expression column.

The following table shows the default mapping of fields for Update Contact synchronization.

<table>
<thead>
<tr>
<th>Sales Cloud Contact Fields</th>
<th>Field Expression</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contact ID</td>
<td>Oracle Fusion Contact ID</td>
</tr>
<tr>
<td>First Name</td>
<td>First Name</td>
</tr>
<tr>
<td>Mobile Phone</td>
<td>Mobile Phone</td>
</tr>
<tr>
<td>Salutation</td>
<td>Salutation</td>
</tr>
<tr>
<td>Job Title</td>
<td>Title</td>
</tr>
</tbody>
</table>

Step 4 - Event Mapping

This screen allows you to verify that the external call and event mapping is correct. Verify that the Update Contact custom event created earlier is mapped to the Update Contact external call you just created.

Step 5 - Testing

Test the external call you created as follows.

1. In the External Call Parameters section, select a contact by clicking the Search Contact icon, and then enter a search query.
2. Once you have located the appropriate record, from the drop-down menu beside the record choose Select Item, and then click OK. You return to the original screen.
3. Click Prepare for Test.
4. Click Execute Test.
5. Click Finish to complete the test. A message is displayed indicating that the external call was created.

Creating the Create Lead External Call

Perform the steps in the following procedure to create the Create Lead external call.

1. Log in to Oracle Eloqua Marketing Cloud with administrator privileges.
2. In the navigation bar at the top of the application window, select Settings > Setup > Integration.
3. Click the Outbound tab.
4. In the All Internal Events section, navigate to Internal Events > Custom > Custom Contact Events.
5. Click the down arrow beside Custom Contact Events.
7. In the Custom Event screen, specify the name of the custom event. Enter the value Create Lead, then click Save.
8. To create the external call for the new custom event, click the down arrow beside the new Create Lead custom event in the All Internal Events section, then select Create New External Call.

The External Call wizard starts.

In the External Call wizard, enter the information for each step as described, then click Next to proceed to the following step.

Step 1 - External Call Details
Specify values for the external call fields shown in the following table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>External Call Name</td>
<td>Create Lead</td>
</tr>
<tr>
<td>Save in Folder</td>
<td>Send Data</td>
</tr>
<tr>
<td>External User</td>
<td>If you have multiple users set up, make sure you use the correct one.</td>
</tr>
<tr>
<td>Delay This Call By</td>
<td>0 hours</td>
</tr>
</tbody>
</table>

Step 2 - Target Details
Specify details for the data target fields shown in the following table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action</td>
<td>Create</td>
</tr>
<tr>
<td>Entity</td>
<td>Lead (Lead)</td>
</tr>
<tr>
<td>Field to store the Oracle Sales Cloud entity ID</td>
<td>Oracle Sales Cloud Lead ID</td>
</tr>
</tbody>
</table>

Step 3 - Field Mapping
Map Oracle Sales Cloud lead fields to Oracle Marketing Cloud fields. To map a field, move a value from the Eloqua Fields column to the appropriate row of the Field Expression column.

It is recommended that you map the following fields to Oracle Marketing Cloud. These fields are standard fields in Oracle Marketing Cloud and in Oracle Sales Cloud.

- Lead Name
• Primary Contact ID
• Account ID
• Address 1
• Address 2
• Address 3
• City
• Country
• Postal Code
• Email Address
• First Name
• Last Name
• Province
• State
• Company Name
• Mobile Phone
• Business Phone
• Industry

Step 4 - Event Mapping
This screen allows you to verify that the external call and event mapping is correct. Verify that the Create Lead custom event created earlier is mapped to the Create Lead external call you just created.

Step 5 - Testing
Test the external call you created as follows.

1. In the External Call Parameters section, select a contact by clicking the Search Contact icon, and then enter a search query.
2. Once you have located the appropriate record, from the drop-down menu beside the record choose Select Item, and then click OK.
   You return to the original screen.
3. Click Prepare for Test.
   For each of the fields you mapped for the Create Lead external call, the current value of the field in Oracle Sales cloud is displayed, as is the value that will be synchronized to Oracle Marketing Cloud.
4. Click Execute Test.
5. Click Finish to complete the test. A message is displayed indicating that the external call was created.
Creating a Program to Generate Leads and Update Contacts

The following topics describes how to use the Program Builder templates provided with the integration to create a Program Builder program that uses new and updated contact data in Oracle Marketing Cloud to generate leads in Oracle Sales Cloud. To create the Program Builder program to synchronize Marketing Cloud data, do the following:

1. Review the predefined program templates and select the one you want to use.
   
   For information, see the topic Program Builder Templates: Explained.

