



# Oracle Eloqua Sales Tools for Microsoft Outlook

User Guide

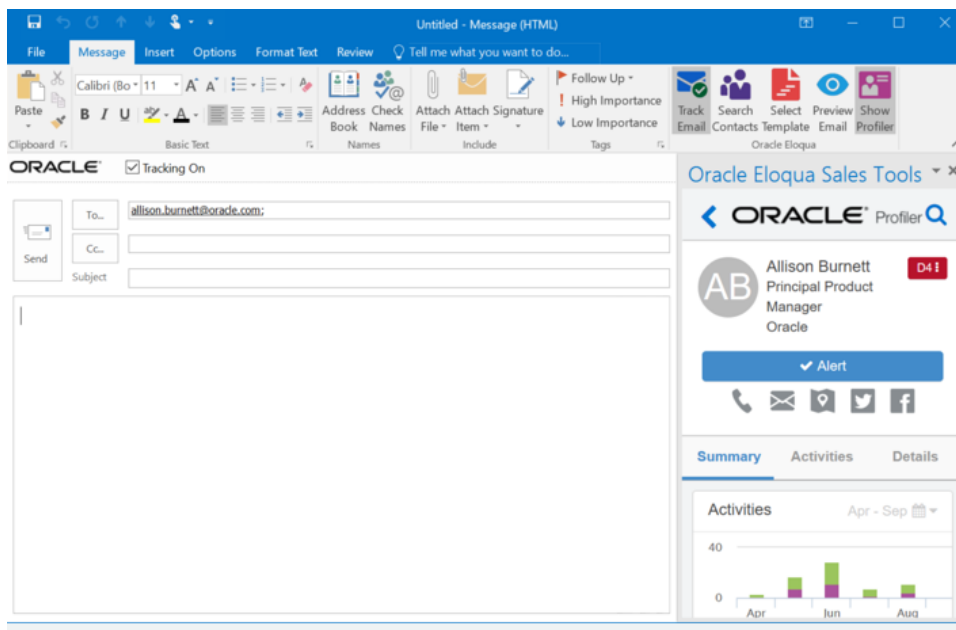
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# Oracle Eloqua Sales Tools for Microsoft Outlook

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



Oracle Eloqua Sales Tools for Microsoft Outlook is provided free of charge as an add-in to all Engage customers. The use of Profiler is supported but optional for customers with both Engage and Profiler licenses. Emails are sent through Microsoft Outlook, and are created and visualized in Engage for sales users to review and track. An email activity is created for each recipient.

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

### Oracle Eloqua Profiler

**Analyze Digital Body Language** by drilling into cross-channel buyer activities including email open/clicks, form submission, web activity and more.

**Browse Lead Scores** to identify the right opportunity to chase for your buyers and prospects.

**Set-up Web Alerts** and get notified once a key prospects visits your website

### Oracle Eloqua Engage

**Engage with Insight** leveraging pre-approved marketing templates or personal emails without having to leave the Outlook email composer.

**Track Every Interaction** by enabling tracking on Outlook Emails, whether you're using a marketing template or writing a more personal email.

**Leverage Marketing Approved Content** by having access to email templates straight within Microsoft Outlook.

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

# Frequently asked questions

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

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

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

**Q. How do I install the Oracle Eloqua Sales Tools for Microsoft Outlook?**

**A.** Engage users can [install the add-in on their own](#). IT administrators can also install the add-in for users in bulk. For information on mass deployment, contact [My Oracle Support](#).

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

**A.** Sales users require, at a minimum, the Oracle Eloqua Engage and the Eloqua Sales Tools for Microsoft Outlook licenses. To access Profiler from the Microsoft Outlook add-in, sales users will also need the Profiler license.

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

**A.** Emails are sent through the customer's Exchange server. The add-in calls Eloqua to create a deployment and provide the email content, that is then sent by the customer's exchange sever. Emails are visualized in Engage for sales users to review and track. An email activity is created for each recipient.

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

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

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

**Q. When I open Microsoft Outlook, a dialog message appears about using the "Send Pictures With Document" setting. What does this mean?**

A Microsoft Outlook setting can be used to embed images in a message. This setting may be on or off depending on your version of Microsoft Outlook and could be turned on or off by you or your organization.

This setting may prevent adding the Oracle Eloqua tracking pixel when you send a tracked email message.

You can continue to use the Microsoft Outlook add-in with this setting turned on. But we recommend testing to ensure that tracking is not impacted by your particular Microsoft Outlook version and configuration. If you want to turn off the setting, [refer to this support article from Microsoft](#).

**Q. Is there a maximum number of recipients?**

**A.** Yes, the maximum number of recipients that can be tracked is 100. Administrators cannot manage this maximum for the Microsoft Outlook add-in.

**Q. Is the hide in mobile feature supported in Sales Tools for Microsoft Outlook?**

**A.** No. If a template is created in Eloqua that includes a [hidden content](#), and a user sends the template via Sales Tools for Microsoft Outlook, then that email does not hide the content.

**Q. Are locked blocks supported in Sales Tools for Microsoft Outlook?**

**A.** Locked blocks are not supported in the Oracle Eloqua Sales Tools for the Microsoft Outlook add-in. In the Microsoft Outlook add-in, sales users will be able to edit the locked block styling.

**Q. Is Microsoft Office 365 supported?**

**A.** Microsoft Office 365 Professional Plus (ProPlus) is supported. This version of Office 365 still allows users to install the most recent version of Microsoft Outlook on their local machines. View the [Microsoft documentation](#) for more information. Web-based versions of Outlook that are a part of Office 365 are not supported.

