SimplyCast

Powering Automation, Igniting Growth for Smarter Connections

SimplyCast 360

Automation Flow Editor Creation Classic User Guide

Updated on: July 1st, 2025

Contents

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

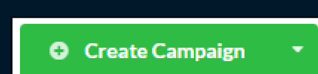
The SimplyCast 360 Automation Flow Editor allows you to create and customize your new automated campaign, however you like, using the drag-and-drop interface to bring in many different elements and rules. You will be redirected to the Automation Flow Editor once you create a new SimplyCast 360 campaign.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

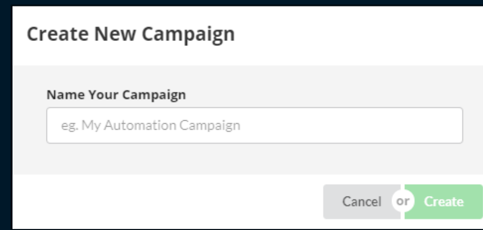
[**Note:** Refer to the *SimplyCast 360 Glossary Guide* for more key terms and definitions.]

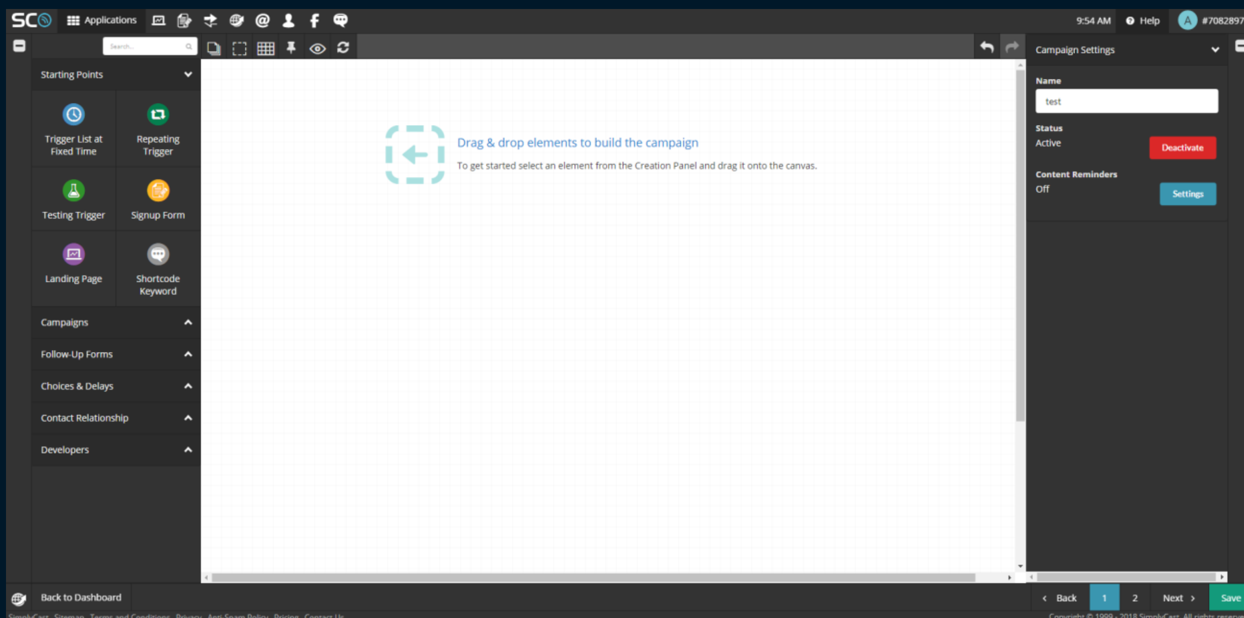
To access the SimplyCast Automation Flow Editor:

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



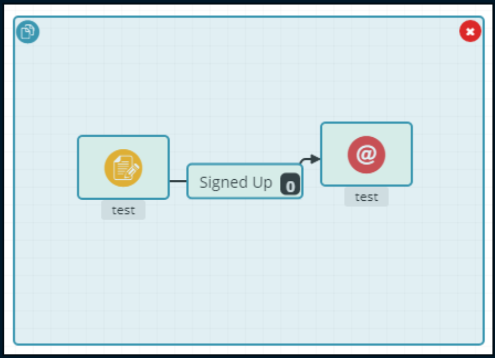
2. A pop-up will appear where you will be asked to name the campaign. Type the name into the textbox provided.
3. Click the green Create button to create the campaign, close the sidebar, and be redirected to the Automation Flow Editor.
   3.1. Or click Cancel to close the pop-up without creating a campaign.





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.

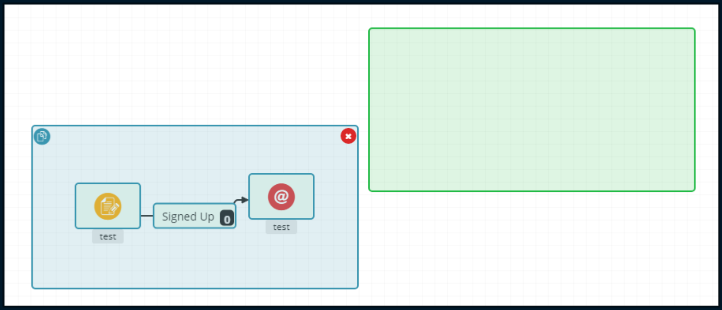


You are also able to highlight a section on the canvas containing multiple elements.

