

## Top Tip

### Designing your own email template

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## ▶ The Problem

"I want to create a professional looking email template that Exclaimer Mail Utilities can apply to all my organization's outgoing email. It must include our logo, company colors and legal disclaimers."

## ▶ The Solution

### Creating your own email template

The ability to professionally brand the email that your organization sends can help you stand out from the crowd. For many organizations email is the predominant form of business communication and just like your headed letter paper it should fall in line with your organization's brand image.

Exclaimer Mail Utilities can help you to personalize your organization's email by applying your logo, colors, contact details and any other information that you might be required to include by law. It gives you the power to decide exactly where you want different parts of your email to appear like placing your disclaimer so that it only appears once at the end of a message with multiple replies.

#### Example:



The example above has the disclaimer after the main message but before the reply.

This guide aims to help you get to grips with creating your own email template that incorporates your corporate brand and allows you to comply with the latest legal and regulatory requirements.

## Before you start

1. If you haven't already done so, install **Exclaimer Mail Utilities 4.5** or later.

You can download the latest version from our website at **<http://www.exclaimer.com/download>**

Please note that you can also create your own email templates using older versions of Exclaimer Mail Utilities. However, this guide has been designed for use with Exclaimer Mail Utilities v4.5 and Exclaimer Mail Utilities 2007 v4.5.

## What you might need

It is best to collect all the information you might need before you start designing your email template. This could include your organization's logo, brand guidelines, examples of headed letter paper and a brief of what you legally have to include in the email messages your organization sends.

Note – it is important to check what local legislation applies to your organization to ensure your emails comply.

### **Checklist:**

1. Logos in the correct size and file format for the web (It is considered best practice to use small image files in the emails you send over the Internet).
2. Color references (in web-safe RGB Hexadecimal if you have them).
3. Example of headed letter paper.
4. The text, formatting and positioning required for any legal disclaimers (some disclaimers have to appear before the main body of the message).
5. Brand guidelines (if you have them).

Once you have all you need you can get started on designing your email template.

## The elements

In this guide we will look at all the elements you need to consider when designing your own email template:

### **Layout**

This dictates the shape of the email message and where the content can be placed.

### **Images**

Give the email a focal point and can enhance the overall design.

### **Fonts**

Helps to set the tone of the email whether it is light hearted or serious and styles the textual content.

### **Color**

Used to help divide up the email so that each part is easily identifiable and helps to communicate your corporate identity.

### **Useful information**

This can include contact information, marketing and personalized signatures. It is important to include all information that you think would be useful for the recipients of your organization's email.

Each of these elements form a vital part of making a complete and professional looking email template.

## Layout

The layout of your email gives it structure allowing all the elements within the email enough space to be easily read.

Exclaimer Mail Utilities' Disclaimer Editor allows you to design your email in HTML giving you control over the layout, text, formatting and images in your email template.

For more elaborate layouts you will need to use tables to control exactly where you want each element in your email to appear.

### Hints

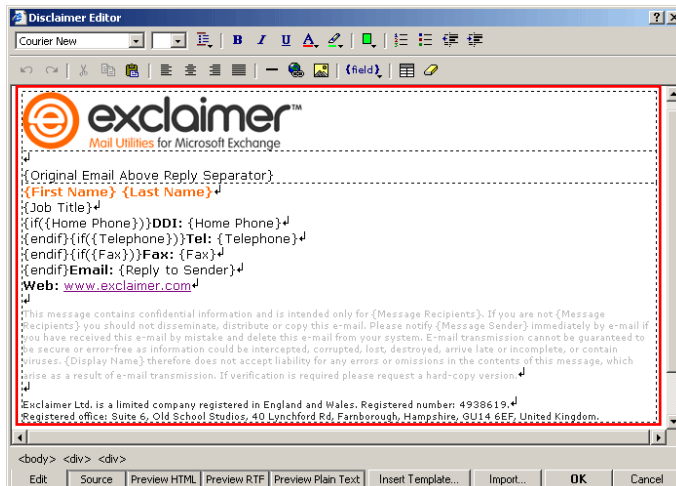
If you can, limit your use of tables to just one.

Use a transparent GIF for spacing.