**Q. I see that you support Microsoft Office 365 for Exchange Server, does this mean you support Office 365?**

**A.** The Office 365 version of Exchange Server can be used to connect with Outlook 2019 and is therefore supported. The only version of the Office 365 product line that is supported is Office 365 ProPlus.

**Q. If emails are sent using my Exchange Server, how would bouncebacks be tracked?**

**A.** If a sales user sends an email to a contact using the add-in in Outlook, and that email bounces, that bounceback is *not* currently tracked back to Eloqua.

Emails sent using Engage, which are sent through Eloqua, will track bouncebacks. This is an important consideration when evaluating which application to use.

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

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

**Q. Is the add-in localized?**

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

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

**A.** Users are limited to 100 tracked emails that can be sent at one time. Additionally, if you configure the send limit in the Engage app, you can also limit the number of sales emails that your reps can send to the same contact over a period of time.

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

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

**Q. Is sign on with SSO supported?**

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

**Q.** How can I avoid email opens when I view a sent message in Outlook?

**A.** The sent message includes a tracking pixel. Once the message is in the *Sent* folder, Sales Tools for Microsoft Outlook removes its tracking pixel to avoid any artificial inflation of metrics due to opening a message in your *Sent* folder. However, Microsoft Outlook caches the first message in the *Sent* folder for approximately five minutes or until you perform another action in Outlook such as opening a new *Compose* window.

# Installing Oracle Eloqua Sales Tools for Microsoft Outlook

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

**Important:** Engage end users can install the add-in on their own. IT administrators can also install the add-in for users in bulk. For information on mass deployment, contact [My Oracle Support](#).

## Prerequisites

- You must have the Eloqua Engage and the Eloqua Sales Tools for Microsoft Outlook licenses. To access Profiler from the Microsoft Outlook add-in, you must also have the Profiler license.
- Prior to installing Oracle Eloqua Sales Tools for Microsoft Outlook, ensure that your system meets the following requirements:

Microsoft Outlook	<ul style="list-style-type: none"><li>• Microsoft Outlook 2016</li><li>• Microsoft Outlook 2019</li><li>• Microsoft Outlook 2021</li><li>• Microsoft Outlook for Microsoft 365</li></ul>
Operating system	<ul style="list-style-type: none"><li>• Microsoft Windows 10</li><li>• Microsoft Windows 11</li></ul>

Microsoft Exchange Server	<ul style="list-style-type: none"> <li>• Microsoft Exchange Server 2016</li> <li>• Microsoft Exchange Server 2019</li> <li>• Microsoft Office 365</li> </ul>
Mailbox storage	<ul style="list-style-type: none"> <li>• OST in Cached Exchange Mode (default mode)</li> <li>• PST</li> </ul>
Microsoft .NET Framework	v4.8+ must be installed on the computer where the add-in will be used. 4.8 is installed by default with Windows 10.
Default application (Optional)	Users can open a compose window in Microsoft Outlook when clicking on a contact's email address within Profiler. In order for a compose window to open in Microsoft Outlook, users must configure Microsoft Outlook to be the default email application on their machine.

You can search for and install new apps in the Oracle Cloud Marketplace ([https://cloudmarketplace.oracle.com/marketplace/en\\_US/homePage.jspx](https://cloudmarketplace.oracle.com/marketplace/en_US/homePage.jspx)).

### To install Oracle Eloqua Sales Tools for Microsoft Outlook:

1. Ensure Microsoft Outlook is not currently running on your machine. If it is open, you will be prompted to close it before installing the add-in.
2. Follow one of the URLs below, depending on your Windows operating system:

Windows 32-bit:

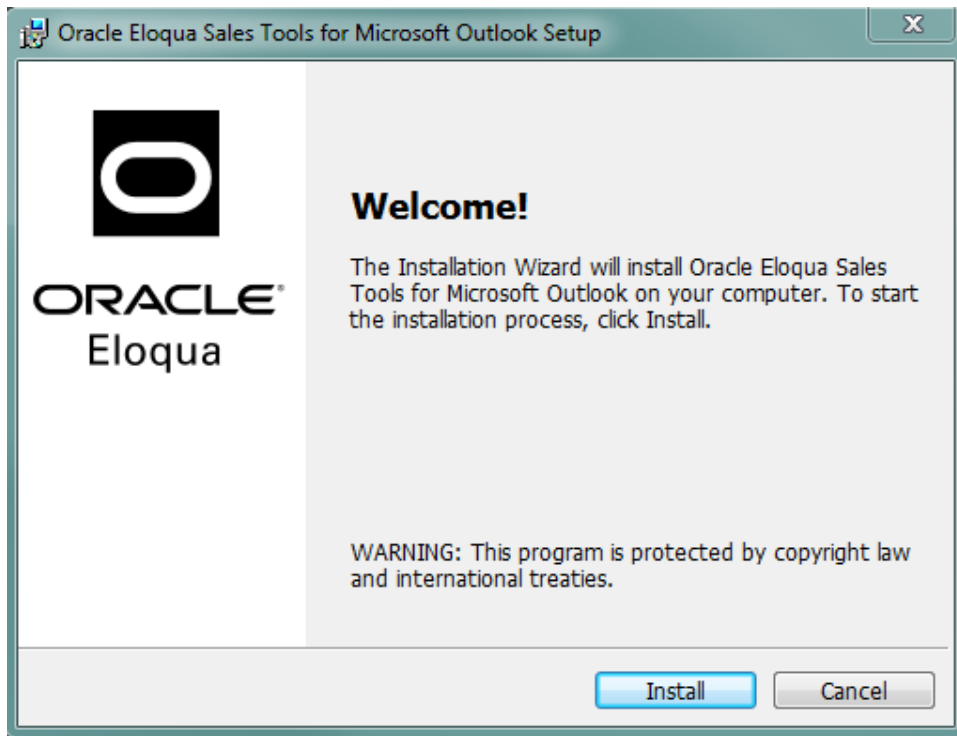
<https://cloudmarketplace.oracle.com/marketplace/app/SalesToolsMicrosoftOutlookWin32>

Windows 64-bit:

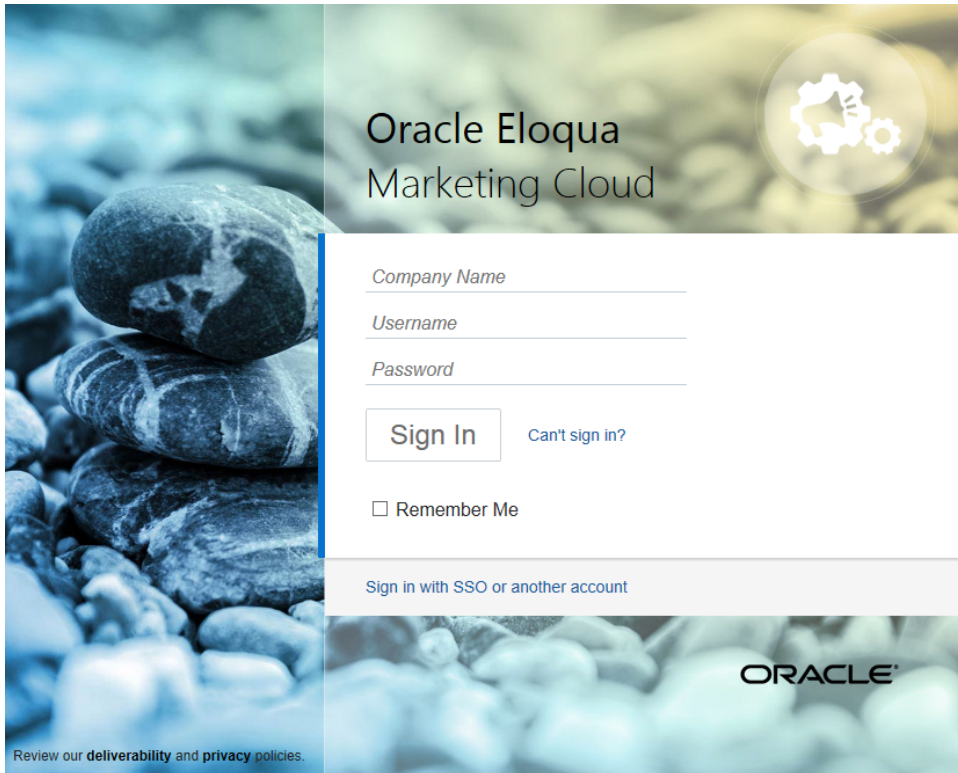
<https://cloudmarketplace.oracle.com/marketplace/app/SalesToolsMicrosoftOutlookWin64>

3. Click **Get App**.

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



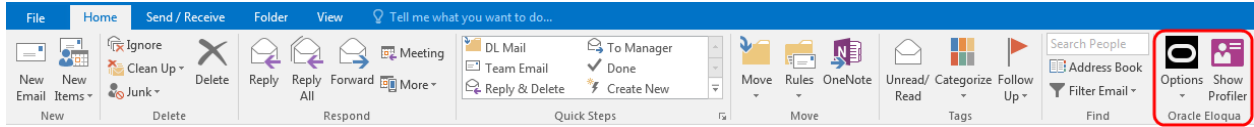
5. Open Microsoft Outlook.
6. Sign in to Oracle Eloqua using your company name and credentials. If your company leverages single sign-on, click **Sign in with SSO or another account**. For more details, see [Signing in to Eloqua](#).



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

**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](#).

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



# Accessing Oracle Eloqua Sales Tools for Microsoft Outlook

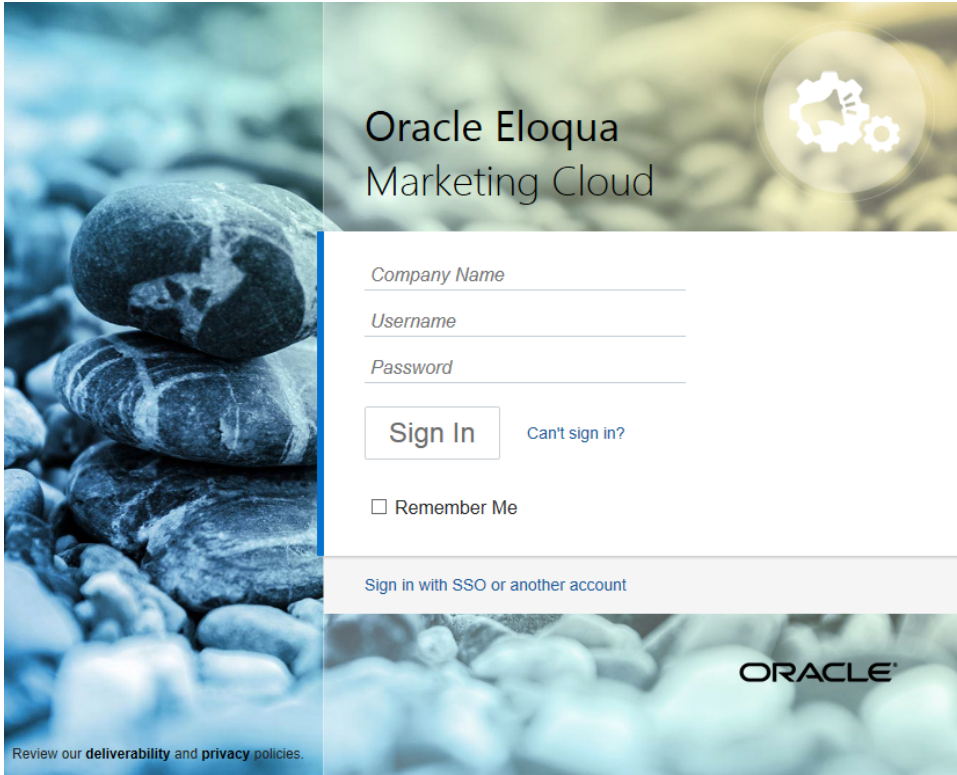
This topic outlines how to access the Oracle Eloqua Sales Tools for Microsoft Outlook add-in once it has been installed.