To do this:

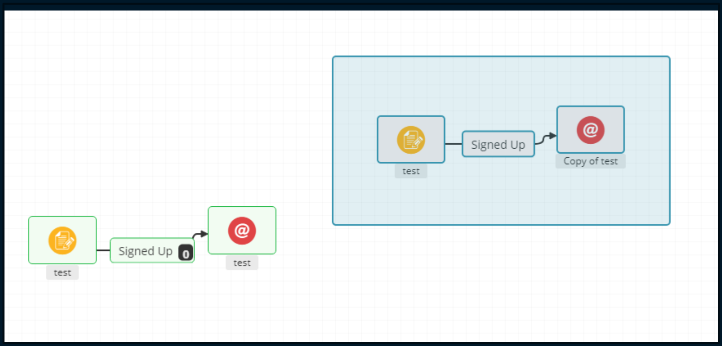
1. Click and hold the mouse down on a blank section of the canvas and drag the mouse to create a blue box.
2. Drag the mouse until the blue box covers all the elements you want highlighted, then release the mouse.

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.

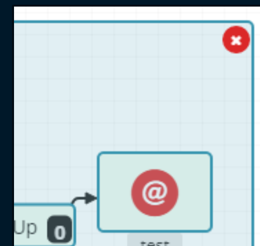


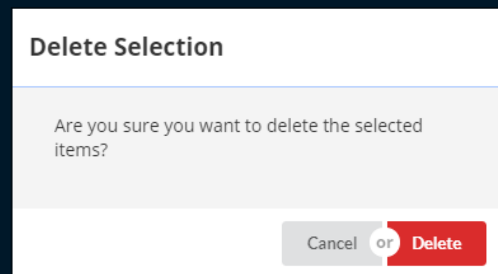
To do this:

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.



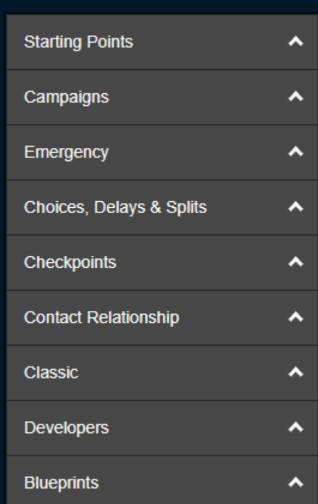
4. The red “X” icon on the top right corner is used to delete the highlighted section of your campaign. When you hover your mouse over the highlighted section, this red “x” icon will appear. Click the icon, and a pop-up will appear asking you to confirm your deletion. Click the red Delete button to confirm 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.

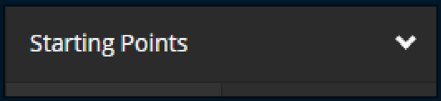
To add a SimplyCast 360 element to your campaign, either drag and drop the icon into the canvas or double-click the icon. There are nine different tabs of elements you can choose from.

These are:

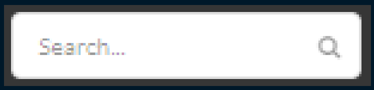
1. **Starting Points:** These elements can be used as a jumping-off point in creating the SimplyCast 360 campaign.
2. **Campaigns:** These elements are the different types of messages that can be sent to project contacts and can be set up and customized in their respective editors.

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 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 the elements within that tab. To close the tab, click the tab name again.

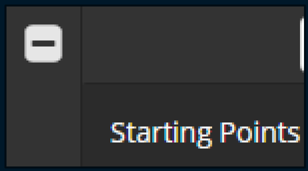


Search for a specific element using the search bar above the Creation Panel. This saves you from opening multiple tabs until you find the element needed. Enter your search query into the search bar and the elements displayed will begin to filter.

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.]

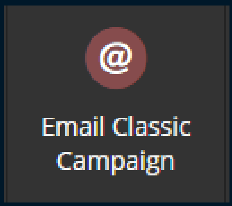
In the top left corner of the Creation Panel, there is a gray "-" button. To hide the Creation Panel and expand the Canvas, click this "-" button. Once the Creation Panel is hidden, the "-" button will turn into a "+" sign. When the Creation Panel is hidden, click the "+" sign to re-expand it.



Classic

The next tab in the Creation Panel on the left side of the screen is the Classic tab. This tab contains three 'classic' elements: older versions of Email, Form, and a deprecated Survey Builder. These tools are currently still supported, but are older versions of their respective tools and will eventually become unsupported.

Email Classic Campaign



The only drag-and-drop element in the Campaigns tab is the Email Classic Campaign Element. This element allows you to create and send an email created using the legacy Email Editor to your contacts when they reach a particular point in the campaign.

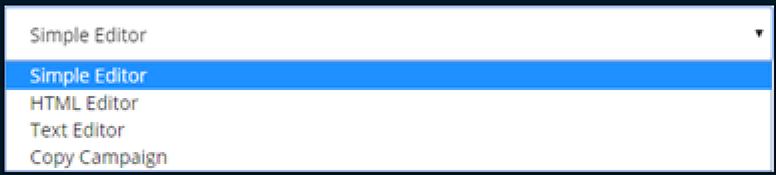
To begin setting up this element:

1. Click and drag the Email element or double click to add it to your canvas.
2. When you place the element, a sidebar will appear with two fields. The first field will ask you to choose the type of email to create from the dropdown menu in the Type field:

   2.1. **Simple Editor:** An email campaign created using the Simple Editor: using drag-and-drop elements to create the email.

   2.2. **HTML Editor:** An email campaign created using the Advanced HTML Editor: using HTML to create the email campaign.

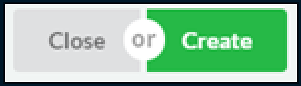
   2.3. **Text Editor:** An email campaign created using the Text Editor: using plain text to create the email campaign.



2.4. **Copy Campaign:** An email campaign created by copying an existing project. Choosing this option will create another field in the pop-up window where you must select the existing email campaign you would like to copy from the dropdown list.

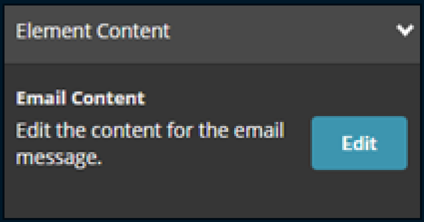
3. The second field will ask you to enter a name for the new Email element. Enter a name into the field provided.

4. Click the green Create button to create the element and close the sidebar. Or, click the gray Cancel button to close the sidebar without adding an Email Campaign element.

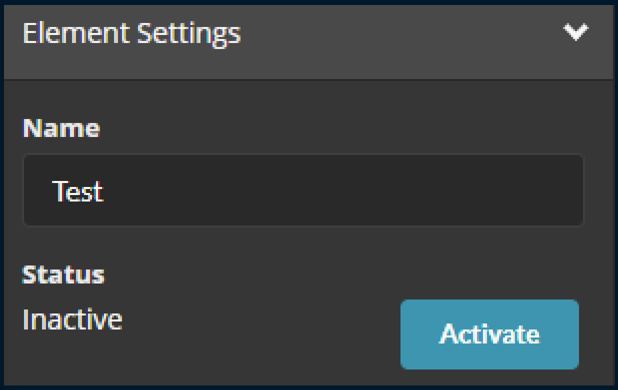


5. Once you have placed the element onto your canvas and have it selected with your mouse, four additional fields will appear in the Settings Panel on the right-hand side of the screen:

5.1. **Email Content:** Clicking the blue Edit button in the Element Content section will bring you to the Email application, where you can design, create, and edit the content and settings of the email. Refer to the *SimplyCast Email User Guide* for more information about creating and editing email campaigns.



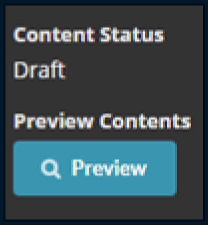
5.2. **Name:** This field contains the name you selected when you added the element to your canvas. To change the name of your element, edit the name in the textbox provided.

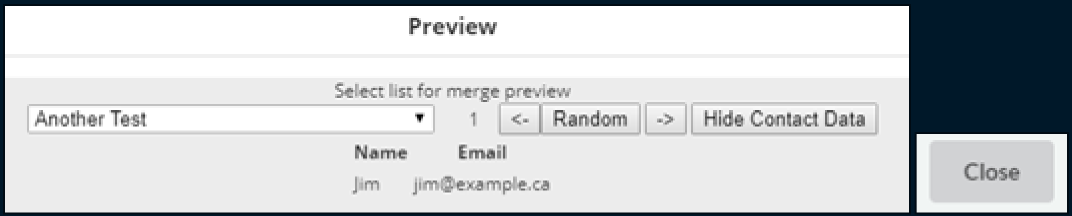


5.3. **Status:** This field is where you can activate or deactivate the element by clicking the blue or red button respectively. Activating an element means that the element will be able to be used as part of the campaign and should perform as expected.

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

5.4. **Content Status:** Once you have saved the SimplyCast 360 campaign after adding the Email element, you will see the Content Status field in the Settings Panel below the Status field. This field will provide you with the current state of the email campaign's content depending on how far you have progressed through the setup process (e.g. Draft, Pending Approval, etc.).

