Oracle Eloqua Engage

User Guide
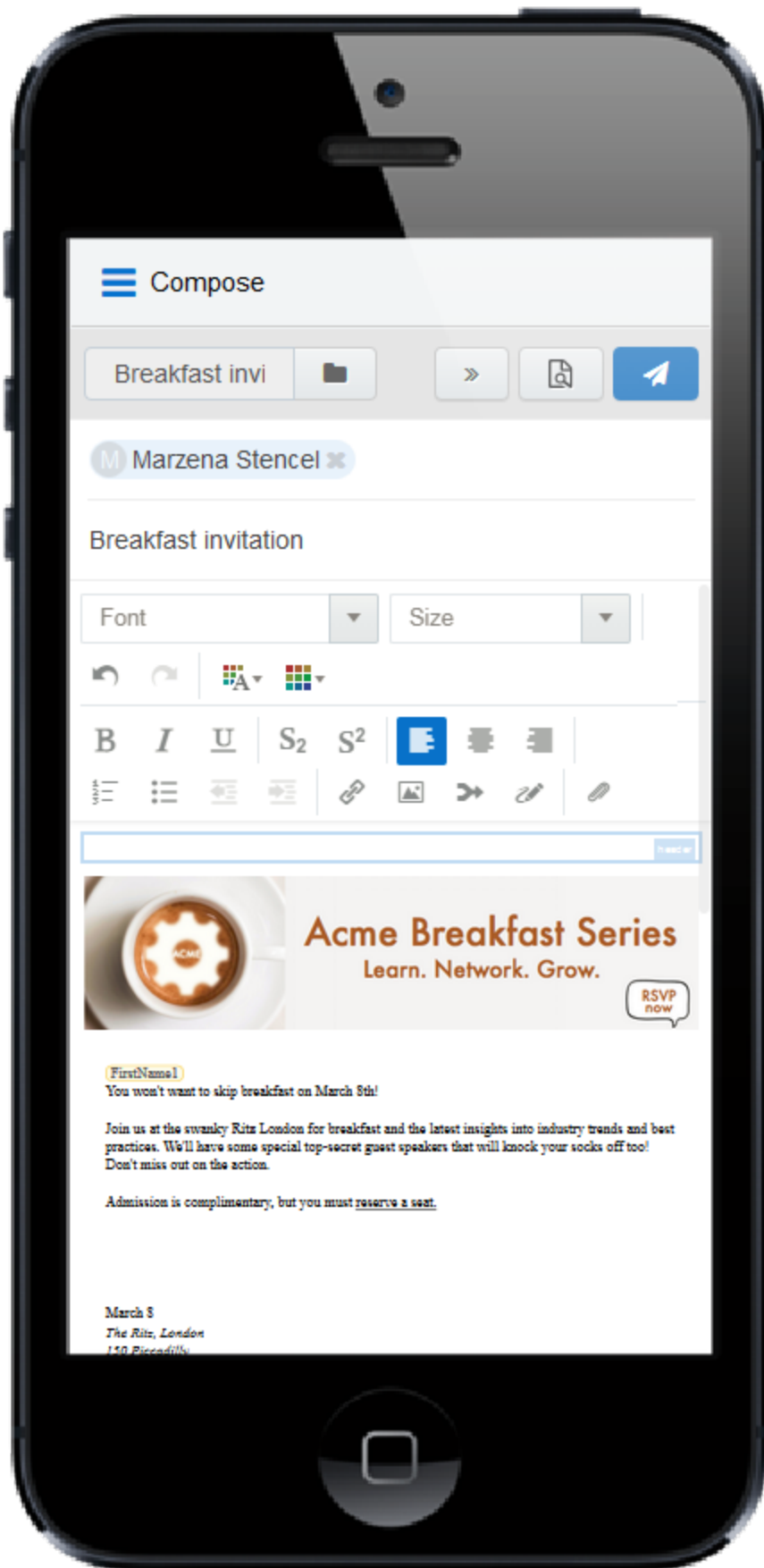
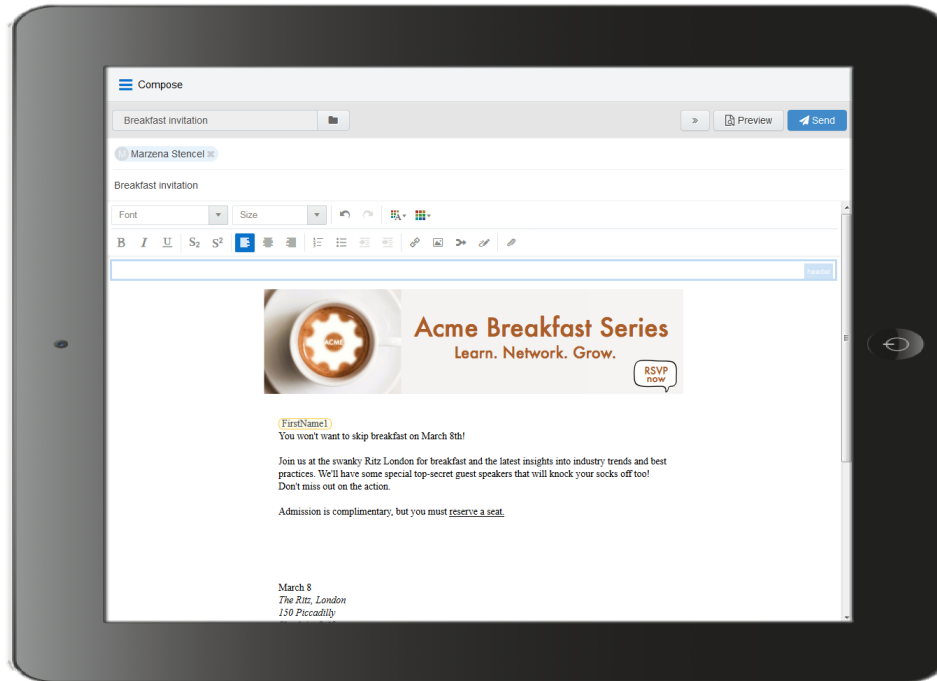# Contents

1 Engage

Engage is one of Eloqua's Sales Tools. It alleviates the need to constantly recreate emails that are frequently used throughout the sales process. Ensuring sales professionals are using marketing-approved messaging, branding and content, it also allows for personalization and tracking of each email sent. Engage's responsive design makes it easy for sales professionals to send relevant, trackable emails on the go from their mobile phones and tablets.

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Acme Breakfast Series
Learn. Network. Grow.

RSVP now

[FirstName1]
You won't want to skip breakfast on March 8th!

Join us at the swanky Ritz London for breakfast and the latest insights into industry trends and best practices. We'll have some special top-secret guest speakers that will knock your socks off too! Don't miss out on the action.

Admission is complimentary, but you must reserve a seat.

March 8
The Ritz, London
150 Piccadilly

1.0.1 What's in it for the marketing side of the house?

- Create your "sales-emails" in the same place you create your regular marketing campaign emails.

- Control the marketing content your sales team sends out to their prospects.

- When sales adds a new contact on the fly, it is synchronized with Eloqua and your CRM.

- Emails sent through Engage are recorded in Eloqua and within the CRM and Profiler on the contact record.

Learn more by watching this video: https://www.youtube.com/playlist?list=PLw7GyH-Hj8cN_oEV8epjsq-PB0uRUOC4E

 Note: Before you can access the responsive version of Engage, it must be installed in your Eloqua instance. Once installed, the customer administrator can

customize the options that appear to those using the program. Learn more about

installing and configuring Engage.

2 Installing Engage

Before you can use Engage you must install the app and configure the settings for your Oracle Eloqua instance.

> 🛈 **Important**: The installation process must be done by a user with client administrator rights.

To install the Engage app:

1. Follow the Engage installation URL below:

    https://login.eloqua.com/Apps/Cloud/Admin/Catalog/Add/d321bf52-fd08-4b3f-b5fa-96448cc466b9/00-14-9C-60-13-3C-AA-E3-2E-9A-2B-E9-7D-B1-B3-B6

2. Log in with your Eloqua credentials, if required.

3. Click **Accept and Install** to add the app to your *Apps* list.

4. Configure *Engage Global Settings*.

a. Select the check boxes next to the options that you want to enable for your instance.

- *Recipients*
  - **Enable recipient autocompletion**: When enabled, Engage searches your Oracle Eloqua contacts as their names are entered in the recipient list in an email. This option is disabled by default.

  - **Restrict the maximum number of recipients to**: Specify the maximum number of recipients a single email can be sent to. This option is disabled by default.

- *Email Creation*
  - **Allow use of blank templates**: When enabled, Engage users can create emails using the blank email option. When disabled, Engage users can only use existing Oracle Eloqua emails saved to Engage as templates. This option is enabled by default.

  - **Allow creation of shared templates**: When enabled, Engage users with appropriate permissions can save Engage emails and make them accessible to other users. This option is enabled by default. All users are able to save Engage emails for private use.

- *Content*
  - **Allow images**: When enabled, Engage users can insert images in emails. Images are stored in the Oracle Eloqua image library and require appropriate asset permissions. This option is enabled by default. Learn more about inserting images.

- **Allow attachments**: When enabled, Engage users can insert attachments in emails. Attachments are stored in Oracle Eloqua's File Storage library and require appropriate asset permissions. This option is enabled by default. Learn more about inserting attachments.

- **Enable field merges**: When enabled, Engage users can insert field merges in emails. Field merges are stored in Eloqua's File Storage library and require appropriate asset permissions. This option is enabled by default. Learn more about inserting field merges.

- *Text Formatting*
  - **Enable font colors and font highlighting**: When enabled, Engage users can modify the font color and highlight selected text. This option is enabled by default.

  - **Enable font and font size selection**: When enabled, Engage users can modify the style and size of their text. This option is enabled by default.

- *Template Sorting*
  - **Recently Modified** (the default): When enabled, templates are sorted on the *All* and *My* tabs of Engage's *Select a Template* window according to the date when they were modified. Users can alternatively click the refine icon and select **Alphabetical**.

  - **Alphabetical**: When enabled, templates are sorted alphabetically on the *All* and *My* tabs of the *Select a Template* window. Users can alternatively click the refine icon and select **Recently Modified**.

b. Click **Save**.

5. Click **Accept** or switch users.

The app is now installed and can be viewed in your *Apps* list (**Settings** ⚙ > **Apps**, under the *Platform Extensions* section). Select an app to view a description, modify the configuration settings, reinstall, or uninstall it. You can also check its status and dependencies.

> ⚠ **Warning**: To modify configuration settings, navigate to *Apps*, select your app, and click the **Configure** icon ⚙. Selecting the **Reinstall** icon ⬇ will force you to go

through the entire configuration process again. The app will be unavailable for all users during the reinstall.

3 Accessing Engage

> 💡 **Note**: Before you can access Engage it must be installed in your Oracle Eloqua instance. Once installed, the customer administrator can customize the options that appear to those using the program. Learn more about installing and configuring Engage.

Engage can be accessed in the following ways :

- **Direct**: `https://login.eloqua.com/apps/salesTools/engage/compose`

- **Autologin**: `https://login.eloqua.com/autoLogin?LoginPrefix={prefix}&Url=/apps/salesTools/engage/compose`

- **SAML**: `https://login.eloqua.com/auth/saml2/autologin?LoginPrefix={prefix}&ReturnUrl=/apps/salesTools/engage/compose`

- **SFDC IDP**: `https://{podURL}/sso/sfdc/v1/svp.aspx?LP={prefix}&RU=/apps/salesTools/engage/compose`

  Replace {*podURL*} with the URL in your browser after you have logged in successfully to Eloqua (for example, `secure.p01.eloqua.com`). Click here for additional information about how to determine your POD.

  `LoginPrefix` values are a four-character code for the company name that you enter in the Company field on the login page. To add this parameter to your URL, enter `LoginPrefix={prefix}` where {*prefix*} is replaced with the four characters company name. You can obtain your company's login prefix in Eloqua by navigating to Settings > Setup > Company Defaults.

Using the access URLs above, you can append additional information to populate your recipients and select an email template:

- Open the Template Chooser with a specific recipient: ...`?emailAddress=`
  `{emailaddress}`

- Open a blank email: ...`?blank=true`

  This option opens a blank email if the creation of blank emails is allowed in your instance
  (managed in Engage Global Settings). If the creation of blank emails is not allowed, the email
  chooser opens and displays available templates (a blank email option is not available).

- Open a blank personal email with a specific recipient: ...`?blank=true&emailAddress=`
  `{emailaddress}`

- Open a specific template: ...`?emailId={templateID}`

  To determine the *templateID*, find and open the email you are looking for in Eloqua and refer
  to the URL. The last portion of the URL is the value you substitute into your Engage URL as
  your *templateID*.

  > 📓 **Example**: If the Eloqua URL for the email template is
  > `https://secure.p02.eloqua.com/Main.aspx#emails&id=`**581**, append
  > the following to your engage URL `...?emailId=`**581**. Your full Engage URL looks
  > like this:
  > `https://login.eloqua.com/apps/salesTools/engage/compose?emai`
  > `lId=581`

- Open a specific template with a recipient: ...`?emailAddress=`
  `{emailaddress}&emailId={templateID}`

- For multiple recipients, use commas or semicolons to separate them:
  - `?emailAddress={emailaddress1},{emailaddress2},{emailaddress3},...`
  - `?emailAddress={emailaddress1};{emailaddress2};{emailaddress3};...`

The first parameter must start with `?`; each parameter is separated by `&`.

👍 **Tip**: If you are using Microsoft Internet Explorer or Microsoft Edge to access the Oracle Eloqua sign in page in an iframe, an addition should be made to trusted sites. Add `https://*.eloqua.com` and the URL of the site where login page (Oracle Eloqua and/or Sales Tools) is being iframed. The browser must be closed fully and restarted before the change is recognized. For additional information, see this Topliners post about Oracle Eloqua login enhancements.

4 Reconfiguring Engage

The options that appear in Engage depend on the settings that were selected when the app was installed. If you would like to re-configure these settings, you must do so through the AppCloud catalog.

> ❶ **Important**: The configuration process must be done by a user with Client Administrator rights.
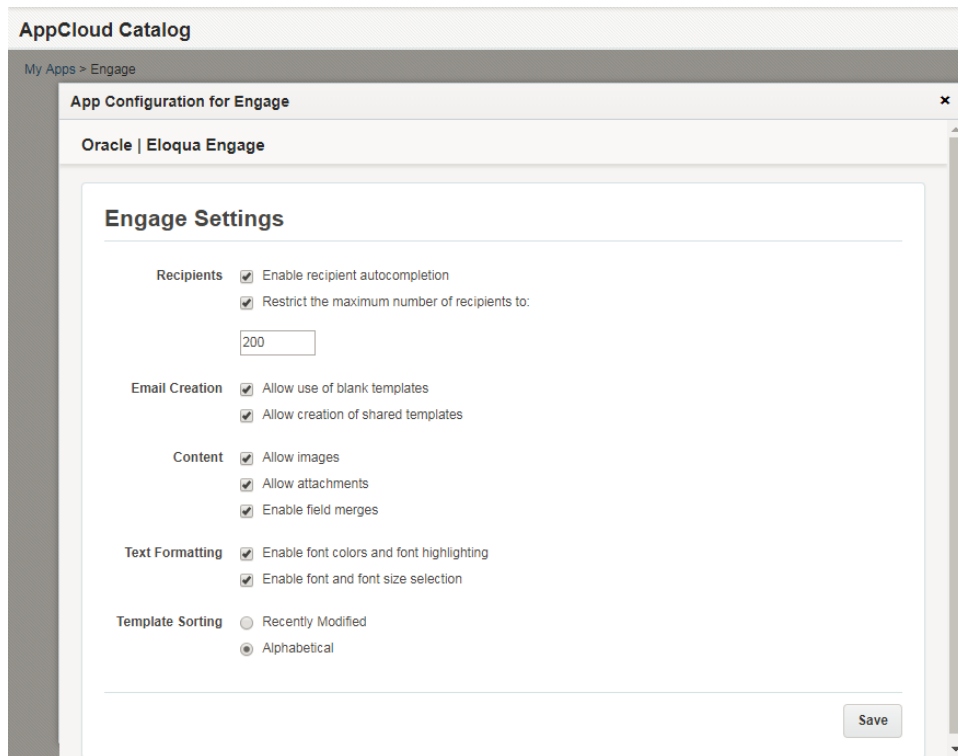
To reconfigure Engage:

1. Log in to Oracle Eloqua.

2. Click **Settings** ⚙.

3. Click **Apps** in the *Platform Extensions* section.

4. Select the Engage app.

5. Click **Configure** ⚙.

> ⚠ **Warning**: Selecting the **Reinstall** option ⬇ for an app will force you to go through the entire installation process again. The app will be unavailable for all users during the reinstall.

6. Reconfigure the settings as needed.

Select the check boxes next to the options that you want to enable for your instance.

- *Recipients*
    - **Enable recipient autocompletion**: When enabled, Engage searches your Oracle Eloqua contacts as their names are entered in the recipient list in an email. This option is disabled by default.

    - **Restrict the maximum number of recipients to**: Specify the maximum number of recipients a single email can be sent to. This option is disabled by default.

- *Email Creation*
    - **Allow use of blank templates**: When enabled, Engage users can create emails using the blank email option. When disabled, Engage users can only use existing Oracle Eloqua emails saved to Engage as templates. This option is enabled by default.

    - **Allow creation of shared templates**: When enabled, Engage users with appropriate permissions can save Engage emails and make them accessible to other users. This option is enabled by default. All users are able to save Engage emails for private use.

- *Content*

  - **Allow images**: When enabled, Engage users can insert images in emails. Images are stored in the Oracle Eloqua image library and require appropriate asset permissions. This option is enabled by default. Learn more about inserting images.

  - **Allow attachments**: When enabled, Engage users can insert attachments in emails. Attachments are stored in Oracle Eloqua's File Storage library and require appropriate asset permissions. This option is enabled by default. Learn more about inserting attachments.

  - **Enable field merges**: When enabled, Engage users can insert field merges in emails. Field merges are stored in Eloqua's File Storage library and require appropriate asset permissions. This option is enabled by default. Learn more about inserting field merges.

- *Text Formatting*

  - **Enable font colors and font highlighting**: When enabled, Engage users can modify the font color and highlight selected text. This option is enabled by default.

  - **Enable font and font size selection**: When enabled, Engage users can modify the style and size of their text. This option is enabled by default.

- *Template Sorting*

  - **Recently Modified** (the default): When enabled, templates are sorted on the *All* and *My* tabs of Engage's *Select a Template* window according to the date when they were modified. Users can alternatively click the refine icon and select **Alphabetical**.

  - **Alphabetical**: When enabled, templates are sorted alphabetically on the *All* and *My* tabs of the *Select a Template* window. Users can alternatively click the refine icon and select **Recently Modified**.