## Prerequisites

- Oracle Eloqua Sales Tools for Microsoft Outlook must be [installed](#).
- You must have the Eloqua Engage and the Eloqua Sales Tools for Microsoft Outlook licenses. To access Profiler from the Microsoft Outlook add-in, you must also have the Profiler license.

## To access Oracle Eloqua Sales Tools for Microsoft Outlook:

1. Open Microsoft Outlook.
2. Click **Options** > **Sign In** from the main ribbon, or open an email and click **Sign In**.
3. Sign in to Oracle Eloqua using your company name and credentials. If your company leverages Single Sign-On, click **Sign in with SSO or another account**.



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

# Sending a tracked email

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

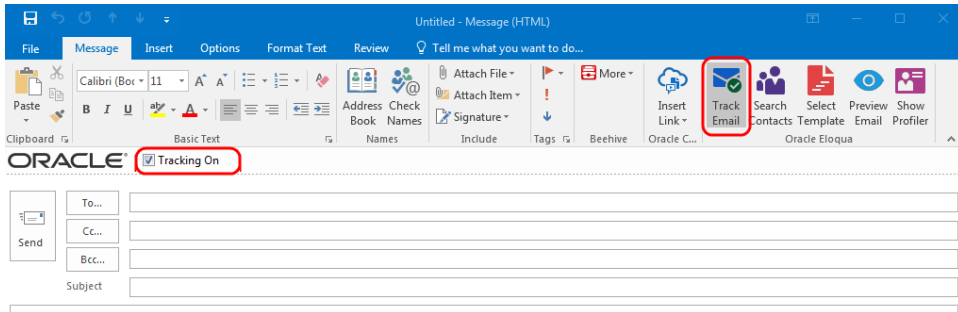
## Prerequisites

- Oracle Eloqua Sales Tools for Microsoft Outlook must be [installed](#).
- You must have the Eloqua Engage and the Eloqua Sales Tools for Microsoft Outlook licenses. To access Profiler from the Microsoft Outlook add-in, you must also have the Profiler license.

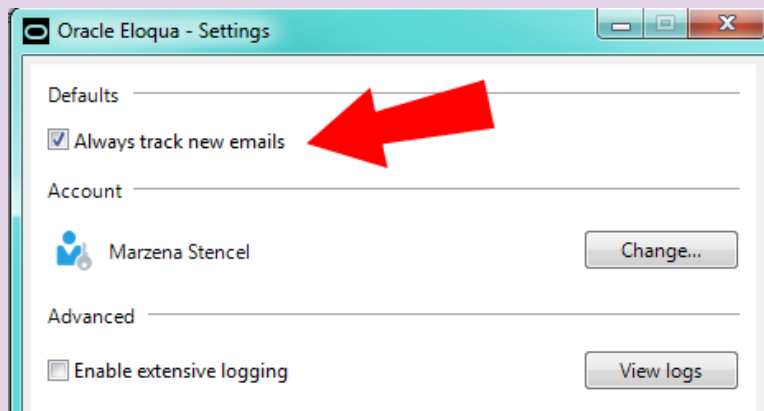
**Note:** Tracking is enabled by default when the add-in is installed. Your organization may desire tracking on all new emails to be off by default. For example, you may want a sales representative to deliberately choose to track specific emails and require them to check the tracking box. You can configure whether this option is enabled by default or not via a Microsoft Windows Group Policy or Microsoft System Center Configuration Manager (SCCM) deployment. For more details, log in to [My Oracle Support](https://support.oracle.com) (<https://support.oracle.com>) and create a service request.

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

1. Open a new email in Microsoft Outlook. When tracking is enabled, the **Tracking On** box is checked and **Track Email** option in the ribbon is selected. Users can toggle tracking on or off for individual email messages. When the **Tracking On** box is cleared, the message is sent as a personal email and is not tracked.

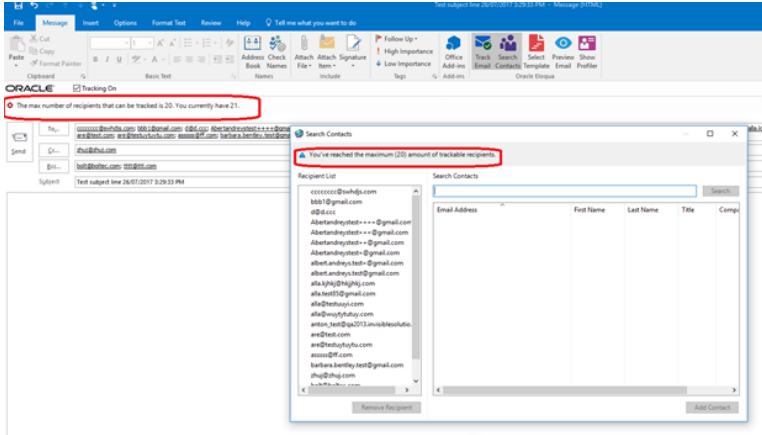


**Tip:** To automatically enable tracking for all new emails, in the main ribbon, navigate to **Options > Settings** and check **Always track new emails**.

