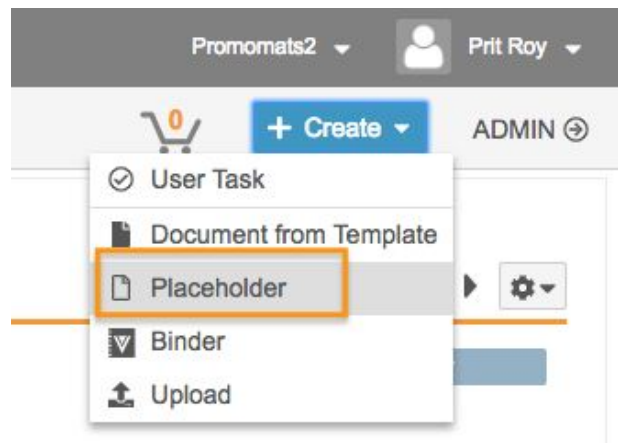


## 1) Creating BEE Content to distribute to a Customer Vault

A Content Admin that would like to distribute BEE content to a Customer Vault must have access to a Veeva Vault with BEE embedded.

1. Enable BEE functionality in the source Vault using configuration steps mentioned [here](#).
2. In the source Vault, from the top-right corner of the screen, click Create -> Placeholder



2. In the 'Choose document type' field select the Email Template option. Click 'Next'.

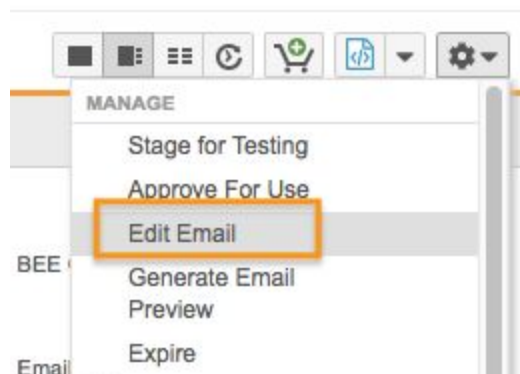
### Create Placeholder (Step 1)

Choose document type

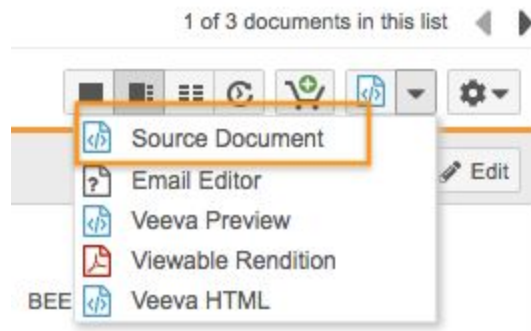
Email Template

Cancel Next

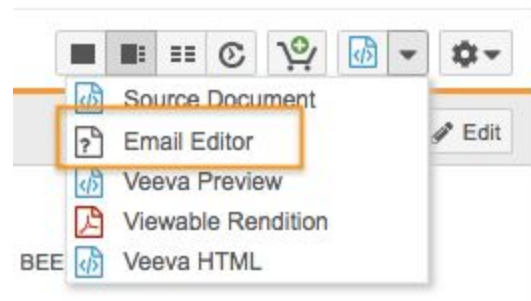
3. Click 'Next'. Enter at least all required information for the Email Template and click 'Save'
4. In the top-right corner of the screen, click the gear icon -> Edit Email.



5. The embedded BEE editor is launched.
  - a. Edit the email using the right-hand pane to drag and drop elements into the email template.
  - b. Keep track of any images that were placed within the Email Template. These image files must be sent to the customer so that they may load the Email Template in their Vault instance.
  - c. Once editing is completed, click 'Save' in the top right corner of the screen.
6. Click dropdown icon next to the source document button in the top-right corner of the screen. Download the HTML document of the Email Template by clicking 'Source Document' in the dropdown menu.



7. Click dropdown icon next to the source document button in the top-right corner of the screen. Download the JSON document of the Email Template by clicking 'Email Editor' in the dropdown menu.



