



# **4THOUGHT MARKETING**

## **CAMPAIGN MEMBERSHIP**

### **CLOUD ACTION DOCUMENTATION**

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## **Purpose of the Campaign Membership Cloud Action**

This app creates external activity records and campaign responses from a list upload. With the app, you can have a list with multiple contacts and multiple campaigns (one per contact), and it will create campaign responses for the campaign specified on each row.

This document will show how this Cloud Action can be used inside Custom Object (CO) Program 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, is recommended to check the box “Remember me”.

1.2. Click or Copy and Paste the following link:

<https://login.eloqua.com/Apps/Cloud/Admin/Catalog/Add/f199db7c-4016-4d4b-bbf-29731aec42c8/C3-01-EE-1D-6D-48-72-75-EA-6C-68-67-00-9C-F3-60>. Sometimes, you’re asked to log again, please do so if it happens.

1.3. In the following screen, click “Accept and Install”

### Campaign Membership

Accept and Install



#### 4Thought Marketing Cloud Apps

[www.4thoughtmarketing.com](http://www.4thoughtmarketing.com)

Email [support@4ThoughtMarketing.com](mailto:support@4ThoughtMarketing.com)

Phone 888 356 7824

Description Automates the process of uploading External Activities to Eloqua Campaigns. Custom Objects will be used to associate the linked Contacts to Eloqua Campaigns using the 'CRM Campaign ID' to perform a lookup vs the corresponding CO field.

#### Services



#### Action : Campaign Membership

Automates the process of uploading External Activities to Eloqua Campaigns. Custom Objects will be used to associate the linked Contacts to Eloqua Campaigns using the 'CRM Campaign ID' to perform a lookup vs the corresponding CO field.



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

The screenshot shows the Oracle Eloqua Marketing Cloud interface. At the top, the text "Oracle Eloqua Marketing Cloud" is displayed in a large, dark font. To the right of this text is a circular icon containing a gear and a hand. Below the header, a message states: "The following application has requested permission to access Eloqua on your behalf:". Underneath this message, the application name "Campaign Membership" is listed in bold. A description follows: "4Thought Marketing Cloud Apps Automates the process of uploading External Activities to Eloqua Campaigns. Custom Objects will be used to associate the linked Contacts to Eloqua Campaigns using the 'CRM Campaign ID' to perform a lookup vs the corresponding CO field." At the bottom of the screen, there are two buttons: "Sign In" and "Cancel".

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

### My Apps

The screenshot shows the "My Apps" section of the Oracle Eloqua Marketing Cloud interface. At the top, there is a search bar containing the text "campaign Mem" and a magnifying glass icon. To the right of the search bar is a link that says "Get More Apps". Further to the right, there is a "Sort by" dropdown menu currently set to "Name". Below the search bar, a single application is listed: "Campaign Membership". To the left of the application name is a small icon of the 4Thought Marketing logo. To the right of the name is a description: "Automates the process of uploading External Activities to Eloqua Campaigns. Custom Objects will be used to associate the linked Contacts to Eloqua Campaigns using the 'CRM Campaign ID' to perform a lookup vs the corresponding CO field."



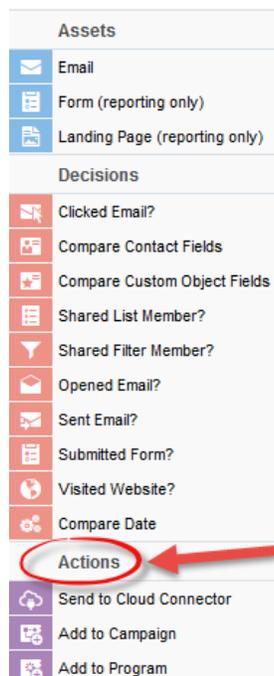
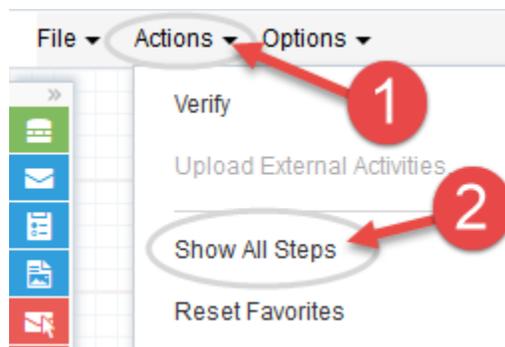
## 2) How to use

The following instructions show a basic/simple usage. You can incorporate this Cloud Action to any existing CO based Program Canvas.

