SimplyCast

Powering Automation, Igniting Growth for Smarter Connections

SimplyCast 360

Automation Flow Editor Blueprints User Guide

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Overview

SimplyCast 360 allows organizations to easily map out and automate communication processes to make day-to-day communications, marketing efforts, and internal processes more efficient. SimplyCast 360 is a tool that brings all the main SimplyCast communication channels (email, SMS, voice, fax, and more) into one standard interface where they can be integrated into a campaign and deployed automatically with all the platform's other marketing and communication tools.

With SimplyCast 360, you can use a variety of drag-and-drop elements to create extensive campaigns, as well as rules and decisions to determine which messages are sent to whom and when exactly they are sent. Once you have a campaign structure with all the required elements and decisions, you can create and customize content for each message.

Automation Flow Editor Overview

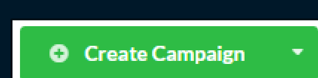
The SimplyCast 360 Automation Flow Editor allows you to create and customize your new automated campaign, however you like, using the drag-and-drop interface to bring in many different elements and rules. You will be redirected to the Automation Flow Editor once you create a new SimplyCast 360 campaign. Before launching a new campaign, there are two terms you will need to know moving forward:

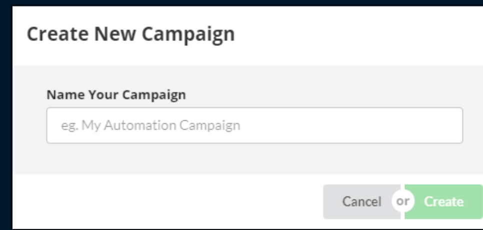
- **Element:** An element is one of the various tools or communication channels that users can drag and drop onto the canvas and configure as part of a SimplyCast 360 campaign.
- **Connection:** A connection is a rule or condition that tells an element how a contact should interact with it when they pass through the campaign. Connections appear as boxes on the line connecting two elements.

[**Note:** Refer to the *SimplyCast 360 Glossary Guide* for more key terms and definitions.]

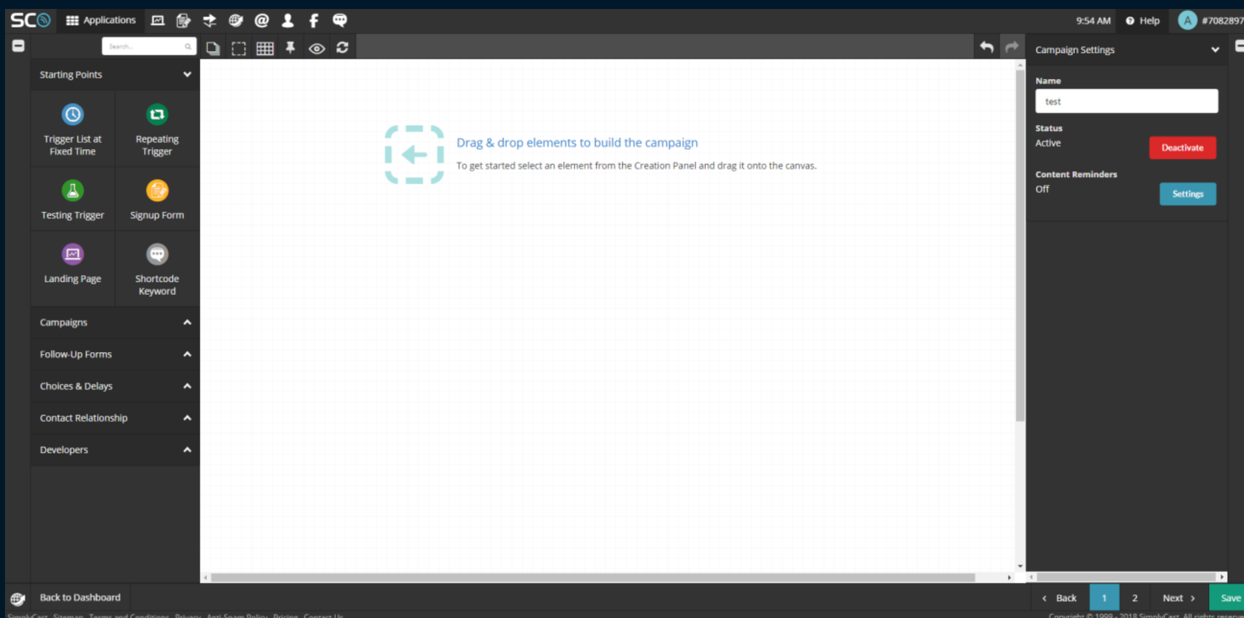
To access the SimplyCast Automation Flow Editor:

1. From the SimplyCast 360 Dashboard, click the green Create Campaign button.

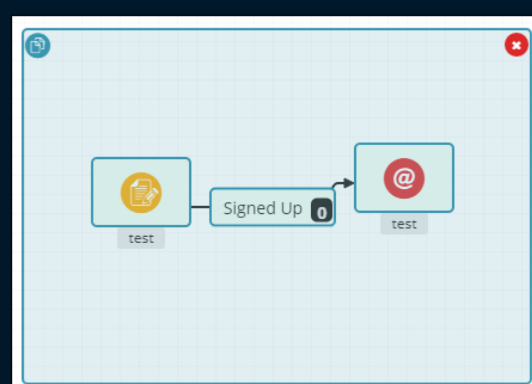




2. A pop-up will appear where you will be asked to name the campaign. Type the name into the textbox provided.
3. Click the green Create button to create the campaign, close the sidebar, and be redirected to the Automation Flow Editor.
    3.1. Or click Cancel to close the pop-up without creating a campaign.



The Automation Flow Editor is divided into four main sections: the settings panel, the creation panel, the navigation bar, and the canvas.

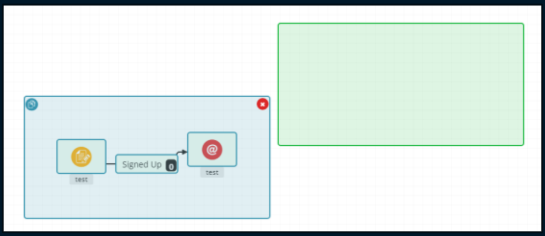


The canvas is the middle portion of the Automation Flow Editor and is the space in which you select, position, and connect elements together in your campaign. Using the drag-and-drop interface, add elements, widgets (such as notes and sections), and connections to your campaign and reposition them around the screen to organize them to your liking. You are also able to highlight a section on the canvas containing multiple elements.

To do this:

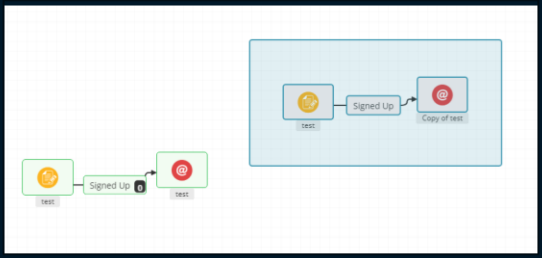
1. Click and hold the mouse down on a blank section of the canvas and drag the mouse to create a blue box.
2. Drag the mouse until the blue box covers all the elements you want highlighted, then release the mouse.

When you hover your mouse over a highlighted section of the canvas, you will see two new icons appear in the top corners of the blue box. On the left is a Copy All Selected icon, which allows you to create a second copy of the highlighted section in the canvas.

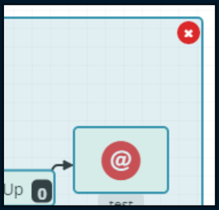


To do this:

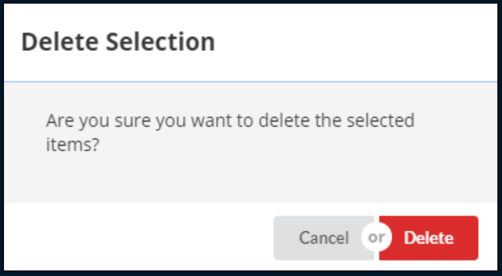
1. Press the mouse down on the Copy All Selected icon and drag it to another spot on the canvas. An empty green box will appear when you drag the mouse.
2. Drop the green box anywhere on the canvas, and it will turn blue and become populated with the elements and connections you copied.



3. Upon doing this, the section you initially highlighted will be deselected, and the copied version will be selected instead. The element names in the copied section will be a “Copy of” whatever you named the original element.

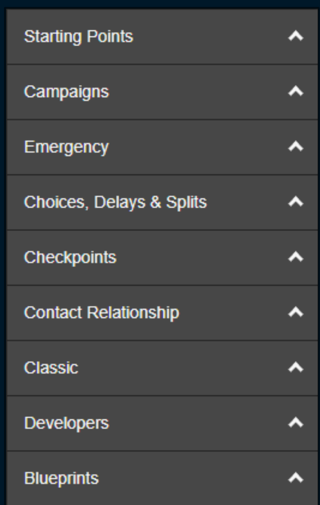


4. The red “X” icon on the top right corner is used to delete the highlighted section of your campaign. When you hover your mouse over the highlighted section, this red “x” icon will appear. Click the icon, and a pop-up will appear asking you to confirm your deletion. Click the red Delete button to confirm the deletion and close the pop-up or click Cancel to close the pop-up without deleting the selection.



The last thing you can do with highlighted sections is move them around the canvas; this simultaneously moves all the highlighted elements, widgets, and connections as a block. To do this, click and hold the mouse down anywhere inside the highlighted section, and drag and drop the section around the canvas as desired.

Creation Panel



The Creation Panel is on the left side of the screen and contains all the SimplyCast 360 elements that can be dragged and dropped into the canvas, sorted into multiple tabs.

To add a SimplyCast 360 element to your campaign, either drag and drop the icon into the canvas or double-click the icon. There are nine different tabs of elements you can choose from.

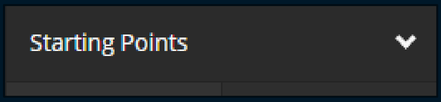
These are:

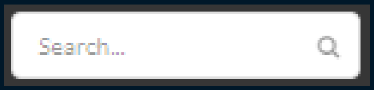
1. **Starting Points:** These elements can be used as a jumping-off point in creating the SimplyCast 360 campaign.
2. **Campaigns:** These elements are the different types of messages that can be sent to project contacts and can be set up and customized in their respective editors.
3. **Emergency:** These elements are part of SimplyCast's emergency suite of tools, which can send out notifications quickly and efficiently in an emergency.
4. **Choices, Delays & Splits:** These elements can be used to create rules to determine when the next part of the SimplyCast 360 campaign will interact with contacts, which contacts it will interact with, and how they will interact.
5. **Checkpoints:** These elements allow you to create and trigger checkpoints at specific points in the campaign where contacts can return if actions are taken/not taken.
6. **Contact Relationship:** These elements allow the system to perform actions within the CRM. These could include updating a contact profile and waiting on a CRM task.
7. **Classic:** These elements are older versions of current elements still supported in the SimplyCast application.

8. **Developers:** These elements can bring information, such as contact data, into the system from an external source or push this data out from the system to an external source.
9. **Blueprints:** These elements incorporate blueprint instances into your campaign. See the SimplyCast Blueprint Core User Guide and its associated documents for more information.

[**Note:** This User Guide only covers Starting Points. Please see other guides for different Elements.]

To open a tab in the Creation Panel, click on the tab name you want to open. The tab will expand to display the elements within that tab. To close the tab, click the tab name again.

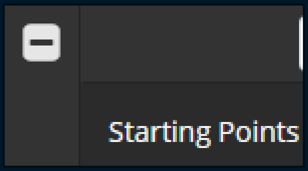




Search for a specific element using the search bar above the Creation Panel. This saves you from opening multiple tabs until you find the element needed. Enter your search query into the search bar and the elements displayed will begin to filter.

Once you find the element you're looking for, either double-click or drag-and-drop it into the canvas to add it to your campaign or double-click to add it to the canvas.

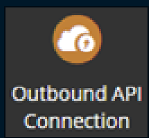
[**Note:** Elements that are unavailable to you for whatever reason will be grayed out, and you cannot select them. If an element is unavailable due to insufficient subscription, double click the unavailable element to be redirected to your Account Subscription page where you can purchase more credits, or a different subscription, as required.]



In the top left corner of the Creation Panel, there is a gray "-" button. To hide the Creation Panel and expand the Canvas, click this "-" button. Once the Creation Panel is hidden, the "-" button will turn into a "+" sign. When the Creation Panel is hidden, click the "+" sign to re-expand it.

Blueprints

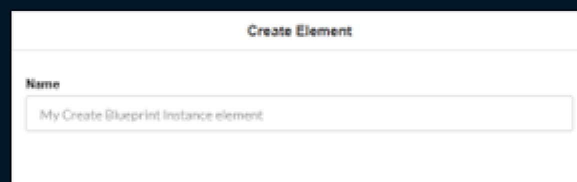
Create Blueprint Instance

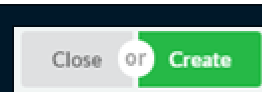


Create Blueprint Instance creates a new entry for a specified Blueprint entity, allowing you to track key information about that entity as it changes and measure its frequency of change. For now, this element interacts with the form to track changes to an entity related to the form being filled out.

To begin setting up this element:

1. Click and drag the Create Blueprint Instance element or double-click to add it to the canvas.
2. When you place the element, a drawer will open and request that you name your new element. Click the green Create button to create the new element or click the gray Close button to close the sidebar without creating the new element.





3. Once you have placed the element onto the canvas and have it selected with your mouse, four additional fields will appear in the Settings Panel on the right-hand side of your screen:
   - 3.1. **Name:** This field contains the name you selected when you added the element to the canvas.
   - 3.2. **Status:** This field is where you can activate or deactivate the element by clicking the blue or red button respectively. Activating an element means that the element will be able to be used as part of the campaign and should perform as expected.
   - 3.3. **Blueprint Entity:** This dropdown menu determines which Blueprint Entity your Create Blueprint Instance element is connected to.
   - 3.4. **Created Instance Owner:** This dropdown menu allows you to assign control of the created instance to a specific user on the account.

4. **Pipeline Filter & Advancement:** Choose whether you would like contacts to progress through any pipelines you may have associated with the campaign. In the dropdown menu in this field, choose the pipeline you would like contacts to be added to. A second dropdown will appear to choose the stage of that pipeline contacts will be added to at this point of the campaign. If you choose to set a pipeline stage to this element, an icon will appear on the bottom left corner of the element in your campaign to indicate that contacts will move through a pipeline stage at this point in your campaign.

Create Blueprint Instance Considerations

Create Blueprint Instance creates an instance on an entity using specific data from certain elements. At the time of writing, this element can create an instance using data from a form submission, form publication or a blueprint trigger activation. Therefore, it is important to understand that you need to have a constructed form or blueprint entity before setting it up. To do this, please see the SimplyCast Form User Guide or the SimplyCast Blueprint Core User Guide. You will also likely want to refer to the SimplyCast Blueprint Trigger User Guide for added information on setting up triggers, if that is how you intend to activate the Create Blueprint Instance element.

Once the element is on your workspace, you will see the following settings:

1. Blueprint Entity: This dropdown allows you to select the entity you wish to create instances on.

2. Created Instance Owner: This dropdown allows you to set the instance's owner, which is useful for organizational requirements and task assignment.

3. Instance Fields: Here you will find a blue button titled 'Configure Fields'. This allows you to determine what information you want to pull from the trigger activation or form submission or publication. This information will be determined by the information on your forms, and not all fields will be accessible. It is also important to note that conflicts may arise if the CRM fields on a form and the blueprint data fields on an entity have the same names.

    3.1. For example,

3.1.1. Pipeline Filter & Advancement: This dropdown appears on every element, and allows you to progress data through a pipeline as it reaches the selected stage in the workflow.

For Example: A form can be connected to a Decision element, and then a Create Blueprint Instance element. In this way, a new blueprint instance will be created only when the decision element conditions are met. This way, your blueprint element will only have instances that match a specific set of criteria. See the image below for an example: