SimplyCast

Powering Automation, Igniting Growth for Smarter Connections

SimplyCast 360

Automation Flow Editor Creation Choices, Delays & Splits User Guide

Contents

Overview

SimplyCast 360 enables organizations to easily map and automate communication processes, making 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 a single, standardized interface, where they can be integrated into a campaign and deployed automatically alongside 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

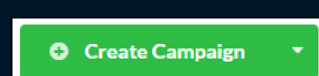
The SimplyCast 360 Automation Flow Editor lets you create and customize your new automated campaign however you like, using the drag-and-drop interface to bring in many different elements and rules. You will be redirected to the Automation Flow Editor once you create a new SimplyCast 360 campaign. Before 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.

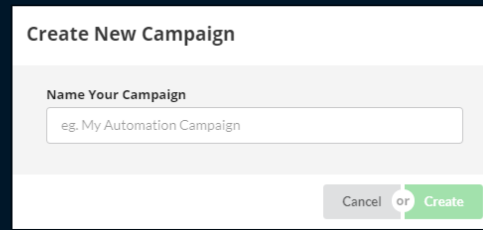
[**Note:** Refer to the *SimplyCast 360 Glossary Guide* for more key terms and definitions.]

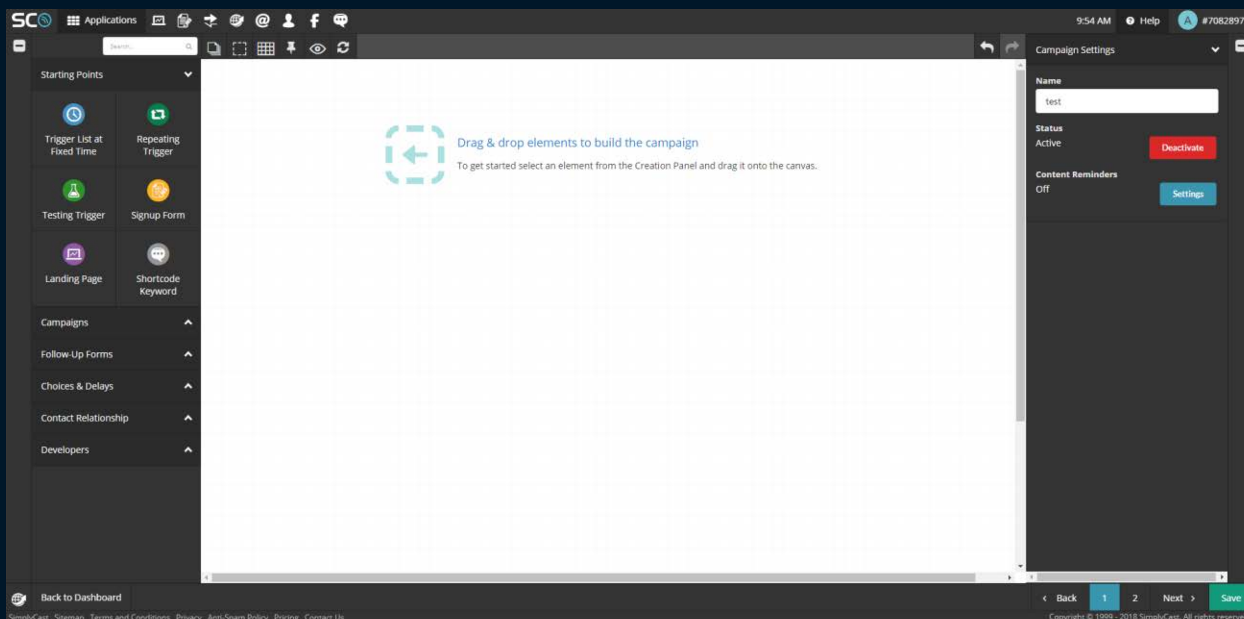
To access the SimplyCast Automation Flow Editor:

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.

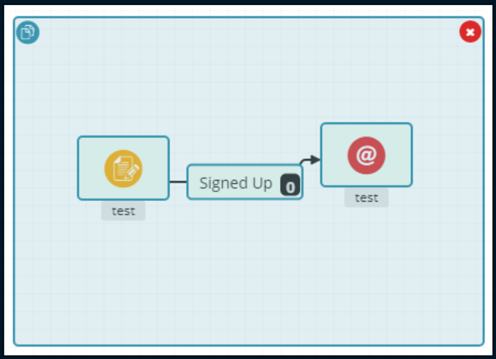




The Automation Flow Editor is divided into four main sections: the settings panel, the creation panel, the navigation bar, and the canvas.

The canvas is the middle portion of the Automation Flow Editor, where you select, position, and connect elements 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.

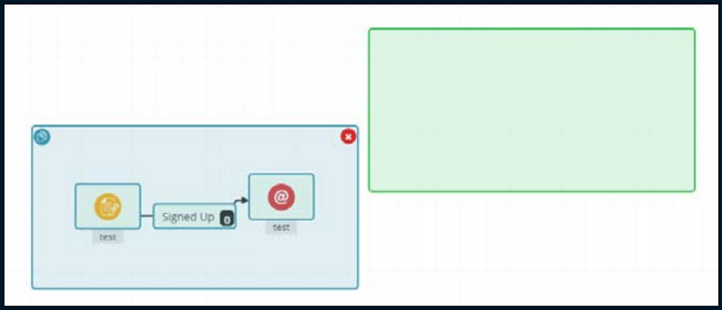
You can also highlight a section on the canvas containing multiple elements.



To do this:

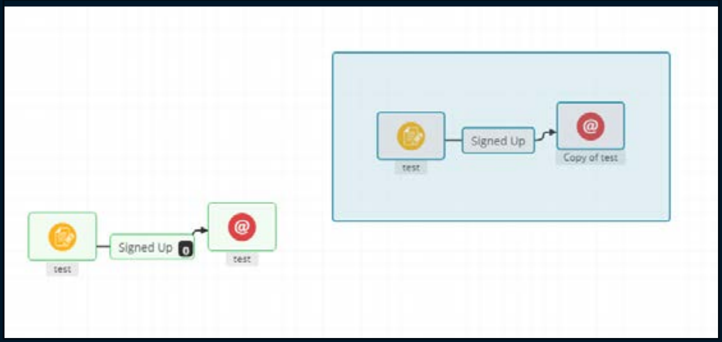
1. Click and hold the mouse down on a blank section of the canvas and drag the mouse to create a blue box.
2. Drag the mouse until the blue box covers all the elements you want to highlight, then release the mouse.

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 that lets you create a second copy of the highlighted section in the canvas.



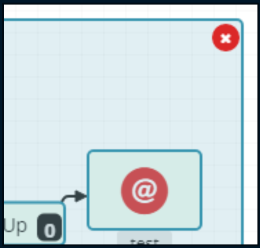
To do this:

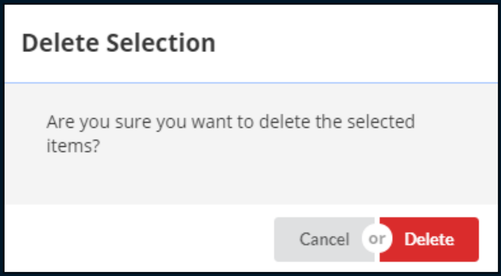
1. Press the mouse down on the Copy All Selected icon and drag it to another spot on the canvas. An empty green box will appear when you drag the mouse.
2. Drop the green box anywhere on the canvas, and it will turn blue and become populated with the elements and connections you copied.



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.

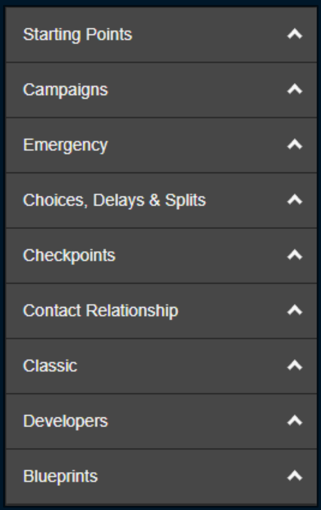
4. The red "X" icon on the top right corner is used to delete the highlighted section of your campaign. When you hover your mouse over the highlighted section, this red "x" icon will appear. Click the icon, and a pop-up will appear asking you to confirm your deletion. Click the red Delete button to confirm 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 anywhere inside the highlighted section, then drag and drop it 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 onto the canvas or double-click it. There are nine different tabs of elements you can choose from.

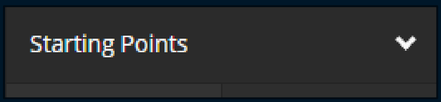
These are:

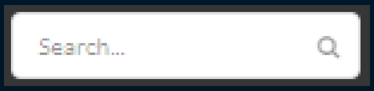
1. **Starting Points:** These elements can be used as a jumping-off point in creating the SimplyCast 360 campaign.

2. **Campaigns:** These elements are the different types of messages that can be sent to project contacts and can be set up and customized by 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 be returned 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 Campaigns. 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 its contents. To close the tab, click the tab name again.



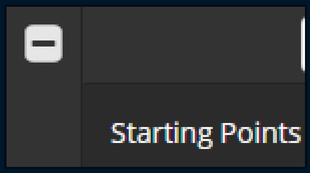


Search for a specific element using the search bar above the Creation Panel. This saves you from opening multiple tabs while you search for the element you need. Enter your search query into the search bar, and the elements displayed will begin to filter.

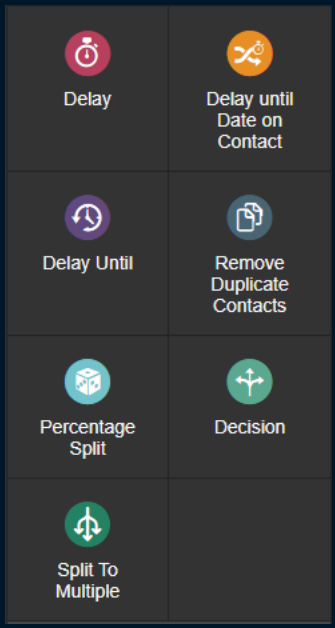
Once you find the element you're looking for, either double-click or drag-and-drop it into the canvas to add it to your campaign or double-click to add it to the canvas.

[**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 expand it again.



Choices, Delays & Splits



The next tab in the Creation Panel on the left side of the screen is the Choices & Delays tab. The elements appearing in this tab are different types of actions that can pause contacts from continuing through the campaign or can help determine which path contacts should follow based on specified criteria.

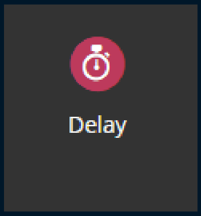
These elements are:

1. **Delay:** This element allows you to pause a contact in the SimplyCast 360 campaign for a specific period of time before it resumes automatically.

2. **Delay Until Date on Contact:** This element allows you to send contacts through the campaign at a pre-specified date that is unique to each contact.

3. **Delay Until:** This element allows you to pause a contact in the SimplyCast 360 campaign until a specific date is reached, then it will resume automatically.
4. **Remove Duplicate Contacts:** This element allows you to prevent any contacts from proceeding any further in the campaign if they have already passed through.
5. **Percentage Split:** This element allows you to send different messages to different contacts within a list based on percentages.
6. **Decision:** This element allows you to create multiple options to help determine which path a contact will continue down in your campaign, depending on whether they meet specific criteria when interacting with the previous elements.
7. **Split to Multiple:** Based on pre-set criteria, split contacts between multiple options. This is most useful when needing to differentiate which messages are received based on user input.

Delay

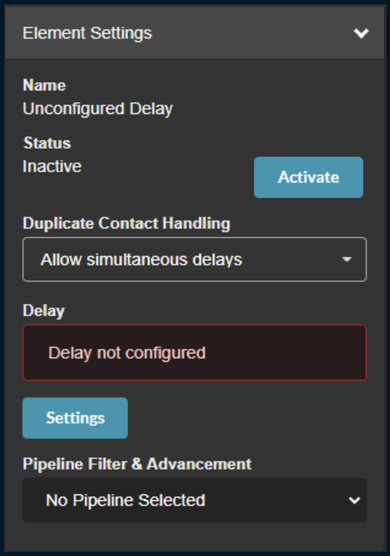


The first drag-and-drop element in the Choices, Delays & Splits tab is the Delay element. This element allows you to pause a contact in the SimplyCast 360 campaign for a specified period before it resumes automatically.

To begin setting up this element:

1. Click and drag the Delay element or double-click it to add it to the canvas.

2. 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:



   2.1. **Name:** By default, this field will say “Unconfigured Delay” until the delay is configured. The delay name will automatically update to match the time selected in the Delay field below.

   2.2. **Status:** This field is where you can activate or deactivate the element by clicking the blue or red button, respectively. Activating an element means it can be used in the campaign and should perform as expected.

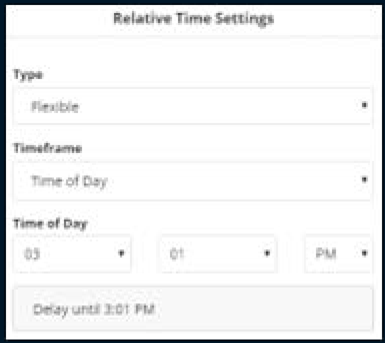
[**Note:** Keep in mind the element will not become active until you save the campaign.]

   2.3. **Duplicate Contact Handling:** This dropdown menu allows you to determine how to handle duplicate contacts. By default, this is set to “Allow simultaneous delays,” which delays each duplicate by the specified amount of time. The other available options are “Update to most recent delay,” which resets the delay to the most recent version of the contact, and “Use existing delay,” which uses the delay at the time it was triggered and ignores duplicate entries.

   2.4. **Delay:** This field contains two sections. The first section is a text box that describes the length of the chosen delay. By default, this textbox will say “Delay Not Configured.” The second section is a blue Settings button where you can configure how long the system will pause the campaign before advancing to the next element. Clicking this button will open the Relative Time Settings sidebar, where you can choose the type of delay from the Type dropdown: Fixed Offset or Flexible.

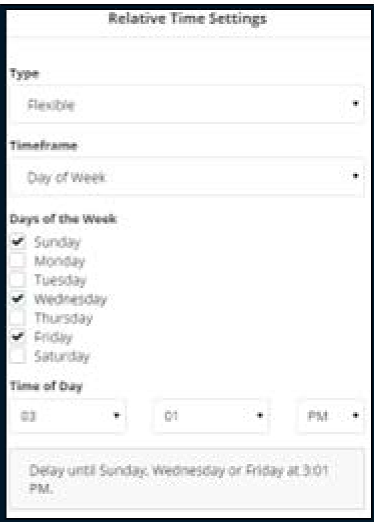
      2.4.1. Fixed offset means that the delay will be a fixed amount of time before the contacts will continue their progress in the campaign. Choosing Fixed Offset as your delay type will cause the Offset field to appear. This field includes two dropdowns and a textbox. Choose your unit of time from the dropdown on the right (minutes, hours, days, weeks, or months), and in the dropdown on the left, choose the number of the selected time unit. The textbox beneath the dropdowns will describe the time delay you configured. For example, if you choose “Days” in the dropdown on the right and “1” on the left, the textbox will indicate that the delay will last 1 day.

2.4.2. A flexible delay means the delay can be set to customized lengths of time, rather than a specific, fixed time.



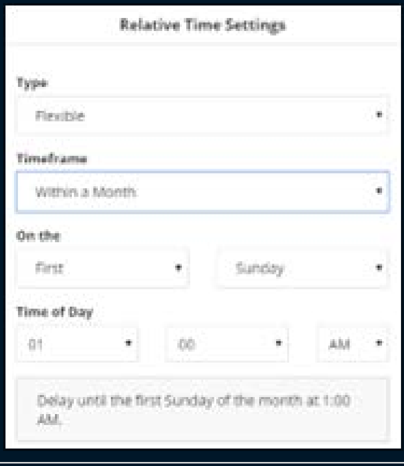
2.4.2.1. Choosing Flexible as your delay type displays a Timeframe dropdown field in the sidebar.

2.4.2.2. From this dropdown, choose whether you want the delay to end at a specific time of day, on a day of the week, or sometime within a month. Selecting the Time of Day option means the delay will end at a selected time within the next 24 hours.



2.4.2.3. Choose the time the delay will last from the dropdown menu options in the Time of Day field set. Selecting the Day of Week option will cause a Days of the Week field to appear, where you must select the day(s) of the week option(s) you wish the delay to last until.

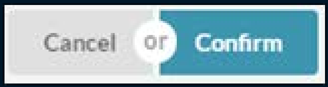
2.4.2.4. Choose the day(s) when the delay can end by checking them off. Then select the time of day the delay will end by selecting the time from the dropdown menus available in the Time of Day field set. Selecting the Within a Month option will cause an “On the” field set to appear. Here, choose the week of the month you wish the delay to last until in



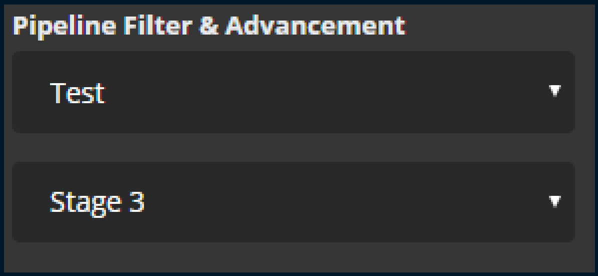
the first field, and in the second field select the day of the week. Choose the time of day the delay will end from the dropdown menus available. The textbox below will describe the delay interval configured for all flexible delay type options.

[**Note:** For example, say you selected the Day of Week option in the Timeframe dropdown Menu and chose Sunday, Wednesday, and Friday at 3:01 PM in their respective fields. The textbox below the fields will indicate the delay will be in place in the campaign until Sunday, Wednesday or Friday at 3:01 PM.]

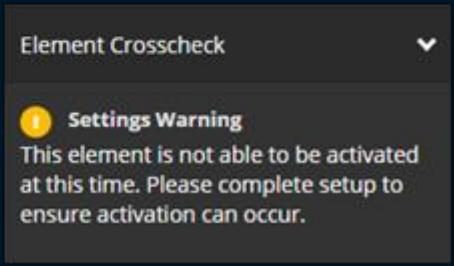
2.4.3. Once you have determined your delay type and have selected the timeframe to use with your Delay element, click the blue Confirm button at the bottom of the sidebar to save your settings and close the sidebar, or click the Cancel button to close the sidebar without configuring your delay settings.



3. **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 for this field, choose the pipeline you would like contacts added to. A second dropdown will appear to choose the stage of the pipeline that 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 in 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.



4. If there is an issue with the element that needs to be resolved before the element can be activated, there will be a yellow or red exclamation point symbol in the top right corner of the element to signify this. If this is the case, when you select the element with your mouse, an additional section called Element Crosscheck will appear in the Settings Panel. The Element

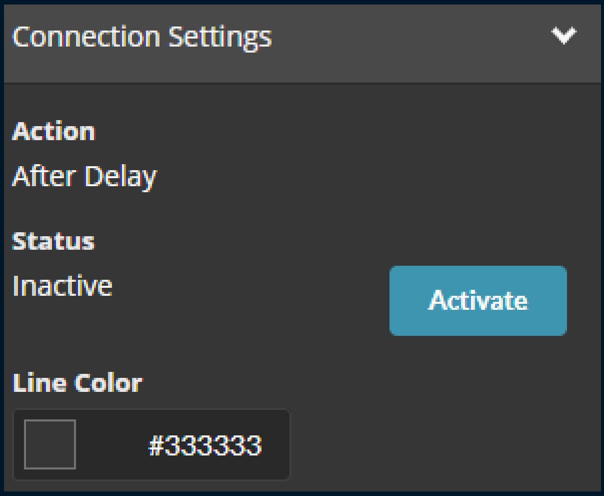


Crosscheck section will describe the issue with the element and provide instructions for resolving it.

4.1. To connect your Delay element to another element in your campaign, click the black target icon located on the top corner of the element and drag it over the element you wish to connect it to.

[**Note:** Some elements cannot be connected to each other. For example, you cannot connect two Starting Point elements to each other, and you cannot connect a Starting Point element to the Contact Changed, Start from CRM, or Inbound API elements.]

5. Once a connection has been established between the Delay element and at least one other element, a textbox with the connection type will appear on the line. Click on this textbox to open a new Connection Settings section in the Settings Panel.



6. There are four fields in the Connection Settings section:

6.1. The first field is the Action field, which indicates the connection type (After Delay).

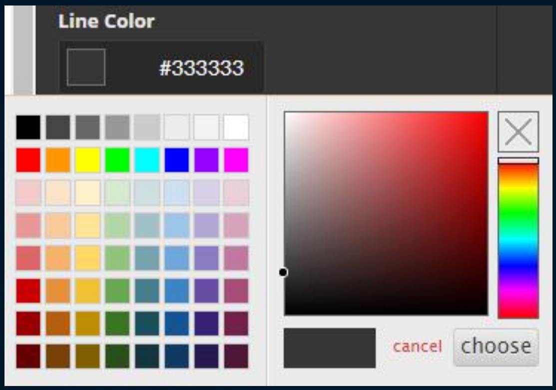
6.2. The second field is the Description field, which will display a short description when the connection is triggered.

6.3. The next field is the Status field, where you can activate or deactivate the connection by clicking the red or blue button, respectively. Activating a connection means it can be used in the campaign and should perform as expected.

[**Note:** Keep in mind the connection will not become active until you save the campaign.]

6.4. The last field is the Line Color field where you can choose the color for that connection's line.

6.5. **To choose a color:**

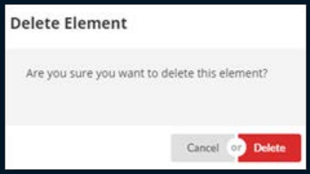


6.5.1. Click on the color square in the field and a color selector will appear or enter the hex code of the color in the field next to the square.

6.5.2. Choose your desired color from the pre-set swatches on the left side of the selector dropdown or use the right side to manually choose a color.

6.5.3. Click the Choose button at the bottom right side of the color selector to lock in your color or click Cancel to close the selector dropdown without picking a color.

6.6. To copy a connection, hover your mouse over the textbox appearing on the connection to show a blue button at the top left of the textbox. Copying a connection saves you from having to re-configure the settings for any additional connections requiring the same conditions, saving time. Click and drag this button to create a new connection that can be attached to a new element. All connection settings configured in the initial connection will be copied over to the new connection.

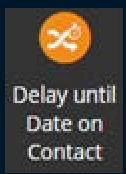


6.7. Delete a connection by hovering over the connection's textbox and clicking the red "X" button.

6.8. To delete the element from the campaign, hover your mouse over the element and click the red "X" button in the top right corner that appears. A pop-up window will appear asking you to confirm the deletion. Click the red Delete button to complete the deletion or Cancel to close the window without deleting the element.

[**Note:** You will only receive the confirmation pop-up if the element has been activated or if the campaign has been saved.]

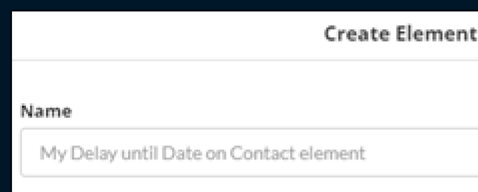
Delay Until Date on Contact



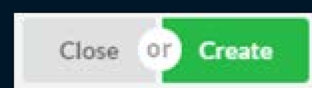
The second drag-and-drop element in the Choices & Delays tab is the Delay Until Date on Contact Element. This element allows you to send contacts through the campaign at a pre-specified time, unique to each contact.

