



# Oracle Eloqua Sales Tools

User Guide

# Contents

---

- 1 Sales Tools ..... 5**
- 2 Profiler ..... 6**
  - 2.1 Installing Profiler ..... 9
  - 2.2 Reconfiguring Profiler ..... 12
  - 2.3 Accessing Profiler ..... 14
  - 2.4 Accessing contact records in Profiler ..... 16
  - 2.5 Viewing data in Profiler ..... 21
    - 2.5.1 Summary ..... 23
    - 2.5.2 Activities ..... 25
    - 2.5.3 Details ..... 25
    - 2.5.4 Extensions ..... 28
  - 2.6 Adjusting the lead score model ..... 28
  - 2.7 Setting up activity notifications ..... 29
  - 2.8 Viewing web alerts ..... 31
  - 2.9 Accessing LinkedIn Sales Navigator ..... 34
  - 2.10 Profiler integration ..... 35
    - 2.10.1 Adding a Profiler link to Oracle Sales Cloud ..... 36
    - 2.10.2 Embedding Profiler in CRM onDemand ..... 38
    - 2.10.3 Embedding Profiler in Microsoft Dynamics 2013 ..... 41
    - 2.10.4 Embedding Profiler in Microsoft Dynamics 2016 ..... 45
    - 2.10.5 Embedding Profiler in Salesforce ..... 49
    - 2.10.6 Embedding Profiler in OKTA with SSO ..... 57
- 3 Engage ..... 61**
  - 3.0.1 What's in it for the marketing side of the house? ..... 63
  - 3.1 Installing Engage ..... 64

---

3.2 Accessing Engage .....	67
3.3 Reconfiguring Engage .....	69
3.4 Using Engage .....	72
3.4.1 Sending personal email messages .....	73
3.4.2 Sending emails created in Oracle Eloqua .....	78
3.4.3 Making a template available in Engage .....	91
3.4.4 Creating an email signature .....	93
3.4.5 Adding hyperlinks to Engage emails .....	96
3.4.6 Adding images to Engage emails .....	98
3.4.7 Adding attachments to Engage emails .....	101
3.4.8 Adding field merges to Engage emails .....	103
3.4.9 Adding signatures to Engage emails .....	107
3.4.10 Previewing Engage emails .....	110
3.4.11 Modifying the sent from email address .....	112
3.5 Viewing email sent history .....	113
3.6 Engage reports .....	119
3.6.1 Engage Top Templates report .....	120
3.6.2 Engage Emails By Recipient report .....	122
3.6.3 Exporting Engage report results .....	125
3.7 Engage integration .....	126
3.7.1 Adding an Engage link to Oracle Sales Cloud .....	126
3.7.2 Embedding Engage as a tab or button in Salesforce .....	129
3.7.3 Embedding Engage in Microsoft Dynamics 2013 .....	135
3.7.4 Embedding Engage in CRM onDemand .....	138
3.7.5 Embedding Engage in OKTA with SSO .....	141
<b>4 Oracle Eloqua Sales Tools for Google Chrome .....</b>	<b>145</b>
4.1 Installing Sales Tools for Google Chrome .....	147
4.2 Accessing Sales Tools for Google Chrome .....	148

---

4.3 Matching to Oracle Eloqua contacts based on email addresses on a web page .....	150
4.4 Matching to Oracle Eloqua contacts based on a domain .....	151
4.5 Matching to Oracle Eloqua contacts based on a LinkedIn profile page .....	153
<b>5 Oracle Eloqua Sales Tools for Microsoft Outlook .....</b>	<b>155</b>
<b>6 Frequently asked questions .....</b>	<b>157</b>
<b>7 Installing Oracle Eloqua Sales Tools for Microsoft Outlook .....</b>	<b>161</b>
<b>8 Accessing Oracle Eloqua Sales Tools for Microsoft Outlook .....</b>	<b>165</b>
<b>9 Sending a tracked email using Oracle Eloqua Sales Tools for Microsoft Outlook .....</b>	<b>167</b>
<b>10 Sent email metrics .....</b>	<b>173</b>
<b>11 Validation issues in Oracle Eloqua Sales Tools for Microsoft Outlook .....</b>	<b>174</b>
<b>12 Accessing Profiler in Oracle Eloqua Sales Tools for Microsoft Outlook .....</b>	<b>175</b>
<b>13 Sales prioritization views .....</b>	<b>177</b>
13.1 Configuring sales prioritization views in Salesforce.com .....	177
13.1.1 Configuration .....	178

# 1 Sales Tools

Oracle Eloqua's Sales Tools extend Eloqua's functionality to support the sales effort, like Oracle Eloqua supports the marketing effort. Engage helps you create consistent on-brand emails and Profiler provides an at-a-glance summary of each contact's activities over the last months.

[Oracle Eloqua Sales Tools for Google Chrome](#) is an extension which allows you to leverage Profiler and Engage features in an easy to access pop-up in your Chrome browser.

[Oracle Eloqua Sales Tools for Microsoft Outlook](#) is an add-in for Microsoft Outlook that provides easy access to both Profiler and Engage through Outlook's email composer.

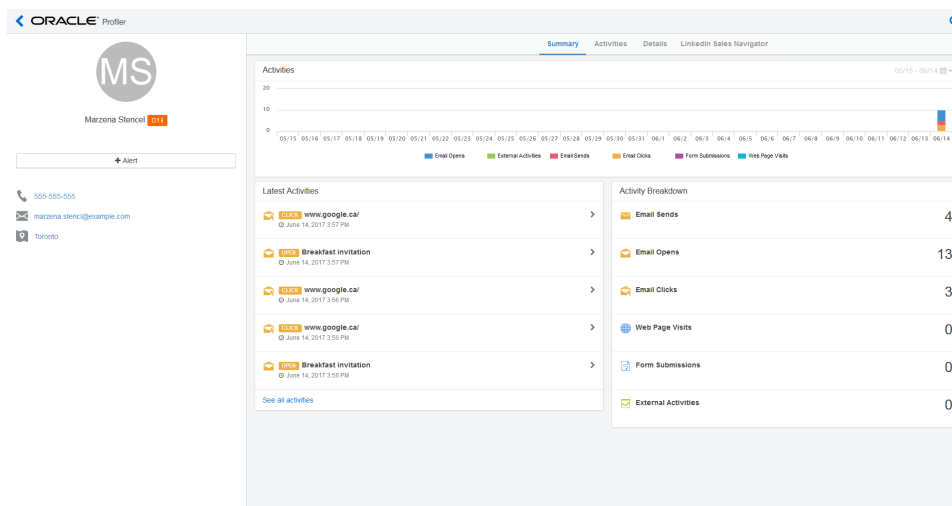
Learn more by watching these videos: [https://www.youtube.com/playlist?list=PLw7GyH-Hj8cPEFBlaiKsURliRB3SF\\_zd](https://www.youtube.com/playlist?list=PLw7GyH-Hj8cPEFBlaiKsURliRB3SF_zd)

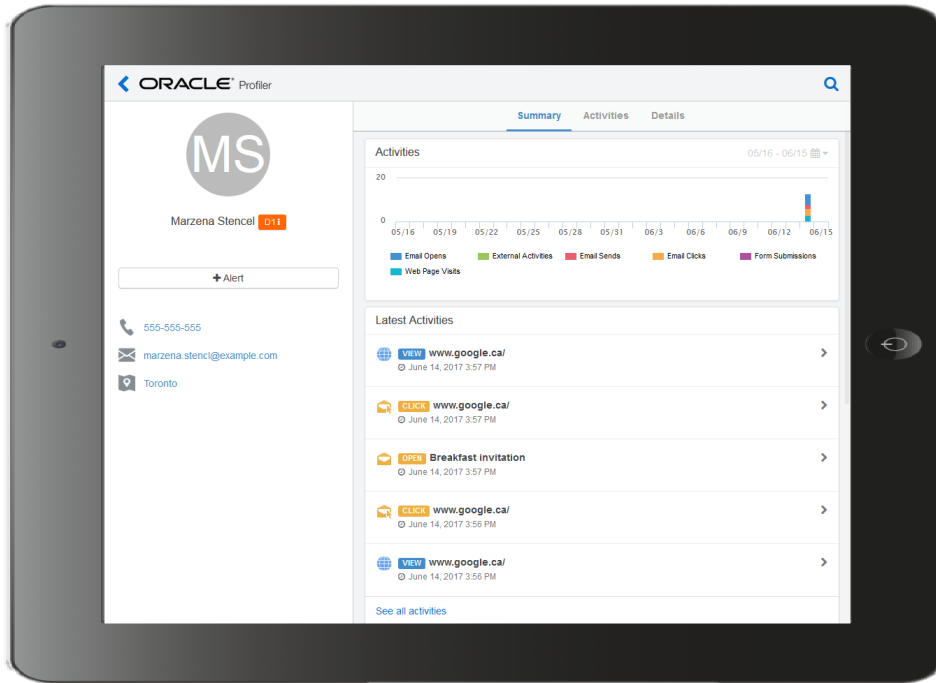
# 2 Profiler

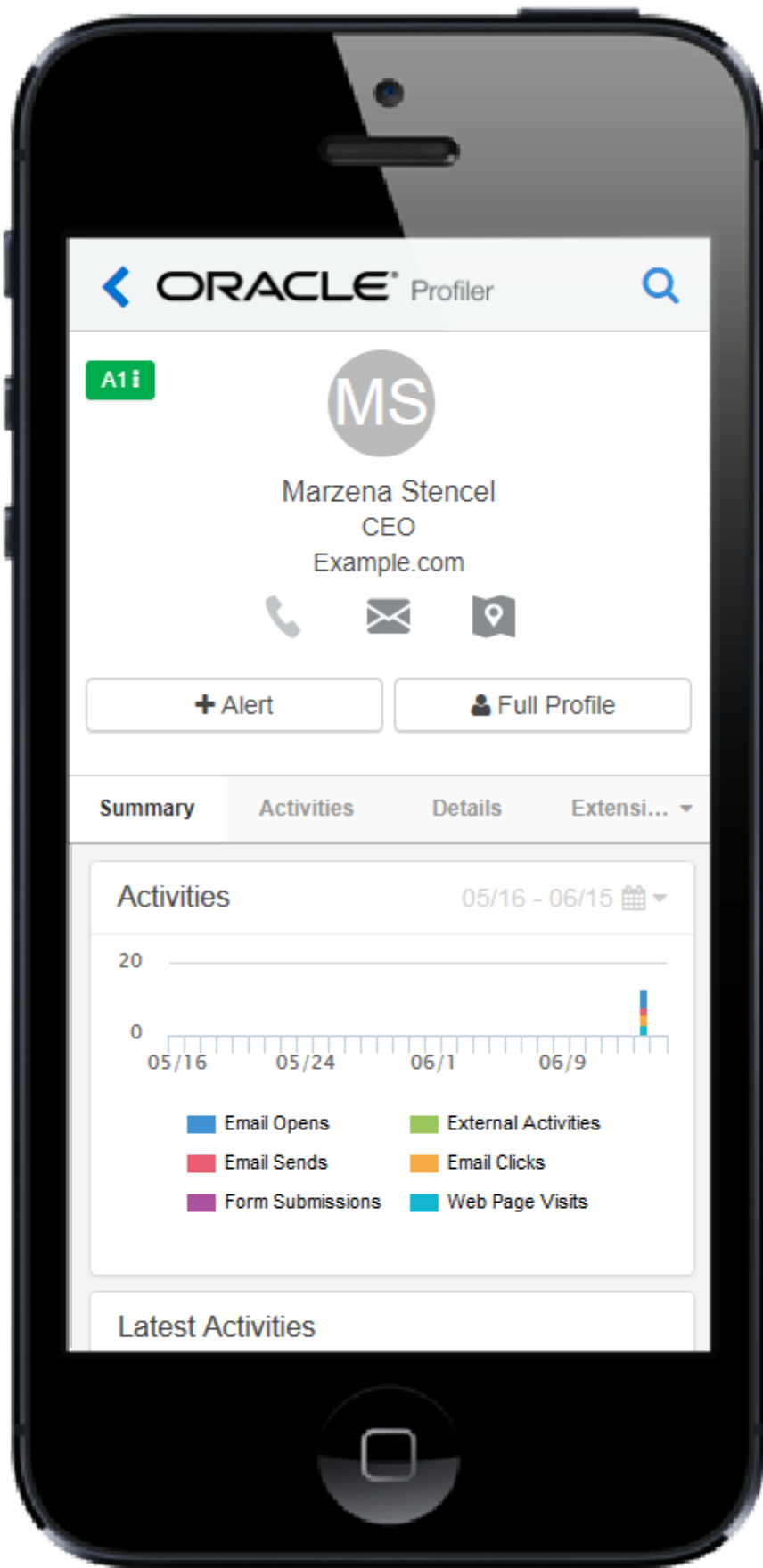
Profiler is one of Oracle Eloqua's **Sales Tools**. It presents valuable information about contacts in an easily accessible and data-rich format that can be viewed on desktop computers, tablets, and mobile devices.

With Profiler you are able to view the contact details for a potential client, their activities, their lead score value, and so on. It is designed specifically for use with iOS and Android devices, giving marketers the option to access Oracle Eloqua's Profiler functionality from their mobile devices when they are on-the-go.

See examples of Profiler's responsive design on multiple devices (desktop, tablet, and mobile phone):











Learn more by watching this video: [https://www.youtube.com/playlist?list=PLw7GyH-Hj8cPP6TQfGeDGUYv4Py9k\\_EwQ](https://www.youtube.com/playlist?list=PLw7GyH-Hj8cPP6TQfGeDGUYv4Py9k_EwQ)

 **Note:** Before you can access the responsive version of Profiler it must be installed in your Oracle Eloqua instance. Once installed, the customer administrator can customize the options that Profiler provides. Learn more about [installing and configuring Profiler](#).

## 2.1 Installing Profiler

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

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

### To install the Profiler app:

1. Follow the Profiler installation URL provided:

<https://login.eloqua.com/?ReturnUrl=Apps/Cloud/Admin/Catalog/Add/512cc250-bf75-4b64-98c2-9ce3858a18e1/D3-01-E2-AB-6C-23-36-17-7C-B1-44-49-89-11-D0-C3>

2. Log in with your Eloqua credentials, if required.
3. Click **Accept and Install** to add the app to your *Apps* list.'

4. Confirm your credentials and click **Sign In**.

5. Configure Profiler:

## Profiler Global Settings

---

**Web Alerts**  Allow creation of Web Alerts  
 Allow creation of Web Alerts by domain

**Thumbnail Previews**  Show thumbnail previews


**Search**  Allow search by first name, last name or email.

**Subscriptions**  Show subscription status

**External Activity**  Auto-Ext-Asset  
 Facebook  
 LinkedIn  
 Seminar  
 Tradeshow  
 WeChat  
 WebEx  
 Webinar  
 [YoutubeApp] Youtube Video Activity  
 无标题外部资产类型

### App Extensions

---

  LinkedIn Sales Navigator

### Social Field Mappings

---


**Facebook**  ▼


**Twitter**  ▼

**LinkedIn**  ▼

**Xing**  ▼


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

 **Note:** Clearing the **Show Subscription Status** check box will hide the subscription status from the *Details* tab in Profiler.

 **Note:** Email preview is available for 120 days after the send date.

- b. *App Extensions*: Enable the display of app extensions, such as [LinkedIn Sales Navigator](#).
- c. *Social Field Mappings*: To map the social fields that will appear in Profiler, select the field that corresponds with each social networking platform. Contacts may have more than one account in a single social networking site. The *Social Field Mappings* section allows you to specify from which account fields, personal or professional, Profiler should draw information.
- d. Click **Save**.

6. 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.



You can change these configuration settings at any time. Learn more about [reconfiguring Profiler](#).


## 2.2 Reconfiguring Profiler

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

**i Important:** The configuration process must be done by a user with Client Administrator rights.

### To reconfigure Profiler:

1. Log in to Oracle Eloqua.
2. Click **Settings** .
3. Click **Apps** in the *Platform Extensions* section.
4. Select the Profiler 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.

## Profiler Global Settings

---

**Web Alerts**  Allow creation of Web Alerts  
 Allow creation of Web Alerts by domain

**Thumbnail Previews**  Show thumbnail previews

**Search**  Allow search by first name, last name or email.

**Subscriptions**  Show subscription status

**External Activity**  Auto-Ext-Asset  
 Facebook  
 LinkedIn  
 Seminar  
 Tradeshow  
 WeChat  
 WebEx  
 Webinar  
 [YoutubeApp] Youtube Video Activity  
 无标题外部资产类型

### Social Field Mappings

---

**LinkedIn**


**Facebook**

**Twitter**


**Xing**


### App Extensions

---

 LinkedIn Sales Navigator

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

 **Note:** Clearing the **Show Subscription Status** check box will hide the subscription status from the *Details* tab in Profiler.


 **Note:** Email preview is available for 120 days after the send date.

- b. *App Extensions*: Enable the display of app extensions, such as [LinkedIn Sales Navigator](#).
- c. *Social Field Mappings*: To map the social fields that will appear in Profiler, select the field that corresponds with each social networking platform. Contacts may have more than one account in a single social networking site. The *Social Field Mappings* section allows you to specify from which account fields, personal or professional, Profiler should draw information.
- d. Click **Save**.

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

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

## 2.3 Accessing Profiler

 **Note:** Before you can access the responsive version of Profiler it must be installed in your Oracle Eloqua instance. Once installed, the customer administrator can customize the options that Profiler provides. Learn more about [installing and configuring Profiler](#).

Profiler can be accessed in the following ways:


- **Direct:** `https://login.eloqua.com/apps/salesTools/profiler`
- **Autologin:** `https://login.eloqua.com/autoLogin?LoginPrefix={Login_Prefix}&Url=/apps/salesTools/profiler`

- **SAML:** `https://login.eloqua.com/auth/saml2/autologin?LoginPrefix={Login_Prefix}&ReturnUrl=/apps/salesTools/profiler`
- **SFDC IDP:** `https://{podURL}/sso/sfdc/v1/svp.aspx?LP={Login_Prefix}&RU=/apps/salesTools/profiler`

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.

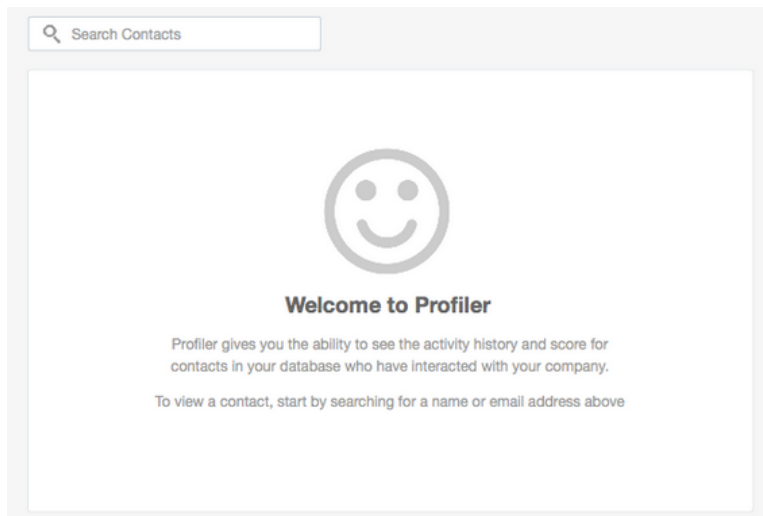
**Login Prefix** is a four-character code for the company name that you enter in the **Company** box on the login page. To add this parameter to your URL, enter `LoginPrefix={Login_Prefix}` where `{Login_Prefix}` is replaced with the four characters company name. You can obtain your company's login prefix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

You can also directly access a contact's record in Profiler using their email address. Simply add the following to the URLs above, and insert the contact's email address where needed: `/contacts?emailAddress=[enter contact's email address]`


 **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](#).


## 2.4 Accessing contact records in Profiler

Profiler allows you to view contact information on your mobile devices using a convenient and device friendly interface. When you log in to Profiler for the first time you will see a welcome message on the home page, this message informs you that you can search for contacts using a name or email address, as described below.




### To search for a contact in Profiler:


1. Select the  icon in the upper right-hand corner of the Profiler screen.


 **Note:** You can also use the *Search Contacts* field that appears on the search page when you open the app.



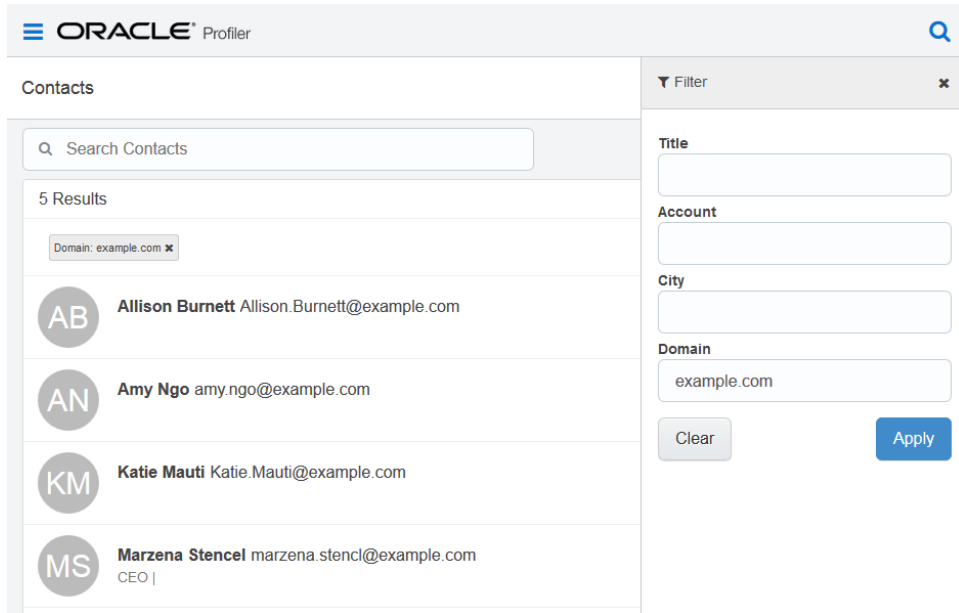
2. Type a string of letters or numbers corresponding with a contact's *First Name*, *Last Name*, or *Email Address* field values into the *Search* bar. This search is not case-sensitive. The results display a list of all contacts who have a matching contact field that *starts with* your search criteria.

 **Example:** A search for *Alex* displays users such as *Alex*, *Alexandra*, and *Alexander*.

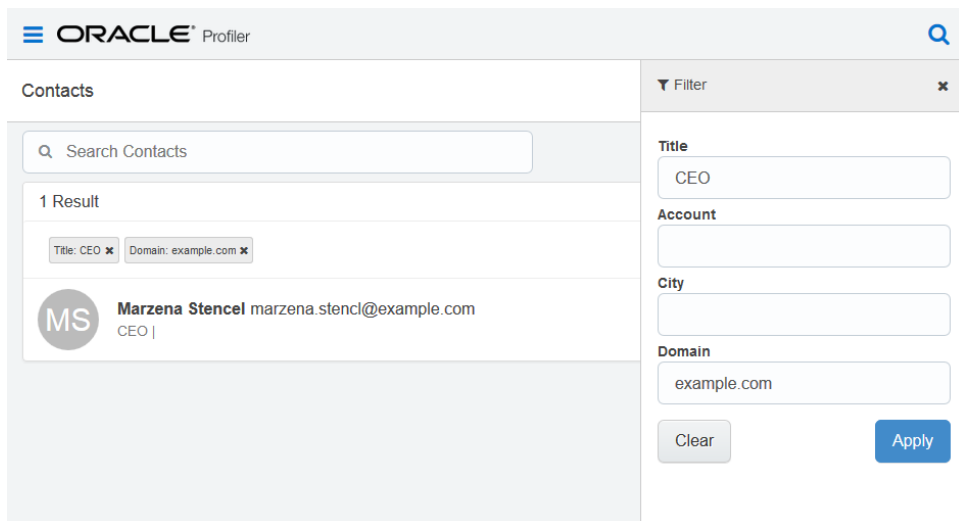
3. (Optional) Filter your contacts:
  - Click **Filter** or the filter icon  to open the filter. The filter displays on the right.
  - Enter a title, account, city, or domain to narrow your contact search, and click **Apply**.
  - Click the **X** next to a filter to remove it. To remove all filters, click **Clear**.

 **Note:** Filtering shows users that match *all* of your filtering criteria (using an **AND** operator).

Example of filtering by *example.com* domain:



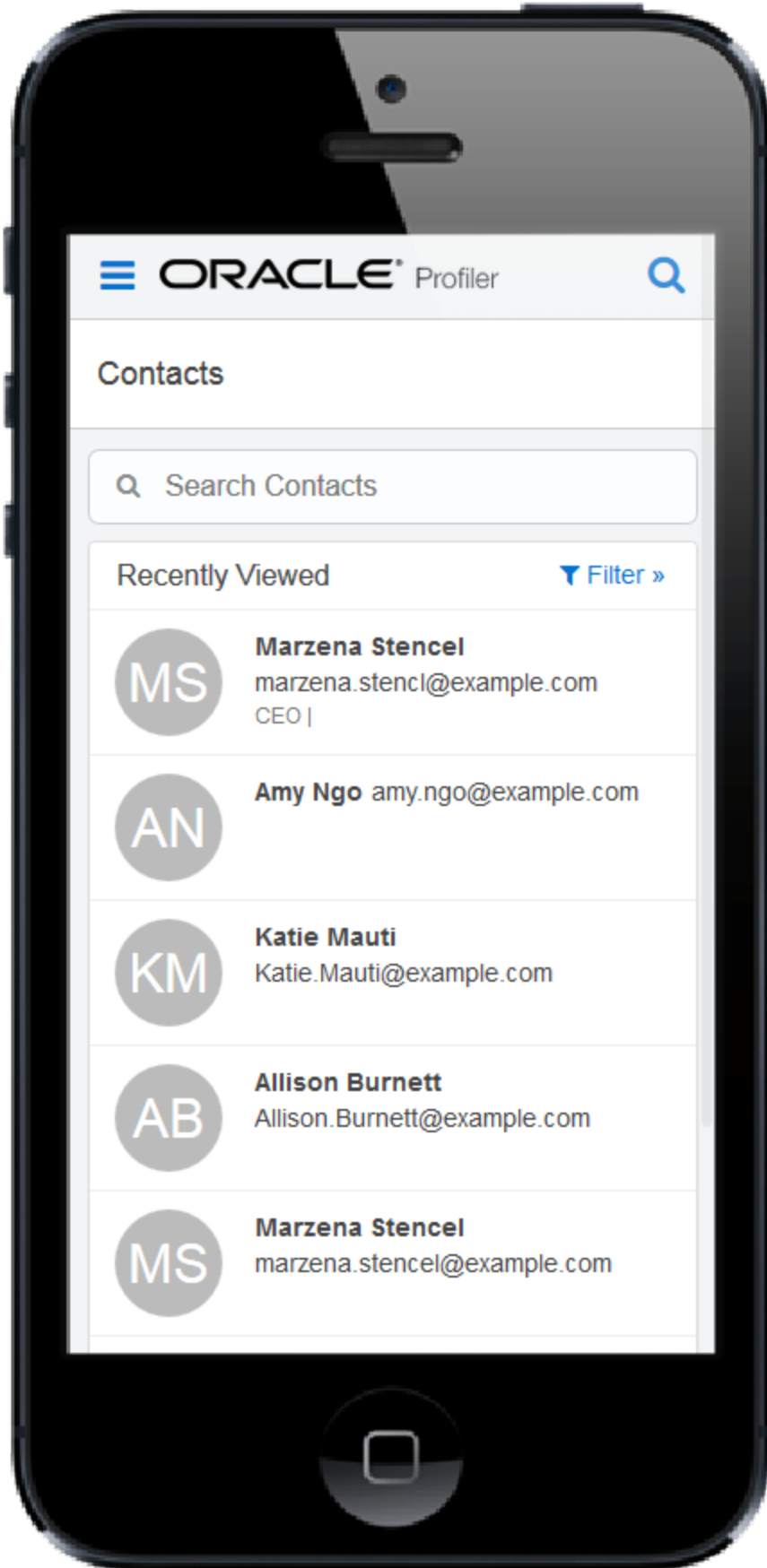
The example below shows filtering by domain of *example.com* and title of *CEO*. The results display all users who match both of these criteria. Users who have *CEO* as the title, but a different domain will not appear.



4. Select the name of the correct contact from the list. Their contact record opens displaying their details and activities. Learn more about the [information provided in Profiler](#).

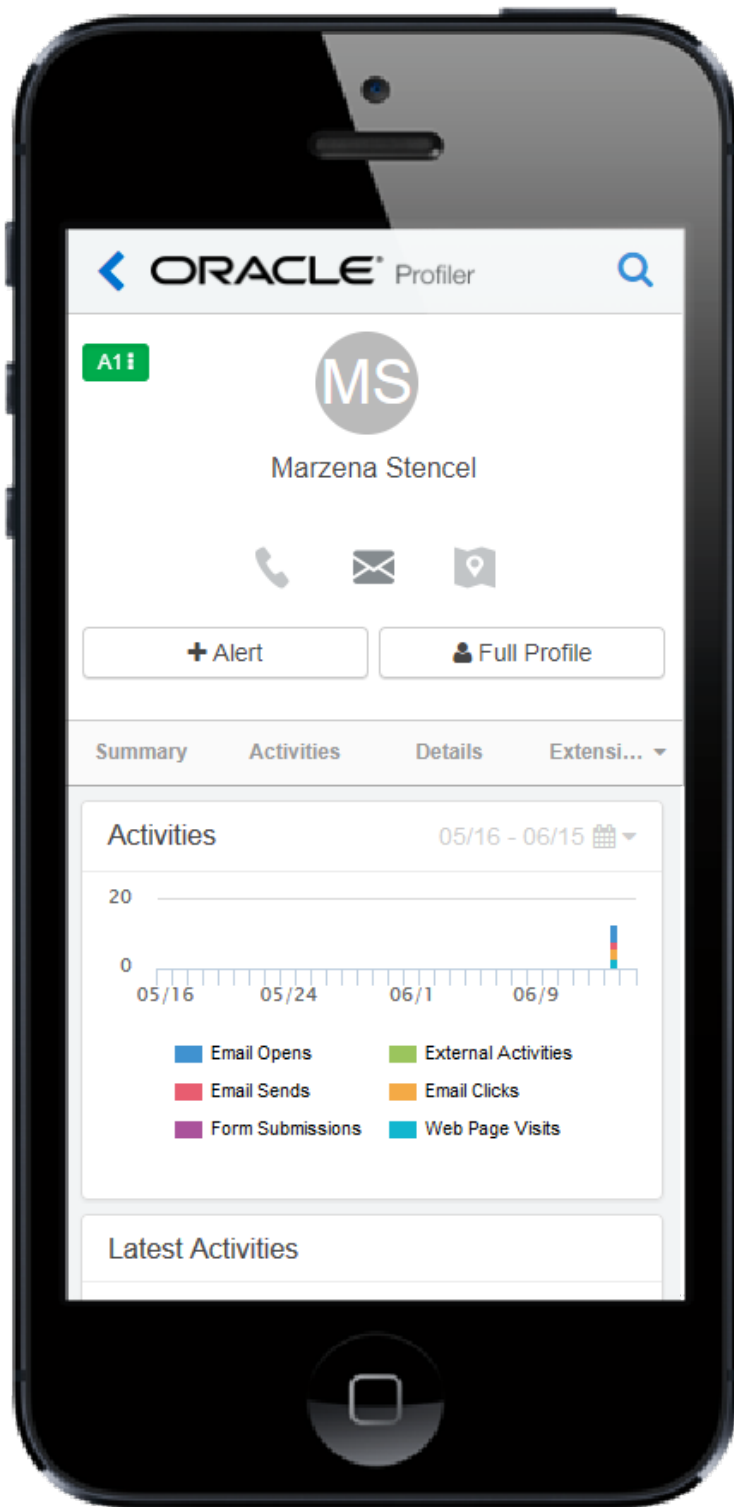
After your first visit to Profiler, a recently-viewed contacts list is displayed on the homepage. This convenient list makes it easier to locate the contacts that you may be

dealing with on a regular basis, or with whom you are attempting to establish a connection. From this recently viewed list you can select the contact's name and you are taken directly to their contact record.