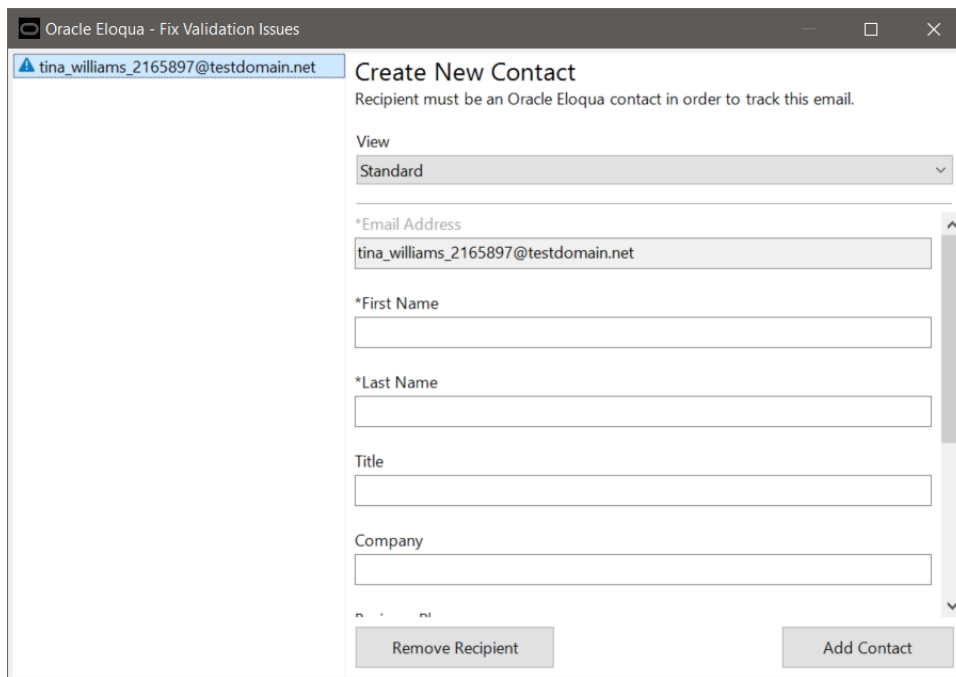


2. Add your recipients by manually entering email addresses or searching Oracle Eloqua contacts.

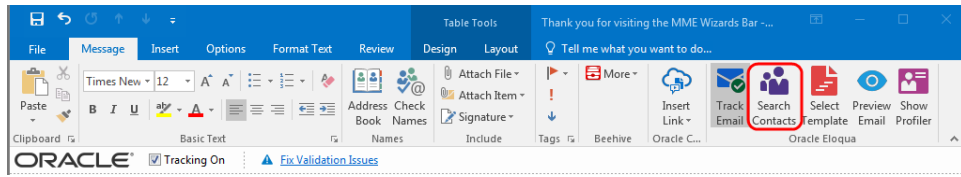
**Important:** The maximum number of recipients that can be tracked is 100.



- The add-in automatically verifies if manually entered recipients are Oracle Eloqua contacts. If they are not contacts, a *Fix Validation Issues* link is displayed. Click the link to add them as contacts before sending the email. You can also remove the recipients if you do not want to add them as contacts.



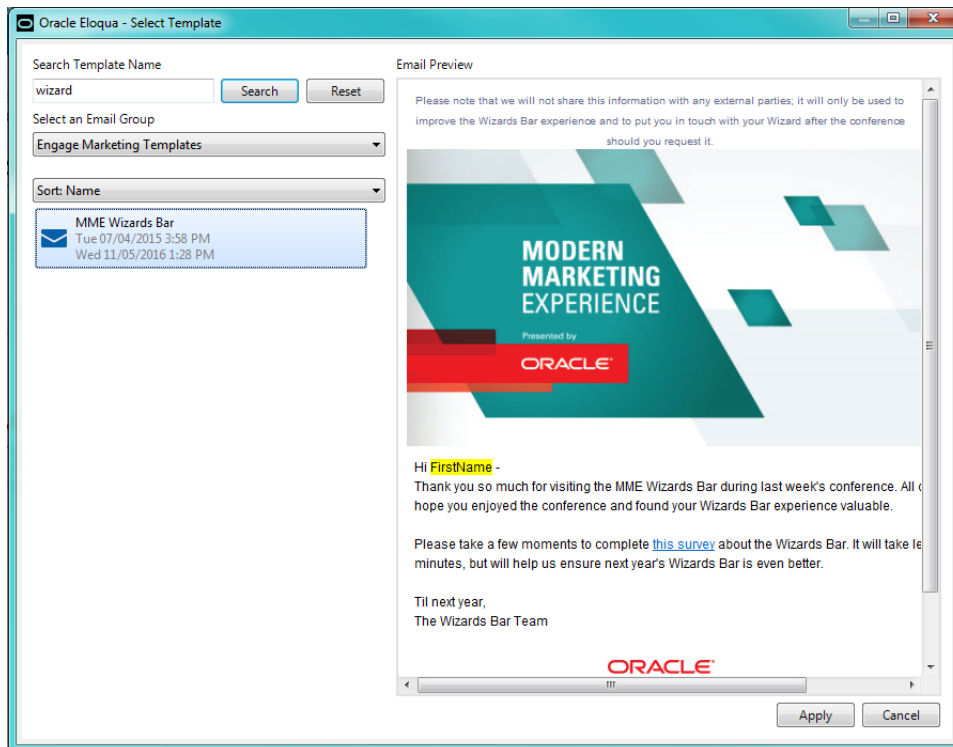
- To search for Oracle Eloqua contacts, click **Search Contacts** in the ribbon.