To begin setting up this element:

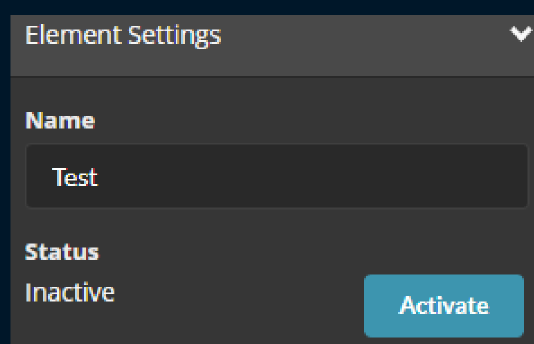
1. Click and drag the Delay Until Date on the Contact element or double-click it to add it to the canvas.
2. When you place the element, a sidebar will appear with a Name field that will ask you to enter a name for the new element. Type the name into the textbox provided.



3. Click the green create button to add the element and close the sidebar or click the gray Close button to close the sidebar without adding the element.



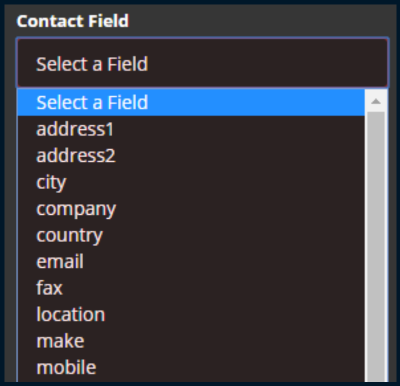
4. Once you have placed the element onto the canvas and have it selected with your mouse, six additional fields will appear in the Element Settings section on the right-hand side of your screen:
   4.1. **Name:** This field contains the name you selected when you added the element to the canvas. To change the name of your element, edit the name in the textbox provided.



   4.2. **Status:** This field is where you can activate or deactivate the element by clicking the blue or red button, respectively. Activating a connection means it can be used in the campaign and should perform as expected.

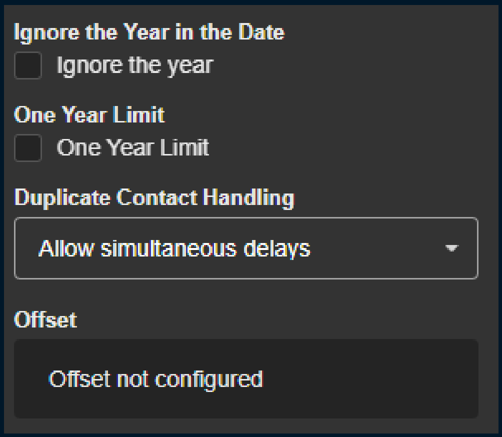
[**Note:** Keep in mind the element will not become active until you save the campaign.]

4.2.1. **Contact Field:** This field lets you choose which CRM field the element will pull a date from. Select the desired field from the dropdown menu provided. This list will include all available CRM fields, including any custom fields you created.



[**Note:** It is recommended you use the Date field with this element. This field differs from the Date/Time field in the sense that the Date/Time field requires that the information in the contact profile matches both a specified date and time, whereas the Date field only looks at a specified date.]

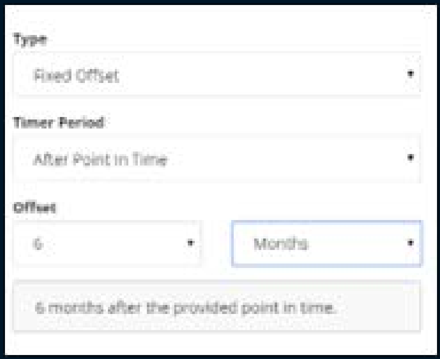
4.3. **Ignore the Year in the Date:** By default, the system will not ignore the year in the selected date, meaning the element could potentially be triggered annually on the same date. If you would like to make sure the year is included to trigger the element only once, click the "Ignore the Year" checkbox in the Settings Panel.



4.4. **One-Year Limit:** Checking this box will impose a one-year limit on the dates that apply to this element – the system will ignore any dates that are over a year past the current date. This checkbox will only appear if the "Ignore the Year" checkbox is not selected.

4.5. **Duplicate Contact Handling:** This dropdown menu allows you to determine how to handle duplicate contacts. By default, this is set to "Allow simultaneous delays," which delays each duplicate by the specified amount of time. The other available options are "Update to most recent delay", which will update the delay based on the most recent version of the contact, or "Use existing delay," which will use the delay at the time the delay was triggered, regardless of the duplication.

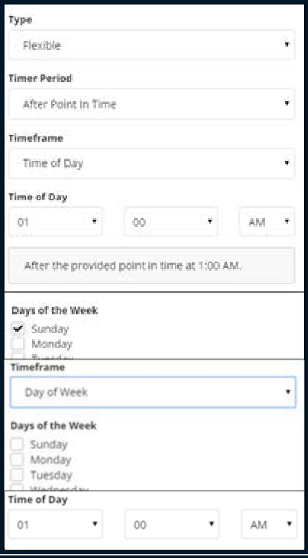
4.6. **Offset:** This field contains a blue Settings button that you can use to determine when the contact will progress in the campaign after the date specified in their profile. Clicking this button opens a sidebar where you must choose when the offset occurs. Select a type of offset to use from the Type dropdown: Fixed Offset or Flexible.



4.6.1. Choosing Fixed Offset as your offset type will cause the Timer Period and Offset fields to appear. The Timer Period field refers to whether the offset will occur before or after the point in time selected from the contact's CRM field. Select one option from the dropdown.

4.6.1.1. The Offset field includes two dropdowns and a textbox. Choose a unit of time from the dropdown on the right (hours, days, weeks, or months), and in the dropdown on the left, choose the number of the selected time unit you would like the offset from the selected date. The textbox beneath the dropdowns will describe the offset interval you configured.

[**Note:** For example, if you selected "After Point in Time" in the Timer Period field, and then select "6" and "Months" in the Offset field, the textbox will explain that the contact will progress to the next step in the campaign six months after the date specified in their profile.]



4.6.2. Choosing Flexible as your schedule type causes the Timer Period, Timeframe, and Time of Day fields to appear. The Timer Period field refers to whether the offset will occur before or after the point in time selected from the contact's CRM field. Select one option from the dropdown.

4.6.2.1. The Timeframe field refers to whether the offset will occur at a specific time of day, on a specific day of the week, or on a specific day in the month. Selecting the Time of Day option means the contact will progress to the next step in the campaign within 24 hours of the specified date in their profile. Choose the desired time from the dropdown menu in the Time of Day field set.

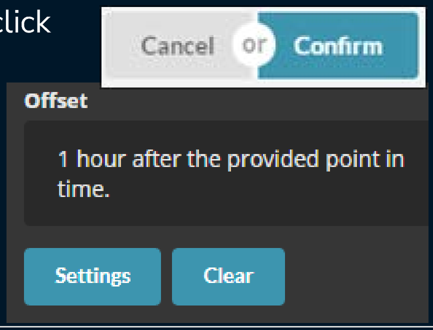
4.6.2.2. Selecting the Day of Week option will cause an additional Days of the Week section to occur, where you must select one or multiple days of the week (Sunday through Saturday) for the offset to occur. This means contacts will progress to the next step of the campaign on the closest selected day following the date specified in their profile (even if it is the same day).

4.6.2.3. Choose the day(s) when the offset can occur by checking them off. Then select the time of day the offset will occur from the dropdown menus in the Time of Day field set. Choosing the Within a Month option means that contacts can be made to progress to the next stage of the campaign at a specific time each month. Selecting this option will cause an additional “On the” field set to appear with two dropdown menus.

4.6.2.4. The first dropdown lets you choose the week of the month when you want the contact to progress to the next step of the campaign, and the second dropdown lets you choose a specific day within that week. Then, choose the time of day from the provided Time of Day dropdown menus. The textbox below these options will describe the delay interval configured for all flexible delay type options.

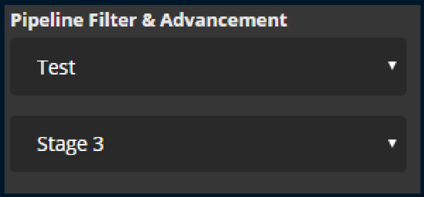
[**Note:** For example, say you selected After Point in Time offset type, the Day of Week option in the Timeframe dropdown menu, and chose Sunday, Wednesday, and Friday at 1:00 PM in their respective fields. The textbox below the fields will indicate that the contact will proceed to the next step in the campaign on the next Sunday, Wednesday, or Friday at 1:00 PM after the provided point in time.]

4.6.3. Once you have determined the offset time, click the blue Confirm button to save your settings and close the sidebar, or click the Cancel button to close the window without configuring your offset. The offset time will be displayed in the Offset section in the

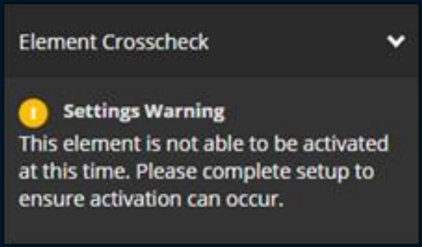


Settings Panel, and a blue Clear button will appear beside the blue Settings button. Click Clear to remove the offset time configuration.

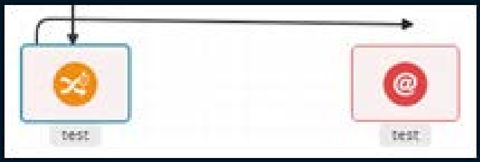
5. **Pipeline Filter & Advancement:** Choose whether you would like contacts to progress through any pipelines you may have associated with the campaign. In the dropdown menu for this field, choose the pipeline you would like contacts added to. A second dropdown will appear to select the pipeline stage to which contacts will be added at this point in the campaign. If you choose to set a pipeline stage to this element, an icon will appear in 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.



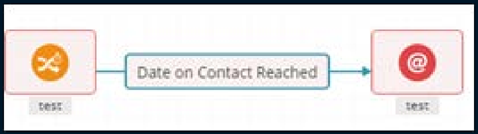
6. If there is an issue with the element that needs to be resolved before the element can be activated, there will be a yellow or red exclamation point symbol in the top right corner of the element to signify this. If this is the case, when you select the element with your mouse, an additional section called Element Crosscheck will appear in the Settings Panel. The Element Crosscheck section will describe the issue with the element and provide instructions for resolving it.

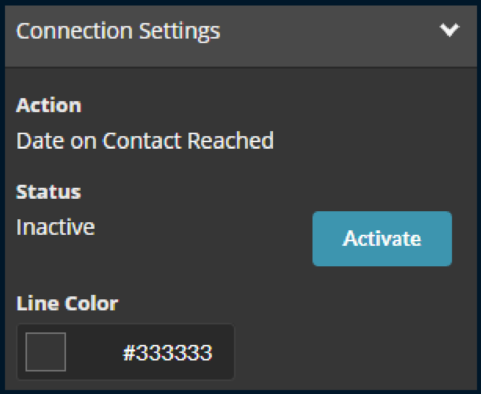


7. To connect your Delay Until Date on the Contact element to another element in your campaign, click the black target icon located in the top corner of the element and drag it over the element you wish to connect it to.



[**Note:** Some elements cannot be connected to each other. For example, you cannot connect two Starting Point elements to each other, and you cannot connect a Starting Point element to the Contact Changed, Start from CRM, or Inbound API elements.]

