Eloqua SMS Opt Out Program User Guide

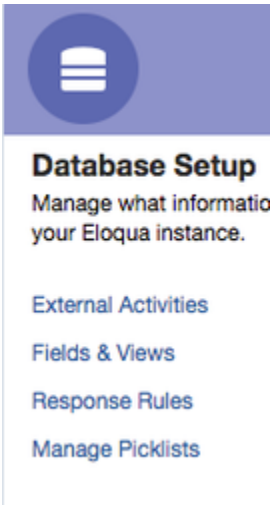
It's vital for clients using our SMS application to have an SMS opt out program setup in their account. When customers text into a phone number on one of our client's accounts with a keyword referencing their desire to opt-out of SMS messaging, the client MUST comply with this request. Examples: Stop, Cancel, Opt-out, etc..

When onboarding new clients for the SMS application, we typically will setup the opt out program for them. This guide will walk you through how to setup that program in your Eloqua account.

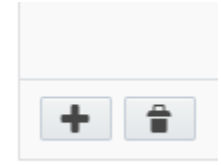
The first step for setting up the SMS Opt-Out program will be adding a contact field called 'SMS Opt Out'

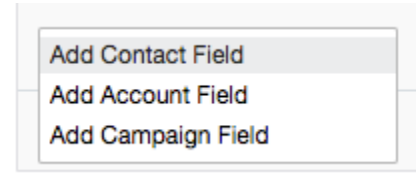
1. Log into Eloqua
2. Click the 'Settings' gear on the top right

