Closed Loop Marketing (CLM) Guide

Your guide to managing HTML materials and interactive PowerPoints in Veeva PromoMats and CRM

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Introduction

Purpose and scope

This document has been created by Ministry of Fish to provide comprehensive guidance and support to Otsuka employees throughout the CLM content creation process.

CLM plays a crucial role in Otsuka's marketing efforts, empowering employees to create personalised, data-driven interactions with customers.

To create and manage CLM presentations, you need access to Veeva Vault, either as an administrator or a user with appropriate permissions.

The CLM process encompasses various stages, including content creation, uploading, testing and presentation creation - within the Customer Relationship Management (CRM) system.

This document provides step-by-step guidance on each stage. Should you require further support, however, please don't hesitate to contact Ministry of Fish:

01962 864888
otsuka@ministryoffish.com

Don't forget to check out the Appendix, for useful hints and tips.

CLM Content

HTML vs PowerPoint

When it comes to creating CLM content, you have the option to choose between HTML and PowerPoint formats. Each format has its own set of advantages and considerations.

HTML

- **Flexibility and Interactivity:** HTML-based content provides greater flexibility and interactivity compared to PowerPoint. With HTML, you can incorporate dynamic elements, interactive features, animations, and data integrations, allowing for a more engaging and personalised user experience.
- **Responsive Design:** HTML content can be designed to be responsive, meaning it adapts to different screen sizes and devices. This ensures that the content is accessible and optimised for various platforms, including desktops, tablets, and mobile devices.
- **Data Capture and Integration:** HTML allows for seamless data capture and integration with external systems. You can incorporate forms, surveys, and data capture fields within your content and easily transmit the collected data to your CRM platform or other databases.
- **Customisation:** HTML provides extensive customisation options, allowing you to create content, tailored to your specific requirements.

VS

PowerPoint

- **Ease of Use:** PowerPoint is a widely used presentation software that offers a familiar and user-friendly interface. It provides a straightforward way to create slide-based content, making it accessible to users with varying technical skills.
- **Standardisation:** PowerPoint follows a standardised format, making it easier to maintain consistency across presentations. It offers predefined templates, themes, and layouts, ensuring a uniform visual style and structure.
- **Ease of Editing:** PowerPoint allows for easy editing and updating of content. Users can quickly modify slides, add, or remove content and make visual adjustments, without the need for advanced coding or development skills.
- **Offline Accessibility:** PowerPoint presentations can be downloaded and accessed offline, which can be beneficial in situations where an internet connection and Veeva CRM may not be available.

Summary

Introduction | CLM Content | HTML Presentations | PowerPoint Presentations | Creating Custom CRM Presentations | Profiling | Appendix

HTML vs PowerPoint

When it comes to creating CLM content, you have the option to choose between HTML and PowerPoint formats. Each format has its own set of advantages and considerations.

Summary

	HTML	PowerPoint
PROS	• More scope for creativity • Greater interactivity • Greater data collection • Links to other Veeva multi-channel presentations (MCP) content	• Simpler to create • Quicker to produce • Reduced cost
CONS	• Must be coded, so more reliance on agencies • Takes longer to produce • More costly	• Not as flexible as HTML • Limited interactivity • Less specific data collection

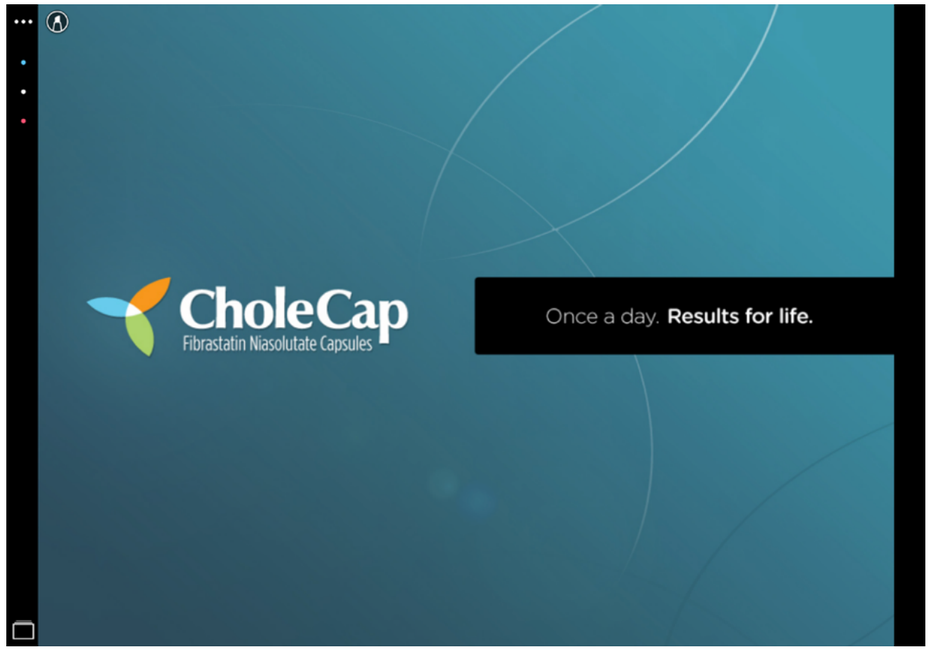
Reaction buttons

When presenting CLM content, users are able to capture customer reactions to each slide - helping you to determine the most engaging content and aiding the development of future presentations, with more targeted content.

There are three reaction buttons to choose from:

- Top blue button: denotes a positive reaction
- Middle white button: denotes a neutral reaction
- Bottom red button: denotes a negative reaction

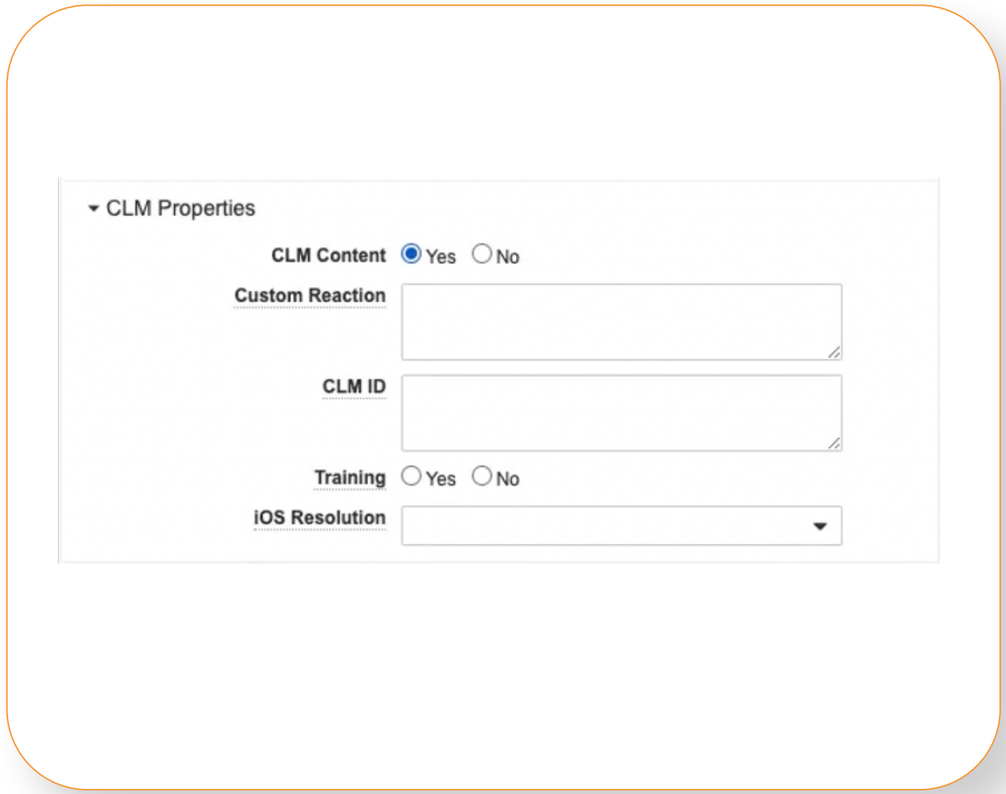
Note: Reaction buttons are set at a user level and therefore cannot be turned on and off for specific presentations.



Auto-Publishing

Auto publishing allows you to share your Vault materials to Veeva CRM as CLM content, which in turn allows your field teams to access and share the content as appropriate.

After creating and approving content in Vault, access the metadata and under ‘CLM Properties’ select ‘Yes’ for ‘CLM Content’. Once your Veeva CRM account has been synced, you will then be able to access this content within it.

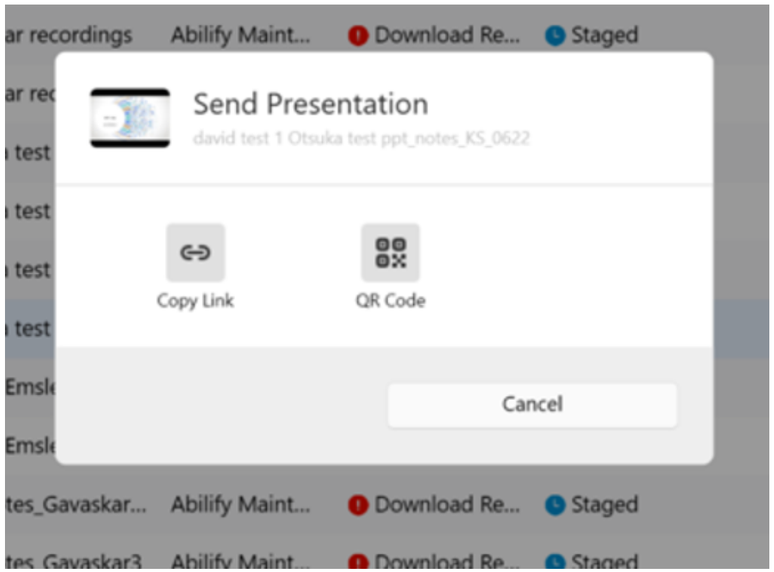


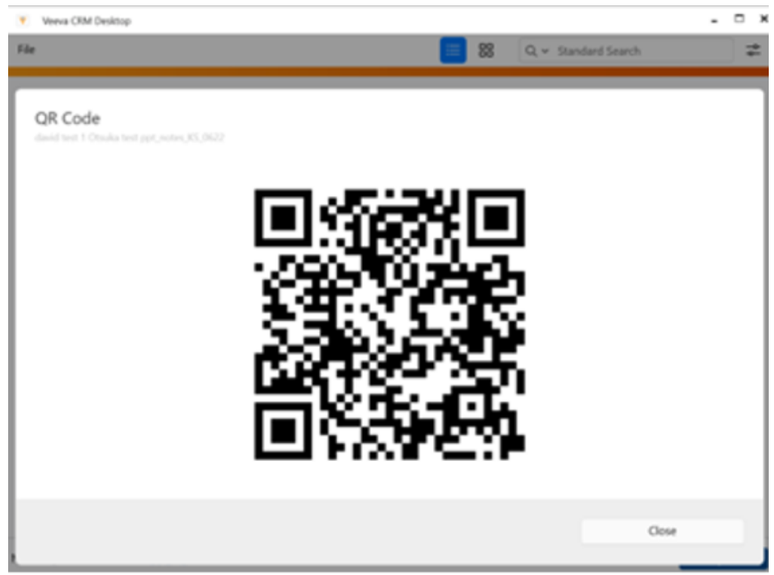
Sharing CLM content

Using the Veeva CRM app, you can generate and share CLM content through a link or QR code. In your media library, click the ***"More Actions"*** button above the approved presentation you want to share. Choose ***"Send Presentation"*** to explore sharing options.

Important points to note:

- Web links don't have an expiration date, so they won't disappear over time
- If the content linked to the URL expires after you've generated the link, attempting to use the link will result in an error message, and the link won't work





HTML Presentations

As CLM Content

Call Clickstream

Collecting valuable customer insights...