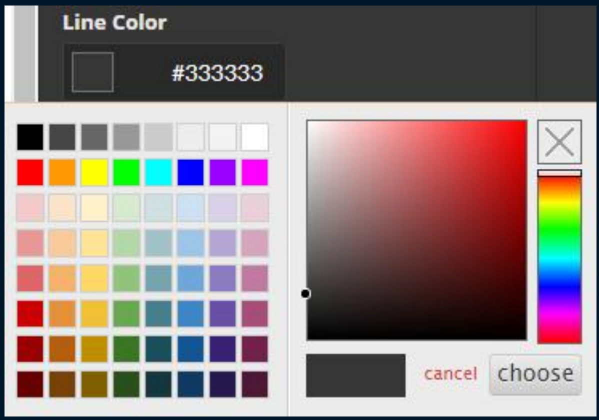




8. Once a connection has been established between the Delay Until Date on Contact element and at least one other element, a textbox with the connection type will appear on the line. Click on this textbox to open a new Connection Settings section in the Settings Panel.
9. There are four fields in the Connection Settings section:
   9.1. The first field is the Action field, which indicates the connection type (Date on Contact Reached).
   9.2. The second field is the Description field, which will display a short description of when the connection will be triggered.
   9.3. The next field is the Status field, where you can activate or deactivate the connection by clicking the blue or red button, respectively. Activating a connection means it can be used in the campaign and should perform as expected.

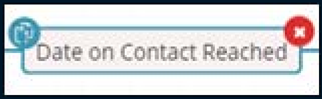
[**Note:** Keep in mind the connection will not become active until you save the campaign.]

10. The last field is the Line Colour field where you can choose the colour for that connection's line.
11. **To choose a colour:**
    11.1. Click on the colour square in the field, and a colour selector will appear, or enter the hex code of the colour in the field next to the square.
    11.2. Choose your desired colour from the pre-set swatches on the left side of the selector dropdown or use the right side to manually choose a colour.

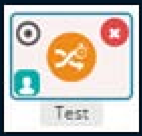


11.3. Click the Choose button at the bottom right side of the colour selector to lock in your colour or click Cancel to close the selector dropdown without picking a colour.

12. To copy a connection, hover your mouse over the textbox appearing on the connection to show a blue button at the top left of the textbox. Copying a connection saves you from having to reconfigure the settings for any additional connections requiring the same conditions, saving time.

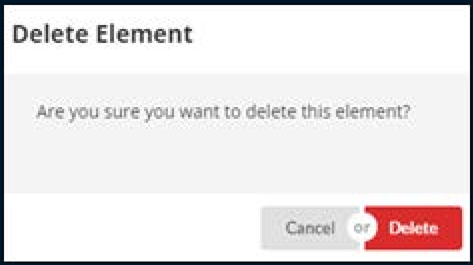


12.1. Click and drag this button to create a new connection that can be attached to a new element. All connection settings configured in the initial connection will be copied over to the new connection.



13. Delete a connection by hovering over the connection's textbox and clicking the red "X" button.

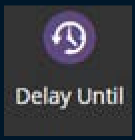
14. To delete the element from the campaign, hover your mouse over the element and click the red "X" button in the top right corner that appears. A pop-up window will appear asking you to confirm the deletion.



14.1. Click the red Delete button to complete the deletion or Cancel to close the window without deleting the element.

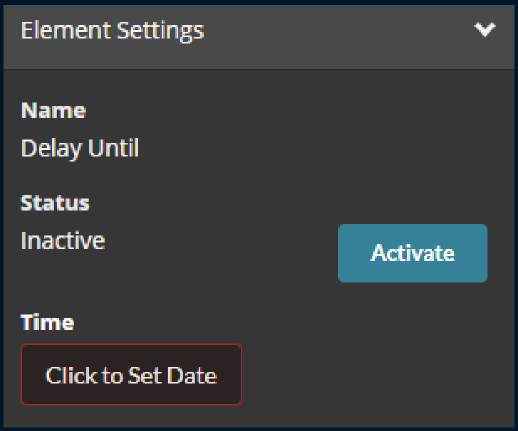
[**Note:** You will only receive the confirmation pop-up if the element has been activated or if the campaign has been saved.]

Delay Until

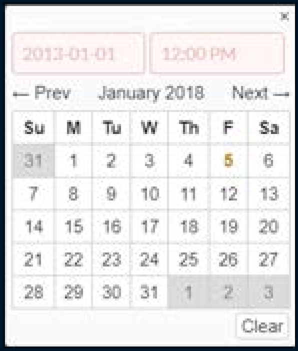


The third drag-and-drop element in the Choices & Delays tab is the Delay Until element. This element allows you to pause a contact in the 360 campaign until a specific date is reached, then it will resume automatically.

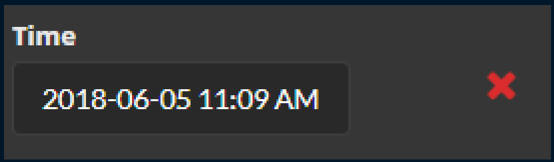
To begin setting up this element:



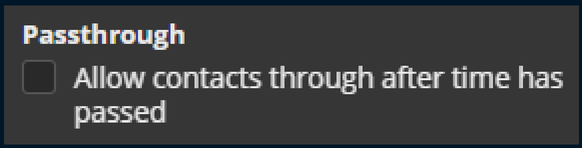
1. Click and drag the Delay Until element or double-click it to add it to the canvas.
2. Once you have placed the element onto the canvas and have it selected with your mouse, five additional fields will appear in the Element Settings section in the Settings Panel:
    2.1. **Name:** The name you selected when you added the element to the canvas.
    2.2. **Status:** Activate or deactivate the element by clicking the blue or red button, respectively. Activating an element means it can be used in the campaign and should perform as expected.



[**Note:** Keep in mind the element will not become active until you save the campaign.]

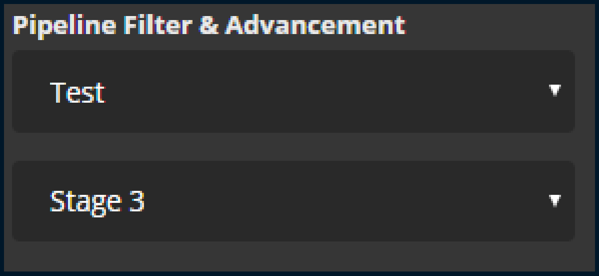


   2.3. **Time:** Choose the date and time the system will delay the campaign until. Click the textbox in this field, and a calendar dropdown will appear to select the date the campaign will be delayed. If the time is already set, click the textbox containing the set time to change it if desired. Click anywhere outside of the dropdown or the “X” button in the top right corner, or press the Enter button on your keyboard to close the calendar. To clear a set time, click the red “X” located to the right of the Time field.

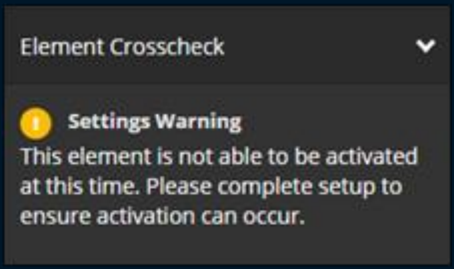


   2.4. **Passthrough:** This field contains a checkbox that you can click if you would like the system to ignore this element if the set date has already passed and proceed through the campaign without delay.

2.5. **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 for this field, choose the pipeline you would like contacts added to. A second dropdown will appear to select the pipeline stage to which contacts will be added at this point in the campaign. If you choose to set a pipeline stage to this element, an icon will appear in 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.

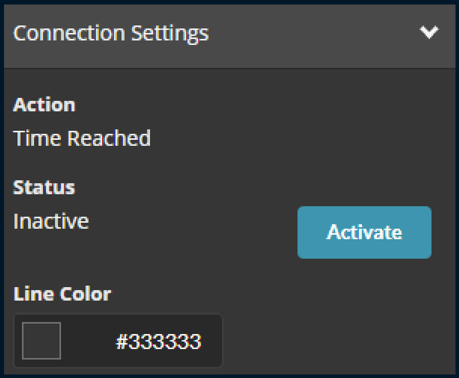


3. If there is an issue with the element that needs to be resolved before the element can be activated, there will be a yellow or red exclamation point symbol in the top right corner of the element to signify this. If this is the case, when you select the element with your mouse, an additional section called Element Crosscheck will appear in the Settings Panel. The Element Crosscheck section will describe the issue with the element and provide instructions for resolving it.



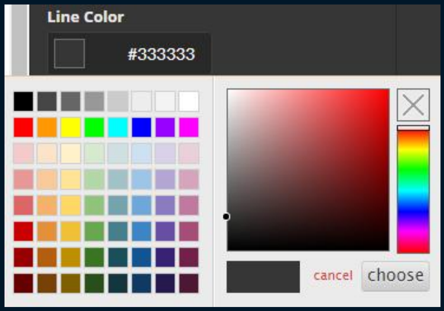
4. To connect your Delay Until element to another element in your campaign, click the black target icon located on the top corner of the element and drag it over the element you wish to connect it to.

[**Note:** Some elements cannot be connected to each other. For example, you cannot connect two Starting Point elements to each other, and you cannot connect a Starting Point element to the Contact Changed, Start from CRM, or Inbound API elements.]



5. Once a connection has been established between the Delay Until element and at least one other element, a textbox with the connection type will appear on the line. Click on this textbox to open a new Connection Settings section in the Settings Panel.
    5.1. The first field is the Action field, which indicates the connection type (Time Reached).
    5.2. The second field is the Description field, which will display a short description of when the connection will be triggered.
    5.3. The next field is the Status field, where you can activate or deactivate the connection by clicking the blue or red button, respectively. Activating a connection means it can be used in the campaign and should perform as expected.

[**Note:** Keep in mind the connection will not become active until you save the campaign.]

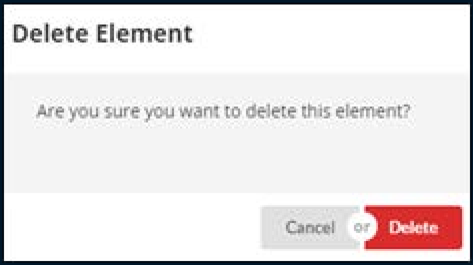


   5.4. The last field is the Line Colour field where you can choose the colour for that connection's line.
   5.5. **To choose a colour:**
      5.5.1. Click on the colour square in the field, and a colour selector will appear, or enter the hex code of the colour in the field next to the square.
      5.5.2. Choose your desired colour from the pre-set swatches on the left side of the selector dropdown or use the right side to manually choose a colour.
   5.6. Click the Choose button at the bottom right side of the colour selector to lock in your colour or click Cancel to close the selector dropdown without picking a colour.

6. To copy a connection, hover your mouse over the textbox appearing on the connection to show a blue button at the top left of the textbox. Copying a connection saves you from having to reconfigure the settings for any additional connections requiring the same conditions, saving time. Click and drag this button to create a new connection that can be attached to a new element. All connection settings configured in the initial connection will be copied over to the new connection.

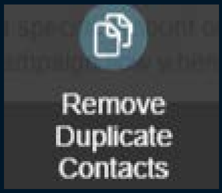
7. Delete a connection by hovering over the connection's textbox and clicking the red "X" button.

8. To delete the element from the campaign, hover your mouse over the element and click the red "X" button in the top right corner that appears. A pop-up window will appear asking you to confirm the deletion. Click the red Delete button to complete the deletion or Cancel to close the window without deleting the element.



[**Note:** You will only receive the confirmation pop-up if the element has been activated or if the campaign has been saved.]

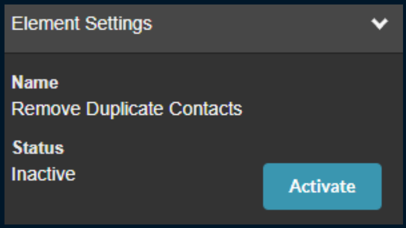
Remove Duplicate Contacts



The fourth drag-and-drop element in the Choices & Delays tab is the Remove Duplicate Contacts element. This allows you to prevent any contacts from proceeding any further in the campaign if they have already passed through.

To begin setting up this element:

1. Click and drag the Remove Duplicate Contacts element or double-click it to add it to the canvas.
2. Once you have placed the element onto the canvas and have it selected with your mouse, four additional fields will appear in the Element Settings section in



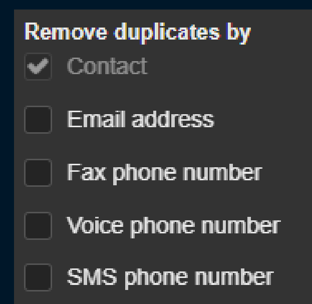
the Settings Panel on the right-hand side of your screen:

2.1. **Name:** This field contains the name for the element.

