SimplyCast

Powering Automation, Igniting Growth for Smarter Connections

SimplyCast 360

Automation Flow Editor Creation Contact Relationship User Guide

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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:

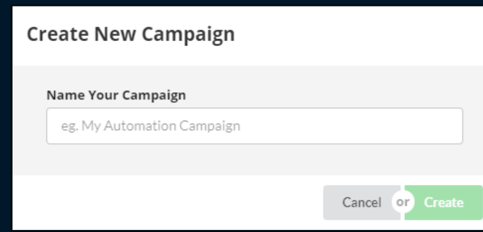
1. **Element:** An element is one of the various tools or communication channels that users can drag and drop onto the canvas and configure as part of a SimplyCast 360 campaign.
2. **Connection:** A connection is a rule or condition that tells an element how a contact should interact with it when they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

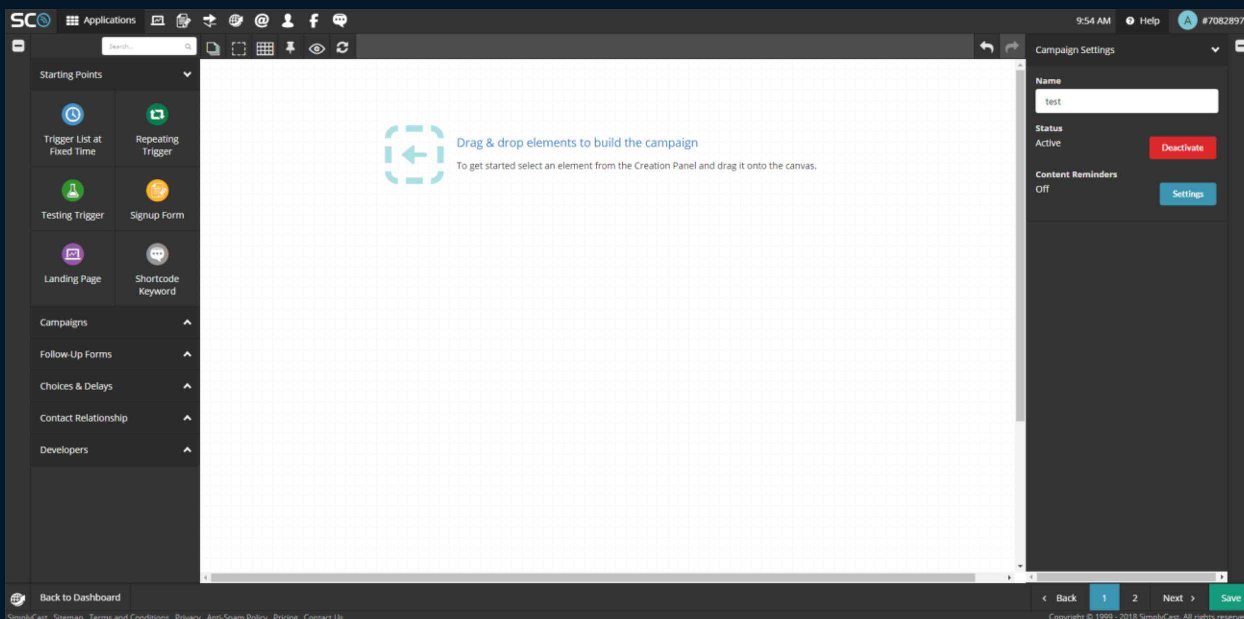
[**Note:** Refer to the *SimplyCast 360 Glossary Guide* for more key terms and definitions.]

To access the SimplyCast Automation Flow Editor:

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

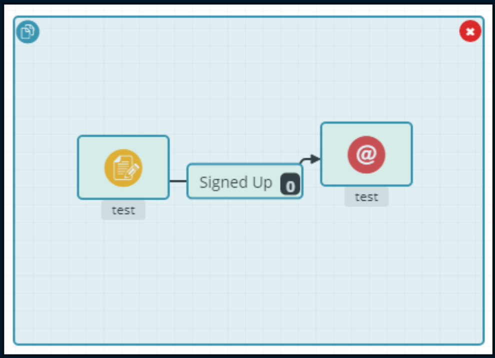
2. A pop-up will appear where you will be asked to name the campaign. Type the name into the textbox provided.
3. Click the green Create button to create the campaign, close the sidebar, and be redirected to the Automation Flow Editor.
   3.1. Or click Cancel to close the pop-up without creating a campaign.





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.

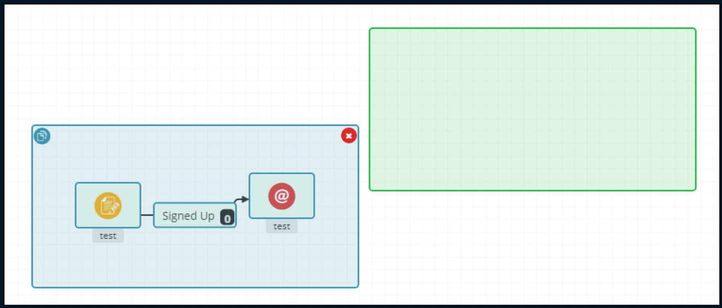


You are also able to highlight a section on the canvas containing multiple elements.

To do this:

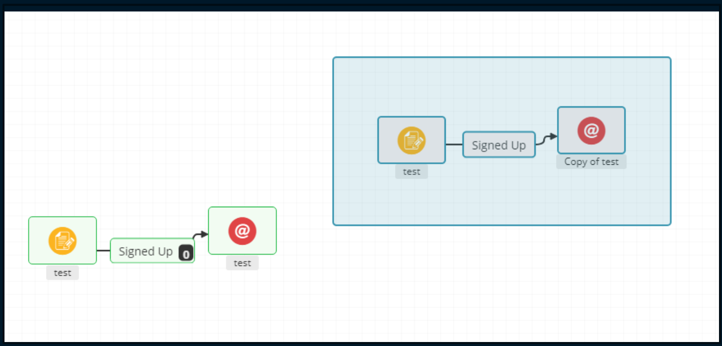
1. Click and hold the mouse down on a blank section of the canvas and drag the mouse to create a blue box.
2. Drag the mouse until the blue box covers all the elements you want highlighted, then release the mouse.

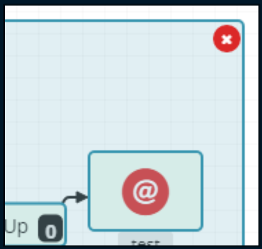
When you hover your mouse over a highlighted section of the canvas, you will see two new icons appear in the top corners of the blue box. On the left is a Copy All Selected icon, which allows you to create a second copy of the highlighted section in the canvas.



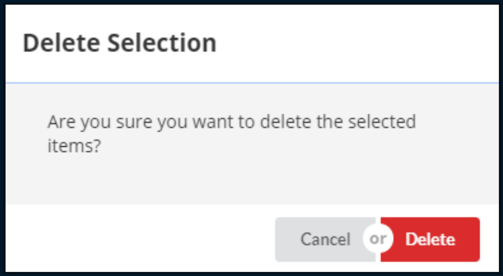
To do this:

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.



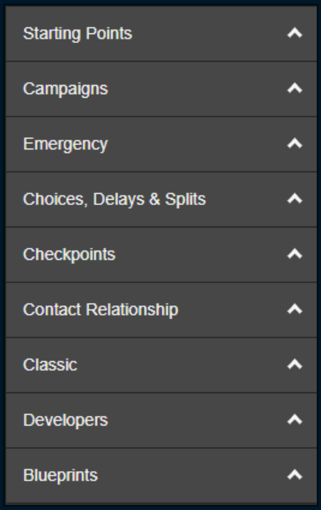


1. The red "X" icon on the top right corner is used to delete the highlighted section of your campaign. When you hover your mouse over the highlighted section, this red "x" icon will appear. Click the icon, and a pop-up will appear asking you to confirm your deletion. Click the red Delete button to confirm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



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

Creation Panel



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

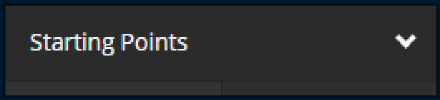
To add a SimplyCast 360 element to your campaign, either drag and drop the icon into the canvas or double-click the icon. There are nine different tabs of elements you can choose from.

These are:

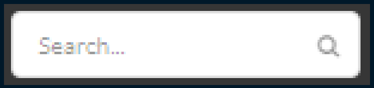
1. **Starting Points:** These elements can be used as a jumping-off point in creating the SimplyCast 360 campaign.
2. **Campaigns:** These elements are the different types of messages that can be sent to project contacts and can be set up and customized in their respective editors.

3. **Emergency:** These elements are part of SimplyCast's emergency suite of tools, which can send out notifications quickly and efficiently in an emergency.
4. **Choices, Delays & Splits:** These elements can be used to create rules to determine when the next part of the SimplyCast 360 campaign will interact with contacts, which contacts it will interact with, and how they will interact.
5. **Checkpoints:** These elements allow you to create and trigger checkpoints at specific points in the campaign where contacts can return if actions are taken/not taken.
6. **Contact Relationship:** These elements allow the system to perform actions within the CRM. These could include updating a contact profile and waiting on a CRM task.
7. **Classic:** These elements are older versions of current elements still supported in the SimplyCast application.
8. **Developers:** These elements can bring information, such as contact data, into the system from an external source or push this data out from the system to an external source.
9. **Blueprints:** These elements incorporate blueprint instances into your campaign. See the SimplyCast Blueprint Core User Guide and its associated documents for more information.

