

CO Count Cloud App Documentation

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Purpose of the CO Count Cloud App

There are situations where you need to know how many CO records exist for a contact that matches a specific set of criteria. This cloud action counts the number of CO Records linked to a Contact and writes the value in a Contact field and/or a field in a specific CO set.

This document will show how this Cloud action can be used inside Campaign/Program Canvas.

Set-up in Oracle Eloqua

Please follow these instructions to set up this cloud app in your Oracle Eloqua instance.

- Log in to Oracle Eloqua.
- Click on Get App below to install.

[Get app](#)

NOTE: If prompted to log again, please do so.

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

CO Count

Accept and Install



4Thought Marketing Cloud Apps

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Description

Count the number of CO Records linked to a Contact and write the value in a Contact field and/or a field in a specific CO set

Services



Action : CO Count

Count the number of CO Records linked to a Contact and write the value in a Contact field and/or a field in a specific CO set

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

Oracle Eloqua Marketing Cloud

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

CO Count

4Thought Marketing Cloud Apps

Count the number of CO Records linked to a Contact and write the value in a Contact field and/or a field in a specific CO set

Sign In

Cancel

ORACLE®

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

My Apps

[Get more apps at the marketplace](#)

co coun



Sort by

Name ▼



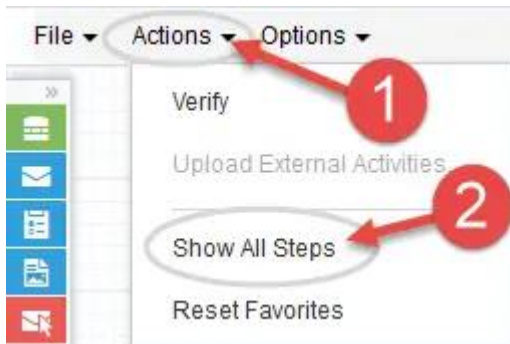
CO Count

Count the number of CO Records linked to a Contact and write the value in a Contact field and/or a field in a specific CO set

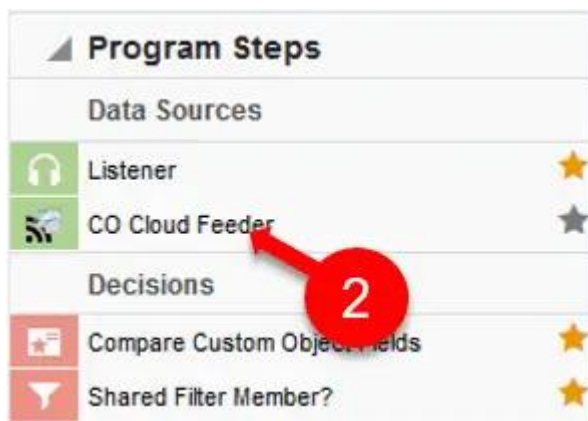
How to use

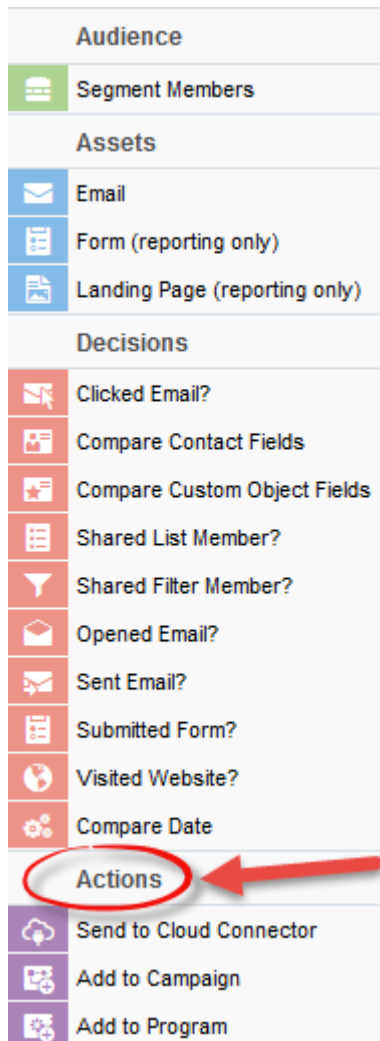
The following instructions show a basic/simple usage. You can incorporate this Cloud Action to any existing Campaign or Program Canvas.

