5 ELOQUA HACKS YOU CAN USE TODAY



If you're the "Eloqua person" at your company, you've probably run into a situation where someone asks "Can we . . . in Eloqua?" Often, the answer is simply using an Eloqua native functionality. However, on occasion there is a request that needs a little creative thinking (an Eloquirk?).

Through our work as power users, we've come across a few things that might be helpful for you. Here are five Eloqua hacks that you can use today. Enjoy – and contact us if you have questions about the practical application of these technology tips.



HTML Email - Applying a Preview Message

SITUATION: Conversion rate for your campaign is a little low – particularly the open rate.

HACK: Use a preview message as powerful as the supporting content to improve conversion rates. Think of the subject line as your lead message and your preview message as the supporting message. The preview message can be hidden in the code of an email and is only seen by the email client.

HOW TO APPLY THE PREVIEW MESSAGE IN ELOQUA

Emails in Eloqua have three content sections: header, body and footer.

The body section is the "customized section" for each email. The header and the footer are often reusable content that is normally not customized for each email. Preview messages need to be added to HTML in Eloqua. It is not supported in the design editor mode. Since custom email headers are not typically created for each email, you need to move the pre-header into the Eloqua body section.

BLANK ELOQUA HEADER

1. PREVIEW MESSAGE: not visible in the email content

2. PREHEADER: If you are having trouble viewing email, read the online version

3. Email content

</body>

ELOQUA FOOTER

CREATING THE PREVIEW MESSAGE:

- 1. Assets > Components > Email Header Copy your HTML preheader code from your email header.
 - Open your email header that contains your Preheader content, select the Src button, then copy all the HTML content.



Go to your email HTML code — Copy and paste the code below the <body> tag in the HTML of your email. Edit the content to reflect your new message (in green).

<div style="display: none; font-size: 0px; line-height: 0px; max-height: 0px; max-width: 0px; width: 0px; opacity: 0; overflow: hidden;"> ♥:♥:Preview messages are customized content that is invisible to the reader within the actual email content. </div>



Note: ♥ are ASCII hearts

- Replace your email header that contains the Preheader content with a blank email header. If you do not have a blank email header, you will 3. need to create a new email header.
- Navigate to Assets > Components > Email Header > New New Delete Do not add any content to this header. Save it as "Blank Header." New Folder Search Return to your email and navigate to Settings. Update the email header to Blank Header. 4. Email Header: Blank Header -BLANK ELOQUA HEADER <body>
 1. PREVIEW MESSAGE: not visible in the email content This is the final order of the Preview Message and Preheader that should appear in your HTML code. Test your email preview message. Send a test email to yourself. 3. Email content 5.

2. PREHEADER: If you are having trouble viewing email, read the online version </body> ELOQUA FOOTER

Example: Preview Message and Preheader Text Displays the Preview Message	Example: Without a Preview Message Displays the Preheader Content
Preview Message text in Outlook 2016 Email	Without a Preview Message text in Outlook 2016 Email
Simantel	Simantel
* TEST * This is the subject line for your email * TEST *	* TEST * This is the subject line for your email * TEST *
** Preview messages are customized content that is invisible to the reader within	If you are having trouble reading this email, read the online version
Preview Message text in Outlook 2016 message alert	Without a Preview Message text in Outlook 2016 message
popup window	alert popup window
Simantel	Simantel
* TEST * This is the subject line for	* TEST * This is the subject line for
your email * TEST *	your email * TEST *
* Preview messages are customized	If you are having trouble reading this
content that is invisible to the reader w	email, read the online version <http: s<="" td=""></http:>
Only the Preheader content appears visible to the reader in the email window and the Preview Message does not appear	Preheader content is visible to the reader in the email





PREVIEW MESSAGE TIPS

- Don't repeat your subject line or the preheader text in your preview message.
- Keep it short, 35 50 characters max.
- Highlight a secondary call-to-action within your preview message.
- For events, highlight the date and time.
- Add #hashtags for branding of social media campaigns

EMAIL CLIENTS THAT SUPPORT PREVIEW MESSAGES

When using preview messages, keep in mind that not all users display the preview messages consistently. Some support short mobile device lengths, while others display messages based on the length of the subject line.

To determine length, know how your target audience is viewing the email. Here is a guide for you to follow.

DESKTOP EMAIL CLIENTS	NUMBER OF CHARACTERS DISPLAYED
Apple Mail	140
Outlook for Mac 2015	55
Outlook 2013, Outlook 2016	35

MOBILE EMAIL CLIENT	NUMBER OF CHARACTERS DISPLAYED
Android Native App	40
Android Gmail App	Varies depending on the subject line length
Android Yahoo! App	45
iOS Native App	90
iOS Gmail App	50
iOS Yahoo! App	50
Windows Phone	40

WEBMAIL	NUMBER OF CHARACTERS DISPLAYED
AOL Mail	75
Gmail	Varies depending on the subject line length
Yahoo!	Varies depending on the subject line length
Outlook.com	Varies depending on the subject line length
Mail.ru	Varies depending on the subject line length
iOS Yahoo! App	50

Source: Litmus

EMAIL CLIENTS THAT DO	NOT SUPPORT PREVIEW MESSAGES:
Outlook 2003	GMX
Outlook 2007	Web.de
Outlook 2010	Freenet.de
Blackberry	Source: Litmus

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Events Module – Finding Unmapped Contacts

SITUATION: You have an external list and want to know how many of the contacts are currently in your Eloqua database.

HACK: Use the Events Module to determine how many of the contacts on the external list already exist in your database. Don't worry, any unmapped records do not get added to your contact database.

- 1. Orchestration > Tools > Events
- 2. Events > New Event Registration
- 3. Insert event name following your naming convention protocol, a description, and place in a folder. Click Save.
- 4. Click Edit on the 'Registrant Info' section.

✓ Registrant Info	🖉 Ed

5. On the 'Registrant Info' screen, click Options > Create Custom Field.

Registrant Info	<u> </u>
Test-Rachel	Create Custom Field
Overview - In this section, you are updating the Registrant information fields. The fields are automatically created from a linked form custom fields eg. Attended? With the Create Custom Field option. If you do not currently have a linked form or would lik the Link New Form option.	Link New Form
Fields	Field Mapping
Event Field Default Value Data Type Special	Email Fields

- 6. On the 'Create Custom Object Record Field' window enter Email Address for Field Name. Click Save and Close.
- 7. On the 'Registrant Info' screen, click Options > Edit Special Fields.

Registrant Info	9
Test-Rachel	Create Custom Field
Overview - In this section, you are updating the Registrant information fields. The fields are automatically created from	a linked form
custom fields eg. Attended? With the Create Custom Field option. If you do not currently have a linked form the Link New Form option.	n or would like 🏏 Edit Special Fields
Fields	Field Mapping
Event Field Default Value Data Type Special	

8. On the 'Edit Special Fields' window, click 'Use the Email Address Field' as the Unique Code. Click Save and Close.

Test-Rachel Overview - There are two The Email Ad identifier prev Address field generated for select a differ	specials fields: A Unique Identifier Field and an Email Address Field. tress Field identifies which field contains the Email Address. The unique nnt duplication of Registrants based on this field; by default the Email is selected. If you select Eloqua Identifier, then a 16 dig to cole will be you. Once Registrants have been added to the Event, you cannot nu lunique code field.
Email Address	Email Address
Unique Code	Use the Email Address Field
	Use an Eloqua Identifier
	Use Email Address



12. It's now time to map contacts. On the Event screen, under Event Overview, click the button Map Registrants to Contacts by Email Address.

Tap Registrants to Contacts by Email Address

13. A 'Map Registrant' window opens to confirm that the mapping has been completed. The notification provides a count of how many contacts were matched and have been linked.

Registrants Auto Mapping. Test

The mapping has been completed successfully: 1 out of 1 have found a matched Contact and have been linked.

