

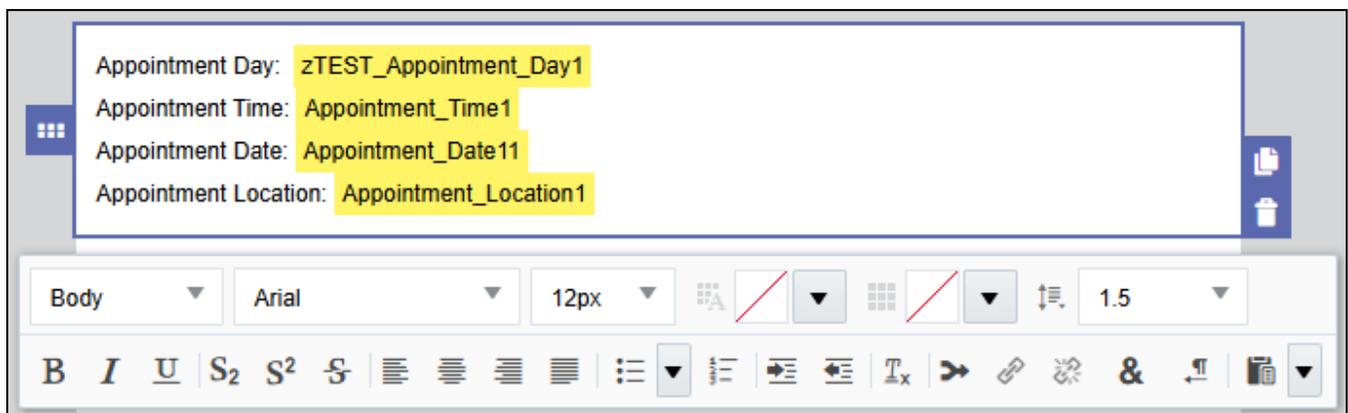


WebMD Ignite™

Eloqua

Merge Fields

via Custom Data Object



This document is a guide to help create and maintain Eloqua Merge Fields through a Custom Data Object (CDO).

Using Eloqua's CDO's and Merge Fields, you can dynamically automate various workflows with personalization for campaigns, responders, or internal processes.

The examples and illustrations below demonstrate an "Appointment Reminder" scenario, but the principles outlined can be applied to other scenarios as well.

Prerequisites

- **Oracle Eloqua Access** – Access to Oracle Eloqua to manage assets and components.
- **Custom Data Object Permissions** – Required to create and manage CDOs.
- **Merge Field Permissions** – Required to create and edit Merge Field components.
- **API User Permissions** (*If applicable*) – Required for advanced integrations or bulk data imports via Eloqua APIs.



Quick Guide

This is a brief summarized overview of the main steps to set up Eloqua CDO Merge Fields. For more detailed instructions of what each step entails, please skip to the [next section](#).

1. Create a CDO

Go to **Audience** → **Custom Objects**.

Click **Custom Objects** → **New Custom Object**.

2. Choose a maintenance strategy

● Form Submissions

Go to **Assets** → **Forms**, edit an appropriate Form.

Go to **Processing** → Add step: **Update Custom Data Object - With Form Data**.

Ensure “**Key Field**” and “**Key Field Mapping**” is “**Email Address**”

● Excel File Upload

Go to **Audience** → **Custom Objects**, choose the appropriate CDO.

Click **Custom Object** → **Upload Custom Object Records**.

Ensure “**Uniquely Match On**” is “**Email Address**”

Ensure “**Map Data Cards**” is “**Checked**”

● Automation Workflows

Automation options are broad and vary in complexity. Here are some avenues, but this guide will not go into detail since each case is particular to their unique requirements and scenarios.

- CRM Integrations
- Dynamic Form Submissions with business rules
- Event-based workflows
- Scheduled Cleanup Processes
- Scheduled Data Imports
- Third-party API Integrations

3. Create Merge Fields

Go to **Assets** → **Components** → **Field Merge**.

Click **Create**, set the “**Merge From**” option as “**Custom Object Record Field**”

4. Testing & Validation

Send or preview a test email to verify merge fields display correctly.

- All merge fields populate with accurate values.
- No placeholders (e.g., {CustomObject.AppointmentDate}) are visible.