7. Click **Save** to save your settings.

Your configuration settings have been updated. You can modify them at any time.
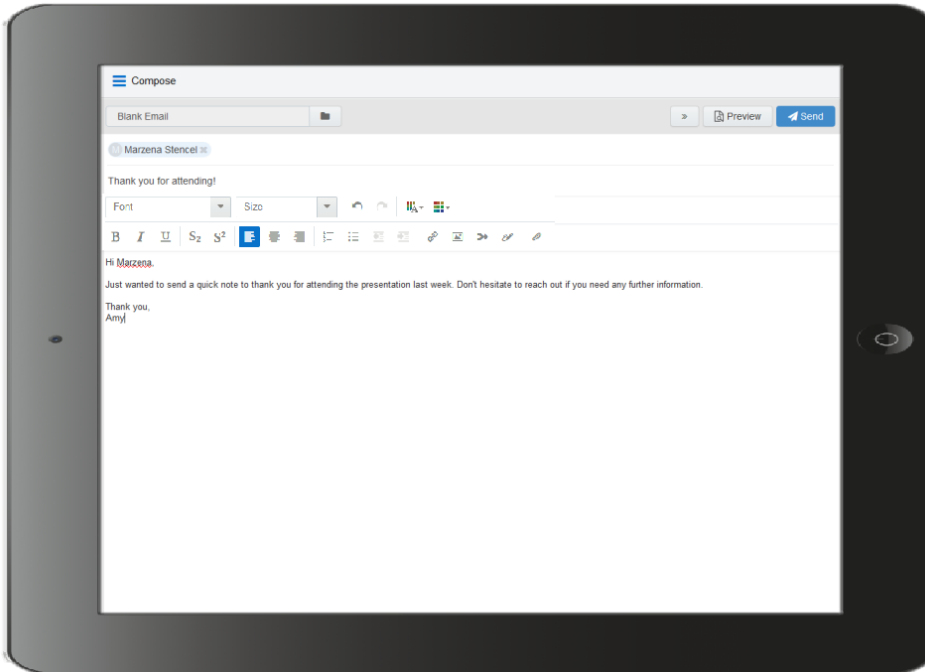
5 Using Engage

Use Engage to send personal email messages or email based on templates created in Oracle Eloqua. Customize your email by adding images, attachments, hyperlinks, and so on.

5.1 Sending personal email messages

You can create and send a new email message directly in Engage starting from a blank canvas.

You can only see the option to create a blank email if your Engage account is configured with the **Allow use of blank templates** setting. For more information, see Reconfiguring Engage.

> ⓘ **Important**: Default headers and footers configured for email groups are not included with email you create using a blank template in Engage. To include an email group's headers and footers, send email using a template created in Oracle Eloqua.

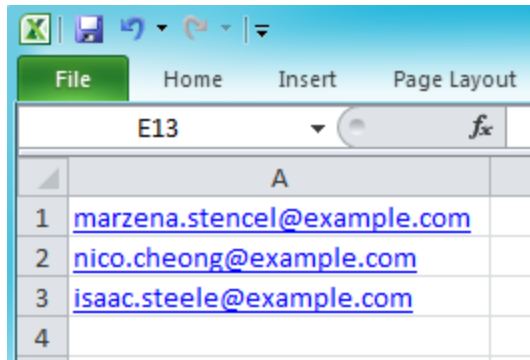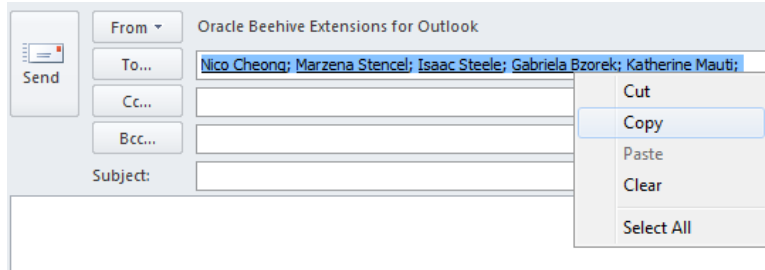## To send a personal email using Engage:

1. Open Engage.

2. Click **Compose**.

3. Select **Blank Email**, then click **Choose**. If you created a signature, it will automatically appear on the blank canvas.

4. Create your email. Use the rich text options (bold, italic, underline, numbering, bullets, indentation, as well as font style, size, and color) to customize your content. You can also insert hyperlinks, images, attachments, signatures, and field merges.

5.

   Enter the email recipients in the *To* line.

   - You can manually enter your recipients' email addresses or copy and paste contacts from Microsoft Outlook, as well as XLS and CSV files.
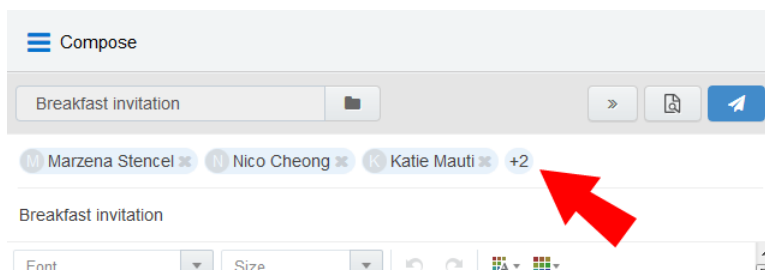
- As you enter an email recipient's name or email address, Engage searches your Oracle Eloqua contacts (if this permissions is enabled in Engage Global Settings). If you enter an existing Oracle Eloqua contact, the name is displayed in blue. New email addresses, that do not match Oracle Eloqua contacts, or ones missing a field merge value, display in orange. You are prompted to save these recipients as contacts before sending the email.

> ℹ️ **Important**: Field merges can cause incorrect values in email sent from Engage if the corresponding contact fields for individual contacts are blank.

Engage displays warning messages if contacts are globally unsubscribed or if the email addresses are flagged as bouncebacks. These contacts are displayed in red. After clicking **Send**, Engage provides a list of any recipients who will not receive the email because they are either on the master exclude list or unsubscribed from the email group.

> 💡 **Note**: In order for you to add new contacts, the **Manage Contacts** setting must be enabled for your user profile in Eloqua. This setting can be modified by your administrator in *Setup > Users > Groups > Action Permissions > Contacts*. Learn more about managing email groups.

- Recipient email addresses are displayed in a single row. This allows for more space to edit your email when working on a smaller screen. You can expand to view all email addresses at any time.


- Recipients are not modified if you select a different template.

6. Enter the email subject.

7. Preview your email.

8. (Optional) Save your email:

   a. Click the [»] icon and select **Save As** or **Save**. *Save As* is available for users with asset creation permissions. *Save* is available for users who have edit permissions to the existing email.

   > 👆 **Tip**: You can also delete duplicate or unnecessary email templates by selecting **Delete**. You must have appropriate asset permissions to delete email templates.

   b. Modify the *Name*, *Subject*, and *Email Group* lines as needed. Select **Share with other users** if you want other users to have access to this email.

Save Email As				✕
	* Name	Copy of Breakfastinvitation		
	* Subject	Breakfast invitation		
	* Email Group	Events	▾	
	Share with other users	☐		

Cancel   Save

c. Click **Save**. The email is saved in the email chooser in the root folder under a user-specific folder: engage-personal-folder-{*userId*}-{*username*}.

> ⓘ **Important**: For users to share saved emails with other users, administrators must enable the *Allow creation of public Engage emails* option in *Engage Global Settings* (**Settings** ⚙ > **Apps**, under the *Platform Extensions* section). Learn more about Reconfiguring Engage.

9. Click **Send**.

  - If you entered any email addresses for new contacts that do not already exist in Oracle Eloqua, the *Create Contact* popup appears. You need to complete all required contact fields (marked with an asterisk).

    > ⓘ **Important**: Field merges can cause incorrect values in email sent from Engage if the corresponding contact fields for individual contacts are blank or contain default values such as `First Name`. Best practice is to populate all fields for which you have accurate information.
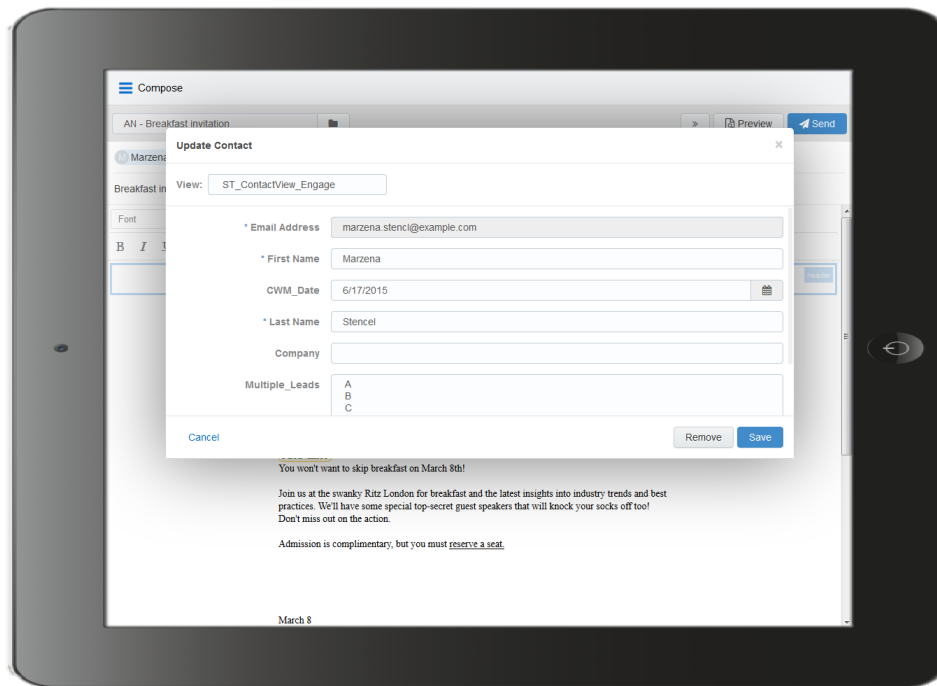
    Contact fields vary depending on your security group settings in Oracle Eloqua and the views your administrator has given you access to. Select the desired view from the *View* list.

  - If your email contains field merges, the fields also appear on the *Create Contact* popup for you to complete for each contact. For existing contacts, you can update the values of field merges if they

are blank or the default values, to make them more meaningful and personal to your prospect. Any changes you make in the popup for blank values will permanently update the contact records.

> ℹ️ **Important**: If a contact record contains field values that contain a default value, such as `First Name`, the *Create Contact* popup is *not* displayed. Field merges from such contacts can cause incorrect values in email sent from Engage. Best practice is to populate all fields for which you have accurate information and not allow default values for commonly merged fields.

- You must either **Save** each contact or **Remove** them from the email recipient list.

Once the email is sent, Engage displays your *Recent Emails Sent* history and send status.

> 💡 **Note**: You cannot schedule the sending of email from Engage.

5.2 Sending emails created in Oracle Eloqua

You can create and send a new email directly in Engage by using an existing email created in Oracle Eloqua as a template. Learn about making email templates available in Engage.
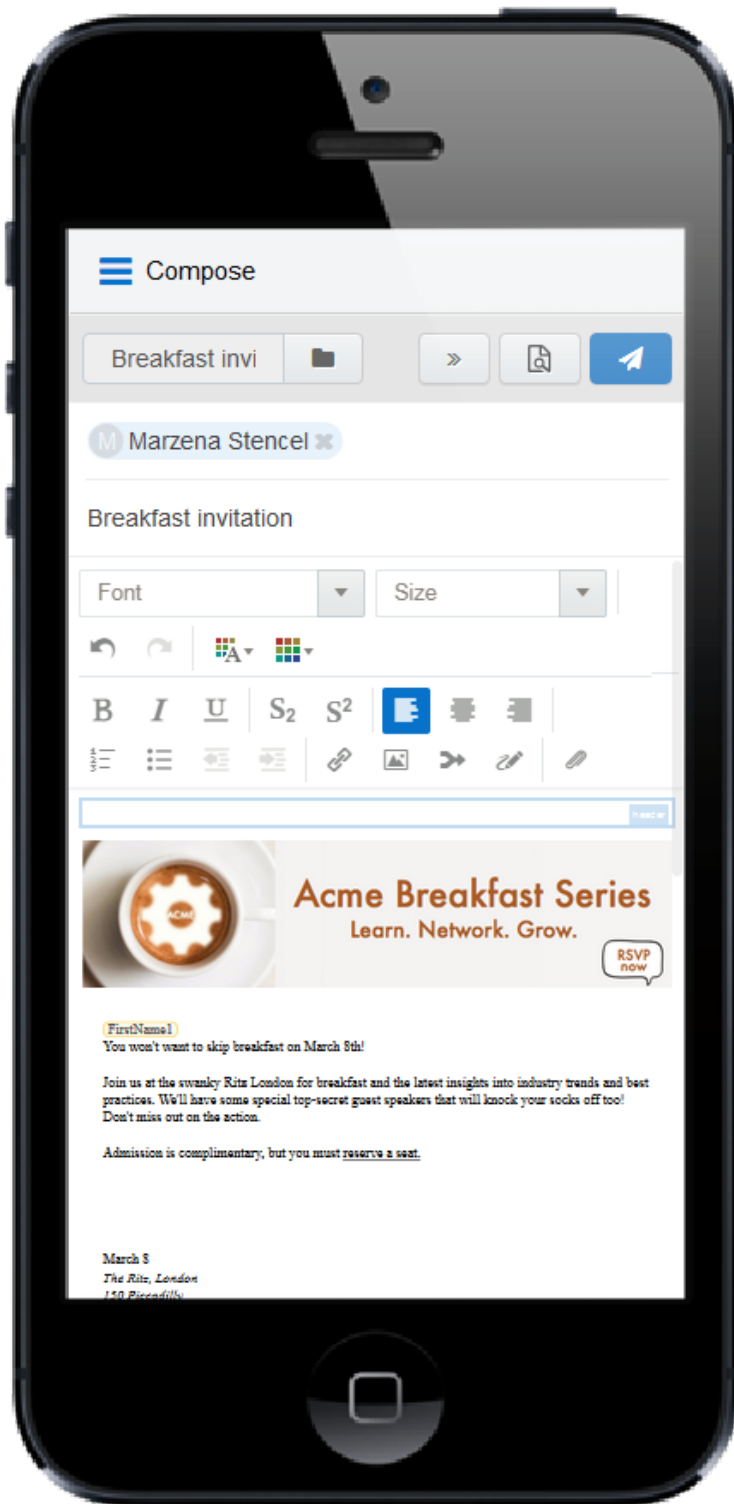
To send an email created in Oracle Eloqua:

1. Open Engage.

2. Click **Compose**. The *Select a Template* page is displayed.

3. Select an existing email created in Oracle Eloqua. The available Oracle Eloqua emails are displayed. Each email has a thumbnail image, file name, email subject, and date last modified. Twenty emails are displayed by default. Click **Load More** to view additional emails. You can also search for the desired Oracle Eloqua email.

4. Use the following tabs to sort your emails to quickly find the one you are looking for:
   - *Recent*: Displays any emails you recently viewed. This is the default tab. The first template is *Blank Email*, if this permission has been enabled in Engage Global Settings. Select this to create your own personal email in Engage without using a template.

   > ⓘ **Important**: Default headers and footers configured for email groups are not included with email you create using a blank template in Engage.

   - *My*: Displays emails created by you. By default, the newest templates are listed first. Click the refine icon ⚏ to sort alphabetically and to filter by an email group.

   - *All*: Displays all available emails. By default, the newest templates are listed first. Click the refine

icon ![icon] to sort alphabetically and to filter by an email group.
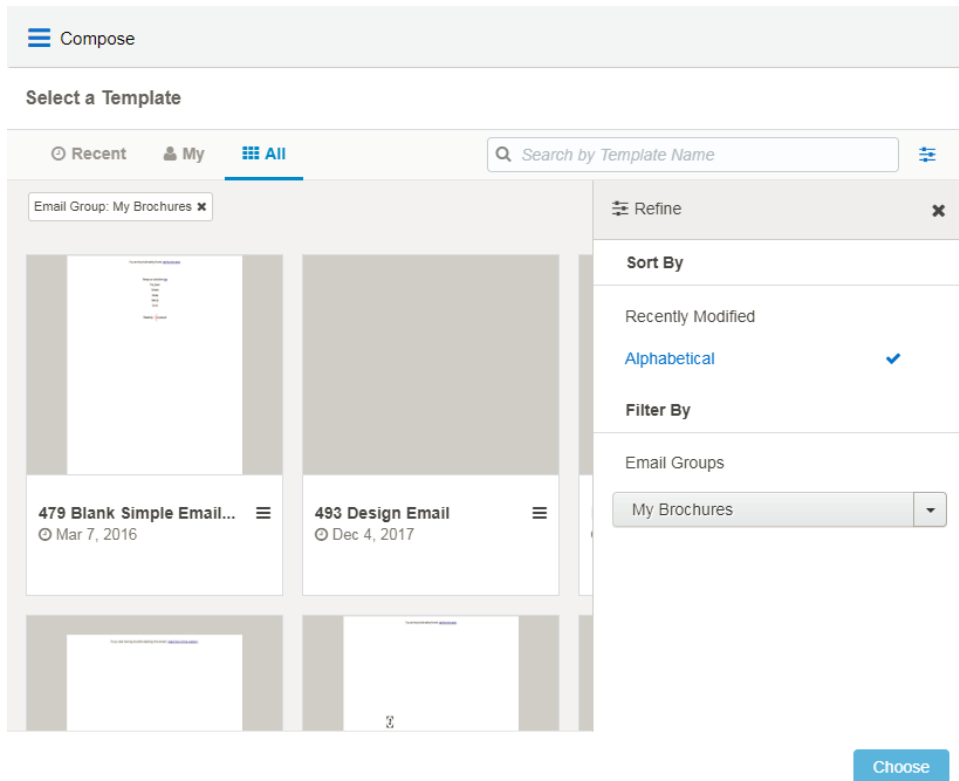
Delete duplicate or unnecessary email templates by clicking the ≡ icon and selecting **Delete**.
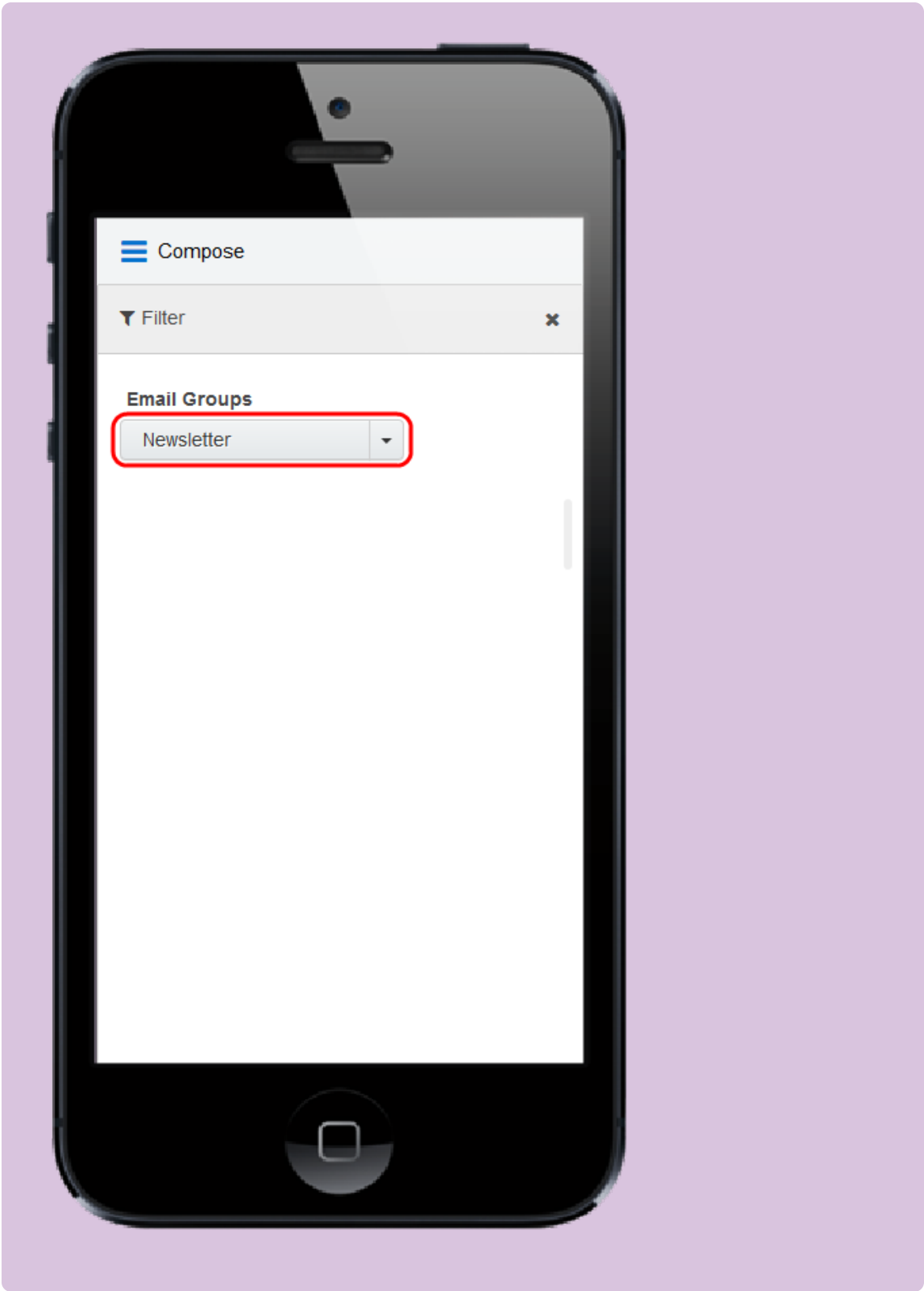
You must have appropriate asset permissions to delete email templates.

