



ELOQUA ENGAGE IN SFDC

Sales User Guide

INTRODUCTION

Welcome to Eloqua's sales enablement tools training - Engage

Engage is one of Eloqua's Sales Tools. It alleviates the need to constantly re-create emails that are frequently used throughout the sales process. Ensuring you 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 you to send relevant, trackable emails on the go from your mobile phones and tablets.

Want to know more about it? Go to the next page!

SUGGESTED VIDEOS

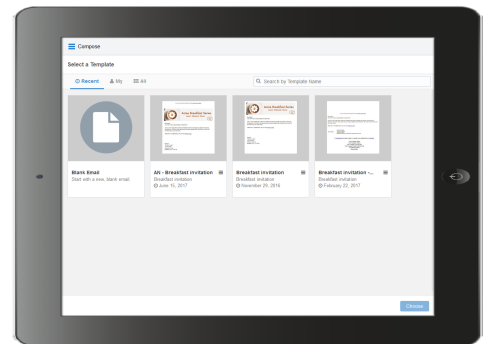
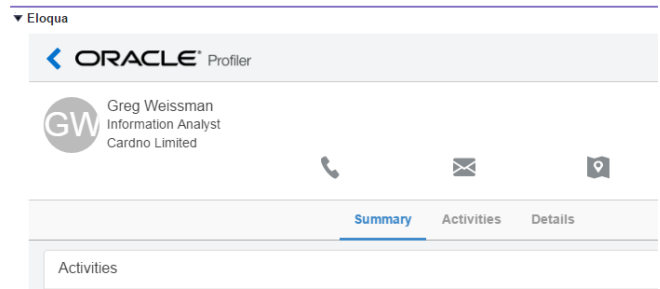
Eloqua - Sales Tools - Engage with Insight

1 Sending emails created in Eloqua

You can create and send a Marketing email directly in SFDC by using an existing email created in Eloqua by your Marketing team.

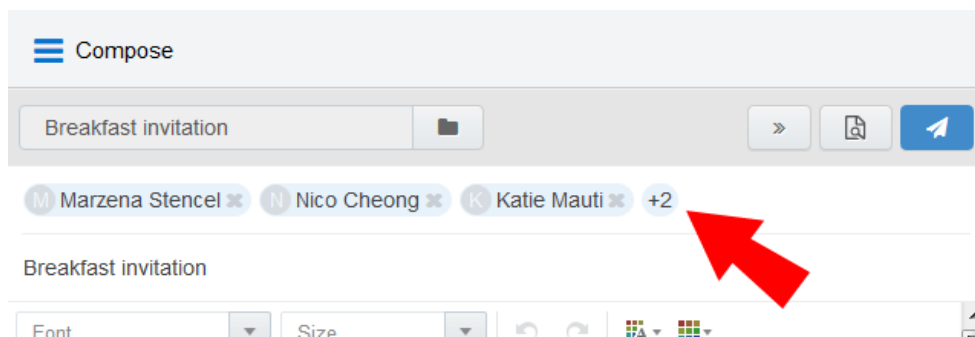
To send an email created in Eloqua:

1. Navigate to the Eloqua section at a contact level.
2. Click on the email address of the contact.
3. Select an existing email created in Eloqua:
 - i. The available Eloqua emails are displayed. Each email has a thumbnail image, file name, email subject, and date last modified. Twenty emails are displayed by default. Click **Load More** to view additional emails. You can also search for the desired Eloqua email. Sort your emails to quickly find the one you are looking for:



- ii. Select the email you want to use and click the **Select** button, or double-click the email.
You can go back and select a different email by clicking the folder icon again. Selecting a different email will override any change you have made.
4. 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](#) etc.
5. Enter the email recipients in the *To* line.

- As you enter an email recipient's name or email address, Engage searches your Eloqua contacts (if this permissions is enabled in Engage Global Settings). If you enter an existing Eloqua contact, the name is displayed in blue. New email addresses, that do not match Eloqua contacts, or ones missing a field merge value, display in orange. You are prompted to save these contacts before sending the email. Engage displays warning messages if contacts are globally unsubscribed or if the email addresses are flagged as bouncebacks. These contacts are displayed in red. After clicking **Send**, Engage also checks if your recipients are on the [master exclude list](#). You can remove the globally unsubscribed, bounceback, and master exclude recipients by clicking **Remove recipients** in the warning messages.
- Recipient email addresses are displayed in a single row. This allows for more space to edit your email when working on a smaller screen. You can expand to view all email addresses at any time.




- Recipients are not modified if you select a different template.

6. Modify the email subject.

- The email subject is pre-populated based on the template you selected. It can be modified.
- The email subject is replaced if you select a different template.

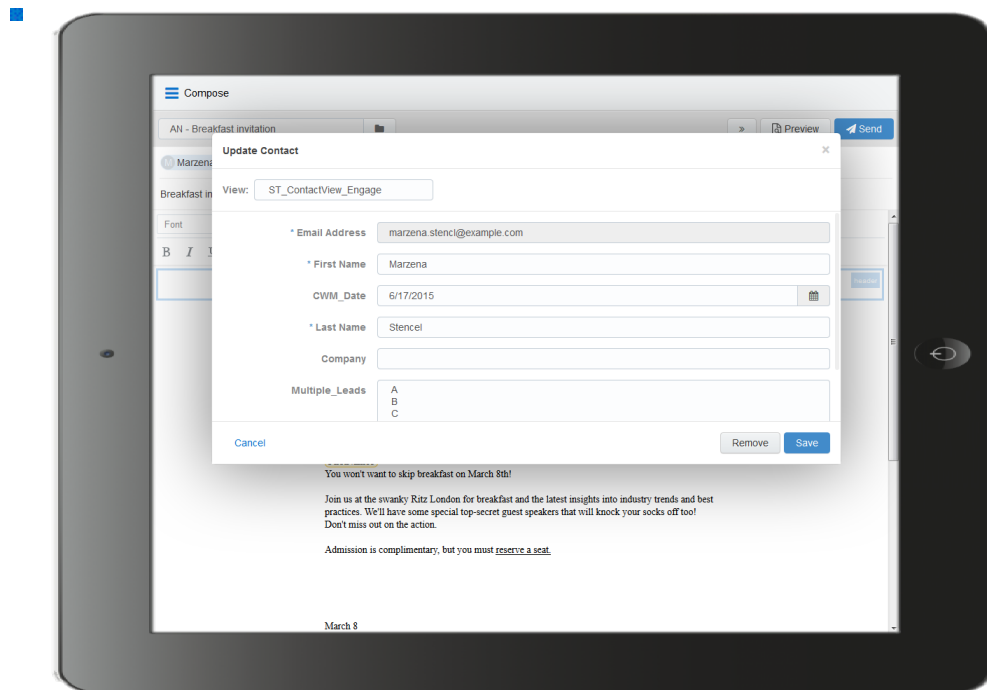
7. [Preview your email](#).

8. (Optional) Save your email:

- Click the  icon and select **Save As** or **Save**. *Save As* is available for users with asset creation permissions. *Save* is available for users who have edit permissions to the existing email.

9. Click **Send**.

- If you entered any email addresses for new contacts, which don't already exist in Eloqua, the *Create Contact* pop-up appears. You need to complete all required contact fields (marked with an asterisk).
- You must either **Save** each contact or **Remove** them from the email recipient list.



Once the email is sent, Engage displays your [Recent Emails Sent history](#) and send status.

2 Previewing Engage emails

The preview feature allows you to validate the email content prior to sending. The preview displays the email that will be sent to the first recipient, and populates any necessary field merges (body, signature, and so on). You can preview your email and return to editing, as necessary.

To preview an Engage email:

Note: The **Preview** button is enabled once the *To* and *Subject* fields are populated.

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.


1. Click **Edit** in the preview screen to return to the Engage email and continue editing, or click **Send** to send the email.

3 Viewing email sent history

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

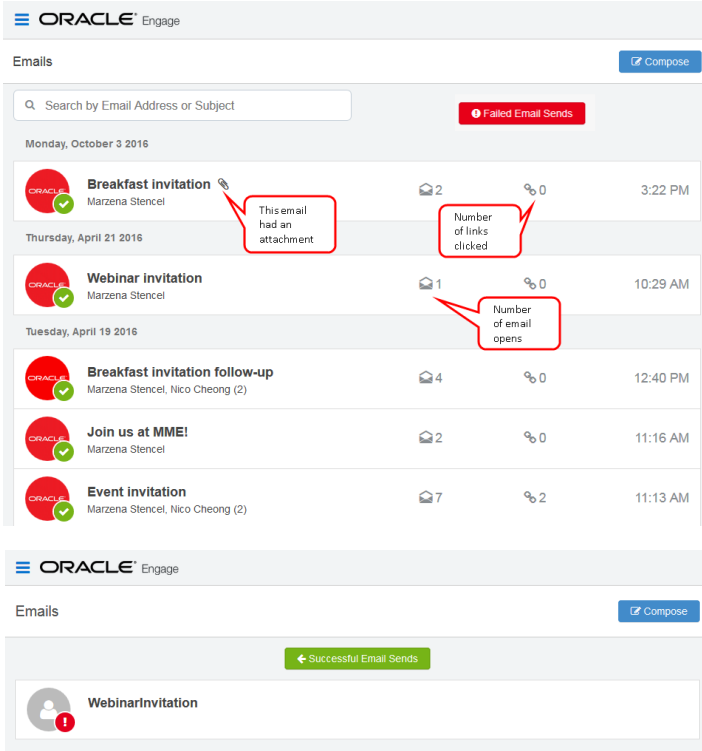
To view email sent history:

1. Navigate to the Engage home page using one of the following methods:

- Logging in to Engage.
- Click the Engage icon 
- Sending an email. .

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

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



The screenshot shows the Oracle Engage interface. At the top, there's a header with the Oracle logo and 'Engage' text. Below it, a search bar and a 'Compose' button are visible. The main section is titled 'Emails' and contains a list of sent emails. Each email entry includes a thumbnail, subject, sender, status icon (green, orange, or red), and counts for opens and clicks. Red callout boxes highlight specific details: 'This email had an attachment' points to a green icon, 'Number of links clicked' points to a '0' next to a link icon, and 'Number of email opens' points to a '0' next to an open envelope icon. The list includes emails like 'Breakfast invitation', 'Webinar invitation', 'Breakfast invitation follow-up', 'Join us at MME!', and 'Event invitation'. At the bottom, there's a 'Successful Email Sends' section showing a 'WebinarInvitation' with a red icon.

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 emails

- **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.