Oracle Eloqua Engage

User Guide
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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.
Compose

Breakfast invi

Marzena Stencil

Breakfast invitation

Font  Size

FontSize

Acme Breakfast Series

FirstName

You won't want to skip breakfast on March 5th!

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 5
The Ritz, London
120 Entrance
What's in it for the marketing side of the house?

- Create your "sales-emails" in the same place you create your regular marketing campaign emails.
- Control the marketing content your sales team sends out to their prospects.
- When sales adds a new contact on the fly, it is synchronized with Eloqua and your CRM.
- Emails sent through Engage are recorded in Eloqua and within the CRM and Profiler on the contact record.

Learn more by watching this video: https://www.youtube.com/playlist?list=PLw7GyH-Hj8cN_oEV8epjsq-PB0uRUOC4E
**Note:** Before you can access the responsive version of Engage, it must be installed in your Eloqua instance. Once installed, the customer administrator can customize the options that appear to those using the program. Learn more about installing and configuring Engage.
Steps to setup Engage

Setting up Engage involves installation, configuration, user setup, and email template design. Use the table below to help guide you through the setup process.

<table>
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<tr>
<th>Step</th>
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<tr>
<td>Installing Engage</td>
<td>Install the Engage app in your instance. A customer administrator should perform the install. See Installing Engage.</td>
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</table>
| Configuring the Engage app | Configure the Engage app for your organization’s needs. You can configure settings like:  
  - How many recipients can be added to an email and whether to limit the number of sends to an individual contact.  
  - What controls users have access to in the Engage email editor.  
  - Override the default sender address for all Engage emails.  
  See Configuring Engage. |
| Setting up Engage users | To use Engage, users must have the Engage license and appropriate asset permissions. We recommend assigning Engage users to the following security groups:  
  - Engage Users  
  - Active Users Sales  
These groups ensure license assignment and that View |
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<tr>
<td></td>
<td>permissions are granted to appropriate assets. To use an email template, Engage users must have view access to view all assets associated with the template:</td>
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<tr>
<td></td>
<td>• Email template, template headers and footers</td>
</tr>
<tr>
<td></td>
<td>• Any landing page or associated form referenced by an email template</td>
</tr>
<tr>
<td></td>
<td>• Cascading asset permissions from there may also be required - for example, assets referenced by form processing rules</td>
</tr>
<tr>
<td></td>
<td>The security groups above are by default configured with all appropriate assets. If you make customizations to security groups, consider the impact to the security groups assigned to Engage users. Learn more about security groups.</td>
</tr>
<tr>
<td></td>
<td>Engage users can be</td>
</tr>
<tr>
<td></td>
<td>• Imported from your CRM and assigned appropriate security groups. See Creating user imports using the Salesforce Integration app or Creating user imports using the Oracle CX Sales Integration app.</td>
</tr>
<tr>
<td></td>
<td>• Set up manually. See Creating individual users or Uploading multiple user accounts.</td>
</tr>
<tr>
<td>Allowing Engage users to create contacts</td>
<td>By default, Engage users cannot create new Eloqua contacts. If you want to allow users to create contacts,</td>
</tr>
<tr>
<td>Step</td>
<td>Description</td>
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<tr>
<td></td>
<td>grant users the Manage Contacts action permission. See action permissions. You should then also ensure the Engage users have access to the appropriate contact views. See Configuring Eloqua contact views in Sales Tools.</td>
</tr>
<tr>
<td>Setting up email group access</td>
<td>Email templates are made available to Engage users based on email group access. If the Engage user has access to the group, they can access emails assigned to that group.</td>
</tr>
<tr>
<td></td>
<td>In addition, if you allow Engage users to create their own templates for sharing with other Engage users, they can choose the email group for that email.</td>
</tr>
<tr>
<td></td>
<td>See Making a template available in Engage and Email groups.</td>
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<tr>
<td>Creating Engage templates</td>
<td>Now you can create your Engage templates. Make sure templates are assigned to the correct email group from the previous step. Additionally, Engage users must have view access to the email and any assets referenced in the email (landing page, form, custom object, etc.)</td>
</tr>
<tr>
<td></td>
<td>See Making a template available in Engage.</td>
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<tr>
<td>Creating signature layouts</td>
<td>If you want Engage emails to use a standard signature,</td>
</tr>
<tr>
<td>Step</td>
<td>Description</td>
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<td>-----------------------------</td>
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<tr>
<td></td>
<td>setup and configure the signature layouts. You can add the signature layout to Engage templates, and they are also available from the Engage email toolbar. Engage users must have view access to use the signature layout. See Signature layouts.</td>
</tr>
<tr>
<td></td>
<td>If you allow Engage users to send personal emails (blank emails), they can also set up their own signature using the Engage app. See Creating an email signature.</td>
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<tr>
<td>Testing Engage templates</td>
<td>It is important to test the Engage templates you’ve set up as if you were an Engage user. Consider setting up a test Engage user in Eloqua with the same configuration as a Engage user. Use this user account to do all of your Engage testing.</td>
</tr>
<tr>
<td>Accessing Engage</td>
<td>Work with your sales organization to determine the best method for accessing Engage.</td>
</tr>
<tr>
<td></td>
<td>• Integrate Engage with your CRM</td>
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<tr>
<td></td>
<td>This would allow sales users to access engage directly from the CRM. You can embed Engage as a tab, link to it as a button, etc. See Engage integration.</td>
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<tr>
<td></td>
<td>• Use the Sales Tools for Microsoft Outlook add-in</td>
</tr>
<tr>
<td></td>
<td>This is an add-in that your users can install on their own or your IT department can deploy to an entire organization. See Oracle Eloqua Sales Tools for Microsoft Outlook.</td>
</tr>
<tr>
<td>Step</td>
<td>Description</td>
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</tr>
<tr>
<td>Direct link</td>
<td>This is a customizable link you can use to launch Engage directly.</td>
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<td></td>
<td>Learn about the URL structure for access engage and the optional parameters that can be used to open a specific template, recipient, and so on. See Accessing Engage.</td>
</tr>
<tr>
<td>Onboard Engage users</td>
<td>Now you can onboard your Engage users. Be sure to give them an overview of the tool, templates, and appropriate usage guidelines from your organization. Also considering how you will share templates with users going forward.</td>
</tr>
<tr>
<td>Report and monitor</td>
<td>After sales reps start using Engage, you can use Insight reports to monitor template performance and overall usage.</td>
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<tr>
<td></td>
<td>Start with these reports available from the Insight catalog:</td>
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<tr>
<td></td>
<td>• Sales Email Overview report</td>
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<tr>
<td></td>
<td>• Sales Email Template Usage report</td>
</tr>
<tr>
<td></td>
<td>• Sales Email Opens and Website Visits report</td>
</tr>
<tr>
<td></td>
<td>Sales reps can also review the performance for their sent messages. Refer to the following topics for more information:</td>
</tr>
<tr>
<td>Step</td>
<td>Description</td>
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<td>------</td>
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</tr>
<tr>
<td></td>
<td>• Engage reports</td>
</tr>
<tr>
<td></td>
<td>• Viewing email performance using Microsoft Outlook</td>
</tr>
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</table>