3. Click 'Fields and Views' under the Database Setup section



4. On the next page, click the plus sign on the bottom left and then click 'Add Contact Field'

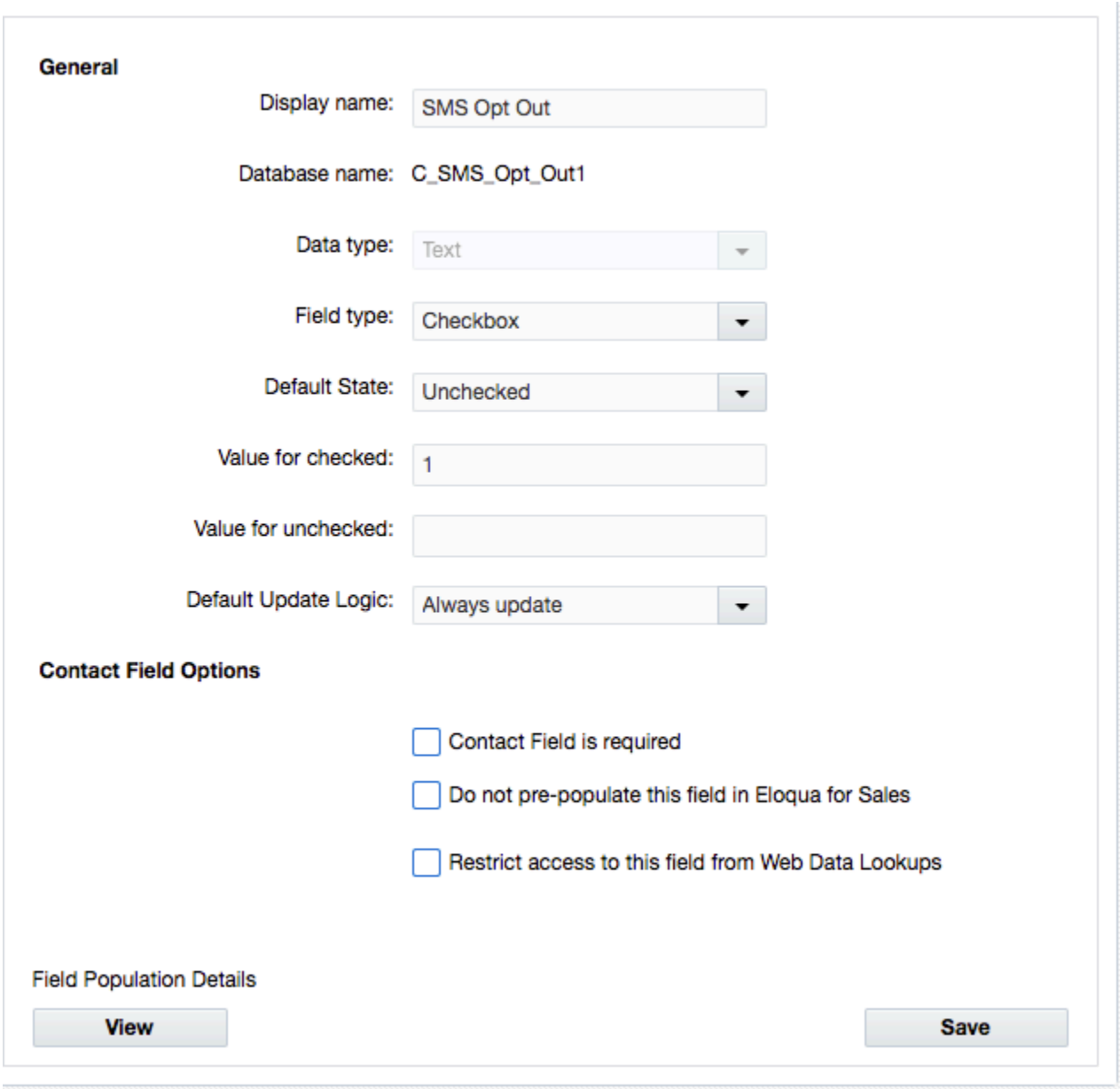




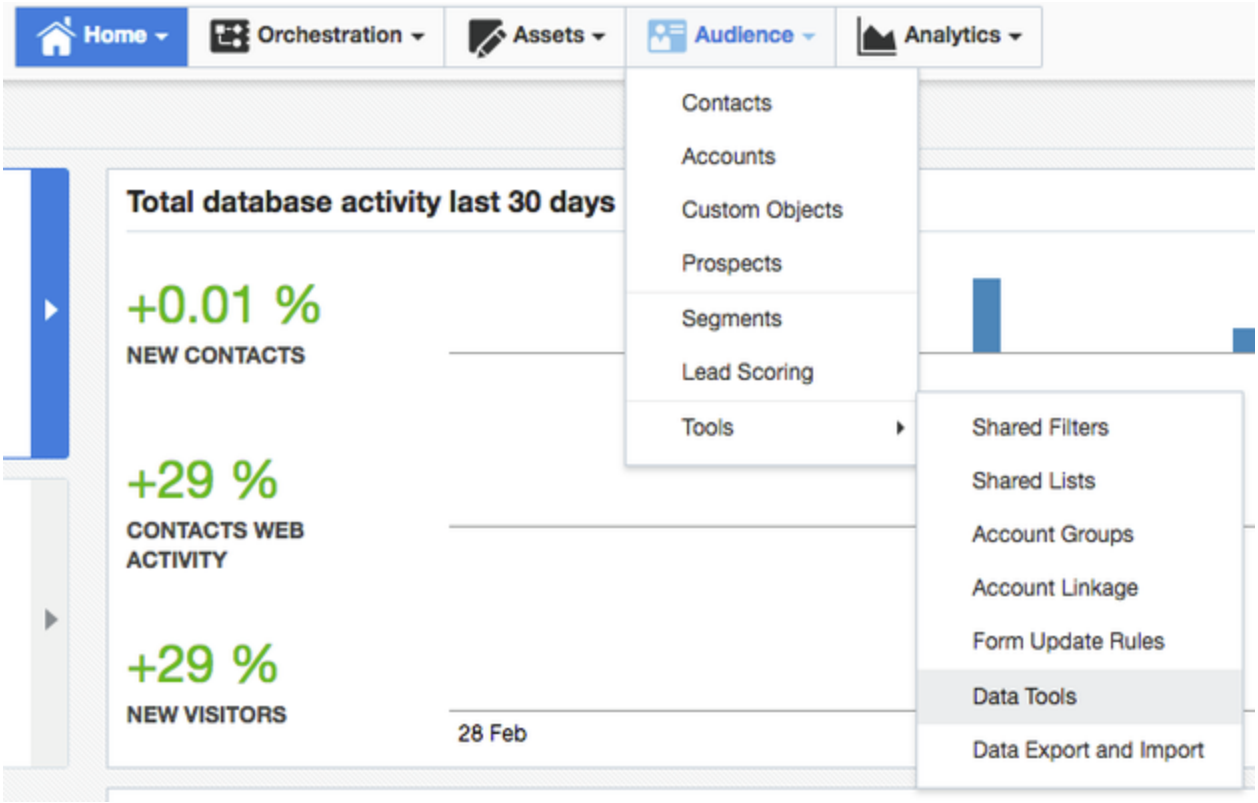
5. This will pull up edit screen for your new Contact Field.

   Display Name: SMS Opt Out
   Data Type: Text
   Field Type: Checkbox
   Default State: Unchecked
   Value for Checked: 1
   *Leave Value for Unchecked BLANK
   Default Update Logic: Always Update

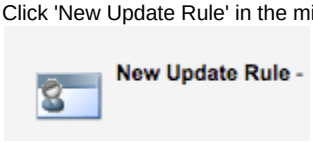
Then click 'Save'.



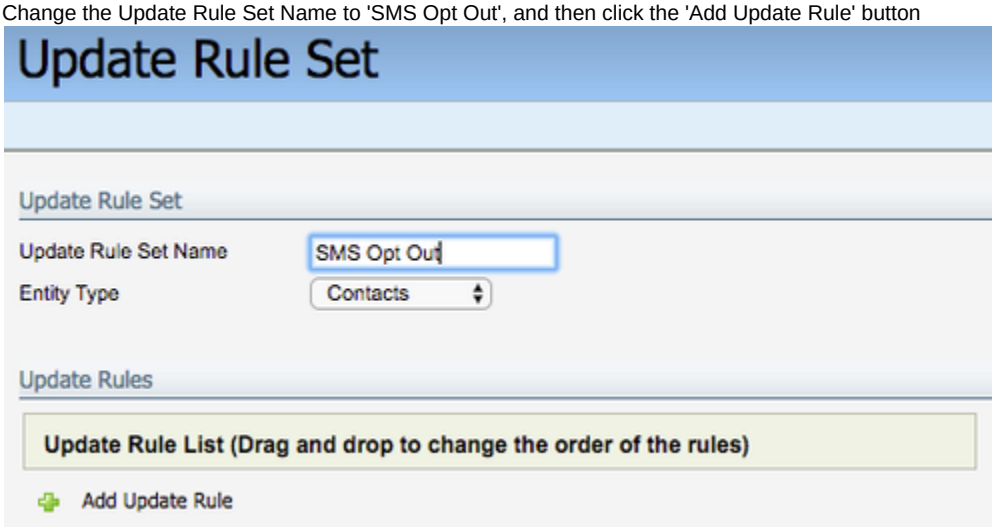
6. You now have your SMS Opt Out contact field setup. The next step will be creating the Update Rule for the Opt Out Program. To do this, at the top of the page hover over Audience > Tools > Data Tools (Click Data Tools).