**2.1** Create/Open a CO Program Canvas

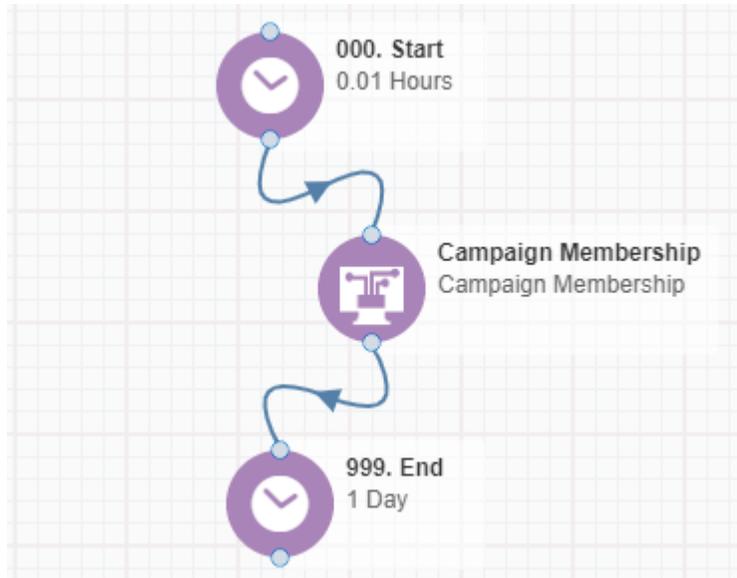
**2.2** Select the CO which you want to use in this process

**2.3** Click on “Actions” on the top left side then “Show All Steps” and then locate the “Campaign Membership” Cloud Action under the Actions options (colored in purple).



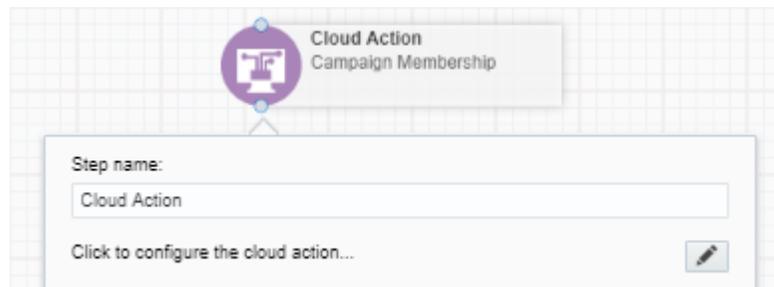


**2.4** Drag and drop the cloud action to the canvas area. Connect the corresponding elements to the dropped cloud action



**2.5** Double click the Campaign Membership step, you will see some options for this element.

**2.5.1** Rename the step if needed





**2.6** 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:

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The screenshot shows the login page for 4Thought Marketing's App Cloud Portal. At the top left is the 4Thought Marketing logo. To its right is the page title "4Thought Marketing's App Cloud Portal" and three links: "Log in", "Register", and "Reset Password". Below this is a grey box with the heading "Please enter your user information to log in." It contains two input fields for "Email address" and "Password". Below the password field are two checkboxes: "Remember me?" and "By checking this box you accept our [Cloud Services Agreement](#)". A "Log in" button is positioned below the checkboxes. At the bottom of the grey box are two links: "Don't have a Account?" and "Did you forget your password?". Below the grey box is a footer with the text: "Questions? Comments? Ideas? 888-ELOQUA4 (888 356 7824) | Email us at [appCloudPortal@4ThoughtCC.com](mailto:appCloudPortal@4ThoughtCC.com) | Copyright © 2009 - 2016 | All Rights Reserved."