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

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

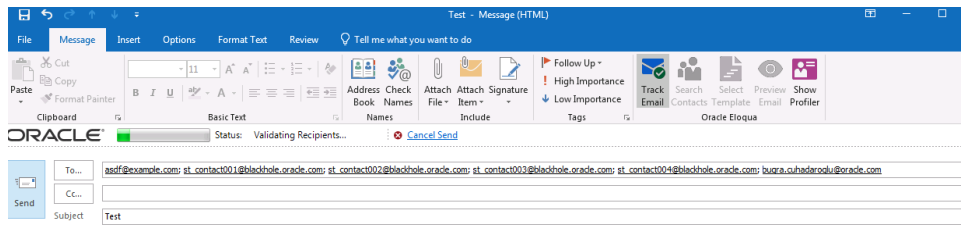
3. Write a personal email or select an Oracle Eloqua template.
  - To select a template, click **Select Template** in the email ribbon. You can search templates by its name. At least three characters must be specified to search. Narrow the search by selecting specific email groups. Sort templates by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



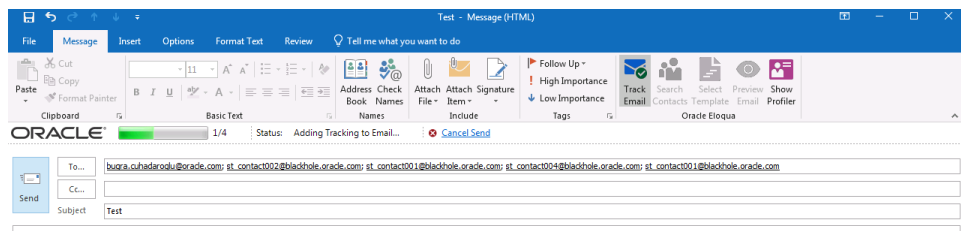
- Templates with cloud content cannot be used but they are still searchable. The **Apply** button will be disabled when these templates are selected.
  - Microsoft Outlook does not support locked regions within an email. Once you select a template, all sections will be editable.
  - After a template is selected, the contacts are validated to check if they have the required field merges. If not, you will be prompted to add the missing field merges before sending the email.
  - You cannot use any files (pictures, documents, and so on) as Microsoft Outlook email attachments because they are not accessible from the add-in. However, you can add attachments to the email from your machine. These attachments are not tracked.
4. Click **Preview Email**. The preview allows you to take a peek at how the email will look like for the first recipient in the list, including any field merges. In order to preview the email, the first

recipient must be validated and the subject cannot be empty. Close the preview and make any necessary edits.

5. Click **Send**. Oracle Eloqua Sales Tools for Microsoft Outlook validates recipients to check for any problems and will prompt you to fix any issues that are found.



6. After validation is complete, tracking parameters are added to the email. Click the **Cancel Sending** link if you want to stop the email from being sent during this process. As an email is sent to each contact, they are removed from the *To* line.



Your email is sent to your recipients and appears in your Microsoft Outlook *Sent Items* folder. It is automatically assigned a *Tracked by Eloqua* category. Email sent metrics are also displayed. Learn about [sent email metrics](#).

**Important:** The sent message includes a tracking pixel. Once the message is in the *Sent* folder, Sales Tools for Microsoft Outlook removes its tracking pixel to avoid any artificial inflation of metrics due to opening a message in your *Sent* folder. However, Microsoft Outlook caches the first message in the *Sent* folder for approximately five minutes or until you perform another action in Outlook such as opening a new *Compose* window.

# Creating new contacts using the Eloqua Sales Tools add-in for Microsoft Outlook

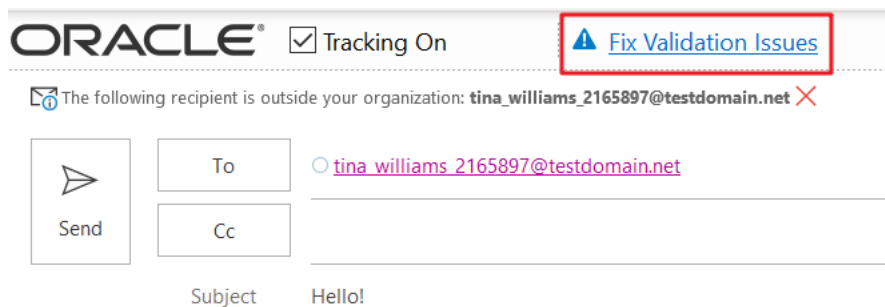
As a sales user, you can use Oracle Eloqua Sales Tools for Microsoft Outlook to create new Eloqua contacts for your leads.

## Prerequisites

- Oracle Eloqua Sales Tools for Microsoft Outlook must be [installed](#).
- You will need permission to manage contacts, which an administrator needs to enable for you. An administrator is an Eloqua user who manages users and security groups.

