



4THOUGHT MARKETING

CO TO CO LOOKUP

CLOUD ACTION DOCUMENTATION

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Purpose of the CO to CO Lookup Cloud Action

The CO to CO Lookup app looks up a value in a Source CO record based on criteria provided from a second CO record, and stores the corresponding value into a selected field in the second CO record.

This document will show how this Cloud Action can be used inside 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:

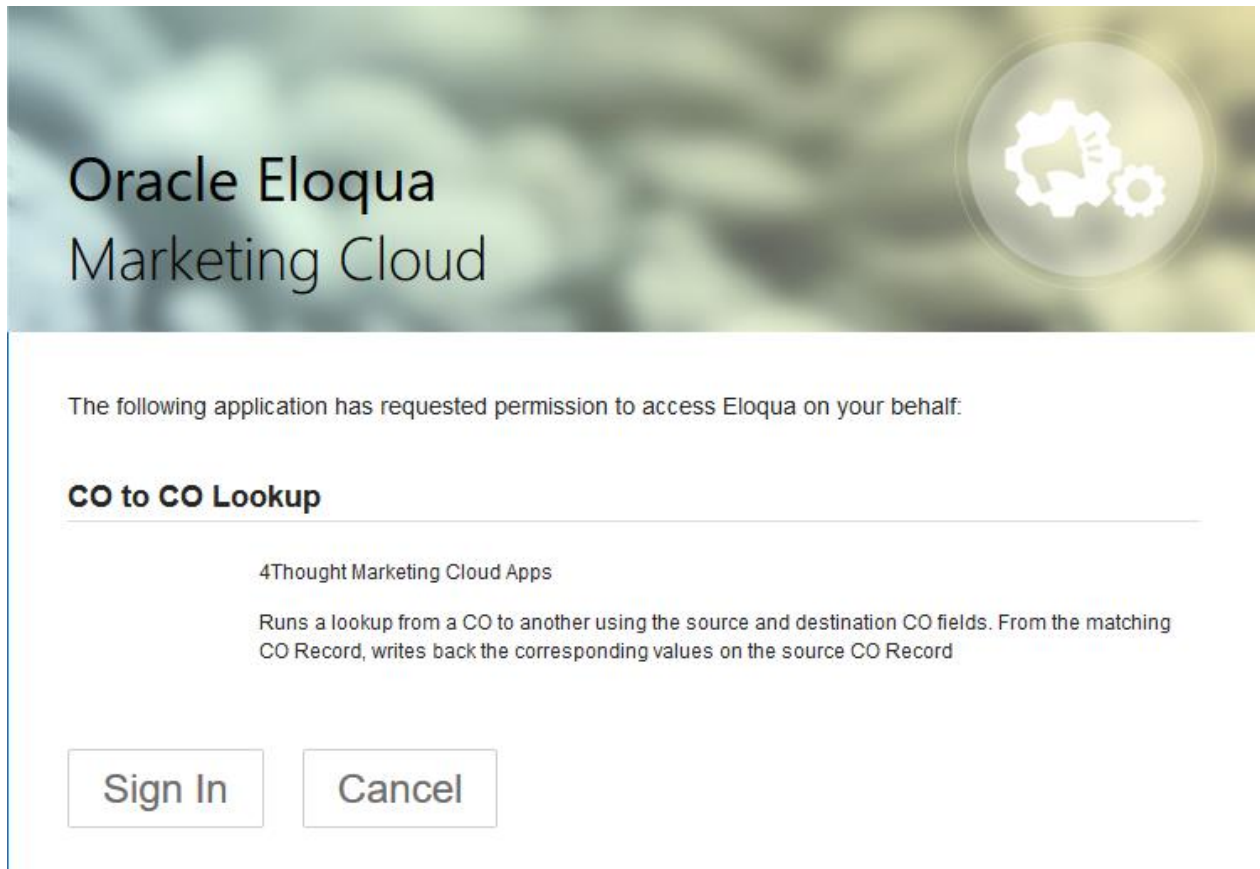
<https://login.eloqua.com/Apps/Cloud/Admin/Catalog/Add/48bf6d72-a8e5-456a-a195-2632387cc763/D5-CF-9C-42-B8-57-4A-9B-7C-98-EF-97-5C-08-DC-D4>. Sometimes, you’re asked to log again, please do so if it happens.