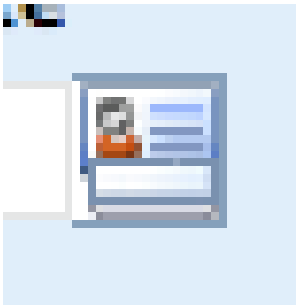
7. Click 'New Update Rule' in the middle of the page.



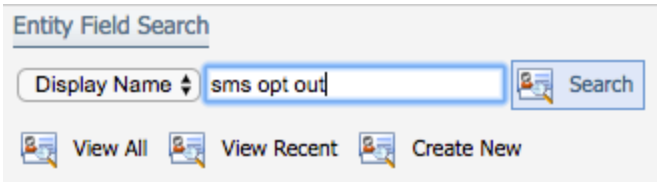
8. Change the Update Rule Set Name to 'SMS Opt Out', and then click the 'Add Update Rule' button



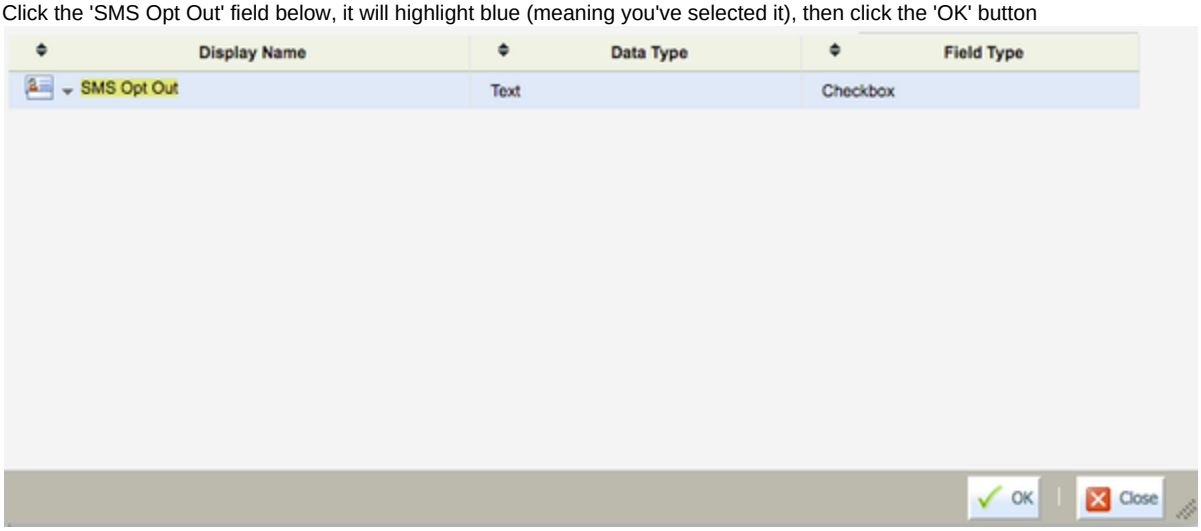
9. Click the small ID button that shows in the blue pop-up box to select a field to update



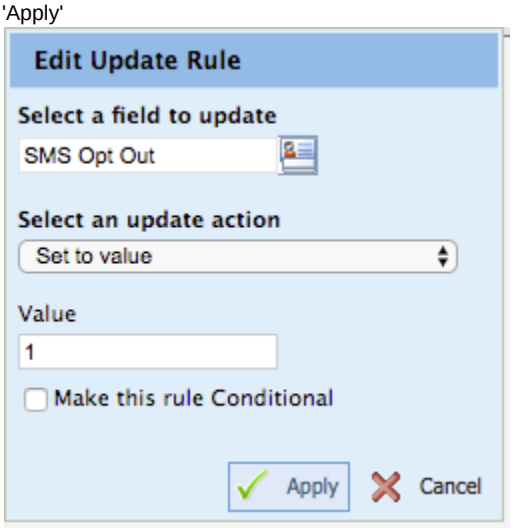
10. Type 'SMS Opt Out' in the search box, and then click 'Search'



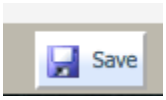
11. Click the 'SMS Opt Out' field below, it will highlight blue (meaning you've selected it), then click the 'OK' button



12. In the blue box, select 'Set to value' from the Select An Update Action dropdown menu, and input '1' in the Value text box. Then click 'Apply'

