

CO Deleter W/ Archive Cloud App Documentation

Table of Contents

- [Set-up in Oracle Eloqua](#)
- [Use](#)
- [License Information](#)

Set-up in Oracle Eloqua

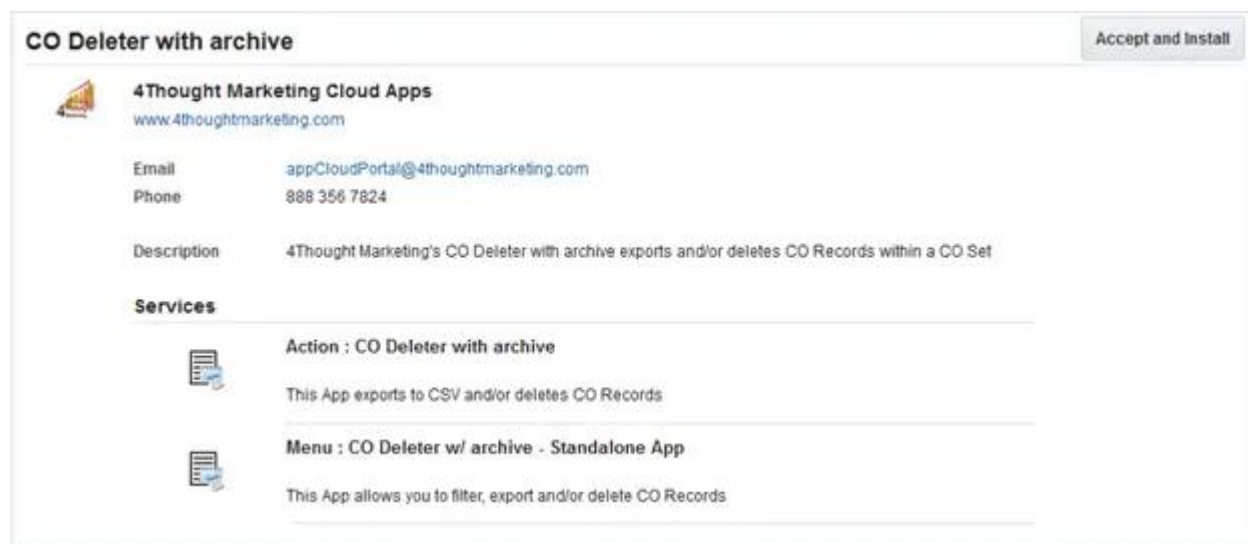
Please follow these instructions to set up this cloud app in your Oracle Eloqua instance.

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

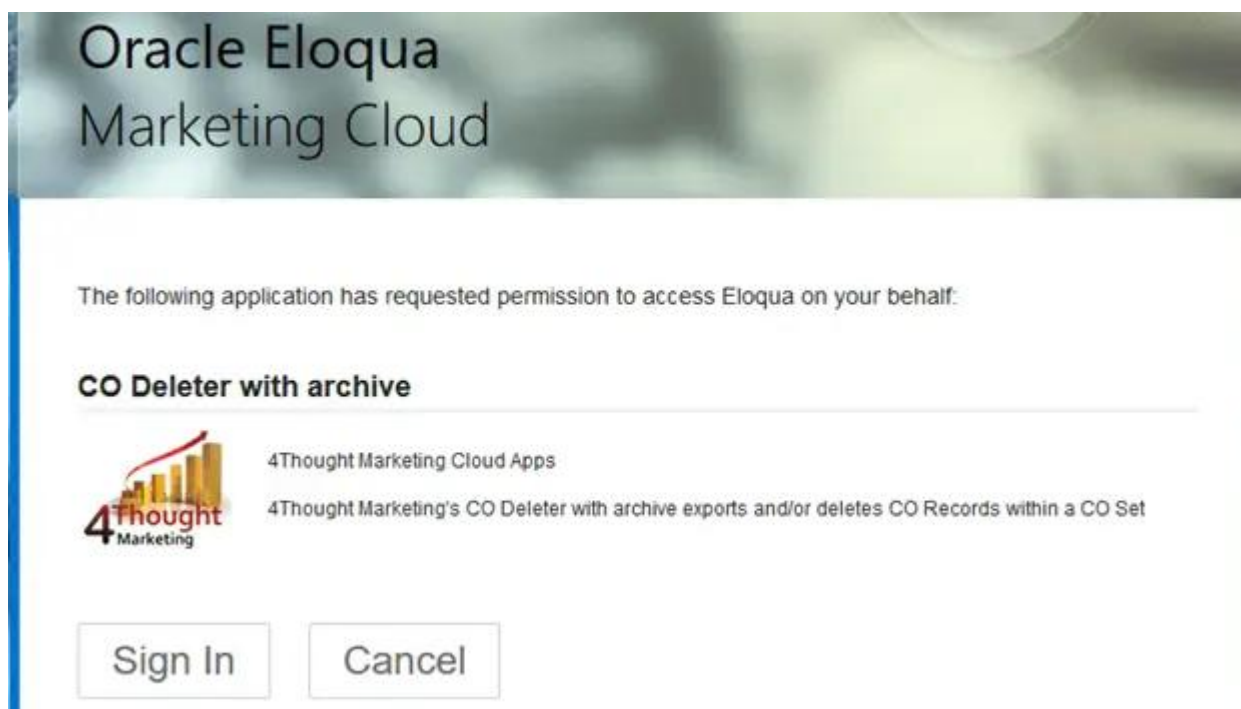
[Get app](#)

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

- In the following screen, click “Accept and Install” on the top-right section



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



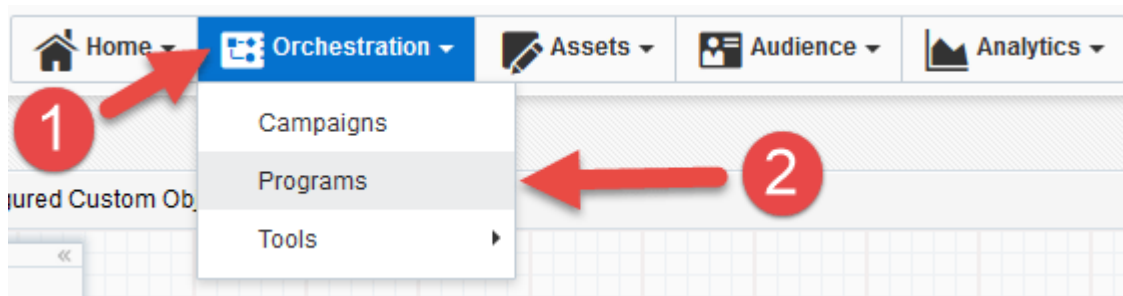
- You're all set. The cloud app is ready to be used.



Use

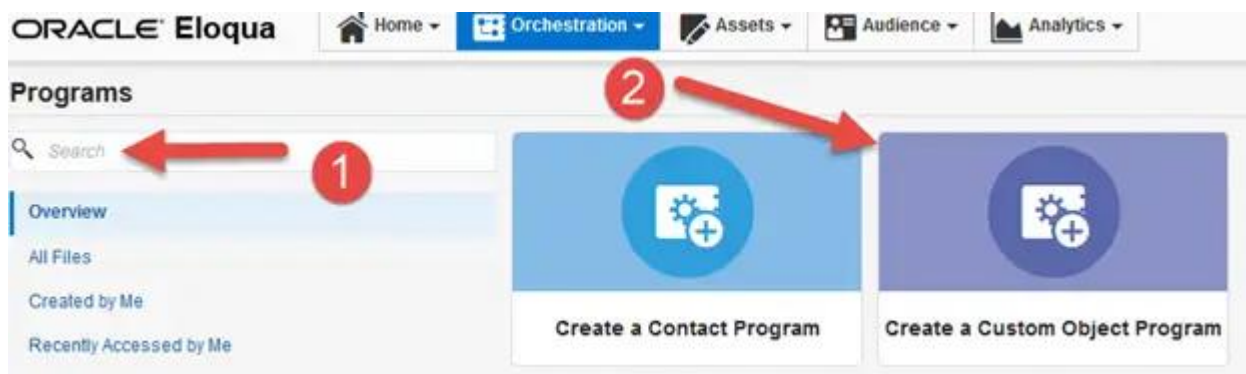
The following instructions show a basic/simple usage. You can incorporate this Cloud Action into any New/Existing program canvas.

- Create/ Open a Custom Object Program Canvas by going to Orchestration and Programs.

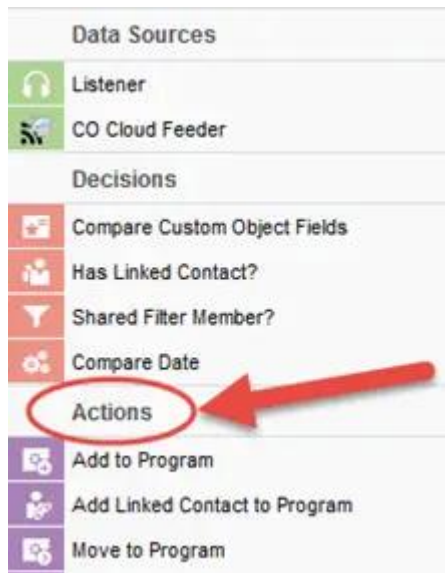


The following instructions show a basic/simple usage. You can incorporate this Cloud Action into any New/Existing program canvas.

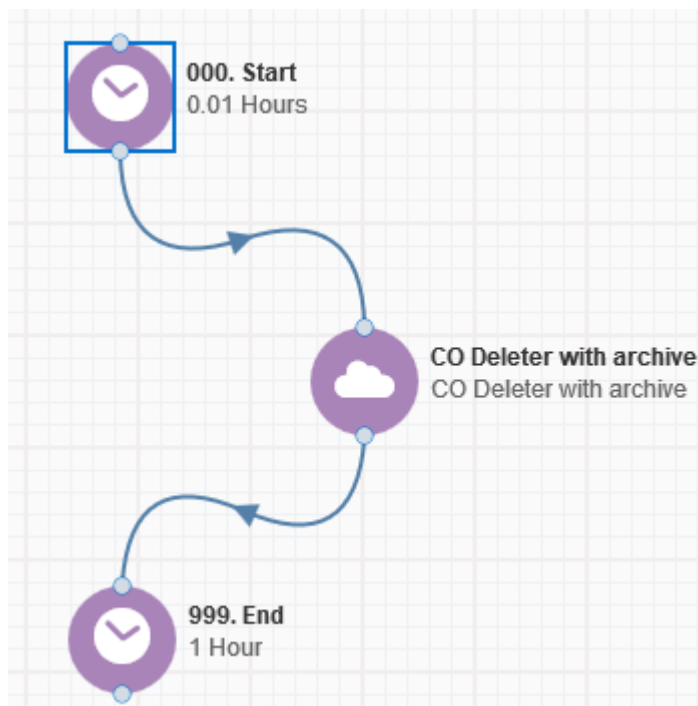
- Next Search to open an existing Custom Object Program (#1 option) or click on “Create a Custom Object Program” to create a new one (#2 option), if you are creating a new one you have to select a Custom Object Data Set (step 3 shown in the snapshots below).



- Click on “Program Steps” on the top left side to show all steps and then locate the “CO Deleter with Archive” Cloud Action under the Actions options (colored in purple).



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

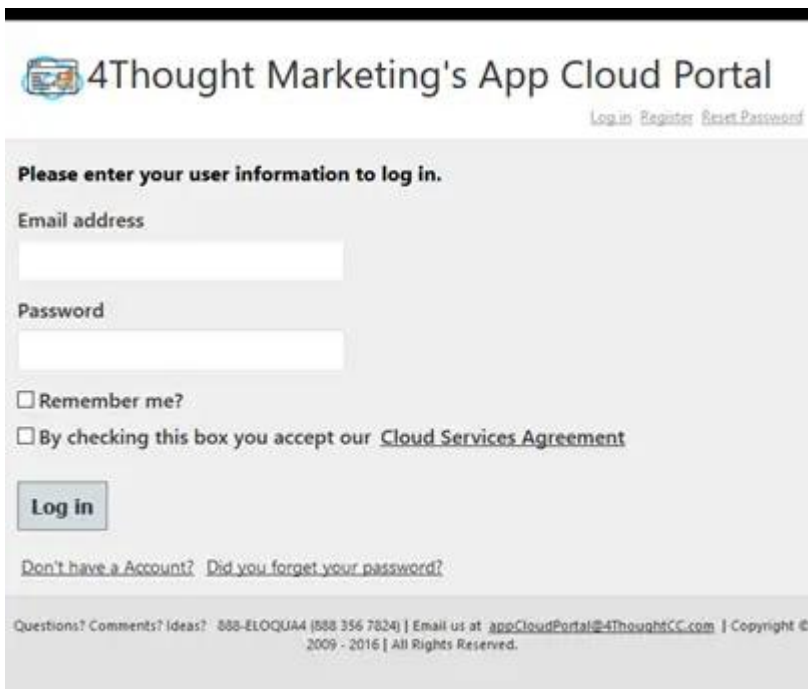


- Double click the CDO Lookup step, you will see some options for this element.
 - a. Rename the step if needed



b. Click the pencil icon to open the settings for this step.

You will need a user 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:



b. 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:

- Fill out the Misc Setting details
 1. a. Identify if the CO records are linked to Contacts or Accounts
 2. b. Give the export file a name.

Note: if you use the {datestamp} (all in lower case) Wildcard the App will create a .csv file with this name and a datestamp Appended at the end of the name.

For example: "CDO Archive {datestamp}" will generate the following filename: "CDO Archive 08-03-2017"

3. You can choose to receive notifications on success and/or failure to the email address(es) added for notifications, multiple emails can be separated by comma (,)

CO Deleter with Archive

Exports Custom Object Data to a Comma Separated Values (CSV) file and uploads the backup file to a SFTP server. Then, if selected, removes the CO Records from the Eloqua Database.

Configurations Logs

Misc Settings

CO Set

Linked Entity to CO Set Contact

Filename

Use {datestamp} (lower case) to replace it by a date stamp.
For example: "CO Archive {datestamp}" will generate the following filename: "CO Archive 07-31-2017 14.39.34.368"

Example {datestamp}

Email Notification on Success

An email notification will be sent if the process was completed successfully
Indicate email addresses separated by comma (,)

Email Notification on Failure

An email notification will be sent if the process did not finish successfully
Indicate email addresses separated by comma (,)

Delete CO Records after processing ☐

- 4. If you want to Delete the CO records after they are processed by the app check the box as shown in the snapshot below.

NOTE: When selecting the 'Delete' option, the filtered CO records will be removed from the Oracle Eloqua Database and cannot be recovered

◦ Next, fill in the SFTP Server Settings:

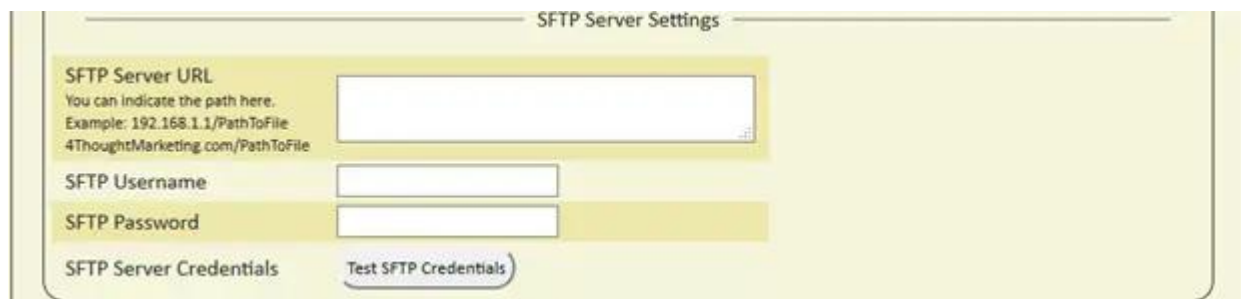
a. Type in the Server URL, username, and password

Note: The Server URL can be entered as the "IP or Domain/PathToFile"

Example: 192.168.1.1/PathToFile

4ThoughtMarketing.com/PathToFile

- b. Click on the “Test SFTP Credentials” button to ensure a connection can be made to the server

