



4THOUGHT MARKETING UPLOAD WIZARD USER DOCUMENTATION

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Document Purpose

4Thought Marketing Upload Wizard User Documentation

| Version | Date | Who | What/Change Summary |
|---------|------------|-------------|---------------------|
| 1.0 | 2017-11-27 | Tom Saichek | Version 1.0 |

4Thought Marketing Upload Wizard User Guide

Summary

The 4Thought Marketing Upload Wizard/Lead Engine enables an Oracle Eloqua user to process Contact information prior to entry into an Oracle Eloqua Contact and/or Custom Object (CO) record. There are standard and optional customized pre-processing modules which can be configured for different types of pre-processing.

This document has three components:

- A. Upload Wizard
- B. Pre-Processing Modules
- C. Lead Engine

1) Upload Wizard – Setup in Eloqua

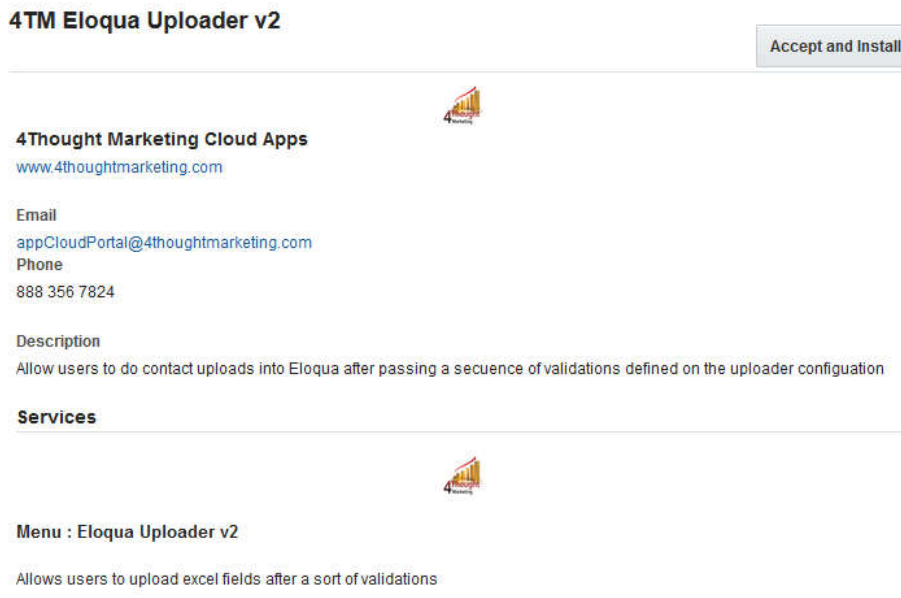
Please follow these instructions to set-up this cloud action in your Eloqua instance.

1. Log into Eloqua as usual.
2. Click the following link:


<https://login.eloqua.com/Apps/Cloud/Admin/Catalog/Add/2da7aaba-5098-4054-9216-74b7797a8a1f/97-72-E4-CC-1D-14-DA-51-A2-17-E3-24-85-09-4F-CC>

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

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



4TM Eloqua Uploader v2 Accept and Install


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

Email
appCloudPortal@4thoughtmarketing.com

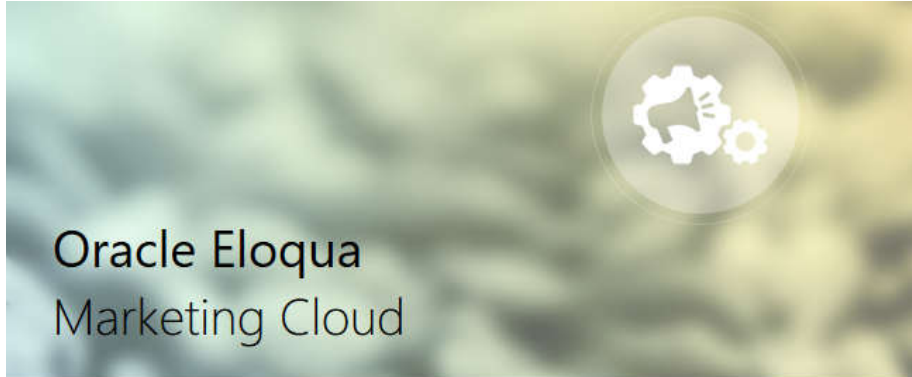
Phone
888 356 7824

Description
Allow users to do contact uploads into Eloqua after passing a sequence of validations defined on the uploader configuration

