Approved Email May 2025

TOC

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Approved Email Overview

Approved Email is functionality that exists between both Veeva CRM and Veeva Vault that uses reusable HTML content to compose emails that end users can send to accounts or other recipients.

Approved Email content is highly customizable, enabling customers to be in full control of the branding and presentation of emails. Since the content is hosted in Vault, it can be tested and approved as part of Vault's approval process, ensuring that content is correct and compliant before being made available to end users. These two core values result in compelling and compliant content that facilitates ongoing, personal conversations tailored to each recipient and situation.

Approved Emails can include hyperlinks and other actionable items. Each email interaction and its associated metrics, for example, opens, click-throughs, and content views, are captured in an account's history, dashboards, and exportable reports. Analyzing these activities enable content admins to monitor and adjust interactions to optimize each relationship.

The following additional functionality is available in Approved Emails:

- Send Approved Emails from a variety of entry points
- Utilize BCC in Approved Emails
- Include Key Messages in documents referenced by Approved Emails

With Approved Email, the following users are able to do the following tasks:

Content Creators

- **Creating Approved Email Content** – Using HTML, CSS, and a set of Veeva-provided tokens, content creators can create reusable, compelling, and compliant content for end users to send to recipients

Integration Users

- **Integrating Vault with CRM** – The integration user can customize the connection between CRM and Veeva Vault, including mapping fields between the two systems

Content Admins

- **Managing Approved Email Content** – Using Vault's approval process with CRM functionality, content admins can manage the readiness of Approved Email content and control which end users have access to the content. They can also test staged content in CRM using the same flow as an end user to ensure content functions correctly.
- **Tracking Approved Email Activity** – Content admins can track activity tied to an Approved Email, for example, opens, click-throughs, and content views, and use that information to optimize content

End Users

- **Sending Approved Emails** – End users can compose Approved Emails using pre-approved and compliant content. Depending on the content and organization, end users may also have the ability to customize content to best suit each relationship.

Creating Approved Email Templates

Approved Email templates are HTML files managed by Vault PromoMats. End users of Approved Email select templates as a starting point when composing an email to send to accounts. With the exception of certain Configuration Tokens, end users cannot edit templates within Veeva CRM, ensuring approved content remains unchanged when sent by end users to recipients.

> **Note:** At least one template is required for Approved Email to function. See the Vault PromoMats documentation for more information on uploading templates and image assets.

Templates can reference Vault-managed or external images and hyperlinks. When hyperlinks point to content in Vault, a specific syntax is used in the href. If a template references images using a relative path, for example <img src = ‘localdrive/imagename.gif’>, Vault PromoMats can load and deploy the images to a public web server so all email recipients can view the images. See the Approved Email Vault documentation for more information.

> **Warning:** Do not include tokens in commented out sections of Approved Email content.

> **Caution:** Do not sync email templates that do not contain HTML code.

Email Template Requirements and Examples

Templates must contain a minimum structure of a standard HTML document, plus an <table> tag containing only the {{insertEmailFragments}} token when using Email Fragments. Templates must be UTF-8 encoded and should adhere to the following guidelines:

- All comment tags must be preceded with a space or other form of indentation
- Use <table> (and nested <table> tags) for absolute placement. Do not rely on <div>.
- Do not link to external CSS style sheets. CSS should be inline in the head using the <style> tag or inline in the <body> HTML.
- Only a subset of CSS functionality are supported in many email clients

  > **Note:** Up to 40 percent of all emails are opened on mobile devices. Email templates should be created with a mobile experience in mind. This typically follows responsive design process where the CSS adapts to render on both desktop and mobile email clients.

- Images should be formatted for screen resolution and be as small as possible

  > **Note:** Images hosted in Vault cannot be used in CSS for Approved Email templates. Approved Email only supports the use of relative paths in HTML.

- Hyperlinks containing non-ASCII characters, for example accented characters, must be converted to ASCII via Punycode or a similar tool. Hyperlinks that contain non-ASCII characters do not function correctly when sent to recipients.

> **Caution:** Email Template HTML files cannot have more than 131,072 characters.

No standard exists for creating HTML for emails as each email client supports a different subset of CSS. See Resources for Creating Approved Email Content on page 37 for a list of useful sites and resources to use when creating templates.

Example Email Template Structure

```
<html>
```

```
  <head>
    <meta http-equiv="Content-Type" content="text/html; charset=utf-8">
    <title>My Title</title>
    <style type="text/css"><!-- Inline CSS styles--></style>
  </head>
  <body>
    <!-- Content goes here. Styles can also be inline. -->
    <table>
      <!-- Required if using fragments. Table must be empty and include the
following token -->
      {{insertEmailFragments}}
    </table>
  </body>
</html>
```

Using the Email Template Editor

Users can quickly create, manage, and update responsive HTML files for Email Template documents within Vault using MailUp's BEE email editor.

See Using the BEE Email Template Editor in the Vault documentation for more information.

Uploading Templates to Vault

Once templates have been coded and locally tested, it must be uploaded to Vault. See How to Set up Email Templates in the Vault documentation for more information.

> **Caution:** Ensure a template's assigned country has a corresponding abbreviation in Vault. If an assigned country does not have an associated abbreviation, a sync error occurs when syncing media from Vault to CRM.

Creating Approved Email Fragments

Approved Email fragments are HTML files managed by Vault PromoMats. End users can select one or more fragments to add to an email, enabling greater flexibility and end user customization when composing emails.

Fragments display in the email in the order they are arranged by the end user.

Email Fragment Requirements and Examples

Fragments insert in the template at the position of the {{insertEmailFragments}} token. Since this token should be enclosed in a <table> tag, fragments must be enclosed in a <tr> tag to ensure they render correctly. Fragments can contain images and relationships to multiple Vault documents or any number of external href links.

> **Warning:** Do not include tokens in commented out sections of Approved Email content.

> **Note:** Fragments can be shared between different Email Templates of the same product, so the HTML design should be consistent.

Example Email Fragment Structure

```
<tr>
  <td>
    <!-- Content goes here. Styles can be inline or can reference the <styles> tag of the template -->
    <!-- Images are stored externally or in Vault -->
    <a href="{{PieceLink}}">Creates a link to a Related Piece Vault document</a>
    <a href="{{ISILink}}">Creates a link to an Important Safety Information Vault document</a>
  </td>
</tr>
```

Linking a Vault Documents in a Fragment

Admins can quickly and safely link a Vault PromoMats document in a fragment using the following tag:

This text displays as the link

When the end user includes a fragment with a link to a Vault document and selects Send, Approved Email validates that the corresponding document is in a Steady State. if the email contains any links to a Vault document that is not in a Steady State, the email is not sent. This ensures only approved and compliant content is sent by end users.

```
<tr>
  <td>
    <table>
      <tr>
        <td>
          <!-- Content goes here. Styles can be inline or can reference the <styles> tag of the template -->
          <!-- Images are stored externally or in Vault -->
          <a href="{{$20}}">Creates a link to the Vault document with an ID of 20.</a>
          <a href="{{$87}}">Creates a link to the Vault document with an ID of 87.</a>
        </td>
      </tr>
    </table>
  </td>
</tr>
```

Uploading Fragments in Vault

Once the fragment has been coded and locally tested, it must be uploaded to Vault. See How to Set up Email Fragments in the Vault documentation for more information.

Creating Content for Email Builder

Browser|

Content used in the Email Builder grids is managed in PromoMats or Medcomms.

Email Builder functionality consists of a CRM Email Module defining the content in the Email Builder grid, and an associated template to render the grid. Content creators define what text is available for each of the blocks of text, and can optionally add combination rules to define dependencies between the blocks. This allows content creators to create one email builder per theme instead of maintaining multiple email templates.

> **Note:** The combination rules defined in Promomats or Medcoms must include at least one cell from each of the available Email Builder grid columns.

The Approved Email process syncs the content to Veeva CRM so end users can select templates associated with an Email Builder grid to easily compose approved emails.

For detailed instructions on creating Email Builder content modules and associating them with templates, see the PromoMats documentation.

> **Note:** The {{insertEmailBuilder}} token is not supported in Template Fragments or Email Fragments.

Related Topics

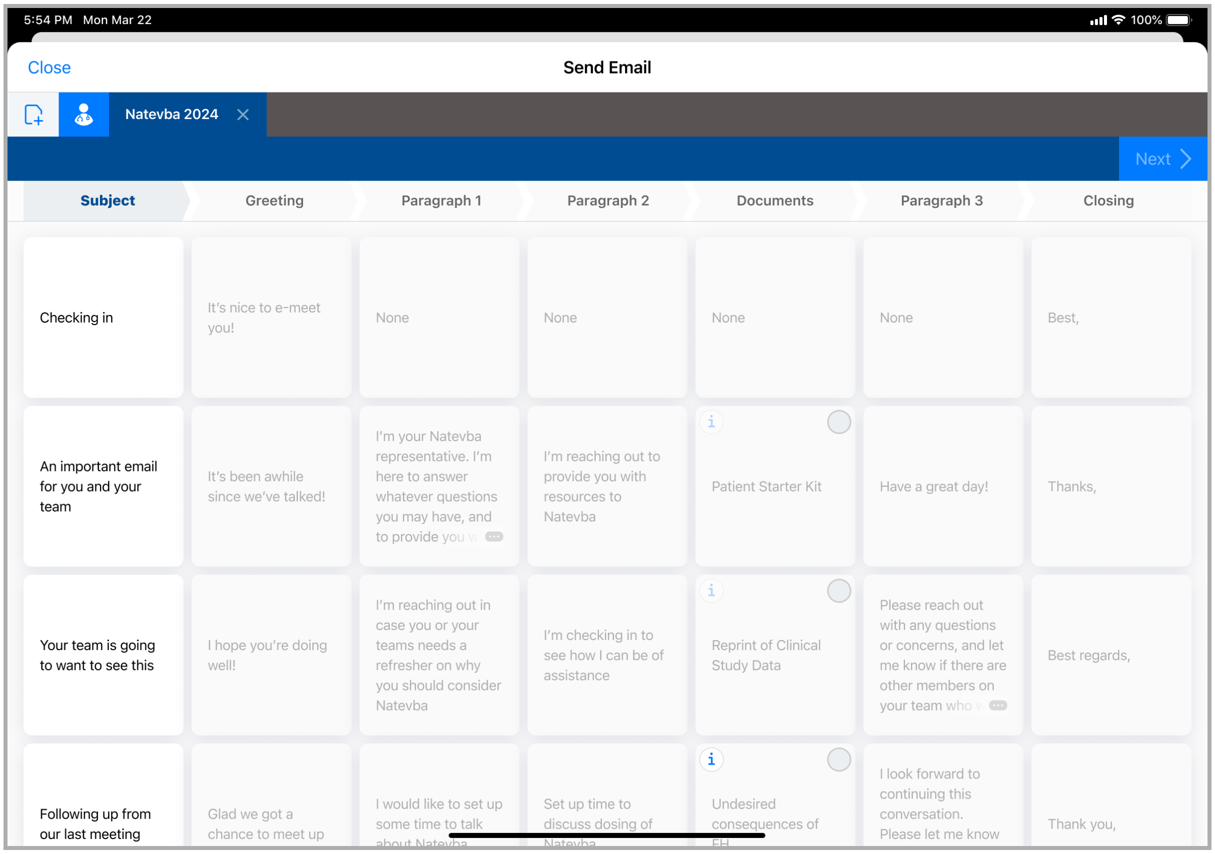
- Email Builder below
- Approved Email Overview on page 7
- Creating and Managing Approved Email Content

Email Builder

iPad|

Email Builder is a new way to compose emails that provides end users a guided experience when creating Approved Emails. Email Builder grids are associated with templates allowing users to select from approved blocks of text for the subject, greetings, paragraphs, and documents sections of the email.

Email Builder content is managed in Promomats or Medcomms, similar to other Approved Email content. For more information, see Creating Content for Email Builder on the previous page.



Configuring Email Builder

Email Builder requires configuration in both Vault and Veeva CRM.

Configuring Email Builder in Vault

View the PromoMats / MedComms documentation for instructions on configuring Email Builder in Vault.

Configuring Email Builder in Veeva CRM

To configure Email Builder:

1. Ensure Approved Email is configured.
2. Grant Integration users the following permissions:

Object	OLS	Record Types	Fields	FLS
Approved_Document_vod	CRU	n/a	• Email_Builder_vod • Is_Email_Builder_vod	Edit
Email_Builder_vod	CRU	Email_Builder_vod	• Vault_GUID_vod • Vault_DNS_vod • Vault_External_Id_vod • Vault_Record_Id_vod • Status_vod	Edit

Object	OLS	Record Types	Fields	FLS
Email_Builder_Cell_vod	CRU	Email_Builder_Cell_vod	• Display_Order_vod • Email_Builder_vod • Hash_vod • Type_vod • Text_vod • Key_vod • Approved_Document_vod • Vault_GUID_vod • Vault_External_Id_vod • Vault_Record_Id_vod • Status_vod	Edit

Object	OLS	Record Types	Fields	FLS
Email_Builder_Rule_vod	CRU	Email_Builder_Rule_vod	• Description_vod • Email_Builder_vod • Type_vod • Vault_External_Id_vod • Vault_GUID_vod • Vault_Record_Id_vod • Status_vod	Edit
Email_Builder_Rule_Cell_vod	CRU	Email_Builder_Rule_Cell_vod	• Email_Builder_vod • Email_Builder_Rule_vod • Email_Builder_Cell_vod • Vault_External_Id_vod • Vault_GUID_vod • Vault_Record_Id_vod • Status_vod	Edit

Object	OLS	Record Types	Fields	FLS
Sent_Email_Builder_Cell_vod	CRU	Sent_Email_Builder_Cell_vod	• Sent_Email_vod • Email_Builder_Cell_vod • Approved_Document_vod • Inserted_Order_vod	Edit
Sent_Email_vod	CRU	n/a	• Email_Builder_vod • Email_Builder_Rule_vod • Email_Builder_Values_vod	Edit

3. Grant End users the following permissions:

Object	OLS	Record Types	Fields	FLS
Approved_Document_vod	R	n/a	• Email_Builder_vod • Is_Email_Builder_vod	Read

Object	OLS	Record Types	Fields	FLS
Email_Builder_vod	R	Email_Builder_vod	• Vault_GUID_vod • Vault_DNS_vod • Vault_External_Id_vod • Vault_Record_Id_vod • Status_vod	Read

Object	OLS	Record Types	Fields	FLS
Email_Builder_Cell_vod	R	Email_Builder_Cell_vod	• Display_Order_vod • Email_Builder_vod • Hash_vod • Type_vod • Text_vod • Key_vod • Approved_Document_vod • Vault_GUID_vod • Vault_External_Id_vod • Vault_Record_Id_vod • Status_vod	Read

Object	OLS	Record Types	Fields	FLS
Email_Builder_Rule_vod	R	Email_Builder_Rule_vod	• Description_vod • Email_Builder_vod • Type_vod • Vault_External_Id_vod • Vault_GUID_vod • Vault_Record_Id_vod • Status_vod	Read
Email_Builder_Rule_Cell_vod	R	Email_Builder_Rule_Cell_vod	• Email_Builder_vod • Email_Builder_Rule_vod • Email_Builder_Cell_vod • Vault_External_Id_vod • Vault_GUID_vod • Vault_Record_Id_vod • Status_vod	Read

Object	OLS	Record Types	Fields	FLS
Sent_Email_Builder_Cell_vod	R	Sent_Email_Builder_Cell_vod	• Sent_Email_vod • Email_Builder_Cell_vod • Approved_Document_vod • Inserted_Order_vod	Read
Sent_Email_vod	RU	n/a	• Email_Builder_vod • Email_Builder_Rule_vod • Email_Builder_Values_vod	Edit

4. Update the mapping from the Approved Email Administration page. To do so:
   a. Select **View Map** for the appropriate Vault connection in the Vault Connection Management section.
   b. Select **Compare CRM to Vault**.
5. Enable the following VMOCs for the correct profiles:
   - Email_Builder_vod
     - WHERE Id in (SELECT Email_Builder_vod__c FROM Approved_Document_vod__c)
   - Email_Builder_Rule_vod
   - Email_Builder_Cell_vod

- Email_Builder_Rule_Cell_vod
- Sent_Email_Builder_Cell_vod

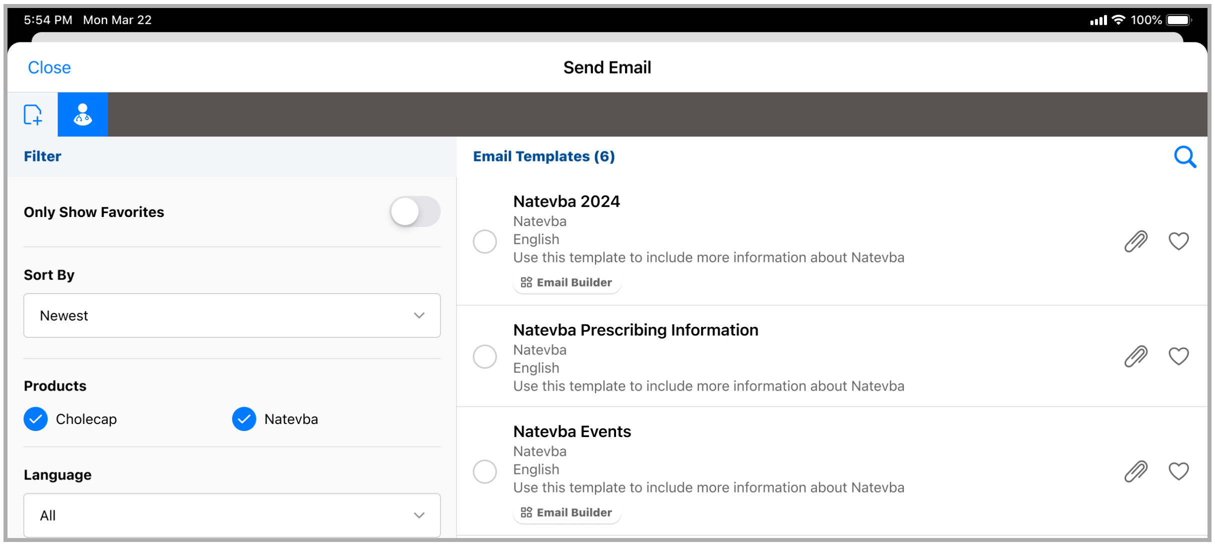
Building Emails

Email templates with Email Builder capability can be accessed from all entry points except Events Management, Recommended Emails, and Suggestions. A label displays to indicate email templates with Email Builder capability.