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



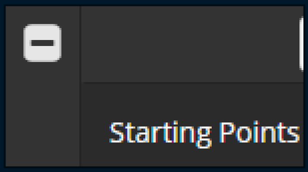
To open a tab in the Creation Panel, click on the tab name you want to open. The tab will expand to display the elements within that tab. To close the tab, click the tab name again.



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

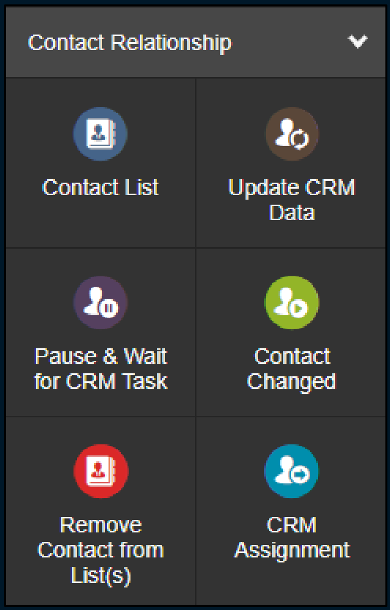
Once you find the element you're looking for, either double-click or drag-and-drop it into the canvas to add it to your campaign or double-click to add it to the canvas.

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



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

Contact Relationship

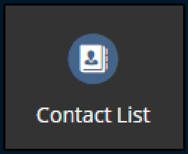


The next tab in the Creation Panel on the left side of the screen is the Contact Relationship tab. The elements appearing in this tab allow you to manage and complete tasks using the CRM.

These elements are:

1. **Contact List:** This element allows you to place contacts into lists based on actions they have performed, input they submitted earlier in the campaign, or by simply reaching a point.
2. **Update CRM Data:** This element allows you to update CRM profile data when contacts reach this point in the campaign.
3. **Pause & Wait for CRM Task:** This element allows you to pause your SimplyCast 360 campaign for administrative intervention.
4. **Contact Changed:** This element allows you to trigger contacts to be sent through a campaign whenever a contact’s metadata, CRM data, or the lists they’re on are modified.
5. **Remove Contact from List(s):** This element allows you to remove contacts from one or more CRM lists based on actions they have performed or input they submitted earlier in the campaign.
6. **CRM Assignment:** This element allows you to assign incoming contacts to a CRM list or account manager according to a configured ruleset.

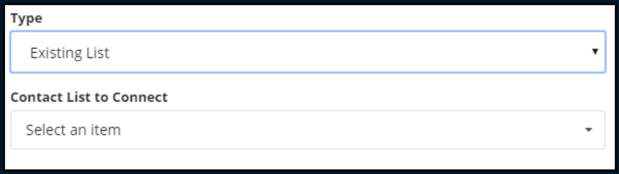
Contact List



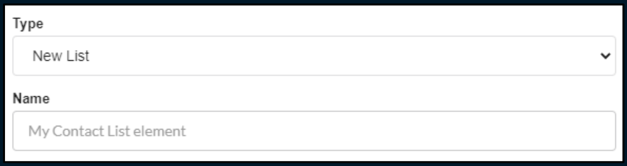
The Contact List element is the first drag-and-drop element in the Contact Relationship tab. It allows you to organize contacts into lists based on their actions or input submitted earlier in the campaign.

To begin setting up this element:

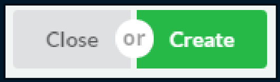
1. Click and drag the Contact List element or double click it to add it to the canvas.
2. When you place the element, a sidebar will appear with two fields. The first field will ask you to choose a list type from the dropdown menu in the Type field: either a new contact list or an existing list.
   - **2.1.** If you use an existing contact list, a new field will appear to select an existing list to add contacts to. Begin typing the name of the existing list you'd like to use, and the dropdown list will automatically filter. Once you see the list you would like to use, click the list's name to select it.



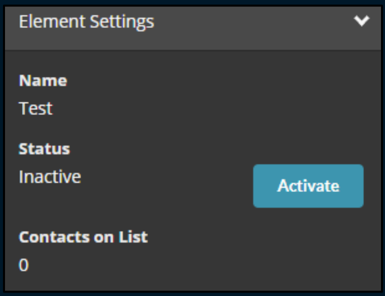
   - **2.2.** If you create a new list, the second field will ask you to enter a name for the new Contact List element. Type the name into the textbox provided.



3. Click the green Create button at the bottom of the sidebar to create the new element or click the gray Close button to close the sidebar without creating the new 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 Element Settings section on the right-hand side of your screen:



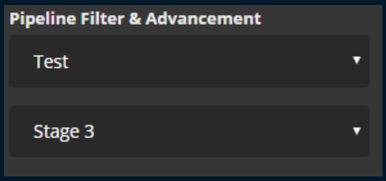
   - 4.1. **Name:** This field contains the name of the contact list you added, which cannot be changed from here.
   - 4.2. **Status:** This field is where you can activate or deactivate the element by clicking the blue or red button, respectively. Activating an element means that

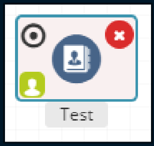
the element will be able to be used as part of the campaign and should perform as expected.

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

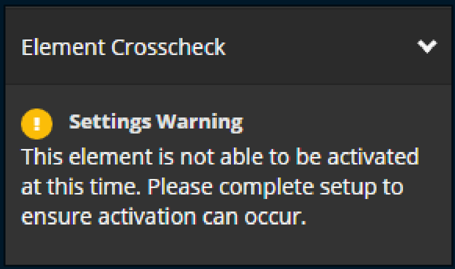
4.3. **Contacts on List:** This field will show the number of contacts on the list associated with this element.

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





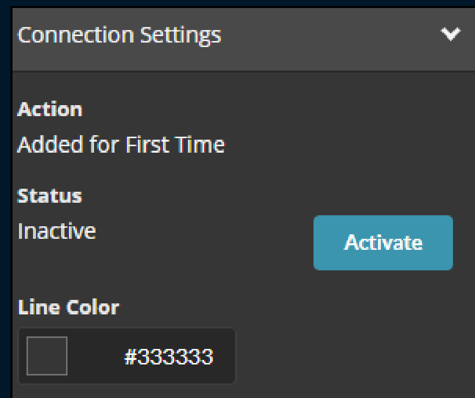
5.1. If an issue with the element needs to be resolved before it can be activated, a yellow or red exclamation point symbol will appear in the top right corner of the element to signify this. If this is the case, when you select the element with your mouse, an additional section called Element Crosscheck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



5.2. To connect your Contact List element to another element in your campaign, click the black target icon in the top corner and drag it over to the element you wish to connect.

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

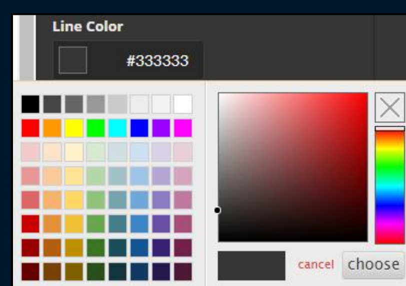
6. Once a connection has been established between the Contact List element and at least one other element, a textbox with the connection type will appear on the line. Click on this textbox to open a new Connection Settings section.



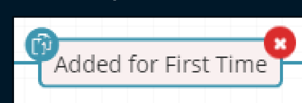
   6.1. The first field is the Action field, which indicates the connection type (Added for First Time).
   6.2. The second field is the Description field, which briefly describes when the connection will be triggered.
   6.3. The next field is the Status field, where you can activate or deactivate the connection by clicking the blue or red button, respectively. Activating a connection means that it can be used as part of the campaign and should perform as expected.

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

7. The last field is the Line Color field where you can choose the color for that connection's line. **To select a color:**



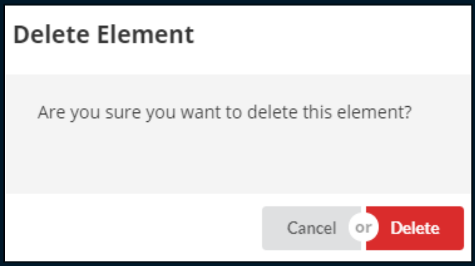
   7.1. Click on the color square in the field, and a color selector will appear, or enter the hex code of the color in the field next to the square.
   7.2. Choose your desired color from the pre-set swatches on the left side of the selector dropdown or use the right side to choose a color manually.
   7.3. 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.



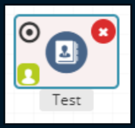
8. To copy a connection, hover your mouse over the textbox appearing on the connection to show a blue button at the top left of the textbox. Copying a connection saves you time by preventing you from having to reconfigure the

settings for any additional connections requiring the same conditions. Click and drag this button to create a new connection attached to a new element. All connection settings configured in the initial connection will be copied over to the new connection.

9. To delete a connection, hover over its textbox and click the red “X” button.



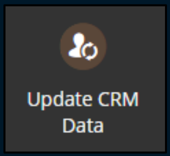
9.1. To delete an element from the campaign, hover your mouse over it and click the red “X” button in the top right corner. A pop-up window will appear asking you to confirm the deletion. Click the red Delete button to complete the deletion or cancel to close the window without deleting the element.



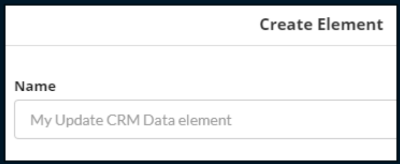
[**Note:** You will only receive the confirmation pop-up if the element has been activated or the campaign has been saved.]

