Veeva Approved Email Technical Handbook

The latest version of this document is always available here.

Quick Access Job Aids

- How to Load content into Vault
- Supported Token Reference List
- Link Tracking techniques
- Linking to Vault
- Frequently Asked Questions
- Agency Training Video

VERSION CONTROL PAGE

The latest version of this document is always available here.

Ver	Revision Date	Revision Author	Summary of Changes
1.0	20-Nov-2015	Veeva	Initial
1.x	20-Dec-2016	Eric Leserman	See previous version of document for details.
2.0	05-Dec-2017	Chris Brown	Version revision to reflect change of ownership. Multiple changes relating to: Australia Release; GCCP R4 unsubscribe links; BEE Email Editor; Veeva 17 Releases
2.1	08-May-2018	Chris Brown	Minor Revision for 18R1
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2.3	15-Sep-2018	Chris Brown	Updated to include links to videos.
2.4	06-Dec-2018	Chris Brown	Clarity of the different unsubscribe links; Added guidance on Proof Renditions; Added clarity of the Fragment Generator;
2.5	Feb-2019	Chris Brown	Added CRM product; Added Section on CRM Publishing; Added section on Related Piece.
2.6	11-Jun-2019	Chris Brown	Replaced CFG10 with PF1. Changed Reviewer terminology to Gatekeeper. New fields added to VAE.
2.7	05-Aug-2019	Chris Brown	Made CRM Product Mandatory and Indication optional. Removed ##username## from supported dropdown tokens
2.8	25-Nov-2019	Chris Brown	Support for {{AppDocId}} token. More guidance on Restricted Words. MLR Approved Piece. New classification fields.
2.9	30-Mar-2020	Chris Brown	Added support for Engage (US Only). Expanded Lilly Passport Section increase scope to all IBU countries.
2.10	24-Aug-2020	Chris Brown	Added support for Remote Consent Capture (OUS only)
2.11	15-Oct-2020	Chris Brown	Added Territory alignment criteria.

Ver	Revision Date	Revision Author	Summary of Changes
2.12	10-Dec-2020	Chris Brown	Added Appendix and FAQs to help with MLR Approved Piece adoption
2.13	08-Jun-2021	Gowra Vallipalli	Added Veeva Engage and Zoom token ({{insertEngageAndZoomJoinURL[Language Code]}}).
2.14	17-Jun-2021	Gowra Vallipalli	Added a note about the status of the Piece document when attached to the 'Related Piece', 'Other Related Documents', 'Related ISI' and 'Related PI' sections on ET/EF.
2.15	5-Aug-2021	Gowra Vallipalli	Added below to the document: 1. Testing process for the Email Template which requires review 2. URL to language codes supported by Veeva

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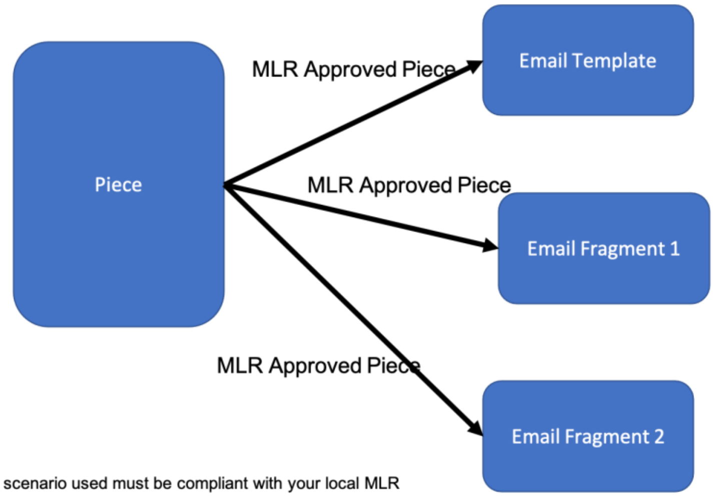
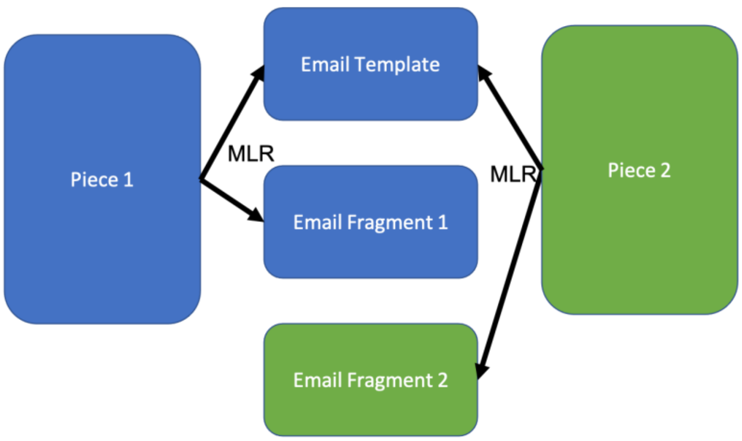


The scenario used must be compliant with your local MLR process.



The scenario used must be compliant with your local MLR process.

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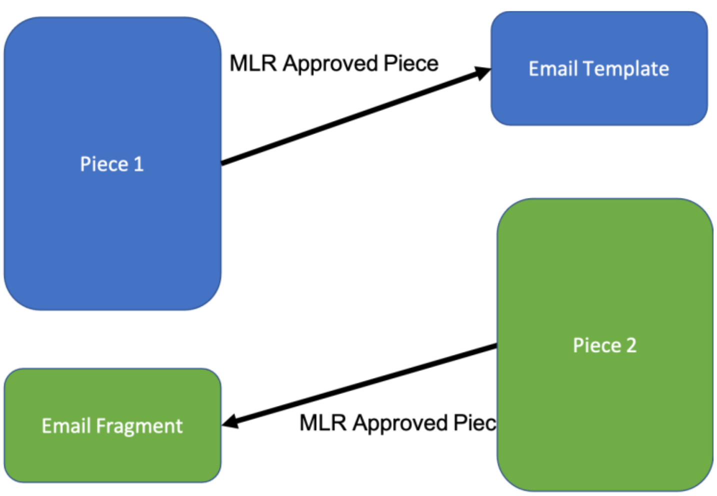

The scenario used must be compliant with your local MLR process.

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Scope and Purpose of this Document

AUDIENCE

This document is intended for any power users, agencies or production partners of Lilly Veeva Approved Email.

It is the Veeva Approved Email leads responsibility to distribute to their local Agency partners.

GUIDELINES FOR ACHIEVING GLOBAL STANDARDS

The purpose of this handbook is to provide guidance to Lilly's Agencies and Partners regarding the global standards for creation, review and approval of Approved Email content for use at Lilly.

By setting clear expectations for what is required in terms of process and procedures, all stakeholders (including marketers, content creators, and content reviewers and approvers) can better focus on evaluating content effectiveness as opposed to coordinating the content-creation process.

This approach achieves significant strategic benefits for Lilly, but also allows the flexibility to serve the unique needs of Lilly geographical regions, brands, field teams and agencies.

This document is intended to reflect general standards and best practices that can be leveraged on a global basis.

When required to do so, Agencies and Partners should defer to and apply local guidance.

AGENCY MINIMUM REQUIREMENTS

It is recommended that at minimum we should use only agencies with a Multichannel Content Partner Certification for Veeva Approved Email. Learn more.

ADDITIONAL SUPPORT

If after you consult this document you still have questions, concerns or in need of support: please contact our 24/6 Helpdesk on VeevaApprovedEmail_helpdesk@lilly.com

Section 1: Foundation Concepts

As a precursor to the development and technical guidance in this document, following are high-level descriptions of the key concepts and components of Lilly's Approved Email and Vault Content Management Systems:

- Templates and Fragments
- Promotional Materials
- Vault
- Opt-in and Opt-out Subscription Models

OVERVIEW OF TEMPLATES AND FRAGMENTS

Each Approved Email sent though the Veeva Approved Email platform will include several important elements. The most important elements are the Email Template and the Email Fragment. The Email Template is a PMAP approved email shell. The template can be personalized by the rep prior to sending to an HCP by adding specific Email Fragments to the Template. The Email Fragment is a specific message element that has been PMAP approved to be inserted within a specific Email template.

Each element used in an email will be required to be submitted, reviewed and approved through the Promotional Material Approval Process (PMAP).

As an example, consider the primary message of an email template as outlined below:

Example Email Template Content

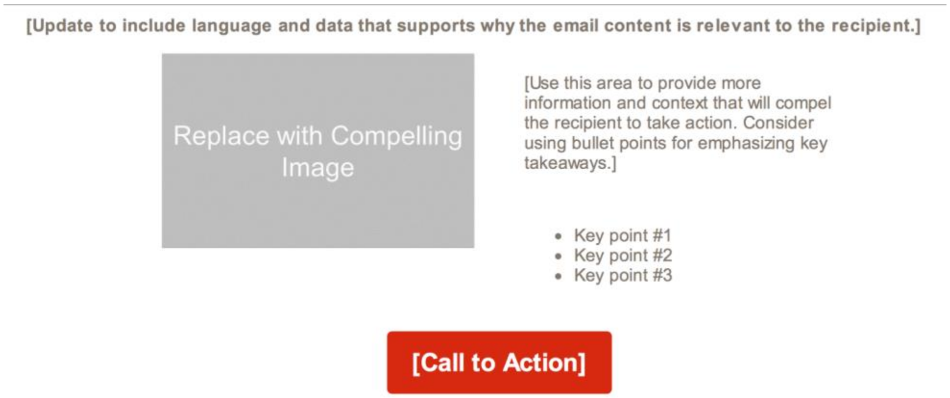
This basic content is then often paired with several appropriate and PMAP approved Email Fragments that can be inserted in the Email by the representative.

When approving the Template you must include:

- the Fragments that can be used with a particular template
- any restrictions on the minimum and maximum number of fragments
- any other limits to which fragments can be used.

It is important to get local PMAP guidance on how best to PMAP Veeva Approved Email.

Fragment Example



Templates should be standardized, to the extent practical, in accordance with the elements required for each email, such as links to look and feel, prescribing information, Email Opt-Out, Applicable Safety Information, and other important standard information as defined by any local requirements and/or policy. This approach reduces the effort needed to ensure a basic compliance standard for Agencies and Partners, as well as the effort needed by the approval team to shape these standard compliance elements. These content components and the associated best practices are discussed in detail in subsequent sections of this document.

PROMOTIONAL MATERIALS (PIECES)

An Approved Email can contain links to content stored in the Veeva Vault. The content in Vault would be the latest approved version of the Document that is stored in Vault and available for viewing by HCP's. Some examples of content types include PPTs, PDFs, Videos, Static images, and PNG versions of word and excel documents.

Linking to content that is housed in Vault ensures that the HCP is always viewing the latest version of the content and is not able to view or send out dated email attachments to colleagues. Promotional Materials will be discussed in multiple development and loading contexts in this document.

Approved emails are not limited to linking to only vault material. It can also link to any content on any website in accordance with local policy.

VEEVA VAULT (VVPM)

Veeva Vault is Lilly's Content Management repository for Approved Email and other items that will be viewed within or accessed from an email.

All content is loaded and maintained in Vault and is pulled to CRM via an automated synchronization process. Vault maintains a record of all versions of a particular document and ensures that only the most recent approved version of that document is available to be sent or viewed from an email or from a link within an email.

Vault and the loading of content will be further discussed in detail in this document.

Flow between systems

STAGING ENVIRONMENT (PF1)

PF1 is a separate staging environment for agencies and Power users to test their content within a Lilly environment before submitting for Brand approval.

Testing content will be further discussed in detail in this document.

NOTE: PF1 has recently replaced with our previous environment called CFG10.

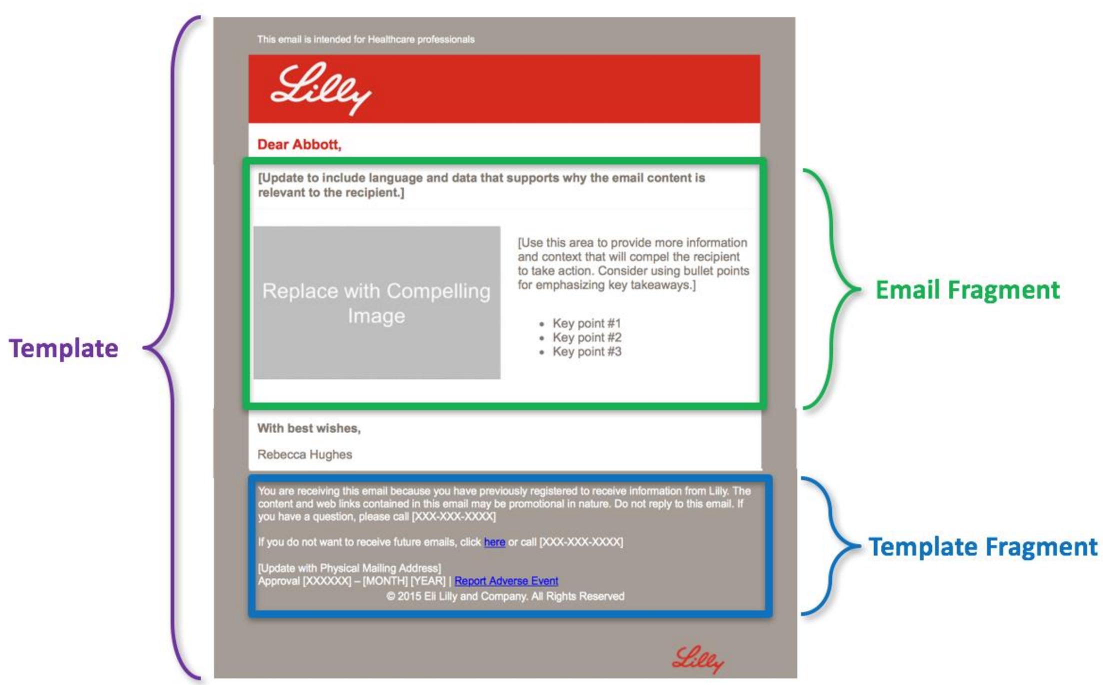
SUBSCRIPTION MODEL (OPT-IN AND OPT-OUT)

The subscription model for Approved Email describes the overall process through which HCP's can elect to receive, or not receive, email from the representative. While specific processes may vary based on local law and policy, only the technical implementation will be discussed in this document.

Section 2: Email Design

Approved Emails are made up of Email Templates, which always includes the standard email framework and brand or product level required elements, and may contain Email Fragments, which contain specific information or messages. Fragments can be thought of as small, modular, elements that can be selected and inserted in the email by the representative.

Below is a simple wireframe example of a Template with a Fragment, and a Template Fragment. These elements will be outlined in more depth on the following pages.



EMAIL TEMPLATES & FRAGMENTS

Email Templates and Fragments are made available to representatives based on their product and team alignments. Representatives can then choose which specific template and fragments they wish to send to an HCP based on the intended interaction.

E-mail templates are limited to 100,000 characters each.

See appendix for some common design suggestions

EMAIL ASSETS

Each Email Template or Fragment that require of associated graphics must include an assets package (e.g., a .Zip file). This package is associated with the particular content item record in Vault. It is created by zipping the images, including the required folder structure.