Services

 **Menu : Eloqua Uploader v2**
Allows users to upload excel fields after a sort of validations

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



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

4TM Eloqua Uploader v2

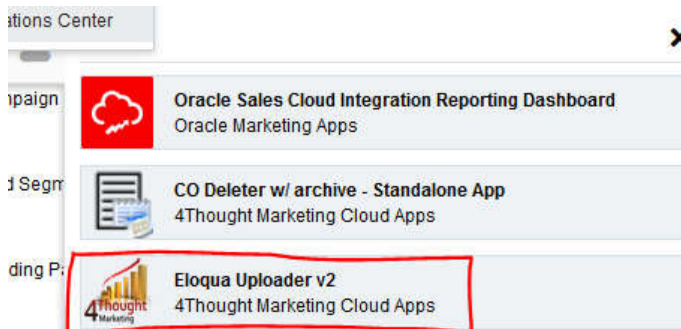
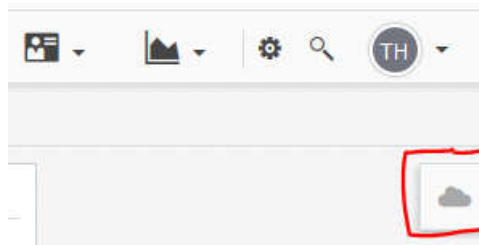


4Thought Marketing Cloud Apps

Allow users to do contact uploads into Eloqua after passing a sequence of validations defined on the uploader configuration

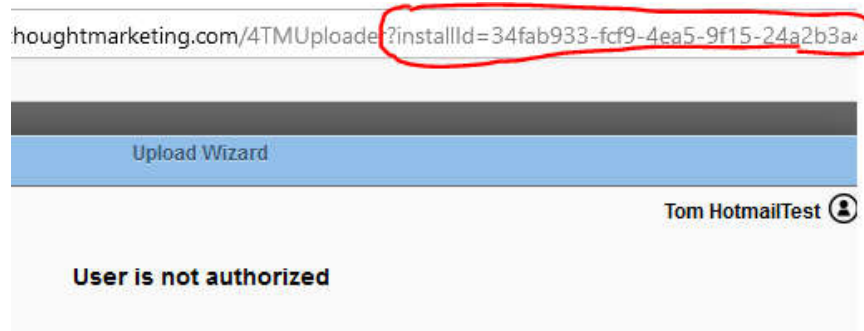


5. To authorize users, do the following steps:
 - 5.1. Open the App Menu, and click on Eloqua Uploader v2

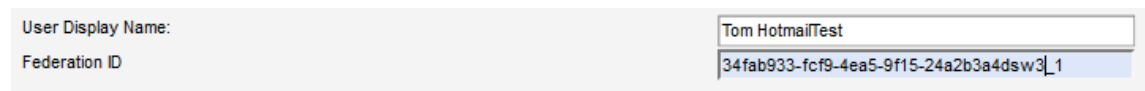


5.2. You will see the message “User is not authorized”.

5.3. In the url, copy the value after the word “installid” as shown here:



5.4. Next, go to your user record, and paste the InstallID you copied from the url into the field 'Federation ID'. Append the value “_1” after the ID as shown here, and save your user record