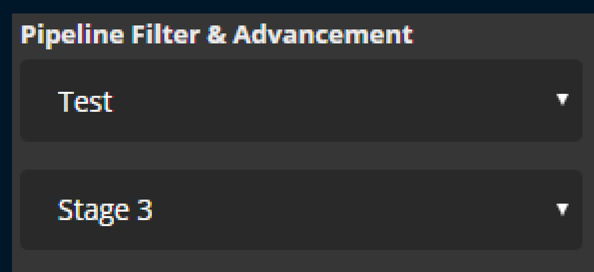
2.2. **Status:** This field is where you can activate or deactivate the element by clicking the blue or red button, respectively. Activating an element means it can be used in the campaign and should perform as expected.

[**Note:** Keep in mind the element will not become active until you save the campaign.]

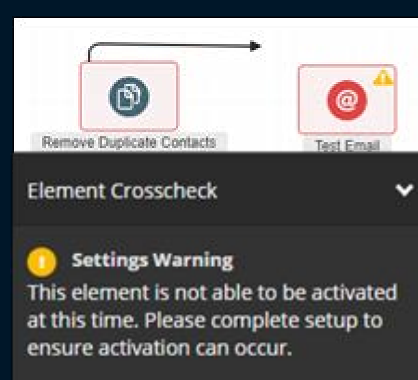
2.3. **Remove Duplicates By:** This field lets you choose the information you want to filter out and remove duplicate contacts by. You can filter contacts based on email address, fax number, voice phone number, and SMS phone number. To select one or more of these options, click the checkbox beside the respective option.



3. **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 for this field, choose the pipeline you would like contacts added to. A second dropdown will appear to select the pipeline stage to which contacts will be added once they reach this point in the campaign. If you choose to set a pipeline stage to this element, an icon will appear in 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.



4. If there is an issue with the element that needs to be resolved before the element can be activated, there will be a yellow or red exclamation point symbol in the top right corner of the element to signify this. If this is the case, when you select the element with your mouse, an additional section called Element Crosscheck will appear in the Settings Panel. The



Element Crosscheck section will describe the issue with the element and provide instructions for resolving it.

5. To connect your Remove Duplicate Contacts element to another element in your campaign, click the black target icon located on the top corner of the element and drag it over the element you wish to connect it to.

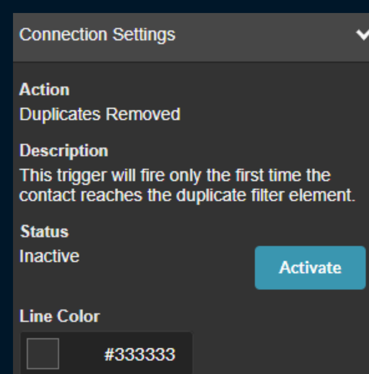
[**Note:** Some elements cannot be connected to each other. For example, you cannot connect two Starting Point elements to each other, and you cannot connect a Starting Point element to the Contact Changed, Start from CRM, or Inbound API elements.]

6. Once a connection has been established between the Remove Duplicate Contacts element and at least one other element, a textbox with the connection type will appear on the line: Duplicates Removed. Click on this textbox to open a new Connection Settings section.

6.1. The first field is the Action field, which indicates the connection type (Duplicates Removed).

6.2. The second field is the Description field, which will provide a short description of the action.

6.3. The third field is the Status field, where you can activate or deactivate the connection by clicking the blue or red button, respectively. Activating a connection means it can be used in the campaign and should perform as expected.

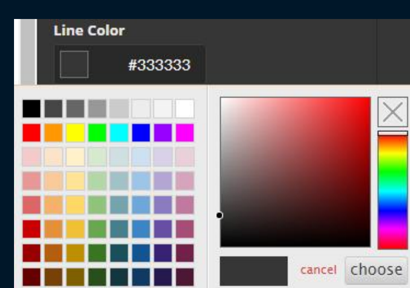


[**Note:** Keep in mind the connection will not become active until you save the campaign.]

7. The third line is the Line Colour field where you can choose the colour for that connection line.

8. **To choose a colour:**

8.1. Click on the colour square in the field, and a colour selector will appear, or enter the hex code of the colour in the field next to the square.

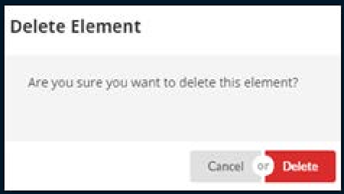


8.2. Choose your desired colour from the pre-set swatches on the left side of the selector dropdown or use the right side to manually choose a colour.

8.3. Click the Choose button at the bottom right side of the colour selector to lock in your colour or click Cancel to close the selector dropdown without picking a colour.

9. To copy a connection, hover your mouse over the textbox appearing on the connection to show a blue button at the top left of the textbox. Copying a connection saves you from having to reconfigure the settings for any additional connections requiring the same conditions, saving time. Click and drag this button to create a new connection that can be attached to a new element. All connection settings configured in the initial connection will be copied over to the new connection.

10. Delete a connection by hovering over the connection's textbox and clicking the red "X" button.



11. To delete the element from the campaign, hover your mouse over the element and click the red "X" button in the top right corner that appears. A pop-up window will appear asking you to confirm the deletion. Click the red Delete button to complete the deletion or Cancel to close the window without deleting the element.

[**Note:** You will only receive the confirmation pop-up if the element has been activated or if the campaign has been saved.]

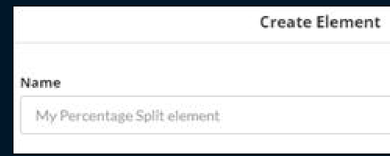
Percentage Split

The fifth drag-and-drop element in the Choices & Delays tab is the Percentage Split element. This element allows you to send different messages to different contacts as they progress through the campaign, based on percentages.

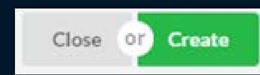
To begin setting up a percentage split:

1. Click and drag the Percentage Split element or double-click it to add it to the canvas.

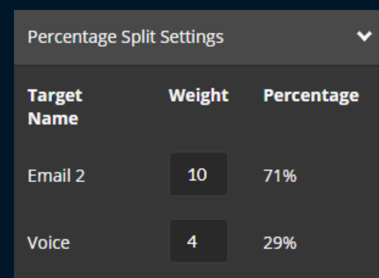
2. When you place the element, a sidebar will appear with a Name field that will ask you to enter a name for the new element. Type the name into the textbox provided.



3. Click the green Create button to add the element and close the sidebar or click the gray Close button to close the sidebar without adding the element.



4. 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:

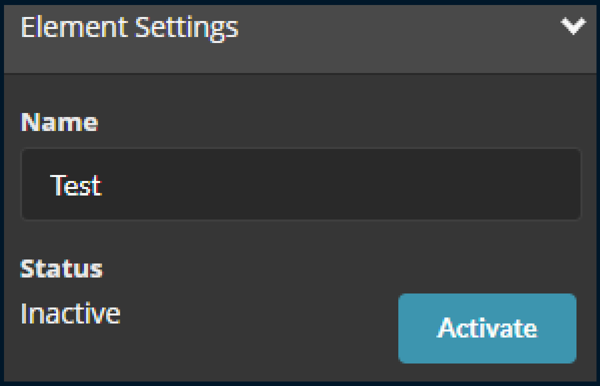


4.1. **Percentage Split Settings:** This field can be edited once the element is connected to at least one other element. It allows you to determine the weighting assigned to each element to which the Percentage Split element is connected.

4.1.1. Based on the weighting you choose, the percentage of contacts who take a specific path in the campaign will be automatically updated and displayed in this field. There are three information columns in this section that will contain data once an element has been connected to the Percentage Split element.

4.1.2. The Target Name column will display the name(s) of the Campaign element(s) connected to the Percent Split element; the Weight column will be where you can determine the relative value of each of the elements connected to the Percentage Split element to apply the percentage that will appear in the third column. This will be explained a little later in the setup process.

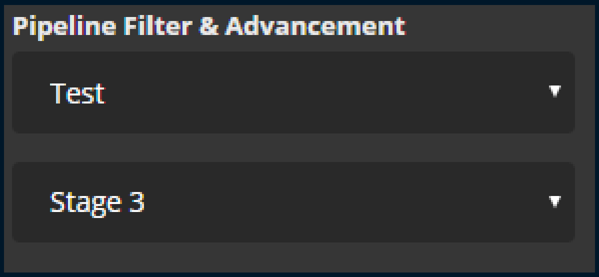
4.2. **Name:** This field contains the name you selected when you added the element to the canvas. To change the name of your element, edit the name in the textbox provided.



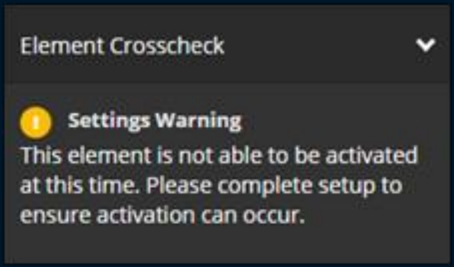
4.3. **Status:** This field is where you can activate or deactivate the element by clicking the blue or red button, respectively. Activating an element means it can be used in the campaign and should perform as expected.

[**Note:** Keep in mind the element will not become active until you save the campaign.]

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



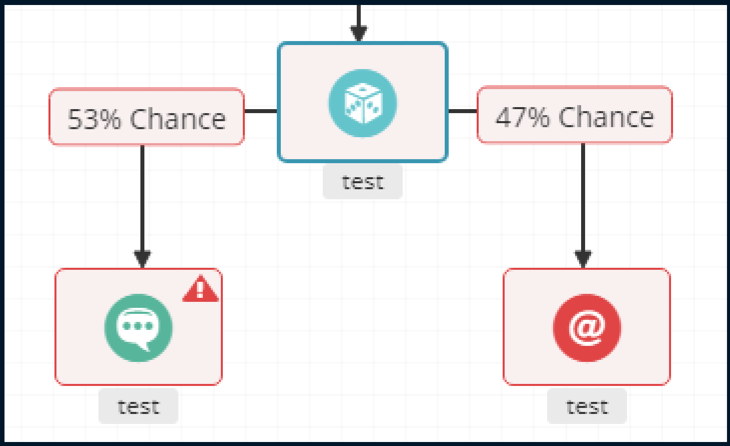
5. If there is an issue with the element that needs to be resolved before the element can be activated, there will be a yellow or red exclamation point symbol in the top right corner of the element to signify this. If this is the case, when you select the element with your mouse, an additional section called Element Crosscheck will appear in the Settings Panel. The Element Crosscheck section will describe the issue with the element and provide instructions on how to resolve it.



6. To connect your Percentage Split element to another element in your campaign, click the black target icon located on the top corner of your element and drag it over to the element you wish to connect it to.

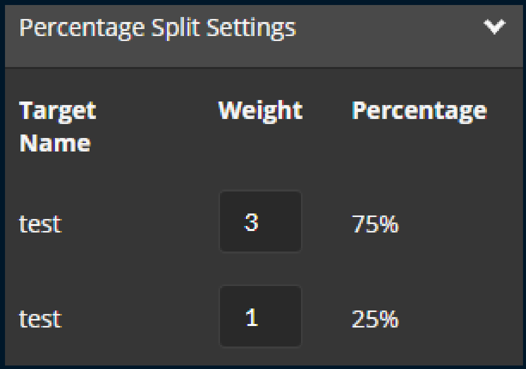
[**Note:** Some elements cannot be connected to each other. For example, you cannot connect two Starting Point elements to each other, and you cannot connect a Starting Point element to the Contact Changed, Start from CRM, or Inbound API elements.]