The steps in the Content Loading process including how to associate assets to a Template or Fragment are reviewed in a later portion of this document.

COMMON REPRESENTATIVE CUSTOMIZATION OPTIONS

SUBJECT LINES

The text of a subject line is determined by the Email Template record in Vault. A subject line may be:

- A hard-coded text phrase that is always used for that Email Template.
    - The text is entered directly into the Subject field.
- A selectable list of pre-approved subject lines that can be selected by the rep for that specific Email Template.
    - Using {{customText[Subject 1|Subject 2]}}
        - Each selectable subject must not be greater than 255 characters
        - In total there is 1500 characters that can be distributed by selectable subjects. *E.G 5 subjects of 255 can be created.*
- A prepopulated Free Text field that can be changed by the Rep.
    - Using {{customText(140|Default Text)}}

All subject must go through the PMAP review along with the Template.

Other tools

- For subject lines- there are a number of online sites that discuss best practices for subject lines- http://kb.mailchimp.com/campaigns/previews-and-tests/best-practices-for-email-subject-lines https://www.campaignmonitor.com/blog/post/4210/power-words-in-email-subject-lines https://www.campaignmonitor.com/blog/post/4042/effective-words-in-subject-lines https://litmus.com/blog/tag/subject-line
- A useful tool for the subject line checker can be found at: https://litmus.com/resources/subject-line-checker

USE OF CONTENT MERGE TOKENS

There are many content tokens available for developers to use in creating Email Templates. These tokens are used to pull appropriate data from the CRM database and insert those values into the email at the location specified by the agency in the design of the content.

This feature is commonly used personalize an email with the Last Name of the Professional in the greeting (Dear Dr. {{accLname}}) and to insert the name of the representative that is sending the email. (Sincerely, {{userName}}).

A full list of standard tokens can be found in the appendix section of this document.

REPRESENTATIVE SELECTABLE HTML PULL DOWNS

Selectable HTML Pull Downs are often used for items like titles (Dr., Mr. Ms., etc.), but can also be used for a range of customization options.

E.G {{customText[Dr|Mr|Mrs]}}

A further details on the constraints of {{customText}} can be found in the appendix section of this document.

REPRESENTATIVE FREE TEXT AND RESTRICTED WORDS

Rich text and plain text boxes can be made available to the rep to enter their own text to the body of the email. The specific location for the free text in the Email Template is determined by positioning either the {{customRichText}} or {{customText}} tokens within the HTML of the Email.

A list of restricted words can be created, to identify words that cannot be included in a free text by the representative. Consult the local CRM team if restricted words are to be utilized.

Check your local policy on Rep ability to use free text before designing free text into your email.

The following techniques can be used within a restricted word list:

- Each word must be separated by ;;
- Use of straight double quotes ("") for exact string matches
    - E.G "ion";; would not match against restriction but would ION.
- Words without "" will still match within words.
    - E.G ion;; would match against restrict**ion**
- The **{{DetailProduct}}** token can be added as a word, to automatically include all Detail product names within Veeva CRM as restricted words. This would Include new products as they are created.
    - E.G {{DetailProduct}};; would match against Taltz, Verzenio etc

TRACKING LINKS WITHIN AN EMAIL

Templates and Fragments can contain hyperlinks to any web accessible page including Vault documents.

The following URL tracking techniques can be used for tracking of link clicks within google Analytics and/or Email Reporting Hub.

- All links to Lilly websites must contain a campaign ID using the parameters required by your web analytics engine (Google Analytics) to allow for continuity between Veeva and Web analytics.

  Code example:

  https://www.veeva.com/?utm_source=VAE&utm_medium=email&utm_campaign=TrulicityFragment1"

- The {{AppDocId}} token can be added to the <a> tag in the Email Template or Fragment to indicate which Document the link was associated with.
  - {{AppDocId}} will be replaced with a unique Salesforce ID of the document in which the link was clicked.
    - If the link resides within a fragment the ID of the fragment will be returned.
    - If the link resides within the template then the ID of the Template is returned.

  Code example:

   Click Here. .

- The LinkName parameter can be used to name links within an Approved Email. When added to the URL with a custom identifier the link clicks will be tracked by Veeva and ERH.

  Code example:
   Click Here. .

LINKING VAULT DOCUMENTS

Links to documents stored in Vault (typically PDFs or videos) can be shared within Email Templates or Fragments. Shared Documents at Lilly must be a "promotional materials" also known as a "Piece".

- Only affiliates that are using Veeva Vault to manage their promotional material approval process will have access to the "Piece" document type.

- The Promotional Material must be added as an '**Other Related Document**' in the Email Fragment/Template.

- The link can then be coded into HTML of the Template or Fragment by adding the special token {{$######}} to the html. Where ##### is replaced by the

Document ID. This can be identified from the URL of the document.

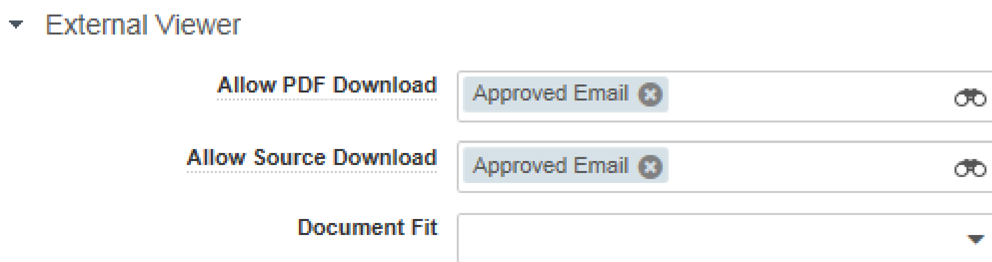
  - For example, the number highlighted in red below is the doc ID: https://lillypromomats.veevavault.com/ui/#doc_info/49393/1/0
  - Then the resulting token would be {{$49393}}
  - E.G Vault Link

- When the email is sent the token will be replaced by a hyperlink to the document.

- The names of these documents will be visible to the HCP ("Name" metadata field), so please adhere to local guidance when naming the documents.

- HCPs can be allowed to download promotional materials either in their source format or PDF. This is enabled by:

  - Go to the "External Viewer" metadata field (on promotional material) and select "Approved Email" for "Allow PDF Download" and/or "Allow Source Download".

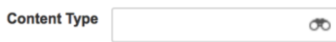


Promotional Material attached to the 'Related Piece', 'Other Related Documents', 'Related ISI' and 'Related PI' sections on the Email Template/Email Fragment must be in the "Approved for Distribution" state to send email from staging environment PF1 and Production. Else the sent email will be failed.

UNSUBSCRIBE LINK

The global design requires that GCCP unsubscribe links must be used for all Veeva Approved Emails.

A GCCP unsubscribe link can be acquired by **consulting with your local contact.** Ensure that the opt out entitlement matches that of the Content type Template meta data.



The standard {{unsubscribe_product_link}} token is not supported in any configurations.

GCCP links containing tokens encapsulated with a double %% are not compatible with Veeva Approved Email. E.G %%emailaddr%%

The table below documents any agreed exceptions:

Country	Link / Token
JP	{{unsubscribe_product_link[,Lilly_JP_Japanese]}}
US	Hibbert direct links. Consult Hibbert specialist.

ADVANCED REPRESENTATIVE SIGNATURE OPTIONS

Representatives have the ability to update the following information on their user profile, which can be used to personalize the Email Template.

- Preferred Email Address
- Preferred Name
- Preferred Phone Number

This information can be inserted in the signature using the following tokens:

- {{User.Approved_Email_Email_Address__c}}
- {{User.Approved_Email_Name__c}}
- {{User.Approved_Email_Phone__c}}

Content creators should understand that the ability to use these tokens may vary by local policy.

If affiliates prefer not to allow representatives to identify with their preferred details then the following tokens can be used to pull profile information from CRM:

- {{userName}}
- {{User.Phone}}
- {{userEmailAddress}}

EMAIL FRAGMENTS

Email Fragments are HTML snippets that are designed to be embedded within an Email Template; it is not sent by a user as an email to a recipient on its own. They are designed to link to documents stored in Veeva or to provide links to Web Resources and programs but can be used for other purposes. The advantage of using Fragments is that they represent a small piece of content that a representative can select from a pre-approved list and insert into an email Template. This approach empowers the representative to select the most effective available content to send to a particular HCP. It also can save Lilly money and time as adding more or updated content does not require the updating of each Email Template.

When using Fragments, the Email Template HTML must include a Veeva token {{insertEmailFragments}} to enable the Add Documents button (paperclip icon) on the Send Email page online or in CRM for the iPad. The Add Documents button displays a list of Email Fragments aligned to the Detail Product and to that Template.

{{insertEmailFragments[x,y]}}

The {{InsertEmailFragments}} token can be further customized by:

- x = minimum number of fragments.
- y = maximum number of fragments.

For example: {{insertEmailFragments[0,2]}} is a minimum of 0 and maximum of 2 fragments on the template

The Approved Email platform will insert the representative chosen Email Fragment into the Template before it is sent to the email recipient. It is recommended that the Fragment design match the design of the Email Template. Fragments should not be designed independent of the template. In general, it is best to design an Email Template with the Fragment embedded and then remove the Fragment from the template and save it as another document. This document that contains the Template and its Fragments will be reviewed by the PMAP team prior to approval and distribution to the field.

Key Information:

- Email Fragments are related to Templates through the Product.
- All Fragments for a product are available for all Templates for that product. (If associated on the Template records in vault)
- You can only have one Fragment section per Template. It is not possible to put text or other elements between Fragments in a given Template.
- The current guidance recommendation at Lilly is to limit any email to include only **one** fragment. Fragment/Template combinations must be pre-approved by PMAP. Content creators can build in code in the Template to place minimum and maximum numbers of fragments that can be added to a given Template. Check with local guidance in regards to use of Fragments and minimum and maximum numbers of fragments that can be inserted into any given Template by the representative.

- If a Template has been locally approved to allow the insertion of multiple Fragments, Representatives can choose the Fragments that they wish to include in an email and then specify the order of the Fragments as they would like them to appear in the final email.
- Fragments are limited to 100,000 characters each.

DYNAMIC FOOTNOTES & CITATIONS

Approved Email Fragments may contain medical claims based on various studies – these must be cited with their description and reference(s). Approved Email has the ability to dynamically number and assign the footers and citations on the server and insert them into the bottom of an Email Template. The system supports the following based on industry standard enumeration:

  - Footnotes
  - Citation Summary
  - Citation/References

The following tokens define the content within the Email Fragment that is dynamically assembled on the server.

Token	Description
{{FootnoteSymbol[Sequence Number]}}	Inserts Footnote Symbol. The typical order is *, †, ‡, §, ‖, ¶. For example, {{FootnoteSymbol[1]}} Note: The sequence number is logical and not directly printed to the email. This is to help the designer visually correlate the footnote/citation references in the Fragment to the actual footnotes/citations printed in the footer. If more footnote symbols are needed, the existing symbols can be doubled, tripled in the above order. For example, **, ††, ‡‡, §§, ‖‖, ¶¶.
{{CitationNumber[Sequence Number] }}	Inserts Citation number. These are integers starting from one. For example, {{CitationNumber[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.
{{FootnoteStart}}	Denotes the start of the footnote section.
{{FootnoteEnd}}	Denotes the end of the footnote section.
{{CitationStart}}	Denotes the start of the citation section.
{{CitationEnd }}	Denotes the end of the citation section.
{{CitationSummaryStart}}	Denotes the start of the citation summary section.
{{CitationSummaryEnd}}	Denotes the end of the citation summary section.

The following tokens govern where the dynamically assembled content is inserted in the Email 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.
{{FootnoteEnd}}	Denotes the end of the footnote section.

Note:

- The footnotes and citations will not display to the representative during online/iRep preview of the email to be sent. They are assembled on the server and will display only in the email sent to the HCP.
- Given that the ordering of the footnotes and citations is dynamic and based upon the ordering of associated Fragments, some affiliates may choose not to use this feature. Please check with your local procedures to determine if this content can be presented dynamically or must be explicitly programmed into the email content.
- Because some Email Fragments may contain medical claims, it is important that this information, including studies, descriptions, and other references, be cited, noted, and numbered accordingly.

TEMPLATE FRAGMENTS

Template Fragments do not currently work with GCCP opt out links. Do not use until fix is identified.

A Template Fragment is also a modular snippet of HTML. It is typically used to create a paragraph or footer that is appended to all Email Templates for the same product. For example, you may have a standard disclaimer or ISI statement that must be included at the bottom of every Email Template for a given product. Template Fragments allow you to define the disclaimer once and Approved Email will add the snippet to all outgoing emails that contain the code for the insertion of that specific Template Fragment.

Template Fragments are added automatically. It is not a decision made by the representatives when they send an email in Veeva.

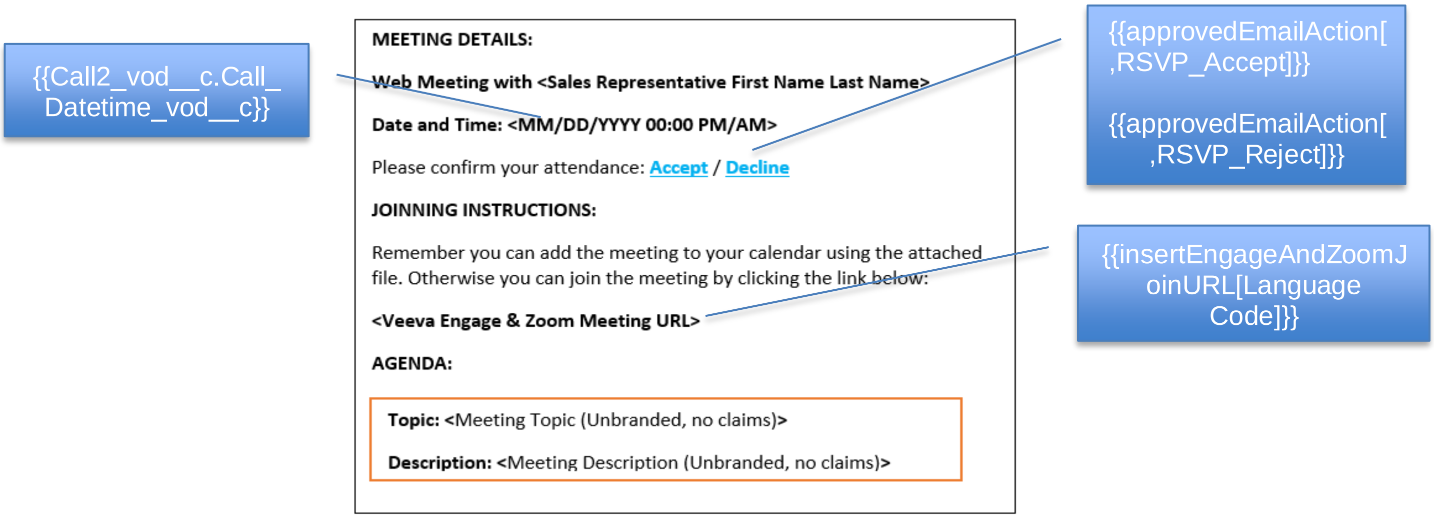
The position of the Email Template is controlled by the position of the {{emailTemplateFragment}} token in the HTML. This HTML must be enclosed within a nested <table> that fits within the overall design of the Email Template.