👍 **Tip**: You can filter emails in *My* and *All* tabs based on an email group and sort them. Click the refine icon ![icon] to select the desired email group or sort templates alphabetically or by most recent. You can combine the email group filter and search to narrow down your list of emails. To clear the filter, select **All** in the email group drop-down or remove the email group label. Learn more about managing email groups.

Emails must have appropriate permissions set to be available in Engage. Learn how to make emails available in Engage.
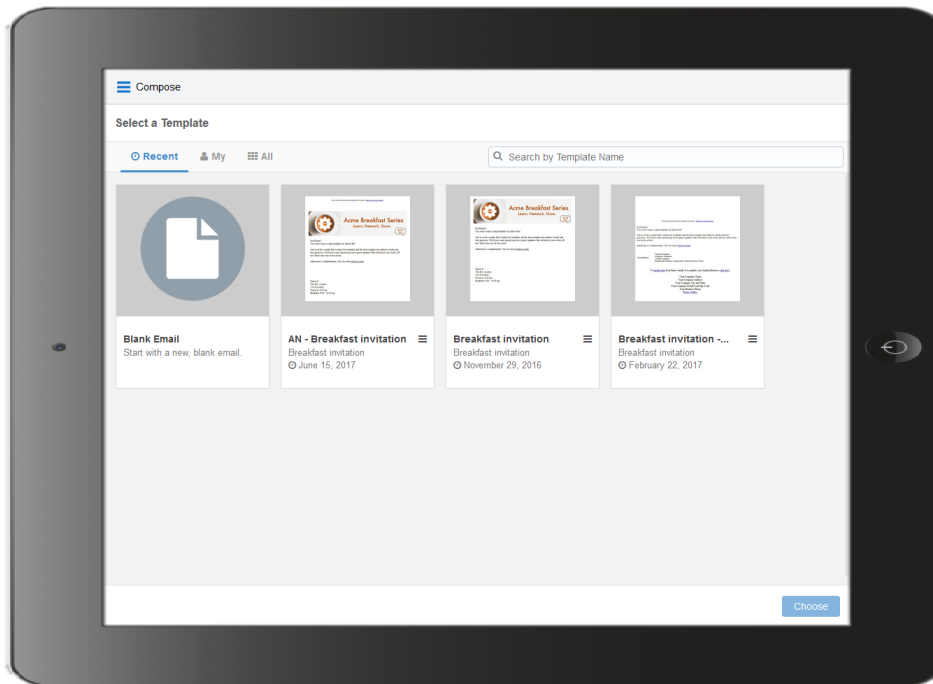

5. Select the email you want to use and click the **Select** button, or double-click the email. You can go back and select a different email by clicking the folder icon again. Selecting a different email overrides any change you have made.

6. Edit your email content. Where permitted, you can edit email content by using the rich text options (bold, italic, underline, numbering, bullets, indentation, as well as font style, size, and color). You can also modify or insert hyperlinks, images, attachments, signatures, and field merges.

   - Editing differs between responsive and non-responsive emails. Responsive emails dynamically scale depending on the size of the screen they are viewed on. They are ideal for tablets and mobile viewing. Non-responsive emails scale in smaller screens.
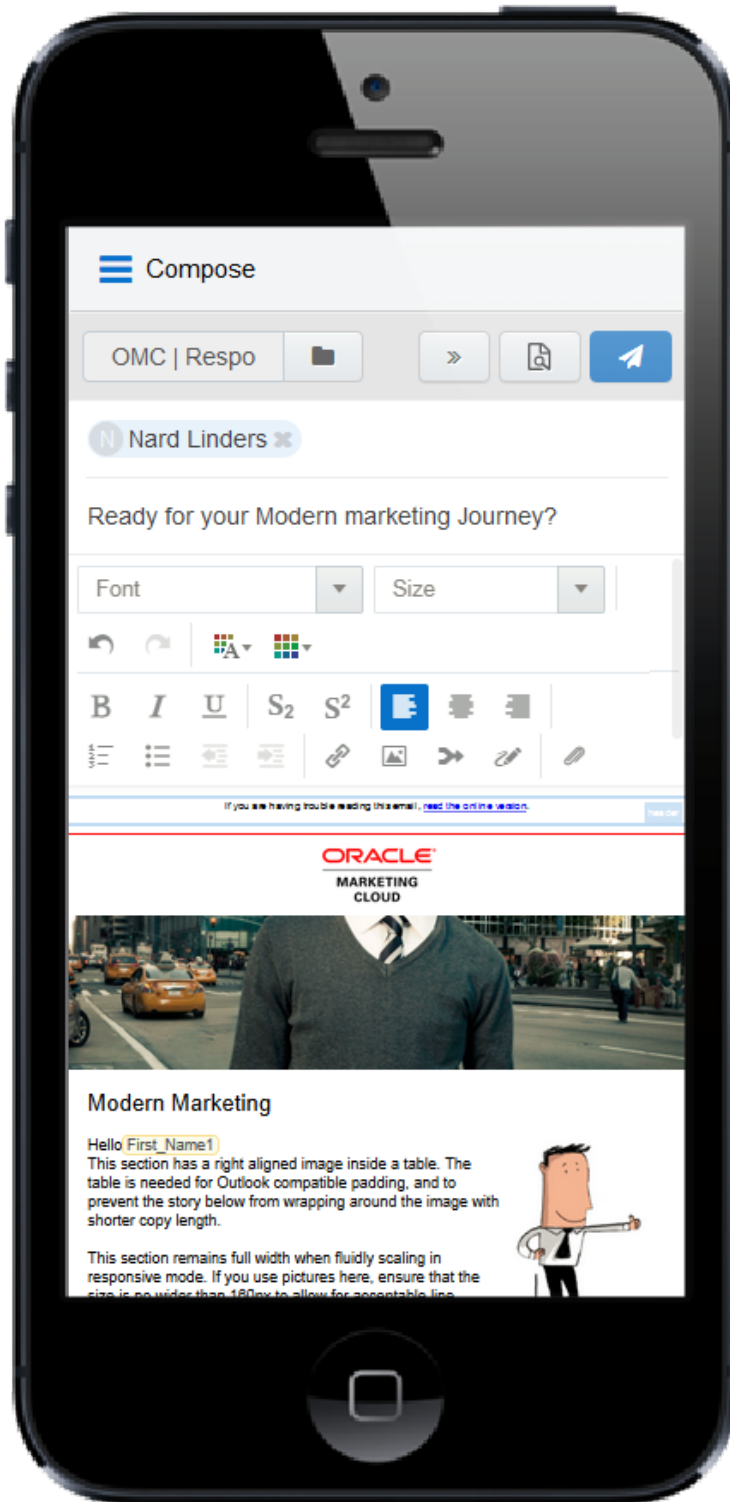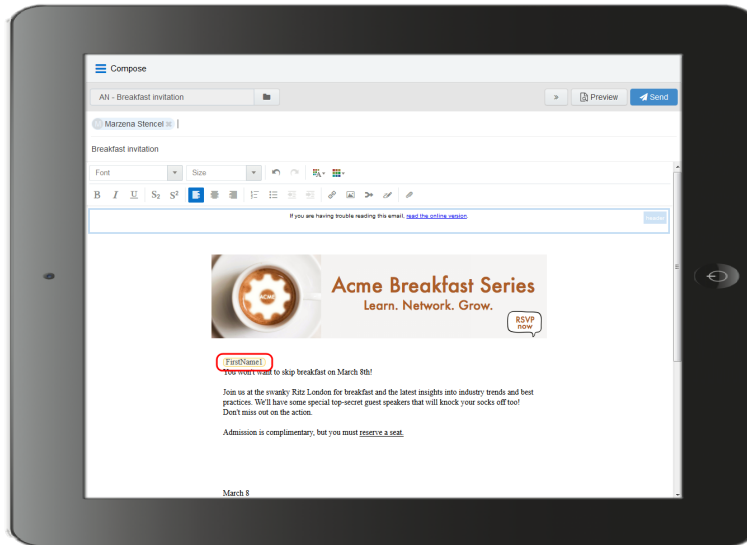
- Content you can change is outlined in green and marked with an edit icon. Content you cannot change is locked. Locked content is outlined in gray, is marked with a lock icon, and is locked

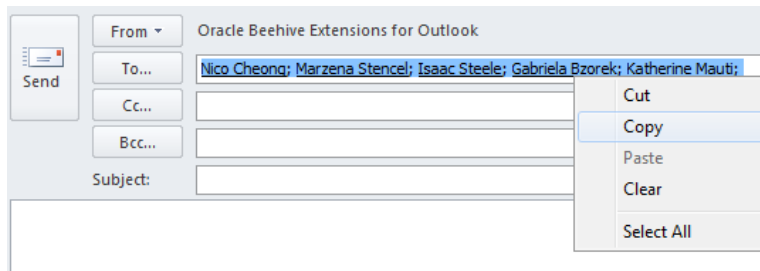based on the configuration of email groups, email templates, and Engage settings.
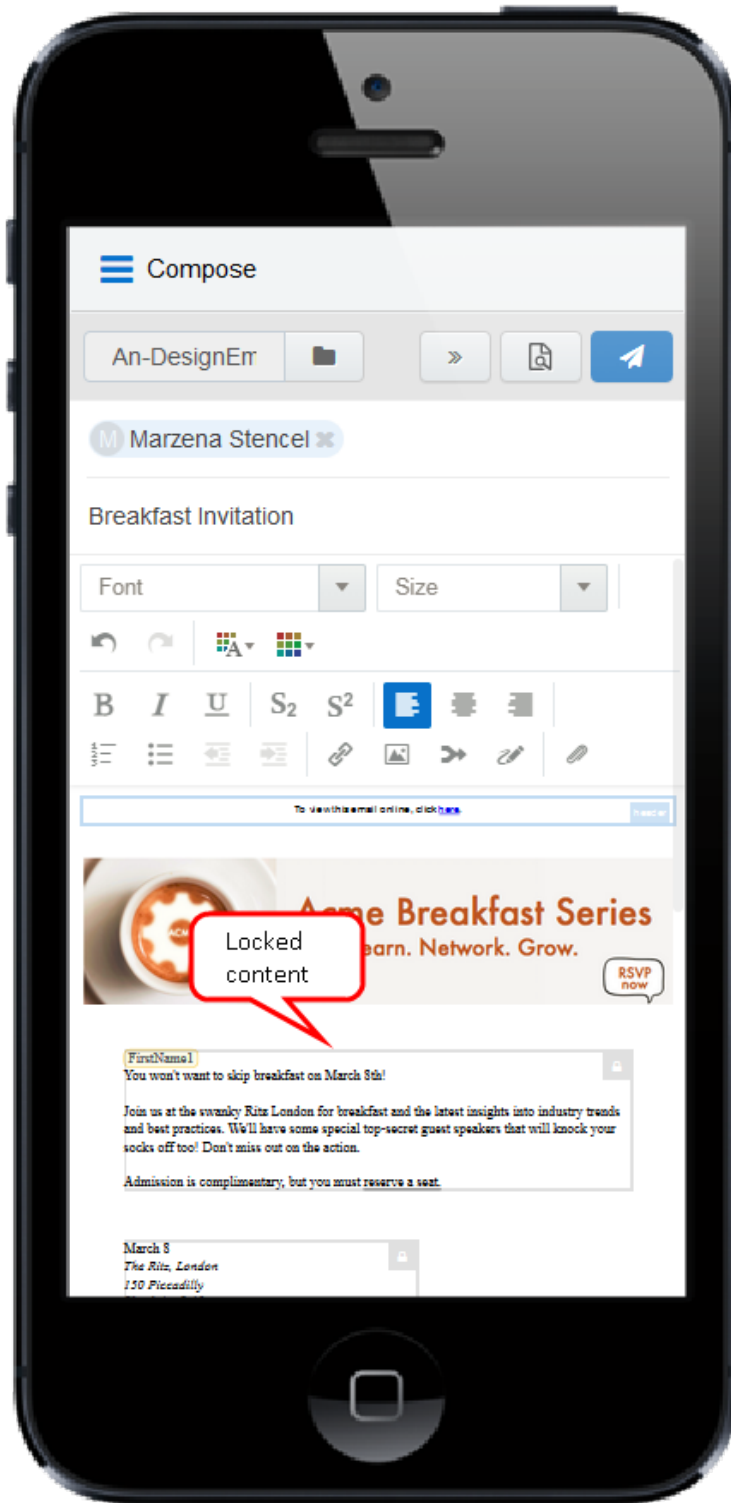
- Field merges can be easily identified. They are highlighted in yellow throughout your email, including the *Subject* line. If needed, you can delete merged fields from the *Subject* line. If field merges in the body of the email template are protected, you cannot edit them. The values of these fields are displayed when you preview your email.

7. Enter the email recipients in the *To* line.

- You can manually enter your recipients' email addresses or copy and paste contacts from Microsoft Outlook, as well as XLS and CSV files.
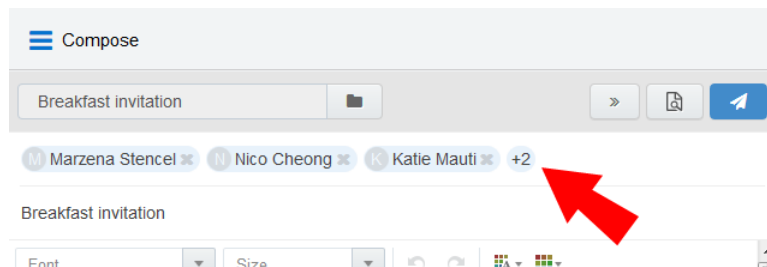
- As you enter an email recipient's name or email address, Engage searches your Oracle Eloqua contacts (if this permissions is enabled in Engage Global Settings). If you enter an existing Oracle Eloqua contact, the name is displayed in blue. New email addresses, that do not match Oracle Eloqua contacts, or ones missing a field merge value, display in orange. You are prompted to save these recipients as contacts before sending the email.

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> 🔑 **Note**: In order for you to add new contacts, the **Manage Contacts** setting must be enabled for your user profile in Eloqua. This setting can be modified by your administrator in *Setup > Users > Groups > Action Permissions > Contacts*. Learn more about managing email groups.

- Recipient email addresses are displayed in a single row. This allows for more space to edit your email when working on a smaller screen. You can expand to view all email addresses at any time.


- Recipients are not modified if you select a different template.

8. Modify the email subject.

- The email Subject line is pre-populated based on the template you selected. It can be modified.

- Merged fields or dynamic content pre-populated in the *Subject* line cannot be modified but can be deleted.

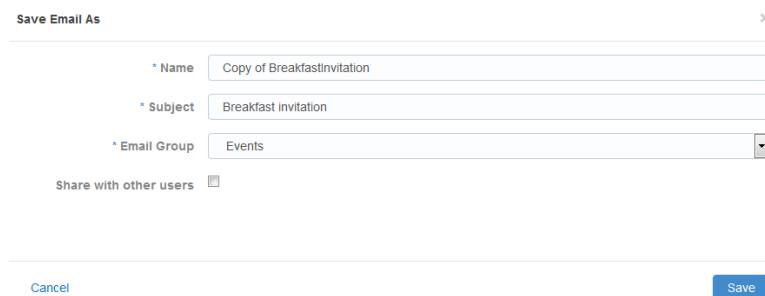- The email subject is replaced if you select a different template.

9. Preview your email.

10. (Optional) Save your email:

a. Click the [»] icon and select **Save As** or **Save**. *Save As* is available for users with asset creation permissions. *Save* is available for users who have edit permissions to the existing email.

> 👍 **Tip**: You can also delete duplicate or unnecessary email templates by selecting **Delete**. You must have appropriate asset permissions to delete email templates.

b. Modify the *Name*, *Subject*, and *Email Group* lines as needed. Select **Share with other users** if you want other users to have access to this email.

Save Email As		✕
* Name	Copy of BreakfastInvitation	
* Subject	Breakfast invitation	
* Email Group	Events	▾
Share with other users	☐	
Cancel		Save

c. Click **Save**. The email is saved in the email chooser in the root folder under a user-specific folder: engage-personal-folder-{*userId*}-{*username*}.

> **ⓘ Important**: For users to share saved emails with other users, administrators must enable the *Allow creation of public Engage emails* option in *Engage Global Settings* (**Settings** ⚙ > **Apps**, under the *Platform Extensions* section). Learn more about Reconfiguring Engage.

11. Click **Send**.

    - If you entered any email addresses for new contacts that do not already exist in Oracle Eloqua, the *Create Contact* popup appears. You need to complete all required contact fields (marked with an asterisk).