14. On the Event screen, under Event Overview a summary is available to show the Total Number of Registrants (number of contacts you uploaded) and the Total Number of Unmapped Registrants.

Total Number of Registrants	200 View Registrants
Total Number of Unmapped Registrants	51 🦉 View Unmapped Registrants

15. The Unmapped Registrants are the contacts who were uploaded from your list but do not exist in Eloqua as a contact.

Analyzer – Custom Data Object Reporting

SITUATION: You have information saved to a Custom Data Object (CDO) that is not saved to the contact record. You also have activity data that is available in a Classic Insight report. But, you need all sets of data in one, holistic report.

HACK: Custom Data Objects (CDO) can be added to reporting to gather a more complete view of a contact's history. The CDO reporting can provide insight to data points that were not saved to the contact record. All types of CDO fields can be used in reporting – text, large text, numeric and date. **Note: An analyzer license is required for this "hack."**

CUSTOM DATA REPORTING SETUP

1. Contacts > Custom Objects > Insight Setup > Custom Data Reporting Setup



2. Select Custom Object and click Include in Insight.

	isignit bottap
Colort a custom data object	
select a custom data object	
	Include in Inside

3. Select Custom Object data fields and search for the Custom Object Record fields to be included in the reporting.

Custom Data Objects	GCI_FGP Machine CDO_0415		× Remove	from Insigh
CF - Title, Function, FPD Details	Select custom data fields			
GCI - Conexpo Sweepstakes	🦢 🧽 Include Field in Insight			
OHT_Americas	Included Fields			
North on US LondGon OMM REPO CDO 0215				
North_en_US_LeadGen_OMM_REPO_CDO_0215 Test CDO	Field Name	Field Type	Frequently searched field	
North_en_US_LoadGen_OMM_REPO_CDO_0215 Test CDO GCL_FGP Machine CDO_0415	Field Name FGP Machine: CIC Dealer name	Field Type Text	Frequently searched field	×

Custom C	bject Record Field Search		Selected Custom Ob	ect Record Field	D Clea
Name	View Recent	search	Name: FOP Muchine: ID Guatem Object: GCI_FOP Machine CDO_S415 Data Type: Text		
Custor	n Object Record Field Sea (s) (All)	rch: Found 17		Page 1 of 2	« <
	¢ Name		Custom	Object	Data Type
	FGP Machine: ID		GCI_FGP Machine CDO	_0415 1	lext
	FGP Machine: Status		GCI_FGP Machine CDO	_0415 1	lext
	FGP Machine: Family		GCI_FGP Machine CDO	_0415 1	lext
	FGP Machine: Model		GCI_FGP Machine CDO	_0415 1	lext
	FGP Machine: Purchase d	ato	GCI_FGP Machine CDO	_0415	late
	FGP Machine: SFDC ID		GCI_FGP Machine CDO	_0415 1	ind
	FGP Machine: Original ID		GCI_FGP Machine CDO	_0415 1	lext
	Email Address		GCI_FGP Machine CDO	_0415 1	text
	FGP Machine: Expiration d	late	GCI_FGP Machine CDO	_0415 0	Jate

4. Once the fields are selected click Include Field in Insight.

Note: There is a limit of 25 Custom Object Record fields per Custom Data Object report.



 Click the Save button at the bottom of the main screen, and you'll see a message stating that it will take 10 minutes for the custom object to be updated in Insight.

SUCCESS - Please allow 10 minutes for the selected custom data objects to be updated in Insight.

ADDING CUSTOM DATA OBJECTS TO STANDARD REPORTS

With Analyzer, you can access your CDO data and add it to standard Insight reports.

1. Select to view All Objects from the Tools drop-down menu.

Tools •	Data 🔻	Grid	Format
New			
Crea	ite Dashbo	ard	
Crea			
Rep	ort Objects		
All C	bjects		
Rela	ted Report	S	

2. In All Objects search for Custom Data Objects or navigate there by Schema Objects > Attributes > Contact > Custom Data Objects.