- Create/Open a Campaign or Program Canvas
- On “Actions” on the top left side then “Show All Steps” and then locate the “CO Count ” Cloud Action under the Actions options (colored in purple).

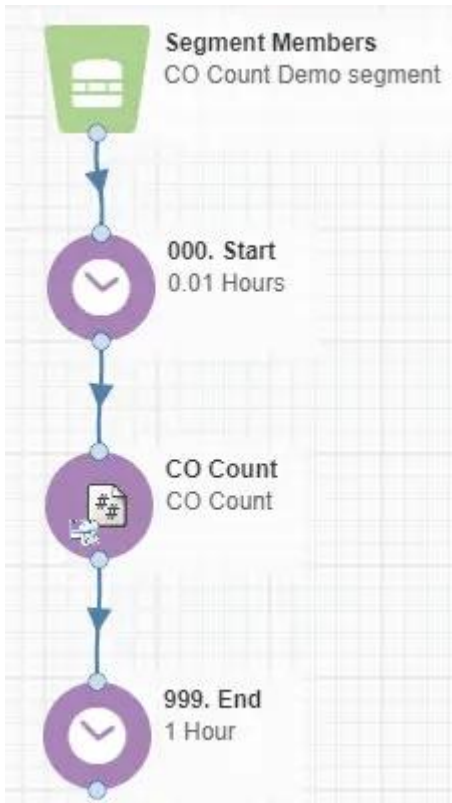


- Under “Data Sources” locate the “CO Cloud Feeder” App (colored in green)





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



- Double click the CO Count step; you will see the configuration options for this element.
 - Rename the step if needed

- 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?](#)

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- For this cloud action, you need to select Custom Object (CO) which contains the data that will update the linked Contact records.



CO Count

Count the number of CO Records linked to a Contact and write the value in a Contact field and/or a field in a specific CO set

Configurations

Logs

CO Set

- Select One -

CO Filtering (Optional)

CO Field Please select a CO Set

Operator - Please select one -

Static Value Type a value

Add Filter II

Saved Filters

No filters saved yet.

Evaluation Order

- Eloqua has some limitations on the API filtering capabilities, to see those limitations click [here](#).
- Use the numbers from the first column on the previous section (Saved Filters) as the identifiers.
- Use only *and*, *or*, *not*, numbers and spaces.
For example: "(not 1) and 2 or 3."
- If you don't use parenthesis, 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*.

Contact Field - Select One -

CO Set

- Select One -

Field to store the CO Count

CO Set

Contact's Email Address

Select a CO set first

CO Count

Select a CO set first

Save Settings

Revert Changes

You're logged as ksingh@4ththoughtmarketing.com, click [here](#) to Log out.

- Select CO set from the list, on which you want to perform action.

Cloud Action Configuration



CO Count

Count the number of CO Records linked to a Contact and write the value in a Contact field and/or a field in a specific CO set

Configurations
Logs

CO Set

- Select One - ▼

Save Settings

Revert Changes

You're logged as ksingh@4thoughtmarketing.com, click [here](#) to Log out.

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- You can then filter the CO records linked to the Contact Record – this step is not required.

CO Field

- Select One Field - ▼

Operator

- Please select one - ▼

Static Value

Type a value

Add Filter ↓

- i. Select the CO field on which you want to filter
- ii. Select the operator
- iii. Put the value to be compared
- iv. Click on the 'Add Filter' button
- v. You may add additional filters using this process – you can include AND/OR logic as well (see example)

CO Field	Country (Text)	▼
1 Operator	= (Equal)	▼
Static Value	United States	
CO Field	Total Employee (Numeric)	▼
2 Operator	< (Less Than)	▼
Static Value	500	
CO Field	Revenue (Numeric)	▼
3 Operator	>= (Greater or Equal Than)	▼
Static Value	20000000	

Evaluation Order

- Eloqua has some limitations on the API filtering capabilities, to see those limitations click [here](#).
- Use the numbers from the first column on the previous section (Saved Filters) as the identifiers.
- Use only *and*, *or*, *not*, numbers and spaces.
For example: "(not 1) and 2 or 3."
- If you don't use parenthesis, 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*.