      > **ⓘ Important**: Field merges can cause incorrect values in email sent from Engage if the corresponding contact fields for individual contacts are blank or contain default values such as `First Name`. Best practice is to populate all fields for which you have accurate information.

      Contact fields vary depending on your security group settings in Oracle Eloqua and the views your administrator has given you access to. Select the desired view from the *View* list.

    - If your email contains field merges, the fields also appear on the *Create Contact* popup for you to complete for each contact. For existing contacts, you can update the values of field merges if they are blank or the default values, to make them more meaningful and personal to your prospect. Any changes you make in the popup for blank values will permanently update the contact records.

      > **ⓘ Important**: If a contact record contains field values that contain a default value, such as `First Name`, the *Create Contact* popup is *not* displayed. Field merges from such contacts can cause incorrect values in email sent from Engage. Best practice is to populate all fields for which you have accurate information and not allow default values for commonly merged fields.

- You must either **Save** each contact or **Remove** them from the email recipient list.

Once the email is sent, Engage displays your *Recent Emails Sent* history and send status.

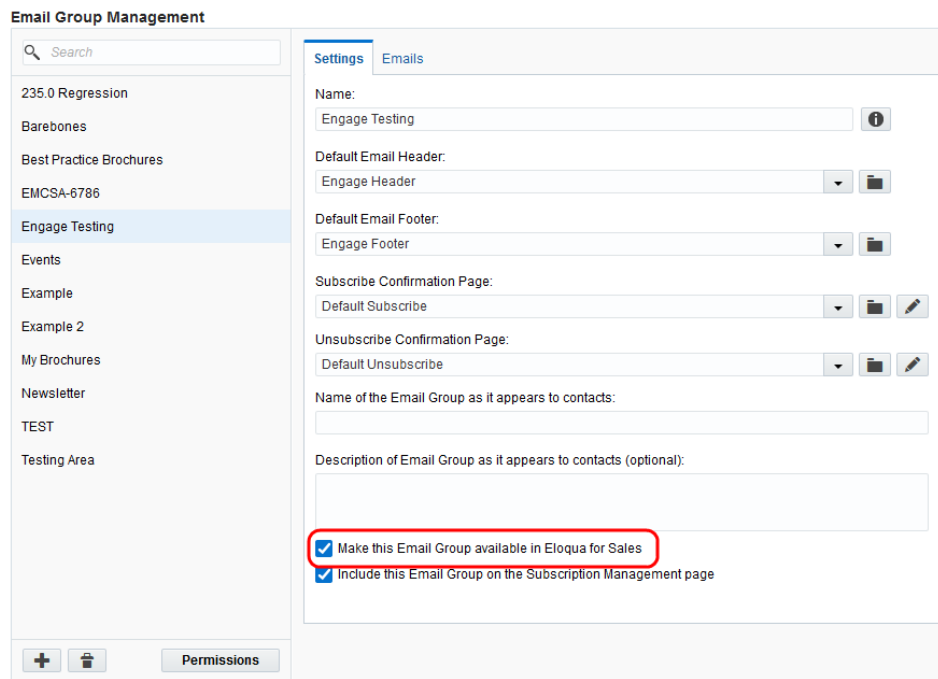> 💡 **Note**: You cannot schedule the sending of email from Engage.

5.3 Making a template available in Engage

You can create email templates that sales users can access in Engage.

To make a template available in Engage:

1. Create and configure your email group and make it available to Engage.

    a. Navigate to **Assets** ✎ > **Email Setup** > **Email Groups**.

    b. Select an existing email group or create an new one.

    c. Select the **Make this Email Group available in Eloqua for Sales** check box.

    d. Click **Permissions** and review and customize the email group permissions. You want to ensure that your sales users have access to the email group. Also ensure that your security group has access.

    e. Save your changes.

2. Add your email template to the email group associated with Engage.

    a. Navigate to **Assets** 🖊 > **Emails**.

    b. Select an existing email or create a new one.

> 👍 **Tip**: You can create an Engage protected email template for your sales users by creating your email from a protected marketing email template.

    c. Ensure that you assign the email to the email group that you enabled for sales above.

3. Review and customize the email permissions.

    a. Click **Actions**, then select **Permissions**.

    b. Ensure that your sales users have access to the email. The template will be available to sales users if they have the View permission.

User/Group	View	Edit	Delete	Set Security
Active Users - Sales	☑	☐	☐	☐
Advanced Users - Marketing	☑	☑	☑	☐
Amy Ngo	☑	☑	☑	☑
Basic Users - Marketing	☑	☐	☐	☐
Customer Administrator	☑	☑	☑	☑
Engage Users	☑	☑	☐	☐

Asset Permissions

Specify users or security groups and what level of access they will have to this asset

➕ 🗑   Cancel   Save

5.4 Creating an email signature

As an Engage user, you can create a personalized email signature that is automatically inserted into your blank emails. If you select a template, the email signature is overwritten.

To create an email signature in Engage:

1. Click **Settings** .

2. Select **Include signature in blank emails**.

3. Create your signature. Personalize it by using rich text options (bold, italic, underline, numbering, bullets, indentation, as well as font style, size, and color).
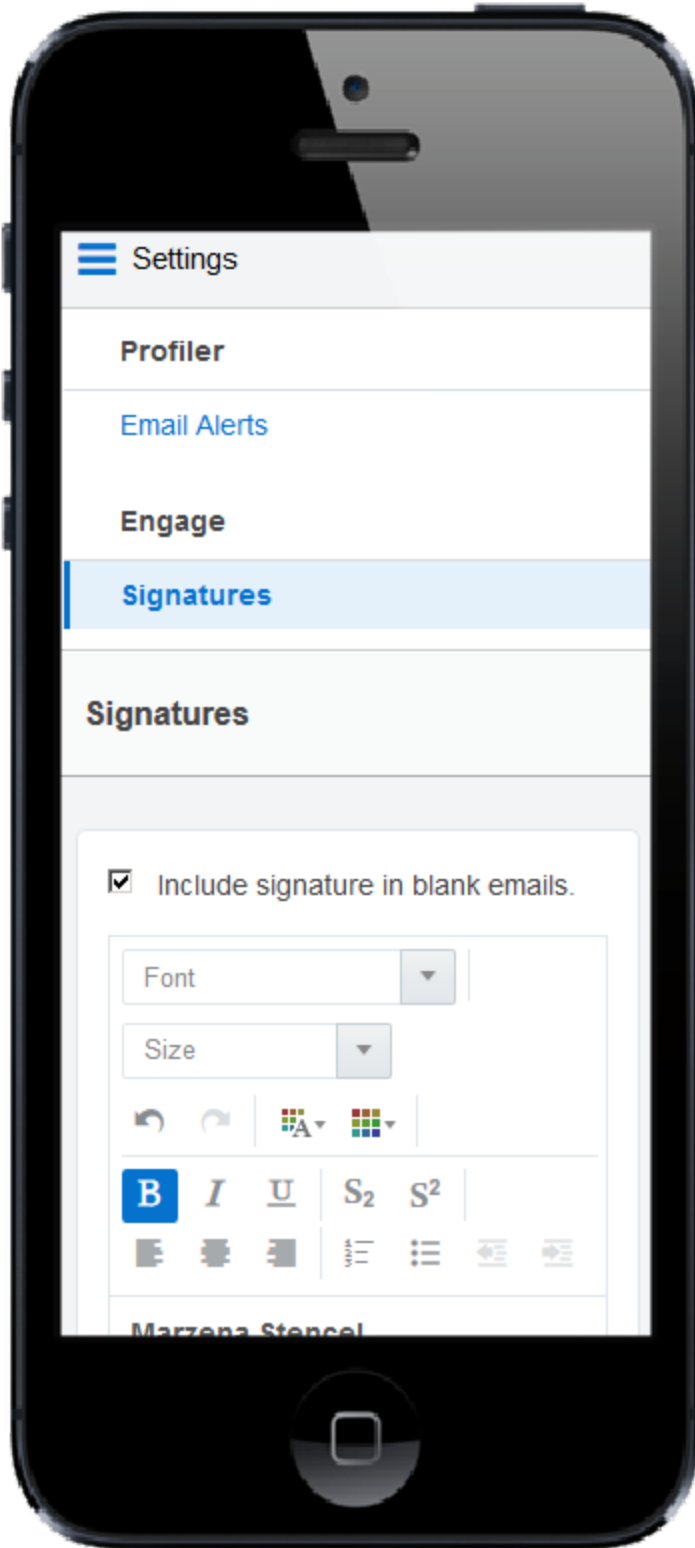
4. Click **Save Settings**.

The email signature is created. The next time you create a personal email, the signature will be added automatically.

5.5 Adding hyperlinks to Engage emails

You can insert hyperlinks in your Engage emails. A hyperlink can route your clients to a landing page, a file, a web page, a system action, or a pre-addressed email that they can fill out and send. You can also modify existing hyperlinks in your emails, as long as the content is not locked.

Hyperlinks in your Engage emails are automatically tracked. Clicking the hyperlink during preview or while viewing the sent history will not add to your tracking data. Learn more about link tracking.

To add a hyperlink to an email:

1. Create a new Engage email or open an Eloqua email template.

2. Select the text that you want to use as a hyperlink, then click **Hyperlink** in the toolbar. If you do not select text, the hyperlink will be inserted where your cursor is placed.

3. Enter the URL you want to route your recipients to. You can also modify the text you want the recipient to see.

Edit Hyperlink   ✕

Text   Oracle

URL   http://www.oracle.com

Cancel   Remove   OK

4. Click **OK** to save your changes. The *OK* button is enabled once text is entered in the URL field.

You can edit the text or URL of your hyperlink at any time by clicking it. Selecting **Remove** only deletes the URL; the text remains in your email. If you select multiple hyperlinks in your email and click **Hyperlink** 🔗 , only the first hyperlink will be modified.

5.6 Adding images to Engage emails

You can insert images from your Oracle Eloqua image library or your device into your Engage emails. You can also add hyperlinks to new and existing images.

Images uploaded from your device are saved in the root folder in Oracle Eloqua's image library under a user-specific Engage folder: engage-personal-folder-{userId}-{username}.

Prerequisites

- Administrators must enable the insertion of images in Engage emails in *Engage Global Settings* (**Settings** ⚙ > **Apps**, under the *Platform Extensions* section). Learn more about configuring Engage Global Settings.

- Images in Oracle Eloqua must have appropriate asset permissions in order to be available in Engage. Administrators can manage this setting using security groups by enabling image *view*

and *edit* asset permissions. Learn more about default asset permissions.

- Images must be appropriately sized before inserting into your message.

> ⓘ **Important**: Always preview your email before sending it to your recipients to ensure the layout and size of your images is as expected. You may need to resize your images in the email [[[Undefined variable ProductNames.ResponsiveEditor]]] before inserting them into your Engage email. Learn more about emails and working with email content and layouts.

To add an image to an email:

1. Create a new Engage email or open an Oracle Eloqua email template.

2. Place your cursor at the position in your email where you want the image to appear. It can be moved later if desired. Click the **Image** icon in the toolbar.
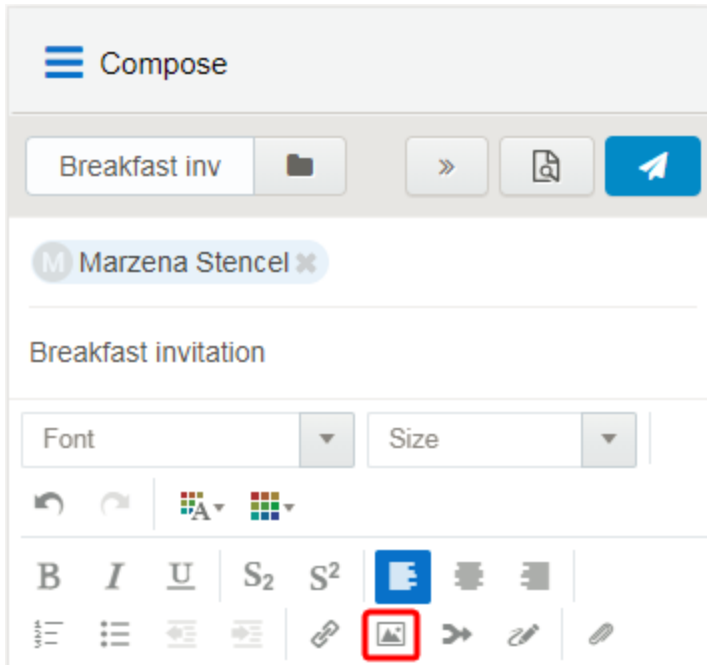
3. Select an image from the Oracle Eloqua image library or click **Upload** to browse your local device.

   For image uploads, the following file types are supported: GIF, JPG, JPEG, PNG, and SVG. The maximum file size is 5 MB. You have the option to rename the image.
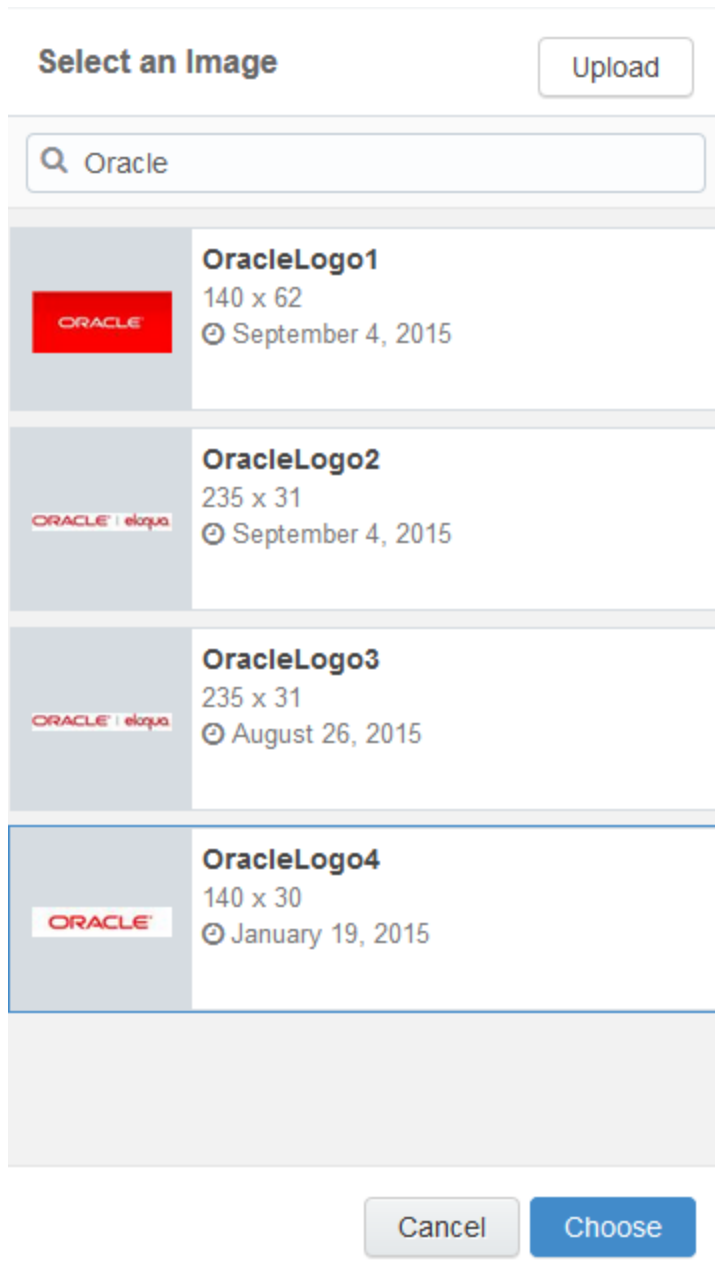
4. Click **Choose**. The image appears in your email.

5. (Optional) Add a hyperlink to your image.

    a. Click the image.

    b. Enter the URL.

Insert Hyperlink   ×

Text   <image>

URL   http://www.oracle.com

Cancel   Remove   OK

    c. Click **OK**. The *OK* button is only enabled once text is entered in the URL field.

5.7 Adding attachments to Engage emails

You can insert attachments from your Oracle Eloqua File Storage library or device into your Engage emails. This allows you to send relevant information such as white papers, event invitations, and so on, to your contacts to drive higher engagement.

Attachments can be uploaded to a user specific Engage folder: engage-personal-folder-{userId}–{username} located in the root folder of Oracle Eloqua's File Storage library (Assets –> Components –> File Storage).

Prerequisites:

- Administrators must enable the insertion of attachments in Engage emails in *Engage Global Settings* (**Settings** ⚙ > **Apps**, under the *Platform Extensions* section). Learn more about configuring Engage Global Settings.

- Files must have appropriate asset permissions in order to be available in Engage. Administrators can manage this setting using security groups by enabling image *view* and *edit* asset permissions. Learn more about default asset permissions.
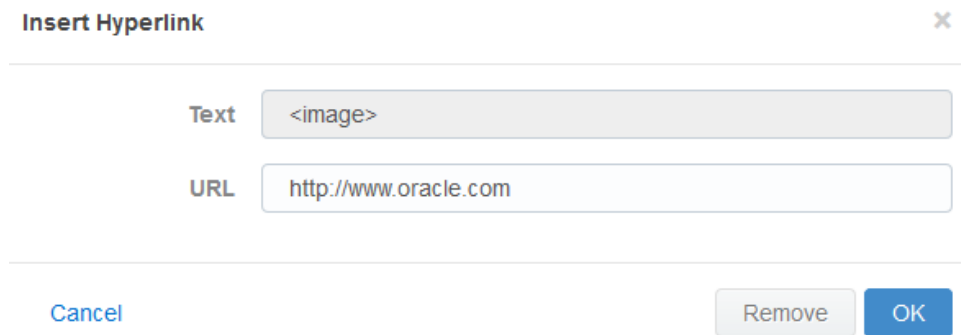
To add an attachment to an email:

1. Create a new Engage email or open an Oracle Eloqua email template.

2. Click the **Attachment** icon 📎 in the toolbar.
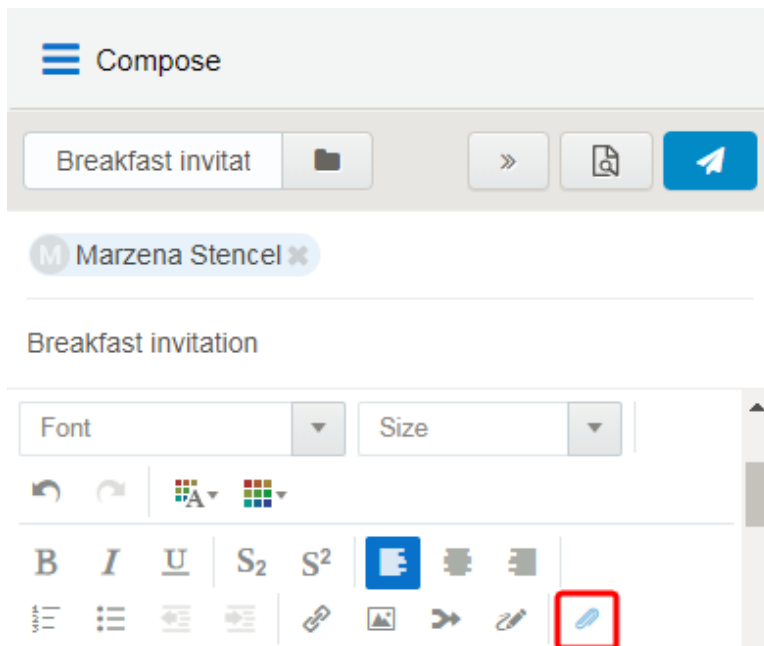
3. Select a file from the Eloqua File Storage library or click **Upload** to browse your files. You can insert the file as a *Tracked Link* or *Attached File*.
   - Use the *Tracked Link* option to add a tracked URL to the body of the email that points to the file hosted in Oracle Eloqua's File Storage Library. This allows clickthroughs to the file by the recipient of the email to be tracked in Oracle Eloqua.
   - Use the *Attached File* option to include the actual physical file in the email as a traditional attachment.