3. Select your Custom Data Objects folder and drag and drop your CDO reporting fields on to the report.

Curtare Data Object
Search for:
<u>Customer Data Object4</u> <u>EMSolutions Profile Indicator</u> <u>GCL_FGP Machine CDO_0415</u> GCI - Conexpo Sweepstakes

When using custom data object fields on your standard or custom reports all functionality for customization remains and all sharing options exist. You can still sort, format, export, and most importantly, set up subscriptions.

All columns of this report are able to be filtered. For example:

- Campaign Most Recent.
 - · Select one or more specific campaigns to display

VIEW FILTER Add Condition X Clear All

Campaign Most Recent (ID) Contains "Testing"

- Form Submit Date/Time.
 - Select a date range of form submission date

VIEW FILTER Y[®] Add Condition Clear All Auto-Apply changes Nost Recent Form Submit Date/Time (ID) Between "12/1/2015 12:00:00 AM" AND "12/18/2015 3:00:00 PM"

PRO HACK: CUSTOM CDO REPORT CONFIGURATION

Inside your individual Eloqua account, you must set-up which Custom Data Object fields will be available in Insight.

- Follow the CUSTOM DATA REPORTING SETUP process. Note: The first set-up is in your individual Eloqua account and not within Insight/Analyzer.
- Login to Insight with the Analyzer license to build a custom report that is built on the CDO. In addition, contact and account fields can be added to the report like email address domain.
- 3. Create Report > New Report > Report Builder.
- 4. Choose the attributes of the report. Select Schema Objects > Attributes > Contact > Custom Data Objects > Select the name of the custom data object > move the CDO fields over to the right.



5. Skip steps 2, 3 and 4. Click Run Report. Right click on the column header and select Filter On to begin building filters on the new custom CDO report.

VIEW FILTER	Add Condition	X Clear All	Auto-Apply chang	es
× Most Recent F	orm Submit Date/Tim	e (ID) Between	"12/1/2015 12:00:00 AM" AN	D "12/18/2015 3:00:00 PM"

CDO REPORTING CONSIDERATION

If set-up of the CDO is set to be unique based on email address, then your report will be deduped. If the contact submits the form multiple times, then the CDO will only capture the most recent form submission. Consider your reporting needs when setting up the CDO to determine if a unique identifier other than email address should be selected.

Display Name Field	Email Address	0
Unique Code Field	Email Address	٥
Email Address Field	Email Address	0

CDO REPORTING LIMITATIONS

There is a limit of 25 Custom Object Record fields per Custom Data Object report.

Custom data objects fields from different custom data objects can be added to the same report. If you hit limitations and have additional CDO fields to add, then follow the Custom Data Insight Set-up to make different CDOs available within Insight.

Some fields could not be added due to the following errors: A maximum of 25 text or large text fields can be selected. Prevent this page from creating additional dialogs

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OK

Analyzer – Remove Personally Identifiable Information (PII) from Reporting

SITUATION: Data is a huge part of marketing automation. But, with sensitivity around data and data breaches, you have a request to report on form submission data without including any personally identifiable information (PII).

HACK: The option to remove PII from form submission data reports is available within Analyzer.

Y									
UserFormSubmit	Form Submit Date/Time	First Name	Last Name	Com	pany Title	Address	Address	City State	Zip Phone
	Plantine.	Arrest	Tyree .	Stations r	.00100	ine.	+0.0	Name Transform	
	1000	-	Policeane:	April abalant to	inch.	-		Tanatase	THE West Read In
	1000	Torest	ilee -	terased grater			June 1978		
153048	100	Paratra		transfersture	J Ran Horn, Brang Koros, Katholis		274		Fillers fairs (re)
18/10	1204	Press.	Tanan	stature tanàng mai ta	1 Revent Supported (see 1 m.	charac	-	Name Palantin	007.744

1. Run your form submission data report.

HACK 4

2. Click Add View Filter Condition... from the toolbar.



3. In the Filter On drop-down, select Field Name.



4. Move the non-PII fields that you want to display to the right and leave the PII fields on the left. Click Apply.



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Custom Data Object – Transactional Email Sends Reporting

SITUATION: You have a transaction based relationship with contacts in the United States that are not currently opted in to marketing communications and may not even be in your Eloqua database. You need to send a transactional message to these contacts.

