Oracle Eloqua Engage

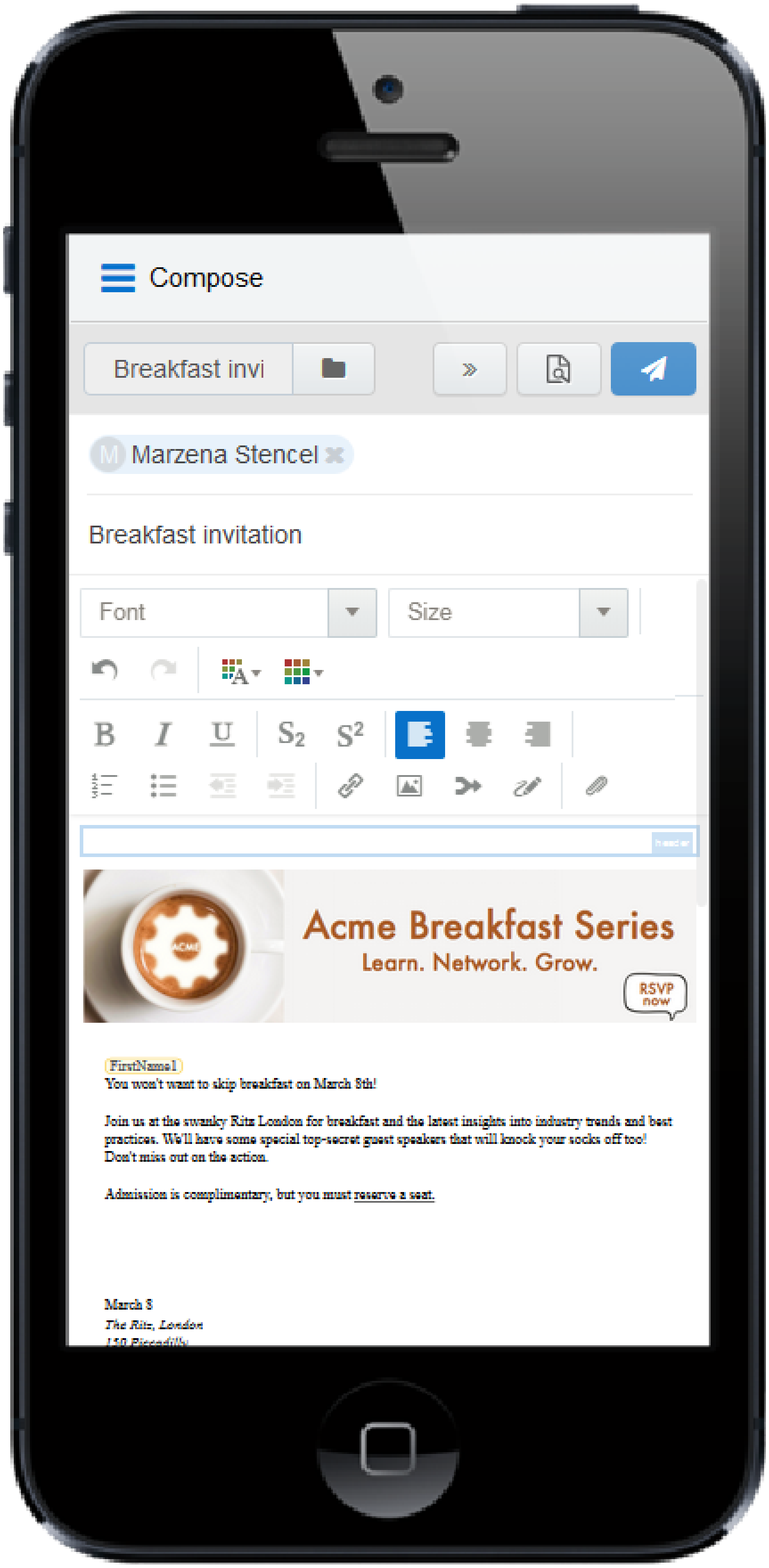
User Guide

01-Aug-2025

Contents

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 Stencel
Breakfast invitation
Font
Size
Acme Breakfast Series
Learn. Network. Grow.
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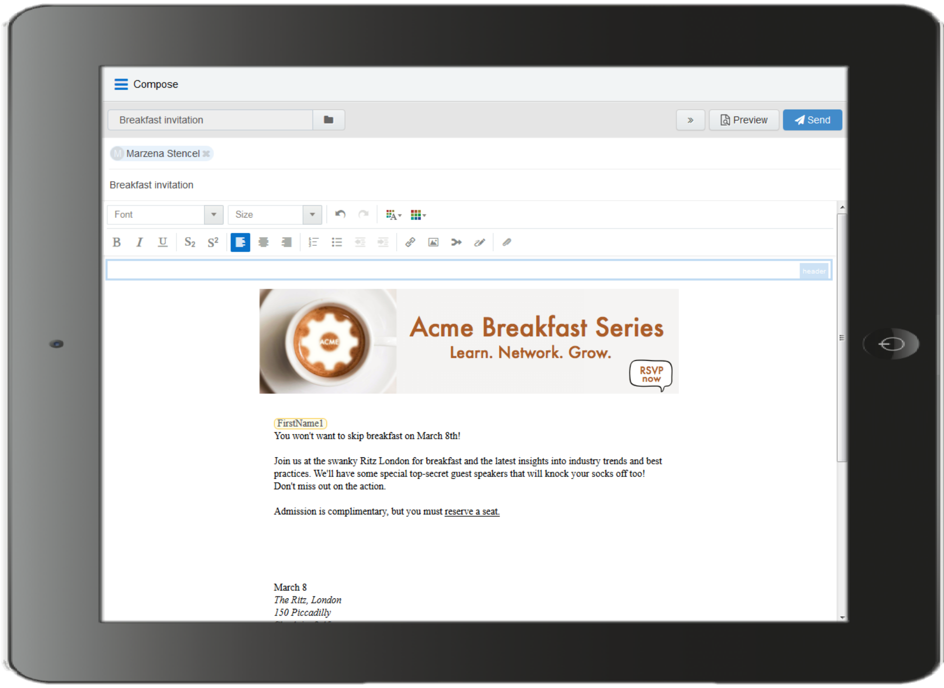
FirstName1
You won't want to skip breakfast on March 8th!
Join us at the swanky Ritz London for breakfast and the latest insights into industry trends and best practices. We'll have some special top-secret guest speakers that will knock your socks off too! Don't miss out on the action.
Admission is complimentary, but you must reserve a seat.
March 8
The Ritz, London



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.

Step	Description
Installing Engage	Install the Engage app in your instance. A customer administrator should perform the install. See Installing Engage.
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. Additionally, if users will be using the Oracle Eloqua Sales Tools for Microsoft Outlook, users must have the Eloqua Sales Tools for Microsoft Outlook license. To use an email template, Engage users must have view access to view all assets associated with the template: • Email template, template headers and footers

Step	Description
	• Any landing page or associated form referenced by an email template • Cascading asset permissions from there may also be required - for example, assets referenced by form processing rules We recommend assigning Engage users to the following security groups: • Engage Users • Active Users Sales These groups grant the appropriate licenses and ensure that View permissions are granted to appropriate assets. If you customize security groups or default asset permissions, consider the impact to your Engage users. Learn more about security groups. Engage users can be • 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. • Set up manually. See Creating individual users or Uploading multiple user accounts.
Allowing Engage users to create contacts	By default, Engage users cannot create new Eloqua contacts. If you want to allow users to create contacts, grant users the Manage Contacts action permission. See action permissions.

Step	Description
	You should then also ensure the Engage users have access to the appropriate contact views. See Configuring Eloqua contact views in Sales Tools.
Setting up email group access	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. 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. See Making a template available in Engage and Email groups.
Creating Engage templates	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.) See Making a template available in Engage.
Creating signature layouts	If you want Engage emails to use a standard signature, 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. If you allow Engage users to send personal emails (blank

Step	Description
	emails), they can also set up their own signature using the Engage app. See Creating an email signature.
Testing Engage templates	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. Learn more about accessing Engage. If your users will be using the Oracle Eloqua Sales Tools for Microsoft Outlook add-in, be sure to test your templates in Microsoft Outlook as well. Learn more about the Microsoft Outlook add-in.
Accessing Engage	Work with your sales organization to determine the best method for accessing Engage. • Integrate Engage with your CRM 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. • Use the Oracle Eloqua Sales Tools for Microsoft Outlook add-in 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. • Direct link This is a customizable link you can use to launch Engage directly.

Step	Description
	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.
Onboard Engage users	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. See Using Engage for tasks related to using Engage.
Report and monitor	After sales reps start using Engage, you can use Insight reports to monitor template performance and overall usage. Start with these reports available from the Insight catalog: • Sales Email Overview report • Sales Email Template Usage report • Sales Email Opens and Website Visits report Sales reps can also review the performance for their sent messages. Refer to the following topics for more information: • Engage reports • Viewing email performance using Microsoft Outlook

Making a template available in Engage

Engage integration

Installing Engage

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

Important: Because deleting or deactivating the installer user account will impact installed apps, we recommend installing apps using a user account that is not tied to a specific person. The user account must have customer administrator rights. 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*. Learn more.
5. Click **Save**.
6. Click **Accept** or switch users.

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

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.

Settings

Recipients

- **Restrict the maximum number of recipients to**: Specify the maximum number of recipients a single email can be sent to. The highest number you can enter for this field is 2,000.
- **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.
- **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 send a non-templated blank email. When disabled, Engage users can only use Engage templates created for them. This option is enabled by default. Review the considerations when enabling this feature.
- **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:

- **Salesforce**: *.force.com, *.salesforce.com, *.my.salesforce.com, *.lightning.force.com, and *.visualforce.com
- **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.

Considerations when allowing blank emails

You can enable your sales reps to create blank emails. Blank emails are non-templated emails. Here are some considerations to take into account about allowing blank emails:

- Blank emails are not associated to an email group. So recipients cannot unsubscribe from these types of emails sent by your sales users.
- Blank emails will not contain any headers or footers. So this means that unsubscribe links are not included in these emails.
- In terms of reporting on blank emails in Insight, the emails appear in reports as Tracked Emails. You cannot report on the subject line of a blank email.

> **Tip**: If you disable this feature, you can create a blank email template for sales which would give them control over their email but allows you to ensure headers, footers, and unsubscribe links are included.

Accessing Engage

Overview

Work with your sales organization to determine the best method for accessing Oracle Engage. You can use any of the following methods:

- Integrate Engage with your CRM
  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. Learn more.
- Direct link
  This is a customizable link you can use to launch Engage directly.
- Use the Oracle Eloqua Sales Tools for Microsoft Outlook add-in
  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.
- Oracle Eloqua Sales Tools for Google Chrome
  The Google Chrome extension allows sales representatives to access Profiler from their Google Chrome browser. For example, while browsing prospect websites, the sales rep can open the extension to review Eloqua contacts at that company. Resp can also access Engage directly from the extension. Learn more.

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

Engage URLs

To access Engage , you can use one of the following types of URLs:

- A simplified login URL that will handle all login flows based on the user logging in and your Oracle Eloqua configuration. Using this URL, if you have SSO configured for the instance and user, then the user will be redirected to your default identity provider login screens. If you don't have SSO, the user will be prompted for their username and password. Learn more.
- A legacy login URL that is specific to the desired login flow and security model at your organization. There is a separate login URL for auto-login, SAML login, or CVP login. 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. Learn more.

Simplified login URL

To access the Engage email composer using the simplified login URL:

```
https://login.eloqua.com/siteLogin?SiteName=
{CompanyName}&ReturnUrl=/apps/salesTools/engage/compose
```

If you are embedding Engage pages into an iframe, use the following URL. Learn more.

```
https://login.eloqua.com/siteLogin?SiteName=
{CompanyName}&ReturnUrl=/apps/embed/salesTools/engage/compose
```

The following table describes the supported URL parameters you can use to further customize the login experience. In addition, you can also add Engage URL parameters to customize the compose experience. Learn more about Engage URL parameters.

Parameter	Description
SiteName={companyName}	Optional Your instance company name. When provided, users are not prompted to provide a company name. If the user has an existing session, they will then be logged in automatically. Example: `https://login.eloqua.com/siteLogin?SiteName=ExampleSiteName`
ReturnUrl={Url}	Optional The Oracle Eloqua URL to redirect to after logging in. You must provide the `SiteName` parameter if you want to use this parameter. Example: Redirect to the Engage email compose page: `https://login.eloqua.com/siteLogin?SiteName=ExampleSiteName&ReturnUrl=/apps/salesTools/engage/compose`
Checkframe={true or false}	Optional Checks if the login page is being accessed from within an iframe and create a popup window if it is. • `true` checks for the frame. • `false` does not check for the frame. If the result is a displayable page that cannot be viewed in an iframe, then the user will get a block from their browser. Use only if it can be guaranteed the current user is already authenticated with the default

Parameter	Description
	SSO used by Oracle Eloqua to skip the popup. Example: Checkframe while logging into Engage: `https://login.eloqua.com/siteLogin?SiteName=ExampleSiteName&CheckFrame=true&ReturnUrl=/apps/salesTools/engage/compose`
UseDefaultSSO={true or false}	Optional Specifies whether or not to use the default identity provider configured for your instance. Use this parameter if you have multiple identity providers and want to ensure the default identity provider is used. • `true` to use the default SSO • `false` to prompt the user to choose the identity provider Example: Checkframe while logging into Engage: `https://login.eloqua.com/siteLogin?UseDefaultSSO=true`
Idp={IdentityProviderId}	Optional The ID for the identity provider you want to use. Use this parameter if you have multiple identity providers configured for your Oracle Eloqua instance and you want to use a non-default identity provider. You can retrieve the identity provider ID from the SSO identity provider screens.

Parameter	Description
	You must provide the `SiteName` parameter if you want to use this parameter. Example: `https://login.eloqua.com/siteLogin?SiteName=ExampleSiteName&Idp=69627DAC73E04DE79CDFC90D132B65EA`
Username={username}&Password={encryptedPassword}	The user name and encrypted password. The password parameter is encrypted. To retrieve the encrypted version of the user password, you must open a Service Request with Oracle Support. You must provide the `SiteName` parameter if you want to use the user name and password parameters.

Legacy login URLs

The following lists the legacy login URLs to access to the Engage compose page based on the desired login methods. These URLs continue to be supported. The URL 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.

- **Direct**: https://login.eloqua.com/apps/salesTools/engage/compose
- **Auto-login**: 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 unique four-character code for your Eloqua instance. 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, use the SAML or Salesforce IDP login URL. The SAML URL should be used if SSO with Salesforce is setup using Eloqua's SAML capability. The Salesforce IDP login method is only supported if your organization continues to use the Salesforce native integration and has not migrated to the Salesforce Integration app. Learn more about SSO configuration.

You can also add additional Engage URL parameters to customize the Engage experience. Learn more about Engage URL parameters.

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.

To embed Engage into an iframe:

1. Update the Engage app with an allowlist of domains that will host Engage pages. Learn more.
2. Adjust the URLs listed above to include `/embed/` in the URL: `/apps/embed/salesTools/engage/compose`.

Learn more about Engage integration.

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.

Engage URL parameters

You can add parameters to the Engage compose URL (`apps/salesTools/engage/compose` or `apps/embed/salesTools/engage/compose`) to pass in recipients, a specific template, or open a blank email.

The table below describes the parameters you can use. Parameters can be combined.

Query parameter	Description
emailAddress={emailAddr	Compose a message for a specific recipient. For multiple recipients, use commas or semicolons to separate them. **Examples**

Query parameter	Description
ess}	• Compose a new message to person@example.com: `{URL}/compose?emailAddress=person@example.com` • Compose a new message to multiple recipients: `{URL}/compose?emailAddress=person@example.com;person2@example.com;person3@example.com` Tip: If you are embedding in CRM, you can pass the email address using the appropriate lead or contact parameter from your CRM. Learn more about integration.
blank=true	Open a blank email. This option opens a blank email if the Engage administrator has allowed for blank emails. If the creation of blank emails is not allowed, the Engage template chooser opens. Learn more about configuring Engage. **Examples** • Compose a new blank email: `{URL}/compose?blank=true` • Compose a new blank email to person@example.com: `{URL}/compose?blank=true&emailAddress=person@example.com`
emailId={id}	Compose a message using a specific template. To determine the *templateID*, open the email in Eloqua and refer to the URL. The ID is the last portion of the URL. **Examples** • Compose a new message using template ID 581: `{URL}/compose?emailId=581` •

Query parameter	Description
	Compose a new message to person@example.com using template ID 581: `{URL}/compose?emailId=581&emailAddress=person@example.com`

Configuring Engage

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

Before you begin:

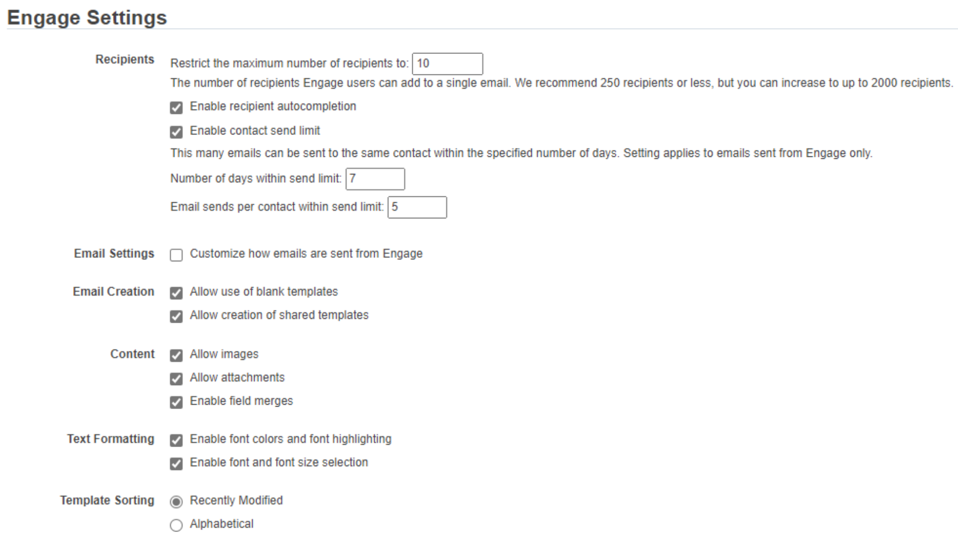
- You must be a customer administrator to configuration the Engage app.
- Some Engage settings do not apply to Sales Tools for Microsoft Outlook sends. See Frequently asked questions for Sales Tools for Microsoft Outlook.

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. Learn more.



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

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

Settings

Recipients

- **Restrict the maximum number of recipients to**: Specify the maximum number of recipients a single email can be sent to. The highest number you can enter for this field is 2,000.
- **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.
- **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

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

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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.

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    - **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 send a non-templated blank email. When disabled, Engage users can only use Engage templates created for them. This option is enabled by default. Review the considerations when enabling this feature.
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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.
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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:

- **Salesforce**: *.force.com, *.salesforce.com, *.my.salesforce.com, *.lightning.force.com, and *.visualforce.com
- **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.

Considerations when allowing blank emails

You can enable your sales reps to create blank emails. Blank emails are non-templated emails. Here are some considerations to take into account about allowing blank emails:

- Blank emails are not associated to an email group. So recipients cannot unsubscribe from these types of emails sent by your sales users.
- Blank emails will not contain any headers or footers. So this means that unsubscribe links are not included in these emails.

- In terms of reporting on blank emails in Insight, the emails appear in reports as Tracked Emails. You cannot report on the subject line of a blank email.

Tip: If you disable this feature, you can create a blank email template for sales which would give them control over their email but allows you to ensure headers, footers, and unsubscribe links are included.

Using Engage

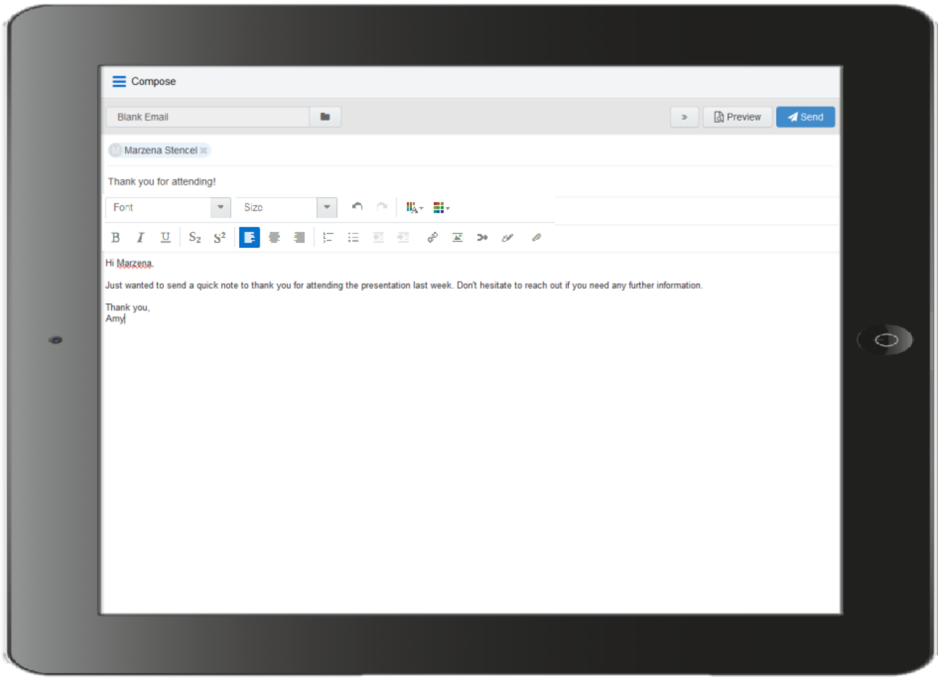
Use Engage to send personal email messages or email based on templates created in Oracle Eloqua. Customize your email by adding images, attachments, hyperlinks, and so on.

Sending personal email messages

You can compose an Engage email without a template. These are called blank emails and allow you to email Oracle Eloqua contacts in a highly personalized way, while maintaining Eloqua activity tracking.

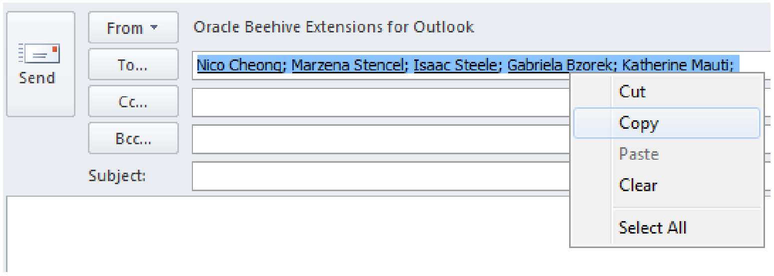
Before you begin

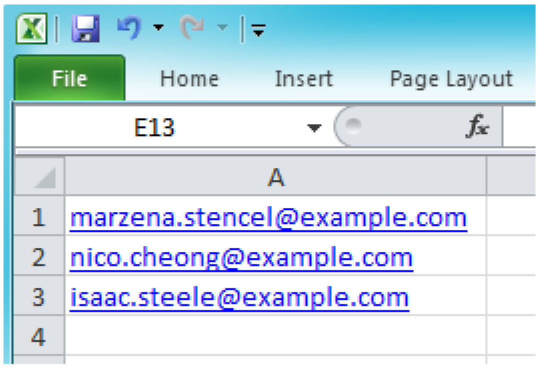
- You can only use blank emails if allowed by your administrator. Learn more about Engage app settings.
- Blank emails do not include Default headers and footers or an email group. If you want to ensure you include headers and footers, send email using a template created in Oracle Eloqua.
- Blank emails are sent using your default email signature. Learn more about setting up your signature.
- The steps below reflect accessing Engage directly. Your administrator determines how you access Engage which could be directly from your CRM. Learn more.



To send a personal email using Engage:

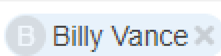
1. Open Engage.
2. Click **Compose**.
3. Select **Blank Email**, then click **Choose**. If you created a signature, it will automatically appear on the blank canvas.
4. Create your email. Use the rich text options (bold, italic, underline, numbering, bullets, indentation, as well as font style, size, 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.





Note: 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.