4. Click **Choose**. The attachment appears in your email.

5.8 Adding field merges to Engage emails

You can insert field merges into your Engage emails. Use field merges to personalize your emails, forms, and landing pages using information from contact records, events, custom objects, or query string values. For example, use a field merge to add a contact's name to an email, pre-populate form fields with information you already have, or pass actionable data via hidden form fields to route contacts to appropriate sales representatives. Field merges are created and stored in your Oracle Eloqua component library. Field merges may also be included in Eloqua email templates, such as signatures that will be populated with the sender's contact information.
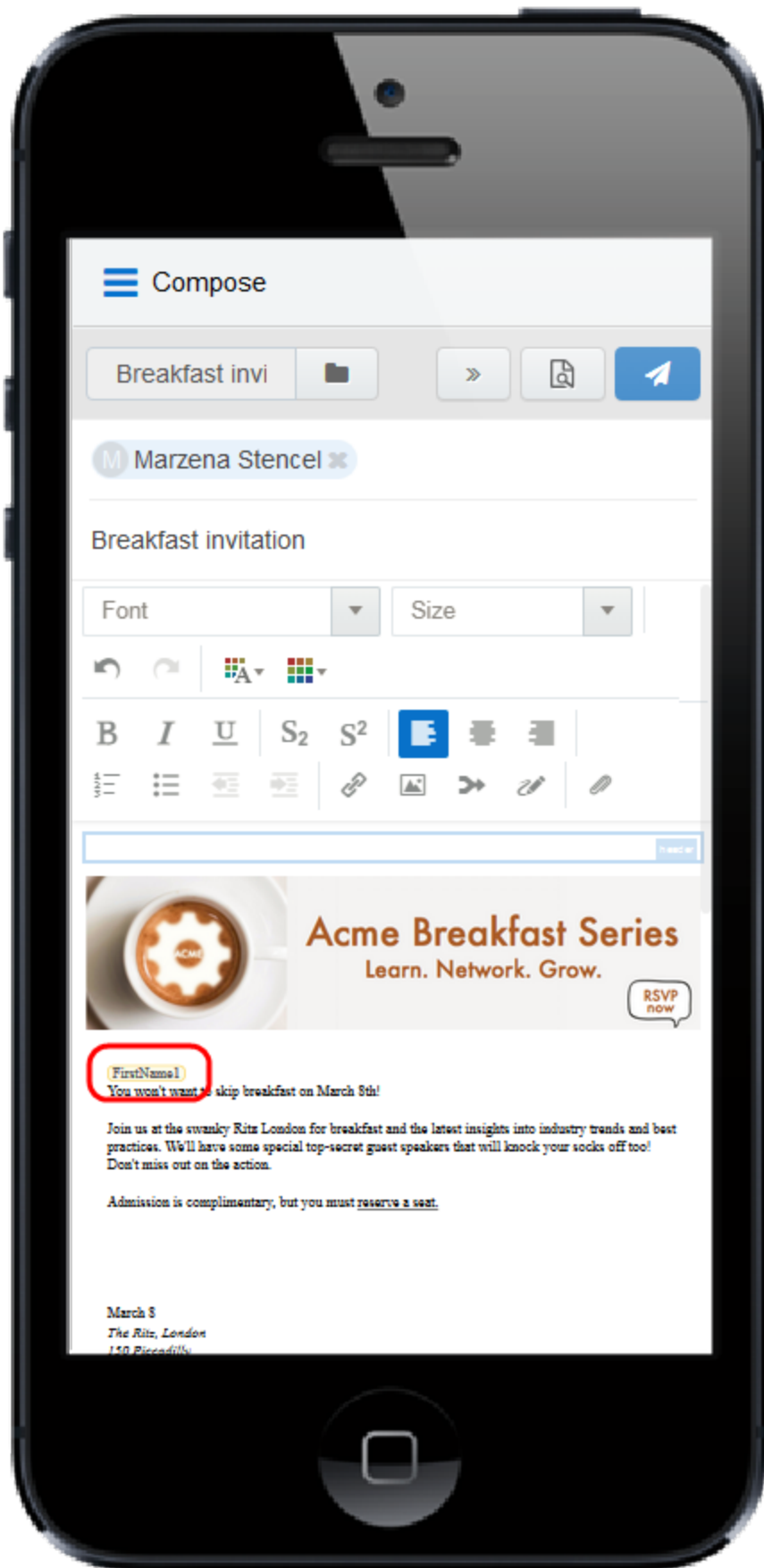
To add a field merge to an email:

1. Create a new Engage email or open an Oracle Eloqua email template.

2. Click the **Field Merge** icon ➤ in the toolbar.
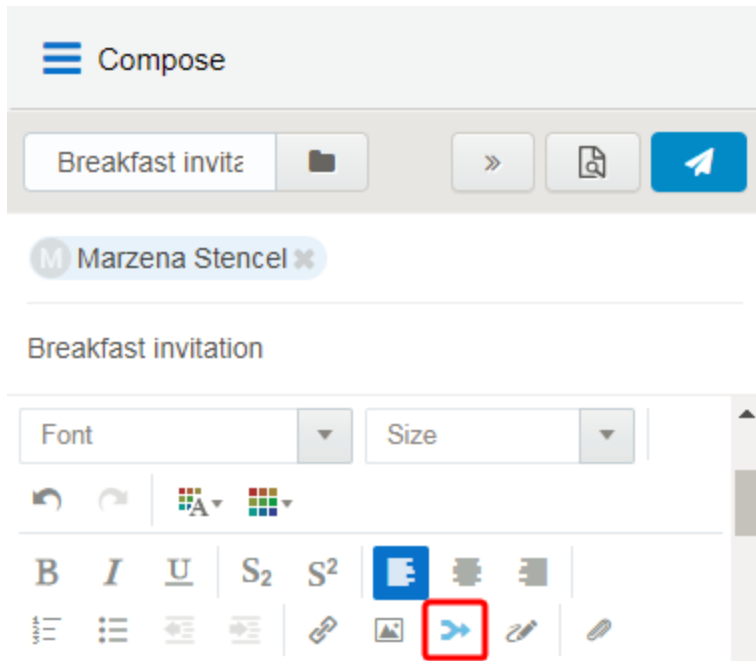
3. Select a field merge. You can search by the field merge name to quickly find the field merge you are looking for.

Select a Field Merge

Q Search by Field Merge Name

State
Modified:Friday, October 21, 2016, 10:44:45 AM

Zip
Modified:Friday, October 21, 2016, 10:43:34 AM

Address2
Modified:Friday, October 21, 2016, 10:42:38 AM

Address1
Modified:Friday, October 21, 2016, 10:42:22 AM

Cancel | Choose

4. Click **Choose**. The field merge is inserted at your cursor's location.

5. Click **Preview** to see how the fields will look when populated.

ℹ **Important**: If a contact record contains field values that contain a default value, such as `First Name`, the *Create Contact* popup will *not* be displayed when a user sends messages containing field merges. Field merges from such contacts can cause incorrect values in email sent from Engage. Best practice is to populate all

fields for which you have accurate information and not allow default values for commonly merged fields.

5.9 Adding signatures to Engage emails

You can insert signatures into your Engage emails. Signatures are created and stored in your Oracle Eloqua component library in the *Signature Layouts* area. They can contain images, field merges, and hyperlinks. Learn more about signature layouts.

> 💡 **Note**: Email templates can include a signature with field merges and dynamic content that is not editable. You can see how the signature will look when you preview the message.

Prerequisites:

- Signature layouts in Oracle Eloqua must have appropriate asset permissions in order to be available in Engage. Administrators can manage this setting using security groups by enabling image *view* or *edit* asset permissions. Learn more about default asset permissions.
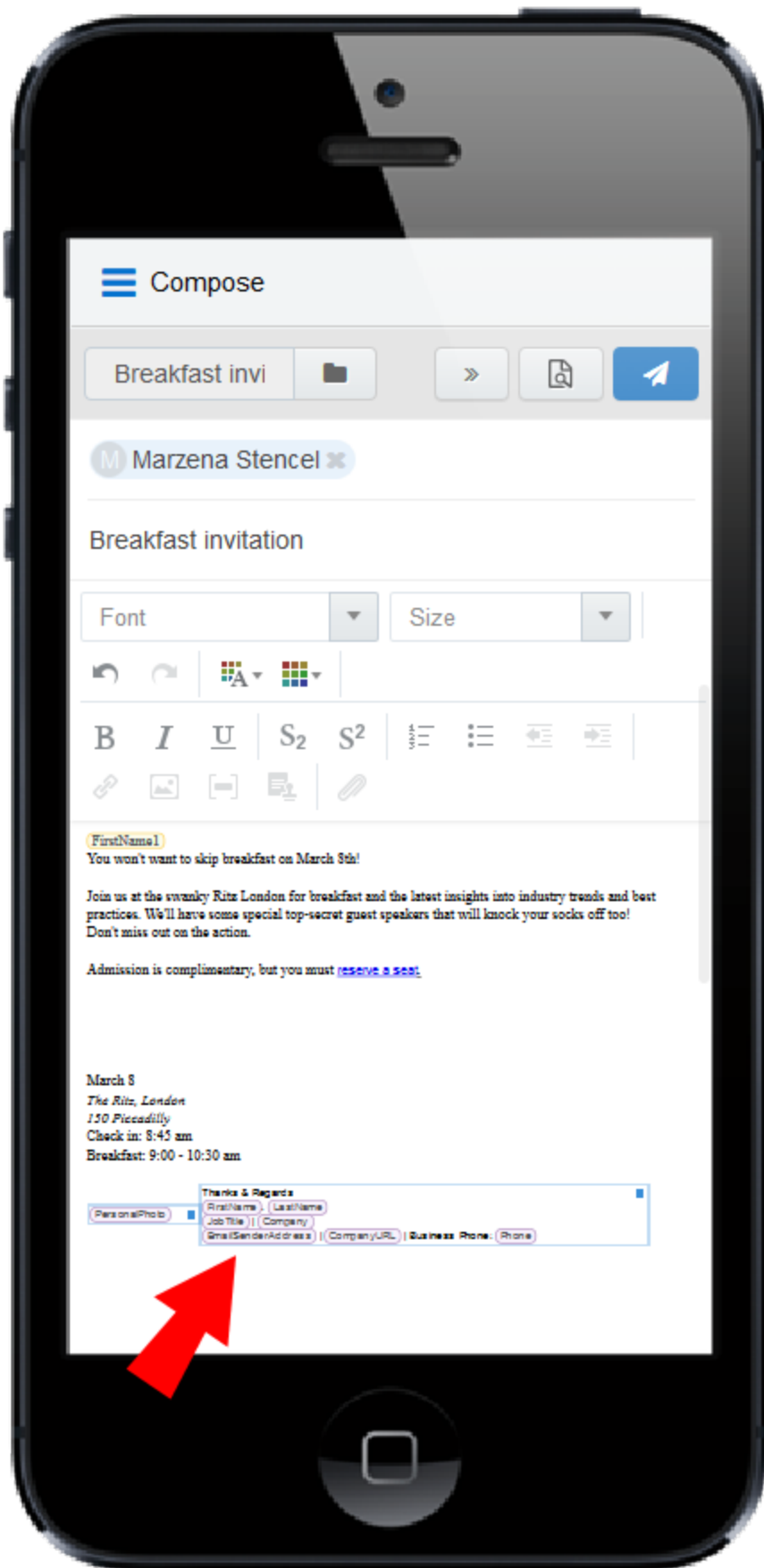
To add a signature to an email:

1. Create a new Engage email or open an Oracle Eloqua email template.

2. Place your cursor at the position in your email where you want the signature to appear. It can be moved later if desired. Click the **Signature** icon ▦ in the toolbar.
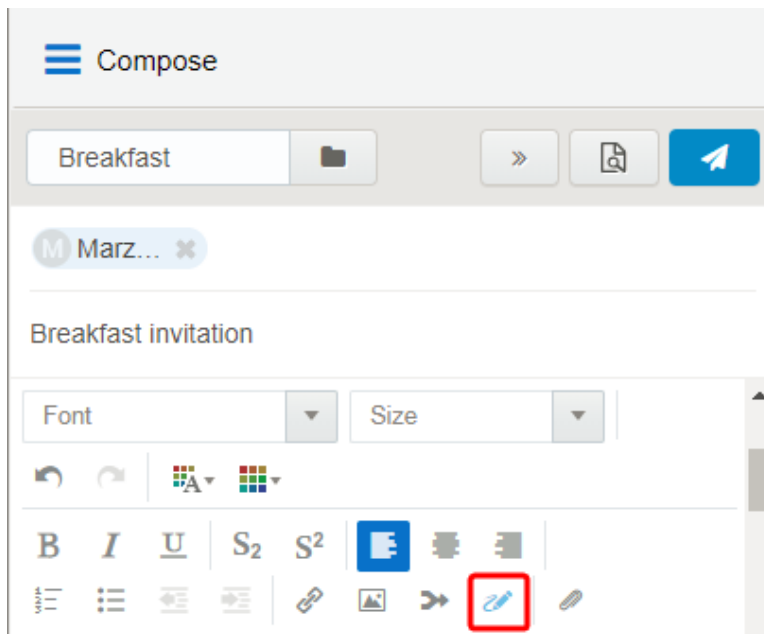
3. Select a signature. You can search by the signature name to quickly find the one you are looking for.
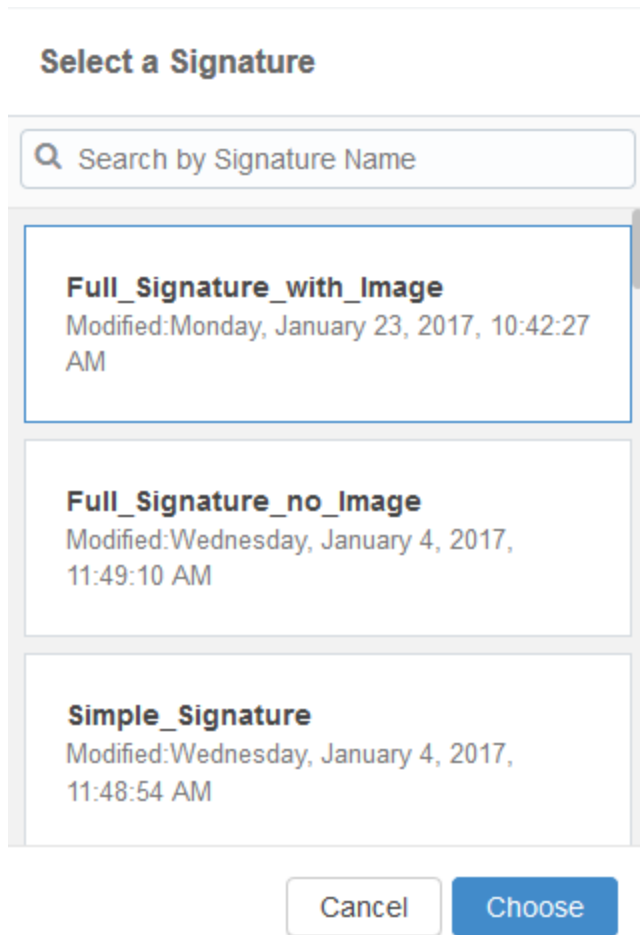
4. Click **Choose**. The signature is inserted at your cursor's location.

5.10 Previewing Engage emails

The preview feature allows you to validate the email content prior to sending, which saves time and helps maintain accurate reports compared to sending test emails to yourself or colleagues. The preview displays the email that will be sent to the first recipient and populates any necessary field merges (subject, body, signature), dynamic content, cloud content, and so on. You can then click on any other recipient to preview the message that will be sent to them and then return to editing if needed.

To preview an Engage email:

1. Create a new personal Engage email, or use an Eloqua email as a template.

2. Edit the content as desired and permitted. Some email templates contain field merges, dynamic fields, and other content that you cannot edit because it is protected. If the subject line is populated with field merges and dynamic content, you cannot edit it but you can delete it and enter a new subject line.

3. Enter the recipients and subject.

   > 💡 **Note**: The **Preview** button is enabled once the *To* and *Subject* fields are populated.