1 AND (2 OR 3)

- Next, you need to specify the field in which you want to store the CO Count. This can either be a Contact field or a CO field on a separate CO record
 - For a contact field, simply specify the field.
 - If you want to store on a CO field, first choose the CO set, the email address field, and the CO Count field.

Contact Field

- Select One - ▼

Field to store the CO Count

CO Set

- Select One - ▼
 Contact's Email Address
 Select a CO set first ▼
 CO Count
 Select a CO set first ▼

Save Settings

Revert Changes

- Make sure you click on 'Save Settings' to save your configuration. If you make any changes you can click on 'Revert Changes' to go back to the last saved configuration.
- Logs Tab:** This section shows the execution logs for the 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.

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- Show:** Here you can select what type of log you want to see. You have an option to select “All logs”, “Successful logs only”, “Failed logs only”
- 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 of logs

- **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 records with errors from cloud app”, select the step where you want the records to be routed.

Select the Step where you want the records to be routed.


Step name:

100. CO Count

Click to configure the cloud decision...

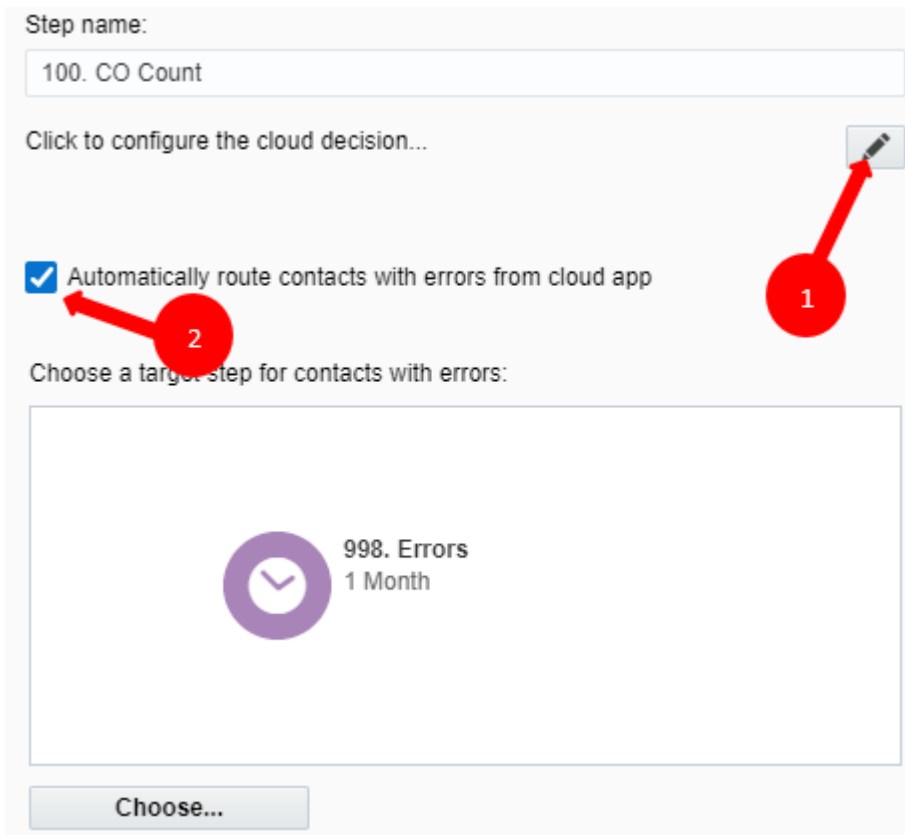
☒ Automatically route contacts with errors from cloud app

Choose a target step for contacts with errors:



998. Errors
1 Month

Choose...



That's all. Activate the campaign or program, put some records in it and see the CO Count in action!

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 not see CO Records being processed by the App, it may be due to a missing or expired License which you can get with your corresponding Account Manager.