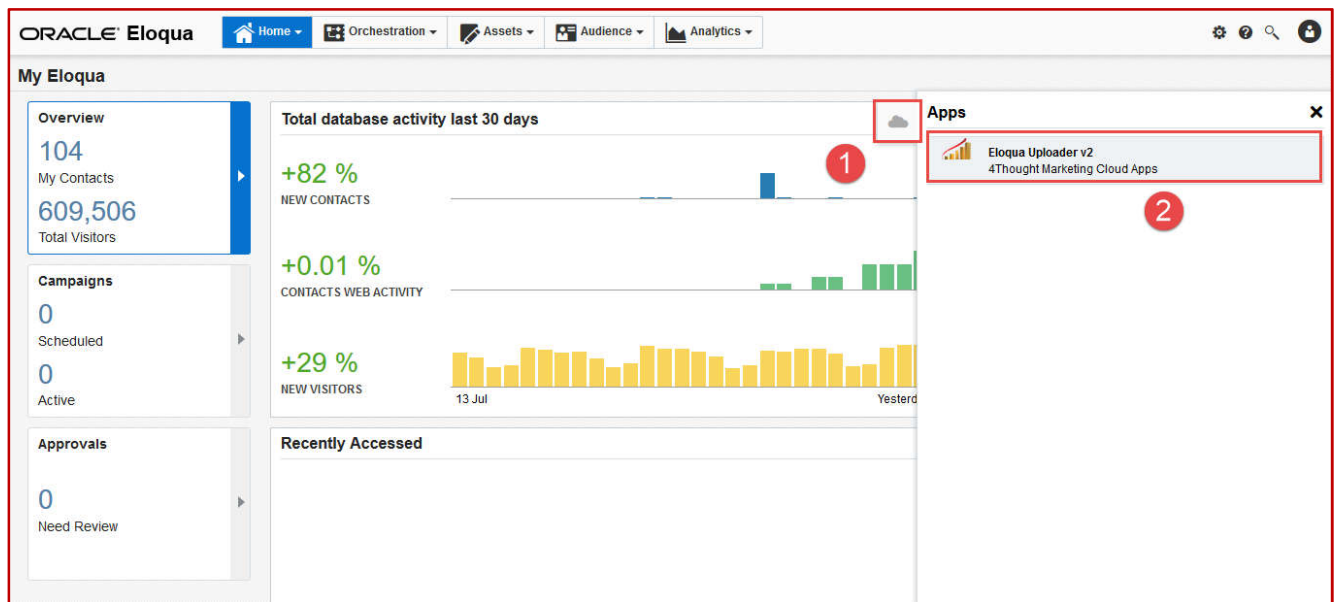
5.5. For all other users that will require access to the Upload Wizard, paste the InstallID value and append an underscore and a unique integer value for each user (e.g. “_2”, “_3”, etc).

5.6. Only users that have a valid value in the Federation ID of their user record will be authorized to use the upload wizard.

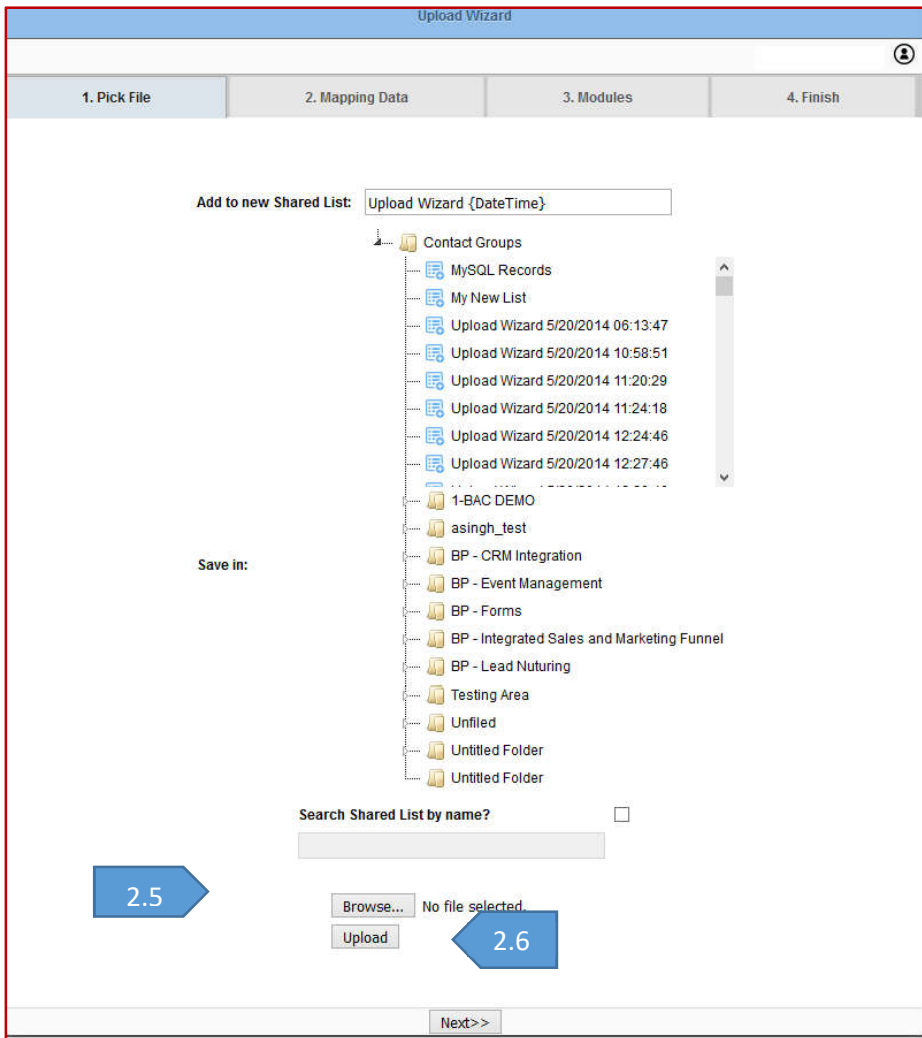
6. Your Upload Wizard is now installed and ready for use.