2. Edit the template you’ve chosen to use and update it with information about the Update Contact and Create Lead external calls you created previously.
   
   For information, see the topic Editing the Program Builder Template Program: Procedure.

How the Template Programs Match Records

The mechanism that is used in each of the templates to cross-reference the contact records in Oracle Sales and Oracle Marketing is the CRM ID attribute in the contact or lead record. The CRM ID of each sales lead, account, and contact record synchronized from Oracle Sales Cloud is retained on the corresponding record in Oracle Marketing Cloud.

Before synchronizing a contact, Program Builder determines whether or not the contact, or a lead associated with the contact, already exists in Oracle Sales Cloud by determining whether or not the CRM ID attribute is populated. Then, regardless of the program template that you select, the following logic is implemented:

- **Existing Accounts and Contacts.**
  
  When an existing customer responds to an Oracle Marketing campaign, if a new prospective lead is created in Oracle Sales Cloud, the lead is associated with the corresponding sales account and contact records through the CRM IDs of the records. Any updates to the contact in Oracle Marketing Cloud are reflected in Oracle Sales Cloud.

- **New Accounts and Contacts.**
  
  When a new prospect responds to an Oracle Marketing campaign, because the prospect is not an existing Sales Cloud customer, there are no corresponding Sales Cloud account and contact records for the prospect. If a new prospective lead is created in Oracle Sales Cloud during the synchronization process, a salesperson can manually assign the lead to a contact or account in Oracle Sales Cloud when then lead is qualified and accepted by the salesperson. (All new leads created in Oracle Sales Cloud have a status of Unqualified.)

**Note:** In accordance with sales and marketing best practices, when a prospect generated in Oracle Marketing Cloud is captured as a lead in Oracle Sales Cloud, Oracle Sales Cloud is designated as the CRM customer master. As such, it is recommended that a salesperson qualify the prospective lead and determine its opportunity potential before creating an account or contact for the lead in Oracle Sales Cloud.
About the Program Builder Templates

This topic describes each of the three Program Builder templates that are provided with the integration. Review the description of each of the templates and decide which one is most appropriate for your implementation. You then use the template as the basis for the program you create to synchronize contact data in Oracle Marketing Cloud to Oracle Sales Cloud.

The templates are:

- Point of Interest
- Create Unique
- Hybrid

Each of the three templates provides a slightly different option for lead creation in Oracle Sales Cloud.

Point of Interest

The Point of Interest template program creates new leads and updates existing contacts in Oracle Sales Cloud; existing leads in Oracle Sales Cloud are not updated. Specifically, the program implements the following business process logic:

- A new lead is created in Oracle Sales Cloud for all new prospects or responses generated in Oracle Marketing Cloud even if there is an existing contact or lead record in Oracle Sales Cloud with the same email address.
- If there is a CRM contact or CRM account ID on the Oracle Marketing Cloud contact record, the new lead is linked to the contact or account in Oracle Sales Cloud.
- All new leads created in Oracle Sales Cloud have a status of Unqualified.
- Existing contacts in Oracle Sales Cloud are updated with any changes to the contact in Oracle Marketing Cloud.
The program flow is shown in the following figure.

Create Unique

The Create Unique template program creates new leads and updates existing contacts and leads in Oracle Sales Cloud. Specifically, the program implements the following business process logic:

- A new lead is created in Oracle Sales Cloud only if there is no existing contact or lead record with the same email address.
- If there is a CRM contact or CRM account ID on the Oracle Marketing Cloud contact record, the new lead is linked to the contact or account in Oracle Sales Cloud.
• If there is a CRM contact ID or CRM lead ID on the Oracle Marketing Cloud contact record, existing contact and lead records in Oracle Sales Cloud are updated with any changes to mapped fields in the contact or lead in Oracle Marketing Cloud.

If a lead is rejected in Oracle Sales Cloud, it still has a CRM lead ID in Oracle Marketing Cloud.

