



Sage E-marketing for Sage CRM

HTML Designer's Guide to Email Templates

General Comments

Because the program puts so much unnecessary code in their HTML documents, DO NOT use Microsoft Word to create HTML emails. Front Page is a little better, but not much. We strongly suggest either coding by hand or using Dreamweaver. Open Source programs such as Nvu have not been tested yet.

The industry standard width for an email template is 600px wide. All images should be a resolution of 72dpi. Remember to keep a healthy text-to-image ratio.

Layout – DIV tags or Tables?

The best way to create your HTML email template is by using tables. Yes, this makes web designers cringe but you will get the best results when doing so! We've found that using a lot of nested tables will play nicer in the editor.

External Stylesheets

Do not link to external stylesheets. Most webmail clients will strip out your <body> and <head> code so it does not interfere with their own design code. Since <body bg color> might be stripped out in webmail clients, make the color inside the table. The best practice for styling fonts and images is to use inline styling. This means putting styles in the <h1> <p> (and so forth) tags.

Text –Sage E-marketing for Sage CRM Mail Merges

The Sage E-marketing for Sage CRM mail merge feature works with imported templates. Simply put in your mail merge tags in the HTML document before you import. Of course your available mail merge fields will depend on your own database, but here are the basic and most common:

- [[First Name]]
- [[Last Name]]
- [[Company]]
- [[Email Address]]
- [[Phone]]

- [[SpePersonalMessage]]

Text – Links

All links within your HTML document must be fully qualified URLs:

YES: <http://www.xyz.com/promo.htm>

NO: www.xyz.com/promo.htm or /promo.htm

All links will be tracked and available for viewing in your open-click reports as normal.

Images – General

Sage E-marketing for Sage CRM will host all of your images. Upon importing the HTML document, Sage E-marketing for Sage CRM will go through and ask you to upload each image it finds in your document. The images we highly recommend using are GIF and JPG files.

Do not use one image as your entire email. Not only are spam filters flagged with this type of thing, but if your recipient has their images turned off they will not be able to see your image/email at all. Use images to support text, not the other way around.

Background Images

Sage E-marketing for Sage CRM doesn't support background images. A lot of email clients such as Gmail, Yahoo! and Outlook don't allow or recognize background images – so we don't support them either.

Attachments

You should know that Sage E-marketing for Sage CRM does not send out attachments with emails for security reasons, but we will host PDFs when creating templates in our Online Editor. Unfortunately you do not have that opportunity to do so when importing templates. If you have a PDF document that you would like to be linked but don't have access to your web server for hosting, we suggest creating a Google account and uploading your PDF to GoogleDocs (<http://docs.google.com>). If you have a file that needs to be turned into a PDF, try PrimoPDF (<https://online.primopdf.com>) to convert your document first.

Finally – TEST, TEST, TEST!

Create accounts in various email programs to test how your email looks in each one. Some suggested clients are Outlook, Gmail, Yahoo!, AOL and Hotmail.