



# 4THOUGHT MARKETING

## CO TO CONTACT UPDATER

### CLOUD APP DOCUMENTATION

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## Purpose of the CO to Contact Updater Cloud Action

There are situations where you need to move data from a Custom Object (CO) Record to its linked Contact Record. This simple step is not that simple or even possible using Oracle/Eloqua's out of the box features. This is where this cloud action comes into play. With CO to Contact Updater Cloud Action you can update Contact Records using linked CO data.

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



## 1) Set-up in Eloqua

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

1.1. Log into Eloqua as usual.

1. Click the following link:

<https://login.eloqua.com/Apps/Cloud/Admin/Catalog/Add/143d319f-710f-448b-b4b7-e8bb67fc2f4e/E3-E6-F0-CF-90-12-03-78-17-4A-F8-13-AE-FC-08-57>

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

1.2. In the following screen, click "Accept and Install"

**CO to Contact Updater** Accept and Install

**4Thought Marketing Cloud Apps**  
www.4thoughtmarketing.com

Email [appCloudPortal@4thoughtmarketing.com](mailto:appCloudPortal@4thoughtmarketing.com)  
Phone 888 356 7824

Description Allows you to update Contact Records using linked CO data.

**Services**

**Action : CO to Contact Updater**  
Allows you to update Contact Records using linked CO data.

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

**Oracle Eloqua Marketing Cloud**

*Company Name*

*Username*

*Password*

**Sign In** [Can't sign in?](#)

Remember Me

[Sign in with SSO or another account](#)

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

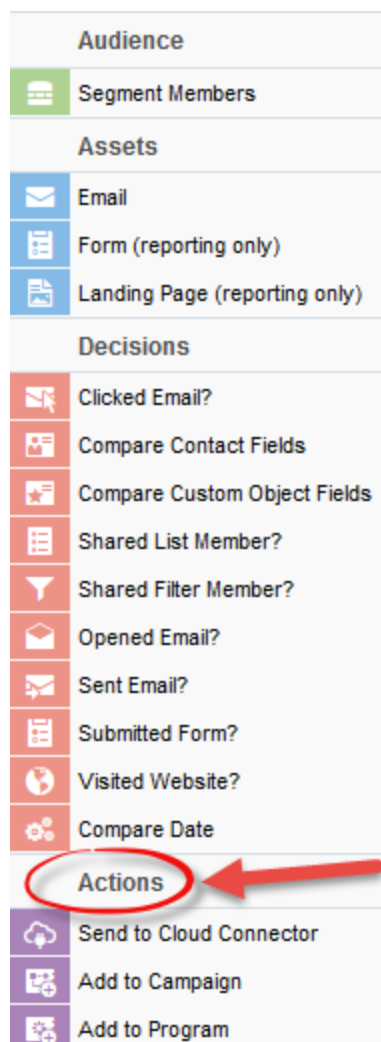
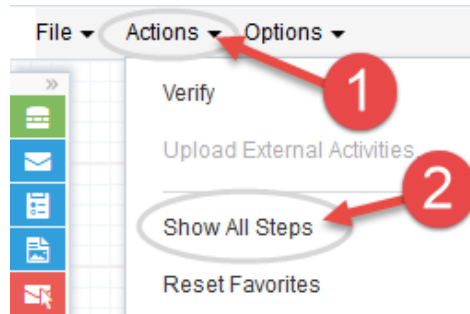


## 2) How to use

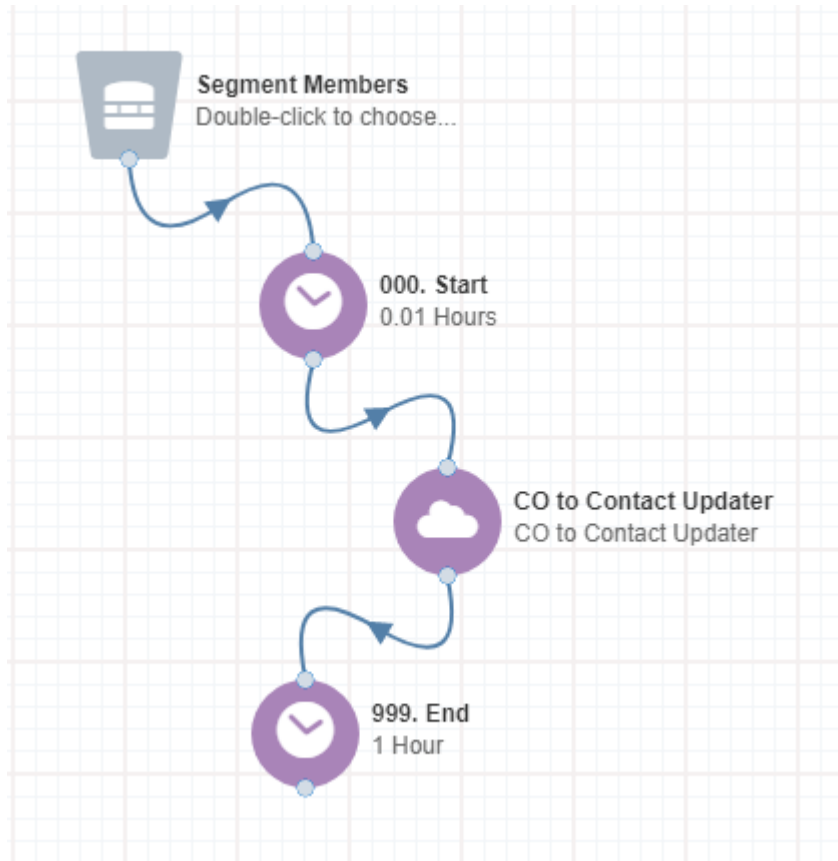
The following instructions show a basic/simple usage. You can incorporate this Cloud Action into any existing campaign.

