



## INT08: Creating HTML Email with FileMaker

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# Who am I?

- **Principal consultant for MightyData (Dallas, Austin, Houston and Denver)**
- **MightyData is FBA Platinum Member**
- **FileMaker 10 Authorized Trainer**
- **FileMaker 10 Certified Developer**
- **15+ years experience as software developer**
- **Specialize in systems integration projects (aka Tough Stuff)**

# What you will learn?

- **Three plug-ins to send HTML email**
- **Best practices for creating HTML email**
- **How to integrate FileMaker with email marketing service**

# Advantages of HTML Email



- **More compelling than plain text**
- **Creative design (fonts, colors, images)**
- **Two common uses:**
  - Send customer correspondence (invoice, status report)
  - Send marketing information to contacts (newsletter)

# Disadvantages of HTML Email



- **More difficult to create than plain text**
- **Does not display the same in different email programs**
- **Not supported natively in FileMaker**
- **If not managed properly, can lead to reports of abuse (spam)**

# Three Plug-ins to Send HTML Email



- **360Works Email** - [www.360works.com](http://www.360works.com)
- **SMTPit Pro** - [www.cnsplug-ins.com](http://www.cnsplug-ins.com)
- **Mail.it** - [www.dacons.net](http://www.dacons.net)
  
- **Two methods:**
  - Convert rich text in a field to HTML email
  - Send HTML code from a field as email

# 360Works Email Functions



1. **EmailConnectSMTP ( host ; username ; password )**
2. **EmailCreate ( from ; to ; subject )**
3. **EmailSetBody ( body ; contentType ) – plain or html**
4. **EmailSend**
5. **EmailDisconnect**

# SMTPit Functions



1. **SMTPit\_SetHost ( Host )**
2. **SMTPit\_SetAuthentication ( Type ; Username ; Password )**
3. **SMTPit\_SetFrom ( From )**
4. **SMTPit\_SetTo ( To )**
5. **SMTPit\_SetSubject ( Subject )**
6. **SMTPit\_SetBody ( Content ; Type ) – text or html**
7. **SMTPit\_Send**

# Mail.it Functions



1. **Emai\_SmtpAddMessageField ( fieldName ; fieldValue ) - To, From, Subject**
2. **Emai\_SmtpAddBody ( format ; content ) – text, rich or html**
3. **Emai\_Connect ( connectionType ; server ; userName ; password ; authType )**
4. **Emai\_SmtpSendMessage**
5. **Emai\_Disconnect ( connectionType )**

# Plug-in Demonstration



- **Let's see how each one works**

# Converting Rich Text to HTML



- **360Works – GetAsCSS ( text )**
  - Built-in FileMaker function
- **SMTPit - SMTPit\_StyledTextToHTML ( FieldName ; UseCSS )**
  - UseCSS parameter:
    - True – Use CSS
    - False – Use older <font> tags
- **Mail.it - Emai\_SmtpAddBody with "rich" type**

# Using Inline Images



- **Inline image is displayed in the body of message rather than separate as attachment**
- **Use cid:content\_id to place in HTML**
- **Each plug-in has different function to send inline images**
  - See plug-in documentation

# Sending Layout as Inline Image



- **Send layout as inline image**
- **SMTPit and Mail.it**
  - Send image of current layout
  - Send multi-page report (one image for each page)

# Layout as Inline Demonstration



- **Let's see how it works**

# Three Steps to HTML Email



- **Design – Graphic design and content**
- **Coding – HTML code**
- **Delivery – Sending email**
  
- **How it works – Send multi-part message that includes HTML and text versions of message**

# Design and Coding



- **Use design application (Fireworks)**
- **Use text editor (BBEdit or HomeStyle)**

**OR**

- **Use HTML email templates**
  - [www.mailchimp.com](http://www.mailchimp.com)
  - [www.campaignmonitor.com](http://www.campaignmonitor.com)

# Coding Challenges



- **Different email programs do not render HTML the same**
- **Many email programs block images by default**
- **Webmail services like Yahoo and Gmail strip several HTML tags**
- **Outlook switched from IE engine (2003) to Word engine (2007) to render HTML**

# HTML Coding Tips



- **Set width of email to 500-600 pixels**
  - Preview pane in some programs is 200-400 pixels wide
- **Use simple layouts and tables**
  - Lotus Notes can especially mangle tables
- **Use multiple tables rather than one complex table**
  - Minimize column spans
- **A simple two-column table with row across top**
  - Example: 2-column.html

# HTML Coding Tips (Cont.)



- **Use separate tables for header, body and footer**
- **Use large 100% wide table for background color**
  - Example: Table-wrap.html

# CSS Tips

- **Use CSS only for simple font formatting and color**
- **WYSIWYG programs insert incompatible CSS and <div> by default, Need to remove**
- **Use web tools to convert CSS to inline**
  - <http://www.campaignmonitor.com/blog/post/2406/huge-time-saver-automatic-inli/>
  - <http://code.dunae.ca/premailer.web/>

