



4THOUGHT MARKETING

CO LOOKUP

CLOUD ACTION DOCUMENTATION

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Purpose of the CO Lookup Cloud Action

CO Lookup allows you to select any Contact field to run a lookup vs a CO set-field and update the Contact from the matching Record.

This document will show how this Cloud Action can be used inside Campaign or 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/ca7c577f-b4b1-42d8-b7f1-2fcd18e6be8f/6A-90-0A-98-2A-6C-38-AF-14-D3-F4-56-73-71-F8-63>. Sometimes, you’re asked to log again, please do so if it happens.

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

CO Lookup

Accept and Install



4Thought Marketing Cloud Apps

www.4thoughtmarketing.com

Email support@4ThoughtMarketing.com

Phone 888 356 7824

Description Uses a Contact Field to run a lookup against a given CO Set; from the matching CO Record, writes back the corresponding values on the Contact table.

Services



Action : CO Lookup

Uses a Contact Field to run a lookup against a given CO Set; from the matching CO Record, writes back the corresponding values on the Contact table.



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

The screenshot shows the Oracle Eloqua Marketing Cloud interface. At the top, the text "Oracle Eloqua Marketing Cloud" is displayed. Below this, a message states: "The following application has requested permission to access Eloqua on your behalf." Underneath, the application name "CO Lookup" is shown. A description follows: "4Thought Marketing Cloud Apps" and "Uses a Contact Field to run a lookup against a given CO Set; from the matching CO Record, writes back the corresponding values on the Contact table." At the bottom, there are two buttons: "Sign In" and "Cancel".

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

The screenshot shows the "My Apps" section of the interface. It features a search bar with the text "co loo" and a magnifying glass icon, followed by a "Get More Apps" link. To the right, there is a "Sort by" dropdown menu set to "Name". Below the search bar, the "CO Lookup" app is listed with its logo and description: "Uses a Contact Field to run a lookup against a given CO Set; from the matching CO Record, writes back the corresponding values on the Contact table."

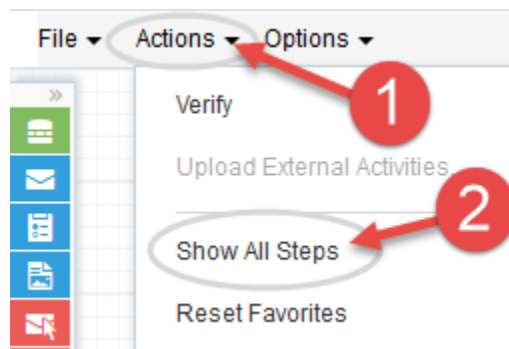


2) How to use



















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

2.1 Create/Open a Campaign or Program Canvas

2.2 Click on “Actions” on the top left side then “Show All Steps” and then locate the “CO Lookup” Cloud Action under the Actions options (colored in purple).