## 2.7 For this cloud action, you can indicate the CO Fields to execute the Campaign

### Membership App.

- 2.7.1 Activity Date: Select the date field from the CO to add the date of the activity for the campaign response or else app will stamp the current date. Make sure the Activity Date is On or After the Campaign activated date.
- 2.7.2 Activity Name: Select the CO field where the app will find the Activity name, if the field is empty add the default value will be added.
- 2.7.3 CRM ID: Select the CO field where the CRM ID will be stored on the CO record. This will be used to run a lookup vs the Eloqua Campaign 'CRM ID' field. If after running a lookup, there's no matching Eloqua Campaign, the CO record will not be uploaded as a Campaign Membership. If this field is empty, the Membership will not occur for the corresponding CO Record.
- 2.7.4 Email Address: Select the CO field for the Email address, If the Email Address doesn't match an existing Eloqua Contact, one will be created.
- 2.7.5 Error Field: Select the CO field to capture the error, this field is optional. If there's an error creating a membership or with the previous values, it will be placed in this field. A blank value in this field means a successful Campaign Membership Upload.
- 2.7.6 External Asset Type: This CO field will contain the External Asset Type. Make sure that asset type you select is configured under Response Rules.
- 2.7.7 External Activity Type: This CO field will contain the External Activity Type. Make sure that activity type you select is configured under Response Rules.
- 2.7.8 Eloqua Email Notification: Configure this step by adding the email address to get the Email Notification on success or failure.



# Campaign Membership

Automates the process of uploading External Activities to Eloqua Campaigns. Custom Objects will be used to associate the linked Contacts to Eloqua Campaigns using the 'CRM Campaign ID' to perform a lookup vs the corresponding CO field.

Configurations **Logs**

### Important Considerations:

- Check the Eloqua Campaign's Start Date to be prior to the Membership Activity Date. For example:  
Campaign Start Date: 01 Jan 2017, Membership Activity Date: 02 Jan 2017
- Similarly, check the Membership Activity Date is before the Campaign's end date.
- Campaigns being 'Completed' will be skipped by this App

### Activity Date

If the CO field is empty, a date stamp will be added to both the CO and the External Activity. For example: 03/14/2019 06:44:22  
The date format should always be "MM/dd/yyyy".

09 Field A - DateTime (Dat) ▼

### Activity Name

If the CO field is empty, an Activity Name will be added to both the CO and the External Activity with this value: 'CM App 71330862-1438-455b-a651-26e86f61b7a9'.

01 Field A - Text (Text) ▼

### CRM ID

This will be used to run a lookup vs the Eloqua Campaign 'CRM ID' field.  
If after running a lookup, there's no matching Eloqua Campaign, the CO record will not be uploaded as a Campaign Membership.  
If this field is empty, the Membership will not occur for the corresponding CO Record.

GUID (Text)

### Email Address

If the Email Address doesn't match an existing Eloqua Contact, one will be created

Email Address (Text) ▼

### Error Field

Optional. If there's an error creating a membership or with the previous values, it will be placed in this field. A blank value in this field means a successful Campaign Membership Upload

Last Error (Text)

### External Asset Type

Make sure the External Asset Type you select is configured under 'Response Rules' [here](#)

Tradeshaw ▼

### External Activity Type

Make sure the External Activity Type you select is configured under 'Response Rules' [here](#)

Viewed a Demo

### Eloqua Email Notification

The specified email address will get an Eloqua notification (summary) with the results from the Import