8. Download Assets.
  - a. In the right-hand pane, expand the Assets section by clicking on the assets header.
  - b. Click the download icon to download the images that were used in the email template.

▼ Assets (1)



Assets

File Size: 3.4 KB

Uploaded on: 10/26/2018 5:46 PM EDT



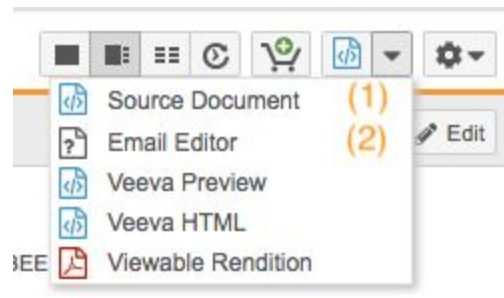
As previously mentioned, the images used in the Email Template must be passed to the customer. The zip that was downloaded after clicking the download icon in this step contain all images used within the Email Template.

The HTML document of the Email Template, JSON document of the Email Template, and all image files that were included in the Email Template must be passed onto the customer so that the customer can load the newly created content into their Vault instance.

## 2) Loading BEE Content into Customer Vault

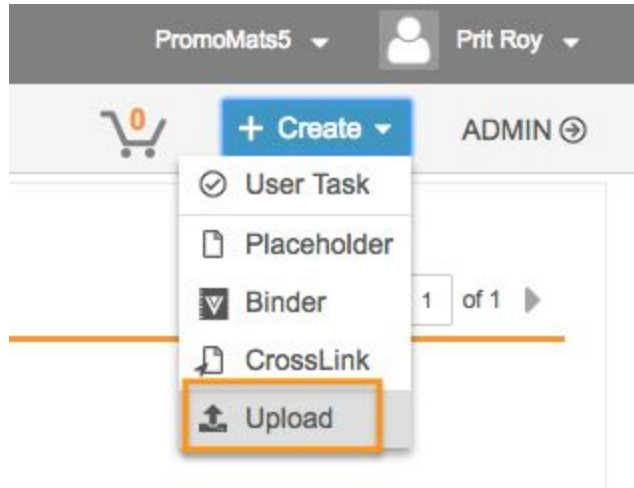
To load BEE content into a customer Vault, a Content Admin will require

1. HTML of Email Template. In Vault, this is referred to as the Source Document
2. JSON of Email Template. In Vault, this is referred to as the Email Editor rendition.
3. Any images that exist in the Email Template. i.e. if there is a banner in the template, there might be an associated banner.gif file.