Update CRM Data

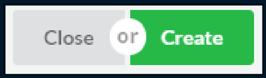
The second drag-and-drop element in the Contact Relationship tab is the Update CRM Data element. This element allows you to update CRM profile data when contacts reach this point in the campaign.



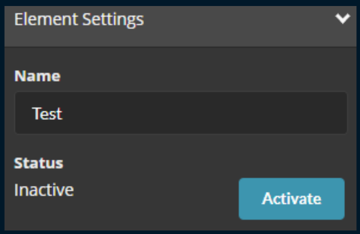
To begin setting up this element:



1. Click and drag the Update CRM Data element or double click to add it to the canvas.
2. When you place the element, a sidebar will appear where you will be asked to enter a name for the new element. Type the name into the textbox provided.
3. Click the green Create button to create the new element or click the gray Close button to close the sidebar without creating the new element.



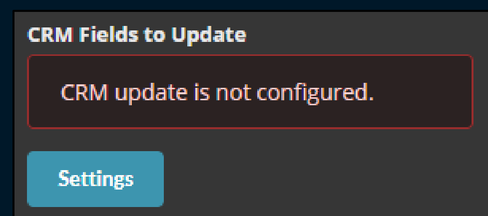
4. Once you have placed the element onto the canvas and have it selected with your mouse, four additional fields will appear in the Element Settings section on the right-hand side of your screen:



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.

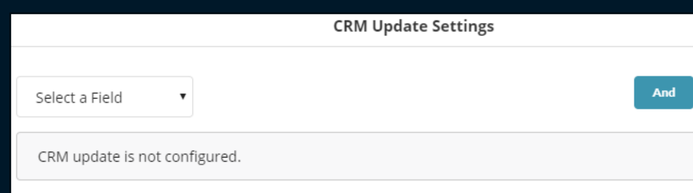
4.2. **Status:** This field is where you can activate or deactivate the element by clicking the blue or red button, respectively. Activating an element means that the element will be able to be used as part of the campaign and should perform as expected.

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



4.3. **CRM Fields to Update:** This field is where you must determine what contact information is updated whenever contacts reach the Update CRM Data element in the campaign.

4.4. **To configure these settings:**



4.4.1. Click the blue Settings button to open a CRM Update Settings sidebar.

4.4.2. A drawer will open, displaying the settings for Update CRM Data. To start, you will be asked to choose a source. The source is the data being updated in the CRM. You will need to choose either CRM Field or Metadata. After that, you will select a field and then assign an action. These actions depend on the field selected, but will be one of the following:

Clear (Or some variation of)	Set To/Set To (Concatenate)	Add
Subtract	Remove From	True
False		

The Actions perform the following functions:

- **Clear (And Variations):** Clear actions will erase information from the specified CRM column or Metadata field.
- **Set To:** This Action will set the field to a valid value.

- **Set To (Concatenate):** This will set the field to a specific value and combine it with another field. For example, you could add the phone number field to the contact's extension to the end of the number.
- **Add:** This Action will add the specified number to the existing value in the designated field.
- **Subtract:** This Action will subtract the specified number from the existing value in the designated field.
- **Remove From:** This Action will remove the contact from a particular field, collection of contacts, or pipeline.
- **True:** This will set a Boolean value of True
- **False:** This will set a Boolean value of False.

[**Note:** The names of any pipelines you have created will also appear in this dropdown menu. In subsequent steps in this section, with the addition of new fields in the sidebar, options that are available with any pipeline selection are noted as being available with "Pipelines."]

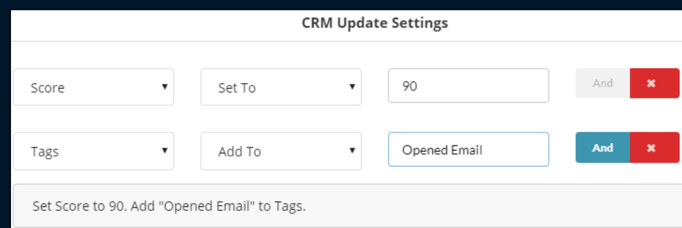
[**Note:** If the contact does not have the value input in the chosen CRM data type field, the system will disregard this Update CRM Data element task.]

- **Clear:** This option is available with the Tags, Ad Source, Ad Medium, Ad Campaign, Ad Content, Search Term, Site Category, and Alternate Contact fields. Choosing this option will automatically erase any data in the selected data type field in the contact's CRM profile.
- **Add:** This option is available with the Score, Acquisition Cost, Potential Value, and Purchase Amount fields. Choosing this option will cause a new field to appear in the sidebar where you can type in the value added to the contact's CRM profile for the selected data type.
- **Subtract:** This option is available with the Score, Acquisition Cost, Potential Value, and Purchase Amount fields. Choosing this option will cause a new field to appear in the sidebar where you are able to type in a value that will be subtracted from the contact's CRM profile in the chosen data type.

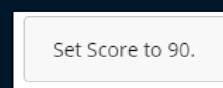
- **Clear Manager:** This option is available with the Account Manager field. It automatically removes any Account Manager data from the chosen data type in the contact's CRM profile.

1. Once you have chosen one of the above options, fill in the appropriate information as required if a third Value field or pop-up appears.

   1.1. You can create an additional condition for updating the CRM by clicking the blue And button in the sidebar underneath your primary update. Once clicked, a new field will appear below the button where you can create a new update to be used along with the first. Continue to click the And button to make as many CRM updates as you want.

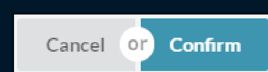


   1.2. A textbox at the bottom of the sidebar will describe your configured CRM update(s).

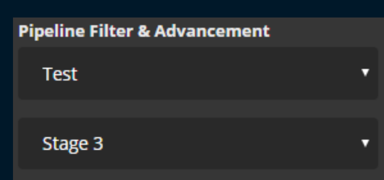


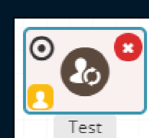
   1.3. To delete any CRM updates that have been configured (if multiple have been configured), click the red "X" button on the right-hand side of the configured update you wish to delete.

   1.4. Click the blue Confirm button to save your CRM update(s) changes and close the sidebar. Or, click the gray Cancel button to close the window without saving your changes.

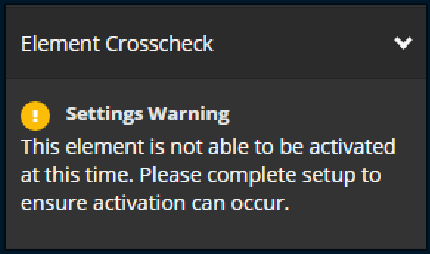


2. **Pipeline Filter & Advancement:** Choose whether you would like contacts to progress through any pipelines you may have associated with the campaign. In the dropdown menu in this field, choose the pipeline to which you would like contacts to be added. A second dropdown will appear to select the stage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

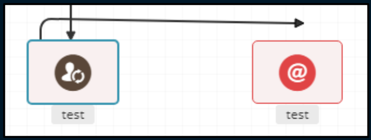




2.1. If an issue with the element needs to be resolved before it can be activated, a yellow or red exclamation point symbol will appear in the top right corner of the element to signify this. If this is the case, when you select the element with your mouse, an additional section called Element Crosscheck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

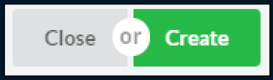


2.2. To connect your Start from CRM element to another element in your campaign, click the black target icon in the top corner and drag it over to the element you wish to connect.

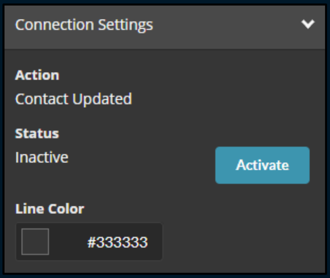


[**Note:** Some elements cannot be connected. For example, you cannot connect two Starting Point elements, and you cannot connect a Starting Point element to the Contact Changed, Start from CRM, or Inbound API elements.]

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



3.1. Once a connection has been established between the Update CRM Data 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.

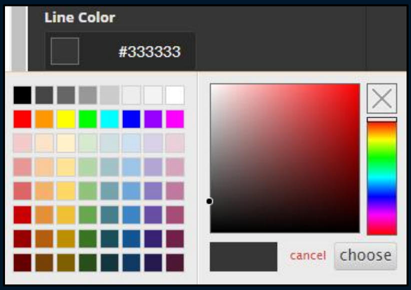


3.1.1. The first field is the Action field, which indicates the connection type (Contact Updated).

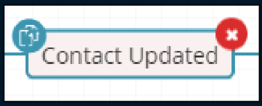
3.1.2. The second field is the Description field, which will display a short description of when the connection will be triggered.

3.1.3. The following 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 it will be able to be used as part of the campaign and should perform as expected.

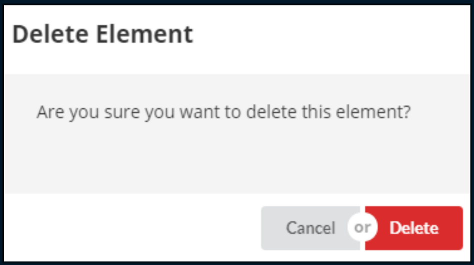
[**Note:** Remember the connection will not become active until you save the campaign.]