ksingh@4thoughtmarketing.co

- Email On Success
- Email On Failure

Save Settings

Revert Changes

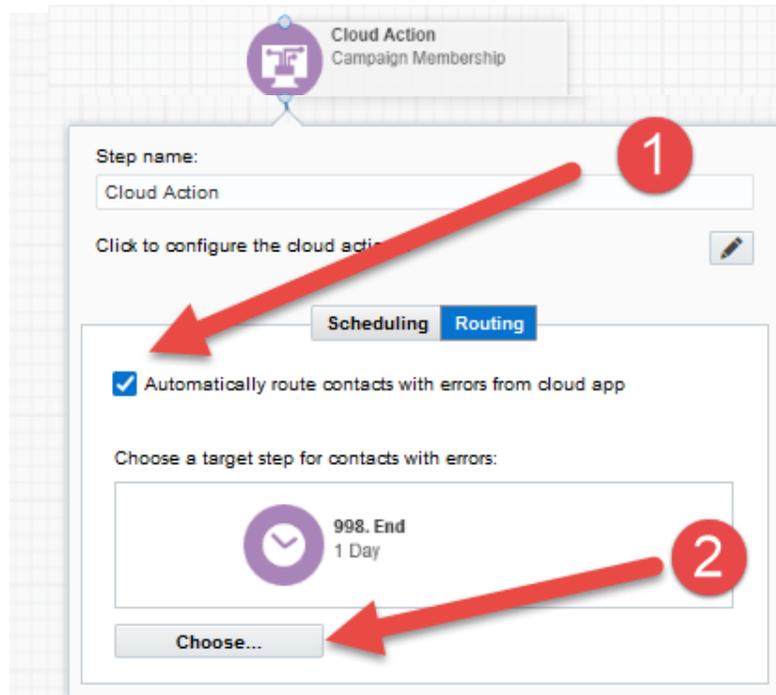
You're logged as ksingh@4thoughtmarketing.com, click [here](#) to Log out.

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

Questions? Comments? Ideas? ☎ 888 ELOQUA4 (888 356 7824) | Email us at [goeCloudPortal@4thoughtmarketing.net](mailto:goeCloudPortal@4thoughtmarketing.net) | Copyright © 2009 - 2019 | All Rights Reserved.



**2.8 Recommended:** Create an element in the program 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.





## 2.9 Logs Tab: This section shows the execution logs for the respective cloud app

Configurations **Logs**

This section will show the executions Logs for this Cloud App. Logs older than 2 months will be deleted.

Show

Within the following timeframe  and

No logs to display, select a criteria from above and click 'Get Logs'.

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](mailto:appCloudPortal@4thoughtmarketing.net) | Copyright © 2009 - 2019 | All Rights Reserved.

2.9.1 **Show:** Here you can select what type of log you want to see, it gives you an option to select "All logs", "Successful logs only", "Failed logs only"

2.9.2 **Within the following timeframe:** This field allows you to select the timeframe to view the execution logs.

**Note:** You can view up to 2 months older logs only

Configurations **Logs**

This section will show the executions Logs for this Cloud App. Logs older than 2 months will be deleted.

Show **1**

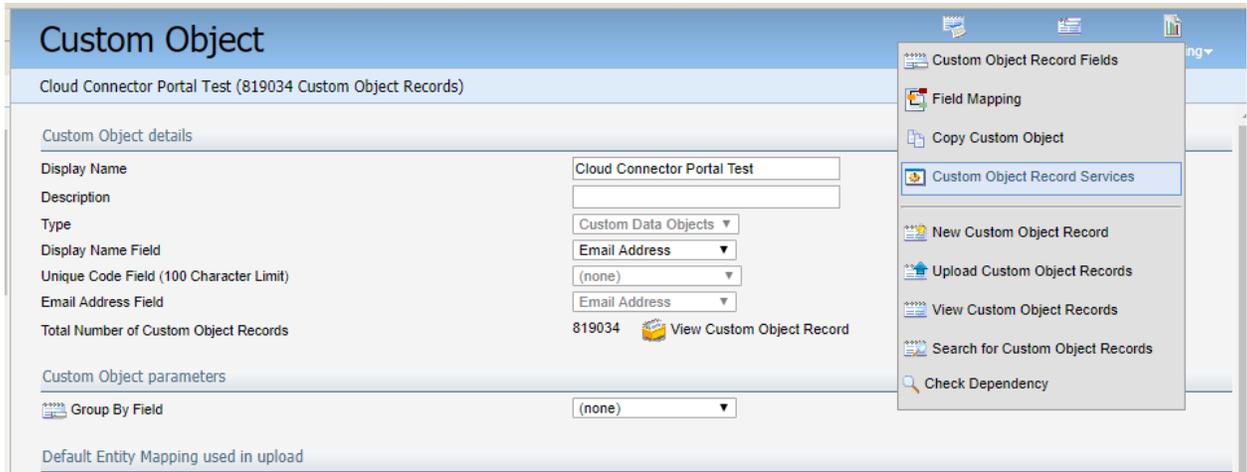
Within the following timeframe  and  **2**

Total Records	Success	Failed	Entry Date	End Date	Message
1	1	0	01/18/2019 14:24:10	01/18/2019 14:24:14	4Thought Marketing App Re-Processed.