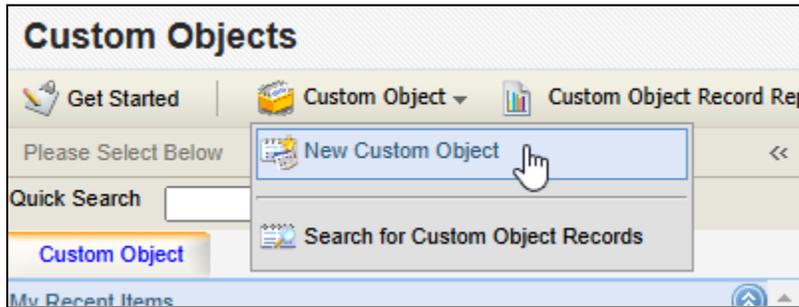
Step-by-Step Instructions

The following instructions reiterate and expand in more detail on the steps described in the Quick Guide section.

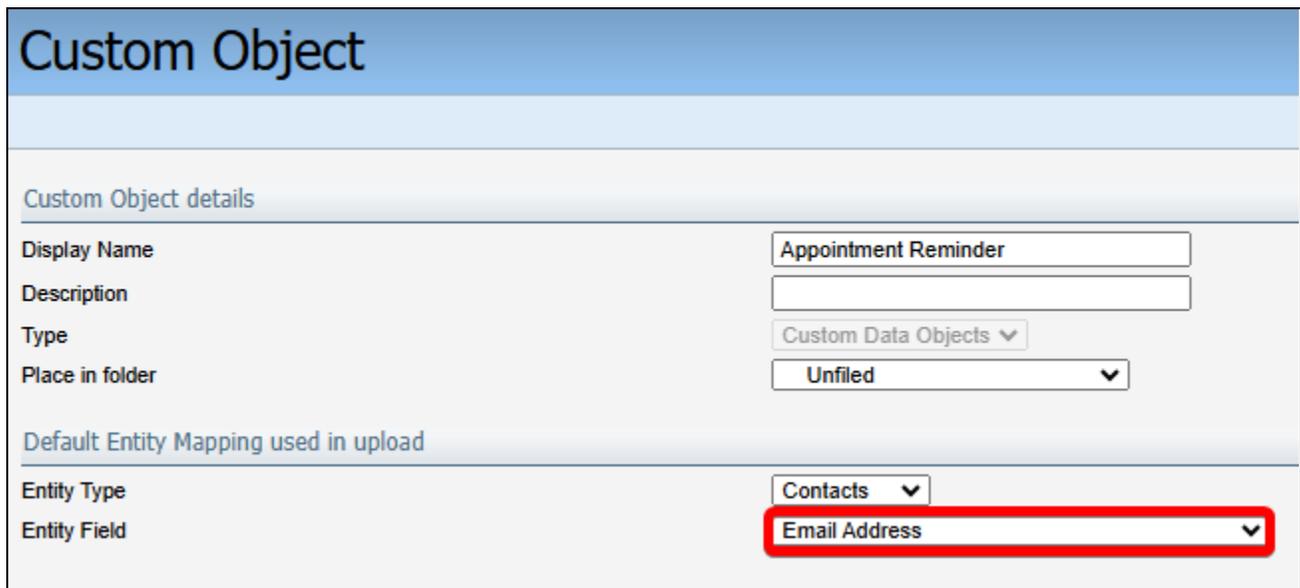
► Create a CDO

Go to **Audience** → **Custom Objects**.

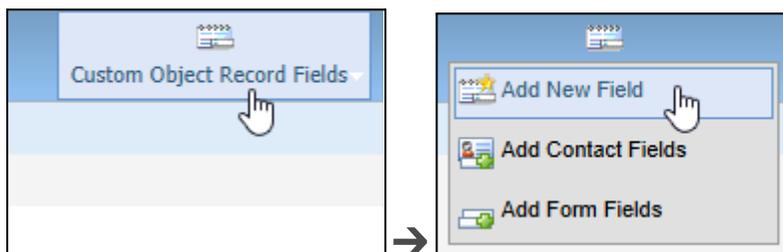
- Click **Custom Objects** → **New Custom Object**.



- Ensure “**Entity Field**” is “**Email Address**”



- Click **Custom Object Record Fields** → **Add New Field**.



- Define CDO Field characteristics, repeat for each needed.

⚠ The “Data Type” will become locked once the CDO is initially saved and cannot be changed.