The program flow is shown in the following figure.

Hybrid

The Hybrid template program creates new leads and updates existing contacts and leads in Oracle Sales Cloud. Specifically, the program implements the following business process logic:

• A new lead is created in Oracle Sales Cloud only if there is no unconverted lead record with the same email address in Oracle Sales Cloud.

• If there is a CRM contact or CRM account ID on the Oracle Marketing Cloud contact record, the new lead is linked to the contact or account in Oracle Sales Cloud.

• If there is a CRM contact ID or CRM lead ID on the Oracle Marketing Cloud contact record, existing contact or unconverted lead records in Oracle Sales Cloud are updated with any changes to the contact or lead in Oracle Marketing Cloud.

If a lead is rejected in Oracle Sales Cloud, it still has a CRM lead ID in Oracle Marketing Cloud.
The program flow is shown in the following figure.

editing the program builder template program

This topic describes how to update the Program Builder templates provided with the integration to create a program that synchronizes Oracle Marketing Cloud contact data to Oracle Sales Cloud.

You must:

1. Edit the program template you have chosen to use by adding the Update Contact and Create Lead external calls you previously created as integration events to the program.
2. Enable the program for data synchronization.

edit the program builder template program

Perform the steps in the following procedure to edit the Program Builder templates.

1. Log in to Oracle Eloqua Marketing Cloud.
2. In the navigation bar at the top of the application window, select Settings > Setup > Database > Program Builder.
3. In the left-hand pane, click the Programs tab to view existing programs, and then navigate to the CRM Integrations folder.
4. Select the template you want to use in the integration, either Point of Interest, Hybrid, or Create Unique. The program is displayed in the right-hand pane.

5. Select the **Edit Program Details** option from the Program drop-down menu.

6. In the Program Details area, review the values listed and make changes to the **Program Name** and **Program Owner** fields if required.

7. Click **Save**.

8. From the Program drop-down menu, select **Edit Program Flow** to review and amend the program logic. The Program window is displayed. To make changes to the program logic, navigate to a step or decision, click the down arrow, and select one of the edit menu options.

9. To edit the program to add the Update Contact event:
   a. Navigate to the Update Contact step.
   b. From the drop-down menu, select the **Edit Step Default Action** option.
   c. In the Edit Action window, do the following:
      i. Select **All** in the Type list and **Run Integration Event** in the Action list.
      ii. In the Action Parameters area, in the **Custom Event** field, search for and select **Update Contact**.
      iii. Click **OK**.

10. To edit the program to add the Create Lead event:
    a. Navigate to the Update Contact step.
    b. From the drop-down menu, select the **Edit Step Default Action** option.
    c. In the Edit Action window, do the following:
        i. Select **All** in the Type list and **Run Integration Event** in the Action list.
        ii. In the Action Parameters area, in the Custom Event field, search for and select **Create Lead**.
        iii. Click **OK**.

11. If you are using either the Create Unique or the Hybrid program template, you must also edit the program to add the Update Lead event. Perform the following procedure for both occurrences of the Update Lead step in the template:
    a. Navigate to the Update Lead step.
    b. From the drop-down menu, select the **Edit Step Default Action** option.
    c. In the Edit Action window, do the following:
       i. Select **All** in the Type list and **Run Integration Event** in the Action list.
       ii. In the Action Parameters area, in the Custom Event field, search for and select **Update Contact**.
       iii. Click **OK**, and then click **Save and Close**.

**Enabling the Program**

When you have finished editing the template program and are ready to start synchronizing data to Oracle Sales Cloud, enable the program by performing the steps in the following procedure.

1. In Program Builder, navigate to the program you updated for the integration.
2. Click the Program menu, and then select the **Run Program Checker** option to ensure there are no configuration errors in your program.
3. If the program checker does not highlight any errors, click the Program menu, then select the **Enable Program** option.
4. On the Program Run Mode window, select the mode in which you want to run the program by selecting the appropriate **Enable** button.
Generally, it is recommended that you run the integration program in **Priority Mode**.
5 Oracle Sales Cloud Configuration

Overview

This chapter describes how to configure Oracle Sales Cloud to enable the integration. You must have the Sales Administrator job role, and the Resource and Employee abstract roles, to access the integration functionality and perform the configuration tasks described in this chapter. The Sales Administrator job role is required to access Personally Identifiable Information (PII), such as email address, or mobile phone data.