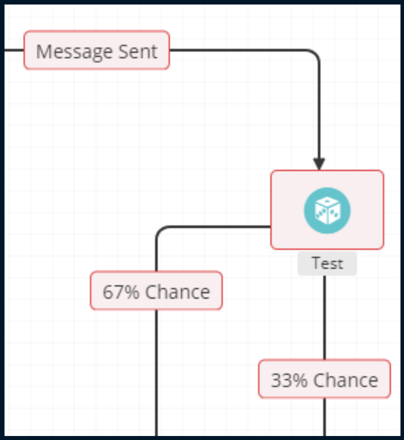
7. Once a connection has been established between the Percentage Split element and at least one other element, a textbox will appear on the line. Click on this textbox to open the Settings Panel. You will see the Percentage Split Settings and New Connection Settings sections. The Percentage Split Settings section will now include fields for each element connected to the percentage split element.



8. **To set up the percentage split:**

   8.1. If the Percentage Split element is only connected to one other element, you can only set the percentage to 0% or 100%. However, if the element is connected to multiple elements, you may adjust the percentage of each element as you like by entering a number in the Weight field for each connection. When a Weight number (value indicating the relative importance of each connection) is assigned, the system will automatically calculate the difference between those numbers in percentages, with the total being 100% between them all.





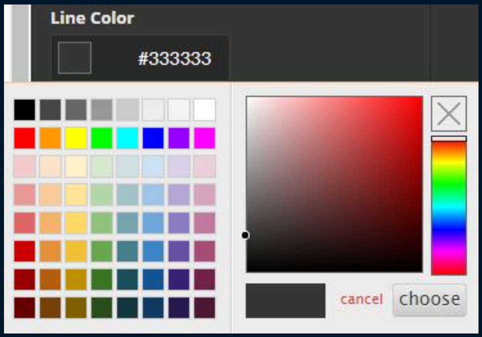
[**Note:** For example, if you connect the Percentage Split element to two other elements and give each connection a Weight of 1, the split between the two will be 50/50, meaning there is a 50% chance of contacts going down each path. However, if you give the first connection a weight of 1 and the second a weight of 2, the chances of contacts taking the second path should be about twice those of the first. So, in this case, contacts will have a 33% chance of going down the first path and a 67% chance of going down the second path.]

8.2. Once the Percentage Split Settings have been configured, the line connecting the Percentage Split element and each other element will contain a textbox displaying the percentage allocated to that connection.

9. The first field in the Connection Settings section is the Action field, which indicates the connection type (Percentage Split).
10. The second field is the Description field, which will display a short description of when the connection will be triggered.

11. The next field is the Status field, where you can activate or deactivate the connection by clicking the blue or red button, respectively. Activating a connection means it can be used in the campaign and should perform as expected.

[**Note:** Keep in mind the connection will not become active until you save the campaign.]



12. The last field is the Line Colour field where you can choose the colour for that connection's line.

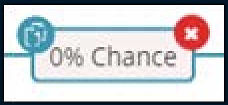
13. **To choose a colour:**

13.1. Click on the colour square in the field, and a colour selector will appear, or enter the hex code of the colour in the field next to the square.

13.2. Choose your desired colour from the pre-set swatches on the left side of the selector dropdown or use the right side to manually choose a colour.

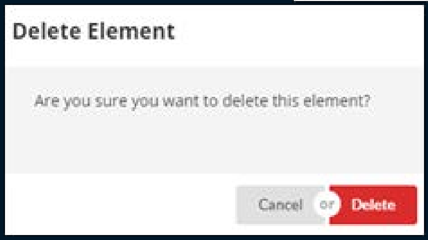
13.3. Click the Choose button at the bottom right side of the colour selector to lock in your colour or click Cancel to close the selector dropdown without picking a colour.

14. To copy a connection, hover your mouse over the textbox appearing on the connection to show a blue button at the top left of the textbox. Copying a connection lets you avoid reconfiguring the settings for any additional connections that require the same conditions, saving time. Click and drag this button to create a new connection that can be attached to a new element. All connection settings configured in the initial connection will be copied over to the new connection.



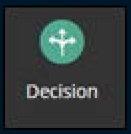
15. Delete a connection by hovering over the connection's textbox and clicking the red "X" button.

16. To delete the element from the campaign, hover your mouse over the element and click the red "X" button in the top right corner that appears. A pop-up window will appear asking you to confirm the deletion. Click the red Delete button to complete the deletion or Cancel to close the window without deleting the element.



[**Note:** You will only receive the confirmation pop-up if the element has been activated or if the campaign has been saved.]

Decision

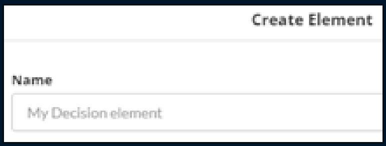


The sixth drag-and-drop element in the Choices & Delays tab is the Decision element. This element allows you to create multiple options to determine which path a contact will take in your campaign, depending on whether they meet specific criteria when interacting with previous elements.

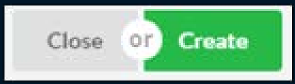
To begin setting up this element:

1. Click and drag the Decision element or double-click it to add it to the canvas.

2. When you place the element, a sidebar will appear with a Name field that will ask you to enter a name for the new element. Type the name into the textbox provided.

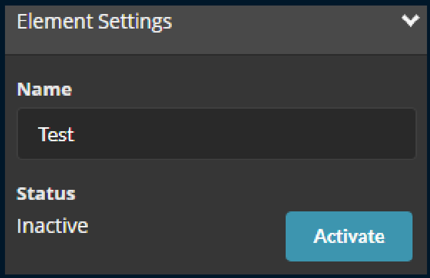


3. Click the green Create button to add the element and close the sidebar or click the gray Close button to close the sidebar without adding the element.



4. Once you have placed the element onto the canvas and have it selected with your mouse, three additional fields will appear in the Element Settings section on the right-hand side of your screen:

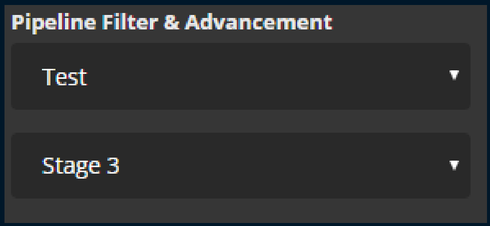
    4.1. **Name:** This field contains the name you selected when you added the element to the canvas. To change the name of your element, edit the name in the textbox provided.



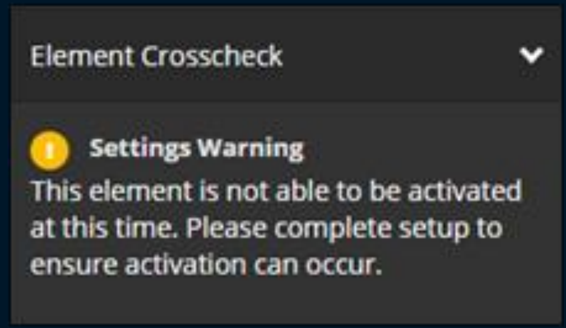
    4.2. **Status:** This field is where you can activate or deactivate the element by clicking the blue or red button respectively. Activating an element means that the element will be able to be used as part of the campaign and should perform as expected.

[**Note:** Keep in mind the element will not become active until you save the campaign.]

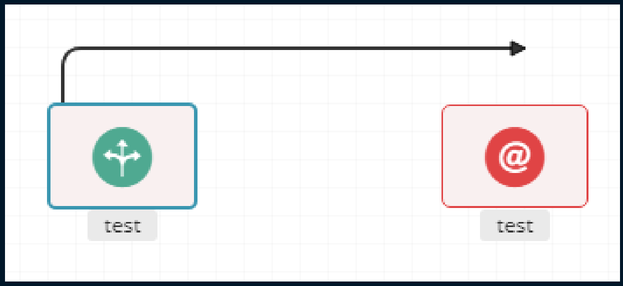
5. **Pipeline Filter & Advancement:** Choose whether you would like contacts to progress through any pipelines you may have associated with the campaign. In the dropdown menu in this field, choose the pipeline you would like contacts to be added to. A second dropdown will appear to choose the stage of 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.



6. If there is an issue with the element that needs to be resolved before the element can be activated, there will be a yellow or red exclamation point symbol in the top right corner of the element to signify this. If this is the case, when you select the element with your mouse, an additional section called Element Crosscheck will appear in the Settings Panel. The Element Crosscheck section will describe the issue with the element and provide instructions for resolving it.

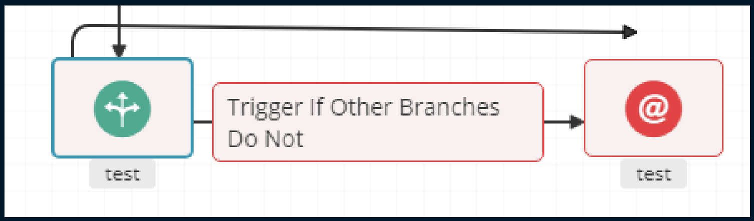


7. To connect your Decision element to another element in your campaign, which will allow you to configure the decision settings for this path a contact could follow, click the black target icon located in the top corner of your element and drag it over to the element you wish to connect it to.



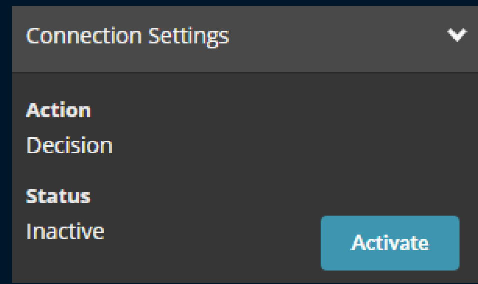
[**Note:** Some elements cannot be connected to each other. For example, you cannot connect two Starting Point elements to each other, and you cannot connect a Starting Point element to the Contact Changed, Start from CRM, or Inbound API elements.]

8. Once a connection has been established between the Decision element and at least one other element, a textbox with the connection type will appear on the line. Click on this textbox to open a new Connection Settings section in the Settings Panel.



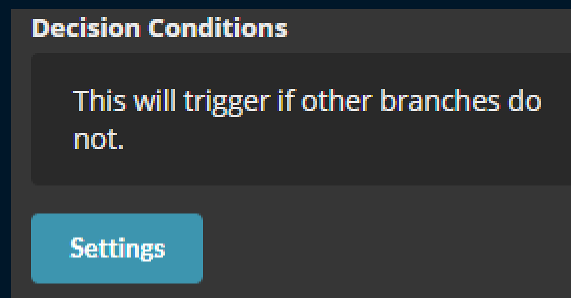
9. The first field in this section is the Action field, which indicates the connection type (Decision).
10. The second field is the Description field, which will display a short description of when the connection will be triggered.

11. The next field is the Status field, where you can activate or deactivate the connection by clicking the blue or red button, respectively. Activating a connection means it can be used in the campaign and should perform as expected.

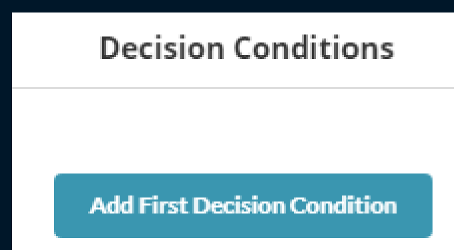


[**Note:** Keep in mind the connection will not become active until you save the campaign.]

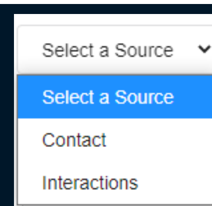
12. The last field is the Decision Conditions field, which describes the condition under which the decision is made and allows you to adjust the decision settings. Click the blue Settings button to change the decision's settings. Clicking this button will open a sidebar.



13. **From here:**
    13.1. Click the blue Add First Decision Condition button located at the top of the sidebar.