Custom Object Record Field

Custom Object Record Field details

Field Name: Appointment Day

Data Type: Date / Time **!** Date Field (MM/DD/YYYY)

Field type used when editing a Custom Object Record: Textbox

Default Value:

Display After: (none)

Data Output Format: Wednesday (dddd)

- Review the Fields that will be available for Merge Fields.

Double-check that the “Data Type” is correct for each data point — Numbers are **Numeric**, Dates are **Date/Time**, answers that could be greater than 250 characters are **Large Text**.

Custom Object Record Fields

Appointment Reminder

- Custom Object Record Field
- ▼ Email Address
- ▼ Appointment Service
- ▼ Appointment Location
- ▼ Appointment Time
- ▼ Appointment Date
- ▼ Appointment Day

- Ensure “**Email Address Field**” is set to “**Email Address**”

⚠ The “Email Address Field” is crucial to enable Merge Fields — if tests fail, check this setting.

Custom Object

Appointment Reminder

Custom Object details

Display Name: Appointment Reminder

Description:

Type: Custom Data Objects

Display Name Field: (none)

Unique Code Field (100 Character Limit): (none)

Email Address Field: Email Address **!**

Total Number of Custom Object Records: 0 View Custom Object Record

► Maintenance Strategy

Choose a method or mixture of strategies to regularly update the CDO with new information.

via Form Submissions

- Go to **Assets** → **Forms**, create or edit an appropriate form.
- Go to **Processing** → **Add step: Update Custom Data Object - With Form Data**. Ensure the “*Email Address*” is assigned both within the “*Update Contacts...*” step as well as the “*Key Field Mapping*” (located in the @ symbol at the bottom of the Processing screen).

General Settings

Choose a Custom Object:
Appointment Reminder

Select the Key Field:
Email Address

Field Mapping

Source Field	Target Field
Appointment DateTime	Appointment Date
Location/Hospital	Appointment Location
Service Line	Appointment Service
Email Address	Email Address

All Fields Update Type: Always update

Key Field Mapping

Select the form field to use for contact matching for form processing steps

Form Field: Email Address Contact Field: Email Address

Never

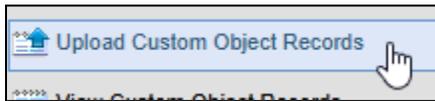
One-to-Many

If a single form field needs to inform multiple CDO fields, use multiple processing steps to update each CDO field individually. For example:

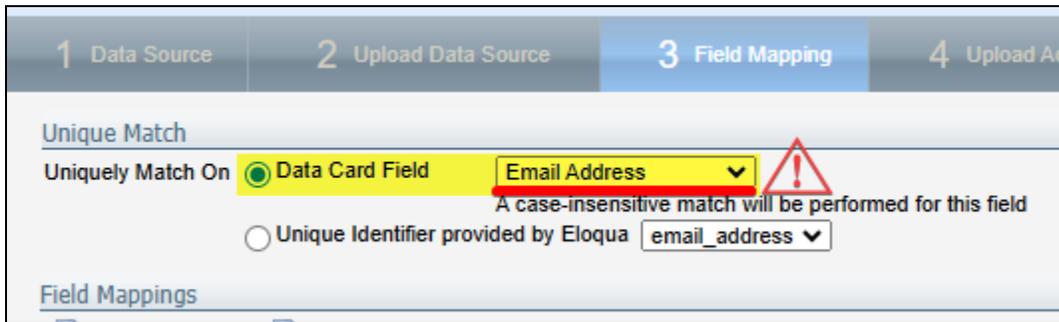
```
Form.Appointment Date ⇒ CDO.Appointment Day = "Wednesday"  
Form.Appointment Date ⇒ CDO.Appointment Time = "1:00 PM"  
Form.Appointment Date ⇒ CDO.Appointment Date = "12/11/2024"
```

