



4THOUGHT MARKETING

CONTACT TO CO UPDATER

CLOUD APP DOCUMENTATION

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Purpose of the Contact to CO Updater Cloud App

There are situations where you need to create records in a Custom Object (CO) Set. This seemingly simple step is not that simple. In fact, it is not even possible to do using Oracle Eloqua's out of the box features. This is where this cloud action comes into play. With Contact to CO Updater you can create/update CO Records using contact data and static values.

CO Records are very useful for tracking purposes or any other process you can think of, with Contact to CO Updater you can automate your campaigns and stay on top of your Contacts' activities by creating COs.

This document will show how this Cloud Action can be used inside Campaign Canvas.



1) Set-up in Oracle Eloqua

Please follow these instructions to set-up this cloud action in your Oracle Eloqua instance.

1.1. Log in Oracle Eloqua as usual, it's recommended to check the box "Remember me".

1.2. Click the following link:

<https://login.eloqua.com/Apps/Cloud/Admin/Catalog/Add/a9b8d3cf-b291-4fe3-bca4-49c54792d19d/E6-D6-2D-50-9E-AA-5A-EC-A7-34-83-5D-37-CE-4E-CC>

NOTE: Sometimes, you're asked to log again, please do so if it happens.

1.3. In the following screen, click "Accept and Install" on the top-right section


The screenshot displays the configuration page for the 'Contact to CO Updater' cloud app. At the top right, there are icons for edit, download, settings, and delete, along with a 'Check Connection' button. The main content area includes the 4Thought Marketing logo and name, the website URL 'www.4thoughtmarketing.com', and contact information: Email 'appCloudPortal@4thoughtmarketing.com' and Phone '888 356 7824'. A description states: 'Will create or update a Custom Object based on the parameters you provide, including: Custom Object, Contact to CO Fields and static values (if any)'. Under the 'Services' section, there is one action listed: 'Action : Contact to CO Updater' with a description 'Create/Updates CO Records from Contact Data'.



1.4. In the next screen, click “Sign In” and then “Accept”


The following application has requested permission to access Eloqua on your behalf:

Contact to CO Updater




4Thought Marketing Cloud Apps

Will create or update a Custom Object based on the parameters you provide, including: Custom Object, Contact to CO Fields and static values (if any).



1.5. You’re all set. The cloud action is ready to be used.

AppCloud Catalog



Contact to CO Updater

Will create or update a Custom Object based on the parameters you provide, including: Custom Object, Contact to CO Fields and static values (if any).

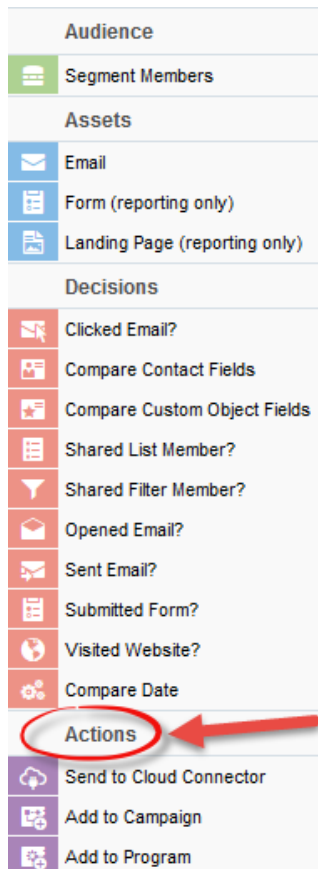
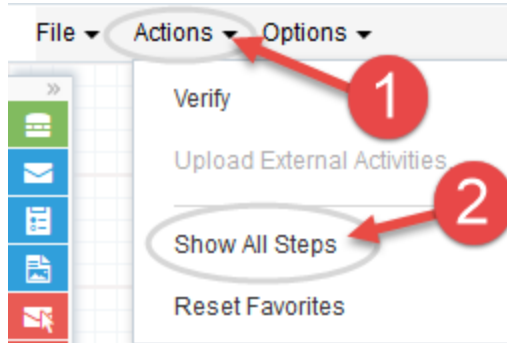


2) How to use

The following instructions show a basic/simple usage. You can incorporate this Cloud Action to any existing campaign.

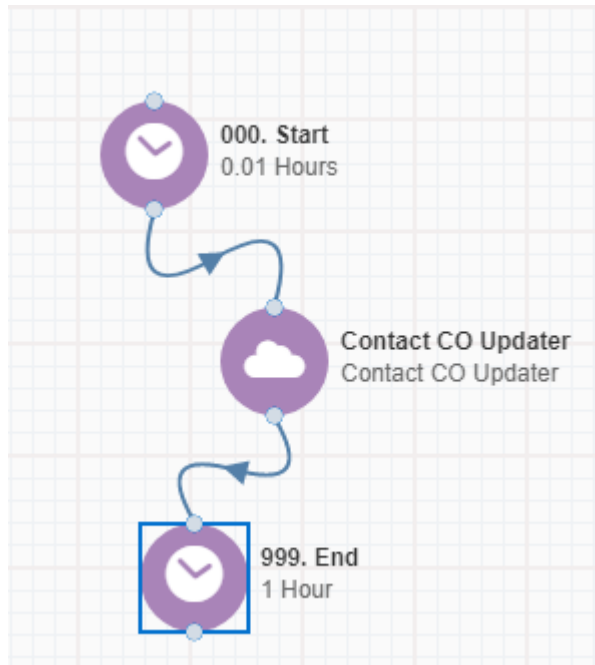
2.1 Create/Open a campaign

2.2 Click on “Actions” on the top left side then “Show All Steps” and then locate the “Contact to CO Updater” Cloud Action under the Actions options (colored in purple).