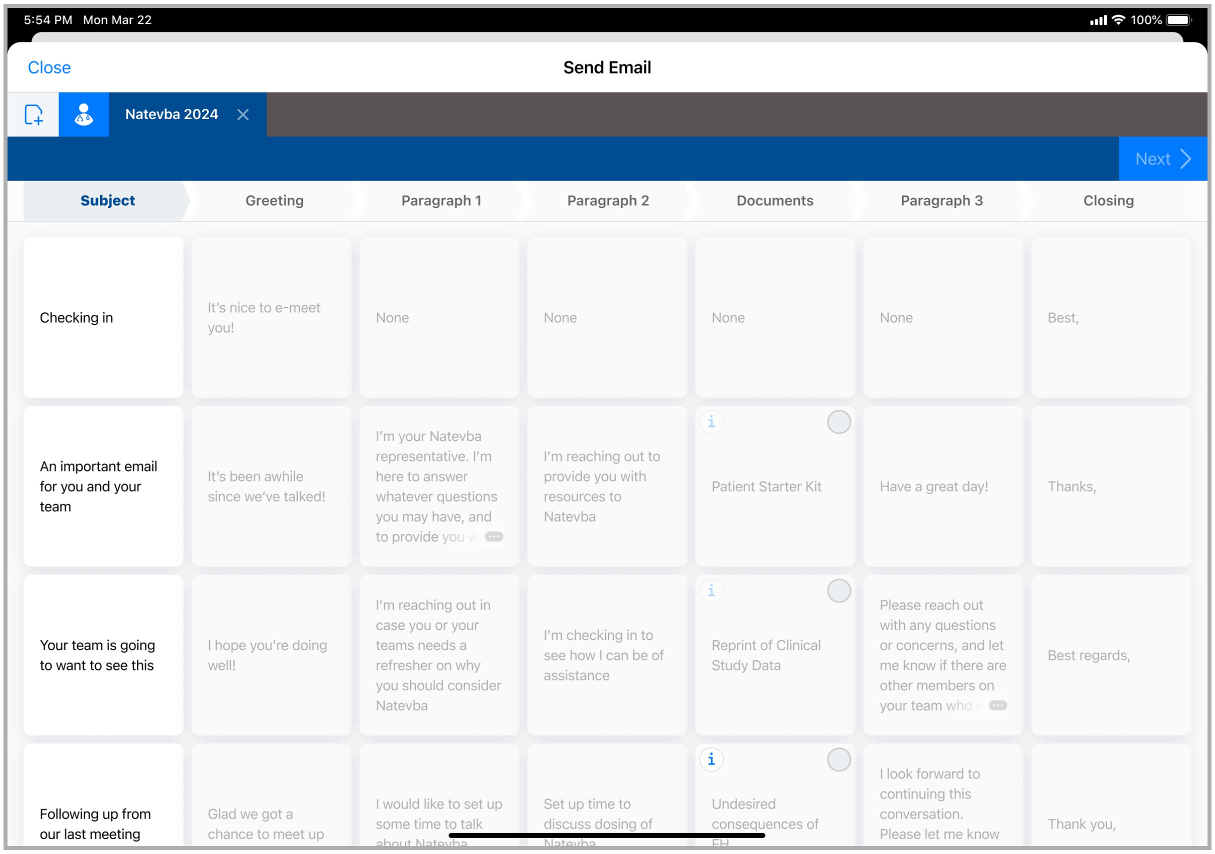
> **Note:** Email Builder does not support multiple products. Content creators cannot associate multiple products with Email Templates containing lookups to the Email Builder, or with Email Fragments that are looked up by the Email Builder Cells.

To create an email using a builder:

1. Select an email template that includes an email builder.

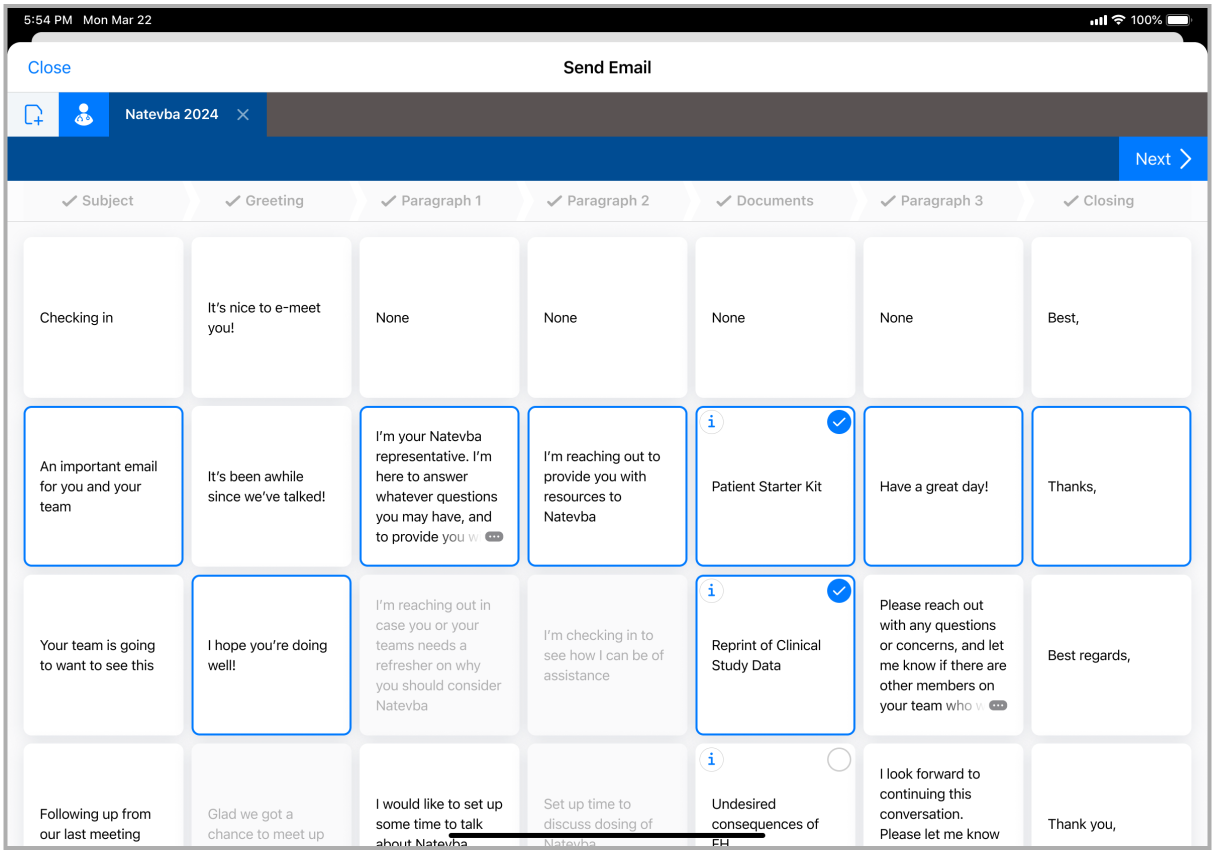


2. Select a single content cell from the first available column. This enables the cells in the next column.

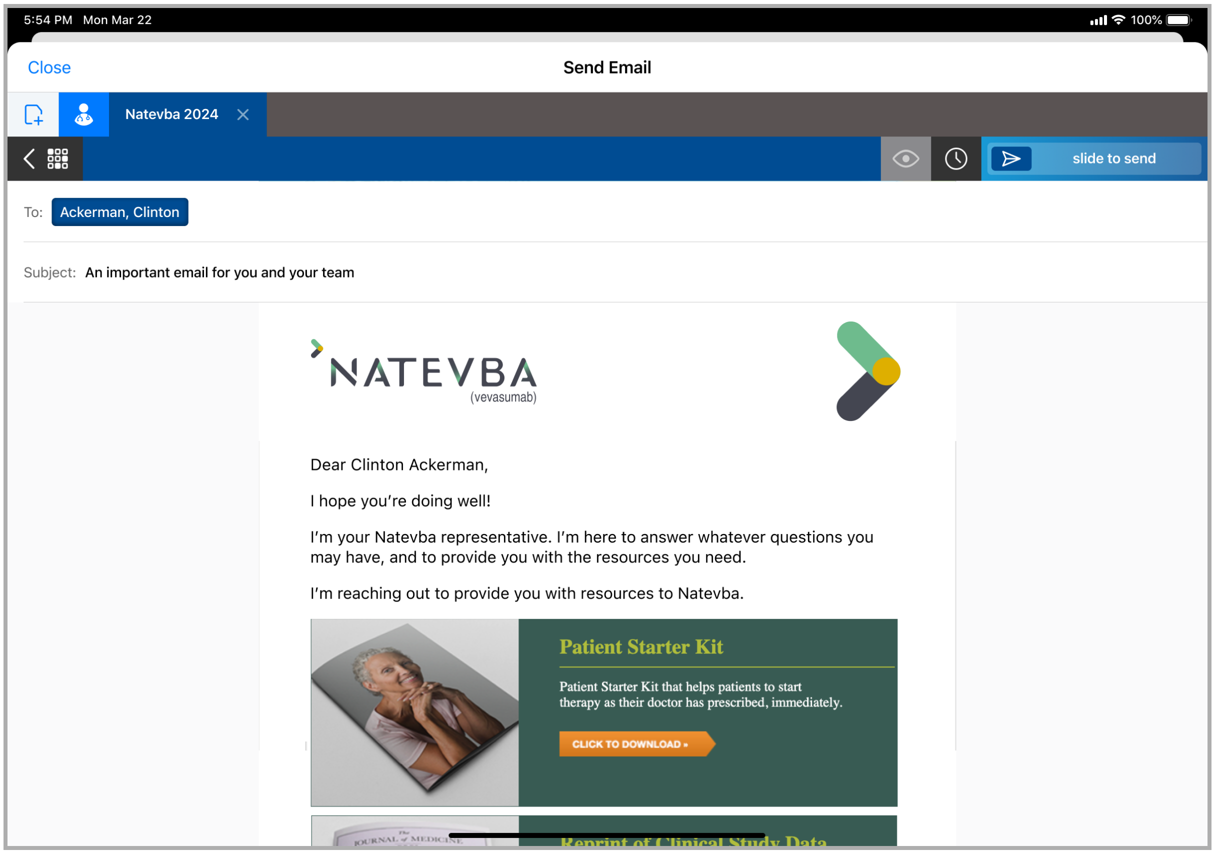


3. Select one cell from each of the remaining columns. With each selection, the next column is enabled.

   The Documents column allows users to select one or more fragments to add to the Documents section of the message. Users can select more than one document cell from the available options.



4. Select **Next** to view the entire message in the editor. If changes are needed, users can select Back from the editor to return to the Email Builder grid and make changes to the content selections.



5. Send or schedule the email, or select **Close** to save a draft, if draft functionality is enabled.

   All content selections are saved in the draft. The email can be accessed via the Drafts folder on the Email Tab. Accessing the draft displays the Email Builder.

The Approved Email process verifies the Email Builder template, and the fragments associated with its document cells, have a status that allows them to be sent:

- If the sender is an Approved Email admin, the process verifies the Email Builder and associated records referenced in the Sent Email have Status_vod = Approved_vod or Staged_vod
- If the sender is an end user, the process verifies the Email Builder and associated records referenced in the Sent Email have Status_vod = Approved_vod

If any of the checks do not pass, the process does not send the email, the status is set to Failed, and one of the following messages displays to the user:

Cause	Message
The Email Builder is no longer valid	Email Builder is no longer valid, please sync your device and retry.
Email Builder Cells are no longer valid	Email Builder Cell {SalesforceId} is no longer valid, please sync your device and retry

Related Topics

- Creating Content for Email Builder on page 13
- Approved Email Overview on page 7

- Creating and Managing Approved Email Content

Multi-Product Approved Email Content

iPad|Browser|

Content creators can avoid duplicating Approved Email content in Vault by assigning multiple products to Email Templates and Email Fragments. Multi-product content then generates in CRM as one Approved_Document_vod record per assigned product. This results in a more streamlined content library that is easier to maintain.

Each Approved_Document_vod record in CRM associates with only one product, determined by the Product_vod field. For example, if one Email Fragment is assigned to five products in Vault, five Approved_Document_vod records are created in CRM, one for each product.

For example, Christine Roberts is a content creator at Verteo BioPharma responsible for three products: Cholecap, Restolar, and Labrinone. She creates a single email fragment that can be used with all three products. After the email fragment is approved and pushed to CRM, three new Approved Documents are created, one for each product, available to all end users assigned to any of the three products.

Prerequisites

- Vault Metadata Sync

Considerations

- The sync ignores any Vault products assigned to Approved Email content when CRM Products and/or CRM Product Groups are added. Only content with multiple CRM Products and/or CRM Product Groups are copied in CRM.
- The sync ignores any CRM Detail Groups assigned to Approved Email content when CRM Product Groups are added
- This feature uses the following Vault document fields:
  - CRM Products
  - CRM Product Groups – Represents a pairing of a CRM Product and a CRM Detail Group
- The crm_detail_group__v field can still be used in single-product content
- MyInsights content referencing the Vault_Document_ID_vod field on the Approved_Document_vod object may return multiple records due to duplicate Vault_Document_ID_vod values. Developers should test and make all appropriate updates to these visualizations after this feature is enabled.
- Events Management Email Templates do not support multi-product content
- Multi-product Approved Email Key Messages are not supported

Configuring

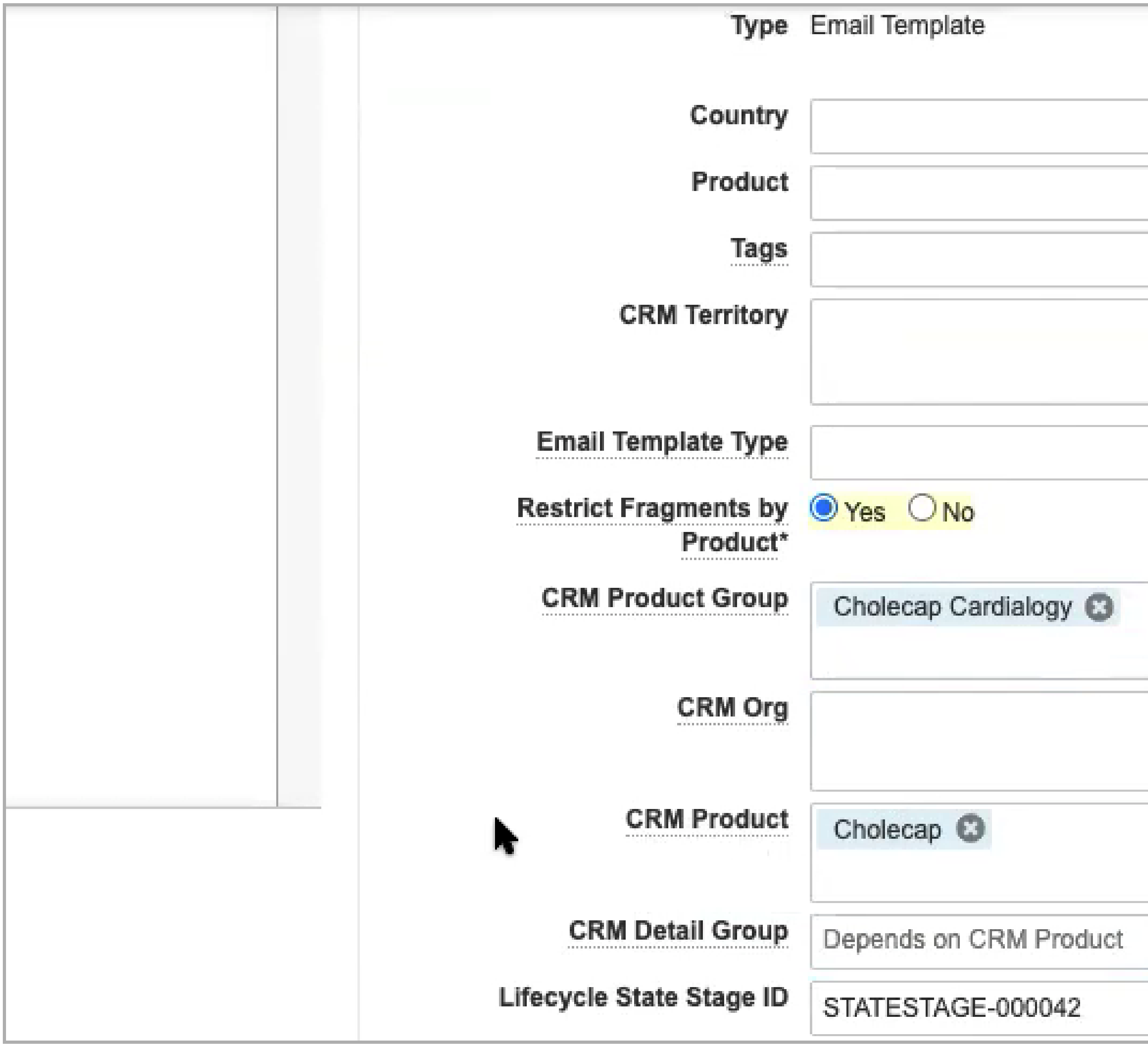
To configure this feature, in the connected Vault instance:

1. Edit the following fields to be multi-select picklists:
   - crm_product__v
   - crm_product_group__v
2. Grant integration users read access to the following fields:
   - crm_product__v
   - crm_product_group__v
3. Add the following fields to the Email Template and Email Fragment Document Types:
   - crm_product__v
   - crm_product_group__v

Assigning Multiple Products to Content

CRM Products and CRM Product Groups can be added to Approved Email content via the corresponding picklist on the appropriate Document record in Vault:

1. Navigate to the appropriate Document record in Vault.
2. Select **Edit**.
3. Populate the appropriate picklists:
   - crm_product__v
   - crm_product_group__v – Represents a pairing of a CRM Product and a CRM Detail
4. Select **Save**.



An Approved_Document_vod record is added in CRM for each added CRM Product or CRM Product Group during the next sync.

If a CRM Product or CRM Product Group is deselected from the picklist on the Document, the corresponding Approved_Document_vod record in CRM automatically expires during the next sync.

Note: When migrating content from single-product to multi-product, content creators should be aware of how the picklists interact using the examples in the below section.

Interaction of the Picklists

The picklists interact to determine the values of the Product_vod and Detail_Group_vod fields of the resulting Approved_Document_vod records in CRM.

Use the crm_product_group__v multi-select picklist to designate product-detail group pairs. Optionally, use the crm_product__v picklist to create records in CRM unaffiliated with a detail group.

The following table represents example field inputs in Vault and the values of the subsequent records generated in CRM:

Input (Vault)		Output (CRM)		
crm_product__v	crm_product_group__v	Document 1	Document 2	Document 3
n/a	• Cholecap Cardiology • Restolar Cardiology • Labrinone Cardiology	• Product_vod = Cholecap • Detail_Group_vod = Cardiology	• Product_vod = Restolar • Detail_Group_vod = Cardiology	• Product_vod = Labrinone • Detail_Group_vod = Cardiology
• Cholecap • Restolar	n/a	• Product_vod = Cholecap • Detail_Group_vod = blank	• Product_vod = Restolar • Detail_Group_vod = blank	n/a

Input (Vault)		Output (CRM)		
crm_product__v	crm_product_group__v	Document 1	Document 2	Document 3
• Cholecap • Restolar	Cholecap Cardiology	• Product_vod = Cholecap • Detail_Group_vod = blank	• Product_vod = Cholecap • Detail_Group_vod = Cardiology	• Product_vod = Restolar • Detail_Group_vod = blank

Using Multi-Product Content from CLM Presentations

The getApprovedDocument() method in the CLM library references the Vault_Document_ID_vod field to select the appropriate Approved_Document_vod record. With Multi-Product support enabled, multiple Approved_Document_vod records can have identical Vault_Document_ID_vod fields.

> **Note:** Multi-product support for this method requires a JS Library and app version of at least 212.0.100.