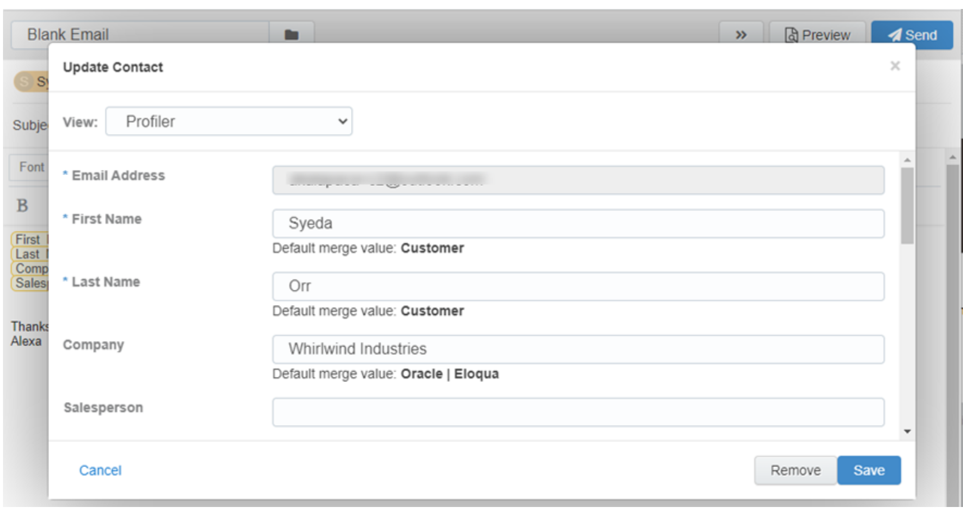
- As you enter an email recipient's name or email address, Engage tries to validate the address:

	A recipient highlighted in yellow indicates the contact doesn't exist in the Eloqua database or is missing field merge values. You will be prompted to create or update the contact when you send the message. Your administrator may not allow you to create or update contacts, and in this case, you must remove the recipient.
	A recipient highlighted in red indicates the contact is globally unsubscribed. You must remove the contact. Learn more.
	A recipient highlighted in blue indicates the contact can be sent the message. Further validations though will happen when you send the message.

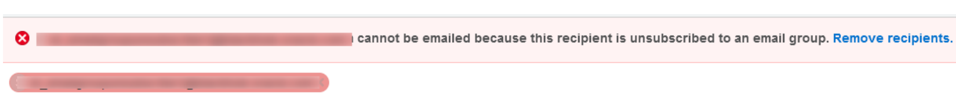
6. Enter the email subject.
7. Preview your email.
8. (Optional) Save your email.
9. When you're ready to send your email, click **Send** and resolve any issues.

   After clicking Send, Eloqua checks for new contacts, contacts with missing field merges, and whether the contact can be emailed based on the contact's group subscription status and the email frequency settings specified by your administrator.

   - Any contacts that don't exist in the Oracle Eloqua contact database appear yellow. When you send the message, the *Create Contact* popup appears. If you can create contacts, complete as much detail as you can about the new contact. Otherwise, you must remove the contact.
   - If your email contains field merges, and the contact is missing field values, the fields also appear on the *Create Contact* popup for you to complete for each contact. If your administrator allows you to update contacts, you can complete the field merges. Otherwise, the default or a blank value will be used if no default has been set.



   - You will be prompted to remove a contact if the contact is unsubscribed from the email group, is on the master exclude list, or has reached the email frequency setting specified by your administrator. These checks are not performed until you attempt to send the email. Learn more.

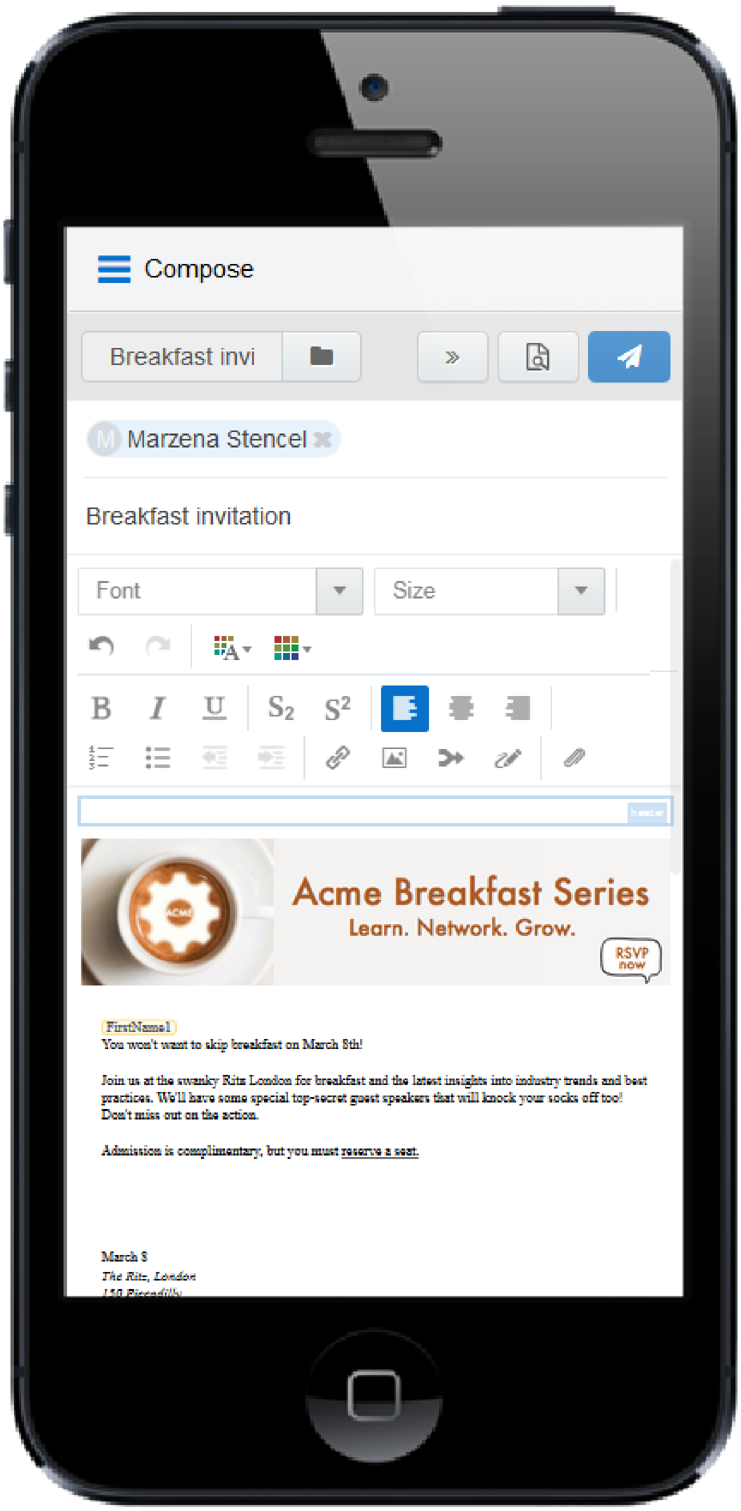


After you finish:

- Once the email is sent, Engage displays your *Recent Emails Sent* history and send status.
- If you have issues with sending your message, learn more about troubleshooting Engage issues.

Sending emails created in Oracle Eloqua

You can send emails from Engage by using a template created by your Oracle Eloqua administrator. Learn about making email templates available in Engage.

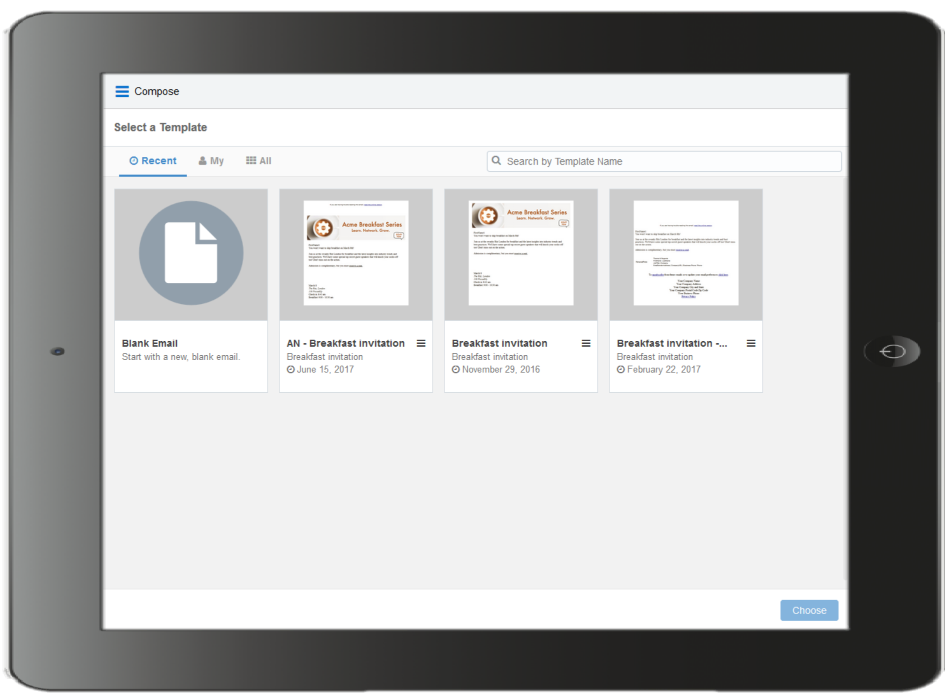


Before you begin:

- The steps below reflect accessing Engage directly. Your administrator determines how you access Engage which could be directly from your CRM. Learn more.
- Engage allows you to send emails to contacts in the Oracle Eloqua database. If permitted by your administrator, you can create new contacts while composing your message.
- You can email a list of recipients by copying and pasting the list into your message. However, each recipient will receive the message as if it was a personal message directly to them. They will not be able to see the other recipients in their message. Your administrator determines the maximum number of allowed recipients.
- You cannot schedule the sending of email from Engage.

To send an email created in Oracle Eloqua:

1. Open Engage.
2. Click **Compose**. The *Select a Template* page is displayed.
3. Select the template you want to use and click **Choose**.

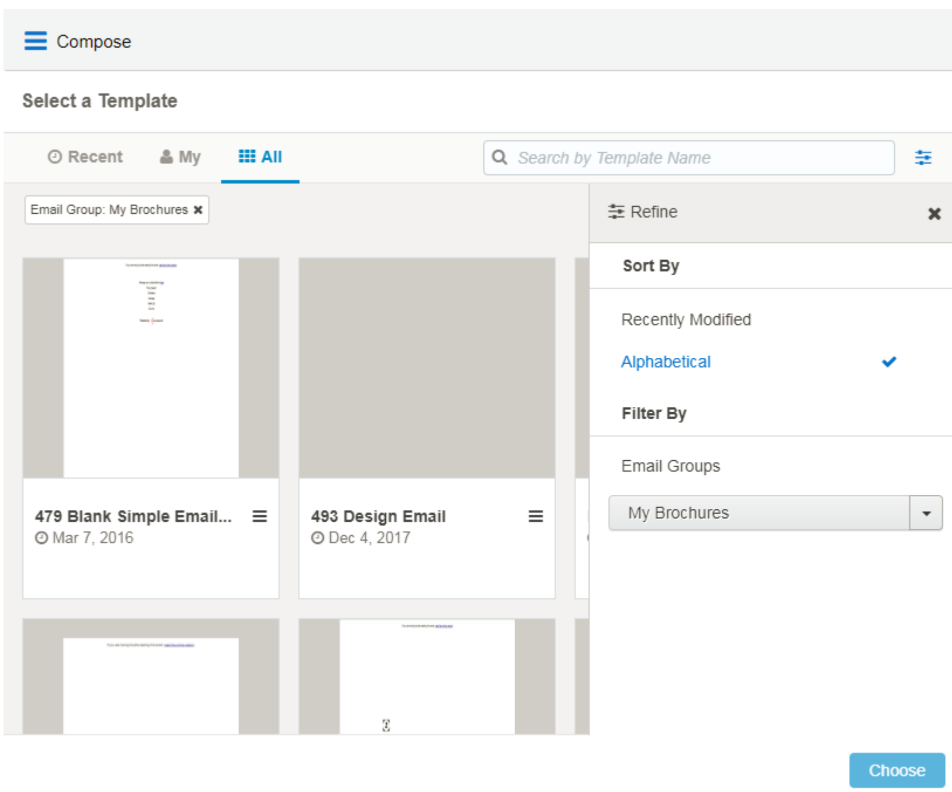


Tips for finding an email template

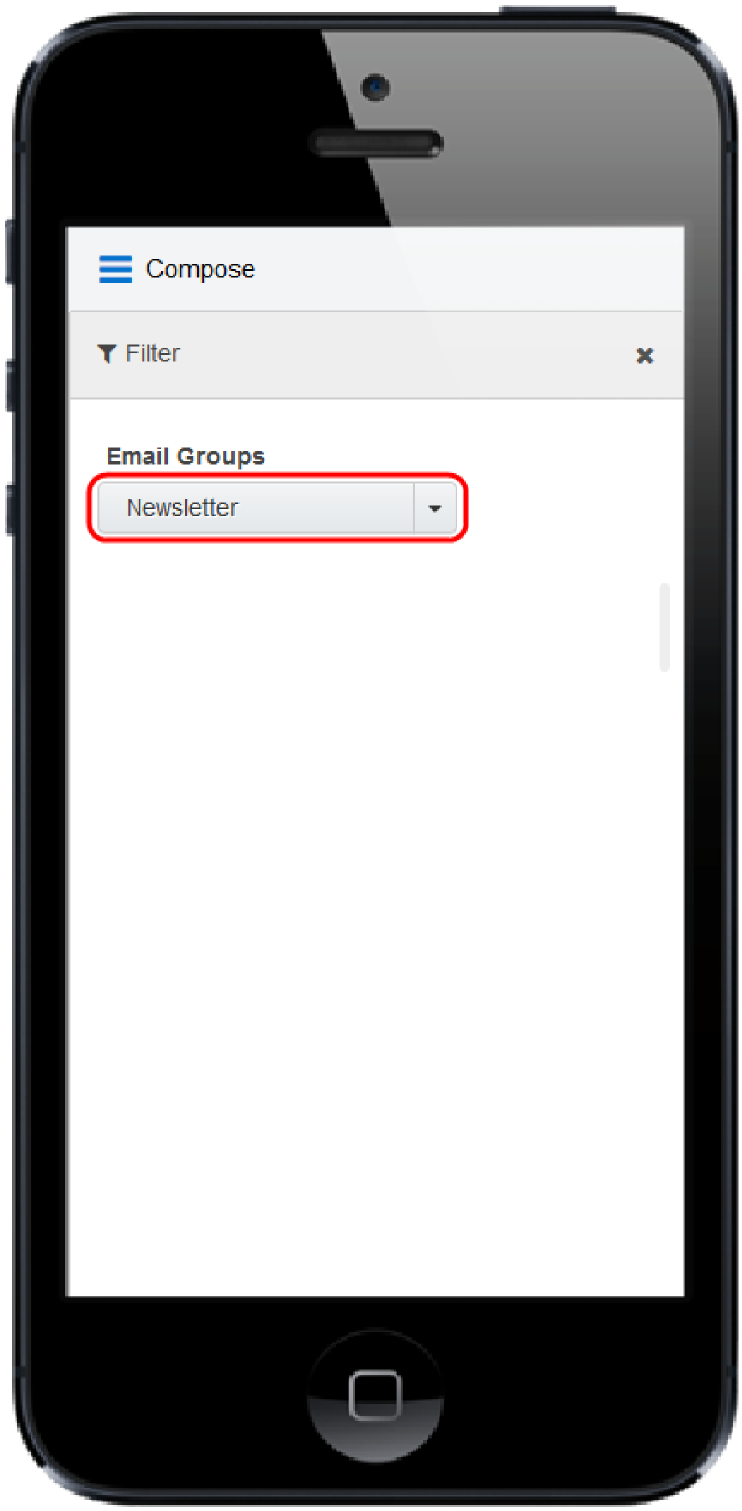
a. You can search for a template by name or subject line.

b. Use the tabs to help quickly find the template you are looking for:

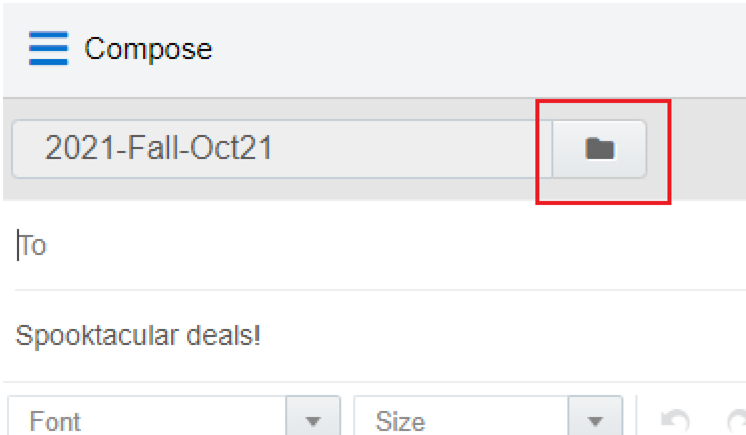
- *Recent*: Displays any templates you recently viewed. This is the default tab. The first template is *Blank Email*, if this permission has been enabled in Engage Global Settings. Select this to create your own personal email in Engage without using a template.
- *My*: Displays templates created by 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 templates. By default, the newest templates are listed first. Click the refine icon to sort alphabetically and to filter by an email group.



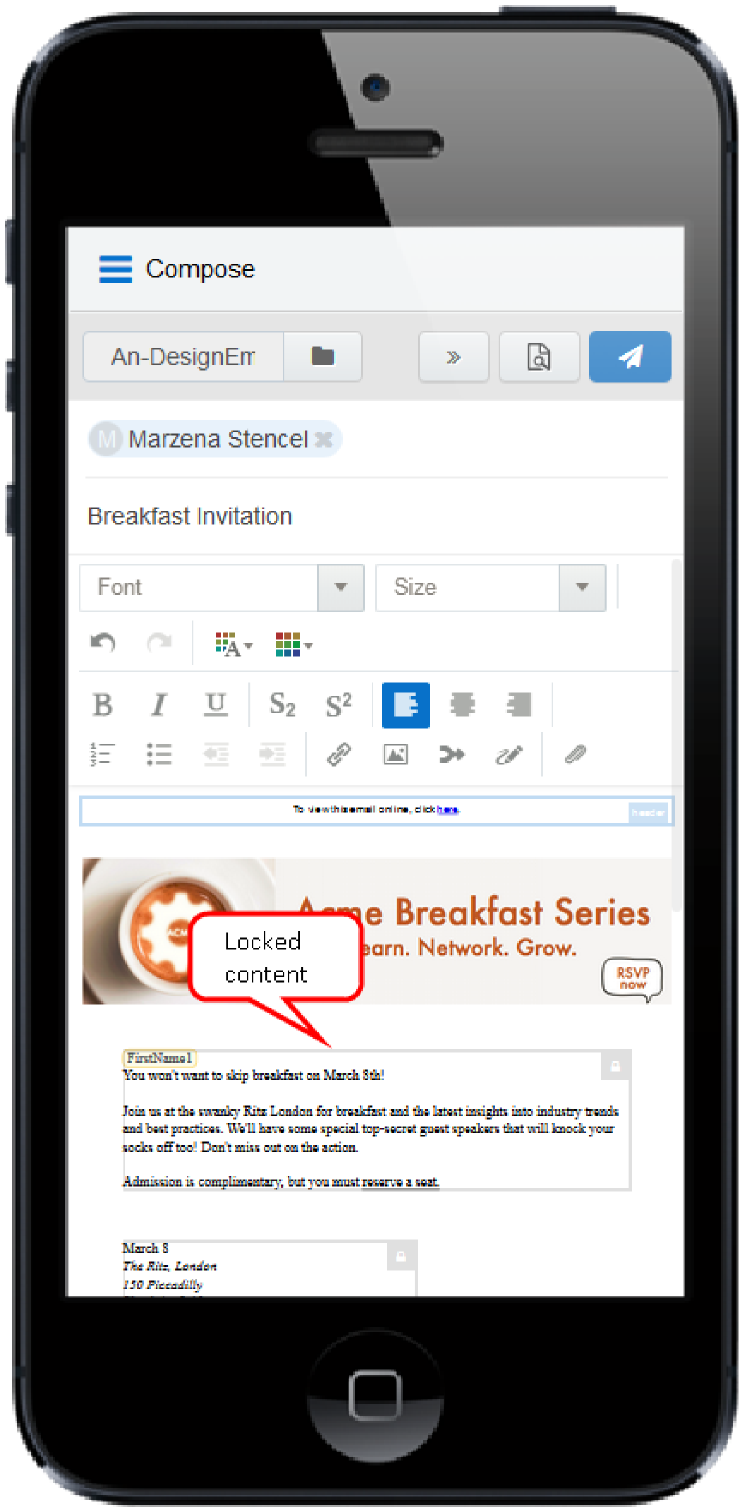
c. You can filter templates in *My* and *All* tabs based on an email group and sort them. Click the refine icon to select the desired email group or sort templates alphabetically or by most recent. You can combine the email group filter and search to narrow down your list of templates. To clear the filter, select **All** in the email group drop-down or remove the email group label.


Compose
Filter
Email Groups
Newsletter

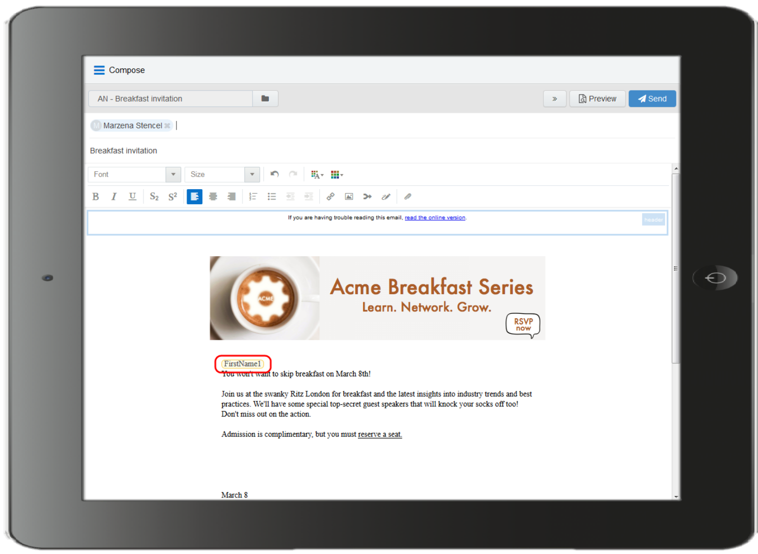
4. After choosing a template, you can go back and select a different template by clicking the folder icon again. Selecting a different email overrides any change you have made.



5. 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.
   - 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 the template.

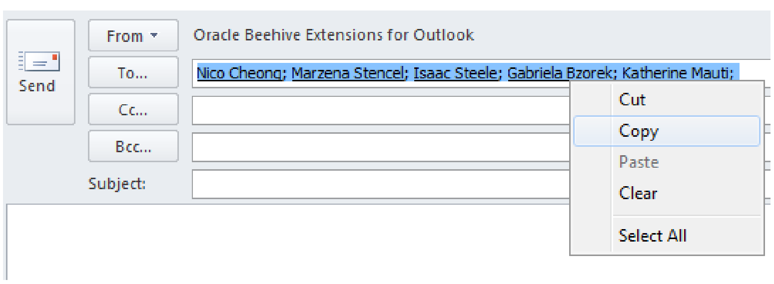


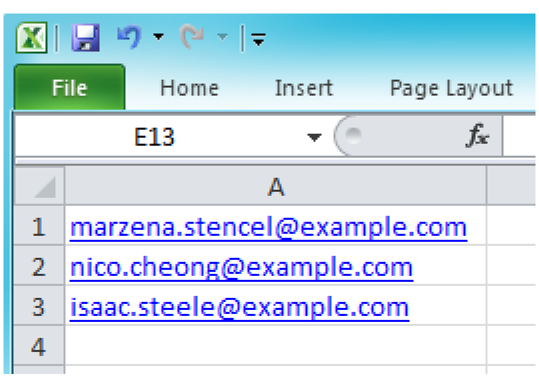
- Field merges can be easily identified. They are highlighted in yellow throughout your email, including the *Subject* line. If needed, you can delete merged fields from the *Subject* line. If field merges in the body of the email template are protected, you cannot edit them. The values of these fields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



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

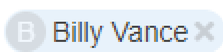
    - You can manually enter your recipients' email addresses or copy and paste contacts from Microsoft Outlook, as well as XLS and CSV files.





> **Note**: 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.