- **What is Call Clickstream?:** Call Clickstream is a digital tracking system that records how end users interact with HTML CLM presentations. It keeps track of the actions they take, such as clicking on slides, selecting buttons, submitting forms and other engagements. By analysing this data, you can gain insights into user behaviour and preferences, which can guide marketing strategies and content improvements.

- **When to use Call Clickstream:**
  There are two main situations where Call Clickstream can be valuable:

  - **Deep content tracking:** When you have complex interactive content that spans multiple slides, Call Clickstream gives a comprehensive view of how users engage with different elements and helps you optimise your content accordingly.
  - **Additional data collection:** If you need to gather more information beyond the standard key messages, duration, and sentiment tracking that comes with standard Veeva tracking. Unlike surveys, which may interrupt the flow of the presentation, Call Clickstream allows you to collect user input seamlessly without causing any disruptions.

How to upload HTML presentations

Step ❶ Files required for upload

Your agency should provide you with the following files for upload:

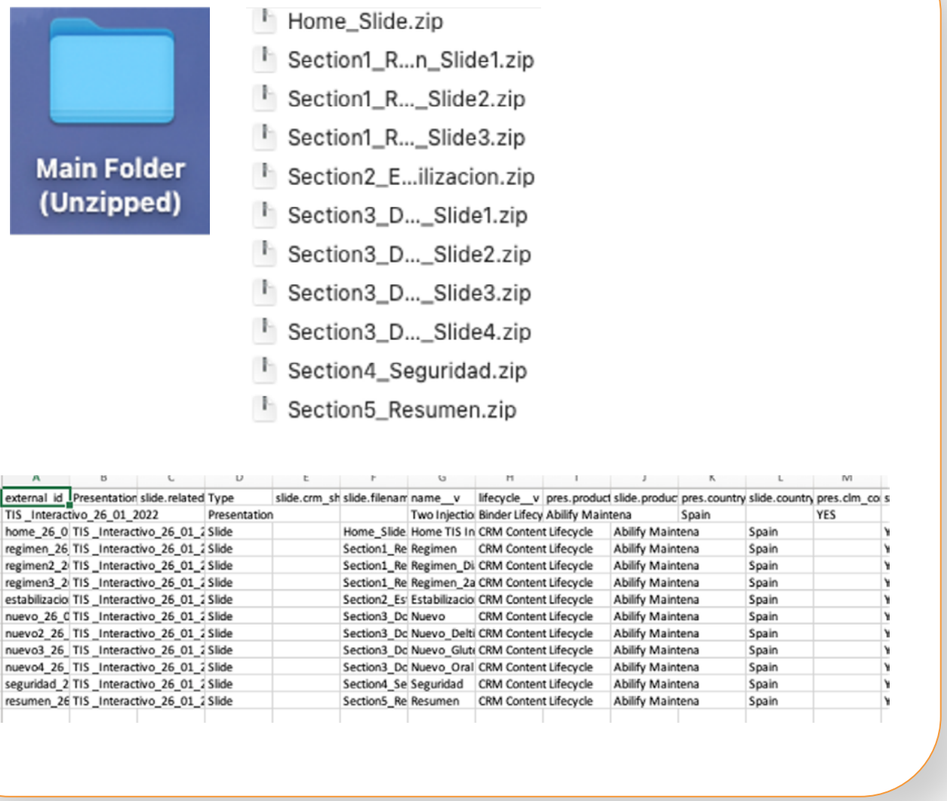
- packaged up HTML files (a folder containing individual .zip files for each slide)
- .csv file (a spreadsheet in .csv format)

The .csv file requires complete accuracy for a smooth upload process. Please **do not** alter the slide filenames (column G) as these need to match the HTML files provided and will cause errors if they differ. You **can** alter the following details, by opening the .csv file using Excel:

- Name of the presentation - this appears in columns A, C, H, T and X
- Name of the individual slides - columns H and Y

Even if you are updating an existing presentation, we recommend that it is uploaded to Veeva as a new presentation (ie with new presentation, slide and file names) and that you expire the old one. **Please note that this is updated advice**.

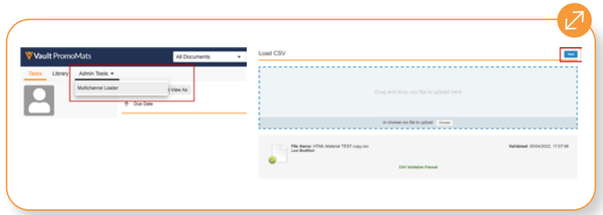
Ministry of Fish can provide a .csv template should you wish to create your own .csv.



	A	B	C	D	E	F	G	H	I	J	K	L	M	
1	external_id	Presentation	slide.related	Type	slide.crm_sh	slide.filenam	name__v	lifecycle__v	pres.product	slide.produc	pres.country	slide.country	pres.clm_co	s
2	TIS _Interactivo_26_01_2022			Presentation									YES	
3	home_26_0	TIS _Interactivo_26_01_2		Slide		Home_Slide	Home TIS In	CRM Content Lifecycle		Abilify Maintena		Spain		Y
4	regimen_26	TIS _Interactivo_26_01_2		Slide		Section1_Re	Regimen	CRM Content Lifecycle		Abilify Maintena		Spain		Y
5	regimen2_2	TIS _Interactivo_26_01_2		Slide		Section1_Re	Regimen_Di	CRM Content Lifecycle		Abilify Maintena		Spain		Y
6	regimen3_2	TIS _Interactivo_26_01_2		Slide		Section1_Re	Regimen_2a	CRM Content Lifecycle		Abilify Maintena		Spain		Y
7	estabilizacio	TIS _Interactivo_26_01_2		Slide		Section2_Es	Estabilizacio	CRM Content Lifecycle		Abilify Maintena		Spain		Y
8	nuevo_26_0	TIS _Interactivo_26_01_2		Slide		Section3_Dc	Nuevo	CRM Content Lifecycle		Abilify Maintena		Spain		Y
9	nuevo2_26_	TIS _Interactivo_26_01_2		Slide		Section3_Dc	Nuevo_Delti	CRM Content Lifecycle		Abilify Maintena		Spain		Y
10	nuevo3_26_	TIS _Interactivo_26_01_2		Slide		Section3_Dc	Nuevo_Glut	CRM Content Lifecycle		Abilify Maintena		Spain		Y
11	nuevo4_26_	TIS _Interactivo_26_01_2		Slide		Section3_Dc	Nuevo_Oral	CRM Content Lifecycle		Abilify Maintena		Spain		Y
12	seguridad_2	TIS _Interactivo_26_01_2		Slide		Section4_Se	Seguridad	CRM Content Lifecycle		Abilify Maintena		Spain		Y
13	resumen_26	TIS _Interactivo_26_01_2		Slide		Section5_Re	Resumen	CRM Content Lifecycle		Abilify Maintena		Spain		Y
14														

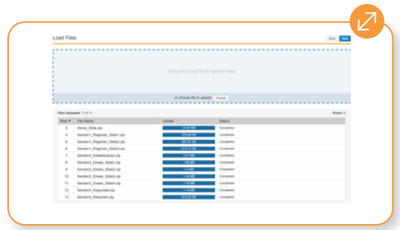
Step 2 Uploading your .csv file

Open ***'Admin Tools'*** from the toolbar and select ***'Multichannel Loader'***. Then drag and drop your .csv file into the designated area. Veeva Vault will then validate your .csv – once it has passed, click ***Next*** in the top right-hand corner.

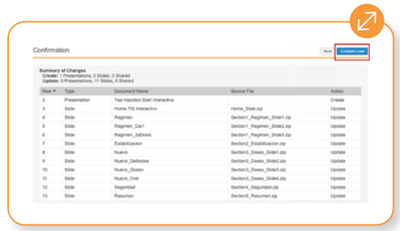


Step 3 Uploading your HTML .zip files

The next page requires the .zip files that Veeva is expecting – drag and drop the supplied into the designated area. Once uploaded, the status for each file should read "Completed."



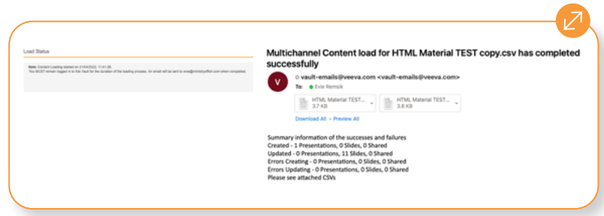
When completed, click '***Next'*** in the top right-hand corner.



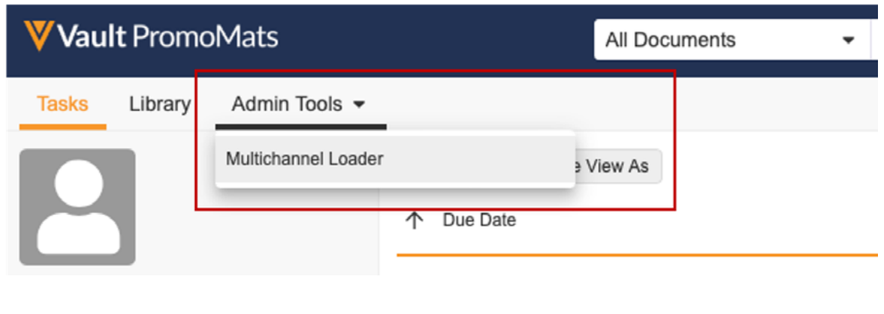
An 'Action' column now appears and you simply need to click on '***Complete Load***' in the right-hand corner.

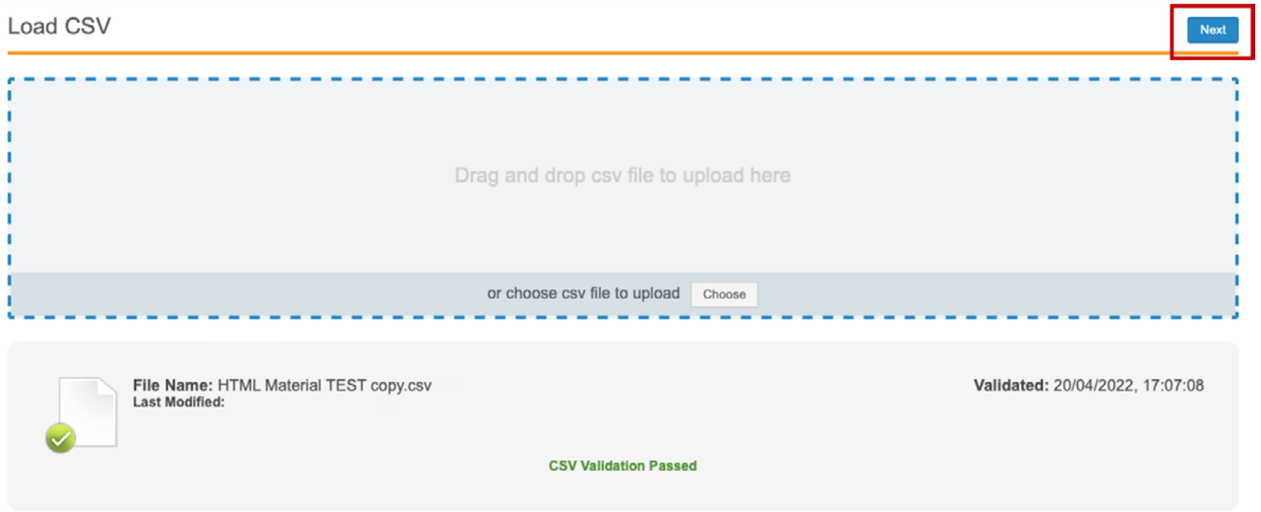
Step 4 Confirmation

Lastly, you will receive an email detailing whether the upload was successful or not. If the email states that there were errors, creating or updating the presentation, please contact your agency. Once you have received an email detailing a successful upload, you will be able to publish, sync and test in your presentation.



If error messages appear during any of these steps, please contact your agency.