When this occurs, the following logic is used to select an individual Approved_Document_vod record when the method is called:

- If the user does not have FLS read permission to the Product_vod and Detail_Group_vod fields on the Key_Message_vod object, an error displays
- If an Approved Document matches the Product_vod and Detail_Group_vod (if populated) fields on the current Key Message, that Approved Document is used
- If an Approved Document does not match any of these fields, the first Approved Document record available for the given Vault_Document_ID_vod sorted by SalesforceID is used

Using Multi-Product Content with Suggestions

When sending an email from a Suggestion, the Email_Template_ID_vod field on the Suggestion_vod record returns multiple Approved Documents, the following logic is used against the first available Suggestion_Tag_vod record to determine which Approved Document loads:

- If an Approved Document matches the Product_vod field of the first Suggestion Tag, that document is used
- If the first Suggestion Tag does not have a Product_vod field that matches any of the returned Approved Documents, the next Suggestion Tag is tried instead for matching
- If no Suggestion Tags have a Product_vod field that matches any of the returned Approved Documents, the Send Email page displays with no templates or filters preloaded

Labeling Links in Approved Email

When a recipient of an Approved Email selects a link within the email, that activity is tracked. Depending on the level of complexity of the link, this activity may be difficult to identify by users viewing Approved Email activity. To make these links more easily identifiable, content creators can label links within templates and fragments, making it easier to analyze link activity in Approved Email.

To add a label to a link within a template or fragment, append the **LinkName** parameter to the link URL. This parameter is parsed out of the email when sent and does not display to recipients.

For example, the content creator adds the following link to an Approved Email fragment:

Click Here!

When Dr. Clinton Ackerman receives an email containing this fragment, the link renders to him as

Click Here!

When he selects the link, email activity is tracked and associates with an Email_Activity_vod record with the following field values:

- Link_Name_vod - MyLinkName
- Click_URL_vod - https://www.veeva.com

When generating links from a token, for example using the {{approvedEmailAction}} token, the format is:

Using and Embedding the Vault Viewer in Approved Email Content

There are two ways to display Vault content to a recipient of an Approved Email:

- Standalone Vault Viewer – The default document viewer that email recipients use to view Vault documents
- Embedded Viewer – Content creators can embed the Vault document viewer in a custom portal site, enabling customers to retain control of branding and augment the document with additional portal content. The embedded viewer is built using a small HTML snippet that renders the document within its own iFrame.

Adding the Embedded Vault Viewer to a Web Page

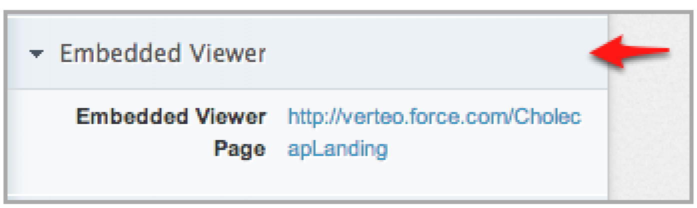
To use the Embedded Viewer in a customer portal page, add the following HTML snippet to the appropriate page. The viewer can be embedded in multiple pages.

```
<div align="center" id="viewer"></div>
<!-- The iFrame and Vault Viewer replaces the above <div> tag. The id of the <div> matches the first parameter of the viewer constructor. -->
<script>
  var tag = document.createElement('script');
  tag.src = "https://js.veevavault.com/vault.js";
  var firstScriptTag = document.getElementsByTagName('script')[0];
  firstScriptTag.parentNode.insertBefore(tag, firstScriptTag);
  // This function creates an <iframe> (and vault viewer) after the API code downloads.
  var viewer;
  function onVeevaVaultIframeAPIReady() {
    viewer = new VV.Viewer('viewer', {
      height: '630',
      width: '712',
      error: 'Sorry. The document you are trying to view is not available.'
    });
  }
</script>
```

The above snippet creates an iFrame whose size can be defined in pixels using the height and width parameters. An optional error message can be defined inline using the error parameter. This displays when the target is no longer in an approved or steady state in Vault.

Linking to Pages with the Embedded Vault Viewer

When the link to a page with the embedded Vault viewer is added to a template or fragment, the URL is stored in the Document_Host_vod field on the corresponding Approved_Document_vod record.



Viewing Multiple Documents in the Vault Viewer

The Vault Viewer enables users to access all documents referenced by the Approved Documents (Email Template and Email Fragments) in Vault without returning to the email to select each one individually.

When the recipient selects one of the documents included in an email, the Multi-Doc View in Vault displays the document along with a thumbnail of each of the documents included in the email. The recipient can then select and view each of the documents from within the Vault Viewer.

Thumbnails only display for valid, non-expired documents. If a document expires after the email is sent, but before the recipient accesses it, a thumbnail does not display for that document.

Resources for Creating Approved Email Content

The following resources are helpful when using Approved Email:

- Starter pack for BEE Templates
- Litmus test your email designs on all email clients, and spam filter testing
- Campaign Monitor list of CSS support for all major email clients
- Campaign Monitor Guidelines for HTML Formatting
- Zurb guide to responsive design and examples
- Mailchimp guide to responsive email design
- Starter pack for Master Email Fragments
- Starter pack for Meeting Invite Templates

Approved Email Configuration Tokens

Approved Email tokens are used for personalization by customers and for limited personalization by users. Personalization values are pulled from the Account and User objects and allow emails to contain personalized content. Configuration tokens enable specific behavior prior to an email being sent.

Warning: Do not include tokens in commented out sections of Approved Email content.

Caution: All tokens are case sensitive.

Approved Email Tokens fall into one of the following categories:

- Inserting Email Fragments and Template Fragments
- Content Tokens
  - Standard Tokens
  - Object Reference Tokens
  - Sent Email Related Tokens
- Functionality Tokens
- Vault Tokens
- User Input Tokens
  - Text Tokens
  - Picklist Tokens
- Signature Transaction Receipt Tokens
- Consent Capture Tokens
- Unsubscribe Tokens
  - Unsubscribe Link Tokens
  - Unsubscribe Page Tokens
- Website Tokens

Tokens that can be used in Email Fragments can also be used in Master Email Fragments.

Note: Tokens in Email Fragments and Template Fragments are not supported on the Windows Tablet platform.

Note: Do not use multiple lines when adding tokens to the Subject Field.

Caution: Do not use Approved Email tokens in unsupported entry points or content types. This may result in unexpected behavior.

Inserting Email Fragments and Template Fragments

Token	Description	Supported Entry Points	Works In
{{insertEmailFragments}}	Defines where fragments are inserted in templates. This token must be inserted in an empty <table> tag in the Email Template. **Caution:** Do not insert multiple {{insertEmailFragments}} tokens into the same Email Template. See Creating Approved Email Templates for more information about template requirements.	All except Receipts and Double Opt In	• Email Templates

Token	Description	Supported Entry Points	Works In
{{insertEmailFragments[Minimum,Maximum]}}	Defines the minimum and maximum number of fragments end users can add to a template. For example, {{insertEmailFragments[2,4]}} requires end users to select between two and four fragments to add to the email. **Caution:** Do not insert multiple {{insertEmailFragments[Minimum,Maximum]}} tokens into the same Email Template.	All except Receipts and Double Opt In	• Email Templates
{{emailTemplateFragment}}	Inserts an HTML snippet that is managed by the Vault Email Template Fragment document type. Typically used to append a standard disclaimer or ISI to the end of the selected template.	All	• Email Templates • Email Builder Templates

Token	Description	Supported Entry Points	Works In
{{insertEmailBuilder}}	Defines the section in an Email Template where Email Builder Cells are inserted. This token must be inserted in an empty <table> </table> tag in the Email Template.	All except Events Management, Receipts, and Double Opt-In	• Email Templates • Email Builder Templates

Content Tokens

Content tokens are tokens that add specific content or add links to related content.

> **Note:** Select tokens with blue names to play an instructional video on the token.

> **Caution:** Tokens in Email Fragment URLs are not accessible in Preview mode.

Standard Tokens

Token	Description	Supported Entry Points	Works In
{{accTitle}}	Inserts Account salutation	All	• Email Templates • Email Fragments • Template Fragments • Subject Field • Email Builder Templates • Email Builder Cells

Token	Description	Supported Entry Points	Works In
{{accFname}}	Inserts Account first name	All	• Email Templates • Email Fragments • Template Fragments • Subject Field • Email Builder Templates • Email Builder Cells
{{accLname}}	Inserts Account last name	All	• Email Templates • Email Fragments • Template Fragments • Subject Field • Email Builder Templates • Email Builder Cells

Token	Description	Supported Entry Points	Works In
{{accCredentials}}	Inserts Account credentials from Account.Credentials_vod	All	• Email Templates • Email Fragments • Template Fragments • Subject Field • Email Builder Templates • Email Builder Cells
{{userEmailAddress}}	Inserts the end user's email address from the Email field on the User object. This token is typically used in the from or reply-to fields of an outbound email template.	All	• Email Templates • Email Fragments • Template Fragments • Subject Field • Email Builder Templates • Email Builder Cells

Token	Description	Supported Entry Points	Works In
{{userName}}	Inserts the end user's name.	All	- Email Templates - Email Fragments - Template Fragments - Subject Field - Email Builder Templates - Email Builder Cells
{{userPhoto}}	Photo of user stored in the User_Detail_vod object. End users can view and edit their photo from the My Profile tab. Uploaded photos will be resized to 160x120 pixels. To preserve clarity, resize the photo to 160x120 pixels prior to uploading the photo. See Personalizing User Profiles for more information.	All	- Email Templates - Email Fragments - Template Fragments - Email Builder Templates

Token	Description	Supported Entry Points	Works In
{{parentCallDatetime}}	Inserts the date and time of the associated Parent Call, ensuring this information is correct when the email is sent. **Note:** This token does not include the timezone. Use the {{timeZone}} token to insert the timezone. When an email template has the token {{parentCallDatetime}}, it will be replaced by the: • Value stored in the Call2_vod.Call_Datetime_vod, if neither Call2_vod.Parent_Call_vod nor Call2_vod.Parent_Call_Mobile_ID_vod is populated • Value stored in Call2_vod.Parent_Call_vod__	• Call • Remote Meeting	• Email Templates • Email Fragments • Template Fragments • Subject Field • Email Builder Subject • Email Builder Templates • Email Builder Cells

Token	Description	Supported Entry Points	Works In
	r.Call_Datetime_vod, if Call2_vod.Parent_Call_vod is populated • Value stored in Call2_vod.Call_Dateime_vod of the Call2_vod record, where the Parent Call2_vod.Mobile_ID_vod = Child Call2_vod.Parent_Call_Mobile_ID_vod		
{{parentCallDatetime(FORMAT)}}	Creators can additionally specify the displayed format of the date or time. See Formatting Tokens to Display Date and Time on page 121 for more information.	• Call • Remote Meeting	• Email Templates • Email Fragments • Template Fragments • Email Builder Subject • Email Builder Templates • Email Builder Cells

Token	Description	Supported Entry Points	Works In
{{timeZone}}	For iPad end users, this token displays the value of the time zone of the device. The format is based on the user's Salesforce locale. For Online end users, this token displays the value of the TimeZoneSidKey field on the User record and displays with the format: GMT +/- X hours.	All	• Email Templates • Email Fragments • Template Fragments • Subject Field • Email Builder Subject • Email Builder Templates • Email Builder Cells

Object Reference Tokens

Token	Description	Supported Entry Points	Works In
{{ObjectAPIName.FieldAPIName}}	Content creators can use this token to directly reference any field of a supported field type on the following objects: - Account - Approved_Document_vod **Caution:** Referencing the Approved_	All	- Email Templates - Email Fragments - Template Fragments - Subject Field - Email

Token	Description	Supported Entry Points	Works In
	Document_vod object is only supported in Email Templates. • Call2_vod • User • User_Detail_vod The following field types are supported: • Check		Builder Subject • Email Builder Templates • Email Builder Cells

Token	Description	Supported Entry Points	Works In
	box • Currency • Date • Date/Time • Email • Formula* **Note:** Formula field values are not updated automatically on iPad,		

Token	Description	Supported Entry Points	Works In
	so an email may contain an outdated formula field value if the user changed a value used by the formula field but		

Token	Description	Supported Entry Points	Works In
	 • Number • Percent • Phone • Picklist • Roll-Up Summary* **Note:** Only available on the Account object **Note:** Roll-		

Token	Description	Supported Entry Points	Works In
	up field values are not updated automatically on iPad, so an email may contain an outdated roll-up field value		

Token	Description	Supported Entry Points	Works In
	e user changed a value used by the roll-up field but had not yet synced. • Text • Text Area Examples: • {{Account.Formatted_Name_vod__c}}		

Token	Description	Supported Entry Points	Works In
	• {{Approved_Document_vod__c.Language_vod__c}} • {{User.Phone}}		

Token	Description	Supported Entry Points	Works In
{{ObjectAPIName.FieldAPIName(FORMAT)}}	If the referenced field is a Date or a Date/Time type field, creators can additionally specify the displayed format of the date or time. See Formatting Tokens to Display Date and Time on page 121 for more information.	All	• Email Templates • Email Fragments • Template Fragments • Email Builder Subject

Token	Description	Supported Entry Points	Works In
			• Email Builder Templates • Email Builder Cells

Token	Description	Supported Entry Points	Works In
{{ObjectAPIName.RelationshipName.FieldAPIName}}	Enables referencing fields from lookup objects. See above for the list of supported objects and field types. **Note:** This token is not supported for lookups on standard fields. Example: {{Call2_vod__c.Remote_	All	• Email Templates • Email Fragments • Template Fragments • Subject Field • Email

Token	Description	Supported Entry Points	Works In
	Meeting_vod__r.Host_Link_vod__c}}		Builder Subject • Email Builder Templates • Email Builder Cells

Token	Description	Supported Entry Points	Works In
{{ObjectAPIName.RelationshipName.FieldAPIName (FORMAT)}}	If the referenced field is a Date or a Date/Time type field, creators can additionally specify the displayed format of the date or time. See Formatting Tokens to Display Date and Time on page 121 for more information.	All	• Email Templates • Email Fragments • Template Fragments • Email Builder Subject

Token	Description	Sup-ported Entry Points	Works In
			• Em-ail Buil-der Te-mpl-ates • Em-ail Buil-der Cell-s

Token	Description	Supported Entry Points	Works In
{{Object1APIName.FieldAPIName;;Object2APNIName.FieldAPIName;;ObjectAPIName.FieldAPIName}}	In Events Management, Speaker, content creators may use this token to reference fields from Speaker, Attendee and Team Member objects in an email template, as an attendee can fall under multiple different types. To avoid creating email templates for	• Events Management	• Email Templates • Email Fragments • Template Fragments • Subject Field • Email

Token	Description	Supported Entry Points	Works In
	each attendee type, this token will choose the first field that returns the value for a given recipient. The order of preference is given to the field that is referenced first in the token. See Using Approved Email for Events Management for		Builder Subject • Email Builder Templates • Email Builder Cells

Token	Description	Supported Entry Points	Works In
	more information. Example: {{EM_Attendee_vod__c.Name;;EM_Event_Speaker_vod__c.Name;;EM_Event_Team_Member_vod.Name}}		

Token	Description	Supported Entry Points	Works In
{{Object1APIName.FieldAPIName;;Object2APNIName.FieldAPIName(FORMAT)}}	If the referenced field is a Date or a Date/Time type field, creators can additionally specify the displayed format of the date or time. See Formatting Tokens to Display Date and Time on page 121 for more information. **Caution:** The field	- Events Management	- Email Templates - Email Fragments - Template Fragments - Email Builder Subject

Token	Description	Supported Entry Points	Works In
	to format must be listed last in the list of tokens.		• Email Builder Templates • Email Builder Cells

Token	Description	Supported Entry Points	Works In
{{customContent}}	Inserts data from a defined custom query. See Inserting Queried Data into an Approved Email on page 120 for more information. **Caution:** This token is not supported on the Windows Tablet platform.	All	• Email Templates • Email Fragments • Template Fragments • Subject Field • Email

Token	Description	Supported Entry Points	Works In
			Builder Subject • Email Builder Templates • Email Builder Cells

Token	Description	Supported Entry Points	Works In
{{Call2_vod__c.MS_Teams_Remote_Meeting_vod__r.MS_Teams_Meeting_Link_vod__c}}	Enables users to share Microsoft Teams meeting links using Approved Email.	All	Email Templates

Sent Email Related tokens

Token	Description	Supported Entry Points	Works In
{{EmailAddressUnsub}}	Inserts the sent email address in a URL. The links are not available in Preview mode. This token can not be inserted in the body of the email.	All	• Email Templates • Email Fragments • Template Fragments • Subject Field • Email Builder Templates • Email Builder Cells

Token	Description	Supported Entry Points	Works In
{{EmailId}}	Inserts the ID of the Sent_Email_vod record. **Note:** This token is not supported in Edit and Preview mode.	All	• Email Templates • Email Fragments • Template Fragments • Subject Field • Email Builder Templates • Email Builder Cells

Token	Description	Supported Entry Points	Works In
{{OrgId}}	Inserts the ID of the CRM environment from which the email was sent.	All	• Email Templates • Email Fragments • Template Fragments • Subject Field • Email Builder Templates • Email Builder Cells

Token	Description	Supported Entry Points	Works In
{{AppDocId}}	To track email activity of which content is accessed most frequently, content creators may add this token to expand to the 18 digit Salesforce Id of the Approved Document record the token resides in. Example: Click Here. The expanded URL will be: https://www.veeva.com/?AppDocId=a1sJ0000003u458ADS See Tracking Email Activity at the Email Fragment Level for more information.	n/a	• Email Templates • Email Fragments (URLs Only) • Template Fragments (URLs Only) • Email Builder Templates • Email Builder Cells

Functionality Tokens

Token	Description	Supported Entry Points	Works In
{{addToCalendar}}	Inserts an .ICS attachment for recipients to add to their calendars. **Note:** This token is not supported on the Windows Tablet platform.	• Remote Meeting • Medical Events • Events Management	• Email Templates • Email Fragments • Email Builder Templates • Email Builder Cells

Token	Description	Supported Entry Points	Works In
{{approvedEmailAction}}	Creates a link in the email that, when selected, tracks as a standard click event. An email activity record is created in CRM, and a Multichannel Activity record is created with the appropriate record type. See Tracking Multichannel Activities from Approved Emails for more information.	All	• Email Templates • Email Fragments • Template Fragments • Email Builder Templates • Email Builder Cells

Token	Description	Supported Entry Points	Works In
{{EventSession}}	Creates a table that lists out all of the sessions of a planned event. See Event Session and Event Speaker Tokens for more information **Note:** Line breaks and spaces are not supported in this token.	• Events Management	• Email Templates

Token	Description	Supported Entry Points	Works In
{{EventSpeaker}}	Creates a table that lists out all of the speakers of a planned event. See Event Session and Event Speaker Tokens for more information **Note:** Line breaks and spaces are not supported in this token.	• Events Management	• Email Templates

Token	Description	Supported Entry Points	Works In
{{insertEngageAndZoomJoinURL[Language Code]}}	Used to insert both Engage and Zoom URLs in invitations sent to attendees of an Engage meeting or of a virtual event. See Joining an Engage Meeting via Zoom and Joining a Virtual Event via Zoom for more information. **Note:** This token is not supported for Event Speakers.	• Remote Meeting • Events Management	• Email Templates • Email Builder Templates • Email Builder Cells

Token	Description	Supported Entry Points	Works In
{{insertZoomDialInNumbers[Language Code]}}	Used to insert dial-in numbers in invitations sent to attendees of an Engage meeting or virtual event. See Adding Dial-in Numbers to Engage Invitations for more information. **Note:** This token is not supported for Event Speakers.	• Remote Meeting • Events Management	• Email Templates • Email Builder Templates • Email Builder Cells

Token	Description	Supported Entry Points	Works In
{{requiresReview}}	If this token is found in HTML of the Email Template or Template Fragment, the resulting Sent Email record will be created with Status_vod = Pending_vod	All	• Email Templates • Email Builder Templates • Email Builder Cells
{{schedulerLink}}	Adds a link to the Engage Scheduling Site. See Sending Meeting Requests with Approved Email for more information	All	• Email Templates • Email Fragments • Template Fragments • Email Builder Templates • Email Builder Cells

Vault Tokens

Token	Description	Supported Entry Points	Works In
{{$VaultDocID}}	Expands to a URL pointing to a Vault PromoMats document with the corresponding VaultDocID. When using this token, replace VaultDocID with the ID of the appropriate document in Vault. The document ID is visible in the URL when viewing a Vault document. The integer to the right of #doc_info is always the unique Vault document ID. For example, {{$20}} points to Vault document ID 20. Example: https://customer.veevavault.com/ui/#doc_info/**20**/3/0 **Note:** The document referenced by the token should be added to the Approved Document's Other Related Documents relationship in Vault.	All	• Email Templates • Email Fragments • Email Builder Templates

Token	Description	Supported Entry Points	Works In
{{DynamicContentLink}}	Allows end users to send dynamic content to HCPs	All	• Email Templates • Email Fragments • Email Builder Templates
{{ISILink}}	Expands to a URL pointing to a Vault document of type Important Safety Information.	All	• Email Templates • Email Fragments • Email Builder Templates

Token	Description	Supported Entry Points	Works In
{{PieceLink}}	Displays a URL to the Vault document associated as the Related Piece.	All	• Email Templates • Email Frag- ments • Email Builder Templates
{{PILink}}	Displays a URL to a Prescribing Information Vault document.	All	• Email Templates • Email Frag- ments • Email Builder Templates

Token	Description	Supported Entry Points	Works In
{{surveyLink}}	Displays the associated survey. See Surveys in Approved Email for more information.	All	• Email Templates • Email Frag-ments • Email Builder Templates

User Input Tokens

Text Tokens

> **Note:** All user input text is stamped on the User_Input_Text_vod field on the corresponding Sent_Email_vod record.