2) Upload Wizard – Uploading Contacts in Eloqua

1. To open the Upload Wizard, click on the cloud image on the extreme right side of your Eloqua dashboard and then click on Eloqua Uploader V2 as highlighted below.



2. Once you click on 4Thought Marketing Upload Wizard, you will see the upload wizard opening screen as shown below. Complete this form per the following directions:
 - 2.1. Add to New Shared List: Add a new Shared List name or select an existing list to which you will add your uploaded data
 - 2.1.1. The system will default to the name "Upload Wizard" followed by a date/time stamp "{DateTime}". You can keep this name, or overwrite it if you want a new list created
 - 2.1.2. If you want to add data to an existing Shared List, select that list from the listing showed
 - 2.2. Saved In: If you are adding a new list, select the folder in which you want the list saved
 - 2.3. Search Shared List by name?: If you want to add to an existing list, this will help you find that list
 - 2.4. Browse: Once you have chosen where to store the new data, browse your PC for the list you wish to upload
 - 2.5. Upload: Once you have selected the file to upload, click on "Upload" to start the import process
 - 2.6. After the upload has occurred, the system will take you to the second tab "2. Mapping Data"



3. Mapping Data

- 3.1. If there is more than one worksheet in your file, you will have the opportunity to choose which sheet to map to your contacts
- 3.2. Link to Contact (EMAIL ID): Choose the field on the list upload that will identify the Email Address to enable the Upload Wizard to update the correct Contact in Eloqua
- 3.3. Source Fields and Target Fields: For each 'Source Field' (the list of fields from your upload list is displayed for you), choose which Target (Contact) field that should be populated
 - 3.3.1. Note: you do not need to map all fields
- 3.4. Select Update Type: Choose how you would like each field to be updated. Your choices are:
 - 3.4.1. Set to Default (always update)
 - 3.4.2. Always update (this is the default)
 - 3.4.3. Update if blank (only update if the Contact field is blank)
 - 3.4.4. Update if new value not blank (only update if the value on the upload list is non-blank)
- 3.5. Save Mapping: Once you are done with mapping click on "Save Mapping". The system will save your field mapping and take you to the Modules tab

