

Broker Briefcase[®]

USA

User's Guide

A comprehensive getting started and best practices guide.

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Text styles in Help—What do they mean?

To enhance your Zywave **Help** experience, we use the following styles to highlight important information you cannot miss. Whether you need to go to a specific tool page and click a button or you're in need of a helpful tip, the following styles will guide you through our **Help** resources with ease.

Style	Description
Bold text (In a font that differs from the surrounding text)	You should type this text exactly as shown. Example: Type <code>https://www.zywave.com</code> in the address box of your Internet browser.
<i>Italicized text (In a font that differs from the surrounding text)</i>	You should replace this text with your own values. Example: Type today's date in the following format: <i>mm/dd/yyyy</i> .
Bold text (In the same font as the surrounding text)	You'll see this text on-screen. It may appear as a link or button to click. Example: Click Save to apply your changes.
<i>Italicized bold gray text</i>	You'll see this text on-screen. It may appear as a window or menu name. Example: You can search for a resource using the Content menu.
Tip:	A tip or hint for using a particular feature of your application.

Style	Description
<p>Note:</p>	<p>A note that you should be aware of when using a particular feature of your application.</p>
<p>Important:</p>	<p>An important note that you should be aware of when using a particular feature.</p>
<p>How? How?</p>	<p>A set of instructions on how to use a feature.</p>
<p>Example: Here is some text giving an example.</p>	<p>An example of how to use a feature.</p>

Workflow of Broker Briefcase®

>>First steps

Karen's agency has just purchased Broker Briefcase® and has selected to give Karen the [administrator role](#) at their agency. Karen is ready to get started and [logs in](#) to Broker Briefcase®. Upon arriving at the [home page](#), Karen sees banner ads, new content, and the navigation menu.

>>Set up administrative features

Karen wants to customize a few [distribution templates](#) for her agency. Afterward, Karen [imports custom content](#) for the producers at her agency to distribute to clients. Next, Karen adds [custom posting categories](#) for the MyWave portal her agency owns.

>>Search for content

Now that Karen has taken care of some key administrative features, she wants to [distribute](#) a few resources to her clients—but first she needs to [find the content](#). She enters a search term in the search box, then scans the [Search Results](#) page for a resource. To narrow her search results further, she refines her search using [refinement categories](#) and their [keyword tags](#).

>>Distribute content

Karen clicks her desired resource and its [Content Details](#) page loads. She determines this resource could be valuable in the future and marks it as a [Favorite](#), then clicks **Action Items** to add the resource to a content group so she can revisit it later. Afterward, Karen decides she wants to [distribute](#) this resource to her clients immediately.

What if she does not have any accounts or contacts listed? Karen will need to import her accounts and contacts into Account Management Center.

>>Review scheduled distributions

After distributing the resource, Karen clicks [Calendar](#) from the main navigation menu to review [scheduled distributions](#).

>>Run a report

Karen realized the plethora of resources Broker Briefcase® has to offer and would like to see the other content types available to her. She clicks **Reports** from the main navigation menu and runs the **Content** report to get a detailed list of content that's available.

Getting started

Broker Briefcase® is your powerhouse content and distribution engine, helping you stay in front of your clients and prospects.

What is Broker Briefcase®?

Keep your agency indispensable to your clients so you can continue maintaining and winning business with Broker Briefcase®—your online marketing and communication tool that revolutionizes the way you sell and service.

The content in Broker Briefcase® is vast and written by industry experts devoted to providing you with original, timely marketing and communication resources. Log in to one location for all the benefits, property and casualty, and personal lines information you need.

Broker Briefcase® is a proven product, built by brokers for brokers, specifically for the way brokers work. It will allow your agency to:

- Differentiate itself from your competitors.
- Attract new business.
- Continually demonstrate value to existing clients.
- Improve the productivity of its staff and clients.
- Reduce turnover of existing accounts.

Most importantly, Broker Briefcase® is simple. We do the research. We do the writing. We make it appealing and professional—all you do is point and click.

Types of content

From Microsoft® Word® documents to videos and more, Broker Briefcase® contains a plethora of valuable content broken down into categories, formatted to help you find content as quickly as possible. Because Broker Briefcase® content is built using Microsoft® Office® (Word®, Excel®,

and PowerPoint®), it is easily accessible and editable. The build process also customizes content with your agency information and logo, branding the resource to your agency.

How? To view the different types of Broker Briefcase® content available to you, look to the navigation sidebar, then click **Browse**.

How Broker Briefcase® customizes content to fit your needs

Content in Broker Briefcase® is designed to fit your branding and speak to your clients and prospects. Your agency and client information is automatically pulled into Broker Briefcase® content with merge fields.

Example: In the following illustration of a Broker Briefcase® prospecting resource, take note of the highlighted areas. Each of these areas are merge fields, which include your agency name, logo, tag line, contacts, contact information, and other related information.

When you choose an insurance broker, are you choosy enough?

When you partner with **Awesome Agency**, you're putting your trust in an industry leader. We offer a wealth of property and casualty insurance solutions including loss control and cost containment programs, risk management solutions and safety-related communications. These value-added services enhance our commitment to you through strategic planning, expertise and technology.

Together, we can create a program that helps you meet your risk management initiatives, so you don't just survive but thrive in the changing marketplace. Our services are unique. Discover why hundreds of companies make **Awesome Agency** their broker of choice.

Awesome Agency

We want to be your broker of choice.

Awesome Agency ◇ <http://www.zywave.com>

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Broker Briefcase® mobile

Stay cutting-edge and top-of-mind with clients and prospects using Broker Briefcase® mobile. Present and distribute content directly from your mobile device wherever you are—whether it's in a client meeting, in the airport, or in a prospect presentation.

How? From your mobile phone or tablet, go to www.brokerbriefcase.com. You'll be automatically redirected to the mobile site where you can log in with your Zywave credentials. For easy access, tap the pop-up to create a shortcut on the home screen of your device.

For more information on how to use Broker Briefcase® with your mobile device, look to *Broker Briefcase® mobile Best Practices* in *Broker Briefcase® Help > Additional resources*.

Logging in

Retrieve your login credentials

Forgot your user name or password? Logging in for the first time? Locked out of your account? To request a new password for one for one of these reasons:

1. From the Broker Briefcase® login page, click **Forgot your password?**
2. Enter your email address, then click **Continue**.
3. From the Instructions for *Resetting your Zywave Password* email, click **Reset Password**.
4. Click **Reset password** for the desired user name you'd like to reset the password for.

Note: This step is only applicable for those with both a broker and client login.

5. On the *Reset Your Password* page, enter your new password, then click **Submit**.

After resetting your password, you'll be logged in to Account Management Center and will receive an email confirming the password change. From Account Management Center, click the *Products* drop-down > **Broker Briefcase®**.

Logging in through Zywave™ Home

1. Go to Zywave™ Home at <http://home.zywave.com>.
2. If necessary, enter your *Username* and *Password*.
3. From the home page, click the Broker Briefcase® thumbnail; or, from the *Solutions* page, click **Launch** next to Broker Briefcase®.

Logging in through Zywave® Sidebar

1. Go to Zywave® Sidebar through the *Start* menu > *Programs* > *Zywave* > *Zywave Sidebar*.
2. If necessary, enter your *Username* and *Password*.

3. Open the *Product Launchpad*, and click **Broker Briefcase®**.

Logging in through Account Management Center

1. Go to <https://amc.zywave.com>.
2. From the top bar, click *Products* > **Broker Briefcase®**.

Customizing your Broker Briefcase® settings

Tailor Broker Briefcase® to only show content your clients need and set default distribution settings. To access your user settings, look to the top bar, then click your name. On the *Settings* page you can:

Line of business
Tailor search results to only show content you need by **Benefits**, **P&C**, or **Personal Lines**.

Content Notifications
change the frequency and topics of the content notification emails you receive.

Live Chat
Add or remove your access to live chat.

Distribution format settings
Default your distribution content format to PDFs to deliver a static version of content (one that cannot be edited) each time you distribute; or,

Broker Briefcase Settings

ACTION ITEMS (0)

Line of business [Edit](#)

This setting controls which types of content are visible in your Broker Briefcase.

Selected lines of business:

- Benefits
- P&C
- Personal Lines

Content Notifications [Unsubscribe](#) [Edit](#)

Tell us how often you'd like to receive notification emails about our trending content. You can further customize your notifications by selecting the content categories most important to you.

Benefits
P&C

Frequency:

- Receiving Weekly emails.
- Receiving Content Bulletins.

Selected Categories:

- Benefits Administration
- Employee Communications
- For the Broker
- HR
- Regulatory Compliance
- Wellness

Live Chat [Edit](#)

Receive answers to your toughest questions by chatting with our Zywave Partner Support team via Live Chat.

Make Live Chat visible at the bottom of my screen?

Yes

Distribution format [Edit](#)

Ensure your clients receive content that maintains its formatting and is easy to read on any device by defaulting your distributions to PDF. Video content and Microsoft Excel documents will not be affected by this setting.

Viewing and servicing your accounts

Search for an account and view its pending distributions and distribution history. Take it a step further and send them information they may find interesting from the account's recommended content—based on past distributions.

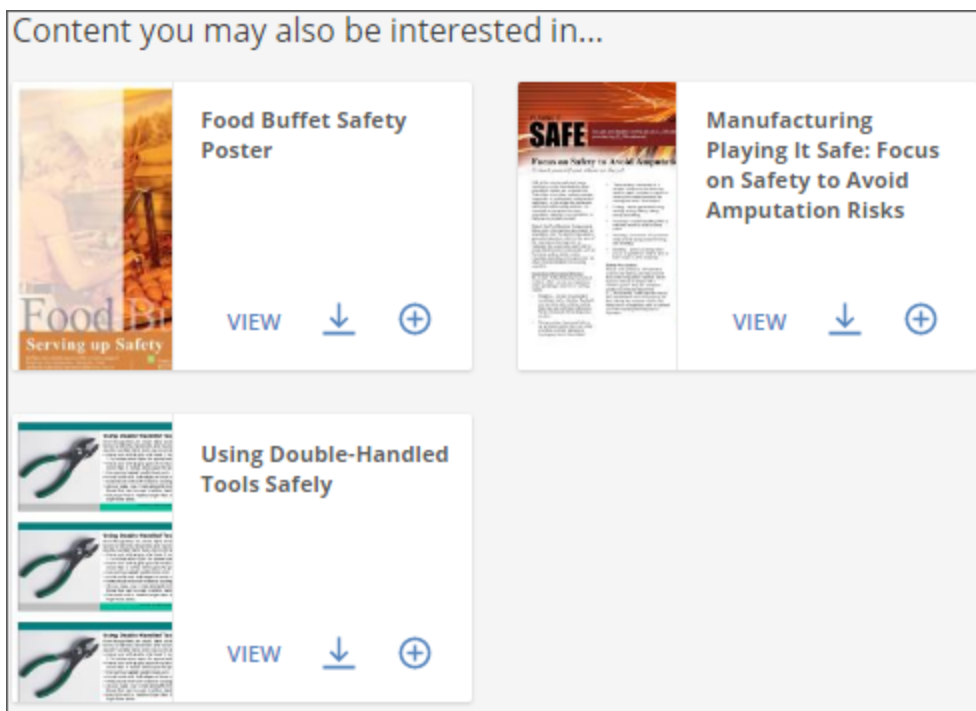
Manage accounts

Update account and contact information for clients and prospects.

How? From the Broker Briefcase® navigation menu, look to *Communications* and select **Manage Accounts**.

Finding content an account may like

Show your clients just how amazing you are by sending them relevant content they may also be interested in. Explore a resource's content details page ***Content you may also be interested in*** section to find additional content related to the resource.

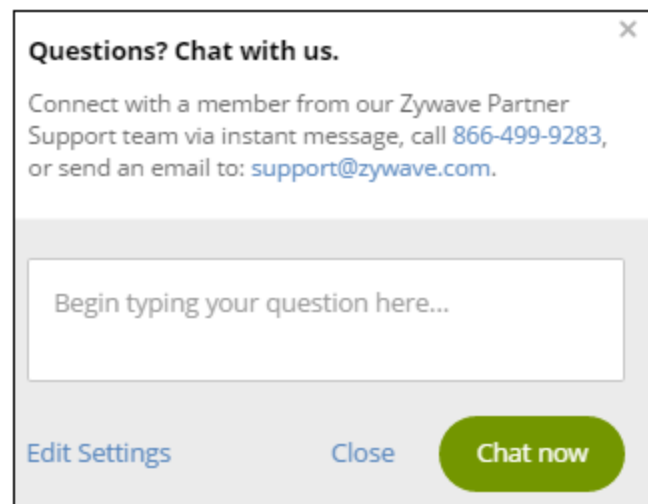


Getting answers to your Broker Briefcase® questions

Looking for quick answers to your most complicated questions? Easily connect with an expert from our Zywave Partner Support team via instant message; or, receive higher level training through Zywave University—whether you've just bought Broker Briefcase® and are in the implementation stage, or you've had the application for a while and need a refresher, there's a plethora of training resources made just for you!.