Vault PromoMats
All Documents
Tasks
Library
Admin Tools
Multichannel Loader
View As
Due Date


Load CSV
Next
Drag and drop csv file to upload here
or choose csv file to upload
Choose
File Name: HTML Material TEST copy.csv
Last Modified:
Validated: 20/04/2022, 17:07:08
CSV Validation Passed

Load Files

Back Next

Drag and drop file to upload here

or choose file to upload Choose

Files Uploaded: 11 of 11 **Errors:** 0

Row ▲	File Name	Upload	Status
3	Home_Slide.zip	14.48 MB	Completed
4	Section1_Regimen_Slide1.zip	576.69 KB	Completed
5	Section1_Regimen_Slide2.zip	597.61 KB	Completed
6	Section1_Regimen_Slide3.zip	610.74 KB	Completed
7	Section2_Estabilizacion.zip	3.41 MB	Completed
8	Section3_Doses_Slide1.zip	1.86 MB	Completed
9	Section3_Doses_Slide2.zip	1.2 MB	Completed
10	Section3_Doses_Slide3.zip	1.24 MB	Completed
11	Section3_Doses_Slide4.zip	1.19 MB	Completed
12	Section4_Seguridad.zip	1.19 MB	Completed
13	Section5_Resumen.zip	914.24 KB	Completed

Confirmation

Back | Complete Load

Summary of Changes
Create: 1 Presentations, 0 Slides, 0 Shared
Update: 0 Presentations, 11 Slides, 0 Shared

Row ▲	Type	Document Name	Source File	Action
2	Presentation	Two Injection Start Interactivo		Create
3	Slide	Home TIS Interactivo	Home_Slide.zip	Update
4	Slide	Regimen	Section1_Regimen_Slide1.zip	Update
5	Slide	Regimen_Dia1	Section1_Regimen_Slide2.zip	Update
6	Slide	Regimen_2aDosis	Section1_Regimen_Slide3.zip	Update
7	Slide	Estabilizacion	Section2_Estabilizacion.zip	Update
8	Slide	Nuevo	Section3_Doses_Slide1.zip	Update
9	Slide	Nuevo_Deltiodes	Section3_Doses_Slide2.zip	Update
10	Slide	Nuevo_Gluteo	Section3_Doses_Slide3.zip	Update
11	Slide	Nuevo_Oral	Section3_Doses_Slide4.zip	Update
12	Slide	Seguridad	Section4_Seguridad.zip	Update
13	Slide	Resumen	Section5_Resumen.zip	Update

Load Status

Note: Content Loading started on 21/04/2022, 11:41:38.
You MUST remain logged in to this Vault for the duration of the loading process. An email will be sent to evie@ministryoffish.com when completed.

Multichannel Content load for HTML Material TEST copy.csv has completed successfully

V

vault-emails@veeva.com <vault-emails@veeva.com>

To: Evie Remsik

HTML Material TEST... 3.7 KB

HTML Material TEST... 3.8 KB

Download All • Preview All

Summary information of the successes and failures
Created - 1 Presentations, 0 Slides, 0 Shared
Updated - 0 Presentations, 11 Slides, 0 Shared
Errors Creating - 0 Presentations, 0 Slides, 0 Shared
Errors Updating - 0 Presentations, 0 Slides, 0 Shared
Please see attached CSVs

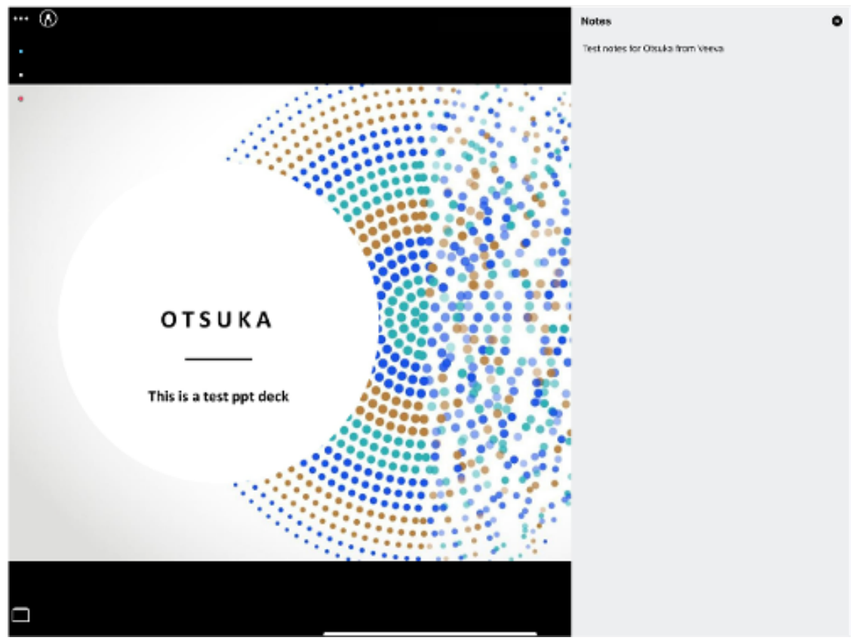
PowerPoint Presentations

As CLM Content

Slide notes

When added prior to upload, PowerPoint presentation notes can now be viewed whilst presenting in Veeva CRM - helping to provide more context for your Sales Teams and aiding their interactions with HCPs.

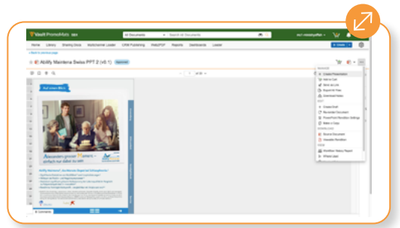
On iPads, you can activiate this by selecting the ***'...'*** icon in the top left corner. On desktops, the slides notes are conveniently displayed below the presented slides.



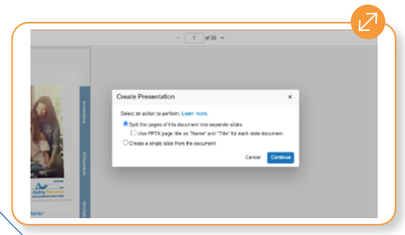
How to upload PowerPoint presentations

Step 1 Creating your presentation

Your PowerPoint presentation must be approved within Veeva PromoMats, prior to transferring it to Veeva CRM. Once approval has been given, click on the ***'...'*** icon in the top right had corner and select ***'Create Presentation'*** from the drop-down menu.



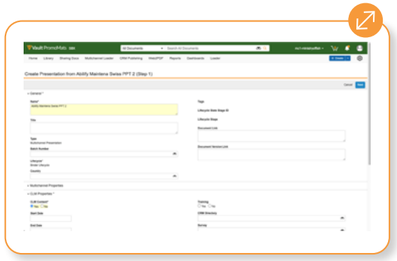
Within the pop-up message that appears, leave 'Split the pages of this document into separate slides' selected and click ***'Continue'.***



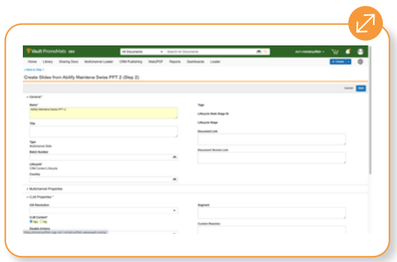
Step 2 Metadata

Input the necessary metadata for your presentation - fields highlighted in yellow must be completed. For ***'CLM Content'*** ensure you select the ***'Yes'*** button.

Once the metadata is completed, please click ***'Next'*** in the top right-hand corner

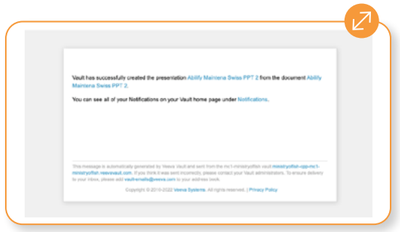


followed by ***'Start'***.



Step 3 Confirmation

Await an email confirmation to say that Vault has successfully created the presentation.

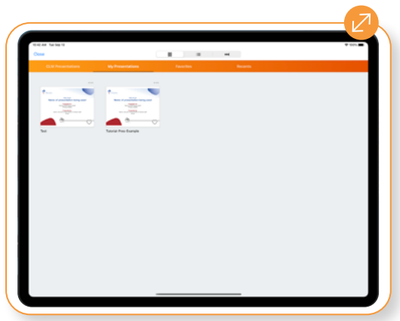


Step 4 Ensure functionality

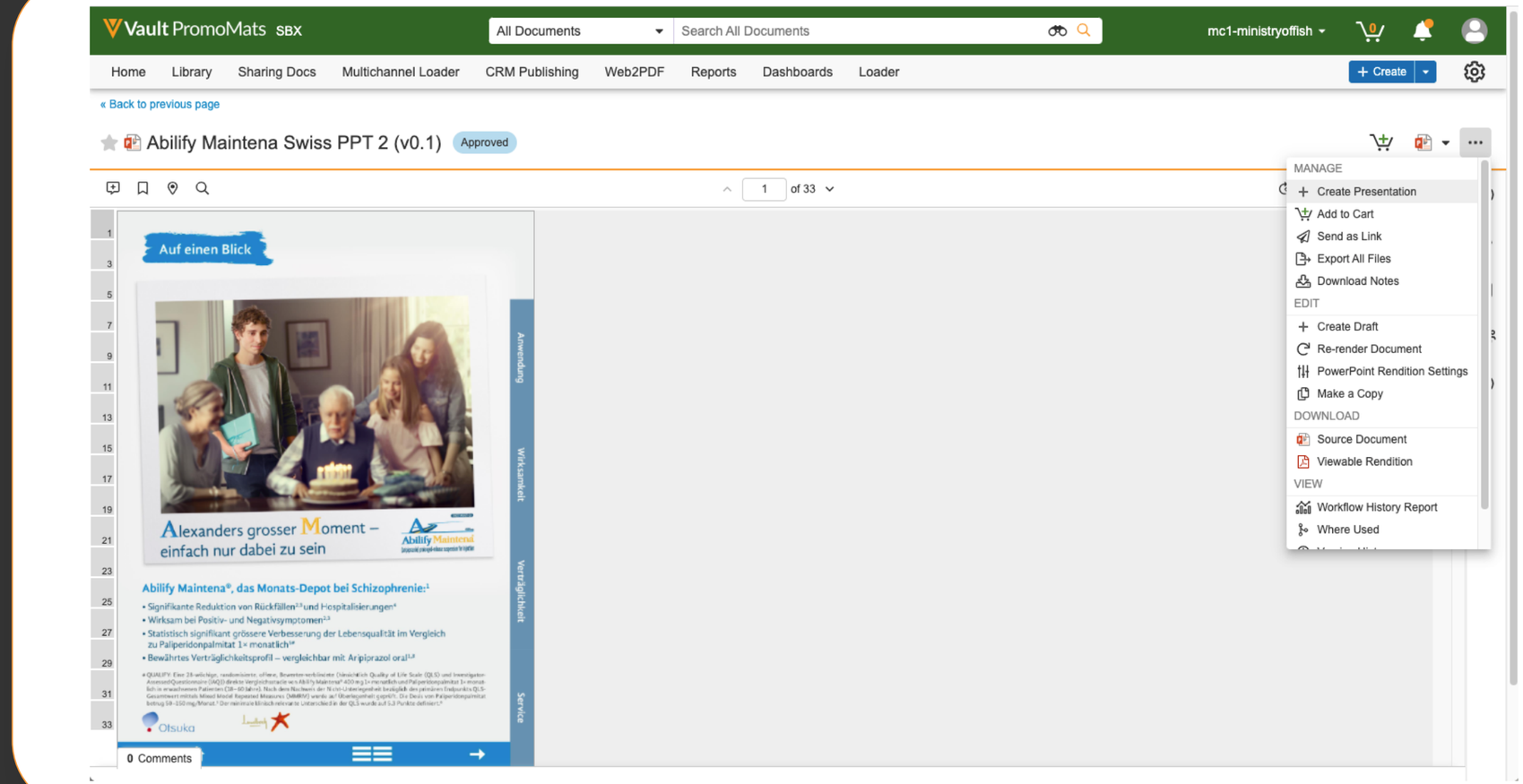
Within the metadata of each slide, you are able to use the ***'Disable Actions'*** field, should the functionality of your presentation require it. For example, if a presentation was created in portrait, rather than landscape, each slide will need to have ***'Rotation Lock'*** selected from the drop-down menu.