## To create a contact using Oracle Eloqua Sales Tools for Microsoft Outlook:

1. Open a new email in Microsoft Outlook, make sure the **Tracking On** box is checked, and type your new contact's email address. You will see a *Fix Validation Issues* warning appear above the *To:* field.



2. Click the *Fix Validation Issues* warning to open the **Create New Contact** window. This will allow you to input additional contact details. The field selection is based on your selection in the **View** drop-down menu.

**Note:** You can use the **View** drop-down menu to change the selection of contact fields available to you. Your selection will depend on what views your administrator sets up. Administrators create and share contact views with sales rep using [existing Eloqua contact view management and access settings](#).

The screenshot shows a web browser window titled "Oracle Eloqua - Fix Validation Issues". The browser's address bar shows "tina\_williams\_2165897@testdomain.net". The main content area is titled "Create New Contact" and includes a sub-header "Recipient must be an Oracle Eloqua contact in order to track this email." Below this is a "View" dropdown menu, which is highlighted with a red rectangular box and currently displays "Standard". Underneath the dropdown are several input fields: "\*Email Address" (containing "tina\_williams\_2165897@testdomain.net"), "\*First Name", "\*Last Name", "Title", and "Company". At the bottom of the form are two buttons: "Remove Recipient" on the left and "Add Contact" on the right.

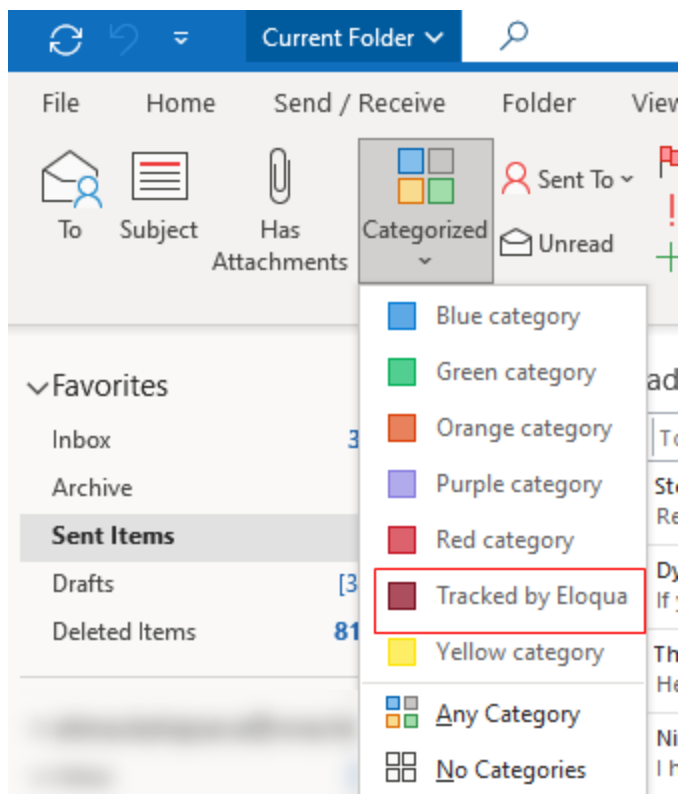
3. Click **Add Contact** when finished. Your tracked email to your new Eloqua contact is ready to be sent!

# Viewing email performance using Microsoft Outlook

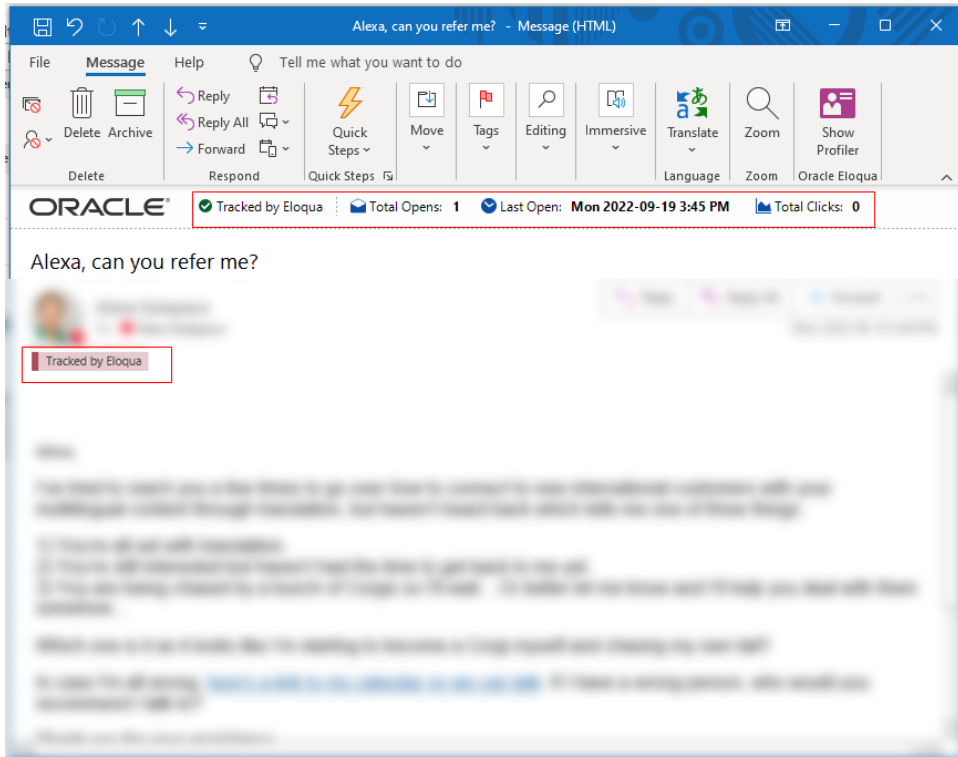
Once a tracked email is sent using Oracle Eloqua Sales Tools for Microsoft Outlook, email metrics, such as opens and clicks, are collected. The metrics are available when viewing the email in the Microsoft Outlook Sent Items folder. These metrics are also available in Engage, and in Insight for marketing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

## To view sent email performance:

1. In Microsoft Outlook, open your sent email folder.
2. Search for the tracked email that you sent. Tracked emails have their own category.