via Excel File Upload

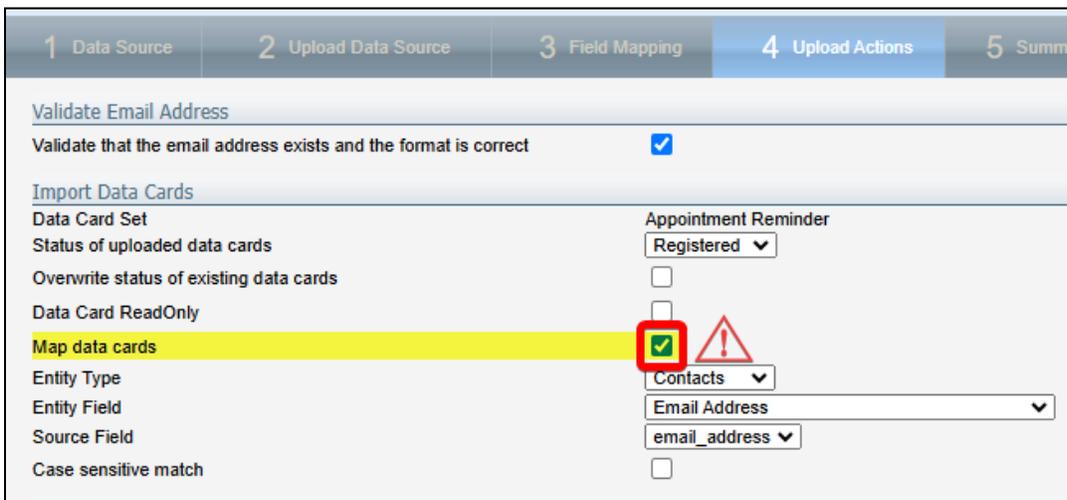
- Go to **Audience** → **Custom Objects**, choose the appropriate CDO.
- Click **Custom Object** → **Upload Custom Object Records**.



- On step 3, ensure the “**Data Card Field**” is set to “**Email Address**”.
⚠ If this setting is not assigned to the Email Address, mapping will likely fail.



- On step 4, ensure the “**Map Data Cards**” is enabled.
⚠ This is disabled by default and must be checked each time.



- **Complete the upload steps and Verify records.**

Return to the CDO and click “*View Custom Object Record*”.

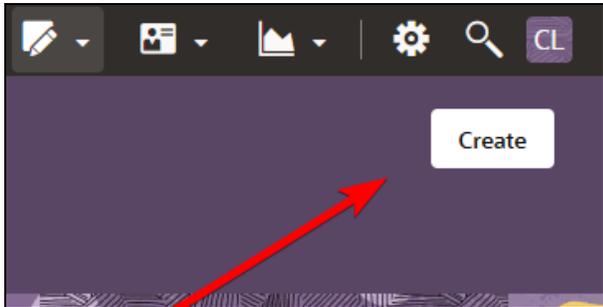


Observe the “*Mapped*” column that should state “*Yes*” for each record.

Data Card Search: Found 1 record(s)					Page 1 of 1
Name	UniqueCode	Status	Created Date	Mapped	
(97)	970197	Registered	12/11/2024 2:04:54 PM	Yes	

► Merge Fields

- Go to **Assets** → **Components** → **Field Merge**
- Click **Create** in the top-right corner of the screen



- Set the “**Merge From**” option as “**Custom Object Record Field**”, choose the appropriate “**Custom Object**” and “**Record Field**”.

Appointment Day	
Name Appointment Day	Default Value
Merge From Custom Object Fields	Custom Object Appointment Reminder
Custom Object Record Field Appointment Day	Select Object By Last Modified

Required

- Repeat for each merge field needed from the CDO.

► Testing & Validation

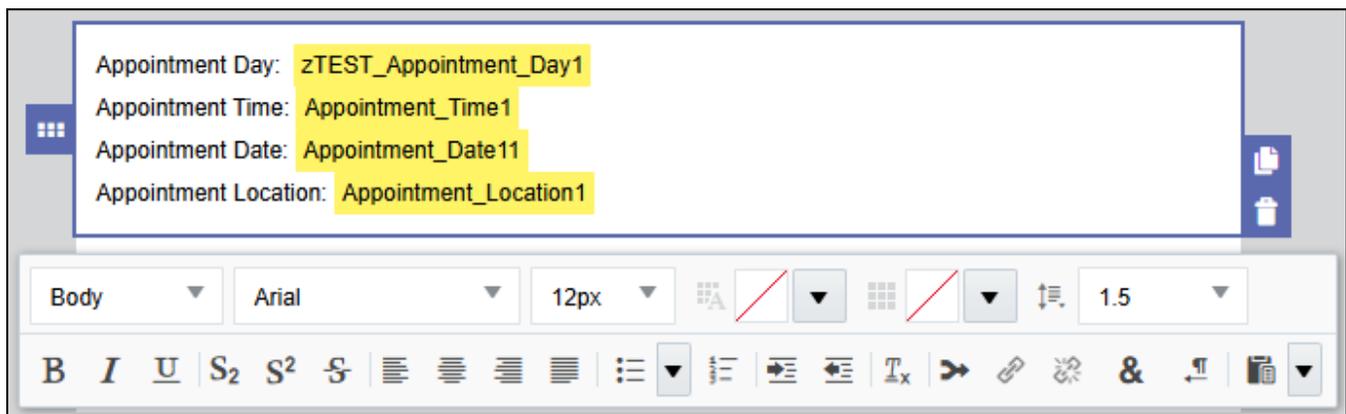
- **Preview a test email to verify merge fields display correctly**

Detailed explanation of the task.

