



# 4THOUGHT MARKETING

## CANVAS ENHANCED UPDATE RULES

### CLOUD APP DOCUMENTATION

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## **Purpose of the Canvas Enhanced Update Rules Cloud Action**

There are situations where you need to update contact fields with either custom information, date stamps or append a value to certain fields. This is a simple step to do, but not when you have tens or hundreds of records to update. This is where this cloud action comes into play. With Canvas Enhanced Update Rules you can update contacts using custom data and static values.

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/752291e1-d5ce-4476-aec9-3a8d67f95a6f/CA-56-56-46-30-49-88-AC-43-37-AA-24-51-3F-BA-79>. 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


**Field Length Indicator** Accept and Install

 **4Thought Marketing Cloud Apps**  
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Phone: 888 356 7824

Description: Compare the length of the value of the specified field (e.g. Company) with a pre-determined value to decide if the value in the field is less than the desired length of the field

**Services**

 **Decision : Field Length Indicator**  
This App determines if a field-value has a certain length

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



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

### Canvas Enhanced Update Rules



4Thought Marketing Cloud Apps

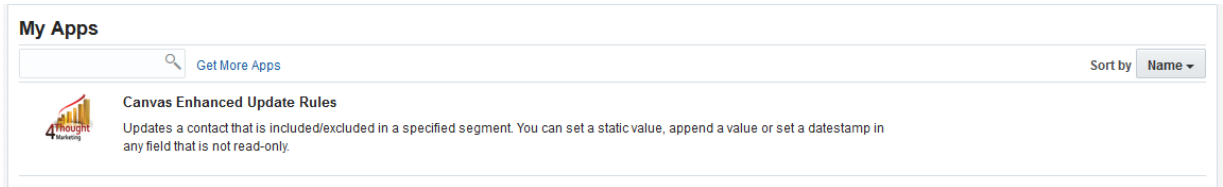
Updates a contact that is included/excluded in a specified segment. You can set a static value, append a value or set a timestamp in any field that is not read-only.

Sign In

Cancel



1.5. You're all set. The Cloud Decision is ready to be used.

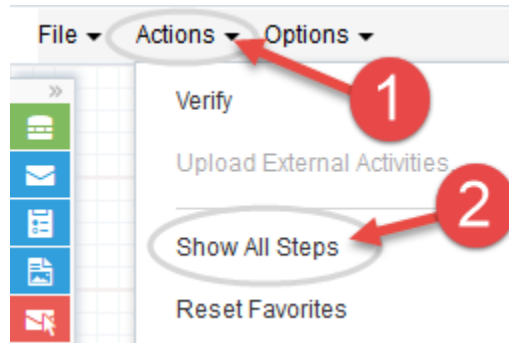


## 2) How to use



















The following instructions show a basic/simple usage. You can incorporate this Cloud Action to any existing 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 "Canvas Enhanced Update Rules" Cloud Action under the Actions options (colored in purple).

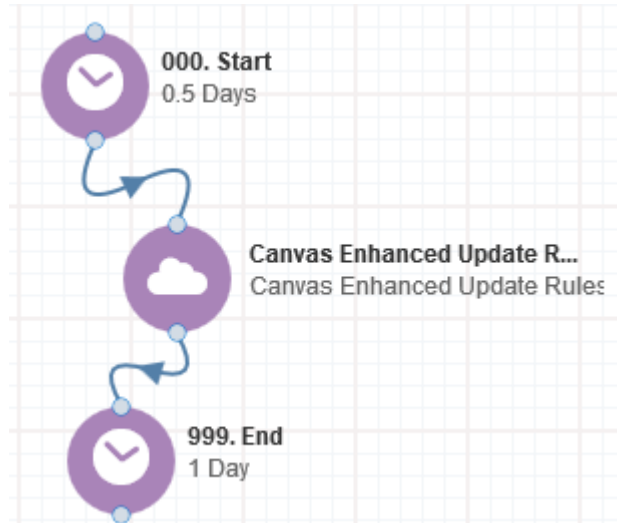




Audience	
	Segment Members
Assets	
	Email
	Form (reporting only)
	Landing Page (reporting only)
Decisions	
	Clicked Email?
	Compare Contact Fields
	Compare Custom Object Fields
	Shared List Member?
	Shared Filter Member?
	Opened Email?
	Sent Email?
	Submitted Form?
	Visited Website?
	Compare Date
	Actions
	Send to Cloud Connector
	Add to Campaign
	Add to Program

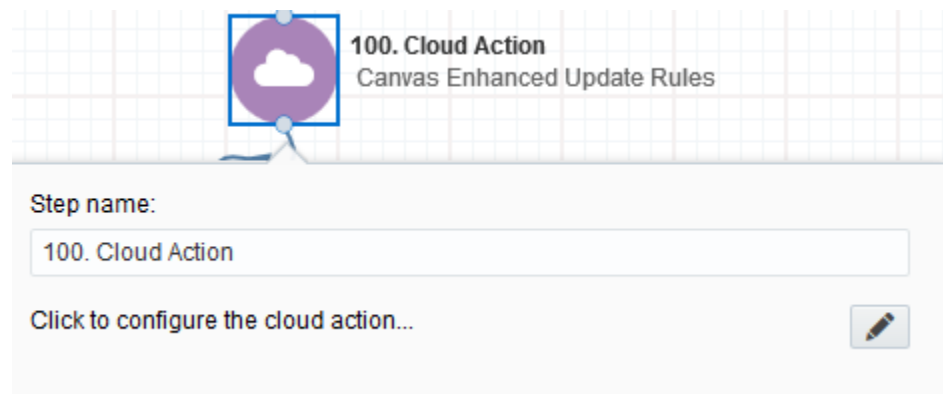


2.3 Drag and drop the cloud action to the canvas area. Connect the corresponding elements to the dropped cloud action



2.4 Double click the Canvas Enhanced Update Rules 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](#)

**Log in**

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

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

a) For this cloud action, you need to indicate if the contacts you want to update should be part or excluded from a Segment. Optionally you can add the contacts to a Shared list.