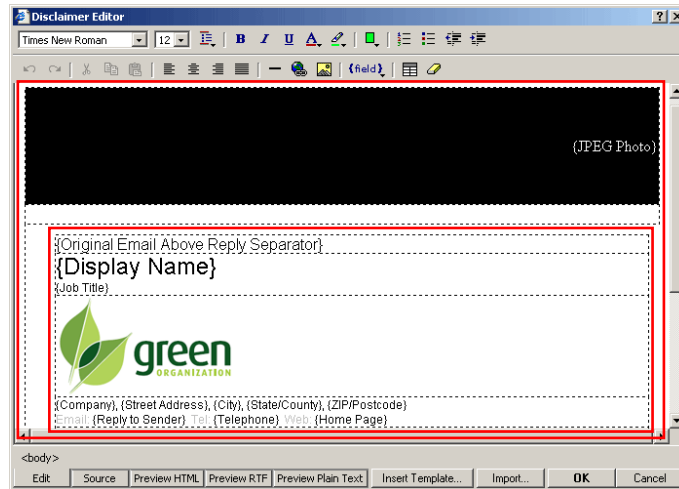
Minimize the number of columns and rows you use in a table.

Layouts can vary from the very simple (no HTML table formatting) to the very complex (requiring nested HTML tables), depending on what you want to include and how you want your email template laid out. These are a few examples of the different kinds of layouts you could use for your email template.

### Single table

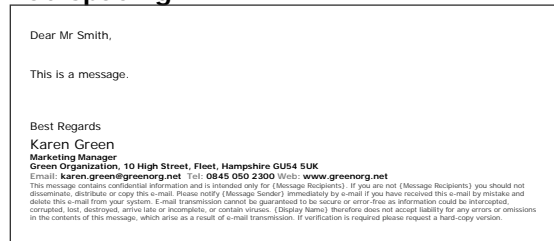


## Nested tables

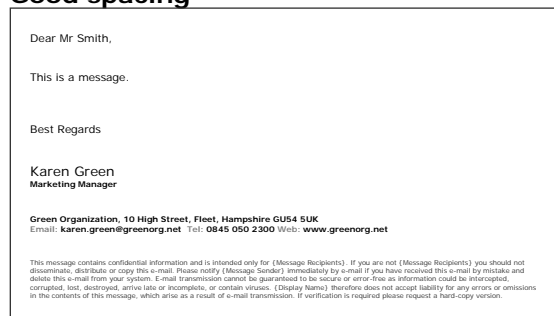


It is also good practice to space the text in your email template so that it is not all bunched up close together. It will make the information contained within the message easier to read. You can divide the information up into logical groups. For example, you could group name and job title, the contact information and any disclaimer text separately.

## Bad spacing



## Good spacing



## Images

Image can really help make your email messages stand out for both the right and the wrong reasons. Used in the right way they can reinforce your company's brand and are a great way of generating better brand awareness. Used in the wrong way they can make email messages un-necessarily large and distract from the content of the email message.

It is always good practice to keep the file size of the email messages you send to as small as possible as this both lightens the load on the Internet and helps speed up email delivery.

As a general guide you might want to keep your email messages (including images) to below 60KB. Large email messages can affect the long-term storage of email when compared with email messages that don't contain images. Exclaimer Mail Utilities can help mitigate this as our system can only add the images and email formatting as the email leaves your Exchange server. This means that internal or outbound email messages do not fill up your Exchange store with unnecessary images and HTML formatting.

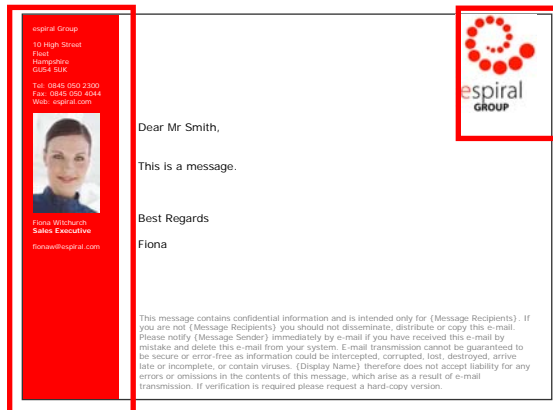
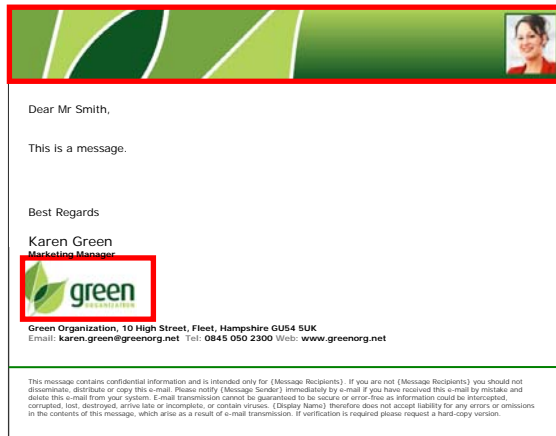
You now don't even have to worry if receive a lot of email with images and HTML formatting as one of our other products, Exclaimer Store Compressor can help you manage your Exchange store, utilizing flexible retention policies ensuring that emails are compressed, stripped of formatting and images, or deleted after a certain time period. Visit <http://www.exclaimer.com/storecompressor> for more information.

