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-bbfb-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"

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

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

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).
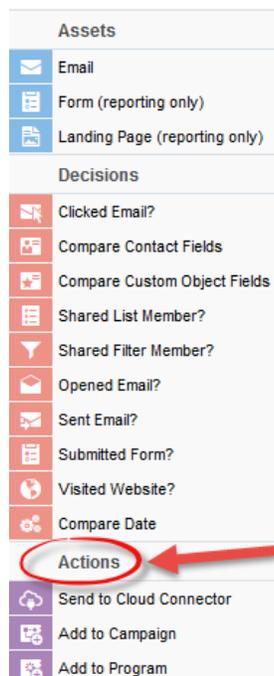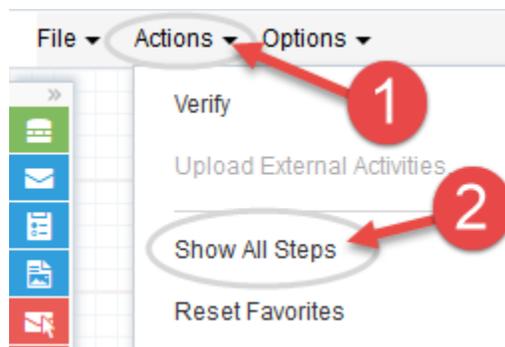
2.4 Drag and drop the cloud action to the canvas area. Connect the corresponding elements to the dropped cloud action
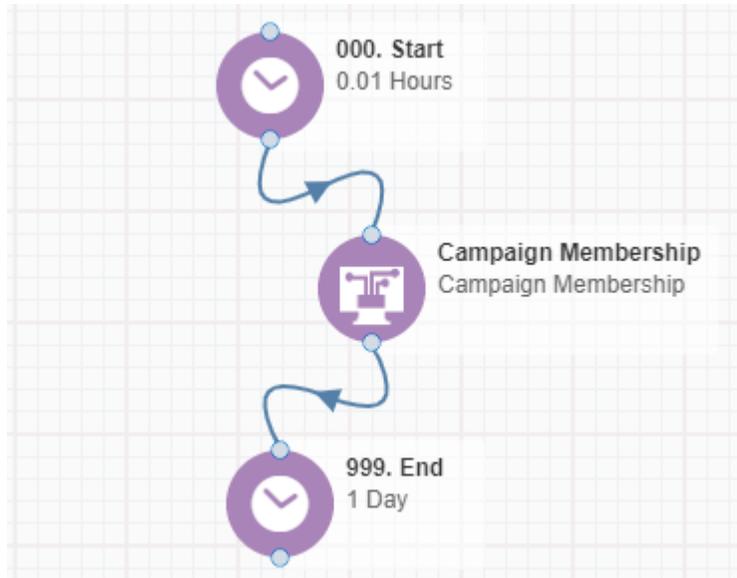
2.5 Double click the Campaign Membership step, you will see some options for this element.

2.5.1   Rename the step if needed
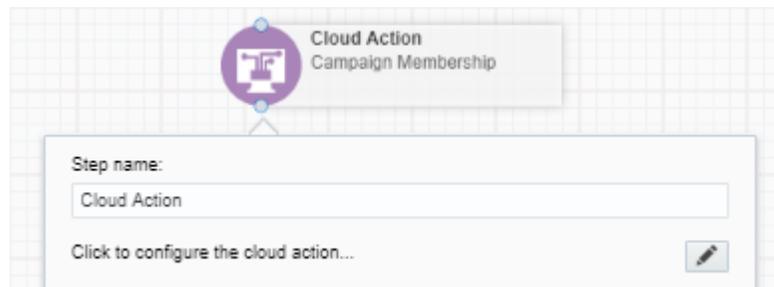
2.6 Click the pencil icon to open the settings for this step.

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:

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.

Cloud Action Configuration

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-a651-26c86f61b7a9**".

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

Tradeshow ▼

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 appCloudPortal@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.
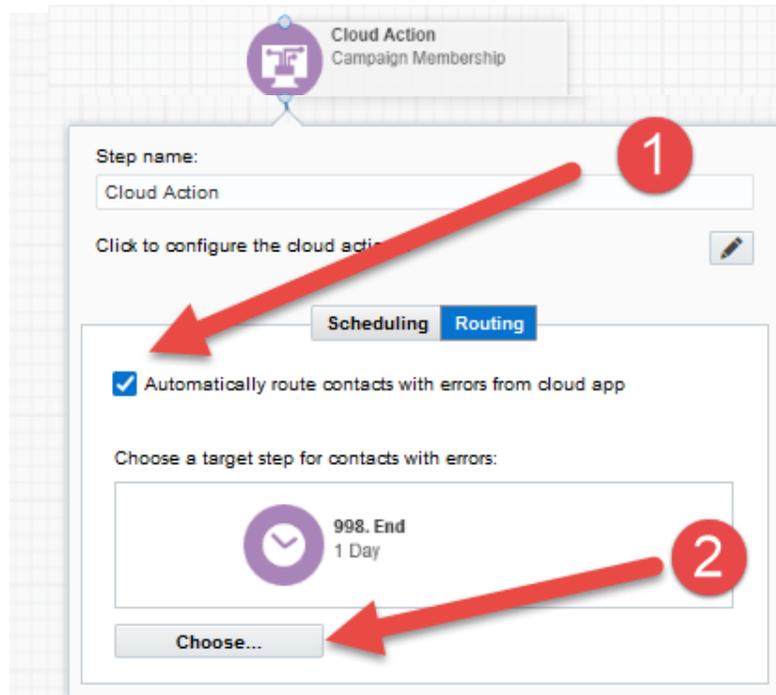
2.9 Logs Tab: This section shows the execution logs for the respective cloud app