4. Click **Preview**. The preview displays the email that will be sent to the *first recipient*, populating the field merges, dynamic fields, cloud content, and so on. You can then click the names of additional recipients to preview how the message will be displayed to them.
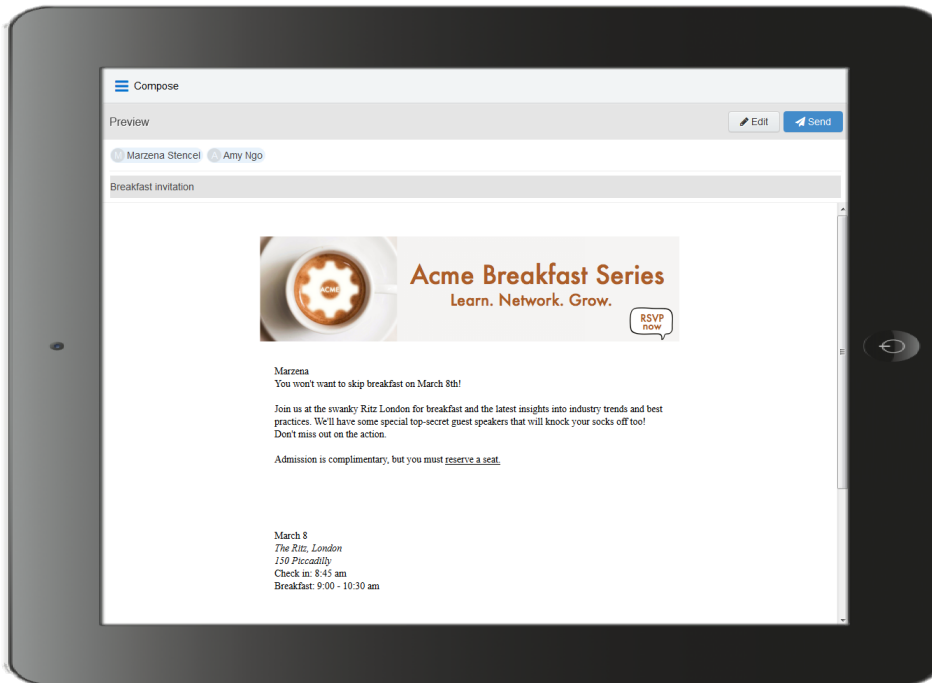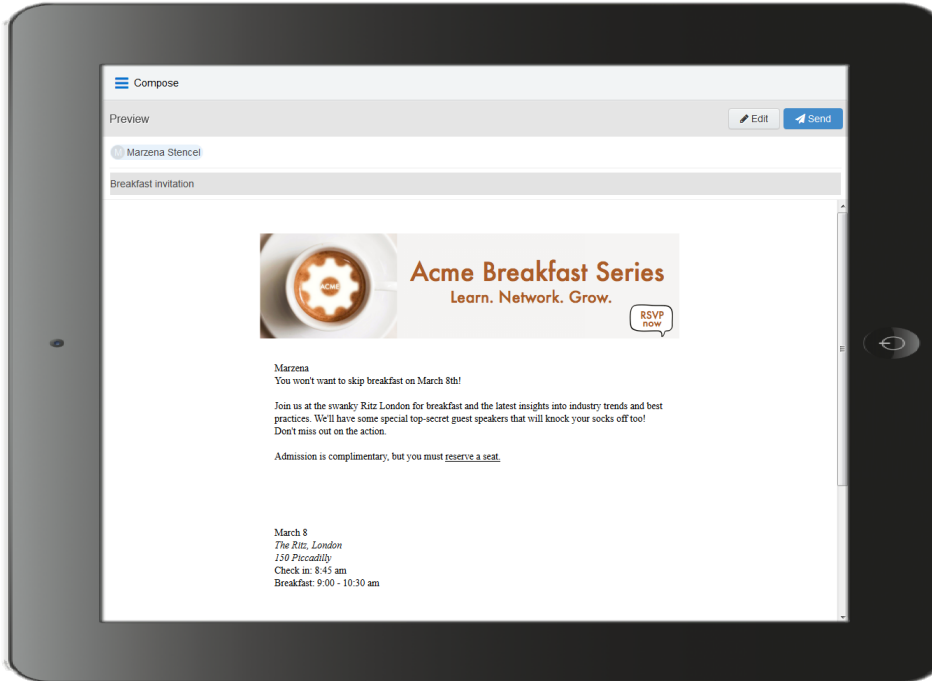
5. Click **Edit** in the preview screen to return to the Engage email and continue editing, or click **Send** to send the email.

> 💡 **Note**: The link tracking parameter is removed when you preview an email message, disabling the tracking on all links within a preview.

5.11 Modifying the *sent from* email address

You can modify the email address that your Engage (and other Oracle Eloqua) emails will be sent from.

> ℹ️ **Important**: This change will impact the *from* and the *reply-to* address when you send emails in Eloqua.

To modify the *sent from* email address:

1. In Oracle Eloqua, click **Settings** ⚙.

2. Click **Users** in the *Users and Security* section.

3. Select the desired user or create a new one.

4. Expand *General Info (Signature Fields)*.

5. In the *Email Reply-To Address* field, enter the desired *Reply-To* address.

6. Click **Save**.

6 Viewing email sent history

Your email sent history display the sent status of your previous emails. It is displayed when you log in to Engage and after you send an email.

To view email sent history:

1. Navigate to the Engage home page using one of the following methods:

   - Logging in to Engage.

   - Click the Engage icon .

   - Sending an email.

   Engage displays a list of successfully sent emails along with their sent status, date, and number of email opens and clicks.

   - A green icon indicates the email was sent successfully to all recipients.

   - An orange icon indicates the email was sent successfully to some recipients.

   - A red icon indicates the email was not sent successfully to any recipients.

Click the **Failed Email Sends** button to view emails which did not send.

2. Select an email to view additional details. Explore the different tabs to learn more about your sent email.

ORACLE Engage

Breakfast invitation

Thursday, June 15, 2017 3:47:48 PM

TO: Amy Ngo , Katie Mauti   **+ 1 more**

| Email | Sent ③ | Opens ④ | Clicks ③ |

If you are having trouble reading this email, read the online version.

Acme Breakfast Series
Learn. Network. Grow.

RSVP now

FirstName1
You won't want to skip breakfast on March 8th!

Join us at the swanky Ritz London for breakfast and the latest insights into industry trends and best practices. We'll have some special top-secret guest speakers that will knock your socks off too! Don't miss out on the action.

Admission is complimentary, but you must reserve a seat.

March 8
The Ritz, London
150 Piccadilly
Check in: 8:45 am
Breakfast: 9:00 - 10:30 am
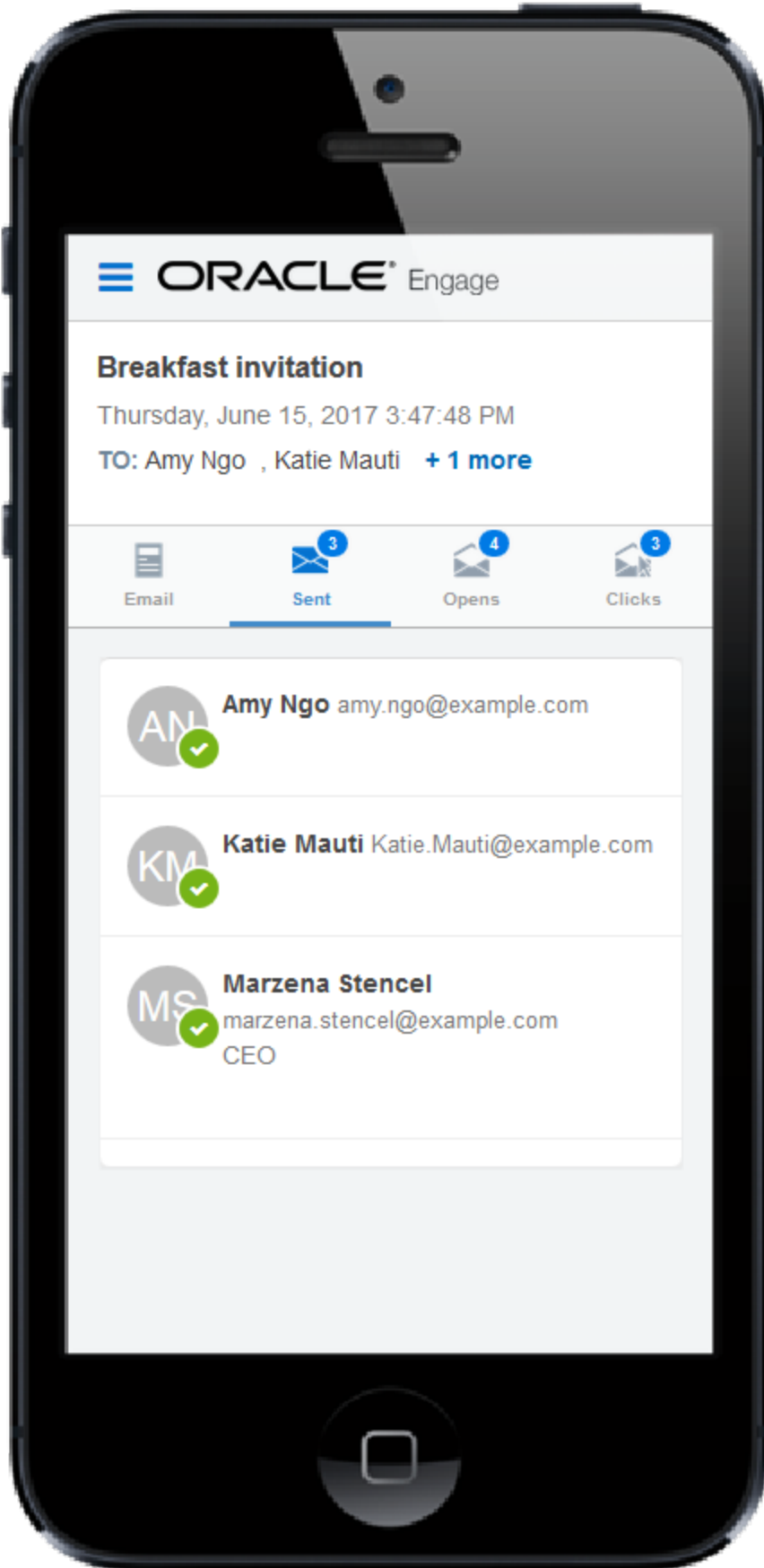
ORACLE Engage

Breakfast invitation

Thursday, June 15, 2017 3:47:48 PM

TO: Amy Ngo , Katie Mauti **+ 1 more**

| Email | Sent ③ | Opens ④ | Clicks ③ |

Amy Ngo amy.ngo@example.com

Katie Mauti Katie.Mauti@example.com

Marzena Stencel
marzena.stencel@example.com
CEO

ORACLE® Engage

Breakfast invitation

Thursday, June 15, 2017 3:47:48 PM

TO: Amy Ngo , Katie Mauti   **+ 1 more**

| Email | Sent **3** | Opens **4** | Clicks **3** |

Marzena Stencel **4**
CEO

Last Opened: Thu Jun 15 2017 03:49 PM EDT

Breakfast invitation

Thursday, June 15, 2017 3:47:48 PM

TO: Amy Ngo , Katie Mauti **+ 1 more**

| Email | Sent ③ | Opens ④ | Clicks ③ |

Marzena Stencel ③
CEO

Last Clicked: Thu Jun 15 2017 03:48 PM EDT
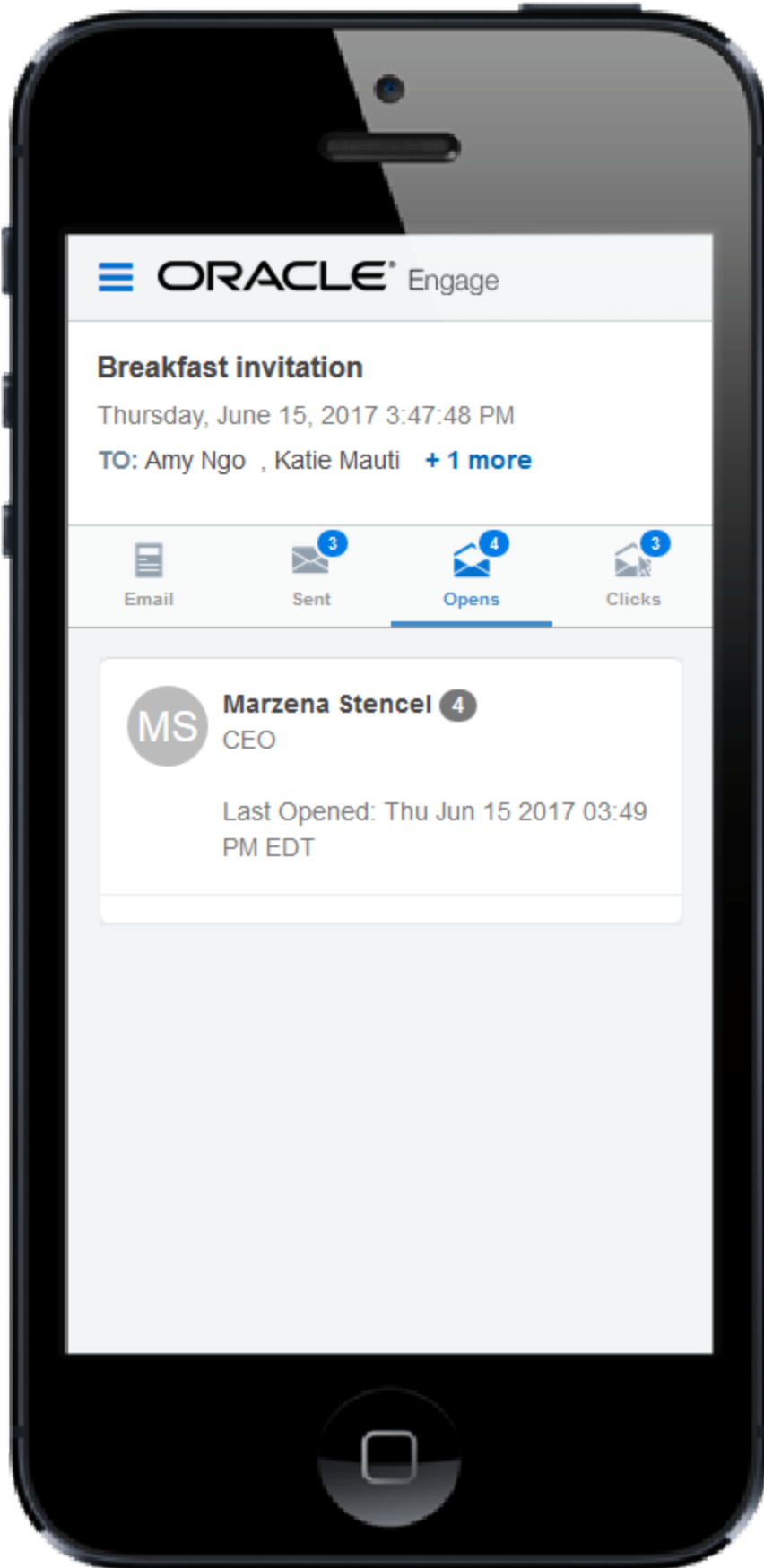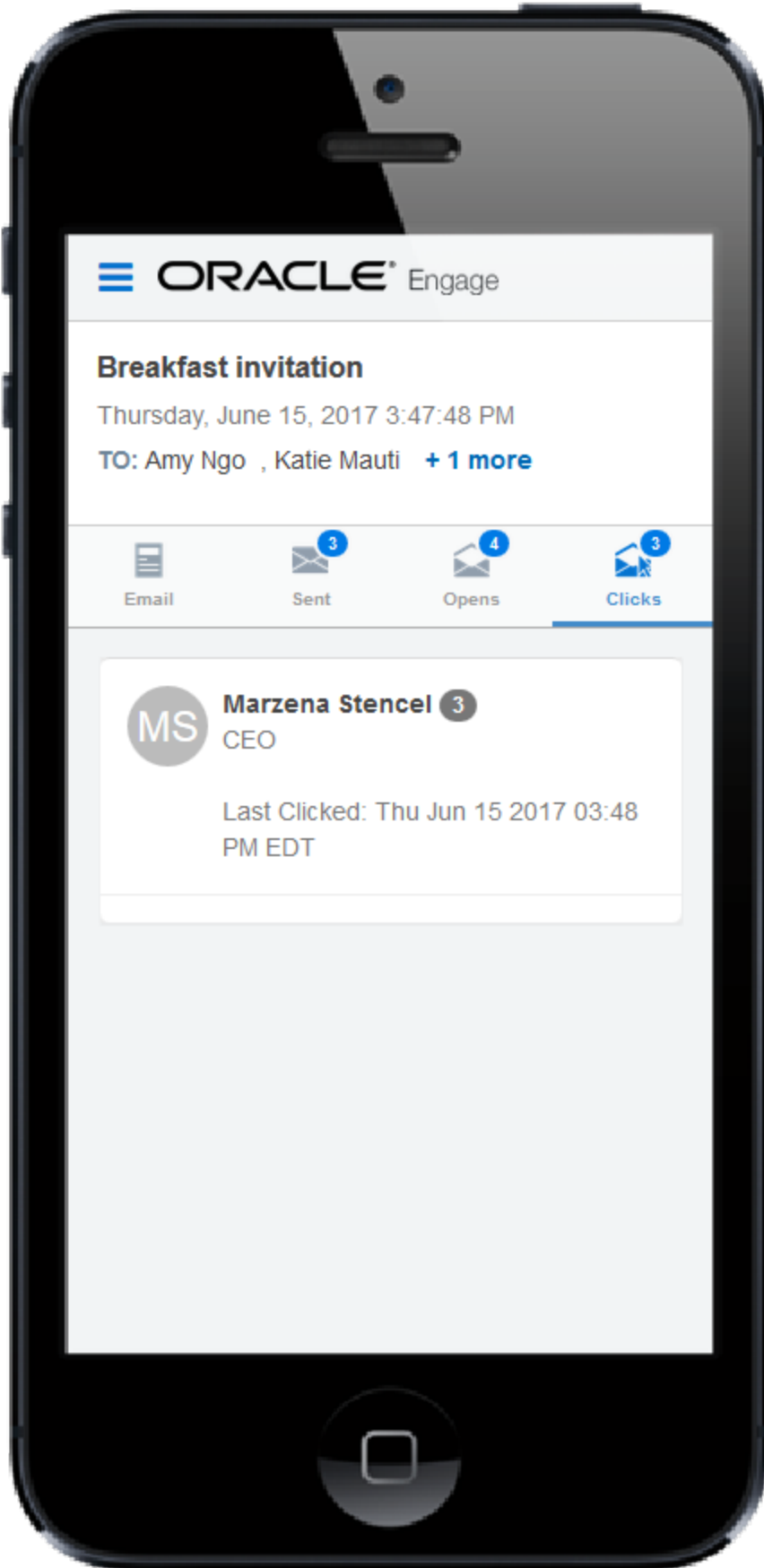
- *Emails* tab: Displays a thumbnail image of your email.

- *Sent* tab: Displays the recipients of the email. If you have a Profiler license, you can click a recipient's name to view additional details.

- *Opens* tab: Displays the recipients who opened the email. Learn more about how email opens are calculated.

- *Clicks* tab: Displays the recipients who clicked a link in the email.

7 Engage reports

Engage reports provide insight about the performance of your sent emails.

Access reports by opening Engage and clicking **Reports** on the sent emails page or directly at this URL: https://login.eloqua.com/apps/salesTools/engage/reports
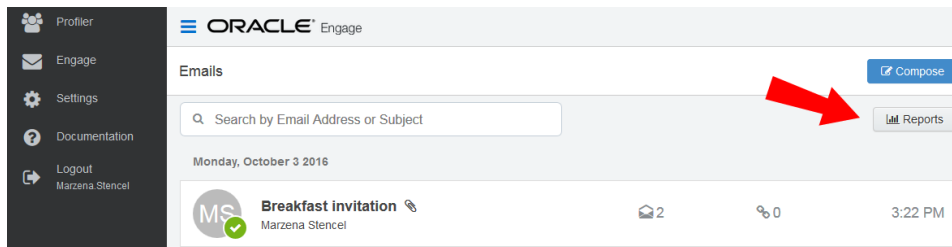
There are two Engage report types available:

- Engage Top Templates report

- Engage Emails By Recipient report

> 👍 **Tip**: Reports can be embedded in your CRM (similar to Engage and Profiler).

7.1 Engage Top Templates report

The Engage Top Templates report provides information about the performance of your templates over a given period. Therefore, you can reuse the templates that have the best performance.

7.1.1 Accessing the Top Templates report

To access the Top Templates report:

1. Open Engage.

2. Click **Reports** on the sent emails page.
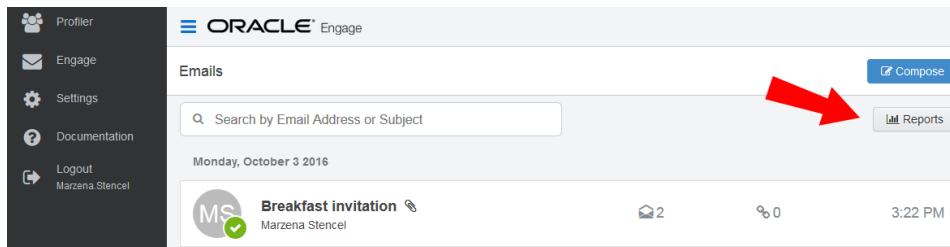
👍 **Tip**: You can send an email using one of the templates in your report results.
Click the template name to load the email compose screen.