3. Open the email. The performance metrics are displayed in the message banner.



## Report metrics

This report captures the following metrics.

Metric	Description
Total Opens	<p>The number of times an email was opened. This includes multiple opens by the original recipient or forwarded recipient.</p> <p>Oracle Eloqua counts an email as opened if the recipient loaded the tracking pixel image contained in the email or clicked a link in the email. For more information, see <a href="#">Calculating email opens</a>.</p>
Last Open	The most recent date and time the email was opened.
Total Clicks	The total clickthroughs. This includes multiple clicks by the same recipient. System Action links are not tracked.

When reviewing metrics, note the following:

- Open statistics are only captured if the email recipient has the *display images* setting enabled for the email.
- When the email is forwarded or replied to, and the subsequent email is opened, the opens count towards the total opens.
- The *enable tracking* feature does not impact the behavior of Microsoft Outlook.

# Validation issues

Validating recipients involves checking all email recipients against the Oracle Eloqua contact database.

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

- When a recipient is manually added to the recipient list
- When the contact lookup dialog is closed
- When an email is previewed
- When an email is sent

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

- Are the recipients Oracle Eloqua contacts? To fix the issue, add recipients as contacts.
- Is all the information required for field merges in the selected template complete? To fix the issue, add the missing contact information required for the field merges in the template.
- Can the email be sent to all contacts? For example, are contacts subscribed and do they have valid email addresses? To fix the issue, remove any contacts who are excluded.

A green check mark displays after all validation issues have been resolved and the tracked email can be sent.

After clicking send, additional validation occurs to ensure that send limits haven't been exceeded. If they have, you will have to remove the contact.

# Accessing Profiler

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

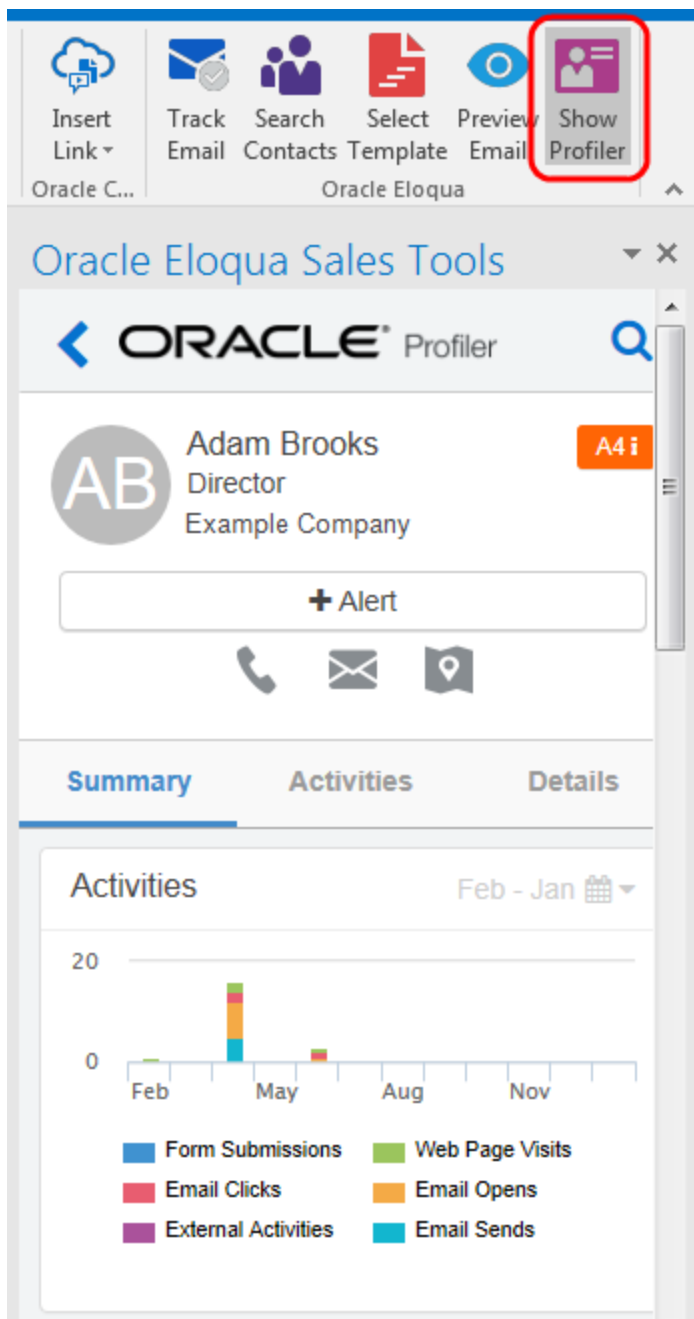
## Prerequisites

- Oracle Eloqua Sales Tools for Microsoft Outlook must be [installed](#).
- You must have the Eloqua Engage and the Eloqua Sales Tools for Microsoft Outlook licenses. To access Profiler from the Microsoft Outlook add-in, you must also have the Profiler license.

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

1. Open Microsoft Outlook.
2. Open or select a message with the contact you want to view in Profiler.

3. From the Oracle Eloqua ribbon, click **Show Profiler**.



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