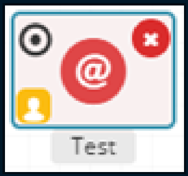


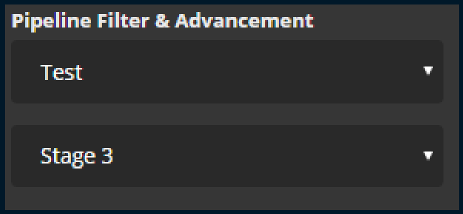


5.5. **Preview Contents:** Once you have saved the SimplyCast 360 campaign after adding the Email element, you will be able to preview the content of the email by clicking the blue Preview button appearing in this field. A sidebar will open where you are able to view the email content (if any has been added) as well as view a merged preview of the email that will show you how any added merge tags will appear once the email is sent. To view the merged preview, select a contact list from your CRM in the dropdown field at the top of the sidebar, and then select the Random button that appears to view the random contact from the list whose information will be merged into the email preview. The arrow buttons on either side of the Random button will choose another contact at random from the list. The Show Contact Data button on the right will provide you with the basic contact details (name and primary contact information) for each contact from the list. Click the Close button at the bottom of the sidebar to close the window and return to the SimplyCast 360 campaign.

5.6. **Subject Line:** Once you have finished the email campaign setup, the Subject Line field will appear in the Settings Panel below the blue Preview Contents button, containing the subject line you have included in the email setup.

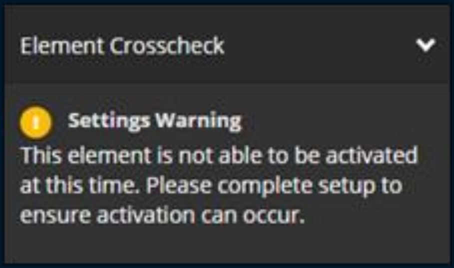
5.7. **Pipeline Filter & Advancement:** Choose whether you would like contacts to progress through any pipelines you may have associated with the campaign. In the dropdown menu in this field, choose the pipeline you would like contacts to be added to.



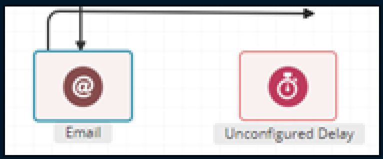


A second dropdown will appear to choose the stage of that pipeline contacts will be added to at this point of the campaign. If you choose to set a pipeline stage to this element, an icon will appear on the bottom left corner of the element in your campaign to indicate that contacts will move through a pipeline stage at this point in your campaign.

6. If there is an issue with the element setup 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.



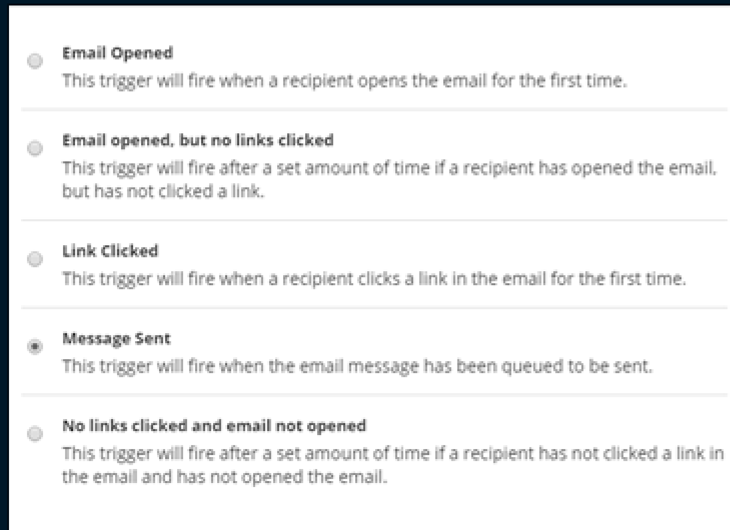
7. To connect your Email element to another element in your campaign, click the black target icon on the top corner of the element and drag it over to the element you wish to connect it to.



[**Note:** Some elements are not able to 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. A sidebar will appear where you can choose between five connection types:

    8.1. **Email Opened:** This means the campaign will continue through the connection when a recipient opens the email for the first time.



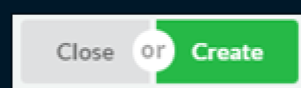
8.2. **Email Opened, But No Links Clicked:** This means the campaign will continue through the connection after a set amount of time if a recipient has opened the email but has not clicked any links in it.

8.3. **Link Clicked:** This means the campaign will continue through the connection when a recipient clicks a link (or a specific link) in the email for the first time.

8.4. **Message Sent:** This means the campaign will continue through the connection when the email message has been queued to be sent.

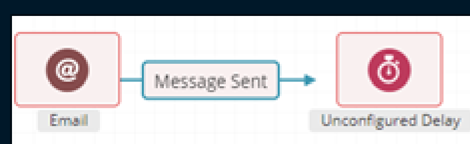
8.5. **No Links Clicked and Email Not Opened:** This means the campaign will continue through the connection after a set amount of time if a recipient has not clicked a link in the email and has not opened the email.

9. Click the green Create button to connect the two elements or the gray Close button to close the sidebar without connecting the two elements.

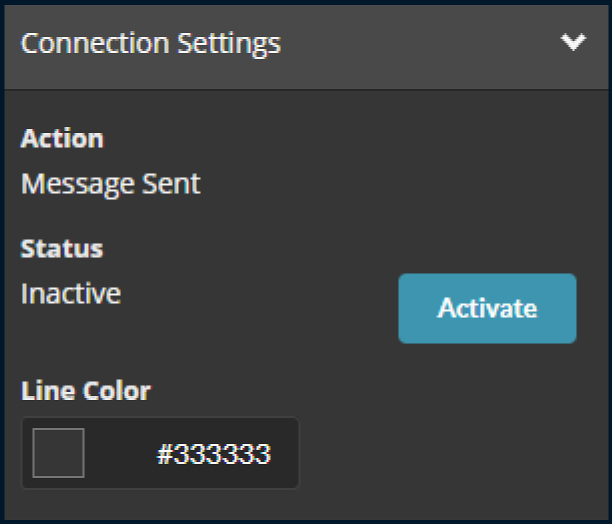


10. Once a connection has been established between the Email element and at least one other element, a textbox with the connection type will appear on the line.

11. Click on this textbox to open a new Connection Settings section in the Settings Panel.



12. Depending on the connection option you choose, there will be either three or four fields in the Connection Settings section.

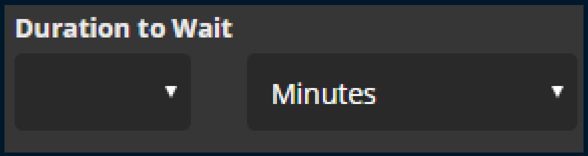


12.1. The first field is the Action field, which indicates the connection type selected (Email Opened; Email Opened, But No Links Clicked; Link Clicked; Message Sent; or No Links Clicked and Email Not Opened).

12.2. The second field is the Description field which will display a short description for when the connection will be triggered.

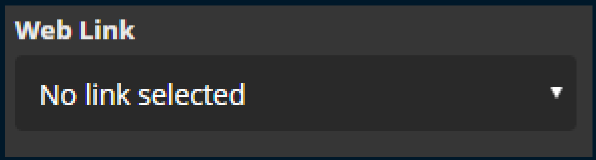
12.3. The next field is the Status field where you can activate or deactivate the connection by clicking the blue or red button respectively. Activating a connection means that the connection will be able to be used as part of the campaign and should perform as expected.

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



12.4. If you chose the "Email Opened, But No Links Clicked" or "No Links Clicked and Email Not Opened" option, the third field will be Duration to Wait. This is where you decide how long the system will wait for the email recipient to either open the email or click the link before triggering the connection. There are two dropdowns in this field, one where you choose a unit of time (minutes, hours, or days) and another where you choose the number of that time unit you want to wait. So, if you select "5" in the first dropdown and "Days" in the second dropdown, the system will wait five days for a recipient to open the email or click a link before firing the trigger.

12.5. If you chose the "Link Clicked" option, the third field will be Web Link. This is where you will select the link the recipient must click in order to fire the trigger. Only the links present in the current email will be available to choose from. Select the link to connect with this trigger from the dropdown menu provided. Alternatively, you can select "Any link clicked" from the dropdown, which means the trigger will fire if any link in the email is clicked; this trigger will only fire once.

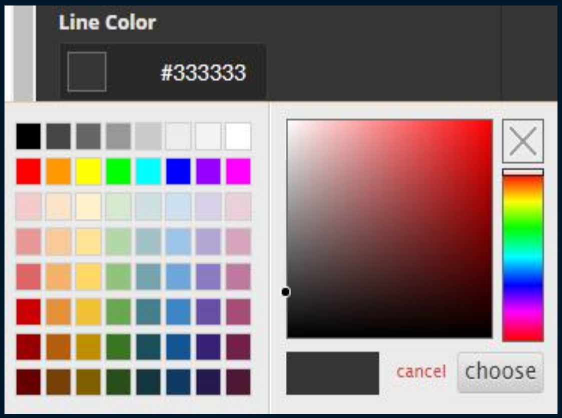


13. The final field is the Line Color field where you can choose the color for that connection's line.

13.1. **To choose a color:**

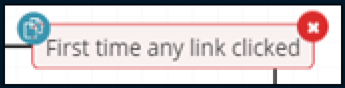
13.2. Click on the color square in the field and a color selector will appear or enter the hex code of the color in the field next to the square.

13.3. 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.

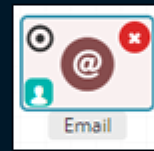


13.4. Click the Choose button at the bottom right side of the color selector to lock in your color or click Cancel to close the selector dropdown without picking a color.

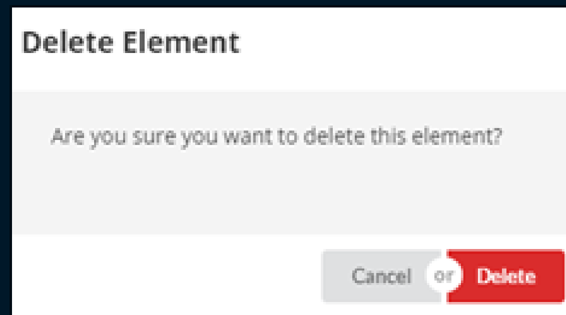
14. To copy a connection, hover your mouse over the textbox appearing on the connection to show a blue button at the top left of the textbox. Copying a connection saves you from having to re-configure the settings for any additional connections requiring the same conditions, saving time. Click and drag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



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

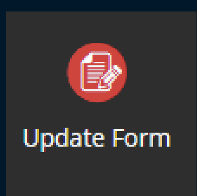


16. To delete the element from the campaign, hover your mouse over the element and click the red "X" button in the top right corner that appears. A pop-up window will appear asking you to confirm the deletion. Click the red Delete button to complete the deletion or Cancel to close the window without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

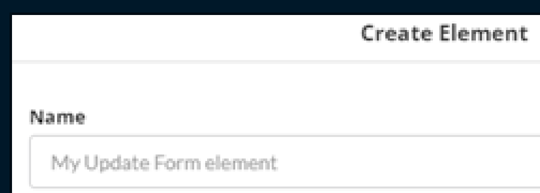
Update Form (Classic)



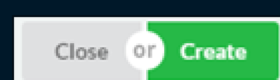
The first drag-and-drop element in the Follow-Up Forms tab is the Update Form element. This element allows you to create and send a form to your contacts when they reach a particular point in the campaign to gather updated contact information for their CRM profile.

To begin setting up this element:

1. Click and drag the Update Form 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.

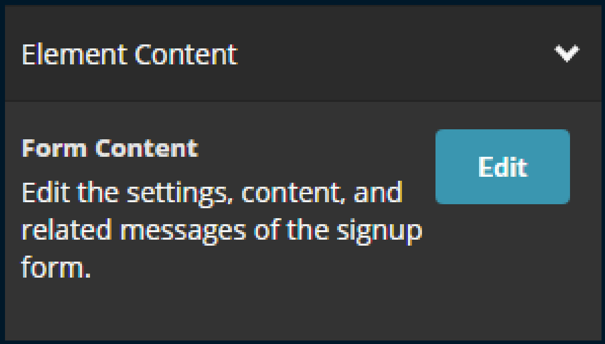


3. Click the green Create button to create the element and close the pop-up window. Or, click the gray Close button to close the window without adding an update form.



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 on the right-hand side of your screen:

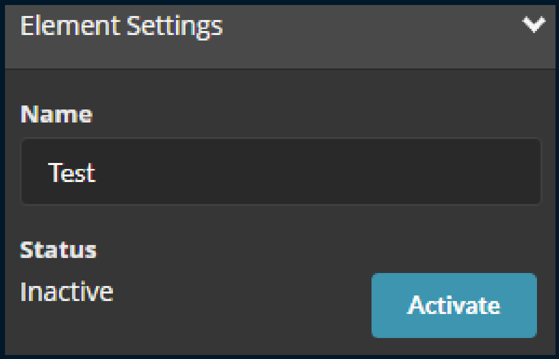
4.1. **Form Content:** Clicking the blue Edit button in the Element Content section will bring you to the Form Builder application, where you can edit the content and settings of your update form. Refer to the *SimplyCast Form Builder & Survey User Guide* for more information about creating and editing update forms.



[**Note:** One key difference in the setup of an update form is the need to configure a notification email in which the form will be sent to contacts whereas with regular forms and surveys you are provided a series of links that can be used in emails or embedded on a website. This email will contain a button to direct recipients to the update form to fill out.]

[**Note:** With the Update Form element there are no modal settings to configure like with the forms created using the Form Builder. This is because the link to the form will appear in the notification email and not on a website.]

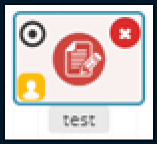
4.2. **Name:** This field contains the name you selected when you added the element to the canvas. To change the name of your element, edit the name in the textbox provided.

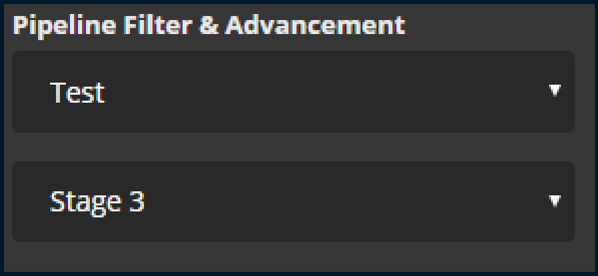


4.3. **Status:** This field is where you can activate or deactivate the element by clicking the blue or red button respectively. Activating an element means that the element will be able to be used as part of the campaign and should perform as expected.

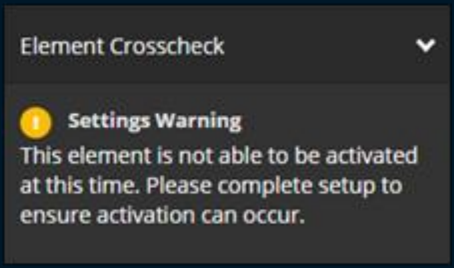
[**Note:** Keep in mind the element will not become active until you save the campaign.]

4.4. **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.