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).

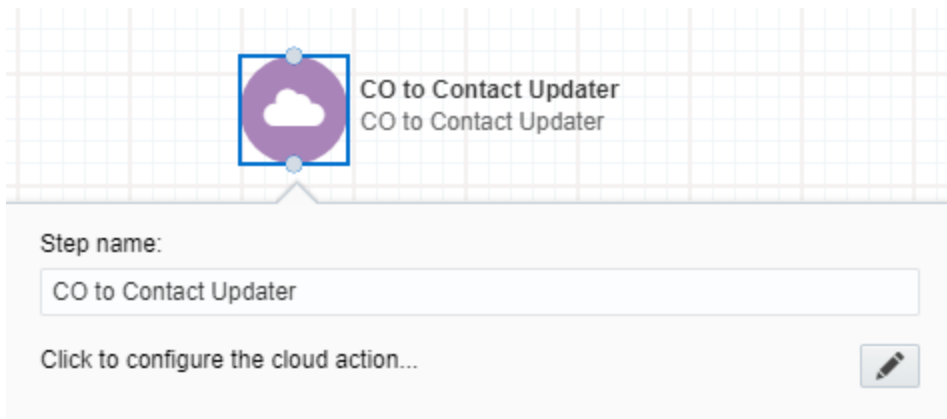


2.3 Drag and drop the cloud action to the canvas area. Connect the corresponding elements to the dropped cloud action



2.4 Double click the CO to Contact 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 ID 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 a 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.

- c. For this cloud action, you need to indicate the CO Set which contains the data that will update the linked Contact Records.

Cloud Action Configuration ✕



### CO to Contact Updater

Allows you to update Contact Records using linked CO data.

[Configurations](#) [Logs](#)

**CO Selection**

Start by selecting a CO from the following CO Set.  
Afterwards, move onto the next sections: Filtering, Mapping and Final Settings.

Custom Object

[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.

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- d. You can then filter the CO records linked to the Contact Record – this step is not required.
  - i. The filtering in this section should match the filter on the CO records used in the feeder to the Campaign

**Filtering Section (Optional)**

CO Field

Operator

Static Value

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Saved Filters

No filters saved yet.

- ii. Select the CO field on which you want to filter
  - iii. Select the operator
  - iv. Select the value to be compared
  - v. Click on the Add Filter button
  - vi. You can add additional filters using this process – you can include AND/OR logic as well (see example)
- NOTE: even if you use only 1 filtering element, you must fill in the Evaluation Order field (enter 1 if there is only 1 element)

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Saved Filters

<b>3</b>	CO Field	<input type="text" value="Revenue (Number)"/>	<input type="button" value="🗑"/>
	Operator	<input "&gt;="" (greater="" than)"="" type="text" value=""/>	
	Static Value	<input type="text" value="1000000000"/>	
<b>2</b>	CO Field	<input type="text" value="Employees (Number)"/>	<input type="button" value="🗑"/>
	Operator	<input "&gt;="" (greater="" than)"="" type="text" value=""/>	
	Static Value	<input type="text" value="5000"/>	
<b>1</b>	CO Field	<input type="text" value="Business Unit (Text)"/>	<input type="button" value="🗑"/>
	Operator	<input "='(Equal)"/' type="text" value=""/>	
	Static Value	<input type="text" value="Retail"/>	

- Use the numbers from the first column on the previous section (Saved Filters) as the identifiers.
- Use only *and*, *or*, numbers and spaces. For example: "1 and 2 or 3."
- The *and* operator will be evaluated first, then goes *or*. For example, a filter like *1 and 2 or 3* will be executed as: (*1 and 2*) then the result will be compared against *or 3*.

Evaluation Order



**Note:** Eloqua does not allow more than 2 date fields to be included in one filter

- e. Next, you need to specify the mapping from CO fields to Contact Fields.  
Select the CO field and the matching Contact field. Repeat these steps to add all the fields you need.  
Use the trash button to remove a specific field from the mapping area.