> **Note:** Zero-width non-joiner tokens (‌) should not be used in User Input Tokens (Text and Picklist Tokens).

Token	Description	Supported Entry Points	Works In
{{customText}}	Creates a blank text area in the email where the end user can enter free text. All entered text is evaluated against any defined restricted words or phrases.	All except Receipts and Double Opt In	• Email Templates • Subject Field
{{customText(Length)}}	Sets a maximum length for the entered free text. For example, {{customText(255)}} adds a text input area that can accept up to 255 characters.	All except Receipts and Double Opt In	• Email Templates • Subject Field

Token	Description	Supported Entry Points	Works In
{{customText(Length|DefaultText)}}	Enables default text that displays when the text input area initially renders to the end user. The end user can then choose to replace the default text with their own. The DefaultText parameter can be used with the Length, or can be used independently using {{customText(|DefaultText)}}. **Caution:** Square brackets are not supported within default text for the custom free text token.	All except Receipts and Double Opt In	• Email Templates • Subject Field

Token	Description	Supported Entry Points	Works In
{{customText:Required}}	Marks the free text field as required, ensuring end users do not exclude critical information in an email. **Note:** This token is not supported on the Browser (Classic) platform	All except Receipts and Double Opt In	• Email Templates

Token	Description	Supported Entry Points	Works In
{{customRichText}}	Enables end users to add more versatile free text to an email through displaying a rich text area. Rich text enables end users to do the following: • Bold, italicize, and underline text • Add bullets and numbers • Increase or decrease indents The default size of the text area is 400 x 300 pixels. **Caution:** Do not enclose this token in or <p> tags. It should only be enclosed by tags	All except Receipts and Double Opt In	• Email Templates

Token	Description	Supported Entry Points	Works In
	that are designed to have a closing tag, for example, <span> or <td> tags. This is because the rich text editor includes its own <p> tags, so enclosing the token in these tags causes styles to be lost. Images are not supported in the Rich Text editor. **Note:** Entered text in a custom rich text field is checked against all defined Restricted Words and Phrases.		

Picklist Tokens

Note the following when using picklist tokens:

- All configured picklist options are stamped on the Email_Config_Values_vod field of the corresponding Sent_Email_vod record.
- Zero-width non-joiner tokens (‌) should not be used in User Input Tokens (Text and Picklist Tokens).
- The first picklist value in Subject lines can be a NULL/blank value. This forces the user to select a subject before sending the email.
- Superscript tags are not supported in the subject line for an Approved Email template. However, content creators can add superscript to the subject line by cutting and pasting a character that is already in superscript into the Subject field in Vault.

Subject {{customText(|test®)}}

Token	Description	Supported Entry Points	Works In
{{customText[options]}}	Adds a picklist field. All values are defined by the content creator, assuring that entries remain compliant while also granting a degree of personalization to the end user. Picklists can also be made with blank values by entering a picklist value of one space character. **Caution:** Do not use the |, ", or quot; characters in picklist values. The width of the picklist can be controlled by including CSS styling in the template's <style> tag for the CSS selector style.hideCustomTextValues.	All except Receipts and Double Opt In	• Email Templates • Subject Field

Token	Description	Supported Entry Points	Works In
	Caution: HTML tags inside this token are not supported. Example: {{customText[Hello|Dear|Hi]}} renders to the end user as a picklist with the following values: • Hello • Dear • Hi The below two tokens will display blank value options in the picklist the end user sees: • {{customText[option1||option2]}} • {{customText[option1|option2|]}}		

Token	Description	Supported Entry Points	Works In
	Caution: Do not include line breaks or new lines in picklist values.		

Token	Description	Supported Entry Points	Works In
{{customText[##ContentToken1##|##ContentToken2##]}}	Content Tokens can be used as values of this picklist by replacing the { and } characters of the content token with #. **Caution:** Do not use the |, ", or quot; characters in picklist values. Tokens from the following objects are supported: • Account • User • User_Detail_vod Referenced fields display by their labels in the email rather than their values, though the values of these fields populate when the email is sent. **Caution:** HTML tags	All except Receipts and Double Opt In	• Email Templates • Subject Field

Token	Description	Supported Entry Points	Works In
	inside this token are not supported. Example: Sarah Jones composes an email to Dr. Clinton Ackerman with the following custom text token: {{customText[##accTitle## ##accFname## ##accLname##, ##accCredentials##|##accTitle## ##accLname##|##accFname##]}} In Edit mode, this token renders to Sarah as a picklist with the following options: • Salutation First Name Last Name, Credentials • Salutation Last		

Token	Description	Supported Entry Points	Works In
	NameFirst Name In Preview mode, this token renders to Sarah as the actual values of the selected option. **Caution:** Do not include line breaks or new lines in picklist values.		
{{customText[##ContentToken1##|##ContentToken2(FORMAT)##]}}	If the referenced field is a Date or a Date/Time type field, creators can additionally specify the displayed format of the date or time. See Formatting Tokens to Display Date and Time on page 121 for more information.	All except Receipts and Double Opt In	• Email Templates

Signature Transaction Receipt Tokens

See Creating Approved Email Receipt Content for more information.

Token	Description	Supported Entry Points	Works In
{{insertCallSample[Column1,Column2]}}	If call sample records exist, a table is rendered displaying all call samples associated with the call as rows. Columns can be defined as parameters of the token. For example: {{insertCallSample[Product_vod__r.Name,Quantity_vod__c]}}	Receipts	• Email Templates
{{insertCallSample[Column1,Column2(FORMAT)]}}	If the referenced field is a Date or a Date/Time type field, creators can additionally specify the displayed format of the date or time. See Formatting Tokens to Display Date and Time on page 121 for more information.	Receipts	• Email Templates

Token	Description	Supported Entry Points	Works In
{{insertCallSample[filterProductType=TYPE,Column1,Column2]}}}}	The filterProductType parameter on the {{insertCallSample}} filters all call samples on the call and only adds a row for each call sample of the specified product type. For example, the following renders two separate tables, one that only contains Samples, the other that only contains Educational Materials. Each table has different columns. {{insertCallSample[filterProductType=Sample,Quantity_vod__c,Product_vod__r.Name,Product_vod__r.Manufacturer_vod__c]}}	Receipts	• Email Templates

Token	Description	Supported Entry Points	Works In
	</br> {{insertCallSample[filter-ProductType=Educational Material,Quantity_vod__c,Product_vod__r.Name]}}		
{{insertMedicalInquiry[Column1,Column2]}}	If Medical Inquiries exist associated with the email, a table is rendered displaying all Medical Inquiries as rows. Columns can be defined as parameters of the token. For example: {{insertMedicalInquiry[Delivery_Method_vod__c,Product__c,Inquiry_Text__c]}}	Receipts	• Email Templates

Token	Description	Supported Entry Points	Works In
{{insertMedicalInquiry[Column1,Column2(FORMAT)]}}	If the referenced field is a Date or a Date/Time type field, creators can additionally specify the displayed format of the date or time. See Formatting Tokens to Display Date and Time on page 121 for more information.	Receipts	• Email Templates
{{insertOrderLine}}	If Order Lines exist associated with the email, a table is rendered displaying all Order Lines as rows. Columns can be defined as parameters of the token. For example: {{insertOrderLine[Quantity_vod__c,Product_vod__r.Name,Net_Price_vod__c,Total_Discount_vod__c]}}	Receipts	• Email Templates

Token	Description	Supported Entry Points	Works In
{{insertSignature}}	Inserts a photo copy of the signature.	Receipts	• Email Templates

Consent Capture Tokens

Token	Description	Supported Entry Points	Works In
{{insertConsentLines}}	Inserts the name of the products, content types, or sub-channels in the sent email. If an account selected Subscribe All, this message displays the channel label and the channel value.	• Double Opt In • Consent Confirmation	• Email Templates

Token	Description	Supported Entry Points	Works In
{{insertMCConsentLines [Sub-scribed,Unsubscribed]}}	Inserts Multichannel_Consent_vod records into the Approved Email. The two parameters represent the label of the section headers. • Subscribed – Displays all Multichannel Consent records with an Opt_Type_vod of either Opt_In_vod or Opt_In_Pending_vod • Unsubscribed – Displays all Multichannel Consent records with an Opt_Type_vod of Opt_Out_vod If the parameters are blank, default labels are defined by the SUBSCRIBED;;ConsentCapture and UNSUBSCRIBED;;ConsentCapture Veeva Messages. **Note:** This token is only supported in emails sent as receipts for Consent Cap-	Consent Capture Receipts	• Email Templates

Token	Description	Supported Entry Points	Works In
	ture.		

Unsubscribe Tokens

Unsubscribe Link Tokens

Token	Description	Supported Entry Points	Works In
{{unsubscribe_product_link}}	Inserts an unsubscribe link in an email. The unsubscribe link inherits the Product or Detail Group + Product associated with the template. When the recipient clicks the unsubscribe link, the opt-out activity is recorded for the Account, email address, and Product or Detail Group + Product in the corresponding Multichannel_Consent_vod record. All future emails to the Account plus the email address are suppressed for this Product or Detail Group + Product until an opt-in activity is collected or the opt-out expiration date is set.	All except Receipts and Double Opt In	• Email Templates • Email Fragments • Email Builder Templates

Token	Description	Supported Entry Points	Works In
{{unsubscribe_product_link[,Unsubscribe_vod.Unsubscribe_Identifier_vod]}}	Allows content creators to customize the provided unsubscribe page to better control branding, translation, and wording. See Adding and Customizing Unsubscribe Links for more information.	All except Receipts and Double Opt In	• Email Templates • Email Fragments • Email Builder Templates
{{unsubscribe_product_link[External URL,Unsubscribe_Identifier_vod]}}	Embeds an unsubscribe link that directs users to an external hosted site defined by the External URL parameter. Used by the Embedded Unsubscribe feature.	All except Receipts and Double Opt In	• Email Templates • Email Fragments • Email Builder Templates

Unsubscribe Page Tokens

Token	Description	Rendered Format	Required?
{{EmailAddressUnsub}}	Displays the email address associated with the unsubscribe request.	Label	✓

Token	Description	Rendered Format	Required?
{{emailProduct}}	Displays the Detail Product, Detail Group, or Content Type associated with the simple unsubscribe request. Although not required, it is recommended to include this token in unsubscribe pages to provide the end user information on what their simple unsubscribe request is for.	Label	✗
{{submitUnsub}}	Renders as an unsubscribe button that is used as the action of an HTML form data for a simple unsubscribe. The opt-out record created from the simple unsubscribe will be for the Product or Content Type of the Email Template where the unsubscribe link is clicked from.	Button	✓

Token	Description	Rendered Format	Required?
{{productModList}}	Displays a selection menu with all Detail Products and Detail Groups with Approved Document records in Veeva CRM. Recipients can select which products or groups to unsubscribe from. If the customized Unsubscribe page is used, the Unsubscribe object has an HTML field where Admins can configure a custom Unsubscribe Page Related Unsubscribe Product records can be created to define the list of Product / Detail Groups displayed. **Note:** Detail Products and Detail Groups restricted to the recipient do not display in	Label	✗

Token	Description	Rendered Format	Required?
	this list.		
{{submitPerfOptions}}	Enables recipients to modify their preferences. Used as the action attribute in the associated HTML form data.	Button	✓
{{cancel}}	Creates a Cancel button. When recipients select this button, no information is saved and the Cancel Confirmation page displays.	Button	✓
{{unsubscribeAll}}	Enables email recipients to unsubscribe from all Approved Email communications. This enables compliance in certain markets that require this option.	Check box	✗

Website Tokens

Token	Description	Supported Entry Points	Works In
{{linkTracker}}	Tracks the following data about a web link shared with an HCP when appended to the link URL: • Source – The location from where the users shared the link. When shared from Veeva CRM, the value is set to VeevaCRM. • Device – The device used by the user to share the link. When shared from Veeva CRM on iPad, the value is set to iPad. • Sent Datetime – The datetime when the user shared the link in ISO 8601 format Example: https://www.verteobiopharma.com?{{linkTracker}} The tokens resolve to the following: https://verteobiopharma.com?src=VeevaCRM&dvc=iPad&sentDateTime=2021-08-25T20:05:28Z See Adding Tracking Tokens to Website URLs for more information about tracking websites.	n/a	• Website URLs

Token	Description	Supported Entry Points	Works In
{{MessageId}}	Inserts the Mobile Id of the Sent_Message_vod record when the website is sent from the mobile device.	n/a	• Website URLS

Adding Footnotes and Citations to Approved Email Content

Because fragments can frequently contain medical claims, information in the fragment, including studies, descriptions, and other references, must be properly cited and numbered.

Approved Email enables content creators to dynamically create and define footnotes and citations within a fragment and have those citations defined elsewhere in the corresponding template.

Adding Footnotes and Citations to Fragments

The following tokens enable content creators to add and define footnotes and citations to a fragment.

<table>
<tr><th>Token</th><th>Description</th></tr>
<tr><td>{{FootnoteSymbol[Sequence Number]}}</td><td>Inserts a footnote symbol. The order is:
* † ‡ § || ¶ For example, {{FootnoteSymbol[3]}} renders as ‡.

If more footnote symbols are needed, symbols can be duplicated by including multiple tokens.

For example, {{FootnoteSymbol[3]}}{{FootnoteSymbol[3]}} renders as ‡‡.</td></tr>
<tr><td>{{CitationNumber[Sequence Number] }}</td><td>Inserts a superscript citation number. The Sequence Number must be a positive, non-zero integer.

For example, the phrase Cholecap{{CitationNumber[2]}} renders as Cholecap[2].

Note: The sequence number is logical and not directly printed in the email. This is to help the designer visually correlate the footnote/citation references in the Fragment to the actual footnote/citations printed in the folder.</td></tr>
</table>

Token	Description
{{FootnoteStart}}	Marks the start of the footnote section. Contents of the foot-note section are parsed out of the fragment and inserted in place of the {{InsertFootnotes}} token in the template. **Caution:** Do not include HTML comments between the {{FootnoteStart}} and {{FootnoteEnd}} tokens.
{{FootnoteEnd}}	Marks the end of the footnote section.
{{CitationStart}}	Marks the start of the citation section. Contents of the citation section are parsed out of the fragment and inserted in place of the {{InsertCitations}} token in the template. **Caution:** Do not include HTML comments between the {{CitationStart}} and {{CitationEnd}} tokens.
{{CitationEnd}}	Marks the end of the citation section.
{{CitationSummaryStart}}	Marks the start of the citation summary section. Contents of the citation summary section are parsed out of the fragment and inserted in place of the {{InsertCitationSummaries}} token in the template. **Caution:** Do not include HTML comments between the {{CitationSummaryStart}} and {{CitationSummaryEnd}} tokens.
{{CitationSummaryEnd}}	Marks the end of the citation summary section.

Example Fragment with Footnotes and Citations

```
<tr>
```

```
  <td>
    <p>
      Cholecap helps lower HDL levels and helps raise LDL levels{{FootnoteSymbol[1]}}{{CitationNumber[1]}}.
    </p>
  </td>
</tr>

{{FootnoteStart}}
<tr>
  <td>
    {{FootnoteSymbol[1]}}: Mean UUI per 24 hours at baseline: 7.8 and 7.7 for Cholecap 8mg and placebo
  </td>
</tr>
{{FootnoteEnd}}

{{CitationSummaryStart}}
<tr>
  <td>
    <b>Lakes L</b>: A 12 week, fixed dose, randomized, double-blind, placebo controlled international study on the efficacy of Cholecap.
  </td>
</tr>
{{CitationSummaryEnd}}

{{CitationStart}}
<tr>
  <td>
    {{CitationNumber[1]}}: Lakes L Clinical efficacy of Cholecap.
  </td>
</tr>
{{CitationEnd}}
```

Adding Footnotes and Citations to Templates

The following tokens designate where citation and footnote information are placed in a template.

Token	Description
{{InsertFootnotes}}	Inserts the Footnotes in the Email Template.
{{InsertCitationSummaries}}	Inserts the Citation Summaries in the Email Template.
{{InsertCitations}}	Inserts the Citations in the Email Template.

> **Note:** Footnotes and citations do not display in the edit or preview mode on the Online and iPad platforms. They only display to the email recipient.

Example Template with Footnotes and Citations

```
<html>
  <head>
  </head>
  <body>
    <p>Hi, Dr. Ackerman,</p>
    <p>Here is some information for you about Cholecap:</p>
    <table>
      {{insertEmailFragments}}
    </table>
    <p>Please let me know if there's any more information I can help
with.</p>
    <table>
      {{InsertFootnotes}}
      {{InsertCitations}}
      {{InsertCitationSummaries}}
    </table>
  </body>
</html>

```

Example of a Sent Email with Footnotes and Citations

The following is an example of how an email using the fragment and template examples provided above displays to the recipient:

Hi, Dr. Ackerman,

Here is some information for you about Cholecap:

Cholecap helps lower HDL levels and helps raise LDL levels*[1].