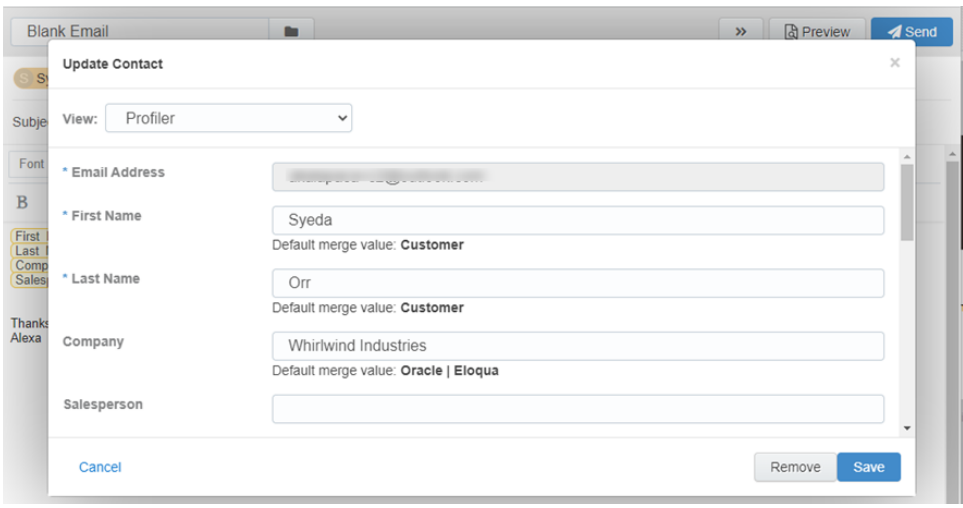
- As you enter an email recipient's name or email address, Engage tries to validate the address:

	A recipient highlighted in yellow indicates the contact doesn't exist in the Eloqua database or is missing field merge values. You will be prompted to create or update the contact when you send the message. Your administrator may not allow you to create or update contacts, and in this case, you must remove the recipient.
	A recipient highlighted in red indicates the contact is globally unsubscribed. You must remove the contact. Learn more.
	A recipient highlighted in blue indicates the contact can be sent the message. Further validations though will happen when you send the message.

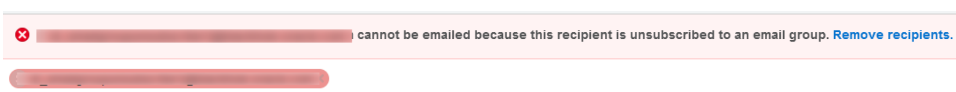
7. Modify the email subject.
   - The email Subject line is pre-populated based on the template you selected. It can be modified.
   - Merged fields or dynamic content pre-populated in the *Subject* line cannot be modified but can be deleted.
   - The email subject is replaced if you select a different template.
8. Preview your email. To return to the email, click **Edit**.
9. At this point, you can choose to save the message as a new template. Learn more.
10. When you're ready to send your email, click **Send** and resolve any issues.

    After clicking Send, Eloqua checks for new contacts, contacts with missing field merges, and whether the contact can be emailed based on the contact's group subscription status and the email frequency settings specified by your administrator.

- Any contacts that don't exist in the Oracle Eloqua contact database appear yellow. When you send the message, the *Create Contact* popup appears. If you can create contacts, complete as much detail as you can about the new contact. Otherwise, you must remove the contact.
- If your email contains field merges, and the contact is missing field values, the fields also appear on the *Create Contact* popup for you to complete for each contact. If your administrator allows you to update contacts, you can complete the field merges. Otherwise, the default or a blank value will be used if no default has been set.



- You will be prompted to remove a contact if the contact is unsubscribed from the email group, is on the master exclude list, or has reached the email frequency setting specified by your administrator. These checks are not performed until you attempt to send the email. Learn more.



After you finish:

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

  You must have appropriate asset permissions to delete email templates.

- Once the email is sent, Engage displays your *Recent Emails Sent* history and send status.
- From the template chooser, you can delete templates by clicking the ≡ icon and selecting **Delete**. You must have appropriate asset permissions to delete email templates.
- If you have issues with sending your message, learn more about troubleshooting Engage issues.

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:

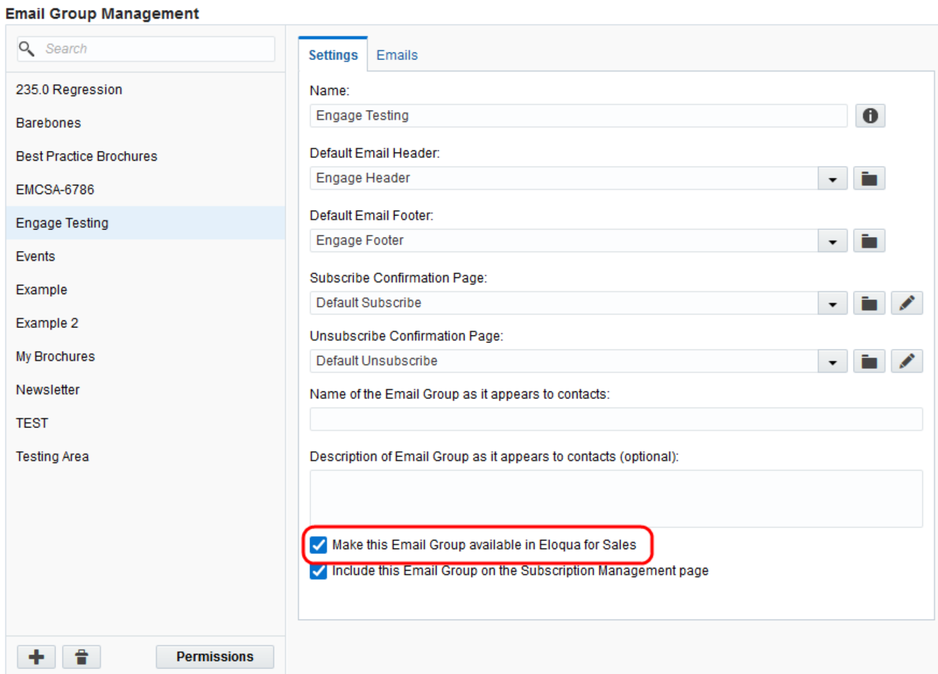
- Verify and adjust permissions. To use the template, Engage users must have access to the email group and View asset permissions. Engage also requires View permissions for any landing page, form, or assets used in form processing steps such as custom objects.
- Enable customized content. Administrators 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.
- Contacts can only be sent messages using the template if they have subscribed to the template's email group. This group subscription check happens after the Engage user clicks Send to send the message.
- Consider only using a field merge if there is a default value for it. If the Engage message recipient doesn't have a value for the field merge, the Engage user is always prompted to update the contact record with missing values. Only if your Eloqua administrator has allowed Engage users to update contact records, will they be able to add a value for the field. Engage users can still send the message with no value, but this may mean your message doesn't read as you want it to.

To make a template available in Engage:

1. Create and configure your email group and make it available to Engage.
    a. Navigate to **Assets** > **Email Setup** > **Email Groups**.
    b. Select an existing email group or create an new one.

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



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

e. Save your changes.

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

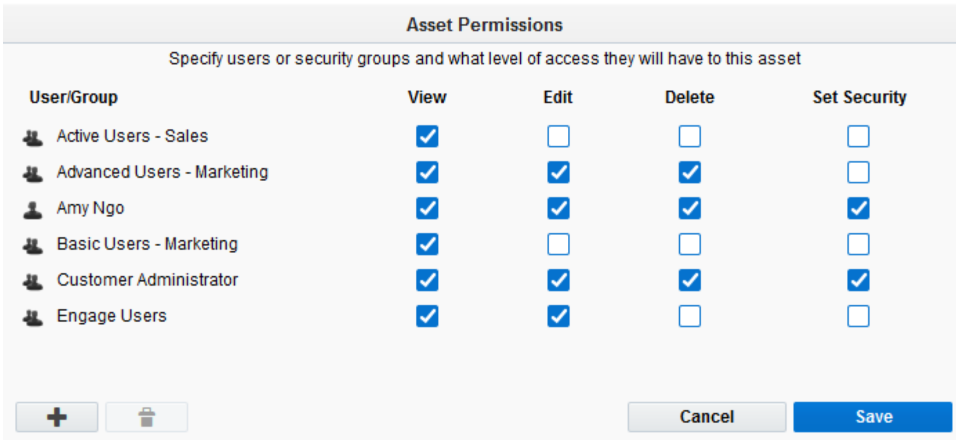
a. Navigate to **Assets** > **Emails**.

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

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

c. Ensure that you assign the email to the email group that you enabled for sales above. Contacts can only be sent messages using the template if they have subscribed to the template's email group. This group subscription check happens after the Engage user clicks Send to send the message.

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.

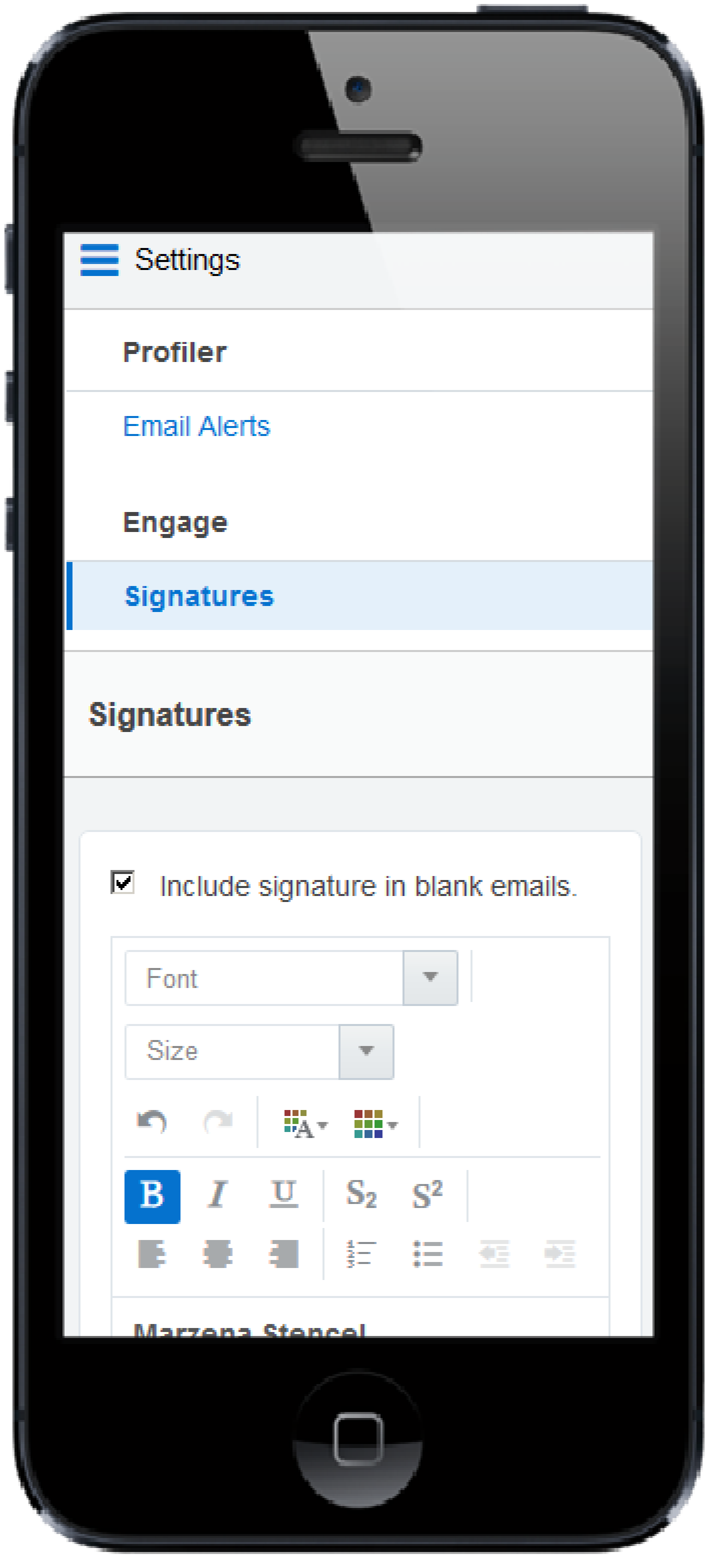


Creating an email signature

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 overwritten.

To create an email signature in Engage:

1. Click **Settings**  .
2. Select **Include signature in blank emails**.
3. Create your signature. Personalize it by using rich text options (bold, italic, underline, numbering, bullets, indentation, as well as font style, size, and color).



4. Click **Save Settings**.

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

Creating Engage templates

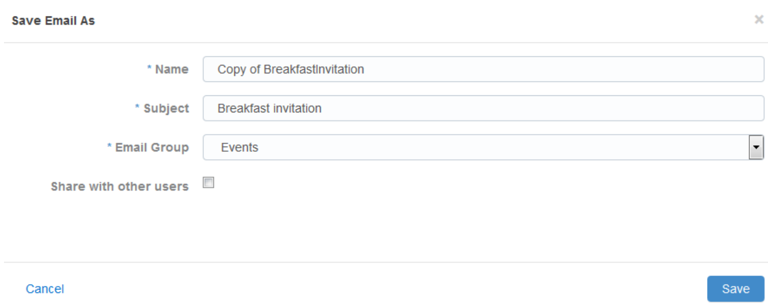
You can create a template in Engage so that you can reuse an email you've customized or share new templates with other Engage users.

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

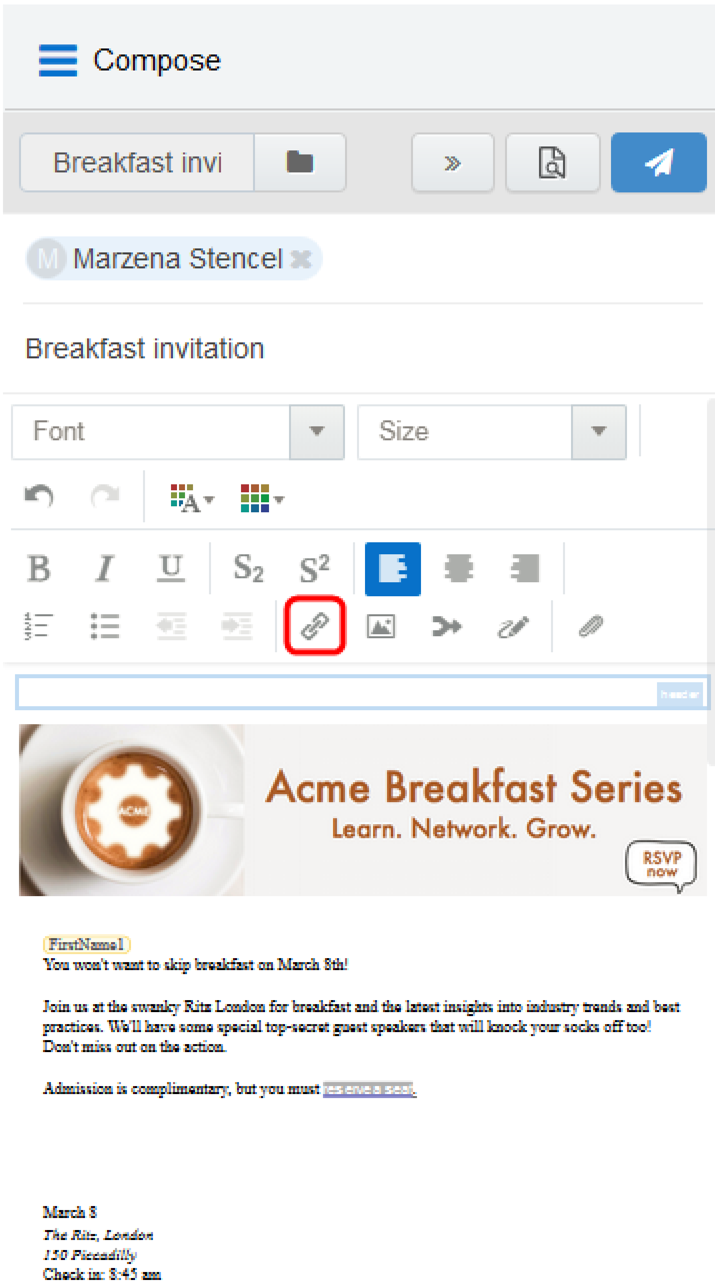
You can insert hyperlinks in your Engage emails. A hyperlink can route your clients to a landing page, a file, a web page, a system action, or a pre-addressed email that they can fill out and send. You can also modify existing hyperlinks in your emails, as long as the content is not locked.

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

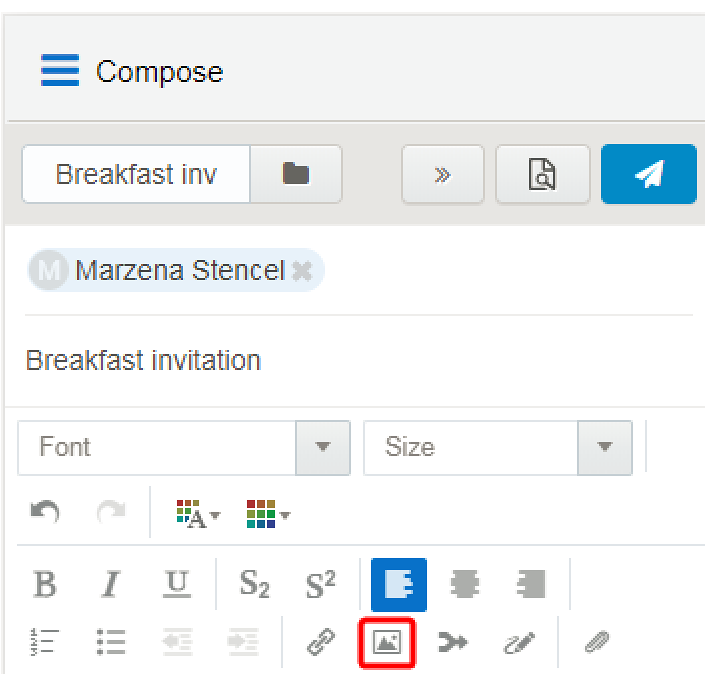
- Administrators must enable the insertion of images in Engage emails in *Engage Global Settings* (**Settings** > **Apps**, under the *Platform Extensions* section). Learn more about configuring Engage Global Settings.
- Images in Oracle Eloqua must have appropriate asset permissions in order to be available 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.

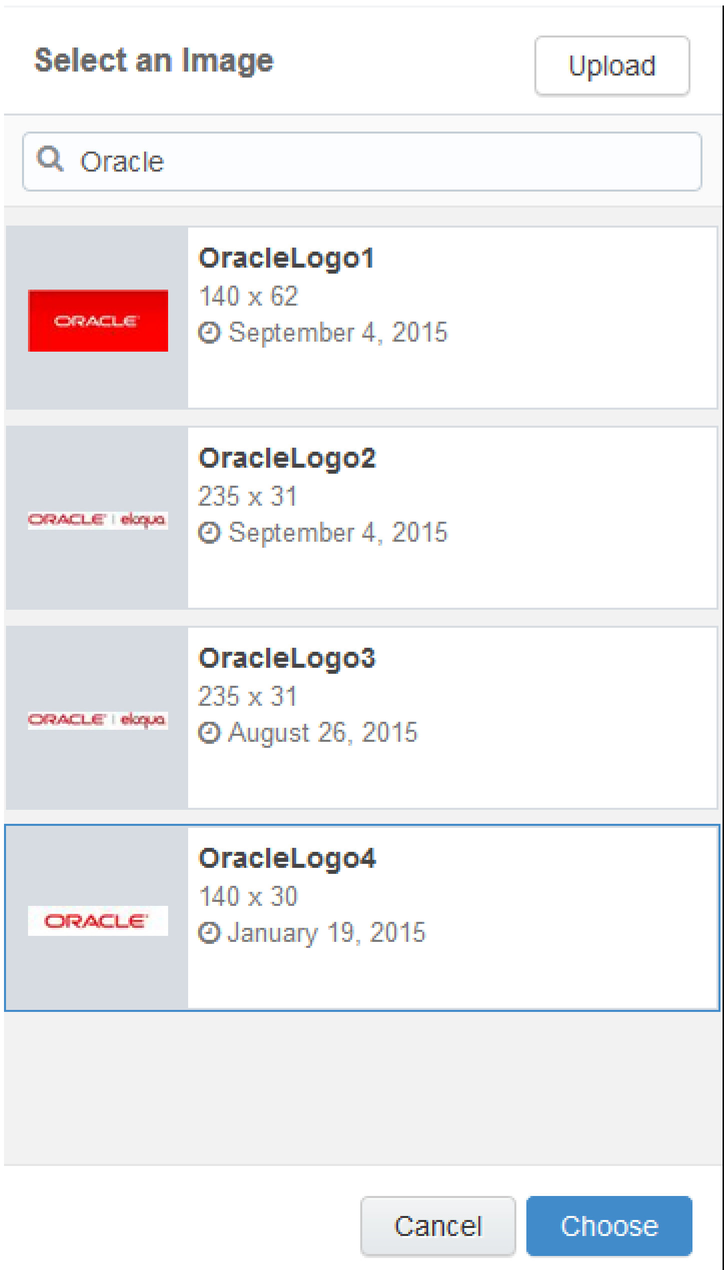
To add an image to an email:

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.



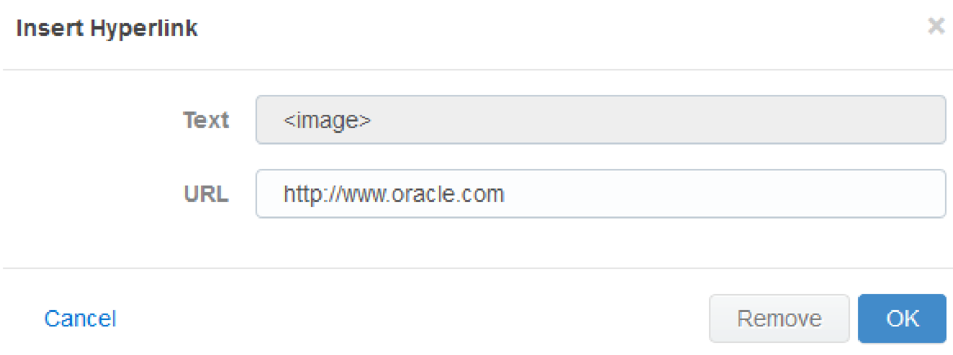
3. Select an image from the Oracle Eloqua image library or click **Upload** to browse your local device.

   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.

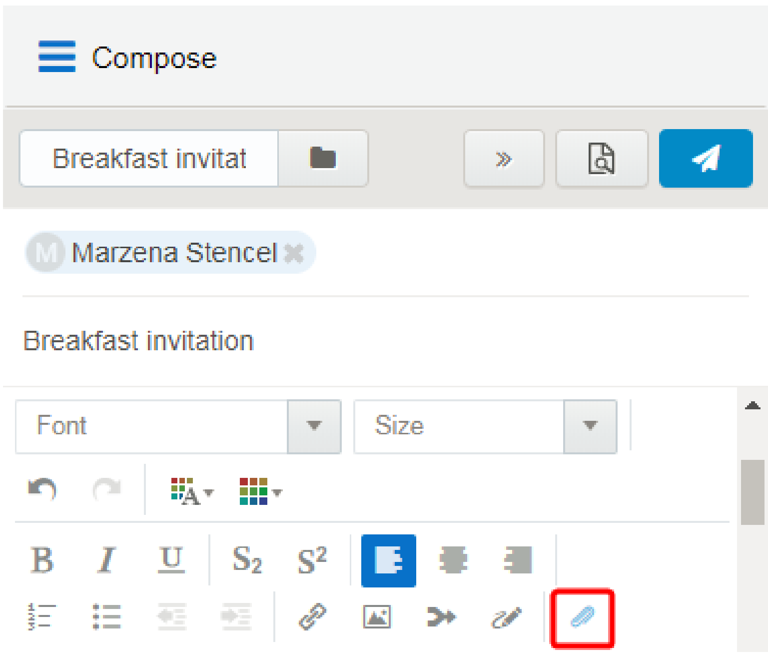
Attachments can be uploaded to a user specific Engage folder: engage-personal-folder-{userId}-{username} located in the root folder of Oracle Eloqua's File Storage library (Assets –> Components –> File Storage).

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:

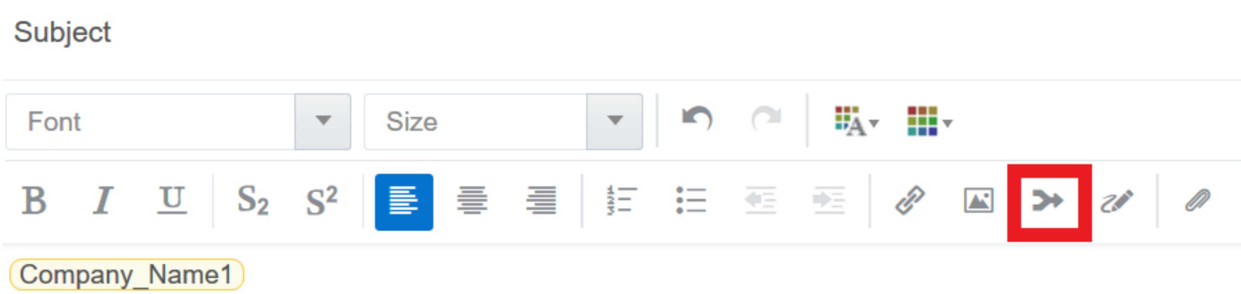
1. Create a new Engage email or open an Oracle Eloqua email template.
2. Click the **Attachment** icon in the toolbar.



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.