Note: Use the Manage Users work area, and not the Security Console, for creating Sales Cloud users. For information on creating users and provisioning them with the job roles they need to do their work, see the Oracle Sales Cloud Securing Sales guide.

Using Sandboxes

Sandboxes in Oracle Applications provide functionality to help isolate and control customization efforts without impacting other users’ configuration environments or the production environment. Use sandboxes to test the Oracle Sales Cloud configuration tasks described in this chapter before publishing the changes. For more information on using sandboxes, see 1484889.1 (Doc ID) on My Oracle Support.

Creating Sandboxes

You create sandboxes under the Oracle Sales Cloud Administration menu at the top right of the screen. To create a sandbox, perform the steps in the following procedure.

1. Log in to Oracle Sales Cloud, navigate to the Administration menu, and then select the Manage Sandboxes option.
2. Click New.
3. Name the new sandbox, and then save it.
4. After you see the newly created sandbox in the list, click in the sandbox row (not on the name link), and then click Set as Active. This activates the new sandbox.
5. Log out, then log back in to start using the sandbox.

Validating Sandboxes

To validate changes made in a sandbox, test them by using the added Oracle Sales Cloud functionality.

Publishing Sandboxes

To publish a sandbox, perform the steps in the following procedure.

1. Make sure the sandbox is currently active.
2. Click the sandbox link. The Sandbox Details window appears.
3. Click Publish.
4. Log out, and then log back in.
The changes in the sandbox are published so that they are viewable by all users.

Options for Accessing Digital Data in Oracle Marketing Cloud

Using integration functionality, you can access digital activity data maintained for users in Oracle Marketing Cloud from the Oracle Sales Cloud UI. The following options are available:

- Display an embedded Digital Profile infolet on the Contact - Overview page to display digital activity data for a contact.
  
  This infolet is provided with the integration but must be made visible on the UI using Application Composer. For information, see the topic, Configuring Access to the Digital Profile Infolet.

- Extend the integration by creating custom links to Oracle Eloqua Profiler for leads and to Oracle Eloqua Engage for contacts and leads, and then embed the links in the Sales Cloud UI.
  
  For information, see the topic Configuring Access to Digital Profile and Interaction Data for Leads and Contacts.

Requirements for Accessing Digital Data

Implementing access to digital activity data in Oracle Marketing Cloud requires the following:

- The user that connects to Oracle Marketing Cloud must have a license for Oracle Eloqua Profiler and Oracle Eloqua Engage if you want to access data from these tools.
  
  For information see the topic Configuring Access to the Digital Profile Infolet.

- The Sales Cloud users for whom you want to display digital data must also be defined as users in Oracle Marketing Cloud. The email address of the user must be the same in both applications.

Configuring Access to the Digital Profile Infolet

This topic describes how to enable the Digital Profile infolet provided with the integration which you can optionally display on the Edit Contact - Overview page.
The Digital Profile infolet shown in the following figure displays summary information about a contact’s digital activities, such as the number of websites visited or form submissions made. You can also drill down on each activity type to access the Digital Profiler tool in Oracle Marketing Cloud where detailed information for each activity is available.

To enable the Digital Profile infolet functionality, perform the following tasks:

- Set up a connection to Oracle Marketing Cloud.
- Display the infolet using Application Composer.

Both tasks are described in the following sections.

Note: Before you enable the Digital Profile infolet, make sure that the Dhttps and JSSE settings are enabled on your environment.

Configuring a Connection to Oracle Marketing Cloud

In Oracle Sales Cloud, perform the following steps to set up a connection to Oracle Marketing Cloud.