7.1.2 Report filters

The report displays emails sent by the logged-in user.
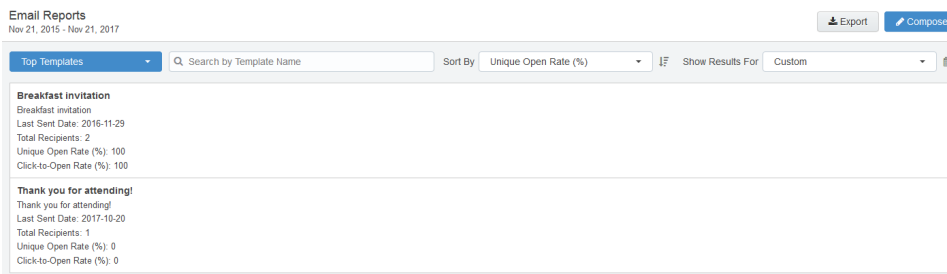
Use the search and date picker to limit the number of templates displayed:

- Search by template name.

- Filter results by date sent. Use the standard time frames from the drop-down list or enter a

custom date by clicking the calendar icon. The default time frame is the **Last Week**.

Show Results For   Custom

From

May 1, 2016

To

Nov 21, 2017

‹   **Nov 2017**

Su	Mo	Tu	We	Th	Fr	Sa
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	**21**	22	23	24	25
26	27	28	29	30	1	2
3	4	5	6	7	8	9
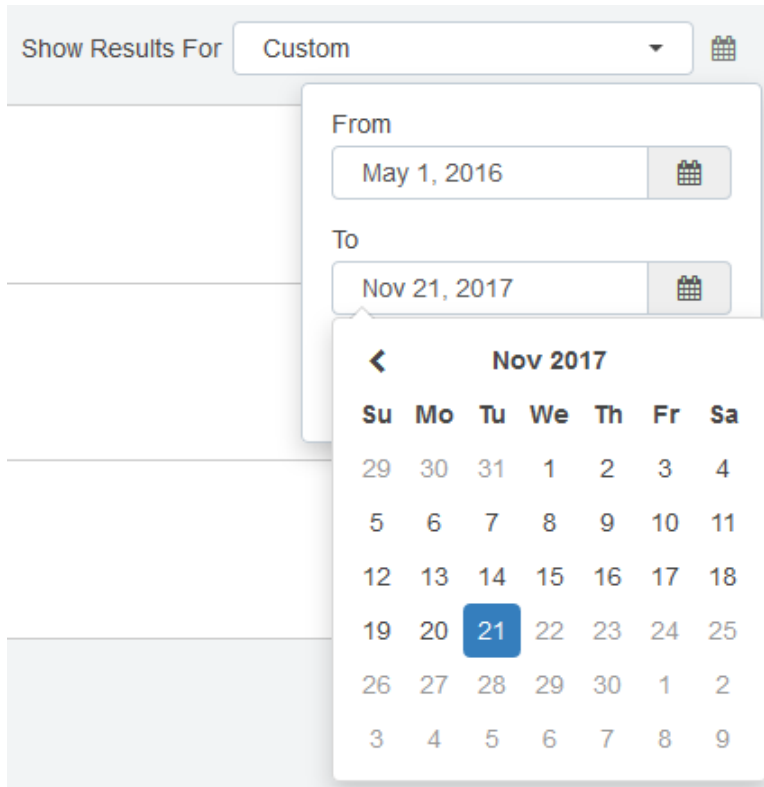
Results are sorted by highest unique open rate by default. Use the *Sort By* drop-down list to sort by a different metric.

Report metrics

This report captures the following metrics.

Metric	Description
Unique Open Rate	The unique opens divided by the total number of times an email was delivered. (Unique Opens / Total Delivered) A unique open is the number of recipients (original recipients or email forwards) that opened an email at least once. This does not count all the times that the same recipient opened the email.

Metric	Description
	Oracle Eloqua counts an email as opened if the recipient loaded the tracking pixel image contained in the email or clicked a link in the email. Learn more about how email opens are calculated.
Click-to-Open Rate	The unique clickthroughs sent divided by the unique opens sent. (Unique Clickthroughs Sent / Unique Opens Sent) A unique clickthrough sent is the number of original recipients that clicked at least one link in an email. This does not count clicks from possible forwards.Unique opens sent is the number of original recipients that opened an email at least once. This does not count opens from possible forwards.

7.2 Engage Emails By Recipient report

The Engage Emails By Recipient report provides information about who has opened and clicked on the emails you have sent over a given period of time.

7.2.1 Accessing the Emails By Recipient report

To access the Emails By Recipient report:

1. Open Engage.

2. Click **Reports** on the sent emails page.
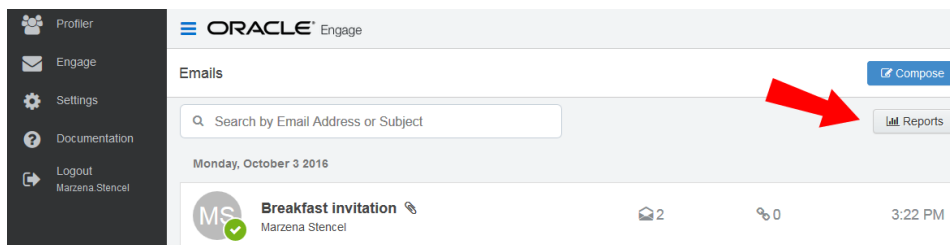
3. Click the **Top Templates** drop-down and select **Emails By Recipient**.
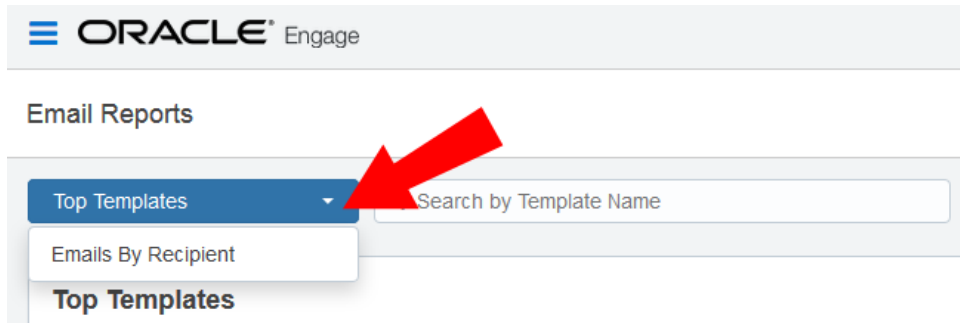
> 👍 **Tip**: You can select one or more recipients from this report and send a new email to them. Select your recipients and click **Compose**. Then select your template and create your email.

7.2.2 Report filters

The report displays a list of recipients for your sent emails. Emails sent to multiple recipients are listed individually.
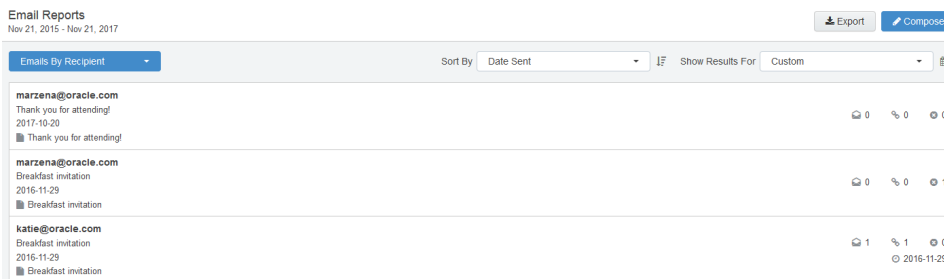
Use the date picker to limit the number of email recipients displayed. Use the list's standard time frames or enter a custom date by clicking the calendar icon. The default time frame is **Last Week**.
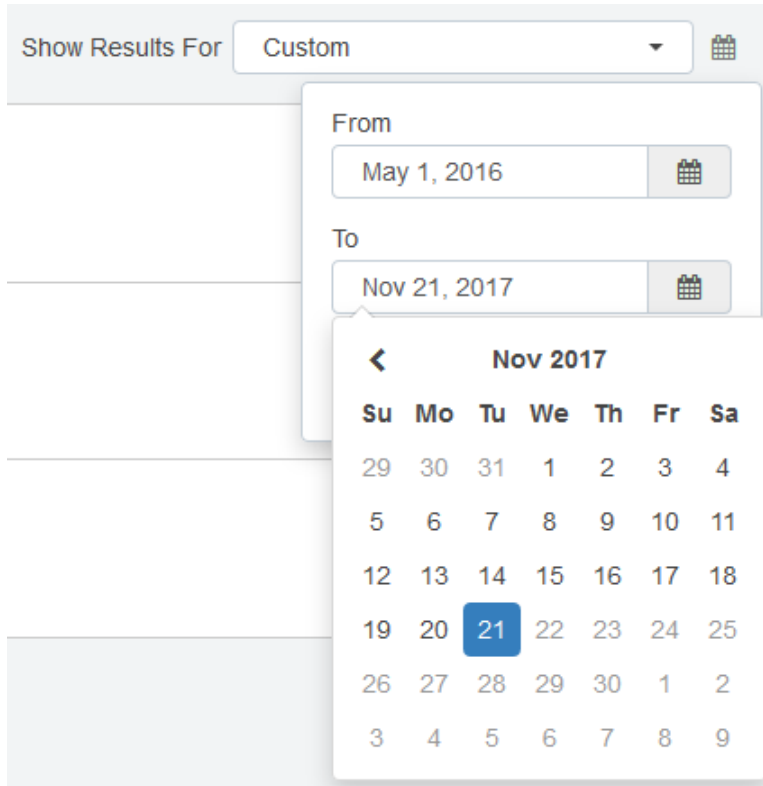
Results are sorted starting with the most recently sent email by default. Use the *Sort By* drop-down to sort by a different metric.

Report metrics

This report captures the following metrics.
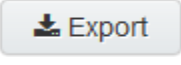
Metric	Description
Total Opens	The number of times an email was opened. This includes multiple opens by the original recipient or forwarded recipient. Oracle Eloqua counts an email as opened if the recipient loaded the tracking pixel image contained in the email or clicked a link in the email. For more information, see Calculating email opens.
Total Clicks	The number of times that any tracked link in an email was clicked. This includes multiple clicks by the same recipient.

Metric	Description
Hard Bouncebacks	The total number of emails that could not be delivered because of a hard bounceback. A hard bounce is an email that permanently could not be delivered. Some common reasons for hard bounces include an invalid email address or domain name.

7.3 Exporting Engage report results

The results from the Engage Top Templates and Emails By Recipient reports can be exported to a Microsoft Excel (.xlsx) file.

To export Engage report results:

1. Open either the Top Templates or Emails By Recipient report.

2. Use filters to narrow your results. Only the results matching your filer criteria will be exported.

3. Click **Export** ⬇ Export .

4. **Open** or **Save** the Microsoft Excel file to your machine.

> 💡 **Note**: The Microsoft Excel export file is capped at 10,000 rows.

8 Engage integration

Engage can be embedded in several customer relationship management (CRM) systems, including Oracle CRM onDemand and Salesforce. This integration makes it easier and more convenient for you to access the sales tool from within your chosen system.

Engage activities, including full emails, can be synched over to your CRM. The time it takes for a new contact or template to appear in your CRM depends on the integration rules setup between your Eloqua instance and your CRM.

You are able to access Engage via the CRM by embedding the login URL. If your CRM is Salesforce, Engage also supports using Salesforce as an identity provider.

8.1 Adding an Engage link to Oracle Sales Cloud

There are two main steps that you must follow to add an Engage link to your Sales Cloud account:

1. Create an Engage link

2. Add the Engage link to a layout

Step 1: Creating an Engage link

To create an Engage link:

1. Login with your Administrator credentials.

2. Click the **Navigator** icon, then under *Tools* click **Customization** > **Application Composer**.

3. In the left-side pane, select **Marketing** from the *Application* drop-down list.

4. Expand **Objects** > **Standard Objects** > **Sales Lead Contacts**, then select **Actions and Links**.

5. Click *Create* to create a link, then enter the following information:

- **Display Label**: Engage

- **Name**: Eloqua_Engage

- **Type**: Select *Link*

- **URL Definition**: Enter one of the following URLs:

  Direct:
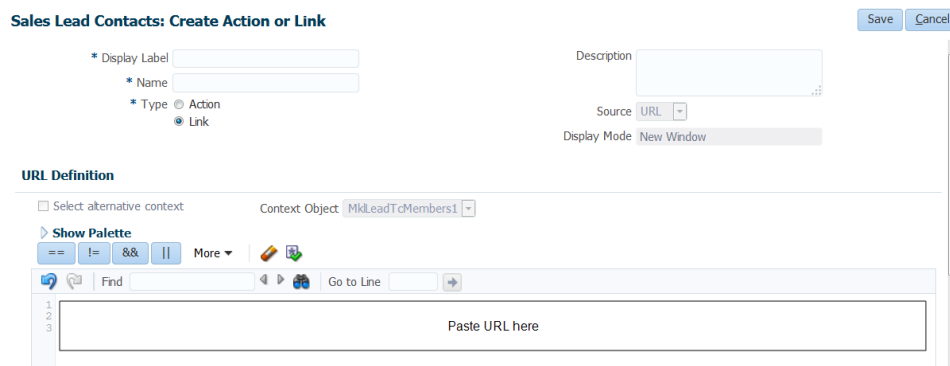
  def eURL="https://login.eloqua.com/apps/salesTools/engage?YYYY

  Auto-login:

  def eURL="https://login.eloqua.com/autoLogin?LoginPrefix=<Login

  Prefix>&Url=/apps/salesTools/engage?YYYY

  SAML:

  def eURL="https://login.eloqua.com/auth/saml2/autologin?LoginPrefix=<Login

  Prefix>&ReturnUrl=/apps/salesTools/engage?YYYY

> 💡 **Note**: YYYY is optional.
>
> To launch Engage with the contact's email address, replace YYYY with:
>
> sendTemplateToContacts/" + nvl(PersonEmail,"no email")
>
> To launch Engage with the template picker open, replace YYYY with:
>
> emailChooser=true
>
> To launch Engage with a specific template, replace YYYY with: emailId={templateID}

> 💡 **Note**: Replace LoginPrefix=<LoginPrefix> where prefix is a 4 character identifying code like 'ELQA'. You can alternatively use <siteID> with your site ID - a numeric code, like '33' (it may be much longer). If you do not know what your prefix is, log a Service Request ("SR") via My Oracle Support (support.oracle.com). You can also choose to ignore this parameter and it will attempt to log you in using the first Eloqua saved credential it finds.

6. Click *Validate* 🗹 to validate the script.

7. Click **Save**.

Step 2: Adding the Engage link to layouts

To add the Engage link to a layout:

1. In *Application Composer* left-side menu, locate the object used in Step 1 of this document, then click **Pages**.

2. Under the *Details Page Layouts* section, select the layout to which you want to add the link, then click *Edit* ✏️ .

3. Click the *Edit* icon next to *Contact Overview Form*.

4. Under the *Available Fields* column, select the Engage link that you created then click the

   ➤ arrow to move the link to the *Selected Fields* column.

5. Adjust the link's location on the list using the up and down arrows next to the list, then click **Save and Close**.

8.2 Embedding Engage as a tab or button in Salesforce

This section will walk your through modifying Engage so it is seamlessly available to Sales users inside Salesforce.com.

There are two ways Engage can be deployed within Salesforce:

- As a top navigational tab

- As a button on the Lead and Contact Page layouts

Embedding Engage as a tab in Salesforce

To embed Engage as a tab in Salesforce:

1. Log in to Salesforce.

2. Navigate to **Setup** > **Create** (under *Build* section) > **Tabs**.

3. Click **Edit** next to the *Engage* tab setup under the *Web Tabs* section for your Salesforce.

4. Click **Next** through the default tab settings until you are on Step 3, where you need to enter the URL for the button. Replace the existing URL in the *Button* or *Link URL* section with one of the following:

- **Direct**: `https://login.eloqua.com/apps/salesTools/engage`

- **Auto-login**: `https://login.eloqua.com/autoLogin?LoginPrefix=`
  `{prefix}&Url=/apps/salesTools/engage`

- **SAML**: `https://login.eloqua.com/auth/saml2/autologin?LoginPrefix=`
  `{prefix}&ReturnUrl=/apps/salesTools/engage`

- **Salesforce IDP**: `https://{podURL}/sso/sfdc/v1/svp.aspx?LP=`
  `{prefix}&RU=/apps/salesTools/engage`

> 💡 **Note**: Replace {*podURL*} with the URL in your browser after you have logged in successfully to Eloqua (for example, `secure.p01.eloqua.com`). Click here for additional information about how to determine your POD.`LoginPrefix` values are a four-character code for the company name that you enter in the Company field on the login page. To add this parameter to your URL, enter `LoginPrefix={prefix}` where `{prefix}` is replaced with the four characters company name. You can obtain your company's login prefix in Eloqua by navigating to Settings > Setup > Company Defaults.

> 👍 **Tip**: If SSO with Salesforce is configured, the use of either the SAML or Salesforce IDP method of integrating Sales Tools instead of the Direct method is recommended. The SAML link should be used if SSO with SFDC is setup using Eloqua's SAML capability. If using the Salesforce IDP option for SSO, the Salesforce IDP link should be used for integrating Sales Tools.

5. Save your changes. You should now be able to click on the **Engage** tab and be logged in seamlessly to Engage. Ensure you are logged in to Salesforce from your dedicated Salesforce domain and not the standard login.salesforce.com.

There can be multiple Engage buttons on the Lead/Contact page layout within Salesforce. The following steps will walk you through modifying the two most common buttons.

To embed Engage as buttons on Salesforce Lead and Contact Page layouts:

1. Log in to Salesforce.

2. Navigate to **Setup** > **Customize** (under Build section) > **Leads** > **Buttons, Links, and Actions**.

3. Find one of the buttons you created for Engage and click to edit. You most likely have multiple Engage buttons on the Lead/Contact objects. Each button can be used to either open a desired template, email specific recipients, and so on. Alternatively, you can click **New Button** or **Link** to start with a fresh button.

   a. Label and name the button something unique and easy to recognize.

   b. Under *Display Type*, select **Detail Page Button**.

   c. For behavior, select whether you want this button to launch Engage in an existing or new window and with or without the sidebar.

   d. In the main box, enter one of the following URLs, depending on your login method:

   - **Direct**: https://login.eloqua.com/apps/salesTools/engageZZZZ

   - **Auto-login**: : https://login.eloqua.com/autoLogin?LoginPrefix=<Login Prefix>&Url=/apps/salesTools/engageZZZZ

   - **SAML**: https://login.eloqua.com/auth/saml2/autologin?LoginPrefix=<Login Prefix>&ReturnUrl=/apps/salesTools/engageZZZZ

   - **Salesforce IDP**: https://<podURL>/sso/sfdc/v1/svp.aspx?LP=<Login Prefix>&RU=/apps/salesTools/engageZZZZ

Note: Replace {*podURL*} with the URL in your browser after you have logged in successfully to Eloqua (for example, `secure.p01.eloqua.com`). Click here for additional information about how to determine your POD.`LoginPrefix` values are a four-character code for the company name that you enter in the Company field on the login page. To add this parameter to your URL, enter `LoginPrefix={prefix}` where {*prefix*} is replaced with the four characters company name. You can obtain your company's login prefix in Eloqua by navigating to Settings > Setup > Company Defaults.