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

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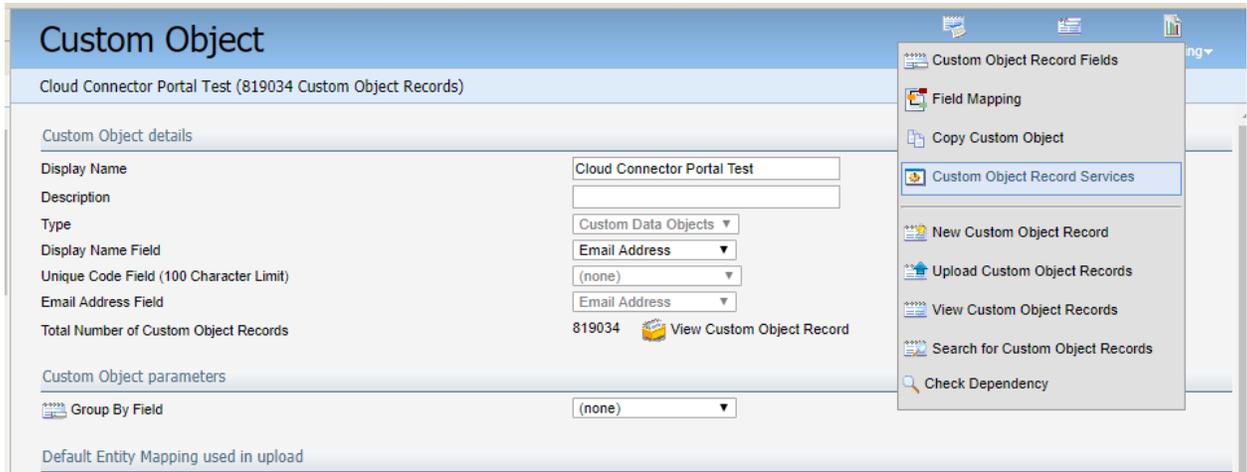
2.10.4 Click on "**Custom Object Services**" step to configure

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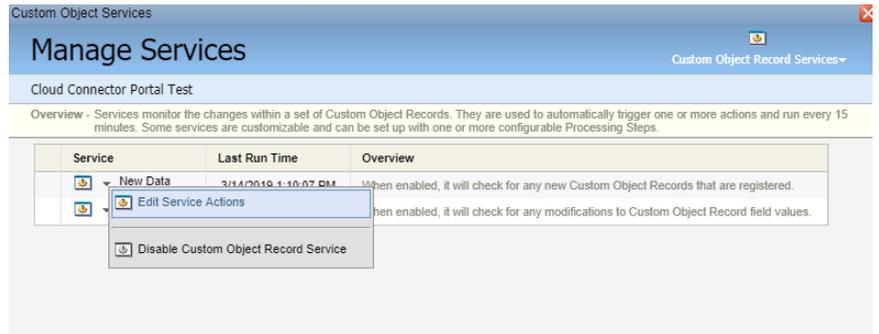
2.10.4.2 Click on "Add Processing Steps" and select the "Add to Step in Program" and then click on "Add" as shown in below snapshot
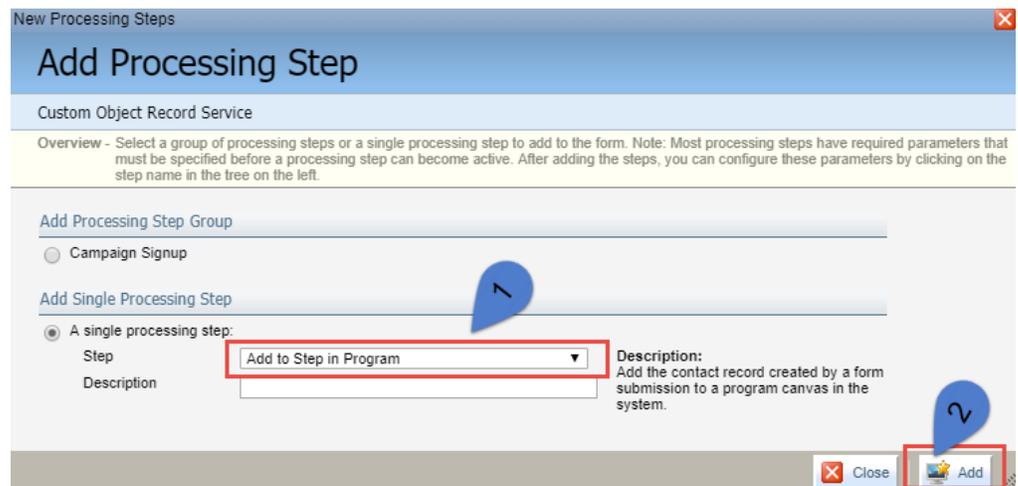
2.10.4.3 Select the Program Listener Step and click on "Save and Close" as shown in below snapshot