The image should be in an appropriate file format for the web (jpg, gif, png). It is recommended that you compress any images you include in your email template as much as you can without compromising image quality. The more you compress an image the smaller its file size. The less you compress an image the larger its file size.

The quality of the image should be sufficient to display clearly in the email without fuzziness or blocky, pixelated colors. Images should also be saved at the size you want them to display at in the email template.

Any images you use should not distract from the content of the message. It is important that the maximum size of a letterbox style image should not exceed 120 x 700 pixels as this is generally the most suitable width for displaying the entire image in a Microsoft Outlook Preview Pane. Vertical or skyscraper images should be no bigger than 600 x 100 pixels. Images larger than the sizes mentioned may distract from the content of the message.

### Example:



## Fonts

### Font Types

The choice of font can affect the way you read text. For example,

“**Comic Sans** is considered to be an informal or fun font. You wouldn’t necessarily want to use it for communicating serious legal, financial or personal information.”

“**Times New Roman** is a serious, formal font. This type of font is commonly used in books and broadsheet newspapers and is perfect for communicating information of a serious nature.”

It is a good idea not to mix different fonts on the same page as it can look messy and un-professional.

When choosing your font you should also consider that the client receiving the message may not necessarily have the fonts you have used in your email template installed on it and may replace them with substitutes. This could cause your email to look different from how it was intended to look. One way of ensuring that your template looks the same when it is processed by any server is to use a web safe font like Arial, Courier New, Georgia, Times New Roman and Verdana.

Broadly speaking there are two different types of font, Serif and Sans Serif.

**Examples:**

Serif



Sans Serif



**Example of serifs:**



The decorative corners and edges are called serifs (see the highlighted letter above). Sans Serif fonts do not have these decorative corner and edges.

Sans Serif fonts are considered to be easy to read on screen where as Serif fonts are supposed to be easier to read on the printed page. Whichever font you use it is important to consider why you are using it and if it fits in with the overall style of your organization.

**Font Size**

You should also pay particular attention to the size of the font you use. Too small and it becomes difficult to read, too large and it will look odd. For an email we recommend 10-12pt for body text and 8-12pt for signature and disclaimer text.

If possible, it is best to keep the font size you use in your disclaimer and signature text smaller than that used in the body of the message. This should help to avoid your signature and disclaimer text overpowering the message itself.

Please note that some compliance regulation will require your disclaimer text to be the same size or a larger font than the body of the email message.

## Font Color

The color of the font also plays an important role in how your message is read. For example, **bold red text** can be easily identified in a line of black text and is great for drawing the reader's attention. However, **bold yellow text** (bold yellow text) can often merge with the background.

You may also find that using a shade of gray (instead of black) makes your body text easier to read as the contrast between the background and the text is less harsh.

As well as the color of the text you also need to consider the color of the background as this can make text in certain colors difficult to read. For example:

pink text on a light blue background

orange text on a green background

## Font Emphasis

You can also use **bold**, *italic* and underlining to emphasize sections of text or words.

## Color

The use of color in an email can have a big impact on the way it is read. Using colors in a sensible way can make your email template very effective at both presenting the message content and communicating your organization's brand image.

We recommend that you use colors that are sympathetic to those used in your organization's logo. This should help to ensure that your email template matches your corporate branding.

Exclaimer Mail Utilities can help you to identify the colours used in your organization's logo with its logo colors tool. This can be found in the Colors dialog box which appears when you click on the More Colors after clicking on one of the Color buttons (Font Color, Highlight Color, Table cell or document background color) in the Formatting toolbar.

It works by analyzing your organization's logo and picking out the top 15 most used colors. These are ordered by dominance, with the most dominant being on the left. It then creates a list where you can select between the colors or you can handpick them yourself using an eyedropper tool.

Note – if you are using the 'Company Logo' User Defined Field this will be pre-selected by the Logo Color tool.