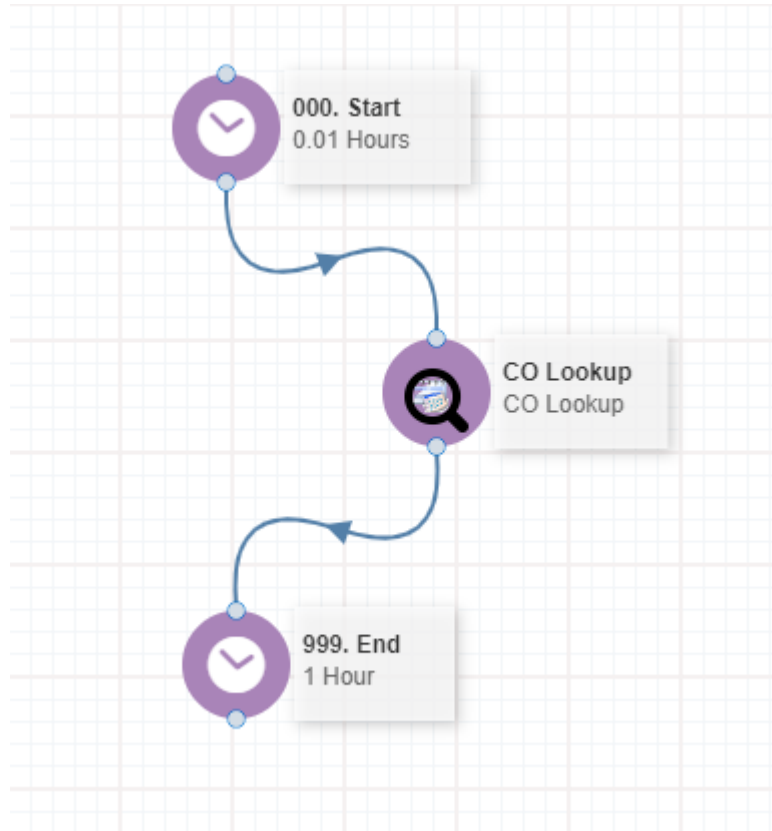




Audience	
	Segment Members
Assets	
	Email
	Form (reporting only)
	Landing Page (reporting only)
Decisions	
	Clicked Email?
	Compare Contact Fields
	Compare Custom Object Fields
	Shared List Member?
	Shared Filter Member?
	Opened Email?
	Sent Email?
	Submitted Form?
	Visited Website?
	Compare Date
	Actions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

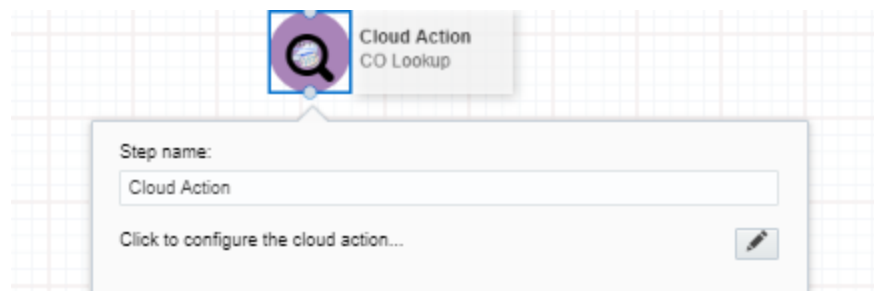


2.3 Drag and drop the cloud action to the canvas area. Connect the corresponding elements to the dropped cloud action



2.4 Double click the CO Lookup step, you will see some options for this element.

a. Rename the step if needed



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:



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 | Copyright © 2009 - 2016 | All Rights Reserved.

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

Select the CO Set to run the lookup against.

Select the CO Field to run the lookup against the previous Contact Field.

On the following section, you indicate the fields to move from the Matched CO Record to the Contact Table. If there's no match, the Default values will be used. If you leave the 'Default Value' empty, the corresponding Contact Field (s) will not be updated.



Cloud Action Configuration

CO Lookup

Uses a Contact Field to run a lookup against a given CO Set; from the matching CO Record, writes back the corresponding values on the Contact table.

Configurations | Logs

Contact Field to Match	Email Address (Text)
CO Set to run lookup	CO Lookup Test
CO Field to Match	Email Address (Text)

Fields to move from the Matched CO Record
If there's no matching CO Record, the default value will be used

CO Field	- Select One Field -	Contact Field	- select a field -
Default Value			

[Add Mapping 1](#)

If the Default value is empty, it won't update the corresponding Contact Field.

Saved Mappings

1	CO Field	ZZ - SPDC ContactID (Text)	Contact Field	ZZ - SPDC ContactID (Text)	
	Default Value				
2	CO Field	ZZ - SPDC LeadID (Text)	Contact Field	ZZ - SPDC LeadID (Text)	
	Default Value				

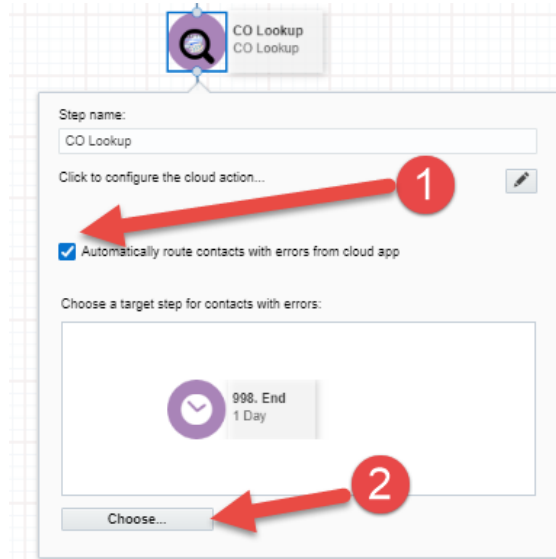
App as Form Processing Step

To use this App-instance as a Form Processing Step (FPS), click [here](#)

[Save Settings](#) [Revert Changes](#)

You're logged as [tough@4thoughtmarketing.com](#), click [here](#) to log out.
Having issues? Click [here](#) to send us an email.

- 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.



2.6 That's all. Activate the Campaign or Program, put some contacts in it and see the CO Lookup 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)
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Sales sales@4ThoughtMarketing.com
Website <http://www.4thoughtmarketing.com>