Please let me know if there's any more information I can help with.

*: Mean UUI per 24 hours at baseline: 7.8 and 7.7 for Cholecap 8mg and placebo

[1]: Lakes L Clinical efficacy of Cholecap.

Lakes L: A 12 week, fixed dose, randomized, double-blind, placebo controlled international study on the efficacy and safety of Cholecap.

Tracking Approved Email Activity Using Tokens

Content creators can add Approved Email content tokens to a URL. This enables easier tracking of email activity associated with that link as each link is customized based on the inserted values of the token.

For example, Sarah Jones sends Dr. Clinton Ackerman an email containing the following link:

Click Here!

When Dr. Ackerman receives the email, he selects the link and is directed to the following webpage:

https://veeva.com/new?AccName=Clinton Ackerman

The Approved Email admin can easily see which account selected the link, since Dr. Ackerman's name is incorporated in the URL.

Adding Tokens to Links

Any Account or User field supported as a merge token can be added to the end of a URL. Added tokens are supported both for manually defined links as well as links generated from other tokens, for example the {{$VaultID}} token.

Ensure end users have FLS read permission to all fields referenced by these tokens.

Inserting Queried Data into an Approved Email

Content creators can use the {{customContent}} token to query information from CRM and add that information to content, greatly enhancing flexibility when adding information to content.

> **Caution:** The {{customContent}} token is not supported on the Windows Tablet platform.

The token uses a SOQL-like querying language and can reference any supported merge token field from the following CRM objects using the {{ObjectAPIName.FieldAPIName}} format:

- Account
- Address_vod
- Approved_Document_vod (only supported in email templates and template fragments)

The token uses the general format:

```
{{customContent[QUERY]}}
```

Where QUERY is replaced by a SOQL-like query using the = operator.

For example:

```
{{customContent[SELECT My_Field__c FROM My_Object__c where
Zip__c = '{{Address_vod__c.Zip_vod__c}}' and Product__c =
'Cholecap']}}
```

The returned value is stored in the Email_Config_Values_vod field on the Sent_Email_vod object. If multiple results are returned, the first result is stored.

> **Note:** The token is case-sensitive, and should not contain extra spaces.

> **Note:** Referential tokens are not supported in the customContent query.

Note: Ensure end users have at least FLS read permission to all fields referenced by this token.

Addresses marked as Primary Addresses always return first if they match the query.

Marking the Custom Content Token as Required

The custom content token can be marked as required by adding :Required after the query:

```
{{customContent[QUERY]:Required}}
```

Caution: The {{customContent:Required}} token is not supported on the Browser (Classic) and Browser (Lightning) platform

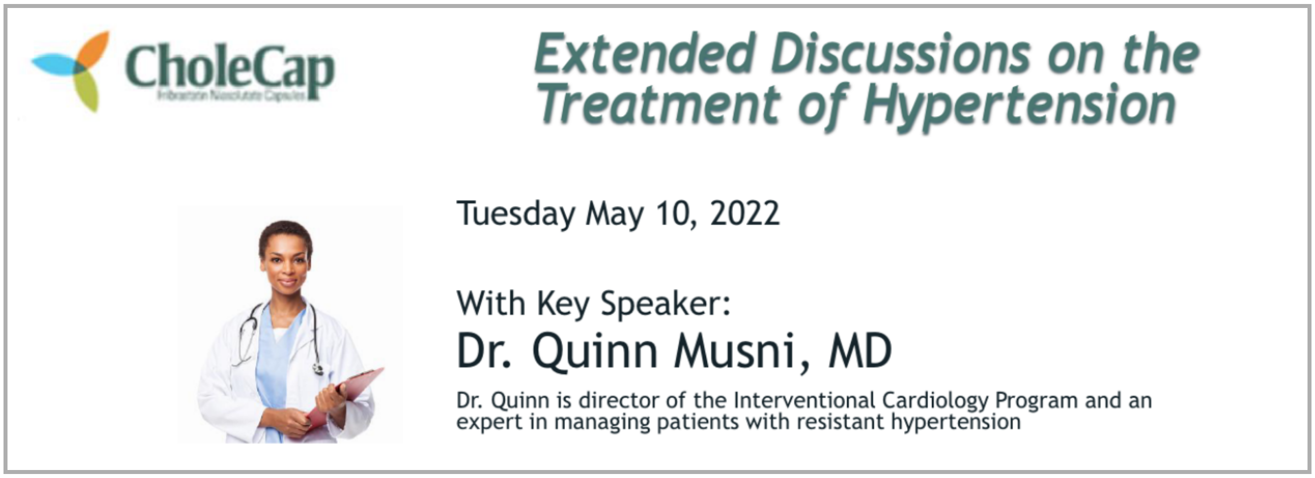
Emails cannot be sent if a required token returns NULL.

Formatting Tokens to Display Date and Time

Browser|iPad|

Content creators can edit Approved Email tokens that reference dates and times to specify their own datetime format. This expands flexibility when creating content that may reference dates and times in multiple ways.

For example, Alice Adams is a content creator who creates an Approved Email Template to serve as an invitation to events. She wants the invitation to display the date and day of the week that the event takes place on. She adds the {{EM_Event_vod__c.Start_Time_vod__c(eeee MMMM dd, yyyy)}} token to the template, which specifies the appropriate date and time format. Later, when Sarah Jones uses this template to serve as invitations to her upcoming event, she previews the invitation and sees the Start_Time_vod field render in the format Alice specified.



Specifying the Format of a Date or Time Token

The following Approved Email tokens are supported in Approved Email Templates, Fragments, and Template Fragments:

- {{ObjectAPIName.FieldAPIName}}
- {{ObjectAPIName.RelationshipName.FieldAPIName}}
- {{Object1APIName.FieldAPIName;;Object2APNIName.FieldAPIName}}

  > **Caution:** The field to formatting must be listed last in the list of tokens.

- {{parentCallDatetime}}
- {{insertCallSample}}
- {{insertMedicalInquiry}}
- {{insertOrderLine}}
- {{customText[##mergeToken1##|##ObjectAPIName.FieldAPIName##]}}

> **Note:** Formatting tokens to display date and time are not supported in Event Materials print invitation templates.

To specify the format for a rendered date or time:

1. Add the **(FORMAT)** placeholder parameter to the appropriate token. For example, {{parentCallDatetime}} becomes {{parentCallDatetime(FORMAT)}}.

2. Replace the FORMAT placeholder with the appropriate format. Supported format elements include:

Element	Supported Field Types	Format	Description	Example Token	Example Output
Year	DateDate/Time	yyyy	Full year	{{parentCallDatetime (MMMM d, **yyyy**)}}	April 1, **2022**
Month	DateDate/Time	M	Numeric month	{{parentCallDatetime(**M** d, yyyy)}}	**4** 1, 2022
		MM	Numeric month with padded 0 if the value is less than 10	{{parentCallDatetime (**MM** d, yyyy)}}	**04** 1, 2022
		MMM	Translated shortened month name	{{parentCallDatetime (**MMM** d, yyyy)}}	**Apr** 1, 2022
		MMMM	Translated month name	{{parentCallDatetime (**MMMM** d, yyyy)}}	**April** 1, 2022

Element	Supported Field Types	Format	Description	Example Token	Example Output
Day	DateDate/Time	d	Numeric day	{{parentCallDatetime (MMMM **d**, yyyy)}}	April **1**, 2022
		dd	Numeric day with padded 0 if the value is less than 10	{{parentCallDatetime (MMMM **dd**, yyyy)}}	April **01**, 2022
Weekday	DateDate/Time	eee	Translated shortened day of the week	{{parentCallDatetime (**eee**, MM/dd)}}	**Fri**, 04/01
		eeee	Translated day of the week	{{parentCallDatetime (**eeee**, MM/dd)}}	**Friday**, 04/01

Element	Supported Field Types	Format	Description	Example Token	Example Output
Hour	Date/TimeTim-e	h	Hour (12-hour time)	{{par-entCallDatetime (eee, **h**:mm a)}}	Fri, **2**:00 pm
		hh	Hour (12-hour time) with padded 0 if the value is less than 10	{{par-entCallDatetime (eee, **hh**:mm a)}}	Fri, **02**:00 pm
		H	Hour (24-hour time)	{{par-entCallDatetime (eee, **H**:mm)}}	Fri, **14**:00
		HH	Hour (24-hour time) with padded 0 if the value is less than 10	{{par-entCallDatetime (eee, **HH**:mm)}}	Thur **08**:00
Minute	Date/TimeTim-e	mm	Minute	{{par-entCallDatetime (eee, h:**mm** a)}}	Fri, 2:**00** pm

Element	Supported Field Types	Format	Description	Example Token	Example Output
AM/PM	Date/TimeTim-e	a	Use with 12-hour time elements to designate AM vs PM	{{par-entCallDatetime (eee, h:mm **a**)}}	Fri, 2:00 **pm**

Additionally, content creators can add spaces, non-breaking spaces ( ), or any of the following single character symbols to separate format elements:

- Grave `
- Up caret ^
- Underscore _
- Dash -
- Colon :
- Question mark ?
- Period .
- Plus +
- Equals =
- At symbol @
- Asterisk *
- Forward-slash /
- Back-slash \
- Ampersand &
- Tilde ~

- Dollar sign $
- Comma ,
- Semi-colon ;

For example, {{parentCallDatetime(eeee, MMMM d yyyy @ h:mm a)}} renders as:

Friday, April 1 2022 @ 12:30 pm

Note: Brackets [ ], Curly brackets {}, and the # character are not supported for separating format elements.

Considerations

- Content creators should thoroughly test all content that formats dates and times via this feature
- Months and days of the week automatically translate based on the sender's language
- Formatting is not supported with the {{customContent}} token used to query Approved Email data
- Tokens without any datetime formatting will render in Salesforce's default MM/dd/yyyy for dates and yyyy-MM-ddThh:mm:ss for datetimes

Personalizing User Profiles

iPad|Browser|

End users can personalize an Approved Email with information about themselves, including a photo. This object is highly customizable, and admins can create custom fields to suit each customer's needs without impacting the standard User object. Additionally, content admins can reference these fields using tokens, ensuring the appropriate information displays for each sent Approved Email.

For example, Sarah Jones adds a photo of herself to her user profile to add a layer of personalization to her Approved Emails. Content creators previously placed tokens referencing the photo field in Approved Email content, so when Sarah Jones sends an Approved Email to Dr. Ackerman, her photo displays in the appropriate location in the email.

> **Caution:** Photos captured on Windows Tablet devices must be taken in landscape mode.

Configuring the User Profile

To enable this feature:

1. Create a new User Detail record for the user.
2. Verify that the user is the owner of the User Detail record.
3. Create all appropriate custom User_Detail_vod fields. These fields should be one of the supported data types of the merge token so they can be added to Approved Email content.
4. Grant end users FLS edit permission to all appropriate User_Detail_vod fields.
5. Add these fields to the appropriate User_Detail_vod object page layouts.

   > **Note:** The Photo_vod field must be added to the page layout for users to be able to manage their user photo and see it displayed on the User Detail section of My Profile.

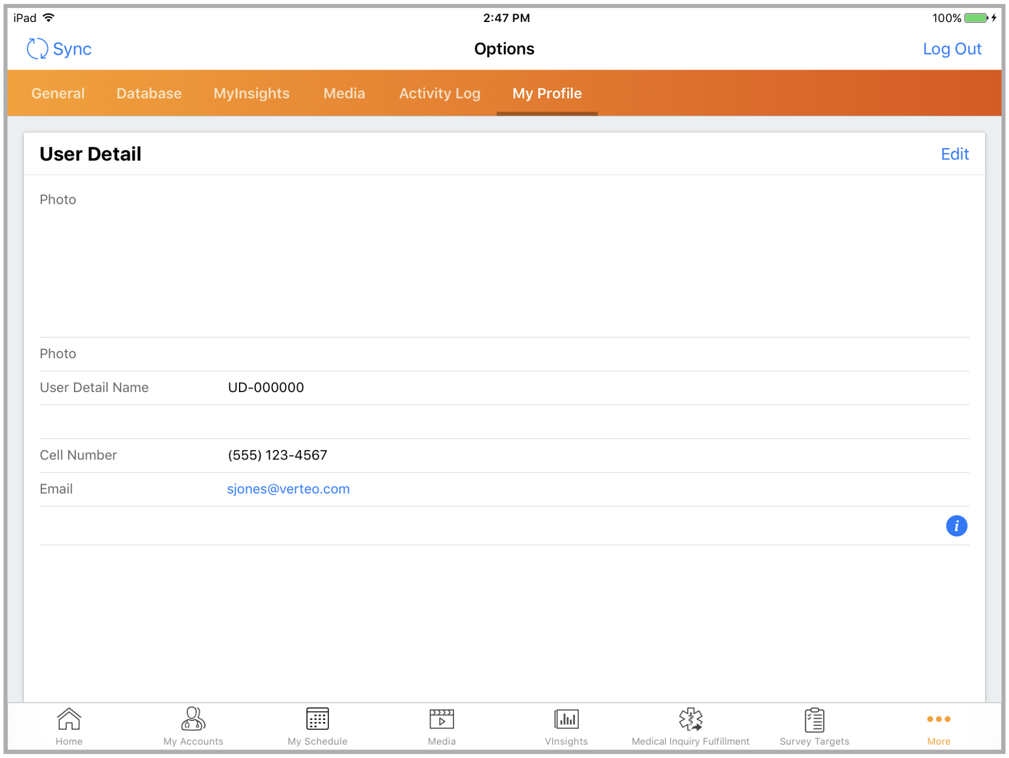
   > **Note:** When granting end users the ability to edit their photo, add the User_Detail_Image_vod **Visualforce component** to the page layout and verify users have access to the Visualforce component.

6. Activate the appropriate VMOC for the User_Detail_vod object.

Editing a User Profile

End users can view and edit their specific user profile on any enabled offline device:

1. Navigate to the **Options** menu in CRM.
2. Select the **User Profile** tab.



Adding User Profile Information to Approved Email Content

Content creators can insert one of the following tokens to add User Profile information to Approved Email content:

- {{userPhoto}} – Inserts a photo of the end user
- {{User_Detail_vod__c.FieldAPIName}} – uses the standard {{ObjectAPIName.FieldAPIName}} format to reference any supported Veeva or custom User_Detail_vod field

Adding and Customizing Unsubscribe Links

Approved Email provides a built-in email unsubscribe solution that respects recipient preferences and complies with anti-spam regulations present in some markets. These unsubscribe pages are automatically available to any recipient of an Approved Email.

Links are automatically generated and included in Approved Emails when the {{unsubscribe_product_link}} token is included in a template of a sent email.

Optionally, content creators can customize the provided pages to better control branding, translation, and wording of the unsubscribe page. To customize the default text, edit the appropriate Approved Email-category Veeva Message.

Name	Description
UNSUBSCRIBE_CANCEL_CHANGES_HTML	Used to hold the cancel confirmation HTML document displayed to the end user should the cancel button be clicked.
UNSUBSCRIBE_OPTION_HTML*	Used to house the HTML document displayed to the Approved Email recipient when the Unsubscribe link is clicked. **Caution:** Admins must update the CSS styling for the input class to include `color: black;` in order to display correctly on certain devices.
UNSUBSCRIBE_CONFIRMATION_HTML	Used to house the HTML document displayed to the Approved Email recipient as a confirmation for the successfully executed Unsubscribe action.
UNSUBSCRIBE_MODIFY_OPTIONS_CONFIRMATION_HTML	Used to house the modify options confirmation HTML document displayed to the end user during the unsubscribe process

> **Note:** *In the HTML, dd class="detailProduct" and the dt class="productGroup", supports CSS styling for the content inside the {{productModList}} tag.

Controlling the Language of Default Unsubscribe Pages

By default, templates for the Unsubscribe pages are supplied in all of Veeva CRM's supported languages. Unsubscribe pages display according to the recipient's preferred language. If the language of the account is null, the Unsubscribe page displays according the user's preferred language. If no Veeva Message for the user’s language is defined, the Unsubscribe page displays in English.

Customizing the Unsubscribe Pages

The HTML for the three pages (Unsubscribe Landing page, Confirmation, and Cancellation page) are stored in the following Veeva Messages:

- UNSUBSCRIBE_OPTION_HTML
- UNSUBSCRIBE_CONFIRMATION_HTML
- UNSUBSCRIBE_CANCEL_CHANGES_HTML

The HTML for these pages can be completely customized by content creators, though all CSS styles must be inline.

> **Note:** Images must be hosted on your own servers when referenced inside the HTML.

Customers who have accounts with different preferred languages can translate the HTML code accordingly and store it in the Veeva Messages for those respective languages.

For example, Verteo has some Accounts that have preferred language set to Spanish and others as French. The Admin can modify the landing pages for each language and then store it in the UNSUBSCRIBE_OPTION_HTML Veeva message for both languages. When the recipient selects the unsubscribe link, the page corresponding to the preferred language displays.

The default unsubscribe landing page contains the following actions:

- Simple Unsubscribe – When the recipient selects the Submit button in the first section of the unsubscribe landing page, an opt-out record is created in Veeva CRM for that account's email address for the particular product for which email was sent
- Modify Email Preferences – Enables the recipient to modify their preferences for the current product and other products. When the recipient selects the Submit button in the second section, opt-ins are created for all the selected products and product groups and opt outs are created for all not selected. If nothing is selected, opt outs for all products are created.
- If the Cancel button is clicked, there is no change in the consent record for any products

When customizing the Veeva Messages controlling these pages, ensure the following Unsubscribe Tokens are included as they drive functionality.

Unsubscribe Tokens

The following table describes the fragment tokens associated with the Unsubscribe Process:

Token	Description	Rendered Format	Required
{{submitUnsub}}	Renders as an unsubscribe button that is used as the action of an HTML form data for a simple unsubscribe.	Button	✓

Token	Description	Rendered Format	Required
{{EmailAddressUnsub}}	Displays the email address associated with the unsubscribe request.	Label	✓
{{emailProduct}}	Displays the Detail Product or Detail Group associated with the unsubscribe request.	Label	✓
{{productModList}}	Displays a selection menu with all Detail Products and Detail Groups with Approved Document records in Veeva CRM. Recipients can select which products or groups to unsubscribe from. **Note:** Detail Products and Detail Groups restricted to the recipient do not display in this list.	Label	✗
{{submitPerfOptions}}	Enables recipients to modify their preferences. Used as the action attribute in the associated HTML form data.	Button	✓

Token	Description	Rendered Format	Required
{{cancel}}	Creates a Cancel button. When recipients select this button, no information is saved and the Cancel Confirmation page displays.	Button	✓
{{unsubscribeAll}}	Enables email recipients to unsubscribe from all Approved Email communications. This enables compliance in certain markets that require this option.	Check box	✗

Embedding the Unsubscribe Page

Veeva provides a standard, out-of-the-box unsubscribe page that references the HTML of the respective Veeva messages. Optionally, content creators can embed the standard unsubscribe page onto any externally hosted page, enabling greater control of branding and recipient experience.

For example, the content creator for Verteo BioPharma creates an externally hosted page that email recipients can use to unsubscribe from Approved Emails. They add the Veeva-provided HTML code to the site, which embeds the Approved Email unsubscribe page into the page.

Embedding Unsubscribe Page in a Web Page

To embed the unsubscribe page in an externally hosted page, add the following HTML snippet to the appropriate page:

```
<div align="center" id="unsubscribe"> </div>

<!-- The iFrame and Unsubscribe Page replace the above <div> tag. Note that the id of the <div> matches the first parameter of the constructor. -->
<script>
  var tag = document.createElement('script');
  tag.src = "//cdnmc1.vod309.com/multichannel/veeva/js/unsubscribe/embed-unsubscribe.js";
  var firstScriptTag = document.getElementsByTagName('script')[0];
  firstScriptTag.parentNode.insertBefore(tag, firstScriptTag);
  // This function creates an <iframe> (and unsubscribe iframe viewer) after the API code downloads.
  var unsubscribe;
  function onUnsubscribeAPIReady() {
    unsubscribe = new UN.Frame('unsubscribe', {height: '600px',width: '80%',});
  }
</script>
```

The embedded unsubscribe snippet creates an iFrame whose size can be defined in pixels using the height and width parameters.

Linking to an Embedded Unsubscribe Page

Content creators can reference an externally hosted unsubscribe page using the following token:

{{unsubscribe_product_link[External URL,Value of the appropriate Unsubscribe_Identifier_vod Field]}}

For example, to embed a URL that unsubscribes recipients from a product corresponding to an Unsubscribe_vod record with an Unsubscribe_Identifier_vod field of 101, the token would be:

{{unsubscribe_product_link[https://www.example.unsubscribe.com,101]}}

For more information, see Configurable Unsubscribe.

Unsubscribe by Content Type

iPad|Browser|

Content creators can alter the unsubscribe link to enable recipients to unsubscribe and edit their preferences for content types rather than product.

Configuring Unsubscribe by Content Type

To enable this feature:

1. Grant integration users FLS edit permission to the **Consent_Level_vod** field on the Unsubscribe_vod object, and the **Content_Type_Display_Name_vod** field on the Unsubscribe_Products_vod object.
2. Place the **Consent_Level_vod** field on the appropriate Unsubscribe_vod object page layouts.
3. Create an Unsubscribe record with the following values:
   - Record Type = Approved_Email_Unsubscribe_vod
   - Consent_Level_vod = Content_Type_vod
   - Unsubscribe_Identifier_vod = a unique value
4. Create one or more Unsubscribe_Products_vod records with the following parameters. This step is optional.
   - Record type = Approved_Email_Content_Type_Unsubscribe_vod
   - Content_Type_vod = an existing Content Type record.
   - Display_Order_vod record - See Displaying Products on the Unsubscribe Page on the next page for more information

> **Note:** If Unsubscribe_Products_vod records are not created, the entire list of content types with Approved_Document_vod records displays.

Displaying Products on the Unsubscribe Page

iPad|Browser|

Content creators can customize the way, number, and manner that products display on the Unsubscribe page, helping recipients decide which products to unsubscribe from.

Configuring Displaying Products on the Unsubscribe Page

To create and configure the Unsubscribe page for Products:

1. Grant admins and integration users the following permissions:

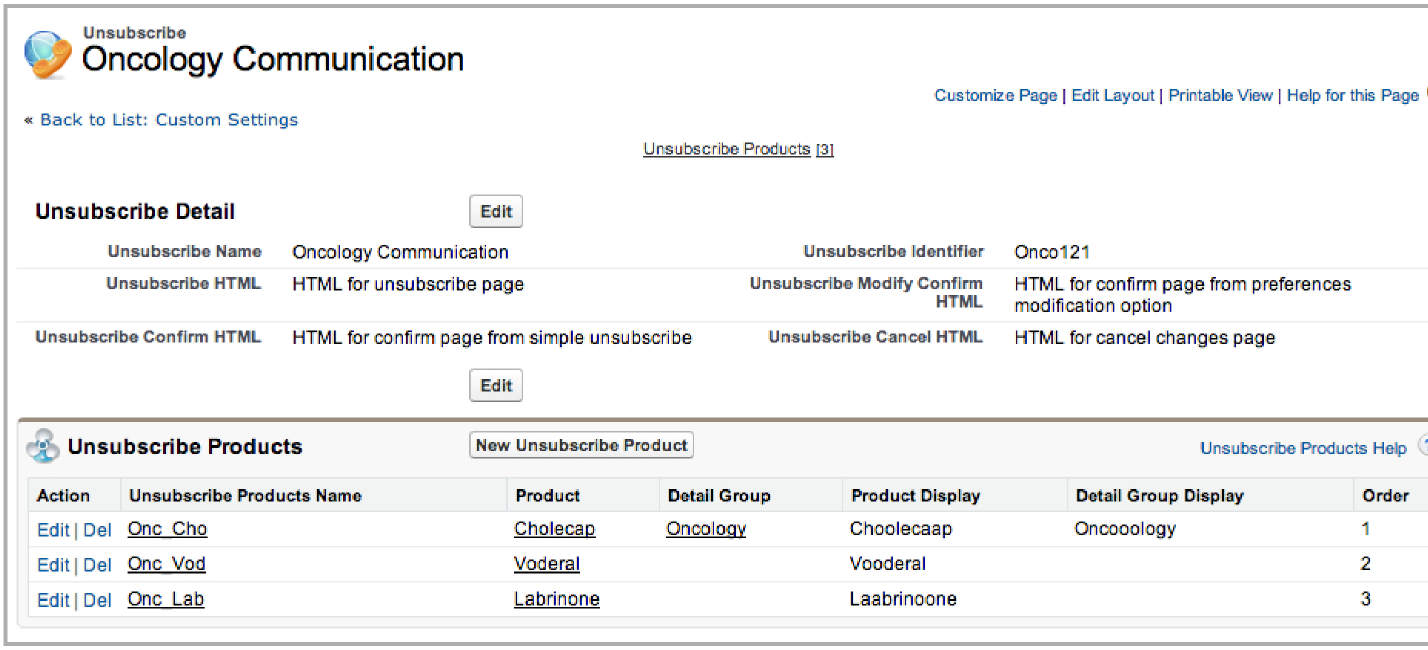
Object	OLS	Record Types	Fields	FLS
Unsubscribe_vod	CRUD	Approved_Email_Unsubscribe_vod	• Unsubscribe_Identifier_vod • Unsubscribe_HTML_vod • Unsubscribe_Confirm_HTML_vod • Unsubscribe_Cancel_HTML_vod • Unsubscribe_Modify_Confirm_HTML_vod	Edit
Unsubscribe_Products_vod	CRUD	Approved_Email_Unsubscribe_vod	• Content_Type_Display_Name_vod • Unsubscribe_vod • Product_vod • Detail_Group_vod • Product_Display_vod • Detail_Group_Display_vod • Display_Order_vod	Edit

2. Create a tab for the **Unsubscribe_vod** object.

3. Grant admins and integration users access to the created **Unsubscribe** tab.
4. Navigate to the **Unsubscribe** tab.
5. Create a **New Unsubscribe** record.
6. Define a **Name** and an **Identifier**.
7. Associate the **Unsubscribe Products** to display on the page, or create a **New Unsubscribe Product**.
8. Enter the **Product Name**.
9. Define the order to display the product. 1 displays first, 2 second, etc…
10. Enter a **Product Display**. This is the alternate display name for the product that displays to recipients.

    > **Note:** Customers frequently use abbreviations for product names within CRM that recipients may not understand. This feature enables customers to define alternate names for Product and Detail Group names.

11. Enter a **Detail Group Display**. This is the alternate display name for the detail group that displays to recipients.
12. Click **Save**.



Adding the Unsubscribe Token to Approved Email Content

Once the Unsubscribe record and products are defined, content creators can add an unsubscribe token to the appropriate Email Template, Email Fragment or Template Fragment's HTML. Customers can also create an externally-hosted Unsubscribe page and link to it with a token.

Testing Staged Approved Email Content

iPad|Browser|

Content admins can test Approved Email content with a status of Staged by sending the email to any email address. This enables content admins to thoroughly test content to ensure it displays and functions as intended before making the decision to make the content available to end users.

By default, Approved Emails sent by content admins are sent to the email address defined in the Email field of their User record.

> **Note:** When testing staged content, any related documents listed in the Other_Document_ID_List_vod, ISI_Document_ID_vod, PI_Document_ID_vod, or similar fields must be in an approved state in Vault. Otherwise, an error displays and the email is not sent.

Overriding Staged Content Recipients

Administrators may want to override the recipients of staged content to a single email address responsible for receiving all testing content. Admins can populate the **APPROVED_EMAIL_TEST_ADDRESS_vod** Approved Email custom setting to ensure all staged content sent by content admins is sent to the same address, overriding the Email field on the User object.

The following table outlines where staged Approved Email content is sent depending on settings:

APPROVED_EMAIL_TEST_ADDRESS_vod	User is an Approved Email Admin	Email is sent to
NULL	Yes	User.Email
NULL	No	Account's Email Address
test@example.com	Yes	test@example.com
test@example.com	No	test@example.com

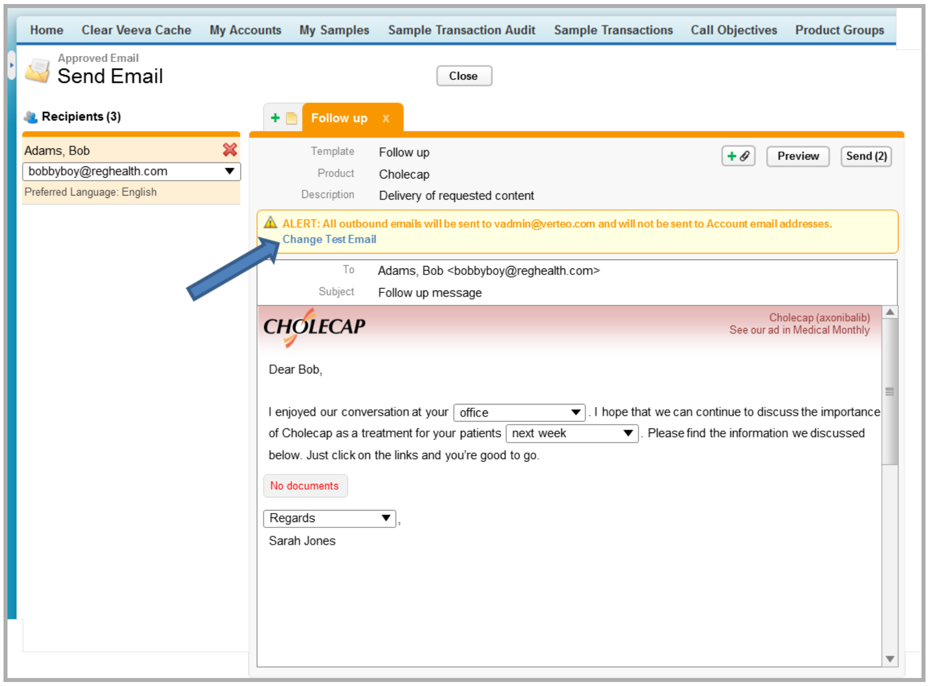
Changing the Test Email Address

Browser|

Content admins can quickly change the value of the APPROVED_EMAIL_TEST_ADDRESS_vod Approved Email setting from within a composed Approved Email. This enables greater flexibility when content admins test staged content while maintaining the added layer of security the custom setting provides.

To change the value of the test address, select the **Change Test Email** link in the email header. This immediately updates the value of the APPROVED_EMAIL_TEST_ADDRESS_vod setting.

> **Note:** Changing the address in this manner only works if a test email was entered in the APPROVED_EMAIL_TEST_ADDRESS_vod setting. If the setting is blank (null), users can still change the value for the current test email from the link in the header, but the test address is not saved.



Previewing Rendered Approved Email Content

Browser|

Users in Lightning Ready orgs can preview rendered Approved Documents or sent emails directly within CRM. This enables users to ensure information in the content is correct.

For example, Amy Brown wants to review the Cholecap Event Feedback Email Template. When she navigates to the record's detail page, she can see the email template HTML rendered directly within CRM.

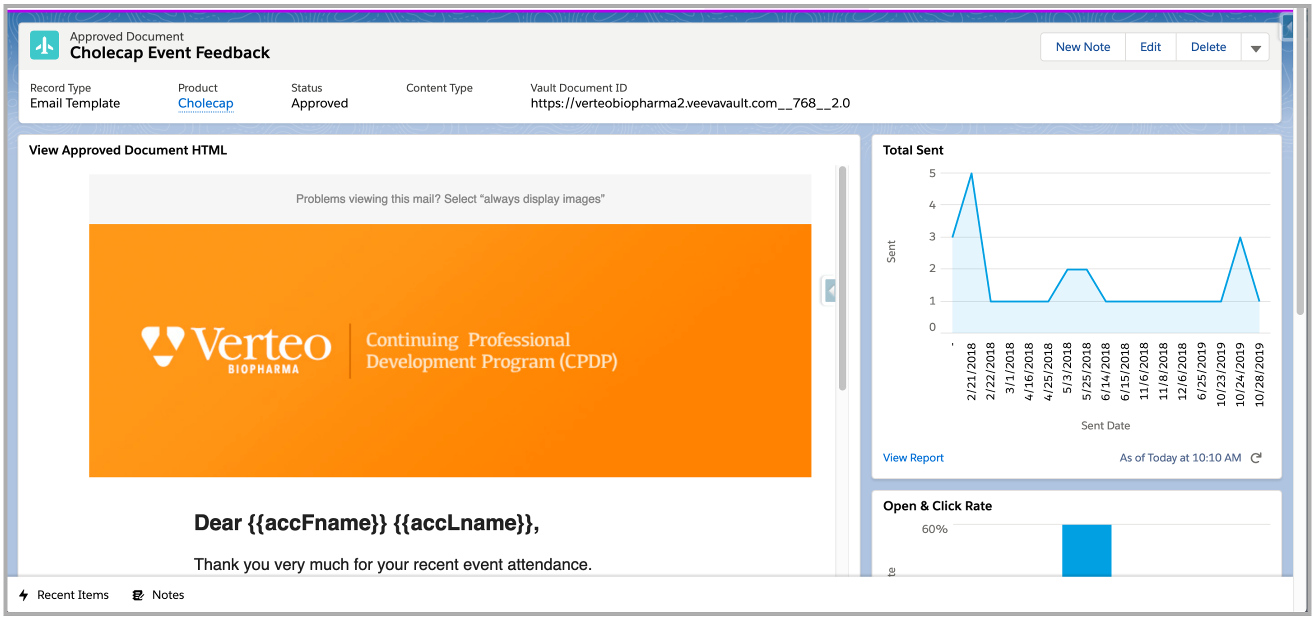
Displaying Approved Documents and Sent Emails

Displaying HTML content in Approved Documents and displaying HTML content in Sent Emails can be configured independently.

Approved Document HTML Content

To display Approved Document HTML content:

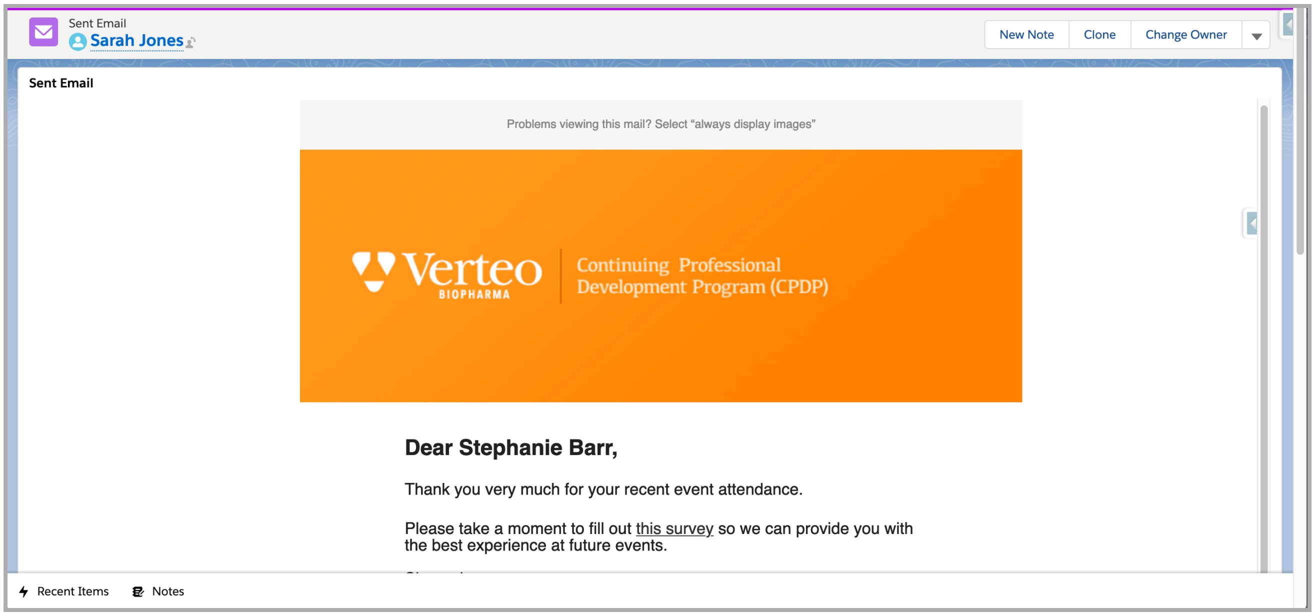
1. Ensure the Veeva CRM Lightning Ready package is deployed.
2. Ensure at least one Lightning record page exists for the **Approved_Document_vod** object.
3. Grant admins and end-users access to the **ViewApprovedDocumentHTML_vod** Visualforce page.
4. Navigate to the appropriate **Approved_Document_vod** Lightning record page.
5. Add a new Visualforce component to the page layout.
6. Assign the **ViewApprovedDocumentHTML_vod** Visualforce page to the component.
7. Select **Save**.
8. Clear the Veeva cache.



Sent Email HTML Content

To display Sent Email HTML content:

1. Ensure the Veeva CRM Lightning Ready package is deployed.
2. Ensure at least one Lightning record page exists for the **Sent_Email_vod** object.
3. Grant admins and end-users access to the **ViewSentEmailHTML_vod** Visualforce page.
4. Navigate to the appropriate **Sent_Email_vod** Lightning record page.
5. Add a new Visualforce component to the page layout.
6. Assign the **ViewSentEmailHTML_vod** Visualforce page to the component.
7. Select **Save**.
8. Clear the Veeva cache.