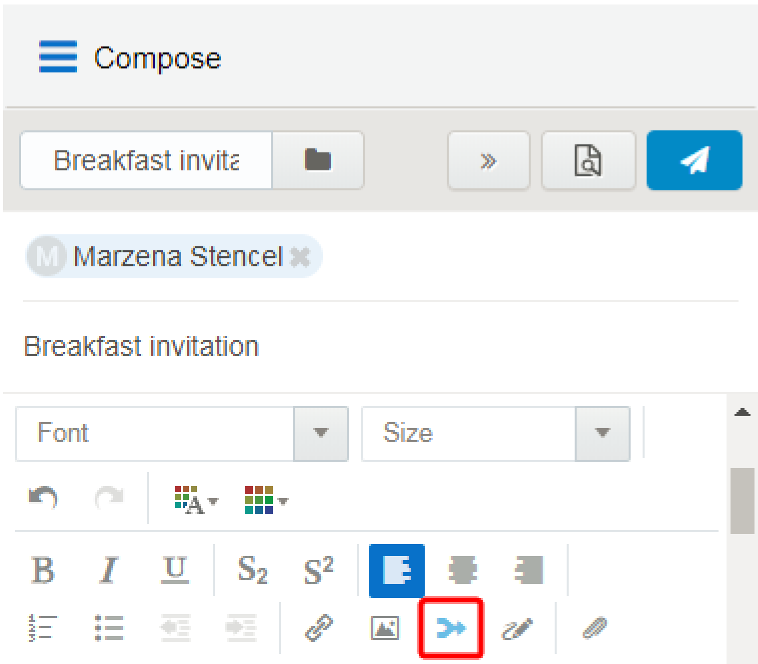
Adding field merges to Engage emails

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.

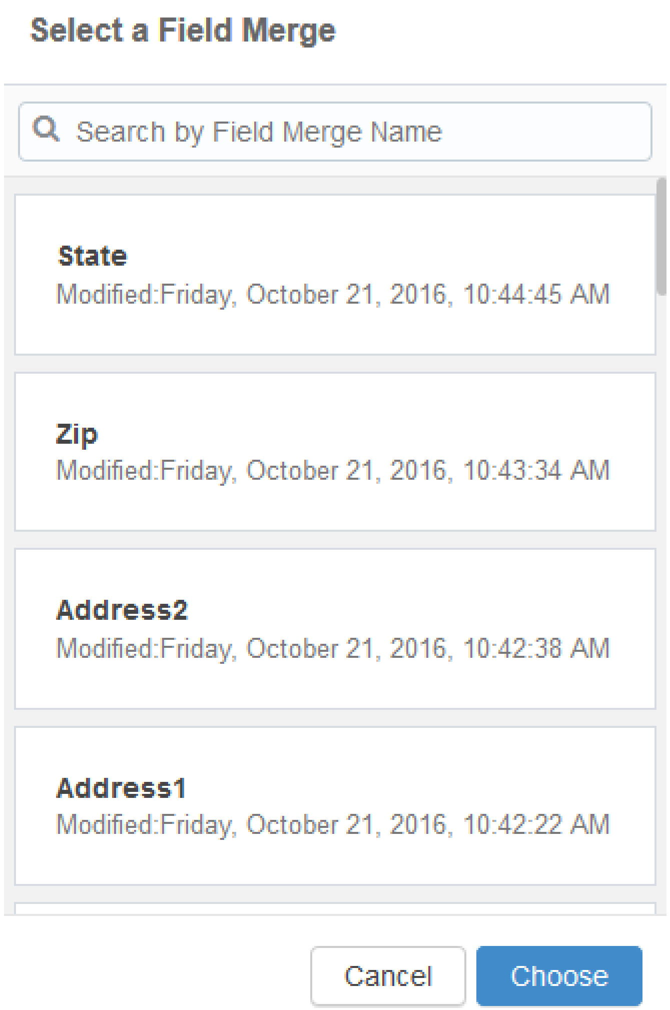


To add a field merge to an email:

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.

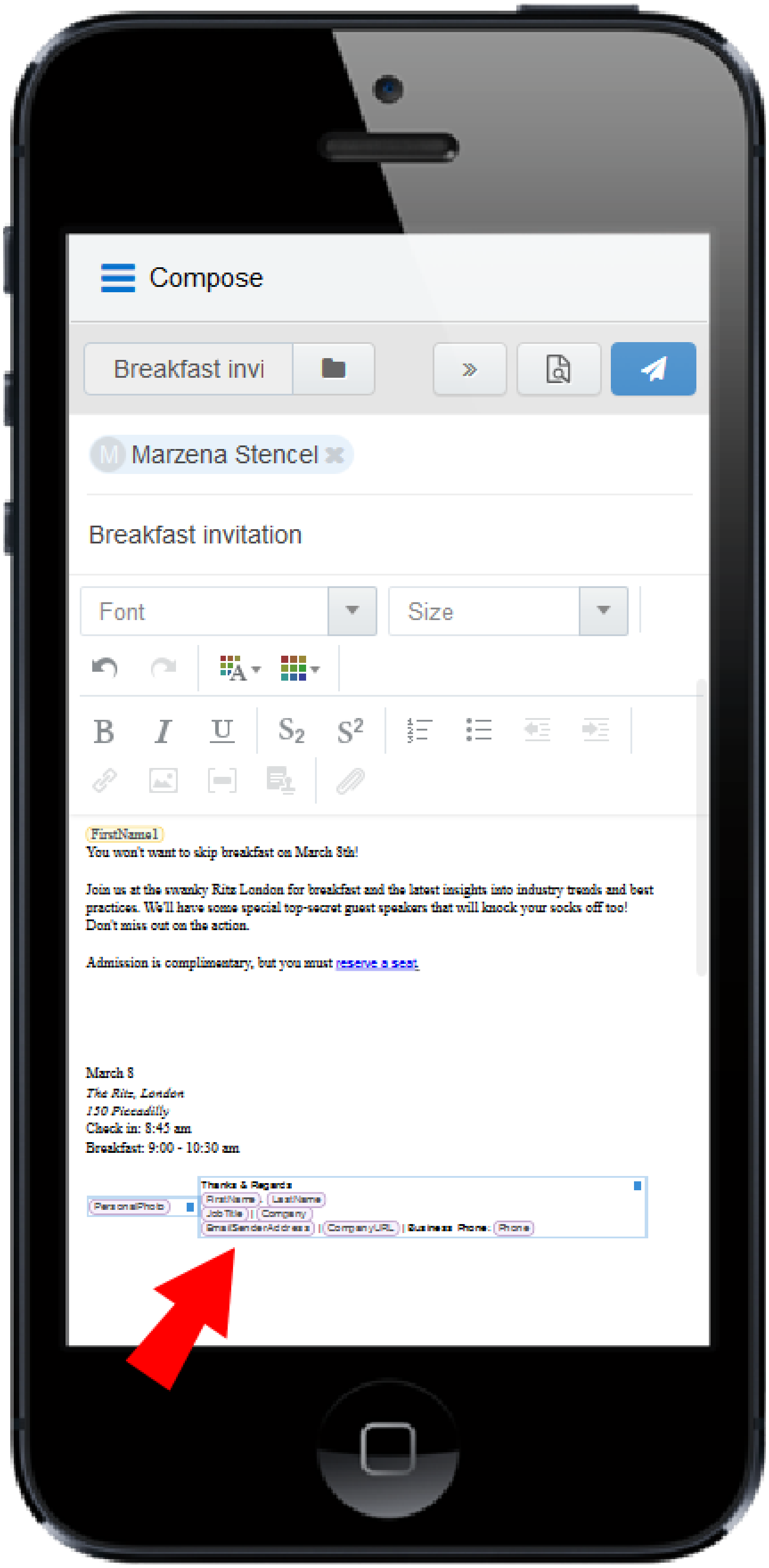
Adding signatures to Engage emails

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.

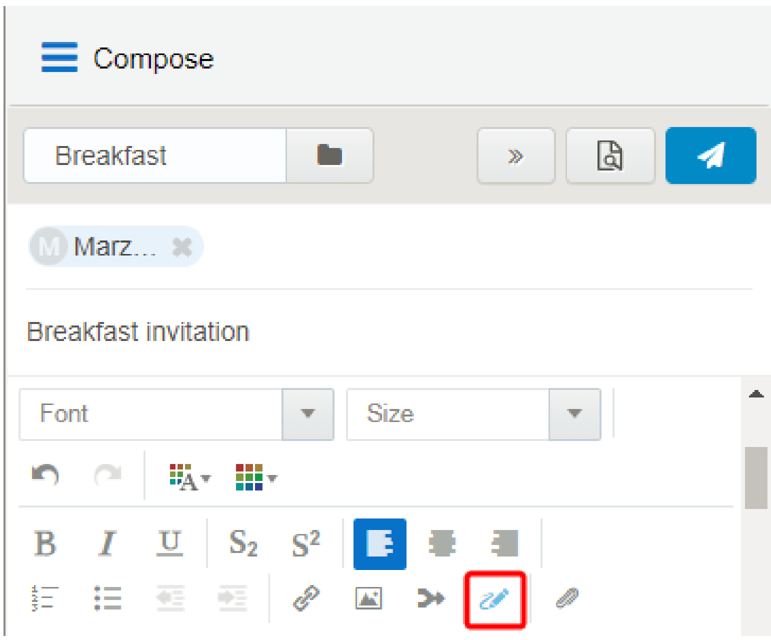
Prerequisites:

- 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.

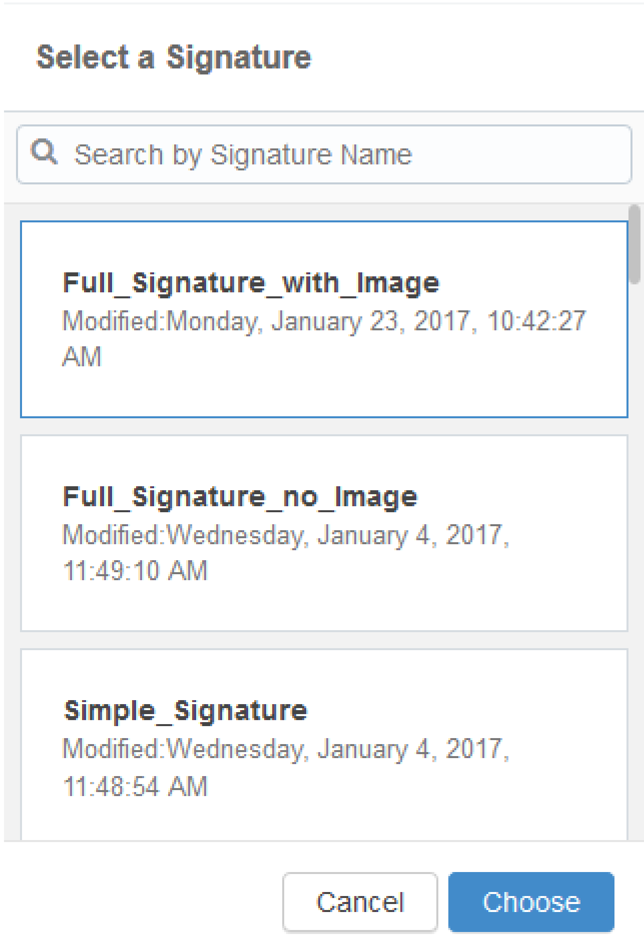

Compose
Breakfast invi
Marzena Stencel
Breakfast invitation
Font
Size
FirstName1
You won't want to skip breakfast on March 8th!
Join us at the swanky Ritz London for breakfast and the latest insights into industry trends and best practices. We'll have some special top-secret guest speakers that will knock your socks off too! Don't miss out on the action.
Admission is complimentary, but you must reserve a seat.
March 8
The Ritz, London
150 Piccadilly
Check in: 8:45 am
Breakfast: 9:00 - 10:30 am

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

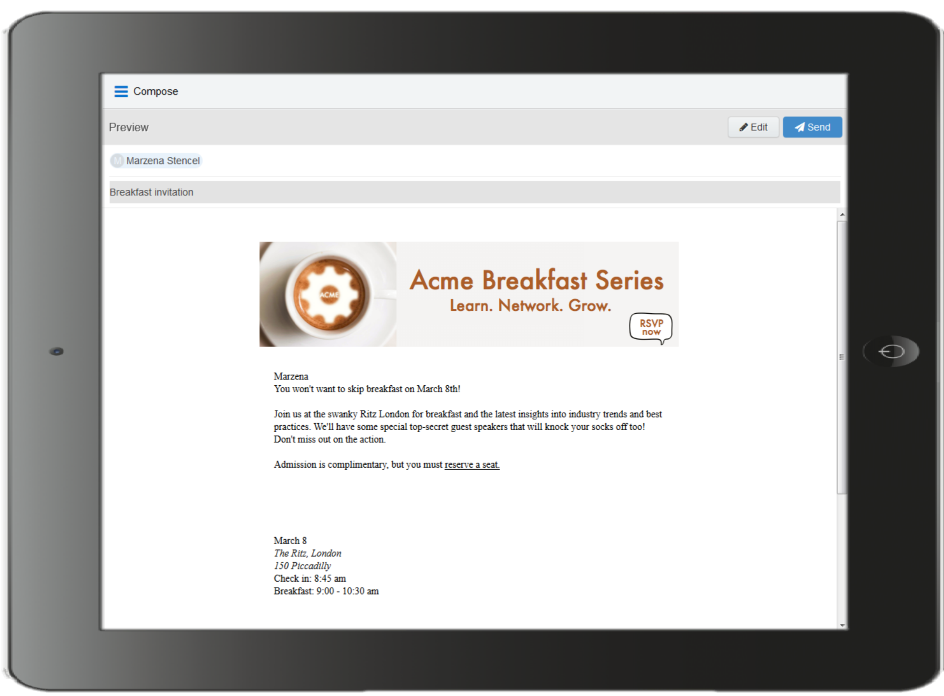
The preview feature allows you to validate the email content prior to sending, which saves time and helps maintain accurate reports compared to sending test emails to yourself or colleagues. The preview displays the email that will be sent to the first recipient and populates any necessary field merges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

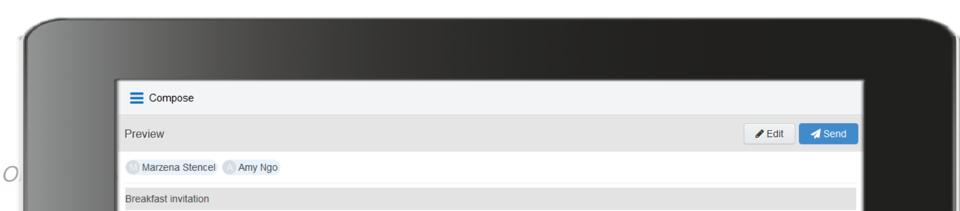
To preview an Engage email:

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

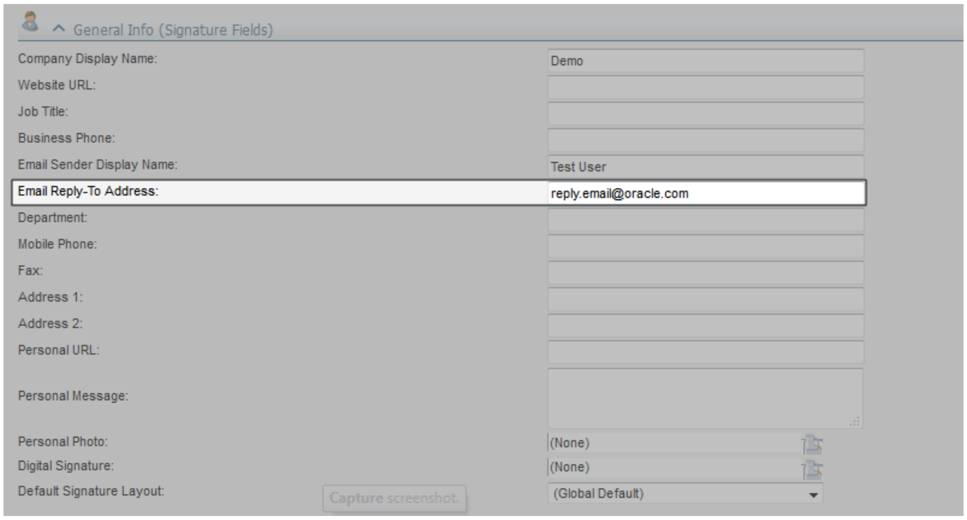
You can modify the email address that your Engage (and other Oracle Eloqua) emails will be sent from.

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**.

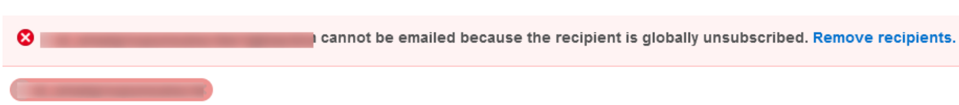
Troubleshooting Engage issues

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

Global unsubscribes

Problem

On the Engage compose screen, when adding an email address, an error appears indicating the contact is globally unsubscribed.



Cause

If a contact has unsubscribed from receiving all emails from your company, they are known to be globally unsubscribed. You cannot email a globally unsubscribed contact.

Resolving this issue

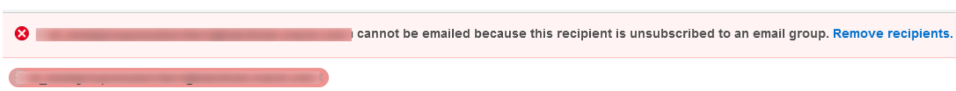
Remove the contact from your email.

You could use Profiler to identify alternate methods to reach out to this contact.

Group unsubscribes

Problem

After clicking send, an error appears indicating the contact is unsubscribed from the email group.



Cause

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 subscription 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

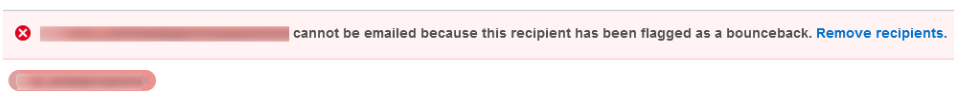
Since they have unsubscribed from that email group, you cannot send the email to them. The goal of email group subscriptions is to make it easier for your contacts to identify what they are interested in and keep them engaged with your organization. To avoid global unsubscribes, it is important to respect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

To resolve this issue, you can change the email template or change to a blank email if this has been enabled by your administrator.

Bouncebacks

Problem

After clicking send, an error appears indicating the contact's email address has bounced back.



Cause

The contact's email address is incorrect or bad.

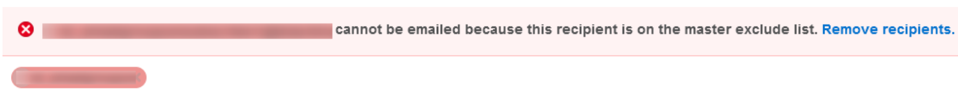
Resolving this issue

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. You could use Profiler to identify alternate methods to reach out to this contact.

Master exclude list

Problem

After clicking send, an error appears indicating the contact is on the master exclude list.



Cause

In Eloqua, there are some domains of specific organizations that you cannot send email to at all. For example, the master exclude list might include your competitors email domain.

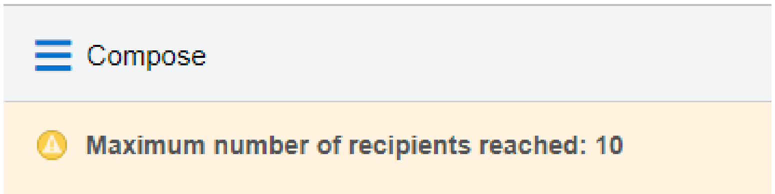
Resolving this issue

You cannot resolve this, and you must remove the contact from the email. Use Profiler to identify alternate contact methods.

Recipient limits

Problem

After adding multiple email addresses to a message, an error indicates the maximum recipients has been reached.



You can also receive a browser "414 Request - URI Too Large" error if you add a large number of recipients directly using the browser address bar.

Cause

Your administrator can configure how many recipients you can add to an email. Learn more about Engage app settings.

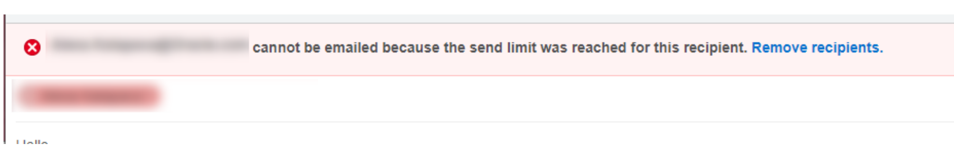
Resolving this issue

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

Send limits

Problem

After sending an email, an error indicates the maximum recipients has been reached.



Cause

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, the error message indicates a send limit being reached.

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.

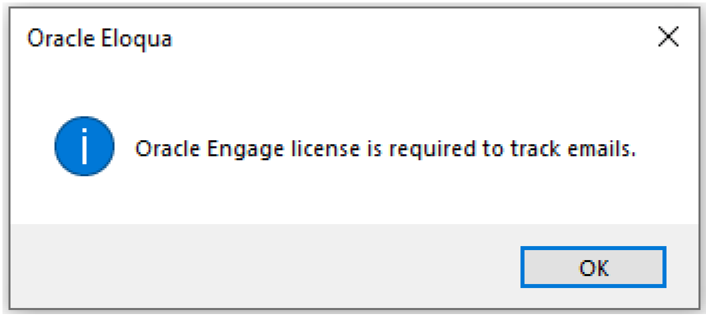
Emails with plus sign (+)

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.

Engage license error

Problem

When I try to turn on tracking using Oracle Eloqua Sales Tools for Microsoft Outlook, an Engage license error appears:



Cause

Your administrator has disabled the ability to use the Microsoft Outlook add-in. You are still permitted to use Engage, but you must use the web version instead.

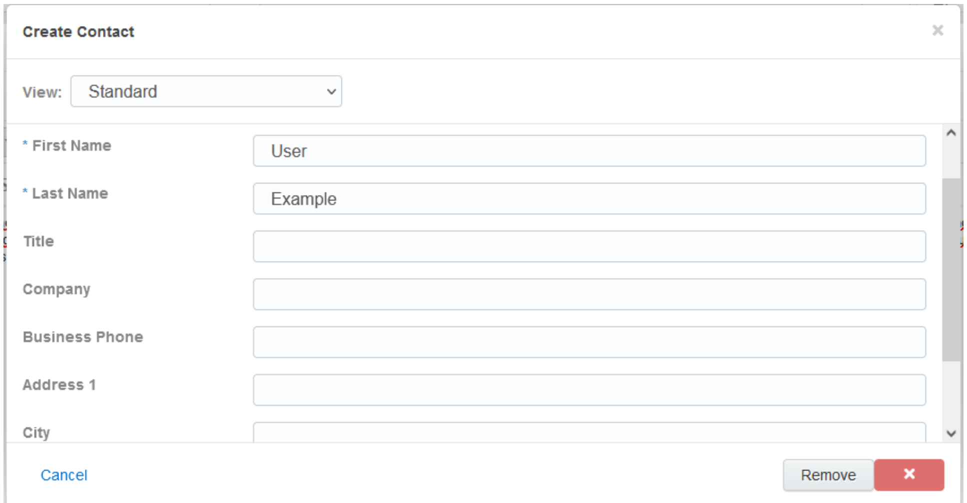
Solution

Speak to your administrator about accessing Engage using Microsoft Outlook, or other ways your are to access Engage, or use a URL listed here instead.

Cannot save a contact

Problem

When attempting to create a contact, the contact won't save, and no error message is displayed.



Cause

Your administrator determines whether you can create contacts or not. If your administrator disabled this feature, you cannot create any new contacts.

Solution

Remove the contact. Use Profiler to find other contacts at the same organization. You can also reach out to the contact by not using Engage.

Viewing email sent history

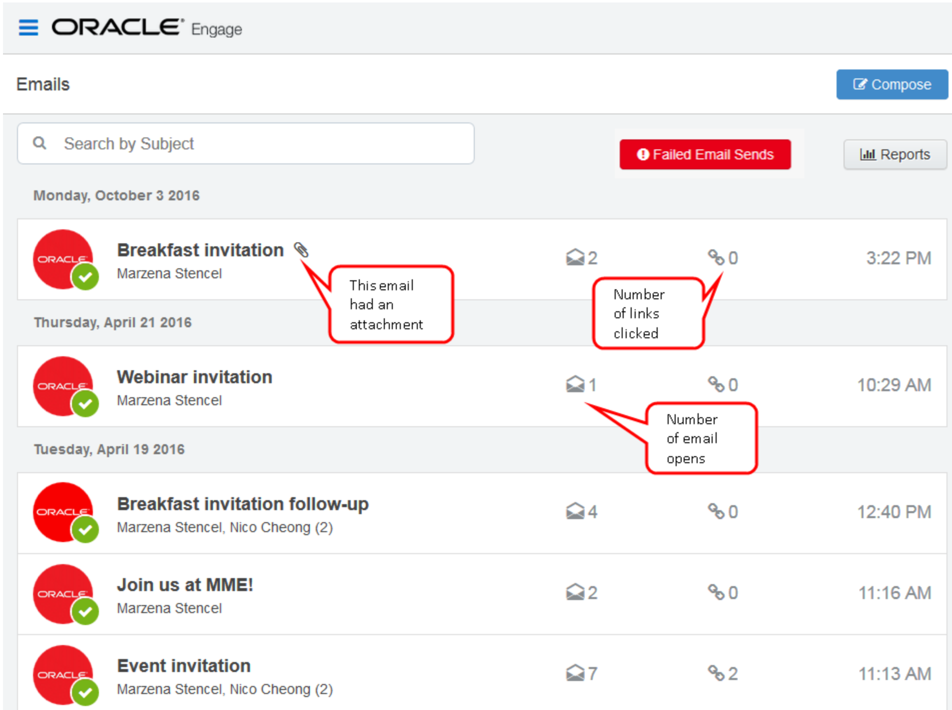
Your email sent history display the sent status of your previous emails. It is displayed when you log in to Engage and after you send an email.