Upload Wizard

Tom Saichek

1. Pick File
2. Mapping Data
3. Modules

4. Finish

3.1

Select File Sheet

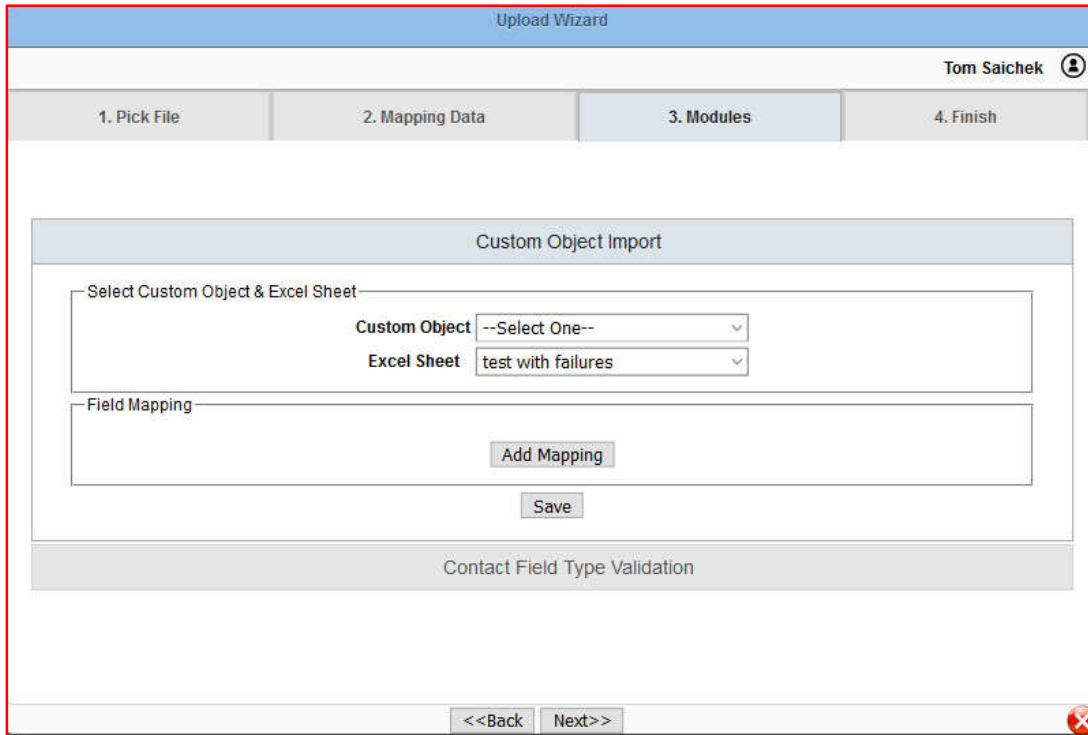
Link to Contact (Email Field)

3.2

| Source Fields (File) | Target Fields (Contact) |
|----------------------|---|
| Email Address | <input type="text" value="Email Address"/> <input type="button" value="Set to default"/> |
| First Name | <input type="text" value="name"/> <input type="button" value="Set to default"/> |
| Last Name | <input type="text" value="name"/> <input type="button" value="Set to default"/> |
| State | <input type="text" value="--Select One--"/> <input type="button" value="Set to default"/> |
| Country | <input type="text" value="Country"/> <input type="button" value="Set to default"/> |
| Currency | <input type="text" value="--Select One--"/> <input type="button" value="Set to default"/> |
| Counter1 | <input type="text" value="--Select One--"/> <input type="button" value="Set to default"/> |
| Counter2 | <input type="text" value="--Select One--"/> <input type="button" value="Set to default"/> |
| Asset | <input type="text" value="Asset"/> <input type="button" value="Set to default"/> |
| Renewal Date | <input type="text" value="Renewal"/> <input type="button" value="Set to default"/> |
| Large Text Field | <input type="text" value="--Select One--"/> <input type="button" value="Set to default"/> |
| Number of Claims | <input type="text" value="--Select One--"/> <input type="button" value="Set to default"/> |