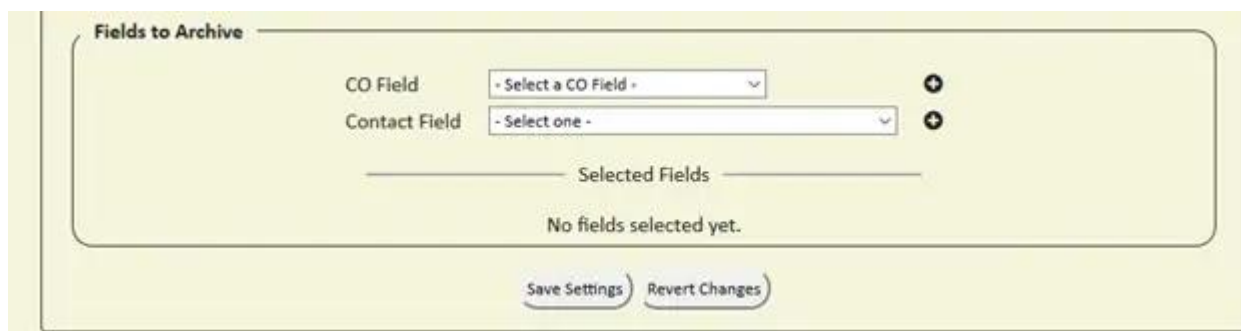


The screenshot shows the 'SFTP Server Settings' form. It includes a text input for 'SFTP Server URL' with a placeholder example: '192.168.1.1/PathToFile' and '4ThoughtMarketing.com/PathToFile'. Below this are text inputs for 'SFTP Username' and 'SFTP Password'. At the bottom, there is a 'Test SFTP Credentials' button.

- Choose the Fields to Archive, select only the records you want to archive and/or delete

- a. Choose the CO / Contact field(s)
b. Click on the plus symbol to Add the field(s)

Note: You can select up to 250 fields



The screenshot shows the 'Fields to Archive' form. It has two dropdown menus: 'CO Field' with the placeholder '- Select a CO Field -' and 'Contact Field' with the placeholder '- Select one -'. To the right of each dropdown is a plus icon. Below these is a section titled 'Selected Fields' which currently says 'No fields selected yet.' At the bottom are two buttons: 'Save Settings' and 'Revert Changes'.

- Make sure you click on ‘Save Settings’ to save your configuration, if you make any undesired changes after you can click on ‘Revert Changes’ to go back to the last saved configuration.
- The ‘Logs’ Tab is pretty self-explanatory as shown in the snapshot below:



The screenshot shows the 'Logs' tab in the 'Configurations' section. It has a header that says 'This section will show the executions Logs for this Cloud App. Logs older than 3 months will be deleted.' Below this is a 'Show' dropdown menu set to 'All logs'. Underneath is a label 'Within the following timeframe' followed by two empty text input boxes separated by the word 'and'. Below these inputs are two buttons: 'Get Logs' and 'Clear Values'. At the bottom, it says 'No logs to display, select a criteria from above and click 'Get Logs'.'

That's all, Save the Program put some COs using a Listener or CO Cloud Feeder in it and see the CO Deleter with Archive in Action!

Note: Please make sure you must indicate the 'email address' field in each CO Set so that the app finds the records to be deleted

The screenshot shows the 'Custom Object' configuration interface. At the top, there's a header bar with 'Custom Object' and navigation links for 'Custom Object', 'Header Fields', and 'Reporting'. Below the header, the title 'Cloud Connector Portal Test (819044 Custom Object Records)' is displayed. The main section is titled 'Custom Object details' and contains several fields: 'Display Name' (Cloud Connector Portal Test), 'Description' (empty), 'Type' (Custom Data Objects), 'Display Name Field' (Email Address), 'Unique Code Field (100 Character Limit)' (none), and 'Email Address Field' (Email Address). The 'Email Address Field' is highlighted with a red rectangle. Below these fields, it shows 'Total Number of Custom Object Records' as 819044 with a 'View Custom Object Record' link. The 'Custom Object parameters' section includes 'Group By Field' (none) and 'Default Entity Mapping used in upload' (Contacts). The 'Entity Type' is set to 'Contacts' and the 'Entity Field' is 'Email Address'. The 'Header Fields' section is at the bottom.

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 App, 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.