Chat live with Zywave experts

How? From the bottom-right corner of the application and click **Live Chat**.





Note: *Live Chat* is accessible when *online* is green; it's unavailable if grayed out. If the *Live Chat* support window doesn't open when it's green, you may need to check your browser's Internet options or pop-up blocker.

Zywave University

Take advantage of these free training resources by clicking **Need help?** in the upper-right of your top bar.

- On-demand videos
- Product webinars
- Take Action webinars

- Compliance webinars
- The Form webinars

<p>Send Us an Email</p> <p>It looks like all of our Zywave Partner Support team members are offline. Check back later, or send an email to: support@zywave.com.</p>	<p>Need Help?</p> <div style="margin-bottom: 20px;">  <p>Broker Briefcase® Help Explore our step-by-step workflows, quick reference guides, best practices, and more.</p> <p>Search for answers</p> </div> <div>  <p>Zywave University Learn more by taking a look at our webinars, videos, hands-on courses, and reference materials.</p> <p>Learn more</p> </div>
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[Close](#)

Other Help resources

If you want to learn the ins and outs of Broker Briefcase®, then don't miss out on **Help** resources that house detailed step-by-step instructions and highlight important information. Take a look at quick reference guides, best practices, and more under **Additional resources**, and never miss out on new and updated features by going to **What's new** and clicking on a release date!

Getting to know the home page

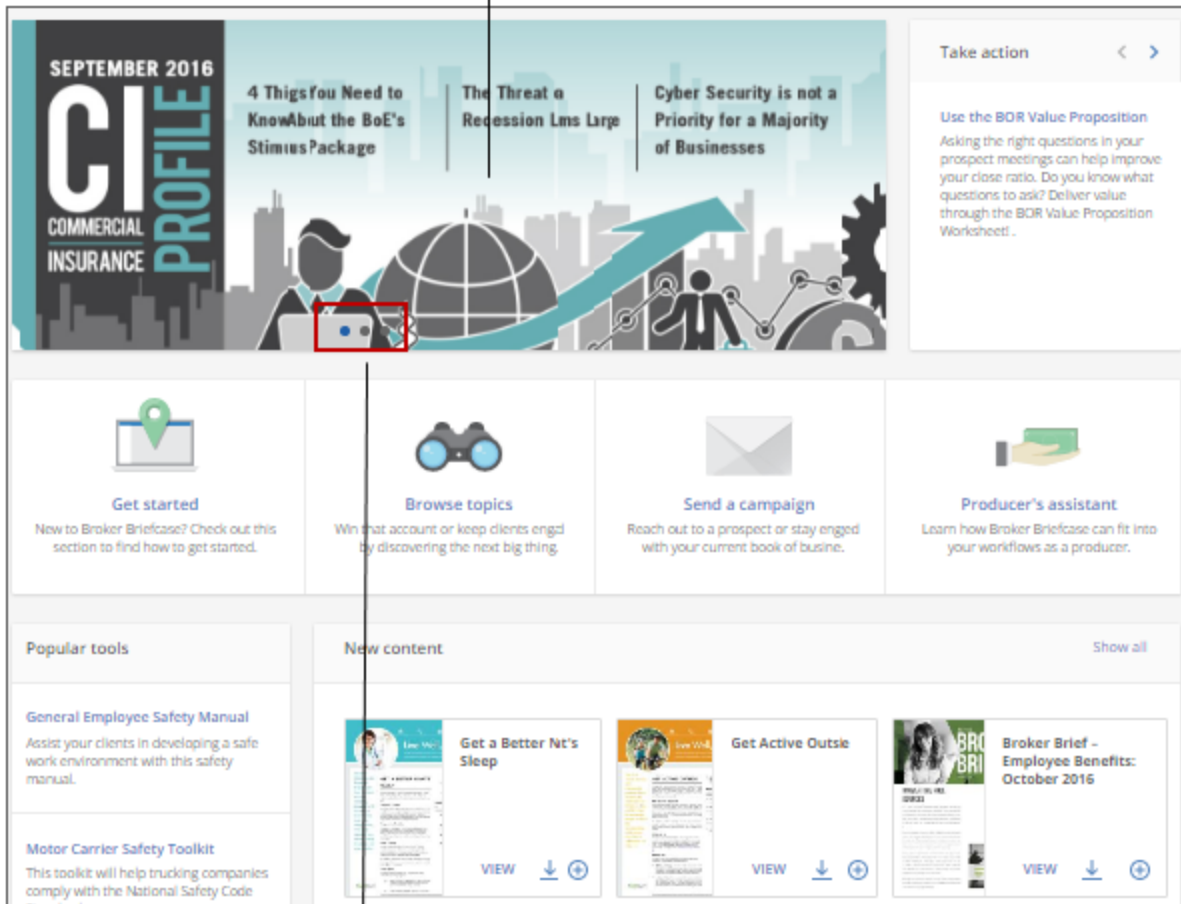
Look to the home page for new content and campaigns, timely resources, and popular topics to keep your clients informed of the latest and most valuable information.

Discovering valuable content through banner ads

You may be wondering what the flashing images across the top of your Broker Briefcase® portal are for. Look to these banner ads for the latest information regarding benefits, property and casualty, legislative updates, hot topics, and personal lines information.

Note: The banner ads displayed are dependent on the content bundles owned by your agency. For more information, contact your Zywave Account Executive.

Click on a banner ad to view its information.



Use the dots at the bottom of the banner ad to select an ad you want to view.

Checking out the newest content

Take a look at the latest Broker Briefcase® content directly from the home page. In just one click, see new content in a familiar search results layout.

Download
Download a new piece of content directly from the homepage.

Action Items
Add content to your Action Items.

All new content
Check out all the new Broker Briefcase content.

New content Show all

Get a Better Night's Sleep
VIEW ↓ ⊕

Get Active Outside
VIEW ↓ ⊕

Broker Brief - Employee Benefits: October 2016
VIEW ↓ ⊕

Broker Brief - P&C: October 2016
VIEW ↓ ⊕

Posting content to a client portal
VIEW ⊕

Driver Safety
VIEW ↓ ⊕

View
Click View to email, post, or take a closer look at a resource.

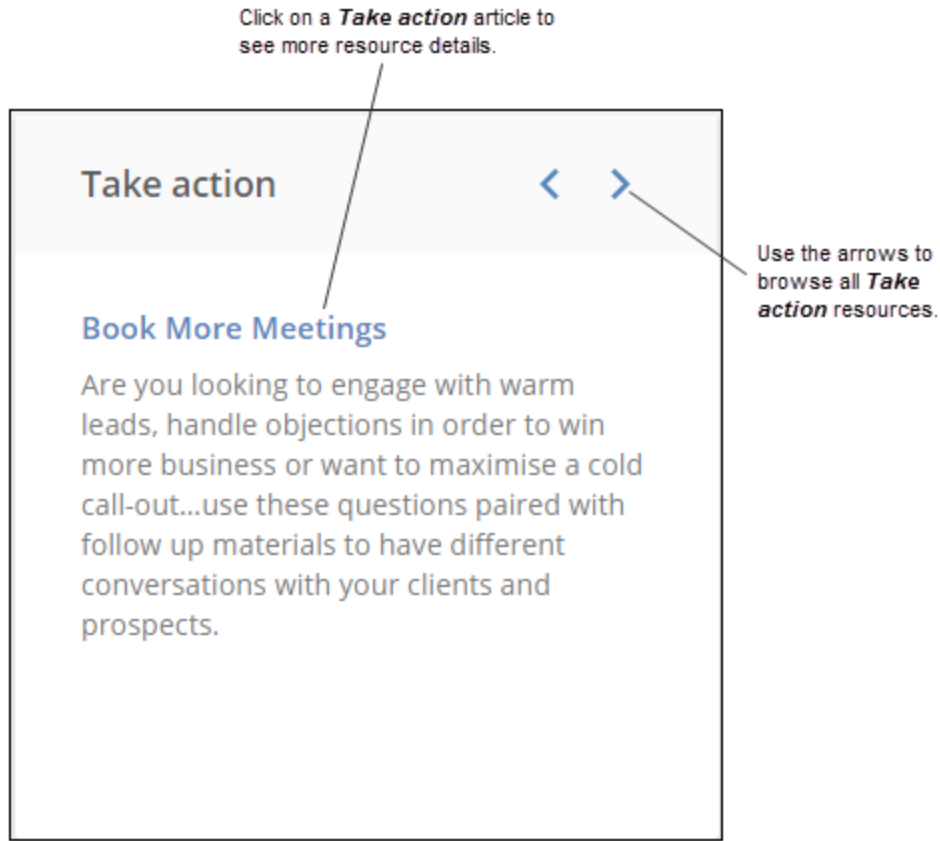
Find quick solutions with Take Action

Use the Broker Briefcase® **Take action** tool to gain insight on strategy tips, recommended content that will show you the ins and outs of Broker Briefcase®, and learn how to maximize Broker Briefcase® usage. The **Take Action** section will be continuously changing to highlight all the different tips and tricks that'll help you use Broker Briefcase® to your full advantage.

Click on a **Take action** article to see more resource details.

The screenshot shows a card with a light gray header. The header contains the text 'Take action' on the left and two navigation arrows (a left-pointing arrow and a right-pointing arrow) on the right. Below the header, the card has a blue title 'Call out the incumbant broker' and a paragraph of text: 'Let your prospects know that their current broker isn't measuring up. Bring this checklist to your first meeting and draw attention to all that you provide to your clients while leaving their current broker in the dust.' Two callout lines originate from the text above the card: one points to the 'Take action' header, and the other points to the right-pointing navigation arrow.

Use the arrows to browse all **Take action** resources.



Access helpful resources through Popular Tools

Learn about some of the popular tools that are available to you in Broker Briefcase® in the **Popular Tools** section on the homepage. This is updated by our Market Analysts on a regular basis to keep you up-to-date with the most trendy features being used.

Popular tools

General Employee Safety Manual

Assist your clients in developing a safe work environment with this safety manual.

CASL Compliance Toolkit

Help keep your clients CASL compliant with this toolkit.

Business Flooding Toolkit

Ensure your clients can withstand a flood by providing them this toolkit.

Business Continuity Toolkit

Clients can use this toolkit to prepare their business for when disaster strikes.

General Employee Safety Manual

Assist your clients in developing a safe work environment with this safety manual.

Motor Carrier Safety Toolkit

This toolkit will help trucking companies comply with the National Safety Code Standards.

More homepage tools

Get started

Explore the benefits of Broker Briefcase® and learn how to get started with your client communications by taking a tour, watching videos, or downloading helpful resources.

- **Take a tour** - Learn how to efficiently complete tasks in Broker Briefcase using guided, in-product tours. Begin by clicking on a tour name, and follow the on-screen instructions.
- **Watch a Zywave University video** - Watch videos design to quickly walk you through Broker Briefcase functionality, workflows, and best practices.
- **Help** - Looking for some more information? Get started by navigating to Help to browse through best practices, quick reference guides, and more.
- **Sign up for a webinar** - Look for the latest webinar offerings, designed to help you get the most out of Broker Briefcase. Register for a webinar directly from the Get started page.
- **View get started content** - Check out some of the top resource to start your Broker Briefcase exploration, such as Broker Insights, Roadmaps, Campaign Catalogs, and more.
- **Read this month's newsletter** - Each month, the Broker Brief will highlight new content and timely, up-to-date resources in Broker Briefcase, which you can use to position yourself as an expert and trusted advisor.

Browse topics

Access to the Browse Categories page to start discovering all the content Broker Briefcase has to offer. Use predefined content categories to help quickly narrow down your search to content you and your clients find valuable.

Send a campaign

Navigate to all Zywave Content Groups to look through a collection of campaigns created by Zywave with pre-selected distribution dates, and begin setting up a distribution for your clients and prospects.

Producer's assistant

Instantly prepare brokers for success. The Producer's Assistant includes resources for any stage of the sales process and renewals. These quick solutions will help brokers target specific client needs for more effective sales.

Searching the content library

The first step to delivering quality content is to find it. The search process in Broker Briefcase® is designed to help you do just that by yielding an assortment of relevant search results.

Browsing and searching for valuable content

Not sure what you're looking for? In Broker Briefcase® you can **Browse** hundreds of categories and their search refinements to discover valuable content. Looking for an exact resource or have a specific search term in mind? Harness the powerful search engine of Broker Briefcase® to yield the most comprehensive and accurate results.

Tip: To narrow results, look to the **Filter by** section, then select additional keyword tags. Sort your search results by best match, or by most recent.

Browsing for new content

When **Browsing** for content, select a keyword tag from the list of categories and your search results will only show content related to that specific keyword tag.

1. From the navigation sidebar, look to **Content**, then click **Browse**.
2. Look to a category, then click a keyword tag from that category's search refinement list.

Tip: Select **Browse All Categories** to see a full list of all content categories.

Select **Browse All Categories** to see a full list of content categories.

Browse Categories

Explore the most popular areas and topics in Broker Briefcase. Head [Browse All Categories](#) to see every topic available to you.

ACTION ITEMS (24)

Benefits

Agency Resources and Tools 4 categories



From resources and tools designed to help you prospect and win new business, to guides and reference materials for onboarding new producers, this section contains everything your agency needs to succeed with Broker Briefcase.

- [Broker Tools](#)
- [Agency Strategy](#)
- [Agency Marketing Materials](#)
- [Getting Started](#)

Benefits Administration 4 categories

Property & Casualty

Agency Resources and Tools 4 categories

Personal Lines

Agency Resources and Tools 4 categories

Click on a category to see its search refinement list.

Example:


1. From the navigation sidebar, look to **Content**, then click **Browse**.
2. From the **Browse Categories** page, select **Browse All Categories**, then click **Audience**.
3. From the **Audience** section, select **Broker**.

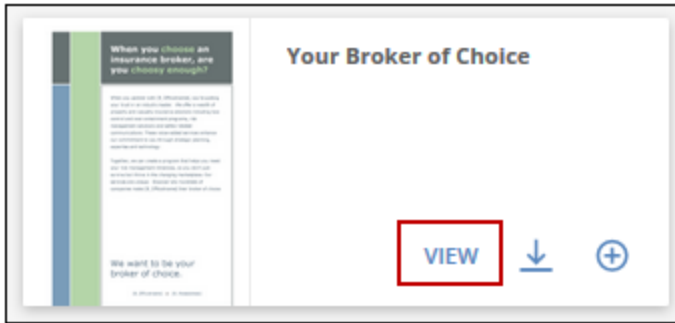
The search results page will only show content that's been tagged with the keyword **Broker**.



Searching for an exact resource

When **Searching** for content, enter a search term and the **Search Results** page will only show Broker Briefcase® content containing that specific term.

1. From the search box, choose **Content, Content Groups, or Accounts**.
2. Enter a search term or phrase in the search box.
3. Press **Enter**, or click **Find** (magnifying glass).
4. To narrow results further, from the **Filter by** section, expand each search refinement's  icon, then select keyword tags.
5. Locate a resource, then click **View** to access the content details page.

**Example:**

You want to provide your client with a risk summary and coverage checklist for their carpenters.

1. In the Broker Briefcase® search bar, select **Content**, then enter *risk summary and coverage checklist carpenters*.
2. Press **Enter**, or click **Find** (magnifying glass).
3. From the search results page, locate the document *Risk Summary & Coverage Checklist: Carpenters*.

Finding a content group

You can use content groups for creating reusable campaigns, drip marketing, and more!

To find out more about using content groups to your full advantage, see "Best practices with using content groups" on page 91.

Searching for a content group

If you know exactly what you're looking for, **Search** for a content group in Broker Briefcase®.

1. From the Broker Briefcase® search bar, click **Content Groups**.
2. Enter the name of grouping or campaign you're looking for.
3. Press **Enter** or click **Find** (magnifying glass).

Browsing for a content group

If you're not quite sure what you need, **Browse** already made Zywave content groups or custom content groups made by users at your agency.

- Custom content group: From the navigation sidebar, look to **Content Groups**, then click **My Content Groups**.
- Zywave content group: From the navigation sidebar, look to **Content Groups**, then click **Zywave Content Groups**.

Click a group, or campaign, **View** option to access the details page—where you can view specifics about this grouping or campaign.

Tip: Sort content alphabetically or by most recent.

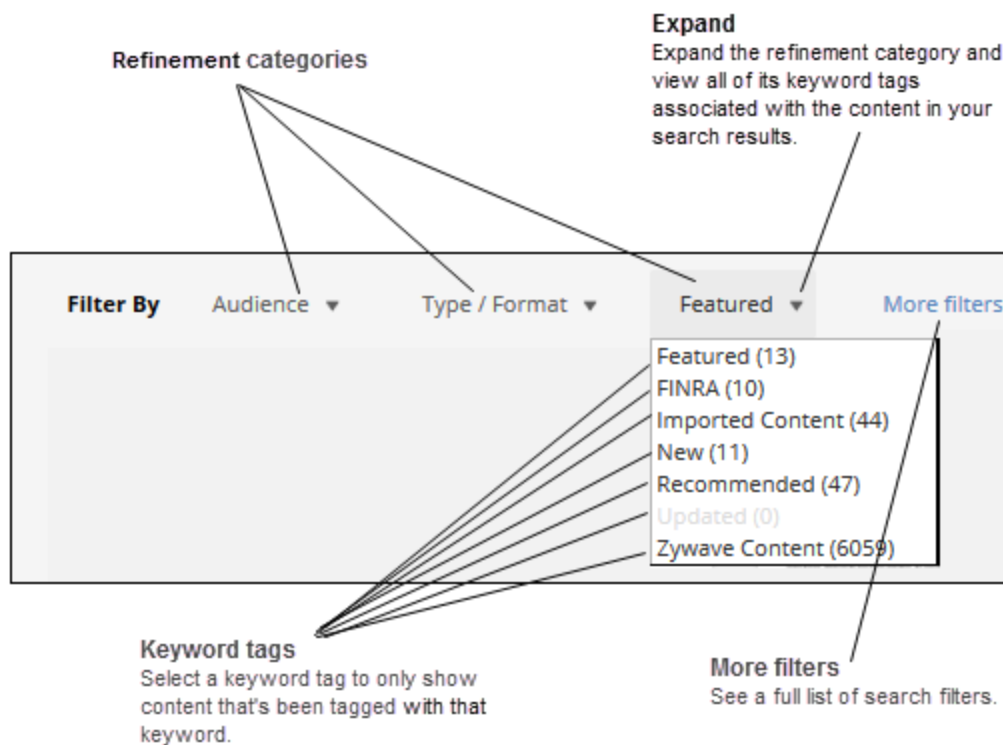
Narrowing and sorting search results

Save time and locate a resource as quickly as possible by adjusting or narrowing your search results.

Narrowing your search results

To find content you need quickly, narrow your search results to only show content associated with a specific topic by selecting keyword tags from the **Filter by** section.

Note: Keyword tags are keywords that content has been tagged with by Zywave experts to help you find content with ease.



Example:

Your client needs a flyer for their employees to explain the benefits of using a health savings account.

1. From the search bar, click **Content**.
2. Enter **Wellness** as your search term, then press **Enter** or click **Find** (magnifying glass).
3. From the **Filter by** section, click **Audience > Employee/Individual**.
4. From the **Filter by** section, click **Type/Format > Poster**.

Example:

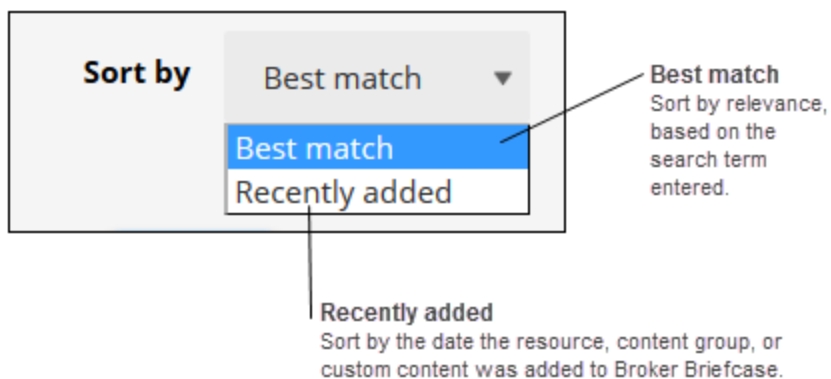
One of your clients often works with transporting hazardous materials and they want to provide their employees with content on workplace safety.

1. From the search bar, click **Content**.
2. Enter **Hazardous Materials** as your search term, then press **Enter** or click **Find** (magnifying glass).
3. From the **Filter by** section, click **Audience > Employee/Individual**.
4. From the **Filter by** section, click **More filters** and select **Industry > Transportation and Warehousing**.
5. From the **Filter by** section, click **More filters** and select **Safety > Hazardous Materials**.

Sorting search results

Organize your search results so they are easier to view by selecting a sort order. From the search results page, click the drop-down arrow next to **Sort by**.

Note: Your search results will automatically be sorted by *Best match*.



Running a Search Results report

Analyze search results and find the most valuable resource for your client by running a detailed report. The **Search Results** report includes the terms you searched, a list of content that was found for each term, and a description for each resource.

1. From the top-right of the search results page, click **Run report**.
2. Select an output **Format**.
3. Select **show all** results, or click **Show first** to select a specific number.
4. To edit the report columns:
 - To add a new column, click **+ Add column**.
 - To delete an existing column, click the **(x)** icon on the column you wish to delete.
5. Select whether the report is for an **External** audience.

Note: If you select **External**, all your internal agency resources will be removed from the report.

6. Click **Export data**.

Viewing content details

Finding quality content was the first step—now take it a step further. Easily find your most commonly used content by marketing it as a ***Favorite***, create and send drip marketing campaigns by storing and grouping content in your ***Action Items***, and much more!

Getting details on the content you find

From reading the content description and viewing its merge fields to reviewing its history and pending distributions, learn everything you need to know about a resource or content group—and distribute it—right from the content details page!

How? From the search results page, point to the resource or content group thumbnail, then click **View**.

Note: *Posting* is only available to users with client portals.

For more information, contact your Zywave Account Executive.

Viewing details on a single resource

Favorites
Add this resource to your *Favorites*.

Action Items
Add this resource to your *Action Items*.

Post
Post this resource to a client portal.

Download
Download and open this resource.

Email
Distribute this resource directly to a client via email.

How Do We Measure Up? Broker Comparison Marketing Checklist - P&C

Reviewed June 1, 2010 by Zywave, Inc.

ID: 2748

★ Favorite

How Do We Measure Up?

[B. officinares]
Providing Innovative Services for Innovative Companies

Service	Description	Check box if you want this service
Insurance Market Access	We provide access to virtually all insurance and administrative markets.	<input type="checkbox"/>
National Affiliations	In addition to our own talented professionals and specialized value-added services, we have a wealth of resources available to us through several national affiliations.	<input type="checkbox"/>
Strategic Planning	We will develop a customized strategic plan for your firm, define objectives and outline the actions needed to fulfill those objectives. Our services ensure an organized, complete approach to fulfilling your firm's management needs.	<input type="checkbox"/>
Five-Star Service	We pride ourselves on the level of knowledge and service we bring to our clients. All of our clients are assigned a team of specialists dedicated to serving their needs. Each client receives our best through the employment of careful, ongoing working relations, seamless and easy.	<input type="checkbox"/>
Experience	We have a proven track record of dedication and commitment to excellence in our service to the business community.	<input type="checkbox"/>
Technology	We use leading edge technology to provide our customers with the latest data analysis and compliance tools.	<input type="checkbox"/>
Data Analysis	Using Property and Casualty claim data provided by your carrier, our Internet-based Risk Analysis and Liability Center (RALIC) shows you what's driving your losses. This gives us an opportunity to focus our activities to meet that risk, reduce your costs.	<input type="checkbox"/>
Client Portal	All of our clients receive access to a personalized website. The site is devoted to helping you with cost containment and risk programs, claim compliance, claim reporting, employee communication and more.	<input type="checkbox"/>
GDHA Compliance	All of our P&C clients have access to an online tool used to create accurate GDHA logs and reports on demand. We also provide timely and relevant legislative updates when changes are made at the federal level.	<input type="checkbox"/>
Online Services	[B. Officinas] provides 24/7 reporting services, reporting claims, adding or deleting drivers and vehicles, or requesting a certificate of insurance is as easy as sending an email.	<input type="checkbox"/>
Custom Communication	With an extensive library of cost containment and loss control tools, we provide a broad range of communications, including ready-to-use employee newsletters, posters and payroll buffers.	<input type="checkbox"/>
Resources	From subjects to working safety to workers' compensation statistics, our client portal Resource Info offers you quick access to a wide variety of industry-related references.	<input type="checkbox"/>
Client Portal Community	When participating with us, you gain access to professionals from all over the country through the Community section of your client portal. An answer to a problem you raise is just an email away. As an example, one client writes, "Has anyone participated in [Company's] Safety/Prevention Program?" Carry on! Let us know about your experience!" This question was answered quickly, with time and resources.	<input type="checkbox"/>

ACTION ITEMS (24)

Email

Download

Post

Add to Action Items

Add to Group

Description

One-page checklist comparing your agency's value-added services to a prospect's existing broker's services.

Distribution schedule

Pending	History
Details	Send date/Post range
Send to 1695 Old Henderson Rd.	07/02/2012

Open distribution calendar

Content you may also be interested in...

Fireworks

VIEW

Milk Dealers

VIEW

Content you may also be

Add to group

Note: Default merge field information cannot be edited from this window.
 For more information, contact Partner Support at 866.499.9283.

Viewing details on a content group

Important:

You can edit and delete a content group only if you're the owner or a user with administrative rights. Default content groups created by Zywave cannot be edited or deleted.

The screenshot shows the 'Auto Solutions Suite' content group interface. It features a header with the title 'Auto Solutions Suite', a sub-header 'This content group contains 11 resources. Last updated July 15, 2011 by Zywave, Inc.', and a vertical 'ACTION ITEMS (24)' button on the right. The main area displays four resource cards: 'Auto Accident Form', 'Auto Financial Responsibility Laws', 'Automobile Insurance', and 'Cell Phone Use While Driving - Laws by State'. Each card has a 'VIEW' button, a download icon, and a plus icon. A right-hand sidebar contains 'Email', 'Post', 'Add all to Action Items', and 'Copy' buttons. A 'Description' section at the bottom right contains the text: 'From marketing to coverages to client education, you'll find a collection of auto basics in this grouping.' Callouts with arrows point from external text boxes to these interface elements.

Email
 Schedule this content group to be distributed via email.

Post
 Schedule this content group to be posted to a client portal.

Copy
 Save a copy of this content group to use as a base for a new content group.

Action Items
 Place this content group in your *Action Items*.

Viewing each resource in a content group

Ensure the content group is a perfect fit for your client or prospect by reviewing each resource within a content group.

How? Click the **View** option on a resource to see more details.

Reviewing the content's pending distributions

Review a resource's **Pending distribution** dates, recipients, and an option to view more details from the content details page.

Note: If the **Select all accounts** recipient option was selected during the scheduling of this distribution, this option will be listed as the recipient. After the distribution is sent, the distribution **History** will be updated to show each individual account that received this resource.

View all **Pending** distributions of this content, as well as its distribution **History**.

Distribution schedule

Pending
History

Details	Send date/Post range
Send to casey.creer@zywave.com	10/11/2016

[Open distribution calendar](#)

View this **Pending** distribution in your distribution **Calendar**.

Previewing and editing content output

Edit content merge fields, **Post** content to a client portal, **Email** content to a prospect or client, or store content in your **Action Items** from the content details window.

How? From the search results page, click **View**.

Previewing content with merge fields

View a resource's merge fields from the content details window by clicking **Download**—as shown in the following illustration.

Format
To download a static version of this resource, select PDF. To download a version you can edit, select Word.

Merge fields
Complete or edit any merge fields within this resource.

Download without merge fields
Download a version of this resource that doesn't show merge fields.

Download
Click **Download** to view this resource with your merge field and output format updates.

Download content

Format:

Merge fields: Incomplete

Download without merge fields:

Broker official name: [b_officialname]

Client name: [c_officialname]

Broker contact first name: [bc_fname]

Broker contact last name: [bc_lname]

Client address: [c_address]

Client city: [c_city]

Client state: [c_state]

Current date: [current_date]

[Close](#)

Adding content to your Favorites

Easily find your most commonly used content by marketing it as **Favorite**.

How? From the content details page, look to the top-left of the content image, then click the star to add to **My Favorites**.

Viewing your Favorites

Easily find your most commonly used content by marketing it as **Favorite**. The resource will be marked with a star—as shown in the following image—that can be seen anywhere in Broker Briefcase®. To view all of your **Favorites** at one time, look to the navigation bar under **Content**, then click **My Favorites**.

General Industry Safety Matters: Safety Meeting Basics

Reviewed May 1, 2008 by Zywave, Inc. ID: 9032

Favorite English >

Email

Download

ACTION ITEMS (24)

Safety Matters
Taking Precautions (2008-05-01)

Safety Meeting Basics

According to the Occupational Safety and Health Administration (OSHA), one of the most effective ways to promote a safe working environment is to get involved in regular safety meetings. These safety meetings provide an opportunity for you to help create a safe and healthy work environment. The most important safety meeting is the safety meeting.

Why Safety Meetings?
Safety meetings are an important part of your safety program. They provide an opportunity for you to discuss safety issues, share information, and receive feedback. Safety meetings are also a great way to promote a safe and healthy work environment. Regular safety meetings can help you identify and correct safety hazards before they become a problem.

Meeting Basics

- Attend safety meetings in a timely manner. Be on time and prepared.
- Participate in safety meetings. Share your ideas and concerns.
- Listen to the speaker. Pay attention to the information being presented.
- Ask questions if you do not understand something.
- Take notes. This will help you remember the information presented.
- Report safety hazards to your supervisor.

Regardless of your job title, safety is everyone's responsibility. See you at the next safety meeting!

Post

Add to Action Items

Add to Group

Description

Provides an overview for supervisors on safety meeting basics.

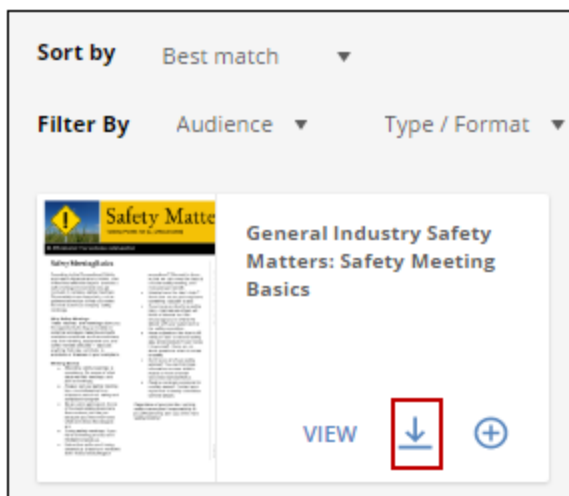
Downloading content

View a resource exactly how your clients and prospects will see it by downloading content from Broker Briefcase®. Content can be downloaded from a variety of places.

Note: Any merge fields in the content will be populated with information from the Broker Briefcase® database. If the information is not available, the merge field will appear as is, such as [b_officialname]. For more information on why a merge field is unavailable, call Partner Support at 866.499.9283.

Downloading from the search results page

From the Broker Briefcase® home page or search results page, look to the content thumbnail, then click **Download** (arrow icon).



Downloading from the content details page

From your search results, click on the content thumbnail to access the content details page, then click **Download**.


Downloading a Spanish version of content

You may want to download and distribute a Spanish version of content to a client for their employees.

1. Locate a resource that's available in **Spanish**.
2. From the resource thumbnail, click **View**.
3. From the content details page, look to the top of the page, then click **Spanish** from the drop-down.
4. Click **Download**.


General Industry Safety Matters: Safety Meeting Basics

Reviewed May 1, 2008 by Zywave, Inc. ID: 9032


Favorite

English
English
Spanish

<
>



Safety Matters
Talking Points for [JG_OfficialName]

[JG_OfficialName], Your workplace safety partner

Safety Meeting Basics

According to the Occupational Safety and Health Administration (OSHA), one of the most effective ways to promote a safe working environment is to get involved in company safety meetings. Since safety is our top priority, we've gathered some tips to help you make the most out of our company safety meetings.

Why Safety Meetings
These informal, brief meetings allow you the opportunity to step up to date on potential workplace hazards and safe workplace practices, such as machinery use, tool handling, equipment use, and safety-related attitudes — basically anything that may contribute to accidents or illnesses in your workplace.

Meeting Basics

- Attending safety meetings is mandatory. Be aware of what days we hold meetings, and plan accordingly.
- Always sign our safety meeting log — recordkeeping is an important part of our safety and compliance program.
- Be an active participant. Some of the best safety ideas come from workers just like you because you often know best what and where the dangers are.
- During safety meetings, if you have something to add, don't hesitate to speak up.
- Notice that spots aren't being cleaned up properly or someone isn't follow lockout/tagout

procedures? We want to know so that we can cover the topic at a future safety meeting, and everyone can benefit.

- **Already know the day's topic?** Don't tune out as you may learn something valuable to add.
- **If you have an idea for a safety topic, chances are others will find it interesting too.** We encourage you to share the details with your supervisor or the safety committee.
- **Have a question, like how to lift safely or read a material safety data sheet (MSDS)?** Don't keep it to yourself — there are no dumb questions when it comes to safety.
- **Don't know all of our safety policies?** You can find more information on area bulletin boards or from a human resources representative.
- **Want to nominate someone for a safety award?** Contact your supervisor or safety committee with the details.

Regardless of your job title, working safety is everyone's responsibility at [JG_OfficialName]. See you at the next safety meeting!

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[Post](#)

[Add to Action Items](#)

[Add to Group](#)

EMAIL

Download

Description

Provides an overview for supervisors on safety meeting basics.

ACTION ITEMS (24)

Creating and maintaining content groups

Distribute valuable email campaigns when servicing or prospecting clients by creating content groups.

Grouping content in Action Items

Create a drip marketing campaign with ease from your **Action Items**—where you can store and group up to 60 resources. Once you're finished queuing content you need, you can group and distribute it all from the **Action Items** at once—with the same streamlined distribution process used to distribute a single resource.

How? From the content thumbnail flyout menu or the content details window, click **Action Items**. The count in the **Action Items** flyout will change to reflect the addition of the new resource.

Viewing and managing content in your Action Items

Action Items [Close]

Quickly group content and take action by sending a campaign, posting to a client portal, or saving the content as a group for future use.

24 items [Clear all]

- [Thumbnail] Health Reimbursement Arrangement (HRA) Ineligible Expenses [Close]
- [Thumbnail] Construction and Contracting Playing It Safe: Top Four Construction Hazards [Close]
- [Thumbnail] Construction and Contracting Risk Insights: All About Green Construction [Close]
- [Thumbnail] H1N1 Small Business Plan [Close]
- [Thumbnail] Equipment Breakdown Insurance (flyer) [Close]
- [Thumbnail] Health Care Reform: Changes to Health Accounts [Close]

[Email] [Post] [Save group]

Clear all
Remove all content from your *Action Items*.

Preview content
Click on a title or thumbnail to read through a resource, view its merge fields, and more.

Delete
Click the **x** next to a specific resource title and thumbnail to remove it from your Action Items.

Email
Schedule this content to be distributed via email.

Post
Schedule this content to be posted to a client portal.

Save group
Save all content in your *Action Items* as a new content group or add it to an existing content group.


Creating, editing, or deleting a content group

Easily distribute content targeted to a certain topic, create a reusable drip marketing campaign, or create a distribution that fits your clients exact needs by adding content to your **Action Items** and grouping it together.

For more information on how to use a content group to your advantage, see "Best practices with using content groups" on page 91.

Creating a custom content group

Create and maintain custom content groups for yourself or others at your agency. Custom content groups can be shared with all users at your agency or can be for your use only.

1. Locate a resource you want to add to the content group.
2. From the content thumbnail flyout or content details page, click **Action Items** ()
3. Repeat the previous steps for each resource you'd like to add to the content group.
4. After all desired content is in your **Action Items**, click the **Action Items** flyout.
5. From your **Action Items**, click **Save group**.
6. From the **Create Content Group** window, enter a group name and description.

Note: The description will be displayed on the **Content Group Details** page.

7. Select whether the **Visibility** of this group is **Public** or **Private**.

Note: For a private content group—only visible to the content group owner and users with administrative rights—make sure the **Private** option is not selected.

8. Set the distribution dates to:
 - **No dates:** Choose this option if your content group is only meant for organizing content.
 - **Actual dates:** Choose this option if the content in this group should be sent on specific dates.

- **Relative dates:** Choose this option if the content in this group is typically distributed on a relative interval, such as weekly or monthly. Choose a start date and the remaining distribution dates will be set based on the relative interval you've selected.

Note: The dates you set here will be defaulted for all future distributions of this group, but can be edited individually from the **Content to be sent** section in the distribution window.

9. When finished, click **Done**.

Editing a content group

Note: If you're the owner, or user with administrative rights, you have the ability to edit and delete a content group; however, content groups created by Zywave cannot be edited or deleted.

1. Look to the **Content Groups** option on the sidebar, and select **My Content Groups**.
2. Once you've located the content group you wish to edit, select **View**.
3. From the content details page, click **Edit**.
4. Make any necessary changes to the properties of the content group.
5. Click **Done** when finished, or click **Cancel** to discard all changes made.

Field	Description
Content group name	Enter a name that reflects the content of this content group.
Description	Enter an appropriate description for this content group.
Visibility	To create a public content group—visible to all users at your agency—you must click Public . For a private list—visible only to its owner and users with administrative rights—select Private .
Distribution dates	Set specific or relative distribution dates.
Content	This section will list each resource that belongs to this content group. To remove the respective resource from the distribution group, click Delete (X) .

Deleting an existing content group

Important:

Once a content group is deleted, it no longer appears in the search results.

Note: If you're the owner, or user with administrative rights, you have the ability to edit and delete a content group; however, content groups created by Zywave cannot be edited or deleted.

1. Locate the content group through the search feature.
2. Click **View** to access the content group details.
3. Click **Delete**.

Adding content to an existing content group

1. Locate a resource you want to add to this content group.
2. Click **View** to access the content group details page.
3. From the content details page, click **Add to Group**.
4. From the **Create Content Group** window, select **Existing group**.
5. From the **Select a content group** drop-down, choose a content group to add this content to.
6. Make any necessary changes, then click **Done**.

Setting up content group distribution dates

Setting actual distribution dates for content

Content can be set to distribute on specific dates. Each resource can be set up with a unique distribution and expiration date. This will ensure precise distribution of information that's time-specific.

Note: Set default dates for this group by setting distribution dates in the *Create Content Group* window. These dates can be edited at any time, allowing you to distribute the content group at your convenience.

Field	Description
Content name	This section will list each resource that's in this content group.
	<p>Note: To remove the respective resource from the content group, click Delete (X).</p>
Send date	The date on which this resource is scheduled to be distributed.

Setting relative distribution dates for content

Content can be scheduled to distribute on a relative schedule rather than on specific dates. The relative distribution schedule allows for a pre-defined schedule of weekly or monthly distributions, or the creation of a custom schedule. With a custom schedule, a user can send each resource in a time frame relative to the distribution date of the resource that precedes it.

Tip: Set default dates for content groups by setting distribution dates in the *Create Content Group* window. These dates can still be edited at any time, allowing you to distribute the content group whenever you wish.

Field	Description
Content name	This section will list each of the resources that are a part of this content group.
	<p>Note: Remove the respective resource from the content group by clicking Delete (X).</p>
Send content	The date on which this resource is scheduled to be distributed.
	<p>Select to send content:</p> <ul style="list-style-type: none"> • Weekly • Monthly

Emailing and posting content

From the content thumbnail flyout or the **Content Details** page, click **Email** or **Post**.

- **Email:** To distribute campaigns or send content to a specific client, we recommend you use this distribution method. With emailing you can stay in front of your clients by setting up campaigns that distribute all-year-round.
- **Post:** To provide the most up-to-date content to your clients, we recommend you use this distribution method. As soon as Zywave updates content that you've posted, that content will automatically update to the current version on your client's portal.

Selecting recipients

How? From the distribution window, look to the **To** field, then enter or copy and paste a recipient name into the box.

The screenshot shows the 'Edit Your Email' interface. At the top, it says 'Send vibrant, professional emails from Broker Briefcase® with a custom email template. Engage your clients with custom images, text, and merge fields.' Below this is a 'Send' button with a paper plane icon. To the right of the button are three input fields: 'To...', 'CC...', and 'From...'. The 'To...' field contains 'x casey.creer@zywave.com' and 'Sally W|' with '1 recipient' to its right. The 'CC...' field has a dropdown menu open showing 'Sally Wilson Tech Training Account' with a person icon. The 'From...' field contains 'casey creer'.

Using the To button to select recipients

To do a full recipient search for accounts, account contacts, and recipient lists, or to add all recipients at once:

1. In the distribution window, click **To**.
2. From the **Search Recipients** window, enter a partial or entire contact name in the search

field.

Note: You can also locate recipients by selecting a group option and browsing through *Accounts*, *Account contacts*, or *Lists*.

3. Select the account you wish to distribute to by clicking the account name; or, if you only want to distribute to one contact, click **View contacts**.
4. If necessary, manually enter recipient email addresses.

Tip: You can also select recipients by clicking the recipient name; or, to send to all valid accounts, click **Select all accounts**.

5. When finished, click **Confirm**.

Tip: Do you frequently find yourself distributing content to the same group of recipients? Save time and create a recipient list so you can quickly send them content in just one click!

For more information on saving recipients as a list, see "Best practices with distribution" on page 92.

Scheduling and editing the Content to be sent

Manage which content you want to send, how you want to send it, and when you want to send it, and view and edit merge fields within the content.

1. From the distribution window, look to **Content to be sent**, then click **Edit**.
2. If necessary, preview a resource by clicking on its name.
3. Select each resource's **Format**.



4. If necessary, to fix or edit content **Merge fields:**
 - a. Click **Incomplete** or **Complete**, as appropriate.

- b. From the **Edit Merge Fields** window, make any necessary edits.
 - c. When finished, click **Done**.
5. Enter a *Send on* date for each resource.
 6. If posting, enter an *Expires on* date for each resource.
 7. If posting, select a posting category by clicking the **Post to** column's drop-down for each resource.
 8. If necessary, delete a resource by clicking its **(x)** icon.
 9. When finished, click **Done**.

Send on
Enter a date or the distribution to send on.

Apply to all
Click the blue check mark to apply the same column entry to all instances.

Content to be sent Done

Title	Format	Merge fields	Send on	Apply to all	Delete
Automobile Driving Schools		None	<input type="text" value="11/03/2016"/>	<input checked="" type="checkbox"/>	
Driver Safety Policy		Complete	<input type="text" value="11/05/2016"/>	<input type="checkbox"/>	
Safe Driving Saves Money		Incomplete	<input type="text" value="11/15/2016"/>	<input type="checkbox"/>	
Winter Driving Safety		None	<input type="text" value="11/20/2016"/>	<input type="checkbox"/>	

Preview
Click the resource name to preview it.

Format
Select Word, Excel, or PDF format.

Merge fields
View and edit merge fields.

Why are some merge fields complete while others are left blank?

In the **Edit Merge Fields** window, you'll notice that fields are either blank or already complete.

Merge fields may already be complete because this information is stored in your Zywave applications, such as your user profile or your agency's profile. When possible, we simplify the process of setting up merge fields for you by automatically filling in the fields that we have information for.

Merge fields may be blank because we don't have information related to this field. It may also indicate that you're distributing content to an individual that we don't have information for; for instance, when you manually enter an email address. For more information, contact Partner Support at 866.499.9283.

Switching the email template

Perhaps you're not satisfied with your default email template for this distribution, so you want to switch your template to something more topic specific or agency branded. Look no further than our ***Email Template Gallery***, which houses a plethora of email templates created by Zywave experts and custom templates created by users at your agency.

Tip: You can save time by setting up an email template to be automatically used for all of your email distributions. For more information on setting up a default email template, see "Best practices with distribution" on page 92.

1. From the distribution window, look to the ***Email editor*** section, then click **Switch template**.
2. From the ***Email Template Gallery***, select to view **All**, **Zywave**, or **Custom** templates.
3. Find your desired email template.
4. From the template thumbnail, click **Select** to return to the distribution window and begin editing.

Choosing the right email template

Effortlessly engage viewers in your distribution with one of the many eye catching Zywave or agency custom email templates in Broker Briefcase®.

Zywave templates

Zywave experts have created a plethora of email templates to meet your every day needs. Select one of these already-made templates and effortlessly edit and customize it section-by-

section. Zywave templates include:

- **General:** None-themed templates that can be used for any piece of Broker Briefcase® content and edited to fit your needs.
- **Workflow:** Everyday workflow-based templates that cover sending a phone call or meeting follow up email to distributing breaking news and legislative updates.
- **Series-specific:** Series-based templates designed specifically for a Broker Briefcase® content series, such as *Workplace Wellness*.

Custom templates

Brand a distribution to your agency by selecting one of the custom email templates made by users at your agency; or create your own one-off email template from the ground up using HTML.

Important:

Creating or editing a **Classic** agency custom email template is suggested for advanced users with CSS and HTML coding experience.

Editing the email template

Effortlessly edit email templates by clicking on each section within the email template. If the email template doesn't quite fit your agency needs, quickly add, delete, or reorganize sections.

Note: Only users with administrative rights can save changes to an email template for later use. For more information, contact your agency administrator.

Getting to know email template sections

Design templates to fit your needs by editing the following sections:




Banner Image
Add an eye-catching banner image to your template.




Text Block
Enter text into your email body.

Image & Text
Enter text with a picture into your email body to enhance your message.

Add sections

Get started quickly by selecting a section from the following list. Click on a section to add it to the top of your email template, shown to the right, then use the up and down arrows to move it to the desired location.

BANNER IMAGE	TEXT BLOCK	TEXT & IMAGE
		
Add section	Add section	Add section

CONTENT LAYOUT	DIVIDER	SIGNATURE
		
Add section	Add section	Add section

Content Layout
Add content you want to distribute to clients or prospects, and adjust the content layout.

Divider
Add a divider between sections you want to break up. Make it stand out by selecting a flashy color.

Signature
Add your signature and logo for a personal touch. Your name and contact information will also be included.

To edit the background and surrounding color of your email template, access the **Edit general settings** section by clicking on the background of the email template preview.

Editing an email template

1. From the **Edit Your Email** page, edit the template **Subject**.
2. From the **Edit text block** field, enter the email message.
3. From the template preview to the right, click on each section to edit it.

4. To add, delete, or move a section:

- **Add:** Look to the top of the email template, then click **Add sections**. From the sections editor, look to the section you wish to add, then click its **Add section** button.
- **Delete:** From the template preview, point to the section, then click its **(x)** icon.
- **Move:** From the template preview, point to the section, then click its **Up** and **Down** arrows.

5. To change the **Background color** and **Surrounding color** of the template, click the template's background to access the **Edit general settings** field.

Adding an image to an email template

Engage viewers with your email by adding an image from the **Banner Image Gallery**; or spice up your email message by adding a colorful image to your text from the **Portrait Image Gallery**. Conveniently link your clients and prospects to important information by adding a link to an image

Important:

These instructions do not apply to *Classic* agency custom email templates.

Adding a banner image

1. From the **Email editor** section, look to **Add sections > Banner Image**, then click **Add section**.
2. From the email template, click the **Banner Image** section to open its editor.
3. Click **Change/upload image**.
4. From the **Banner Image Gallery**, select an image; or, click **Upload image** to upload your own custom image.
5. Click **Select** and the image will be added to your email template.
6. As appropriate, hyperlink this image to a site by entering the site's web address.
7. As appropriate, enter text to display if the person you're emailing cannot view this image.

Adding a portrait image

1. From the **Email editor** section, look **Add sections > Text & Image**, then click **Add section**.
2. To move the section to a different location on the template, point to the section, then click its **Up** or **Down** arrows.
3. From the email template, click the **Text & Image** section to open its editor.
4. From the section's editor, select **Layout**, then click the section layout you wish to use.
5. To edit the section's text, click **Text**, then enter the text and modify it using the text editor toolbar.
6. To add the image, click **Image**.
7. Click **Change/upload image**.
8. From the **Portrait Image Gallery**, select an image; or, click **Upload image** to upload your own custom image.
9. Click **Select** and the image will be added to your email template.
10. As appropriate, hyperlink this image to a site by entering the site's web address.
11. As appropriate, enter text to display if the person you're emailing cannot view this image.

Inserting merge fields into an email template

Automatically populate a template with your agency and client information by adding the appropriate merge fields, such as adding your agency's official name with [b_officialname].

Merge field types

There are a few different types of merge fields that you can add to your email templates:

Important:

Content merge fields are only available to add to **Classic** agency custom email templates.

- **Broker:** Select these merge fields to add your agency information to an email template.
- **Broker contact:** Select these merge fields to add your broker information to an email

template, such as your name, your title, your email address, and more.

- **Client contact:** Select these merge fields to add your clients' information to an email template, such as their official name, address, phone number, first name, last name, and more.
- **Content:** Select these merge fields to add information about the content you are distributing, such as a content title, content descriptions, and more.

For more information on merge fields, look to the *Merge Fields Reference Guide* in **Broker Briefcase® Help > Additional resources**.

How? You can enter or copy and paste a merge field into the text; or, to ensure you have the right merge field and that it's properly formatted you can:

1. From the **Edit text block** section or the **Classic** template editor, move your cursor to where you want to insert the merge field on the email template.
2. From the template editor toolbar, click **Insert merge fields**.
3. From the **Insert Merge Fields** window, click to view **Broker**, **Broker contact**, **Client contact**, or **Content** merge fields.
4. Locate the merge field you want to add, then click **Insert**.
5. Repeat these steps until all desired merge fields have been added.

Creating a Classic custom email template

Completely customize and brand an email template to your agency by building it from the ground up using CSS and HTML source code.

Important:

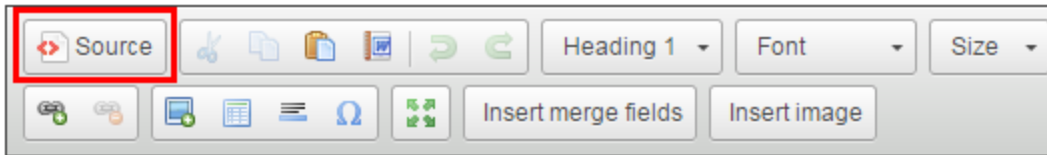
This is recommended for advanced users with CSS and HTML coding experience.

Note: General users can create a **Classic** email template for one-off distributions; however, only admin users can save **Classic** templates they've created for future distributions.

For more information, contact your agency administrator.

1. From the **Email Template Gallery** page, look to the bottom of the screen, then click **Or, to use CSS and HTML source code to create your email, click here.**
2. From the **Email Template Administration** page, enter a template **Title**.

Tip: To use CSS and HTML code, click **Source**. To preview your CSS & HTML code, click **Source** again.



3. Place your cursor where you wish to insert a merge field in the email template.
4. From the template editor toolbar, click **Insert merge fields**.

Important:

You must add at least one **Content** merge field to your email template.

5. When finished, click **Publish**.

Adding an image

Engage your viewers by adding an eye-catching image to your **Classic** email template.

1. From the body, place your cursor where you wish to insert the image, then click **Insert image**.
2. From the **Classic Image Gallery**, look to the **All** drop-down, then select whether you want to view **All**, **Zywave**, or **Custom** images.

Tip: To add your own image to the **Classic Image Gallery**, look to the bottom of the window, then click **Upload image**.

3. Click on the image you wish to add, then click **Select**.

Hyperlinking an image

1. Add an image to the email template, then double click the image.
2. From the **Edit text & image** section, click **Image**.

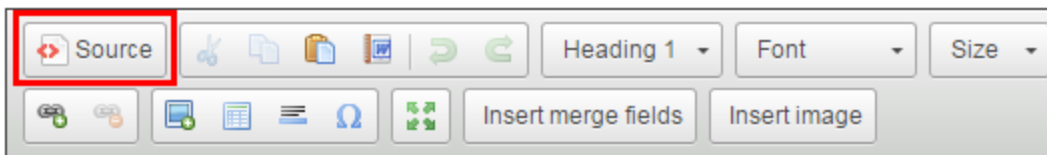
3. From the ***Make this image a link to a site by entering that site's web address*** field, enter a site web address.
4. From the ***Enter text to display if the person you're emailing cannot view this image*** field, enter link text.
5. When finished, click **Publish**.

Editing a Classic custom email template

Select and edit an email template that's been built from scratch and completely branded to your agency by users at your agency. You can identify these email templates from the ***Email Template Gallery*** by the word ***Classic***—placed at the top-left of the template thumbnail.

Important: This is suggested for advanced users with CSS and HTML coding experience.

1. From the ***Edit Your Email*** page, edit the template ***Subject***.
2. From the email body, edit any text; or, to edit CSS and HTML code, click **Source**.



3. As desired, add an image or a hyperlink.
4. When finished, click **Publish**.

Viewing the distribution calendar

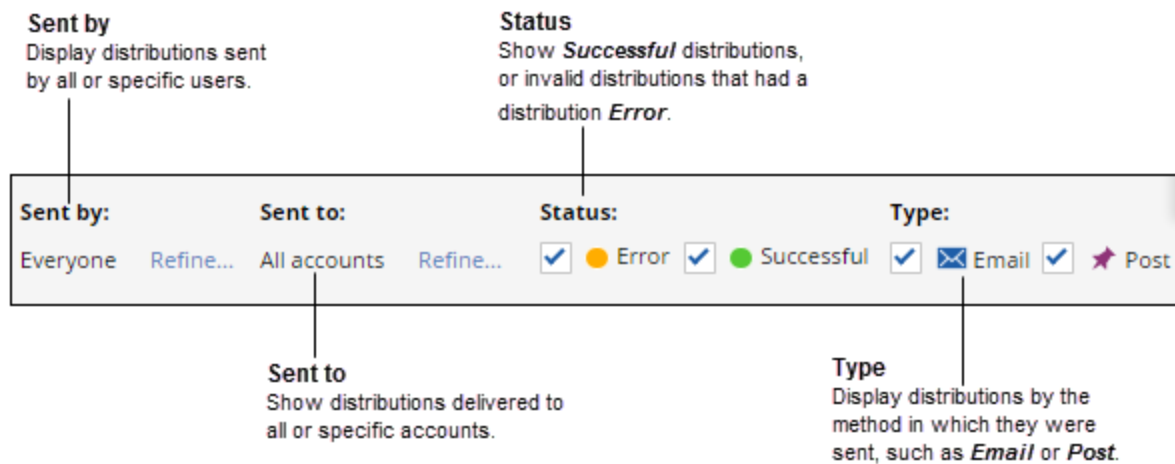
The **Calendar** is an essential resource during renewal time; it can help you show the value you add by assisting you in compiling a stewardship report. The **Calendar** can also be used to review and manage your distributions, and to see which clients received each distribution.

Viewing distribution details from the calendar

Whether you're looking up a past distribution or reviewing future distributions, stay on top of content you're sending to clients from the Broker Briefcase® calendar.

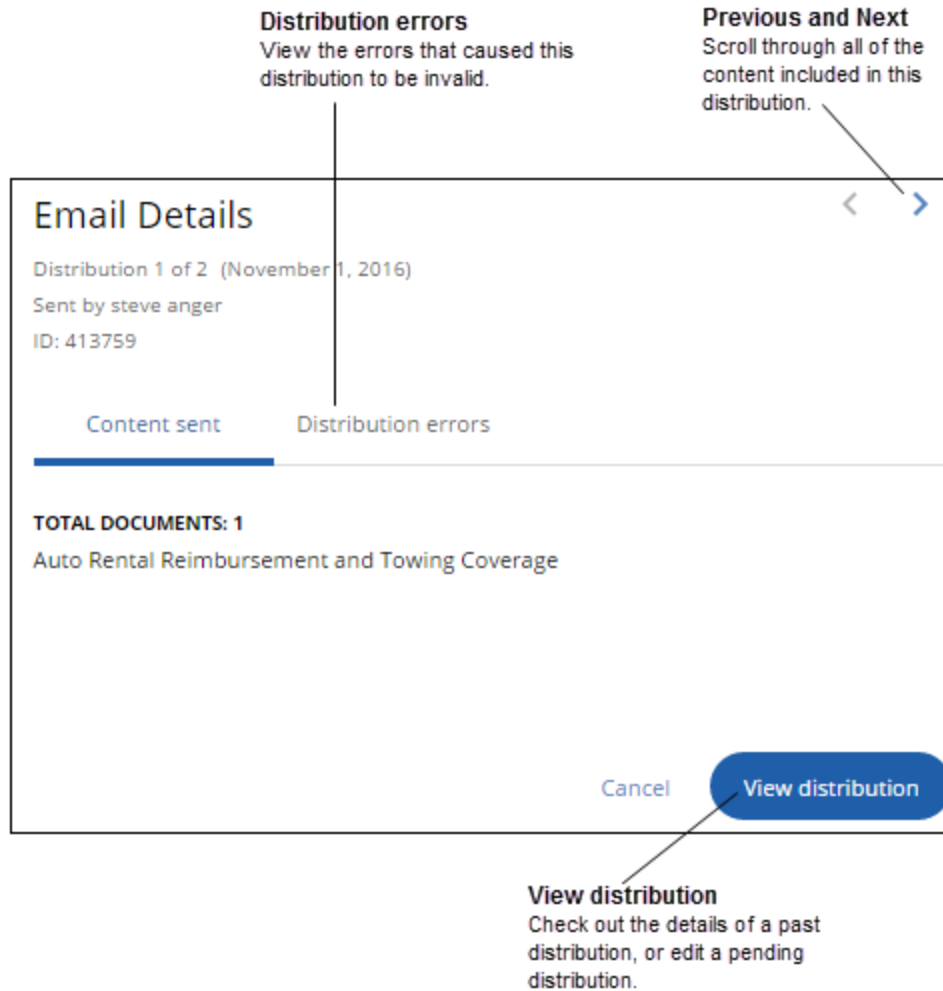
Filtering and the calendar

You can quickly find what you're looking for by using the **Calendar** filtering options.



Viewing distribution details

From the **Calendar** you can click on a distribution to open the **Email Details** window and view more details—such as content that's been distributed, by whom, and when—for that specific distribution.



Editing, deleting, and copying a distribution from the calendar

From the Broker Briefcase® *Calendar*, you can:

- View all past and pending distributions, find the content, and edit it as required.
- Delete one or all resources from any pending email or client portal posting distributions.
- Save time by quickly duplicating a previous distribution using the **Copy** option—for quicker future distributions, reuse and edit details.

Editing a distribution

Note: Content that's already been distributed cannot be edited or deleted.

1. From the **Communications** menu, click **Calendar**.
2. Find the appropriate pending distribution, then click the resource to display distribution details.
3. Click **Edit**, then enter appropriate values for the editable fields:

Field	Values
On a per resource basis	<ul style="list-style-type: none"> • Distribution send on—this date must occur on or after today's date • Posting expires on • Posting category • Merge fields
On a per distribution basis	<ul style="list-style-type: none"> • Recipients—this includes agency contacts notified of the distribution • Sender • Email options—this includes the email template, subject, and body

Deleting a distribution

Important:

The option to post content to a client portal is only available to agencies that have purchased a client portal.

Note: Deleting a client portal posting that's already been distributed will expire the posting. This will not delete the distribution record, as it will be maintained in the *Distribution history*.

1. From the **Communications** menu, click **Calendar**.
2. Find the appropriate distribution, then click on it.
3. From the **Email Details** or **Post Details** window, click **Delete**.

Note: You can only delete distributions that you created and distributions being sent on your behalf.

Note: This will cancel any pending emails and client portal postings, or expire any current client portal postings.

Deleting a resource from a distribution

1. From the **Calendar**, click on the distribution you wish to delete a resource from.
2. From the **Email Details** or **Post Details** window, click **Edit**.
3. From the **Edit Your Email** or **Edit Your Post** window, look to **Content to be sent**, then click **Edit**.
4. From the relative row of the resource you wish to remove, click delete (**x**).
5. Click **Update** to save the changes that were made to this distribution.

Copying an email distribution

Note: These same instructions can be followed to copy a portal posting distribution.

1. From the navigation sidebar, click **Calendar**.
2. Locate a distribution, then click on it.
3. From the **Email Details** window, click **Edit** or **View distribution**.
4. From the **Edit Your Email** or **Review Your Email** screen, look to the upper-right and click **Copy distribution**.
5. Edit the distribution, as needed.
6. Click **Send**.

Collecting success data with reporting

Perhaps you're curious to see who's been receiving your distributions, who's been opening your distributions, who's been using the content within your distributions, and more. Obtain detailed or summary information about your Broker Briefcase® distributions, content, or usage by running a report.

Communication tracking reports

Email Statistics Dashboard

Continue to distribute the most valuable emails by viewing detailed distribution feedback on the **Email Statistics Dashboard**. Identify emails your clients find valuable by analyzing exact data on the emails you send. From the number of emails delivered to the percentage of unique clicks, gain insight on who's viewing your distributions.

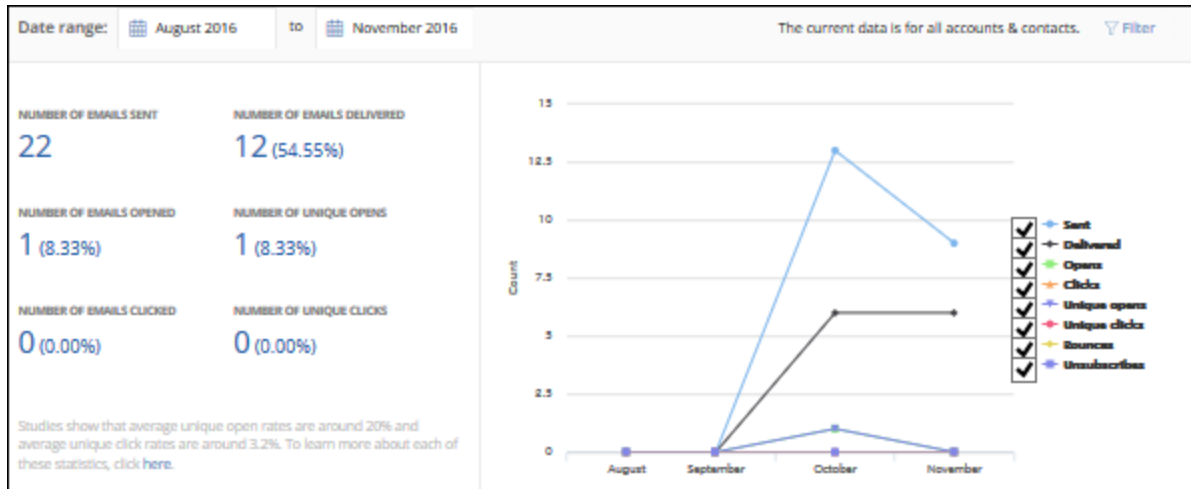
Important:

This report will only include data from the date that Broker Briefcase® started recording data for this report. Look to the top of the page to view this date.

1. From the Broker Briefcase® navigation sidebar, click **Reports**.
2. From the **Communication tracking** tab, look to the **Email Statistics Dashboard**.
3. Enter a *Date range*.

Note: Results will only show statistics for the selected date range.

4. To narrow the graph results, look to the list of fields to the right of the graph, then select only the fields you wish to view.



Tip: View more information on each statistic with *Email Statistics Dashboard: What Does This Mean?* by clicking [Here](#) in the blue tip box at the bottom-right of the dashboard.

Filtering the Email Statistics Dashboard by specific accounts or contacts

1. From the top of the dashboard, click **Filter**.
2. Select whether to filter by **Accounts** or **Account contacts**.
3. To narrow results even further, enter an account or contact name, then click **Search** (magnifying glass).
4. To add all the results, click **Select all**; or, to add individual accounts or contacts, click **Add (+)** from the account's or contact's relative row.
5. When finished selecting accounts or contacts, click **Confirm**.

Distributions by Account

View content that's been emailed or posted during a specific time period, by account. Gain insight on how often this content is used by recipients.

Note: The data that appears in this report is determined by the date range selected on the reporting home page. Only distributions scheduled within this date range will be returned.

Fields shown:

- Account name
- Account status
- Contact name
- Contact status
- Content title
- Content language
- Distribution date
- Distribution type
- Content group name
- Total views

Note: The value that appears for *Total views* will reflect all views of the content since it was distributed—not just the number of views within the date range selected.

Distributions by Date

View a detailed list of emails or posts sorted by dated distributed, for a specific time period, to gain insight on how often your agency is reaching out to clients.

Note: The data that appears in this report is determined by the date range selected on the reporting home page. Only distributions scheduled within this date range will be returned.

Tip: Filter by individual for a clearer picture of which user at your agency scheduled a specific distribution.

Fields shown:

- Distribution date
- Content title
- Content group name
- Distribution type
- Recipient
- Posting category
- Contact status
- Distribution by
- Distributed on behalf of
- Expiration date
- Account status

Distributions of Campaigns

View campaigns that were distributed over a specific time period, as well as how often the campaign was used by recipient, to gain insight on reusable campaigns.

Note: The data that appears in this report is determined by the date range selected on the reporting home page. Only distributions scheduled within this date range will be returned.

Fields shown:

- Content group name
- Content title
- Content language
- Distribution type
- Total distributions
- Total recipients
- Total views

Note: The value that appears for *Total views* will reflect all views of the content since it was distributed—not just the number of views within the date range selected.

Distributions with Errors

View a summary of distributions with errors for a specific time period, as well as error details, to ensure distribution errors are fixed.

Fields shown:

- Distribution date
- Content title
- Content language
- Distributed by
- Error messages

Lists

View the public and private recipient lists currently available, as well as recipient details, to ensure recipient lists are up-to-date.

Tip: Filter by account for a clearer picture of which recipients received a given distribution.

Fields shown:

- List name
- Created by
- Public/Private
- Member
- Email address
- Account status
- Contact status

Portal Postings by Account

View a detailed list of content that's been posted to your clients' portals to keep track of content your agency has been distributing.

Important:

This report is only available for Broker Briefcase® users with access to client portals. For more information, contact your Zywave Account Executive.

Fields shown:

- Account name
- Contact name
- Content title
- Content language
- Posting category
- Expiration date
- Posted by

Broker/client usage reports

Broker Logins

View how often users at your agency log in to Broker Briefcase®, as well as the last time they logged in, to gain insight on Broker Briefcase® usage at your agency.

Note: The data that appears in this report is determined by the date range selected on the reporting home page. Only distributions scheduled within this date range will be returned.

Fields shown:

- User first name
- User last name
- Total logins
- Last login

Note: The value that appears for **Total views** will reflect all views of the content since it was distributed—not just the number of views within the date range selected.

Lead Broker Briefcase® Users

View a detailed list of emails and posts for a specific time period, sorted by user, to gain insight on your top users at your agency.

Note: The data that appears in this report is determined by the date range selected on the reporting home page. Only distributions scheduled within this date range will be returned.

Fields shown:

- User first name
- User last name
- Content group name
- Distribution date
- Distribution type
- Content title
- Recipient

Most Popular Client Content

View a detailed list of content that's being used by clients via their client portal to gain insight on what topics they're most interested in.

Important:

This report is only available for Broker Briefcase® with access to client portals. For more information, contact your Zywave Account Executive.

Note: The data that appears in this report is determined by the date range selected on the reporting home page. Only distributions scheduled within this date range will be returned.

Fields shown:

- Account name
- Account status
- Contact status
- Content title
- Contact name
- Total views

Note: The value that appears for *Total views* will reflect all views of the content since it was distributed—not just the number of views within the date range selected.

Top Viewed Distributed Content

View how often emailed or posted content is clicked on by clients, for a specific time period, to gain insight on what distributions they find most valuable.

Note: The data that appears in this report is determined by the date range selected on the reporting home page. Only distributions scheduled within this date range will be returned.

Fields shown:

- Content title
- Content language
- Total views

Note: The value that appears for *Total views* will reflect all views of the content since it was distributed—not just the number of views within the date range selected.

Available content reports

Content Groups

View a detailed list of the content groups currently available in Broker Briefcase® to gain insight on valuable campaigns to distribute to clients.

Note: Fields denoted with an asterisk (*) can be found in both the Microsoft® Excel® and Word® version of this report.

Fields shown:

- Content group name*
- Content group description*
- Schedule type*
- Content title*
- Distribution date*
- Source*
- Public/Private*

Content

View a detailed list of content that's currently available in Broker Briefcase® to gain insight on valuable content to distribute to clients.

Note: Fields denoted with an asterisk (*) can be found in both the Microsoft® Excel® and Word® version of this report.

Fields shown:

- Content title*
- Content description*
- Content tags
- Content language*
- Line of business
- Source
- Content merge fields

Portal Content

View a detailed list of content currently available to clients via their client portal to gain insight on content they may find valuable.

Important:

This report is only available for Broker Briefcase® users with access to client portals. For more information, contact Zywave Account Executive.

Note: Fields denoted with an asterisk (*) can be found in both the Microsoft® Excel® and Word® version of this report.

Fields shown:

- Content title*
- Content description*
- Content tags*
- Content language
- Line of business
- Source
- Content merge fields

Running a Report

1. From the Broker Briefcase® navigation sidebar, click **Reports**.
2. Locate the report you wish to run.
3. If prompted, enter a *Date range*.

Note: The data range selected will determine the data that's returned in your report. If prompted, select a *Line of business*.

4. If prompted, select which **Accounts** or **Users** to filter the report by.
5. Select your desired output:



6. If necessary, to remove unwanted columns:
 - a. Click **Refine...**
 - b. From the **Edit Report Data** window, click the **(x)** icon next to any unwanted columns; or, click **Restore defaults** to add the columns back.
 - c. Click **Save**.
7. Click **Export data**, then wait for the **Report Execution Progress** window to load.
8. Click **Open** or **Save**, as appropriate.

Note: When a large amount of data is returned in an Microsoft® Excel® report, a new tab will be created in the spreadsheet.

Filtering reports using Microsoft® Excel®

Customize a report to only show information you need by applying filters. While you're able to filter by any criteria within the report, here are a few that are most commonly used:

- Content tags.
- Content merge fields.
- Account.
- Content views.
- Individuals.

How to set filters

1. Run a report.
2. Highlight the column headers (shown in blue).
3. From the toolbar look to **Home > Editing**.
4. Click **Sort and Filter > Filter**.

For more information on filtering a report, refer to *Microsoft® Excel® Help*.

To filter by content tags using Microsoft® Excel® 2007

1. Click the drop-down arrow for the **Tags** or **Merge fields** column, as appropriate.
2. Scroll to **Text filters**, and click **Contains**.
3. Click the **Or/And** option, then enter appropriate filter text.

Tip: If you surround your filter with asterisks (*), only the tags that include this term will be shown; for instance, if you enter *safety* the report will be filtered to show each tag that includes this term.

4. Click **OK** and this report will filter to only show instances that have your filter text.

Filtering by account

To display results for a specific account, you may want to filter a report—such as the **Distribution—by account** report; to do this filter by account.

To filter by account using Microsoft® Excel® 2007

1. Click the **Account** column drop-down arrow.
2. From the account list, click **(Select all)** to clear all options.
3. Scroll through the account list, and select the accounts you want to view in this report.
4. To apply this filter, click **OK**.

Filtering by content views

To display resources by the number of views, you may want to filter a report—such as the **Distributions by content groups** report); to do this filter by content views.

To filter by content views using Microsoft® Excel® 2007

1. Click the **Views** column drop-down arrow.
2. As appropriate, click **Sort smallest to largest** or **Sort largest to smallest**.

Filtering by individuals

To display results sent or received by a certain individual, you may want to filter a report—such as the **Distributions with errors** report; to do this filter by one of the following: account contact, created by, recipient, or distributed by.

Filtering by an individual using Microsoft® Excel® 2007

To filter by an individual—by an account contact, created by, distributed by—follow these steps:

1. In the column you want to filter, click the drop-down arrow.
2. From the member list, click **(Select all)** to clear all options.
3. Scroll through the member list, then select the individuals you want to view in your report.
4. To apply this filter, click **OK**.

Tips for formatting your report

To quickly adjust the columns in your report to auto-fit, do the following:

Important:

This must be done before you freeze panes in your report.

- Press **CTRL + A** to select all the columns, then double-click any boundary between column headings.

To freeze the title, subtitle, and column headings in your report, do the following:

- Below the rows you want to keep visible when you scroll, select the rightmost cell.
- Click the **View** tab.
- From the **Window** group, select **Freeze panes > Freeze panes**.

Administrative features

As an administrative user, you can further manage the content and distribution processes of Broker Briefcase® from behind the scenes.

Managing agency users

Effortlessly add, edit, or delete agency users by accessing the Account Management Center **Manage Users** page right from Broker Briefcase®. From the navigation sidebar, look to **Communications**, and select **Manage Accounts**. From the Account Management Center, go to **Setup > View user list**.

Creating an email template for future distributions

Create a branded agency custom email template to be used by anyone at your agency for any distribution. Just copy an email template from the **Email Template Gallery**, then edit the copied email template to fit your needs.

1. From the Broker Briefcase® navigation sidebar, look to **Communications**, then click **Email Template Gallery**.
2. From the **Email Template Gallery**, locate the email template you wish to copy, then click **Select**.
3. From the **Email Template Administration** page, click **Copy** and you will be redirected to the copied template.
4. From the copied template, edit the template **Title**, **Description**, and **Subject**.
5. As desired, edit the template sections.

Note: If you're not finished creating your email and would like to return to it at a later time, click **Save as draft** and a hidden draft of the template will be saved in the **Email Template Gallery**.

6. When finished, click **Publish** and the template will be saved under **Custom** in the **Email Template Gallery**.

For more information on editing an email template, look to "Editing the email template" on page 60.

Creating a Classic email template for future distributions

Take full control of your branding and design by building a **Classic** email template from the ground up with CSS and HTML source code.

Important:

This is recommended for advanced users with CSS and HTML coding experience.

Note: When viewing the **Email Template Gallery**, agency users will see the word **Classic** at the top of the template's thumbnail.

1. From the Broker Briefcase® navigation sidebar, look to **Communications**, then click **Email Template Gallery**.
2. From the **Email Template Gallery**, look to the bottom of the page and click **Or; to use CSS and HTML source code to create your email, click here** to create your own.
3. From the **Email Template Administration** page, enter the template **Title**, **Description**, and **Subject**.
4. From the email body, click **Source**, then begin entering CSS and HTML.

Note: If you're not finished creating your email and would like to return to it at a later time, click **Save as draft** and a hidden draft of the template will be saved in the **Email Template Gallery**.

5. When finished, click **Publish** and the template will be saved under **Custom** in the **Email template Gallery**.

For more information on creating a Classic email template with CSS and HTML code, look to "Creating a Classic custom email template" on page 64.

Deleting or hiding email templates

Keep your custom email templates up-to-date by deleting old templates that no longer fit your agency's needs. Don't want other users to view an email template? No problem. Broker

Briefcase® gives you the option to hide Zywave or custom email templates from other users at your agency.

Deleting an email template

Note: Zywave default templates cannot be deleted. Only custom email templates and copies of Zywave default templates can be deleted.

1. From the Broker Briefcase® navigation sidebar, look to **Communications**, then click **Email Template Gallery**.
2. From the **Email Template Gallery**, click **Custom**.
3. From the email template you wish to edit, click **Select**.
4. From the **Email Template Administration** page, click **Delete**.

Hiding an email template from other agency users

How? To hide a Zywave email template, from the **Email Template Administration** page, select **Hide template**.

How? To hide an agency custom email template—including copied Zywave templates—save the template as a draft.

Importing custom content

You can improve your distribution process by importing custom content your agency distributes the most into Broker Briefcase®.

Note: The upload system will automatically detect merge fields in your content when uploading. Make sure merge fields are formatted properly in your content before uploading so the system can detect them.

For more information on formatting merge fields, look to the *Merge Fields Reference Guide* in **Broker Briefcase® Help > Additional resources**.

1. From the Broker Briefcase® navigation sidebar, look to **Content**, then click **Custom Content**.
2. From the **Custom Content** page, click **Import content**.
3. From the **Import Content** window, click **Browse** to select content you want to import.

Note: To add a Spanish version of this content, look under the **Browse** button and click **+ Add Spanish version**.

4. Enter a **Content Name**.
5. As necessary, enter a **Description** that can be seen when the content is searched by users.
6. From the **Content tags** field, click the **Select category** drop-down.
7. Select a category, then select the tag you want to apply from that category.

Note: Some categories will have tags automatically included with upload; for instance, if you select the **Type/Format** category, your upload will automatically include the tag for Microsoft® Word®, Excel®, and so on based on the format of the content you're uploading.

8. As necessary, add more tags.
9. As necessary, select **Make this content available to other locations?**

Important:

The multiple locations feature is only available to users with global administrative rights.

Note: From the additional locations table, clicking **Add all locations** will automatically include any additional agency locations added in the future. Future locations will not be included automatically if selected individually.

10. When finished, click **Upload**.

Editing or deleting custom content

Keep your custom agency content up-to-date by continuously editing it, and keep it organized by deleting any content that no longer fits your agency's needs.

Editing custom content

1. From the Broker Briefcase® navigation sidebar, look to **Content**, then click **Custom Content**.
2. Locate the content you wish to edit.
3. Click **View** to open the content details page.

4. Look to the right of the content image, then click **Edit**.
5. If applicable:
 - Edit the **Content name** or **Description**.
 - To add or remove keyword tags, look to **Content tags**.
 - Select whether or not to upload the resource to multiple locations.

Note: Each custom agency resource will be automatically tagged with they keyword **Imported content**, and the appropriate file type tag; such as, a Microsoft® Word® document, or PDF.

6. When finished, click **Save**.

Deleting custom content

1. From the Broker Briefcase® navigation sidebar, look to **Content**, then click **Custom Content**.
2. Locate the content you wish to delete.
3. Click **View** to open the content details page.
4. Look to the right of the content image, then click **Delete**.

Customizing posting categories

If you have MyWave® portals, you can post content to them directly from Broker Briefcase®. When posting content, you'll need to select a category in which the content will be posted. You will find a menu of default categories in the **Post to this category** drop-down.

Note: Posting categories will only show in MyWave® and MyWave Elements® portals. Content will still be posted in MyWave Connect®, but no categories will be assigned.

Adding a new posting category

Add new posting categories if the default posting categories in Account Management Center don't fit your agency's needs.

Note: Posting categories will only show in MyWave® and MyWave Elements® portals. Content will still be posted in MyWave Connect®, but no categories will be assigned.

1. From the Broker Briefcase® navigation sidebar, look to **Communications**, then click **Posting Categories**. This will redirect you to the Account Management Center.
2. Click **Create new category**.
3. Enter an appropriate name for this posting category.
4. To adjust the order of this category in relation to the others, point to the posting category number, then use the **Up** and **Down** arrows.
5. Click **Save changes** when finished, or **Cancel all changes** to discard all changes made.

Editing a posting category

Edit a posting category if you feel the name doesn't fit your agency's needs, or reorder posting categories if you feel they should be arranged differently.

1. From the Broker Briefcase® navigation sidebar, look to **Communications**, then click **Posting Categories**. This will redirect you to the Account Management Center.
2. From the row of the category you wish to edit, click the category name.
3. To rename this posting category, enter a new name in the text field.
4. To adjust the order of this category in relation to the others, point to the posting category number, then use the **Up** and **Down** arrows.

Tip: To restore a posting category name back to its Zywave default, look to the right of the category name text box, then click the **Revert** icon.

5. Click **Save changes** when finished, or **Cancel all changes** to discard all changes made.

Deleting an existing posting category

If you feel that a posting category in Broker Briefcase® will not be used by your agency, you have the option to delete it.

Note: Zywave default categories, and categories with content currently posted to them, cannot be deleted. Only custom categories that don't have any content posted to them can be deleted.

1. From the Broker Briefcase® navigation sidebar, look to **Communications**, then click **Posting Categories**. This will redirect you to the Account Management Center.
2. From the row of the category you wish to delete, click the **Delete** checkbox.
3. Click **Save changes** when finished, or **Cancel all changes** to discard all changes made.

Best practices with Broker Briefcase®

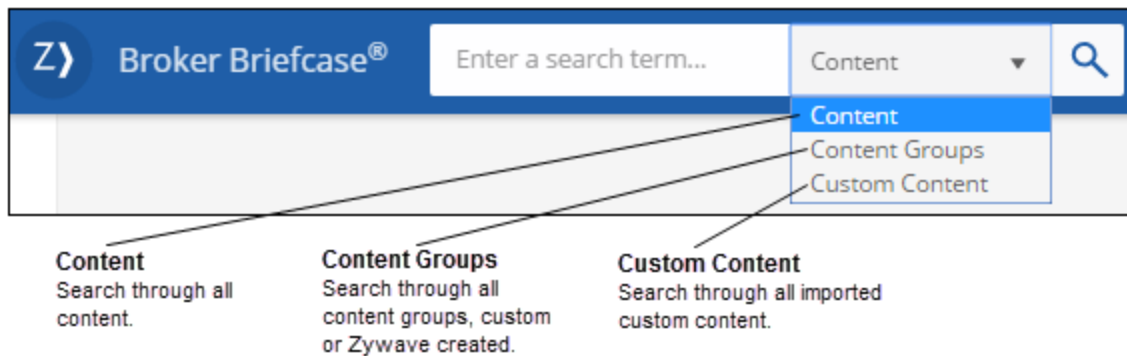
Broker Briefcase® is the ultimate marketing communications tool and can help take your agency to new heights when the application is used to its full capacity. Follow these best practices to get the most out of your Zywave tool.

Best practices with searching for content

Save time and narrow your content library search by selecting a search option, and ensure your search terms return results you expect by using the following advanced search features!

Selecting a search option

When searching the Broker Briefcase® content library, click:



Using advanced search features

Search feature	Description
""	<p>Inserting double quotes around a term ensures the exact wording and word choice is searched.</p> <p>Example: A search for food services will include results where either or both terms (food and/or services) appear. However, a search for "food services" will include results with that specific phrase.</p>

Search feature	Description
+	<p>Adding a plus sign immediately before a word pulls in content that contains the word exactly as you spelled it.</p> <p>Example: A search for +health care will not include results containing healthcare.</p>
OR	<p>Entering OR between topics pulls content containing either search topic.</p> <p>Example: A search for health care OR reform will give you results about either topic, whereas health care reform will show content focused on this specific topic.</p>
-	<p>Adding a minus sign immediately before a word excludes this word from the search results.</p> <p>Example: A search for electricity -newsletters will exclude any newsletters related to electricity.</p>

Best practices with using content groups

There are a few different ways that you can use content groups to demonstrate your agency value while enhancing your daily workflow.

Conveniently set-it-and-forget-it

We know you're busy so we've developed a way for you to take advantage of drip marketing and effortlessly send your clients and prospects content all-year-round. Set up a drip marketing campaign by scheduling a distribution date for each resource within a content group, then forget it and let Broker Briefcase® do the rest.

For more information on creating a drip marketing campaign, look to *Drip Marketing Best Practices* in **Broker Briefcase® Help > Additional resources**.

Fit your clients' needs

If you want to quickly create a custom content group to fit your clients' needs, customize a Zywave default content group by merely adding or removing any content and adjusting the distribution dates.

For more information on creating a content group, look to "Creating, editing, or deleting a content group" on page 52.

Distribute targeted content

Want to create a content group from scratch that's completely tailored to your clients' needs? Find and select pieces of content by subject, line of business, industry, and more and add them to your **Action Items** to create a custom, targeted content group.

For more information on adding content to your Action Items, look to "Grouping content in Action Items" on page 50.

Create reusable campaigns

You can save time and create reusable campaigns from content groups. To make it more personal, create email templates that target each audience you distribute to, then distribute the campaign any number of times using your customized email templates.

Important:

Only administrative users can create reusable email templates.

For more information, contact your administrator.

For more information on creating an email template, look to "Editing the email template" on page 60.

Distribute up-to-date legislative content

Conveniently distribute the latest legislative content to your clients by compiling it into a content group that you can distribute whenever Zywave experts update this content.

For more information on creating a content group, look to "Creating and maintaining content groups" on page 50.

Best practices with distribution

Save time when setting up a distribution by saving recipients you regularly send content to as a list, and by setting up a default email template for all your distributions. Also, ensure your distributions are successful by taking a look at our recommended distribution methods.

Choosing the most successful distribution method

We recommend using the distribution features **Email** and **Post** rather than downloading hard copy to your desktop. Here's why:

- **Download:** Your clients may not receive the most up-to-date information because this option creates a static version of the resource that remains unchanged unless you manually edit it.
- **Emailing or Posting:** You clients will receive the most up-to-date information because these options allow a resource to be reviewed by Zywave experts and updated consistently.

Saving recipients you regularly send content to as a List

Do you distribute to list of contacts on a regular basis? If so, you may want to save this set of recipients as a list. For instance, you can segment contacts by size, line of business, or preferred level of communication, and target each group with resources to suit their unique needs. Conveniently customize and save a group of:

- Individual account contacts
- Accounts
- Other lists

Creating a recipient list

1. From the distribution window, click **To**.
2. From the **Search Recipients** window, add the desired recipients.
3. From the bottom of the window, select **Save recipients as a list**.
4. Click **Confirm**.
5. From the **Save as List** window, enter a *List name*.
6. Select whether to make this list **Public** to everyone, or **Private**.
7. Click **Save** when finished, or click **Cancel** to discard any changes.

Note: You can also create lists by looking to the *Communications* menu clicking **Lists** from the navigation sidebar. To add an appropriate list name and recipients, click **Create list**.

Selecting contacts for a new or an existing list

1. From the navigation sidebar look to *Communications*, then click **Lists**. This will redirect you to the Account Management Center.
2. Click **More** > **Edit** for the appropriate list.
3. Click to **Add** members.
4. From the *Edit Your List* window, enter a partial or entire contact name in the search bar.

Note: You can locate recipients by selecting a filtering option and browsing through *Accounts*, *Contacts*, or *Lists*.

5. Select the account you'd like to distribute to by clicking the account name; or, to distribute to only one contact, click **View contacts**.
6. If necessary, manually enter recipient email addresses.
7. Click **Save**.

Removing a contact from a list

1. From the navigation sidebar look to *Communications*, then click **Lists**. This will redirect you to the Account Management Center.
2. Click **More** > **Edit** for the appropriate list.
3. In the respective row of the contact you'd like to remove from the list, click delete (**x**).
4. Click **Save**.

Deleting a list

1. From the navigation sidebar look to *Communications*, then click **Lists**. This will redirect you to the Account Management Center.
2. Click **More** > **Edit** for the appropriate list.
3. In the respective row of the list you'd like to remove, click delete (**x**).
4. Click **Save**.

Setting a default email template to start all your distributions with

Do you find yourself using the same email template for the majority of your distributions? Set your most commonly used email template as your global default and each distribution you create will automatically start with that template.

Note: Only administrative users can set a default email template.

To set a default email template:

1. Look to the **Communications** menu in the navigation sidebar, and select **Email Template Gallery**.
2. From the **Email Template Gallery**, locate your desired email template and click **Select**.
3. Select the **Set as my global default template** checkbox.

Set as my global default template. [What's this?](#)

Best practices with Broker Briefcase® and other Zywave tools

Make life a little easier by taking advantage of Zywave tool integration features. To learn if another tool you own integrates with Broker Briefcase®, take a look at the following best practices!

Account Management Center and Broker Briefcase®

Populating Account Management Center with your clients' information integrates seamlessly with Broker Briefcase®, allowing you to use your Zywave tools to their full potential. Bring valuable content to the forefront with Broker Briefcase®—start by grouping accounts and contacts from Account Management Center into **Lists**, and then deliver value with one-off distributions or marketing campaigns.

Note: If you own BrokerageBuilder™, it can be used in place of Account Management Center. For more information look to **BrokerageBuilder™ Help**, or contact Partner Support at 866.499.9283.

For more information on Account Management Center and Broker Briefcase®, see *Account Management Center and Broker Briefcase® Best Practices* in **Account Management Center Help**.

Glossary

Action Items

Action Items is a holding place or shopping cart for content. You can store and group content before distribution in your Action Items; for example, if you'd like to distribute multiple resources at one time, you can find a resource, add it to your Action Items, and continue searching and queuing up to 60 resources. Then, from the Action Items tab, use the same streamlined distribution process you see when distributing a single resource.

Advanced users

Users who can read CSS and HTML source code.

Classic email template editor

The Classic email template editor is where you have the option to edit or create email templates with CSS and HTML source code. This is recommended for advanced users with CSS and HTML coding experience.

Content group

Content groups provide a way to group a set of related content and distribute it over a given period of time.

CSS

A style sheet language used for describing the look and formatting of a document written in a markup language.

Custom content or template

Custom content or templates are created by administrative users at your agency.

HTML

Hypertext Markup Language (HTML) is a standardized system for tagging text files to achieve font, color, graphic, and hyperlink effects on World Wide Web pages.

Keyword tags

Keyword tags are keywords that Zywave experts tag content with to make it easier for you to find; for example, if Zywave tagged content with the keyword "Broker," then when you search Broker all the content containing that keyword tag would show up in your search results.

Merge fields

Merge fields are placeholders found in a Broker Briefcase content or email templates. During the distribution process, these fields are filled in with your agency and client data from the Broker Briefcase database, or from data you enter manually. When in a resource, merge fields are surrounded by square brackets; for example, [b_address] refers to your broker address. During the distribution process, this field is filled in with your agency's address, such as "123 Main St." There are a number of built-in merge fields that come with Broker Briefcase. Additionally, you can create your own custom merge fields.