1. Navigate to the Setup and Maintenance work area.
2. Select the Sales offering, then search for the Manage Sales Cloud to Marketing Cloud Integration task.
3. Select the task in the search results list, and then click OK.
4. On the Eloqua Cloud integration screen, enter the values for the fields shown in the following table to configure the connection to Marketing Cloud.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>URL</td>
<td>The URL of your Oracle Eloqua Marketing Cloud instance. If you are using Oracle Sales Cloud Release 12, patch bundle 10 or later, you must specify the following URL: <a href="https://login.eloqua.com">https://login.eloqua.com</a></td>
</tr>
<tr>
<td>Security Policy</td>
<td>For example: oracle/wss_username_token_over_ssl_client_policy</td>
</tr>
<tr>
<td>Username</td>
<td>Enter the company name and user name used to connect to Oracle Eloqua Marketing Cloud in the following format: Company_Name/Username_Name</td>
</tr>
<tr>
<td>Field</td>
<td>Value</td>
</tr>
<tr>
<td>-----------</td>
<td>----------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Field</strong></td>
<td><strong>Value</strong></td>
</tr>
<tr>
<td>The user you specify must have a license for Oracle Eloqua Profiler and Oracle Eloqua Engage if you are configuring access to data from these tools.</td>
<td></td>
</tr>
</tbody>
</table>

**Password**
The password used to connect to Oracle Eloqua Marketing Cloud.

Displaying the Digital Profile Infolet on the UI
Perform the steps in the following procedure to make the Digital Profile infolet visible on the Contact Overview page using Application Composer.

1. Navigate to the Application Composer work area (Navigator > Configuration > Application Composer).
2. In the Objects area, expand **Standard Objects**, then expand the node for the **Contact** object and select **Pages**.
3. On the Simplified Pages tab, navigate to the Detailed Page Layouts section.
4. Edit the Default layout (or make a copy of the default layout if you prefer).
5. In the Subtabs region, select the Overview icon (the first icon in the list).
6. Click the Create Infolet Group icon, which is located near the end of the page.
7. On the Create Infolet Group page, enter a name for the new infolet in the **Infolet Group Name** field, for example, **Digital Activities**, or **Digital Profile**.
8. Shuttle the following infolets from the Available Infolets region to the Displayed Infolets region:
   - Form Submissions
   - Website Visits
   - Opened E-Mail
9. Click **Save and Close**.
10. Test your changes in the sandbox before publishing. For information, see the topic Using Sandboxes.

Configuring Access to Digital Profile and Interaction Data for Leads and Contacts

Overview
You can create custom links in the Oracle Sales Cloud UI that users can click to access digital profile and interaction data maintained in Oracle Marketing Cloud for a contact or lead. To enable this functionality, you must:

1. Create custom links to Oracle Eloqua Profiler and Oracle Eloqua Engage (Lead object) or to Oracle Eloqua Engage (Contact object). For information, see the following topics:
   - Creating Custom Links for the Sales Lead Object
   - Creating a Custom Link for the Contact Object

**Note:** You do not have to create a custom link to Oracle Eloqua Profiler for the Contact object because the Digital Profile infolet provides this functionality. For information, see the topic Configuring Access to the Digital Profile Infolet.
2. Add the custom links to the Sales Cloud UI. For information, see the following topics:
   - Adding Custom Links to the Sales Lead UI
   - Adding the Custom Link to the Sales Contact UI

Consult with Oracle Marketing Cloud to determine the URLs to use for the Oracle Eloqua Engage and Oracle Eloqua Profiler applications.

**Note:** You can embed the Eloqua Profiler and Eloqua Engage pages as subtabs in the Sales Cloud UI instead of creating links. For information on creating subtabs, see the guide Oracle Sales Cloud Customizing Sales at http://docs.oracle.com.

### Creating Custom Links for the Sales Lead Object

Perform the steps in the following procedure to create custom links to Oracle Eloqua Profiler and Oracle Eloqua Engage for the Sales Lead object.