Tip: If SSO with Salesforce is configured, the use of either the SAML or Salesforce IDP method of integrating Sales Tools instead of the Direct method is recommended. The SAML link should be used if SSO with SFDC is setup using Eloqua's SAML capability. If using the Salesforce IDP option for SSO, the Salesforce IDP link should be used for integrating Sales Tools.

e. Replace ZZZZ with the action you want to assign to each button:

- Open the Template Chooser with a specific recipient: ...`?emailAddress={emailaddress}`

- Open a blank email: ...`?blank=true`

  This option opens a blank email if the creation of blank emails is allowed in your instance (managed in Engage Global Settings). If the creation of blank emails is not allowed, the email chooser opens and displays available templates (a blank email option is not available).

- Open a blank personal email with a specific recipient: ...`?blank=true&emailAddress={emailaddress}`

- Open a specific template: ...`?emailId={templateID}`

  To determine the *templateID*, find and open the email you are looking for in Eloqua and refer to the URL. The last portion of the URL is the value you substitute into your Engage URL as your *templateID*.

> 📖 **Example**: If the Eloqua URL for the email template is
> `https://secure.p02.eloqua.com/Main.aspx#emails&id=`**581**, append the
> following to your engage URL `...?emailId=`**581**. Your full Engage URL looks like
> this:
> `https://login.eloqua.com/apps/salesTools/engage/compose?emailId=58`
> `1`

- Open a specific template with a recipient: `...?emailAddress={`*emailaddress*`}&emailId=`
  `{templateID}`

- For multiple recipients, use commas or semicolons to separate them:
    - `?emailAddress={`*emailaddress1*`},{`*emailaddress2*`},{`*emailaddress3*`},...`
    - `?emailAddress={`*emailaddress1*`};{`*emailaddress2*`};{`*emailaddress3*`};...`

The first parameter must start with `?`; each parameter is separated by `&`.

> ⓘ **Important**: You must replace **{email_address}**:
> For lead objects, replace **{email_address}** with **{!lead.email}**.
> For contact object, replace **{email_address}** with **{!contact.email}**.

> 💡 **Note**: To determine your template id, open the template in Oracle Eloqua or Engage.
> The template id will be displayed in the URL.

Edit Lead Custom Button or Link
Eloqua Engage

4. Save all the changes to your buttons and test by loading a Lead/Contact. On a Lead/Contact record, clicking these Engage buttons should give seamless access to Engage. Ensure you are logged into Salesforce from your dedicated Salesforce domain and not the standard login.salesforce.com.

> 💡 **Note**: Creating a new button instead of modifying an existing one requires you to add that button to the page layout used by your organization. To do this, navigate to **Setup** > **Customize** (under *Build* section) > **Leads** (or **Contacts**) > **Page Layouts**. Add the button to the page layout, then select **Buttons** in the list. Drag the new button to the designated *Custom Buttons* area in the layout, then click **Save**.

8.3 Embedding Engage in Microsoft Dynamics 2013

Engage can be embedded in Microsoft Dynamics 2013.

To install Engage in Dynamics 2013:

1. Navigate to **Settings** > **Customization** > **Customizations** > **Customize the System**.

2. Select **Entities** > **Contact** > **Forms**.

3. Double-click the form you want to add Engage to (example, 'Main').

4. Click **Insert** in the top menu.

5. Add a *One Column Tab*. Name it whatever you like.

6. Add an IFRAME to this tab.
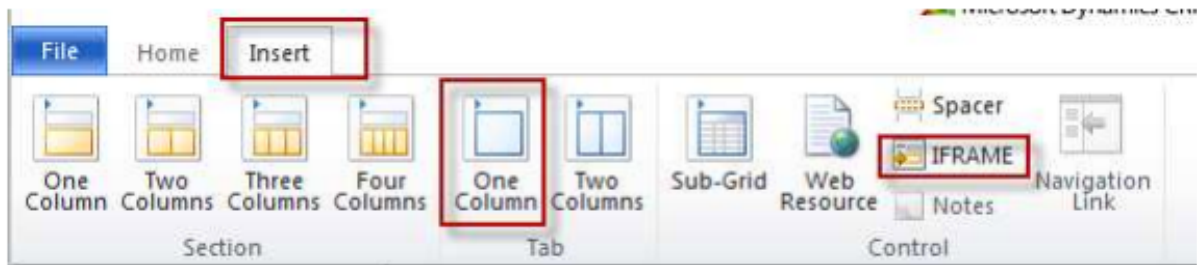
   a. *Name*: IFRAME_Engage

   b. *URL*: http://about:blank

   c. *Label*: Eloqua Engage

   d. Ensure that *Restrict cross-frame scripting* is unchecked

7. Select the *Formatting* tab. Modify the height by setting the number of rows (try 20).

8. Select the *Dependencies* tab. Add email as a dependent field.

9. Click **OK** to close the IFRAME window.

10. On the *Form* model, click **Form Properties**.

11. Click the *Events* tab.

12. Under Form Libraries, click **Add** and then click **New**.

    a. *Name*: new_EPPOnLoad

    b. *Type*: Script (JScript)

    c. Click **Save** and **Close**

13. Now double-click on the newly created Form Library **new_EPPOnLoad**.

14. In the *Text Editor* copy and paste one of the following code snippets (depending on your login choice).

    a. **Direct Login**

```
var newUrl = "https://login.eloqua.com/apps/salesTools/engage?YYYY

Xrm.Page.ui.controls.get("IFRAME_Engage").setSrc(newUrl);
```

    b. **Auto-Login**

```
var newUrl = "https://login.eloqua.com/autoLogin?LoginPrefix=<Login

Prefix>&Url=/apps/salesTools/engage?YYYY

Xrm.Page.ui.controls.get("IFRAME_Engage").setSrc(newUrl);
```

    c. **SAML SSO**

```
var newUrl = "https://login.eloqua.com/auth/saml2/autologin?LoginPrefix=<Login

Prefix>&ReturnUrl=/apps/salesTools/engage?YYYY

Xrm.Page.ui.controls.get("IFRAME_Engage").setSrc(newUrl);
```

> 💡 **Note**: YYYY is optional.
>
> To launch Engage with the contact's email address, replace YYYY with:
>
> emailAddress="+ document.getElementById("emailaddress1").title;
>
> To launch Engage with the template picker open, replace YYYY with:
>
> emailChooser=true
>
> To launch Engage with a specific template, replace YYYY with: emailId={templateID}

> 💡 **Note**: Replace LoginPrefix=<LoginPrefix> where prefix is a 4 character identifying code like 'ELQA'. You can alternatively use <siteID> with your site ID - a numeric code, like '33' (it may be much longer). If you do not know what your prefix is, log a Service Request ("SR") via My Oracle Support (support.oracle.com). You can also choose to ignore this parameter and it will attempt to log you in using the first Eloqua saved credential it finds.

15. Click **Save** and click on the newly created library.

16. Click **OK**

17. Click **Save**

Form Properties
Modify this form's properties.

Events | Display | Parameters | Non-Event Dependencies

Event List

◢ **Form Libraries**

Manage libraries that will be available in the form.

➕ Add | ✖ Remove | ⬆ Up | ⬇ Down | 📋 Edit

Name	Display Name	Description
new_EPPOnLoad	Engage	

◢ **Event Handlers**

Manage functions that will be called for form or field events.

ⓘ Adding events to the form will cause the form to load in edit mode.

Control [Form ▾]
Event   [OnLoad ▾]

➕ Add | ✖ Remove | ⬆ Up | ⬇ Down | ✎ Edit | 📋 Edit Library

Library	Function	Enabled
new_EPPOnLoad	window.EPPOnLoad	True

OK   Cancel

18. **Publish** the Model.

19. Repeat for the *Leads* entity, if desired.

8.4 Embedding Engage in CRM onDemand

When embedding Engage in CRM onDemand, there are two main steps that you must follow:

1. Create a web applet

2. Add the web applet to a page layout

> **Note**: You will need to create two applets – one for leads and one for contacts. The instructions below are for Contacts but you can follow the same procedure for Leads.

Step 1: Creating a web applet for contact and leads

To create a web applet:

1. Login to CRM onDemand with your Administrator credentials.

2. Navigate to **User** > **Configure** > **Admin**.
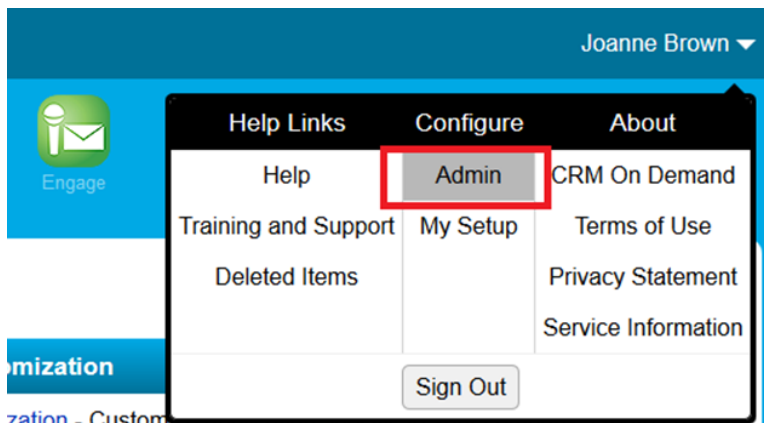
3. Click **Application Customization**.

4. Under *Record Type Setup*, click **Contact**.

5. Under *Pay Layout Management*, click **Contact Web Applet**, then enter the information below:

    -   **Name**: Enter a name. (Example: *Contact Engage*)

    -   **Location**: Select *Detail Page*

    -   **Type**: Select *URL*

- **URL**: Enter one off the following URLs

    - **Direct**: https://login.eloqua.com/apps/salesTools/engage?emailAddress%3D%%Email_Address%%%

    - **Auto-login**: https://login.eloqua.com/autoLogin?LoginPrefix=<Login Prefix>&Url=/apps/salesTools/engage?emailAddress%3D%%Email_Address%%%

    - **SAML**: https://login.eloqua.com/auth/saml2/autologin?LoginPrefix=<Login Prefix>&ReturnUrl=/apps/salesTools/engage?emailAddress%3D%%Email_Address%%%

- **Height**: Enter *800*
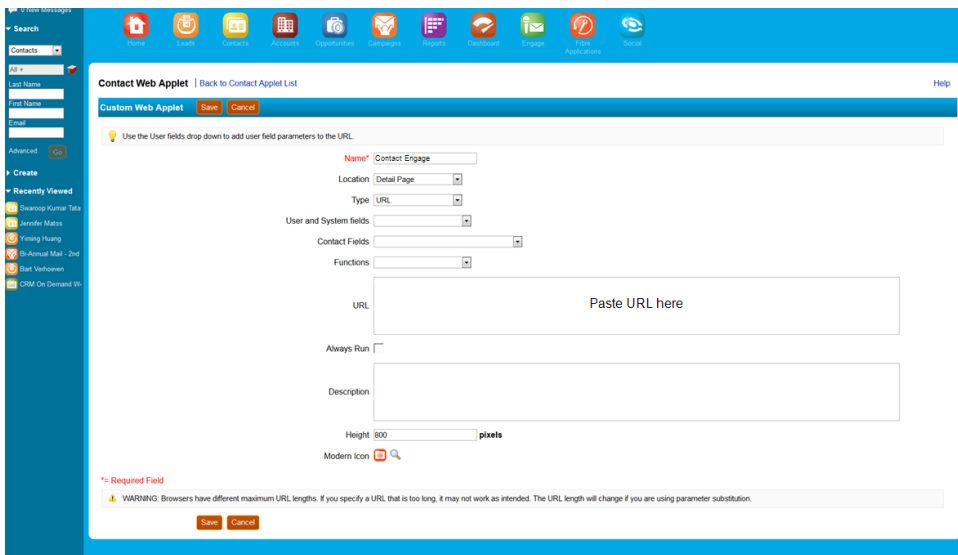
6. Click **Save**.

Step 2: Adding webs applet to page layouts

To add an applet to a page layout

1. Navigate to **User** > **Configure** > **Admin**.

2. Click **Application Customization**.

3. Under *Page Layout Management*, click **Contact Page Layout**.

4. Choose the page layout that you want to modify

> 💡 **Note**: It is not necessary to configure Steps 2 or 3. Click Step 4 (Related Information) to continue.

5. In the *Not Available Information* column, locate the web applet that you created, then highlight it (single left-click) and click the **>** arrow to move it to the *Available Information* column.

6. Select the applet in the *Available Information* column, then click the **>** arrow to move it to the *Displayed Information* column.

7. Click **Finish**.

> ❗ **Important**: Repeat the above steps for Leads

8.5 Embedding Engage in OKTA with SSO

This guide explains how to seamlessly configure and access Engage through OKTA.

8.5.1 Configuration

The high level configuration steps are as follows:

1. Configure Engage in OKTA with SSO

2. Accessing Eloqua Sales as OKTA apps

Step 1: Configuring Engage in OKTA with SSO

Engage is an app you can access via a URL from any location. It could be launched standalone in a browser but is most commonly are embedded inside a CRM system.

Once configured, you need to update Engage to work with OKTA so that access is seamless.

To configure SSO with OKTA into Engage:

1. Enter the following URL:

   https://login.eloqua.com/auth/saml2/autologin?LoginPrefix=<Login Prefix>&ReturnUrl=/apps/salesTools/engage

> 💡 **Note**: Replace LoginPrefix=<LoginPrefix> where prefix is a 4 character identifying code like 'ELQA'. You can alternatively use <siteID> with your site ID - a numeric code, like '33' (it may be much longer). If you do not know what your prefix is, log a Service Request ("SR") via My Oracle Support (support.oracle.com). You can also choose to ignore this parameter and it will attempt to log you in using the first Eloqua saved credential it finds. Replace <IDPid> with the IDP unique ID from your SSO setup.

> 💡 **Note**: To find your IDP unique ID in Eloqua, navigate back to the Identity Management Provider interface. Right-click on the name of the Identity Provider you set up for OKTA and click **Open Link in New Tab**.
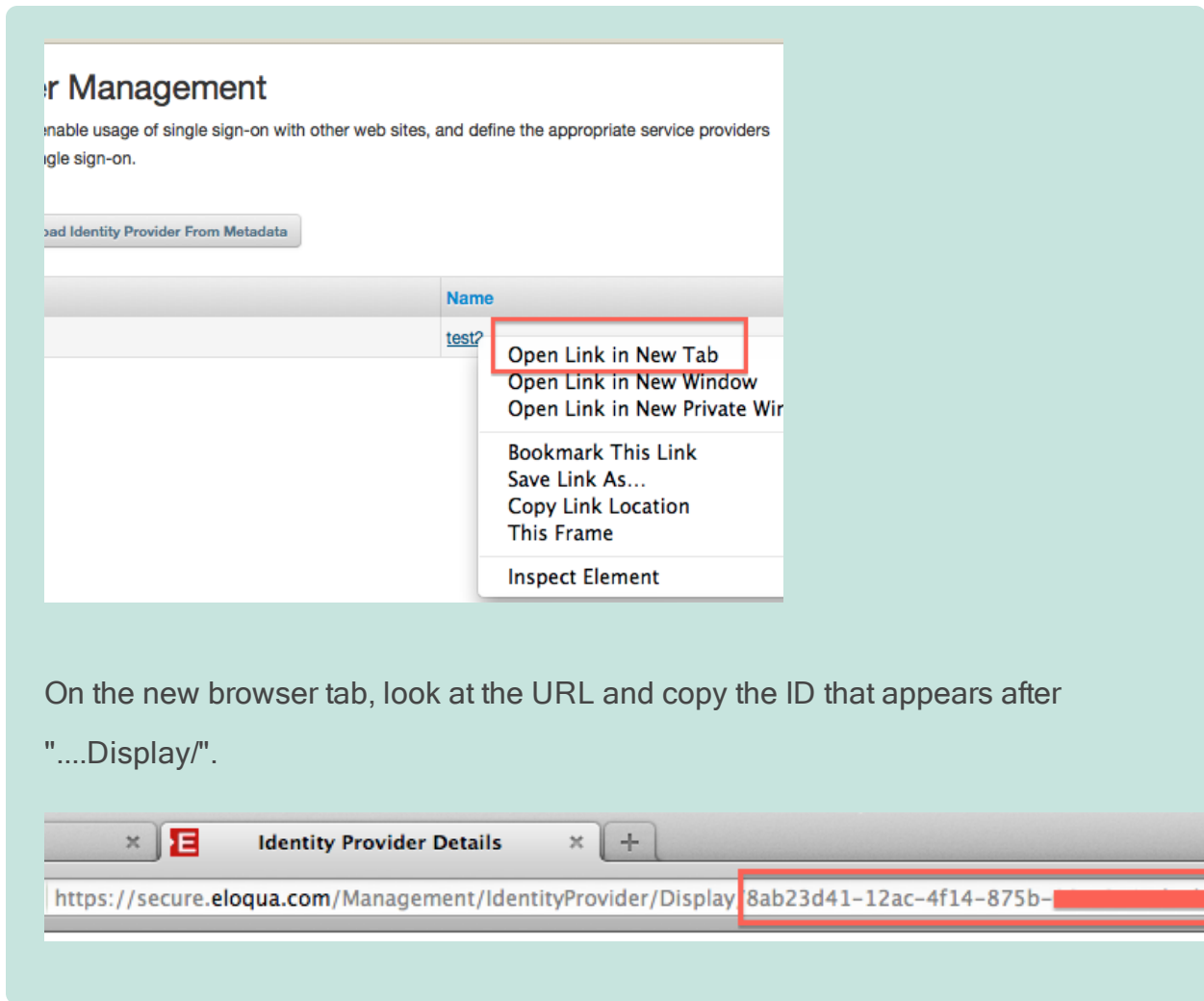
On the new browser tab, look at the URL and copy the ID that appears after "....Display/".

Once you have this properly formatted URL, as long as a user has an OKTA session active in their browser, the URL can be accessed from any location on the Internet and it will allow seamless access to Engage.

Step 2: Accessing Engage as an OKTA App

If you wish to allow users direct access to Engage from Apps in OKTA, you can do the following.

1. Repeat the SSO Configuration section above to create a new SAML2 template for Eloqua Engage.

2. While creating the SAML2 template, add the following to the **Default Relay State** field:

    ReturnURL=%2FsalesTools%2FEngage