### Logo Color tool



It's a good idea not to use colour too liberally as it can distract from the content of a message. Keeping the colors you use in line with your brand guidelines will help to maintain a consistent corporate style.

## Useful information

For business email messages it is important to include information in addition to just the message itself. You could include your organization's address, and contact telephone numbers, website address, alternative email addresses or office opening hours. You can even include information on your organization's latest promotions and initiatives.

Depending on where you are in the world you may have to include specific information relating to the registration details of your organization. Whether or not you are legally required to include contact information in the email your organization sends it is good practice to provide all the details your recipients will need to contact you or your organization.

Including this kind of information can make it easier for the clients you email to contact you and can even help to open up more opportunities to do business.

### **Information you could include:**

Name

Job title

Email address

Direct dial telephone number

Office address

Office telephone/fax number

Website address

General enquires email address

### **Other**

Required compliance information

Marketing promotions and special offers

## Dynamic fields

Much of this useful information in the examples above can be stored in your Active Directory or Exclaimer Mail Utilities' User Defined Fields.

Exclaimer Mail Utilities allows you to insert information from your Active Directory and Exclaimer Mail Utilities' User Defined Fields into your email template.

If you use {fields} in your email templates the information from these fields will automatically populate any email you send with data from your Active Directory or Exclaimer Mail Utilities' User Defined Fields when it is sent.

Both AD and User Defined fields are particularly useful when you have lots information that you want to update quickly without having to edit your email templates. For example, if you have used a User Defined Field for inserting your company address in your email templates and your business moves offices you only have to change the address in one place and Exclaimer Mail Utilities updates wherever your {UD:Company Address:UD} appears.

You can also insert fields from your Active Directory so any of the information in your AD can be used in the email templates you design. For example, inserting the {Message Sender} field will insert the email address of the person who is sending the message. You can even insert a mailto link containing the email sender's email address by inserting the {Reply to Sender} field.

## Putting it all together

Putting all this advice into practice can appear to be rather daunting. To help you get to grips with your email template we have designed a few examples so you can see what is possible using Exclaimer Mail Utilities. You can even use these as a basis for creating your own email templates. You can access these templates from the Templates section of Exclaimer Mail Utilities.

Go to <http://www.exclaimer.com/downloads> to download the latest version of Exclaimer Mail Utilities and have a go for yourself.

### Examples:





## Tips and Tricks

### Placing Disclaimers

Placing a disclaimer/signature directly underneath each sent message, before the reply separator.

There are two ways that you can set up disclaimers/signatures. Method one inserts a disclaimer/signature at the bottom of the message, underneath any replies and method two inserts a disclaimer/signature directly below the message you send. In order to make use of these methods you first have to know the individual parts that form a complete email message.

How an email is broken down:

#### **{ Original Email Above Reply Separator }**

When creating or replying to an email message this is where the content of your message will appear.

#### **{ Reply Separator }**

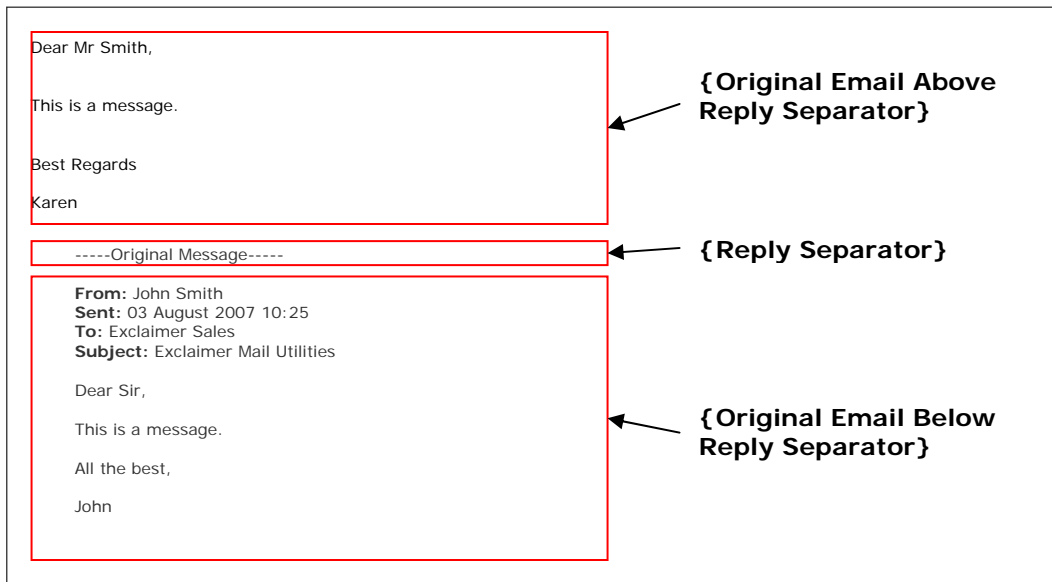
This item separates each reply in a message conversation.