1. Log into Oracle Sales Cloud as a user with the system administrator role.
2. Navigate to the Application Composer work area (Navigator > Configuration > Application Composer).
3. In the **Objects** area, expand **Standard Objects**, and then expand the node for the **Sales Lead Contacts** object.
4. Select **Actions and Links**.
5. Create the link to Eloqua Engage:
   a. In the Sales Lead Contacts: Actions and Links area, click the Create icon.
   b. Set the value of the **Display Label** field to **Eloqua Engage**.
   c. Verify that the **Name** field is automatically set to **Eloqua_Engage**.
   d. To indicate the **Type** of item you want to create, click the **Link** radio button.
   e. In the Script region, click the New icon.
   f. In the expression text box, enter the Oracle Eloqua Engage URL with arguments as follows:
      ```
      "https://login.eloqua.com/autoLogin?LoginPrefix=<Your_Eloqua_Prefix>&Url=/apps/engage?sendTemplateToContacts/" + nvl (PersonEmail,"no email")
      ```
      where `<Your_Eloqua_Prefix>` is the prefix of your Oracle Eloqua instance. If you don’t know what your prefix is, contact Oracle Eloqua Product Support.
   g. Validate the script by clicking the Validate icon.
   h. If the script validates successfully, click the **Save** button.
6. Create the link to Eloqua Profiler:
   a. In the Sales Lead Contacts: Actions and Links area, click the Create icon.
   b. Set the value of the **Display Label** field to **Digital Profile**.
   c. Verify that the **Name** field is automatically set to **Digital_Profile**.
   d. To indicate the **Type** of item you want to create, click the **Link** radio button.
   e. In the Script region, click the New icon.
   f. In the expression text box, enter the Oracle Eloqua Profiler URL with arguments as follows:
      ```
      https://login.eloqua.com/autoLogin?LoginPrefix=<Your_Eloqua_Prefix>&Url=/apps/profiler?emailAddress=" + nvl(PersonEmail,"no email")
      ```
      where `<Your_Eloqua_Prefix>` is the prefix of your Oracle Eloqua instance.
g. Validate the script by clicking the Validate icon.

h. If the script validates successfully, click the **Save** button.

## Adding Custom Links to the Sales Lead UI

Perform the steps in the following procedure to add the Eloqua Engage and Eloqua Profiler custom links you created for the Sales Lead object to the Sales Lead UI.

1. In Application Composer, in the **Objects** area, expand **Standard Objects**, then expand the node for the **Sales Lead** object.
2. Select **Pages**, and then click the Simplified Pages tab.
3. In the Details Page Layouts area, edit the Default Layout.
4. Edit the Summary area.
5. Move the custom links you created for Eloqua Engage and Eloqua Profiler from the Available Fields list to the Selected Fields list, and position them as required.
6. Click **Save and Close**, and then **Done**.

You can view the custom links on the Sales Edit Lead UI as shown in the following figure.

### Creating a Custom Link for the Contact Object

Perform the steps in the following procedure to create a custom link to Oracle Eloqua Engage for the Contact object.
You do not have to create a custom link to Oracle Eloqua Profiler for the Contact object because the Digital Profile infolet provides this functionality. For information, see the topic Configuring Access to the Digital Profile Infolet.

1. Log in to Oracle Sales Cloud as a user with the system administrator role.
2. Navigate to the Application Composer work area (Navigator > Configuration > Application Composer).
3. In the Objects area, expand Standard Objects, expand the node for the Contact object, and then select Actions and Links.
4. Create the link to Eloqua Engage:
   a. In the Contact: Actions and Links area, click the Create icon.
   b. Set the value of the Display Label field to Eloqua Engage.
   c. Verify that the Name field is automatically set to Eloqua_Engage.
   d. To indicate the Type of item you want to create, click the Link radio button.
   e. In the expression text box, enter the Oracle Eloqua Engage URL with arguments as follows:

   ```
   sendTemplateToContacts/" + nvl(PersonEmail,"no email")
   ```

   where <Your_Eloqua_Prefix> is the prefix of your Oracle Eloqua instance. If you don't know what your prefix is, contact Oracle Eloqua Product Support.
   f. Validate the script by clicking the Validate icon.
   g. If the script validates successfully, click Save.

### Adding the Custom Link to the Sales Contact UI

Perform the steps in the following procedure to add the Eloqua Engage custom link you created for the Contact object to the Sales Cloud Contact UI.

1. In Application Composer, in the Objects area, expand Standard Objects, expand the node for the Contact object, and then select Pages.
2. Click the Simplified Pages tab.
3. In the Details Page Layouts area, edit the Default Layout.
4. Edit the Summary area.
5. Move the custom link you created for Eloqua Engage from the Available Fields area to the Selected Fields area, and position it as required.
6. Click Save and Close, and then Done.
You can view the custom link on the Sales Cloud Edit Contact UI as shown in the following figure.
6 Postconfiguration Tasks

Overview

This chapter details further tasks that you must perform after configuring Oracle Marketing Cloud and Oracle Sales Cloud for the integration to work correctly.