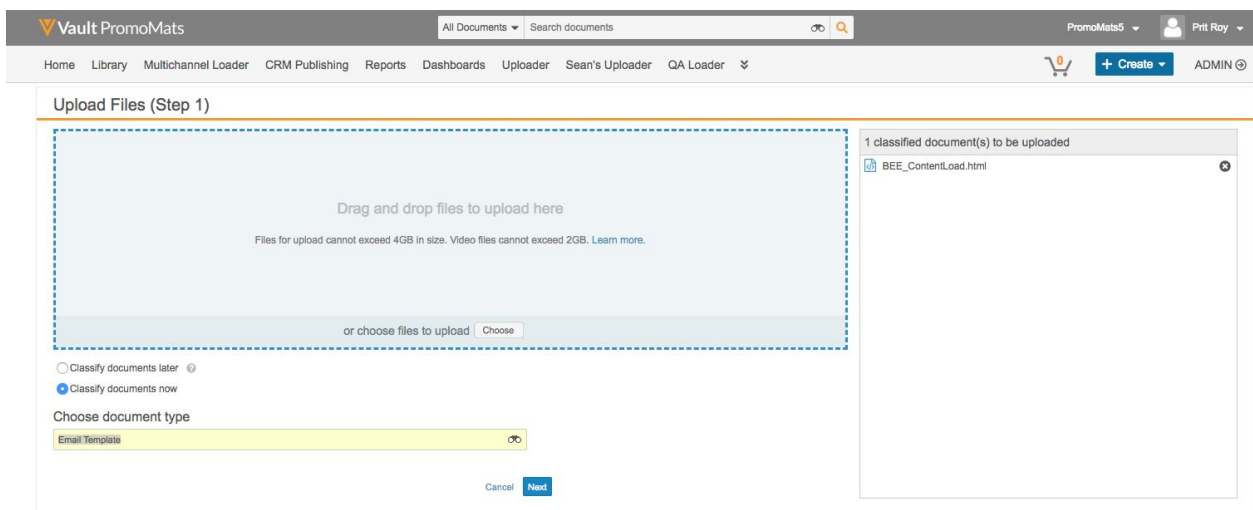


Once a Content Admin has these files, the following steps should be followed to upload BEE content:

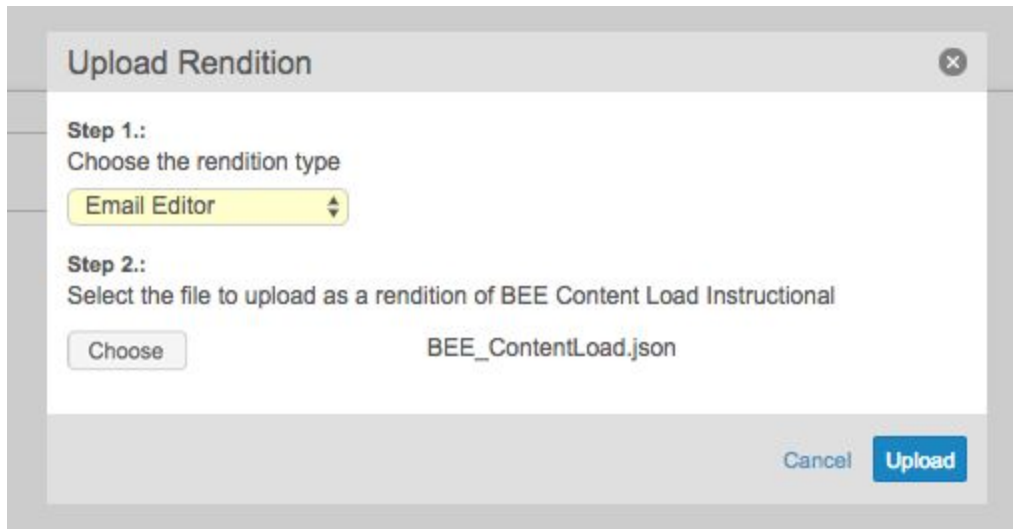
1. In the target Vault, from the top-right corner of the screen, click Create -> Upload



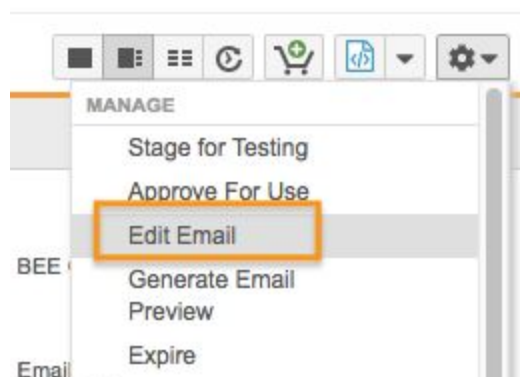
2. Upload the HTML of the Email Template using the 'Choose' option and navigating to the document. In the 'Choose document type' field select the Email Template option.