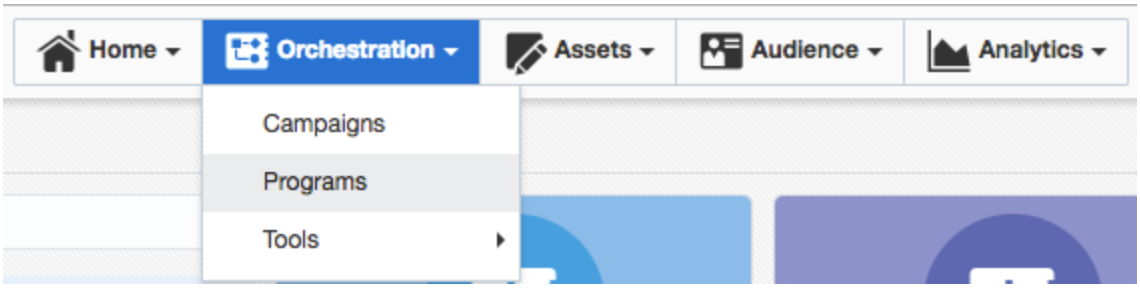


13. After you've clicked 'Apply', click the 'Save' button on the bottom right. Your update rule has now been created.

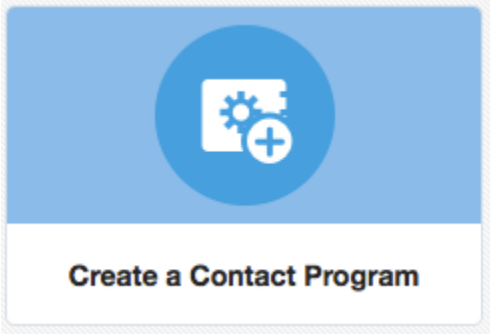


Creating the Opt Out Program

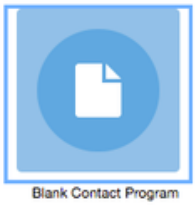
14. Now you will setup the actual Opt Out Program. Begin by hovering over 'Orchestration' on the top of the page and click 'Programs'