Making a template available in Engage

Engage integration
Installing Engage

Before you can use Engage, a user with client administrator rights must install the app and configure the settings for your Oracle Eloqua instance.

**Important:** The installation process must be done from a user account with customer administrator rights. Because deleting or deactivating the installer user account will impact installed apps, we recommend installing apps using an account that is not tied to a specific person. Learn more about the steps to setup Engage.

**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.
   
   **Settings**
   
   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. The highest maximum number you can enter for this field is 2,000.
  
  - **Enable contact send limit**: Limit the number of sales emails that your reps can send to the same contact over a period of time. For example, if you enable the option today, with the number of days set to 7 and the send limit set to 1, Eloqua will look back at the last 7 days to determine if there has been 1 email sent out to a given contact from Engage. If no email has been sent out over the last 7 days, the sales rep will be able to send one email to that contact. These limits can help you prevent contact fatigue and unsubscribes, which also helps maintain your domain’s reputation.

    ⚠️ Tip: Send limits apply to both Engage and Oracle Eloqua Sales Tools for Microsoft Outlook and apply to all sales users.

• **Email Settings**

  In the **Email Settings** section, you can standardize the sender display name and from address of all emails sent from Engage.

  By default, Engage sends emails using the user’s first name, last name, and email address. Using the **Email Settings**, you can change these defaults and have all Engage emails sent with the same sender display name and from address.
Consider using these settings if you want to help the sales team with their email branding, and help your sender reputation. A best practice for a strong sender reputation is matching the from address to the return path. These settings allow you to do this.

The reply-to address for Engage emails is always the email address of the Engage user. For example, when John Smith sends an Engage email, John's email address is used when a contact replies to the email.

**Note:** These settings should match the values configured within the *Email Defaults* settings page. Only change these settings if you have access to these settings. Learn more about email defaults.

- **Customize how emails are sent from Engage:** Check this box to customize two fields: *Sender display name* and *From address*.
  - **Sender display name**: All emails sent from Engage will display this sender name to recipients. For example, if you enter the value *Company Name*, recipients will see *Company Name* for the sender name when John Smith sends an Engage email. If you leave this value blank, Engage will continue to use the user's information (for example, John Smith).
  - **From address**: All emails sent from Engage will display this from address to recipients. For example, if you enter the value `products@companyname.example.com`, recipients will see `products@companyname.example.com` for the from address when John Smith sends an email.

**Tip:** If you enable this setting, be sure to review your signature layouts for any necessary changes. Learn more about signature layouts.

- **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**.

**Allowed Domains**

Identify which domains are allowed to host Sales Tools pages. For example, if you embed Sales Tools in an iframe hosted by your CRM, add the domain of the page hosting the iframe to your allowlist. You can allow a domain and its sub-domains using a wildcard (*). Learn more about Engage integration.

To avoid broken iframes, add your CRMs to the Profiler allowlist and Engage allowlist, and update the Sales Tools URLs you have embedded in an iframe to the new URLs. Here is a list of suggested domains for the allowlist based on CRMs:

- **Oracle CX Sales:** *.oraclecloud.com
- **Oracle CRM On Demand:** *.crmondemand.com
- **Microsoft Dynamics:** *.dynamics.com

To learn more about embedding Engage in different CRMs, see Engage integration.

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. All existing assets, configurations and history are preserved when you reinstall an app. Also, you can choose to delete an app by clicking the Uninstall 🗑️. In this case, all current assets, configurations, and history are permanently deleted.
Accessing Engage

**Note:** Before your users 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.

You can use the following links to give your users access to Engage:

- **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-character company name. You can obtain your company’s login prefix in Eloqua by navigating to Settings > Display Preferences > Company Defaults.
Engage URL parameters

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:


- 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 Edge or Sales Tools for Microsoft Outlook 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 the 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.

**Embedding Engage pages**

You can embed Engage pages into an iframe, allowing your users to access Engage directly from other apps at your organization. For example, embed Engage directly into your CRM.

When embedding Engage pages, the URL structure changes to:

[/apps/embed/salesTools]

To learn more about embedding Engage in different CRMs, see Engage integration.
Configuring Engage

Manage how your users can use Engage by configuring the Engage app.

**Before you begin:**

- You must be a customer administrator to configuration the Engage app.

**To configure 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. Configure the settings as needed.

**Settings**

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. The highest maximum number you can enter for this field is 2,000.
  - **Enable contact send limit**: Limit the number of sales emails that your reps can send to the same contact over a period of time. For example, if you enable the option today, with the number of days set to 7 and the send limit set to 1, Eloqua will look back at the last 7 days to determine if there has been 1 email sent out to a given contact from Engage. If no email has been sent out over the last 7 days, the sales rep will be able to send one email to that contact. These limits can help you prevent contact fatigue and unsubscribes, which also helps maintain your domain’s reputation.

**Tip**: Send limits apply to both Engage and Oracle Eloqua Sales Tools for Microsoft Outlook. and apply to all sales users.
• **Email Settings**

In the *Email Settings* section, you can standardize the sender display name and from address of all emails sent from Engage.

By default, Engage sends emails using the user's first name, last name, and email address. Using the *Email Settings*, you can change these defaults and have all Engage emails sent with the same sender display name and from address.

