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Oracle Eloqua Sales Tools for Microsoft Outlook
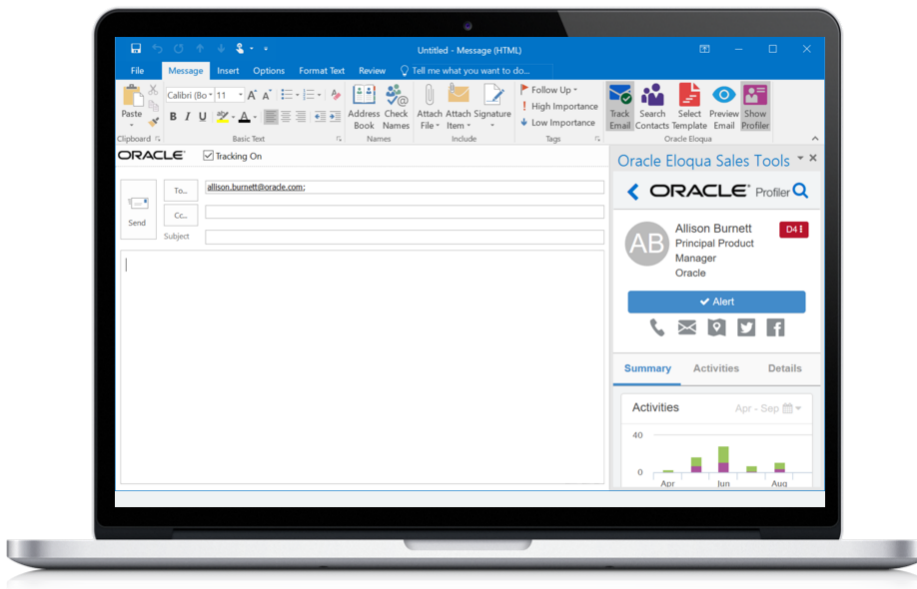
User Guide

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1 Oracle Eloqua Sales Tools for Microsoft Outlook

Oracle Eloqua Sales Tools for Microsoft Outlook is an add-in for Microsoft Outlook. It provides users with easy access to both Profiler and Engage straight through Microsoft Outlook's email composer, and comes packaged with similar capabilities as the native web and mobile versions of the (responsive) Profiler and Engage. This provides a seamless and consistent experience for sales users that work across a range platforms and devices. Sales users who leverage Microsoft Outlook as their primary tool to interact with key prospects on a day-to-day basis have the ability to gain rich insight in cross-channel buyer behavior, and access to marketing approved email templates without having to leave their email platform of choice.

Oracle Eloqua Sales Tools for Microsoft Outlook is provided free of charge as an add-in to all Engage customers. The use of Profiler is supported but optional for customers with both Engage and Profiler licenses. Emails are sent through Microsoft Outlook, and are

created and visualized in Engage for sales users to review and track. An email activity is created for each recipient.

Below is an overview of the features that can be accessed with the add-in:

Oracle Eloqua Profiler	Oracle Eloqua Engage
Analyze Digital Body Language by drilling into cross-channel buyer activities including email open/clicks, form submission, web activity and more.	**Engage with Insight** leveraging pre-approved marketing templates or personal emails without having to leave the Outlook email composer.
Browse Lead Scores to identify the right opportunity to chase for your buyers and prospects.	**Track Every Interaction** by enabling tracking on Outlook Emails, whether you're using a marketing template or writing a more personal email.
Set-up Web Alerts and get notified once a key prospects visits your website	**Leverage Marketing Approved Content** by having access to email templates straight within Microsoft Outlook.

Learn more by watching the video!

2 Frequently asked questions

The following are some of the questions most often asked about Oracle Eloqua Sales Tools for Microsoft Outlook.

Q. What license do I need to access the Sales Tools for Microsoft Outlook add-in?

A. Sales users require, at a minimum, the Oracle Eloqua Engage license. To have access to Profiler inside the Outlook add-in, sales users will also need the Profiler license.

Q. Are there any additional costs to use the Sales Tools for Microsoft Outlook add-in?

A. No, the Microsoft Outlook add-in will be provided free of charge for Oracle Eloqua Engage customers.

Q. What are the differences between Engage and the Sales Tools for Microsoft Outlook add-in?

A. The two products have a very similar feature set, with a handful of key differences.

Functionality	Engage	Outlook
Tracked emails	✅	✅
Contact creation	✅	✅
Contact lookup	✅	✅