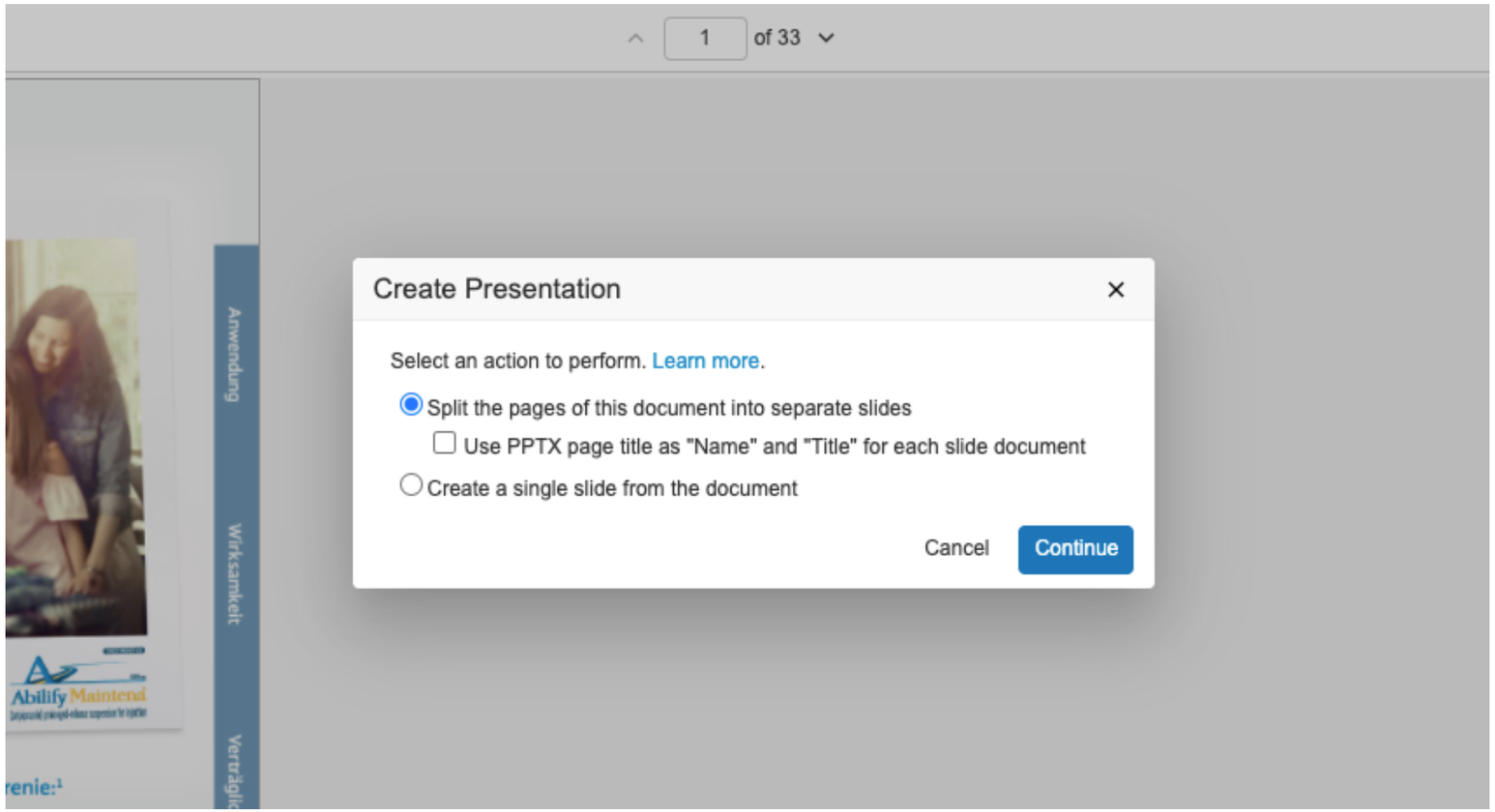
Step 5 Test your presentation

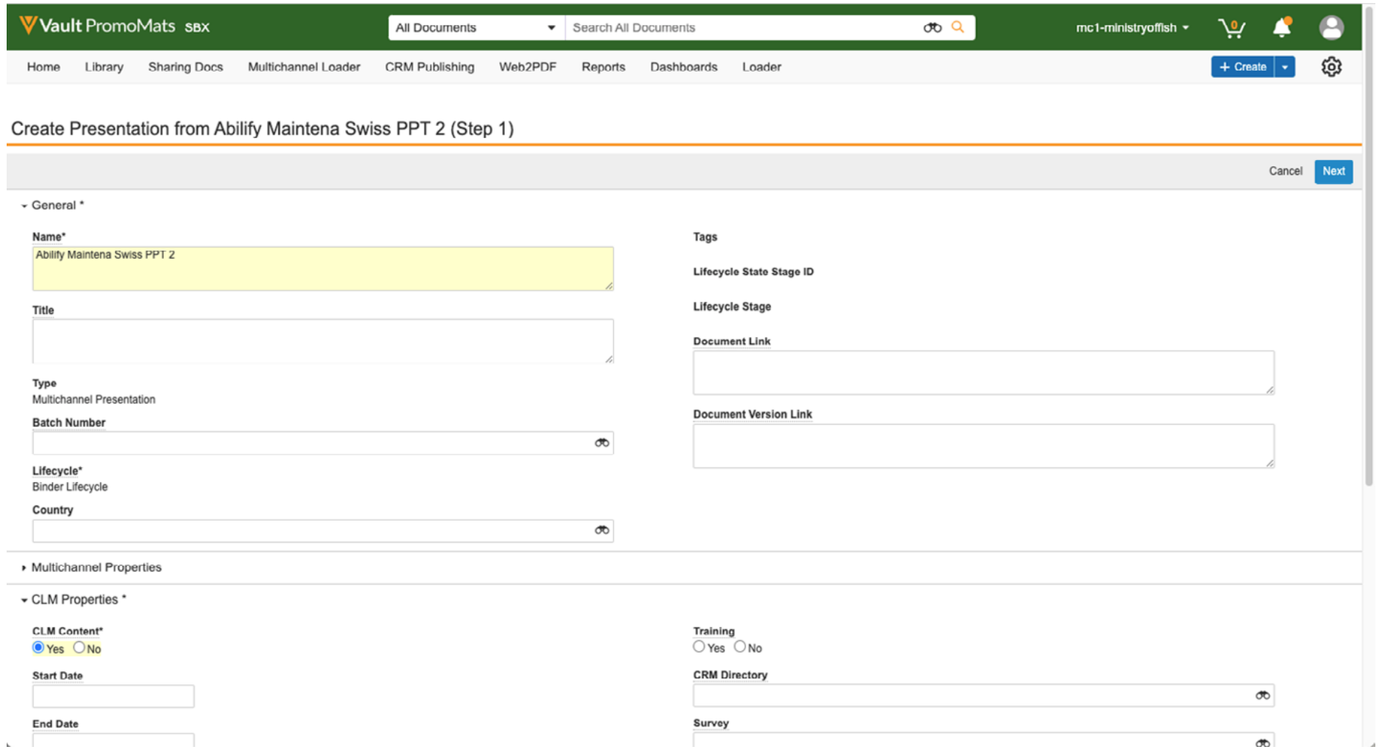
Approve each slide, as well as the presentation binder, before syncing in Veeva CRM and testing the material.



Tip: If viewing the presentation on Veeva desktop be sure to click on the play bottom in the bottom right-hand corner to open the presentation properly, otherwise your menu buttons will not work.


Vault PromoMats SBX
All Documents
Search All Documents
mc1-ministryoffish
Home
Library
Sharing Docs
Multichannel Loader
CRM Publishing
Web2PDF
Reports
Dashboards
Loader
+ Create
« Back to previous page
Abilify Maintena Swiss PPT 2 (v0.1)
Approved
1 of 33
MANAGE
Create Presentation
Add to Cart
Send as Link
Export All Files
Download Notes
EDIT
Create Draft
Re-render Document
PowerPoint Rendition Settings
Make a Copy
DOWNLOAD
Source Document
Viewable Rendition
VIEW
Workflow History Report
Where Used
Auf einen Blick
Alexanders grosser Moment – einfach nur dabei zu sein
Abilify Maintena®, das Monats-Depot bei Schizophrenie:1
• Signifikante Reduktion von Rückfällen2,3 und Hospitalisierungen4
• Wirksam bei Positiv- und Negativsymptomen2,3
• Statistisch signifikant grössere Verbesserung der Lebensqualität im Vergleich zu Paliperidonpalmitat 1× monatlich5*
• Bewährtes Verträglichkeitsprofil – vergleichbar mit Aripiprazol oral1,3
Otsuka
0 Comments
Anwendung
Wirksamkeit
Verträglichkeit
Service


1
of 33
Anwendung
Wirksamkeit
Verträglic
Abilify Maintena
renie:1
Create Presentation
Select an action to perform. Learn more.
Split the pages of this document into separate slides
Use PPTX page title as "Name" and "Title" for each slide document
Create a single slide from the document
Cancel
Continue


Vault PromoMats SBX
All Documents
Search All Documents
mc1-ministryoffish
Home
Library
Sharing Docs
Multichannel Loader
CRM Publishing
Web2PDF
Reports
Dashboards
Loader
+ Create
Create Presentation from Abilify Maintena Swiss PPT 2 (Step 1)
Cancel
Next
General *
Name*
Abilify Maintena Swiss PPT 2
Title
Type
Multichannel Presentation
Batch Number
Lifecycle*
Binder Lifecycle
Country
Tags
Lifecycle State Stage ID
Lifecycle Stage
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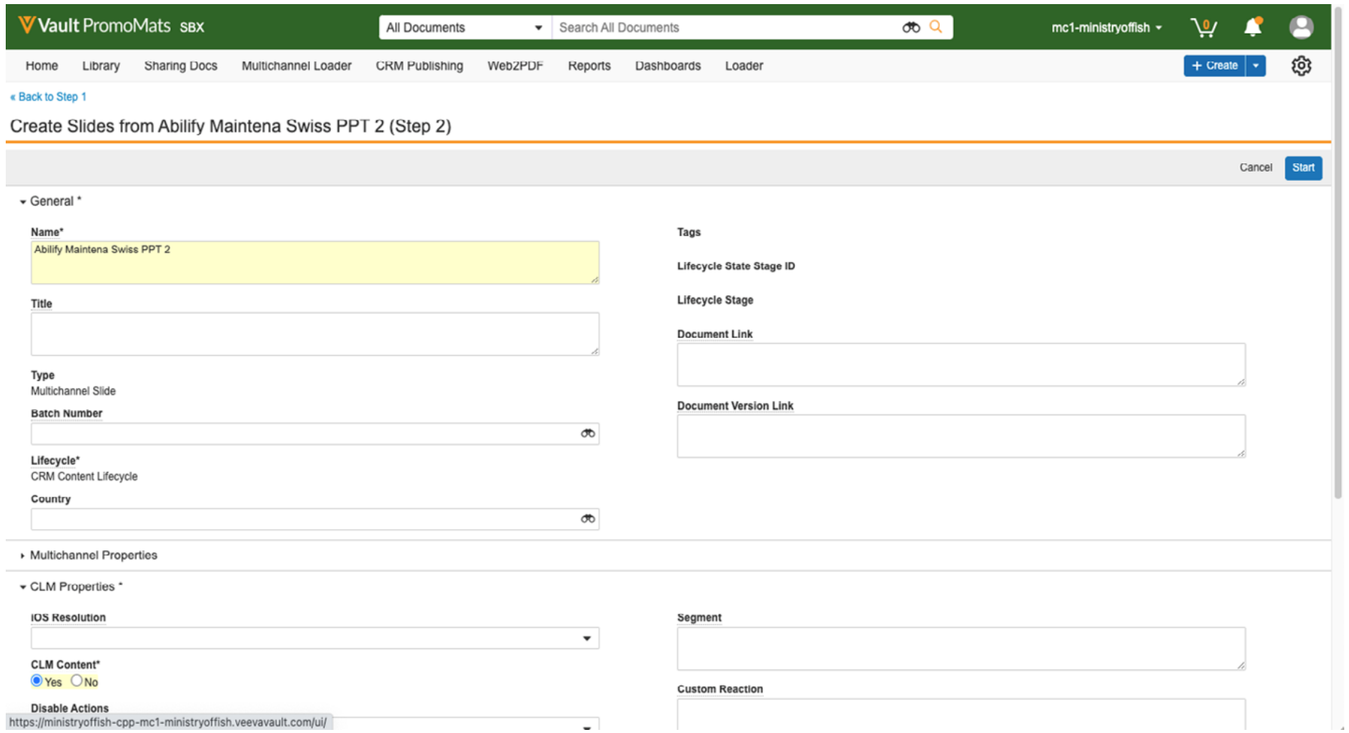
Yes
No
CRM Directory
Survey


