Oracle Fusion Cloud Sales Automation

How do I implement email features in Oracle Sales in the Redwood User Experience?

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1 How do I implement email features in Oracle Sales in the Redwood User Experience?

Email Integration Options for Oracle Sales in the Redwood User Experience

Your organization has several options for setting up email for Oracle Sales in the Redwood User Experience. The option your implementation team chooses affects the way you send and receive emails. Three of options involve integration with Microsoft Exchange.

No matter which one of these options you use, you must always initiate your email conversation from within Oracle Sales. To compose the initial email, click an email address or enter "send email" in the Action Bar. Oracle Sales inserts a code in your draft email. The code, which is invisible to recipients, lets the application track the email thread.

These sections give you an overview of the different email options:

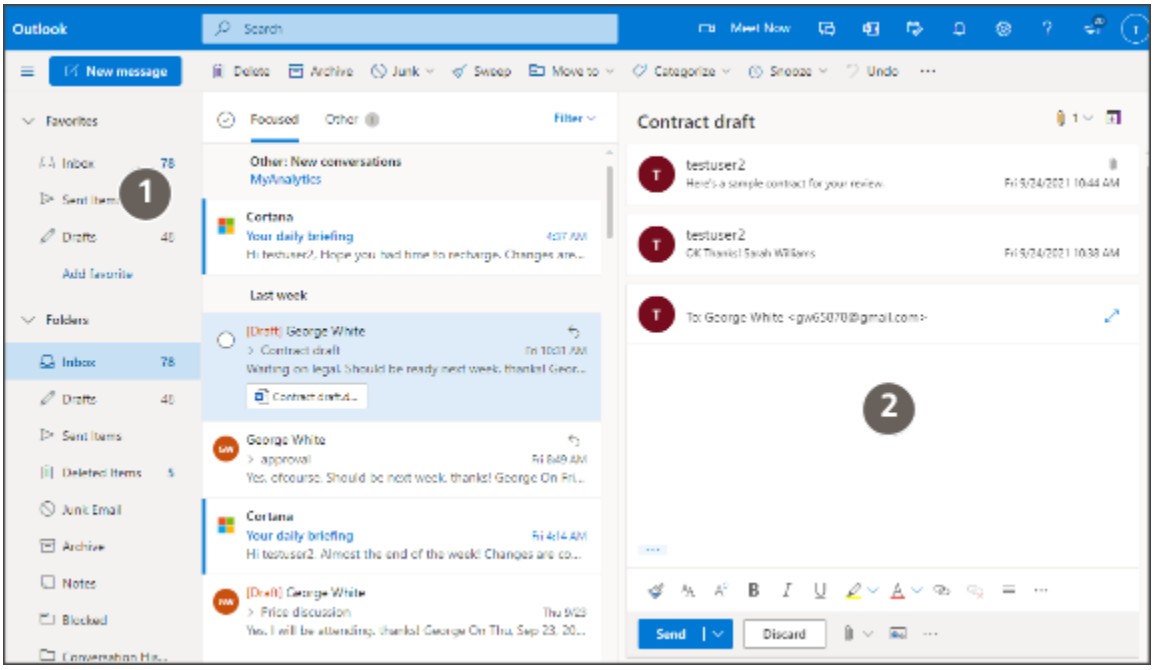
- *Microsoft Office 365*
- *Microsoft Outlook or Another Client Application Integrated with Microsoft Exchange*
- *Oracle Sales UI with Microsoft Exchange*
- *Oracle Sales UI with Oracle Email*

The last section, *Overview of Email Setup*, gives you an overview of the setups required for Microsoft Exchange and Oracle Email, along with links to the setup steps for each option.

Microsoft Office 365

You compose your email in your regular Microsoft Office 365 Outlook compose window. As long as you start the email conversation from within Sales, the complete email conversation gets recorded in the record where you started it and is also visible in Outlook. You can view and reply to emails in either application, and you get the benefit of all the Office 365 features: your drafts get saved as soon as you start typing, for example, and you can use your usual signature.

Here's a screenshot of an email thread with a contact that you can view and respond to interchangeably in Sales and in Office 365. Your drafts and sent emails get saved as usual (callout 1) and you get the same options when composing your email (callout 2):



Microsoft Outlook or Another Client Application Integrated with Microsoft Exchange

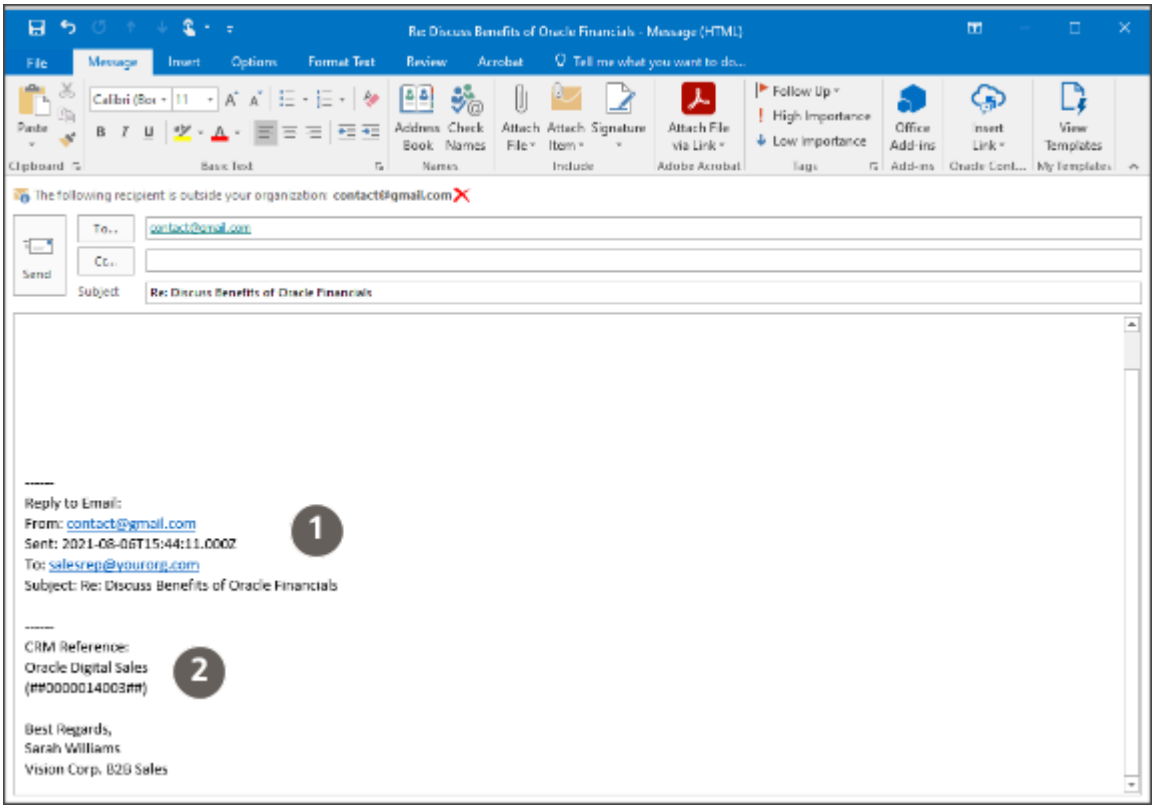
You compose emails in Microsoft Outlook or another client. The main differences are:

- The tracking code is visible in your out-going draft, though it's not visible to the recipients. Here's a sample code:

```
------
CRM Reference:
Oracle Sales
(##0000014003##)
```

- In Office 365, the entire email thread is automatically copied in outgoing replies. In the Outlook client, the email recipient sees only the header and the subject of the email you're replying to.

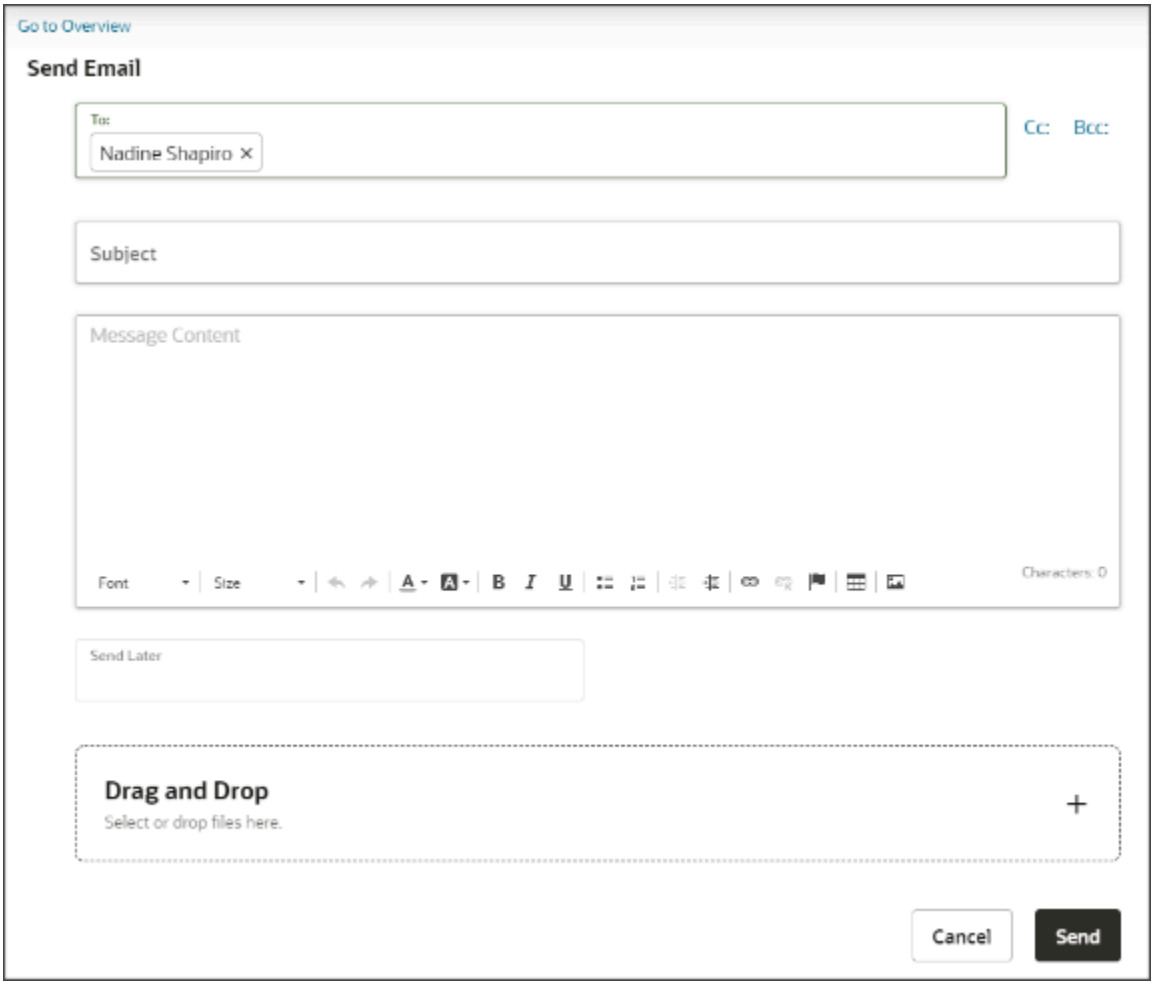
  Here's a screenshot of a sample email compose window in Outlook when you reply to an existing thread with a contact. The reply includes only the subject of the email you're replying to (callout 1) and includes a reference number that email recipients don't see (callout 2):



Oracle Sales UI with Microsoft Exchange

You compose your initial email in the Sales UI.

Here's a screenshot of the Sales compose page:



Just like with the other Exchange options, you can view customer replies and continue the conversation either in Sales or in the client you're using. Here are a couple of differences:

- You see the emails you compose recorded in Activities right away. You don't have to wait a few minutes for them to appear as you do with the other options.
- The Sales UI doesn't save your draft, so you must send the email before you close the browser tab.
- You can't use your signature for the initial email and any others you send from Sales.

Oracle Sales UI with Oracle Email

If your organization isn't implementing integration with Exchange, then you use the Sales UI exclusively to send and receive email. Here are the main differences:

- You can't use client applications to view and send emails. There are no email signatures, and you must send your email before you close the browser tab. Oracle Email doesn't save drafts.
- Unlike the other options, this one doesn't use your email address for outgoing and incoming emails. Your contacts see your name in the From: field as usual, but Oracle inserts a special email address with a code that identifies the email for tracking in the application.

Comparison Between the Different Options

Here's a quick comparison between the different options:

Email Feature	Microsoft Office 365	Outlook or Another Client That Integrates with Microsoft Exchange	Oracle Sales UI with Microsoft Exchange	Oracle Sales UI with Oracle Email
You must create the initial email in Oracle Sales.	Yes	Yes	Yes	Yes
Compose window you use in Oracle Sales	Microsoft Office 365	Microsoft Outlook or another client	Oracle Sales compose UI	Oracle Sales compose UI
Enables cc, bcc, and attachments	Yes	Yes	Yes	Yes
Hides autogenerated IDs in compose window	Yes	No	Yes	Yes
Displays email thread in replies	Yes	Only the subject and header of the most recent email you're replying to	Yes	Yes
Signatures and templates	Yes	Yes	No	No
Drafts get saved automatically	Yes	Yes	No for emails sent from the Digital Sales UI, including the initial email. You can save drafts in your client application.	No
Uses your own email address in the From: field	Yes	Yes	Yes	No. The recipient sees the sender's name, but the application includes a computer-generated reply email address.
Send later at a scheduled time	Yes	Depends on which client you use	No	Yes
How you know you have mail	Receive notification (bell icon) in Oracle Sales Check Inbox	Receive notification (bell icon) in Oracle Sales Check Inbox	Receive notification (bell icon) in Oracle Sales Check Inbox	Receive notification (bell icon) in Oracle Sales
Where you can read and respond to replies, including attachments	Inbox in Microsoft Office 365 Outlook In the Activities page of the Oracle Sales record where you composed the initial outgoing email and in the Activities page of the contact	Outlook or other client Inbox In the Activities page of the Oracle Sales record where you composed the initial outgoing email and in the Activities page of the contact	In the Activities page of the Oracle Sales record where you composed the initial outgoing email and in the Activities page of the contact In a client application integrated with Microsoft Exchange.	In the Activities page of the Oracle Sales record where you composed the initial outgoing email and in the Activities page of the contact
When your initial email appears on the Activities page	In a few minutes, after a process runs	In a few minutes, after a process runs	Immediately	Immediately

Overview of Email Setup

You have the choice of setting up either Oracle Email or an integration with Microsoft Exchange.

Note: As of June 2023, Microsoft Exchange doesn't support the REST APIs to access on-premises mail boxes, so you must set up your integration with the cloud version only.

Option	Setup Description	Where to Get More Details
Microsoft Exchange	To set up the integration with Microsoft Exchange, you must perform setups in Microsoft Azure, Microsoft Exchange Server, and Oracle Sales. • In Microsoft Azure, you create an application for the integration and provide application access to the mailbox. If you're using the Microsoft 365 add-in, you must create a new application in Microsoft Azure for this integration. • In Microsoft Exchange Server, you create a rule to add identifying information in emails. • In Oracle CX Sales, you must register your choice to use Microsoft Exchange by setting the system profile option ORA_ZCA_DS_EMAIL_OPTIONS to **`MS Exchange with Redwood Compose UX`**. By default, the profile is set to Oracle Email.	See the topic: *Microsoft Exchange Email Integration in Oracle Sales*
Oracle Email	If you aren't using Microsoft Exchange, set up Oracle Email. The setup involves: • Registering access points. • Configuring an email channel. • Running scheduled processes to retrieve inbound emails. • Setting profile options to display past conversations in the outbound emails.	See the topic: *Oracle Email Integration with Oracle Sales*

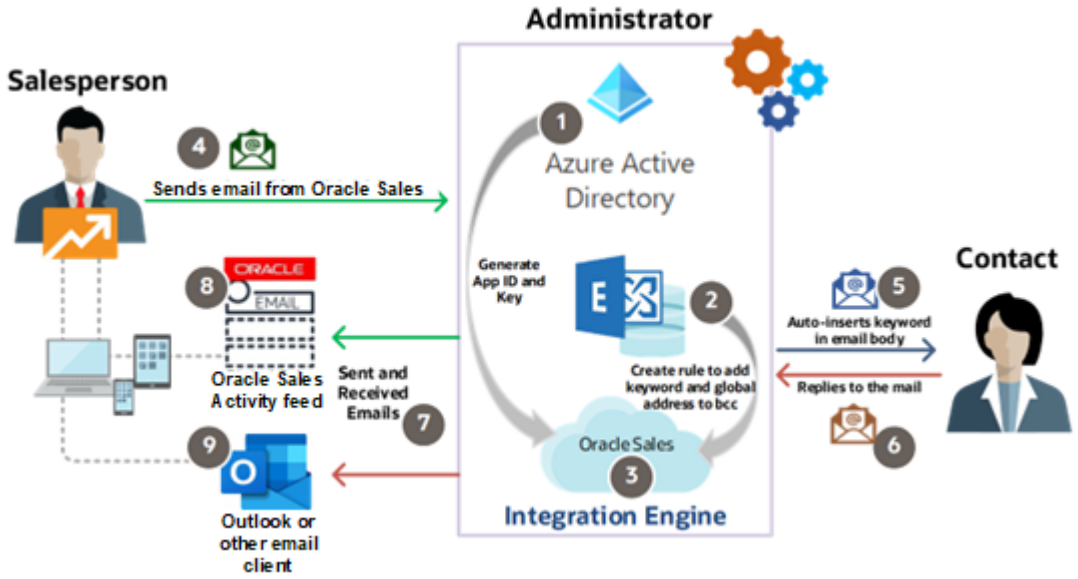
Microsoft Exchange Email Integration in Oracle Sales

The Microsoft Exchange email integration lets salespeople send emails from the Contacts, Accounts, Opportunities, and Leads work areas in Oracle Sales. They can see an entire email conversation related to a particular record they're working on without leaving the work area.

Exchange Email Overview

The Exchange email integration saves sent emails to the activity feed and to the Sent Items folder of the native email client. When a recipient replies, the reply appears as a thread to the originally sent email in the activity feed. Exchange saves the reply to the inbox of the sender as well.

Here's a diagram of the Exchange email integration process:



This table details the integration steps:

Integration Step	Description
Administrator sets up the Exchange integration	Set up the integration in three areas: 1. Microsoft Azure 2. Microsoft Exchange Server 3. Oracle Sales **In Microsoft Azure** (callout 1): Create an application for the integration and provide the read, write, and send application permissions. This lets the application access the mailbox. **In Microsoft Exchange Server** (callout 2): Create a rule to search for a keyword in the subject and the email body of the sent and received emails, and add the global address to the `bcc`. **In Oracle Sales** (callout 3): Set Exchange as your email server in Sales using a profile option. Using the email Integration page, associate the application you created in Azure with the rule you created in Exchange. This association means that the integration engine controls the compose email action in Oracle Sales.
User initiates an email conversation from Sales	When an email is sent to a contact from Sales (callout 4), the integration engine inserts the keyword in the background of the email body (callout 5) and sends it to the contact. Exchange (based on the rule) forwards a copy of the email with the keyword to the sender's global address and saves it in the activity feed of Sales (callout 8).
Recipient replies and the salespeople see the reply in Oracle Sales	When the recipient replies (callout 6), the integration engine displays the reply on the Sales activity feed by identifying the keyword, auto inserted in the first sent email. All the sent and received email conversations in the thread (callout 7) are shown in the Oracle Sales activity feed.

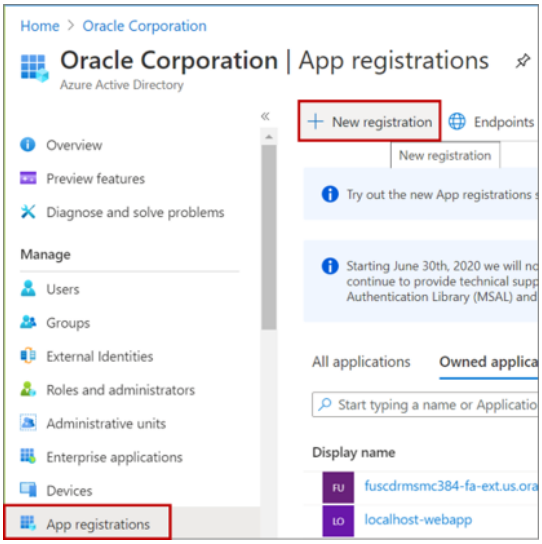
Integration Step	Description
	If your user is using a native client, such as Outlook, the email chain also shows up in the sent items and inbox of the native email client of the sender (callout 9).

Microsoft Azure Setup Steps

If you have reused the Application ID and key of Microsoft 365 add-in for the Exchange email integration, before proceeding with the Set up in Microsoft Azure, read through the FAQ: I already have an app registered with Microsoft Azure for Microsoft 365 add-in. Can I reuse the Application ID and Key of that app for the Exchange email integration?

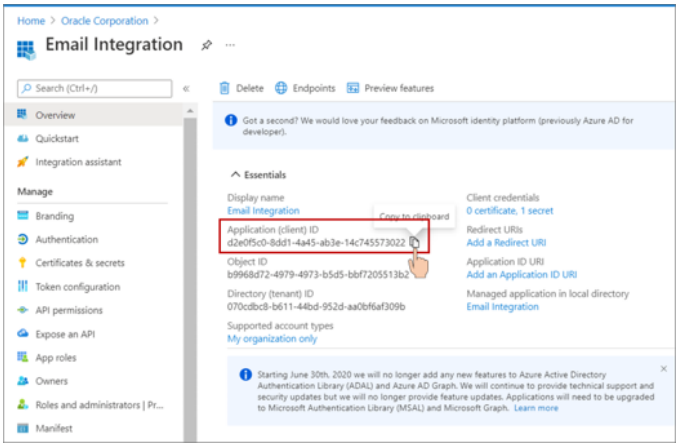
Here are the steps to create a new application for Exchange email integration that uses Microsoft Graph API:

1. Sign in to Microsoft Azure at https://portal.azure.com.
2. In the Azure Services, click **Azure Active Directory**.
3. In the left pane of the Azure Active Directory Overview page, click **App registrations**.
4. Click **New Registration**.

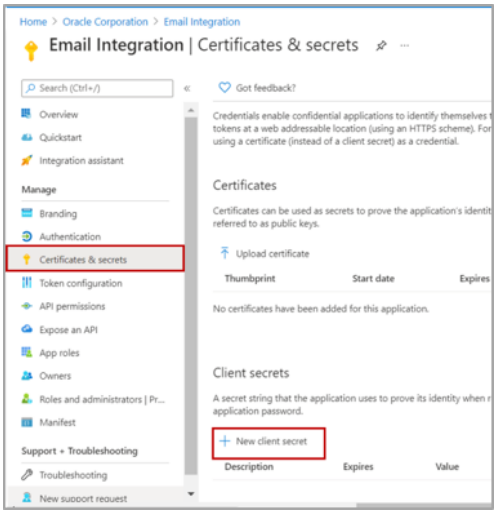


5. On the Register an application page, make these entries:
   a. Enter a name.
   b. For Supported account types, make sure **Accounts in this organizational directory only (tenant name - Single tenant)** is selected.
   c. Click **Register**.

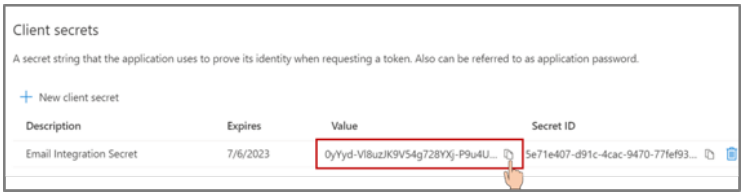
6. Microsoft Azure registers and generates an ID for your application. Copy the **Application (client) ID** for later use, as shown in this sample image.



7. Go to **Certificates & secrets** to generate the secret or the Application Key.
    a. On Certificates and secrets, **Client Secret** section, click **New client secret**, as shown in this sample image.

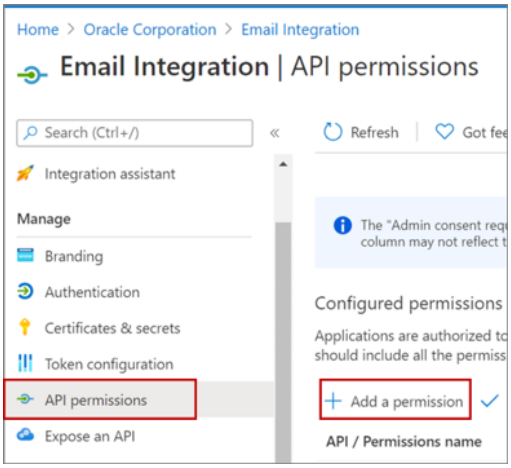


    b. Enter a name, for example, `Email Integration Secret`.
    c. Select the longest tenure. Microsoft allows two years from the Start Date.
    d. Click **Add**.
    e. Copy the generated string from the **Value** field, as shown in this sample image. Value is the application key.

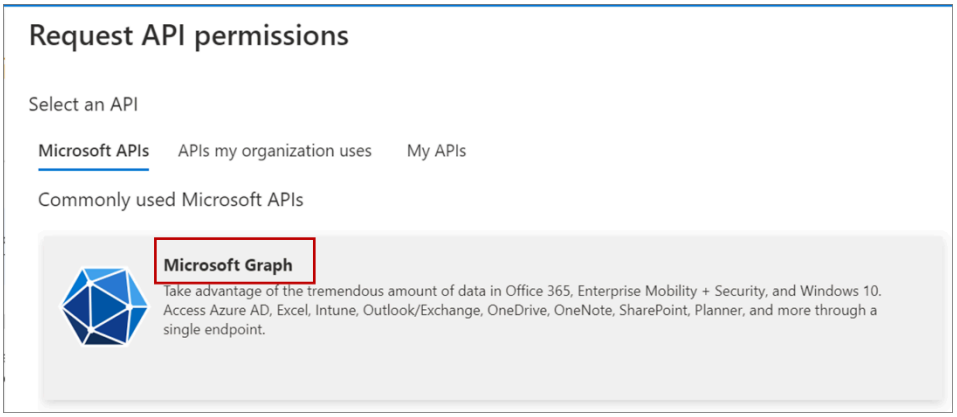


8. Go to **API permissions** and click **Add a permission**.

   Here's a sample image of the API permissions navigation node and the Add a permission option:

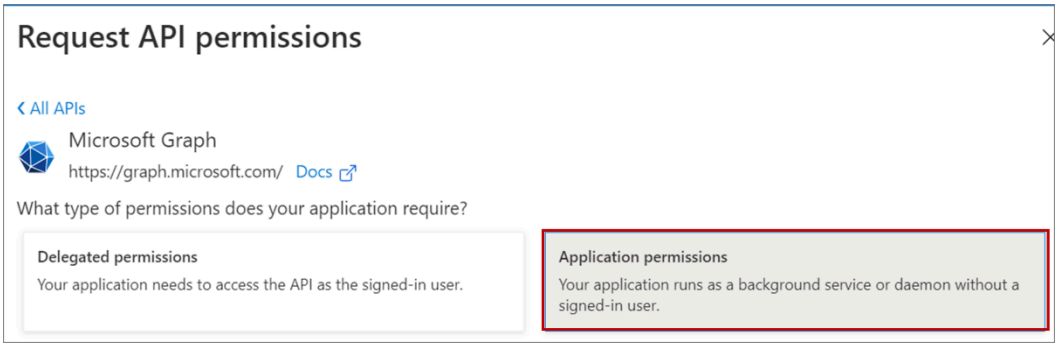


   a. On Request API permissions, click **Azure Active Directory Graph** under Microsoft APIs, as shown in this sample image.



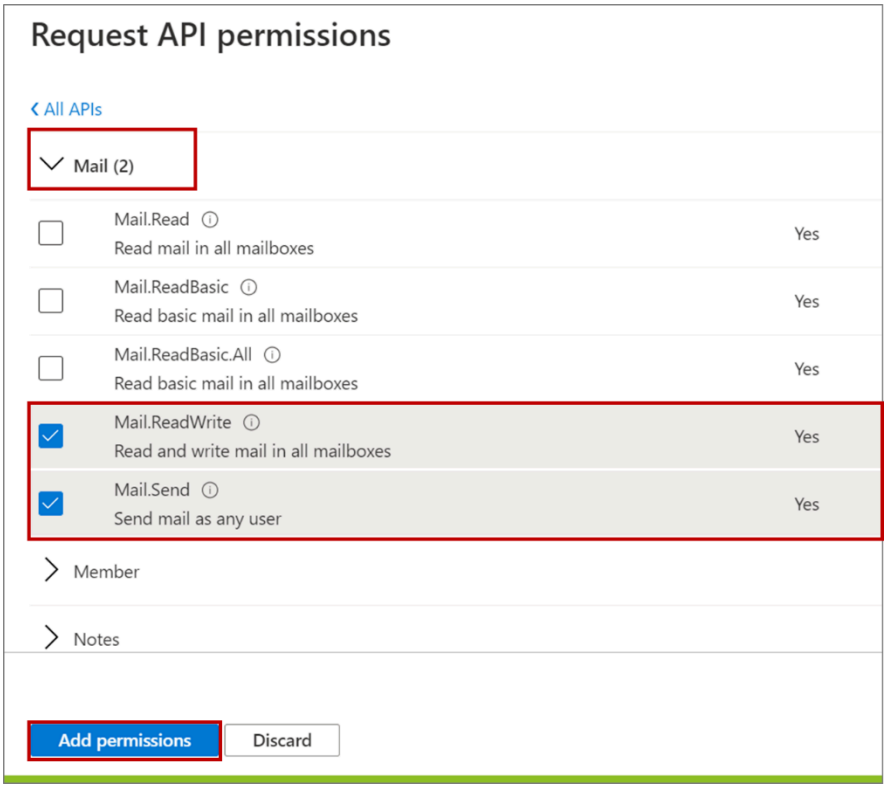
   b. Click **Application permissions**.

      Here's sample image of the Application permissions option:



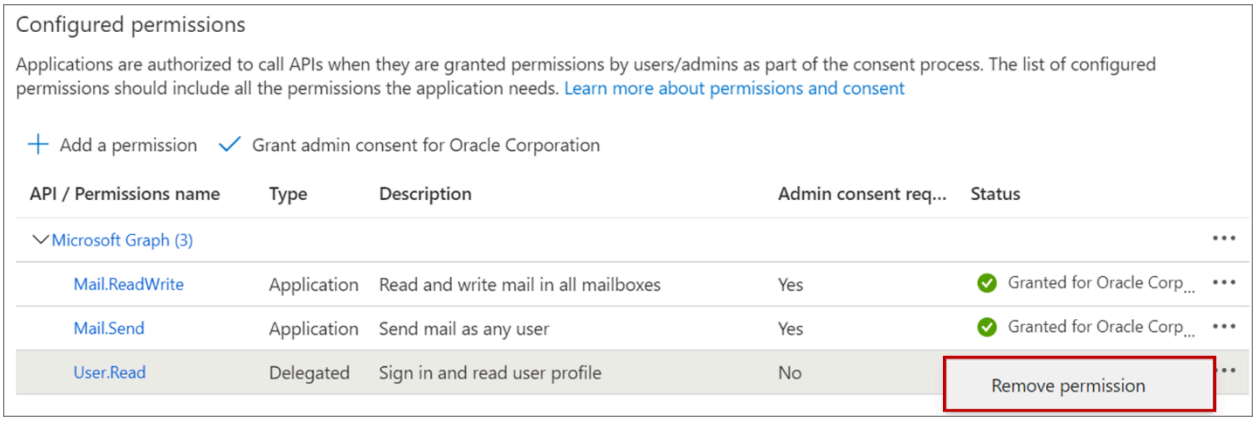
      See also: *Enable Microsoft Application Permissions So Sync Continues without Re-Authentication*

c. Expand **Mail** and select **Mail.ReadWrite** and **Mail.Send** permissions, as shown in this sample image.

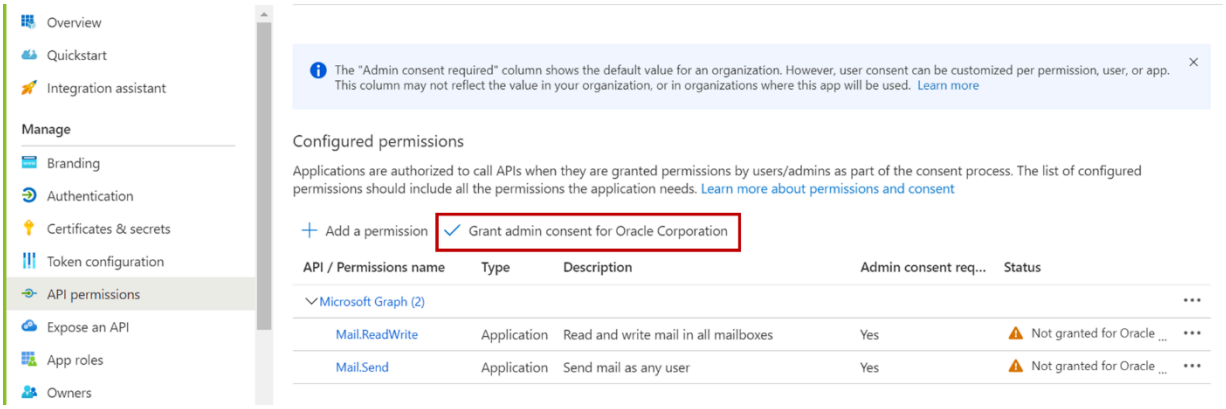


d. Click **Add permissions**.

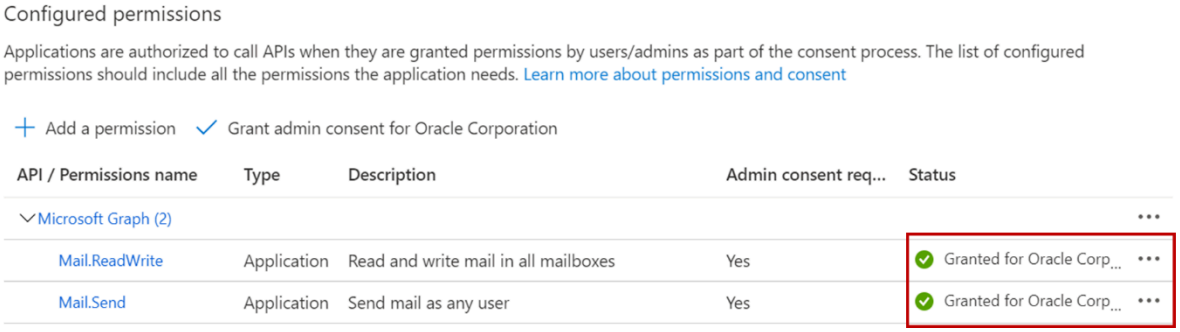
9. Remove the default User.Read Delegated permission, as shown in this sample image.



10. Click **Grant admin consent** and click **Yes**, as shown in this sample image.



The status of the permissions changes to Granted, as seen in this sample image.

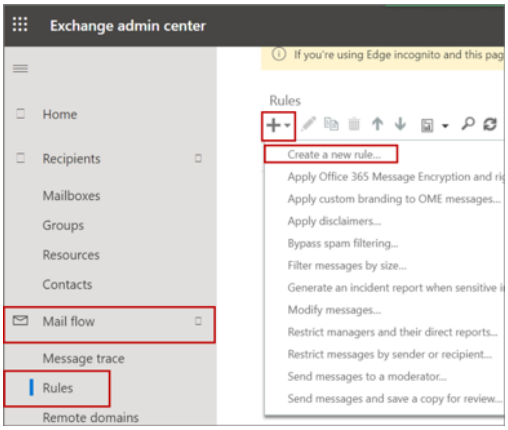


Microsoft Exchange Administrator Center Setup Steps

1. Sign in Microsoft Exchange at: https://admin.exchange.microsoft.com/.
2. Go to **Mail flow** > **Rules**.

> **Note:** Ensure that your network settings allow access to Microsoft Exchange when you're connected on VPN. Otherwise, you might have to disconnect from your VPN before setting the rule.

3. Click the plus icon and select **Create a new rule**.



4. Enter a name.
5. For **Apply this rule if**, select **Subject or body contains a rule** and enter a keyword. Though Microsoft Exchange lets you to add many, add only one keyword. The keyword you enter here, is used as the hidden keyword in the Email Integration setup of the sales application.

6. In **Do the following**, select **Bcc the message to**.
7. Add your global address and click **OK**.

   The email you enter here is used in the Email Integration setup of the sales application.
8. Click **Save**.
9. Ensure that the priority is set to the highest.
10. To set the priority to the highest, select the rule and click the edit icon, as shown in this sample image.

11. In the edit mode of the rule, set **Priority** to 0 and save your changes.

Email Integration in Sales Setup Steps

Use the Manage Microsoft 365 task to configure the settings for email integration.

1. In the Setup and Maintenance work area, use the Manage Microsoft 365 task: Go to the **Sales offering** > **Integrations functional area** > **Manage Microsoft 365 task**.
2. On the Manage Microsoft 365 page, go to the **Email Integration** tab.
3. Read and accept the integration notice.
4. On the **Email Integration** tab, make these entries:
   a. Enter the **Application ID**, generated in Microsoft Azure.
   b. Enter the **Application Key**, secret value generated in Microsoft Azure.
   c. Select the **Email Integration Enabled** check box so that other applications such as Oracle Sales can use the email integration service.
   d. For the **Email Integration Address**, enter the global email you provided in the rule created in the Microsoft Exchange portal.
   e. For the **Email Integration Keyword**, enter the keyword you entered in the rule created in the Microsoft Exchange portal.
   f. Click **Save and Close**.
5. Go to the Manage Administrator Profile Values task, search for the Digital Sales Email Options Enabled (ORA_ZCA_DS_EMAIL_OPTIONS) profile option and select the following **Site** value:
   a. MS Exchange with OS Native UI: Select this to route the email flow via Microsoft Exchange and use the native email client such as Apple mail. When a user clicks Compose Email in Oracle Sales, the native client compose window appears.
   b. MS Exchange with Redwood Compose UX: Select this to choose the Oracle Sales UI for composing the emails and send or receive them via Microsoft Exchange server.
   c. MS Exchange Office 365 UI: Select this to route the email flow via Microsoft Exchange and use Microsoft 365 (Outlook) as an email client. When a user clicks Compose Email in Oracle Sales, the Microsoft 365 client appears.

> **Note:** Oracle Email is the default site for the Digital Sales Email Options Enabled profile option. The email flow is routed through the Oracle Email service, using Oracle Sales as the email client. Salespeople send and receive emails using the Oracle Sales UI.

Run the Exchange Sync Process

Run the Microsoft Exchange Email Sync scheduled process to see the inbound emails in the activities list of Oracle Sales.

See the *Microsoft Exchange Email Sync Job* topic to learn more about this job.

Oracle Email Integration with Oracle Sales

Sales teams can use the integration with Oracle Email to send and receive emails in the Oracle Sales application. Emails can be sent directly from the Contacts, Accounts, Opportunities, or Leads work areas.

To set up this feature, you need to complete a few steps:

1. Set Oracle Email service as the mail server for Oracle Sales, by setting the ORA_ZCA_DS_EMAIL_OPTIONS profile option.
2. Register access points. This includes setting the SVC_INBOUND_EMAIL_ADDRESSES profile option.
3. Configure an email channel.
4. Schedule the Retrieve Inbound Email Messages process to retrieve inbound emails.
5. Set three profile options to display past conversations in the outbound emails.

These steps are all covered in this topic.

Set Oracle Email Service as the Mail Server for Oracle Sales

Set the ORA_ZCA_DS_EMAIL_OPTIONS profile option to use Oracle Email service as the mail server for Oracle Sales:

1. In the Setup and Maintenance work area, use the Manage Administrator Profile Values task: **Sales offering** > **Sales Foundation functional area** > **Manage Administrator Profile Values task**.
2. In the Manage Administrator Profile Values page, select **Oracle Email** as the site value for the ORA_ZCA_DS_EMAIL_OPTIONS profile option.

Register Access Points

For emails to process successfully, you need to register the email addresses in the SVC_INBOUND_EMAIL_ADDRESSES profile option as access points:

1. Go to the **Manage Email Configuration, Registration, and Validation** task. The Access Point Value of the Access Point Setup region shows the email addresses specified in the SVC_INBOUND_EMAIL_ADDRESSES profile option.
2. Click **Register** on an email address to register it. Restart the servers to ensure the newly registered email addresses are active. Contact Oracle Support to restart the servers. If you unregister an email address, all inbound emails to that address are lost.

Configure an Email Channel

Set up an email channel to enable users to send and receive emails:

1. Go to **Manage Communication Channels**.
2. On the Service Channels page, click **Create Channel**.
3. In the Create Channel window, select a **Stripe Code**.
   Select **CRM** to process emails from and to external customers.
4. Select the **Channel Type** as Email.

5. Select **Purpose** as Sales.
6. Use the sales email ID of your company as the **Account Name**. For example: `sales@mycompanydomain.com`.

   If a forwarding rule is configured, all the emails that are sent to the specified sales email ID are forwarded to Oracle inbound email ID. If an outbound email is configured, Oracle emails the customer as the specified sales email ID.
7. Ensure that the generated **Channel Code** is unique.

   The channel code is autogenerated and identifies a communication channel when exporting or importing channels from one environment to another.
   - If the autogenerated channel code is unique, you can leave it unchanged.
   - If the autogenerated channel code isn't unique, add a set of characters to the code.
8. (Optional) Enter a **Display Name** to indicate any information about the channel such as the name of the organization for the channel. The new channel you create is active by default.
9. Click **Save**.

This table summarizes the details for email setup:

Email	Description
Inbound Email	Indicates the emails received from your contacts. As part of your implementation, set up a forwarding rule on your company email server to redirect these emails to Oracle inbound email ID. This is the email account that Oracle provided at the time of provisioning. For example, all the emails sent to `sales@mycompanydomain.com` are forwarded to `pod_name.fa.extservice.incoming@pod_name-opcwf.mail.dcsn.oraclecloud.com` for processing. Forward the sales emails to one of the email IDs provided in the SVC_INBOUND_EMAIL_ADDRESSES profile option.
Outbound Email	Indicates the emails sent by salespeople to the contacts. To ensure that the outbound email is delivered successfully to the external recipients, set up a Sender Policy Framework (SPF) policy on the domain. Set up an SPF policy on your domain as an authentication mechanism. The exact method of setting up an SPF policy varies from one domain provider to another. For example, `v=spf1 include:spf_c.oraclecloud.com ~all`.

Schedule the Retrieve Inbound Email Messages Process to Retrieve Emails

To retrieve emails at regular intervals, schedule the Retrieve Inbound Email Messages process to run:

1. From the Navigator menu, select the **Scheduled Processes** option.
2. In the Scheduled Processes screen, click **Schedule New Process**.
3. In the Schedule New Process dialog box, select **Job** for **Type**.
4. Search for and select the **Retrieve Inbound Email Messages** option from the **Name** drop-down list.
5. Click **OK**.

   The Process Details dialog box shows.
6. Click **Advanced**.
7. In the Schedule tab, in the Run options, select the **Using a schedule** option.

8. Select **Frequency** and specify a **Start Date**.
9. Click **Submit**.

Set the Profile Options to Display Past Conversations in Outbound Emails

To enable your sales team to see the past conversations in the email threads, configure the following profile options in the **Manage Administrator Profile Values** task. This table shows the profile options and their settings.

Profile Option	Description
SVC_EMAIL_ENABLE_PAST_CONVERSATIONS	This is the profile option to display past conversations. By default, it's set to No. Change the value to Yes to enable the past conversations.
SVC_EMAIL_NO_OF_PAST_CONVERSATIONS	This profile option sets the number of past conversations to be included in the email thread. The default value is 1. You can specify a value from 1 to 10. If you set the value to 0, past conversations aren't included. If you set a value greater than 10, only a maximum of 10 conversations are displayed.
ORA_SVC_EMAIL_PAST_CONVERSATION_SHOW_MSG_TYPES	This is the profile option to include the message type in past conversations. The default value is Y. The message type is translated based on the user locale. The default language may be different than the local language. For example, if the user locale is Japanese and the default language is Chinese, although everything gets translated to Chinese, only the message types appear in Japanese.

Related Topics

- Overview of Buy Side Scheduled Processes
- Submit Scheduled Processes and Process Sets

Create Email Templates (Message Templates)

You can create message templates that can be used both by salespeople and by automated processes in orchestrations. You create the templates for use with a specific business object. You can include attributes from that object as mail merge fields. Salespeople who are using the template to send emails to customers can modify the text and add their signatures and attachments.

Before you start

If you want to send HTML emails with images, then you must author the HTML ahead of time and copy it into the template. Any images must be referenced by URLs. Salespeople reviewing the emails before sending them don't see the HTML code.

Here's what to do

1. Sign in as the sales administrator or as a setup user. Don't enter a sandbox.
2. Navigate to **Configuration** > **Application Composer**.

3. Click **Message Templates**.

> **Note:** Don't click **Email Templates**. That's a different feature entirely.

4. On the Manage Message Templates page, select **+ Create** from the Actions drop-down list.
5. Give the template a name and description. Salespeople see the name when they select the template.
6. Select the object. A template can be used only for sending emails for that business object. For example, salespeople who email a customer from a leads record only see the active leads templates.
7. If you don't want to make the template available for use while you're drafting it, switch the **Active** switch off. Templates are active by default.
8. Enter the subject and message content.

   Use the Attributes list to insert the mail-merge fields.

> **Tip:** If the meaning of the attribute isn't intuitive, click the attribute to add it as a merge field to see its technical name. Some of the attributes in the list have the same name. For example, for Opportunities, there are two attributes with the name "Account". The technical name for the first is TargetPartyId. The second is TargetPartyName.

9. Click **Save**.

FAQs

I already have an app registered with Microsoft Azure for Microsoft 365 add-in. Can I reuse the Application ID and Key of that app for the Exchange email integration?

No. The latest version of the Exchange email integration uses Microsoft Graph API. That's why we recommend you create a separate app for the Exchange email integration.

If you've reused the application ID and key of Microsoft 365 add-in, do these two things first:

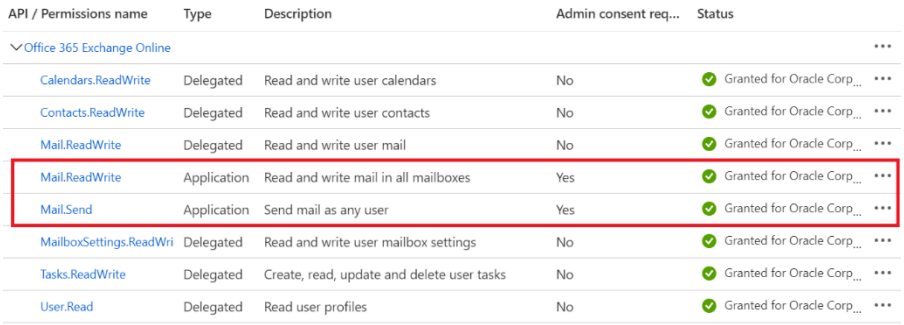
1. Disable the Microsoft Exchange email integration on that application.
2. Revoke the admin consent and remove the application mail permissions on that application.

Disable the Microsoft Exchange Email Integration

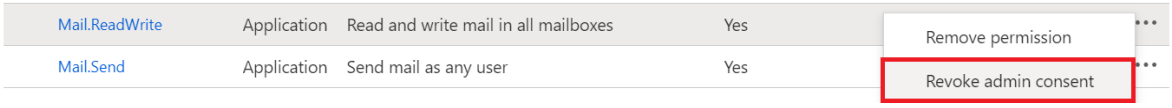
1. In the Setup and Maintenance work area, use the Manage Microsoft 365 task: Go to the **Sales offering** > **Integrations functional area** > **Manage Microsoft 365 task**.
2. On the Manage Microsoft 365 page, go to the **Email Integration** tab.
3. Deselect the **Email Integration Enabled** check box.
4. Save and close.

Revoke Admin Consent and Remove the Application Mail Permissions

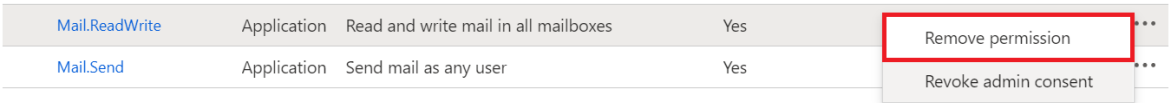
1. Sign in Microsoft Azure.
2. Find the Microsoft Azure application for Microsoft 365 add-in.
3. Go to the **API Permissions** tab.
4. In **Office 365 Exchange Online**, find the `Mail.ReadWrite` and `Mail.Send` application permissions.
   This image shows an example of the permissions:



5. Right-click on the Mail.ReadWrite permission and select **Revoke Admin Consent**. Repeat this for the Mail.Send permission.



6. Next, right-click on the Mail.ReadWrite permission and select **Remove permission**. Repeat this for the Mail.Send permission.



7. Now, create a new app for Exchange email integration using the steps provided in *Microsoft Exchange Email Integration in Oracle Sales* topic.

Can a user send an email to an external contact?

An external contact is a person who isn't saved as a business contact, lead, opportunity contact, or resource in Oracle Sales.

When a salesperson sends an email to an external contact from the context of the Lead, Opportunity, or Account UI of Oracle Sales, the sent email appears in the activity feed of the respective object. If the email is sent from a contact record, it's visible in the context of Contact but doesn't appear in the context of other parent objects.

Can a user send an email to a contact from Microsoft Outlook, outside of the Oracle Sales UI and still find it in the activity feed?

Yes. However, this only works if the sender has inserted the keyword manually into the email body or has copied the email to the global address.

All the subsequent emails and replies are also saved to the activity feed.

Note that if a sender copied to the global address only or the recipient removed the original message that contains the keyword, the replies won't be captured.

What are the email attachment size limits in Oracle Sales?

Users can attach a file of up to 10 MB to the email. The attachment of size greater than 10MB is saved to Oracle Sales as a web page link.

Related Topics

- What's the allowed attachment file type and size for sharing emails?