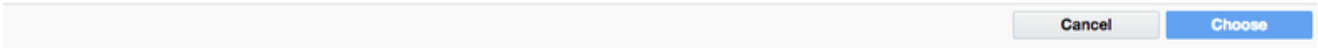


15. Click Create a new Contact Program

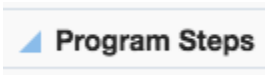


16. Select the 'Blank Contact Program' and then click 'Choose' on the bottom right corner



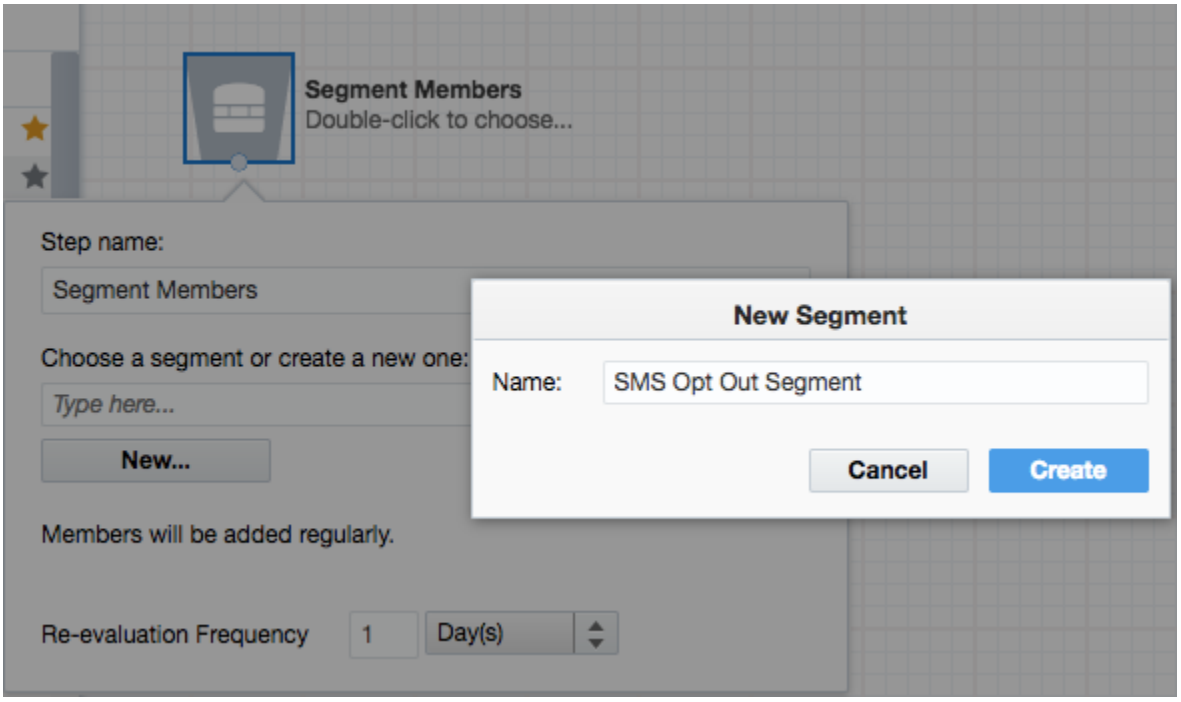


17. Click the arrow next to 'Program Steps' to collapse full list of program steps

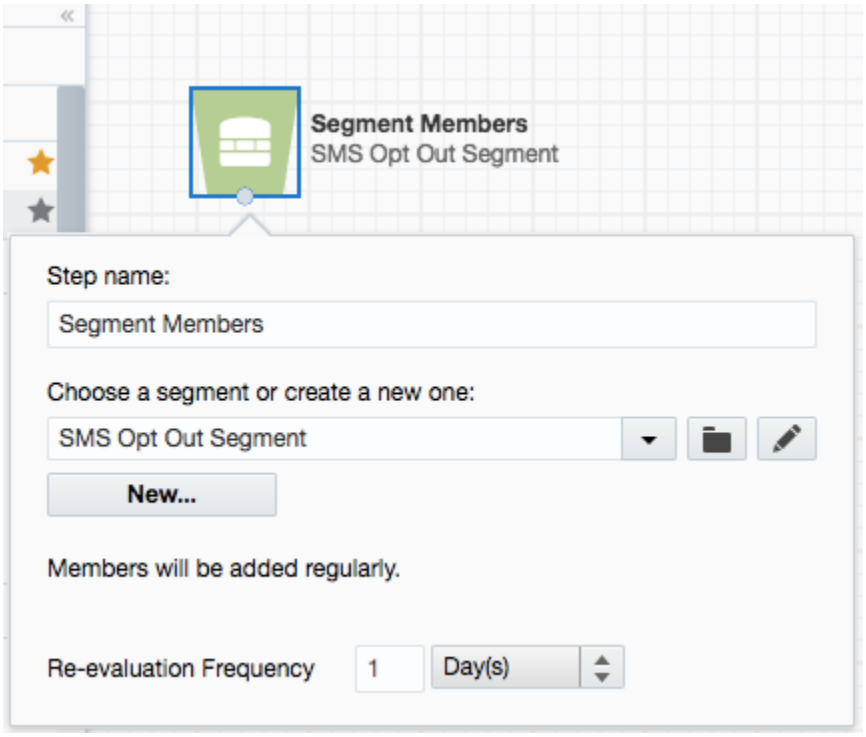


18. Drag and drop a Segment Member step onto the Program Canvas

19. Double click the Segment Members step on the canvas, and then click the 'New' button to create a new segment. Title the segment 'SMS Opt Out Segment', then click 'Create'.

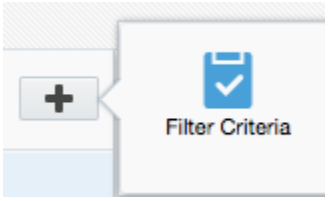


20. Once you've titled the new segment, click the pencil icon to edit the new segment.

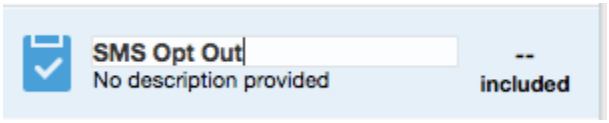


21. On this page you add the shared filter you created to the segment. To do this, click the plus sign on the top left and choose 'Filter

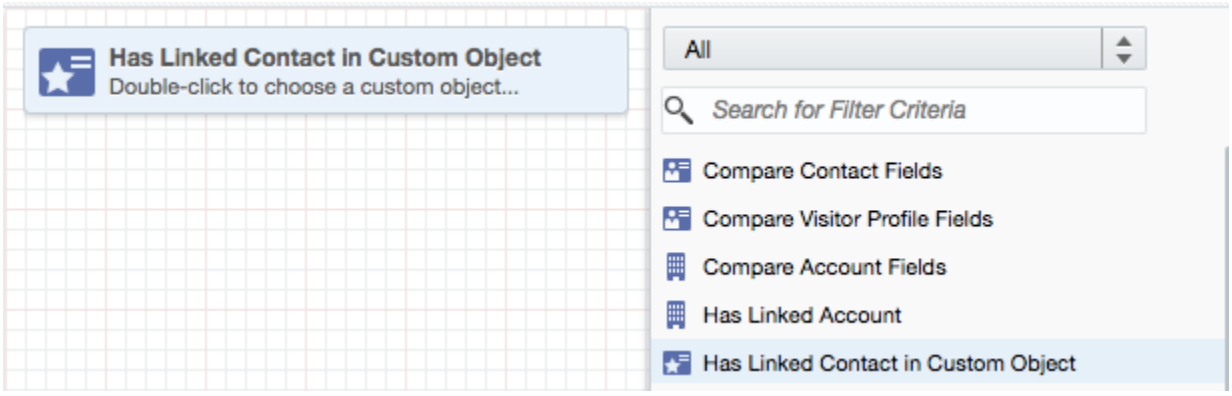
Criteria'.



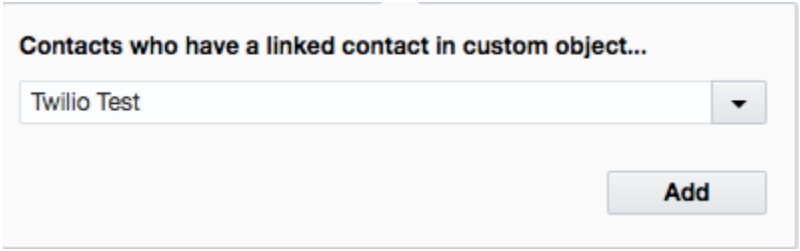
22. Double click on the title of the new Filter Criteria and change the name to 'SMS Opt Out'.



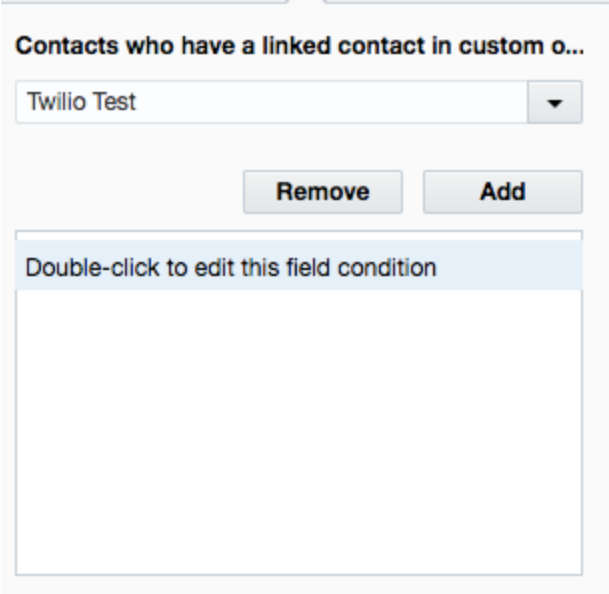
23. When you have the filter criteria selected, drag and drop a 'Has Linked Contact in Custom Object' filter onto the canvas.