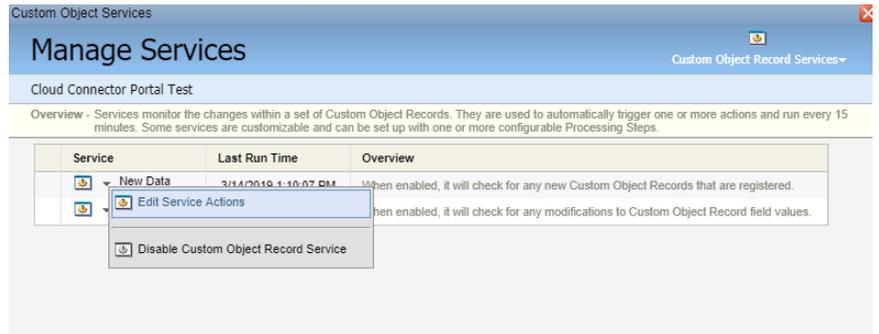
## 2.10 How to Configure the CO to Feed New Contact to Program

- 2.10.1 CO Program can only be feed by the records which are already present in the CO, so you need use Custom Object Services of the CO (which you have selected in the Program, with all the fields mentioned in step 2.7) to feed the records into the program
- 2.10.2 Add the Listener Step and add it to the starting of the Program and Click on save
- 2.10.3 Open the CO which you have selected in the Program, select the Custom Object Services as shown in below snapshot

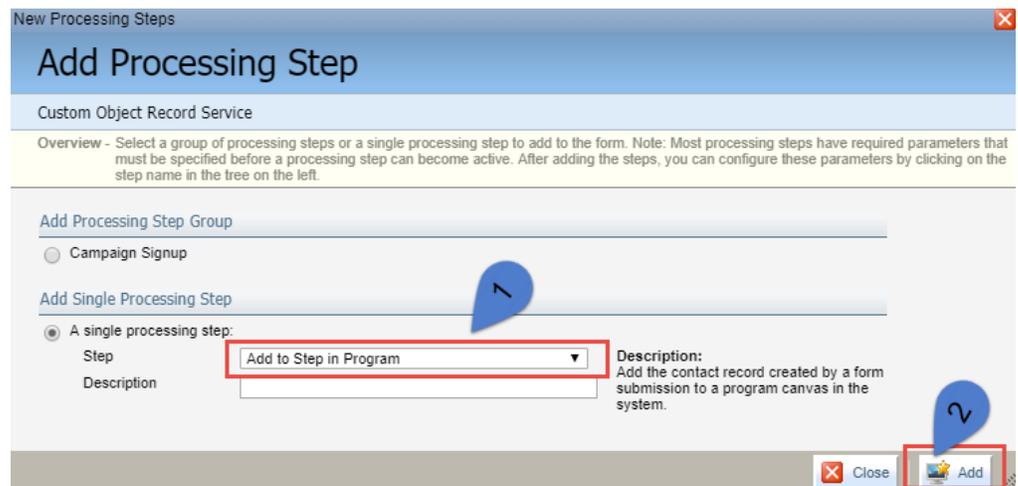


- 2.10.4 Click on "**Custom Object Services**" step to configure

- 2.10.4.1 Select the "New Data" this service will feed every new record added in the CO and then select "Edit Service Actions"



2.10.4.2 Click on "Add Processing Steps" and select the "Add to Step in Program" and then click on "Add" as shown in below snapshot



2.10.4.3 Select the Program Listener Step and click on "Save and Close" as shown in below snapshot



**Edit Processing Step**

Add to Step in Program For **New Data**

**Alert!** - This processing step has been added recently and its required parameters are not yet set. Please specify these parameters and click 'Save' to enable the step.