3.5

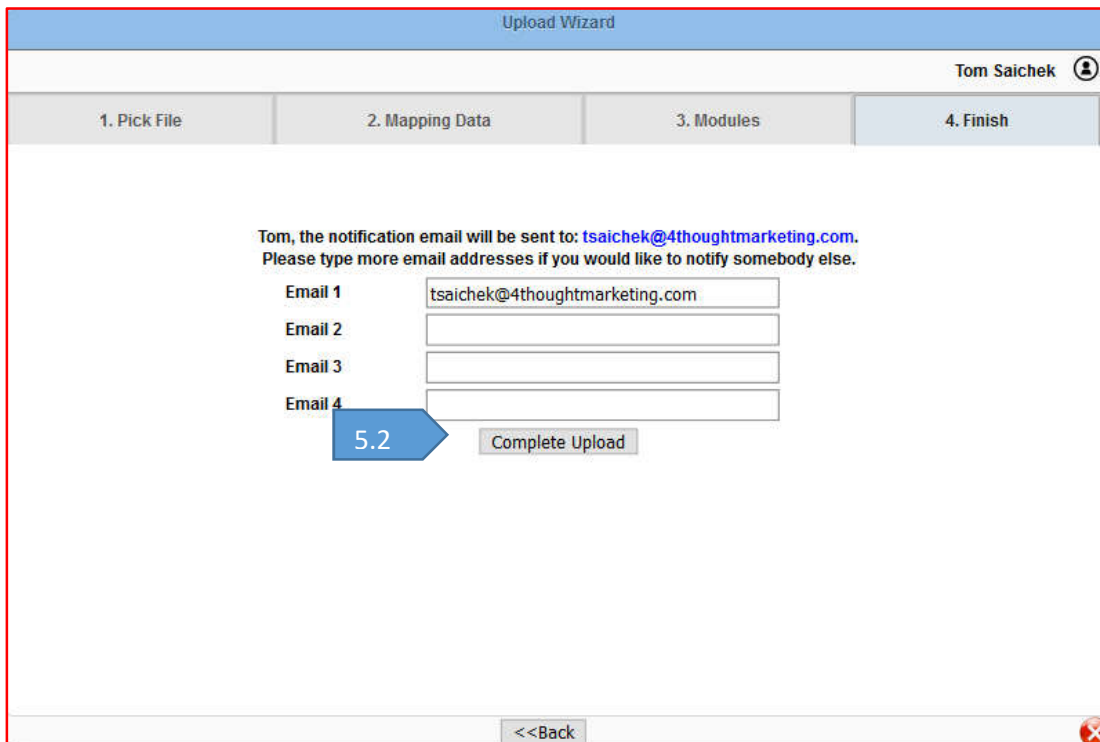
4. Optional Modules – there are built-in and customized pre-processing modules available for use prior to the list upload. See Section B for further description and usage of these modules
 - 4.1. After completing your work on the modules, click Next to finish the upload



5. Finish

5.1. Enter in one or more email addresses to be notified after the Upload Wizard executes.


5.2. When you hit “Complete Upload”, the Upload Wizard will load the data into Eloqua per your mapping requirements



5.3. After the Upload Wizard has completed, an email notification will be sent with the following information:

5.3.1. Number of records in the file

- 5.3.2. Number of successful new Contacts created
- 5.3.3. Number of successful existing Contacts updated
- 5.3.4. There will also be sections related to the Optional Modules per section B
- 5.4. The system will bring you back to the first screen of the Upload Wizard where you can begin another upload.



Upload Wizard Notification

The records requested have been successfully uploaded

| Start Time | End Time | Elapsed Time |
|-----------------------|-----------------------|--------------|
| 12/21/2017 1:11:31 PM | 12/21/2017 1:11:43 PM | 0 minutes |

Upload Details:

| Choice | Value |
|--------|-----------------------------|
| Client | 4ThoughtMarketingE10Sandbox |

Execution Details:

| Action | Parameters | Result |
|-----------------------------|---|---|
| Contact Results | File: Upload Wizard test file 20171116 v1.0 ts.xlsx Map to Contact on: Email Address | Total Rows in File: 2 Imported To Eloqua: 2 Contacts Created: 0 Contacts Updated: 2 Contacts Ignored: 0 Contacts Failed: 0 |
| Add Contact to Shared Lists | Shared List: tom UW test 20171220 15 | |

A. Optional Pre-processing Modules

There are two built-in pre-processing modules available with 4Thought Marketing Upload Wizard. Other modules can be customized to meet your specific needs. Possible customizations include:

- Check an existing Contact record for specific data (e.g. SFDC ID) prior to entry
- Append data fields to create a new value (useful for CO unique ID creation)

Talk to your 4Thought Marketing representative for more information about these customizations.