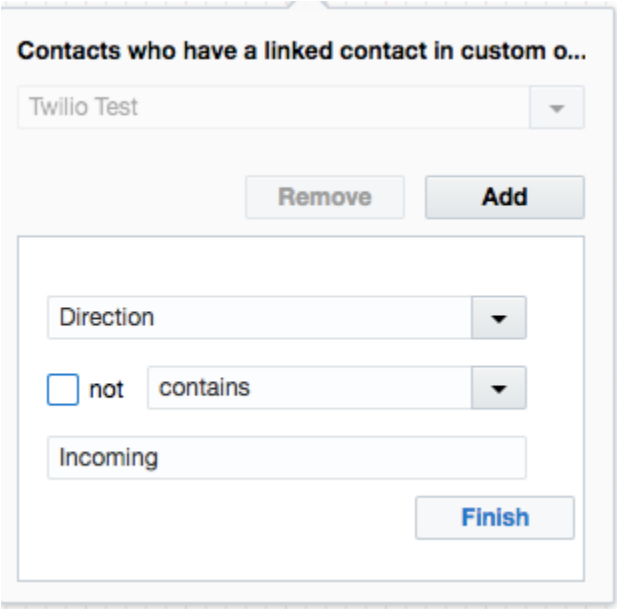
24. Double click on the filter and choose your Twilio SMS Custom Object you've created for the SMS app



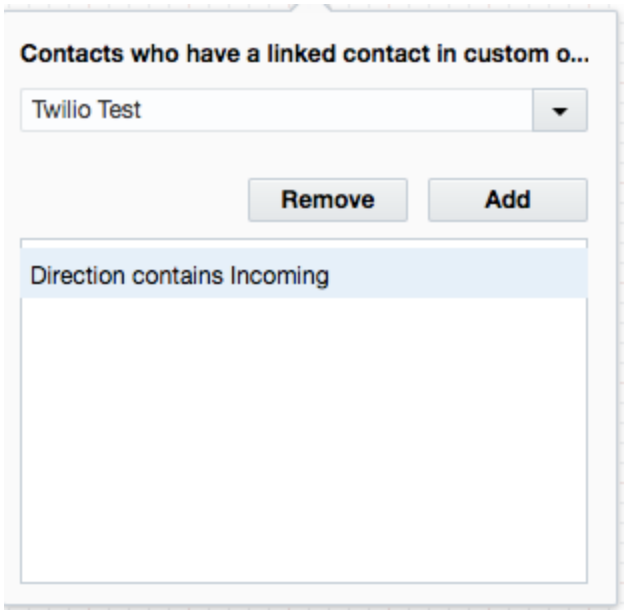
25. Click the 'Add' button on the pop up window to add a Field Condition, then double click on the listed Field Condition to edit.



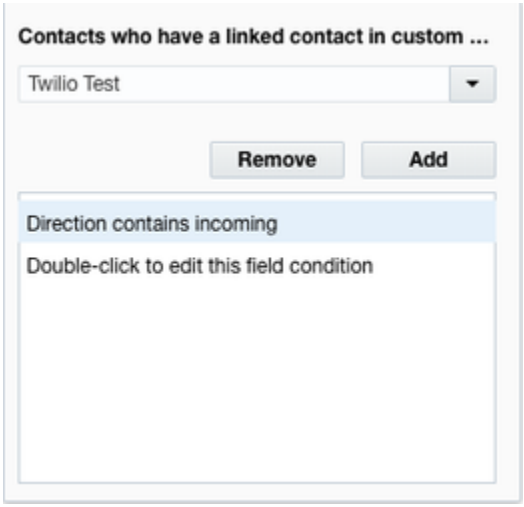
26. Choose 'Direction' for the Custom Object field you're wanting the Field Condition to check for, then choose 'Contains' for the second dropdown, and enter 'Incoming'. Click 'Finish' when completed.



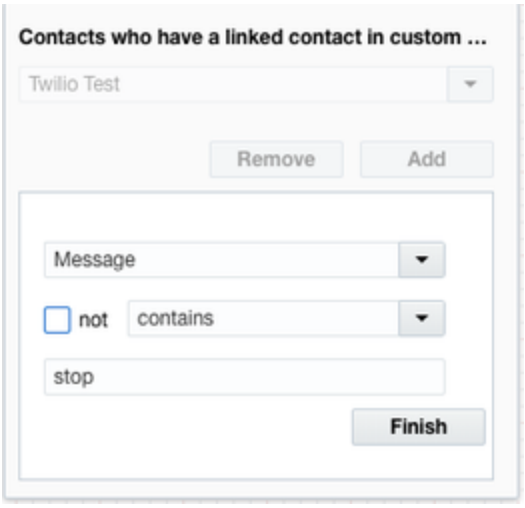
27. The new Field Condition you created will now search in the 'Direction' field in your Twilio Custom Object for the word 'Incoming' (this means the segment will only be searching incoming messages rather than outgoing).