HACK: After consultation with your data privacy legal counsel, you can send transactional messages from a Custom Data Object (CDO) without uploading the contact as globally subscribed. Note: The CDO Service will only send to Unknown Contacts who were previously a contact in your Eloqua database.

- 1. Create a new Custom Object by navigating to Audience > Custom Objects.
- 2. Click the dropdown for Custom Object > New Custom Object.
- 3. Give the Custom Object a name, description and place it in a folder.

Custom Object					
Custom Object details					
Display Name	Test_CDO				
Description	Example				
Туре	Custom Data Objects				
Place in folder	TESTING				
Default Entity Mapping us	ed in upload				
Entity Type	Contacts 🗢				
Entity Field	Email Address				

- 4. In the "Default Entity Mapping used in upload" section, choose the Entity Type and the Entity Field. Entity field will usually be Email Address. Click Save.
- 5. On the Custom Object Record Fields page, click Custom Objects Fields > Add a New Field.

Custom Object Record Fields	
	Add New Field
Test_CDO	8 Add Contact Fields
	Add Form Fields

 Add a Custom Object Record Field for Email Address. At a minimum Email Address is required, but more fields can be added if the data is available. Once all fields are added click Save.

Custom Object Record Field						
Custom Object Record Field details						
Field Name	Email Address					
Data Type	Text String Field (max 250 characters)					
Field type used when editing a Custom Object Record	Textbox 📀					
Default Value						
Display After	(none)					

- 7. On the Header Fields page, no action is needed. Click Save.
- 8. Your CDO is now created and ready for the Record Services preparation. The Record Services will send the email.
- 9. Navigate to Custom Object > Custom Object Record Services.

Custom Object	5	1	
custom object	Custom Obje	ect Record Fields	
Test_CDO	F Field Mappin	0	
		9	
Custom Object details		Copy Custon	n Object
Display Name	Test_CDO	Custom Obje	ect Record Services
Description	Example		
Туре	Custom Data Objects	2 New Custom	Object Record
Display Name Field	(none)	Cust	om Object Records
Unique Code Field (100 Character Limit)	(none)		
Email Address Field	(none)	View Custom	o Object Records
Total Number of Custom Object Records	0 🧉 View Custom Object Re	co 📖 Search for C	ustom Object Records
		Check Depen	dency
Custom Object parameters		Chock Depen	uonoy

10. On the Managed Services page, choose New Data > Edit Service Actions.

Μ	Manage Services Qustom Object Record Ser							
Te	Test_CDO							
Ov	Overview - Services monitor the changes within a set of Custom Object Records. They are used to automatically trigger one or more actions and run every 15 minutes. Some services are customizable and can be set up with one or more configurable Processing Steps.							
	Service	Last Run Time	Overview					
	Edit Service Actio	arvice Actions	When enabled, it will check for any new Custom Object Records that are registered.					
			When enabled, it will check for any modifications to Custom Object Record field values.					

11. On the Edit Service Actions window, click Add Processing Steps > Add Single Processing Step > Send Email > Add.

Add Processing Step							
Custom Object Record Ser	Custom Object Record Service						
Overview - Select a group of before a processi	processing steps or a single processing step to add to the ng step can become active. After adding the steps, you c	e form. Note: Most processing steps have required an configure these parameters by clicking on the s					
Add Processing Step Group	0						
Campaign Signup							
Add Single Processing Step)						
 A single processing step 	c .						
Step	Send Email	Description:					
Description	Subscribe to Email Group Unsubscribe From Email Group Save to Contact Table Email Notification Add to Contact Group Remove from Contact Group Unsubscribe at Site Level Subscribe to / Unsubscribe from an Email Group Add to Step in Program Builder Update Existing Record or Data Object Change Contact's Email Address Send Email Send Batch Email Add to Step in Program	record.					

12. On Edit the Processing Step window, add a description of the email. Update the Required Parameters section and then click Save and Close.

- a. Email Leave Source Type as Constant. Find your email in the Value field.
- b. Send Email To Change Source Type to Data Card File and the Value field to Email Address.
- c. Allow Resending Determine whether you would like emails to be resent.

Edit Processi	ng Step			
Send Email For New Data				
Alert! - This processing step ha	is been added recently and its require	ed parameters are not yet set.	Please specify these parameters and click	'Save' to enable the step.
Step Details				
Description Add a description				
Required Parameters	Pauraa Tuna	Value		6
France	Constant	value	[m]	
Email Send Email To	Data Card Fie	B Address		
		up		
Allow Resending	Constant ᅌ No		٥	
Optional Parameters				
This processing step does n	ot have any optional parameters.			
This Processing Step Gets E	xecuted			
Always				
Only if the following Cond	ition is met:			
Email Address	value Is	0 = 0	Search Builder	
When the following Data I	Lookup criteria Is 🔿 met:			
Once you have selected Data Lookup engine in o	a Data Lookup criteria you must m order to properly validate.	ap form fields to the		
			Close Save and	d Close

- 13. You now have the required processing step on the Edit Services Action Page. Click Close.
- 14. Close out of the Manage Services page.
- 15. Click Save on the Custom Object page.
- 16. Go back to Custom Object > Custom Object Record Services.

Custom Object	5	M	
	Custom Object Record Fields	prang -	
Test_CDO	Field Mapping		
Custom Object details		Copy Custom Object	
Display Name	Test_CDO	Custom Object Record Services	
Description	Example		_
Туре	Custom Data Objects	2 New Custom Object Record	
Display Name Field	(none)	1 Upload Custom Object Records	
Email Address Field	(none)	View Custom Object Records	
Total Number of Custom Object Records	0 🦉 View Custom Object Rec	Search for Custom Object Records	
Custom Object parameters		Check Dependency	

17. After being saved and closed, the dropdown for New Data will now have multiple options.

Manage Se	rvices		Qustom Object Record Servic	ces +
Test_CDO				
Overview - Services monitor the changes within a set of Custom Object Records. They are used to automatically trigger one or more actions and run every 15 minutes. Some services are customizable and can be set up with one or more configurable Processing Steps.				
Service	Last Run Time	Over	rview	
💩 🚺 Edit Se	ervice Actions		enabled, it will check for any new Custom Object Records that are registered.	
🔠 🕕 Run Se	B Run Service		enabled, it will check for any modifications to Custom Object Record field values.	
Enable Custom Object Record Service		ervice		

- 18. Clicking on Enable the Custom Object Record Service will activate the service. Once you upload your contacts to the CDO, the email will fire immediately (distributed within 15 minutes). Be sure you are ready to send the email before you enable this action or upload your data.
- 19. Once ready to go, upload your list to Custom Object > Upload Custom Object Records. During the upload it is important to NOT map data cards.

Custom Object	- 1	<u>Li</u>	
		Custom Object Record Fields	prting -
Test_CDO		Field Mapping	
Custom Object details	Copy Custom Object		
Display Name	Test_CDO	. Oustom Object Record Services	
Description	Example		
Туре	Custom Data Objects	2 New Custom Object Record	
Display Name Field	(none)	Deload Custom Object Records	
Unique Code Field (100 Character Limit)	(none)		
Email Address Field	(none)	View Custom Object Records	
Total Number of Custom Object Records	0 🦉 View Custom Object Rec	Search for Custom Object Recor	ds
Custom Object parameters		Check Dependency	
custom Object parameters			

20. You're done! The email will send to all records without adding them to the contact database. The Custom Object Record Service runs every 15 minutes. You can still report on your email send with the Email Analysis report.