The two built-in modules are:


1. Custom Object mapping
2. Data Validation

These modules are described below:

1. Custom Object Mapping Module

- 1.1. Choose the Custom Object you want to populate with data from the list upload
- 1.2. If your excel file has more than one spreadsheet, you can choose which sheet to map to the Custom Objects
- 1.3. Map the fields from the list to the CO fields, following the process outlined above for Contact fields
 - 1.3.1. The system will select the default mapping to field for the chosen Custom Object. This is usually the Email Address, but could be others
 - 1.3.2. Click the 'Add Mapping' button to add other fields to be moved from the upload file to the CO.
 - 1.3.3. You can add as many fields as you want, and you do not need to map all fields
 - 1.3.3.1. Fields from the spreadsheet can only be mapped to one CO field. If you attempt to map the same field to multiple CO fields, you will get a warning message
 - 1.3.4. Click on 'Save' button to save the mapping to the Custom Object
- 1.4. Click on 'Next>>' if you are not going to use any other pre-processing modules

Upload Wizard

Tom Saichek 

1. Pick File
2. Mapping Data
3. Modules
4. Finish

Custom Object Import

Select Custom Object & Excel Sheet

1.1

Custom Object

Contacts.Uploads TEST 2

Excel Sheet

simple test

1.2

Field Mapping

1.3.1

Email Address
(Email Address Column)

Email Address
(Configured in Custom Object Set)


Set to default

1.3.2

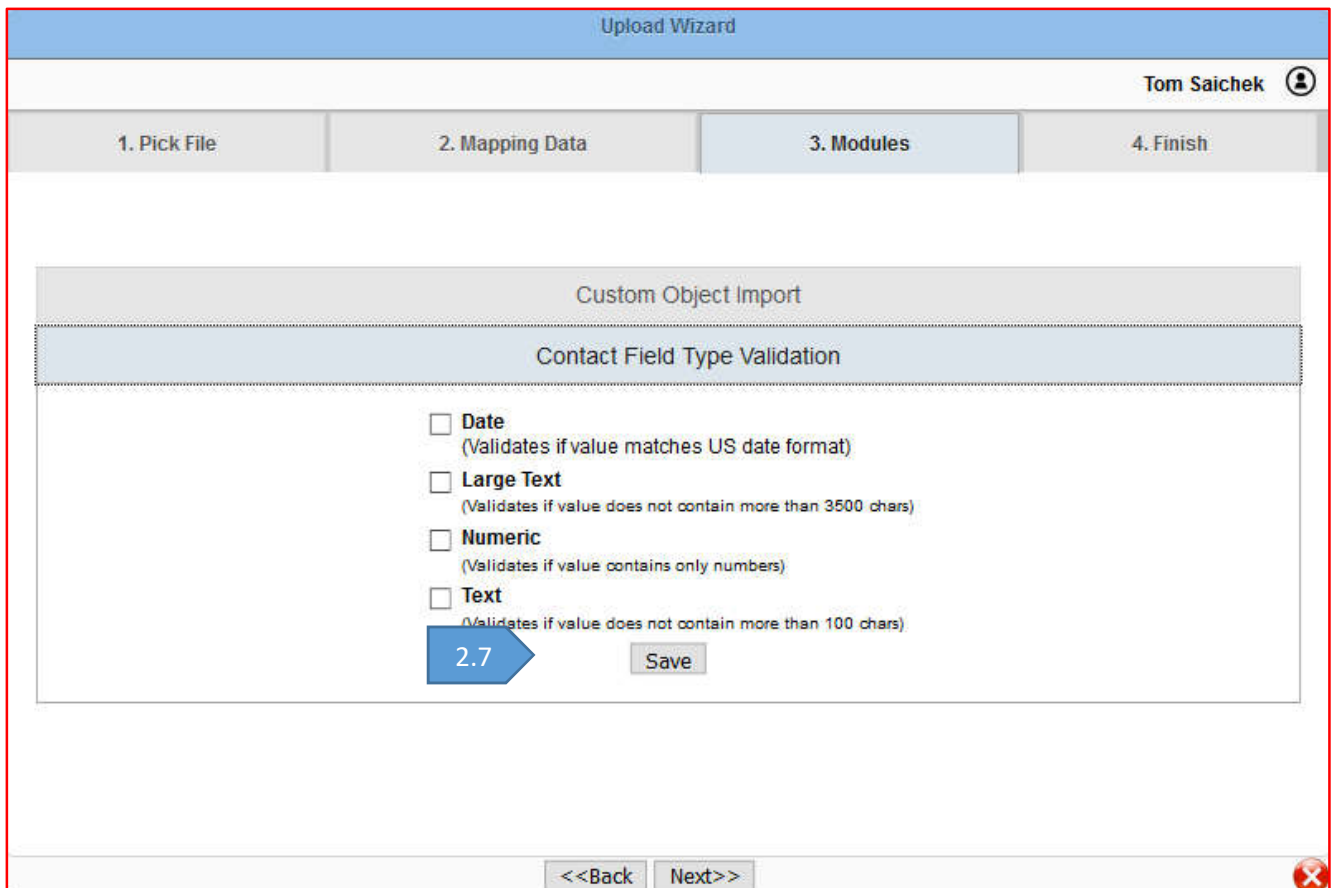
| Excel Field | Target CO Field | Update Rule Type | Action |
|------------------|------------------|------------------|--------|
| Asset | Asset | Set to default | Delete |
| Renewal Date | Renewal Date | Set to default | Delete |
| Number of Claims | number of claims | Set to default | Delete |