To view email sent history:

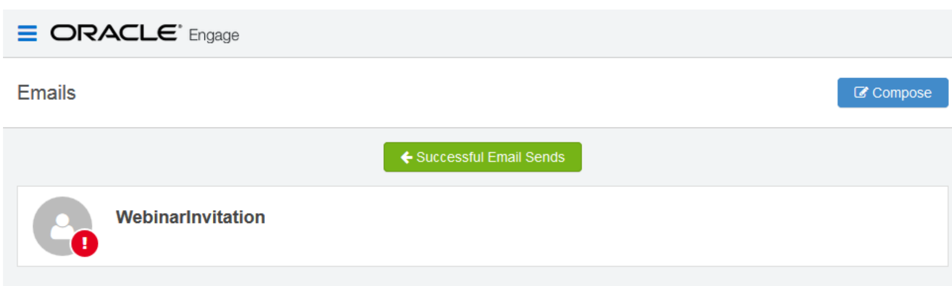
1. Navigate to the Engage home page using one of the following methods:
    - Logging in to Engage.
    - Click the Engage icon .
    - Sending an email.

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

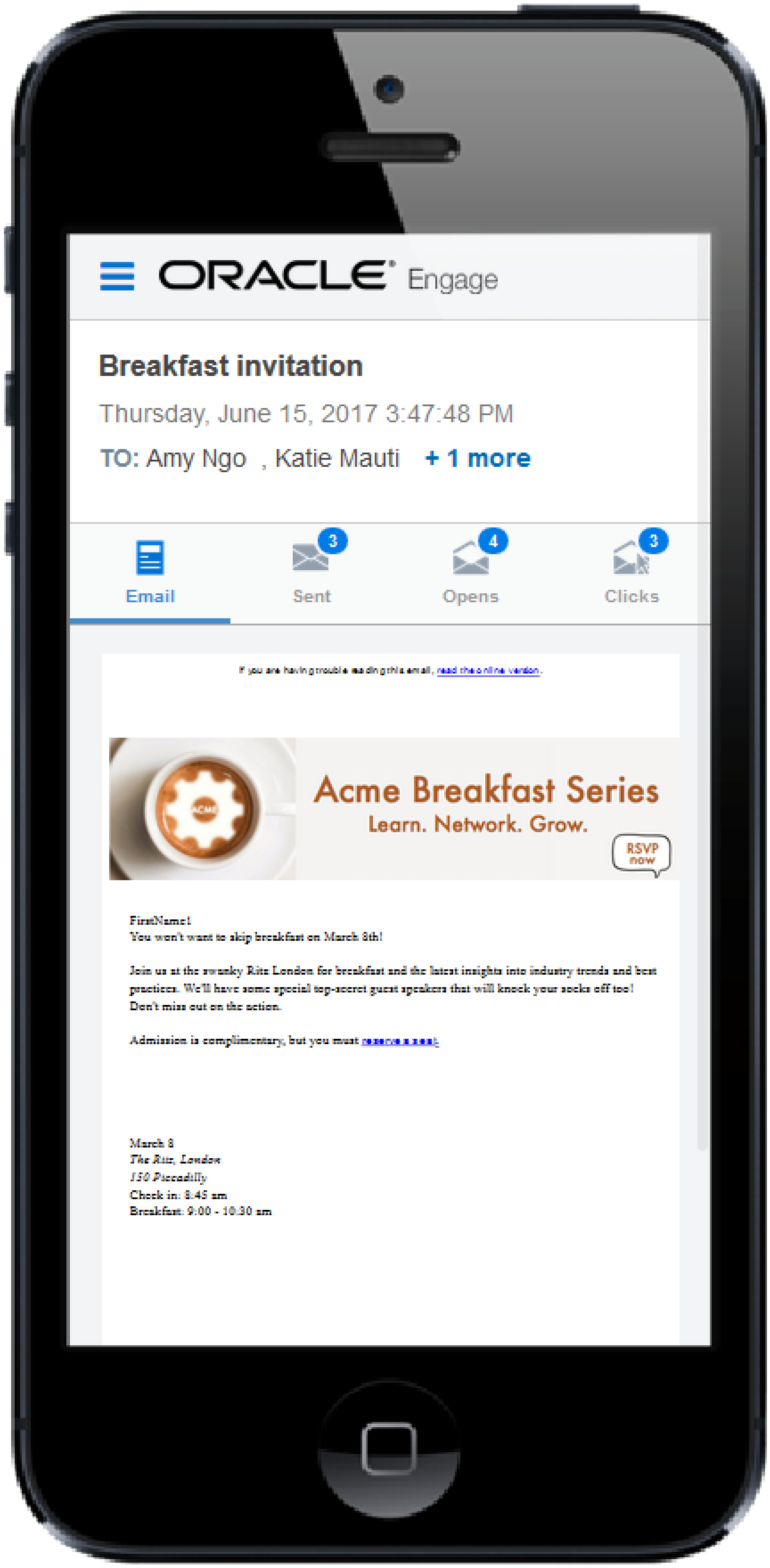
    - A green icon indicates the email was sent successfully to all recipients.
    - An orange icon indicates the email was sent successfully to some recipients.
    - A red icon indicates the email was not sent successfully to any recipients.

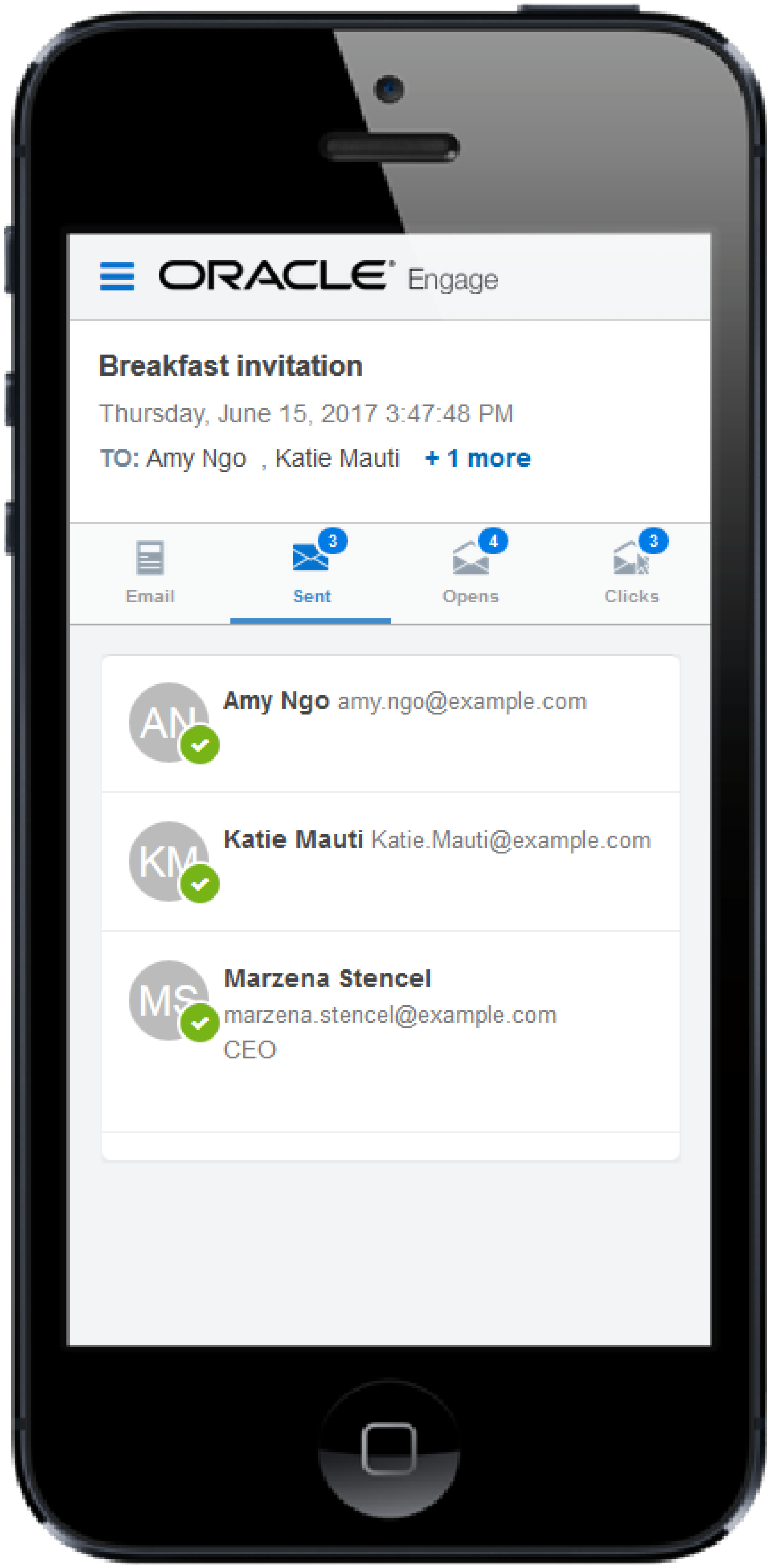


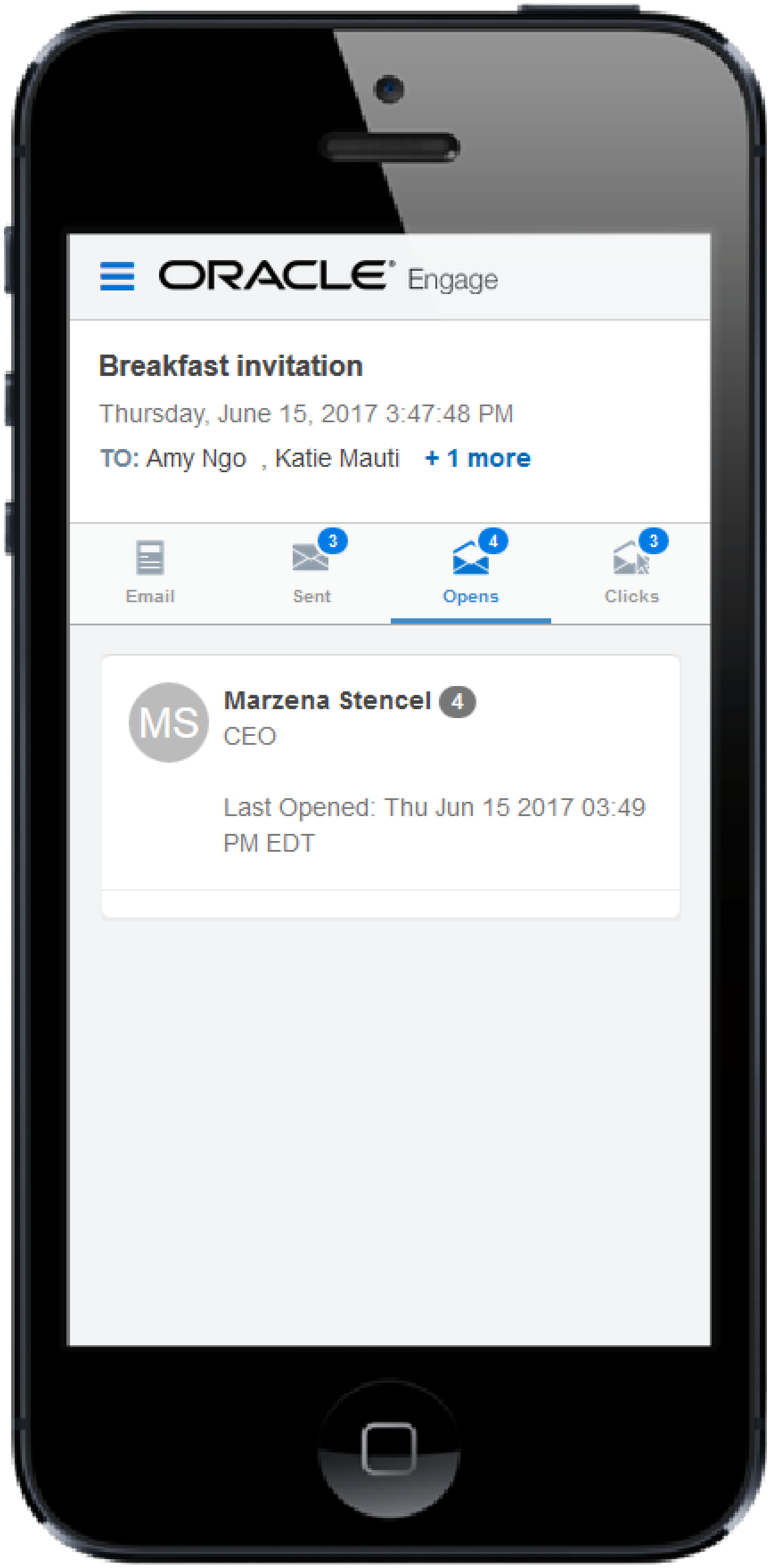
Click the **Failed Email Sends** button to view emails which did not send.

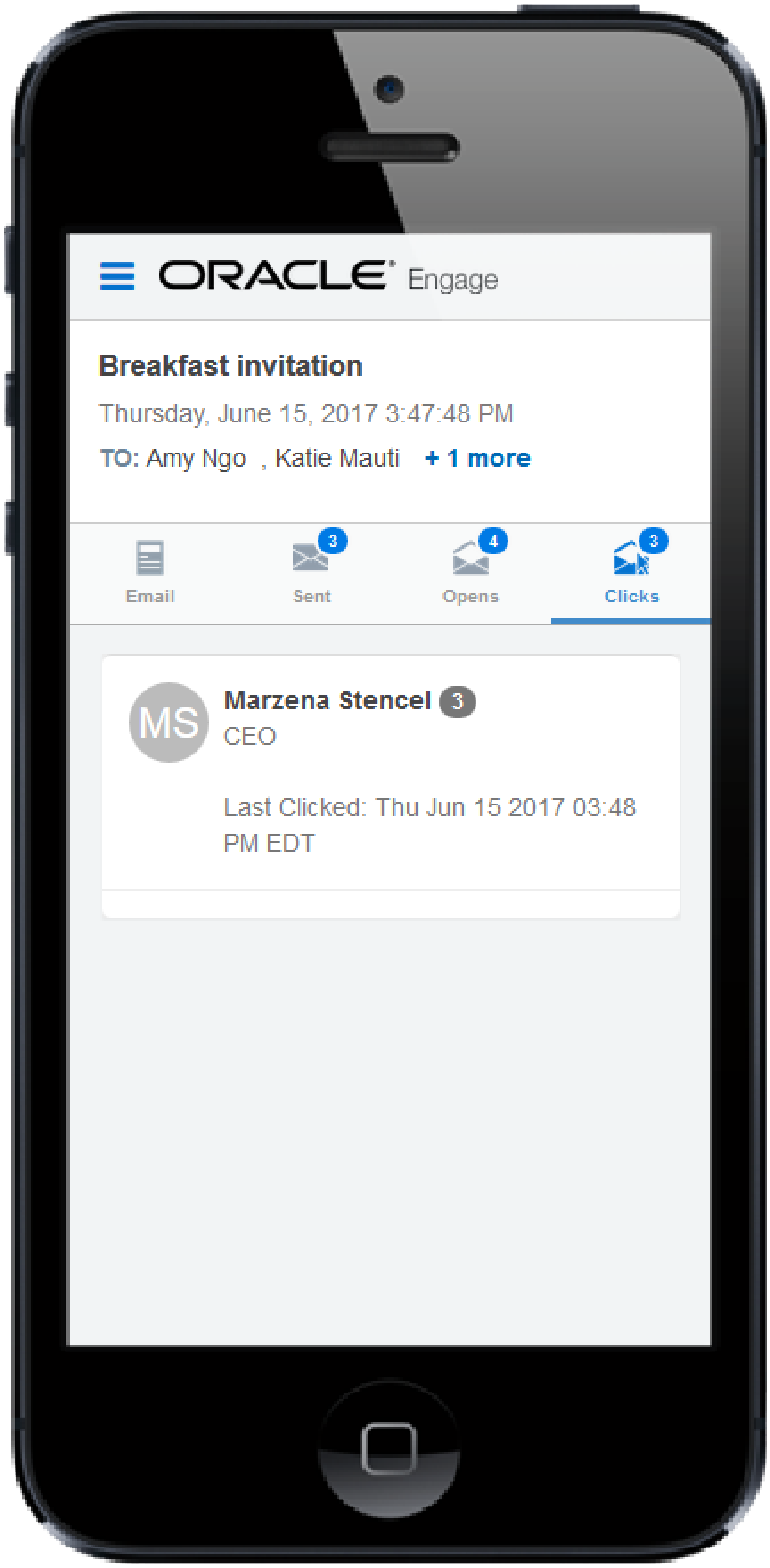


2. Select an email to view additional details. Explore the different tabs to learn more about your sent email.


ORACLE Engage
Breakfast invitation
Thursday, June 15, 2017 3:47:48 PM
TO: Amy Ngo , Katie Mauti + 1 more
3
4
3
Email
Sent
Opens
Clicks
If you are having trouble reading this email, read the online version.
Acme Breakfast Series
Learn. Network. Grow.
RSVP now
FirstName1
You won't want to skip breakfast on March 8th!
Join us at the swanky Ritz London for breakfast and the latest insights into industry trends and best practices. We'll have some special top-secret guest speakers that will knock your socks off too! Don't miss out on the action.
Admission is complimentary, but you must reserve a seat.
March 8
The Ritz, London
150 Piccadilly
Check in: 8:45 am
Breakfast: 9:00 - 10:30 am


ORACLE Engage
Breakfast invitation
Thursday, June 15, 2017 3:47:48 PM
TO: Amy Ngo , Katie Mauti + 1 more
Email
3
Sent
4
Opens
3
Clicks
AN
Amy Ngo amy.ngo@example.com
KM
Katie Mauti Katie.Mauti@example.com
MS
Marzena Stencel
marzena.stencel@example.com
CEO


ORACLE Engage
Breakfast invitation
Thursday, June 15, 2017 3:47:48 PM
TO: Amy Ngo , Katie Mauti + 1 more
Email
3 Sent
4 Opens
3 Clicks
MS
Marzena Stencel 4
CEO
Last Opened: Thu Jun 15 2017 03:49 PM EDT

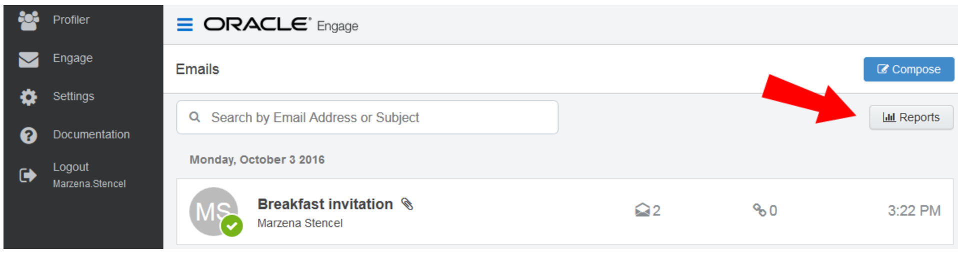

ORACLE Engage
Breakfast invitation
Thursday, June 15, 2017 3:47:48 PM
TO: Amy Ngo , Katie Mauti + 1 more
Email
3
Sent
4
Opens
3
Clicks
MS
Marzena Stencel 3
CEO
Last Clicked: Thu Jun 15 2017 03:48 PM EDT

- *Emails* tab: Displays a thumbnail image of your email.
- *Sent* tab: Displays the recipients of the email. If you have a Profiler license, you can click a recipient's name to view additional details.
- *Opens* tab: Displays the recipients who opened the email. Learn more about how email opens are calculated.
- *Clicks* tab: Displays the recipients who clicked a link in the email.

Engage reports

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

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



There are two Engage report types available:

- Engage top templates report
- Engage emails by recipient report

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

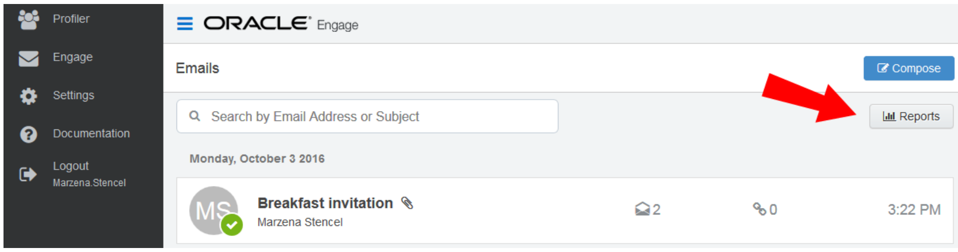
Engage top templates report

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.

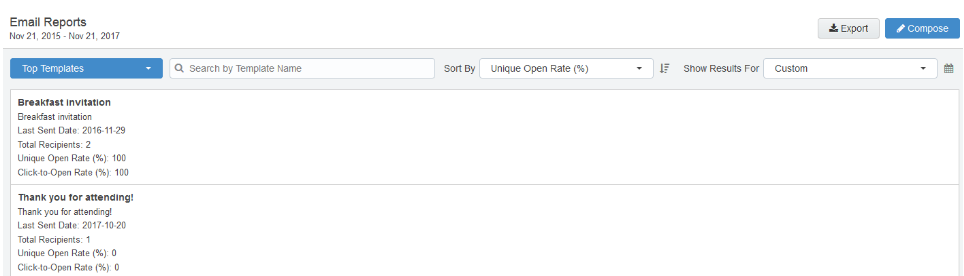
2. Click **Reports** on the sent emails page.



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

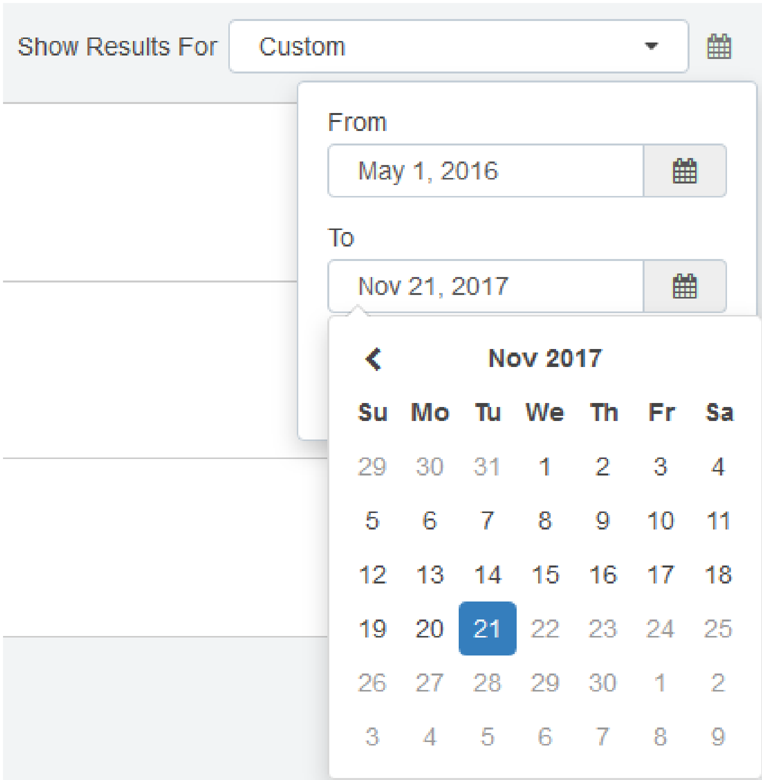
The report displays emails sent by the logged-in user.



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.