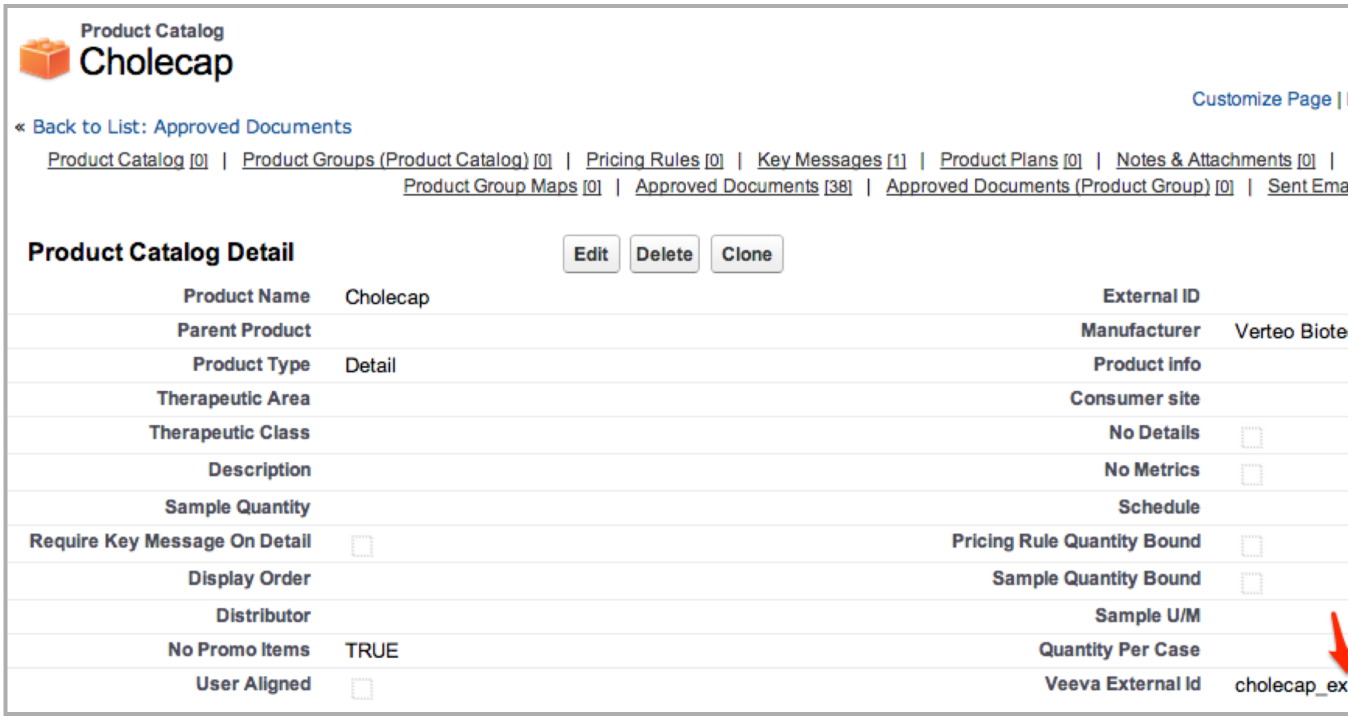
Matching Products for Approved Email Content

Approved Email content must be associated to a product in Vault, and a corresponding product must exist in CRM. To match Products from Vault to the Product records in CRM, the external IDs must be specified for both the Product__v object in Vault and the Product_vod object in CRM.

Defining External IDs in CRM

1. Navigate to a **Product_vod** record.
2. Enter a value in the **VExternal_Id_vod** field that corresponds to an existing product in the Product Catalog (Product_vod object). This field must be unique and is case insensitive.

   For example, Cholecap's VExternal ID might be cholecap_externalId.



3. Repeat this process for all Product_vod records that will have Approved Email content aligned to them.

Defining External IDs in Vault

1. Navigate to the **Product Catalog** in Vault.
2. Enter an External ID and Country for each product in the Vault Product Catalog. External IDs must match the VExternal_Id_vod field on the corresponding Product_vod record in CRM.

   For example, if Cholecap's VExternal Id in CRM is cholecap_externalId, then the External ID of Cholecap in Vault must also be cholcecap_externalId.

When connecting multiple CRM orgs to one instance of Vault, each connected org must contain a complete list of external IDs defined in the Vault product catalog. To work around this limitation, the Vault Login Credential Management section enables admins to define queries to only sync certain products from Vault to that org.

Caution: The IN operator is not supported by this query.

Using Detail Groups in PromoMats / MedComms

iPad|Browser|

Detail Groups allow end users to organize assigned products by pre-defined groupings, making it easier to select the appropriate product to talk about.

When using Detail Groups in a CRM org, they must also be enabled in Vault:

1. Populate the **Detail Group** values in Vault (Business Admin->Picklists->DetailGroup).
2. Click **Edit** to add new Detail Groups. Do not delete the Common entry. This is required to map to the default Common group delivered in Veeva CRM.

To enable Detail Groups, add the picklist to the Email Template, Email Fragment, and Template Fragment document types.

1. Navigate to the **Document Properties**. (Admin->Content Setup).
2. Select each of the above document types.
3. Select **Add**, Existing Shared Property, Detail Group. You should only be able to select one value
4. Navigate to **Property Layout** (Admin->Content Setup->Property Layout) to order the Product Properties.
5. Select **Product Information** from the list
6. Click **Edit** and order so Detail Group is first, Product is second.

Enabling Property Dependencies in Vault

Content admins in Vault can setup dependent picklists where specific products are grouped beneath specific Detail Groups to represent the CRM Detail Group + Product relationships.

This helps guarantee valid Detail Group + Product attributes are selected.

To setup Property Dependencies:

1. Navigate to **Property Dependencies**.
2. Click **Add a New Property Dependency**.
3. Select **Controlled by Document Property**.
4. Select the **Type**.
5. Repeat for Email Template, Email Fragment, Template Fragment.
6. Select **Detail Group** from the Property picklist.
7. Click **OK**.
8. Select the desired Detail Group from the picklist in the Condition section if property equals Detail Group.
9. Select **Picklist** from the first picklist under the Dependency Rules section.
10. Select **Product** from the next picklist.
11. Choose the list of products to associate with the selected Detail Group.

Defining the Product Detail Group Content

When loading new Approved Email content into Vault, there is a mandatory Product attribute that must be set for the document. Content admins can also define the Detail Group can also be set for the Vault document.

These Product and Detail Group attributes are used by the Approved Email solution to accurately align Vault content to CRM end users. The Product value corresponds to the Detail Product in Veeva CRM and the Detail Group corresponds to the Detail Group in Veeva CRM. If an end user is aligned to a specific Product and/or Detail Group (brand in some cases), then by default, the end user will gain access to the approved Vault content aligned to that product.

Caution: Unless Multi-Product Approved Email Content on page 28 is enabled, there can only be one Product and one Detail Group assigned to a single document. (Vault allows more than one Product to be assigned to a document, but this is not supported by Approved Email) CRM uses an external ID matching scheme to accurately assign the Product/Detail Group references in Veeva CRM, and the external IDs must be setup in advance in Vault and in CRM.

Understanding the Language Property

The language property in Vault indicates the language in which the Vault document is written. This language value will be passed to Veeva CRM via the integration service and will be used in language filtering by the end users of the Approved Email solution. In addition to displaying the language of the document in Veeva CRM, if loaded, the preferred language will also be displayed for each recipient during the send email process. In this case end users will be able to compare the preferred languages of on recipient to another and ultimately to the language of the document. This helps the end user understand if the best version of the content from a language perspective is being sent to the selected recipients.

Aligning Approved Email Content to Users

iPad|Browser|

Customers may use a large variety of content when using Approved Email. To assist end users in selecting the appropriate content when composing Approved Emails, content admins can implement layers of control to refine the content that displays as available.

The following methods can be used independently and in conjunction with one another to provide a nuanced and compliant method to align and restrict Approved Email content:

- The Status_vod field on the Approved_Document_vod object
  - End users can only access Approved Documents where Status_vod is Approved_vod
  - Content admins can only access Approved Documents where Status_vod is either Approved_vod or Staged_vod
- The My_Setup_Products_vod object – End users and content admins can only access content that is aligned to a Detail Product or Topic that the user can access via My Setup Products
- Sharing Rules – Custom sharing rules can be setup on the Approved_Document_vod object. The Territory_vod field on the Approved_Document_vod object can be used as the basis for sharing rules in CRM by populating the corresponding field in Vault.
- Restricted Products and Allowed Products – Approved Email respects both Allowed and restricted Products, ensuring end users cannot send emails containing content about restricted products
- VMOCs – The WHERE clause of VMOC for the Approved_Document_vod object can be customized to filter which Approved_Document_vod records sync down to offline devices

Example: Status and Product Groups

For example, the following templates exist in an org:

- Template A
  - Status: Approved
  - Product Group: Cholecap
- Template B

    - Status: Staged
    - Product Group: Cholecap
- Template C
    - Status: Approved
    - Product Group: Labrinone

Sarah Jones is an Approved Email end user with access to Cholecap in My Setup. When Sarah Jones sends an Approved Email to Dr. Ackerman, only Template A displays as available for selection since Template B has a status of Staged and Template C is for Labrinone, which Sarah does not have access to.

Aligning Approved Email and CLM Content

Browser (Classic, Lightning)|CRM Desktop (Mac, Windows)|iPad|iPhone|

Content alignment allows customers to give the right users access to the right content using content groups. Content groups are groups of users who have access to the same content, allowing admins to efficiently manage the Approved Email and CLM content assigned to large groups of users. Content alignment provides customers with more transparency over what content is available for specific types of users. Customers can use content alignment with Align and/or Vault to further streamline the process. Customers can build dashboards and reports to understand which users have access to which content.

> **Note:** Veeva CRM does not support using both content alignment and custom sharing rules to manage user access to content.

Configuring Content Groups

Content groups can be configured to work with Align and/or Vault in one of the following combinations:

- CRM only
- CRM and Align
- CRM and Vault
- CRM, Align, and Vault

Configuring Content Groups in CRM

To enable content groups in CRM:

1. Ensure the Default Sharing Settings for the following objects are set to **Private**:
    - Approved_Document_vod
    - CLM_Presentation_vod

- Key_Message_vod

2. Ensure the UserType field on User records for end users is set to **Standard**.
3. Grant admins the following permissions:

Object	OLS	Record Types	Fields	FLS
Content_Group_Content_vod	CRUD	• Approved_Document_vod • CLM_Presentation_vod • Key_Message_vod	• Approved_Document_vod • CLM_Presentation_vod • Content_Group_vod • Key_Message_vod • RecordTypeId • Record_Type_Name_vod • VExternal_Id_vod	Edit
Content_Group_User_vod	CRUD	User_vod	• Content_Group_vod • RecordTypeId • User_vod • VExternal_Id_vod	Edit

Object	OLS	Record Types	Fields	FLS
Content_Group_vod	CRUD	Content_Group_vod	• Country_vod* • Description_vod* • Detail_Group_vod* • Group_vod • External_Id_vod • Language_vod* • Name • Product_Group_vod* • Product_vod* • RecordTypeId • Status_vod **Note:** * This field is optional and can be used to provide additional context.	Edit

4. Grant the integration user access to the following Apex classes:
   - VeevaContentGroupContentTriggerHandler
   - VeevaContentGroupTriggerHandler
   - VeevaContentGroupUserTriggerHandler

- VeevaSetupObjectHandler
- VeevaTriggerHandler

5. Ensure VMOCs for the following object are **Active** and **Enable Enhanced Sync** is selected:
   - Approved_Document_vod
   - CLM_Presentation_Slide_vod
   - CLM_Presentation_vod
   - Key_Message_vod

Configuring Content Groups in Align

To enable content groups in Align, ensure Content Groups in Align are configured and the CRM configuration above is complete.

Configuring Content Groups in Vault

To enable content groups in Vault:

1. Ensure the CRM Vault Metadata Sync is configured and the CRM configuration above is complete.

2. Grant integration users the following permissions:

Object	OLS	Record Types	Fields	FLS
Content_Group_Content_vod	CRU	• Approved_Document_vod • CLM_Presentation_vod • Key_Message_vod	• Approved_Document_vod • CLM_Presentation_vod • Content_Group_vod • Key_Message_vod • RecordTypeId • Record_Type_Name_vod • VExternal_Id_vod	Edit

Object	OLS	Record Types	Fields	FLS
Content_Group_vod	CRU	Content_Group_vod	• Country_vod* • Description_vod* • Detail_Group_vod* • Group_vod • External_Id_vod • Language_vod* • Name • Product_Group_vod* • Product_vod* • RecordTypeId • Status_vod **Note:** * This field is optional and can be used to provide additional context.	Read

3. Perform the following steps in Vault:

   - Add the **crm_content_group__v** Shared Field to the appropriate document types.
   - Grant Vault integration users the following permissions:

Object	Object Permission	Object Types	Fields	Field Permission
crm_content_group__v	CRE	n/a	• country__v • crm_org__v • crm_id__v • description__v • external_id__v • id.crm_detail_group__v • id.crm_product_group__v • id.crm_product__v • language__v • name__v	Edit

Object	Object Permission	Object Types	Fields	Field Permission
crm_org__v	CRE	n/a	• crm__org_id__v • name__v	Edit

Creating and Managing Content Alignment

Content alignment is composed of the following objects:

- Content_Group_vod - defines a group of users aligned to the same content. A content group can have multiple CRM users and many pieces of CLM and Approved Email content. A corresponding Salesforce Group record is automatically created for each Content_Group_vod record.
- Content_Group_User_vod - assigns a user to a content group. A user can be assigned to multiple content groups. A corresponding Salesforce GroupMember record is automatically created for each Content_Group_User_vod record.
- Content_Group_Content_vod - assigns a piece of content to a content group. A piece of content can be assigned to multiple content groups. For Approved Email, a piece of content consists of an Approved_Document_vod record. For CLM, a piece of content consists of a CLM_Presentation_vod record and its associated Key_Message_vod records. For each Content_Group_Content_vod record, a corresponding record is automatically created in the Salesforce Approved_Document_vod__Share, CLM_Presentation_vod__Share, or Key_Message_vod__Share tables.

The process of creating and managing content groups, and assigning users and content to each group depends on whether the customer is integrating CRM with Align and/or Vault.

Creating and Managing Content Alignment in CRM Only

To align content in CRM:

For customers who are only using CRM, admins must manually create or data load all Content_Group_vod, Content_Group_User_vod, and Content_Group_Content_vod records for each content group.

1. Define content groups. Create **Content_Group_vod** records with the **Content_Group_vod** record type and populate at least the following fields:
   - Name - name of the group
   - Status_vod - Active. Set to Inactive when deactivating but not deleting a content group. Approved_Document_vod__Share, CLM_Presentation_vod__Share, and Key_Message_vod__Share records for all content are deleted and users no longer have access to that content.
   - External_Id_vod - unique ID of the group

   > **Note:** Define a naming convention and use optional fields, for example, Country_vod, Description_vod, and Language_vod, to provide additional context for the content group, which may be useful across teams.

2. Assign users to each content group. Create **Content_Group_User_vod** records with the **User_vod** record type and populate at least the following fields:
   - Content_Group_vod - lookup to the Content_Group_vod record, usually the External ID of the content group
   - User_vod - lookup to the User record
3. Assign content to content groups.
   - To assign Approved Email content, create **Content_Group_Content_vod** records with the **Approved_Document_vod** record type and populate at least the

following fields:

  - Content_Group_vod - lookup to the Content_Group_vod record, usually the External ID of the content group
  - Approved_Document_vod - lookup to the Approved_Document_vod record
  - Record_Type_Name_vod - Approved_Document_vod

- For a CLM presentation, admins must create Content_Group_Content_vod records for the presentation and each of its associated key messages.

> **Note:** Sub-presentations are treated the same as CLM presentations and Shared Resources are treated the same as key messages. Admins must create Content_Group_Content_vod records for a sub-presentation and its key messages, as well as for a Shared Resource. Veeva recommends data loading Content_Group_Content_vod records for key messages (including Shared Resources) first, followed by CLM presentations (including sub-presentations).

  - Create **Content_Group_Content_vod** records with the **CLM_Presentation_vod** record type and populate at least the following fields:
    - Content_Group_vod - lookup to the Content_Group_vod record, usually the External ID of the content group
    - CLM_Presentation_vod - lookup to the CLM_Presentation_vod record
    - Record_Type_Name_vod - CLM_Presentation_vod

- For each key message in a CLM presentation, create **Content_Group_Content_vod** records with the **Key_Message_vod** record type and populate at least the following fields:
    - Content_Group_vod - lookup to the Content_Group_vod record
    - Key_Message_vod - lookup to the Key_Message_vod record
    - Record_Type_Name_vod - Key_Message_vod

Creating and Managing Content Alignment using Align and CRM

Customers can use Align to manage content groups and users. The content assigned to each content group is managed in CRM.

To align content using Align and CRM:

1. Create content groups and assign users in Align. Admins in Align manually create content groups and the users are automatically assigned to each group based on territory assignments. Admins then sync the content groups and users to CRM. In CRM, Content_Group_vod and Content_Group_User_vod records are automatically created and linked based on the content groups synced from Align.

    > **Note:** When a user is moved from one territory to another, the content groups to which they are assigned are also updated accordingly.

2. Sync the content groups and users from Align to CRM.
3. Assign content to each content group.
    - To assign Approved Email content, create **Content_Group_Content_vod** records with the **Approved_Document_vod** record type and populate at least the following fields:

- Content_Group_vod - lookup to the Content_Group_vod record, usually the External ID of the content group
- Approved_Document_vod - lookup to the Approved_Document_vod record
- Record_Type_Name_vod - Approved_Document_vod

- For a CLM presentation, admins must create Content_Group_Content_vod records for the presentation and each of its associated key messages.
  - Create **Content_Group_Content_vod** records with the **CLM_Presentation_vod** record type and populate at least the following fields:

    > **Note:** Sub-presentations are treated the same as CLM presentations and Shared Resources are treated the same as key messages. Admins must create Content_Group_Content_vod records for a sub-presentation and its key messages, as well as for a Shared Resource. Veeva recommends data loading Content_Group_Content_vod records for key messages (including Shared Resources) first, followed by CLM presentations (including sub-presentations).

    - Content_Group_vod - lookup to the Content_Group_vod record, usually the External ID of the content group
    - CLM_Presentation_vod - lookup to the CLM_Presentation_vod record
    - Record_Type_Name_vod - CLM_Presentation_vod

- For each key message in a CLM presentation, create **Content_Group_Content_vod** records with the **Key_Message_vod** record type and populate at least the following fields:
  - Content_Group_vod - lookup to the Content_Group_vod record, usually the External ID of the content group
  - Key_Message_vod - lookup to the Key_Message_vod record
  - Record_Type_Name_vod - Key_Message_vod

Creating and Managing Content Alignment using CRM and Vault

Customers can use Vault to manage the content assigned to each content group. Content groups and users must be created and managed in CRM.

To align content using CRM and Vault:

1. Define content groups. Create **Content_Group_vod** records with the **Content_Group_vod** record type and populate at least the following fields:
   - Name - name of the group
   - Status_vod - Active. Set to Inactive when deactivating but not deleting a content group. Approved_Document_vod__Share, CLM_Presentation_vod__Share, and Key_Message_vod__Share records for all content are deleted and users no longer have access to that content.
   - External_Id_vod - unique ID of the group

   > **Note:** Define a naming convention and use optional fields, for example, Country_vod, Description_vod, and Language_vod, to provide additional context for the content group, which may be useful across teams.

2. Assign users to each content group. Create **Content_Group_User_vod** records with the **User_vod** record type and populate at least the following fields:
   - Content_Group_vod - lookup to the Content_Group_vod record, usually the External ID of the content group
   - User_vod - lookup to the User record
3. Sync the content groups to Vault via the CRM Vault Metadata Sync in CRM. Content groups cannot be created directly in Vault.
4. Assign content to content groups.
   - To assign Approved Email content to a content group, content admins in Vault can select one or more content groups for the **crm_content_groups__v** field on an Email Template or Email Fragment, or on an auto-published document.
   - To assign CLM content to a content group, content admins can select one or more content groups for the **crm_content_groups__v** field on a Multichannel Presentation or on an auto-published document.