- **Create or edit a Test Email**

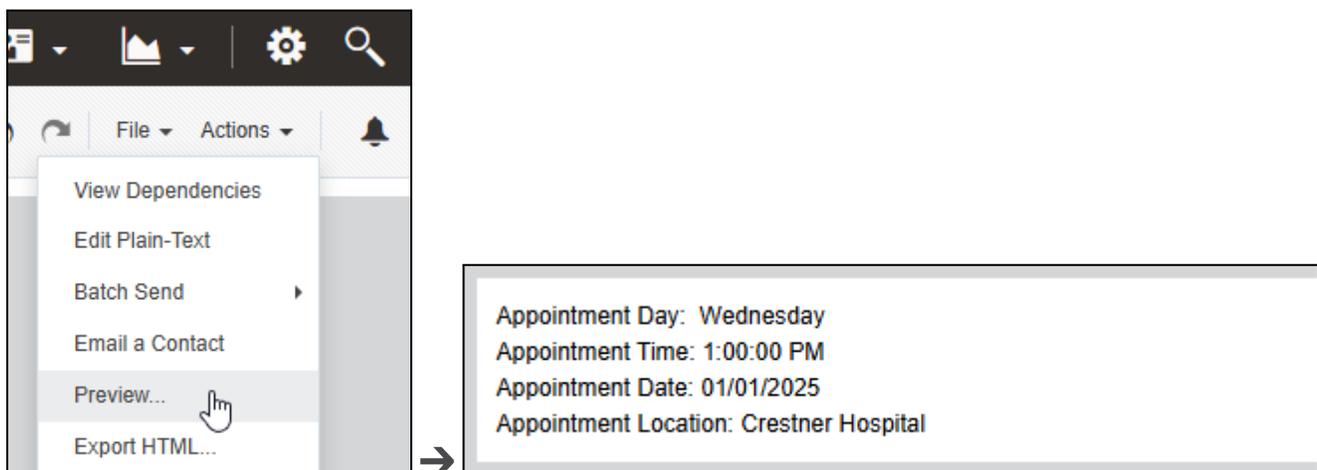
Add a Text component to the email template.

Within the Text component, insert the Merge Field(s).



- **Preview the email**

Open **Actions** → **Preview...** Search for a contact that is known to be in the Merge Field CDO. Confirm the merge field values appear and align with their labels.



► Manual CDO Entry

A Contact must exist prior to manually entering them into the CDO in order to be mapped.

Check that the Contact exists in [Audience](#) → [Contacts](#).

To map an individual CDO record after the fact,

1. Open the CDO
2. Click the “*View Custom Object Record*” button
1. Search for the “*Mapped*” equals “*No*”
3. Open a record and click the “*Map Custom Object Record*” button.
4. Repeat as necessary.

Alternatively, if the records in question were uploaded from an Excel file, re-uploading them with the appropriate settings should also cause them to be mapped en masse.

⚠ Once a record is mapped, it cannot be un-mapped.

► Merge Fields Not Populating

Verify a particular contact has a record in the CDO.

1. Go to [Audience](#) → [Contacts](#). Search for the contact in question.
2. Double-click the contact row to open the details screen.
3. Scroll to the “Linked records” column and verify the CDO appears in the dropdown.

Verify records in the CDO are “Mapped” to Contacts.

2. Open the CDO
3. Click the “*View Custom Object Record*” button
4. Search for the “*Mapped*” equals “*No*” – There should be none or very few.

Verify the merge field name exists and has not changed unexpectedly.

1. Go to [Assets](#) → [Components](#) → [Field Merge](#)
2. Confirm the merge field is assigned to the correct CDO and is pulling the expected CDO record field.

► Incorrect Data

Verify the merge field is assigned to the correct CDO and CDO fields.