Consider using these settings if you want to help the sales team with their email branding, and help your sender reputation. A best practice for a strong sender reputation is matching the from address to the return path. These settings allow you to do this.

The reply-to address for Engage emails is always the email address of the Engage user. For example, when John Smith sends an Engage email, John's email address is used when a contact replies to the email.

**Note:** These settings should match the values configured within the *Email Defaults* settings page. Only change these settings if you have access to these settings. Learn more about email defaults.

• **Customize how emails are sent from Engage:** Check this box to customize two fields: *Sender display name* and *From address*.
  
  • **Sender display name:** All emails sent from Engage will display this sender name to recipients. For example, if you enter the value *Company Name*, recipients will see *Company Name* for the sender name when John Smith sends an Engage email. If you leave this value blank, Engage will continue to use the user's information (for example, John Smith).
  
  • **From address:** All emails sent from Engage will display this from address to recipients. For example, if you enter the value `products@companyname.example.com`, recipients will see `products@companyname.example.com` for the from address when John Smith sends an email.

**Tip:** If you enable this setting, be sure to review your signature layouts for any necessary changes. Learn more about signature layouts.
• **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**.

**Allowed Domains**

Identify which domains are allowed to host Sales Tools pages. For example, if you embed Sales Tools in an iframe hosted by your CRM, add the domain of the page hosting the iframe to your
allowlist. You can allow a domain and its sub-domains using a wildcard (*). Learn more about Engage integration.

To avoid broken iframes, add your CRMs to the Profiler allowlist and Engage allowlist, and update the Sales Tools URLs you have embedded in an iframe to the new URLs. Here is a list of suggested domains for the allowlist based on CRMs:

- **Oracle CX Sales**: *.oraclecloud.com
- **Oracle CRM On Demand**: *.crmondemand.com
- **Microsoft Dynamics**: *.dynamics.com

To learn more about embedding Engage in different CRMs, see Engage integration.

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

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

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 Configuring Engage.

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

1. Open Engage.

2. Click Compose.

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

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

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

**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.
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.

- When you include multiple people in an Engage send, each person receives the email individually and will not be aware of other recipients. This enables Eloqua to track each recipient's engagement with the email.

6. Enter the email subject.

7. Preview your email.

8. (Optional) Save your email.

9. Click **Send**.

   - If you entered any email addresses for new contacts that do not already exist in Oracle Eloqua, the **Create Contact** popup appears. You need to complete all required contact fields (marked with an asterisk).
**Important:** Field merges can cause incorrect values in email sent from Engage if the corresponding contact fields for individual contacts are blank or contain default values such as **First Name**. Best practice is to populate all fields for which you have accurate information.

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

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

**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.

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 drop-down or remove the email group label. Learn more about managing email groups.
Emails must have appropriate permissions set to be available in Engage. Learn how to make emails available in Engage.

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

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

   - Editing differs between responsive and non-responsive emails. Responsive emails dynamically scale depending on the size of the screen they are viewed on. They are ideal for tablets and mobile viewing. Non-responsive emails scale in smaller screens.
• Content you can change is outlined in green and marked with an edit icon. Content you cannot change is locked. Locked content is outlined in gray, is marked with a lock icon, and is locked.
based on the configuration of email groups, email templates, and Engage settings.
• Field merges can be easily identified. They are highlighted in yellow throughout your email, including the Subject line. If needed, you can delete merged fields from the Subject line. If field merges in the body of the email template are protected, you cannot edit them. The values of these fields are displayed when you preview your email.

7. Enter the email recipients in the To line.

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

**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.
• When you include multiple people in an Engage send, each person receives the email individually and will not be aware of other recipients. This enables Eloqua to track each recipients engagement with the email.

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.

11. Click Send.

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

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

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

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

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

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

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

**Note:** You cannot schedule the sending of email from Engage.
Making a template available in Engage

You can create email templates that sales users can access and send in Engage. Sales users are given access to email groups, and any email assigned to the email group will be accessible as a template in Engage.

Before you begin:

- Verify and adjust permissions. To use the template, Engage users must have access to the email group and View asset permissions. Engage also requires View permissions for any landing page, form, or assets used in form processing steps such as custom objects.

- Enable customized content. Administrators can allow the sales user to: create emails without templates, create their own templates, and add content to the email such as images, attachments and field merges (contact field merges only). For more information, see Configuring Engage.

- Test the template. Microsoft Outlook renders the email differently than the Eloqua email editor. If your sales team uses Oracle Eloqua Sales Tools for Microsoft Outlook, test your email template using the add-in. The following email editor features are not supported in the Microsoft Outlook add-in: Locked Blocks, Hide in Mobile, protected email templates. Be sure to test your template before providing it to Engage users.

- Consider protected templates. To prevent users from changing parts of the email message, create a protected marketing email template. Protected email templates are not supported in the Microsoft Outlook add-in.

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.
   
   
   ![Email Group Management Image]
   
   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.

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
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.

Creating Engage templates

You can create a template in Engage so that you can reuse an email you've customized or share new templates with other Engage users.

Before you begin:

- Marketing administrators must configure Engage to allow the creation of personal templates. Learn more about Configuring Engage
- You must have asset creation permissions to create new templates in Engage
- If you choose to share your template, it will be available to all Engage users based on the selected Email Group
- Your template will also be available in Oracle Eloqua as a new email asset. You can find it in this folder: `engage-personal-folder-{userId}-{username}`

To create an Engage template:

1. In Engage with your email open in the editor, click Save As or Save.
2. 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.
Tip: Email groups determine default settings for the email such as headers and footers. Groups are also used as a contact subscription option. When sharing templates, Engage users with access to this Email Group will be able to access the email template.

3. Click **Save**. The email is saved in the email chooser in the root folder under a user-specific folder: `engage-personal-folder-{userId}-{username}`. After you finish, you can also delete duplicate or unnecessary email templates by selecting **Delete**. You must have appropriate asset permissions to delete email templates.

Adding hyperlinks to Engage emails

You can insert hyperlinks in your Engage emails. A hyperlink can route your clients to a landing page, a file, a web page, a system action, or a pre-addressed email that they can fill out and send. You can also modify existing hyperlinks in your emails, as long as the content is not locked.
Hyperlinks in your Engage emails are automatically tracked. Clicking the hyperlink during preview or while viewing the sent history will not add to your tracking data. Learn more about link tracking.