b) Afterwards you need to specify the update rules you're going to use. There are 3 types:

- i. Append static value: for this rule you need to select the field you want to update and a value to append to the value set in that field. Optionally you can use a delimiter to separate the appended part from the original.
- ii. Apply date stamp: This update rule is used to set a date stamp to a date field. You only need to select the field you want to update and the Cloud Action will use the appropriate format for it. Take into consideration that only when sending an email or sending information to the CRM System you will see the formatted value. In all other cases the value of the field will use the normal format of MM/DD/YY HH:mm:ss.
- iii. Set static value: this update rule will overwrite the value of the field with the custom text you set.



After adding the required rules you need to save. Otherwise the rules won't be applied. Also you can use the trash button to remove a rule from the mapping area.

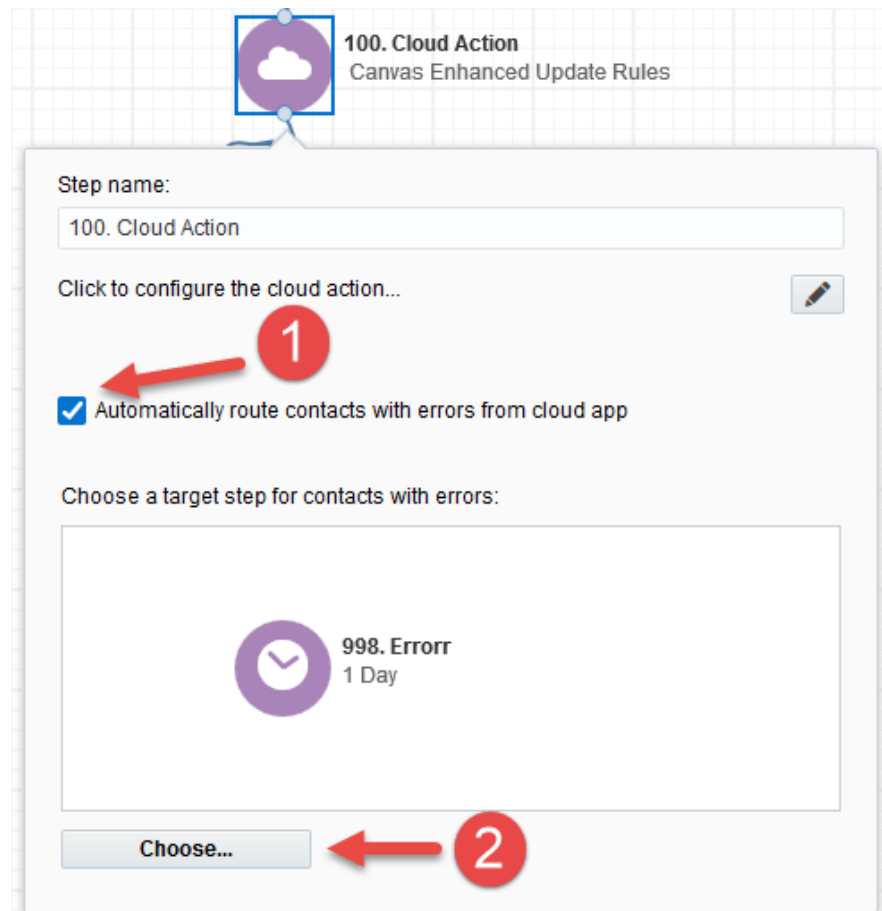
The screenshot shows the 'Canvas Enhanced Update Rules' configuration page. At the top left is the 4Thought Marketing logo. The page title is 'Canvas Enhanced Update Rules'. Below the title are two tabs: 'Configurations' (selected) and 'Logs'. The main content area is divided into two sections: 'Filtering settings' and 'Update Contact Record'.  
In the 'Filtering settings' section, there is a checkbox for 'Check Contact's membership' which is checked. Below it are three dropdown menus: 'If the Contact is' (with '- Select One Condition -'), 'within Segment' (with '- Select One Segment -'), and 'Add to Existing Shared List (Optional)' (with '- Select One List -').  
The 'Update Contact Record' section contains a table with four columns: 'Update Rule', 'Contact Field', 'Value', and 'Add'. The first row has dropdown menus for 'Update Rule' and 'Contact Field', a text input for 'Value', and a plus sign in the 'Add' column. Below this is a section titled 'Current Rules' with a table header: 'Update Rule', 'Field', 'Value', and 'Action'. At the bottom of the form are two buttons: 'Save Settings' and 'Revert Changes'.

c) **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.



2.5 That's all. Activate the campaign, put some contacts in it and see the Canvas Enhanced Update Rules 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 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:

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Website <http://www.4thoughtmarketing.com>