Within Vault, you can define a specific Template Fragment to include within each Email Template. Only one Template Fragment can be added to a given Email Template.

Template Fragments are limited to 100,000 characters each.

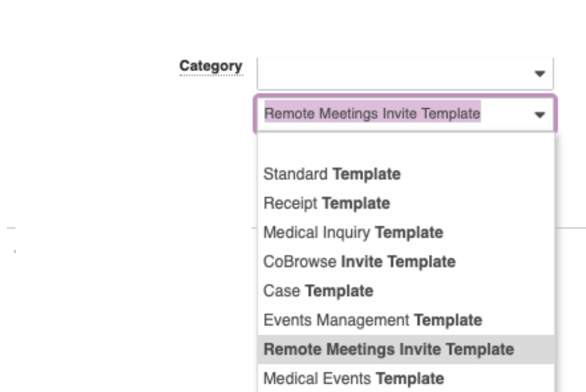
LINKING TO ENGAGE MEETINGS

Approved Email can be used in conjunction with Engage virtual call, as an invitation for HCPs into the virtual call.



The following steps must be completed to leverage this capability:

- **Remote Meetings Invite Template** must be selected under '**Email Template Type'** in the Email Fragment/Template.



- **Invitation – Virtual Call** must be selected under **Email Sub Type** to allow for data identification.

- Special tokens must be coded into the HTML of the Template. Refer to the **STANDARD VEEVA ENGAGE TOKENS** section

Follow the next section on how to test a Engage invitation in staging (PF1)

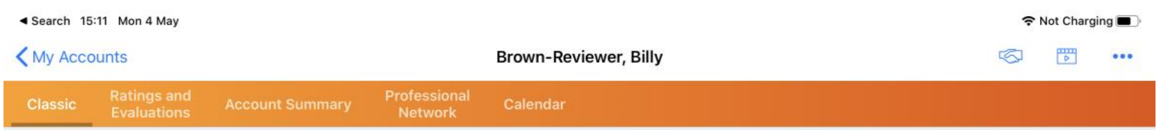
TESTING AN ENGAGE MEETING INVITE IN PF1

Engage Meeting invitations do not appear in the standard List. These templates only display from a scheduled Engage meeting

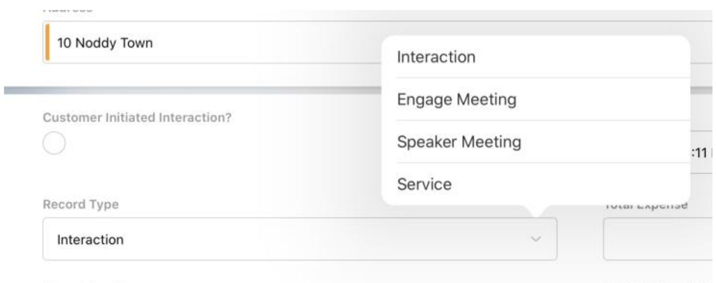
An iPad must be used for Engage invitation testing

1. Find a **Person Account**

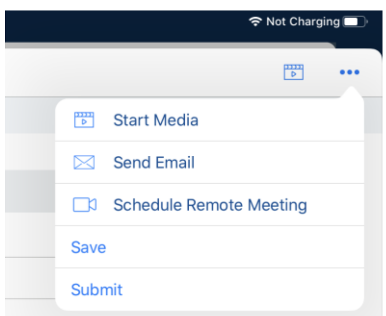
2. Create an **Interaction** (Handshake Icon)



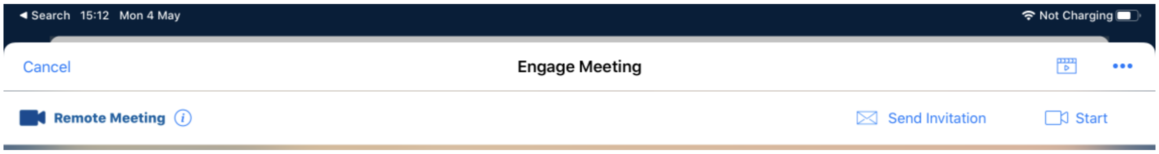
3. Select Record Type of **Engage Meeting**



4. Tap **…** and tap **Schedule Remote Meeting**

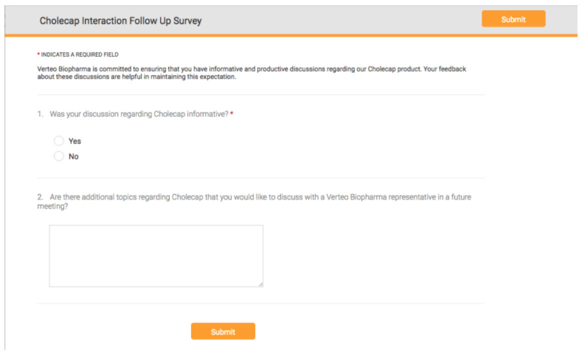


5. Tap **Send Invitation** to open Veeva Approved Email


Search 15:12 Mon 4 May
Not Charging
Cancel
Engage Meeting
Remote Meeting
Send Invitation
Start

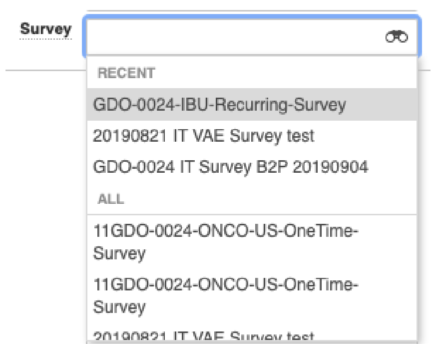
LINKING TO CRM SURVEYS

Approved Email can be another channel for completing CRM Surveys. HCPs can select links embedded in an email to launch a Survey in an iFrame on a Veeva hosted site, helping customers expand their reach and not rely on face-to-face meetings to conduct a survey.



The following steps must be completed to leverage this capability:

- The Survey must be selected under '**Survey** in the Email Fragment/Template.



Before a survey can be linked within an VAE, it must be created with only the Approved_Email_vod channel selected AND be in published. Consult with your local Sales operations.

- The link can then be coded into HTML of the Template or Fragment by adding the special token {{SurveyLink}} to the html.
  - E.G Survey Link

- When the email is sent the token will be replaced by a hyperlink to the Survey.

LINKING TO LILLY PASSPORT

When linking to a Lilly Passport protected digital asset (a website, webinar, video) you can use parameters in the URL to improve the HCPs experience:

- If an HCP doesn't have a Lilly Passport account: it will register the user with what we know about the customer.

- If an HCP has a Lilly Passport account: it can autologin the user.

The GCCP URL builder has been updated to include this functionality.

Autologin can be enabled or disabled based on local requirements. See Table below.

URL Parameters	Description
email={{EmailAddressUnsub}}	This parameter passes Lilly Passport the email address of the customer. The email address used is the address the Veeva Approved Email is sent to. This should not be changed.
cid={{Account.External_ID_vod__c}}	This parameter passes Lilly Passport the Unique ID of the customer. This should not be changed.
al=y	This parameter tells Lilly Passport whether the customer should be auto logged in or not. E.G: • al=y will autologin • al=n will not

Examples:

The link below will either autologin or prepopulate a registration form:

https://www.lillypassport.com/confr-FR?&email={{EmailAddressUnsub}}&cid={{Account.External_ID_vod__c}}&al=y&title=Accueil%20Portail%20Pro%20Lilly%20France&url=https://www.pro.lilly.fr

The link below will only prepopulate a registration form:

https://www.lillypassport.com/confr-FR?&email={{EmailAddressUnsub}}&cid={{Account.External_ID_vod__c}}&al=n&title=Accueil%20Portail%20Pro%20Lilly%20France&url=https://www.pro.lilly.fr

REMOTE CONSENT CAPTURE TEMPLATE

Only currently available for OUS

Veeva CRM can be configured by country to allow consent to be captured remotely. This can support Reps collecting consent when they do not have access to the HCP in person. Once this this is turned on:

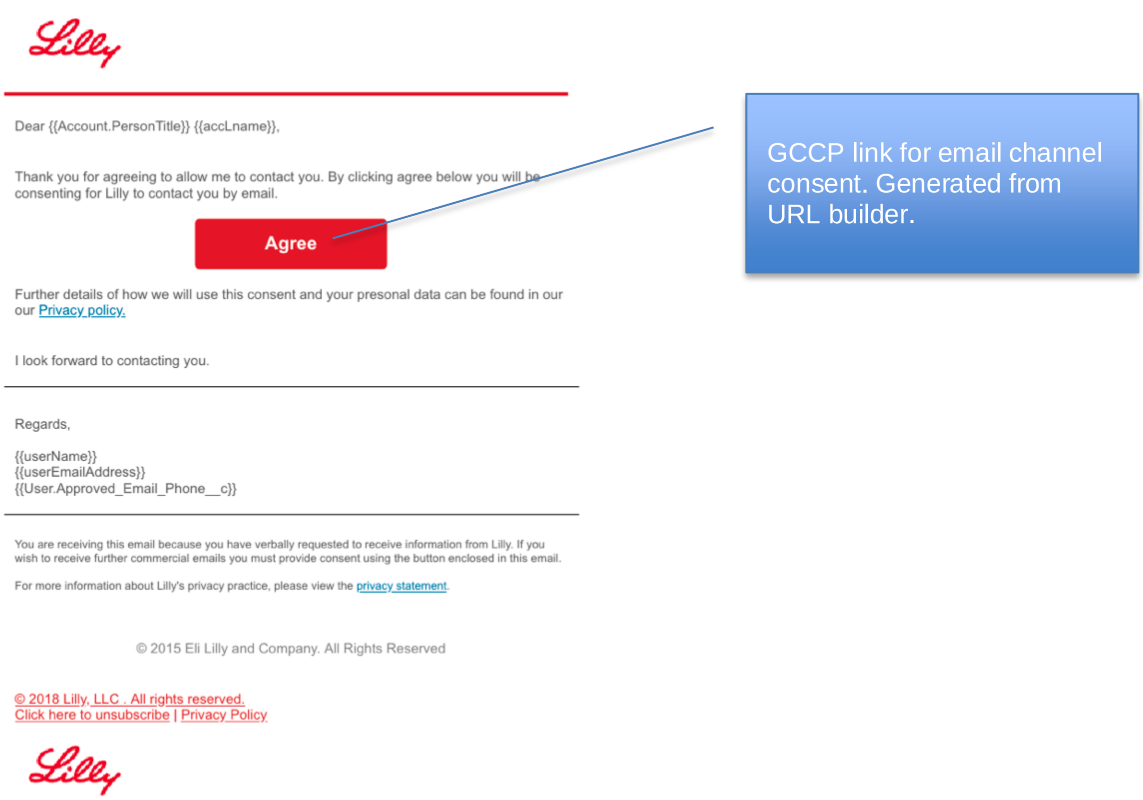
1. An Approved Email Template developed for this purpose, will be automatically sent to a HCP that was identified by the Rep, containing links for them to click if they would like to give consent.

No other emails can be sent until the HCP takes action to this email.

2. If the HCP clicks to give consent, then a consent will be created allowing the Rep to send other emails
3. Otherwise no consent will be created, and no Veeva Approved Emails can be sent.

As this email automatically sends, do not use Dropdowns or free text boxes as there is no opportunity for the rep to customize these.

Here is an example of an email developed for this purpose:


Dear {{Account.PersonTitle}} {{accLname}},

Thank you for agreeing to allow me to contact you. By clicking agree below you will be consenting for Lilly to contact you by email.

Agree

Further details of how we will use this consent and your presonal data can be found in our our Privacy policy.

I look forward to contacting you.

Regards,

{{userName}}
{{userEmailAddress}}
{{User.Approved_Email_Phone__c}}

You are receiving this email because you have verbally requested to receive information from Lilly. If you wish to receive further commercial emails you must provide consent using the button enclosed in this email.

For more information about Lilly's privacy practice, please view the privacy statement.

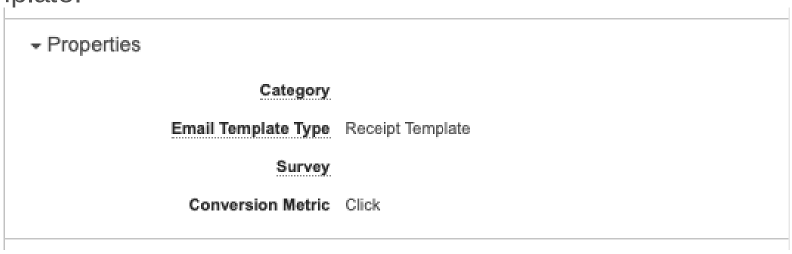
© 2015 Eli Lilly and Company. All Rights Reserved

© 2018 Lilly, LLC . All rights reserved.
Click here to unsubscribe | Privacy Policy

The following steps must be completed to leverage this capability:

- **Language** must reflect the language used in the Template. This language is used by CRM to determine the correct template to send.

- **Receipt Template** must be selected under '**Email Template Type'** in the Email Template.



- **CRM Product** must be a product assessable by all reps at an affiliate. We recommend **Non Brand Email**, as this should already be aligned to all reps at an Affiliate.

- **Department** must include all department available at an affiliate. You should only select Medical if medical was engaged in the design and development process.

- The consent acquisition button **must** use a GCCP opt-in link generated using the URL Builder.

This capability is enabled by country. Once content is created for Remote consent capture, it must be enabled by the Sales Operations using the instructions on the Team GCO site.

TESTING AN REMOTE CONSENT EMAIL IN PF1

It is not possible to test emails of **Receipt Template Type i**n PF1. Use the Standard template type during testing. **But remember** to set it to Receipt Template before approval.

VAE 2.0 FEATURE: EMAIL TEMPLATES THAT REQUIRES REVIEW

This feature is currently enabled only for US Verzenio, Cyramza and Retevmo brands.

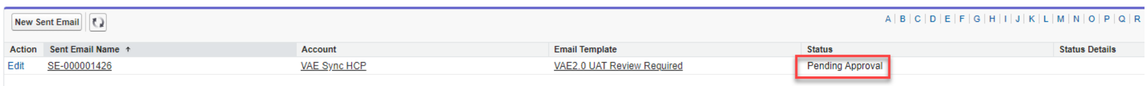
In VAE 2.0 release, Lilly introduced a feature in which Email Template requires review when the email contains at least 1 unrestricted free text item. In this case, the developer of the Email Template MUST include the token {{requiresReview}} in the email.

The token {{requiresReview}} enforce the brand team to review the content entered in the unrestricted free text field before the email sent to the HCP.