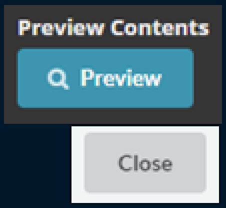




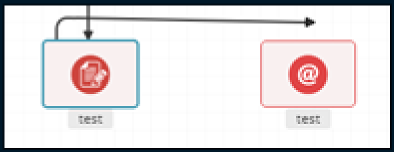
5. If there is an issue with the element that needs to be resolved before the element can be activated, there will be a yellow or red exclamation point symbol in the top right corner of the element to signify this. If this is the case, when you select the element with your mouse, an additional section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

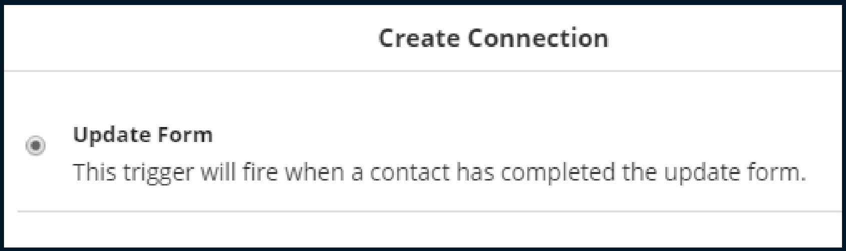


6. Once the form has been configured, you will see another field called Preview Contents. Click the blue Preview button to open a sidebar with a preview of what the update form will look like. Click the gray Close button to close the Preview sidebar.

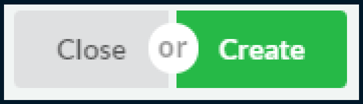


7. To connect your Update Form element to another element in your campaign, click the black target icon located on the top corner of the element and drag it over the element you wish to connect it to.

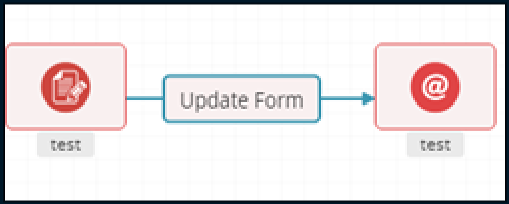




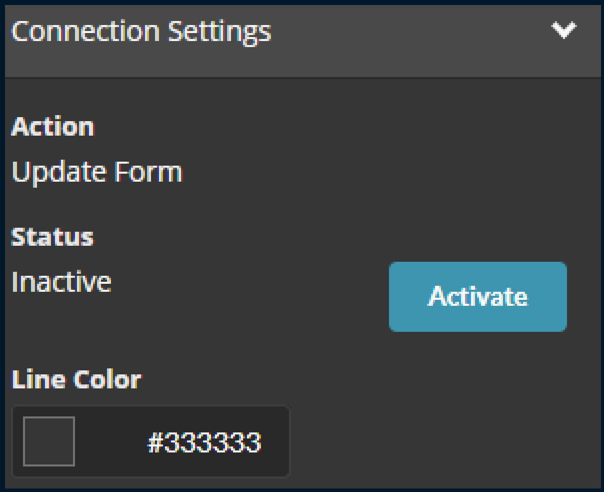
[**Note:** Some elements are not able to be connected to each other. For example, you cannot connect two Starting Point elements to each other, and you cannot connect a Starting Point element to the Contact Changed, Start from CRM, or Inbound API elements.]



8. Once a connection has been established between the Update Form 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.



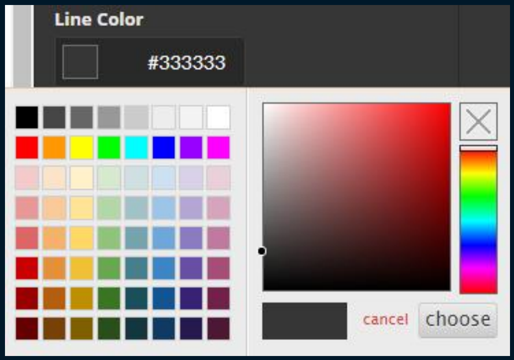
9. There are four fields in the Connection Settings section:
    9.1. The first field is the Action field, which indicates the connection type (Update Form).
    9.2. The second field is the Description field which will display a short description for when the connection will be triggered.
    9.3. The 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 that the connection will be able to be used as part of the campaign and should perform as expected.



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

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

9.5. **To choose a color:**



9.5.1. 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.

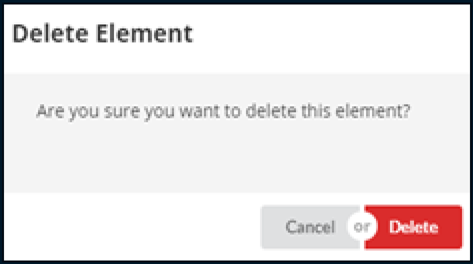
9.5.2. Choose your desired color from the pre-set swatches on the left side of the selector dropdown or use the right side to manually choose a color.

9.5.3. 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.

10. 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.

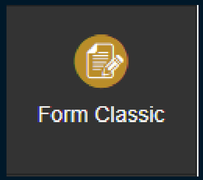
11. Delete a connection by hovering over the connection's textbox and clicking the red "X" button.

12. 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.]