To add a hyperlink to an email:

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

2. Select the text that you want to use as a hyperlink, then click Hyperlink in the toolbar. If you do not select text, the hyperlink will be inserted where your cursor is placed.
3. Enter the URL you want to route your recipients to. You can also modify the text you want the recipient to see.
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.

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.

- Accepted image file formats include GIF, JPG, JPEG, and PNG.

**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 Design Editor 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, and PNG. 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.
   c. Click OK. The OK button is only enabled once text is entered in the URL field.

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.
Adding field merges to Engage emails

If you can create a blank email or edit the email template you are using, you can add contact field merges to the email. For example, personalize your email with the recipient’s name or company by using a field merge. When you send the email, Eloqua pulls in the field merge data from the contact record.

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.
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.

**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.

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.
You won't want to skip breakfast on March 5th!

Join us at theSwanky 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 RSVP.

March 5
The Ritz, London
120 Piccadilly
Check in: 9:45 am
Breakfast: 9:00 - 10:30 am
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.

**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.

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.

6. Click **Save**.

**Troubleshooting Engage Issues**

When sending emails from Engage, it is possible that you encounter errors. Learn about possible Engage send errors and how to resolve them.

**Global unsubscribes**

If a contact has unsubscribed from receiving emails from the company, they are known to be globally unsubscribed. This information will also show on the contact's record. In that case, the email address will be within a red box in the address bar and a red banner will appear immediately informing you that the recipient is globally unsubscribed.
Resolving this issue

In this case, the contact does not want to hear from the brand and you will not be able to email them at all. You could use Profiler to identify alternate methods to reach out to this contact.

Group unsubscribes

Contacts can unsubscribe from certain types of marketing emails identified by an email group. For example, an email group can be included in your organization's superscription center, allowing contacts to subscribe to the types of email they want to receive. To find out if you are sending a particular email to a contact that is unsubscribed to an email group, type their email address in the address bar and click send. When you click send, a red banner on top of the address bar will appear alerting you that the recipient is unsubscribed to an email group.

Resolving this issue

Since they have unsubscribed from that email group, you cannot send the particular email to them. The goal of email group subscriptions is to make it easier for your contacts to identify what they are interested in and keep them engaged with your organization. To avoid global unsubscribes, it is important to respect a contact's preferences.

To resolve this issue, you can change the email template or change to a blank email if this has been enabled by your administrator. Since the contact does not want to receive emails regarding that topic or that template of information, you could change the template and send them that.
Bouncebacks

For an incorrect or bad email address, the email address in the address bar will turn red and a red banner will appear informing you that the recipient has been flagged as a bounceback.

Resolving this issue

In this situation the email address is invalid and cannot be used. You will have to find an alternate way of reaching out to them such as using their number.

Master exclude

In Eloqua, there are some domains of specific organizations that you cannot send email to at all. If you are sending a particular email to a domain that has been blocked, a banner on top of the address bar will appear alerting you that the recipient is on the master exclude list.

Resolving this issue

You cannot resolve this and you will not be able to email that contact or domain through Engage. Use Profiler to identify alternate contact methods.

Recipient limits

Your administrator can configure how many recipients you can add to an email. If you exceed this limit, Engage will give an error notifying you that the maximum number of recipients have been reached. Learn more about Engage app settings.
Adding a large number of recipients to your email can exceed the browser's allowed length of a URL. In these cases you will receive a browser "414 Request - URI Too Large" error.

Resolving this issue

To work around this issue, break up the email and send it in smaller chunks of contacts.

Send limits

Send limits occur when you reach the maximum number of emails that you can send to the same contact in a given period of time. The send limit is configured by your administrator. In this case, after you click send, a red banner will appear at the top of the page indicating the send limit has been reached. In Oracle Eloqua Sales Tools for Microsoft Outlook, reaching the send limit results in an email group error.

Resolving this issue

If you have reached the send limit, you will have to wait for the days within the send limit to email the contact. For example, if your admin set the limit to 2 emails in 7 days, Eloqua is looking back at the last 7 days to determine how many times the contact has been emailed by an Engage user. In this scenario, you would not be able to email the contact until there are less than 2 emails sent in the last 7 days.
**Note:** Engage will not be able to tell you how many days you will have to wait before being able to send an email to that contact again. To find that out, reach out to your administrator.

Emails with plus sign (+)

If the email address you enter has a plus (+) sign in it, the email address will automatically be split into two. You will have to re-enter the email address to resolve.
Viewing email sent history

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

To view email sent history:

1. Navigate to the Engage home page using one of the following methods:
   - Logging in to Engage.
   - Click the Engage icon.
   - Sending an email.

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

   - A green icon indicates the email was sent successfully to all recipients.
   - An orange icon indicates the email was sent successfully to some recipients.
   - A red icon indicates the email was not sent successfully to any recipients.
Click the **Failed Email Sends** button to view emails which did not send.

2. Select an email to view additional details. Explore the different tabs to learn more about your sent email.
Breakfast invitation
Thursday, June 15, 2017 3:47:48 PM
TO: Amy Ngo, Katie Mauti + 1 more

Acme Breakfast Series

First Name:
You won’t want to skip breakfast at March 15!
Join us at the swanky Tate London for breakfast and the latest insights into industry trends and best practices. We’ll have some special top-notch guest speakers that will brain your socks off! Don’t miss out on the action.
Admission is complimentary, but you must RSVP online.

March 15
The Tate, London
150 Piccadilly
Check in: 8:45 am
Breakfast: 9:00 - 10:30 am
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
Breakfast invitation
Thursday, June 15, 2017 3:47:48 PM
TO: Amy Ngo, Katie Mauti + 1 more

Marzena Stencel
CEO

Last Opened: Thu Jun 15 2017 03:49 PM EDT
Breakfast invitation
Thursday, June 15, 2017 3:47:48 PM
TO: Amy Ngo, Katie Mauti + 1 more

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.
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](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).

Engage top templates report

The Engage top templates report provides information about the performance of your templates over a given period. You can reuse the templates that have the best performance.

**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.

<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unique open rate</td>
<td>The unique opens divided by the total number of times an email was delivered. (Unique Opens / Total Delivered)</td>
</tr>
</tbody>
</table>
|                     | A unique open is the number of recipients (original recipients or email forwards) that opened an email at least
<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>once. This does not count all the times that the same recipient opened the email.</td>
</tr>
<tr>
<td></td>
<td>Oracle Eloqua counts an email as opened if the recipient loaded the tracking pixel image contained in the email or clicked a link in the email. Learn more about how email opens are calculated.</td>
</tr>
<tr>
<td>Click-to-open rate</td>
<td>Clicked sends / opened sends. Both clicked sends and opened sends ignore possible forwards. Clicked sends: The first clickthrough by the original recipient. This metric ignores possible forwards. Opened sends: The number of first opens for the emails that were sent. This metric ignores possible forwards.</td>
</tr>
</tbody>
</table>

**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.

**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**.

![Top Templates drop-down](image)

**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.

![Email reports](image)

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.

<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total opens</td>
<td>The number of times an email was opened. This includes multiple opens by the original recipient or forwarded recipient.</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
</tr>
<tr>
<td>-------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Metric</td>
<td>Oracle Eloqua counts an email as opened if the recipient loaded the tracking pixel image contained in the email or clicked a link in the email. For more information, see Calculating email opens.</td>
</tr>
<tr>
<td>Total clicks</td>
<td>The total clickthroughs. This includes multiple clicks by the same recipient. System Action links are not tracked.</td>
</tr>
<tr>
<td>Hard bouncebacks</td>
<td>The total emails that returned a hard bounceback.</td>
</tr>
<tr>
<td></td>
<td>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.</td>
</tr>
</tbody>
</table>

### 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 fileer 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.
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.

Embedding Engage as a subtab in Oracle CX Sales

Important: Oracle CX Sales was formerly known as Oracle Sales Cloud. All instances of Oracle Sales Cloud have been changed to Oracle CX Sales across the app user interface.

To enrich the user experience when working in Oracle CX Sales, you can embed an Engage subtab into standard objects, such as Contacts and Sales Leads. This way, you can allow users to send emails with Engage without having to leave CX Sales.
Prerequisites:

- Build an allowlist of the domains that will be hosting embedded Engage pages. Learn more in the Configuring Engage topic.

- Determine the login method that users will use to access Oracle Eloqua. There are three methods: Auto-login, SAML, or direct. The method you use depends on the security model implemented at your organization. Auto-login and SAML are options that support Single Sign-On (SSO). Direct login is for logging in directly through Eloqua. When embedding pages in your CRM, be sure to use the Eloqua login URL determined by the login method.

There are five steps to creating a Engage subtab in CX Sales:

1. Creating a sandbox
2. Creating mashup content
3. Adding the mashup content to a standard object in CX Sales
4. Configure groovy expression
5. Publishing your sandbox
Step 1: Creating a sandbox

To create a sandbox:

1. Log in to Oracle CX Sales with your Administrator credentials.

2. Click Navigator at the top of the page, and under Configuration click Sandboxes.

3. Click Create Sandbox.

4. Ensure Application Composer is checked as Active, give your sandbox a name, and ensure that Publishable is set to Yes.

5. Click Create and Enter.

You'll be redirected to the Available Sandboxes page.

Step 2: Creating mashup content

To create mashup content:
1. At the top of the page, click **Tools > Application Composer**.

![Tool and Application Composer Interface](image)

2. In the **Overview** section, click **Mashup Content > Register Web Application**. Alternatively, you can click **Mashup Content** in the left-side panel under **Common Setup**.

![Application Composer Interface](image)

3. Configure the following options:
   - Give your web application a name. For example, Eloqua Engage.
   - For **Type**:
     - If using a **Direct URL**, select **Parameter-based**.
     - If using an **Auto-login** or **SAML URL**, select **Groovy expression**.
• If using the Direct URL, for URL definition, enter the following URL:

https://login.eloqua.com/apps/embed/salesTools/engage

• If using the Direct URL, in the URL Parameters section, click Add then add the emailAddress parameter. This way, when you open the subtab, Engage will open the Template Chooser for the email address.

4. Click Save and Close.

Step 3: Adding the mashup content to a standard object

To add the mashup content to a Contact or Sales Lead object:

1. Still in the Application Composer, navigate to the left-side panel under Objects, expand Standard Objects, then expand the object you would like to add your subtab to.
In this topic, we’ll expand the Sales Lead object.

2. Click Pages.

3. In the Application Pages tab, scroll down to the Details Page Layouts section, and click Default Custom Layout.
Note: The Default Custom Layout layout may not be present. If this is the case, select and duplicate an existing layout, for example you can duplicate the Standard layout. You can then edit the duplicate layout.

4. Scroll down and click Add.

5. Select Mashup Content, then click Next.

6. Select your Mashup Content from the Web Applications list, then click Insert.
7. Configure the following options:
   • Give your subtab a name. In this case, you would give it a name related to Engage. For example, you could name the subtab Eloqua Engage.
   • (Optional) Click **Change Icon** to change your subtab’s **Display Icon**.
   • If you’re using the Direct URL, select values for your URL parameters. For Sales Leads, the **Parameter** is `emailAddress`, and the **Value** is *Contact Email*. For Contacts, the **Parameter** is also `emailAddress`, and the **Value** is *Primary Email*.

8. (Optional) Click **Next**. The **Next** option only appears if there are other details page layouts available to add the subtab to.

9. Click **Save and Close**.

10. If using Auto-login or SAML URLs, go directly to **Step 4: Configure groovy expression**.

11. **Done**.

**Step 4: Configure groovy expression**

**Note:** Step 4 only applies if you selected Auto-login or SAML in Step 2.

1. Still in **Sales Lead: Pages > Details Page Layouts > Default Custom Layout**, scroll down and click on your new mashup content’s icon.

**Tip:** Your icon should be right above the **Add** icon.
2. Click the **Edit** icon beside your mashup content's name.

3. In the *Edit Script* text box, insert the following script:

```javascript
if (PrimaryContactEmailAddress != null) {
    return "https://login.eloqua.com/autoLogin?LoginPrefix={prefix}&Url=/apps/embed/salesTools/engage?emailAddress=" + PrimaryContactEmailAddress;
}
```

**Tip**: Replace `{prefix}` in the Auto-login URL and SAML URL with the Login Prefix in Eloqua. To find out your Login Prefix, navigate to **Settings > Display Preferences > Company Defaults**.

You can also add additional query parameters to the URL definition to manage the template used when opening Engage. See **Accessing Engage** to learn more.

**Auto-login**
else {
    return "https://login.eloqua.com/autoLogin?LoginPrefix=
{prefix}&Url=/apps/embed/salesTools/engage";
}

SAML

if (PrimaryContactEmailAddress != null) {
    return
{prefix}&ReturnUrl=/apps/embed/salesTools/engage?emailAddress=" +
PrimaryContactEmailAddress;
}
else {
    return
{prefix}&ReturnUrl=/apps/embed/salesTools/engage";
}

Tip: If you're adding Engage to the Contacts object, replace
PrimaryContactEmailAddress in the above code samples with
PrimaryEmailAddress. Since in this topic we're adding Engage to the Sales Leads
object, we'll keep PrimaryContactEmailAddress in our code.

4. Click **Save and Close**.
Step 5: Publishing your sandbox

1. Click **Sandboxes**, then click on your sandbox’s name.

2. Click **Publish**.

After following these steps for Engage, you can now view the subtab when you navigate to the standard object’s page. For example, since in this topic we created a subtab for the Sales Lead object, we’ll navigate to **Navigator ➤ Leads** under **Sales**. Once you open a lead, you see the Engage subtab.

Troubleshooting

- For Firefox users, if you’re using Autologin or SAML access methods, and you cannot progress past the Eloqua authenticate now login screen, you may have to disable Firefox enhance tracking protection. To do this, in Firefox, navigate to **Options** in the Firefox browser ➤ **Privacy & Security** ➤ **Enhanced Tracking Protection** ➤ select **Custom** ➤ uncheck
the box for Cookies.

• If you see a content security policy directive message in the iframe, check that your Engage allowlist includes the required URLs for embedding in CX Sales. Make sure to also confirm that the URL you are using is correct.

![embed-apps.p01.eloqua.com refused to connect.]

Adding an Engage link to Oracle CX Sales

There are two main steps that you must follow to add an Engage link to your Oracle CX Sales (formerly Oracle 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**:
  

  **Auto-login**:
  

  **SAML**:
  

- **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}`

Replace `{Login_Prefix}` with your four-character Eloqua login prefix code, such as ELQA. You can alternatively use `SiteId={site_ID}` with your Eloqua site ID, which is a numeric code. To find your login prefix or your site ID, navigate to Settings > Display Preferences > Company Defaults. 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.
Embedding Engage as a tab or button in Salesforce Classic

.installation

Note: If you are using Salesforce Lightning, see Embedding Engage as a tab or button in Salesforce Lightning.

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

There are two ways Engage can be deployed within Salesforce Classic:

- As a top navigational tab
- As a button on the Lead and Contact Page layouts

Embedding Engage as a tab in Salesforce Classic

Prerequisites:

- Build an allowlist of the domains that will be hosting embedded Engage pages. Learn more in the Configuring Engage topic.
- Determine the login method that users will use to access Oracle Eloqua. There are three methods: Auto-login, SAML, or direct. The method you use depends on the security model implemented at your organization. Auto-login and SAML are options that support Single Sign-On (SSO). Salesforce IDP is an option for Salesforce SSO logins. Direct login is for
logging in directly through Eloqua. When embedding pages in your CRM, be sure to use the Eloqua login URL determined by the login method.

• If you are using an SSO login method, ensure that SSO is setup in Oracle Eloqua. In most cases, you will then use the SAML login URL for embedding Eloqua Sales Tools. The Salesforce IDP login method is only supported if your organization continues to use the Salesforce native integration and have not migrated to the Salesforce Integration app. Learn more about SSO configuration.

To embed Engage tab as a tab in Salesforce Classic:

1. Log in to Salesforce.

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

3. Under the Web Tabs section for your Salesforce, click New.

4. Click Next through the default tab settings.

☞ Note: Engage is responsive and can work within any layout. Additionally, you may want to set the height of your tab to more than 800px to better accommodate the reporting available to users in Engage.

5. Once you are at Step 3: Enter the URL Details, in the Button or Link URL section input one of the following URLs based on your preferred configuration:
   • Direct: https://login.eloqua.com/apps/embed/salesTools/engage
   • Auto-login: https://login.eloqua.com/autoLogin?LoginPrefix={prefix}&Url=/apps/embed/salesTools/engage
• **Salesforce IDP**: https://{podURL}/sso/sfdc/v1/svp.aspx?LP=
  {prefix}&RU=/apps/embed/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-character company name. You can obtain your company’s login prefix in Eloqua by navigating to Settings > Display Preferences > 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.

6. 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.

**Prerequisites:**

- Build an allowlist of the domains that will be hosting embedded Engage pages. Learn more in the Configuring Engage topic.

- Determine the login method that users will use to access Oracle Eloqua. There are three methods: Auto-login, SAML, or direct. The method you use depends on the security model implemented at your organization. Auto-login and SAML are options that support Single Sign-On (SSO). Salesforce IDP is an option for Salesforce SSO logins. Direct login is for logging in directly through Eloqua. When embedding pages in your CRM, be sure to use the Eloqua login URL determined by the login method.

- If you are using an SSO login method, ensure that SSO is setup in Oracle Eloqua. In most cases, you will then use the SAML login URL for embedding Eloqua Sales Tools. The Salesforce IDP login method is only supported if your organization continues to use the Salesforce native integration and have not migrated to the Salesforce Integration app. Learn more about SSO configuration.

**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. Set up your 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.

**Note:** If you are using the older version of the Engage URL, then selecting to launch Engage in an existing window with sidebar or without sidebar will not work. See the following step for the appropriate URLs.

d. In the main box, enter one of the following URLs, depending on your login method:
   - **Direct:** https://login.eloqua.com/apps/embed/salesTools/engageZZZZ
   - **Auto-login:** https://login.eloqua.com/autoLogin?LoginPrefix={prefix}&Url=/apps/embed/salesTools/engageZZZZ
   - **SAML:** https://login.eloqua.com/auth/saml2/autologin?CheckFrame=false&LoginPrefix={prefix}&ReturnUrl=/apps/embed/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-character company name. You can obtain your company's login prefix in Eloqua by navigating to Settings > Display Preferences > 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.

- Replace **ZZZZ** with the action you want to assign to each button:

**Important:** You must replace `{emailaddress}`:
For lead objects, replace `{emailaddress}` with `{!lead.email}`.
For contact object, replace `{emailaddress}` with `{!contact.email}`.

- 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](https://login.eloqua.com/apps/embed/salesTools/engage)). 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:

• 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 &.

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

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**.

Embedding Engage as a tab or button in Salesforce Lightning

**Note:** If you are using Salesforce Classic, see Embedding Engage as a tab or button in Salesforce Classic.

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

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 Lightning

Prerequisites:

- Build an allowlist of the domains that will be hosting embedded Engage pages. Learn more in the Configuring Engage topic.

- Determine the login method that users will use to access Oracle Eloqua. There are three methods: Auto-login, SAML, or direct. The method you use depends on the security model implemented at your organization. Auto-login and SAML are options that support Single Sign-On (SSO). Salesforce IDP is an option for Salesforce SSO logins. Direct login is for logging in directly through Eloqua. When embedding pages in your CRM, be sure to use the Eloqua login URL determined by the login method.

- If you are using an SSO login method, ensure that SSO is setup in Oracle Eloqua. In most cases, you will then use the SAML login URL for embedding Eloqua Sales Tools. The Salesforce IDP login method is only supported if your organization continues to use the Salesforce native integration and have not migrated to the Salesforce Integration app. Learn more about SSO configuration.

To embed Engage as a tab in Salesforce Lightning:

1. Log in to Salesforce.
2. Navigate to Setup.
3. Locate the Quick Find search box, and search for Tabs
   Alternatively, you can click User Interface > Tabs.
4. Under the Web Tabs section for your Salesforce, click New.
5. Click **Next** through the default tab settings.

**Note:** Engage is responsive and can work within any layout. Additionally, you may want to set the height of your tab to more than 800px to better accommodate the reporting available to users in Engage.

6. Once you are at **Step 3: Enter the URL Details**, in the **Button or Link URL** section input one of the following URLs based on your preferred configuration:

7.  
   - **Direct**: https://login.eloqua.com/apps/embed/salesTools/engage
   
   - **Auto-login**: https://login.eloqua.com/autoLogin?LoginPrefix={prefix}&Url=/apps/embed/salesTools/engage
   
   
   - **Salesforce IDP**: https://{podURL}/sso/sfvc/v1/svp.aspx?LP={prefix}&RU=/apps/embed/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-character company name. You can obtain your company's login prefix in Eloqua by navigating to Settings > Display Preferences > 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.

8. 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.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.

Prerequisites:

- Build an allowlist of the domains that will be hosting embedded Engage pages. Learn more in the Configuring Engage topic.

- Determine the login method that users will use to access Oracle Eloqua. There are three methods: Auto-login, SAML, or direct. The method you use depends on the security model implemented at your organization. Auto-login and SAML are options that support Single Sign-On (SSO). Salesforce IDP is an option for Salesforce SSO logins. Direct login is for
logging in directly through Eloqua. When embedding pages in your CRM, be sure to use the Eloqua login URL determined by the login method.

- If you are using an SSO login method, ensure that SSO is setup in Oracle Eloqua. In most cases, you will then use the SAML login URL for embedding Eloqua Sales Tools. The Salesforce IDP login method is only supported if your organization continues to use the Salesforce native integration and have not migrated to the Salesforce Integration app. Learn more about SSO configuration.

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

1. Log in to Salesforce.
2. Navigate to **Setup**.
3. Locate the *Quick Find* search box, and search for **Object Manager**.
   Alternatively, you can click **Objects and Fields > Object Manager**.
4. Click the object you want to edit (for example a Contact or Lead).
5. Click **Buttons, Links and Actions**.
6. Click **New Button or Link**.
7. Alternatively, you can 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. Set up your 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/embed/salesTools/engageZZZZ](https://login.eloqua.com/apps/embed/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-character company name. You can obtain your company's login prefix in Eloqua by navigating to Settings > Display Preferences > 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:
Important: You must replace {emailaddress}:
For lead objects, replace {emailaddress} with {!lead.email}.
For contact object, replace {emailaddress} with {!contact.email}.

- 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:](https://secure.p02.eloqua.com/Main.aspx#emails&id=581) 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:

- 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 &.
8. 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.

To add custom buttons on the Salesforce Lead and Contact Page layouts:

1. While still editing your object, click Page Layouts.

2. Choose the appropriate layout.

3. Click Mobile & Lightning Actions.

   \textbf{Note:} Use Mobile & Lightning Actions to locate your button. Do not use Buttons, which is intended for Salesforce Classic.

4. Drag your button into one of the sections, such as Salesforce Mobile and Lighting Experience Actions.
5. Reorder the location of your button based on your needs.

Your button should now display in the record you edited.

**Embedding Engage in Microsoft Dynamics 2013**

You can embed Engage in Microsoft Dynamics 2013.

**Prerequisites:**
• Build an allowlist of the domains that will be hosting embedded Engage pages. Learn more in the Configuring Engage topic.

**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, such as *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


   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. In the **Form Libraries** section, 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).

   - **Direct login**
     ```javascript
     Xrm.Page.ui.controls.get("IFRAME_Engage").setSrc(newUrl);
     ```

   - **Autologin**
     ```javascript
     Xrm.Page.ui.controls.get("IFRAME_Engage").setSrc(newUrl);
     ```

   - **SAML SSO**
     ```javascript
     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}
Replace \{Login\_Prefix\} with your four-character Eloqua login prefix code, such as ELQA. You can alternatively use SiteId=\{site\_ID\} with your Eloqua site ID, which is a numeric code. To find your login prefix or your site ID, navigate to Settings > Display Preferences > Company Defaults. 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**

18. Click **Publish**.

19. Repeat for the Leads entity, if desired.
Embedding Engage in Microsoft Dynamics 365

You can add Engage to your Microsoft Dynamics 365 instance.