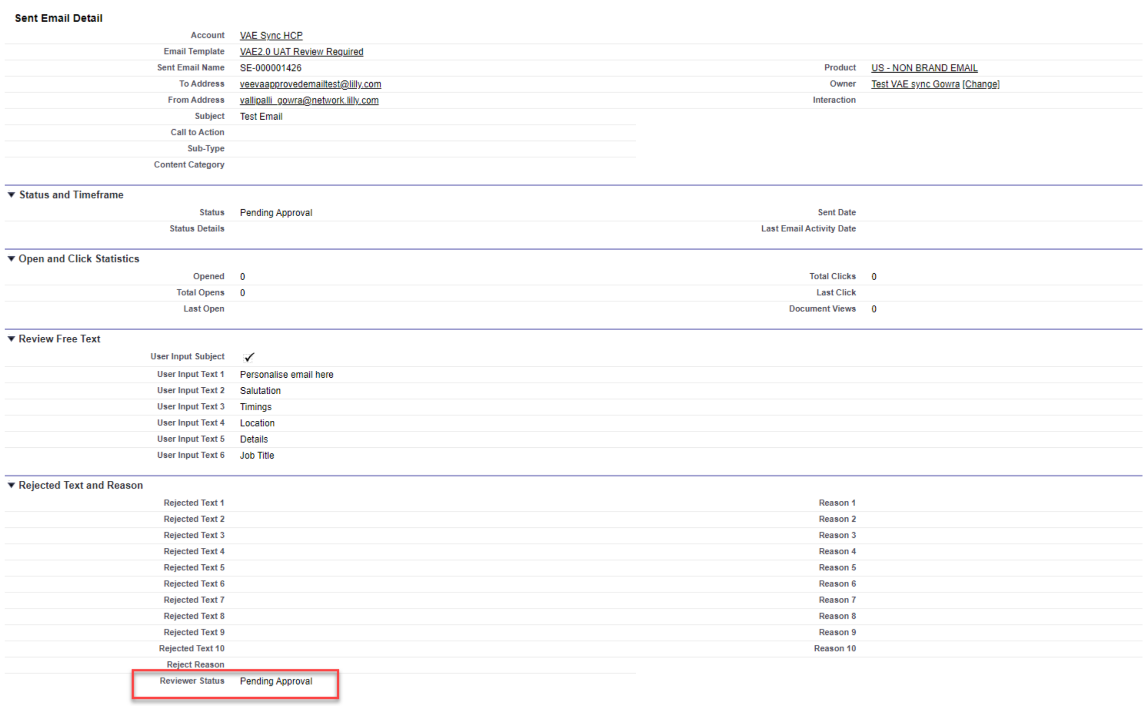
TESTING EMAIL TEMPLATE THAT REQUIRES REVIEW IN PF1

The Developer of the Email must follow below steps to make sure the token {{requireRevew}} is working fine.

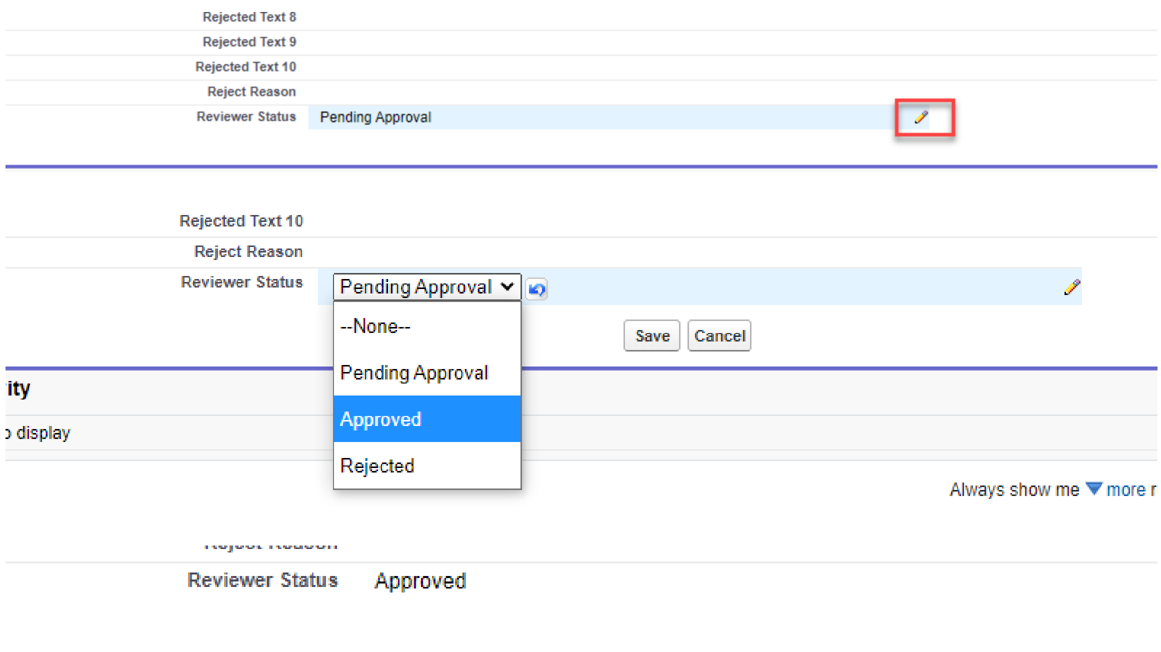
1. Find a **Person Account**
2. Send a test email from staging environment PF1
3. At this point of time, the sent email will be in 'Pending Approval' status since the email requires review.



4. Take a screenshot of the email waiting for the approval



5. Approve the email by clicking on the pencil sign and change the status to 'Approved'



6. Developer receives the email within an hour.
7. Send the email received and the screenshot taken at step 4 to the reviewer for the review.
8. Reviewer provides approval after making sure that everything looks fine and the token {{requiresReview}} is working as expected.
9. Developer submits the Email Template for brand approval.

Section 3 – Content Loading and Administration

This section outlines the operational processes for loading content in Vault and a high-level overview of the content lifecycle.

All Approved Email components and the content that it links to, and visibility to users, is managed in Veeva Vault. Content in Vault is associated to products. These values are then pulled to the CRM system and are used to enable content visibility for appropriate users.

The field users must be aligned to the same product as the email content in order to be able to have access to that specific email content.

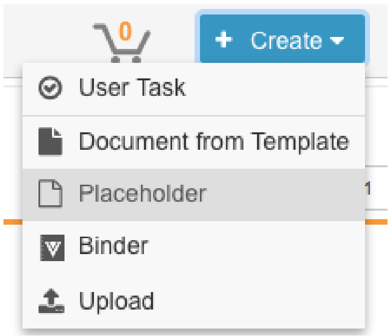
VAULT PROMOMATS TERMINOLOGY

- **Lifecycle** – Vault content has various administrator assigned states that control the eligibility of content to appear in the CRM environments. The stages for Lilly are Draft, Staged, Canceled, Approved, Withdrawn, and Expired. This life cycle is discussed in more detail below.
- **Document –** Generic term to describe content records managed in Vault as tactic, promotional piece, claim, or business supporting documents
- **Fields** - Metadata fields within a document that are used to search, characterize or provide information in order to apply business rules
- **Tasks –** An action that must be performed in order to move a document through the workflow
- **Work Flow –** The overall routing, reviews, and approvals that a content item must complete

LOADING CONTENT IN VAULT

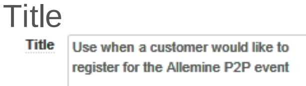
Below is a simple, step-by-step, path to load Approved Email components into Vault and to associate that content and its assets with an Approved Email Template.

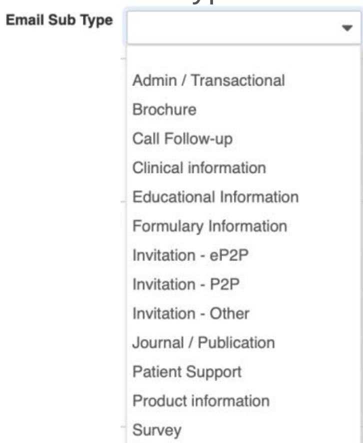
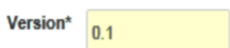
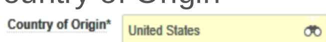
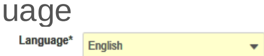
Step #1- Create Placeholder for the type your uploading

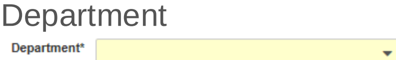


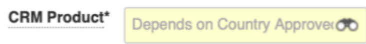
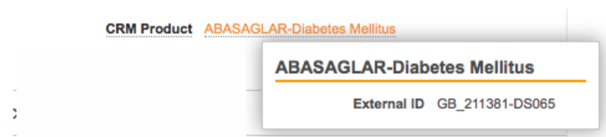
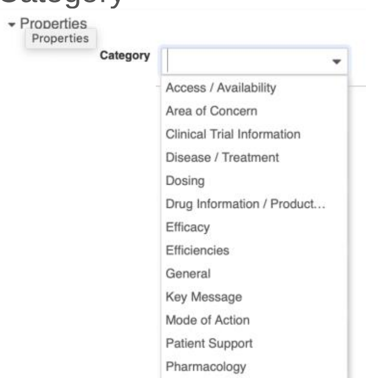
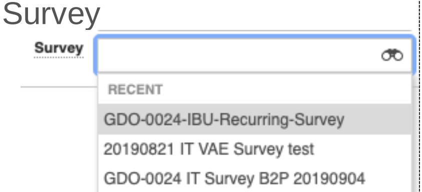
Step #2 – Enter Content Metadata for Email Template

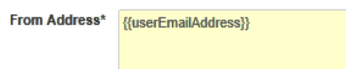
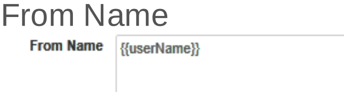
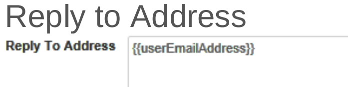
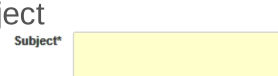
The table below shows the metadata elements and values that need to be entered for an email template.

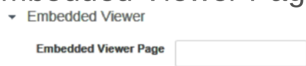
Field	Notes
Name	This field is visible to the representative in iRep as the Email Template name. Use a name that will help representatives understand what this template is and when to use it. See NAMING CONVENTIONS section This field must not contain any of the following characters / \ |
Title 	Short description of the Email Template. This field is visible for the representative on iRep below the name of the Template as the email description. Use as a short description to compliment the name.
Type 	Identifies this document record as an Email Template. Cannot be edited until the document is saved.

Field	Notes
Email Sub Type 	Use this field to classify the sub-type of VAE. Pick the closest that fits the type. Consult with your Brand Manager for guidance on appropriate selection.
Version Number 	**System generated, do not edit.** The version number provides information as to the number of content versions that exist and if there is an approved version already available (i.e., 1.0, is the first steady state (approved) version in the system)
Country of Origin 	The country for which the Approved Email originates. This will be the same as the country of use except when reusing.
Country Approved for Use 	The country for which the Approved Email will be used. **Only 1 country can be selected** here If email is approved for multiple countries (i.e. US & Puerto Rico) it will need to be uploaded twice.
Expiration Date	Date which content will expire. This defaults to one year from the Approval date, but can be changed at this step or during the Approver's final review.
Language 	The language used within the approved email.
Restrict Fragment by Product 	This field determines if fragments must be associated with the same product as the template in order to be used with this template **Most commonly "yes" Is selected.**

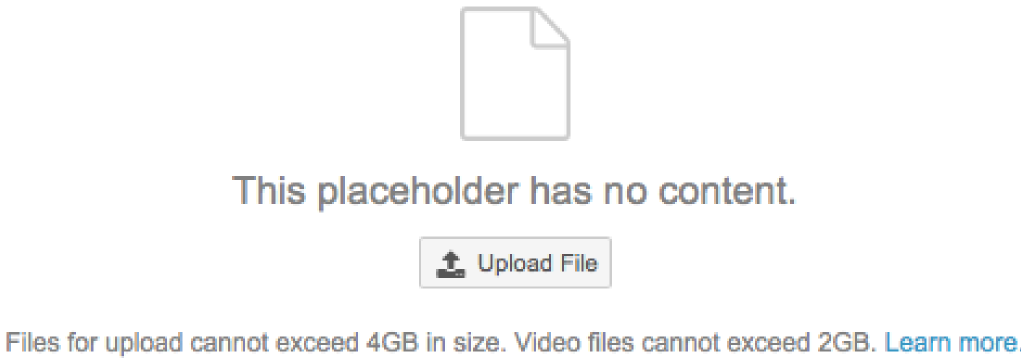
Field	Notes
Content type  Important field to ensure correct consent requirement	This is the consent entitlement required to send this email. (**Only 1 type can be selected here)** **Commercial should be selected for promotional content.** However in UK they must select General
Product & Indication 	Select the product and Indication for which the template is intended to be used. (**Only one product and Indication can be associated with a Template**.) The Product and CRM Product must match.
Territory	Allows content to only be visible to selected Territory codes. By leaving this blank all reps aligned to that Country/Product will be able to view the content. Commonly it is left blank. But often used to align more granularly than Salesforce.
Salesforce Filter	Allows content to only be visible to selected Salesforce codes. By leaving this blank all reps aligned to that Country/Product will be able to view the content. Commonly it is left blank. But often used with Non Brand Email.
Hierarchy Filter	Allows for content to be limited to any of three groups: DISTRICT, SALES SUPERVISOR, and TERRITORY. Leaving this blank will default to send to all groups, but selecting a group will limit visibility to only that group.
Department 	This field is what identifies which type of field user should have access to this content (Medical Liaison, Sales representative, or B2P representative, etc). This field is a dropdown and in PromoMats has the options: RETAIL, B2P, MHS, and INSTITUTIONAL. Sales must be RETAIL KAMs must be B2P

Field	Notes
CRM Product  Important field to ensure correct alignment	Select the CRM product for which the Reps detail. This selection will drive which representatives will have access to send the approved email, only representatives that are aligned to the same CRM product will be able to view and send that approved email. The Product and CRM Product must match.  Hover over the name to see External IDs
Category 	Further classification of the content purpose. Consult with your Brand Manager for guidance. **Optional field**
Survey 	Use to select a CRM Survey for use with the {{SurveyLink}} token in a Veeva Approved Email. See LINKING TO CRM SURVEYS section of this document for more detail.
Email Template Type 	Select Standard Template. Unless creating a Engage Invitation or Remote Consent Capture. See LINKING TO ENGAGE MEETINGS section. See REMOTE CONSENT CAPTURE TEMPLATE section.

Field	Notes
Campaign	Campaign associated with the document. **Optional field**
Audience	Select the intended audience that will receive this template. **Optional field**
Conversion Metric 	Use to select the Conversion Metric for this campaign. Consult with your Brand Manager for guidance. **E.G** Do you expect the customer to **click** a link? Or only **open** and read the email?
From Address 	Type {{userEmailAddress}} to dynamically use the representatives email address. Do not use {{User.Approved_Email_Email_Address__c}}
From Name 	Type {{userName}} to dynamically use the representatives name
Reply to Address 	Optional: Leave blank unless all replies must be sent to a central inbox. Check with local guidance if the representative email address can be used.
Reply to Name	Optional: Leave blank unless the reply name is different from the “From Name”
Subject 	Information to appear in the subject line of the email. **Max subject is 1500 characters** This field must not contain any of the following characters / \ |

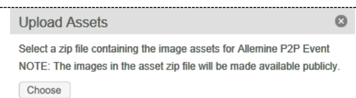
Field	Notes
Email Domain 	Do not populate.
Embedded Viewer Page 	Do not populate.