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

2.11.3   Name you upload as per your requirement and Click on Next
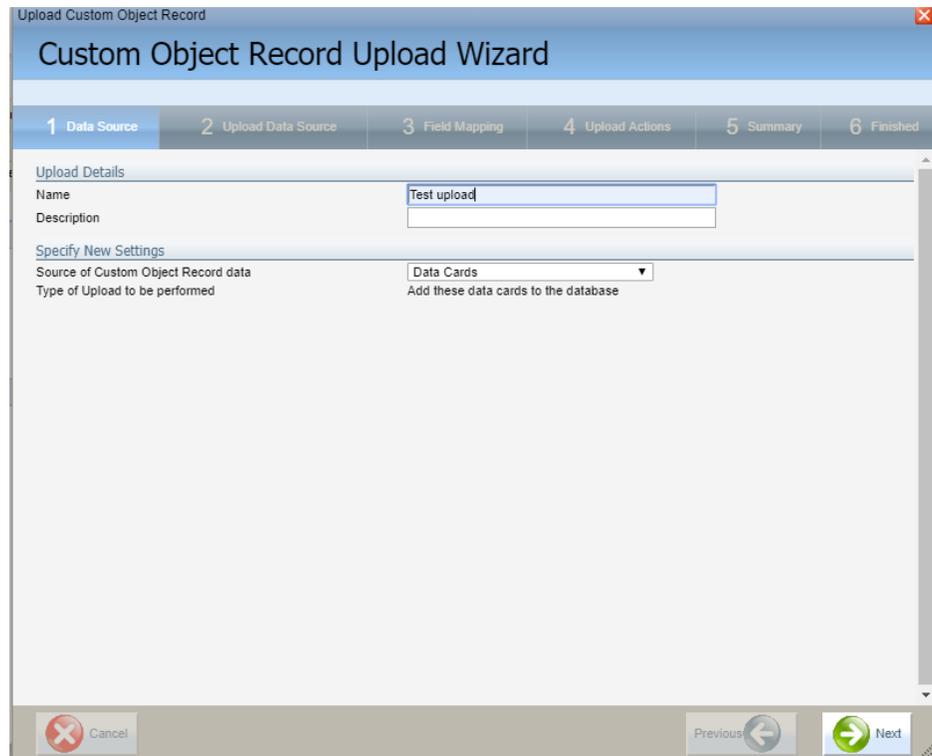
2.11.4   First Click on Choose File and select the file that you want to upload after

that Click on Upload and Preview Data as shown in below snapshot. Now

Click on Next
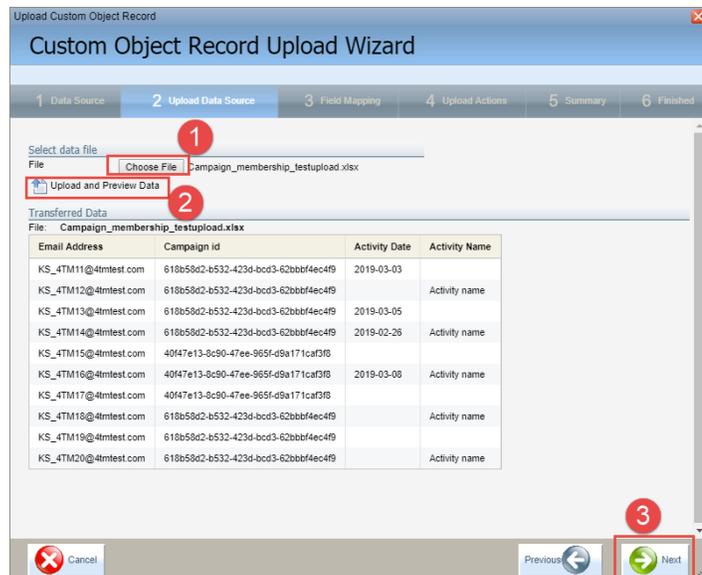
2.11.5 Map the source fields with CO fields exactly that you have selected in Cloud

App Configuration Panel and then click on Next

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.

2.11.7 Review the summary of upload, and click on Finish

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	http://www.4thoughtmarketing.com	