



There are dozens of little tips and tricks for using your Microsoft Dynamics CRM application that can make your life ever so much easier. We'll be bringing you a new tip every month in the hope that you find them useful.

The resident Altico wizard presents your April 2008 CRM tip:

Placing a Graphic into an E-mail Template

The Microsoft Business Solutions CRM e-mail templates are HTML and browser-based. As a result, the following requirements must be met to include a graphic in a template:

- You must be able to display the graphic in a browser. This means that .gif and .jpg graphic formats work best.
- The e-mail template is an HTML file. Graphics are not "embedded" or attached; rather, only a link is placed in the file pointing to where the actual graphic is located.
- The graphic must be on a Web site that the e-mail recipient can access.

Steps for adding a graphic to an e-mail template:

1. On the CRM Home page, click Settings, Template Manager, E-mail Templates.
2. On the Actions bar, click New E-mail Template.
3. Select a template type and click OK.
4. Complete the details of the e-mail template.
5. Open the Web page (using Internet Explorer) or Web site folder (using Windows Explorer) that contains the graphic. Usually all the graphics for a Web site are located in one folder. Links to the graphics in this folder are then placed in the Web files.
6. Copy and paste the graphic to your e-mail template. Although the graphic will appear, you have copied and pasted only the link to that graphic.
7. Save the e-mail template.

* * *

I'm NOT the resident wizard, but be that as it may, you're welcome to channel your questions through me.

Yours,

Marcia Nita Doron
Marketing Director
[Altico Advisors](#)
2 Mount Royal Avenue, Suite 410
Marlborough, MA 01752
508-485-5588 x107
mdoron@AlticoAdvisors.com
www.AlticoAdvisors.com