Step #3- Upload HTML



Step #4 – Add Assets

Assets (graphics) are added using the following steps:

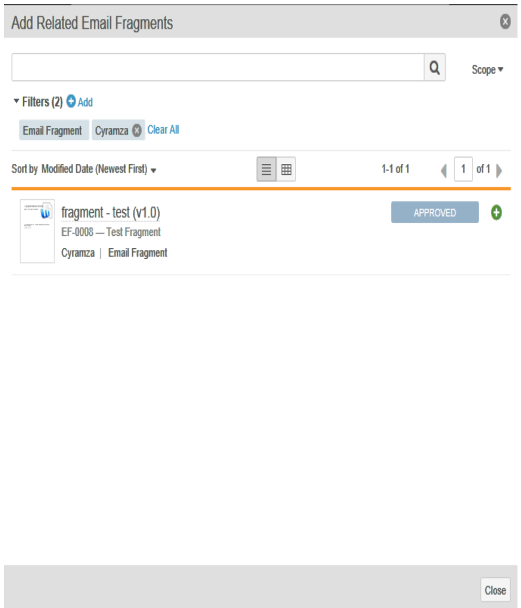
Field	**Notes**
	Select the plus sign to add assets to the template. Assets will contain the zip file for all images to be used within the document
	The upload assets window will appear, select choose to add a zip file containing the image assets Select the zip file on your computer (not shown)

If images are contained within a folder, then the folder must be included in zip to maintain the URLs in the HTML document.

Step #5 – Add Fragments to Templates

Fragments are uploaded to Vault using the same steps that are used to load the Template with only a slightly different set of metadata elements. Upload the Fragments and then associate them to the target Email Template. The table below shows metadata fields on the Email Template that are used to establish the relationship to the appropriate email fragments.

Field	Notes
	Select the plus sign to add related email Fragments The library search window will appear, notice the filters automatically applied to the search, adjust if necessary

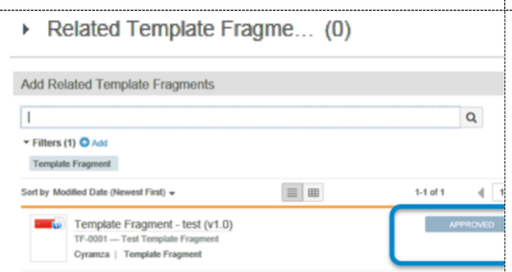
<table>
<tr>
<td>
</td>
<td>Select the plus sign to add a Fragment, the plus sign will immediately change to a minus sign (Select to deselect)

Select close

Fragment is now associated with the Template</td>
</tr>
</table>

Step #6- Add Template Fragments

Follow the steps in the email template screen to add Template Fragments to an existing Template.

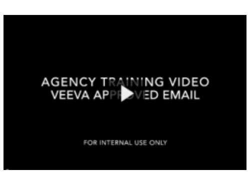
<table>
<tr>
<th>Field</th>
<th>Notes</th>
</tr>
<tr>
<td>
</td>
<td>Select the plus sign next to related Template Fragment to create a link.</td>
</tr>
<tr>
<td>
</td>
<td>The library search window will appear. Notice the filters automatically applied to the search, adjust if necessary.

Select the plus sign to add the template Fragment, ensure the status is approved.

The plus sign will immediately change to a minus sign (select to deselect).

Select close.

The template fragment is linked to the template.</td>
</tr>
</table>



A video on how to upload and test developed content in Lilly's stage is available.

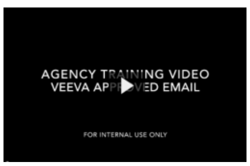
TESTING CONTENT IN STAGING ENVIRONMENT

Lilly maintains a staging environment for testing content.

- The content is migrated to production on every hour. (e.g. 01:00, 02:00, etc)
- When testing tokens that merge data from CRM (e.g. {{Account.PersonTitle}} it is important to only use contacts set up as production.
    - To assist there are created lists of customers that are production like e.g. IBU Contacts

All Veeva Approved Email **MUST** be tested by agency before sending to Brand Manager for approval.

Promotional Material attached to the ‘Related Piece’, ‘Other Related Documents’, ‘Related ISI’ and ‘Related PI’ sections on the Email Template/Email Fragment must be in the “Approved for Distribution” state to send email from staging environment PF1 and Production. Else the sent email will be failed.



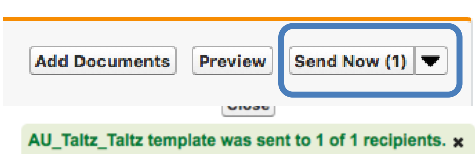
A video on how to upload and test developed content in Lilly’s stage is available.

CREATING A PROOF RENDITON

A single email is often separated into multiple doc types (E.G Email Templates, Fragment and Template Fragment), so visualising the final form can be difficult for brand managers. To assist the approval, process a proof rendition must be created by the agency and attached.

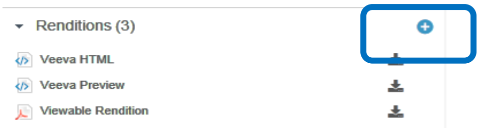
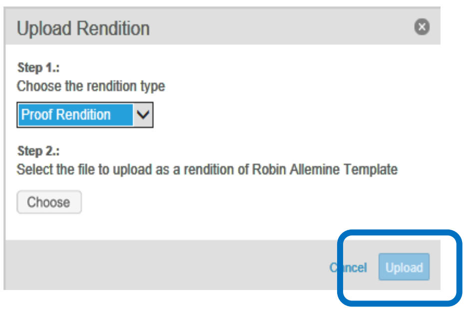
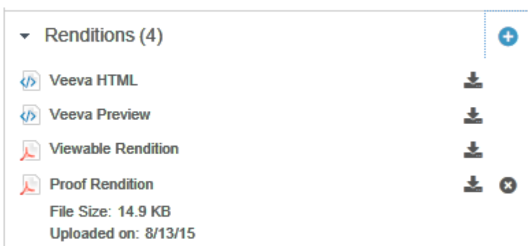
Only create a proof rendition **after** the email has been tested

Step #1 – Create a proof rendition

Images	Notes
	Email yourself the completed email from Stage.
Once you receive the email take a screenshot or create a PDF of the received email.	

Proof renditions must be in either a **PDF**, **JPG** or **PNG** format.

Step #2 – Upload Proof Rendition

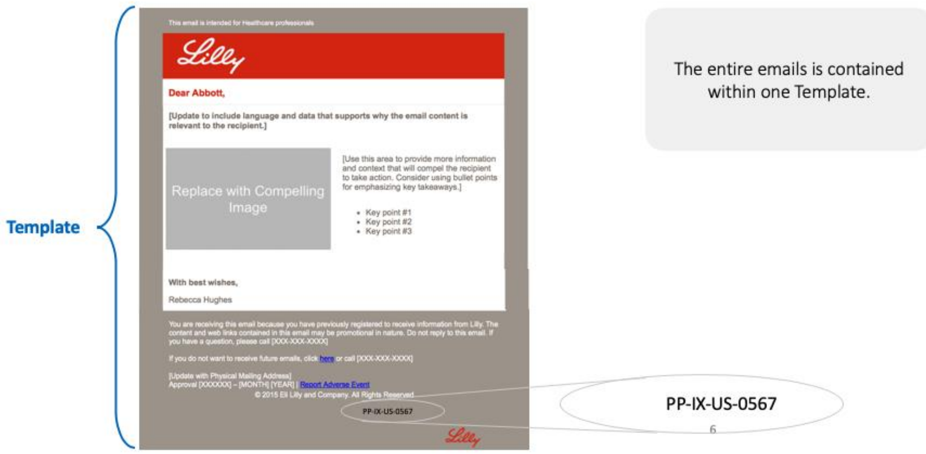
Images	Notes
	From renditions select the plus sign. The proof rendition must be attached to all template types.
	Select upload
	The Rendition will now be available to users.

LINKING AN MLR APPROVED PIECE

Every promotional material (piece) must be approved by our Medical, Legal and Regulatory teams. This includes Approved emails. To ensure no email is approved without this approval the MLR Approved Piece must be linked to the Veeva Approved Email

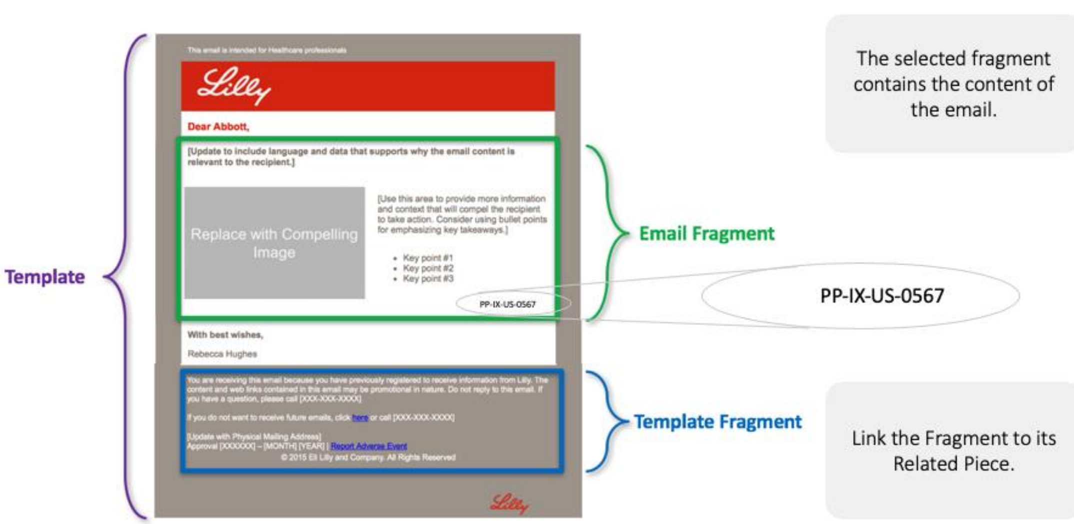
WHEN ONLY A TEMPLATE IS USED

When the email and its content is contained within an Email Template then the MLR Approved Piece must be linked to the Email Template.



WHEN FRAGMENTS ARE USED

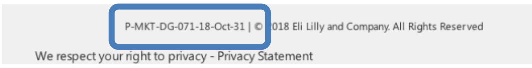
When the email is constructed with a single Email Template and multiple Email Fragments containing content then the MLR Approved Piece must be linked to the Email Fragment.



Only assign a MLR Approved Piece to a **Template** if it has been certified independent of content.

HOW TO LINK MLR APPROVED PIECE

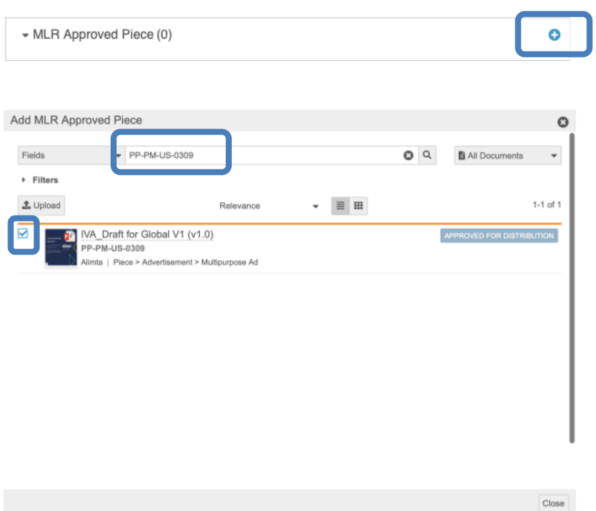
Step #1 – Find the MLR Approved Piece

<table>
<tr><th>Images</th><th>Notes</th></tr>
<tr><td>
</td><td>Find the Piece number (often starts with a PP) on the Fragment or Template. E.G PP-IX-IT-0000

Take a note of the P number for the next step.</td></tr>
<tr><td colspan="2">Work with your Lilly contact if you are unable to identify the MLR Approved Piece number.</td></tr>
</table>

Fragments often have a different MLR Approved Piece to the Template.

Step #2 – Add MLR Approved Piece to the VAE

<table>
<tr><th>Images</th><th>Notes</th></tr>
<tr><td>
</td><td>From MLR Approved Piece, select the plus

Then search for the Piece number

Ticking the box next to the related piece adds it to the document.

Note: More than one piece can be selected</td></tr>
</table>

If the promotional piece is not appearing, then you need to request access (via VeevaApprovedEmail_helpdesk@lilly.com) to Pieces corresponding to the product you require.

SCHEDULED INTEGRATION TIMINGS

Documents that are staged for testing and Approved require an integration job to run for them to be available in Stage and Production respectively.

The schedule of these jobs are as follows:

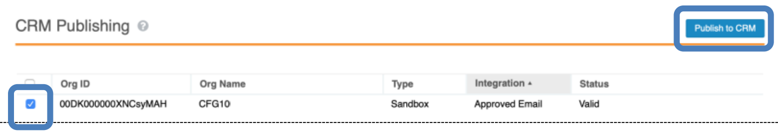
Environment	Timings
STAGE	HH:50
PROD	HH:00

The integration can be triggered manually using CRM Publishing

CRM PUBLISHING

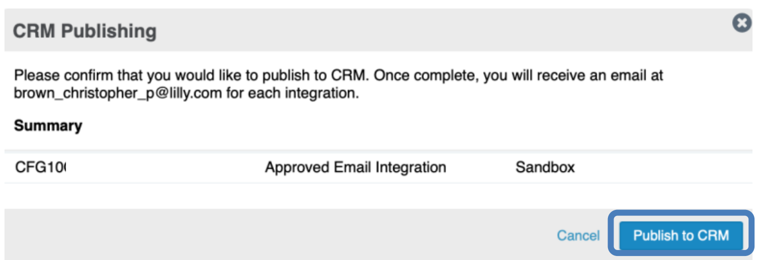
CRM Publishing allows you to push Veeva Approved Email to PF1 manually. No need to wait for the integration to run.