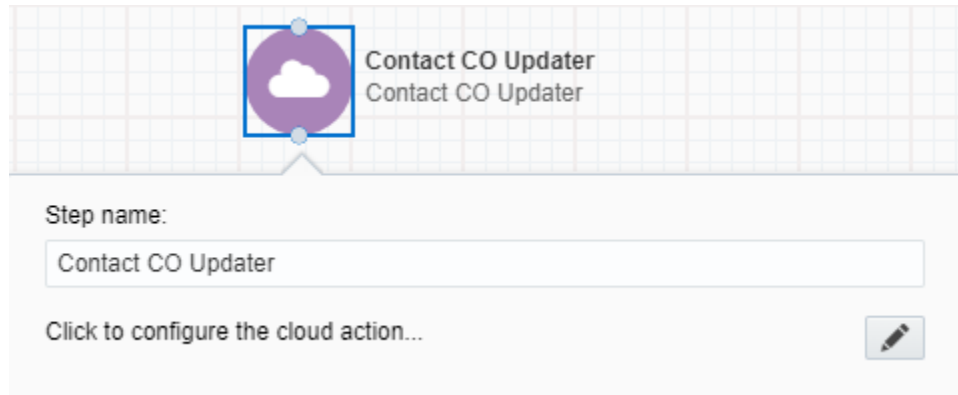


2.3 Drag and drop the cloud action to the canvas area. Connect the corresponding elements to the dropped cloud action



2.4 Double click the Contact to CO Updater step, you will see some options for this element.

- a. Rename the step if needed



- b. Click the pencil icon to open the settings for this step.

You will need a user to log in and configure this Cloud Action. If you don't have one, you can create one. If you do, use your user to Log In in the page shown in the following screenshot:



4Thought Marketing's App Cloud Portal

[Log in](#) [Register](#) [Reset Password](#)

Please enter your user information to log in.

Email address

Password

Remember me?
 By checking this box you accept our [Cloud Services Agreement](#)

[Don't have a Account?](#) [Did you forget your password?](#)

Questions? Comments? Ideas? 888-ELOQUA4 (888 356 7824) | Email us at appCloudPortal@4ThoughtCC.com | Copyright © 2009 - 2016 | All Rights Reserved.

- c. For this cloud action, you need to indicate the CO Set where the CO Records will be created.
- d. Then you need to specify the mapping from Contact fields to the CO Fields.
- e. After you've selected the field to use from the dropdowns, click "Add".
- f. Repeat these steps to add all the fields you need.
- g. When you're done adding fields to the mapping area, click "Save".
- h. Use the "Delete" button to remove a specific field from the mapping area.

Cloud Action Configuration

Update COs Linked To Contact

This app will update COs associated to one specific contact in one specified CO Set.

Configurations | Logs

Settings

Custom Object Set
--Select One--

Contact Field To **Custom Object Field**
--Select One-- ==>

Static Field

You're logged as [ksingh@4thoughtmarketing.com](#), click [here](#) to Log out.

Having issues? Click [here](#) to send us an email.

Questions? Comments? Ideas? 888-ELOQUA4 (888 356 7824) | Email us at appCloudPortal@4thoughtmarketing.net | Copyright © 2009 - 2017 | All Rights Reserved.



- i. Recommended: Create an element in the campaign in case an error happens, in this example it's a Wait Step. Check the box to "Automatically route contacts with errors from cloud app", select the step where you want the contacts to be routed.

Contact CO Updater
Contact CO Updater

Step name:
Contact CO Updater

Click to configure the cloud action...

Automatically route contacts with errors from cloud app

Choose a target step for contacts with errors:

998. Error
1 Day

Choose...

2.5 That's all. Activate the campaign, put some contacts in it and see the Contact to CO Updater in Action!



License Information




You need a license to configure and execute this Cloud App. Otherwise in the configuration page you will see the following error:

In order to use this Cloud Action, you need to purchase a license from 4Thought Marketing. Please contact our sales department at 888 356 7824, or click [here](#).

Additionally, if you happen to see records stuck in the Cloud App step, it may be due to a missing or expired License which you can get with your corresponding Account Manager.

Contact Us

If you have any questions or comments, feel free to reach us! Here are some ways:

Phone	888-ELOQUA4 (888-356-7824)	
Email	Support@4ThoughtMarketing.com	
Sales	sales@4ThoughtMarketing.com	
Website	http://www.4thoughtmarketing.com	