#### **{ Original Email Below Reply Separator }**

When replying to an email message this is where the original message you are replying to will appear.

The combination of these three fields above is referred to collectively as **{ Original Email }**

## A simple email {Original Email}



### Method One:

#### { Original Email }

'Disclaimer text will appear below all the replies, right at the bottom of the email.'



## Method Two:

### { Original Email Above Reply Separator }

'Disclaimer/signature text will appear directly below the message you send.'

### { Reply Separator } { Original Email Below Reply Separator }

Dear Mr Smith,

This is a message.

Best Regards

Karen Green  
Marketing Manager



Green Organization, 10 High Street, Fleet, Hampshire GU54 5UK  
Email: [karen.green@greenorg.net](mailto:karen.green@greenorg.net) Tel: 0845 050 2300 Web: [www.greenorg.net](http://www.greenorg.net)

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This message contains confidential information and is intended only for (Message Recipients). If you are not (Message Recipients) you should not disseminate, distribute or copy this e-mail. Please notify (Message Sender) immediately by e-mail if you have received this e-mail by mistake and delete this e-mail from your system. E-mail transmission cannot be guaranteed to be secure or error-free as information could be intercepted, corrupted, lost, destroyed, arrive late or incomplete, or contain viruses. (Display Name) therefore does not accept liability for any errors or omissions in the contents of this message, which arise as a result of e-mail transmission. If verification is required please request a hard-copy version.

-----Original Message-----  
**From:** John Smith  
**Sent:** 03 August 2007 10:25  
**To:** Exclaimer Sales  
**Subject:** Exclaimer Mail Utilities

Dear Sir,

This is a message.

Yours sincerely

John Smith

## Formatting HTML, RTF and Plain Text email

You can choose to design HTML, RTF and Plain Text email messages differently, giving you more control over the look and style of every email type your organization sends.

You can do this using the {Only in HTML}, {Only in RTF} and {Only in Text} fields. These tags allow you to construct each individual type of email giving you full control over how it appears. If you don't use these fields Exclaimer Mail Utilities will auto-generate both the RTF and Plain Text elements of your email template based on the HTML version. In most cases this would be adequate, however, you may have strict corporate standards for the layout of your email. Our 'Only in...' fields is the easiest way to fully control the look of your HTML, RTF and Plain Text emails independently of each other.

### Hint

Using User Defined Fields (UDF) can be particularly useful as the building blocks of your email template. For example, you could use a UDF for laying out the email signature. This could then be edited from outside the main email template helping to guard against errors being introduced into the email template when all you want to do is simply amend the signature or disclaimer.

## Avoiding blank AD fields appearing in email messages

To avoid empty AD fields appearing in your Exclaimer Mail Utilities formatted email signature you must add an Exclaimer IF statement to the HTML source code where the field appears. For example, you want to include a mobile telephone number field in your organization's email messages from your AD users. Some of your AD users don't have a work mobile telephone number but you don't want the field to appear blank in the email message.

The solution:

In the WYSIWYG Disclaimer Editor -  
`{if({Mobile Number})} Mobile: {Mobile Number} {endif}`

This IF statement will remove the text ('Mobile:') and field value from the email message if the AD field Mobile is blank.

## Replacing blank AD fields with other fields in email messages

To avoid empty fields when you actually want fields to appear you can use an Exclaimer IF ELSE statement. For example, this will allow you to insert an alternative field if the one you are IF testing isn't present. If a mobile phone number field isn't present your alternative could be the office telephone number.

In the WYSIWYG editor -  
`{if({Mobile Number})} Mobile: {Mobile Number} {else} Tel: {Telephone} {endif}`

This statement will use the telephone text heading and field if the Mobile Number field is blank.

### More Useful Tips

You can find more top tips and other useful information in the Exclaimer Knowledge Base Forum at <http://forums.exclaimer.com/forums/21/ShowForum.aspx>.

For more information go to <http://www.exclaimer.com> or contact:

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