Enabling the CRM Integration Queues

Oracle Eloqua Marketing Cloud provides a number of reporting functions that allow you to monitor integration activity between Oracle Sales Cloud and Oracle Marketing Cloud. For example, you can view detailed information for your outbound integration by viewing statistics for the following queues:

- **Internal Event Queue.**
  
  This queue lists internal events in Oracle Eloqua that are subject to integration updates in Oracle Sales Cloud.

- **External Call Queue.**
  
  This queue lists calls made to Oracle Sales Cloud to synchronize data with Oracle Marketing Cloud.

The Internal and External queues can be in either a Paused or an Enabled state. When a queue is paused, all new calls are added to the corresponding queue, but they are not processed until the queue is enabled. Make sure that both queues are enabled in your environment by performing the steps in the following procedure.

1. Log in to Oracle Eloqua Marketing Cloud with administrator privileges.
2. In the navigation bar at the top of the application window, select **Settings > Setup > Integration**.
3. On the Oracle Sales Cloud Integration Status screen, from the Reporting menu, select **Integration Reporting**.
4. In the Internal Event Queue Stats area, verify the queue status:
   - If the status icon is labeled **Pause**, then the queue is enabled. No action is required.
   - If the status icon is labeled **Enable**, then the queue is paused. Click the button to enable the queue.
5. In the External Call Queue status area, enable the queue if necessary by clicking the **Enable** button.
7 Closed-Loop Reporting Dashboards and Reports

Overview

This chapter describes the closed-loop reporting options available in Oracle Marketing Cloud.

Oracle Sales Cloud opportunity data is synchronized to Oracle Marketing Cloud where it can be used to develop models for assessing campaign effectiveness. Closed-loop reporting allows you to attribute sales opportunity revenue to marketing campaigns so that you can analyze your overall campaign revenue performance (ROI), and identify the best and worst performing campaigns.

After implementing the integration and completing the closed-loop reporting tasks described in the topic Configuring Closed-Loop Reporting, you can use the preconfigured closed-loop reports and dashboards in Oracle Marketing Cloud.

**Note:** You do not have to implement closed-loop reporting functionality. However, configuring closed-loop reporting is required if you want to use the preconfigured closed-loop reporting dashboards and reports.

Related Topics

- Configuring Closed-Loop Reporting: Procedure

Viewing Preconfigured Closed-Loop Reporting Dashboards and Reports

The closed-loop reports and dashboards provide information on the effectiveness of campaigns using measures such as revenue generated, or opportunities closed. This topic explains how to access these reports and dashboards and provides a brief description of each.

**Note:** Campaign response and opportunity data must be preset in Oracle Eloqua and available in Oracle Eloqua Insight in order for the reports to be populated with data.

Perform the steps in the following procedure to access the closed-loop reporting dashboards and reports.

1. Log in to Oracle Eloqua Marketing Cloud with a user ID that is assigned Eloqua Insight Reporter User access.
2. In the Navigation bar at the top of the application window, select Insight.
3. On the Home page, expand the Reports and Dashboards folder. This folder contains the standard reports and dashboards provided with Insight.
4. Select the Closed-Loop Reporting folder.
5. All the predefined closed-loop reports and dashboards are displayed.
6. Select the report or dashboard you want to run.
The following preconfigured closed-loop reports and dashboards are available. You can also create customized reports and dashboards according to your business requirements. For additional information on the reports and dashboards, see ELOQUA INSIGHT Report Details Guide.

The following closed-loop reports are available to assess campaign effectiveness:

- Campaign Cost Metrics report. It shows the results of campaign spend in terms of cost per lead and cost per opportunity.
- Campaign Revenue Analysis report. It shows the attributed revenue results for a campaign, the resulting return on investment (ROI), and the cost metrics for a campaign.
- Opportunity Overview report. It shows the list of opportunities and their details.

The following closed-loop reporting dashboards are available for evaluating campaigns:

- Opportunity Influence. It shows the influence that a contact or set of contacts has on an opportunity.
- Return: Revenue Performance Dashboard. It shows the overall revenue results, overall campaign revenue performance, and best and worst performing campaigns.
- Revenue Analysis by Campaign Region. It shows revenue results by campaign region.
- Revenue Analysis by Campaign Product. It shows revenue results by campaign product.
- Revenue Analysis by Campaign Type. It shows revenue results by campaign type.