Functionality	Engage	Outlook
Preview an email prior to send	✅	✅
Field merges	✅	✅
Inserting additional field merges, not included in email templates	✅	❌
Access to templates	✅	✅
Support for protected templates created by marketing	✅	❌
Eloqua Profiler embedded / accessible	✅	✅
Plain text email	✅	❌
Contact validation:		
Unsubscribed	✅	✅
Bouncebacks	✅	✅
Master exclude	✅	✅
Contact security	✅	✅
User able to save emails as templates / share with other users	✅	❌
Cloud content	✅	❌
Insertion of attachments from Eloqua	✅	❌
SSO	✅	✅
Localized	✅	✅
Restrict number of contacts per email send	✅	❌
User upload of images to Eloqua	✅	❌

Q. Are emails sent through Microsoft Outlook or Eloqua (Engage)?

A. Emails are sent through Microsoft Outlook, and calls Eloqua so that emails are created and visualized in Engage for sales users to review and track. An email activity is created for each recipient.

Q. Do emails sent through Microsoft Outlook appear in Engage?

A. Yes, emails sent from Microsoft Outlook that are tracked with the add-in will appear inside the sent list in Engage.

Q. How do users get started using Microsoft Outlook add-in?

A. Users with a license of Engage will be able to download a file and install it on their local machine. For customers looking to deploy to large volumes of users, the add-in also comes with administrative capabilities for IT teams to deploy at scale.

Q. Is the add-in localized?

A. Yes, it is localized into the same languages that are supported by the Sales Tools suite. See language support for a list of those languages.

Q. How many tracked emails can users send at a time?

A. Users are limited to 100 tracked emails that can be sent at one time.

Q. Why are locked sections in email templates not supported in Microsoft Outlook?

A. Microsoft Outlook does not support locked regions within an email. When users insert an email template, all sections of the template will be editable. Customers should start to audit their existing templates and plan accordingly.

Q. Is sign on with SSO supported?

A. Yes, after installing the add-in, users will login to the standard Eloqua login screen with their credentials and can choose **Sign in with SSO or another account**.

Q. How long will it take for a contact's subscription status to reflect in the Outlook add-in?

A. The status will typically be updated within five minutes, but could be as long as thirty minutes.

Q. Is Eloqua 9 (E9) supported?

A. The add-in consumes Eloqua APIs and for that reason is not tied to a specific version of the Eloqua application. However, Engage is not supported for E9, so E9 customers would not be able to leverage analytics on email sent with Microsoft Outlook within Engage

3 Installing Oracle Eloqua Sales Tools for Microsoft Outlook

Oracle Eloqua Sales Tools for Microsoft Outlook is an add-in for Microsoft Outlook. It provides users with easy access to both Profiler and Engage straight through Microsoft Outlook's email composer, and comes packaged with similar capabilities as the native web and mobile versions of the (responsive) Profiler and Engage.

Prerequisites

- An Engage license is required. Profiler is supported if you have a Profiler license, but is not required to use the add-in.

Prior to installing Oracle Eloqua Sales Tools for Microsoft Outlook, ensure that your system meets the following requirements:

Microsoft Outlook	• Microsoft Outlook 2010 SP1 / Microsoft Outlook 2010 SP2 • Microsoft Outlook 2013 / Microsoft Outlook 2013 SP1 • Microsoft Outlook 2016
Operating system	• Microsoft Windows 7 SP1 • Microsoft Windows 8.1 and higher • Microsoft Windows 10 💡 **Note**: Microsoft Outlook for Mac OS is not currently supported.
Microsoft Exchange Server	• Microsoft Exchange Server 2010 • Microsoft Exchange Server 2013

	• Microsoft Exchange Server 2016 • Microsoft Office 365
Mailbox storage	• OST in Cached Exchange Mode (default mode) • PST
Microsoft .NET Framework	v.4.5 must be installed on the computer where add-in will be used. It is installed by default for all mentioned OS versions except Windows 7
Default email application (Optional)	Users can open a compose window in Microsoft Outlook when clicking on a contact's email address within Profiler. In order for a compose window to open in Outlook, users must configure Microsoft Outlook to be the default email application on their machine.

To install Oracle Eloqua Sales Tools for Microsoft Outlook:

1. Ensure Microsoft Outlook is not currently running on your machine. If it is open, you will be prompted to close it before installing the add-in.

2. Follow one of the URLs below, depending on your Windows operating system:
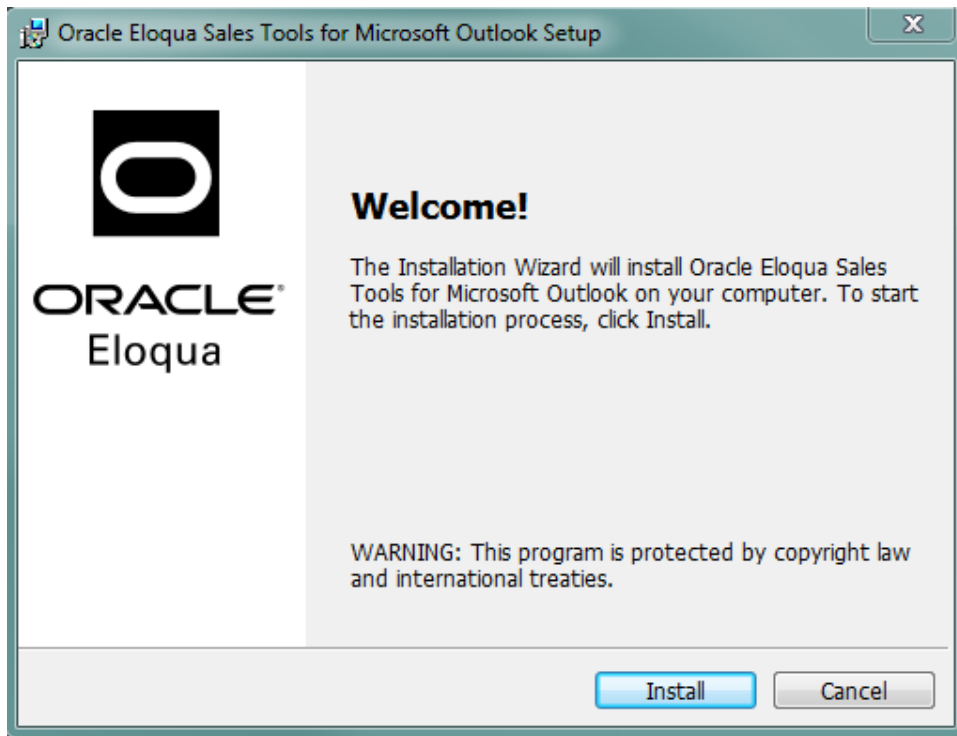
   Windows 32-bit:

   https://cloud.oracle.com/marketplace/app/SalesToolsMicrosoftOutlookWin32

   Windows 64-bit:

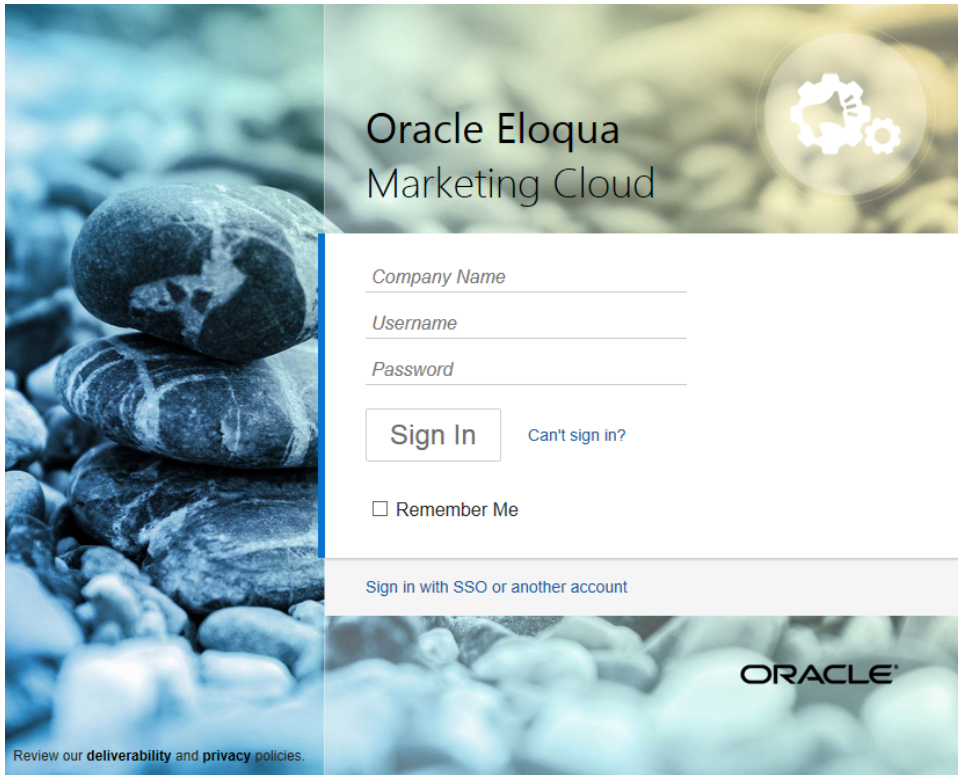   https://cloud.oracle.com/marketplace/app/SalesToolsMicrosoftOutlookWin64

3. Click **Get App**.

4. Follow the instructions in the installation wizard, then click **Finish**.
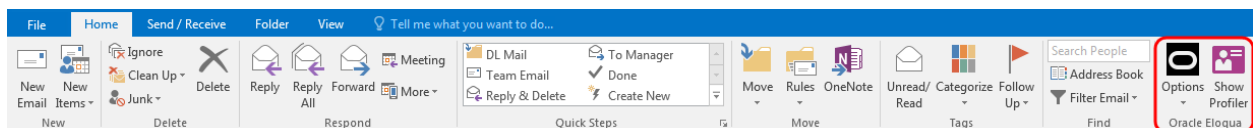

5. Open Microsoft Outlook.

6. Sign in to Oracle Eloqua using your company name and credentials. If your company leverages single sign-on, click **Sign in with SSO or another account**.

> 💡 **Note**: Signing in is required only for the first run of the Oracle Eloqua Sales Tools for Microsoft Outlook add-in.

The Oracle Eloqua Sales Tools for Microsoft Outlook add-in is now installed and visible in the ribbon.

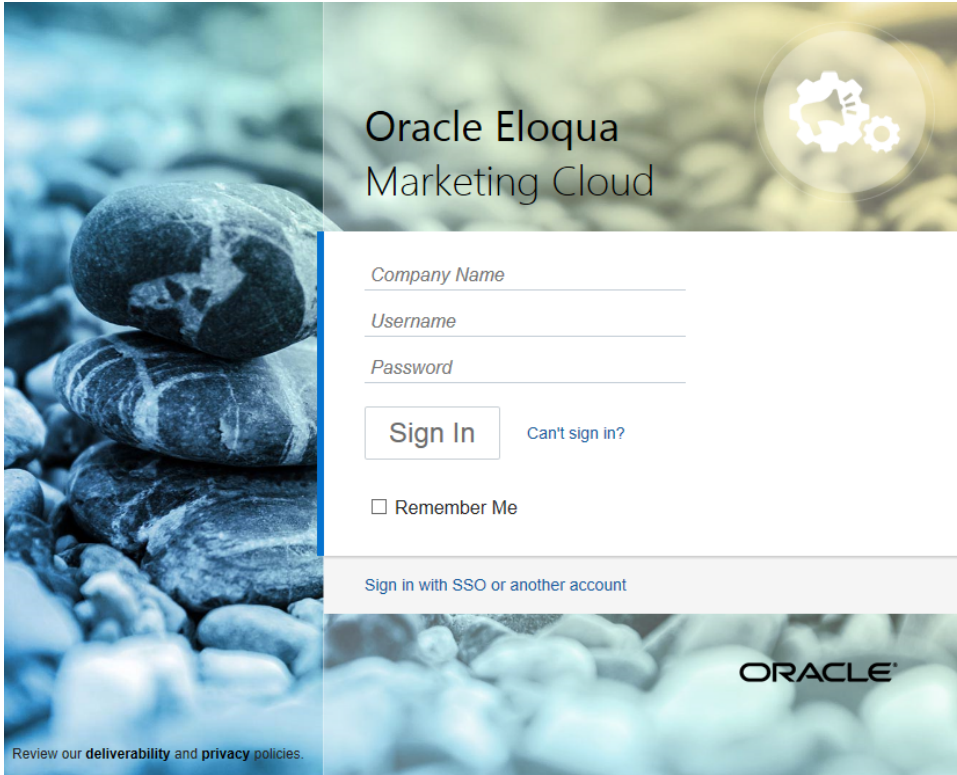# 4 Accessing Oracle Eloqua Sales Tools for Microsoft Outlook

This topic outlines how to access the Oracle Eloqua Sales Tools for Microsoft Outlook add-in once it has been installed.

Prerequisites

- Oracle Eloqua Sales Tools for Microsoft Outlook must be installed.

- An Engage license is required. Profiler is supported but a Profiler license is not required to use the add-in.

To access Oracle Eloqua Sales Tools for Microsoft Outlook:

1. Open Microsoft Outlook.

2. Click **Options** > **Sign In** from the main ribbon, or open an email and click **Sign In**.

3. Sign in to Oracle Eloqua using your company name and credentials. If your company leverages Single Sign-On, click **Sign in with SSO or another account**.

Oracle Eloqua
Marketing Cloud

Company Name

Username

Password

Sign In   Can't sign in?

☐ Remember Me

Sign in with SSO or another account

ORACLE

Review our **deliverability** and **privacy** policies.

💡 **Note**: Signing in is required only for the first run of the Oracle Eloqua Sales Tools for Microsoft Outlook add-in.

5 Sending a tracked email using Oracle Eloqua Sales Tools for Microsoft Outlook

Use Oracle Eloqua Sales Tools for Microsoft Outlook to send a tracked email directly through Microsoft Outlook. Eloqua is called so that sent messages are created and displayed in Engage's sent list for sales users to review and track. Email activity is created for each recipient.

Prerequisites

- Oracle Eloqua Sales Tools for Microsoft Outlook must be installed.

- An Engage license is required. Profiler is supported but a Profiler license is not required to use the add-in.

To send a tracked email using Oracle Eloqua Sales Tools for Microsoft Outlook:

1. Open a new email in Microsoft Outlook.

2. Tracking is enabled by default when the add-in is installed. The **Tracking On** box is checked and **Track Email** option in the ribbon is selected. You can manually toggle these options to disable and enable tracking for individual emails. When the **Tracking On** box is cleared, the message is sent as a personal email and is not tracked.
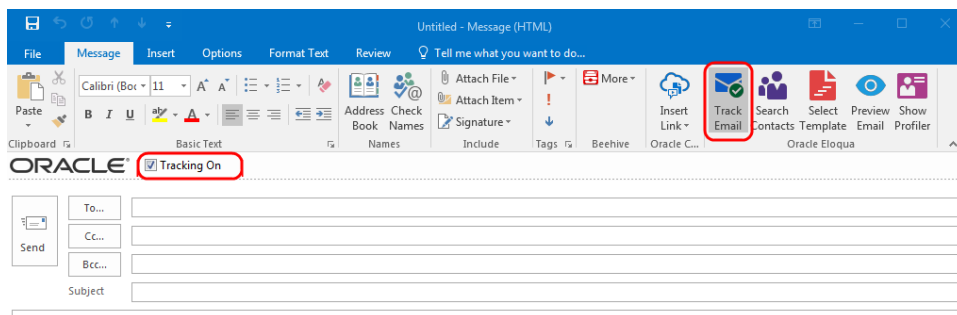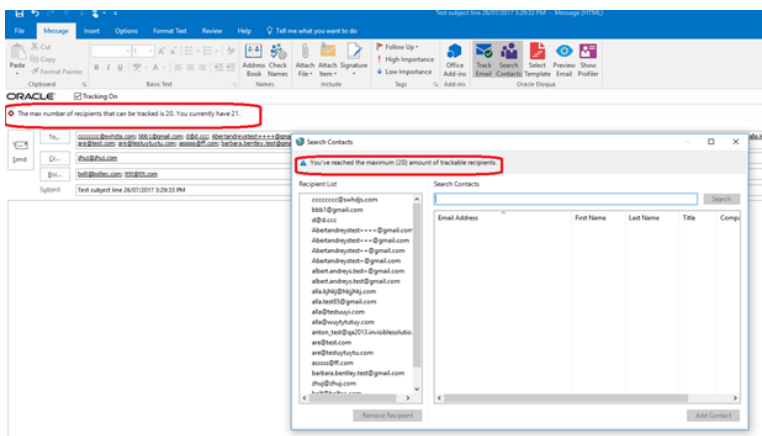
👆 **Tip**: To automatically track all emails, in the main ribbon, navigate to **Options** > **Settings** and check **Always track new emails**.
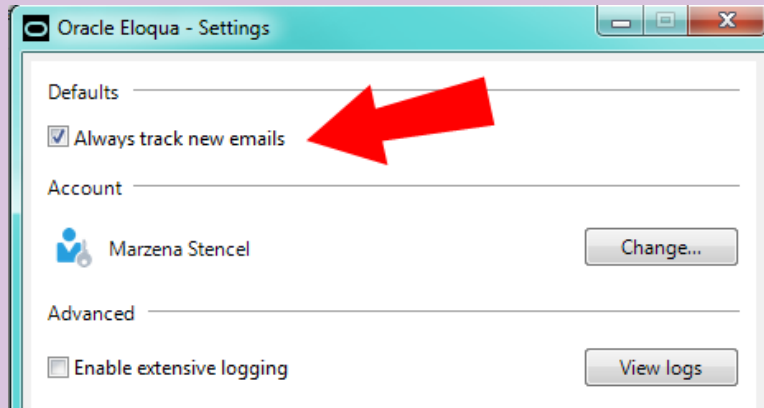

3. Add your recipients by manually entering email addresses or searching Oracle Eloqua contacts.

ℹ **Important**: The maximum number of recipients that can be tracked is 100.


- The add-in automatically verifies if manually entered recipients are Oracle Eloqua contacts. If they are not contacts, a *Fix Validation Issues* link is displayed. Click the link to add them as contacts

before sending the email. You can also remove the recipients if you do not wan tot add them as contacts.
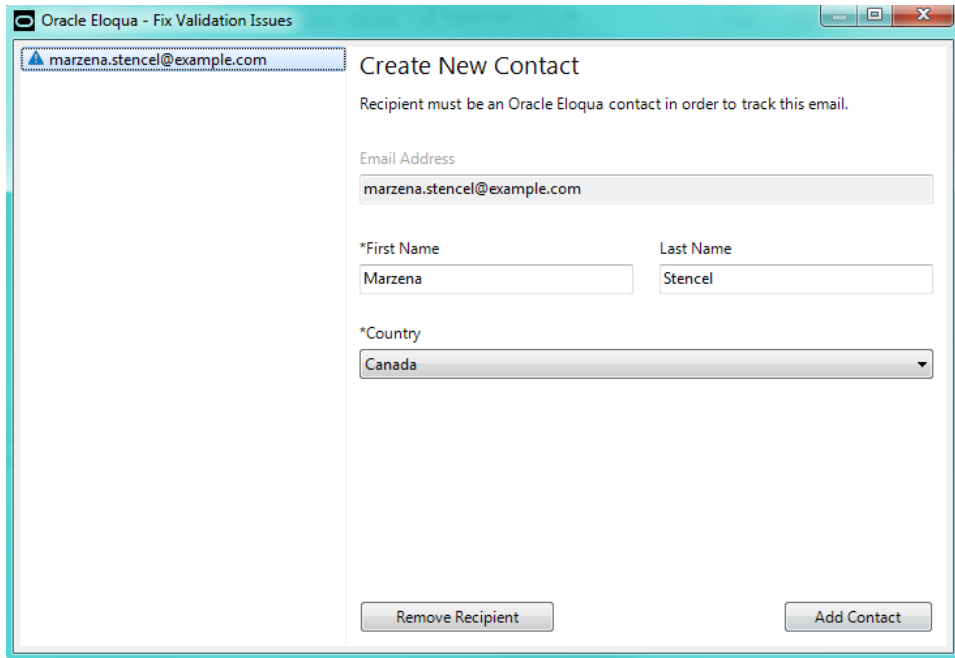
- To search for Oracle Eloqua contacts, click **Search Contacts** in the ribbon.
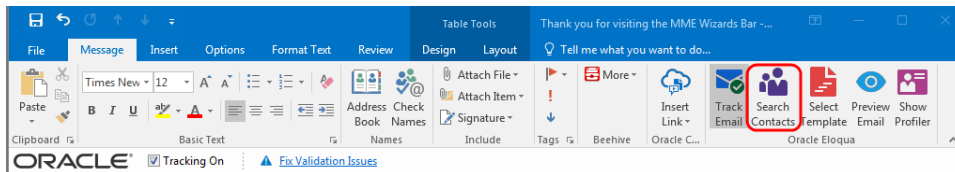
Search contacts by name or email address. Using Microsoft Outlook's standard contact search (by clicking *To...* or *Cc...*) will not search Oracle Eloqua contacts. Click **Add Contact** to add them to your recipient list. At least 3 characters must be specified to search.

> ℹ **Important**: Contact match and search is based on the contacts you have access to based on your Oracle Eloqua user permissions.

4. Write a personal email or select an Oracle Eloqua template.

- To select a template, click **Select Template** in the email ribbon. You can search templates by its name. At least three characters must be specified to search. Narrow the search by selecting specific email groups. Sort templates by name, creation date, or modified date. Click **Apply** to use the selected template in your email and override the current subject and body content (if any) of your email.
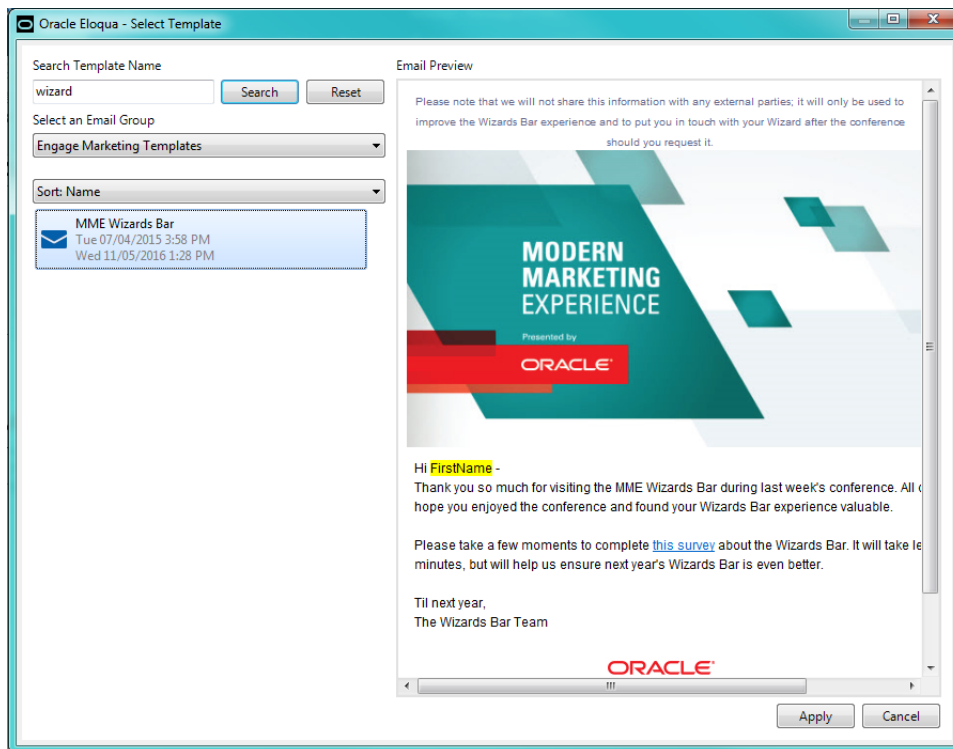
> 💡 **Note**: Templates with Cloud Content cannot be used but they are still searchable. The *Apply* button will be disabled when these templates are selected.

- Microsoft Outlook does not support locked regions within an email. Once you select a template, all sections will be editable.

- After a template is selected, the contacts are validated to check if they have the required field merges. If not, you will be prompted to add the missing field merges before sending the email.

5. Click **Preview Email**. The preview allows you to take a peek at how the email will look like for the first recipient in the list, including any field merges. In order to preview the email, the first recipient must be validated and the subject cannot be empty. Close the preview and make any necessary edits.

6. Click **Send**. Oracle Eloqua Sales Tools for Microsoft Outlook validates recipients to check for any problems and will prompt you to fix any issues that are found.
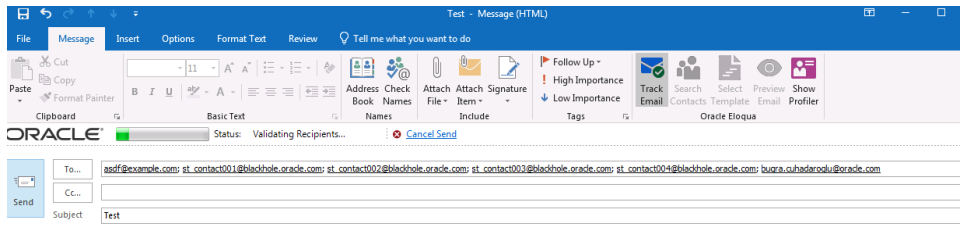
7. After validation is complete, tracking parameters are added to the email. Click the **Cancel Sending** link to stop the email from being sent during this process. As an email is sent to each contact, they are removed from the *To* line.
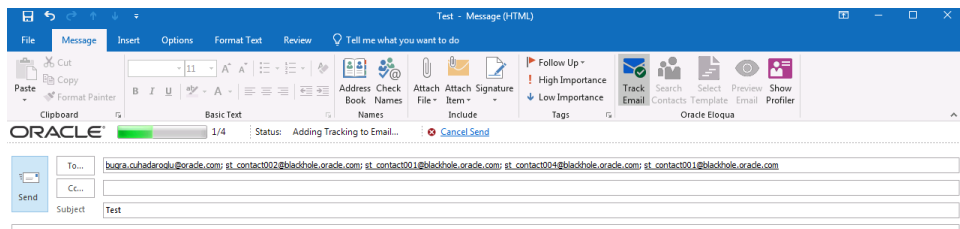
Your email has been sent to your recipients and appears in your Microsoft Outlook *Sent Items* folder. It is automatically assigned an *Tracked by Eloqua* category. Email sent metrics are also displayed. Learn about sent email metrics.

> ♀ **Note**: You cannot use any files (pictures, documents, and so on) as Microsoft Outlook email attachments as they are not accessible from the add-in. However,

you can add attachments to the email from your machine. These attachments are not tracked. Oracle Eloqua attachments are currently not accessible.

6 Sent email metrics

Once a tracked email is sent using Oracle Eloqua Sales Tools for Microsoft Outlook, email metrics, such as opens and clicks, are collected. The metrics are available when viewing the email in the Microsoft Outlook Sent Items folder, Engage and reporting solutions, such as Insight.

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.
Last Open	The most recent date and time the email was opened.
Total Clicks	The number of times that any tracked link in an email was clicked. This includes multiple clicks by the same recipient.

When reviewing metrics, note the following:

- Open statistics are only captured if the email recipient has the *display images* setting enabled for the email.

- When the email is forwarded or replied to, and the subsequent email is opened, the opens count towards the total opens.

- The *enable tracking* feature does not impact the behavior of Microsoft Outlook.

7 Validation issues in Oracle Eloqua Sales Tools for Microsoft Outlook

Validating recipients involves checking all email recipients against the Oracle Eloqua directory.

The validation process is always triggered automatically in the following cases:

- When a recipient is manually added to the recipient list

- When the contact lookup dialog is closed

- When an email is previewed

- When an email is sent

The validation process determines whether email recipients match certain conditions and all validation issues must be fixed in order to send the tracked email:

- Are the recipients Oracle Eloqua contacts? To fix the issue, add recipients as contacts.

- Is all the information required for field merges in the selected template complete? To fix the issue, add the missing contact information required for the field merges in the template.

- Can the email be sent to all contacts? For example, have any contacts unsubscribed or will be bounced back? To fix the issue, remove any contacts who are excluded.

A green checkmark is displayed once all validation issues have been resolved and the tracked email can be sent.

8 Accessing Profiler in Oracle Eloqua Sales Tools for Microsoft Outlook

Oracle Eloqua Profiler can be accessed in Microsoft Outlook. With Profiler you are able to view the contact details for a potential client, their activities, their lead score value, and so on. Viewing a contact's information can help you decide what type of email to send to them.

Prerequisites

- Oracle Eloqua Sales Tools for Microsoft Outlook must be installed.

- An Engage license is required. Profiler is supported but a Profiler license is not required to use the add-in.

To access Profiler in Oracle Eloqua Sales Tools for Microsoft Outlook:

1. Open Microsoft Outlook.

2. Click **Show Profiler** from the main ribbon, or open an email and click **Show Profiler**. Sign in to

Oracle Eloqua, if required.
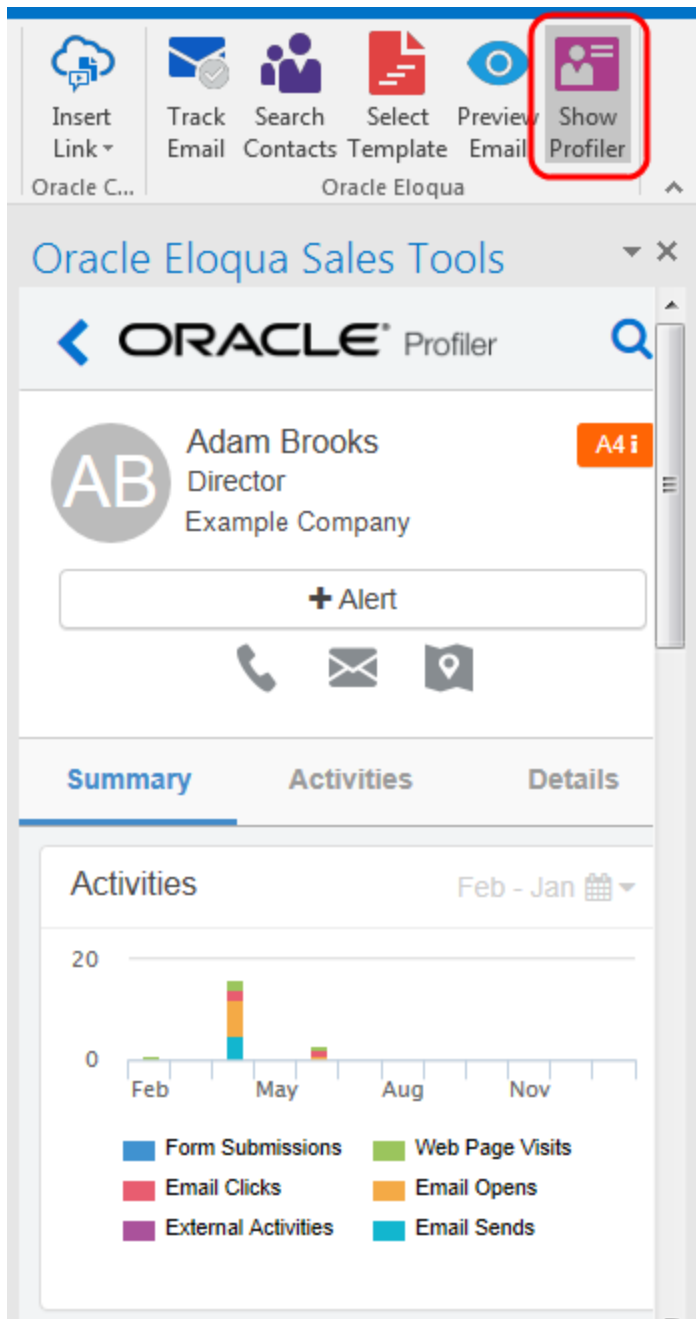
Profiler automatically searches for all contacts in your recipient list. If there is only one contact, their information is displayed. If you are launching Profiler from an email without any recipients listed, the search contacts screen opens to help you quickly find the contact you are looking for.