

Email Connection Tab for Outlook Users

Learn how to connect your Sales Engage account with Outlook.

What's in this article?

[Connecting to Outlook Online](#)

[Connecting to Exchange On-Premise](#)



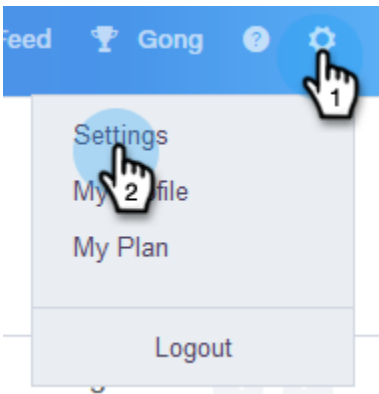
Note

Each user needs to connect to Outlook from their Sales Engage account.

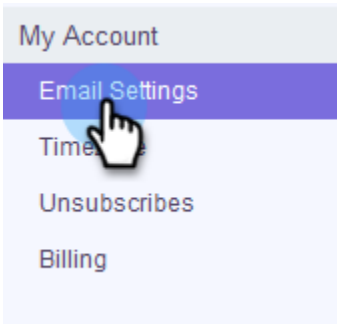
Connecting to Outlook Online

Connecting to Outlook means you'll receive reply tracking, access to the Outlook delivery channel, the ability to schedule emails in Outlook, and send compliance.

1. In Sales Engage, click the gear icon and select **Settings**.



2. Under My Account, select **Email Settings**.



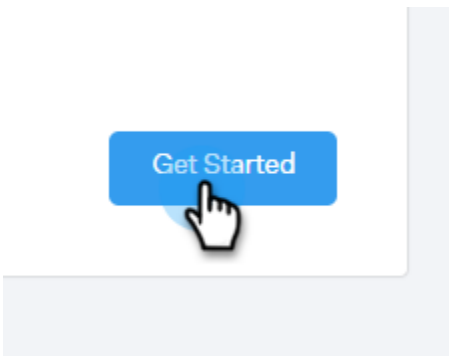
3. Click the **Email Connection** tab.

Email Settings

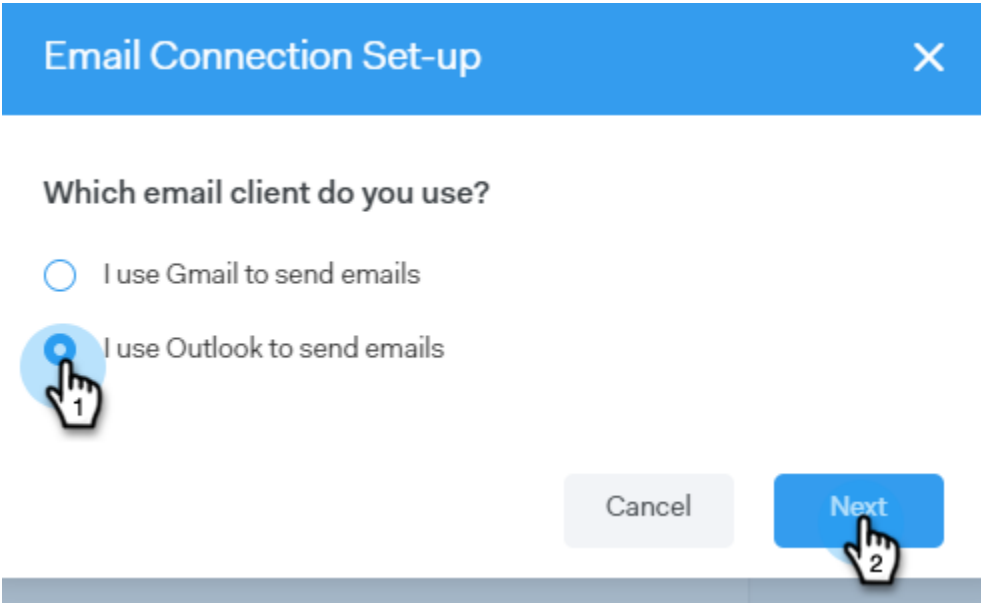
Address and Signature

Email Connection

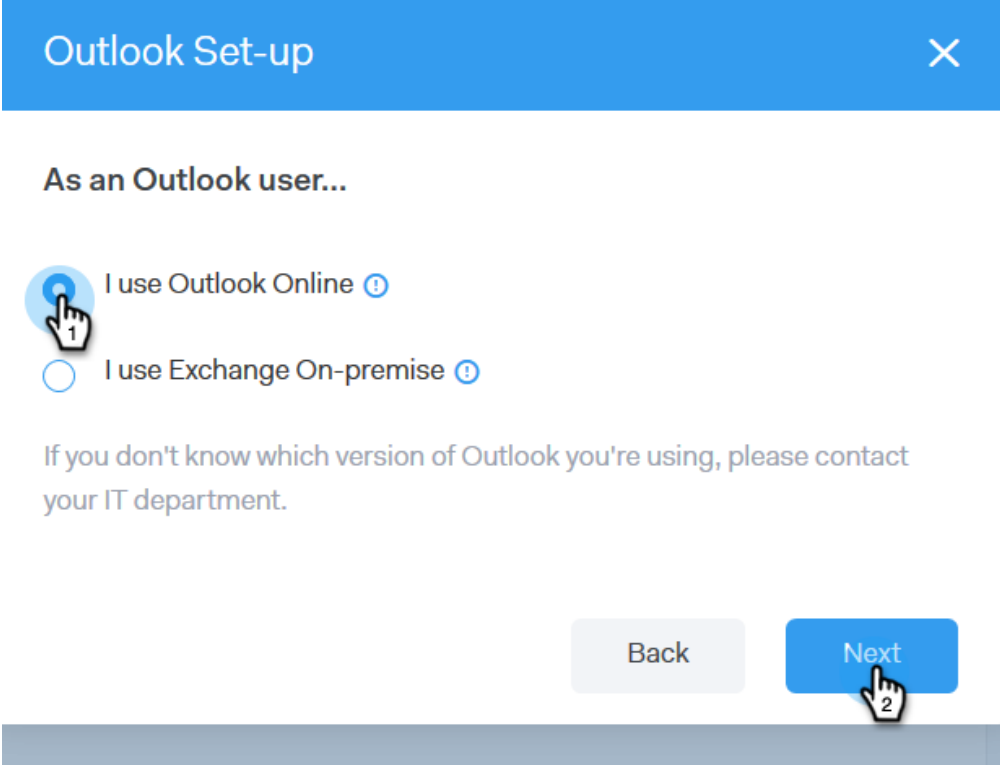
4. Click **Get Started**.



5. Select **I use Outlook to send emails** and click **Next**.

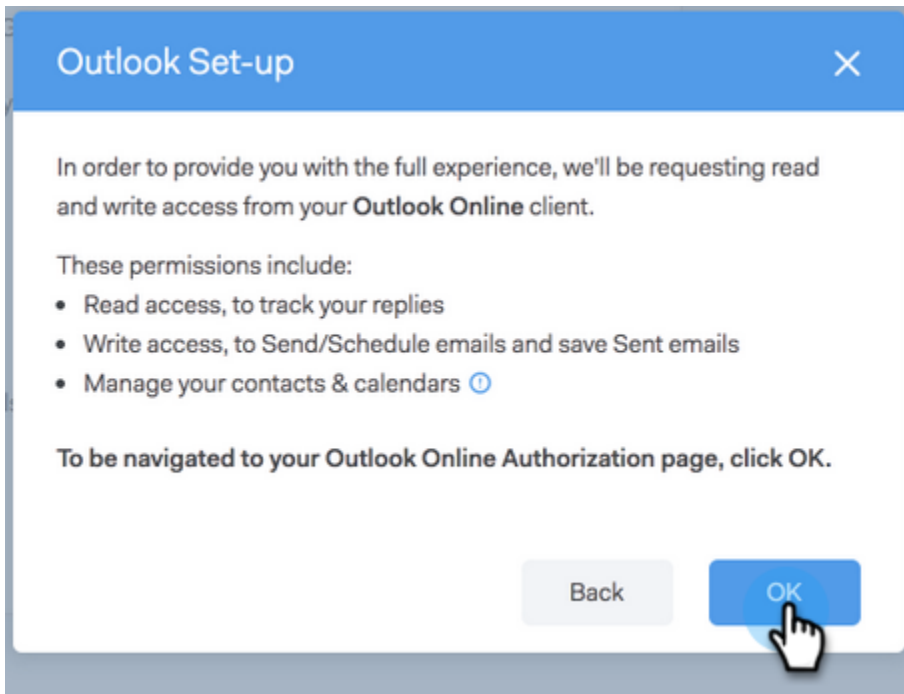


6. Select the version of Outlook you're using and click **Next**. In this example we're choosing Outlook Online.



Outlook Online	Also known as Office Online
Exchange On-premise	Includes Exchange 2013 and 2016

7. Click **OK**.



8. If you're not logged in to Outlook, enter your log-in info and click **Next**. If you are, choose the account you'd like to connect to and click **Next**. In this example, we're already logged in.



Pick an account



9. Click **Accept**.



██████████@marketo.com

Permissions requested

Marketo Sales Engage (Staging)

This app would like to:

- ✓ Read and write access to your mail
- ✓ Send mail as you
- ✓ Access your data anytime
- ✓ View your basic profile

Accepting these permissions means that you allow this app to use your data as specified in their [Terms of Service](#) and [Privacy Statement](#). You can change these permissions at <https://myapps.microsoft.com>. [Show details](#)



You can use this connection to track emails and also [as a delivery channel](#).



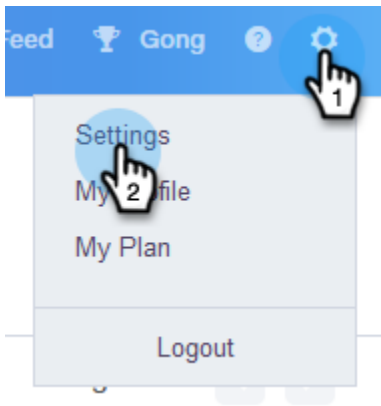
Note

When using Outlook as a delivery channel, you cannot send more than 300 bulk emails at a time.

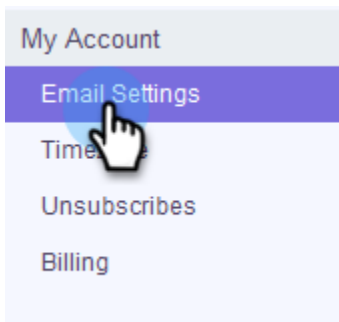
Connecting to Exchange On-Premise

Connecting to Exchange On-Premise means you'll receive reply tracking, access to the Outlook delivery channel, the ability to schedule emails in Outlook, and send compliance.

1. In Sales Engage, click the gear icon and select **Settings**.



2. Under My Account, select **Email Settings**.



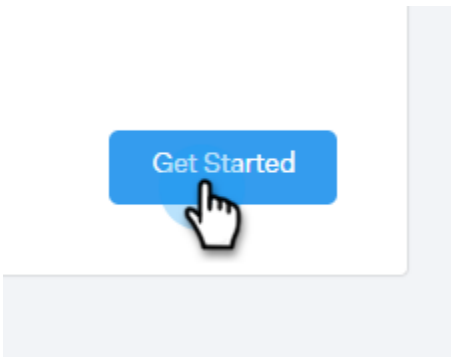
3. Click the **Email Connection** tab.

Email Settings

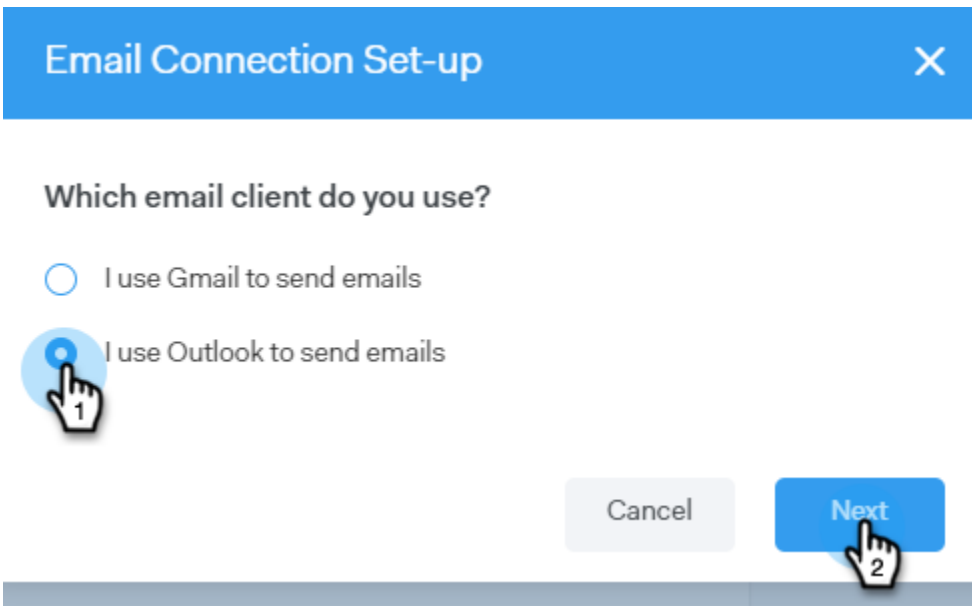
[Address and Signature](#)

[Email Connection](#)

4. Click **Get Started**.



5. Select **I use Outlook to send emails** and click **Next**.



6. Select the version of Outlook you're using and click **Next**. In this example we're choosing Exchange On-premise.

Outlook Set-up



As an Outlook user...

I use Outlook Online ⓘ

I use Exchange On-premise ⓘ

If you don't know which version of Outlook you're using, please contact your IT department.

Back

Next

Outlook Online	Also known as Office Online
Exchange On-premise	Includes Exchange 2013 and 2016

7. Enter your credentials and click **Connect**.

Exchange On-premise Setup



Please enter your credentials for Exchange On-premise

Email

salesengage@marketo.com

Password

●●●●●●●●●●●●●●●●

Exchange Version

Autodiscover

Exchange URL

https://

If on-prem autodiscover is disabled, please enter URL here

Back

Connect

Note

If you turn off Autodiscover in the Exchange Version drop-down, you'll need to ask your IT department for the Exchange URL.

You can use this connection to track emails and also [as a delivery channel](#).

Note

When using Outlook as a delivery channel, you cannot send more than 300 bulk emails at a time.