**CO to Contact Mapping**

CO Field:

Contact Field:

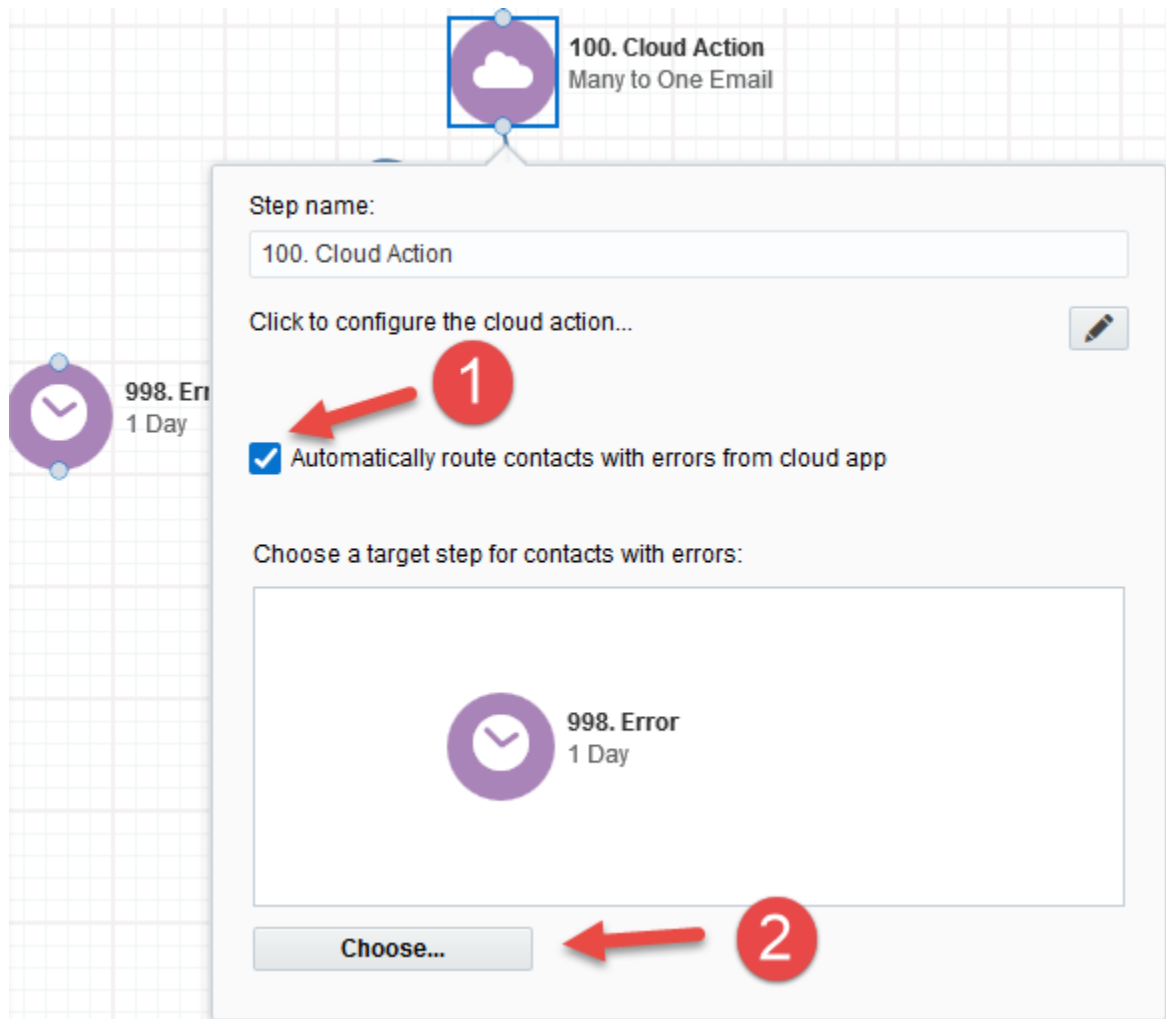
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**Saved Mappings**

<b>3</b>	CO Field	<input type="text" value="Company (Text)"/>	
	Contact Field	<input type="text" value="Company (Text)"/>	<input type="button" value="Trash"/>
<b>2</b>	CO Field	<input type="text" value="Last Name (Text)"/>	
	Contact Field	<input type="text" value="Last Name (Text)"/>	<input type="button" value="Trash"/>
<b>1</b>	CO Field	<input type="text" value="First Name (Text)"/>	
	Contact Field	<input type="text" value="First Name (Text)"/>	<input type="button" value="Trash"/>

- f. You should ignore the settings in the “Additional Settings” box. These are required for the more advanced Many to One usage
- g. Then click “Save Settings”.
- h. **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 CO to Contact Updater Cloud App 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:

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>	