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

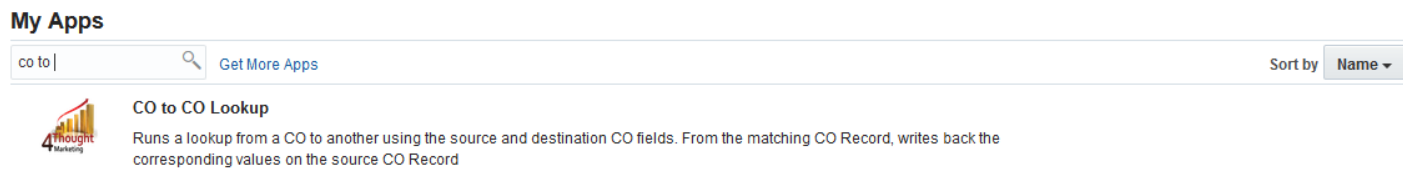
CO to CO Lookup		Accept and Install
	4Thought Marketing Cloud Apps www.4thoughtmarketing.com	
Email	support@4ThoughtMarketing.com	
Phone	888 356 7824	
Description	Runs a lookup from a CO to another using the source and destination CO fields. From the matching CO Record, writes back the corresponding values on the source CO Record	
Services		
	Action : CO to CO Lookup Runs a lookup from a CO to another using the source and destination CO fields. From the matching CO Record, writes back the corresponding values on the source CO Record	



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.