Name	Source Type	Value
Entity Type	Constant	Custom Object Records

**Conditional Parameters**

Add all the parameters needed for this Entity Type

Name	Source Type	Value
Program Canvas Step	Constant	4TM App Campaign Membership(Id.79): listener

**Optional Parameters**

Name	Source Type	Value
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**This Processing Step Gets Executed**

Always

Only if the following Condition is met:

12 Field B - Numeric value Is [ ] [ ] [ ] Search Builder

When the following Data Lookup criteria [ ] met:

Once you have selected a Data Lookup criteria you must map form fields to the Data Lookup engine in order to properly validate.

2018 GDPR CO Records [ ] Edit [ ] New [ ]

Map Form Fields [ ]

Never

Close Save and Close Save

## 2.11 How to upload Records/list to the CO

- 2.11.1 Select the Custom Object (which you have selected in the Program, with all the fields mentioned in step 2.7)
- 2.11.2 Click on Custom Object option in the top right side and select Upload Custom Object Record as shown in below snapshot

**ORACLE Eloqua**

Custom Objects

Cloud Connector Portal Test (819034 Custom Object Records)

Custom Object details

Display Name: Cloud Connector Portal Test

Description: [ ]

Type: Custom Data Objects

Display Name Field: Email Address

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

Email Address Field: Email Address

Total Number of Custom Object Records: 819034

View Custom Object Record

Custom Object parameters

Group By Field: (none)

Default Entity Mapping used in upload

Entity Type: Contacts

Entity Field: Email Address

Header Fields: [ ]

