



Sage E-marketing for Sage CRM

Quick Start Guide to:

Importing a Template

To import a template in Sage E-marketing for Sage CRM's Template Manager, please follow these steps:

1. From the Sage E-marketing for Sage CRM Template Manager screen, click on the Import Template tab.

Swiftpage E-marketing Template Manager

Home Manage Templates Manage Images Manage Documents ?

Global Templates Local Templates **Import Template** Publish/Distribute Landing Pages

Import Template

Step 1 of 4: Upload html file

Select a HTML file

Browse...

Next

2. Click on the Browse... button, browse for your HTML file, and then click Scan for Sage E-marketing for Sage CRM to scan the file (a required step prior to importing).
3. Sage E-marketing for Sage CRM will perform a scan of your HTML document. If you receive a message saying "No unresolved Image references found," skip to Step 5 below.

4. If you receive a message saying, “Unresolved Image references were detected. These can be resolved in the next step” click on Next. In the screen that opens, you will see, in the dropdown list at the top, the image names from your imported template that need to be matched with their corresponding images.

Import Template

Step 3 of 4: Match References to Images Importing template: **cfg_ms_bales_wrong**

- 6 unmatched image references remaining

1 Choose Image reference to match:

2 Select Matching Image Reference

Upload:

or

Use:

Matched Image References (0)

* Unmatched Images will be displayed as a "Red X" on the verify page and must be changed before sending

Click on an image from the dropdown list, and then click Browse... (under number 2) to upload a new image or select an image from the dropdown list of images from your Image Library to use one of those. If you upload a new image, a window will appear (see below). Enter a name to save the image to your Image Library, then click Match

Import Template

Upload Image to match Image reference Importing template: **cfg_ms_bales_wrong**

Matching Image: **cfg_logo.jpg**

Image source: chat.JPG

Save Image as:

Image Thumbnail

You will be taken back to the screen asking you to match images. Repeat this process for all images listed in the dropdown menu. When all images are matched, you will see a message that says “All Image references have been matched. Click [Next] to continue Importing.” Click Next and proceed to step 5 below.

5. Look over the template to make sure it looks as you want it to. Check for image placement, text placement and so on. If it looks good, click on the “click here to verify” link at the very bottom of your template. If you need to make changes, click on Back button. If the Sage E-marketing for Sage CRM footer is not visible, click on “Footer not visible” to troubleshoot.
6. Once your template is verified, you are finished. You have imported your template into Sage E-marketing for Sage CRM and it can now be edited. Choose the Import Templates button to import another template or the Edit Template button to edit your imported template. Also, if you click on the Local Templates tab, you should now see your imported template listed.

Template Saved

The Editable template was saved to your Template Library as
'e_Test word to webpage'

Note If you dont see this Template listed in your Local Library,
click [Refresh] under the Local Templates tab

Import Templates

Edit Template