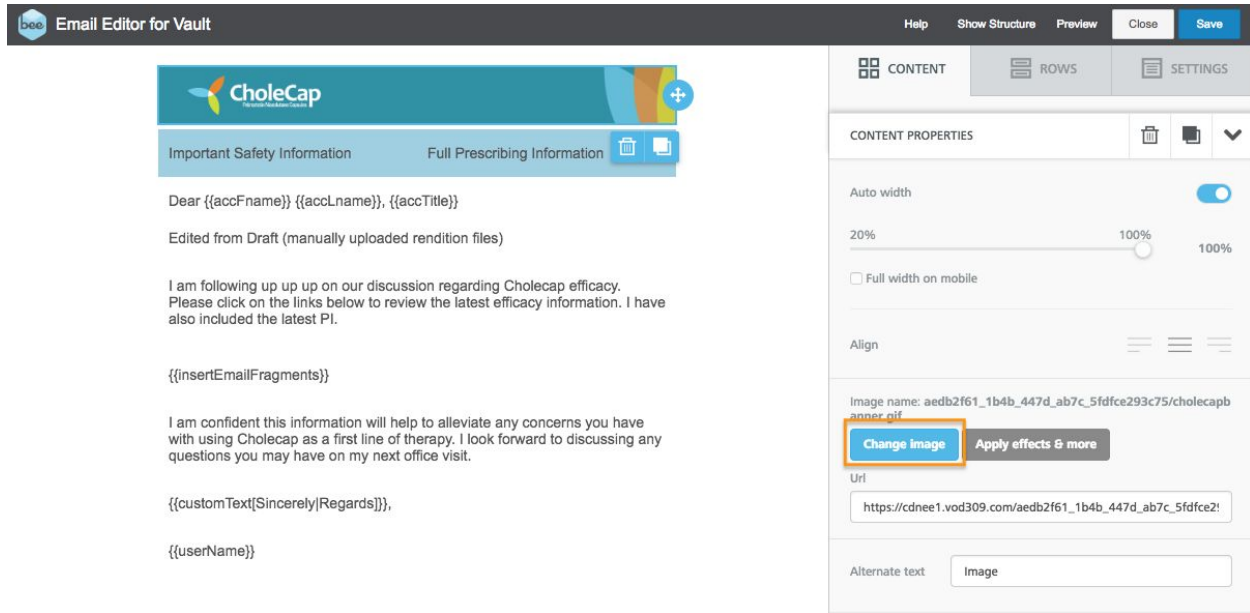
5. Click 'Next'. Enter at least all required information for the Email Template and click 'Save'
6. On the right-hand pane
  - a. Click the '+' icon next to the 'Renditions' section.
  - b. Choose 'Email Editor' for the rendition type.
  - c. Select 'Choose' and navigate to the JSON document of the Email Template and select it.
  - d. Click 'Upload'.



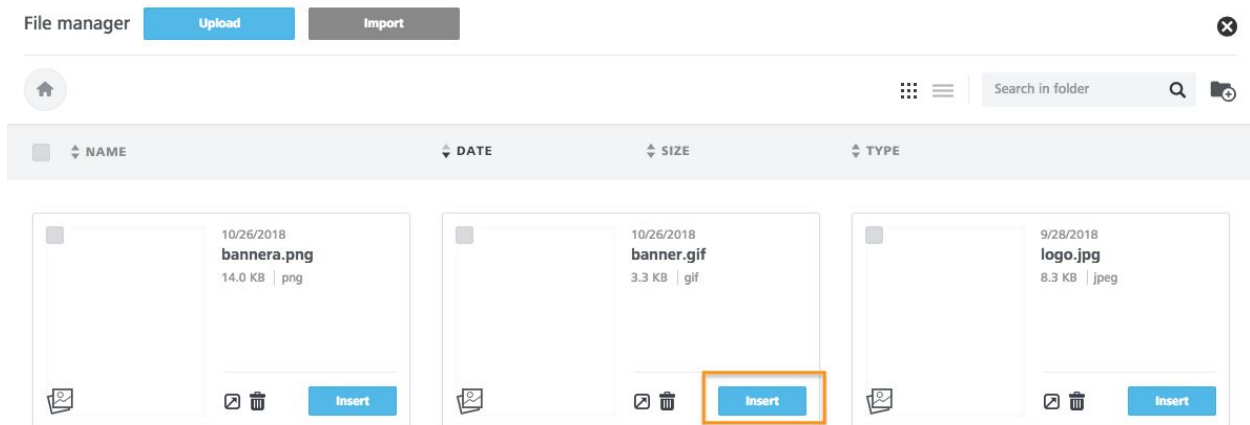
5. Click the gear icon in the top-right corner of the screen -> Edit Email



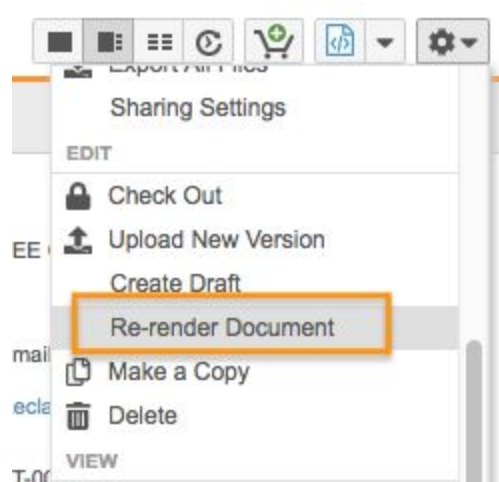
6. The following steps must be repeated for every image that exists in the Email Template
  - a. Select the image element and in the right-hand pane, choose 'Change Image'



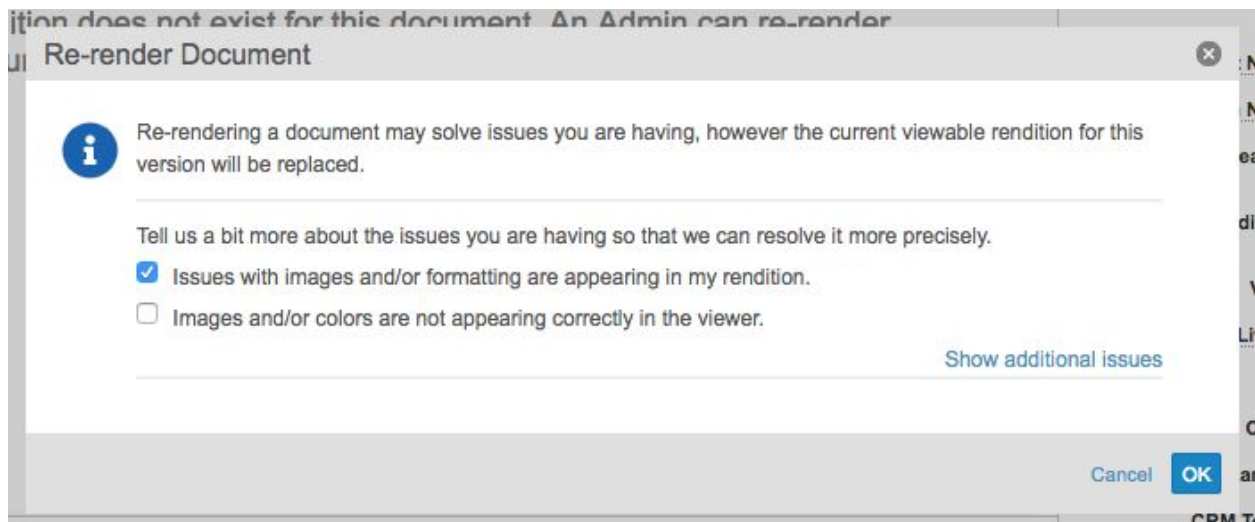
- b. From the BEE File manager, click 'Upload' and upload the image that is being changed to the BEE image library. Once the image is uploaded, it will be available in the BEE File Manager. Select 'Image' on the tile of the newly uploaded image.



7. Click 'Save'
8. Notice that the viewable rendition will not exist for the document. Click the gear icon in the top right corner of the screen and select Re-render Document.



On the Re-render Document popup, check the option that says 'Issues with images and/or formatting are appearing in my rendition.' Click 'OK'.



8. One more time, click the gear icon in the top right corner of the screen and select Re-render Document. This time, on the re-render document popup, check the option that says 'It looked better before. Restore the default settings.' Click 'OK'.

The rendition will now be viewable in the customer Vault.

Content admins can further edit the email template or move it to Staged/ Approved state, sync it to CRM and then test the email template by sending it to test recipients.