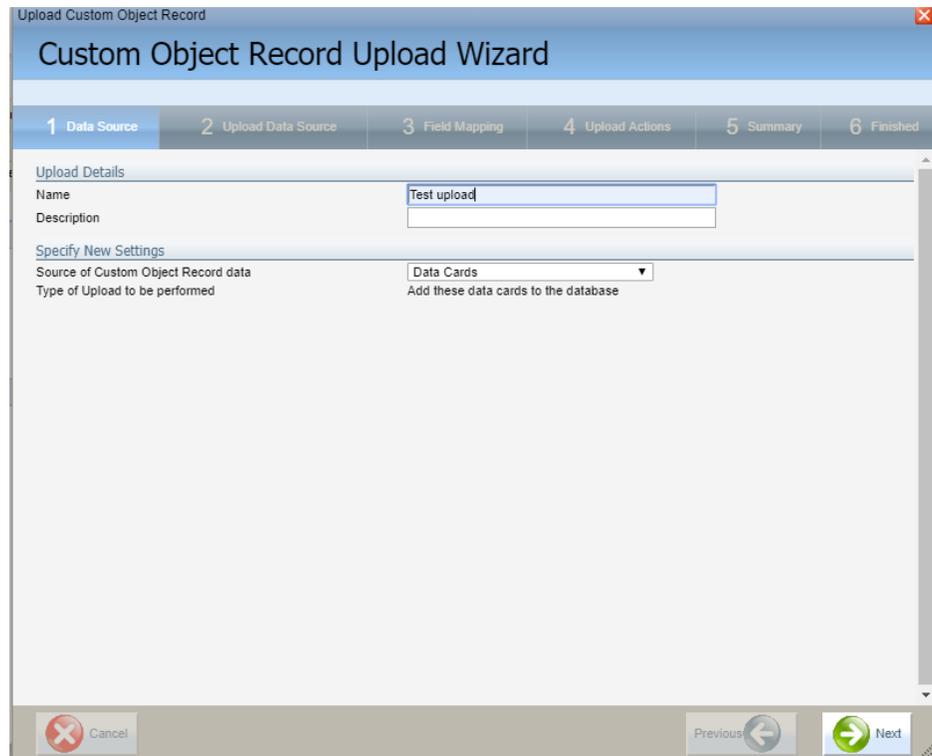
Save

Custom Object Record Fields

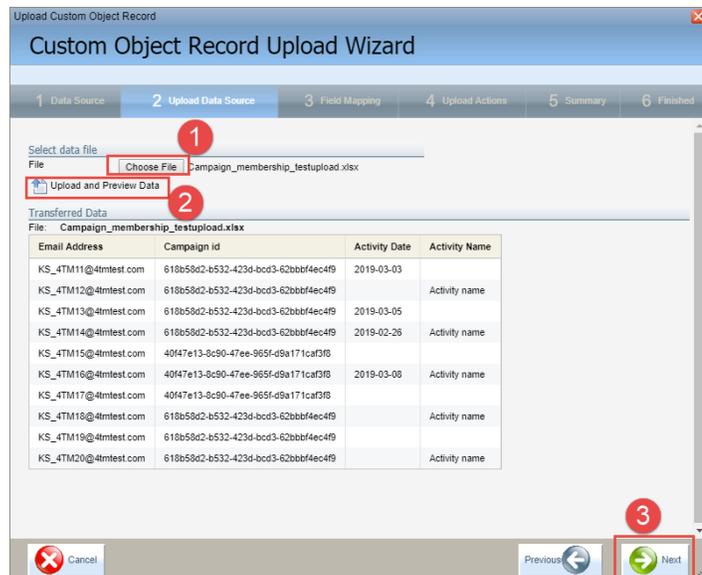
- Field Mapping
- Copy Custom Object
- Custom Object Record Services
- New Custom Object Record
- Upload Custom Object Records**
- View Custom Object Records
- Search for Custom Object Records
- Check Dependency



### 2.11.3 Name you upload as per your requirement and Click on Next



### 2.11.4 First Click on Choose File and select the file that you want to upload after that Click on Upload and Preview Data as shown in below snapshot. Now Click on Next





2.11.5 Map the source fields with CO fields exactly that you have selected in Cloud App Configuration Panel and then click on Next

Source Field	To	Target Field
Email Address	→	Email Address
Campaign id	→	GUID
Activity Date	→	09 Field A - DateTime
Activity Name	→	01 Field A - Text

2.11.6 Check on Map data Cards checkbox, so that it will also create the Contact record if Contact is not in the contact table. Once selected Click on Next.

Section	Option	Value/Status
Validate Email Address	Validate that the email address exists and the format is correct	<input checked="" type="checkbox"/>
	Import Data Cards	
Data Card Set	Cloud Connector Portal Test	
Status of uploaded data cards	Registered	
Overwrite status of existing data cards		<input type="checkbox"/>
Data Card ReadOnly		<input type="checkbox"/>
Map data cards		<input checked="" type="checkbox"/>
Entity Type	Contacts	
Entity Field	Email Address	
Source Field	Email Address	
Case sensitive match		<input type="checkbox"/>
Add Data Cards to Program Step	Program Step	(none)



### 2.11.7 Review the summary of upload, and click on Finish

Choice	Value
Name	Test upload
Description	Data Cards uploaded by Kaushal Singh on 3/27/2019 3:59:47 AM (UTC-05:00) Eastern Time (US & Canada)
Data Upload Source	Data Cards File: Campaign_membership_testupload.xlsx
Upload Purpose	Add these data cards to the database
Validate Email Address	Perform Email Address Validation on Uploaded Data: Yes
Import Data Cards	Data Card Set: Cloud Connector Portal Test
	Status of uploaded data cards: Registered
	Overwrite status of existing data cards: False
	Data Card ReadOnly: False
	Map data cards: True
	Entity Type: Contacts
	Entity Field: Email Address
Source Field: Email Address	
Case sensitive match: False	

Notification Email

Send a success or failure notification email to

After Uploading

Run once using these settings

Save these settings for re-use

Buttons: Cancel, Previous, Finish (highlighted)

2.11.8 Now Close the section by clicking on the red cross at the top right of the box

2.11.9 That's it, CO services runs in every 15 min means after 15 min the records will feed to the Program.

That's all. Activate the Program.



## 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 Action 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	<a href="http://www.4thoughtmarketing.com">http://www.4thoughtmarketing.com</a>	