28. Click "Add" again to create a second field condition and double click on the listed Field Condition to edit.

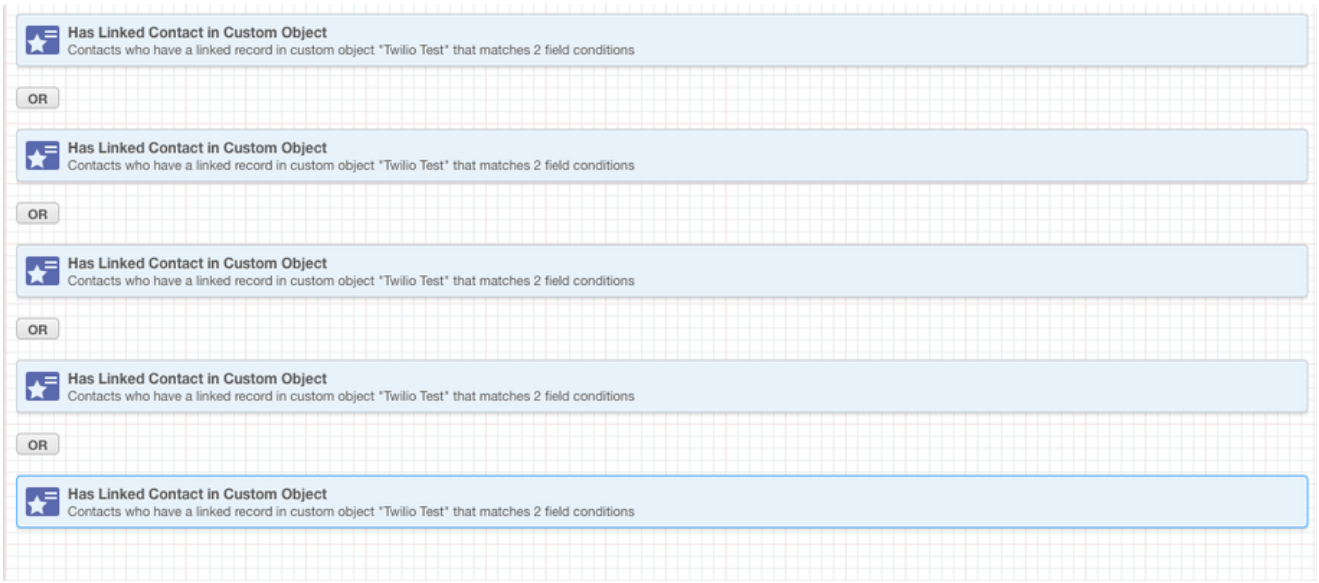


29. Choose 'Message' for the Custom Object field you're wanting the Field Condition to check for, then choose 'Contains' for the second dropdown, and enter 'Stop'. Click 'Finish' when completed.

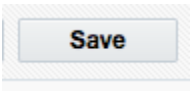


28. Once this is done, repeat steps 23-29 again. On Step 29 have the Filter Criteria check the 'Message' field in of the CDO for the following universal opt out keywords: STOP, END, CANCEL, UNSUBSCRIBE, and QUIT. Follow these steps for each opt out keyword you would like the Field Condition to check for.

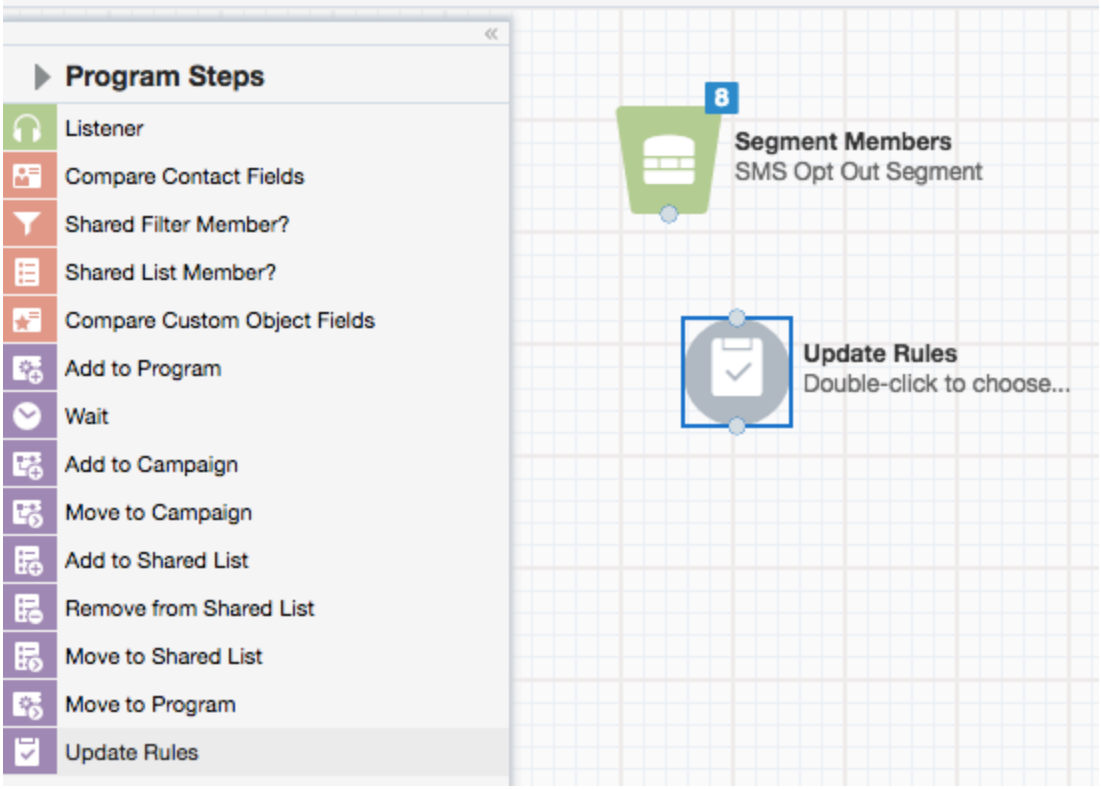
Example:



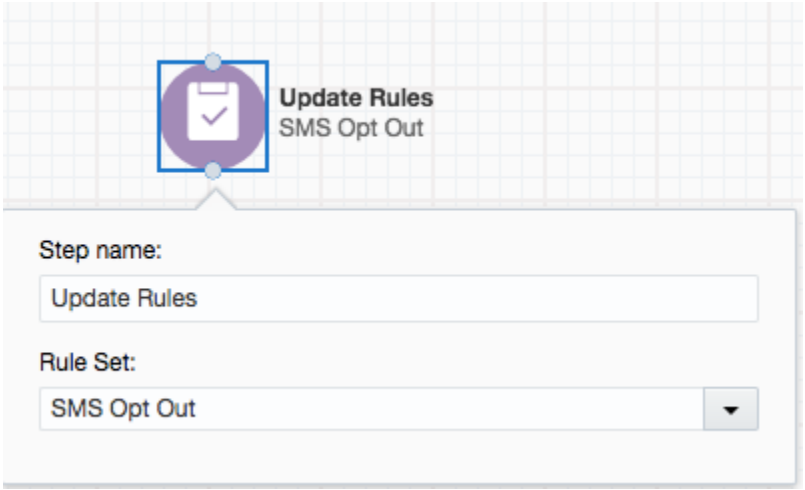
31. Once this is done, click 'Save' on the top right.



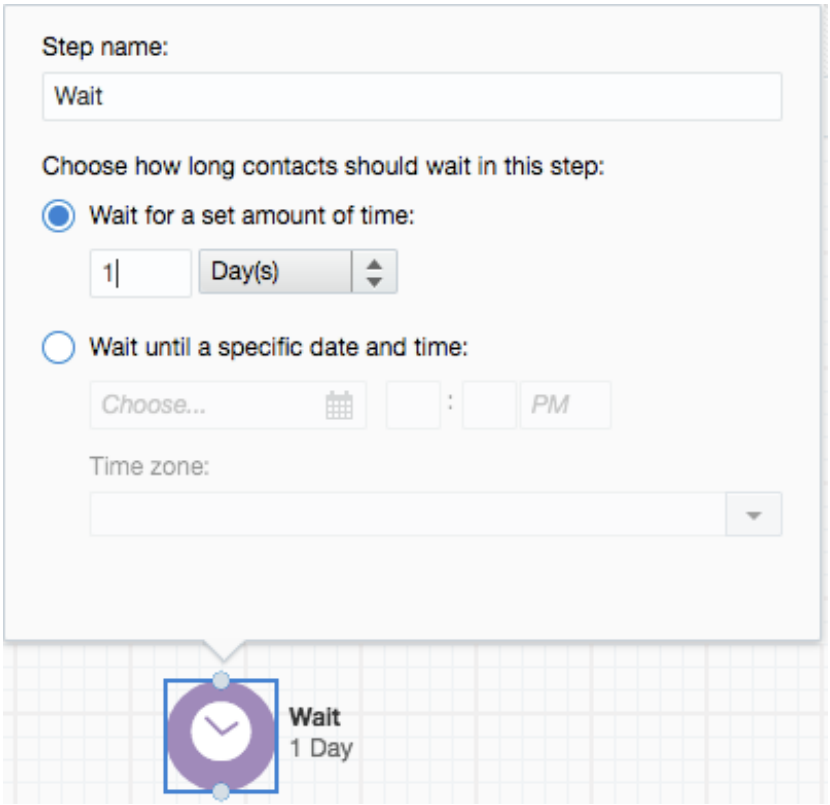
32. Now that the segment is created, you will now add the update rule you created at the beginning to the canvas. Go back to the Program Canvas and drag and drop an 'Update Rule' step onto the canvas below the Segment Step.



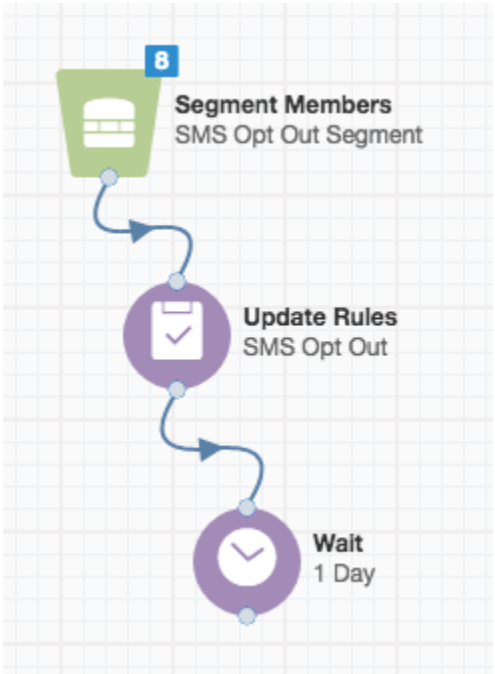
33. Double click the update rule step and select the 'SMS Opt Out' update rule you created.



34. Finally, drag a 'Wait' step onto the program canvas below the Update Rule. Double-click the wait step to change the length to 1 day.



35. Once you've done this, link all of the steps together by connecting the dots at the top and bottom of each step, like so:



36. Double click the name of the program on the top left, currently titled 'Untitled Program', and change the name to 'SMS Opt Out Program'

37. Click 'Save' on the top right and then click 'Activate'. Your SMS Opt Out Program is now live

38. Now, when setting up a SMS configuration, on the last page of the configuration map the 'Opt-Out' dropdown menu to your 'SMS Opt Out' field. The application will check to see if the field is populated before sending a message out. If it is populated (meaning that user texted in an opt-out keyword), the message will not be sent.