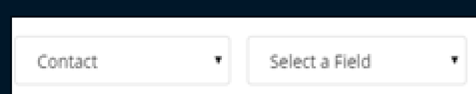


    13.2. A dropdown field will appear where you are asked to choose one of two data sources (from which the system will pull the decision information):



        13.2.1. **Contact:** This option refers to any basic information found in the columns of a contact's profile in the CRM.
        13.2.2. **Interactions:** This option refers to any recorded actions a contact has taken, such as how they interact with campaigns and the content within them (links, clicks, score, etc.).

    13.3. If you chose Contact as your data source, a new dropdown field will appear to the right of the Data Source field, where you must choose the CRM field the system will pull the necessary information from to determine whether the contact should continue down this decision path in the campaign.

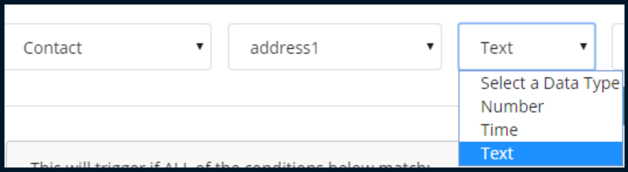


    13.4. **There are 33 default options in this menu:**

Address 1	Email_optin	Modified
Address 2	Email_sendable	Name
City	Email_unsubscribe	Phone
Company	Email_valid	Phone_sendable
Country	Fax	Phone_valid
Created	Fax_sendable	Postal Code/ZIP
Email	Fax_valid	Preferred_method
Email_hard_bounce	Location	Province/State
Email_last_open	Mobile	Salutation
Email_last_send	Mobile_sendable	Source
Email_last_softbounce	Mobile_valid	Title

[**Note:** If your account has added any custom columns to the CRM, these columns will also appear in this list.]

13.5. Once you have chosen a CRM field, a third field will appear where you are asked to choose a data type (the specific format the data is stored as). There are five options available in the dropdown menu depending on the column selected:



13.5.1. **Time:** The data is stored in time format.

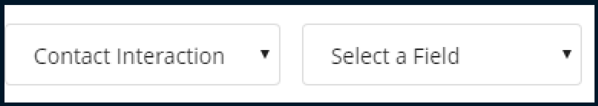
13.5.2. **Text:** The data is stored in text format.

13.5.3. **Number:** The data is stored in number format.

13.5.4. **Boolean:** The data is stored as either a true or false value.

13.5.5. **Region:** The data is stored as a geographical area on a map (Refer to the *SimplyCast Blueprints & Map User Guide* for more information about regions)

13.6. Alternatively, if you have chosen Interactions as your data source, a new field will appear to the right of the Data Source field, where you are asked to choose the information field the system will pull the necessary information from to determine the path the contact should follow in your campaign.



13.6.1. **There are 23 default options in this field:**

- Account Manager
- Acquisition Cost
- Ad Campaign
- Ad Content
- Ad Medium
- Ad Source
- Alternate Contact
- Email Link Clicks
- Email Opens
- Email Sends
- Fax Deliveries
- Fax Sends
- Link Clicks
- Potential Value
- Purchase Amount
- Score
- Search Term
- Site Category
- SMS Deliveries
- SMS Sends
- Tags
- Voice Deliveries
- Voice Sends

[**Note:** Any pipelines or custom fields you have created will also appear as options in this dropdown menu.]

13.7. Once you have chosen either the data type and CRM field for your Contact data source or the information field for your Interactions data source, an Operation field will appear to the right of the others, where you are asked to choose a means of comparison. There are 16 possible comparison options, depending on the field or data you are looking at:

13.7.1. **Greater Than/Equals:** This option is available with every CRM field option for the Contact data source's Time and Number data types, as well as every Interactions data source option except for Tags, Account Manager, Ad Source, Ad Campaign, Ad Content, Ad Medium, Search Term, and Site Category.

13.7.2. **Less Than/Equals:** This option is available with every field option for the Contact data source's Time and Number data types, as well as every

Interaction's data source option except for Tags, Account Manager, Ad Source, Ad Campaign, Ad Content, Ad Medium, Search Term, and Site Category.

13.7.3. **Greater Than:** This option is available with every CRM field option for the Contact data source's Time and Number data types, as well as every Interaction data source option except for Tags, Account Manager, Ad Source, Ad Campaign, Ad Content, Ad Medium, Search Term, and Site Category.

13.7.4. **Less Than:** This option is available with every field option for the Contact data source's Time and Number data types, as well as every Interactions data source option, except for Tags, Account Manager, Ad Source, Ad Campaign, Ad Content, Ad Medium, Search Term, and Site Category.

13.7.5. **Equals:** This option is available with every CRM field option for the Contact data source's data types, as well as every Interaction data source option except for Tags, Ad Source, Ad Campaign, Ad Content, Ad Medium, Search Term, and Site Category.

13.7.6. **Not Equal:** This option is available with every CRM field option for the Contact data source's data types, as well as every Interaction data source option except for Tags, Ad Source, Ad Campaign, Ad Content, Ad Medium, Search Term, and Site Category.

13.7.7. **Contains:** This option is available in every field for the Contact data source's Text data type.

13.7.8. **Does Not Contain:** This option is available with every field for the Contact data source's Text data type.

13.7.9. **Is In Group:** This option is available for the Interactions data source's Tags, Ad Source, Ad Medium, Ad Campaign, Ad Content, Search Term, and Site Category fields.

13.7.10. **Is Not In Group:** This option is available for the Interactions data source's Tags, Ad Source, Ad Medium, Ad Campaign, Ad Content, Search Term, and Site Category fields.

13.7.11. **Starts With:** This option is available with every field for the Contact data source's Text data type.

13.7.12. **Ends With:** This option is available with every field for the Contact data source's Text data type.

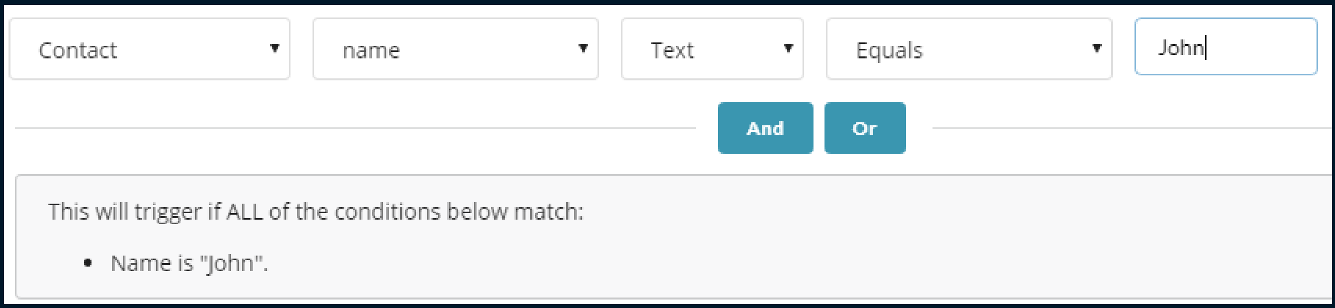
13.7.13. **In All:** This option is only available for columns with a Location data type

13.7.14. **In Any:** This option is only available for columns with a Location data type

13.7.15. **Not in All:** This option is only available for columns with a Location data type

13.7.16. **In None:** This option is only available for columns with a Location data type

13.8. After you have selected your means of comparison from the dropdown, a final field will appear at the far right of the sidebar. In this field, you can enter a value for the system to use when determining which path the contact should take in the campaign. Type in your desired value in this text field, select a date from the dropdown calendar for any date data types, or select one or more map regions for any location data types.



[**Note:** For the Interactions data source's Account Manager field, this last field will include a dropdown menu where you can choose from a list of names associated with the account or choose the No Account Manager option. The account manager is the SimplyCast user designated as responsible for reaching out to and managing requests under this contract. For example, the image above depicts a decision wherein the contact will continue down this journey only if their name is John.]

14. **To create this decision condition:**

14.1. Select "Contact" as your data source.

14.2. Select "Name" as your CRM field.

14.3. Select “Text” as your data type.

14.4. Select “Equals” as your means of comparison.

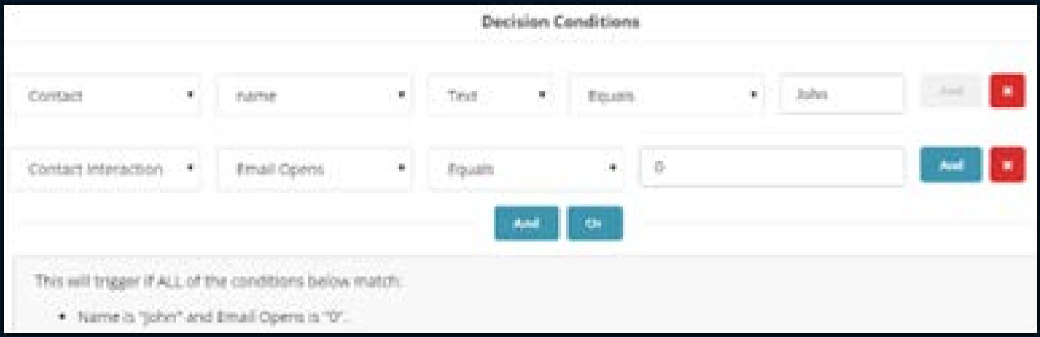
14.5. Enter “John” into the Value field.

14.6. Your decision should look like this: *Contact > Text > Name > Equals > John*

15. You can also create additional conditions for this decision by using the And and Or buttons located to the right of the first decision condition. Clicking the And or Or buttons adds a field set beneath the original decision.

16. Choosing “And” will cause the decision process to look at both conditions and only send the contact down this path in the campaign if they meet the parameters of both field sets. For example, say that in addition to their name being John, for a contact to be sent down this path, they must also have not opened any previous emails.

17. **To demonstrate this example:**



17.1. Select the “And” button to the right of the first condition to create a new field set below the first decision condition.

17.2. Select “Contact Interaction Data” as your data source.

17.3. Choose “Email Opens” as your information field.

17.4. Select “Equals” as your means of comparison.

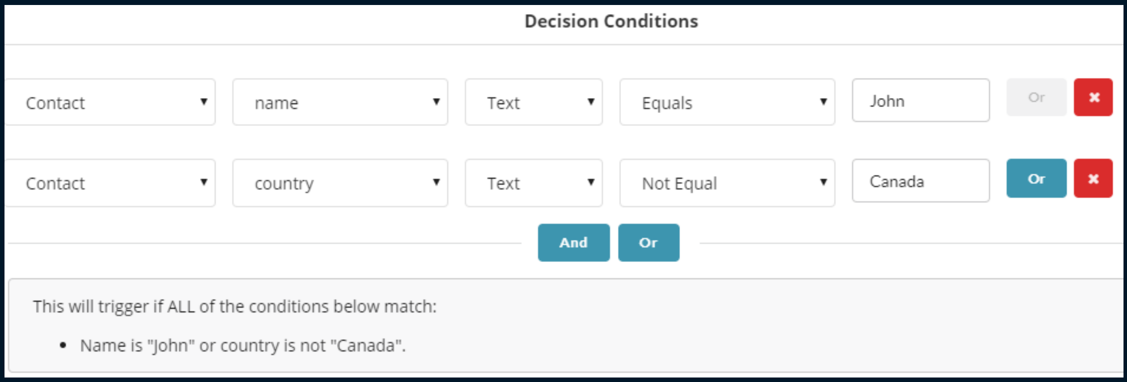
17.5. Type “0” into the Value field.

17.6. Your decision should now look like this: *Contact > Text > Name > Equals > John* **AND** *Contact Interaction Data > Email Opens > Equals > 0*

18. On the other hand, choosing “Or” will cause the decision process to look at the multiple conditions, and if at least one of them applies to the contact, they will be sent down this path in the campaign. For example, starting with the first decision

example, where only contacts whose names are John will be sent down this path, we can add an alternate condition that sends contacts whose names aren't John down this path if they reside outside of Canada.

19. **To demonstrate this example:**



19.1. Select the "Or" button to the right of the first condition to create a new field set below the first decision condition.