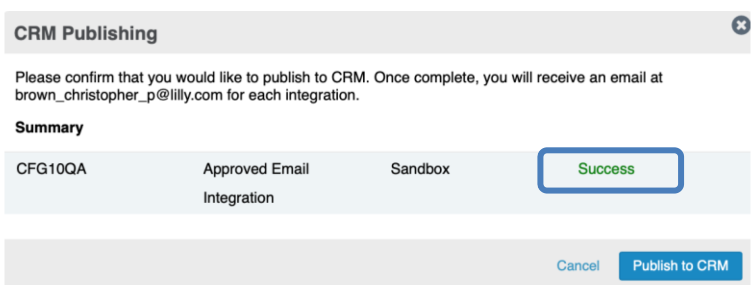
Step #1 – Select PF1 from CRM Publishing tab

<table>
<tr><th>Images</th><th>Notes</th></tr>
<tr><td>


</td><td>Select the PF1 and click Publish to CRM.</td></tr>
</table>

Step #2 – Select PF1 from CRM Publishing tab

<table>
<tr><th>Images</th><th>Notes</th></tr>
<tr><td>




</td><td>Confirm the selections and click Publish to CRM

Be patient it can take a few minutes for the changes to reflect in Stage</td></tr>
</table>

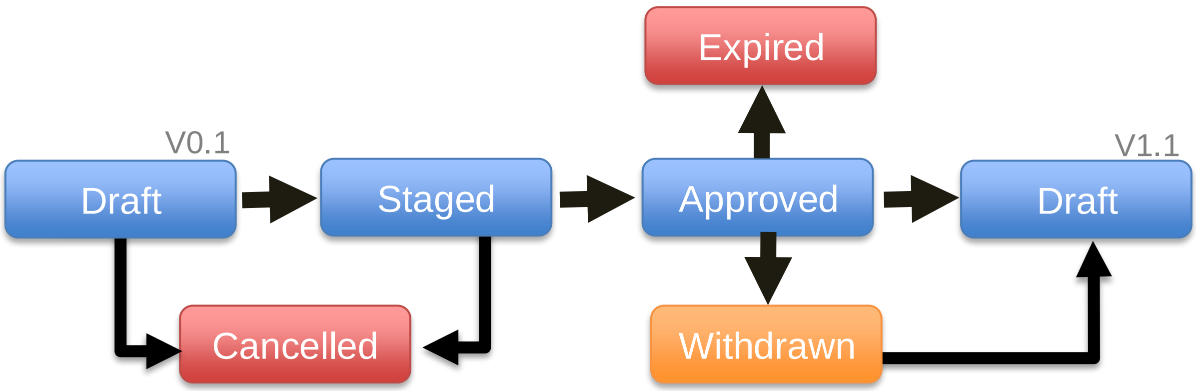
PROMOTIONAL REVIEW PROCESS, APPROVALS AND WORKFLOWS

Vault is the content management repository for all Approved Email content components. However, Vault is also used for MLR approval. Veeva Approved email approval doesn't negate the need for PMAP approval. All components must go through the review process before or in parallel. Once a template is approved, additional fragments can be added later. In that case, the additional fragments will go through the review process as individual documents.

ROLES AND RESPONSIBILITIES

Owner of Document in Vault (*Usually Agency*)	**Gatekeeper of email content** (*Usually Brand Manager*)
• Creative contributor provides a design package for the approved email • Upload and classify the documents (Email Template, Email Fragments, Template Fragments) • Link to promotional piece (If there are links to content that is stored in Vault) • Stage document for testing • Test the staged content in Stage online. • Upload the proof rendition to each email component Vault document • Send for approval	• Work with owner to create the design package • Provide classification information if applicable • Check classification information for correctness • Ensure MLR is completed and ensure promotional piece is linked to document(s) and approved for distribution • Review and approve document • Expire approved email

CONTENT LIFECYCLE



- **Draft –** Content is originally uploaded in a Draft state. The content is then verified and moved to Staging for review. A new Draft can be created from an Approved document for development of the next version. The Approved version will not be superseded until the new version is approved.

- **Stage for Testing** - Allows the developer and Brand Managers to view the Approved Email in the Veeva CRM sandbox.

- **Cancelled** - Cancels the workflow, the document will move into **Cancelled** status. In **Cancelled** status, the owner can still make a copy or send as link.

- **Approved** – Content that is in **Approved** status is pulled into the production CRM environment and is available for use by the field.

- **Withdrawn** – Content that is **Withdrawn** is removed from production and is not available to field users. This state is used when changes are to make the Veeva Approved Email appropriate for use again.

- **Expired** – Content that is **Expired** is no longer visible in either the staging or production environments. It remains available as an expired item in Vault and the Make a Copy function can be used to make a duplicate version as needed.

Section 4: Content Best Practices

WORKING WITHIN VEEVA

Agencies should always refer to the latest Veeva Approved Email Content Creation Guidelines that are part of the online CRM Documentation.

SELF-CONTAINED TEMPLATES VS. TEMPLATES AND FRAGMENTS

Brands and Agencies often need to decide if an email is best suited to leverage the Approved Email fragment capability for messaging or to include all content in a single email template. Below are some factors to consider when making this decision:

- *Potential for re-use.* Content that is likely to be re-used, either in other templates or in the future, should usually be in a Fragment as a best practice.
- *Potential to change.* Content that may change more frequently can be put in a Fragment to avoid the cost of re-coding and reapproving the entire template.
- *Nature of the content.* Some content will be more suited to a modular approach than others will. For example, Templates that use Fragments are more neutral in language to allow them to be used with multiple Fragments.
- *Design*. Email that use contiguous vertical columns will usually not use Fragments.
- *Regulatory restrictions.* Some countries may not allow multiple fragments.

SPAM FILTERS

Content should be developed in a way that minimizes the likelihood that email is labeled as spam by a spam filter in an email client. Avoid obvious spam trigger phrases. "Free Offer", "Click Here" or lots of "!!!!".

Below are some general best practices:

- Use a reputable and stable domain to send emails
- Make the intent clear in the subject line and in the address
- Give users easy to use opportunities to opt-out of future content for a particular product/topic, or all Products/Topics, from Representatives. (Built in functionality in the Approved Email Platform)
- Keep emails short and focused
- Do not use all caps in subject line
- Use images judiciously and always use alt text

Here are some additional sources of information for avoiding spam filters:

- https://mailchimp.com/resources/avoid-spam-filters/
- http://blog.crazyegg.com/2012/06/26/avoid-email-spam-filter/
- http://blogs.constantcontact.com/email-deliverability/

NAMING CONVENTIONS

Having a unique and recognizable name for each piece of content is critical in the administration of the system and for representatives to know which piece they are selecting.

Recommendations:

- Use descriptive text that will be meaningful to the representative. Fragment titles that are prefixed with promotional material or campaign identifiers may make sense to marketing and the content creators but will not have meaning to the representative.
- Use of number at the beginning of the Name to enforce ordering within the alphabetized list of content.

Below is a potential example for the Humalog 200 units KwikPen Patient Profile.

Name: 001. KwikPen Patient Profile_200units/ml

Fragments that link to Vault or Web Content should be named to represent the content to which they link.

Once names are selected, keep names the same even if there is an update to the content until that piece is expired.

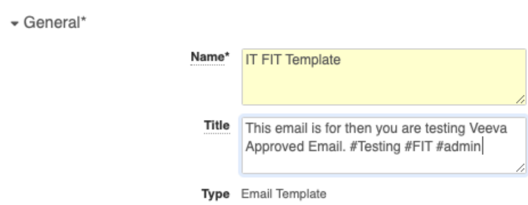
IMPROVING CONTENT SEARCHING

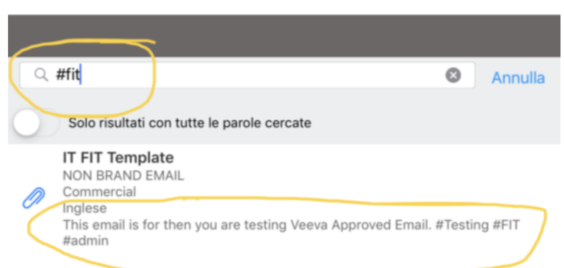
In addition to having a unique and recognizable name for each template and fragment, you must also have a descriptive and optimized description that makes it easy for representatives to search for appropriate content. The Title field is for this purpose.

The following techniques can be used to improve search optimisation:

- Write a description that compliments the template name and details the scenarios suitable for this content

- Any available space after your description, should be used to #tag important key words. These key words can be searched:
    - E.G #Patient #Support #Clinical



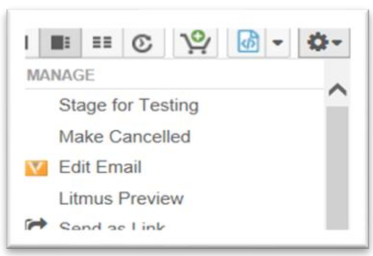


RESPONSIVE DESIGN AND EMAIL TESTING

Since emails may be viewed by the HCP on a multitude of devices it is important that the email content be built responsively so that it is viewed correctly in the email inbox of the recipient. One example resource for understanding responsive design can be found in the following link: https://litmus.com/blog/the-science-of-email-clicks-the-impact-of-responsive-design-inbox-testing

- When a representative sends an email to an HCP, the email will be displayed in the inbox of the recipient based upon the email client and browser that the HCP utilizes. Thus, iRep Email should be designed using responsive design principles to display properly on multiple devices and in multiple browsers. Agency testing should include what the representative will see in iRep and also what the HCP will of the email in their inbox with their email client.
- More information on responsive design can be found online at http://mailchimp.com/resources/research/email-on-mobile-devices/html/ or in other industry resources.

A lite version of Litmus is available built into Vault, that can generate a set of template previews for a subset of browsers and devices. This can be accessed by clicking **Litmus Preview** from the action menu of the specific document.



Appendix

CUSTOM LILLY CONTENT TOKENS

These should be exclusively used in the body of the email template or fragment. Not in Vault meta data.

Token	Description
{{Account.Approved_Email_Salutation_Name__c}}	Inserts the name that should be used when addressing the customer via Approved Email.
{{User.Approved_Email_Email_Address__c}}	Pulls the specifically designated Approved Email Address in the body of the email. This field will be blank if not set by Rep **DO NOT USE IN VAULT META DATA**
{{User.Approved_Email_Name__c}}	Pulls the specifically designated Approved Email Name. This field will be blank if not set by Rep **DO NOT USE IN VAULT META DATA**
{{User.Approved_Email_Phone__c}}	Pulls the specifically designated Approved Email phone number

STANDARD VEEVA CONTENT TOKENS

Token	Description
{{accTitle}} or {{Account.PersonTitle}}	Inserts Account salutation • {{accTitle}} US only • {{Account.PersonTitle}} OUS
{{accFname}}	Inserts Account first name

Token	Description
{{accLname}}	Inserts Account last name
{{accCredentials}}	Inserts Account credentials
{{userName}}	Inserts the representative’s name, typically into the 'from' or 'reply-to' Vault 'Email Template' properties of an outbound email template, or into the body of the email template for personalization.
{{userEmailAddress}}	Inserts the representative's email address, typically into the 'from' or 'reply-to' fields of an outbound Email Template.
{{ObjectAPIName.FieldAPIName}}	Expands the markup syntax when the simple tokens are insufficient. Most field types from the Account and User objects are available, but restrictions exist as outlined below. The following are examples from the User and Account objects: {{User.Email}} {{Account.Specialty_1_vod__c}} {{Account.Formatted_Name_vod__c}} Approved Email officially supports the following field types in markup tokens: • Formula* • Roll-Up Summary* (Account only; formulas not available on User) • Check box • Currency • Date • Date/Time • Email • Number • Percent • Phone • Picklist • Text • Text Area *Certain restrictions apply. See Configuring My Accounts in CRM for iPad for more information.

<table>
<tr><th>Token</th><th>Description</th></tr>
<tr><td>{{customRichText}}</td><td>Like {{customText}} it can be used to allow rep to customize text within an email. This token adds additional features like bold, italics etc</td></tr>
<tr><td>{{customText(number)}}</td><td>Used to create a line of text that can be customized by the Rep. Good for use with a subject.

{{customText(140)}}</td></tr>
<tr><td>{{customText(number|default)}}</td><td>If you wish to add default text to a free text field then add a separator of | and type your default text
The default text can not contain any special characters used by Veeva approved email
[({ : | #)]
Example
{{customText(140|Thank you for seeing me today.)}}</td></tr>
<tr><td>{{customText:Required}}</td><td>Can be added to the end of any {{customText}} token to make completion mandatory.
Examples: {{customText:Required}} {{customText(255):Required}} {{customText(255|DefaultText):Required}}</td></tr>
<tr><td>{{customText[options]}}</td><td>When present in an Email Template, allows a representative to select from a list of options in a picklist. For an administrator, this allows fewer email templates to be created, and promotes re-use while allowing a representative to configure the template to match the location or nature of the call. Examples:
Select from a list of pre-defined greetings, for example, {{customText[good to see you again | sorry I missed you]}}</td></tr>
</table>

Token	Description
	Select from a list of physical settings, for example,{{customText[your practice | pharmacy | clinic | hospital]}} The options can not contain any special characters used by Veeva approved email . [({ : | #)] In addition, users can use merge tokens inside picklist tokens in Approved Email. When referring to them within a picklist you must substatute { and } with #. Currently it is limited to the following tokens: ##accTitle## ##accFname## ##accLname## ##accCredentials## Example: {{customText[##accTitle## ##accFname## ##accLname##, ##accCredentials##|##accTitle## ##accFname##, ##accCredentials##]}}
{{insertEmailFragments}}	Defines the section in an Email Template where Email Fragments are inserted. When the representative selects documents to share, the corresponding Email Fragments for each document will be inserted and stacked vertically. This token must be inserted in an empty <table> </table> tag in the Email Template. It is important the HTML + CSS design of the Email Fragment match the design of the Email Template so the final email renders properly. Customers can limit the number of fragments a representative can insert into an email. For example, {{insertEmailFragments[2,4]}}. This

Token	Description
	means, representatives need to insert at least 2 fragments but not more than 4.
{{emailTemplateFragment}}	**Template Fragments do not currently work with GCCP opt out links. Do not use until fix is identified.** This token inserts an HTML snippet that is managed by the Vault 'Email Template Fragment' document type. It's typically used to append a standard disclaimer or ISI into the bottom of the Email Template. The only constraint is the content type must be HTML and it must fit the overall style of the Email Template.
{{unsubscribe_product_link[,]}}	**Do not use without a GCCP exception. GCCP links must be used See Unsubscribe section.**
{{UserPhoto}}	photo of user stored in the User_Detail_vod object Photo dimensions: 160 px x 120 px For Example: <table><tr><td> {{userPhoto}} </table></tr></td>
{{User_Detail_vod.FieldAPIName}}	Uses the same standard of referencing the object and field in their respective API names.
{{approvedEmailAction}}	Customers have the ability to capture specific HCP actions or requests that appear as links from within the approved email. Note- additional configuration is required to support this feature.
{{engageLink}}	Expands to a URL pointing to an Engage Presentation hosted on an external site. See Linking from Approved Email.

Token	Description
{{EmailAddressUnsub}}	Returns the Email address the Veeva Approved Email was sent to.

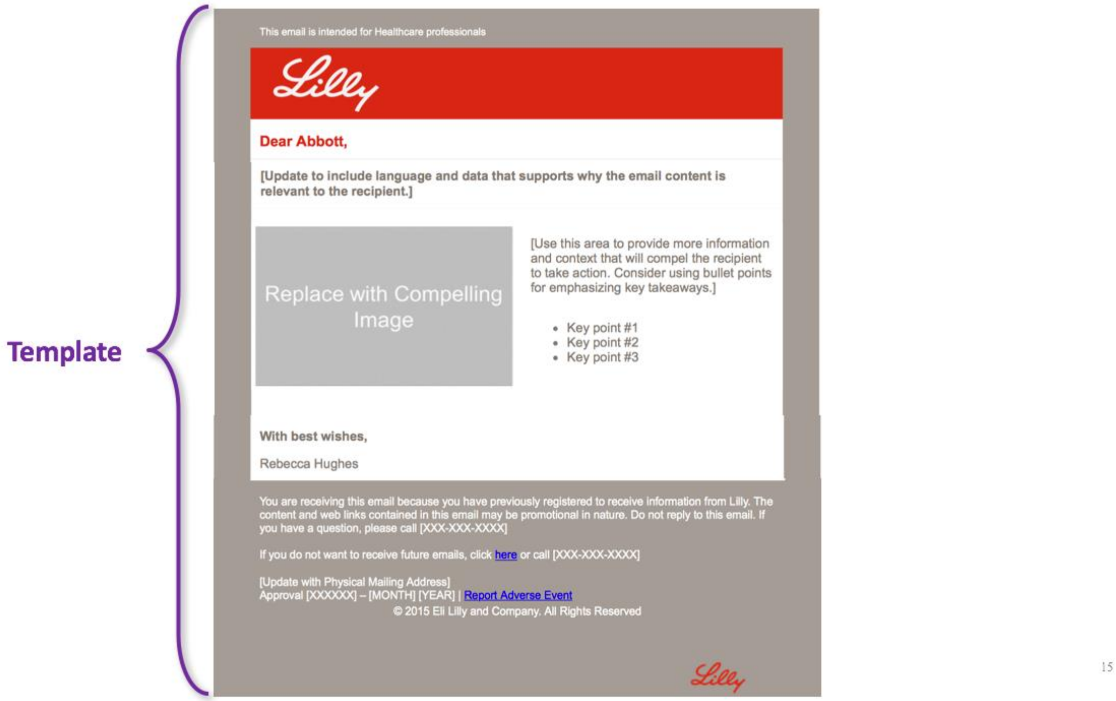
STANDARD VEEVA ENGAGE TOKENS

Token	Description
{{Call2_vod__c.Call_Datetime_vod__c}}	Inserts the date and time of the engage meeting
{{timeZone}}	Inserts the time zone of the Reps iPad system time. Used to support meetings that cross timezones.
{{Call2_vod__c.Cobrowse_URL_Participant_vod__c}}	Inserts a hyperlink to join the engage meeting.
{{insertEngageAndZoomJoinURL[Language Code]}}	Used to insert both Engage and Zoom URLs in invitations sent to attendees of an Engage Meeting. Example: {{insertEngageAndZoomJoinURL[en_US]}} Refer below link for the available language codes: Laguage Codes
{{addToCalendar}}	Adds an ics attachment generated for the engage meeting. This token can be added anywhere. Is not visible on the template.
{{Call2_vod__c.Remote_Meeting_vod__r.Meeting_Password_vod__c}}	Inserts the password into the template. Required when an HCP tries to manually attend the meeting without the link.
{{approvedEmailAction[,RSVP_Accept]}}	Add to a button link, to capture an RSVP accept response that can be viewed in CRM. If alternative landing pages are required replace the “null” with a URL to the desired landing page.

Token	Description
	E.G: If we developed a page at http://www.lilly.com/EngageAccept.html the token would be {{approvedEmailAction[http://www.lilly.com/EngageAccept.html,RSVP_Accept]}}
{{approvedEmailAction[,RSVP_Reject]}}	Add to a button link, to capture an RSVP decline response that can be viewed in CRM. Note: “null” can be replaced with a landing page url as above.

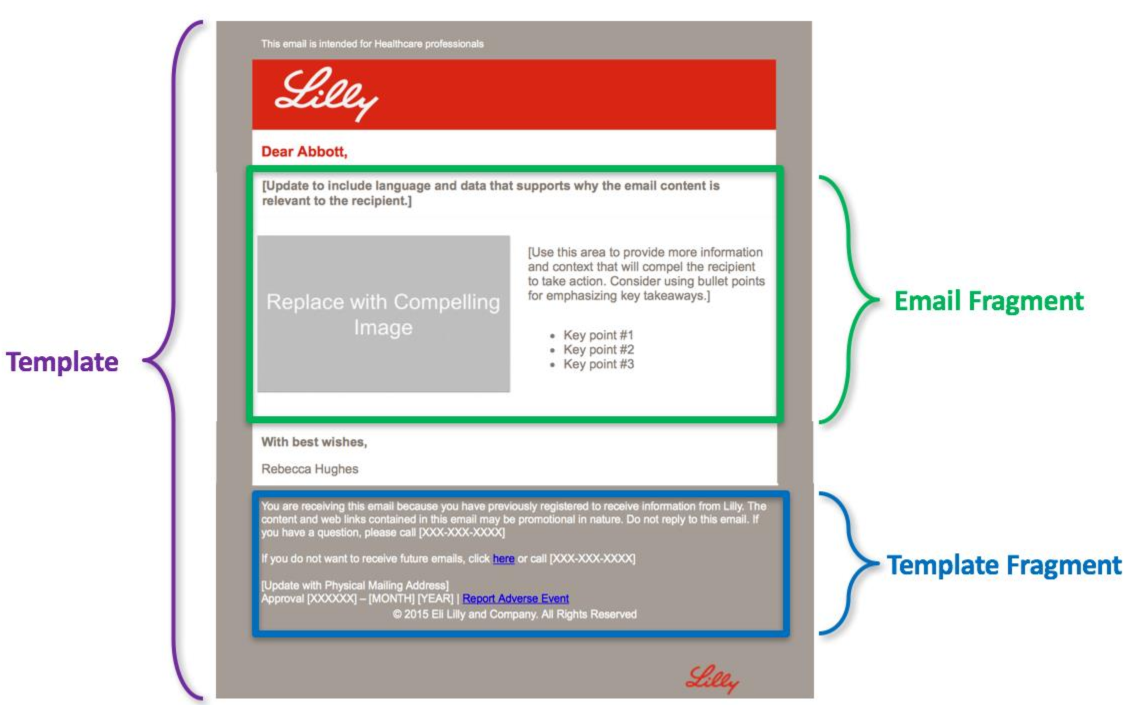
DESIGN EXAMPLES

TEMPLATE ONLY

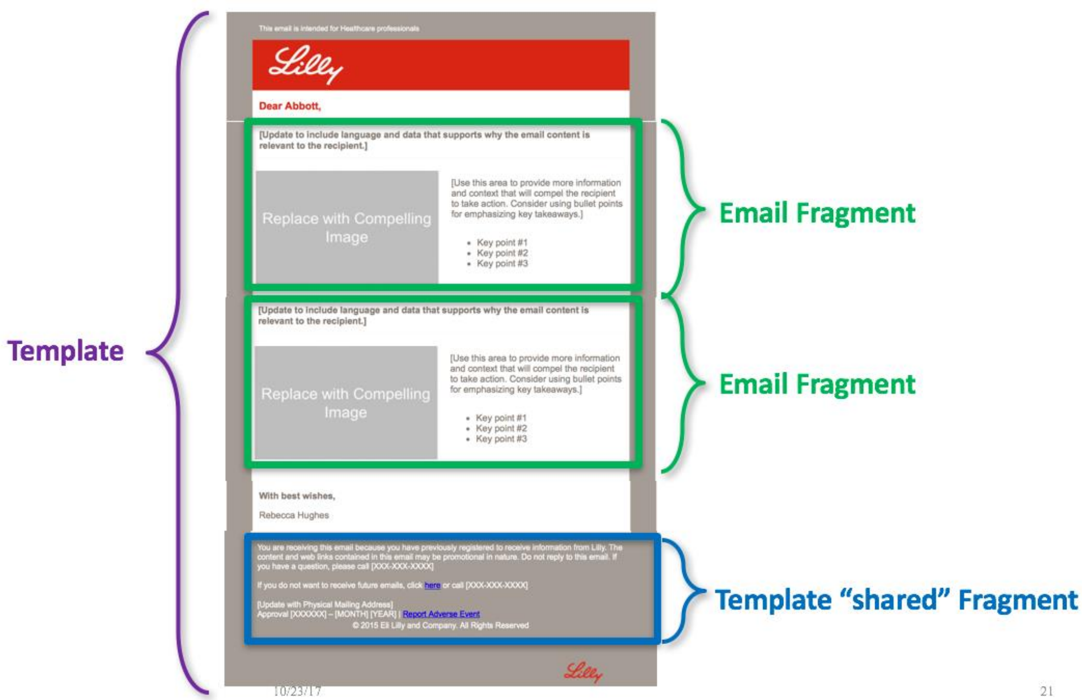


TEMPLATE & TEMPLATE FRAGMENT

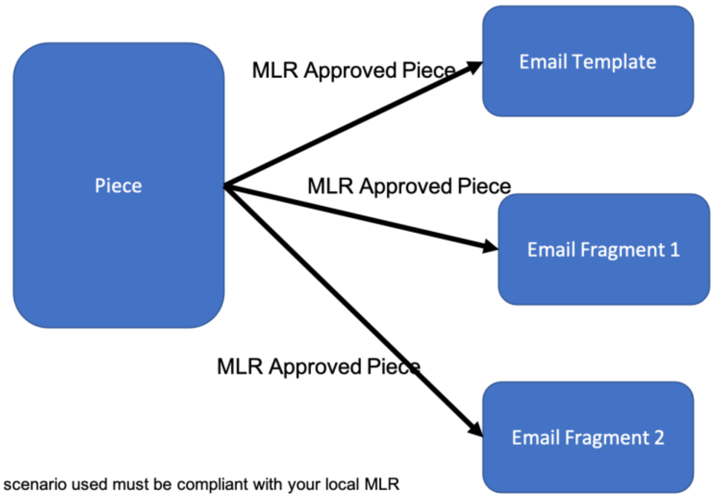
1:1 FRAGMENT TO TEMPLATE



MULTIPLE FRAGMENTS



MLR APPROVED PIECE EXAMPLES



The scenario used must be compliant with your local MLR process.

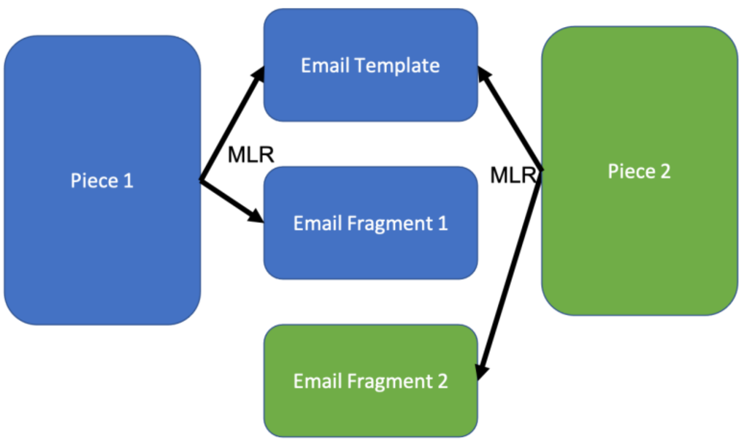
Scenario 1
A single Promotional Piece is used to approve A single Template and its associated Fragments.

Pros

- Easy for initial set up

Cons

- Every time you add a fragment the entire content set is subject the full MLR process.



The scenario used must be compliant with your local MLR process.

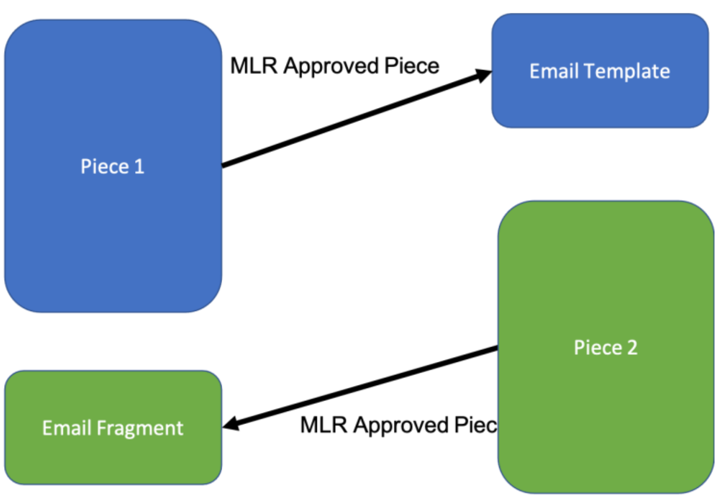
Scenario 2
A single Promotional Piece is used to approve A final form email (regardless of the content used).

Pros

- Clear understanding of final form email being sent to HCP.
- Easier to add a new fragment.

Cons

- A change to the Template will trigger multiple pieces to be reapproved via the full MLR



The scenario used must be compliant with your local MLR process.

Scenario 3
A single Promotional Piece is used to approve A single Veeva Approved Email document.

Pros

- Ease of adding new content as MLR approvals are focused on the new content.

Cons

- Increased set up effort.
- Final form requires understanding of how Veeva Approved Email and its relationships work.

BEE EDITOR

BEE is a drag-&-drop editor for responsive design Veeva Approved Email templates that can be used by Lilly authors. The editor makes it easy to add text, images, dividers, buttons, background colors, and tokens to email templates.

BEE Email Editor doesn't support the design of fragments. As a result, it is recommended that BEE Email Editor only be used for Templates only.

GETTING STARTED WITH BEE

1. Click Create and select Place Holder.
2. Type, select Email template
3. Select Next
4. Follow the same process as with other Approved Emails templates.
5. Select Save and reopen the document.
6. Using the action wheel, select Edit Email
7. BEE Email Editor will open in a separate window.

FURTHER SUPPORT

Additional documentation can be found on the BEE Email Editor and Vault support pages below:

- BEE Editor documentation
- Vault documentation

KNOWN ISSUES WITH BEE

- BEE does not automatically save the file regularly. If the browser crashes all changes that session will be lost.
- After saving ensure you wait until the viewable rendition is completed. Failure to do so can make the template no longer editable.
- Amending an already approved template using **Create Draft** workflow: Vault workflow does not copy over the Email Editor rendition critical to continuing to edit the document with BEE Email Editor.
- To fix the rendition must be manually downloaded from the previously approved document (e.g 1.0) and uploaded to the new version (e.g 1.1).

USING THE FRAGMENT GENERATOR

A master email Fragment acts as a template for automatically generating email Fragments from any available document in Vault. One master email Fragment can be used for many different documents, providing an alternative to creating separate email Fragments outside of Vault for each document that you wish to use for Approved Email. To create an email Fragment, users simply select a document they wish to send via Approved Email, select the Create Email Fragment user action, and then select the master email Fragment to use. Vault automatically generates the email Fragment and links it to the selected document.

To set up an email master Fragment:

- Create a new document with the document type Master Email Fragment. Include the HTML file as the source document and be sure to select at least one product in the document fields.
    - The call to action must use the token {{PieceLink}} to link to the originating document.
    - Vault tokens are available to use to merge Vault fields into the Master Template. (See Table below)
- Optional: Under Assets in the document fields, upload a ZIP file with the asset files (images, etc.) used in the master email fragment's HTML.
- Optional: Add relationships between the master email fragment and related documents (prescribing information, etc.) using the provided relationship types.

To create an email Fragment from a master:

- Open the original document that you want to turn into an email Fragment.
- From the document's actions (gear) menu, select Create Email Fragment.
- In the Select Master Email Fragment dialog, choose a master email Fragment.
- Click Create to start creating the new Email Fragment document. This may take a few minutes.

When you create a new *Email Fragment* document from a master email fragment and an original document, Vault:

- Creates a new document with the Email Fragment document type and sets its status to **Draft**
- Copies the following field values from the original document to the new Email Fragment document: Name, Title, Country, and Product
- Copies the following relationship and field values from the Master Email Fragment document to the new Email Fragment document: Embedded Viewer, CRM Territory, Lifecycle, Assets, Related ISI, Related PI, and Other Related Documents
- Copies the source file from the Master Email Fragment document to the new Email Fragment document, with Vault tokens replaced by their corresponding values; for example, the token ${title__v} is replaced by the original document's Title value. (See below for a list)
- Creates a Related Pieces (PromoMats) or Related Medical Content (MedComms) relationship on the new Email Fragment document, pointing to the original document

The Fragment generator only works for documents classified as "Promotional Materials" that are in the **Approved** state in Vault. The Fragment generator cannot be used for "Email Supporting Documents."

VAULT TOKENS

Token	Description
${name__v}	Inserts Name of Piece document
${title__v}	Inserts Title of Piece document
${purpose__c}	Inserts Purpose of Piece document
${document_number__v}	Inserts the PP number
${country__v}	Inserts the Country Approved for use
${product__v}	Inserts Product
${indication2__c}	Inserts the Indication
${approved_for_distribution_date__vs}	Inserts the approval date.

Other tokens are available on request.

EXAMPLE MASTER FRAGMENT

${name__v}

${title__v}

Direct Link

${document_number__v} - ${approved_for_distribution_date__vs}

CONTENT DEVELOPMENT FAQS

Q: Can only 1 Template Fragment be used in a Template?

A: Yes, only one Template Fragment can be used for a Template.

Q: Can a Template Fragment be used as a header?

A: Yes, the Template Fragment is inserted in the Template wherever the token is used. A Template Fragment can be inserted into the Template at any **location** within the Template as defined by where that token is inserted. For example, the token can be inserted at the top of the Template, as well.

Q: Do template fragments show up in the email that the representative sees on iRep before it is actually sent to an account?

A: Yes

Q: What does not show up in the email that the representative sees on iRep? Is it only the dynamic footers?

A: If online: only dynamic footers are not seen, everything else is.
If offline: pictures are not shown also.

Q: Is it possible to build default text into a Rich Text field token in the HTML of an Approved Email template?

A: No. It is not possible to have default text in Rich Text. Default text is possible only when using the CustomText token.

Q: What is the character limit for fragments and templates?

A: There is 100k Character limit for each component of the email. Fragments, Templates and Template Fragments each have their own 100k-character limit.

Q: Can graphs/tables/figures be included? How do they affect the character limit?

A: They can be included. The character limit relates to the code to create the tables or graphs within the HTML - not to images in the email.

Q: What components of the email and fragments are customizable within the approved template?

A: There are a broad range of options available using content tokens to pull from CRM or giving representatives the ability to choose the specific phrases of words that can be included in the content. Content within fragments cannot be customized. Lilly does support the use of the Master Email Fragment that does allow fragments to be created from approved content in Vault.

Q: What limitations are there on customized portions (number of choices, character length, etc.)?

A: There are no hard limits on HTML coded drop downs and other elements. Like all development activities, these need to be coded with performance in mind and tested.

Q: What are the limitations on the number of recipients?

A: This is an email platform to enable the representative to send personalised email to single HCP or a small group of HCPs at one time. There can be up to 50 recipients sent one email template at a time.

Q: What can you filter templates by?

A: Products. (Topics may be possible based on configuration)

Q: Can you have multiple templates per brand?

A: Yes. There is no hard limit on the number of Templates that can be available for use with any given product.

Q: Are you able to automatically link fragments or place any restrictions on the fragments associated with a certain template?

A: You can limit the Fragments available for use with a template. One can also limit the number of Fragments that can be inserted into a Template for an email that is being sent. Lilly recommends that no more than 1 Fragment be inserted into a Template prior to sending to an HCP.

Q: Is the ISI able to reside within the template itself?

A: Yes, the ISI can be in the Template within the limits of the character count. This approach would also mean that the template would need to be updated and sent back through approval whenever an ISI is updated. Having the ISI in a template fragment would help avoid this and, actually, would be a more reliably complaint approach.

Q: What are the restrictions on subject lines (length, number, etc.)?

A: There is not a hard limit, but we would recommend that this not be more than a few choices. It is important to keep in mind that subject lines are displayed in the inbox of the recipient and thus have a short number of characters, especially if viewed on a mobile device. Subject lines should be actionable and not appear to be marketing messages.

Q: Is there the capability to add attachments to emails?

A: Emails sent through approved email do not have attachments. Recipients of emails tap on links within the email. These links can take them to content housed in Vault or to other Lilly web properties.

Q: What programming is required to create email templates and fragments? What are the exact specifications for programming email content?

A: Emails are composed of basic HTML5 components as outlined in the Veeva Content Creation Guidelines for Approved Email.

Q: What alternatives are there to custom rich text?

A: Rich text is an input token. There is no special token for inputing date, date/time, number, and text. They can use the free text token - {{customText}} which will create a text field where the user can input a string of text. And the token notation - {{ObjectAPIName.FieldAPIName}} isnt an input token, it will simply fetch the value from the field referenced in the object and replace the token with the value.

Q: How can a dynamic subject line be configured?

A: Dynamic subject lines are configured in Vault when the Template is loaded. Representatives can be given the option to choose the subject line that will appear for the given email that they are sending to the HCP.

- Subject lines should be a call to action or clearly indicate the purpose of the email, for example:
- Follow-up to our meeting
- New indication information, etc..
- The subject line should not be a marketing message.

Use the following code token when entering the potential subject line options in Vault: {{customText[options]}}

Q: What is the Maximum file size that can be uploaded to Vault?

A: Any file that you upload to Vault must be under 4GB in size. This limit applies to uploaded renditions as well as source files.

Q: What types of tokens can be used in the Master Email Fragment?

A: The tokens available in Vault depend upon the type of field that you are editing:

MESSAGES

- Document details (fields, version, user information for Document Owner, link to **Doc Info** page, etc.)

DOCUMENT NUMBER FORMAT

- Limited set of document details (product, country, site, study)

OVERLAY TEMPLATES

- Document details (fields, version, role assignments, etc.)
- Viewable rendition details (total page count, page number)
- User details for currently logged-in user
- Download details for the original download during which Vault applied the overlay (download date)

Q: What are the pixel limits for embedding images in an Approved Email?

A: There are no height limits, but the width limit for a non-responsive email template is 600 pixels. For responsive templates, the width of images will vary because of the code in the media query. This media query width parameter value can be altered using the code:

```
<style type="text/css">

@media only screen and (max-width: 550px) {
```

}

</style>

Q: Besides the Approved Email Phone Number, is there another phone number token that can be used for an Approved Email?

A: Yes there is. The token that can be used to pull in the Rep's primary phone number is {{User.Phone}}. Please note: Before using this token it is highly recommended to verify the Reps' phone numbers are consistently input in your org because a rep cannot change or add a Rep's phone number in Veeva CRM. If you wanted to include an HCPs phone number you would use the token {{Account.Phone}}.

Q: If content is being tested in Vault, what is the correct process to remove it?

A: After your testing is completed in Vault, the content used exclusively for that testing should be removed from the environment. This should be done by using the "Make Cancel" option.

Q: What is causing extra "white space" to appear around an email's exterior so that it doesn't cover the bulk of the screen like it should?

A: There are a few reasons why this may not happen. The first is that the template was not coded responsively, thus the device it is being viewed on is not compatible with the email's design. The second reason is that the tables within the template should have a consistent width throughout an email. If not, it may cause the email to be misaligned.

Q: Can I upload a webpage into Vault?

A: Unfortunately, this is not supported functionality and you cannot do so. Vault cannot be used for landing pages. These will need to be hosted with another CDN or Web platform. E.G: Salesforce Marketing Cloud or Contenful.

Q: Can I link to Vault from an external webpage?

A: Unfortunately, this is not supported functionality and you can only link to Vault from a VAE.

Q: What is the process for re-uploading Approved content?

A: If there is an issue with the product mappings for an affiliate the agency may be asked to re-upload already approved content. The following steps assume no content updates are needed:

Agency:

1) Select template/fragment/template fragment and "Make Withdrawn"
2) Select "Copy File from Current Version" to bring to "Draft" state

3) Verify all metadata appears as expected. Additionally, ensure any fragments/template fragments/assets appear as expected.
4) "Stage" for Testing
5) Send test email in Stage
6) Convert email to pdf. Add as proof rendition.
7) Submit for Brand Team Approval

Brand Team:

8) Same approval process as before: review metadata and proof rendition. If everything looks good go ahead and approve.

Q: Can link clicks be tracked in approved email?

A: We have the ability to tag a link with a custom tag or with the fragment ID.

The tag that is clicked is read when a recipient clicks a link in an email and the Doc ID is stored on the Email_Activity_vod record.

Developers need to add

- The {{AppDocId}} token to the <a> tag in the Email Template or Fragment to indicate which URL needs tracking with the Document ID.
  - For example: Example - Click Here. .
- Add LinkName parameter to the URL with a custom identifier.
  - For example: Click Here. .

Q: Can individual link clicks be tracked?

A: To understand the tracking and usage of what content is being accessed, customers have the ability to label a link within an email fragment. The URL address that is clicked when a recipient opens an email, is saved and stored on the Email_Activity_vod record.

Content Administrators need to add the LinkName token to the <a> tag in the Email Template or Fragment to indicate which URL needs tracking.

For example: Example - Click Here. .

Q: Can you send emails with fragments from multiple brands

A: If the affiliate allows for promotion of multiple products within one email then you can follow the steps below

Template	Template Fragment	Fragments
• **Product:** Non-branded, • **Indication:** N/A • **Restrict fragments to product:** No • **Salesforce Filter:** Must be aligned to a salesforce code. Leaving blank will make it visible to every rep regardless of product alignment.	• **Product**: Non-branded, • **Indication**: N/A	• Branded to align with content within fragment

WORKFLOW FAQS

In addition to the content loading examples and workflows discussed above, please see responses to some specific questions below.

Q: ***How do I test staged content?***

A: Here are the steps that should be followed:

1. Load content to Lilly Vault.
2. Set status of each email document component to **Staged**.
3. Wait for integration to run automatically at the top of every hour between Vault and Stage.(This is the minimum time interval that can be scheduled for the integration to run in the product.), or send a request to VeevaApprovedEmail_helpdesk@lilly.com to request that the Approved Email integration be run.
4. Log in to supplied test user account online in Stage
5. Using Send Email feature online, send a test email to a test email account. Select a "person" account when doing a test email send. All email will be sent to the email address associated with the test users CRM login regardless of the email address associated with the person account.
   - Log into test email account and view email that was just sent.

Each Email should be tested for the following:

Online

- Ability to be viewed and sent from CRM online, including the ability to include any fragments and to choose any variable text elements.
- Visibility and graphics of all content components.

Mail Client (Inbox of Test Email Account)

- Visual completeness and positioning of all components of Email including all variable text elements, all Fragments and all Template Fragments, if applicable.
- Compliance with approved version.
- Functioning of unsubscribe link.
- Functioning of content links.

Q: How do I know that the content that I am reviewing matches what was developed?

A: The content that is being reviewed should match the proof rendition of the content that has gone through the PMAP process. Screenshots should be compared. The file name should contain a reference to the version (or the date) and may be matched to the latest version in Vault if needed. Verify that the timestamp of the proof-rendition is after the timestamp of the source file.

Q: How do I version content?

A: Content will be automatically versioned in Vault if the same document record is being used to upload a new version of the content. If a new document record is created, this new document should have a unique file name that indicates it is a new version.

Q: How do I update active content (content that is in the field) while keeping the current version active?

A: It is important to use the same document record in vault when content updates are required. On the document record of a document that is in approved status, the action wheel will have a “create draft” option. This option will allow one to create a new draft version of the same document that can be staged and tested as described above. Once this new version of the content is approved, the current approved version that is in the field will automatically be expired in Vault.

Q: How do I withdraw content for revision?

A: A **Withdraw** state has been implemented for Lilly, which allows content to be temporarily removed from production for minor revision. This state should be used when minor changes need to be made that do no necessitate a new draft, approval, or review workflow. For changes that require workflow and approval of the content, a new Draft version should be created and routed through the lifecycle and workflow. Once the content status is set to withdrawn and the integration runs, the content will no longer be available as staged content in Stage or for the field to use. The state of **Expired** should be used when content should be removed from the field permanently and will not be updated for future use.

Q: How do I retire / expire content? How do I cancel content (Will never be approved)?

A: Content that has not been in a steady-state of **Approved**, may be cancelled. Content that is cancelled cannot be un-cancelled, but it can be copied. Content that has been Approved can be 'Expired', but may not be 'Cancelled’.

Q: How do I re-use / re-purpose existing approved email templates / fragments?

A: If Fragments are assigned to the same product, the Fragment can be used with multiple Templates as long as the relationships are established in Vault. Alternatively, a copy of the Fragment can be made in Vault, and the metadata can be modified as needed in Vault.

Q: How does this fit within the affiliate PMAP process?

A: The current PMAP process should continue to be followed as documented above and/or as required for your local approval process.

Additional information on the approval process is available in the brand manager training materials. Please consult those documents and your local approval process resources in addition to this document.

Q: I cannot see my staged email?

A: There are a number of common reasons you would not see your staged content below are some examples you can check

1. Is content Type assigned as per the country of use's requirements.
2. Are any of the tokens malformed for example containing a Veeva restricted character in default text or dropdown option. These are [({ : | #)]
3. You can only assign one selection for the following fields: Country of Approved Use, Product and Content Type. Multiple selections will not be transferred
4. Are you aligned to the correct product, salesforce or role as per the template?
5. Check the html code is not over 100,000 characters.
6. Email address must use a @Lilly.com domain.
7. Email VeevaApprovedEmail_helpdesk@lilly.com if all the above is correct.

Q: The email I sent from Stage was not received?

A: Here are some common reasons:

1. From address is not from a @Lilly domain address
2. From address field is blank
3. From address has an incompatible token
   a. {{User.Approved_Email_Email_Address__c}} is blank by default in most CRM configurations and emails with a blank email address will not send
   b. It is recommended you use {{userEmailAddress}} in the From address field
4. Check all **Supporting Documents** and **Pieces** being linked to from the Template or fragment are **Approved for distribution**

Q: Can you embed a video within an email?

A: Most email clients do not support embedded emails. So we recommend that videos are hosted in Vault or Invision and linked to the video from a highlight video.

For more information see this useful article: https://www.emailonacid.com/blog/article/email-development/a_how_to_guide_to_embedding_html5_video_in_email

Q: My CRM Product is missing?

A: Only products that are aligned to real reps in production appear in PF1. If reps have recently been aligned to the product then it can take 24 hours.

Q: I cannot see the Promotional Piece I need to link in MLR Approved Piece?

A: Only Pieces relating to Products you are authorised to view will be listed in the MLR Approved Piece selection screen. As a result you may need to request access to additional products in Vault to see them.

Use either the Access Request form or email the VeevaApprovedEmail_helpdesk@lilly.com for assistance.