1. Go to **Assets** → **Components** → **Field Merge**
2. Confirm the merge field is assigned to the correct CDO and is pulling the expected CDO record field.
3. Check for similarly named CDOs or Field Merges.

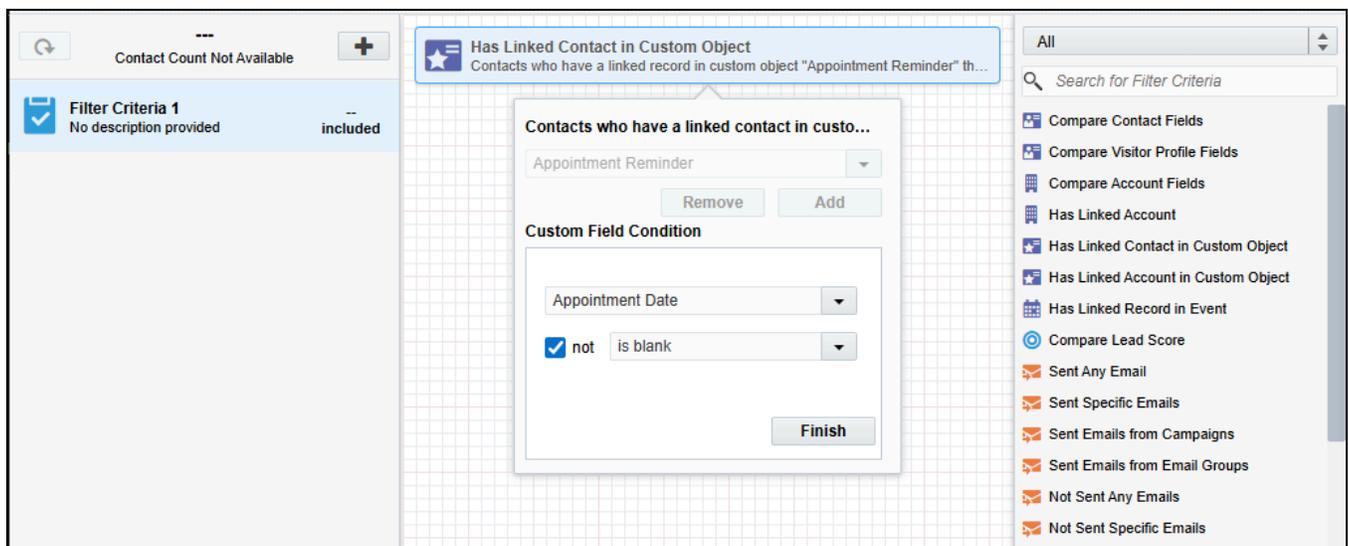
► Sends with broken or missing Merge Fields

Some workflows could be susceptible to situations where an email or other action could be initiated without the Merge Field for that contact being available for any reason.

Best practice in cases where the subject matter heavily relies on the Merge Fields working, and default values are not practical, use a segment filter with criteria to “qualify” downstream actions by measuring for the presence of the expected Merge Field value(s).

For example:

Contacts who have a linked contact in the CDO and the “Appointment Date” is not blank.



The screenshot displays a CRM interface for configuring filter criteria. On the left, a sidebar shows 'Filter Criteria 1' with 'No description provided' and 'included' status. The main area features a grid with a blue header 'Has Linked Contact in Custom Object' and a sub-header 'Contacts who have a linked record in custom object "Appointment Reminder" th...'. A modal window titled 'Contacts who have a linked contact in custo...' is open, showing a dropdown for 'Appointment Reminder' with 'Remove' and 'Add' buttons. Below, the 'Custom Field Condition' section has a dropdown for 'Appointment Date' and a checked 'not is blank' condition. A 'Finish' button is at the bottom. On the right, a list of filter criteria includes 'Compare Contact Fields', 'Compare Visitor Profile Fields', 'Compare Account Fields', 'Has Linked Account', 'Has Linked Contact in Custom Object', 'Has Linked Account in Custom Object', 'Has Linked Record in Event', 'Compare Lead Score', 'Sent Any Email', 'Sent Specific Emails', 'Sent Emails from Campaigns', 'Sent Emails from Email Groups', 'Not Sent Any Emails', and 'Not Sent Specific Emails'.

Eloqua Help Center Article

 [Configuring form processing steps](#)

Eloqua Help Center Article

 [Field Merges](#)

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 [Field Merge Examples](#)

Eloqua Help Center Article

 [Custom Objects](#)