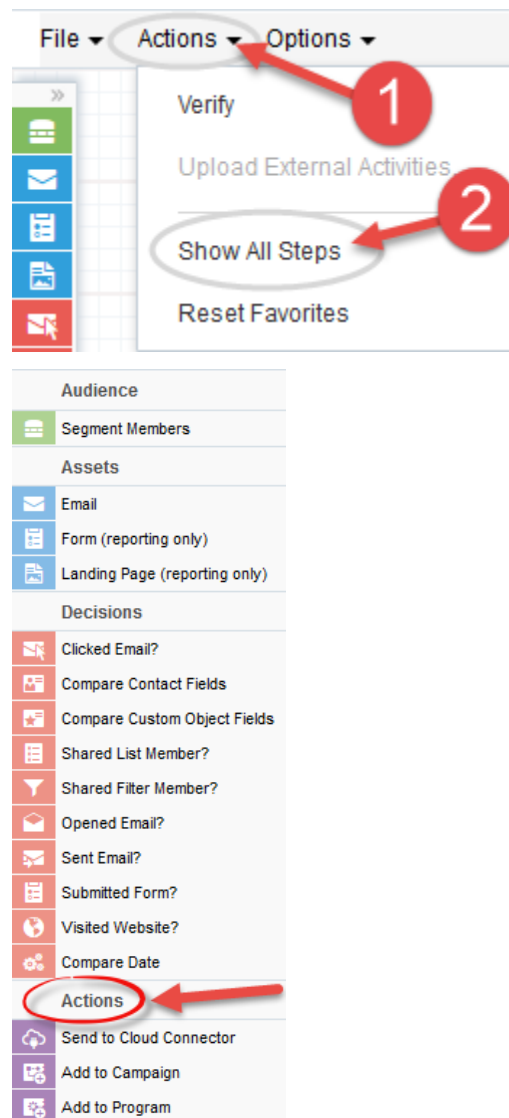


2) How to use

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

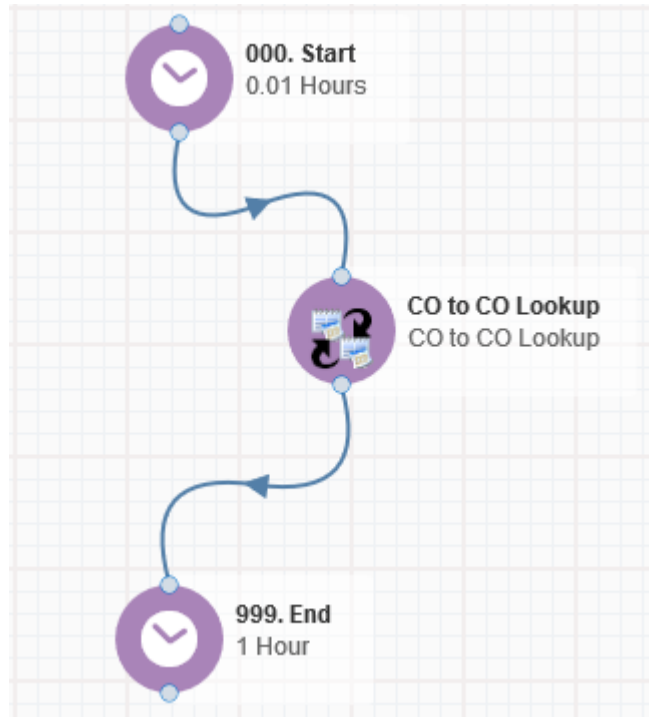
2.1 Create/Open a CO Program Canvas

2.2 Click on “Actions” on the top left side then “Show All Steps” and then locate the “CO to CO Lookup” 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 CO Lookup step, you will see the configuration options for this element.

2.4.1 Rename the step if needed

A configuration dialog box for the "CO to CO Lookup" step. The dialog has a title bar with the text "Cloud Action" and "CO to CO Lookup". Below the title bar, there is a "Step name:" label followed by a text input field containing "Cloud Action". At the bottom, there is a button labeled "Click to configure the cloud action..." with a small icon of a pencil and a document.



2.5 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:

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

2.6 For this cloud action, you can indicate the CO Field to execute the Lookup.

- 2.6.1 Select the field from the Source CO Set that will provide the source value (#1 below)
- 2.6.2 Select the CO Set to run the lookup against (#2 below)
- 2.6.3 Select the CO Field in the Lookup CO Set to run the lookup against (#3 below)
- 2.6.4 The option to select email address field will map updated CO records to the matching Contact record (#4 below)
- 2.6.5 Select the field on the Lookup CO record that has the data to be written to the Source CO. If there is no match, the value in the 'Default Value' will be written instead (#5 below)



- 2.6.6 Finally, select the field on the Source CO that will receive the new lookup value (#6 below). You may choose multiple values to be written from the Lookup record to the Source record.

Cloud Action Configuration

CO to CO Lookup

Runs a lookup from a CO to another using the source and destination CO fields. From the matching CO Record, writes back the corresponding values on the source CO Record

Configurations Logs

Source CO Set
Cloud Action Testing
This is the one selected in Program Canvas

Field from Source CO to use in Lookup
Email Address (Text)

Lookup CO Set
CO Lookup Test

Field from Lookup CO to match against
Email Address (Text)

(Optional) Map CO to Contacts
By selecting this field, updated CO Records will be mapped to Contacts using the matching CO-Lookup field-value.
Make sure the selected field is an Email Address and include this field in the following section.
If the matching value is empty or not a valid email address, the record will be flagged as 'errored'

Map values to move from Lookup CO to Source CO fields
If there is no matching CO record, the Default Value, if specified, will be used
If the Default Value is empty, the CO field in the Source CO record will not be updated
Enter "[datestamp]" to write a date stamp to the Source CO field (e.g. 01/17/2019 03:33:33.812)

Field to move from Lookup CO
testlong (Text)

Field to store value in the Source CO
Sales territory (Text)

Default Value

Saved Mappings

#	Lookup CO Field	Source CO Field
1	testlong (Text) Default Value Default Text	Sales territory (Text)

Save Settings Revert Changes



2.7 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.

Cloud Action
CO to CO Lookup

Step name:
Cloud Action

Click to configure the cloud action...

Scheduling Routing

☒ Automatically route contacts with errors from cloud app

Choose a target step for contacts with errors:

998. End
1 Day

Choose...

2.8 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 All logs

Within the following timeframe and

Get Logs Clear Values

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 goCloudPortal@4thoughtmarketing.net | Copyright © 2009 - 2019 | All Rights Reserved.



- 2.8.1 **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"
- 2.8.2 **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** → All logs ▼

Within the following timeframe 11/21/2018 and 01/21/2019 **2** →

Get Logs Clear Values

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.

That's all. Activate the Program



Note: Most 4Thought Marketing apps use the Eloqua BULK API to export/import records, therefore when an app is used in a campaign or program the user that activates the campaign should have the following permissions:

- *API*
 - *Consume API*
- *Contacts*
 - *Upload Contacts/Prospects/Companies*
 - *Manage Data Export*
 - *Manage Contacts*



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>