# Webmail Considerations



- **Popular webmail services: Yahoo, Gmail, Hotmail**
- **Strip out <html>, <head> and <body> tags**
- **Background colors in <body> are removed**
- **CSS placed in <head> (style sheet) will be lost**
  - Use inline CSS

# Important (Legal) Guidelines



- **Include link for one-click opt out**
- **Include link to view email in a browser**
- **Include physical mailing address and other contact info**
- **Don't forget to include plain-text version**
  - Spam filters penalize for sending HTML only

# HTML Email Delivery Tips



- **Host images on a web server (not attached)**
- **Throttle delivery – Send messages in small batches**
- **Use "email testing" service to check design in multiple email programs**
  - [www.campaignmonitor.com](http://www.campaignmonitor.com)
  - [www.mailchimp.com](http://www.mailchimp.com)
  - [www.litmusapp.com](http://www.litmusapp.com)
- **Fingerprint – Service to show what email programs your customers are using**
  - [www.fingerprintapp.com](http://www.fingerprintapp.com)

# Email Testing Service Demonstration



- **Let's see how it works**

# Delivery Challenges



- **Spam filters are very sensitive and have firewalls**
- **Spam laws require important rules**
- **Blacklist can block email from a specific server**

# HTML Email Resources



- **CampaignMonitor.com**

- Articles and Tips

- <http://www.campaignmonitor.com/resources/>

- Guide to CSS Support

- <http://www.campaignmonitor.com/css/>

- Free HTML Templates

- <http://www.campaignmonitor.com/templates/>

# HTML Email Resources (Cont.)



- **Free HTML Marketing Guide**

- [www.mailchimp.com/articles/email\\_marketing\\_guide](http://www.mailchimp.com/articles/email_marketing_guide)
- 64-page PDF
- Common Mistakes to Avoid (pages 23-25)
- Tactics for Avoiding Spam Filters (pages 30-31)
- Email Applications and Known Issues (pages 61-64)

# HTML Email Resources (Cont.)



- **MailChimp.com**

- Free HTML Email Designer  
<http://www.mailchimp.com/blog/free-html-email-designer-for-design-snobs/>
- How Spam Filters Think  
[http://www.mailchimp.com/articles/how\\_spam\\_filters\\_think/](http://www.mailchimp.com/articles/how_spam_filters_think/)
- How to Code HTML Email  
[http://www.mailchimp.com/articles/how\\_to\\_code\\_html\\_emails/](http://www.mailchimp.com/articles/how_to_code_html_emails/)
- Free Templates  
[http://www.mailchimp.com/resources/html\\_email\\_templates/](http://www.mailchimp.com/resources/html_email_templates/)

# HTML Email Resources (Cont.)



- Email Client Market Share Report  
<http://fingerprintapp.com/email-client-stats>
- Email Standards Project  
<http://www.email-standards.org/>
- Designer's Guide to HTML Email  
<http://www.sitepoint.com/article/designers-guide-html-email/>
- How to Code HTML Newsletters  
<http://www.sitepoint.com/article/code-html-email-newsletters/>
- Email Marketing Web Site  
<http://www.email-marketing-reports.com/>
- New O'Reilly Book  
<http://oreilly.com/catalog/9780980576863/>

# Using fmSpark to Send HTML Email



- **fmSpark - [www.seedcode.com](http://www.seedcode.com)**
  - Separates design from content
  - Includes HTML templates from Campaign Monitor
  - Can import HTML from web site as template
  - Converts rich text to HTML using custom function
- **Uses Mail.it plug-in**
- **Next version will include email throttling**

# fmSpark Demonstration



- **Let's see how it works**

# Integrating with Email Marketing Service



- **Email marketing services**
  - [www.constantcontact.com](http://www.constantcontact.com)
  - [www.campaignmonitor.com](http://www.campaignmonitor.com)
  - [www.mailchimp.com](http://www.mailchimp.com)
- **Use FileMaker to manage the contacts list**
- **Use email marketing service to send HTML email**
  - Provide templates
  - Maintain good reputation with major ISPs
  - Handle hard and soft bounces
  - Handle unsubscribes

# Integration Demonstration



- **Constant Contact using custom plug-in**
  - Prototype from 360Works
  - Contact 360Works.com if interested
- **Campaign Monitor using Web Services plug-in and WSDL**
  - Plug-in from FMNexus.com

# FileMaker Developer Conference 2009



**[www.filemaker.com/devcon/speaker\\_updates](http://www.filemaker.com/devcon/speaker_updates)**

**(This is also listed in your conference binder)**

This session WILL have updates.



**Please remember to fill out your  
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devcon/evaluations](http://www.filemaker.com/devcon/evaluations)**