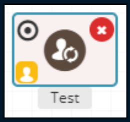
4. The last field is the Line Color field where you can choose the color for that connection's line. **To select a color:**
   4.1. Click on the color square in the field, and a color selector will appear, or enter the hex code of the color in the field next to the square.
   4.2. Choose your desired color from the pre-set swatches on the left side of the selector dropdown or use the right side to choose a color manually.
   4.3. 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.



5. 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 attached to a new element. All connection settings configured in the initial connection will be copied over to the new connection.

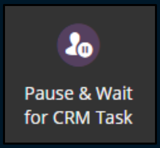


   5.1. Delete a connection by hovering over the connection's textbox and clicking the red "X" button.
   5.2. To delete the element from the campaign, hover your mouse over the element and click the red "X" button that appears in the top right corner. A pop-up window will appear asking you to confirm the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



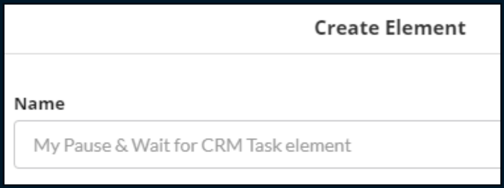
[**Note:** You will only receive the confirmation pop-up if the element has been activated or if the campaign has been saved.]

Pause & Wait for CRM Task

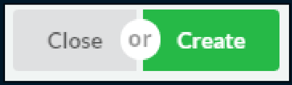


The next drag-and-drop element in the Contact Relationship tab is the Pause & Wait for CRM Task element. This element allows you to pause your SimplyCast 360 campaign for administrative intervention.

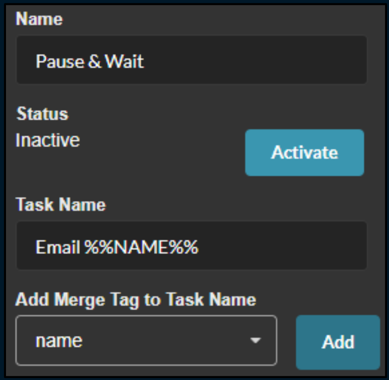
To begin setting up this element:



1. Click and drag the Pause & Wait for CRM Task element or double click to add it to the canvas.
2. When you place the element, a sidebar will appear where you will be asked to enter a name for the new element. Type the name into the textbox provided.
3. Click the green Create button to create the new element or click the gray Close button to close the sidebar without creating the new element.



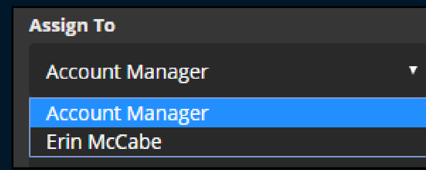
4. Once you have placed the element onto the canvas and have it selected with your mouse, additional fields will appear in the Element Settings section on the right-hand side of your screen:



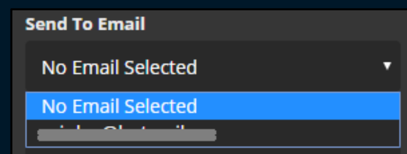
   4.1. **Name:** This field contains the name you selected when you added the element to the canvas. To change the name of your element, edit the name in the textbox provided.
   4.2. **Status:** This field is where you can activate or deactivate the element by clicking the blue or red button respectively. Activating an element means that the element will be able to be used as part of the campaign and should perform as expected.
   4.3. **Task Name:** This field allows you to add a name to the tasks generated by the system. The task name will appear as the subject of the email to the account manager. Enter the name into the text box provided. By default the task will be given the same name as the Pause & Wait for CRM Task element.
   4.4. **Add Merge Tag to Task Name:** This field lets you personalize the task name by adding a merge tag. Select the merge tag you would like to add from the dropdown menu available and click the blue Add button to add it to the Name field.

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

4.5. **Assign To:** This option contains an Account Manager dropdown menu where you can choose a user on your account to be responsible for ensuring the designated CRM task is complete and the campaign is restarted for the contact.

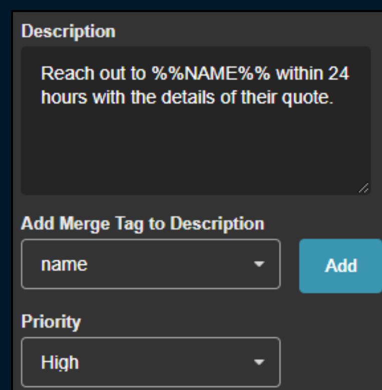


4.6. **Send to Email:** This field contains a dropdown menu with the available sender email addresses to choose from that will send an email to a designated sender address available in the SimplyCast account to alert them of the task that requires their attention.



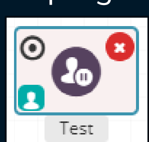
4.7. **Description:** This field contains a textbox where you can type out a description of the task the recipient must complete before manually restarting the campaign.

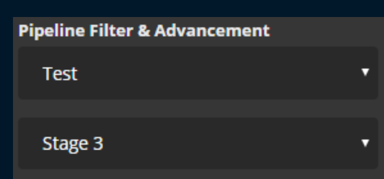
4.8. **Add Merge Tag to Description:** This field lets you personalize the task description by adding a merge tag. Select the merge tag you would like to add from the dropdown menu available and click the blue Add button to add it to the Description field.



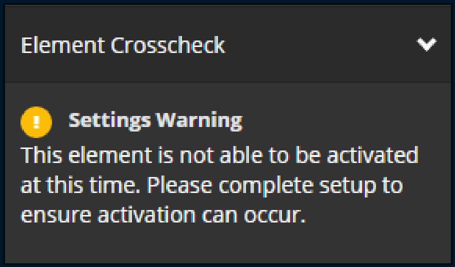
4.9. **Priority:** This field allows you to set the task's priority in the CRM. Choose the task's priority level from the dropdown menu (Low, Normal, or High).

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





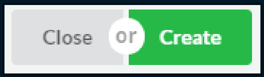
5.1. If an issue with the element needs to be resolved before it can be activated, a yellow or red exclamation point symbol will appear in the top right corner of the element to signify this. If this is the case, when you select the element with your mouse, an additional section called Element Crosscheck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



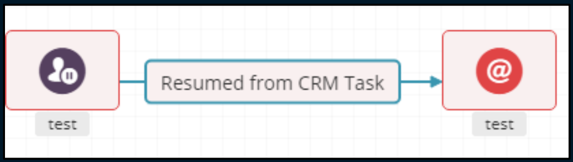
5.2. To connect your Pause & Wait for CRM Task element to another element in your campaign, click the black target icon located in the top corner of your element and drag it over to the element you wish to connect it to.

[**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.]

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

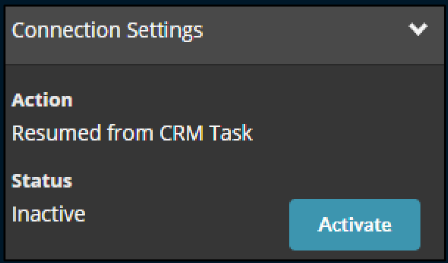


6. Once a connection has been established between the Pause & Wait for CRM Task element and at least one other element, a textbox with the connection type will appear on the line. Click on this textbox to open a new Connection Settings section in the Settings Panel.



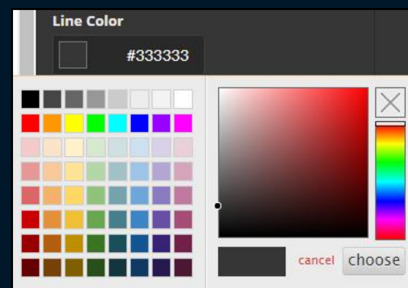
6.1. The first field is the Action field, which indicates the connection type (Resumed from CRM Task).

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



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 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.]

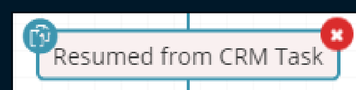


7. The last field is the Line Color field where you can choose the color for that connection's line. **To choose a color:**

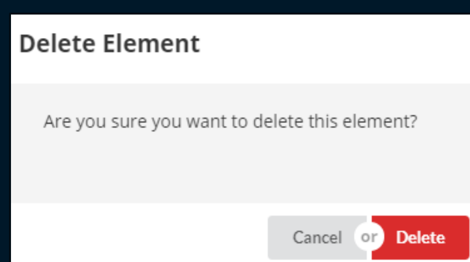
7.1. Click on the color square in the field, and a color selector will appear, or enter the hex code of the color in the field next to the square.

7.2. 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.

7.3. 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.

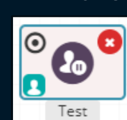


8. To copy a connection, hover your mouse over the textbox appearing on the connection to show a blue button at the top left of the textbox. Copying a connection saves you from having to reconfigure the settings for any additional connections requiring the same conditions, saving time. Click and drag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



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

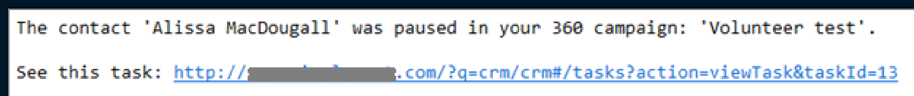
9.1. To delete the element from the campaign, hover your mouse over the element and click the red "X" button in the top right corner that appears. A pop-up window will appear asking you to confirm the deletion. Click the red Delete button to complete the deletion or Cancel to close the window without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

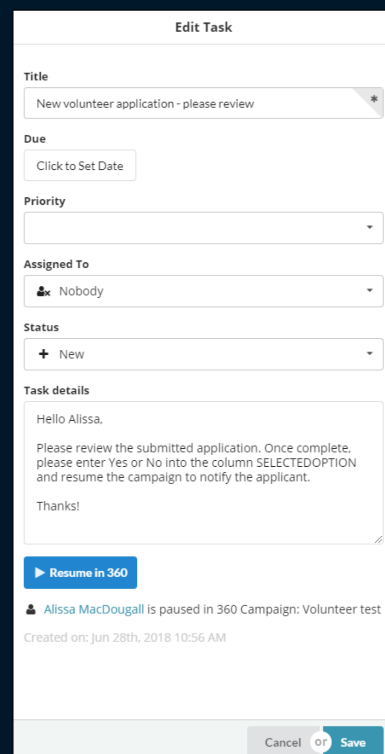


[**Note:** You will only receive the confirmation pop-up if the element has been activated or if the campaign has been saved.]

Completing a Pause & Wait for CRM Task

Once a contact has reached the Pause & Wait for CRM Task element in the 360 campaign, the user selected as the campaign's account manager will receive an email. This email will indicate that a new contact has been paused in the campaign and requires action before resuming their journey. It will include a link to the CRM that the designated SimplyCast account user must complete.

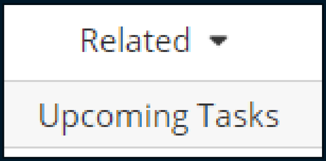




From here, the designated SimplyCast account user must:

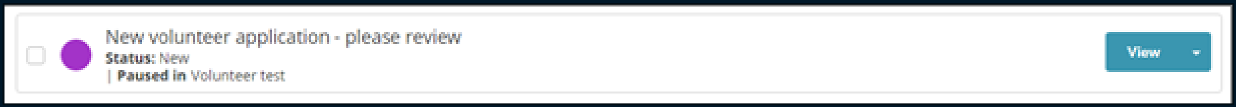
1. Click the link in the task notification email to be directed to SimplyCast CRM’s Tasks section, where they can view the task details in a sidebar.
2. Review the task. There are three fields in the task sidebar to pay particular attention to:
   2.1. **Task Details:** The message created in the Description field in the Settings Panel for the Pause & Wait for CRM Task element in the SimplyCast 360 campaign. This field will provide the account manager with instructions to complete the task.
   2.2. **Resume in 360:** Once the task has been completed, a blue button will be clicked to resume the contact’s journey through the SimplyCast 360 campaign.
   2.3. **Contact Icon:** Below the Resume in 360 button, there is an icon of a person and a hyperlink of their name. Click the name to be taken to the profile.
3. When the task has been completed and the contact resumes in the SimplyCast 360 campaign, click the blue Save button at the bottom of this sidebar to close it, or click Cancel to close it without saving any changes.

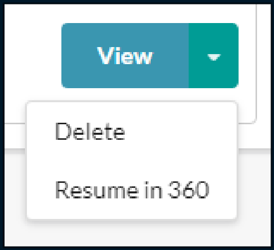
4. **To resume a contact in SimplyCast 360 from a contact profile page:**



   4.1. In a contact's profile, locate and click the Related tab at the top of the screen and select Upcoming Tasks from the drop-down menu that appears.

   4.2. Locate the name of the task you would like to complete for the contact and click the arrow next to the blue View button.



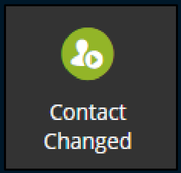


   4.3. Select the Resume in 360 option from the dropdown menu.

   4.4. A message will appear saying Task Resumed to confirm the contact has been accurately resumed.

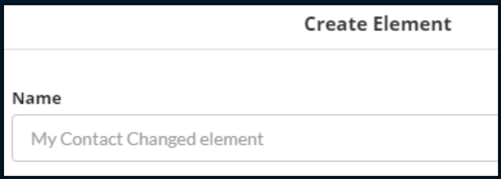
[**Note:** Refer to the *SimplyCast CRM User Guide* to learn more about Tasks.]

Contact Changed

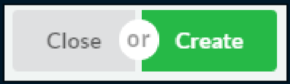


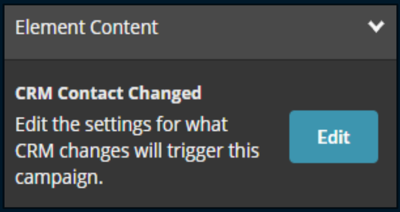
The Contact Changed element is the next drag-and-drop element in the Contact Relationship tab. This element allows you to trigger contacts sent through a campaign whenever a pre-determined information field in the contact's CRM profile is modified.

To begin setting up this element:

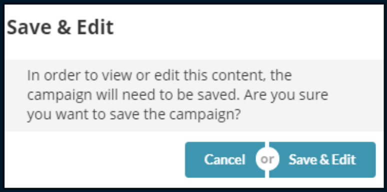


1. Click and drag the Contact Changed element or double click to add it to the canvas.
2. When you place the element, a sidebar will appear where you will be asked to enter a name for the new element. Type the name into the textbox provided.
3. Click the green Create button to create the new element or click the gray Close button to close the sidebar without creating the new element.

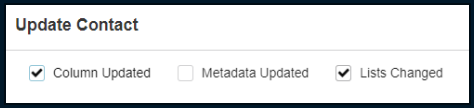




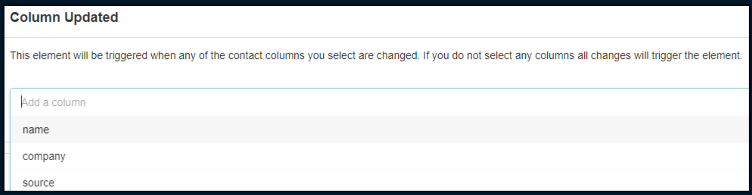
4. Once you have placed the element onto the canvas and have it selected with your mouse, four additional fields will appear in the Settings Panel on the right-hand side of your screen:
   4.1. **CRM Contact Changed:** Clicking the blue Edit button in this field will produce a pop-up window asking you to save your progress before being redirected to the Contact Changed Configuration page.



Click the blue Save & Edit button to save your campaign and be redirected or click Cancel to close the pop-up window without configuring the Contact Changed element. On the configuration page, you can select what CRM information needs to change to trigger the element in the campaign. The Contact Changed Configuration page contains four sections:

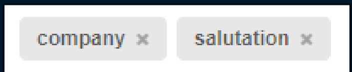


4.1.1. **Update Contact:** In this section, choose the type of CRM data that must be changed to trigger the element. Your options are Column Updated (a column in the CRM has been updated with new information), Metadata Updated (a piece of a contact's interaction data, such as Email Clicks, has been updated), and Lists Changed (one or more contacts have been added or removed from a selected contact list). Choose one, two, or all three options if you'd like.



4.1.2. **Column Updated:** If you chose the Column Updated option in the Update Contact section, you must determine which CRM columns will trigger the element when changed. If you don't select specific columns, then any changes made to any columns will trigger the element.

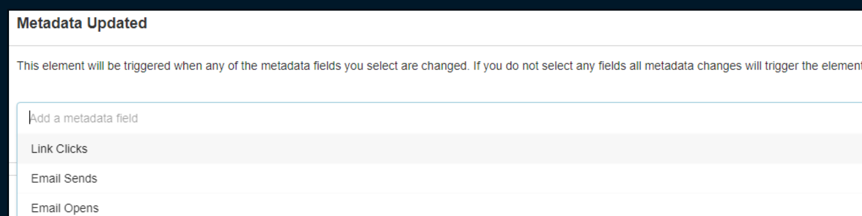
5. **To choose one or multiple CRM columns:**
   5.1. Click the dropdown menu in the Column Updated field. The dropdown will contain all the columns in your CRM, including any custom columns that have been created.



   5.2. Select as many CRM columns as you like from the dropdown. Selected columns will appear in boxes below the dropdown and can be removed by clicking the small "X" icon beside the name of the column you wish to deselect.

5.3. Scroll down the list in the dropdown to find more columns that can be displayed at once or type the name of the specific column you want to find. The list will filter as you type.

5.4. **Metadata Updated:** If you chose the Metadata Updated option in the Update Contact field, you will now need to choose what specific piece of CRM metadata will trigger the element when it is changed. If you don't choose a specific piece of metadata, then any changes made to any pieces of metadata will trigger the element.

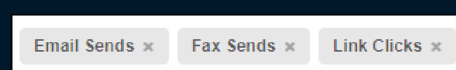


6. **To choose one or multiple pieces of metadata:**

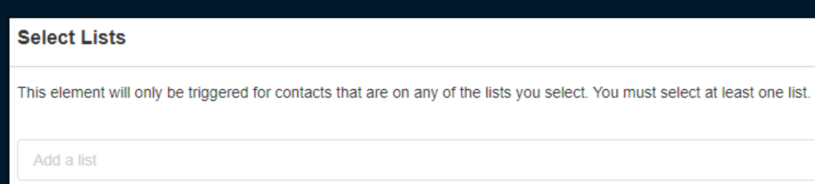
6.1. Click the dropdown menu in the Metadata Updated field. The dropdown will list all metadata options available.

6.2. Select as many pieces of CRM metadata as possible from the dropdown. Selected metadata will appear in boxes below the dropdown and can be removed by clicking the small "X" icon beside the metadata name you wish to deselect.

6.3. Scroll down the list in the dropdown to find more metadata options that can be displayed at once or type the name of the specific CRM metadata you want to see. The list will filter as you type.



7. **Select Lists:** If you chose the Lists Changed option in the Update Contact field, you will now need to choose which contact lists in the CRM will trigger the element when changed.



To do so:

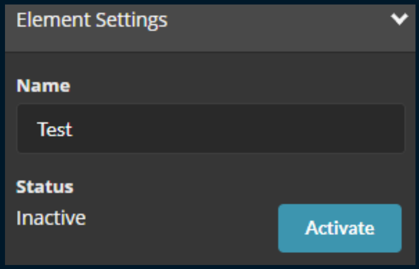
7.1. Click the dropdown menu in the Select Lists field. The dropdown will list all the available contact lists in your CRM.

7.2. Select as many lists as you like from the dropdown. Selected lists will appear in boxes below the dropdown and can be removed by clicking the small “X” icon beside the name of the lists you wish to deselect.

7.3. Scroll down the list in the dropdown to find more lists that can be displayed at once, or type the name of the specific lists you want to find. The list will filter as you type.

[**Note:** Once you have selected the CRM data that will trigger the element when changed, click the blue Next button to return to the Automation Flow Editor. Using the Contact Changed on its own will trigger if the selected column/metadata is changed to anything. You can use a Decision element to specify what column/metadata should be changed to trigger the Contact Changed element.]

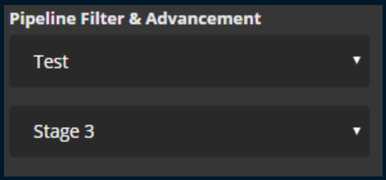
7.4. **Name:** This field contains the name you selected when you added the element to the canvas. To change the name of your element, edit the name in the textbox provided.

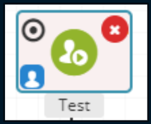


7.5. **Status:** This field is where you can activate or deactivate the element by clicking the blue or red button, respectively. Activating an element means that the element will be able to be used as part of the campaign and should perform as expected.

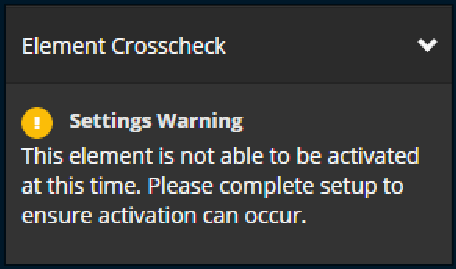
[**Note:** Remember the element will not become active until you save the campaign.]

8. **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 to which you would like contacts to be added. A second dropdown will appear to select the pipeline stage to which the 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 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.

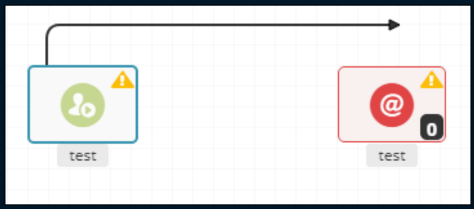




9. If there is an issue with the element that needs to be resolved before the element can be activated, there will be a yellow or red exclamation point symbol in the top right corner of the element to signify this. If this is the case, when you select the element with your mouse, an additional section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

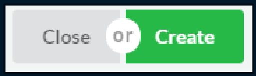


10. To connect your Contact Changed element to another element in your campaign, click the black target icon on the top corner and drag it over to the element you wish to connect it to.

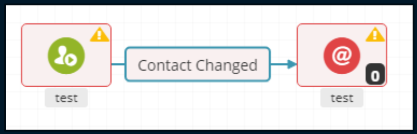


[**Note:** Some elements cannot be connected to each other. For example, you cannot connect two Starting Point elements to each other, and you cannot connect a Starting Point element to the Contact Changed, Start from CRM, or Inbound API elements.]

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

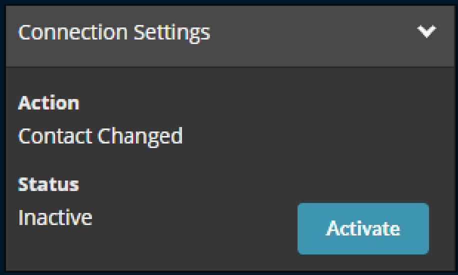


10.2. Once a connection has been established between the Contact Changed element and at least one other element, a textbox with the connection type will appear on the line. Click on this textbox to open a new Connection Settings section in the Settings Panel.



10.3. The first field is the Action field, which indicates the connection type (Contact Changed).

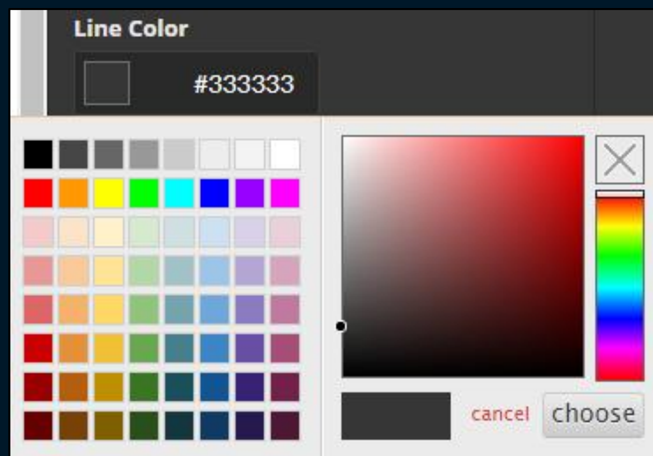
10.4. The second field is the Description field which will display a short description for when the connection will be triggered.



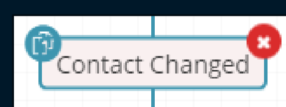
10.5. The third field is the Status field where you can activate or deactivate the connection by clicking the red or blue button respectively. Activating a connection means that the connection will be able to be used as part of the campaign and should perform as expected.

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

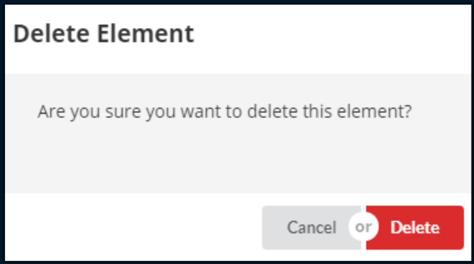
11. The last field is the Line Color field where you can choose the color for that connection's line. **To choose a color:**



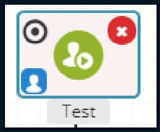
    11.1. Click on the color square in the field and a color selector will appear or enter the hex code of the color in the field next to the square.
    11.2. Choose your desired color from the pre-set swatches on the left side of the selector dropdown or use the right side to manually choose a color.
    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 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.

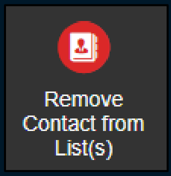


13. To delete a connection, hover over its textbox and click the red "X" button.
    13.1. To delete an element from the campaign, hover your mouse over it and click the red "X" button at the top right corner. A pop-up window will appear asking you to confirm the deletion. Click the red Delete button 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 the campaign has been saved.]

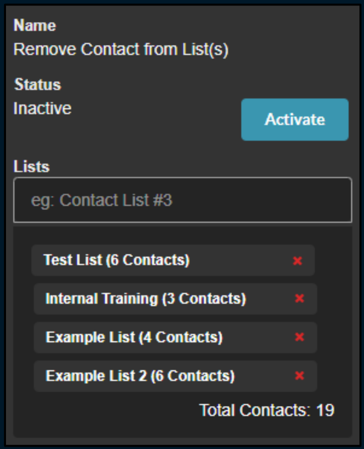
Remove Contact From List(s)



The next drag-and-drop element in the Contact Relationship tab is the Remove Contact From List(s) element. This element allows you to remove contacts from one or more CRM lists based on actions they have performed or input they submitted earlier in the campaign.

To begin setting up this element:

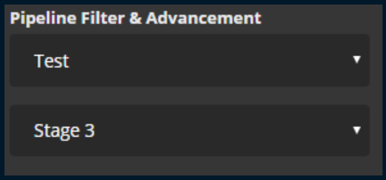
1. Click and drag the Remove Contact From List(s) element or double click it to add it to the canvas.
2. Once you have placed the element onto the canvas and have it selected with your mouse, four additional fields will appear in the Element Settings section on the right-hand side of your screen:
    2.1. **Name:** This field contains the name of the element you added, which cannot be changed.
    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 that the element will be able to be used as part of the campaign and should perform as expected.

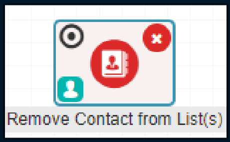


[**Note:** Remember the element will not become active until you save the campaign.]

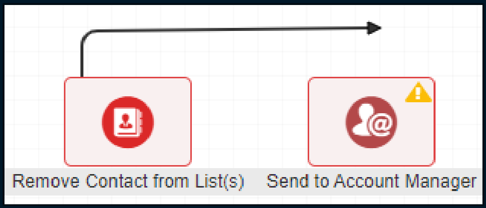
2.3. **Lists:** This field will allow you to select which contact list(s) to remove the contact from once they reach this stage of the workflow. Choose one or more contact lists from this dropdown. The chosen lists will appear below the field. Deselect any lists by clicking the red "X" button next to any of the lists in this section.

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



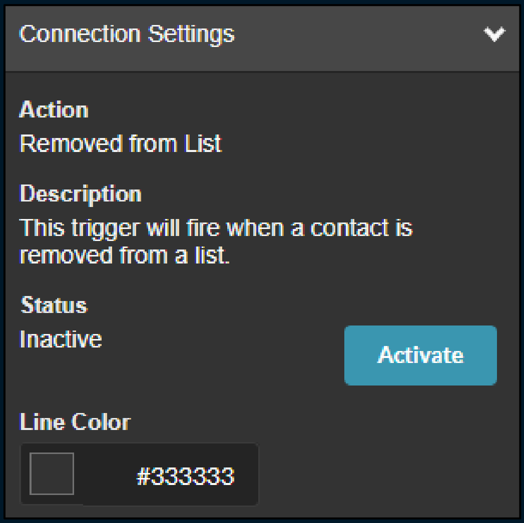


3. To connect your Remove Contact From List(s) element to another element in your campaign, click the black target icon located on the top corner of your element and drag it over to the element you wish to connect it to.



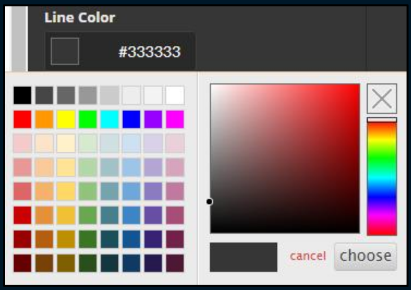
[**Note:** Some elements cannot be connected to each other. For example, you cannot connect two Starting Point elements to each other, and you cannot connect a Starting Point element to the Contact Changed, Start from CRM, or Inbound API elements.]

4. Once a connection has been established between the Contact List 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.

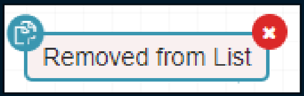


4.1. The first field is the Action field, which indicates the connection type (Removed from List).
4.2. The second field is a Description field, describing when the trigger will be fired.
4.3. The next field is the Status field, where you can activate or deactivate the connection by clicking the blue or red button, respectively. Activating a connection means that it will be able to be used as part of the campaign and should perform as expected.

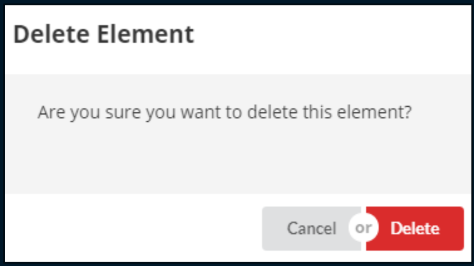
[**Note:** Remember the connection will not become active until you save the campaign.]



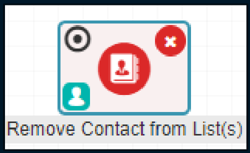
5. The last field is the Line Color field where you can choose the color for that connection's line. **To select a color:**
   5.1. Click on the color square in the field, and a color selector will appear, or enter the hex code of the color in the field next to the square.
   5.2. Choose your desired color from the pre-set swatches on the left side of the selector dropdown or use the right side to choose a color manually.
   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. 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 time by preventing you from reconfiguring the settings for any additional connections requiring the same conditions. Click and drag this button to create a new connection attached to a new element. All connection settings configured in the initial connection will be copied over to the new connection.

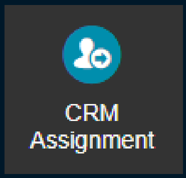


7. Delete a connection by hovering over the connection's textbox and clicking the red "X" button.
    7.1. To delete an element from the campaign, hover your mouse over it and click the red "X" button in the top right corner. A pop-up window will appear asking you to confirm the deletion. Click the red Delete button to complete the deletion or Cancel to close the window without deleting the element.



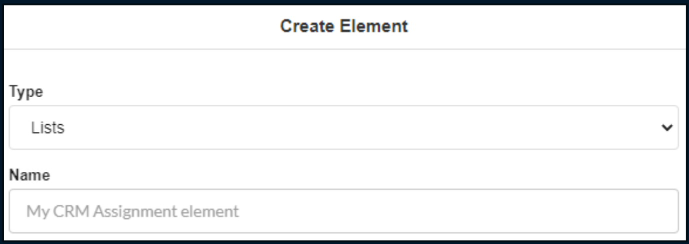
[**Note:** You will only receive the confirmation pop-up if the element has been activated or the campaign has been saved.]

CRM Assignment

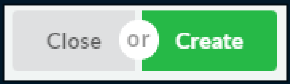


The next drag-and-drop element in the Contact Relationship tab is the CRM Assignment element. This element allows you to assign incoming contacts to a CRM list or account manager according to a configured ruleset.

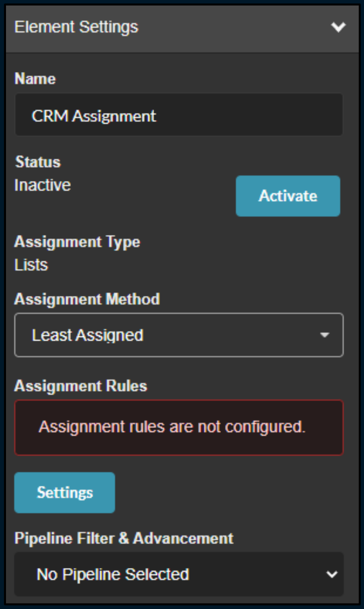
To begin setting up this element:



1. Click and drag the Remove CRM Assignment element or double-click it to add it to the canvas.
2. When you place the element, a sidebar will appear where you will be asked to enter a name for the new element and choose the assignment function of the element. Type the name into the textbox provided and choose whether you are assigning contacts to a list or to an account manager via the Type dropdown in this sidebar.
3. Click the green Create button to create the new element or click the gray Close button to close the sidebar without creating the new element.



4. 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 on the right-hand side of your screen:



4.1. **Name:** This field contains the name of the checkpoint you created, which you can modify if desired by typing a new name into the field.

4.2. **Status:** In this field, 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:** Remember the element will not become active until you save the campaign.]

4.3. **Assignment Type:** This field displays whether you chose to assign contacts to lists or to an account manager when you created the element. This field cannot be changed.

4.4. **Assignment Method:** This field will allow you to select how you wish contacts to be assigned. Choose from one of the three options:

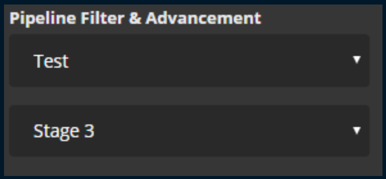
4.4.1. **Round Robin:** This method will assign contacts to the available options one at a time until all options have received a contact, and then will begin going through the options again. Refer to the Assignment Rules section below for more information on creating an assignment rule for this method.

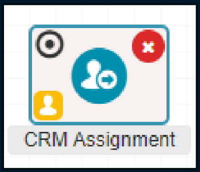
4.4.2. **Priority Order:** This method will assign contacts to the first selected option until the capacity has been reached, and then will continue to assign contacts to the second listed option, third listed option, etc. Refer to the Assignment Rules section below for more information on creating an assignment rule for this method.

4.4.3. **Least Assigned:** This method will assign contacts to the option that has the fewest contacts at the time of assignment. If two or more options have the fewest number of contacts, the one listed first in the ruleset will receive the assignment. Refer to the Assignment Rules section below for more information on creating a ruleset for this method.

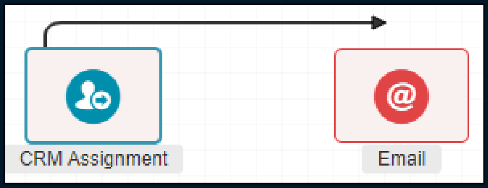
4.5. **Assignment Rules:** This field contains a blue Settings button which, when clicked, will open a sidebar where you can define the ruleset for how contacts are assigned to each option using the chosen assignment method. Refer to the Assignment Rules section below for more information on creating rule sets.

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



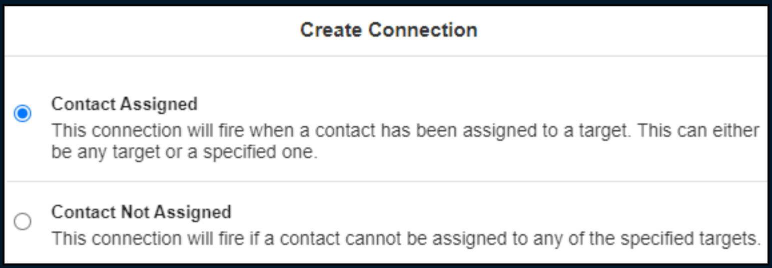


6. To connect your CRM Assignment element to another element in your campaign, click the black target icon in the top corner and drag it over to the element you wish to connect.



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

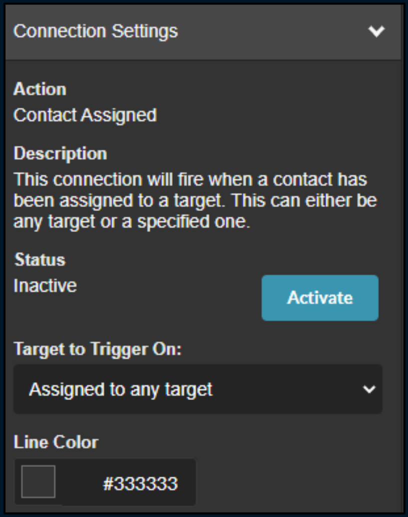
7. A sidebar will appear where you can choose between two connection types:



   7.1. **Contact Assigned:** The campaign will continue through the connection when a contact has been assigned to a list or account manager per the element's configurations.