19.2. Select "Contact" as your data source.

19.3. Select "Country" for the CRM field.

19.4. Choose "Text" as your data type.

19.5. Select "Not Equal" as the means of comparison.

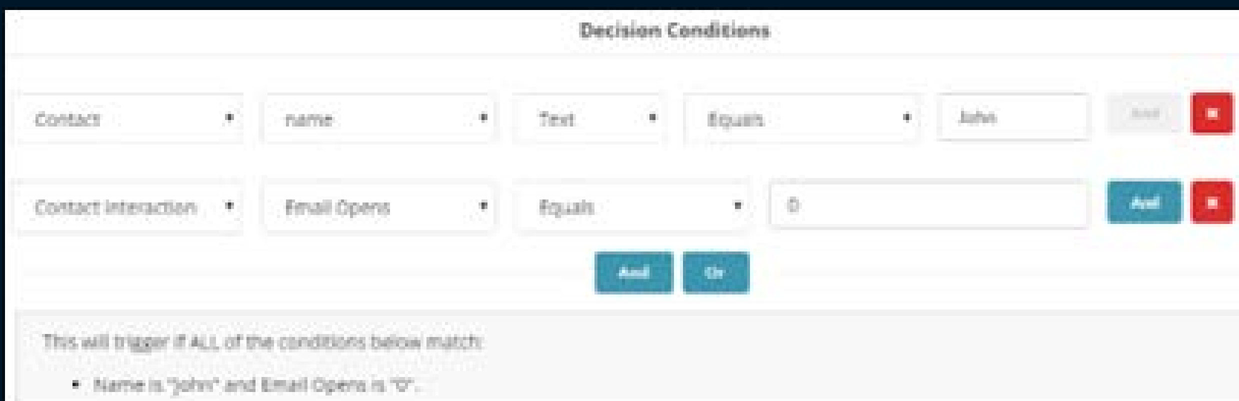
19.6. Type "Canada" into the Value field.

19.7. Now, the new filter will look like this: *Contact > Text > Name > Equals > John* **OR** *Contact > Text > Country > Not Equal > Canada*

20. Create as many conditions for the decision filter as you like by continuing to click the "And" or "Or" buttons, depending on your first selection.

[**Note:** Once you have selected either "And" or "Or" when creating a new decision condition, if you want to add additional conditions, you will only have that option available. For example, if you have a condition such as "this" AND "that," you will not be able to add an "Or" option to the condition. To add an "Or" decision condition in this case, you will need to create a separate decision group. See below for more.]

21. You can also create different decision groups within the same Decision element by clicking the “And” or “Or” buttons below the first decision group. Whereas decision conditions are directly affected by each other on an individual level (for example: “this” AND/OR “that” AND/OR “that”), decision groups are affected by other decision groups as a whole and not the specific conditions within them. You can have a decision group that has a “this” OR “that” OR “that” condition, and another decision group that must also apply – [AND] “this” OR “that” OR “that.” This means you can set up a decision that matches the contact when the conditions in one decision group are met and/or when the conditions in any additional group are met. This allows you to create very complex decision conditions.



22. For example, say we continue with the first “and” decision set we created, where for a contact to progress down a certain path, their name must be John, and they must not have opened any past emails. However, we also want to contact them to progress down the path regardless of whether their name is John and they haven’t opened any emails, if their contact score is greater than or equal to 50. Since we cannot add this “or” condition to the initial decision group, we must create a new one.

23. **To demonstrate this example from the beginning:**
    - 23.1. Select “Contact” as your data source.
    - 23.2. Select “Name” as your CRM field.
    - 23.3. Select “Text” as your data type.
    - 23.4. Select “Equals” as your means of comparison.
    - 23.5. Enter “John” into the Value field.
    - 23.6. Your decision should look like this: *Contact > Text > Name > Equals > John*

23.7. Select the "And" button to the right of the first condition to create a new field set below the first decision condition.

23.8. Select "Contact Interaction Data" as your data source.

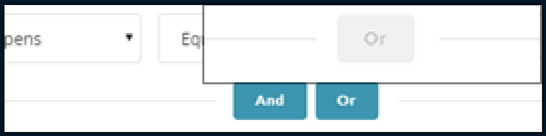
23.9. Choose "Email Opens" as your information field.

23.10. Select "Equals" as your means of comparison.

23.11. Type "0" into the Value field.

23.12. Your decision should now look like this: *Contact > Text > Name > Equals > John* **AND** *Contact Interaction Data > Email Opens > Equals > 0*

23.13. Next, click the blue "Or" button **below** these conditions to add a new decision group below the first.



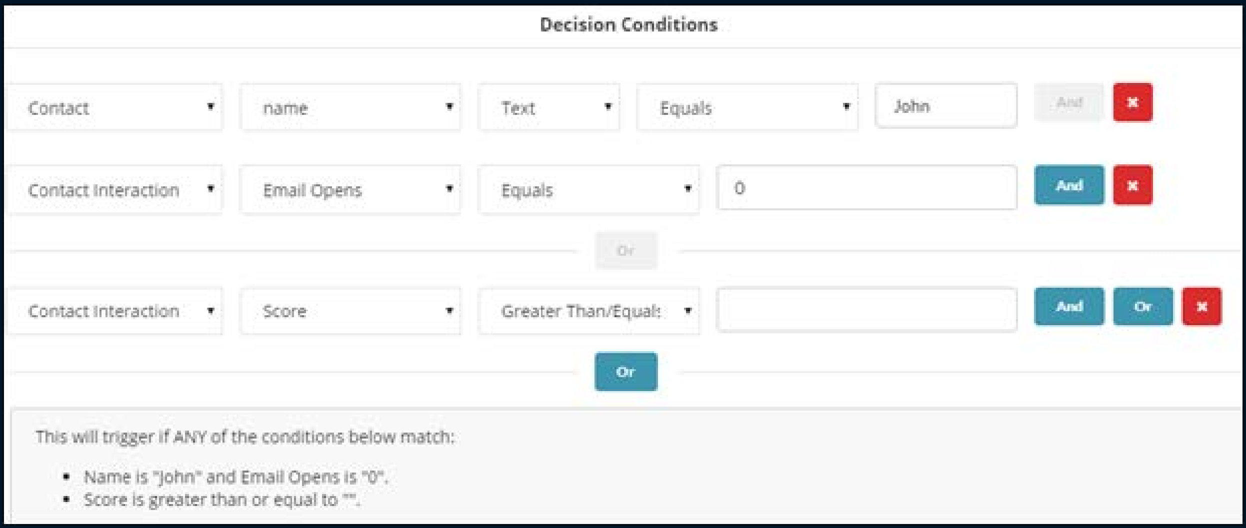
[**Note:** There should be a gray divider line with a grayed-out "Or" icon between the two decision groups to indicate the separation between the groups.]

23.14. In this new decision group, select "Contact Interaction Data" as the data type.

23.15. Select "Score" as the information field.

23.16. Select "Greater Than/Equals" as the means of comparison.

23.17. Enter "50" into the Value field.



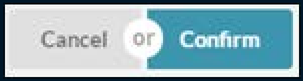
23.18. Now the decision should look like this: (*Contact > Text > Name > Equals > John* AND *Contact Interaction Data > Email Opens > Equals > 0)* **OR** (*Contact Interaction Data > Score > Greater Than/Equal > 50)*

24. Create as many decision groups as you'd like by continuing to click the "And" or "Or" buttons below the last group, depending on your first selection.

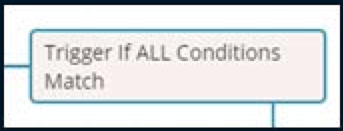
[**Note:** Once you have selected either "And" or "Or" when creating a new decision group, if you want to add additional groups, you will only have that option available. For example, if you have two groups such as (this AND that) OR (that), you will not be able to add an "And" group to the decision.]

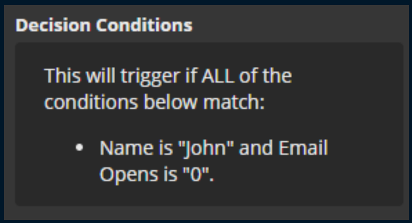
25. Delete a decision condition in the sidebar by clicking the red X button located on the right side of the sidebar across from the decision condition you wish to delete.

26. Once you've finished configuring the decision, click the blue Confirm button at the bottom left of the Decision Settings sidebar. Or, click Cancel to close the sidebar without configuring the decision.



27. Once you have configured a decision, the textbox on the connection between the two elements will now read "Trigger if ALL Conditions Match" or "Trigger if ANY Conditions Match," and the Decision Conditions field in the Connection Settings section will describe the decision conditions required to trigger the connection.





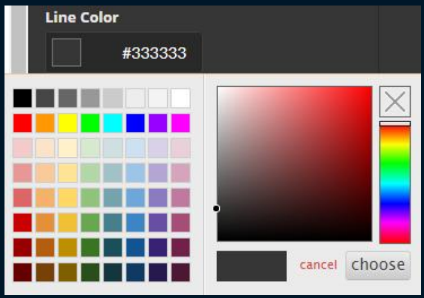
[**Note:** Repeat these steps for any other connections between the Decision element and any other element in the campaign as required.]

28. The fourth field in the Settings Panel is the Line Colour field where you can choose the colour for that connection's line.

29. **To choose a colour:**

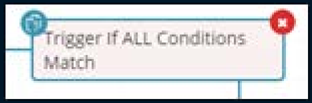
    29.1. Click on the colour square in the field, and a colour selector will appear, or enter the hex code of the colour in the field next to the square.

    29.2. Choose your desired colour from the pre-set swatches on the left side of the selector dropdown or use the right side to manually choose a colour.



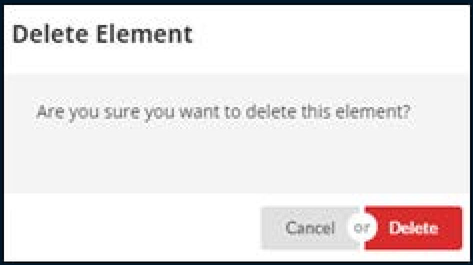
29.3. Click the Choose button at the bottom right side of the colour selector to lock in your colour or click Cancel to close the selector dropdown without picking a colour.

30. To copy a connection, hover your mouse over the textbox appearing on the connection to show a blue button at the top left of the textbox. Copying a connection lets you avoid reconfiguring the settings for any additional connections that require the same conditions, saving time. Click and drag this button to create a new connection that can be attached to a new element. All connection settings configured in the initial connection will be copied over to the new connection.



31. Delete a connection by hovering over the connection's textbox and clicking the red "X" button.

32. To delete the element from the campaign, hover your mouse over the element and click the red "X" button in the top right corner that appears. A pop-up window will appear asking you to confirm the deletion. Click the red Delete button to complete the deletion or Cancel to close the window without deleting the element.



[**Note:** You will only receive the confirmation pop-up if the element has been activated or if the campaign has been saved.]

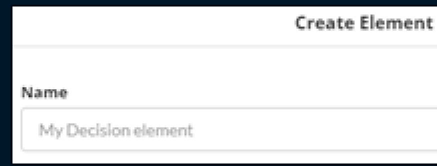
Split To Multiple

The last drag-and-drop element in the Choices, Delays & Splits tab is the Split to Multiple element. This element allows you to split the flow across several possible outcomes based on specific criteria.

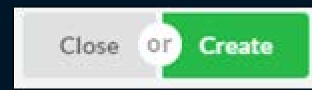
To begin setting up Split to Multiple:

1. Click and drag the Split to Multiple element or double-click it to add it to the canvas.

2. When you place the element, a sidebar will appear with a Name field that will ask you to enter a name for the new element. Type the name into the textbox provided.



3. Click the green Create button to add the element and close the sidebar or click the gray Close button to close the sidebar without adding the element.



4. Once you have placed the element onto the canvas and have it selected with your mouse, three additional fields will appear in the Element Settings section on the right-hand side of your screen: