

CO Lookup Cloud Action Documentation

Table of Contents

- [Purpose of the CO Lookup Cloud Action](#)
- [Set-up in Oracle Eloqua](#)
- [How to use](#)
- [License Information](#)

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.

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 Lookup

Accept and Install



4Thought Marketing Cloud Apps

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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.

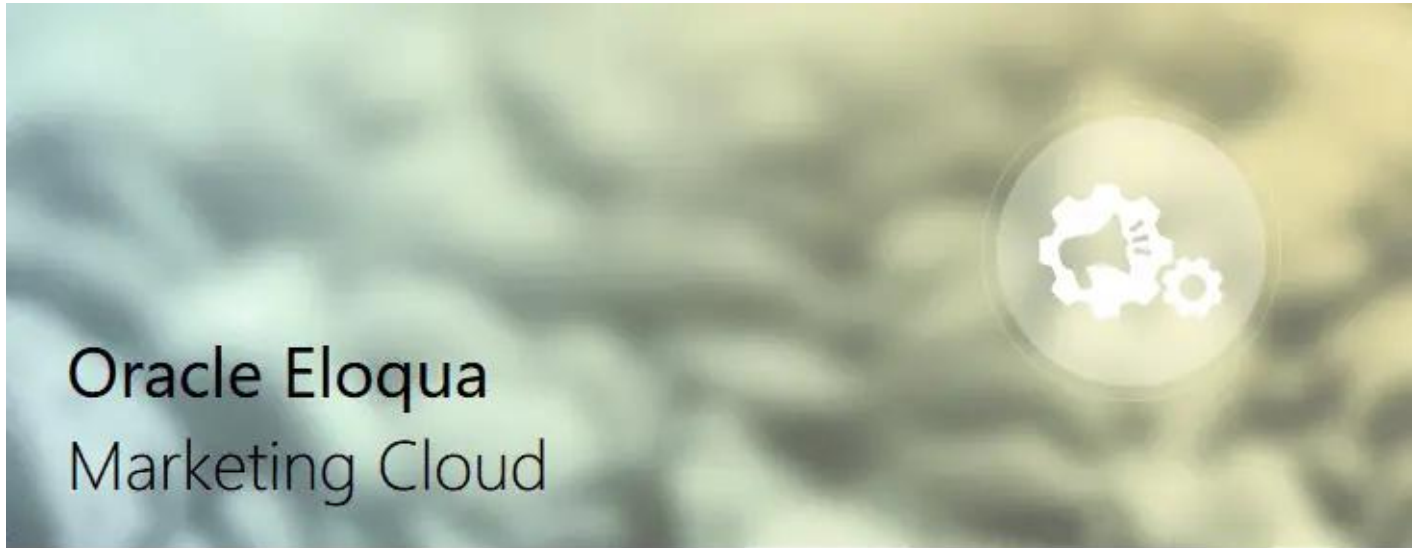
Services



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.

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



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

Append Multiple Fields

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Populate a third field from the value in 2 fields and a string value (e.g. Doe, John from First Name = John, Last Name = Doe, and the string value ", "

Sign In

Cancel

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

My Apps

co look

Get More Apps

Sort by Name ▾



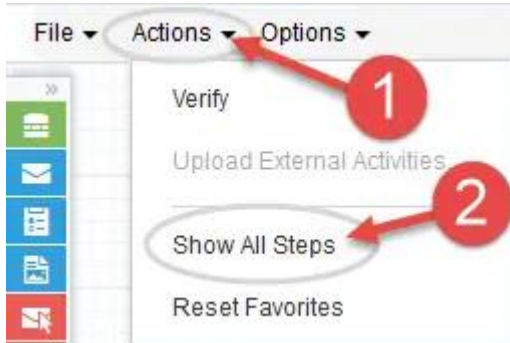
CO Lookup

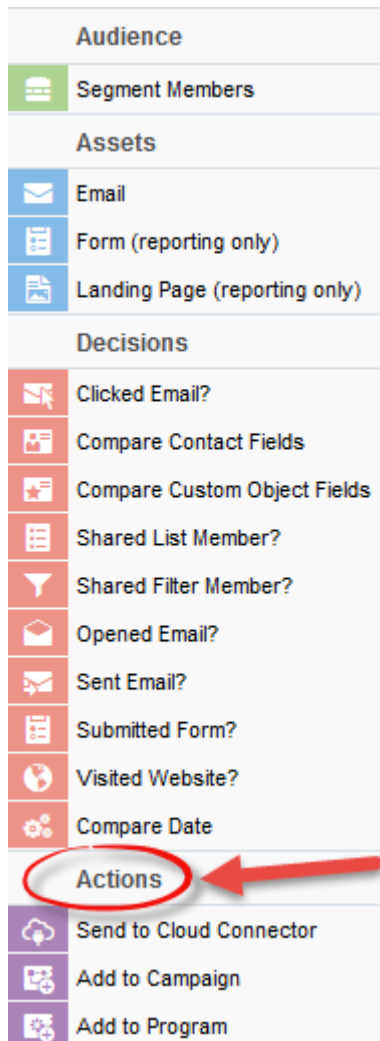
Uses a Contact Field to run a lookup against a given CO Set, from the matching CO Record, writes back the corresponding values on the Contact table.

How to use

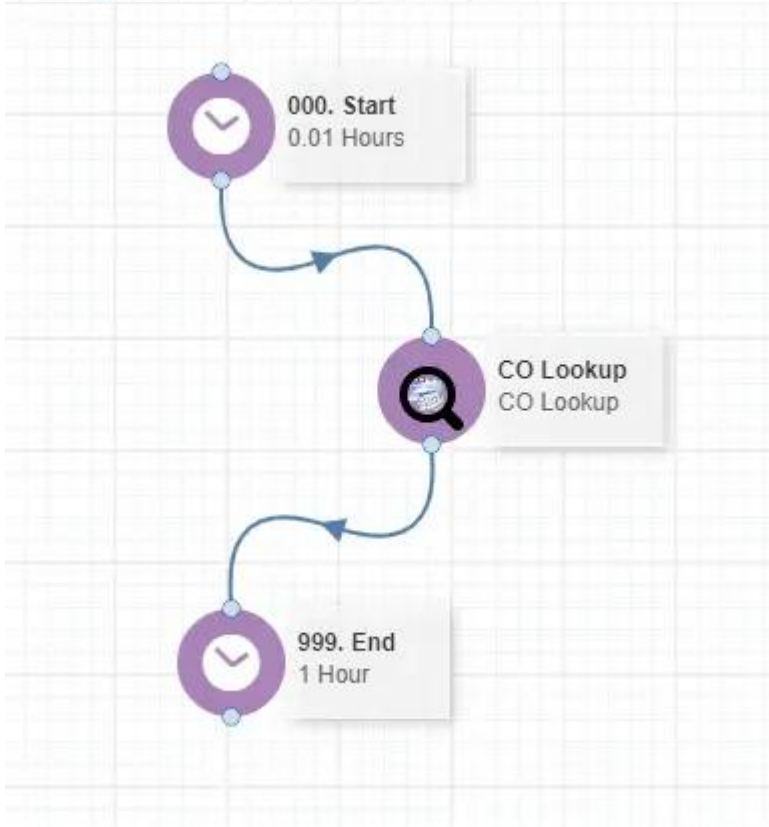
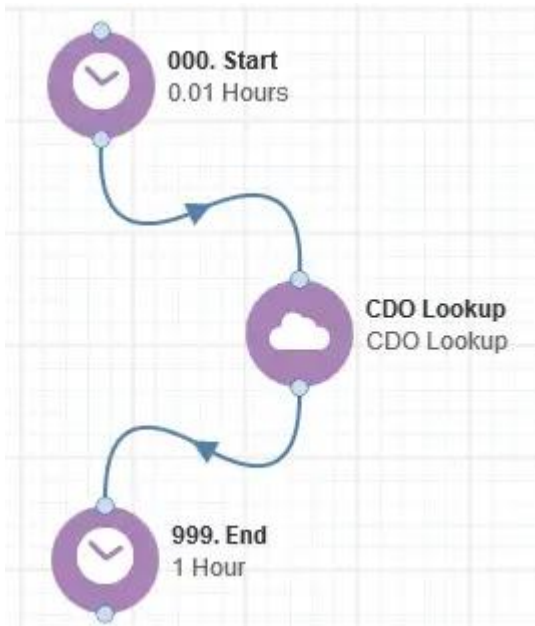
The following instructions show a basic/simple usage. You can incorporate this Cloud Action to any existing Campaign or Program Canvas.

- Create/Open a Campaign or Program Canvas
- 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).

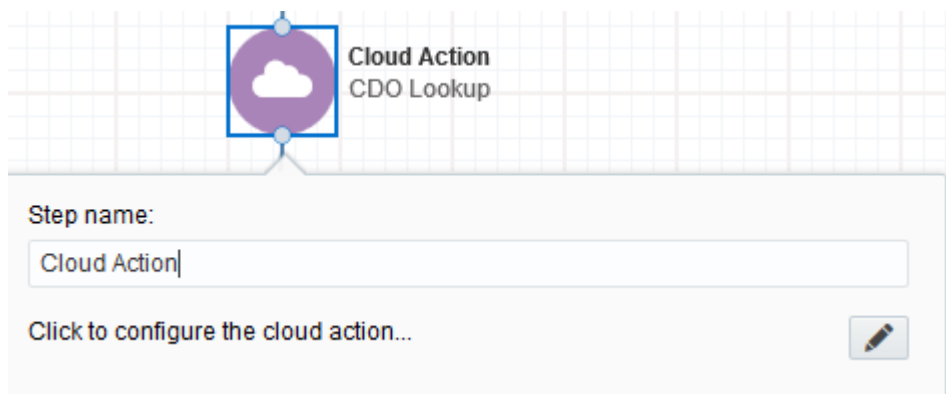




- Drag and drop the cloud action to the canvas area. Connect the corresponding elements to the dropped cloud action



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



Cloud Action
CDO Lookup

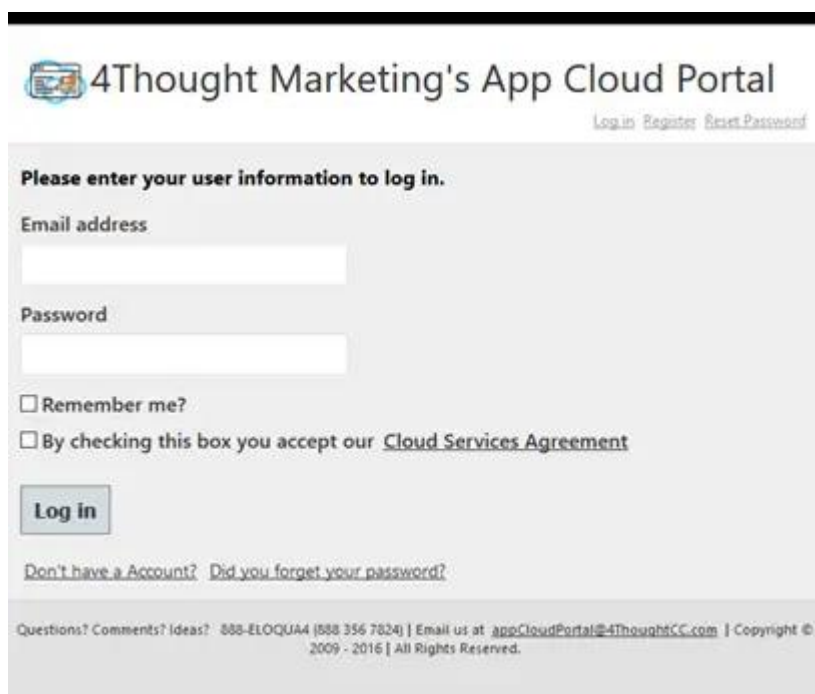
Step name:

Cloud Action

Click to configure the cloud action...

- 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 CDO Set to run the lookup against.
- Select the CDO Field to run the lookup against the previous Contact Field.
- On the following section, you indicate the fields to move from the Matched CDO 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:

CO Set to run lookup:

CO Field to Match:

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

CO Field:

Default Value:

Contact Field:

[Add Mapping](#)

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

Saved Mappings

1

CO Field:

Default Value:

Contact Field:



2

CO Field:

Default Value:

Contact Field:



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 [kough@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.
-



100. Cloud Action CDO Lookup

Step name:

100. Cloud Action

Click to configure the cloud action...



1

☒ Automatically route contacts with errors from cloud app

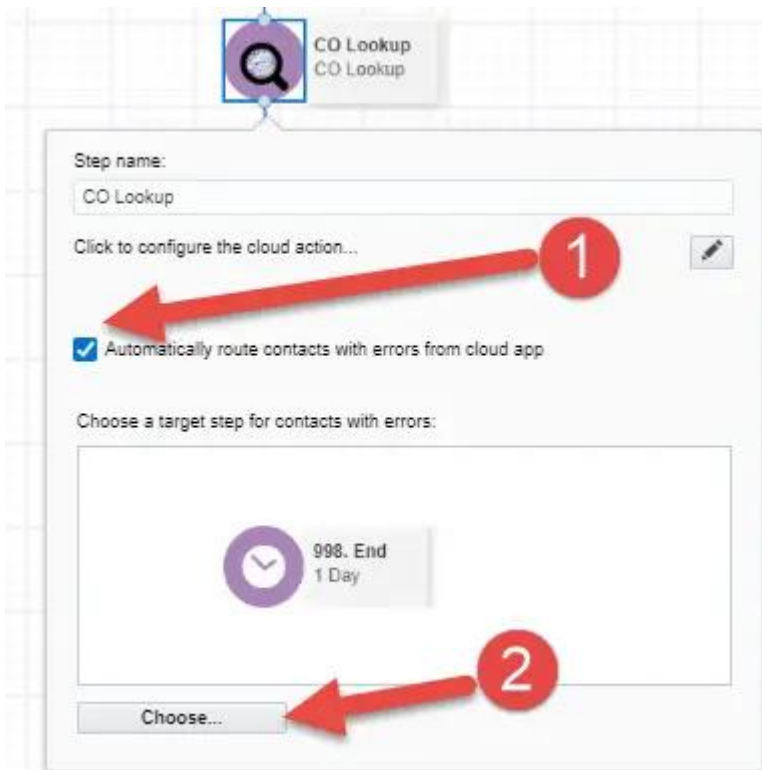
Choose a target step for contacts with errors:



998. Error
1 Day

Choose...

2



- a. That's all. Activate the Campaign or Program, put some contacts in it and see the CDO 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.