## 2.5 Viewing data in Profiler

When you open a contact record in Profiler, that contact's email address is displayed along with any other fields your administrator has given you access to.



You are also provided with a number of icons that make it easier for you to reach out to a contact:

-  **Call the contact.**
-  **Reach out to the contact via email.** Clicking this icon or a contact's email address opens one of the following depending on where you are using Engage:
  - **Web Engage:** Clicking the  icon or a contact's email address in Profiler will open a *Compose* window in Engage.
  - **Oracle Eloqua Sales Tools for Microsoft Outlook:** If you access Profiler in [Oracle Eloqua Sales Tools for Microsoft Outlook](#), clicking the  icon or a contact's email address opens a new compose window in Microsoft Outlook. All emails within Outlook are tracked and will adhere to contact validation rules.
-  **Bounced back or unsubscribed.** This icon indicates that you cannot send a message to this contact, because email bounced back or the contact is globally unsubscribed.
-  **Locate the contact using Google Maps.**

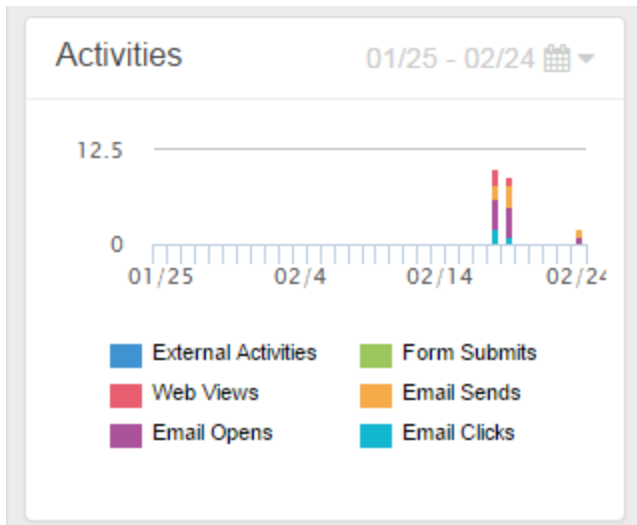
Contact data is provided under three tabs in Profiler, each of these tabs provide different useful information that is easy to understand and navigate. With the [contact record open](#) in Profiler, select the corresponding tab to access the information described below.

## 2.5.1 Summary

This tab presents the contact's activities in the following ways:

- **Activities:** This is a graphical representation of all the contact's activities within a specific date range. You can use the calendar icon in the upper right-hand corner of the graph to change the date range, select 30 days, 6 months, or 1 year as needed. The bars in the graph are broken down to categorize the types of activity that occurred, for example, how many times the contact opened or clicked an email. You can filter the results by selecting which activity types

appear in the graph. By default, all activity types are shown, tap or click the activity type label below the graph to hide the corresponding data. You can also view the full activity details for each bar on the graph, simply tap or click an individual bar and the *Activities* tab opens displaying the included activities in detail.



- **Latest Activities:** This section shows the contact's most recent activities. From here you can view a preview of each email or web page that the contact interacted with. This can give you a good idea about the contact's interests.
- **Activity Breakdown:** This section provides a breakdown of the contacts activities, these are the same categories that are represented in the activities graph. The activities are grouped based on type. You can select any of the categories and all relevant activities open in the *Activities* tab, where you can view more details.

Activities are grouped in the following way:

- **Emails Sends:** The number of emails sent to this contact.
- **Emails Opens:** The number of times emails were opened by the contact.
- **Emails Clicks:** The number of times that links in an email were clicked.
- **Web Page Visits:** Visits to tracked web pages.
- **Form Submissions:** Number of forms that were submitted by the contact.



- **External Activities:** Data captured for the contact's non-Eloqua (external) activities, such as attending a webinar, trade show, and so on.

## 2.5.2 Activities

This tab shows you all of the contact's activities, all events (email sent, email open and so on) are listed with the time and date on which they occurred. Here you can select any event and a thumbnail image will open (if the thumbnails option is enabled), or select **Preview** to see the email, form, and so on in more detail. If you want to search for specific events in the contact's record, you can do so using the search field located under the *Activities* tab. To view the activities from a specific date, select **Filter**

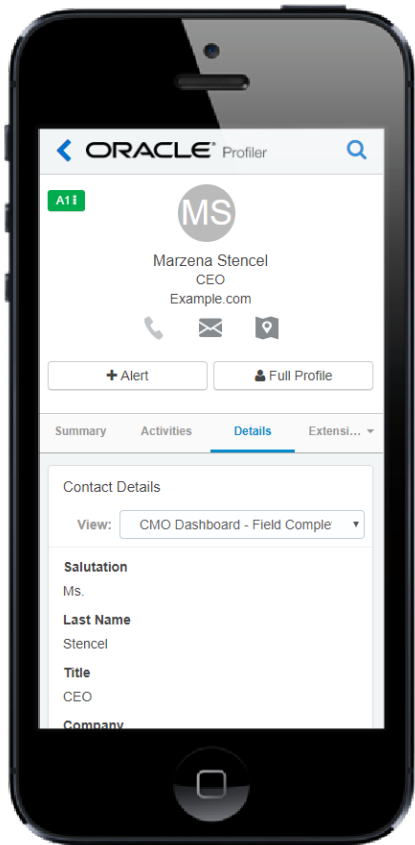


and enter a date in the *Go To Date* field, then select **Apply Filter** to filter the results.

 **Note:** Email preview is available for 120 days after the send date.

## 2.5.3 Details

This tab provides you with the contact's details. 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 messages to this contact have bounced back or the contact is globally unsubscribed, the following icon is displayed next to the email address:

**Address 2**

Not Available

**City**

Not Available

**State or Province**

Not Available

**Zip or Postal Code**

Not Available

**Title**

Mr.

**Title - Standard**

Other

**Country**

Not Available

**Email Address**

✖ ro[REDACTED]mail.com (Bounceback)

**SFDC EmailOptOut**

0



D4



Sean Eidemiller



+ Alert

Full Profile

**Contact Details**

View: Automation\_View

**Email Address**

## 2.5.4 Extensions

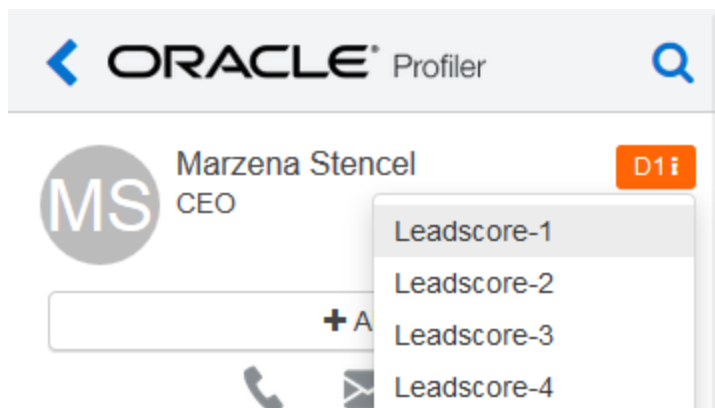
This tab provides you with access to the contact's [LinkedIn Sales Navigator](#) information and will host additional social networks in the future.

## 2.6 Adjusting the lead score model

A lead score value is displayed for each contact in Profiler. This value is based on the lead scoring models configured in your Oracle Eloqua instance. You can customize which models appear for Profiler users by adjusting the permissions settings in Oracle Eloqua. Learn more about [lead scoring](#)

**To change the lead scoring model used in Profiler:**

1. With a contact profile open, click the lead score icon to the right of the contact's name. A list opens displaying the available lead scoring models.



2. Select a new lead scoring model from the list. The new model is applied to the record and the lead score icon is updated to reflect the change.

**i Important:** When you change the lead scoring model for a contact, the selected model is saved as your default model. All subsequent profiles that you view use the selected lead scoring model.

## 2.7 Setting up activity notifications

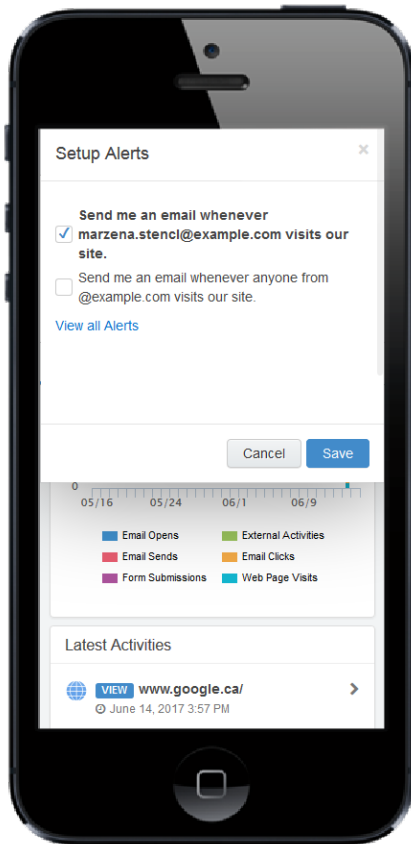
The Profiler *Web Alert* function allows you to set up alerts that will inform you each time a contact, or anyone from the same domain visits your website. As a Profiler user, you are able to configure this setting on a per-contact basis. The web alerts function is very useful as it provides you with the opportunity to follow-up with contacts after they have expressed interest in your product or materials by visiting your website.

**💡 Note:** The web alert function must be enabled for Profiler when the app is installed. If it was not enabled, you can [reconfigure the app](#) in the *Apps* area.

### To set up web alerts in Profiler:

1. [Open the profile](#) for the contact for whom you wish to set up notifications.
2. Select the **+Alert** button below the contact's name, the *Setup Alerts* window opens.

3. Select or clear the check boxes to specify in which cases you want to be notified.



4. Select **Save**, the window closes and your web alert preferences are saved for this contact. You will be sent a notification email informing you of the contacts activities according to the settings you configured above. When you select **This Contact's Activity** (in the notification email), Profiler opens to the contact's *Activities* tab where the referenced activity is displayed.

**ORACLE** eloqua

**Website Activity Notification**

Your personal notification of activity on your website. Target prospects, identify visitors, and develop sales relationships with your online visitors. Log on to Eloqua to configure your notifications to send text emails.





A visitor with the following details has visited your website:

Notification Name	Prospect Profiler: <a href="#">Marzena Stencel</a> for: <a href="#">marzena.stencel@example.com</a>
First Name:	Marzena
Last Name:	Stencel
Email Address:	<a href="#">marzena.stencel@example.com</a>
Company:	Example Co.
Pages Viewed:	5

First Name:	Marzena
Last Name:	Stencel
Email Address:	<a href="#">marzena.stencel@example.com</a>
Company:	Example Co.
Phone Number:	555-555-5555
Total Visits:	1
Total Pages:	1
Last Visit:	
Salesperson:	


[View This Contact's Activity](#)

CONNECT WITH US.    

© 2014, Oracle and/or its affiliates. All rights reserved.

## 2.8 Viewing web alerts

Using [Engage](#) and [Profiler](#), you can view a list of the web alerts you are subscribed to.

 **Note:** Web alerts are displayed if you have a Profiler license.

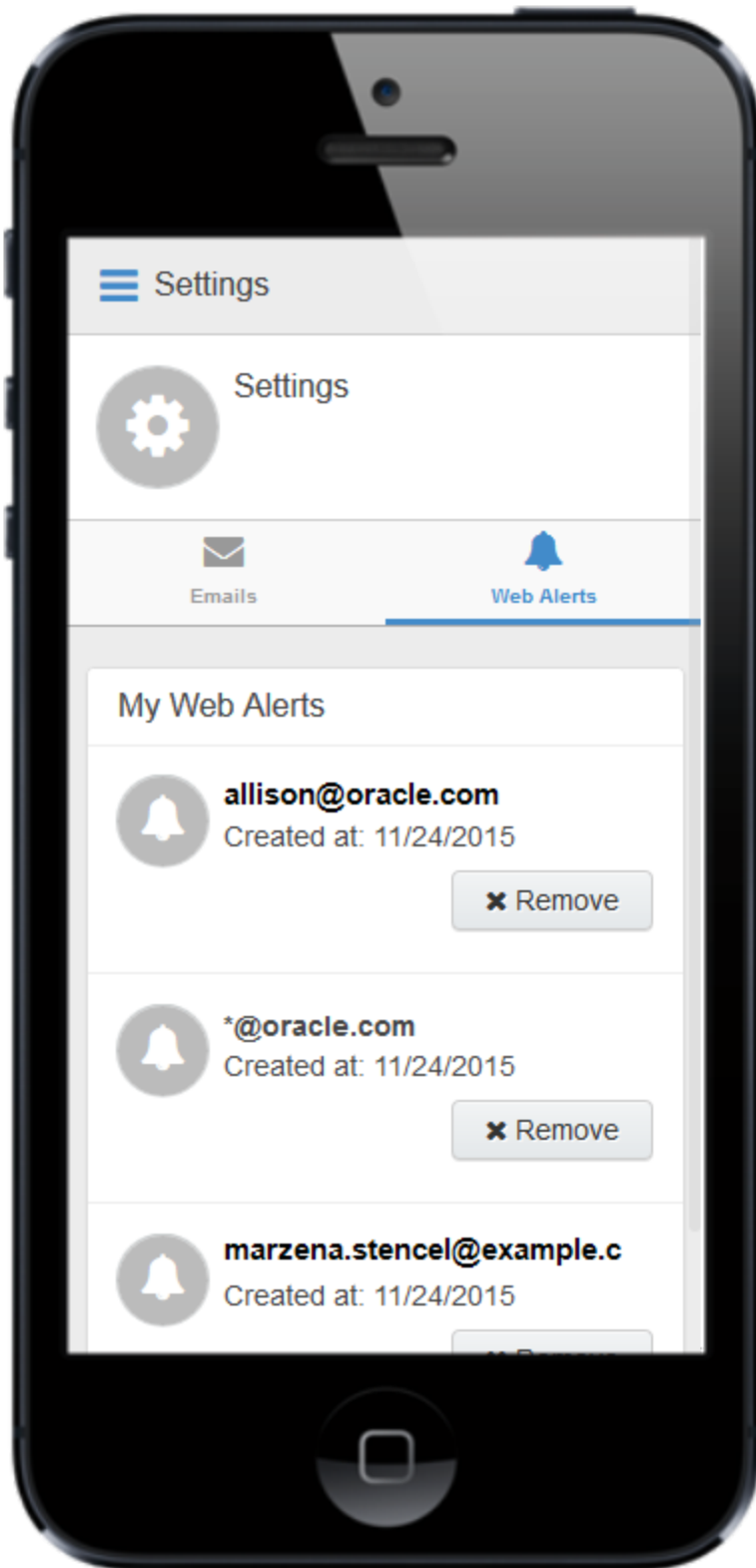
**To view web alerts:**

1. Click *Settings*





2. Select the **Web Alerts** tab.

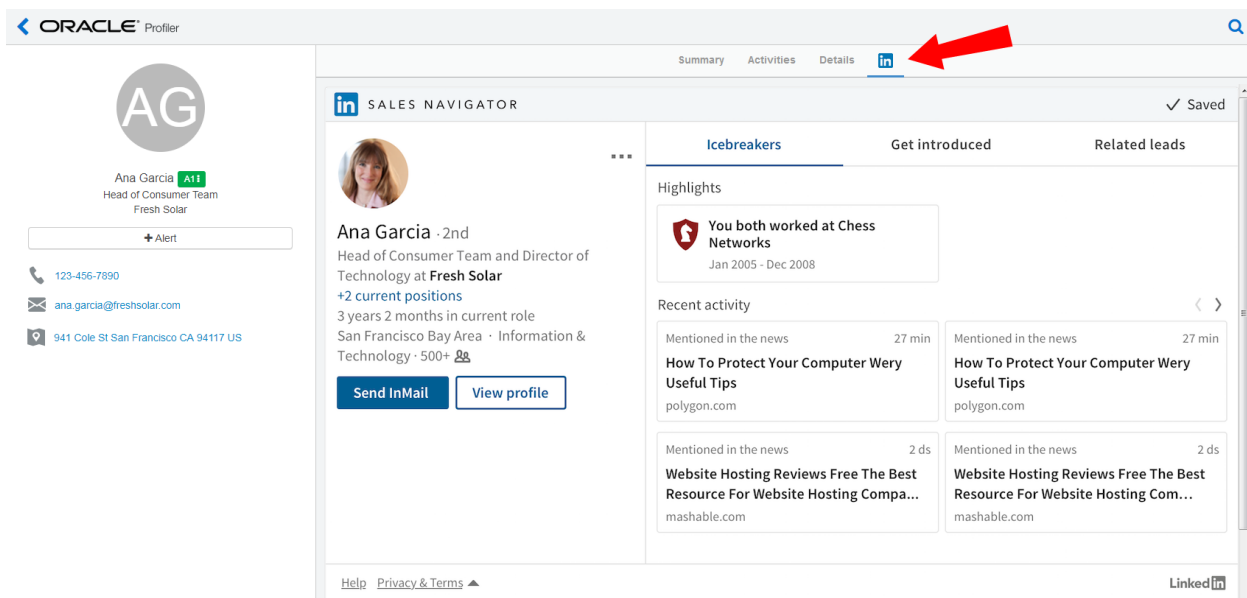


Your existing web alerts are displayed. You can remove any web alerts you no longer want to receive by clicking **Remove**.

## 2.9 Accessing LinkedIn Sales Navigator

LinkedIn Sales Navigator is a business solution offered by LinkedIn to help sales users target buyers, understand key insights, and engage with prospects. It can be accessed when viewing a contact record in Profler, next to the *Details* tab. Profler searches for a match in LinkedIn based on the Oracle Eloqua contact's first name, last name, and company name.

Visit LinkedIn's Sales Solutions site to learn more about [LinkedIn Sales Navigator](#).



The screenshot shows the Oracle Profler interface with the LinkedIn Sales Navigator integration. A red arrow points to the LinkedIn icon in the top navigation bar. The main content area displays a LinkedIn profile for Ana Garcia, including her name, title, company, and recent activity.

**Oracle Profler** | Summary | Activities | Details | **LinkedIn** (indicated by a red arrow)

**SALES NAVIGATOR** | Saved

**Ana Garcia** - 2nd  
Head of Consumer Team and Director of Technology at **Fresh Solar**  
+2 current positions  
3 years 2 months in current role  
San Francisco Bay Area · Information & Technology · 500+ [Connections](#)

[Send InMail](#) | [View profile](#)

**Highlights**

- You both worked at **Chess Networks** (Jan 2005 - Dec 2008)

**Recent activity**

- Mentioned in the news 27 min: **How To Protect Your Computer Wery Useful Tips** (polygon.com)
- Mentioned in the news 27 min: **How To Protect Your Computer Wery Useful Tips** (polygon.com)
- Mentioned in the news 2 ds: **Website Hosting Reviews Free The Best Resource For Website Hosting Compa...** (mashable.com)
- Mentioned in the news 2 ds: **Website Hosting Reviews Free The Best Resource For Website Hosting Com...** (mashable.com)

Help | Privacy & Terms | **LinkedIn**


### Prerequisites

- A *Team* or *Enterprise* LinkedIn Sales Navigator license is required. Learn more about [LinkedIn's Sales Navigator plans](#).

- The LinkedIn Sales Navigator app extension must be enabled in [Profiler Global Settings](#).
- Your own LinkedIn account for logging in via Profiler

**i Important:** To request access to this feature, please log in to [My Oracle Support](#) (<https://support.oracle.com>) and create a service request.


### To access LinkedIn Sales Navigator in Profiler:

1. Follow the installation URL provided by [My Oracle Support](#) (<https://support.oracle.com>).
2. Follow the on-screen installation instructions.
3. [Open Profiler](#).
4. Open a contact record.
5. Click the LinkedIn Sales Navigator tab . A sign in screen is displayed if you are not already logged in to LinkedIn via your LinkedIn account. If you are already logged in, the LinkedIn profile information loads automatically.

You can now access LinkedIn Sales Navigator in Profiler.

## 2.10 Profiler integration

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

 **Note:** If you already have an older version of Profiler embedded in a CRM, you must replace the login URL.


## 2.10.1 Adding a Profiler link to Oracle Sales Cloud

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

1. [Create a Profiler link](#)
2. [Add the link to a layout](#)

### Step 1: Creating a Profiler link.

#### To create a Profiler 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:** Profiler
  - **Name:** Eloqua\_Profiler
  - **Type:** Select *Link*
  - **URL Definition:** Enter one of the following URLs:

**Direct:**

```
def URL="https://login.eloqua.com/apps/salesTools/profiler?emailAddress=" + nvl  
(PrimaryEmailAddress,"")
```

#### Auto-login:

```
def URL="https://login.eloqua.com/autoLogin?LoginPrefix=<Login  
Prefix>&Url=/apps/salesTools/profiler?emailAddress=" + nvl(PrimaryEmailAddress,"")
```

#### SAML:

```
def URL="https://login.eloqua.com/auth/saml2/autologin?LoginPrefix=<Login  
Prefix>&ReturnUrl=/apps/salesTools/profiler?emailAddress=" + nvl(PrimaryEmailAddress,"")
```

**Sales Lead Contacts: Create Action or Link** Save Cancel

\* Display Label

\* Name

\* Type  Action  Link

Description

Source


Display Mode

**URL Definition**

Select alternative context Context Object



**Show Palette**

**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](https://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.

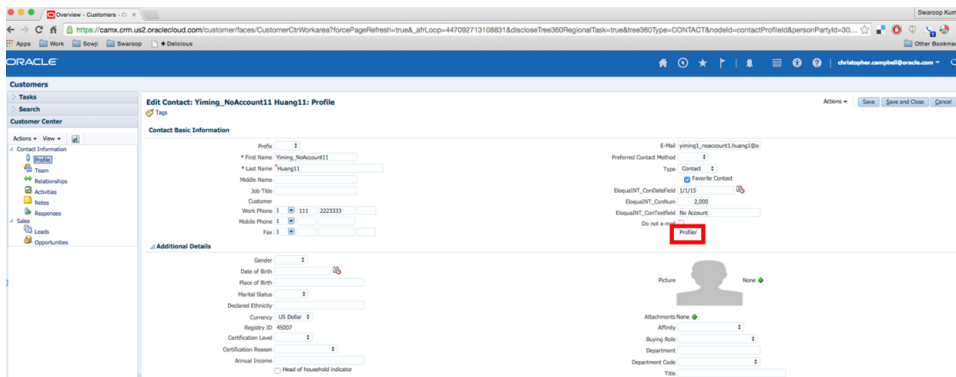
6. Click *Validate*  to validate the script.
7. Click **Save**.

## Step 2: Adding the Profiler link to layouts

### To add the Profiler link to a layout:

1. In *Application Composer* left-side menu, locate the object used in [step 1](#), 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 Profiler 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**.


When you open to a customer you will see the Profiler link.



## 2.10.2 Embedding Profiler in CRM onDemand

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

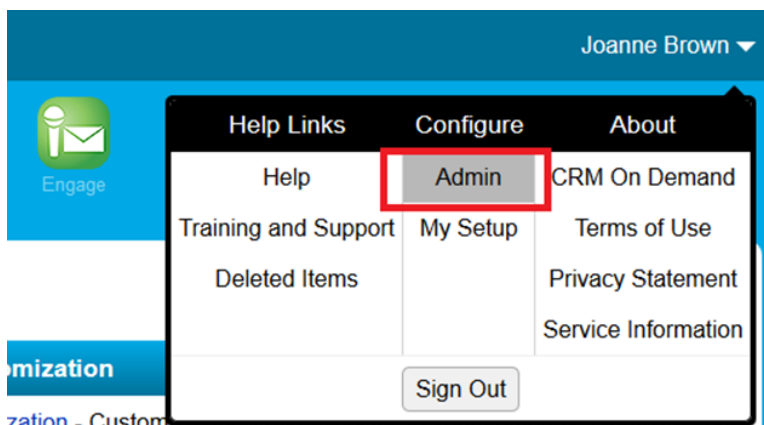
1. [Create a web applet](#)
2. [Add the web applet to a page layout](#)

 **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

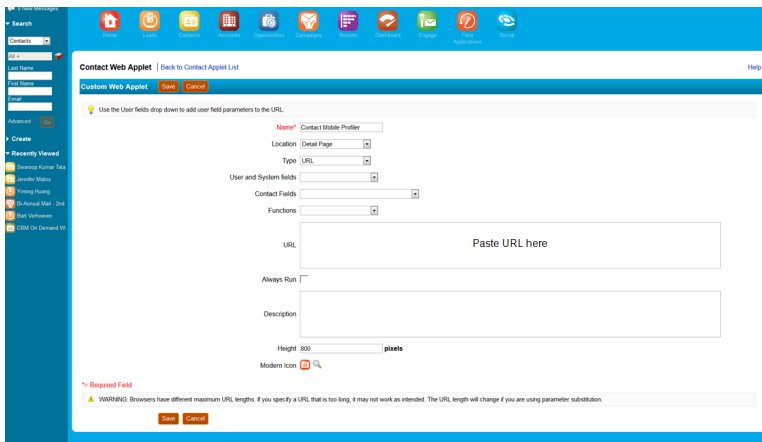
#### To create a web applet:

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 Profiler*)
- **Location:** Select *Detail Page*
- **Type:** Select *URL*
- **URL:** Enter one off the following URLs
  - **Direct:** `https://login.eloqua.com/apps/salesTools/profiler?emailAddress%3D%%Email_Address%%%`
  - **Auto-login:** `https://login.eloqua.com/autoLogin?LoginPrefix=<Login Prefix>&Url=/apps/salesTools/profiler?emailAddress%3D%%Email_Address%%%`
  - **SAML:** `https://login.eloqua.com/auth/saml2/autologin?LoginPrefix=<Login Prefix>&ReturnUrl=/apps/salesTools/profiler?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

## Embedding Profiler in Microsoft Dynamics 2016

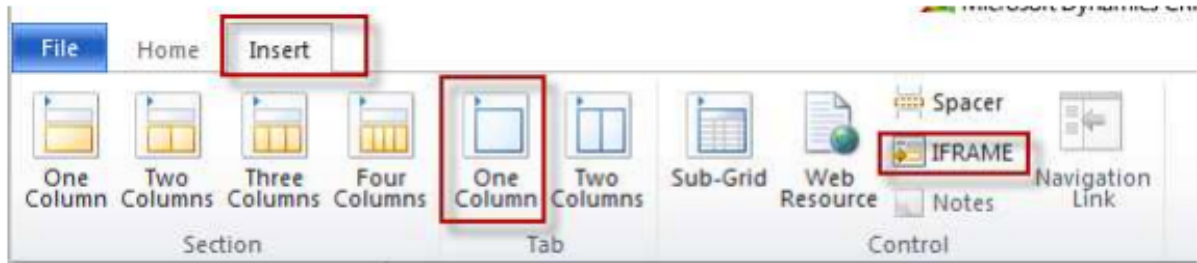
### 2.10.3 Embedding Profiler in Microsoft Dynamics 2013

Profiler can be embedded in Microsoft Dynamics.