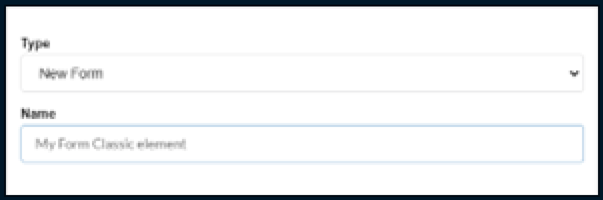
Form Classic



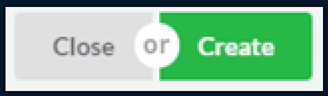
The third drag-and-drop element in the Classic tab is the Form Classic element. This element allows you to create and send a form to your contacts when they reach this point in the campaign to gather feedback or more information to add to their contact profile in the CRM.

To begin setting up this element:

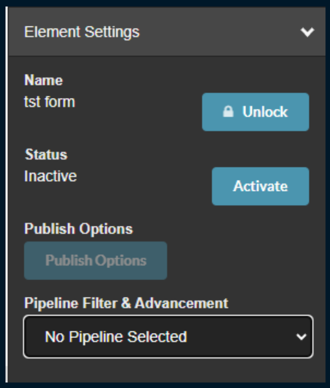
1. Click and drag the Form Classic Campaign element or double click to add the element to the canvas.
2. When you place the element, a sidebar will appear with a Name field that will ask you to enter a name for the new element. Type the name into the textbox provided. At this time, you can instead choose to use an already existing form project as well using the dropdown at the top.



3. Click the green Create button to create the element and close the pop-up window. Or, click the gray Close button to close the window without creating a Form Classic element.



4. Once you have placed the element onto the canvas and have it selected with your mouse, two additional fields will appear in the Settings Panel:
   4.1. **Element Content:** This tab contains a blue Edit button that will allow you to enter the Form Classic editor and build your form or make changes to it. For more information on building a Form Classic project, see the *SimplyCast Form Classic User Guide.*



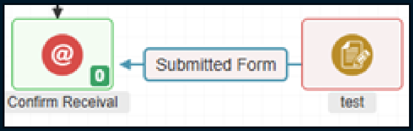
[**Note:** Keep in mind the element will not become active until you save the campaign.]

   4.2. **Element Settings:** Element settings allows you to edit the title of your Form Classic project, set it as active or inactive, access your publishing options, or add the form to a pipeline stage, allowing contacts who fill out the form to automatically be placed into that pipeline and stage.

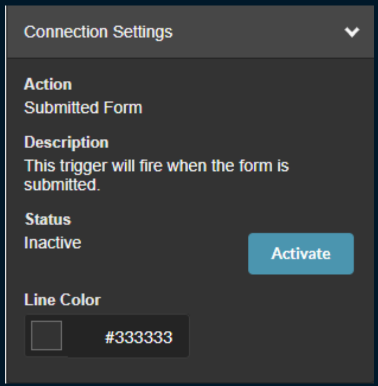
5. Once you have configured your Form Classic element, it's time to look at the connection settings. You can connect your Form Classic project to other elements on the workspace by mousing over the element, then clicking and dragging on the black circle and releasing the mouse button once the connection has been made visually.

[**Note:** Some elements are not able to 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 Form Classic Campaign 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.



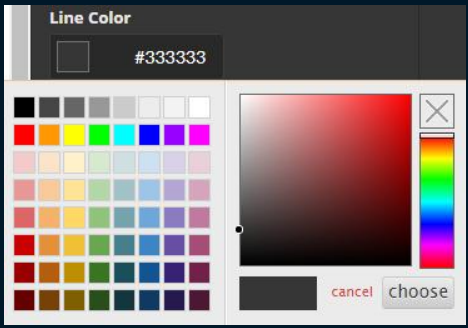
7. You will see two tabs containing settings here:
    7.1. The first will be Connection Reporting, which tells you how many interactions have passed through that connection.
    7.2. The second tab is Connection Settings. There are four fields in the Connection Settings section. The first field is the Action field, which indicates how the contact progresses. This will say Submitted Form for Form Classic.



8. The second field is the Description field which will display a short description for the Action, explaining when the connection will be triggered.
9. 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 that the connection will be able to be used as part of 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 Color field where you can choose the color for that connection's line.
11. **To choose a color:**

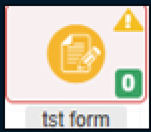


    11.1. Click on the color square in the field and a color selector will appear or enter the hex code of the color in the field next to the square.

    11.2. 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.

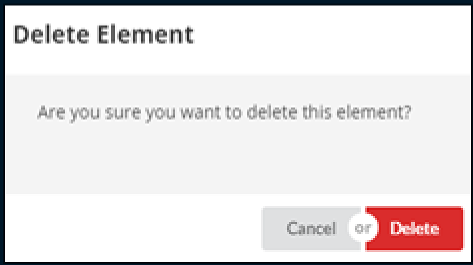
    11.3. Click the Choose button at the bottom right side of the color selector to lock in your color or click Cancel to close the selector dropdown without picking a color.

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 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.



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. 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.]