Vault PromoMats SBX
All Documents
Search All Documents
mc1-ministryoffish
Home
Library
Sharing Docs
Multichannel Loader
CRM Publishing
WebZPDF
Reports
Dashboards
Loader
+ Create
« Back to Step 1
Create Slides from Abilify Maintena Swiss PPT 2 (Step 2)
Cancel
Start
General *
Name*
Abilify Maintena Swiss PPT 2
Title
Type
Multichannel Slide
Batch Number
Lifecycle*
CRM Content Lifecycle
Country
Tags
Lifecycle State Stage ID
Lifecycle Stage
Document Link
Document Version Link
Multichannel Properties
CLM Properties *
iOS Resolution
CLM Content*
Yes
No
Disable Actions
Segment
Custom Reaction
https://ministryoffish-cpp-mc1-ministryoffish.veevavault.com/ui/

Vault has successfully created the presentation Abilify Maintena Swiss PPT 2 from the document Abilify Maintena Swiss PPT 2.

You can see all of your Notifications on your Vault home page under Notifications.

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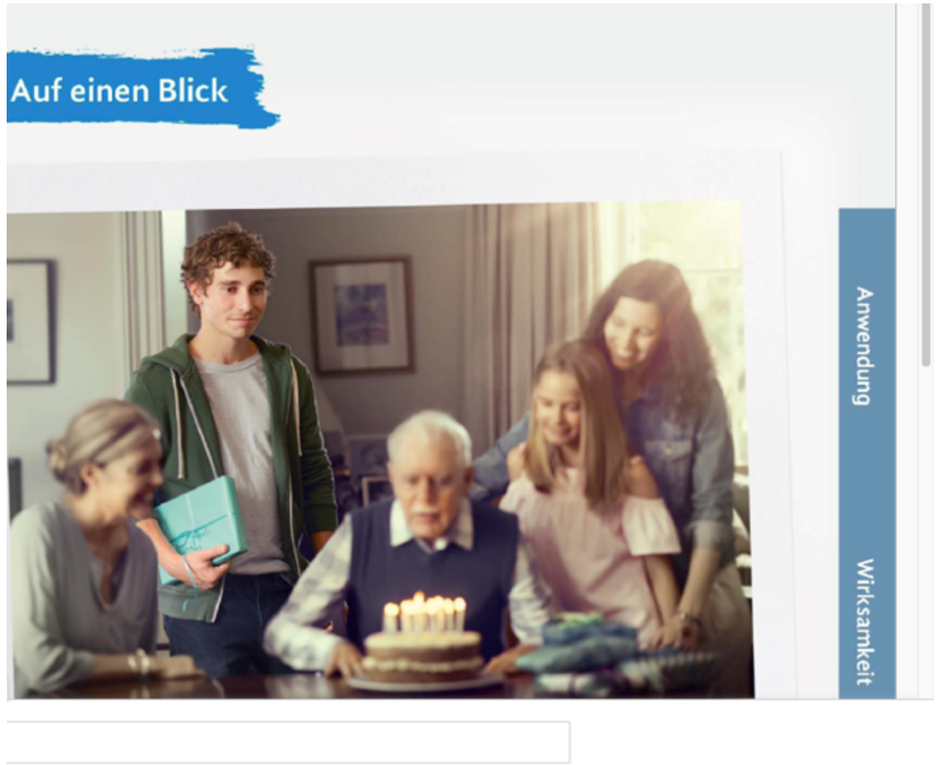
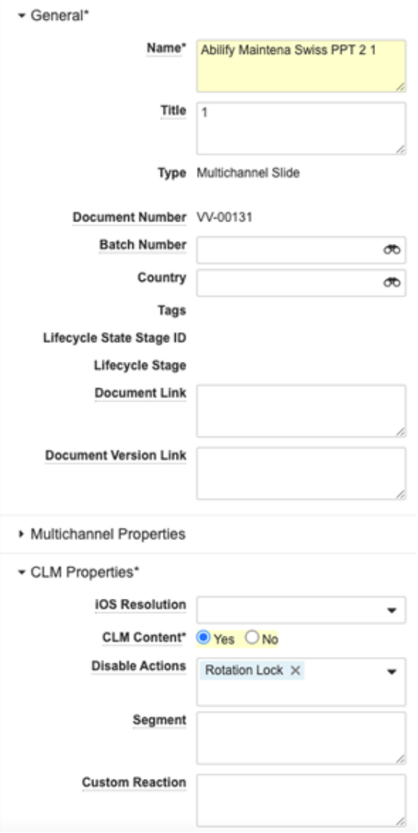

Auf einen Blick
Anwendung
Wirksamkeit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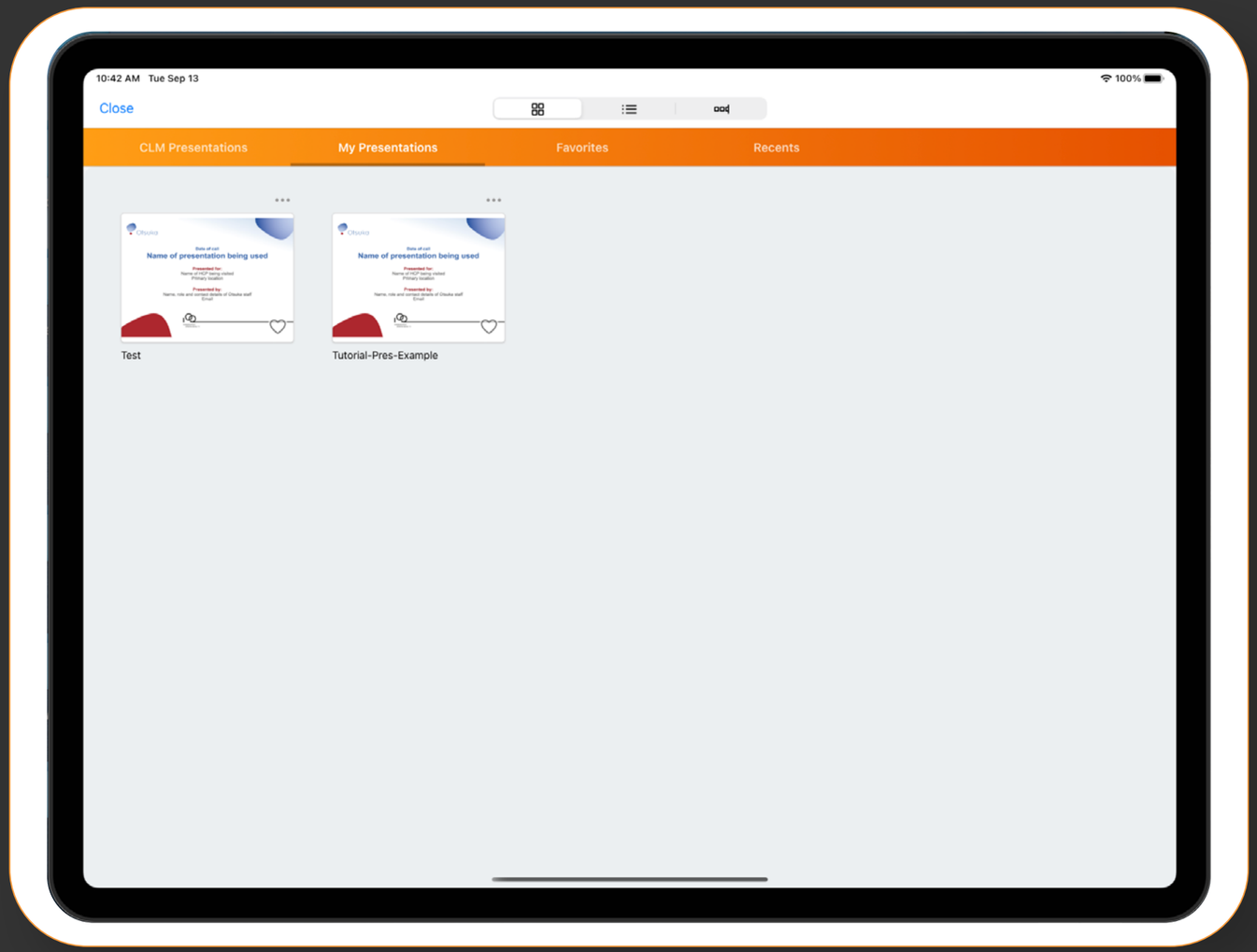
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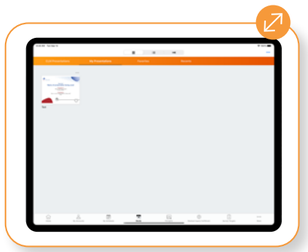
Close
CLM Presentations
My Presentations
Favorites
Recents
Name of presentation being used
Test
Name of presentation being used
Tutorial-Pres-Example

Creating Custom CRM Presentations

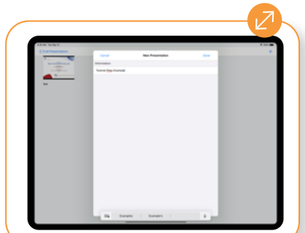
Custom presentation process

Step 1 Making your custom presentation

Once logged into Veeva CRM and having clicked on ***'Sync'*** in the top left corner of your Home screen, navigate to ***'Media'*** within the bottom menu bar. Then select ***'My Presentations'*** within the top bar; click ***'...'*** in the top right corner; and then click ***'Manage Presentations'***.

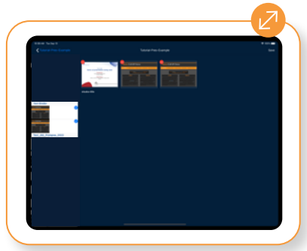


Click the ***'+'*** Icon in the top right corner to create a new presentation and give your new presentation a name, before clicking ***Done'***.



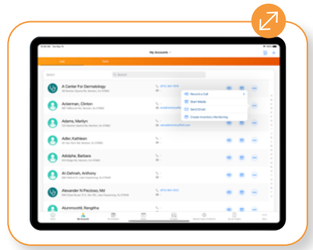
Step 2 Putting your presentation together

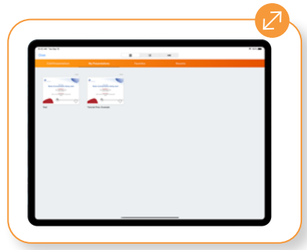
Select the slides you wish to include and then click ***'Save'***.