1.3.4

Contact Field Type Validation



2. Data Validation Pre-Processing Module
 - 2.1. Date – Checks to ensure format of field value matches the format of the date fields in Eloqua
 - 2.2. Large Text Field – Checks to see if the field length is more than Eloqua standard large text field (3,500 characters). If so, the record is marked as ‘invalid’
 - 2.3. Numeric Field – Checks to see if the field contains any non-numeric characters. If so, the record is marked as ‘invalid’
 - 2.3.1. Alpha characters are invalid
 - 2.3.2. “\$” is invalid
 - 2.3.3. Special characters are invalid
 - 2.3.4. More than one decimal point “.” Is invalid
 - 2.4. Text Field – Checks to see if the field length is more than Eloqua standard text field (100 characters). If so, the record is marked as ‘invalid’
 - 2.5. Any record with an invalid field value will be rejected during the list upload. These records will be identified on the email notification as ‘failed’ records
 - 2.6. You will be able to see all failed records by clicking on the “Get File” link in the notification email (see below)
 - 2.7. Click on the ‘Save’ button to store these choices and move onto finish the upload



The screenshot shows the 'Upload Wizard' interface. At the top, the title is 'Upload Wizard' and the user is identified as 'Tom Saichek'. The wizard has four steps: 1. Pick File, 2. Mapping Data, 3. Modules, and 4. Finish. The current step is '3. Modules'. Below the steps, there is a section titled 'Custom Object Import' with a sub-section 'Contact Field Type Validation'. This section contains four checkboxes for validation rules: 'Date' (Validates if value matches US date format), 'Large Text' (Validates if value does not contain more than 3500 chars), 'Numeric' (Validates if value contains only numbers), and 'Text' (Validates if value does not contain more than 100 chars). A blue arrow labeled '2.7' points to the 'Text' checkbox, and a 'Save' button is located to its right. At the bottom of the wizard, there are '<<Back' and 'Next>>' buttons.



Upload Wizard Notification

The records requested have been successfully uploaded

| Start Time | End Time | Elapsed Time |
|-----------------------|-----------------------|--------------|
| 12/21/2017 2:18:03 PM | 12/21/2017 2:18:15 PM | 0 minutes |

Upload Details:

| Choice | Value |
|--------|-----------------------------|
| Client | 4ThoughtMarketingE10Sandbox |

Execution Details:

| Action | Parameters | Result |
|-----------------------------|---|--|
| Contact Results | File: Upload Wizard test file 20171116 v1.0 ts.xlsx Map to Contact on: Email Address | Total Rows In File: 4 Imported To Eloqua: 4 Contacts Created: 0 Contacts Updated: 4 Contacts Ignored: 16 Contacts Failed: 0 |
| Add Contact to Shared Lists | Shared List: tom UW test 20171220 t9 | |

File with Excluded Records: [Get File](#)

Module Details:

Custom Object Import



B. Lead Engine

The Upload Wizard loads the uploaded list into the Lead Engine. All of the processing that was configured in the Upload Wizard section is executed by the Lead Engine. As a result, the Lead Engine can be used to process data from Form Submits as well as list uploads.

To utilize this feature, you can request that 4Thought Marketing build customized modules (See section B) that will process form submissions exactly as you have configured the modules to process list uploads.

See your 4Thought Marketing representative for more information about this powerful tool.