#### To install Profiler in Dynamics:

1. Navigate to **Settings > Customization > Customizations > Customize the System**
2. Select **Entities > Contact > Forms**
3. Double-click the form you want to add Profiler 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\_Profiler
  - b. *URL*: http://about:blank
  - c. *Label*: Eloqua Profiler
  - 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/profiler?emailAddress=" +  
document.getElementById("emailaddress1").title;  
Xrm.Page.ui.controls.get("IFRAME_Profiler").setSrc(newUrl);
```

b. Auto-Login

```
var newUrl = "https://login.eloqua.com/autoLogin?LoginPrefix=<Login  
Prefix>&Url=/apps/salesTools/profiler?emailAddress="+ document.getElementById  
("emailaddress1").title;  
Xrm.Page.ui.controls.get("IFRAME_Profiler").setSrc(newUrl);
```

c. SAML SSO

```
var newUrl = "https://login.eloqua.com/auth/saml2/autologin?LoginPrefix=<Login  
Prefix>&ReturnUrl=/apps/salesTools/profiler?emailAddress="+ document.getElementById  
("emailaddress1").title;  
Xrm.Page.ui.controls.get("IFRAME_Profiler").setSrc(newUrl);
```

 **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](https://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.

**i** 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.

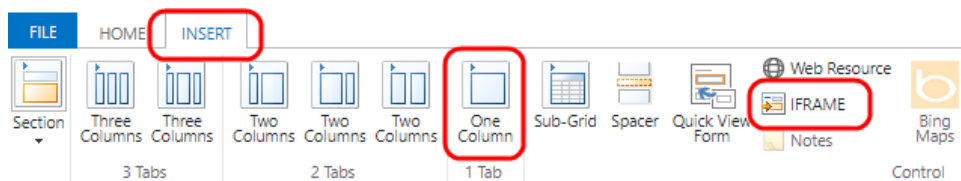
**i Important:** If the IFRAME window appears blank, in Dynamics, navigate to **Settings > Administration > System Settings > General**, and change the setting for *Use legacy form rendering* to **Yes**. Dynamics will then render the Profiler IFRAME correctly.

## 2.10.4 Embedding Profiler in Microsoft Dynamics 2016

Profiler can be embedded in Microsoft Dynamics.

### To install Profiler in Dynamics:

1. Navigate to **Menu > Settings > Customization > Customizations > Customize the System**.
2. Under *Components*, select **Entities > Contact > Forms**.
3. Click **New**, then select the form you want to add Profiler to (example, 'Main').
4. Click the **Insert** tab in the top menu.
5. Add a *One Column Tab*. Name it whatever you like by double-clicking on the new tab. Close the tab when you're finished
6. Add an IFRAME to this tab.



- a. *Name*: IFRAME\_Profiler
  - b. *URL*: http://about:blank
  - c. *Label*: Eloqua Profiler
  - d. Ensure that *Restrict cross-frame scripting* is unchecked
7. Click the **Formatting** tab. Modify the height by setting the number of rows (try 20).
  8. Click the **Dependencies** tab. Add email as a dependent field.
  9. Click **OK** to close the IFRAME window.
  10. Click the **Home** tab, then click **Form Properties** in the *Form* section.

11. Under *Form Libraries*, click **Add**, then click **New**.

- a. *Name*: new\_EPPOnLoad
- b. *Type*: Script (JScript)
- c. Click the **Text Editor** button that appears.

12. In the Text Editor, copy and paste the following string: `function loadProfiler() {`

13. 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/profiler?emailAddress=" +  
document.getElementById("emailaddress1").title;  
Xrm.Page.ui.controls.get("IFRAME_Profiler").setSrc(newUrl);
```

b. Auto-Login

```
var newUrl = "https://login.eloqua.com/autoLogin?LoginPrefix=<Login  
Prefix>&Url=/apps/salesTools/profiler?emailAddress="+ document.getElementById  
("emailaddress1").title;  
Xrm.Page.ui.controls.get("IFRAME_Profiler").setSrc(newUrl);
```


c. SAML SSO

```
var newUrl = "https://login.eloqua.com/auth/saml2/autologin?LoginPrefix=<Login  
Prefix>&ReturnUrl=/apps/salesTools/profiler?emailAddress="+ document.getElementById  
("emailaddress1").title;  
Xrm.Page.ui.controls.get("IFRAME_Profiler").setSrc(newUrl);
```

14. Be sure to close everything with a final `}`. If you've chosen Auto-Login, your code would look something like this:

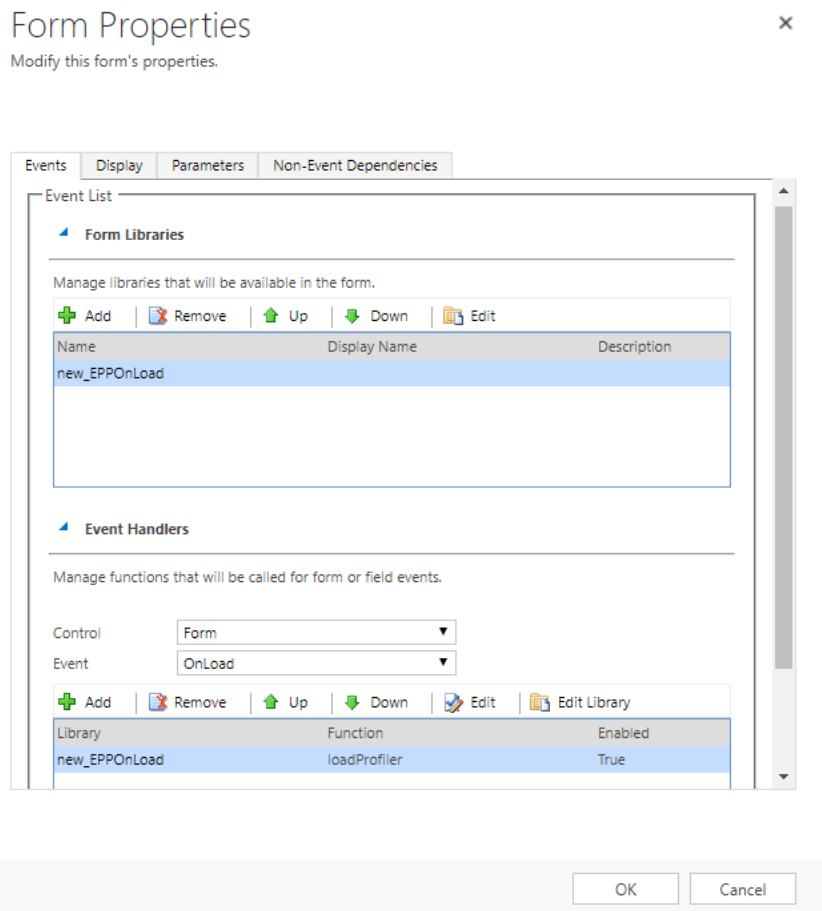
```
function loadProfiler() {  
var newUrl =
```

```
"https://login.eloqua.com/autoLogin?LoginPrefix=ELQA&Url=/apps  
/salesTools/profiler?emailAddress="+ document.getElementById  
("emailaddress1").title;  
Xrm.Page.ui.controls.get("IFRAME_Profiler").setSrc(newUrl);  
}
```

 **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](https://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 **OK** to close the Text Editor.
16. Click **Save**, then click **Publish**. Close this window.
17. Close the *Look Up Record* window.
18. Under *Event Handlers*, click **Add**.
19. Select the new function you created from the drop-down, then name it.

20. Click **OK**.



21. Click **OK** in the *Form Properties* window.

22. Click **Save**, then click **Publish** on your form.

23. Repeat for the *Leads* entity if desired.

**i Important:** If the IFRAME window appears blank, in Dynamics, navigate to **Settings > Administration > System Settings > General**, and change the setting for *Use legacy form rendering* to **Yes**. Dynamics will then render the Profiler IFRAME correctly.



## 2.10.5 Embedding Profiler in Salesforce

The users that can see Eloqua Profiler in your CRM system are dependent on the views/layouts you have set up in your CRM system and on which of those views/layouts you insert the Eloqua Profiler component.

The screenshot shows a Salesforce CRM record for a contact named Egen Chung. The Eloqua Profiler component is embedded in the record, displaying a summary of activities. The Profiler interface includes a navigation menu on the left, a main content area with a chart and activity breakdown, and a list of latest activities.

**Activity Breakdown:**

Activity Type	Count
Email Sends	20
Email Opens	90
Email Clicks	7
Web Page Visits	13
Form Submissions	1
External Activities	21

**Latest Activities:**

- Let's Get Responsive (July 3, 2015 9:59 AM)
- Let's Get Responsive (July 3, 2015 9:59 AM)
- Missed an episode? (July 3, 2015 9:59 AM)
- Missed an episode? (July 3, 2015 9:59 AM)
- Missed an episode? (July 3, 2015 9:59 AM)

**Note:** If you want to test Eloqua Profiler without making it available to your entire sales or marketing team, you should assign yourself a contact/lead view to which nobody else has access and then add Eloqua Profiler to that view.

There are three main steps you must follow when installing Profiler using Visualforce:

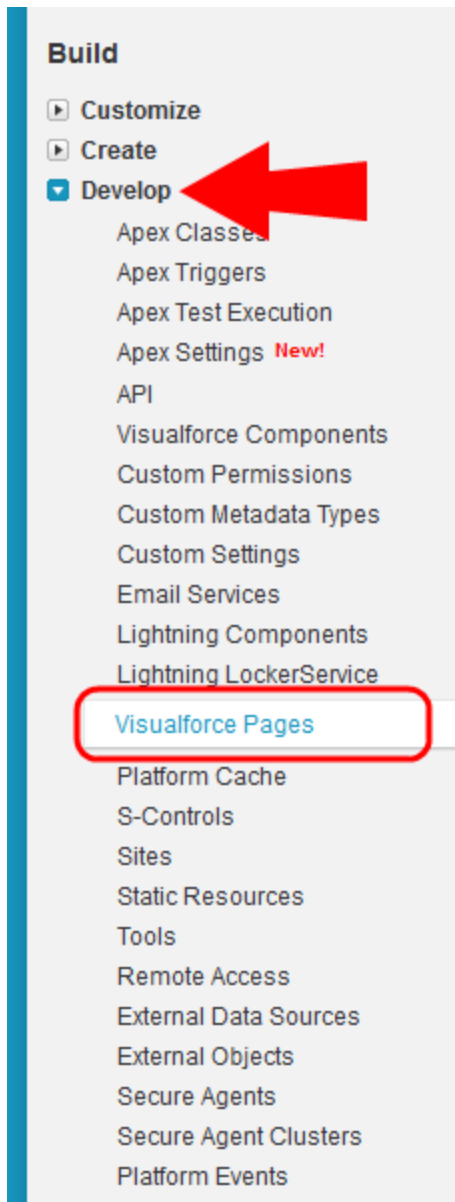
1. [Create a Visualforce page for contacts and leads](#)
2. [Adjust security for Visualforce pages](#)
3. [Add Visualforce pages to contact and lead layouts](#)

### **Step 1: Creating a Visualforce page for contacts and leads**


You will need to create two (2) Visualforce pages - one for leads and one for contacts. Then you will be editing your existing Contact and Lead views by inserting the appropriate Visualforce pages into their corresponding views. Below, we will cover the installation for a Lead view, however the steps required for a Contact view are mostly the same but for a few minor text items noted below.

#### **To create a Visualforce page:**

1. Log into your Salesforce.com account using your administrator credentials, then navigate to **Setup** in the upper right-hand corner of the screen.
2. Navigate to **Develop** (under *Build* section) > **Visualforce Pages** > **New**.



3. Provide a Label and a Name for the Visualforce page.

 **Note:** These items will only be used when managing layouts and sections and will not be visible by users simply reviewing a lead record. The name can be whatever you want but it must contain only alpha-numeric characters and must not have any spaces.

4. In the *Visualforce Markup* tab, copy and paste the code that corresponds with your choice of login options:


- **Direct:**


```
<apex:page standardController="Lead"><apex:iframe  
src="https://login.eloqua.com/apps/salesTools/profiler?emailAddress=  
{!lead.email}"/> </apex:page>
```
- **Auto-login:**

```
<apex:page standardController="Lead"><apex:iframe  
src="https://login.eloqua.com/autoLogin?LoginPrefix=  
{prefix}&Url=/apps/salesTools/profiler?emailAddress={!lead.email}"/>  
</apex:page>
```
- **SAML:**

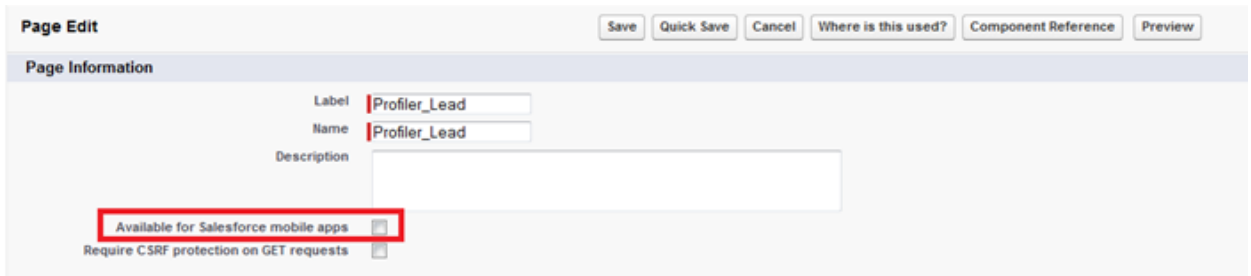
```
<apex:page standardController="Lead"><apex:iframe  
src="https://login.eloqua.com/auth/saml2/autologin?LoginPrefix=  
{prefix}&ReturnUrl=/apps/salesTools/profiler?emailAddress=  
{!lead.email}"/> </apex:page>
```
- **Salesforce IDP:**

```
<apex:page standardController="Lead"><apex:iframe  
src="https://<podURL>/sso/sfdc/v1/svp.aspx?LP=  
{prefix}&RU=/apps/salesTools/profiler?emailAddress={!lead.email}"/>  
</apex:page>
```

 **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. For your contacts Visualforce page, replace `{!lead.email}` with `{!contact.email}`.

 **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. If you wish to enable this on the salesforce1 mobile app, select the check box next to *Available for Salesforce mobile apps*.



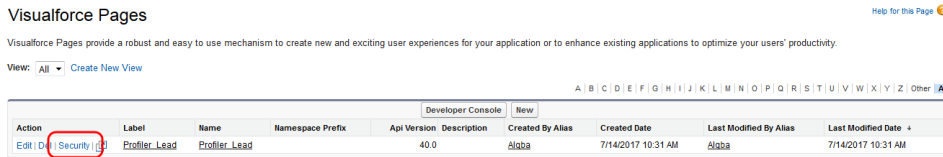
6. Click **Save**.

## Step 2: Adjusting security for Visualforce pages

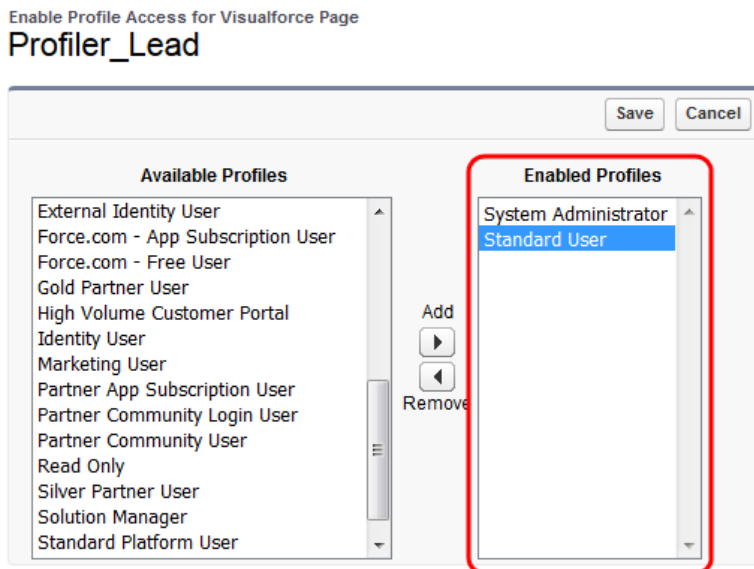
Salesforce.com has default security that prevents certain users from viewing Visualforce pages unless the security on those individual pages is customized.

**To adjust the security for a Visualforce page:**

1. Navigate to **Develop** (under *Build* section) > **Visualforce Pages**.
2. Click **Security** next to the pages you created.



3. Add user types to the *Enabled Profiles* list. These are the users that should be able to view Eloqua Profiler.




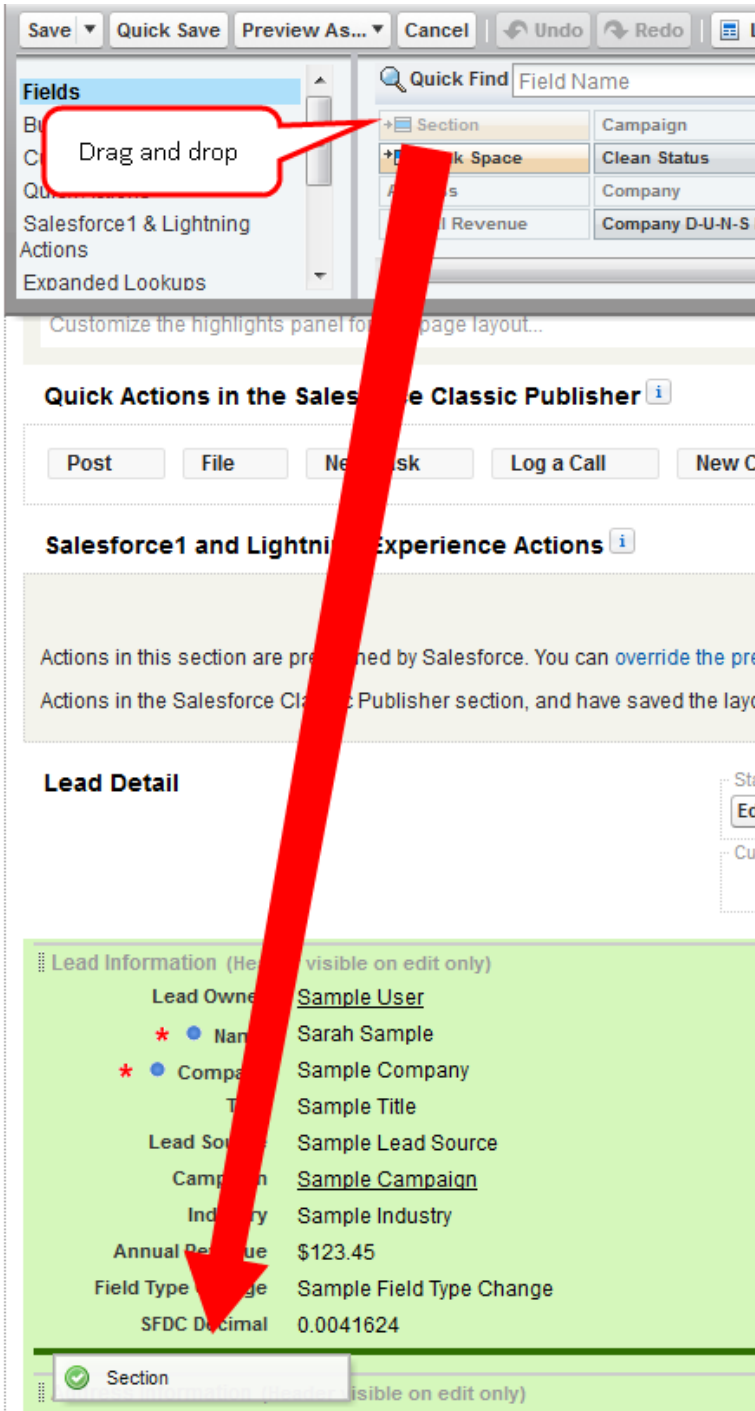
4. Click **Save**.

### Step 3: Adding Visualforce pages to contact and lead layouts

The steps below describe the procedure for adding the Leads Visualforce page to a layout. The same steps can be followed for the Visualforce Contacts page you created.


**To add a Visualforce page to layouts:**

1. Navigate to **Setup** in the upper right-hand corner of the screen.
2. Navigate to **Customize** (under *Build* section) > **Leads** > **Page Layouts**.
3. Select **Edit** next to the layout in which you would like to insert Eloqua Profiler (either the one you are testing or the one that your sales team uses to review Lead records).
4. Drag the  **Section** near the top of your screen into the area of the layout in which you would like Eloqua Profiler to be displayed.




5. Name the section. Ensure that the two check boxes are selected, and select a 1-Column Layout.



 **Note:** The section name is what will be displayed above the section within the Lead view. Ensure that the name is something that will be relevant and intuitive to your sales users.

6. Go back to the top area (the area from which you dragged and dropped the new section) and scroll down if necessary to select **Visualforce Pages** (in the area just to the left of the buttons area). Then drag the button for new Visualforce page you made into the new section you just created.
7. Hover over the top right corner of the Visualforce page (inside the Section) until a wrench icon appears. Make sure it is the one for the Visualforce page and not the entire section.
8. Click on the wrench icon. In the VisualForce Page Properties, ensure that the width is set to 100% and the height is set to 610.
9. Click **Save** to save this layout.

 **Important:** Repeat the above steps for Contacts.

10. When you return to the *Leads* tab in Salesforce and click on a lead, the new Visualforce page containing Profiler is displayed in the new section you added.

## 2.10.6 Embedding Profiler in OKTA with SSO

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

### Configuration

The high level configuration steps are as follows:

1. [Configure Profiler in OKTA with SSO](#)
2. [Accessing Eloqua Sales as OKTA apps](#)


### Step 1: Configuring Profiler in OKTA with SSO

Profiler 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 Profiler to work with OKTA so that access is seamless.

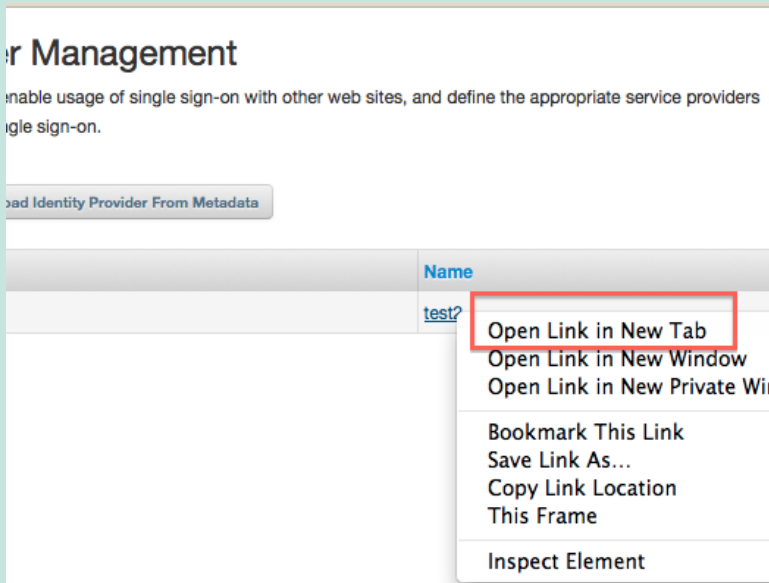
### To configure SSO with OKTA into Profiler:

1. Enter the following URLs:

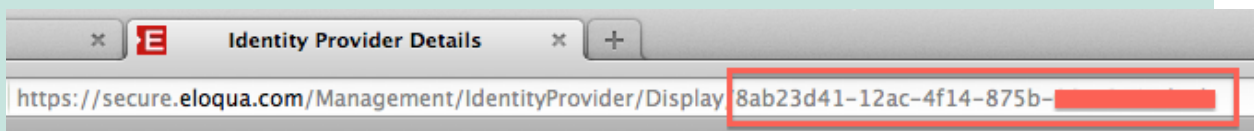
```
https://login.eloqua.com/auth/saml2/autologin?LoginPrefix=<LoginPrefix>&ReturnUrl=/apps/salesTools/profiler
```

 **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](https://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 Profiler.

## Step 2: Accessing Profiler as an OKTA App

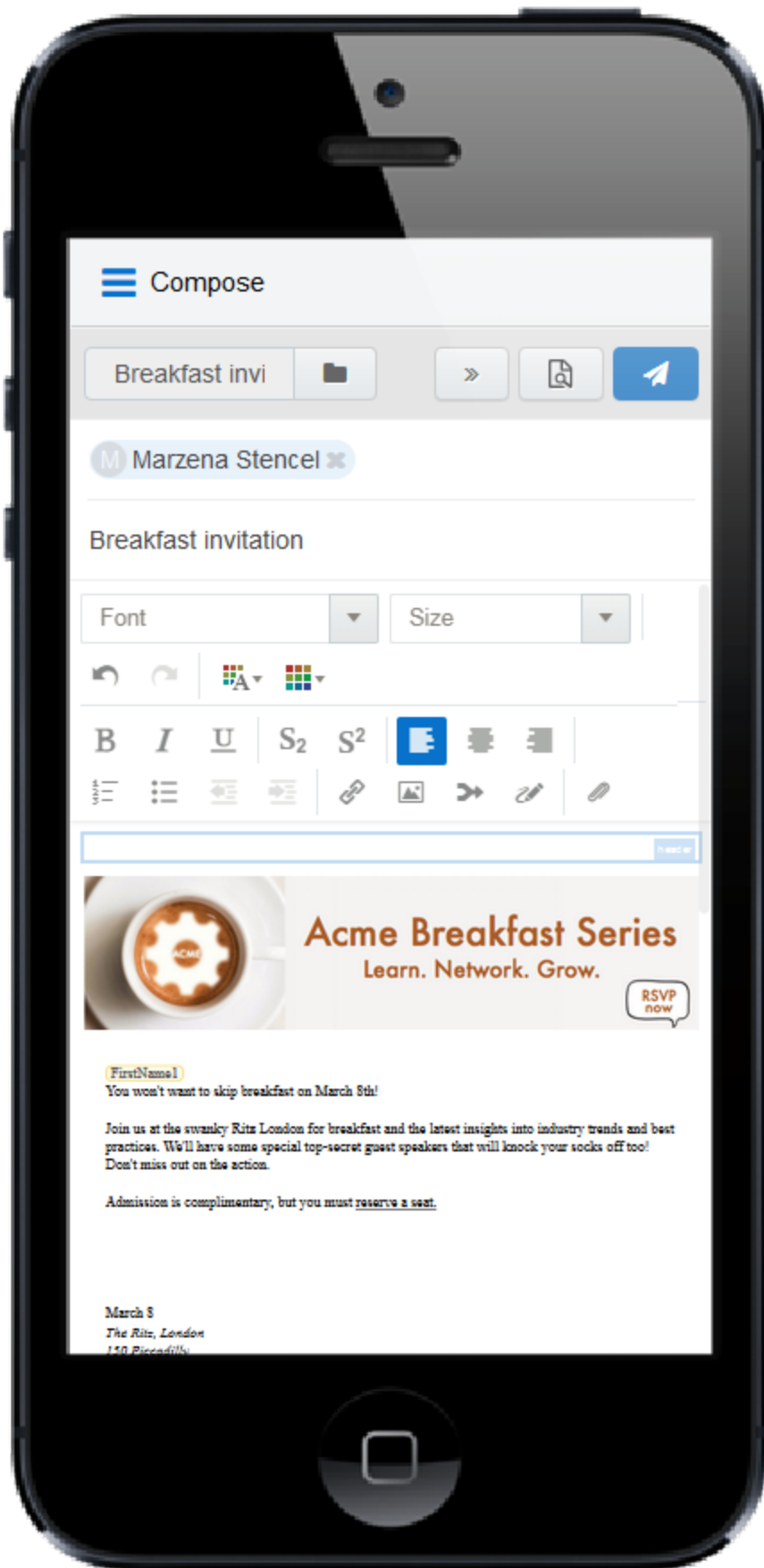
If you wish to allow users direct access to Profiler from Apps in OKTA, you can do the following.

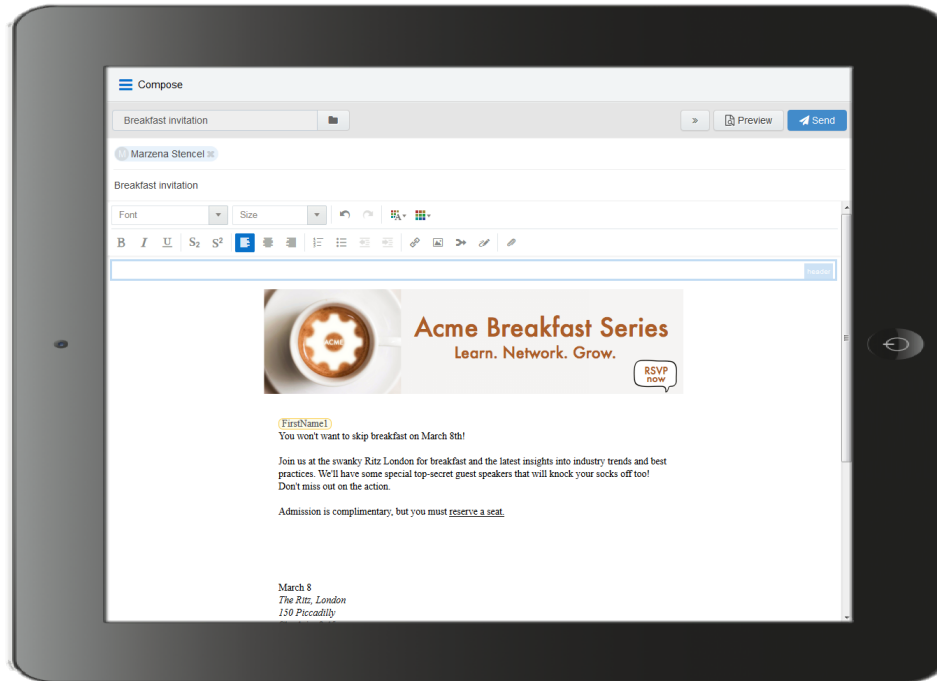
1. Repeat the SSO Configuration section above to create a new SAML2 template for Eloqua Profiler.
2. While creating the SAML2 template, add the following to the **Default Relay State** field:

**ReturnURL=%2FsalesTools%2Fprofiler**

# 3 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.





### 3.0.1 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](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](#).

## 3.1 Installing Engage

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

**i 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.

The screenshot shows the 'Engage Settings' configuration window. The settings are as follows:

- Recipients**
  - Enable recipient autocompletion
  - Restrict the maximum number of recipients to:
- Email Creation**
  - Allow use of blank templates
  - Allow creation of shared templates
- Content**
  - Allow images
  - Allow attachments
  - Enable field merges
- Text Formatting**
  - Enable font colors and font highlighting
  - Enable font and font size selection
- Template Sorting**
  - Recently Modified
  - Alphabetical

A 'Save' button is located at the bottom right of the configuration window.

- *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.

## 3.2 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?emailId=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](#).



### 3.3 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.

 **Important:** The configuration process must be done by a user with Client Administrator rights.

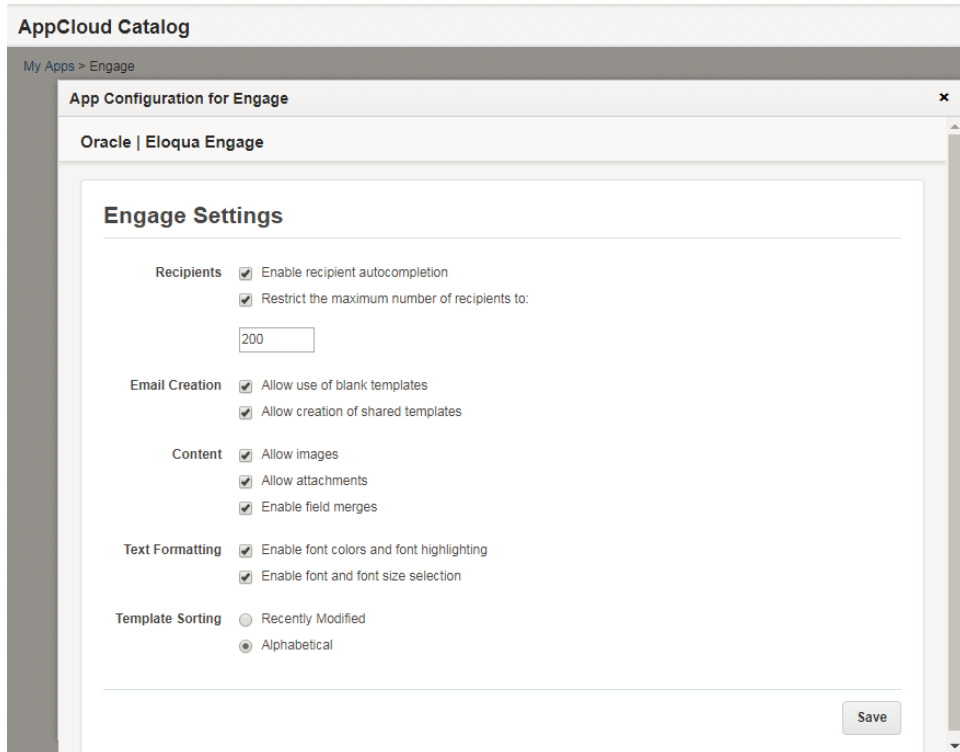
**To reconfigure Engage:**

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.