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

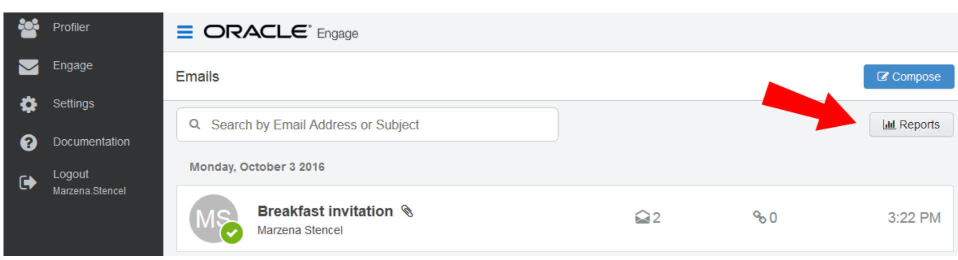
Metric	Description
	Oracle Eloqua counts an email as opened if the recipient loaded the tracking pixel image contained in the email or clicked a link in the email. Learn more about how email opens are calculated.
Click-to-open rate	Clicked sends / opened sends. Both clicked sends and opened sends ignore 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.

Engage emails by recipient report

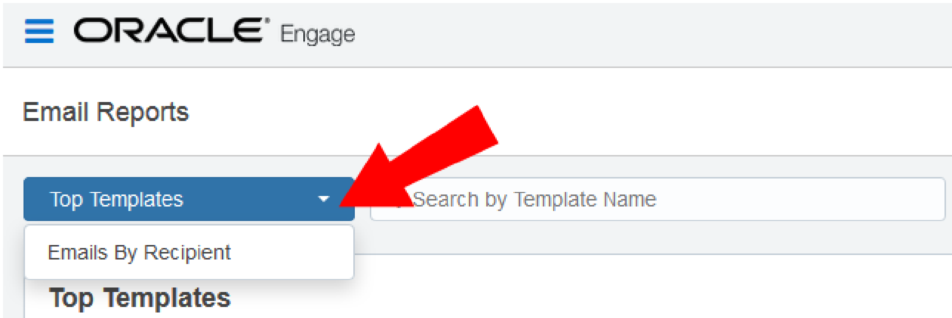
The Engage emails by recipient report provides information about who has opened and clicked on the emails you have sent over a given period of time.

To access the emails by recipient report:

1. Open Engage.
2. Click **Reports** on the sent emails page.



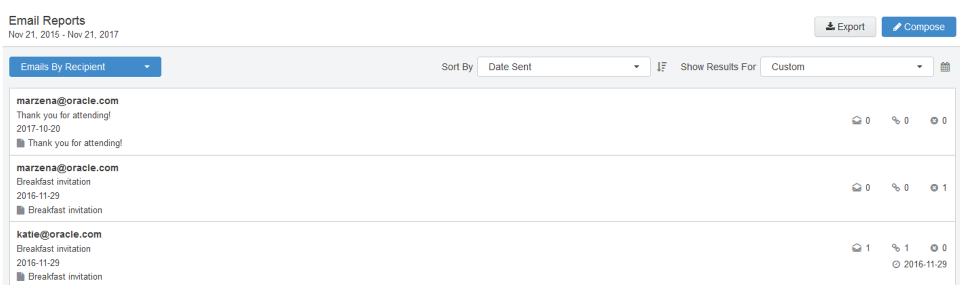
3. Click the **Top Templates** drop-down and select **Emails By Recipient**.



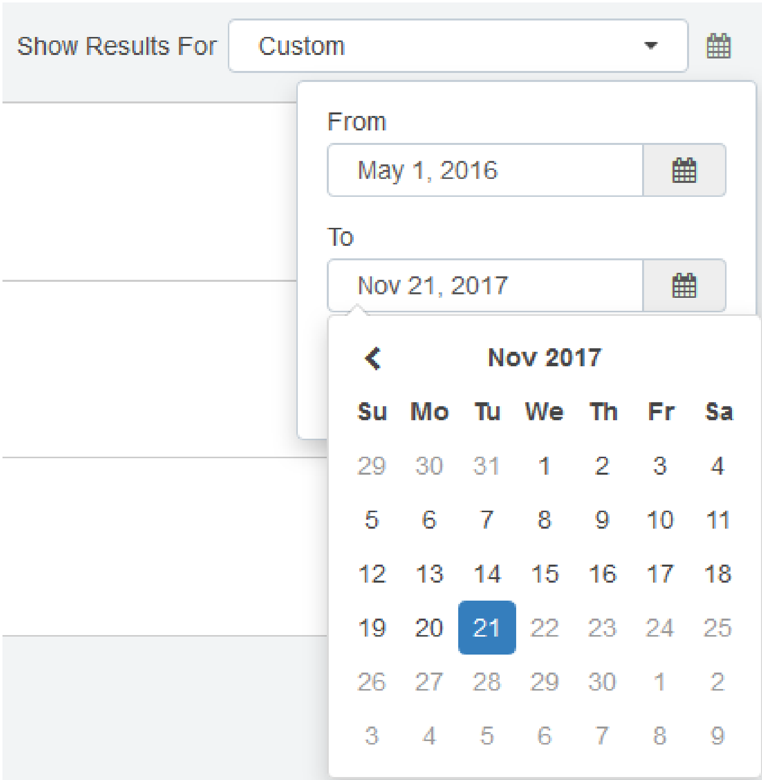
Tip: You can select one or more recipients from this report and send a new email to them. Select your recipients and click **Compose**. Then select your template and create your email.

Report filters

The report displays a list of recipients for your sent emails. Emails sent to multiple recipients are listed individually.



Use the date picker to limit the number of email recipients displayed. Use the list's standard time frames or enter a custom date by clicking the calendar icon. The default time frame is **Last Week**.



Results are sorted starting with the most recently sent email by default. Use the *Sort By* drop-down to sort by a different metric.

Report metrics

This report captures the following metrics.

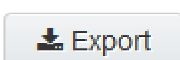
Metric	Description
Total opens	The number of times an email was opened. This includes multiple opens by the original recipient or forwarded recipient. Oracle Eloqua counts an email as opened if the recipient loaded the tracking pixel image contained in the email or clicked a link in the email. For more information, see

Metric	Description
	Calculating email opens.
Total clicks	The total clickthroughs. This includes multiple clicks by the same recipient. System Action links are not tracked.
Hard bouncebacks	The total emails that returned a hard bounceback. A hard bounce is an email that permanently could not be delivered. Some common reasons for hard bounces include an invalid email address or domain name.

Exporting Engage report results

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

To export Engage report results:

1. Open either the Top Templates or Emails By Recipient report.
2. Use filters to narrow your results. Only the results matching your filer criteria will be exported.
3. Click **Export** 

.
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.

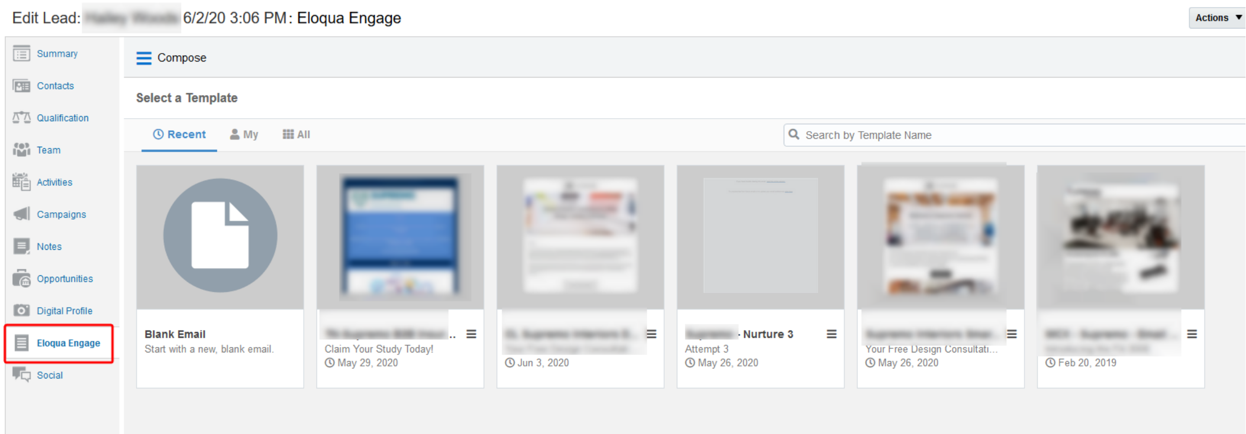
Engage activities, including full emails, can be synched over to your CRM. The time it takes for a new contact or template to appear in your CRM depends on the integration rules setup between your Eloqua instance and your CRM.

You can 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 Sales

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

To enrich the user experience when working in Oracle 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 Oracle Sales.



Prerequisites:

- Build an allowlist of the domains that will be hosting embedded Engage pages. Learn more in the Configuring Engage topic.
- Determine the Oracle Eloqua login URL you want to use. You can use the simplified login URL or a specific legacy URL based on the desired login method. Learn more. The steps below assume you are using the simplified login URL.

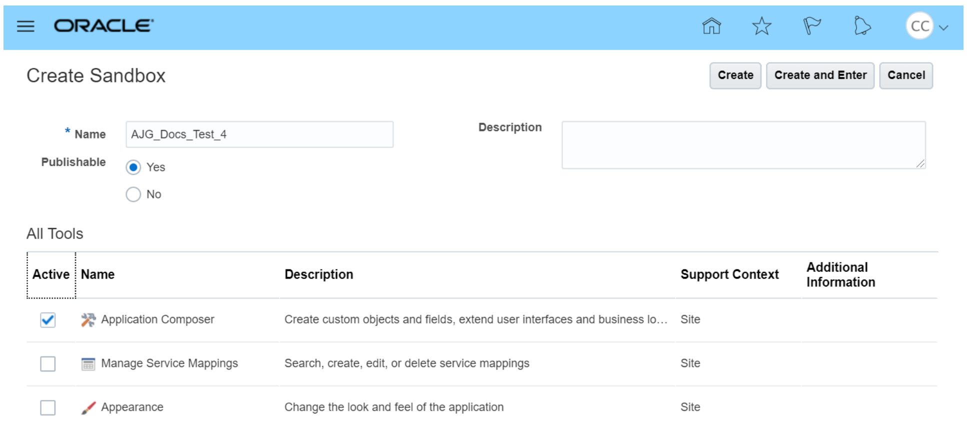
There are five steps to creating an Engage subtab in Oracle Sales:

1. Creating a sandbox
2. Creating mashup content
3. Adding the mashup content to a standard object in Oracle Sales
4. Publishing your sandbox

Step 1: Creating a sandbox

To create a sandbox:

1. Log in to Oracle 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**.



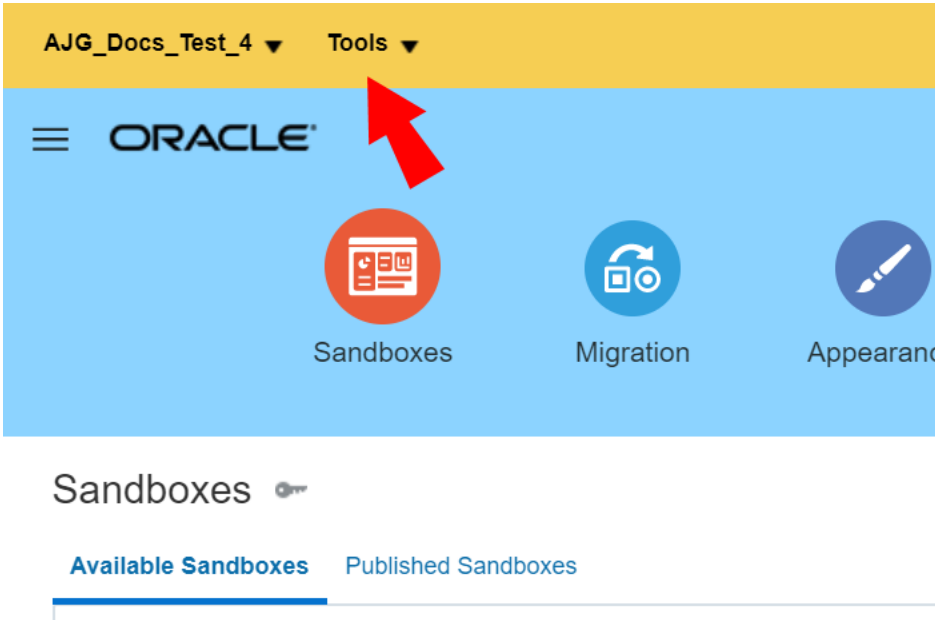
5. Click **Create and Enter**.

   You'll be redirected to the *Available Sandboxes* page.

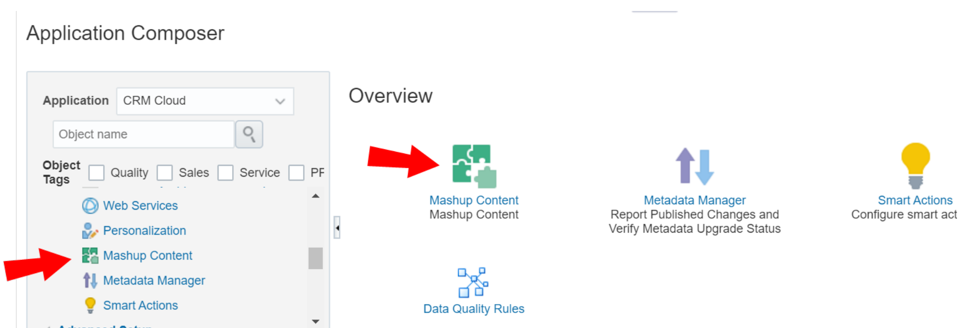
Step 2: Creating mashup content

To create mashup content:

1. At the top of the page, click **Tools** > **Application Composer**.



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*.

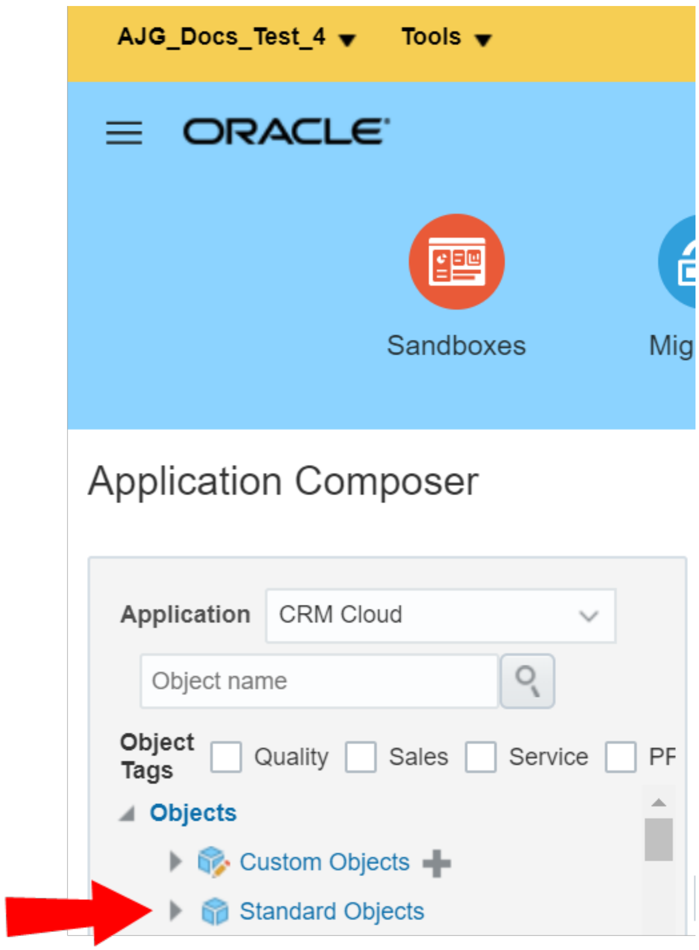


3. Configure the following options:
   - Give your web application a name. For example, Eloqua Engage.
   - Select **Groovy expression**.
4. Click **Save and Close**.

Step 3: Adding the mashup content to a standard object

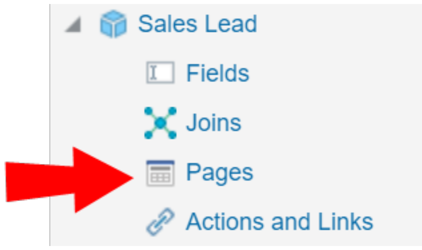
To add the mashup content to a Contact or Sales Lead object:

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.



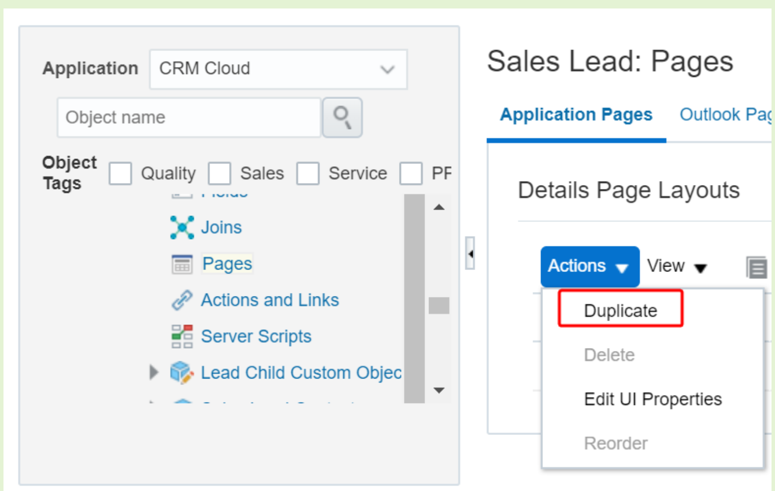
In this topic, we'll expand the **Sales Lead** object.

2. Click **Pages**.

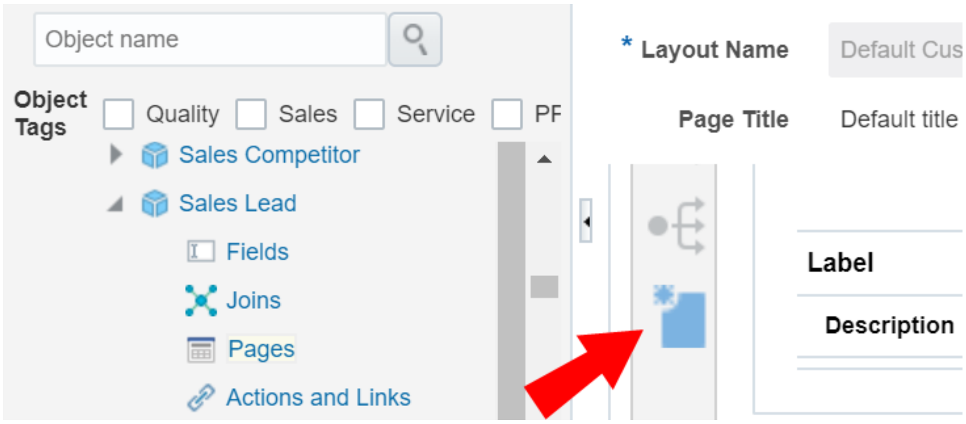


3. In the *Application Pages* tab, scroll down to the **Details Page Layouts** section, and click **Default Custom Layout**.

Note: If you do not see the *Default Custom Layout* you can add it by duplicating an existing layout. For example, duplicate the *Standard layout*, 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*.

8. In the Edit Script area, insert the following script:

```
if (PrimaryContactEmailAddress != null) {

    return "https://login.eloqua.com/siteLogin?SiteName=
{CompanyName}&ReturnUrl=/apps/embed/salesTools/engage/compose?emailAddress="
+ PrimaryContactEmailAddress;

}

else {

    return "https://login.eloqua.com/siteLogin?SiteName=
{CompanyName}&ReturnUrl=/apps/embed/salesTools/engage/compose";
```



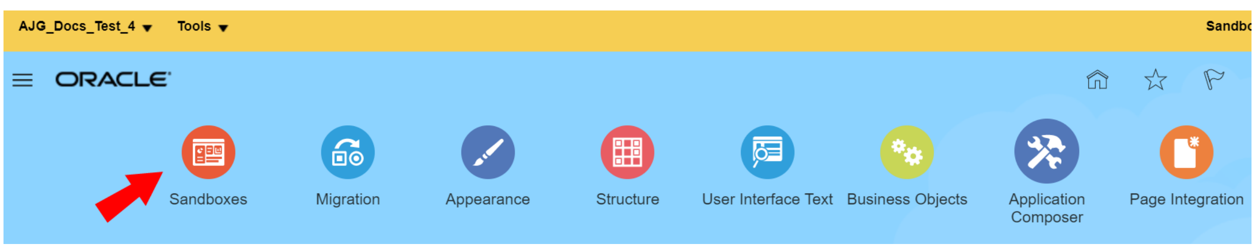
```
}
```

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

9. (Optional) Click **Next**. The *Next* option only appears if there are other details page layouts available to add the subtab to.
10. Click **Save and Close**.
11. **Done**.

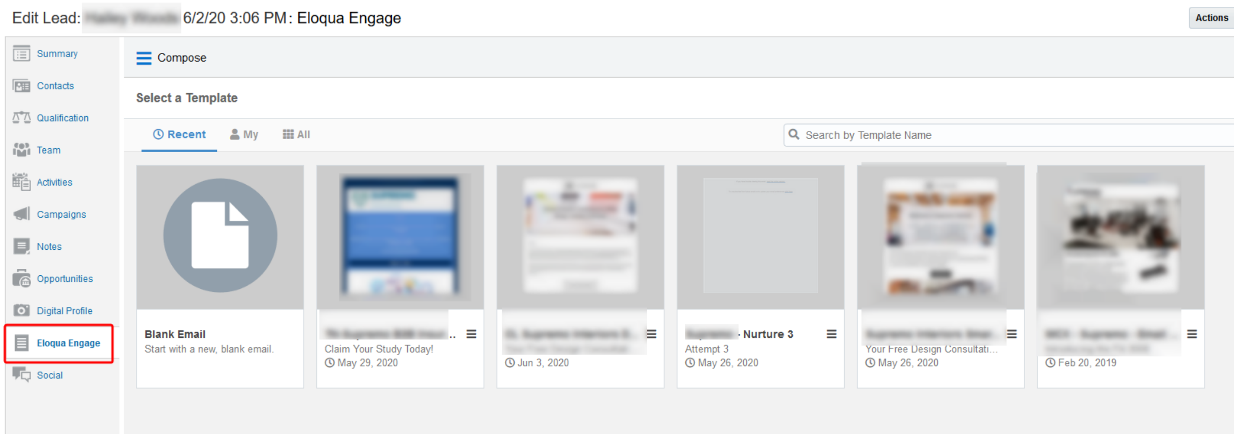
Step 5: Publishing your sandbox

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 Oracle Sales. Make sure to also confirm that the URL you are using is correct.

Adding an Engage link to Oracle Sales

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

1. Create an Engage link
2. Add the Engage link to a layout

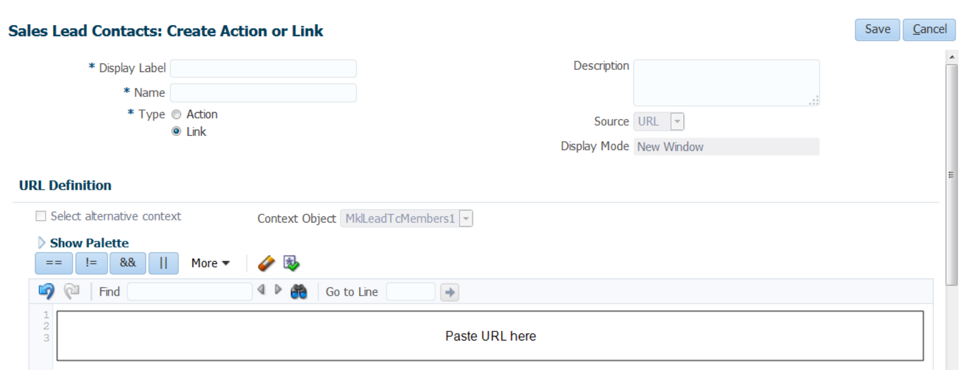
Step 1: Creating an Engage link

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 the simplified login URL:

      `def eURL="https://login.eloqua.com/siteLogin?SiteName={CompanyName}&ReturnUrl=/apps/embed/salesTools/engage/compose"`

      To use the legacy URLs, replace the `eURL` value above with the Legacy login URLs



6. Customize the Engage URL with parameters that support the desired experience for your sales users. Learn more.

> **Tip**: To pass the email address of the contact, use the following updated URL `defeURL="https://login.eloqua.com/siteLogin?SiteName={CompanyName}&ReturnUrl=/apps/embed/salesTools/engage/compose?sendTemplateToContacts/" + nvl(PersonEmail,"no email"`.

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

Step 2: Adding the Engage link to layouts

To add the Engage link to a layout:

1. In the *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 the *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**.

Add Engage to Oracle Sales Redwood User Experience

To add Oracle Eloqua Engage in Oracle Sales in the Redwood User Experience, you can create custom smart actions that navigate users to Eloqua Engage.

There are three steps to launching Engage in Oracle Sales Redwood User Experience:

1. Create a sandbox
2. Create a smart action
3. Publish a sandbox

Step 1: Create a Sandbox

1. Log in to Oracle 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: Create a smart action

1. In **Application Composer**, click **Smart Actions**, available under *Common Setup*.
2. On the **Smart Actions** page, click **Create**. Application Composer displays the *Create Smart Action* guided process in a new browser tab.
3. On the **Kind of Action** page:

a. Click **UI-based action**.

b. Click **Continue**.

4. On the **Basic Details** page:

    a. In the **Name** field, enter a display name **Eloqua Engage** for the action

    b. In the **Object** field, select the **Contact** object for which you're creating the action. If you are embedding Engage for Leads, then select the **Sales Lead** object

    c. In the **Action ID** field, accept the automatically generated value or enter a unique value. This value must be unique across all smart actions

    d. Click **Continue**.

5. On the **Availability** page:

    a. In the **Application** field, select the **Sales** application where the action will display

    b. In the **UI Availability** field, select the **List Page** where the action will display in addition to the Action Bar

    c. *Optional* - In the **Role Filter** field, optionally select the custom roles that can view the action. (If you don't select a role, then the action will be available to all roles). For details see Create UI-Based Smart Actions

    d. *Optional* - In the **Condition** region, optionally set conditions for the action to appear, such as only if a certain field's value is set to a particular value. For example, show a smart action only if a lead's status is Hot. For details see Create UI-Based Smart Actions.

6. On the Action Type Page:

    a. In the **Type** field, specify the type of action, **Navigate to URL**.

    b. In the **URL** field, insert the following **URL**:

    https://login.eloqua.com/siteLogin?SiteName={EloquaCompanyName}&ReturnUrl=/apps/salesTools/engage/compose?emailAddress=${EmailAddress}

    c. If you are adding Eloqua Engage to Contacts:

In the **Value** column for *EmailAddress* in the Field Mapping section, select Email (EmailAddress)

d. If you are adding Eloqua Engage to Sales Leads:

   In the **Value** column for *EmailAddress* in the Field Mapping section, select ContactEmail (PrimaryContactEmailAddress).

e. In the Browser Window Target field, specify **New tab**.

7. On the **Action Details** page, leave it blank and click **Continue**.

8. On the **Confirmation Message** page, leave it blank and click **Continue**.

9. On the **Review and Submit** page, review the action's configuration and click **Submit** when ready.

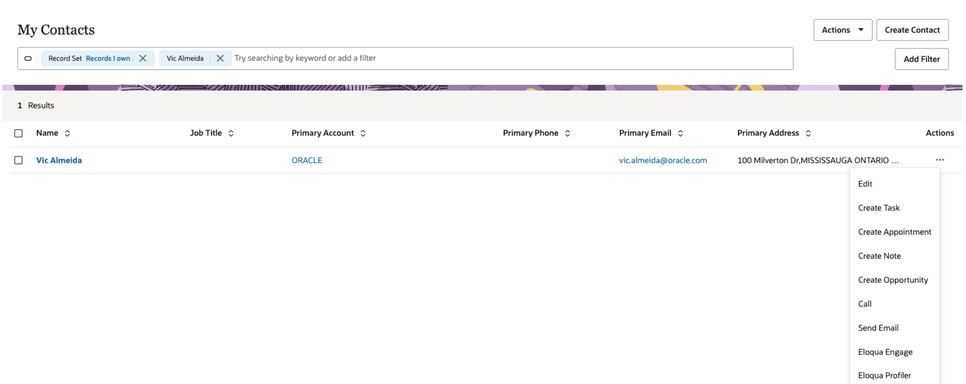
Step 3: Publish a Sandbox

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

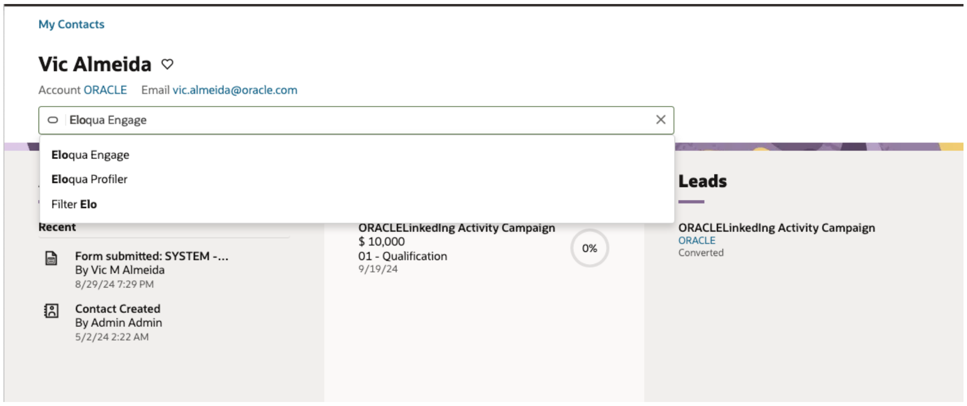
2. Click **Publish**.

After following these steps for Engage, you will now be able to see Engage from the object list in the action drop down menu. For example, if you we created a Smart Action for the Sales Lead object, then you will be able to see Engage for a Sales Lead from the action menu when a specific lead is selected.

After Completion, you should find the smart Action available for selection.



Additionally the Smart Actions would be available to launch from a contact record.



Embedding Engage as a tab or button in Salesforce Classic

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

This section will walk you through making Engage 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:

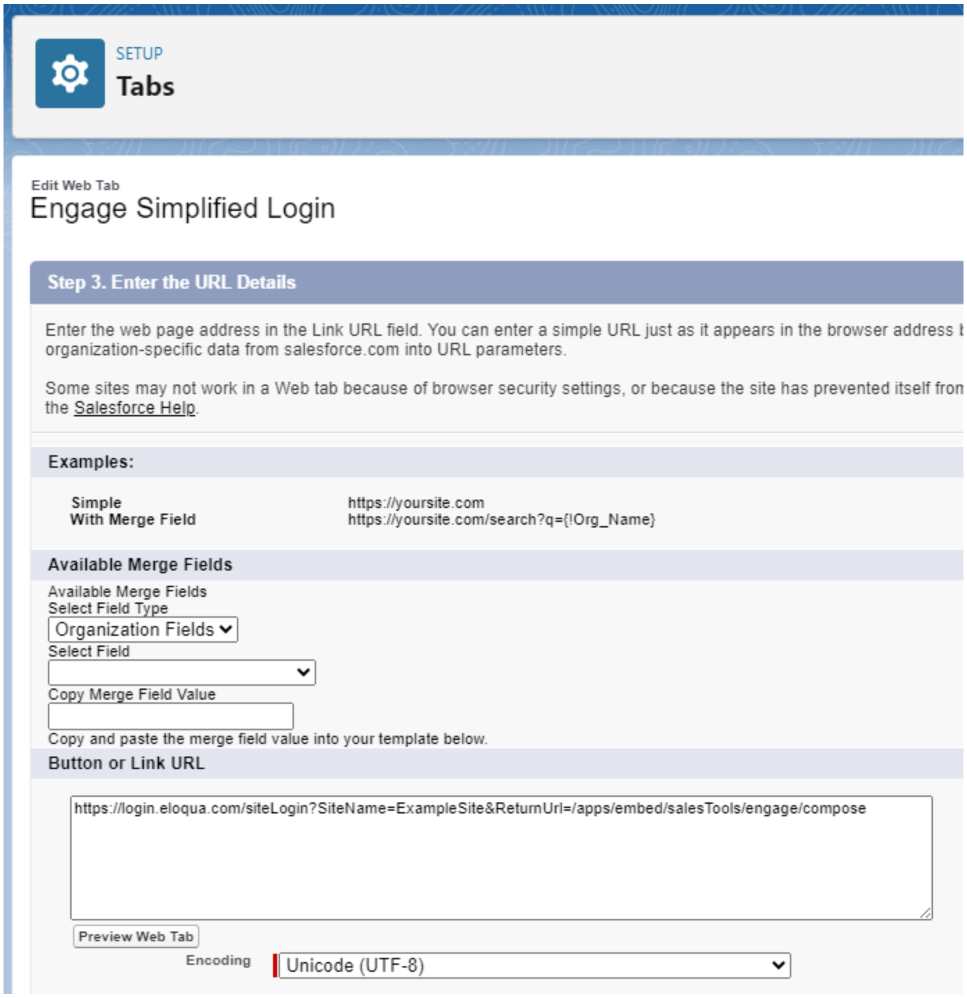
- Build an allowlist of the domains that will be hosting embedded Engage pages. Learn more in the Configuring Engage topic.
- Determine the Oracle Eloqua login URL you want to use. You can use the simplified login URL or a specific legacy URL based on the desired login method. Learn more.

To embed Engage as a tab in Salesforce Classic:

1. Log in to Salesforce.
2. Navigate to **Setup** and search for **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:
   - Simplified login URL: https://login.eloqua.com/siteLogin?SiteName={CompanyName}&ReturnUrl=/apps/embed/salesTools/engage/compose
   - To use the legacy URLs, see Legacy login URLs
6. Save your changes. You should now be able to click on the **Engage** tab and be logged in seamlessly to Engage.



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:

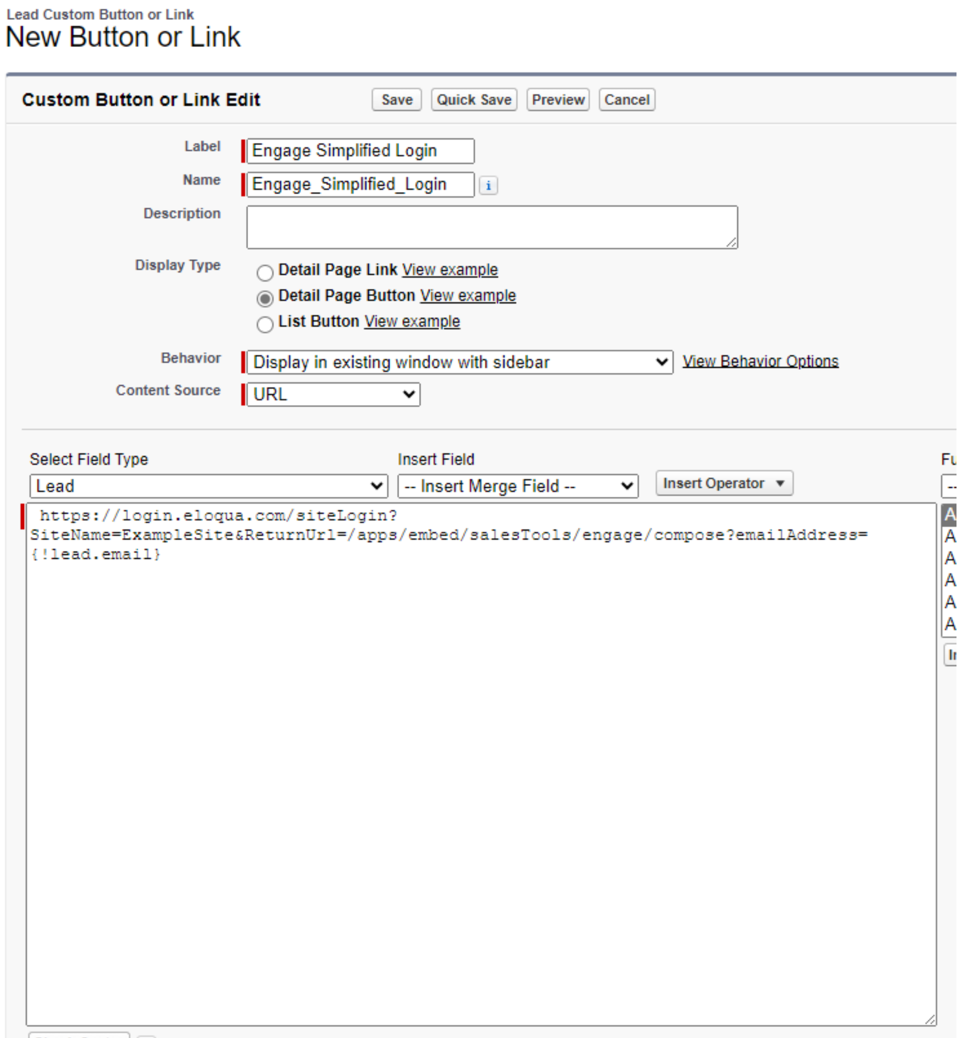
- Build an allowlist of the domains that will be hosting embedded Engage pages. Learn more in the Configuring Engage topic.

- Determine the Oracle Eloqua login URL you want to use. You can use the simplified login URL or a specific legacy URL based on the desired login method. Learn more.

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. Click **New Button or Link** to start with a fresh button.
4. 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:
        - Simplified login URL: `https://login.eloqua.com/siteLogin?SiteName={CompanyName}&ReturnUrl=/apps/embed/salesTools/engage/compose`
        - To use the legacy URLs, see Legacy login URLs.
    e. Customize the Engage URL with parameters that support the desired experience for your sales users. Learn more.

> **Tip**: To pass the email address of the lead, add the following parameter to the URL `emailAddress={!lead.email}`. For contact object, use `emailAddress={!contact.email}`.



5. 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 you through making Engage 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 Oracle Eloqua login URL you want to use. You can use the simplified login URL or a specific legacy URL based on the desired login method. Learn more. In this topic, we refer to the simplified login only.

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 :
   - Simplified login URL: `https://login.eloqua.com/siteLogin?SiteName={CompanyName}&ReturnUrl=/apps/embed/salesTools/engage/compose`
   - To use the legacy URLs, see Legacy login URLs.
7. 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 Oracle Eloqua login URL you want to use. You can use the simplified login URL or a specific legacy URL based on the desired login method. Learn more.

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 the **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:
   - Simplified login URL: https://login.eloqua.com/siteLogin?SiteName={CompanyName}&ReturnUrl=/apps/embed/salesTools/engage/compose
   - To use the legacy URLs, see Legacy login URLs.

e. Customize the Engage URL with parameters that support the desired experience for your sales users. Learn more.

> **Tip**: To pass the email address of the lead to Engage, add the following parameter to the URL `emailAddress={!lead.email}`. For contact object, use `emailAddress={!contact.email}`.

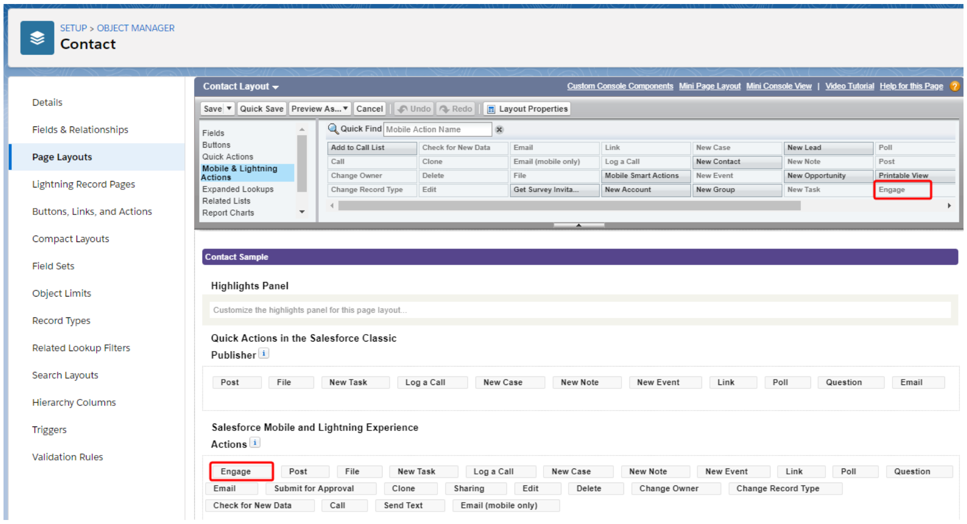
8. Save all the changes to your buttons and test by loading a Lead/Contact. On a Lead/Contact record, clicking these Engage buttons should give seamless access to Engage. Ensure you are logged into Salesforce from your dedicated Salesforce domain and not the standard login.salesforce.com.

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**.

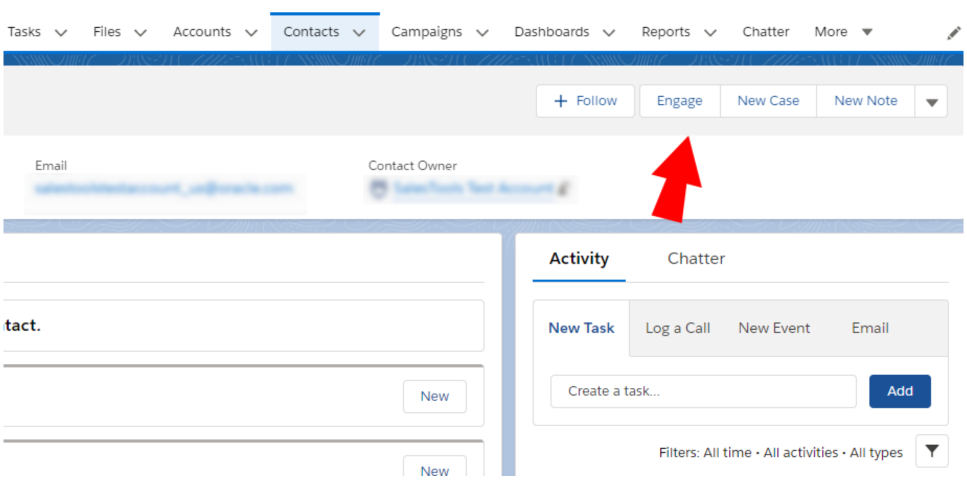
> **Note**: Use *Mobile & Lightning Actions* to locate your button. Do not use *Buttons*, which is intended for Salesforce Classic.

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

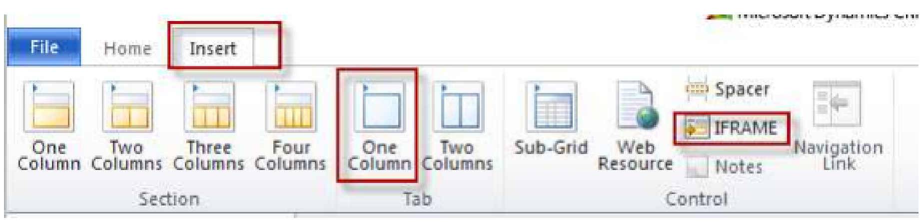
You can embed Engage in Microsoft Dynamics 2013.

Prerequisites:

- Build an allowlist of the domains that will be hosting embedded Engage pages. Learn more in the Configuring Engage topic.
- Determine the Oracle Eloqua login URL you want to use. You can use the simplified login URL or a specific legacy URL based on the desired login method. Learn more.

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
   b. *URL*: http://about:blank
   c. *Label*: Eloqua Engage
   d. Ensure that *Restrict cross-frame scripting* is unchecked
7. Select the *Formatting* tab. Modify the height by setting the number of rows (try 20).

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

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

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

11. Click the *Events* tab.

12. 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).

    - Simplified login URL

    ```
    var newUrl = "https://login.eloqua.com/siteLogin?SiteName=
    {CompanyName}&ReturnUrl=/apps/embed/salesTools/engage/compose
    Xrm.Page.ui.controls.get("IFRAME_Engage").setSrc(newUrl);
    ```

    - To use the legacy URLs, replace the `newURL` in the code above with the Legacy login URLs.

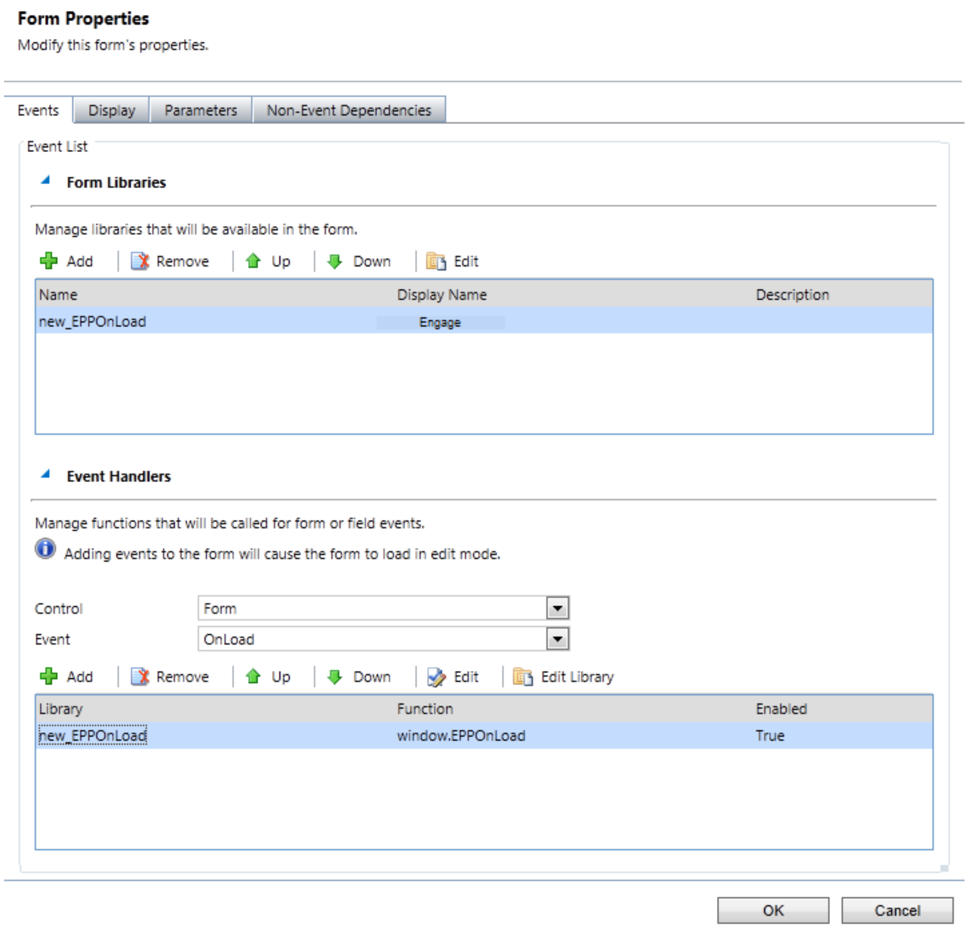
15. Customize the Engage URL with parameters that support the desired experience for your sales users. Learn more.

> **Tip**: To pass the email address of the contact or lead add the following parameter to the URL `emailAddress="+ document.getElementById("{emailaddress1}").title;`.

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

17. Click **OK**

18. Click **Save**



19. Click **Publish**.

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

Embedding Engage in Microsoft Dynamics 365

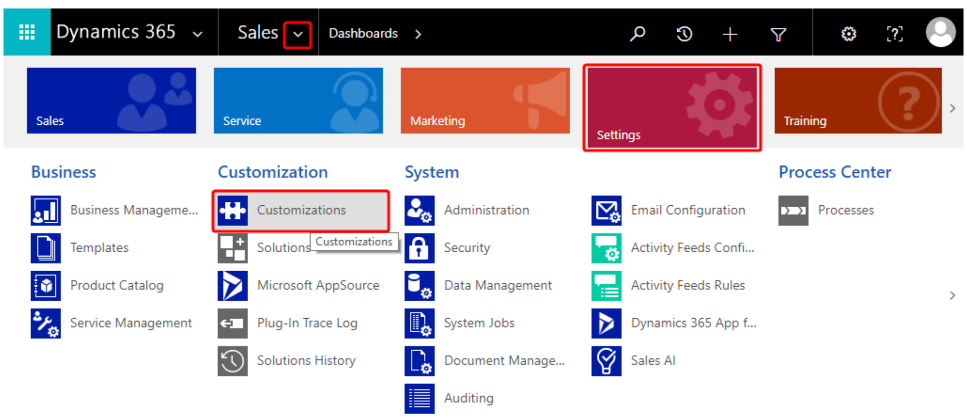
You can add Engage to your Microsoft Dynamics 365 instance.

Prerequisites

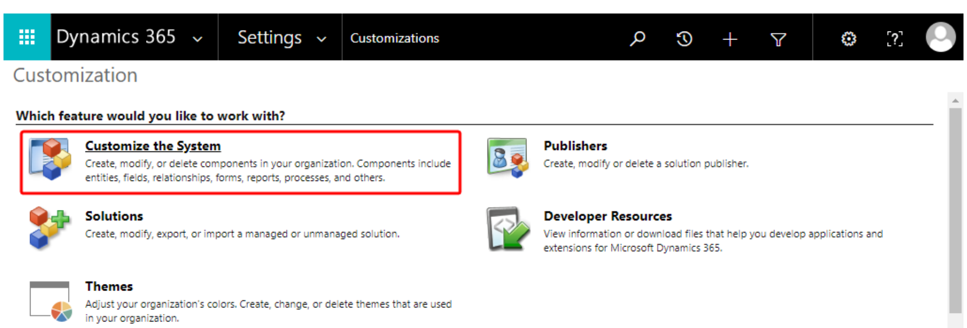
- A Microsoft Dynamics 365 instance and the permissions needed to customize it
- Build an allowlist of the domains that will be hosting embedded Engage pages. Learn more in the Configuring Engage topic.
- Determine the Oracle Eloqua login URL you want to use. You can use the simplified login URL or a specific legacy URL based on the desired login method. Learn more.