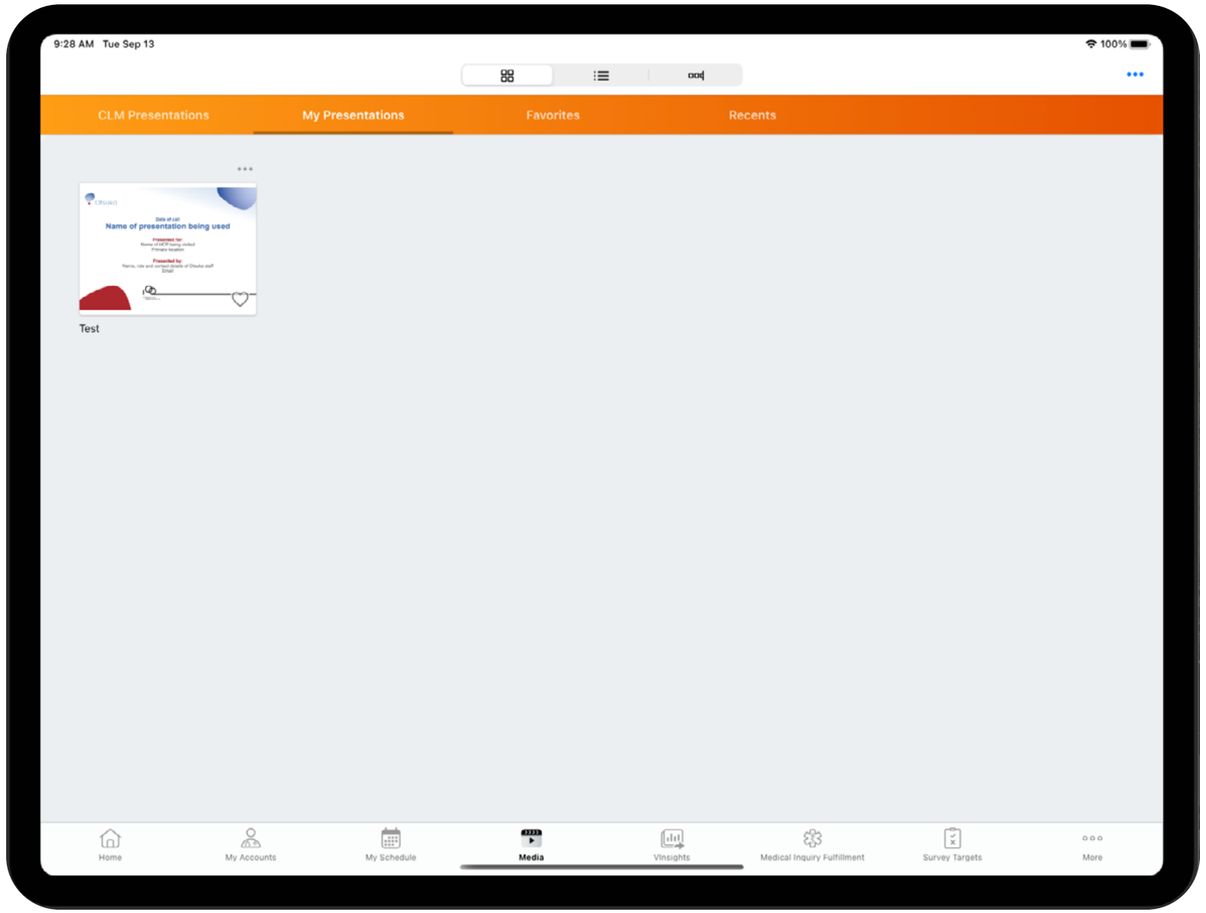


Step 3 Test your presentation

To test your custom presentation, first navigate to the ***'My Accounts'*** page, via the bottom menu bar. Select your preferred account to test from and click on the three dots at the end to select ***'Start Media'***. Select your presentation from the options available and ensure everything is working correctly.



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Favorites
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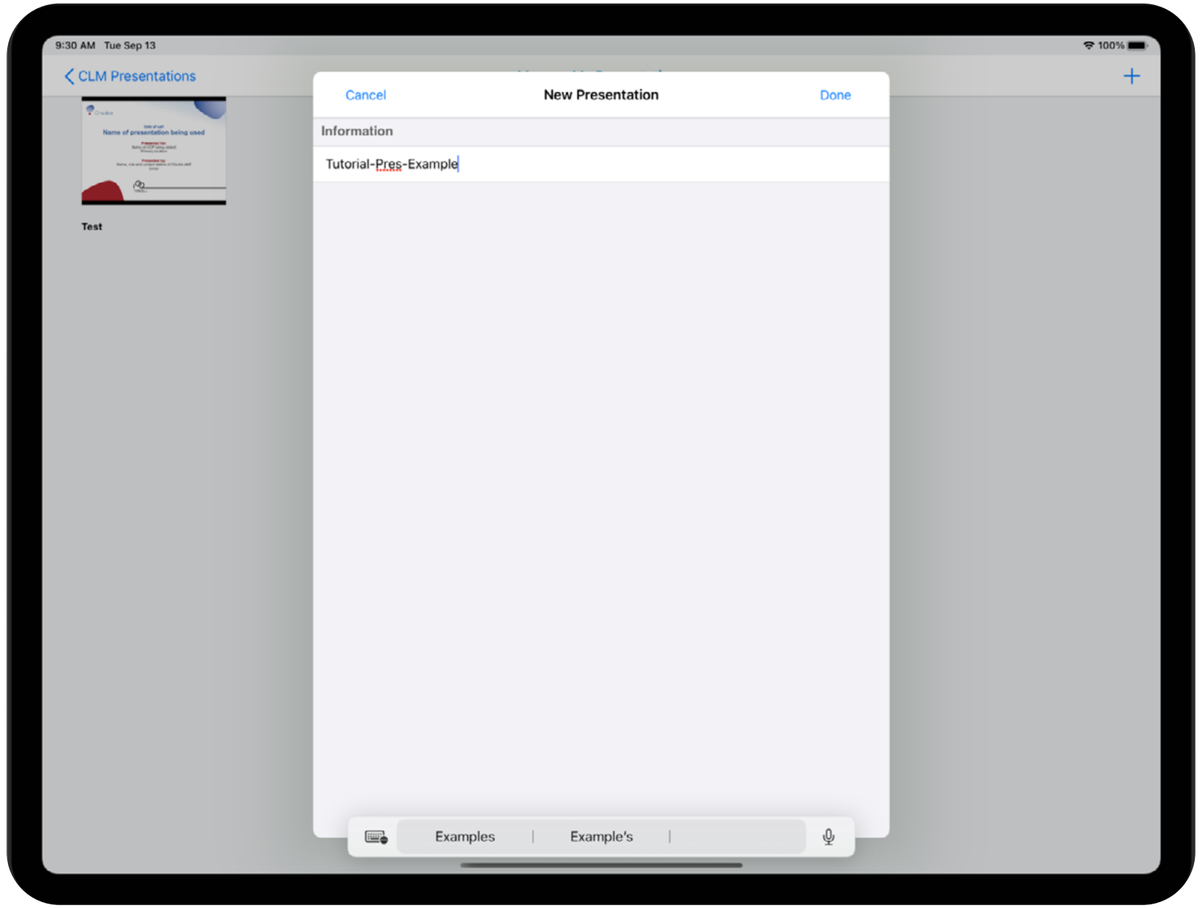
Test
Home
My Accounts
My Schedule
Media
Vinsights
Medical Inquiry Fulfillment
Survey Targets
More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Information
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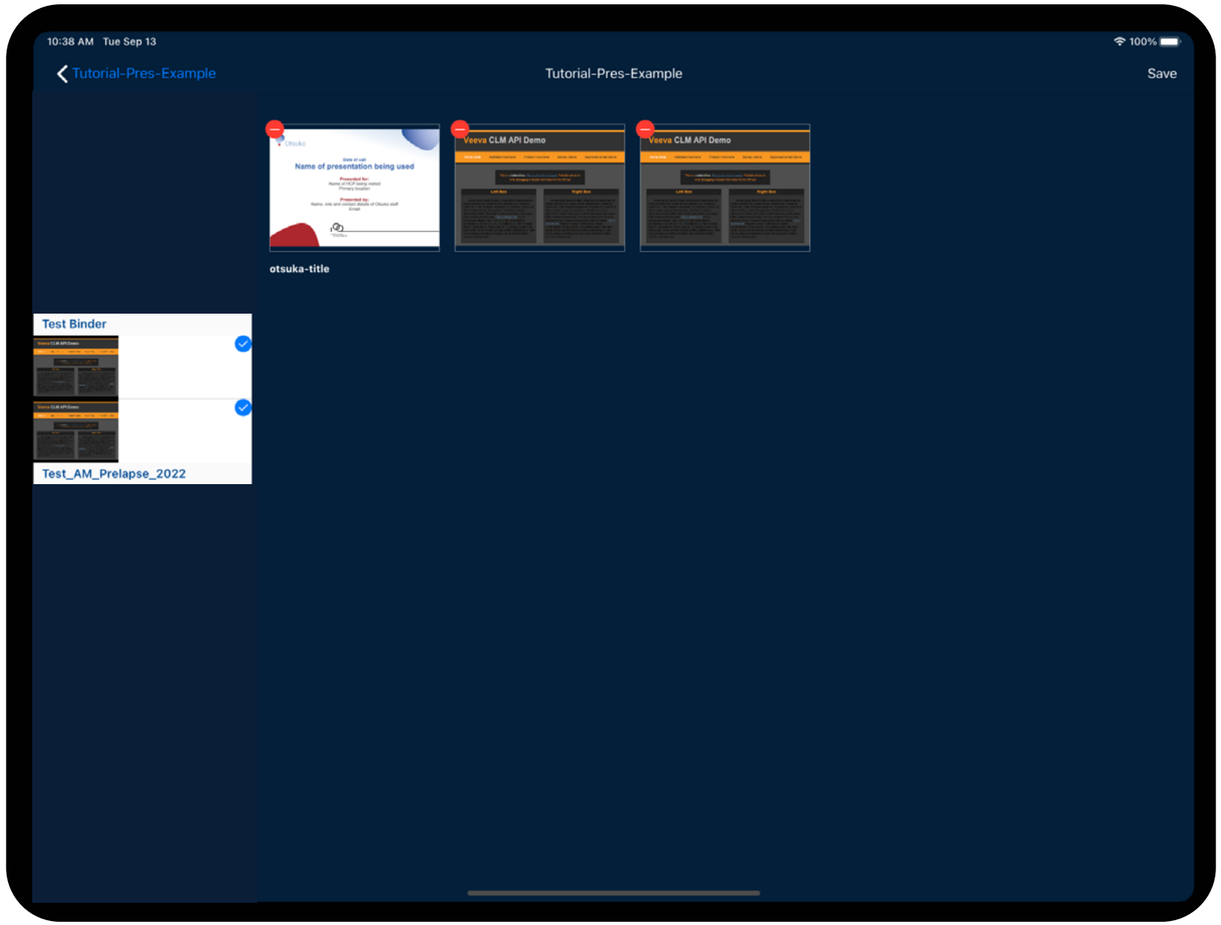
Example's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Tutorial-Pres-Example
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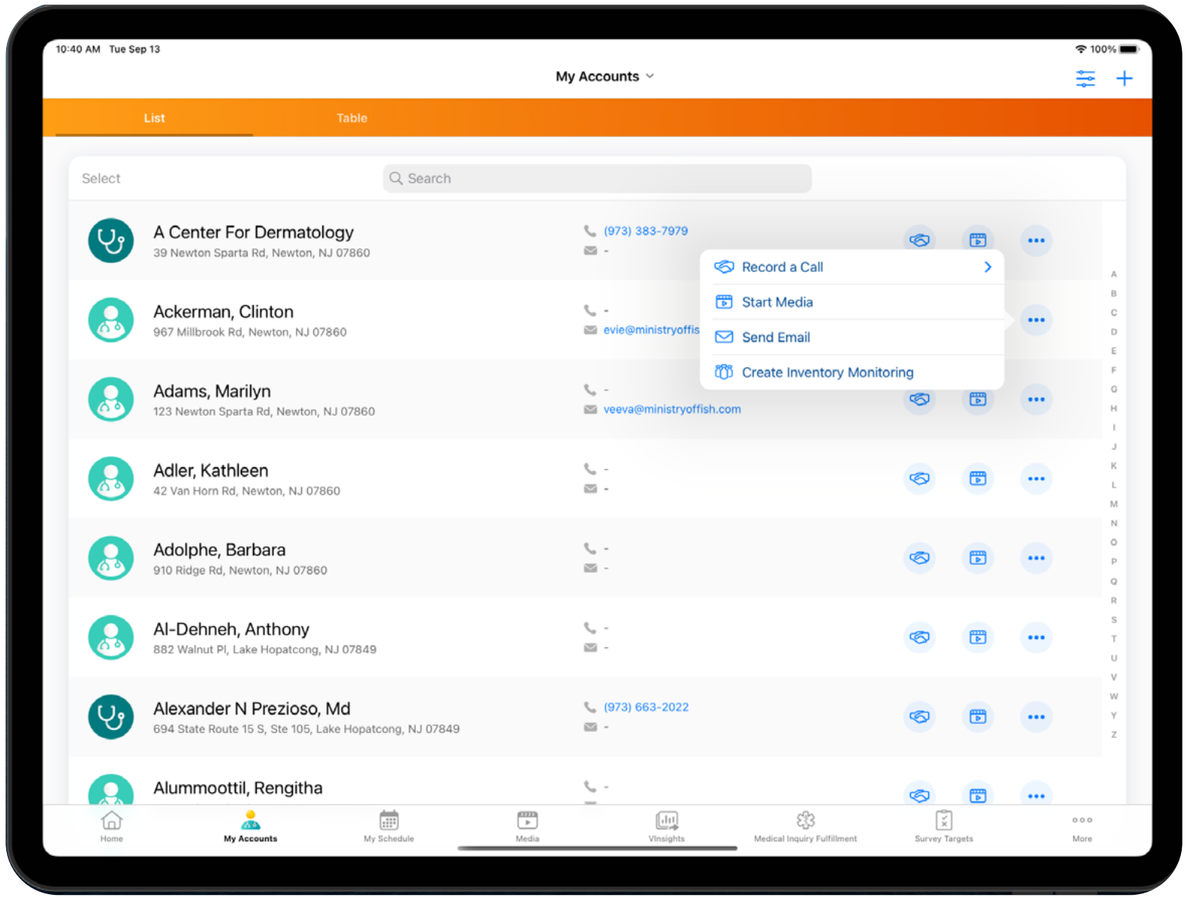
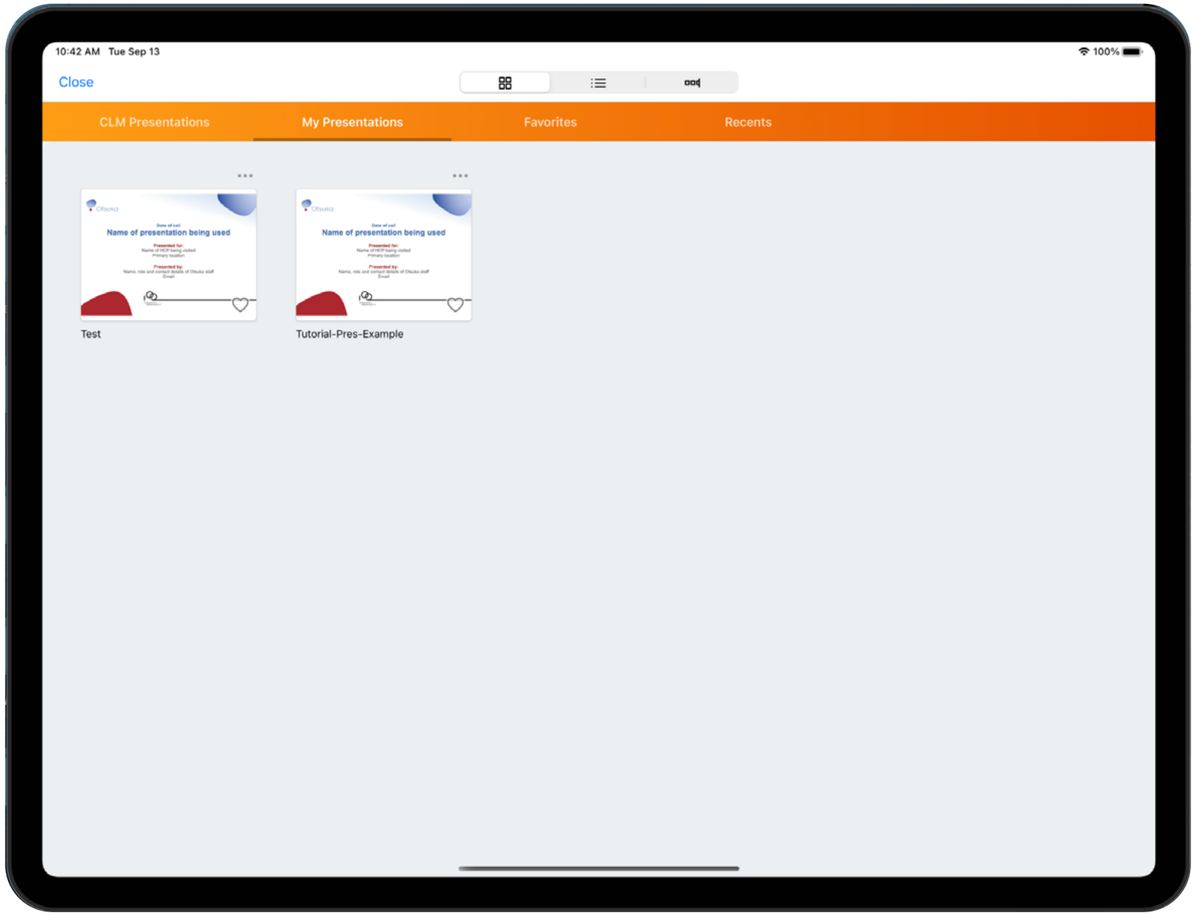
Veeva CLM API Demo
otsuka-title
Test Binder
Test_AM_Prelapse_2022


10:40 AM Tue Sep 13
100%
My Accounts
List
Table
Select
Search
A Center For Dermatology
39 Newton Sparta Rd, Newton, NJ 07860
(973) 383-7979
Record a Call
Start Media
Send Email
Create Inventory Monitoring
Ackerman, Clinton
967 Millbrook Rd, Newton, NJ 07860
Adams, Marilyn
123 Newton Sparta Rd, Newton, NJ 07860
veeva@ministryoffish.com
Adler, Kathleen
42 Van Horn Rd, Newton, NJ 07860
Adolphe, Barbara
910 Ridge Rd, Newton, NJ 07860
Al-Dehneh, Anthony
882 Walnut Pl, Lake Hopatcong, NJ 07849
Alexander N Prezioso, Md
694 State Route 15 S, Ste 105, Lake Hopatcong, NJ 07849
(973) 663-2022
Alummoottil, Rengitha
Home
My Accounts
My Schedule
Media
Vinsights
Medical Inquiry Fulfillment
Survey Targets
More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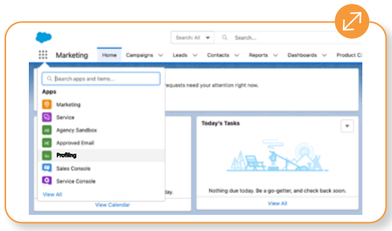
Close
CLM Presentations
My Presentations
Favorites
Recents
Name of presentation being used
Test
Name of presentation being used
Tutorial-Pres-Example

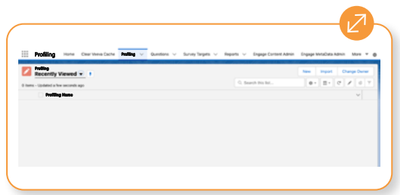
Profiling - Implementing Embedded Surveys

Profiling process

Step 1 Create a profile

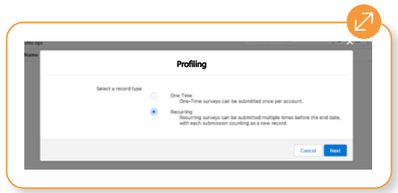
Sign into Salesforce and navigate to ***'Profiling'*** via the top left menu icon. Then click on the ***'Profiling'*** tab in the top bar, followed by the ***'New'*** button.





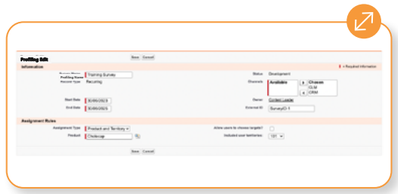
Step 2 Select a record type

Click on ***'Recurring'*** (this allows you to use the Profiling more than once) and click ***'Next'.***



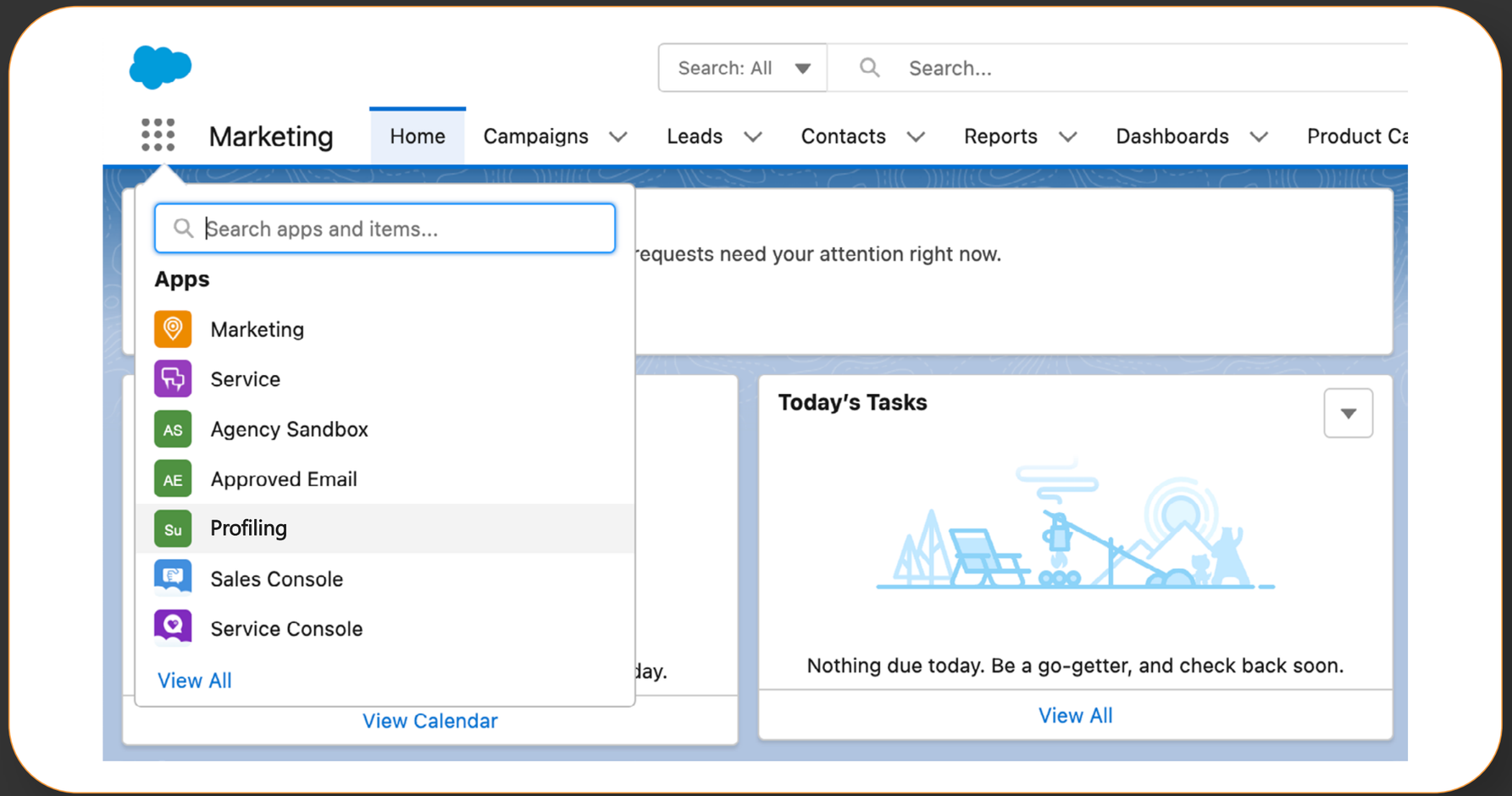
Step 3 Edit profiling

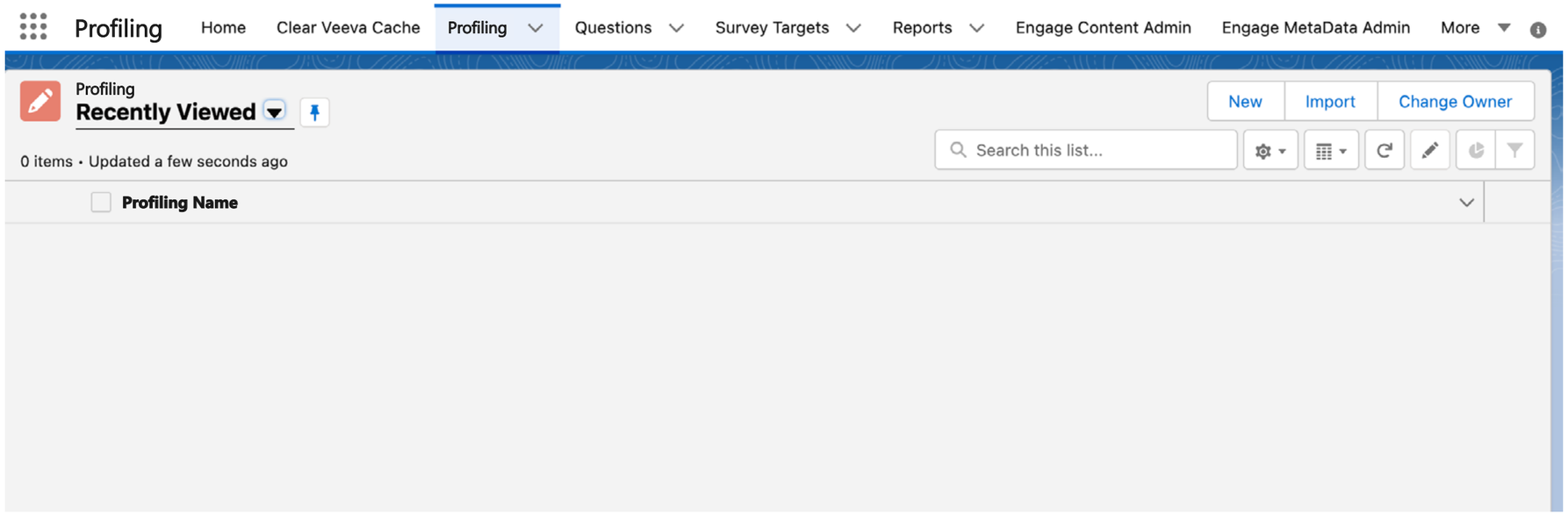
The 'Profiling Edit' will appear next - fill out the information accordingly, being sure that the external ID you've selected is unique and case sensitive. Click ***'Save'*** once finished.

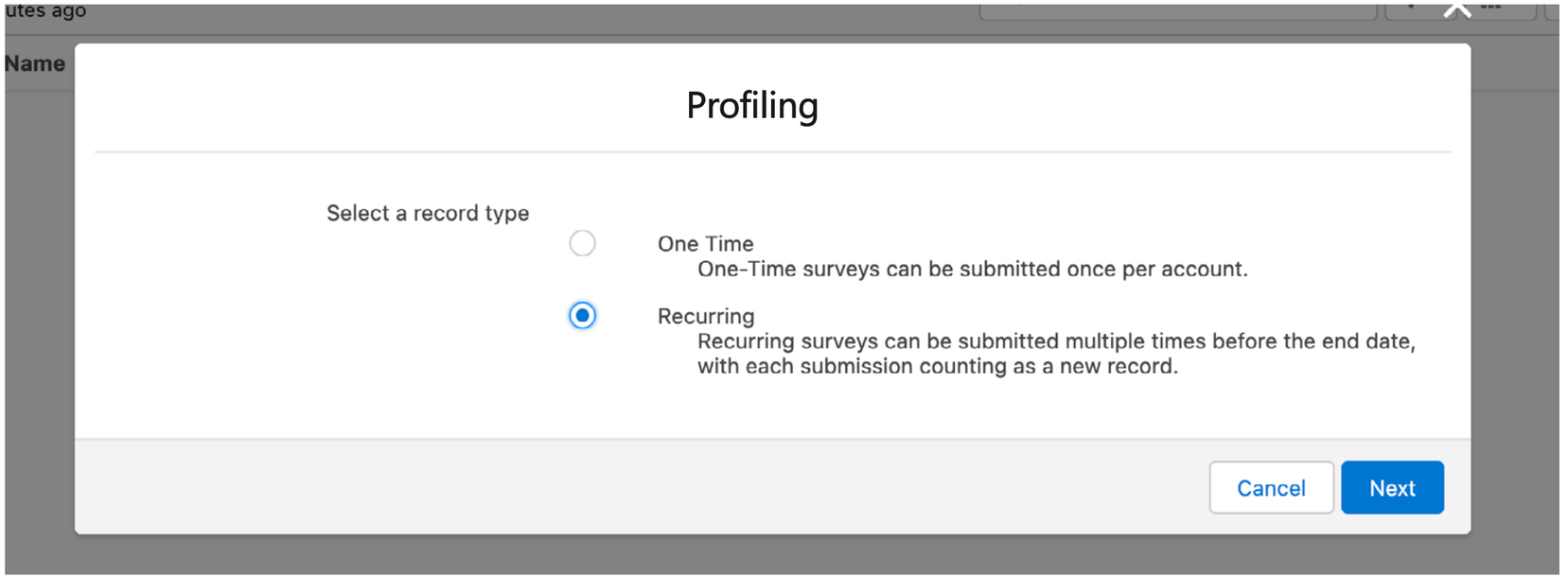


Step 4 Add your survey questions

Within the final screen you can add your survey questions to complete the process. This is also the screen you would reach if you are editing an existing profile and wishing to make changes to the questions.


Search: All
Search...
Marketing
Home
Campaigns
Leads
Contacts
Reports
Dashboards
Product Ca
Search apps and items...
Apps
Marketing
Service
Agency Sandbox
Approved Email
Profiling
Sales Console
Service Console
View All
requests need your attention right now.
day.
View Calendar
Today's Tasks
Nothing due today. Be a go-getter, and check back soon.
View All


Profiling
Home
Clear Veeva Cache
Profiling
Questions
Survey Targets
Reports
Engage Content Admin
Engage MetaData Admin
More
Profiling
Recently Viewed
New
Import
Change Owner
0 items • Updated a few seconds ago
Search this list...
Profiling Name


utes ago
Name
Profiling
Select a record type
One Time
One-Time surveys can be submitted once per account.
Recurring
Recurring surveys can be submitted multiple times before the end date, with each submission counting as a new record.
Cancel
Next

Profiling Edit

Save Cancel

Information = Required Information

Profiling Name	Training Survey	Status	Development
Record Type	Recurring	Channels	Available / Chosen: CLM, CRM
Start Date	30/06/2023	Owner	Content Loader
End Date	30/06/2025	External ID	SurveyID-1

Assignment Rules

Assignment Type	Product and Territory	Allow users to choose targets?	☐
Product	Cholecap	Included user territories:	101

Save Cancel

Profiling Detail

Edit | Delete | Clone | Translate | Publish

Information

Profiling Name	Training Survey	Status	Development
Record Type	Recurring	Channels	CLM, CRM
Start Date	30/06/2023	Owner	Content Loader
End Date	30/06/2025	External ID	SurveyID-1

Assignment Rules

Assignment Type	Product and Territory	Allow users to choose targets?	☐
Product	Cholecap	Included user territories:	101

System Information

Created By	Content Loader , 30/06/2023 12:08	Last Modified By	Content Loader , 30/06/2023 12:11

Profiling Questions (0/25)

Survey Questions (0/25)

New Survey Question | Question Bank

Appendix

Useful terms

To effectively organise and manage CLM content, it is helpful to understand some of the terms that are often used.

- **Account:** An account represents a specific HCP or healthcare institution. CLM content is often organised based on target accounts to ensure relevant content delivery.
- **Binder:** A binder is a collection of slides or content modules that are grouped together for a specific purpose - ie a presentation to deliver during a sales interaction.
- **HTML (Hypertext Markup Language):** CLM content can be created in HTML. HTML uses special tags to define the structure and content of your material and allows for interactivity and data capture.
- **.CSV (Comma Separated Values):** .csv is a file format where data is organised using commas. It is commonly used to store data in a structured way, often for tasks such as uploading information into databases or spreadsheets. For CLM presentations built using HTML, a .csv file is required for the Veeva upload process.
- **CLM (Closed Loop Marketing):** Closed Loop Marketing is an approach that uses data about individual customers to create personalised marketing strategies. It's all about tailoring your marketing efforts to the specific needs and preferences of each customer.
- **Veeva CRM (Customer Relationship Management):** Veeva CRM is a specialised Customer Relationship Management system tailored for the pharmaceutical industry. It helps Otsuka manage their interactions with healthcare professionals and institutions, ensuring compliance with industry regulations and improving relationships with potential stakeholders.
- **Veeva Vault:** Veeva Vault is a cloud-based platform, designed for pharmaceutical and life science companies to securely manage their important documents and data. It can be thought of as a highly secure digital filing cabinet.
- **Veeva PromoMats:** Veeva PromoMats allows for the creation, review and approval of promotional materials. It is also connected with Veeva CRM; allowing for the transition to distribution, once materials have received full approval.

Supported file types

Veeva Vault supports various file types for CLM content. The supported file types may vary depending on the version of Veeva you are using and any specific configurations set by your organisation. Commonly supported file types include:

- **PowerPoint (PPT / PPTX)**
- **HTML**
- **PDF** (flat PDFs only - embeded interactivity does not work in Veeva)
- **Video (MP4 / AVO / MOV)**
- **Images (JPEG / PNG / GIF)**

It is important to note that while Veeva Vault typically supports these file types, you should consult with your Veeva Vault Administrator if you run into any compatibility issues.

Common errors and solutions

The following table is a helpful resource for users who encounter errors while using Veeva Vault and Veeva CRM Multichannel Loader, including direct links to relevant support pages on the Veeva. Of course, if you are unable to solve your error please reach out to your agency or Veeva support to assist you further.

Error	Root Cause	Solution	Veeva Support Page Link
POST request failed to process	There is at least one TAB character hidden in a cell	Remove any extra spaces at the end of values in the .csv file	*Link*
Unable to set field values on related document	There are non-populated required fields on the source document	Populate all required fields on the source document	*Link*
Vault API call failed. Unknown field in 'field list'	The field mentioned is hidden from the user using Multichannel Loader	Remove security overrides hiding the field	*Link*
Unable to continue CLM content refresh process	There are no valid vault sessions during the integration	Validate the password of the Vault user account	*Link*
slide.claim__c.name__v is not a valid column header	The object field name__v is not unique within the object	Use a unique field (e.g., ID) instead of name__v	*Link*
Change document status: change state could not be completed	The 'Send to CLM' entry action is added to the approved state	Remove the 'Send to CLM' entry action from the workflow	*Link*
Error: slide.claim__c.name__v is not a valid column header	The object field name__v is not unique within the object	Use a unique field (e.g., ID) instead of name__v	*Link*
Error: .zip file [filename.Zip] improperly structured	The .zip package contains .png images which are not supported for legacy packaging	Update the packaging format to use the new standard and ensure folders are not included in the .zip file	*Link*