## 3.4 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.

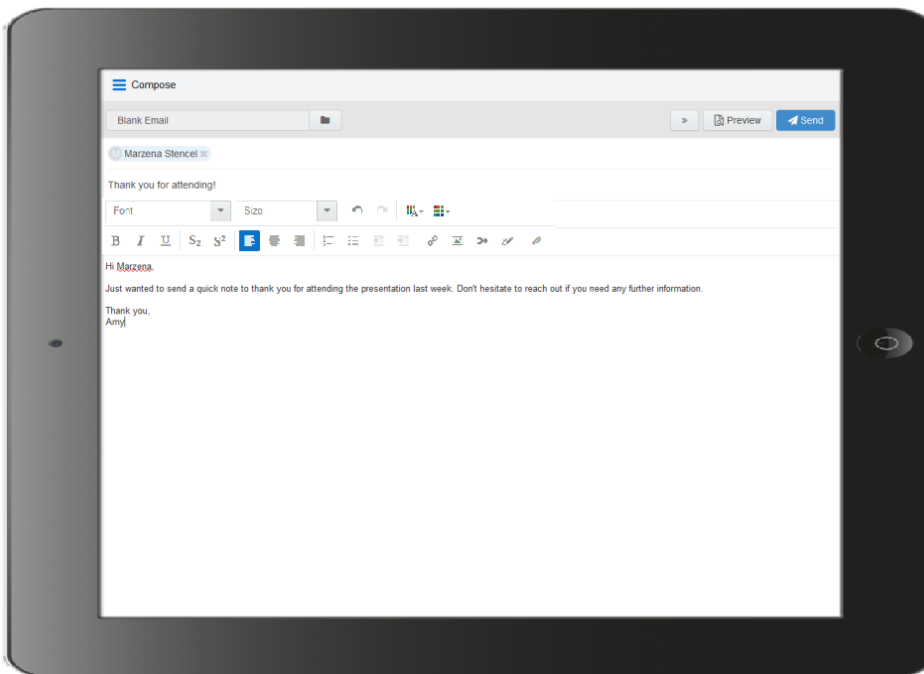


### 3.4.1 Sending personal email messages

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](#).

**i 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](#).

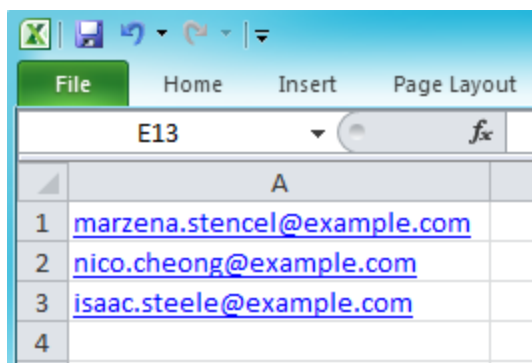
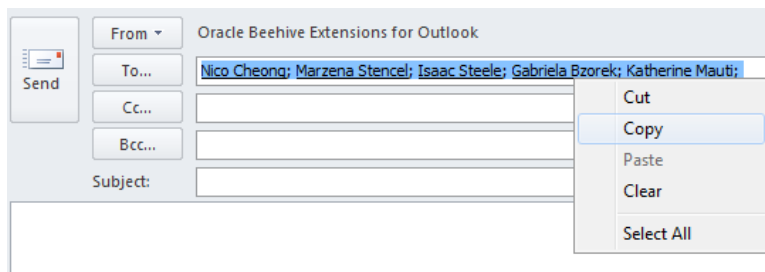


## To send a personal email using Engage:

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

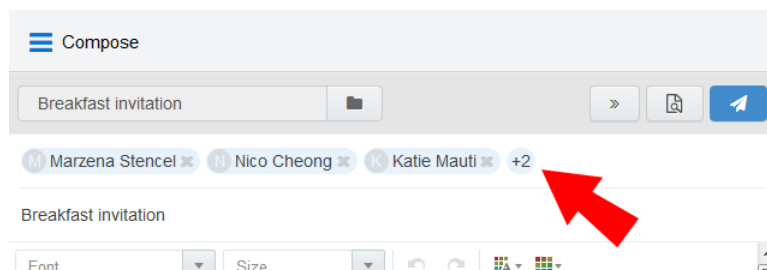
Eloqua contact, the name is displayed in blue. New email addresses, that do not match Oracle Eloqua contacts, or ones missing a field merge value, display in orange. You are prompted to save these recipients as contacts before sending the email.

**i 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.

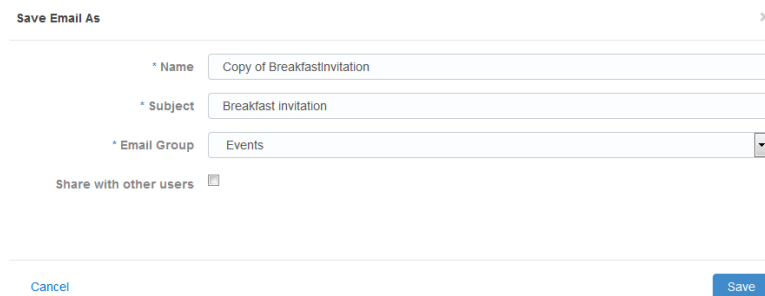
7. [Preview your email.](#)

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.



- 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).

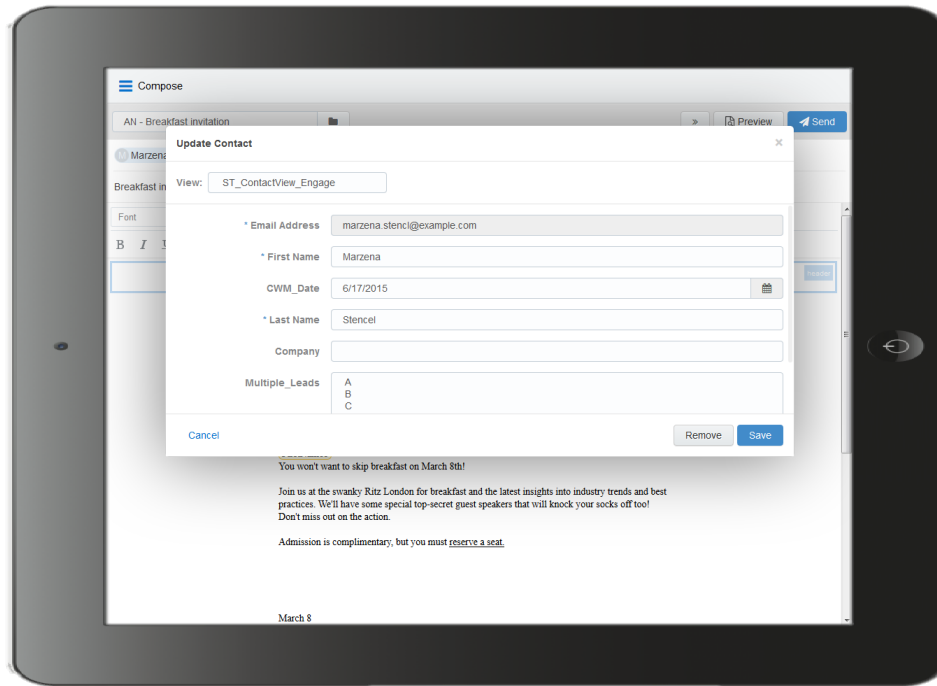
**i Important:** Field merges can cause incorrect values in email sent from Engage if the corresponding contact fields for individual contacts are blank or contain default values such as `First Name`. Best practice is to populate all fields for which you have accurate information.

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.

**i 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.

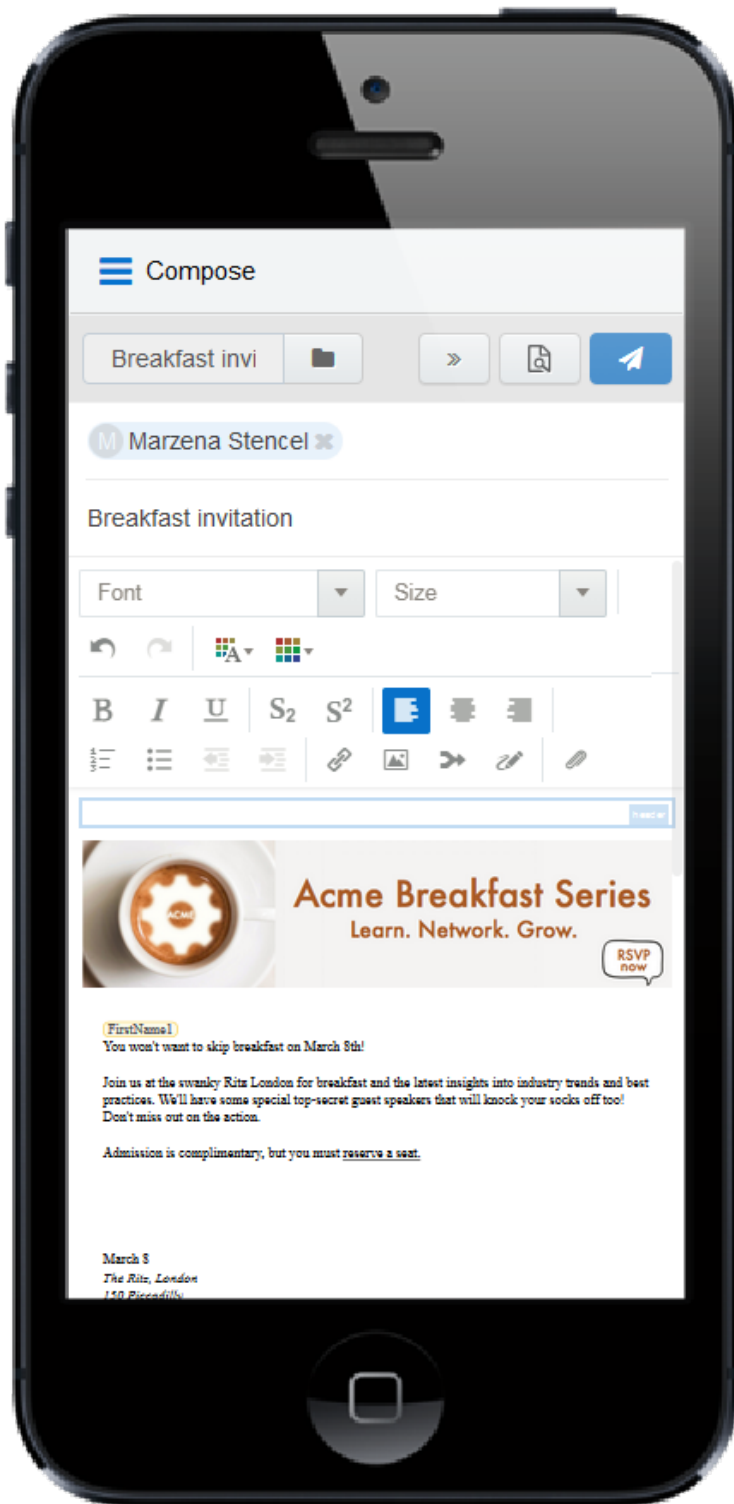


Once the email is sent, Engage displays your *Recent Emails Sent* history and send status.

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


### 3.4.2 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:

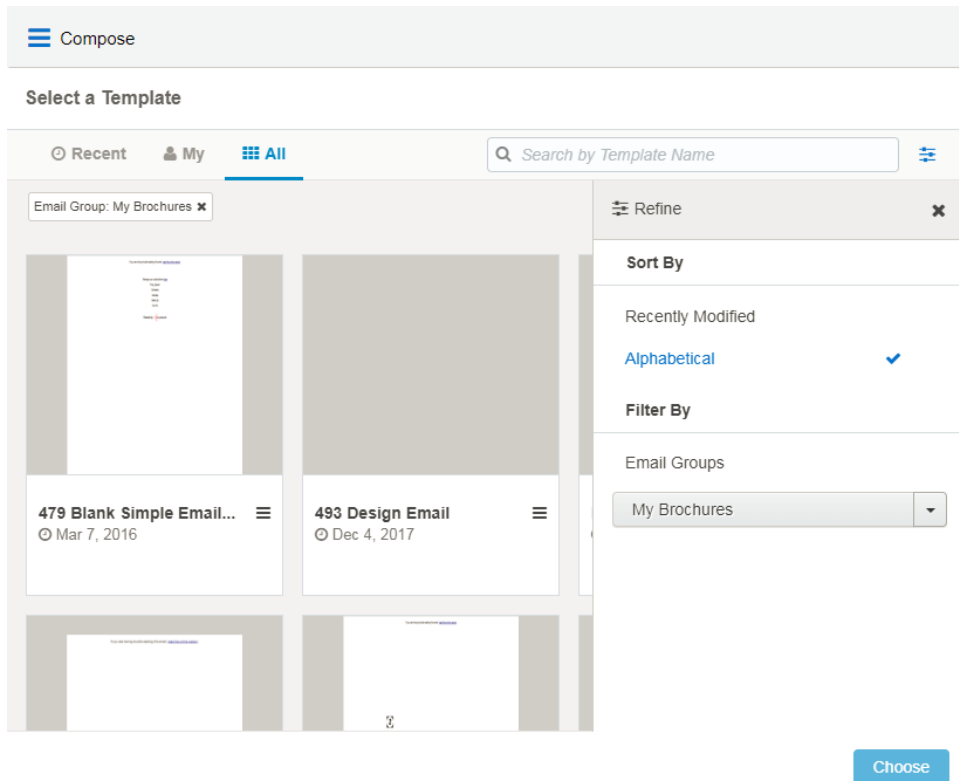
1. [Open Engage](#).
2. Click **Compose**. The *Select a Template* page is displayed.
3. Select an existing email created in Oracle Eloqua. The available Oracle Eloqua emails are displayed. Each email has a thumbnail image, file name, email subject, and date last modified. Twenty emails are displayed 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  to sort alphabetically and to filter by an email group.



Delete duplicate or unnecessary email templates by clicking the  icon and selecting **Delete**.

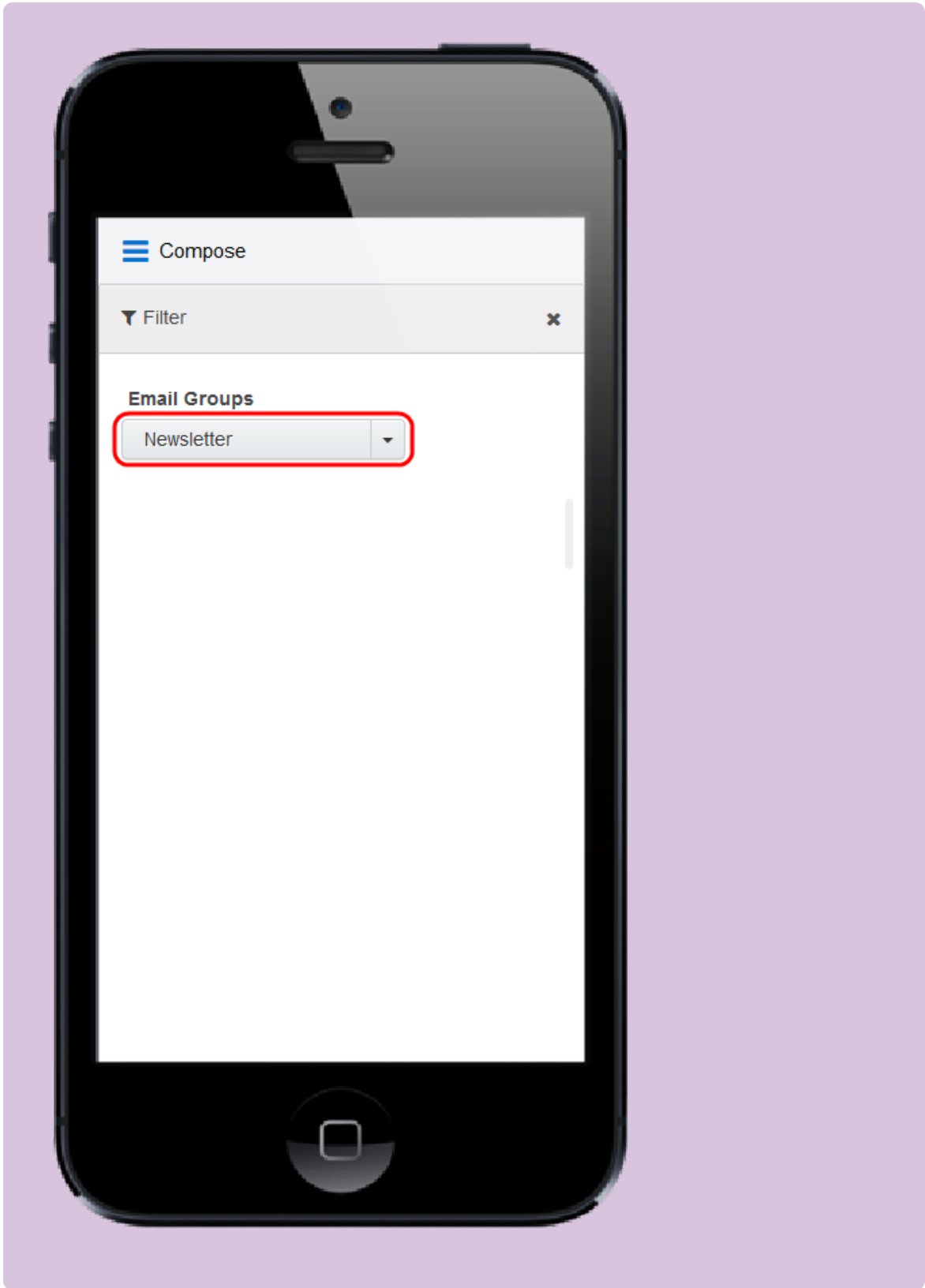
You must have appropriate asset permissions to delete email templates.

 **Tip:** You can filter emails in *My* and *All* tabs based on an email group and sort them.

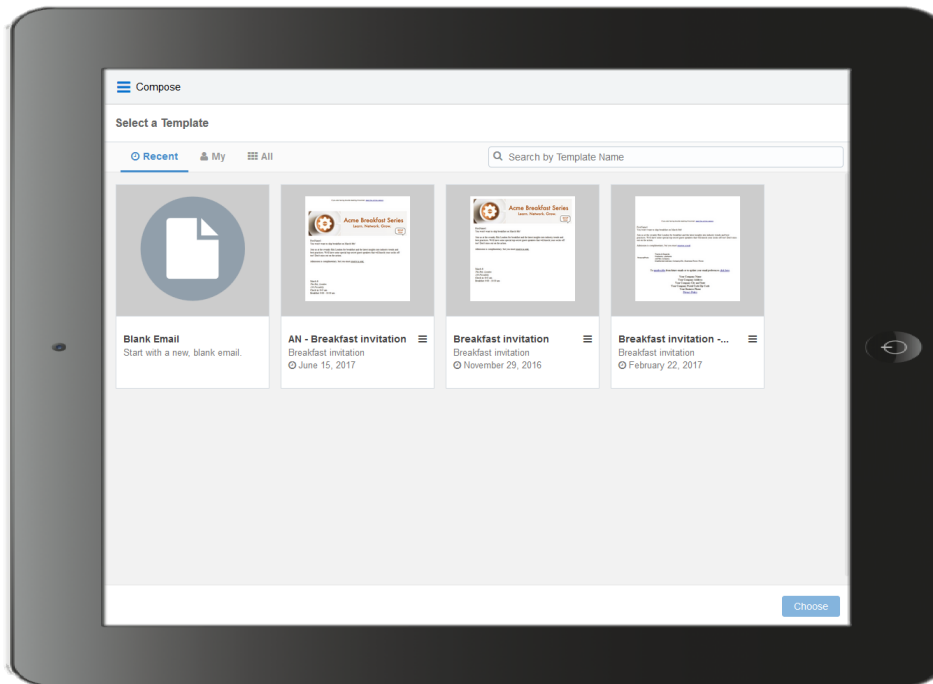
Click the refine icon  to select the desired email group or sort templates

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 dropdown or remove the email group label. Learn more about managing [email groups](#).

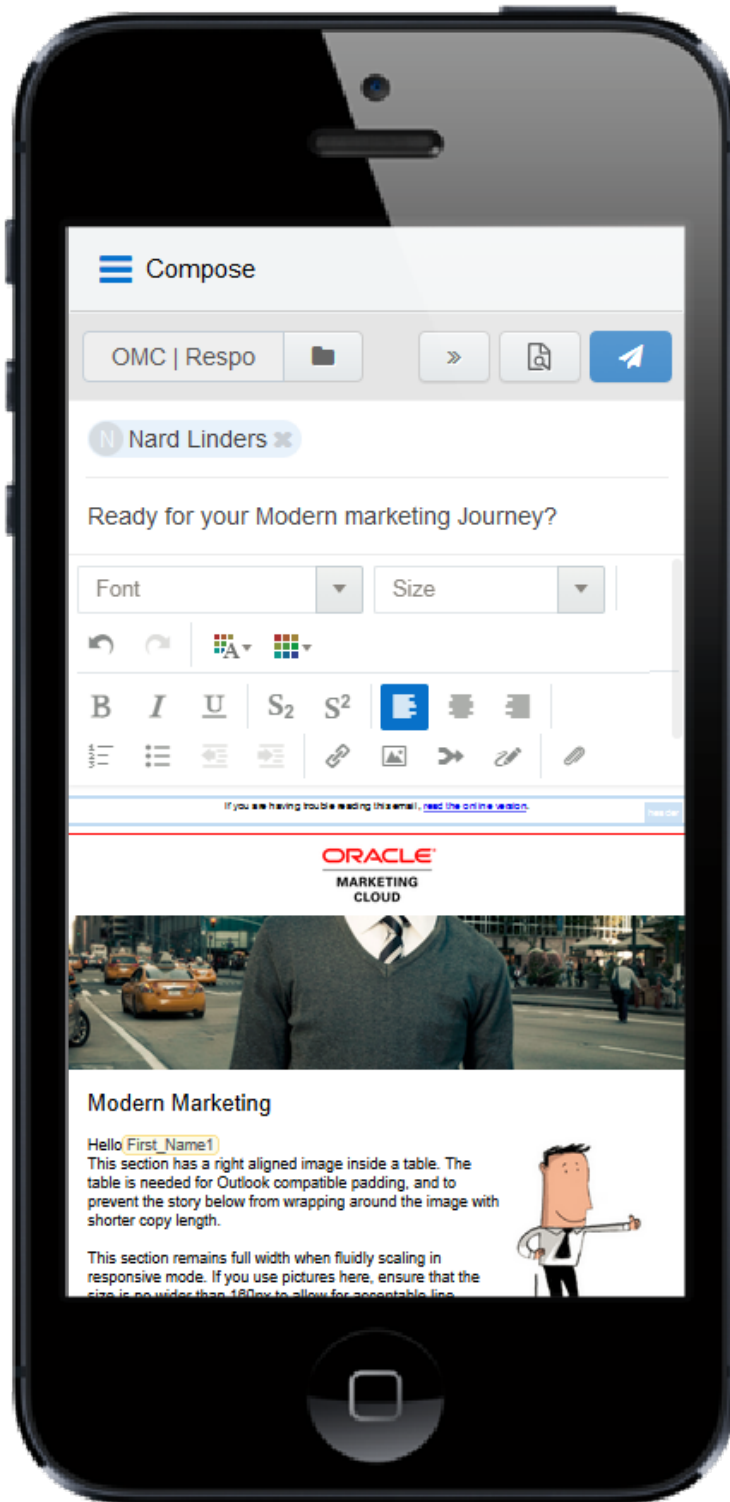




Emails must have appropriate permissions set to be available in Engage. Learn how to [make emails available in Engage](#).

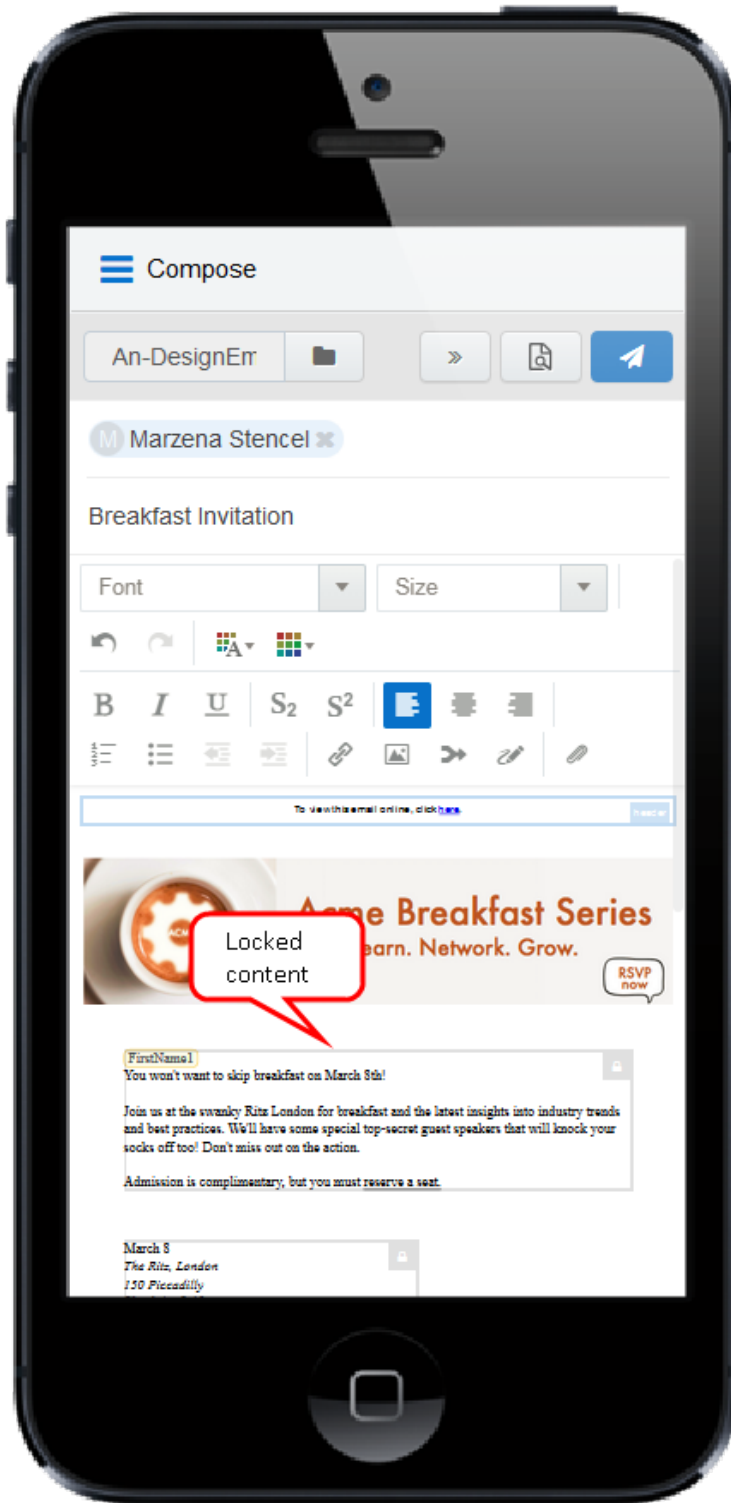


5. Select the email you want to use and click the **Select** button, or double-click the email. You can go back and select a different email by clicking the folder icon again. Selecting a different email overrides any change you have made.
6. Edit your email content. Where permitted, you can edit email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

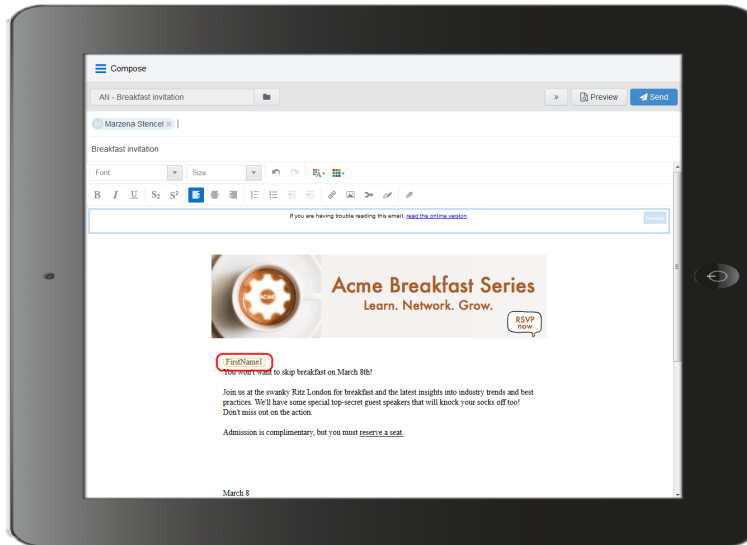


- Content you can change is outlined in green and marked with an edit icon. Content you cannot change is locked. Locked content is outlined in gray, is marked with a lock icon, and is locked

based on the configuration of [email groups](#), [email templates](#), and [Engage settings](#).

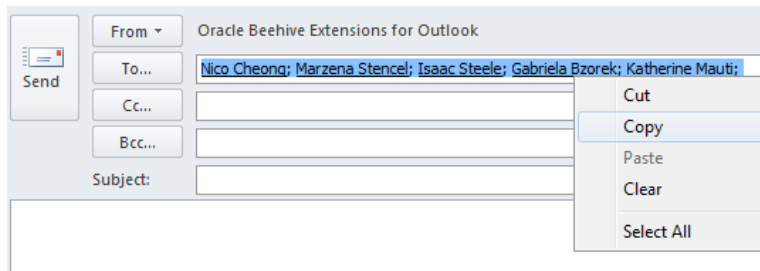


- Field merges can be easily identified. They are highlighted in yellow throughout your email, including the *Subject* line. If needed, you can delete merged fields from the *Subject* line. If field merges in the body of the email template are protected, you cannot edit them. The values of these fields 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.



	A
1	<a href="mailto:marzena.stencel@example.com">marzena.stencel@example.com</a>
2	<a href="mailto:nico.cheong@example.com">nico.cheong@example.com</a>
3	<a href="mailto:isaac.steele@example.com">isaac.steele@example.com</a>
4	

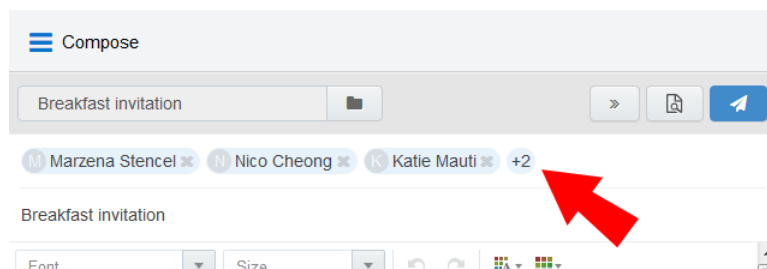
- As you enter an email recipient's name or email address, Engage searches your Oracle Eloqua contacts (if this permissions is enabled in Engage Global Settings). If you enter an existing Oracle Eloqua contact, the name is displayed in blue. New email addresses, that do not match Oracle Eloqua contacts,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

**i 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.





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.

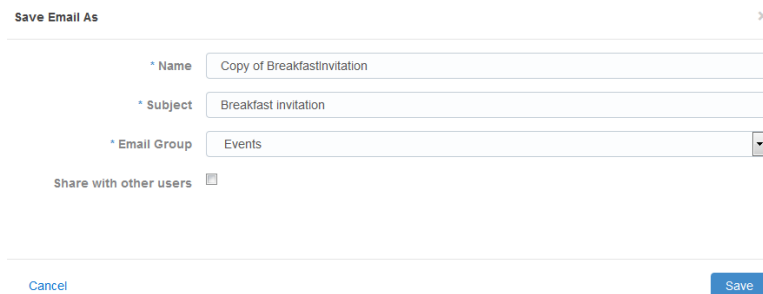
9. [Preview your email.](#)

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 x

\* Name


\* Subject

\* Email Group

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}`.

**i 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).

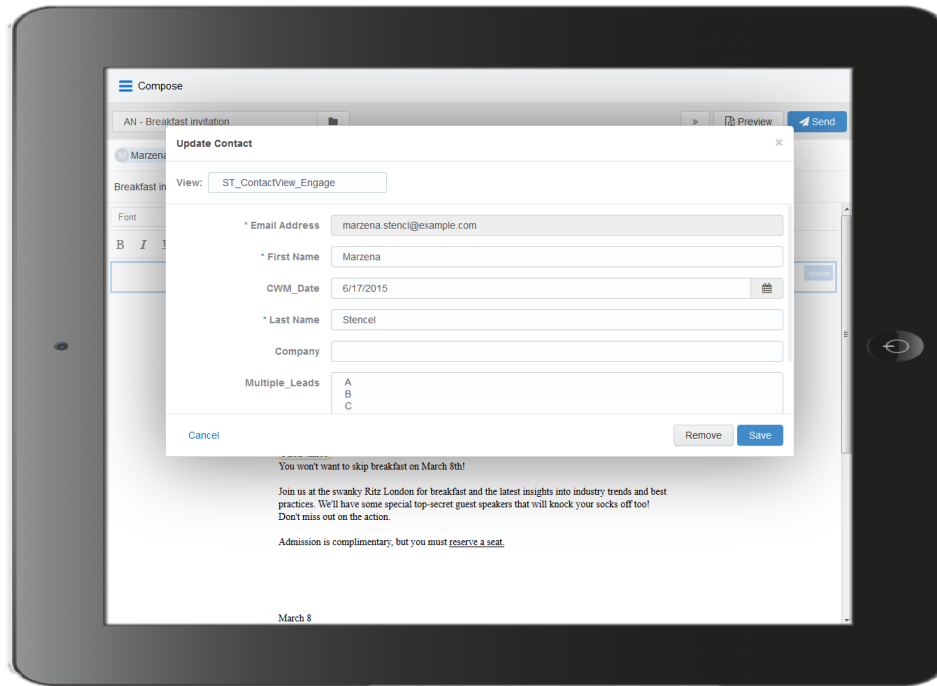
**i Important:** Field merges can cause incorrect values in email sent from Engage if the corresponding contact fields for individual contacts are blank or contain default values such as `First Name`. Best practice is to populate all fields for which you have accurate information.

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.

**i 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.

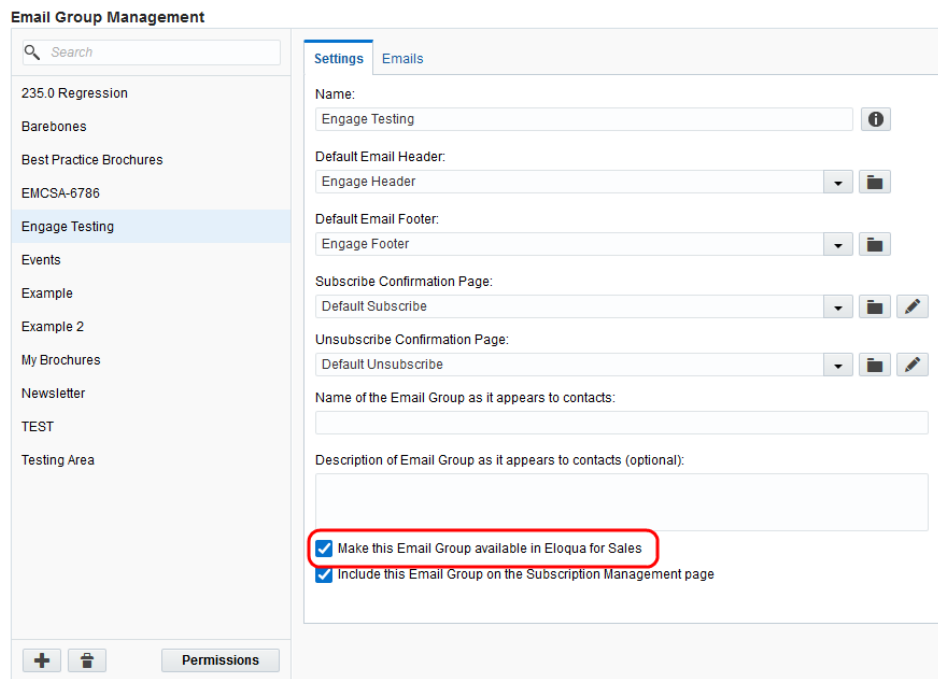
### 3.4.3 Making a template available in Engage

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




The screenshot shows the 'Email Group Management' interface. On the left is a search bar and a list of email groups, with 'Engage Testing' selected. The main area is divided into 'Settings' and 'Emails' tabs. Under 'Settings', there are fields for Name, Default Email Header, Default Email Footer, Subscribe Confirmation Page, and Unsubscribe Confirmation Page. Below these are text boxes for the group's name and description as they appear to contacts. At the bottom, two checkboxes are visible: 'Make this Email Group available in Eloqua for Sales' (checked and highlighted with a red box) and 'Include this Email Group on the Subscription Management page' (checked). A 'Permissions' button is located at the bottom left of the main area.

- 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.

Asset Permissions				
Specify users or security groups and what level of access they will have to this asset				
User/Group	View	Edit	Delete	Set Security
 Active Users - Sales	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
 Advanced Users - Marketing	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
 Amy Ngo	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
 Basic Users - Marketing	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
 Customer Administrator	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
 Engage Users	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

  Cancel Save

### 3.4.4 Creating an email signature

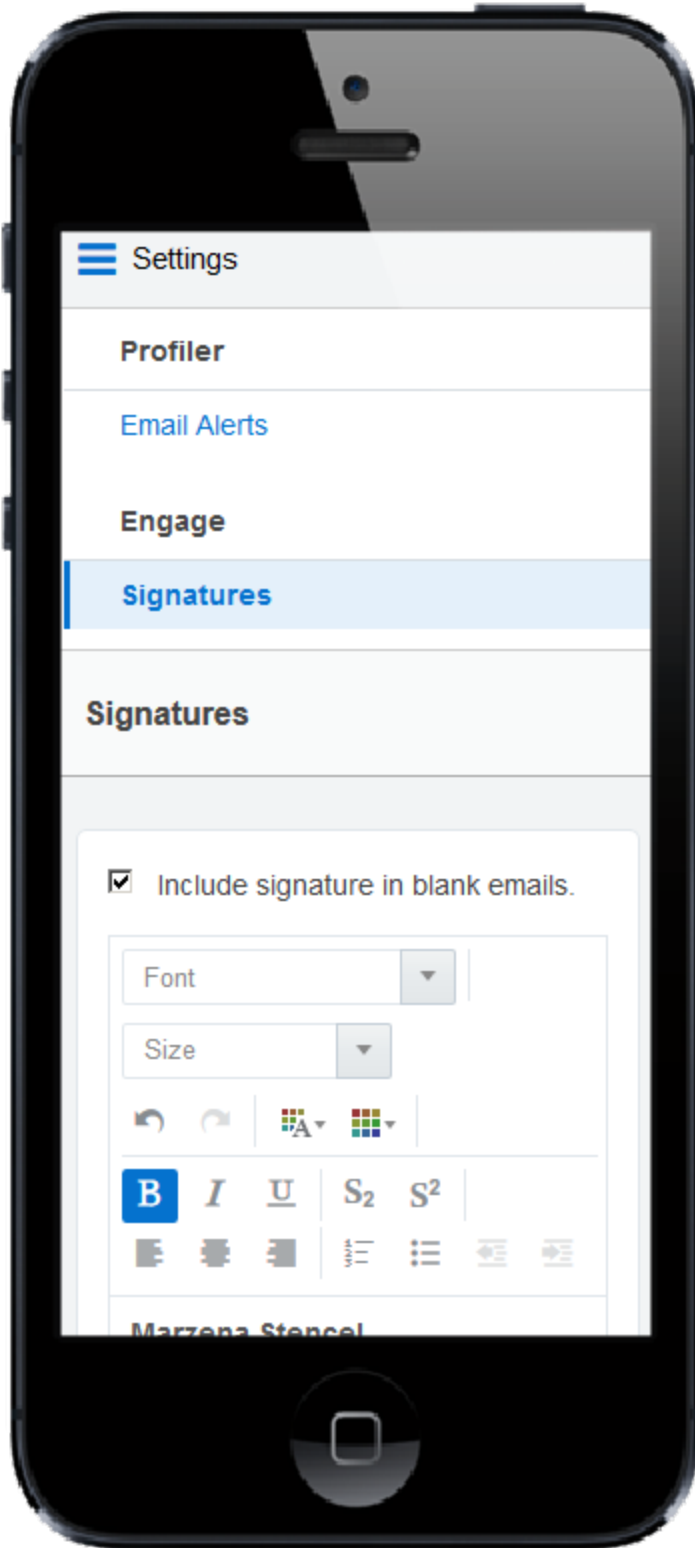
As an Engage user, you can create a personalized email signature that is automatically inserted into your blank emails. If you select a template, the email signature is overwritten.

## 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.

### 3.4.5 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.



Compose

Breakfast invi

M Marzena Stencil

Breakfast invitation

Font Size

B I U S<sub>2</sub> S<sup>2</sup> [Link icon highlighted] [Image icon] [Right arrow icon] [Eraser icon] [Pencil icon]

Acme Breakfast Series  
Learn. Network. Grow.  
RSVP now

FirstNames1  
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

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**

**URL**

---

[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.

### 3.4.6 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}.

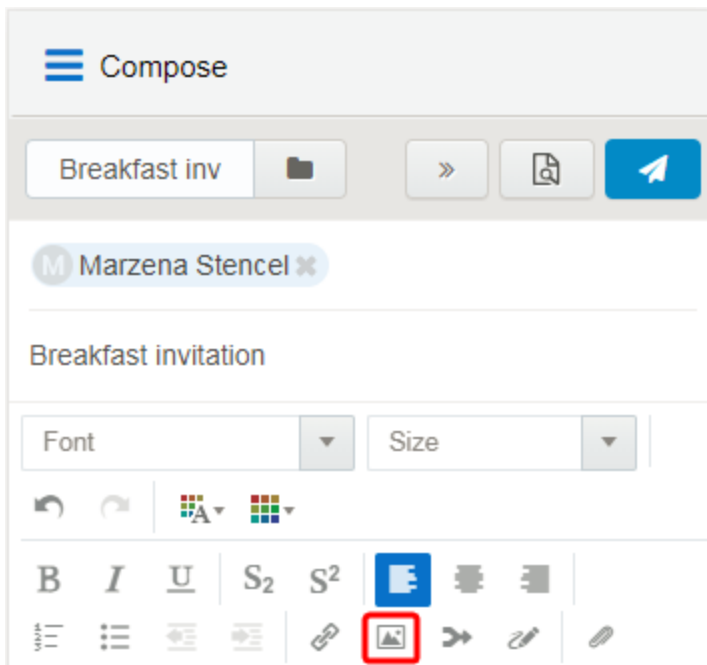
#### Prerequisites

- 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.

**i 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:

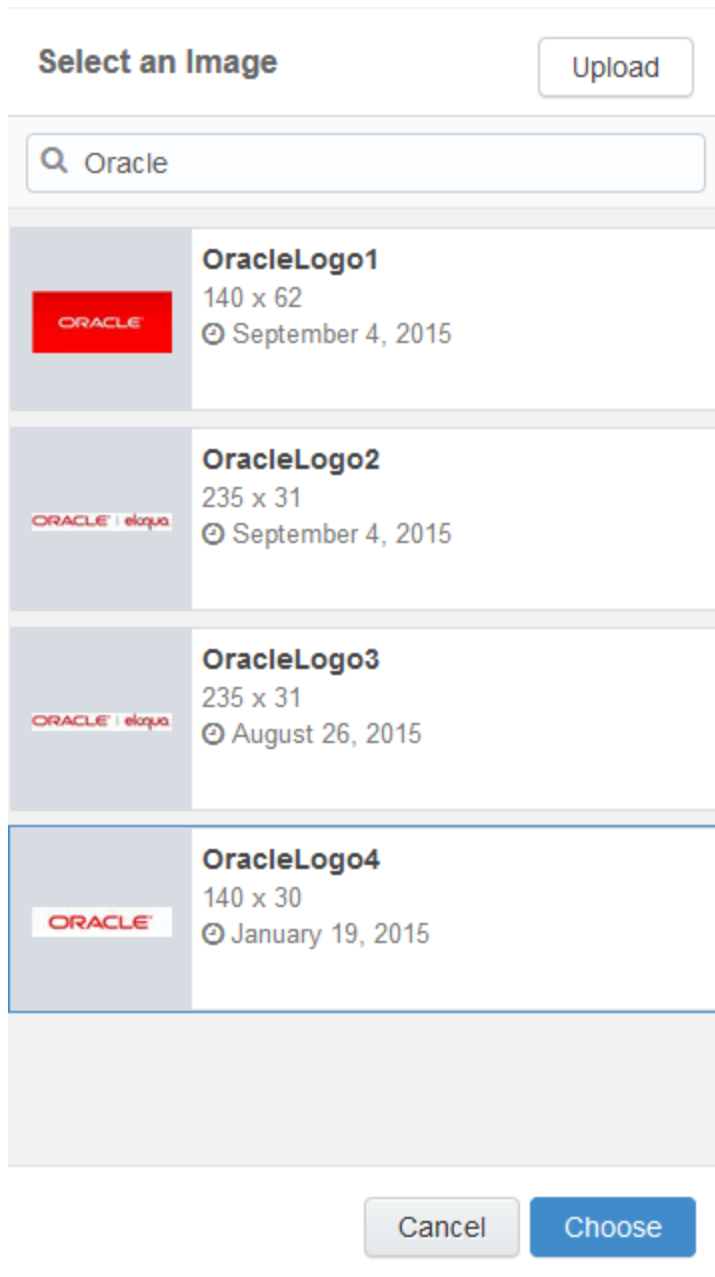
1. [Create a new Engage email](#) or [open an Oracle Eloqua email template](#).
2. Place your cursor at the position in your email where you want the image to appear. It can be moved later if desired. Click the **Image** icon  in the toolbar.



3. Select an image from the Oracle Eloqua image library or click **Upload** to browse your local device.

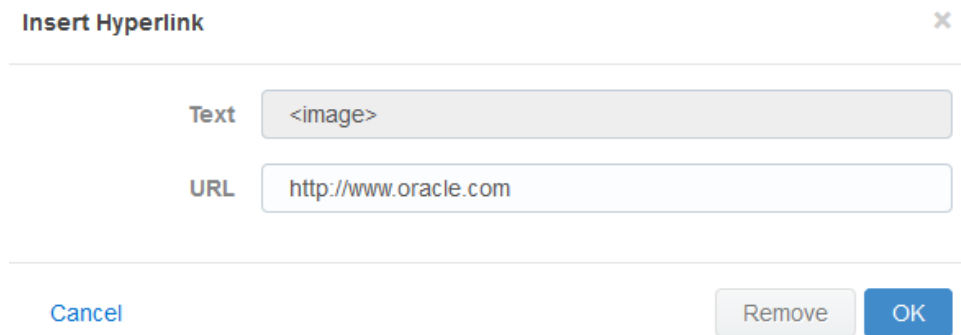
For image uploads, the following file types are supported: GIF, JPG, JPEG, PNG, and SVG.

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.



The screenshot shows a dialog box titled "Insert Hyperlink" with a close button (X) in the top right corner. Below the title bar, there are two input fields. The first is labeled "Text" and contains the value "<image>". The second is labeled "URL" and contains the value "http://www.oracle.com". At the bottom of the dialog, there are three buttons: "Cancel", "Remove", and "OK".


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

### 3.4.7 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.

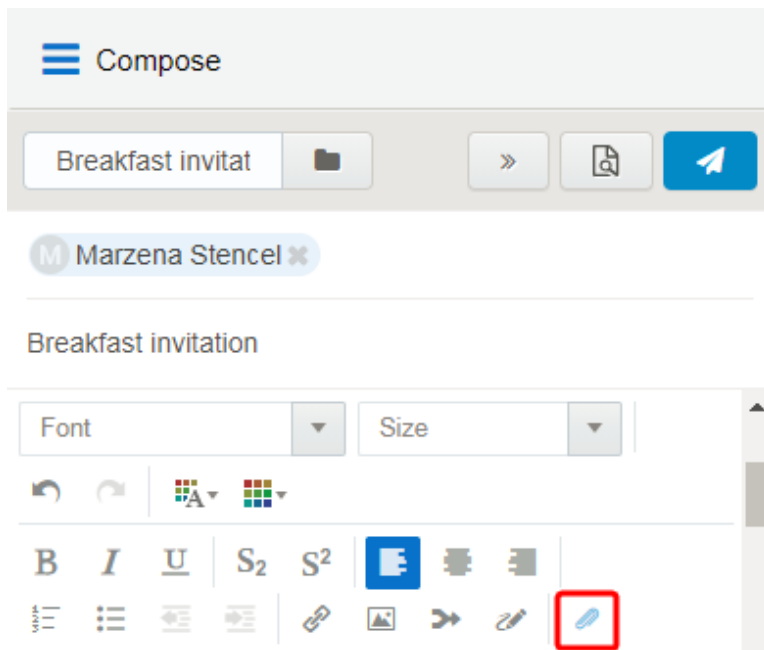
Attachments can be uploaded to a user specific Engage folder: engage-personal-folder-`{userId}`-`{username}` located in the root folder of Oracle Eloqua's File Storage library (Assets → Components → File Storage).

#### 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:

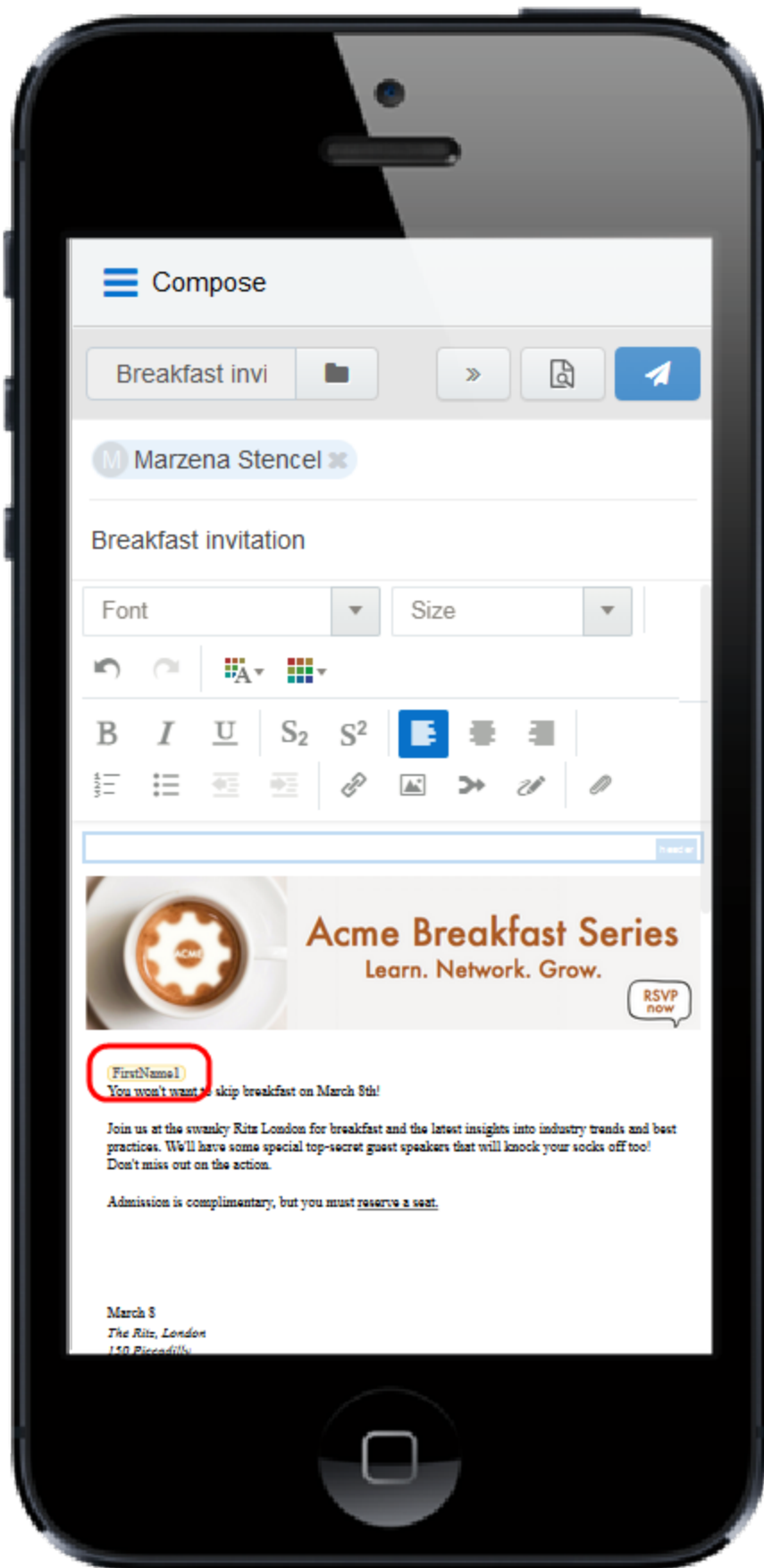
1. Create a new Engage email or open an Oracle Eloqua email template.
2. Click the **Attachment** icon  in the toolbar.



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.


### 3.4.8 Adding field merges to Engage emails

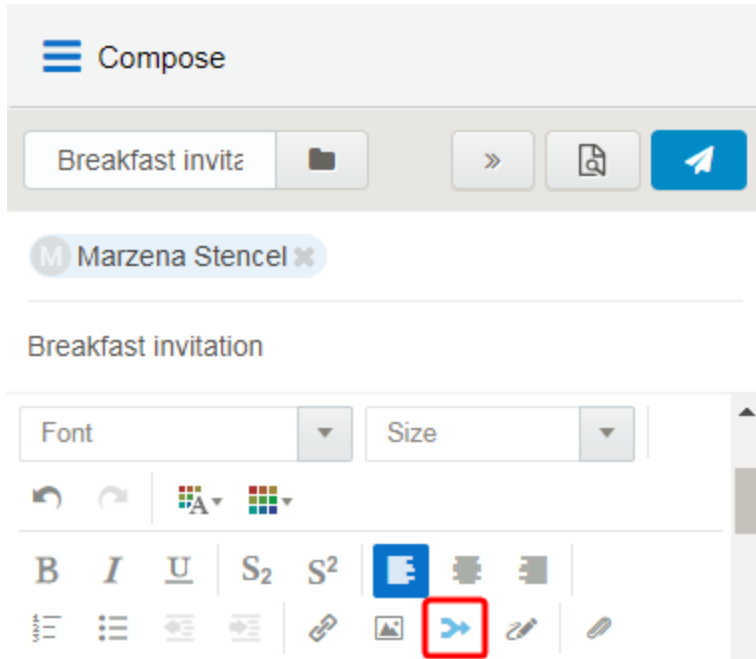
You can insert field merges into your Engage emails. Use field merges to personalize your emails, forms, and landing pages using information from contact records, events, custom objects, or query string values. For example, use a field merge to add a contact's name to an email, pre-populate form fields 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

**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


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.

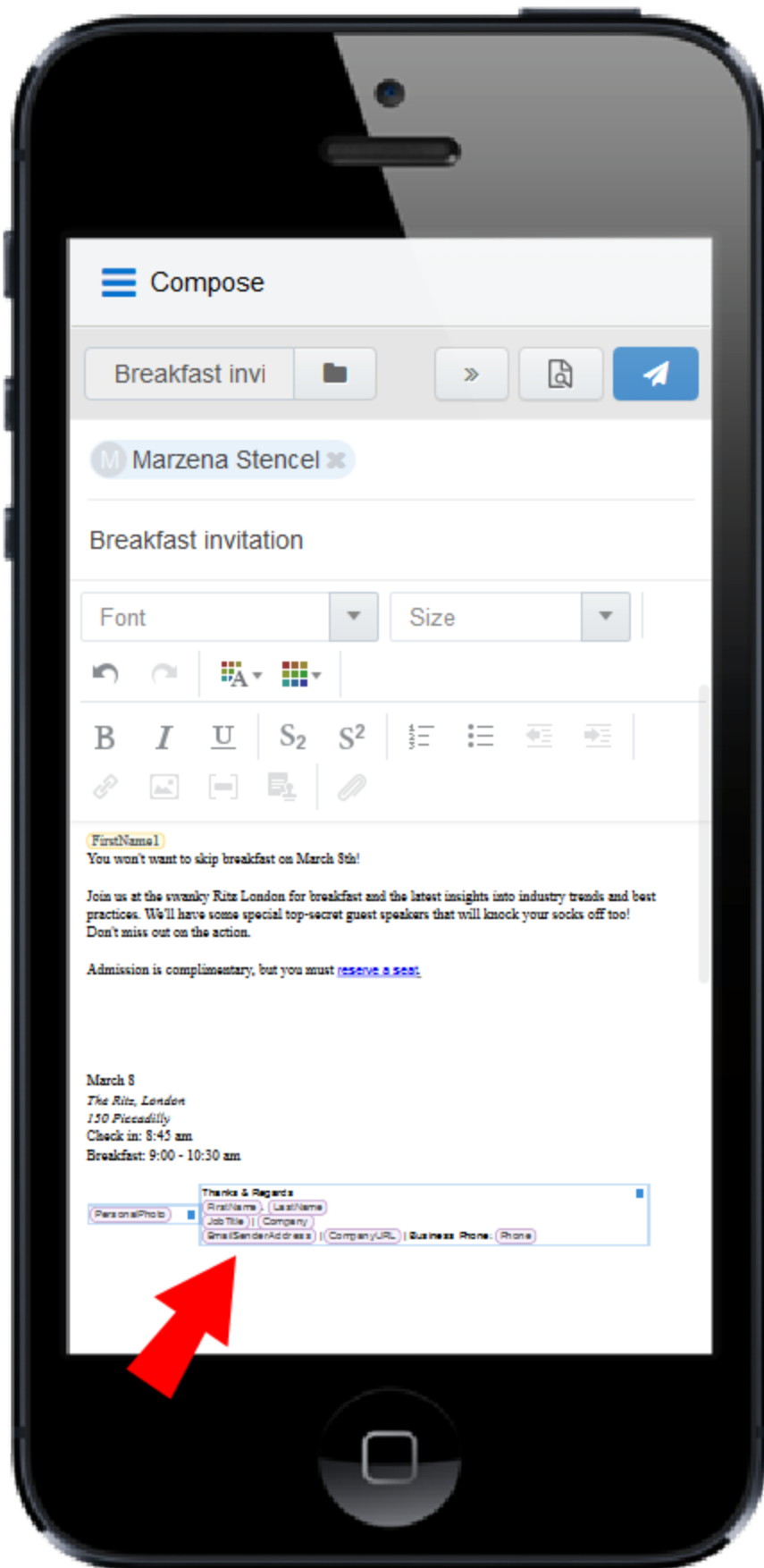
### 3.4.9 Adding signatures to Engage emails

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](#).

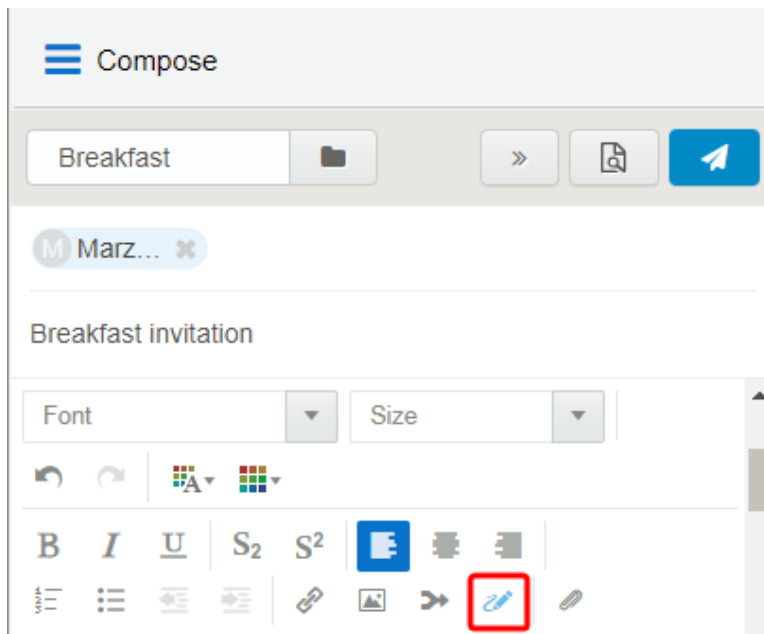
#### Prerequisites:

- 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](#).

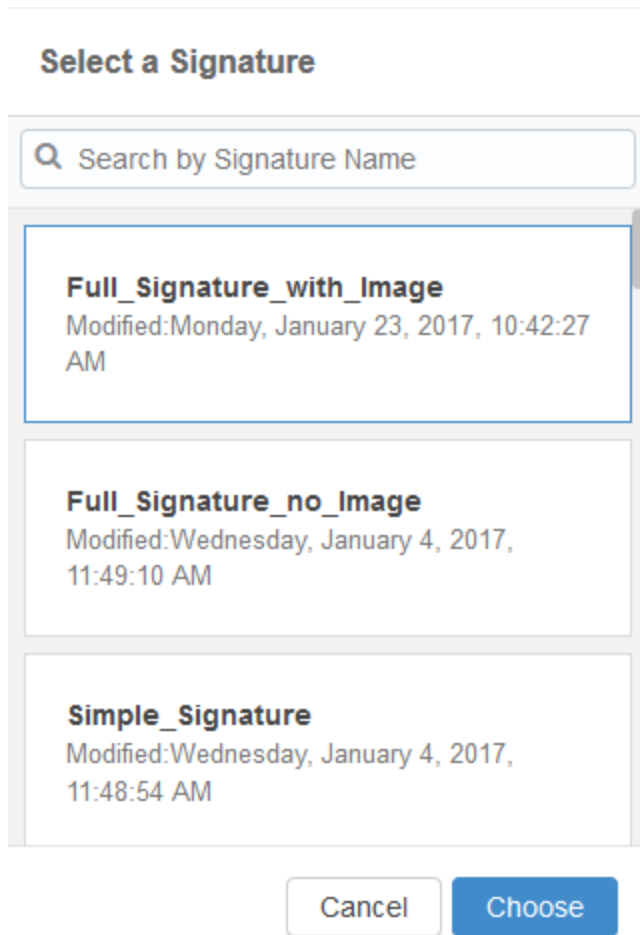


## To add a signature to an email:

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.

### 3.4.10 Previewing Engage emails

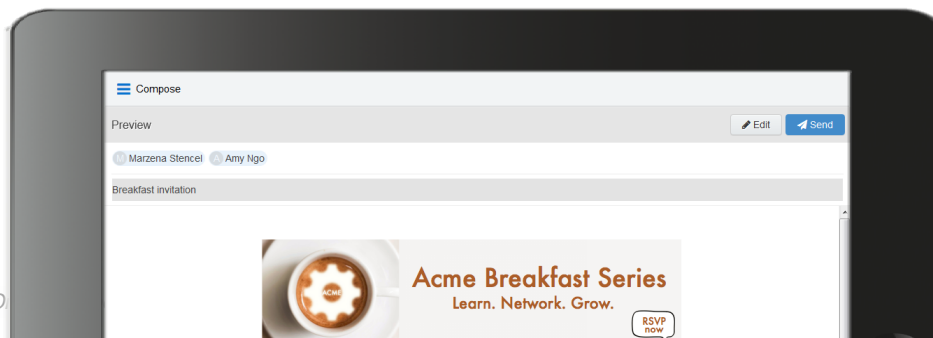
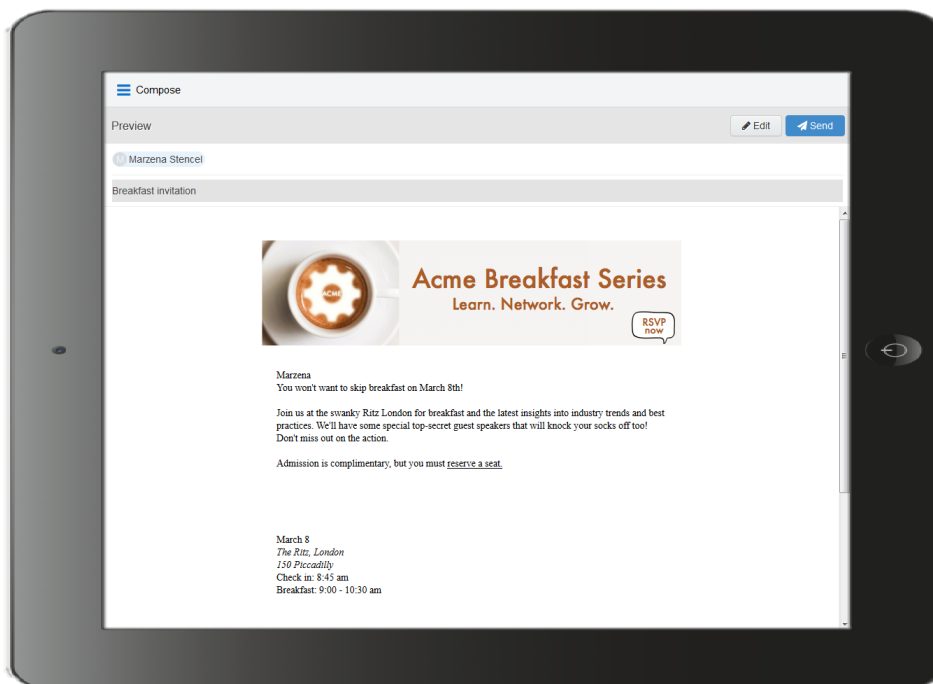
The preview feature allows you to validate the email content prior to sending, which saves time and helps maintain accurate reports compared to sending test emails to yourself or colleagues. The preview displays the email that will be sent to the first recipient and populates any necessary field merges (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.

### 3.4.11 Modifying the *sent from* email address

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

 **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.

General Info (Signature Fields)

Company Display Name: Demo

Website URL:

Job Title:

Business Phone:

Email Sender Display Name: Test User

**Email Reply-To Address: reply.email@oracle.com**

Department:

Mobile Phone:

Fax:

Address 1:

Address 2:

Personal URL:

Personal Message:

Personal Photo: (None)

Digital Signature: (None)

Default Signature Layout: (Global Default)


Capture screenshot

6. Click **Save**.

## 3.5 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.

The screenshot shows the Oracle Engage interface for the 'Emails' section. At the top, there is a search bar and buttons for 'Failed Email Sends' and 'Reports'. The main content area displays a list of emails with the following details:

Date	Subject	Recipients	Envelope Icon	Link Icon	Time
Monday, October 3 2016	Breakfast invitation	Marzena Stencel	2	0	3:22 PM
Thursday, April 21 2016	Webinar invitation	Marzena Stencel	1	0	10:29 AM
Tuesday, April 19 2016	Breakfast invitation follow-up	Marzena Stencel, Nico Cheong (2)	4	0	12:40 PM
	Join us at MME!	Marzena Stencel	2	0	11:16 AM
	Event invitation	Marzena Stencel, Nico Cheong (2)	7	2	11:13 AM

Callouts in the image point to specific features:

- A callout points to the attachment icon on the 'Breakfast invitation' row, stating: 'This email had an attachment'.
- A callout points to the link icon on the 'Breakfast invitation' row, stating: 'Number of links clicked'.
- A callout points to the link icon on the 'Webinar invitation' row, stating: 'Number of email opens'.

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



The screenshot shows the Oracle Engage interface for the 'Emails' section. At the top, there is a search bar and buttons for 'Compose' and 'Successful Email Sends'. The main content area displays a card for an email titled 'WebinarInvitation' with a red warning icon next to it.

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

### Breakfast invitation

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

TO: Amy Ngo , Katie Mauti + 1 more

-  Email
-  Sent
-  Opens
-  Clicks

If you are having trouble reading this email, [read the online version](#).



## Acme Breakfast Series

Learn. Network. Grow.

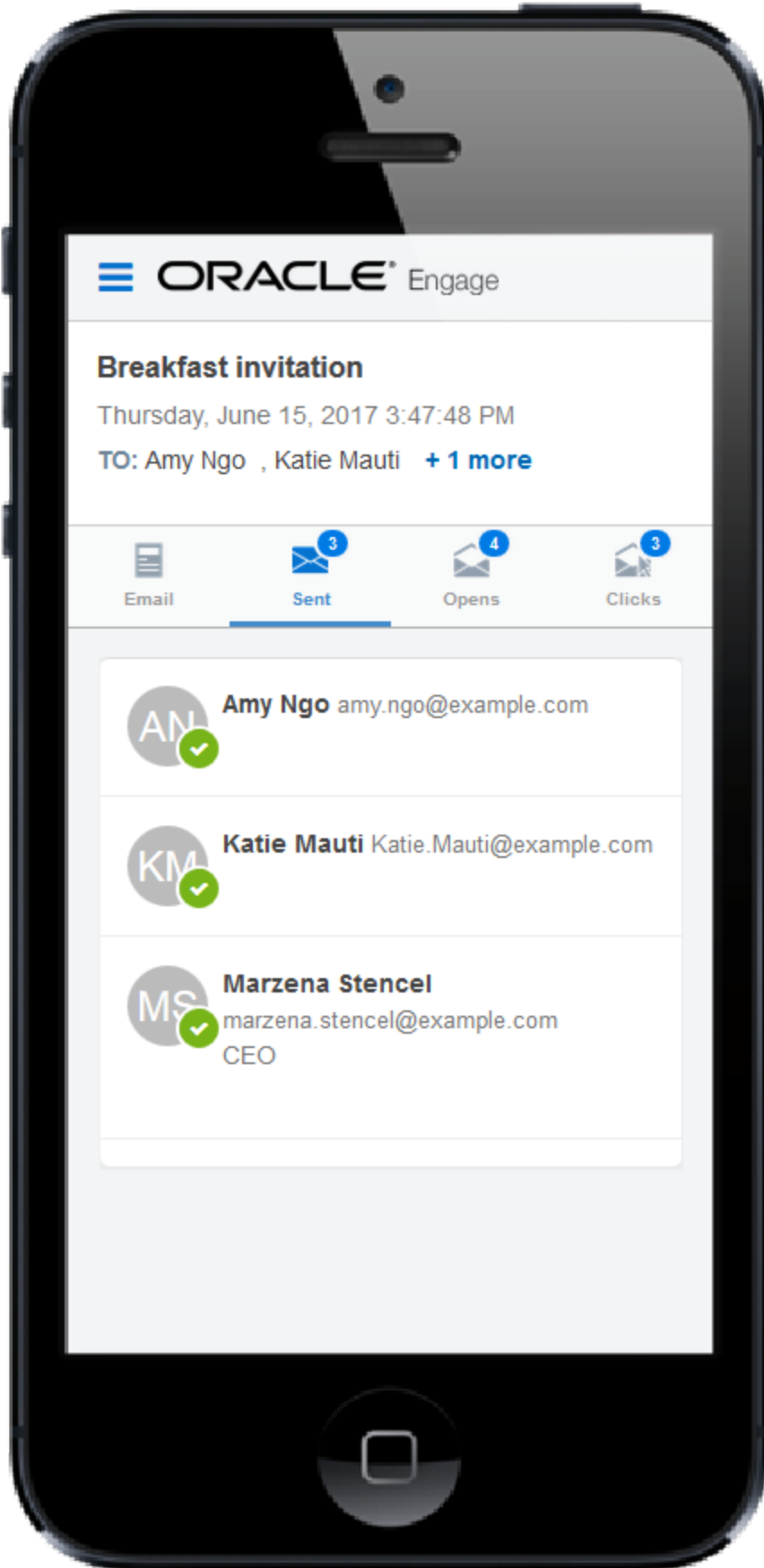
RSVP  
now

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 [register here](#).

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



Opens



Clicks



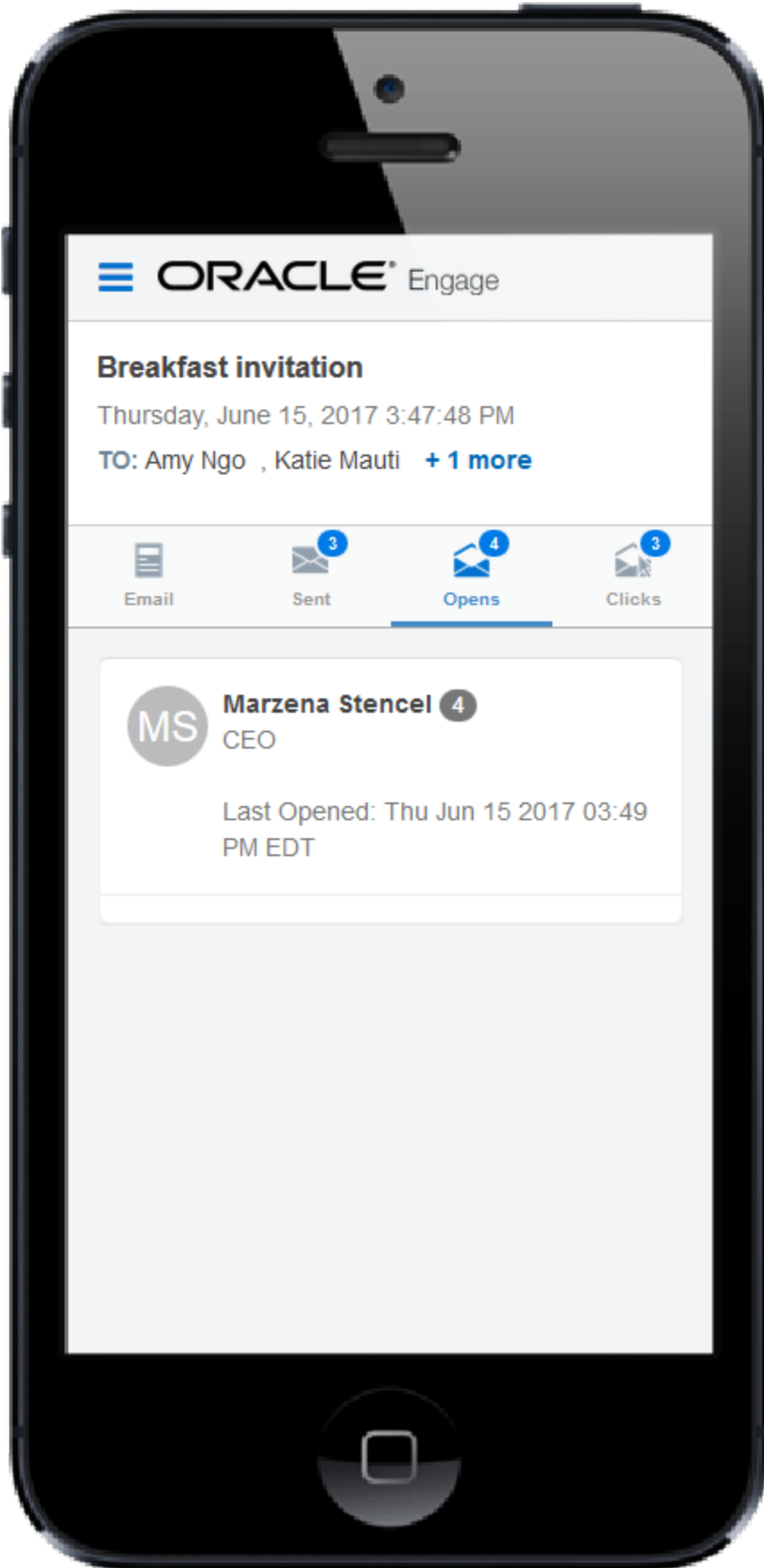
**Amy Ngo** amy.ngo@example.com



**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



Opens



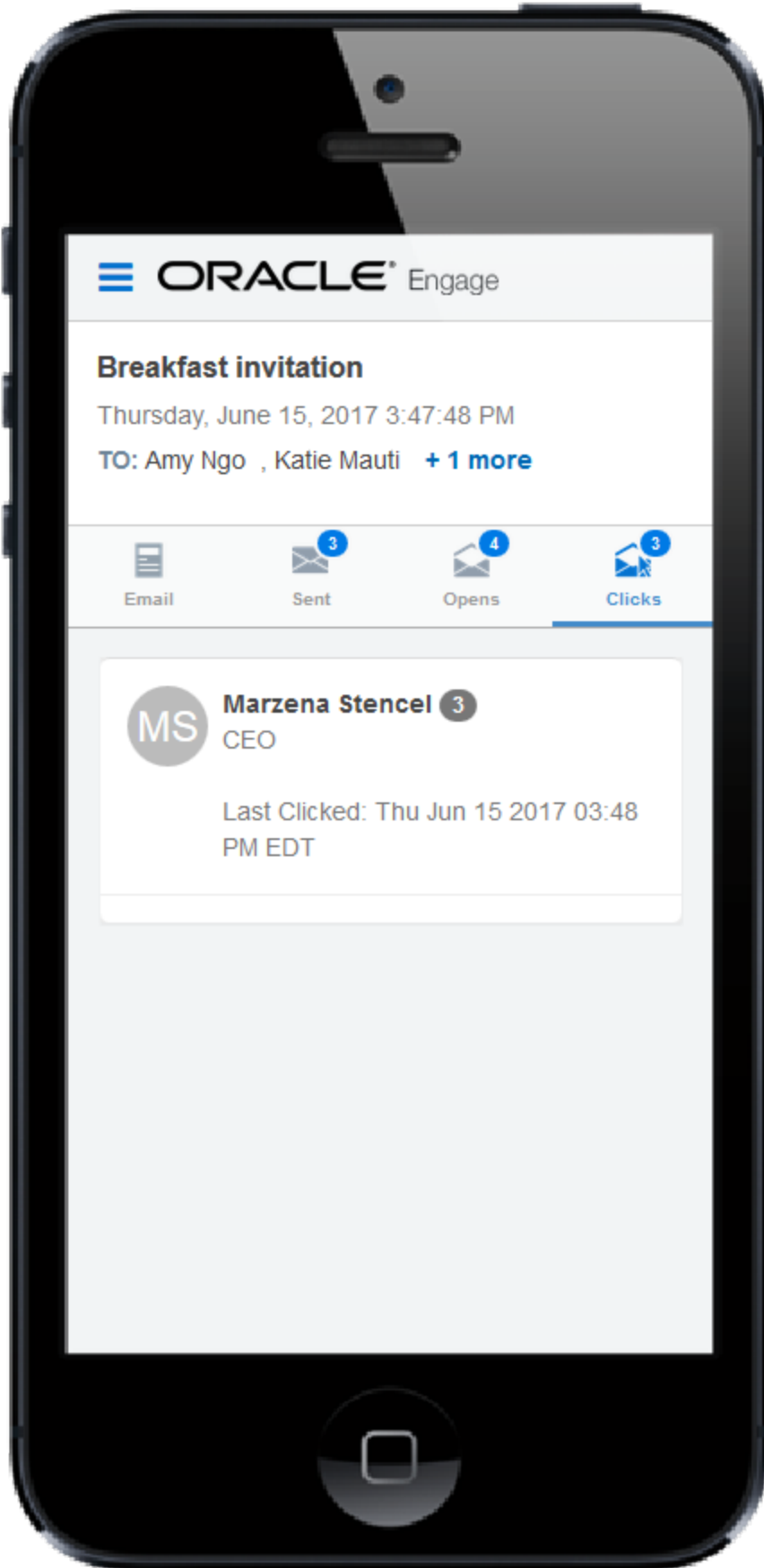
Clicks



**Marzena Stencel** 4

CEO

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



 **ORACLE** Engage

**Breakfast invitation**

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

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



Email



Sent



Opens



Clicks



**Marzena Stencel** 

CEO

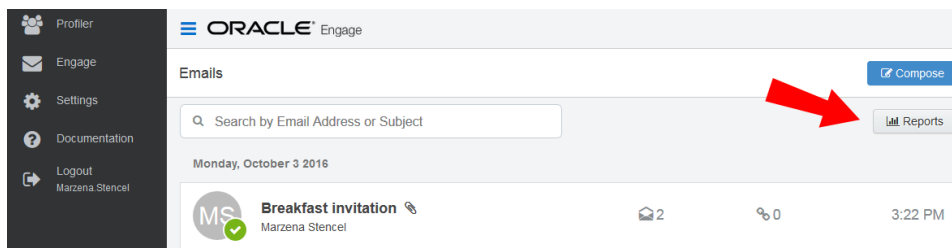
Last Clicked: Thu Jun 15 2017 03:48 PM EDT

- *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.

## 3.6 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).

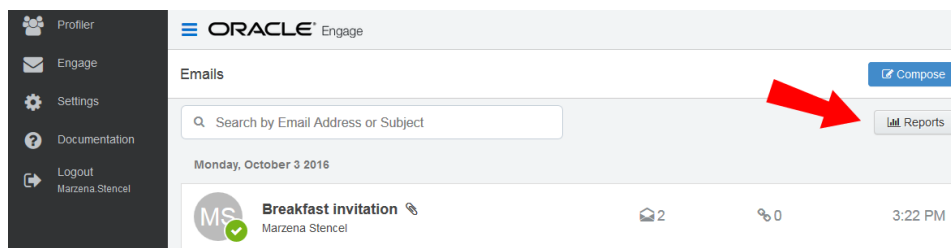
### 3.6.1 Engage Top Templates report


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.

Accessing the Top Templates report

To access the Top Templates report:

1. [Open Engage](#).
2. Click **Reports** on the sent emails page.

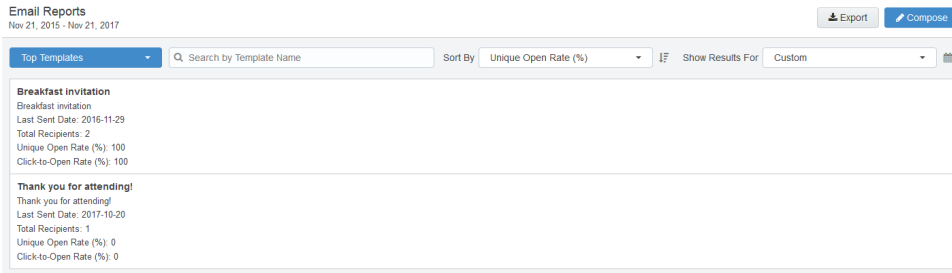


 **Tip:** You can send an email using one of the templates in your report results. Click the template name to load the email compose screen.

Report filters

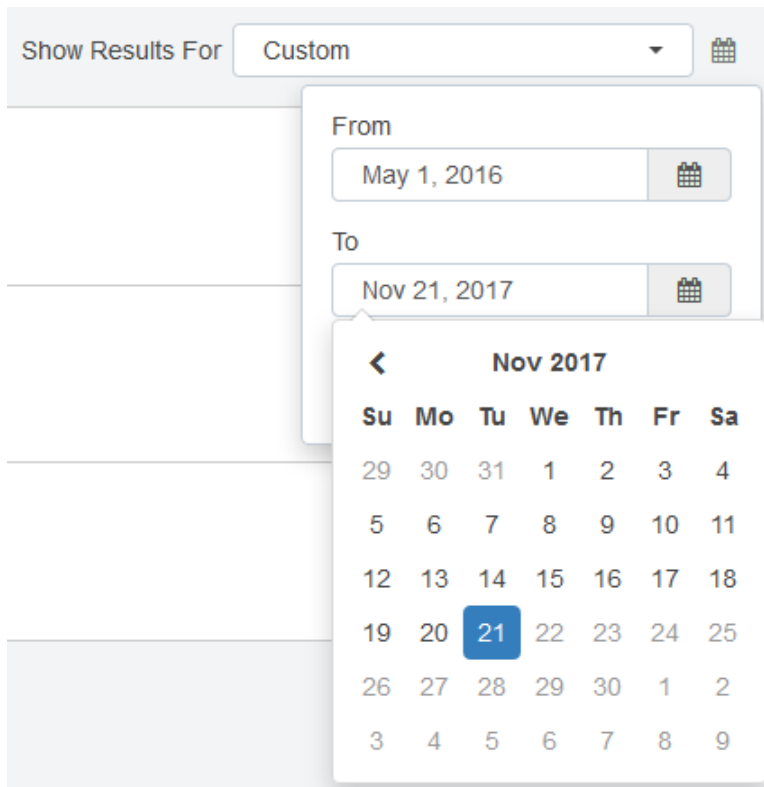
The report displays emails sent by the logged-in user.





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**.



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	<p>The unique opens divided by the total number of times an email was delivered. (Unique Opens / Total Delivered)</p> <p>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.</p> <p>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 <a href="#">how email opens are calculated</a>.</p>
Click-to-Open Rate	<p>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.</p>

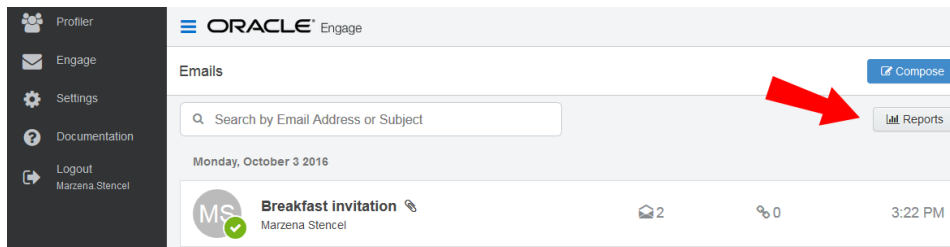
### 3.6.2 Engage Emails By Recipient report

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.

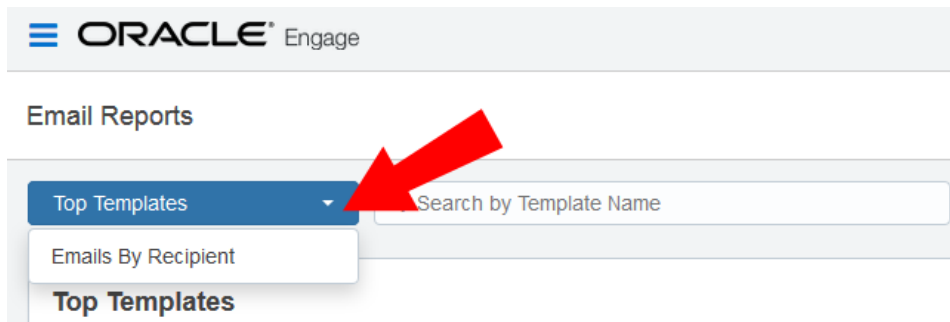
Accessing the Emails By Recipient report


**To access the Emails By Recipient report:**

1. [Open Engage](#).
2. Click **Reports** on the sent emails page.



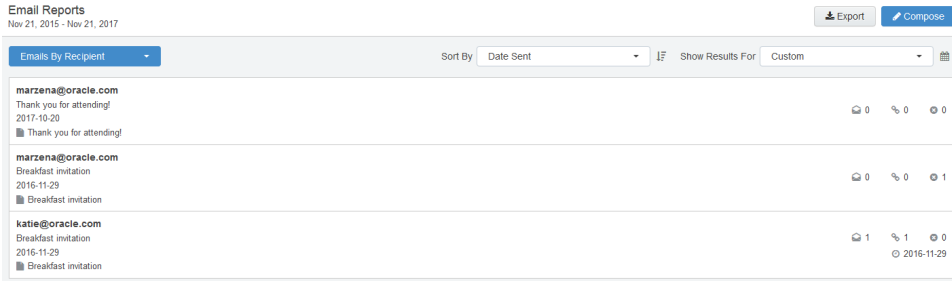
3. Click the **Top Templates** drop-down and select **Emails By Recipient**.



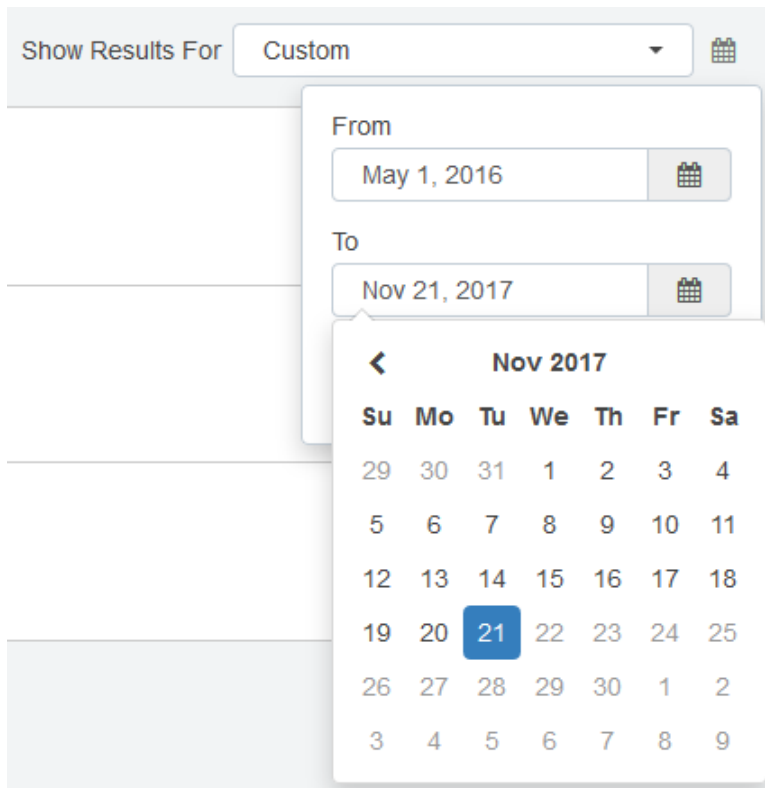
 **Tip:** You can select one or more recipients from this report and send a new email to them. Select your recipients and click **Compose**. Then select your template and create your email.

## 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	<p>The number of times an email was opened. This includes multiple opens by the original recipient or forwarded recipient.</p> <p>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 <a href="#">Calculating email opens</a>.</p>
Total Clicks	<p>The number of times that any tracked link in an email was clicked. This includes multiple clicks by the same recipient.</p>
Hard Bouncebacks	<p>The total number of emails that could not be delivered because of a hard bounceback.</p> <p>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.</p>

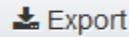
### 3.6.3 Exporting Engage report results

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 filter criteria will be exported.

3. Click **Export**



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

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

## 3.7 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.


### 3.7.1 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?YYYYY"
```

#### **Auto-login:**

```
def eURL="https://login.eloqua.com/autoLogin?LoginPrefix=<Login  
Prefix>&Url=/apps/salesTools/engage?YYYYY"
```

#### **SAML:**

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

**Sales Lead Contacts: Create Action or Link** Save Cancel

\* Display Label

\* Name

\* Type  Action  Link

Description

Source

Display Mode

---

**URL Definition**

Select alternative context Context Object

**Show Palette**

More ▾

Find     Go to Line

1  
2  
3

Paste URL here

 **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](https://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**.

## 3.7.2 Embedding Engage as a tab or button in Salesforce

This section will walk you 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.

### Embedding Engage as buttons on Salesforce Lead and Contact Page layouts


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=<LoginPrefix>&Url=/apps/salesTools/engageZZZZ`
- **SAML:** `https://login.eloqua.com/auth/saml2/autologin?LoginPrefix=<LoginPrefix>&ReturnUrl=/apps/salesTools/engageZZZZ`
- **Salesforce IDP:** `https://<podURL>/sso/sfdc/v1/svp.aspx?LP=<LoginPrefix>&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=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 &.

**i 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

**Custom Button or Link Edit** Save Quick Save Preview Cancel

Label: Eloqua Engage

Name: Eloqua\_Engage

Description: Engage

Display Type:  Detail Page Link [View example](#)  
 Detail Page Button [View example](#)  
 List Button [View example](#)

Behavior: Display in existing window with sidebar [View Behavior Options](#)

Content Source: URL

Select Field Type: Lead | Insert Field: -- Insert Merge Field -- | Insert Operator: --

Engage (Text) =  
`https://login.eloqua.com/auth/saml2/autologin?LoginPrefix=ABCD&ReturnUrl=/apps/salesTools/engage?emailChosen=true`

Functions: -- All Function Category --  
ABS  
AND  
BEGINS  
BLANKVALUE  
CASE  
CASESAFEID  
[Insert Selected Function](#)

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.

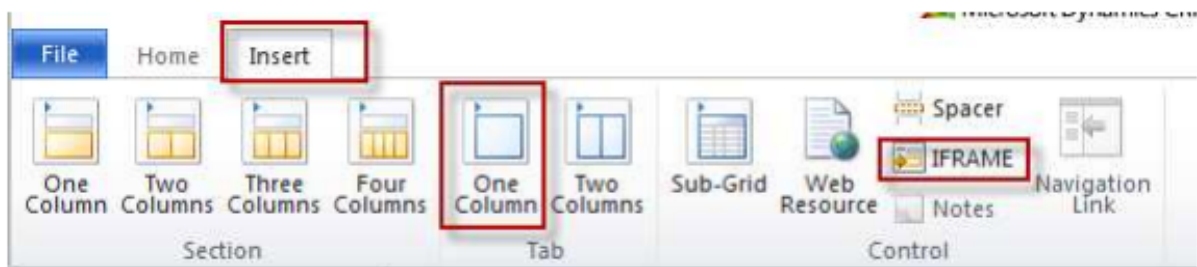
**Note:** Creating a new button instead of modifying an existing one requires you to add that button to the page layout used by your organization. To do this, navigate to **Setup > Customize** (under *Build* section) > **Leads** (or **Contacts**) > **Page Layouts**. Add the button to the page layout,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

### 3.7.3 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](https://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.

### 3.7.4 Embedding Engage in CRM onDemand

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

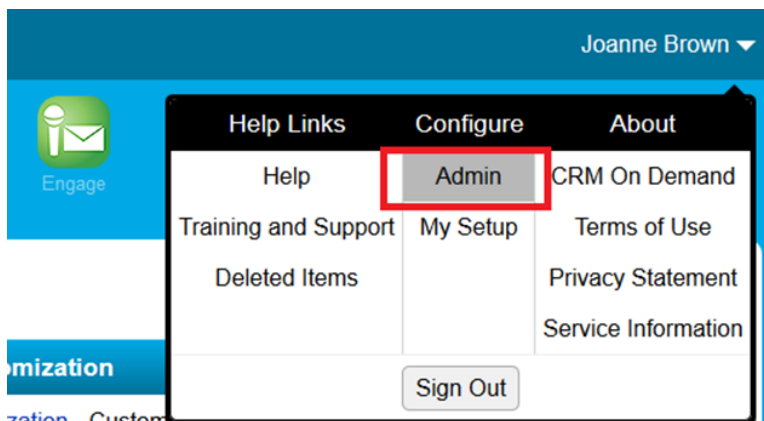
1. [Create a web applet](#)
2. [Add the web applet to a page layout](#)

**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

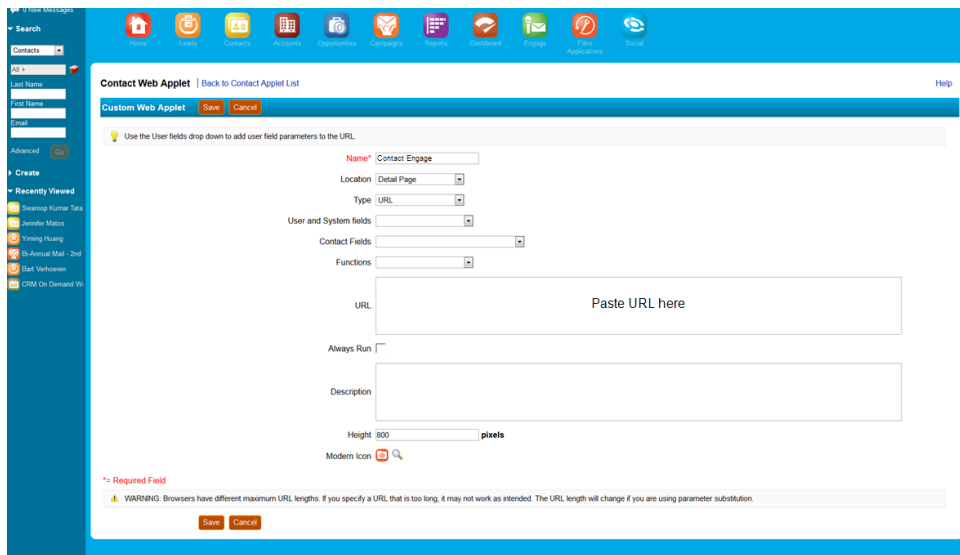
#### To create a web applet:

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

### 3.7.5 Embedding Engage in OKTA with SSO

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

#### 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.

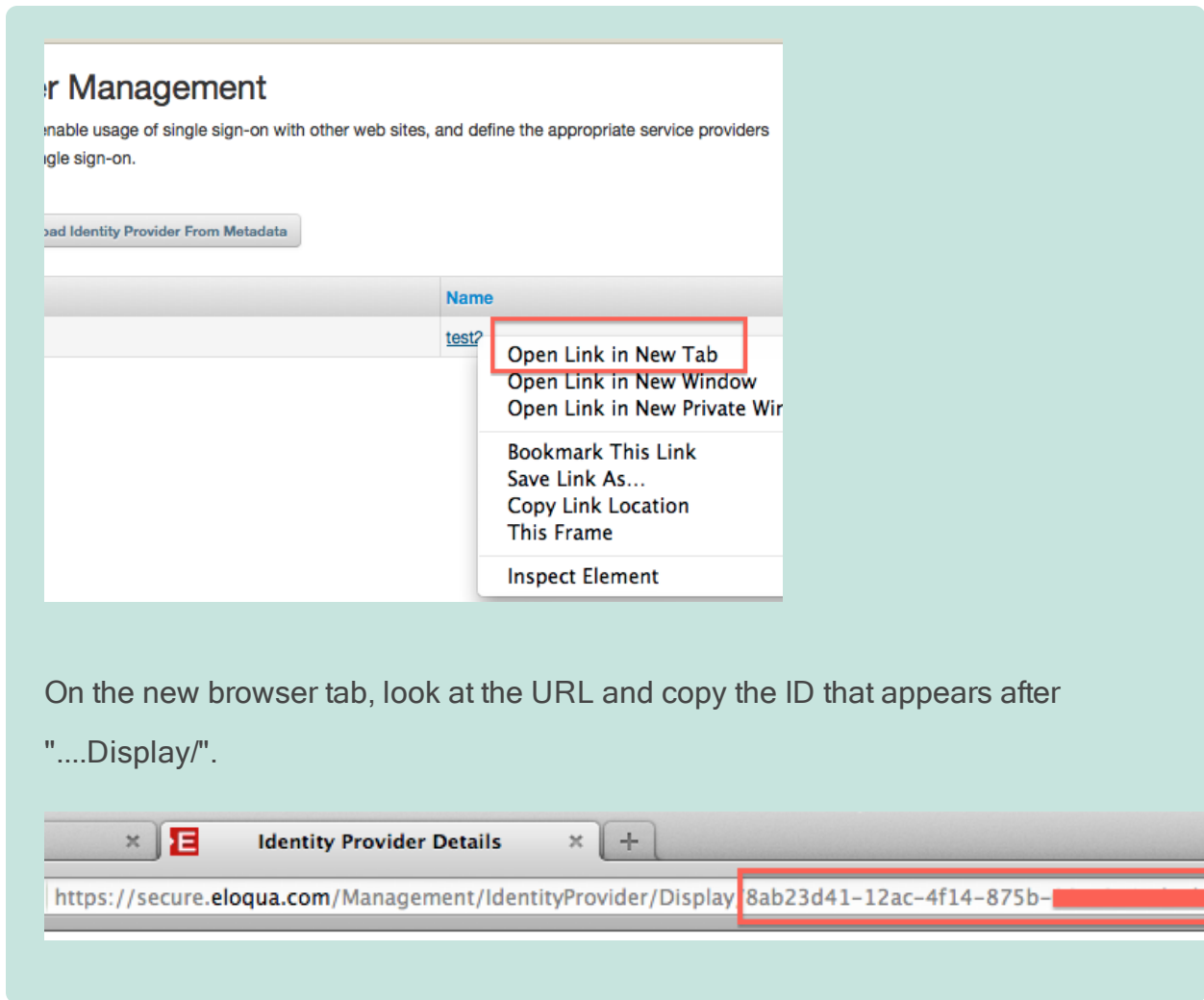
### To configure SSO with OKTA into Engage:

1. Enter the following URL:

```
https://login.eloqua.com/auth/saml2/autologin?LoginPrefix=<LoginPrefix>&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](https://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**



# 4 Oracle Eloqua Sales Tools for Google Chrome

Oracle Eloqua Sales Tools for Google Chrome is an extension for Google Chrome. The extension allows sales representatives to view contacts' profile information from Oracle Eloqua, as well as email prospects more efficiently by displaying contact information from [Profiler](#) in an easy to access pop-up in your browser. By using the extension, you no longer need to open Profiler in a separate tab and manually search for contacts. You can also access Engage to send emails to contacts.

The screenshot displays the Oracle Profiler app interface for Allison Burnett, a Product Manager at Oracle Eloqua. A red arrow points to a notification icon in the top right corner. The interface includes a search bar, a user profile card with a '+ Alert' button and social media icons, and a 'Summary' tab. The 'Activities' section features a bar chart for the period 10/3 - 11/2, showing various activity types like Form Submissions, Email Sends, Email Opens, External Activities, Web Page Visits, and Email Clicks. The 'Latest Activities' section is partially visible below the chart. At the bottom, there are links for 'Help Improve this product' and 'Submit Feedback'.

👍 **Tip:** Please share your feedback by clicking **Submit Feedback** and let us know how we can improve this app. If you require support, please log in to [My Oracle Support](#) and create a service request.

Oracle Eloqua Sales Tools for Google Chrome is able to:

1. [Match to Eloqua contacts based on email addresses on a web page](#)
2. [Match to Eloqua contacts based on a domain](#)
3. [Match to Eloqua contacts based on a LinkedIn profile page](#)

## 4.1 Installing Sales Tools for Google Chrome

Oracle Eloqua Sales Tools for Google Chrome is installed as a Chrome extension in your browser.

### Prerequisites

- A [Profiler](#) license is required. Some features of Sales Tools for Chrome may be used with [Engage](#), but Engage is not required for access.
- Profiler must be installed and configured in your Oracle Eloqua instance.
- Google Chrome web browser must be installed on your machine.

### To install Oracle Eloqua Sales Tools for Google Chrome:

1. Navigate to the Oracle Eloqua Sales Tools extension page on the Google Chrome web store:

<https://chrome.google.com/webstore/detail/oracle-eloqua-sales-tools/jngjmljecflgeoiagcladdhpcalcdfpm>

or navigate to the Google Chrome web store

<https://chrome.google.com/webstore/category/extensions> and search for *Oracle Eloqua Sales Tools*.


2. Click **Add to Chrome**.
3. In the confirmation pop-up, click **Add extension**.

Sales Tools for Google Chrome is now installed. The extension icon appears next to the Chrome menu in your browser.

## 4.2 Accessing Sales Tools for Google Chrome

Oracle Eloqua Sales Tools for Google Chrome is accessed with your Oracle Eloqua credentials.

- Sales Tools for Google Chrome must be [installed](#).

 **Note:** If you are already currently logged in to Oracle Eloqua, you do not need to login to Oracle Eloqua Sales Tools for Google Chrome.

**To access Oracle Eloqua Sales Tools for Google Chrome:**

1. Click the Sales Tools for Google Chrome icon in Chrome.
2. Click **Authenticate Now**.

3. Enter your Eloqua credentials and click **Sign In**.

Oracle Eloqua  
Marketing Cloud

*Company Name*

*Username*

*Password*

**Sign In** [Can't sign in?](#)

Remember Me

[Sign in with SSO or another account](#)

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

[Help Improve this product](#) [Submit Feedback](#)

**i Important:** If you are leveraging Single Sign On, click **Use Another Account** to sign in with your company credentials. If you are unsure of how to complete the *Company* field, please contact your administrator.

You are now logged into the Sales Tools for Google Chrome and can access contact information from Profiler in the pop-up in your browser.

## 4.3 Matching to Oracle Eloqua contacts based on email addresses on a web page

When navigating to a web page with one or more email addresses, Oracle Eloqua Sales Tools for Google Chrome displays those email addresses in a list. The Profiler icon is displayed for any matching contacts inside Eloqua. Therefore, you can quickly view their Profiler digital body language (contact details, activities, lead score value, and so on).

The extension also provides the option to email any users on the page using Engage. Clicking the Engage icon next to a contact opens Engage in a separate tab, automatically populating the *To* field. If there are multiple email addresses on the page, you have the option to email all contacts.


**💡 Note:** In order to use this feature, Search must be enabled in Profiler Global Settings while [installing](#) or [re-configuring](#) Profiler.

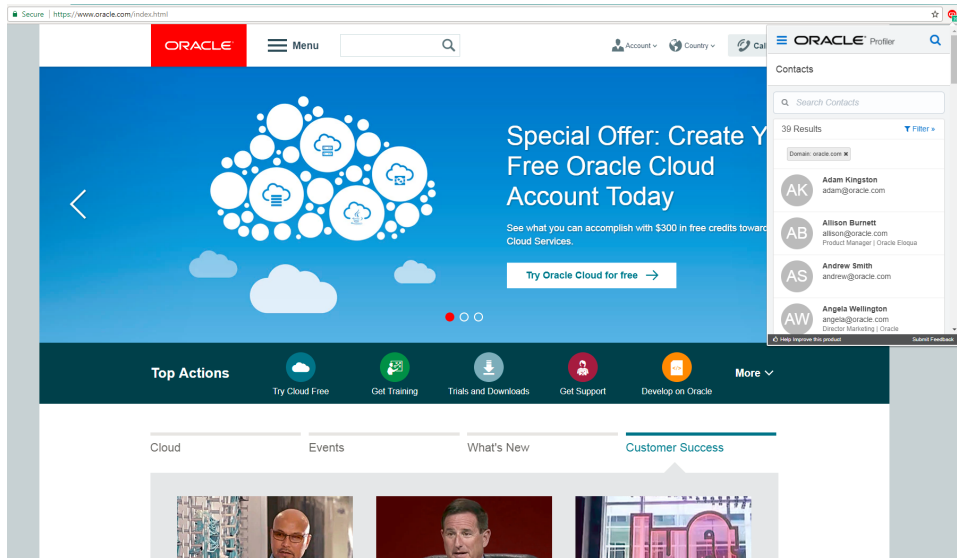
**To match Eloqua contacts based on email addresses on a web page:**

1. Navigate to a web page.
2. Click the Oracle Eloqua Sales Tools for Google Chrome icon.
3. Click the **plus x emails found on this web page** tab to expand it. A list of contacts matching the email address(es) on the web page is displayed. You can [filter your contacts](#). You can now perform the following actions:
  - Click individual contacts to view their Profiler digital body language.
  - Click the Engage icon next to any contact. Engage opens in a separate tab where you can select (or create) an email and modify the recipients.
  - Click **Send Email to All** to send an email to all contacts on the list using Engage.

## 4.4 Matching to Oracle Eloqua contacts based on a domain

If you are investigating a company by visiting their website, Oracle Eloqua Sales Tools for Google Chrome looks up the contacts at that domain (or company). These contacts are found by comparing the domain of contact's email addresses in Eloqua with the domain of the web page. This includes web pages with subdomains as well as nested pages.

 **Example:** If you navigate to [www.oracle.com](http://www.oracle.com), Oracle Eloqua Sales Tools for Google Chrome will display all the contacts in Eloqua with *Oracle* in their email address.



The number of contacts found is displayed in the badge on the extension icon. The badge updates to show the contacts at the a web page for a new tab or window.

**Note:** In order to use this feature, Search must be enabled in Profiler Global Settings while [installing](#) or [re-configuring](#) Profiler.

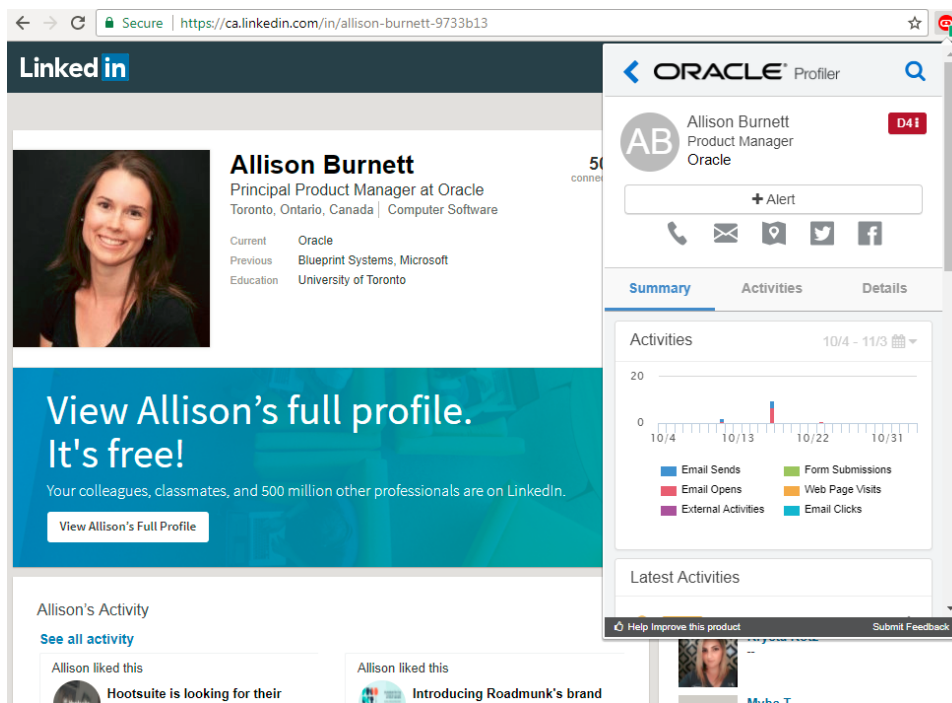
### To match Eloqua contacts based on a domain:

1. Navigate to a web page.
2. Click the Oracle Eloqua Sales Tools for Google Chrome icon. A list of Eloqua contacts whose email address matches the domain of the website is displayed. You can [filter your contacts](#).
3. Click individual contacts to view their Profiler digital body language.




## 4.5 Matching to Oracle Eloqua contacts based on a LinkedIn profile page

When on a LinkedIn profile page, Oracle Eloqua Sales Tools for Google Chrome performs a lookup for that contact inside Eloqua. The lookup is based on first name and last name. The number of matching contacts is displayed in the badge on the extension icon. If there is a single contact found, the Profiler digital body language is displayed. You may also email the contact(s) by clicking the Engage icon.



The screenshot shows a LinkedIn profile for Allison Burnett, Principal Product Manager at Oracle. The Oracle Profiler extension is overlaid on the right side of the browser window. The extension displays Allison Burnett's name, title, and company, along with a 'D41' badge and an '+ Alert' button. Below this, there are social media icons for phone, email, and social media. The extension also shows a 'Summary' tab with an 'Activities' section, which includes a bar chart showing activity levels from 10/4 to 10/31. The chart shows activity for Email Sends, Email Opens, External Activities, Form Submissions, Web Page Visits, and Email Clicks. The 'Latest Activities' section is also visible.

If you navigate to any other LinkedIn page (other than a profile page), all contacts at the domain *LinkedIn* are displayed.

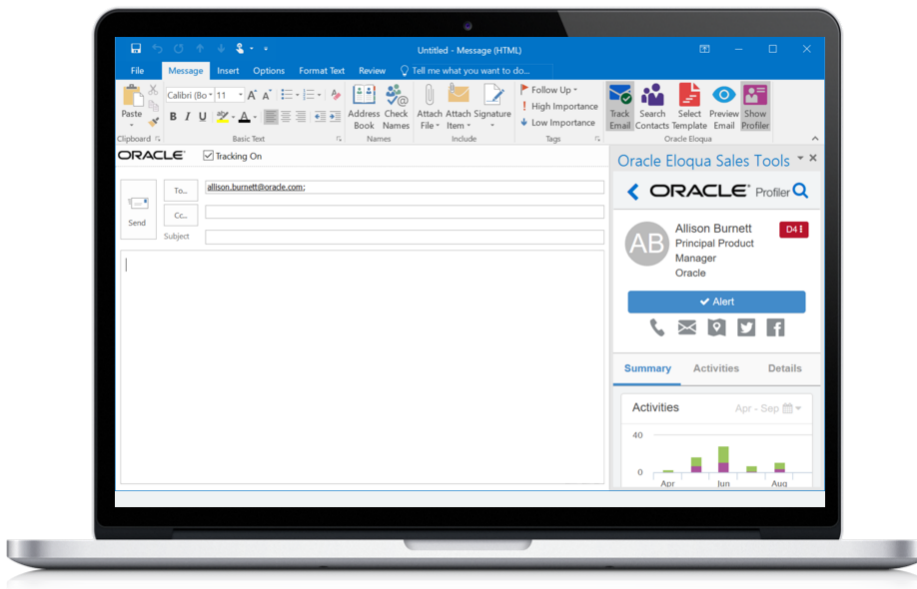
 **Note:** In order to use this feature, Search must be enabled in Profiler Global Settings while [installing](#) or [re-configuring](#) Profiler.

### To match Eloqua contacts based on a LinkedIn profile page:

1. Navigate to a LinkedIn profile page.
2. Click the Sales Tools for Google Chrome icon.
  - If a single contact is found (based on matching first name and last name), their Profiler digital body language is displayed.
  - If multiple contacts are found, they are listed. Select each contact to view their Profiler digital body language.
  - If there are no matching contacts, a *contact not found* message is displayed.
  - You may also email the contact(s) by clicking the Engage icon.

# 5 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
<b>Analyze Digital Body Language</b> by drilling into cross-channel buyer activities including email open/clicks, form submission, web activity and more.	<b>Engage with Insight</b> leveraging pre-approved marketing templates or personal emails without having to leave the Outlook email composer.
<b>Browse Lead Scores</b> to identify the right opportunity to chase for your buyers and prospects.	<b>Track Every Interaction</b> by enabling tracking on Outlook Emails, whether you're using a marketing template or writing a more personal email.
<b>Set-up Web Alerts</b> and get notified once a key prospects visits your website	<b>Leverage Marketing Approved Content</b> by having access to email templates straight within Microsoft Outlook.

Learn more by [watching the video!](#)

# 6 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




# 7 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	<ul style="list-style-type: none"><li>• Microsoft Outlook 2010 SP1 / Microsoft Outlook 2010 SP2</li><li>• Microsoft Outlook 2013 / Microsoft Outlook 2013 SP1</li><li>• Microsoft Outlook 2016</li></ul>
Operating system	<ul style="list-style-type: none"><li>• Microsoft Windows 7 SP1</li><li>• Microsoft Windows 8.1 and higher</li><li>• Microsoft Windows 10</li></ul>
<p> <b>Note:</b> Microsoft Outlook for Mac OS is not currently supported.</p>	
Microsoft Exchange Server	<ul style="list-style-type: none"><li>• Microsoft Exchange Server 2010</li><li>• Microsoft Exchange Server 2013</li></ul>

	<ul style="list-style-type: none"> <li>• Microsoft Exchange Server 2016</li> <li>• Microsoft Office 365</li> </ul>
Mailbox storage	<ul style="list-style-type: none"> <li>• OST in Cached Exchange Mode (default mode)</li> <li>• PST</li> </ul>
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 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:

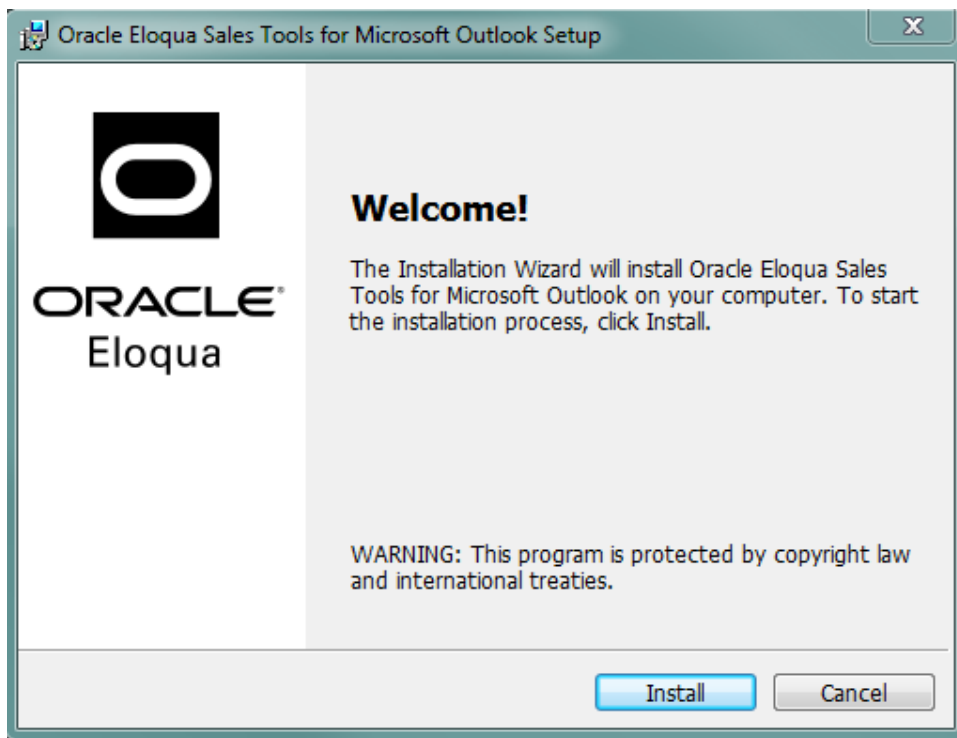
<https://cloud.oracle.com/marketplace/app/SalesToolsMicrosoftOutlookWin32>

Windows 64-bit:

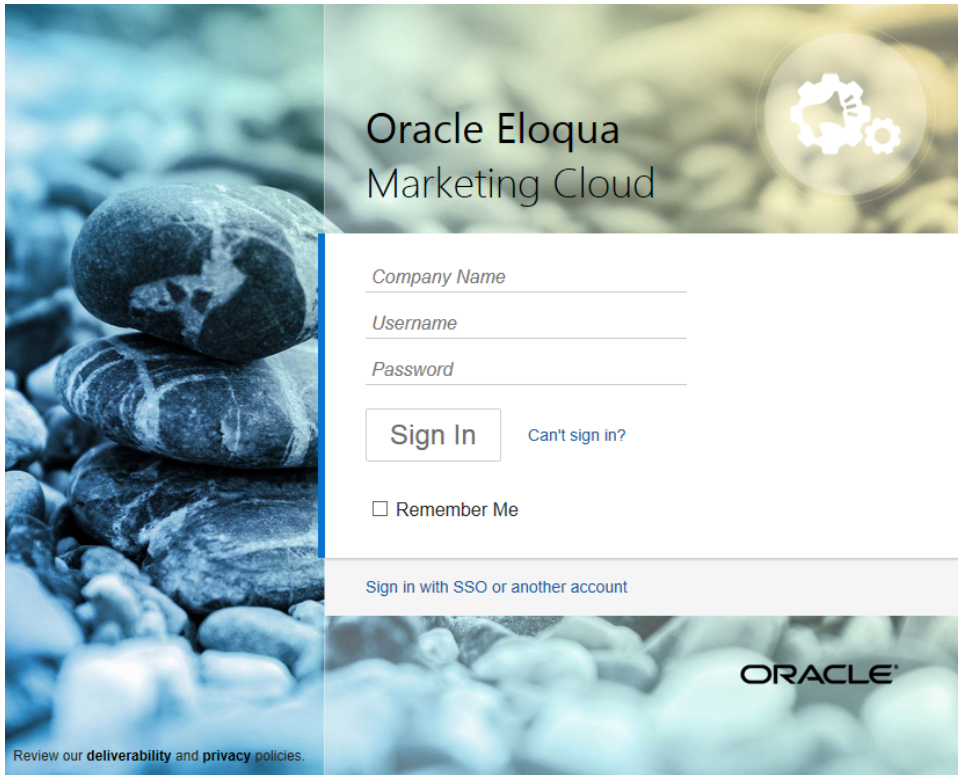
<https://cloud.oracle.com/marketplace/app/SalesToolsMicrosoftOutlookWin64>

3. Click **Get App**.

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

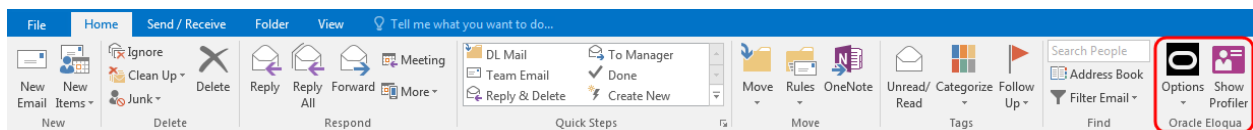


5. Open Microsoft Outlook.
6. Sign in to Oracle Eloqua using your company name and credentials. If your company leverages single sign-on, click **Sign in with SSO or another account**.