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**.

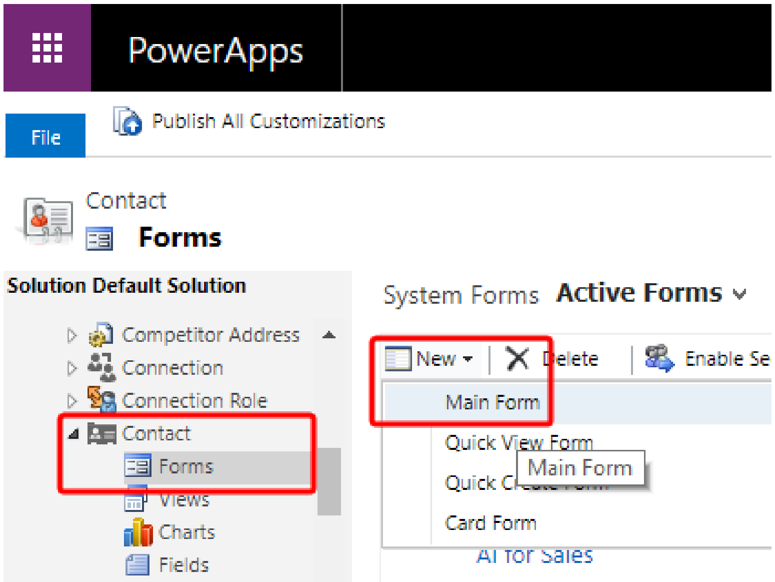


3. On the *Customization* page, click **Customize the System**.



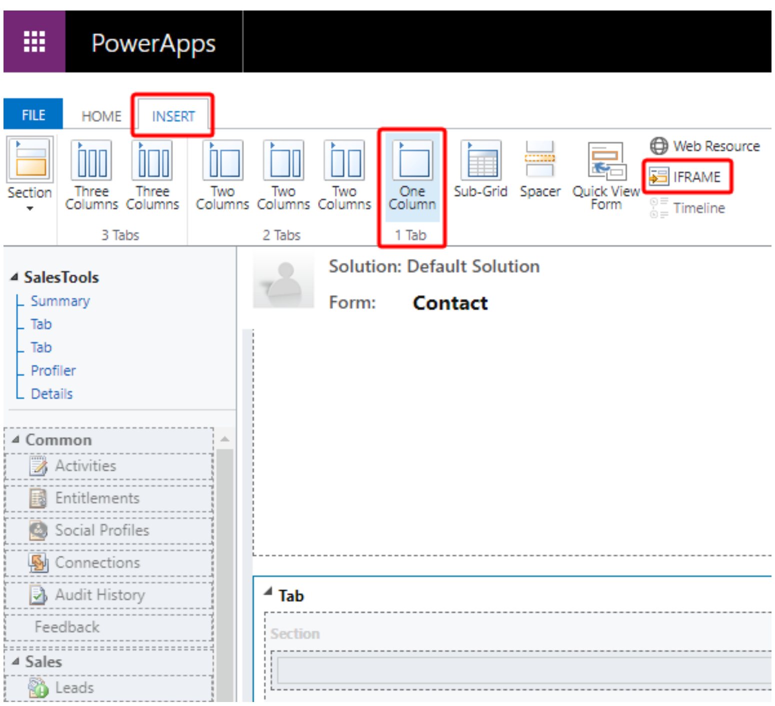
4. On the *PowerApps* page, under *Components*, select **Entities** > **Contact** > **Forms**.

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



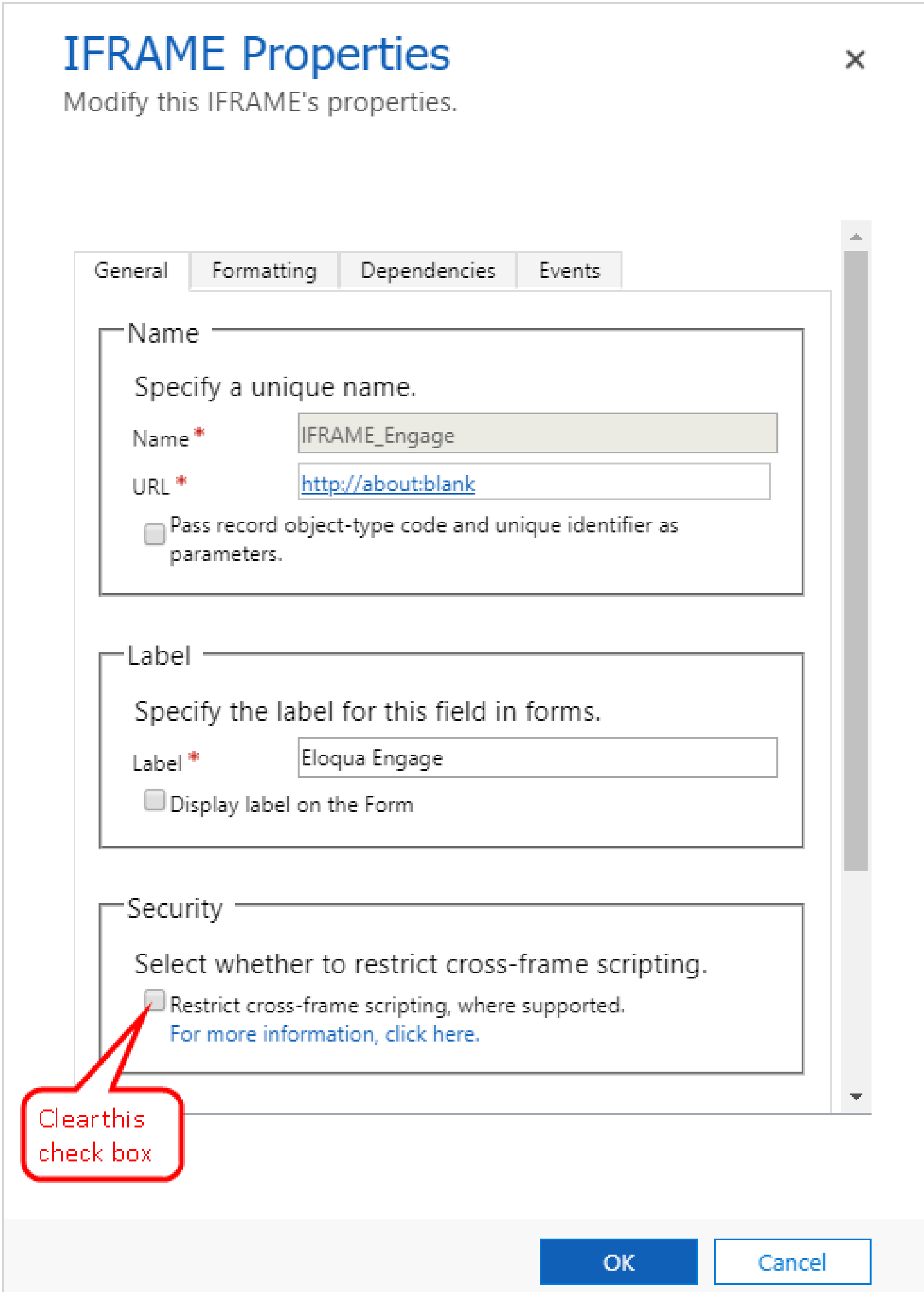
6. Click the **Insert** tab.

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.



a. *Name*: IFRAME_Engage

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

c. *Label*: Eloqua Engage

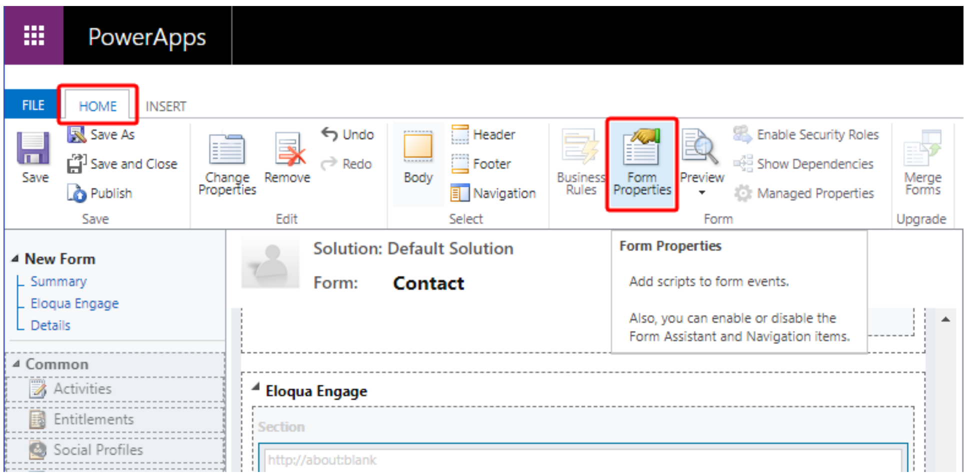
d. In the *Security* section, clear the **Restrict cross-frame scripting** option.

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**.

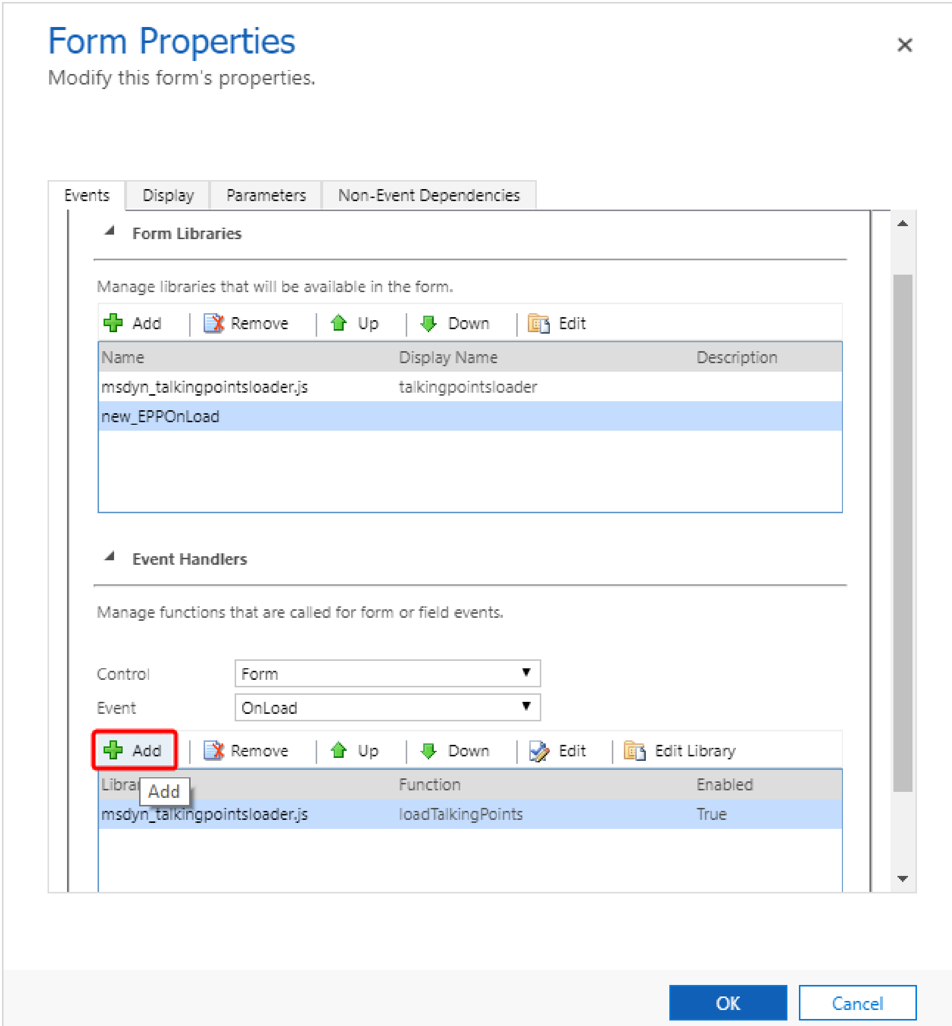


The *Events* tab of the *Form Properties* window is displayed.

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

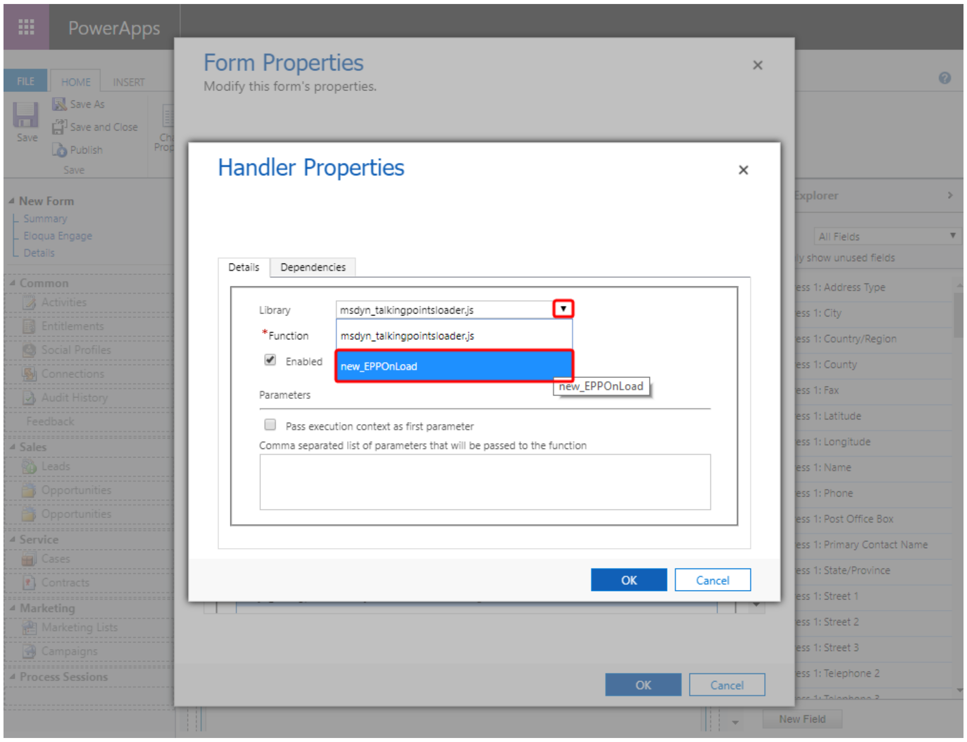
14. Select **new_EPPOnLoad** and click **Add**.

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:

   - Simplified login URL

```
function loadEngage() {
var newUrl = "https://login.eloqua.com/siteLogin?SiteName=
{CompanyName}&ReturnUrl=/apps/embed/salesTools/engage/compose
Xrm.Page.ui.controls.get("IFRAME_Engage").setSrc(newUrl);
```

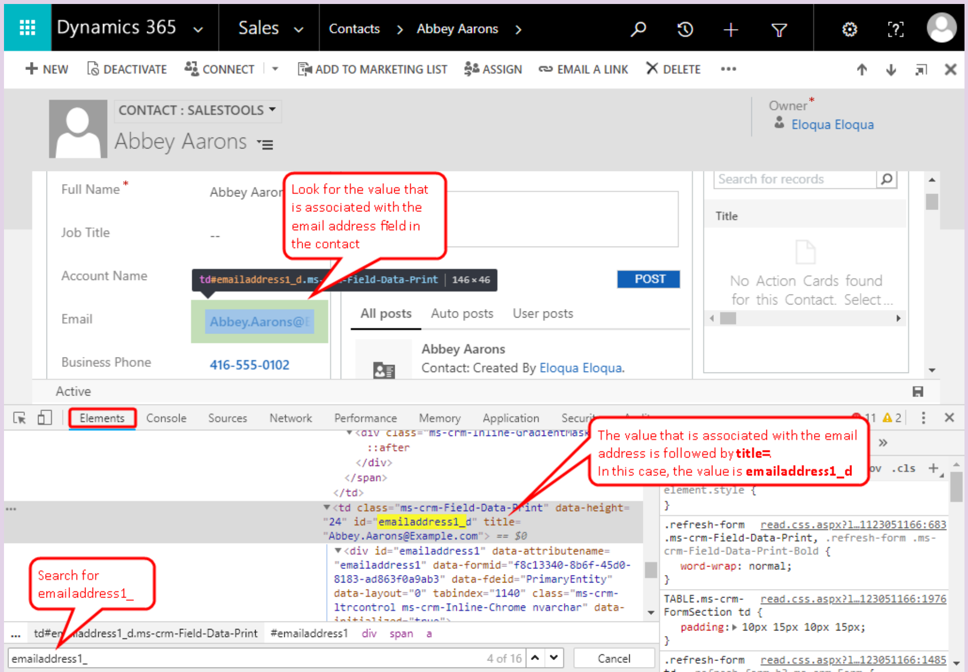
```
}
```

- To use the legacy URLs, replace the `newURL` in the code above with the Legacy login URLs.

21. Customize the Engage URL with parameters that support the desired experience for your sales users. Learn more.

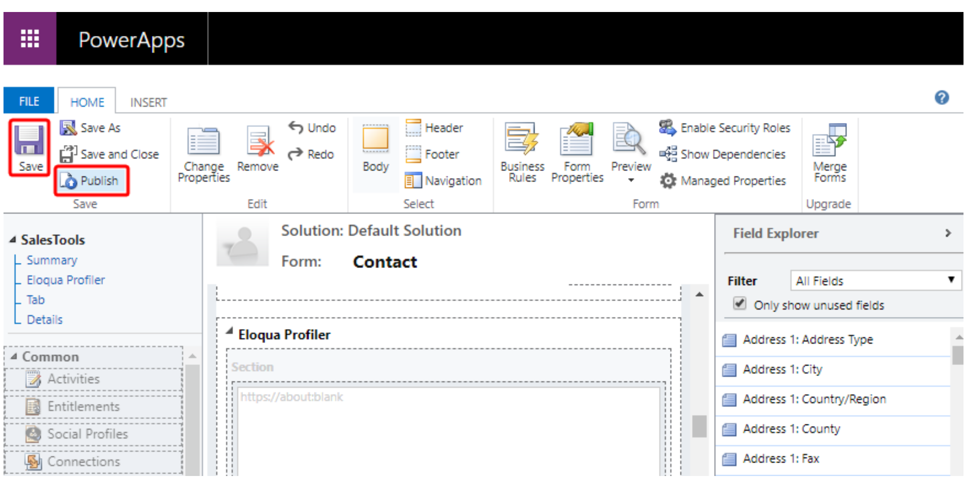
> **Tip**: To pass the email address of the contact or lead add the following parameter to the URL `emailAddress="+ document.getElementById("{emailaddress1}").title;` and replace `{`*emailaddress1*`}` with the value in your Microsoft Dynamics 365 instance. For example, it can be `emailaddress1`, `emailaddress1_d`, 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.
>
> c. On the *Elements tab*, press Ctrl+F and search for emailaddress1.
>
> 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.



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.

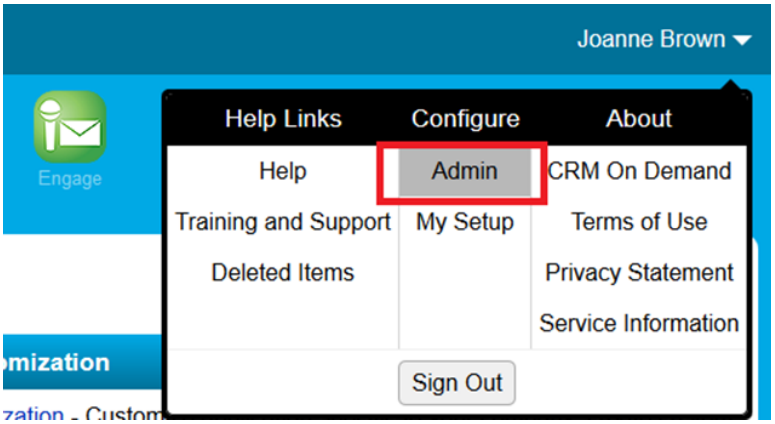
Step 1: Creating a web applet for contact and leads

Prerequisites:

- Build an allowlist of the domains that will be hosting embedded Engage pages. Learn more in the Configuring Engage topic.
- Determine the Oracle Eloqua login URL you want to use. You can use the simplified login URL or a specific legacy URL based on the desired login method. Learn more.

To create a web applet:

1. Login to CRM onDemand with your Administrator credentials.
2. Navigate to **User** > **Configure** > **Admin**.



3. Click **Application Customization**.

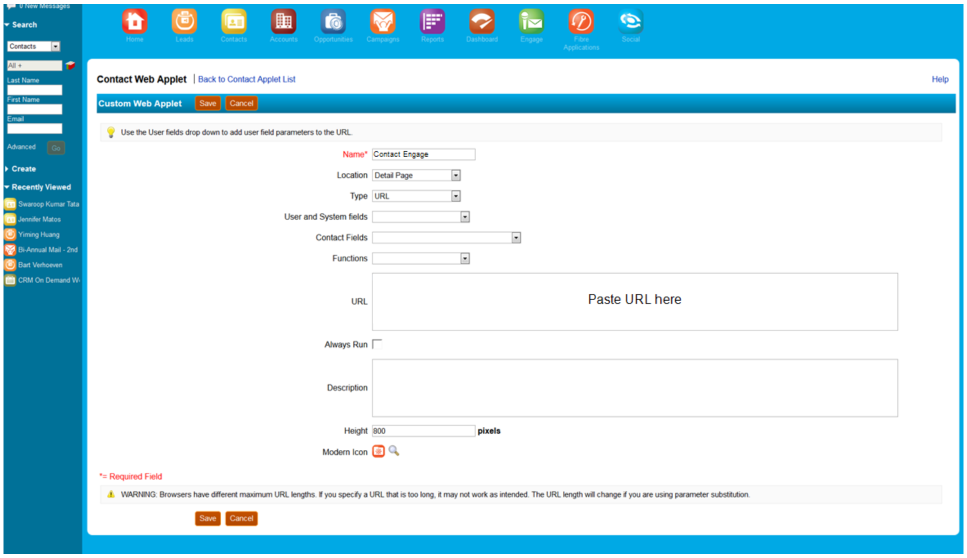
4. Under *Record Type Setup*, click **Contact**.

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
     - Simplified login URL: hthttps://login.eloqua.com/siteLogin?SiteName={CompanyName}&ReturnUrl=/apps/embed/salesTools/engage/compose
     - To use the legacy URLs, see Legacy login URLs
     - Customize the Engage URL with parameters that support the desired experience for your sales users. Learn more.

     > **Tip**: To pass the email address of the contact or lead, use `https://login.eloqua.com/siteLogin?SiteName={CompanyName}&Url=/apps/embed/salesTools/engage?compose&emailAddress%3D%%Email_Address%%`.

   - **Height**: Enter *800*



6. Click **Save**.

Step 2: Adding webs applet to page layouts

To add an applet to a page layout

1. Navigate to **User** > **Configure** > **Admin**.
2. Click **Application Customization**.
3. Under *Page Layout Management*, click **Contact Page Layout**.
4. Choose the page layout that you want to modify
5. It is not necessary to configure Steps 2 or 3. Click Step 4 (Related Information) to continue.
6. 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.
7. Select the applet in the *Available Information* column, then click the **>** arrow to move it to the *Displayed Information* column.
8. Click **Finish**.

Important: Repeat the above steps for Leads

Embedding Engage in Okta with SSO

Learn how to access Engage if you are using Okta SSO.

Overview

The high-level configuration steps are as follows:

1. Setup Okta as an identity provider in Oracle Eloqua
2. If you are going to embed Engage pages in other apps, create the allowlist of domains that will host Engage pages.
3. Understand how to access Profiler:
   - Accessing Engage with Okta SSO
   - Accessing Engage as an Okta app

Accessing Engage with Okta 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 embedded inside a CRM system.

Before you begin:

- Setup Okta as an identity provider in Oracle Eloqua

To access Engage Okta SSO:

1. Enter the following URL:
   - To launch Engage standalone in a browser using the simplified login URL: `https://login.eloqua.com/siteLogin?SiteName={CompanyName}&ReturnUrl=/apps/embed/salesTools/engage/compose`
   - To embed Engage in a CRM or other app using the simplified login URL: `https://login.eloqua.com/siteLogin?SiteName={CompanyName}&ReturnUrl=/apps/embed/salesTools/engage/compose`
   - To use the legacy URLs, see Legacy login URLs.

Once you have this properly formatted URL, as long as a user has an Okta session active in their browser, they can access Engage.

Accessing Engage as an Okta app

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

1. In Okta, create a new Okta app for Eloqua Engage.
2. While creating the SAML2 template, add the following to the **Default Relay State** field:

   `ReturnURL=%2Fapps%2FsalesTools%2Fengage`

   > **Tip**: You can append additional parameters to this URL. For example, to open the Engage compose page. Learn more.