Prerequisites

- An installed Engage instance, its associated credentials, including company name and its login prefix
- A Microsoft Dynamics 365 instance and the permissions needed to customize it
- Build an allowlist of the domains that will be hosting embedded Engage pages. Learn more in the Configuring Engage topic.

To install Engage in Microsoft Dynamics 365:

1. Log in to Microsoft Dynamics 365 and navigate to Settings.

2. In the Customization section, click Customizations.
3. On the *Customization* page, click **Customize the System**.

4. On the *PowerApps* page, under *Components*, select **Entities > Contact > Forms**.

5. Click **New**, then select the form you want to add Engage to, such as *Main Form*.

6. Click the **Insert** tab.
7. Add a One Column Tab select the new tab and click IFRAME to add an iframe to it.

The Add an IFRAME window is displayed.
8. Enter the following iframe values.

- **Name**: IFRAME_Engage
- **URL**: http://about:blank
c. **Label**: Eloqua Engage

d. In the **Security** section, clear the **Restrict cross-frame scripting** option.

9. *(Recommended)* In the **Row Layout** section of the **Formatting** tab, increase the height by setting the number of rows to 20 so that Engage will have enough room to display its information.

10. On the **Dependencies** tab, add email as a dependent field.

11. Click **OK** to close the **Add an IFRAME** window.

12. On the **Home** tab, click **Form Properties**.

   ![Image of Form Properties window]

   The **Events** tab of the **Form Properties** window is displayed.

13. In the **Form Libraries** section, click **Add**. The **Lookup Record** window is displayed.

14. Select **new_EPPOnLoad** and click **Add**.
15. In the Event Handlers section of the Form Properties window, click Add.

The Handler Properties window is displayed.
16. From the **Library** list, select **new_EPPOnLoad**.

17. In the **Function** box, enter `loadEngage`, click **OK**, and then click **OK** to close the **Form Properties** window.

18. Double-click your new iframe. The **IFRAME Properties** window is displayed.

19. Click the **Events** tab, expand **Form Libraries**, and double-click **new_EPPOnLoad**. The **Edit Content** window is displayed.

20. Depending on your login type, copy and paste one of the following code snippets into the code editor:

   21. • Direct login

   ```javascript
   function loadEngage() {
   Xrm.Page.ui.controls.get("IFRAME_Engage").setSrc(newUrl);
   }
   ```
• Autologin

```javascript
function loadEngage() {
  Xrm.Page.ui.controls.get("IFRAME_Engage").setSrc(newUrl);
}
```

• SAML SSO

```javascript
function loadEngage() {
  Xrm.Page.ui.controls.get("IFRAME_Engage").setSrc(newUrl);
}
```

**Direct login example:**

Replace `{Login_Prefix}` with your four-character Eloqua login prefix code, such as ELQA. You can alternatively use `SiteId={site_ID}` with your Eloqua site ID, which is a numeric code. To
find your login prefix or your site ID, navigate to **Settings > Display Preferences > Company Defaults.** You can also choose to ignore this parameter and it will attempt to log you in using the first Eloqua saved credential it finds.

YYYY is optional.

To launch Engage with the template picker open, replace YYYYY with: emailChooser=true
To launch Engage with a specific template, replace YYYYY with: emailId={templateId}
To launch Engage with the contact's email address, replace YYYYY with: emailAddress="+
document.getElementById("{emailaddress1\}".title; and replace {emailaddress1} with the value in your Microsoft Dynamics 365 instance. For example, it can be emailAddress1, emailAddress1_d, or emailAddress1_i. To determine what is used in your Microsoft Dynamics 365 data, inspect an existing contact's email address with your browser's developer tools. For example, to find your value using Google Chrome:

a. Go to **Sales > Contacts** and click an existing contact.

b. Pressing Ctrl+Shift+I to open developer tools.


d. The value associated with the contact's email address field that is followed by `title="` {emailAddress}" indicates the value you need to include. In the following example, the needed
value is `emailaddress1_d`.

**Example:** If you chose autologin, your `{LoginPrefix}` is ELQA, and your `{emailaddress1}` value is `emailaddress1_d`, your code should look something like this:

```javascript
function loadEngage()
{
document.getElementById("emailaddress1_d").title;
Xrm.Page.ui.controls.get("IFRAME_Engage").setSrc(newUrl);
}
```

22. Click **OK** and then click **OK** to close the *IFRAME Properties* window.
23. On the Home tab, click **Save**, click **Publish**, and then close the PowerApps window.

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

Prerequisites:

- Build an allowlist of the domains that will be hosting embedded Engage pages. Learn more in the Configuring Engage topic.

To create a web applet:

1. Login to CRM onDemand with your Administrator credentials.

2. Navigate to User > Configure > Admin.

3. Click Application Customization.

4. Under Record Type Setup, click Contact.

5. Under Pay Layout Management, click Contact Web Applet, then enter the information below:
   - **Name**: Enter a name. (Example: Contact Engage)
   - **Location**: Select Detail Page
Type: Select URL

URL: Enter one of the following URLs

- Direct: https://login.eloqua.com/apps/embed/salesTools/engage?emailAddress=%%Email_Address%%

- Auto-login: https://login.eloqua.com/autoLogin?LoginPrefix={prefix}&Url=/apps/embed/salesTools/engage?emailAddress=%%Email_Address%%

- SAML: https://login.eloqua.com/auth/saml2/autologin?CheckFrame=false&LoginPrefix={prefix}&ReturnUrl=/apps/embed/salesTools/engage?emailAddress=%%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

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**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:


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

   **Note:** To find your IDP unique ID in Eloqua, navigate back to the Identity Management Provider interface. Right-click on the name of the Identity Provider...
you set up for OKTA and click **Open Link in New Tab**.

On the new browser tab, look at the URL and copy the ID that appears after "....Display/".

Once you have this properly formatted URL, as long as a user has an OKTA session active in their browser, the URL can be accessed from any location on the internet and it will allow seamless access to Engage.
Step 2: Accessing Engage as an OKTA app

To allow users direct access to Engage from apps in OKTA:

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