**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.



# 8 Accessing Oracle Eloqua Sales Tools for Microsoft Outlook

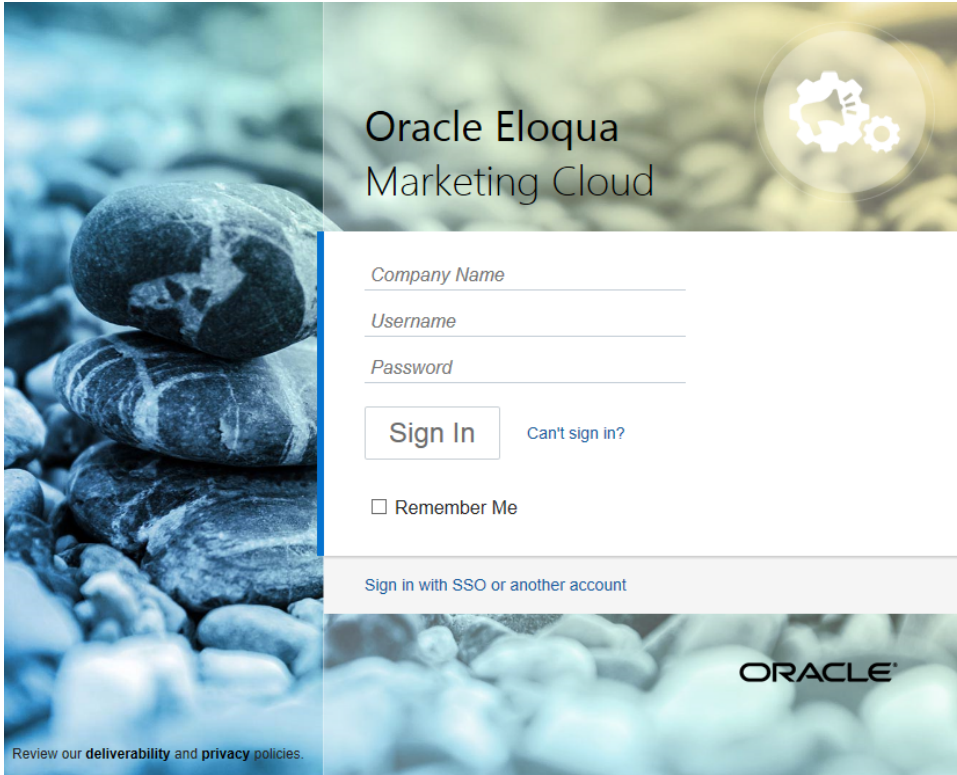
This topic outlines how to access the Oracle Eloqua Sales Tools for Microsoft Outlook add-in once it has been installed.


## 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**.



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

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

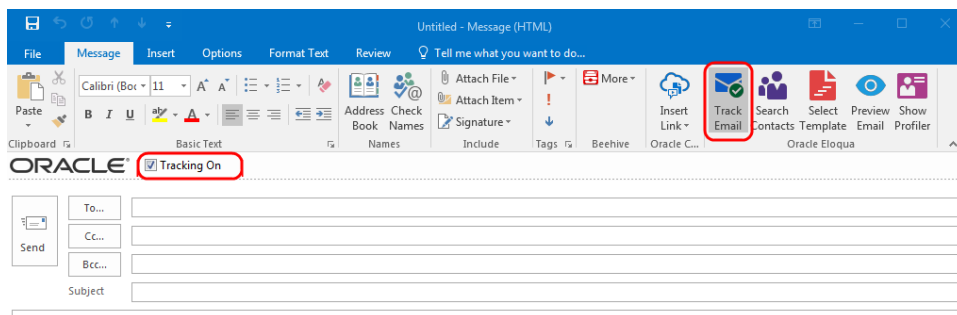
Use Oracle Eloqua Sales Tools for Microsoft Outlook to send a tracked email directly through Microsoft Outlook. Eloqua is called so that sent messages are created and displayed in Engage's sent list for sales users to review and track. Email activity is created for each recipient.

## Prerequisites

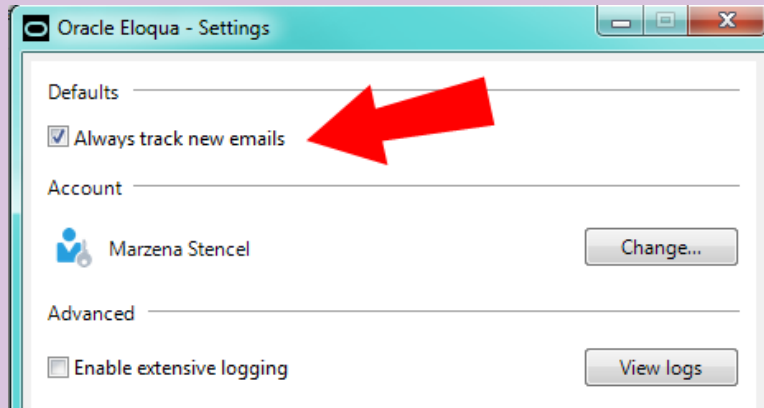
- Oracle Eloqua Sales Tools for Microsoft Outlook must be [installed](#).
- An [Engage](#) license is required. [Profiler](#) is supported but a Profiler license is not required to use the add-in.

## 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.

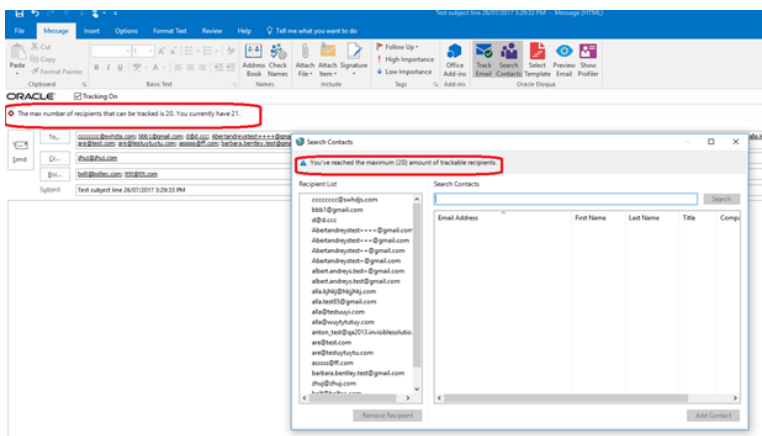


👍 **Tip:** To automatically track all emails, in the main ribbon, navigate to **Options > Settings** and check **Always track new emails**.



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

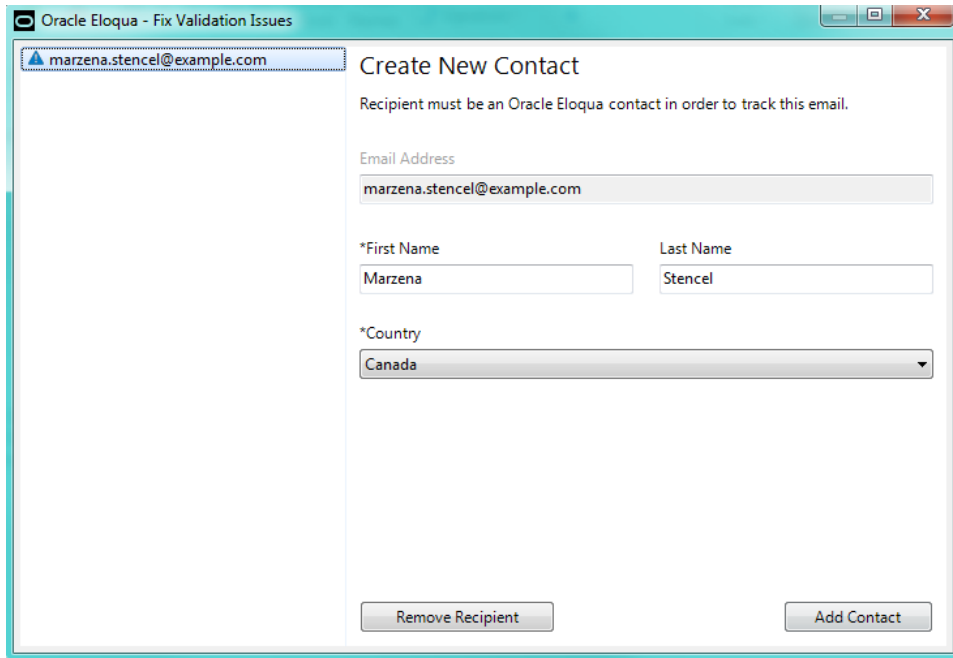
**i Important:** The maximum number of recipients that can be tracked is 100.



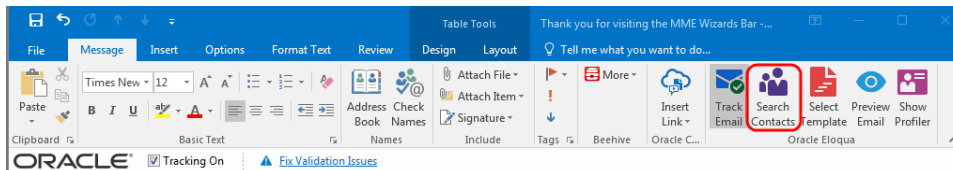
- The add-in automatically verifies if manually entered recipients are Oracle Eloqua contacts. If they are not contacts, a *Fix Validation Issues* link is displayed. Click the link to add them as contacts



before sending the email. You can also remove the recipients if you do not want to add them as contacts.



- To search for Oracle Eloqua contacts, click **Search Contacts** in the ribbon.

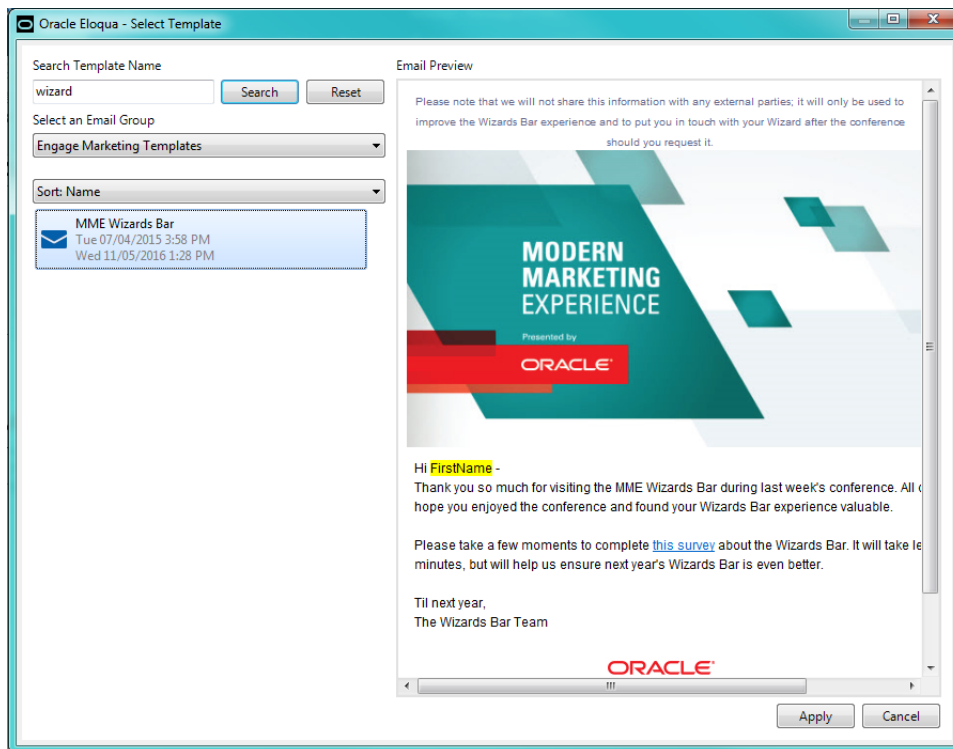


Search contacts by name or email address. Using Microsoft Outlook's standard contact search (by clicking *To...* or *Cc...*) will not search Oracle Eloqua contacts. Click **Add Contact** to add them to your recipient list. At least 3 characters must be specified to search.

**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.

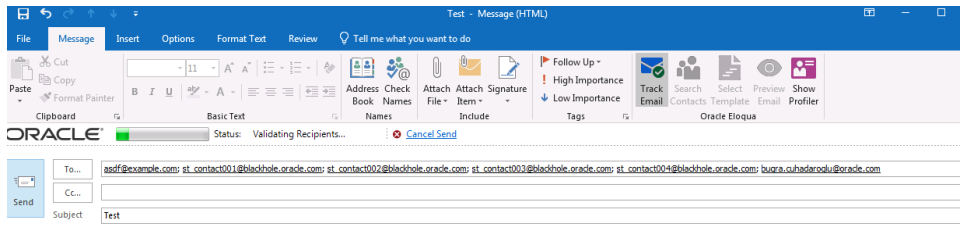
- To select a template, click **Select Template** in the email ribbon. You can search templates by its name. At least three characters must be specified to search. Narrow the search by selecting specific email groups. Sort templates by name, creation date, or modified date. Click **Apply** to use the selected template in your email and override the current subject and body content (if any) of your email.



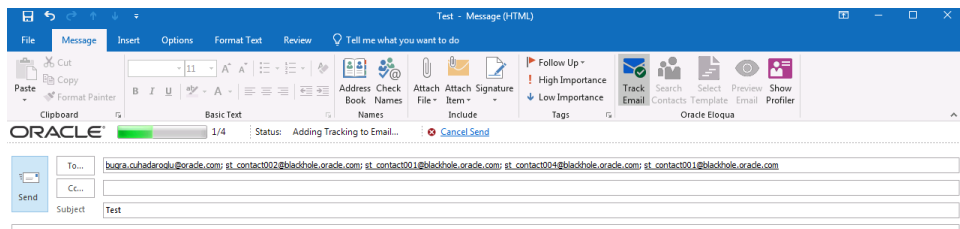
**Note:** Templates with Cloud Content cannot be used but they are still searchable. The *Apply* button will be disabled when these templates are selected.

- 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.

# 10 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	<p>The number of times an email was opened. This includes multiple opens by the original recipient or forwarded recipient.</p> <p>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 <a href="#">Calculating email opens</a>.</p>
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.

# 11 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.

# 12 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.

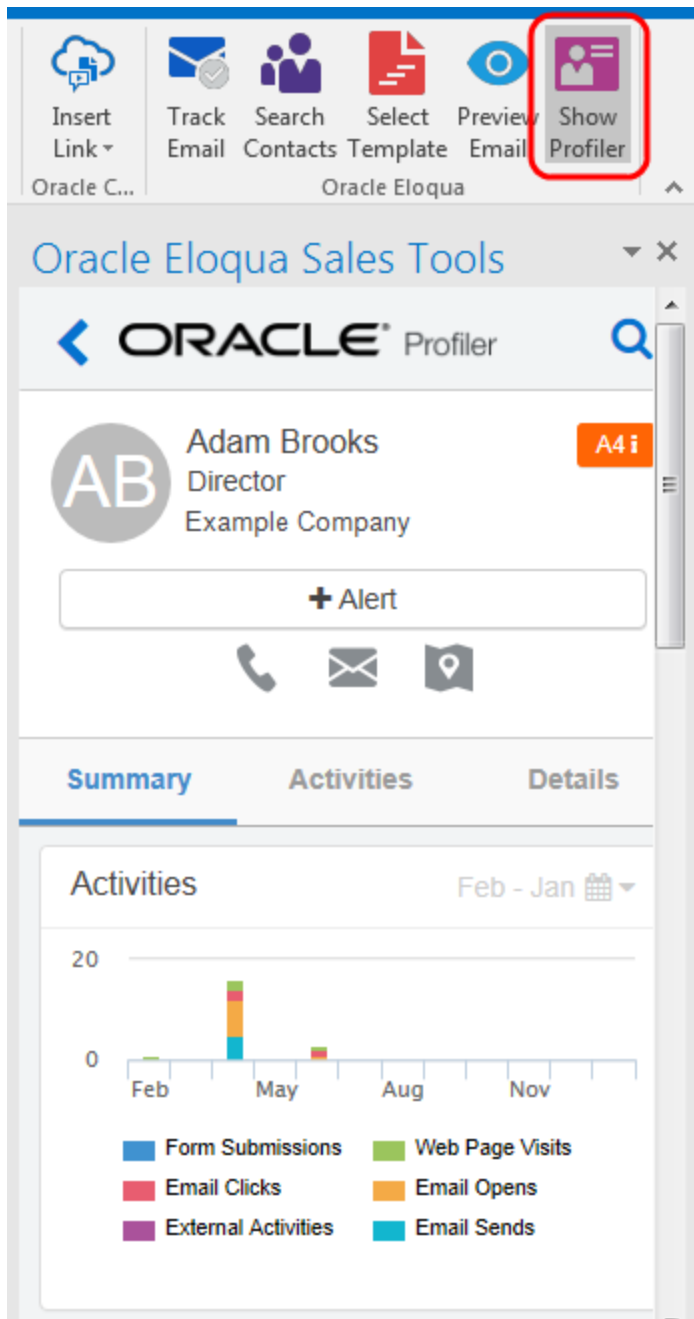
## Prerequisites

- 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.



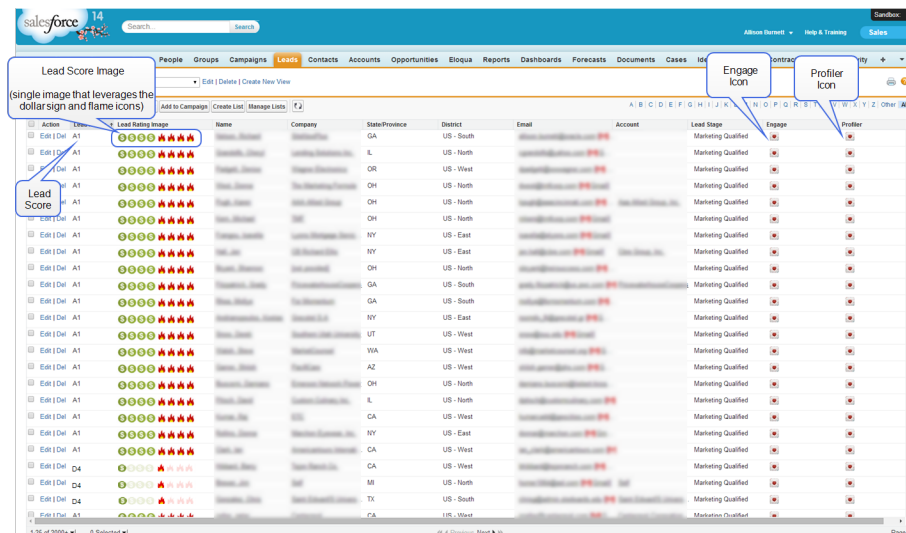
# 13 Sales prioritization views

You can integrate with your CRM in a way that provides your sales team with a prioritized lead list or contact calling list. Optionally, you can include links to Oracle Eloqua Engage and Profiler.

Learn more about how to [configure sales prioritization views in Salesforce.com](#).

## 13.1 Configuring sales prioritization views in Salesforce.com

This guide describes how you can create a lead or contact calling list for your sales team in Salesforce, allowing them to prioritize by lead score and other criteria. Optionally, you can include links to Oracle Eloqua Engage and Profiler.



### Configuration prerequisites

- Salesforce administrator privileges
- CRM integration is set up in your Salesforce instance
- The Lead Score property from Eloqua has been synchronized to a property in Salesforce


## 13.1.1 Configuration

The configuration requires the completion of the following high level steps:

1. [Create the properties.](#)
2. [Create the view.](#)

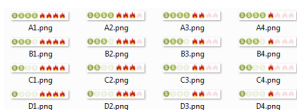
### Creating the properties

This configuration involves creating new properties in Salesforce to show the Lead Score Images. These images (typically composed of *dollar sign* and *flame* icons) appear inside the Salesforce View and link users to Profiler and Engage. There will be a total of 16 images (A1, A2, A3, A4, B1, B2, B3, B4, C1, C2, C3, C4, D1, D2, D3, D4).

 **Note:** The only required property is the **Lead Score** property, which is a prerequisite for this configuration. The properties below are optional, but provide visual cues and a better user experience.

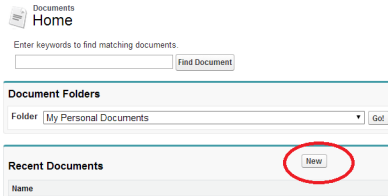
### To create the optional properties:

1. *(Optional)* Create the Lead Score Image property:
  - a. Create the 16 different lead score images or [download the example images](#). For example:



- b. Upload the 16 images to Salesforce.

- i. Inside Salesforce, navigate to **Documents**.
- ii. Click **New** to create a new document.



- iii. Upload the image and then Save.
  - iv. Open the document and click **View File**. The image opens in a new tab.
  - v. Copy the URL from your browser address bar into a document or spreadsheet so you can reference it later. Note: This is the URL to the image. You will need these image URLs later.
  - vi. Repeat for each flame and dollar sign image.
- c. Create a new field to lookup the appropriate image based off the lead score rating value. In other words, if the lead score is A1, then we want Salesforce to display the A1 image.
- i. Inside Salesforce, navigate to **Setup > Leads > Fields**.
  - ii. Create a New Custom Field.
  - iii. Step 1: Choose the Field Type. Select Formula.
  - iv. Step 2: Choose output type. Select Text
  - v. Step 3: Custom Field Definition Edit. Insert the following code, with your own data substituted for the information highlighted below:

```
IMAGE (
CASE ( <API Name for Lead Scoring Field> ,
"A1" , "<A1ImageURL>" ,
"A2" , "<A2ImageURL>" ,
"A3" , "<A3ImageURL>" ,
```

```

"A4", "<A4 ImageURL>",
"B1", "<B1 ImageURL>",
"B2", "<B2 ImageURL>",
"B3", "<B3 ImageURL>",
"B4", "<B4 ImageURL>",
"C1", "<C1 ImageURL>",
"C2", "<C2 ImageURL>",
"C3", "<C3 ImageURL>",
"C4", "<C4 ImageURL>",
"D1", "<D1 ImageURL>",
"D2", "<D2 ImageURL>",
"D3", "<D3 ImageURL>",
"D4", "<D4 ImageURL>",

"/s.gif"),
"Lead Rating")

```


- vi. Step 4: Establish field-level Security. Select which profilers get access to this field.
- vii. Step 5: Add to page layouts. Select the page layouts that this field will show up in
- viii. Save

Here is an example:

```


IMAGE(
CASE( LS Lead Rating_c ,
"A1", "https://c.cs2.content.force.com/servlet/servlet.FileDownload?file=015R0000000I1lM",
"A2", "https://c.cs2.content.force.com/servlet/servlet.FileDownload?file=015R0000000I1lR",
"A3", "https://c.cs2.content.force.com/servlet/servlet.FileDownload?file=015R0000000IdEn",
"A4", "https://c.cs2.content.force.com/servlet/servlet.FileDownload?file=015R0000000IdEs",
"B1", "https://c.cs2.content.force.com/servlet/servlet.FileDownload?file=015R0000000IdEx",
"B2", "https://c.cs2.content.force.com/servlet/servlet.FileDownload?file=015R0000000IdF2",
"B3", "https://c.cs2.content.force.com/servlet/servlet.FileDownload?file=015R0000000IdF7",
"B4", "https://c.cs2.content.force.com/servlet/servlet.FileDownload?file=015R0000000IdFC",
"C1", "https://c.cs2.content.force.com/servlet/servlet.FileDownload?file=015R0000000Id8p",
"C2", "https://c.cs2.content.force.com/servlet/servlet.FileDownload?file=015R0000000IdFH",
"C3", "https://c.cs2.content.force.com/servlet/servlet.FileDownload?file=015R0000000IdFI",
"C4", "https://c.cs2.content.force.com/servlet/servlet.FileDownload?file=015R0000000IdFM",
"D1", "https://c.cs2.content.force.com/servlet/servlet.FileDownload?file=015R0000000IdFR",
"D2", "https://c.cs2.content.force.com/servlet/servlet.FileDownload?file=015R0000000IdFW",
"D3", "https://c.cs2.content.force.com/servlet/servlet.FileDownload?file=015R0000000IdFb",
"D4", "https://c.cs2.content.force.com/servlet/servlet.FileDownload?file=015R0000000Id8k",
"/s.gif"),
"Lead Rating")

```

 **Note:** Your image URLs and Lead Scoring API name will differ from the example shown above.


2. (Optional) Create a property to link to Engage:

- a. Create and store the Engage icon inside Salesforce.
  - i. Inside Salesforce, navigate to **Documents**.
  - ii. Create a New document.
  - iii. Upload the Engage icon and then Save.
  - iv. Open the document and click **View File**. The image opens in a new tab.
  - v. Copy the URL in the address bar. Note: This is the URL to the image. You will need the image URLs later.
  - vi. Copy the URL from your browser address bar into a document or spreadsheet so you can reference it later. Note: This is the URL to the image. You will need this image URL later.
- b. Create a new field that displays the Engage icon, by performing the following steps:

 **Note:** The icon will contain a hyperlink to Engage, with the lead's email address populated in the To field. Alternatively, the URL could take the sales rep to a specific engage template.

- i. Inside Salesforce, navigate to **Setup > Leads > Fields**.
- ii. Create a New Custom Field.
- iii. Step 1: Choose the Field Type. Select Formula.
- iv. Step 2: Choose output type. Select Text
- v. Step 3: Custom Field Definition Edit. Insert the following code, with your own data substituted for the information highlighted below:

```
HYPERLINK("<Login URL>&Url=/apps/engage?sendTemplateEmailToContacts/" & Email,  
IMAGE("<EngageIconURL>", ""))
```

 **Note:** Specify the URL that you typically use to access (i.e. login to) Engage.

- vi. Step 4: Establish field-level Security. Select which profilers get access to this field.
- vii. Step 5: Add to page layouts. Select the page layouts that this field will show up in.
- viii. Save.

3. (Optional) Create a property to link to Profiler:

a. Create and store the Profiler icon inside Salesforce:

- i. Inside Salesforce, navigate to Documents.
- ii. Create a New Document.
- iii. Upload the profiler image and then Save.
- iv. Open the document and click **View File**.

The image opens in a new tab.


- v. Copy the URL from your browser address bar into a document or spreadsheet so you can reference it later. Note: This is the URL to the image. You will use this image URL later.

b. Create a new field which will show the Profiler icon with a hyperlink to the specific profiler for that contact:

- i. Inside Salesforce, navigate to **Setup > Leads > Fields**.
- ii. Create a New Custom Field.
- iii. Step 1: Choose the Field Type. Select Formula.
- iv. Step 2: Choose output type. Select Text

- v. Step 3: Custom Field Definition Edit. Insert the following code, with your own data substituted for the information highlighted below:

```
HYPERLINK("<LoginURL>/apps/salesTools/profiler/contacts?emailAddress=" & Email , IMAGE("<ProfilerImageURL>", " "))
```

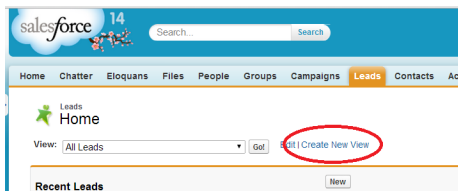
 **Note:** Specify the URL that you typically use to access (i.e. login to) Profiler.

- vi. Step 4: Establish field-level Security. Select which profilers have access to this field.
- vii. Step 5: Add to page layouts. Select the page layouts that this field will show up in.
- viii. Save.

## Creating the View

This section is about creating a View on the Lead tab which will show a list of all the leads sorted by the lead score.

1. Inside Salesforce, navigate to the **Leads** tab.
2. Click **Create New View**.



3. Specify a meaningful name for your new view.
4. Specify Filter Criteria - Filter the view.

### Filter By Owner

The view can show all leads, my leads or leads in a specific queue. “My Converted Leads” will show all the leads that are assigned to the user that is currently logged in. Only one view is needed instead of creating a view for each user.

## Filter by Additional Fields

The lead score value occasionally can be empty or invalid. Therefore, by default, filter out the following:

- Lead Score not equal to “”
- Lead Score not equal to “A”

In addition, filter out any custom property. For example: Region, Territory, State, and so on

### 5. Select Fields to Display - Add fields that will appear in the view.

Add the fields that will appear in the field, at a minimum add in Lead Score, and Name of the contact. Make sure you add all of the optional fields that you created in the [Creating Properties](#) section.


The screenshot displays the Oracle CRM View Configuration interface, which is divided into four main steps:

- Step 1. Enter View Name:** This section includes fields for 'View Name' (set to 'Allison\_Leads\_All') and 'View Unique Name' (set to 'Allison\_Leads\_All'). It also shows the creator 'Allison Burnett' and the creation/modification dates.
- Step 2. Specify Filter Criteria:** This section allows for filtering by owner (with 'All Unconverted Leads' selected) and by campaign. It also features a table for 'Filter By Additional Fields (Optional)' with columns for Field, Operator, and Value. The table currently has two entries: 'Lead Rating' with operator 'not equal to' and value 'A', and another 'Lead Rating' entry with operator 'not equal to' and value 'A'. There are also four empty rows for additional filters.
- Step 3. Select Fields to Display:** This section shows two columns: 'Available Fields' and 'Selected Fields'. The 'Available Fields' list includes Salutation, Last Name, First Name, Lead Record Type, Title, Website, Phone, Mobile, Fax, Street, City, Zip/Postal Code, Country, Lead Source, and Lead Status. The 'Selected Fields' list includes Lead Rating, Lead Rating Image, Name, Company, State/Province, District, Email, Account, Lead Stage, Engage, and Profiler. There are 'Add', 'Remove', 'Top', 'Up', 'Down', and 'Bottom' buttons for managing the selected fields.
- Step 4. Restrict Visibility:** This section has three radio button options: 'Visible only to me' (selected), 'Visible to all users (Includes partner and customer portal users)', and 'Visible to certain groups of users'.

### 6. Save the view.



7. Sort on *Lead Score* by clicking the heading of the column inside the view.

 **Note:** You can configure the same view on the contacts tab by adding the same properties to the Contact object and then creating the same view on the *Contacts* tab.