   > **Note:** If admins add more content groups to the source document of an auto-published document, the auto-published document must be generated again to include the additional content groups.
5. Sync content from Vault to CRM.
   - When CRM admins sync Approved Email content from Vault to CRM via the Approved Email Admin Console, Content_Group_Content_vod records are automatically created for each Approved_Document_vod record assigned to a content group and linked to the appropriate Content_Group_vod records via the Content_Group_vod lookup field.

- When CRM admins sync CLM content from Vault to CRM via the CLM Admin Console, Content_Group_Content_vod records are automatically created not only for each CLM_Presentation_vod record assigned to a content group, but also for each of its associated Key_Message_vod records, including shared resources, and sub-presentations. These records are automatically linked to the appropriate Content_Group_vod records via the Content_Group_vod lookup field.

CRM admins can view the content alignment successes and failures from the last seven days in the Content Alignment Process History sections in the CLM Admin Console and Approved Email Admin Console. Admins receive notification emails after each sync with information about the successes and failures.

> **Note:** Admins must use the CLM Admin Console to manage CLM content alignment and the Approved Email Admin Console to manage Approved Email content alignment.

Creating and Managing Content Alignment using Align, CRM, and Vault

Customers can use Align to manage content groups and users, and Vault to manage the content assigned to each content group. CRM admins manage the integrations between Align and CRM, and CRM and Vault.

To align content using Align, CRM, and Vault:

1. Create content groups and assign users in Align. Admins in Align manually create content groups and the users are automatically assigned to each group based on territory assignments. Admins then sync the content groups and users to CRM. In CRM, Content_Group_vod and Content_Group_User_vod records are automatically created and linked based on the content groups synced from Align.

> **Note:** When a user is moved from one territory to another, the content groups to which they are assigned are also updated accordingly.

2. Sync the content groups and users from Align to CRM.
3. Sync the content groups to Vault via the CRM Vault Metadata Sync in CRM. Content groups cannot be created directly in Vault.
4. Assign content to content groups.
   - To assign Approved Email content to a content group, content admins in Vault can select one or more content groups for the **crm_content_groups__v** field on an Email Template or Email Fragment, or on an auto-published document.
   - To assign CLM content to a content group, content admins can select one or more content groups for the **crm_content_groups__v** field on a Multichannel Presentation or on an auto-published document.

   > **Note:** If admins add more content groups to the source document of an auto-published document, the auto-published document must be generated again to include the additional content groups.

5. Sync content from Vault to CRM.
   - When CRM admins sync Approved Email content from Vault to CRM via the Approved Email Admin Console, Content_Group_Content_vod records are automatically created for each Approved_Document_vod record assigned to a content group and linked to the appropriate Content_Group_vod records via the Content_Group_vod lookup field.
   - When CRM admins sync CLM content from Vault to CRM via the CLM Admin Console, Content_Group_Content_vod records are automatically created not only for each CLM_Presentation_vod record assigned to a content group, but also for each

of its associated Key_Message_vod records, including shared resources, and sub-presentations. These records are automatically linked to the appropriate Content_Group_vod records via the Content_Group_vod lookup field.

CRM admins can view the content alignment successes and failures from the last seven days in the Content Alignment Process History sections in the CLM Admin Console and Approved Email Admin Console. Admins receive notification emails after each sync with information about the successes and failures.

> **Note:** Admins must use the CLM Admin Console to manage CLM content alignment and the Approved Email Admin Console to manage Approved Email content alignment.

Using Content Groups

When end users in a content group sync Approved Email and CLM content to their devices, only the content assigned to their content group syncs to their devices. My Setup Products for users apply.

Realigning Content Alignment

Admins can realign content alignment from the Content Alignment Process History sections of the CLM Admin Console or the Approved Email Admin Console to fix discrepancies in content alignment object records.

Realigning content recreates the necessary Group, GroupMember, and __Share (Approved_Document_vod__Share, CLM_Presentation_vod__Share, Key_Message_vod__Share) records for content alignment. For example, an admin accidentally deletes a GroupMember record automatically created in Salesforce corresponding to a Content_Group_User_vod record. The admin cannot recreate the record, so they realign content to ensure the record exists again.

Admins receive email notifications when realignment jobs successfully complete or fail with errors.

Defining the Language of Approved Email Content

The Language_vod field on both the Approved_Document_vod and Account objects defines the language of the Approved Email content and the preferred language of the account, respectively.

Content admins can configure these fields to enable Approved Email end users to filter Approved Email content whose language matches the preferred language of the recipient, and vice versa.

End users are alerted if they have selected recipients and content with different Language_vod fields, ensuring that recipients are always sent content in their preferred language.

The Language of Approved Email Content

This Language_vod field on the Approved_Document_vod object is populated during the integration with Vault and CRM. Any edits made to this field in CRM are overridden during the next integration process.

The Language_vod field is a picklist containing the ISO codes for all languages used in Vault. By default, there is only one picklist value, en_US, the ISO code for English. Content admins can add all necessary picklist values and can also set a different default value.

The Language of an Account

The Language_vod field on the Account object represents the preferred language for a specific account and displays next to the account's name when viewing recipients of a composed Approved Email.

The Language_vod field is a picklist containing language ISO codes as values. By default, there is only one picklist value, en_US, the ISO code for English. Content admins can add all necessary picklist values and can also set a different default value.

Customizing Email Header Behavior

Each email template can be configured to have a unique from, reply-to, and sending domain header. You may want specific emails to be from the user (User.Email), and others from a fixed email address, for example always from brand@customer.com. Details on how these values are set by Approved Email Content Admins is in the Approved Email Content Guideline.

Email headers are defined by internet standards, and Veeva complies with these and email authentication standards such as SPF, DKIM, DomainKeys, and SenderID.

The following are functional descriptions of email header values and how they impact the Approved Email experience:

- From Address – this is the email address that displays in the From field in all email clients. This is a required field and is set in Vault on the Email Template document type.
- From Name – this is the descriptive name (for example, first name and last name) that email clients display. Set in Vault on the Email Template and is optional.
- Reply To Address – this is the email address that replies are sent to. This can be different from the From Address. (If not set, replies go to the From Address.) Set in Vault on the Email Template and is optional.
- Reply To Name – this is the descriptive name that email clients will display. This is optional.
- Subject – this is the subject that displays in all email clients. Set in Vault on the Email Template and is required.

- Sending Email Domain – This is the authenticated domain that emails are sent from and is set by the email engine in the <return-path>email header.This is required and can be configured in two ways:
  - Sending Email Domain field on Approved_Document_vod. Set in Vault on the Email Template and is optional. When set in Vault, this value overrides the value set in the Approved Email Setting Approved Email Domain (APPROVED_EMAIL_DOMAIN_vod). This allows a product branded email template to be sent from a brand.com authenticated domain. When NULL, we default to (see below).
  - Approved Email Setting Approved Email Domain (APPROVED_EMAIL_DOMAIN_vod). This is the default when a value is not set on the Email Template. A unique domain can optionally be defined for each user Profile. The common example is for multi-country orgs where the sending domain is different for each country.

In general, sending domains should be the same as the domains used in the from address header. For example, if the from address is user@company1.com, configure the sending domain as company.com. This offers two advantages:

- Email clients do not display a message that indicates a mismatch between these domains. For example, Outlook typically displays this message in the format From user@company1.com on behalf of company2.com. Gmail typically displays it as From user@company1.com via company2.com.
- Slightly higher ability to deliver email directly to the recipient’s inbox

To verify your email domain is set up correctly, we recommend you use Port25. To receive the results in your email address, the address needs to be added to the check-auth address.

For example, to send the results to: jsmith@yourdomain.com, the sample message should be sent to check-auth-jsmith=yourdomain.com@verifier.port25.com.

A reply email is sent back to you with an analysis of the messages authentication status. The report performs the following checks: SPF, SenderID, DomainKeys, DKIM and Spamassassin.

The following are examples of how the From and Reply-to headers can be configured on Email Templates in Vault. For reference, User.Email will use the email address from the User record, User.Name will use the end user's name. This assumes the user’s name is Sarah Jones, and her email address is sjones@company.com.

Example 1

	From Address	From Name	Reply-to Address	Reply-to Name
Example Values	{{userEmailAddress}}	{{userName}}	n/a	n/a

Displays as from: Sarah Jones <sjones@company.com>

Replies go to: Sarah Jones <sjones@company.com>

Example 2

	From Address	From Name	Reply-to Address	Reply-to Name
Example Values	{{userEmailAddress}}	{{userName}}	replies@brand.com	Customer Service

Displays as from: Sarah Jones <sjones@company.com>

Replies go to: Customer Service <replies@brand.com>

Example 3

	From Address	From Name	Reply-to Address	Reply-to Name
Example Values	name@company.com	{{userName}}	n/a	n/a

Displays as from: Sarah Jones <name@company.com>

Replies go to: Sarah Jones <name@company.com>

Example 4

Note: The following example requires a force.com inbox setup in your org. It requires custom Apex code to manage and route the inbound email replies. But it allows customers to manages replies within salesforce and maintain a conversation thread.

	From Address	From Name	Reply-to Address	Reply-to Name
Example Values	name@company.com	Company Mailbox	inbox@salesforce.com	{{userName}}

Displays as from: Company Mailbox <name@company.com>

Replies go to: Sarah Jones inbox@salesforce.com

Filtering Approved Email Fragments

iPad|Browser|

Content admins can enable additional filters when selecting a fragment to add to an Approved Email, enabling end users to more easily find and select content. All picklist and Boolean fields can be configured as filters. Product_vod, a lookup field, is also supported.

Note: Multi-select picklists are not supported as filters.

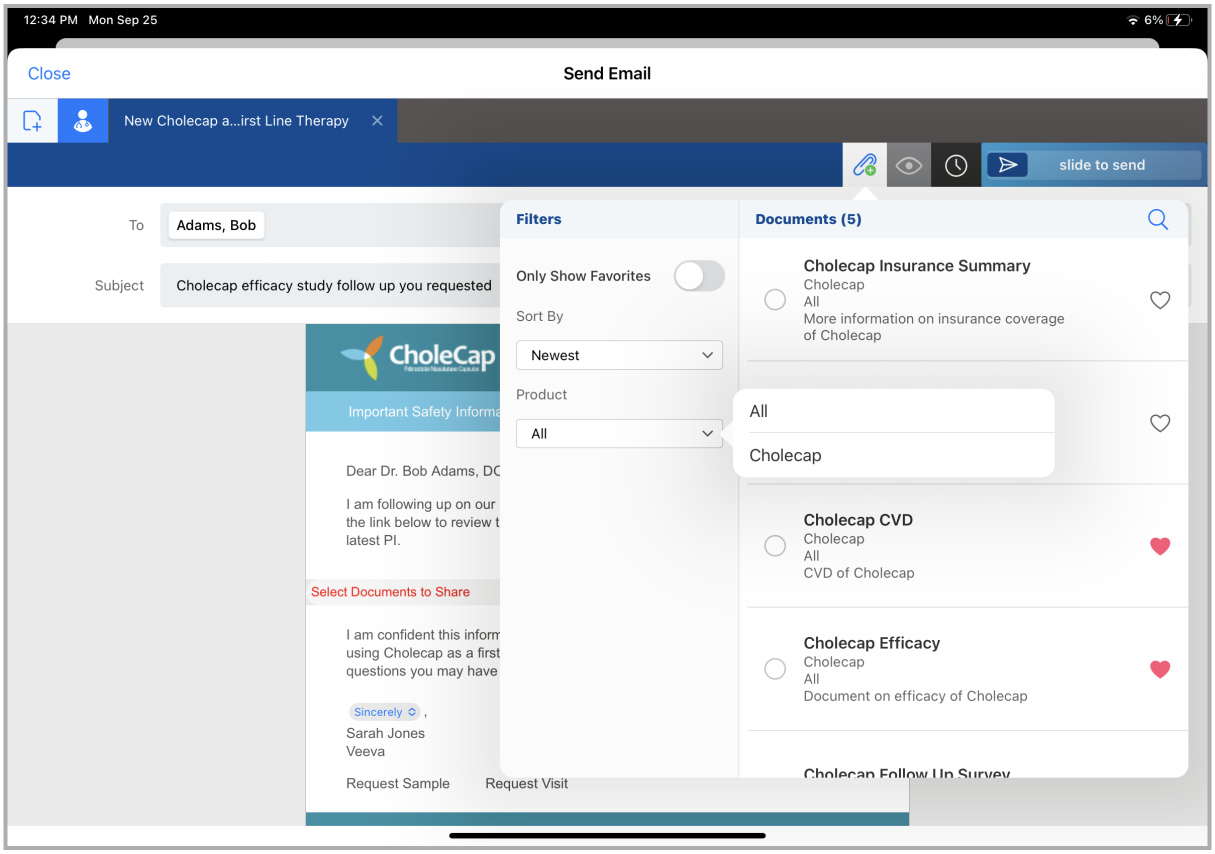
For example, the admin configures the Country_vod field as a filter for the Approved_Document object. When Sarah Jones composes an Approved Email to send to Clinton Ackerman, she selects Add Document and is able to filter the list of fragments to only display ones with a Country_vod of United States.

Adding Approved Document Fields as Filters

To add fields as filters on the Add Document page:

1. Navigate to the **APPROVED_EMAIL_FILTER_FIELDS_vod** Approved Email setting.
2. Navigate to the Veeva Message referenced in the setting. The default Veeva Message is APPROVED_EMAIL_FILTER_FIELDS;;ApprovedEmail.
3. Add the appropriate Approved_Document_vod fields using a double semi-colon delimited list.

   For example: **Country_vod__c;;Region_Type__c;;Product_vod__c**.
4. Ensure end users have at least FLS read permission for all referenced fields.



Preventing Approved Email Content from Displaying

Browser|iPad|iPhone|

To prevent certain email templates and email fragments from displaying to users as options to select when composing emails, content creators can mark the Approved Email content as hidden. Email Templates and Email Fragments marked as hidden still display when accessed directly, for example, when launched from CLM to send an email or share dynamic content, or when used for Recommended Emails.

Configuring Hidden Approved Email Content

In Vault, configure the following:

1. Grant the integration user Read field permission to the **Hide from CRM Library (crm_hidden__v)** check box field on the Email Template and Email Fragment document types.
2. Add the **Hide from CRM Library (crm_hidden__v)** field to the Email Template and Email Fragment document types.

In CRM, configure the following users:

1. Grant Approved Email integration users the following permissions:

Object	OLS	Record Types	Fields	FLS
Approved_Document_vod	CRU	• Email_Fragment_vod • Email_Template_vod	Hidden_vod	Edit

2. Grant end users the following permissions:

Object	OLS	Record Types	Fields	FLS
Approved_Document_vod	R	• Email_Fragment_vod • Email_Template_vod	Hidden_vod	Read

3. Navigate to **Approved Email Administration tab > View Mapped** in the Vault Connection Management section.

4. Select **Compare CRM to Vault** to update the mapping for the Hidden field.

Preventing Approved Email Content from Displaying

Content creators can select the Hide from CRM Library (crm_hidden__v) field on Email Templates and Email Fragments when creating content in Vault. When the content syncs to CRM, this field maps to the Hidden_vod field on the corresponding Approved_Document_vod records.

When the Hidden_vod field is checked for an email fragment, it is excluded from all entry points where users can select fragments.

When the Hidden_vod field is checked for an email template, the template does not display in the Send Email screen when users compose Approved Emails from the following entry points:

- Accounts
- Calls
- CLM
- MyInsights
- Suggestions

Setting Consent at the Email Template Level

iPad|Browser|

Content admins can control whether consent needs to be checked when using specific Approved Email Templates. This provides greater control when determining when consent is checked.

For example, Sarah Jones organizes an Engage meeting with Dr. Clinton Ackerman and sends an Approved Email with information regarding the meeting. The administrator configures the email template Sarah uses to always check for consent. Sarah has not captured consent from Dr. Ackerman, so she is blocked from sending this email and is prompted to capture consent from Dr. Ackerman before sending the email.

Defining Consent for Email Templates

To set consent check requirements for an email template in Vault:

1. Navigate to the appropriate email_template__v record.
2. Populate the **Check Consent** picklist with the appropriate value:

   > **Note:** The Check Consent picklist is empty at initial configuration. When this picklist is empty, it behaves as if Default value is selected.

   - Yes – The template always checks for consent regardless of the entry point
   - No – The template never checks for consent regardless of the entry point. If the template is sent to an account with an Approved_Email_Opt_Type_vod field of Never, the template still does not check for consent.
   - Default – The template checks for consent based on the behavior of the relevant Approved Email entry point

   The following entry points do not check for consent when Default is selected:

- Engage
- Medical Inquiries
- Case
- Receipts
- Double Opt-in

3. Select **Save**.
4. Sync with Veeva CRM.

Receipts and Double Opt-In emails always send without checking for consent, regardless of the value of the Check_Consent_vod field.

Setting the Check Consent picklist to **Yes** means the system checks if consent is required to send the email. It does not mean consent is needed to send the email. For example, if a template with the Check Consent picklist set to **Yes** is sent to an account whose Consent Type is Opt-in Not Required, the email can be sent even though consent was not captured.

Note: Do not edit the Consent_Check_vod field in Veeva CRM as any changes are overridden when the next sync occurs.

Restricted Words in Approved Email

iPad|Browser|

Content admins can specify a list of words that, if entered, prevent end users from sending the email. Restricted words should be treated as a partial string match or an exact string match. Additionally, administrators can define more restricted words with multiple Veeva Messages. This provides greater control over what words or phrases should be restricted and helps minimize unnecessary restrictions.

For example, while Sarah Jones is writing an Approved Email, she types the word Cholecap. An error message displays because the word cap is a restricted word using a partial match.

Defining the List of Restricted Words

To define restricted words:

1. Navigate to the Veeva Message noted in the **Approved Email Restricted Words** Approved Email Setting.
2. Select **Edit**.
3. Enclose **exact string matches** in straight double quotes (""). Smart Quotes are not supported (“”). Partial string matches should not use double quotes.

   For example, the following text input into the Veeva Message: awesome;;"10 dollars" sets the word awesome as a partial string match and the phrase 10 dollars as an exact string match.

> **Note:** Spaces, newlines, tabs, and all other forms of whitespace are treated the same.

Exact string matches immediately after punctuation are restricted based on the specific language and platform. For example, the Online and Windows Tablet platforms always restrict exact string matches that follow punctuation. On the iPad platform, this restriction is dependent on whether the language of the device regularly contains punctuation preceding a word (for example, Spanish uses the ¿ punctuation before words).

Using Multiple Veeva Messages to Restrict Words

Administrators can define the list of restricted words as a series of Veeva Messages. This enables a list of restricted words larger than the 5000 character limit of a Veeva Message:

1. Create all appropriate Veeva Messages containing lists of restricted words.

   > **Note:** Veeva Messages must be a unique combination of the Name, Category, and External ID fields.

2. Navigate to the **Approved Email Restricted Words** Approved Email Setting.
3. Enter the Veeva Messages as a comma-separated list. All Veeva Messages in this setting must belong to the same category and use the format [Name1],[Name2],[Name3];;[Category].

   For example, the following references three Veeva Messages for the list of restricted words: RESTRICTED,RESTRICTED2,RESTRICTED_jp;;AE

> **Note:** All Veeva Messages used must have the same Language field.