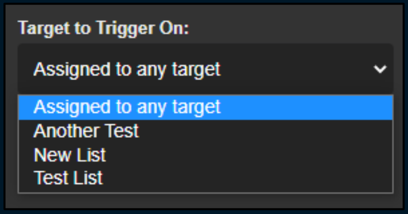
   7.2. **Contact Not Assigned:** If the contact cannot be assigned to a list or account manager per the element's configurations, they will pass through the connection.

8. Once a connection has been established between the Contact List 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.
    8.1. The first field is the Action field, which indicates the connection type: Contact Assigned or Contact Not Assigned.
    8.2. The second field is a Description field, describing when the trigger will be fired.
    8.3. 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 it can be used as part of the campaign and should perform as expected.

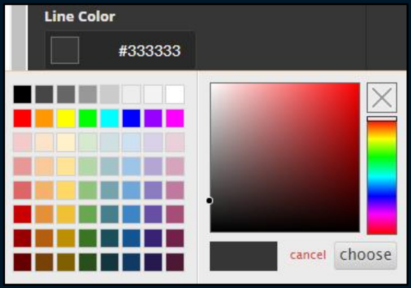


[**Note:** Remember the connection will not become active until you save the campaign.]

9. The following field is the Target to Trigger On field, where you can specify whether the trigger only progresses contacts along a specific branch of the workflow if they have been assigned to a particular list or account manager. By default, this field is set so that any contacts who have been assigned to any targets will be triggered to progress in the workflow, but if you wish only to trigger specific contacts based on the account manager or list they were assigned to, click this field and choose from the options that appear in the dropdown menu.

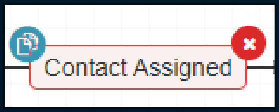


10. The last field is the Line Color field where you can choose the color for that connection's line. **To choose a color:**
    10.1. Click on the color square in the field and a color selector will appear or enter the hex code of the color in the field next to the square.
    10.2. Choose your desired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

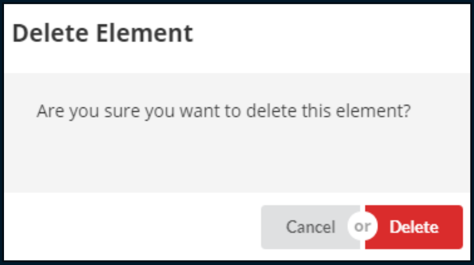


10.3. Click the Choose button at the bottom right side of the color selector to lock in your color or click Cancel to close the selector dropdown without picking a color.

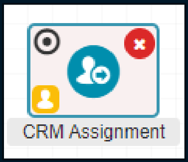
11. To copy a connection, hover your mouse over the textbox appearing on the connection to show a blue button at the top left of the textbox. Copying a connection saves you time by preventing you from having to reconfigure the settings for any additional connections requiring the same conditions. Click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



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



12.1. To delete the element from the campaign, hover your mouse over the element and click the red "X" button in the top right corner. 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 the campaign has been saved.]



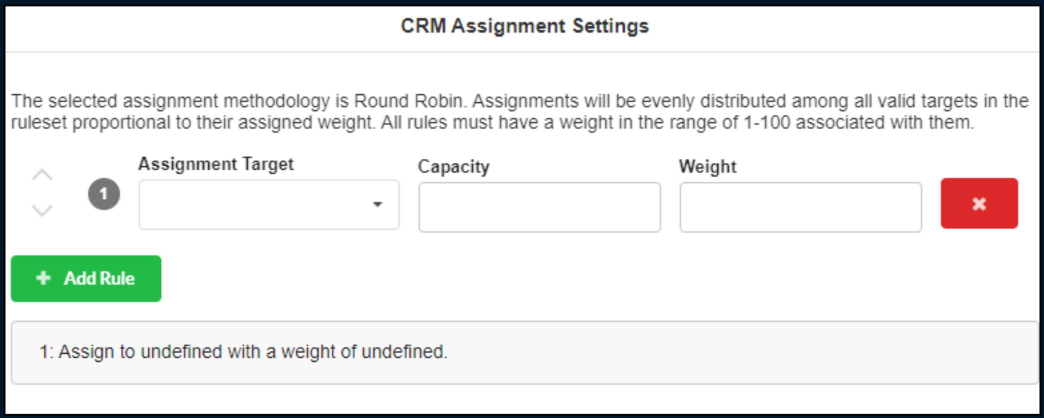
Assignment Rules

The Assignment Rules field in the CRM Assignment element's settings contains a blue Settings button that will produce a sidebar from the right of the screen where you can build the ruleset(s) for how contacts will be assigned to a list or account manager based on the chosen assignment method: Round Robin, Priority Order, and Least Assigned.

1. Click the green Add Rule button in this sidebar to create a ruleset for the chosen method.

Round Robin

2. A field set containing three fields will appear after clicking the green Add Rule button for the Round Robin assignment method. **From here:**



2.1. Choose the assignment target from the first dropdown. The dropdown will contain the available lists or account managers, depending on your chosen assignment type when creating the element.

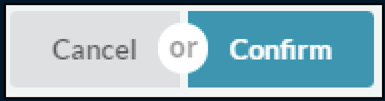
2.2. In the Capacity field, optionally choose the maximum number of contacts that can be assigned to a list/account manager simultaneously.

2.3. The Weight field allows you to assign a weight value to your ruleset. This is a mandatory field as it defines the capability of the assignment target to handle new assignments. The higher the weight, the more capable the list/account manager is of accepting new assignments.

[**Note:** For example, say you assign contacts among three account managers (AM1, AM2, and AM3). This means you need to create a ruleset for each account manager. In these rulesets, AM1 is given a weight of 3, AM2 is given a weight of 2, and AM3 is given a weight of 4. When the element is activated and contacts reach the CRM Assignment element, the system will assign the first three contacts to AM1, the next two contacts to AM2, and the next four contacts will be assigned to AM3. Then the system will return to AM1, assigning the next three contacts to them, and so on.]

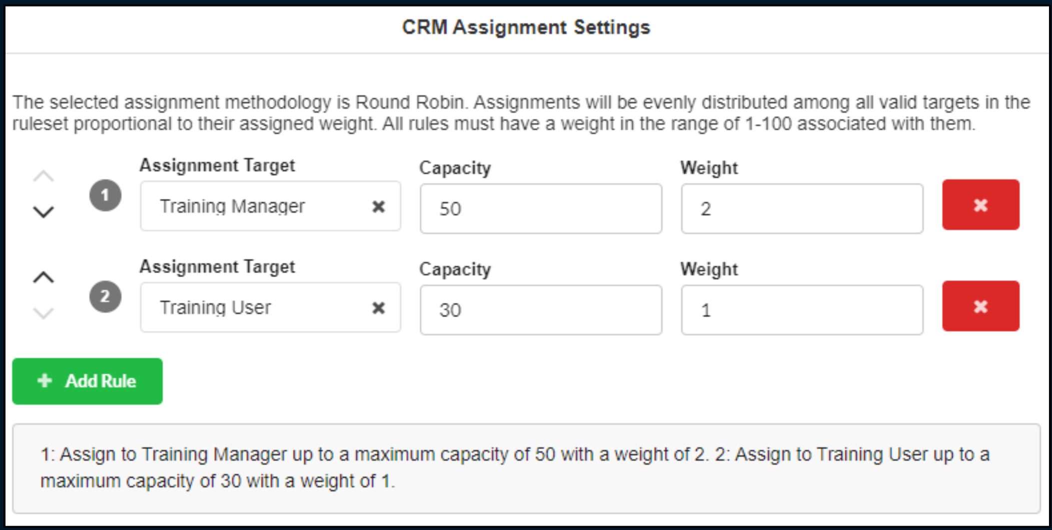
2.4. Create additional rulesets as needed and order them using the arrow buttons located to the left of each ruleset.

2.5. Delete any rulesets by clicking the red “X” button located to the right of the ruleset.



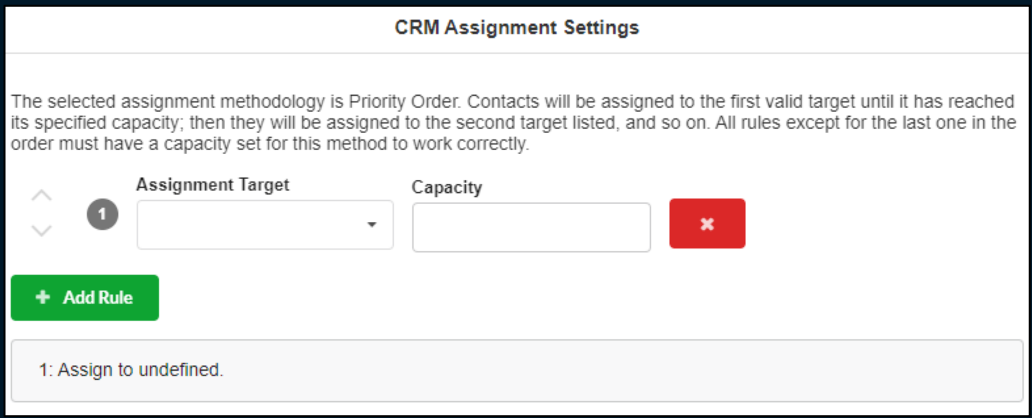
2.6. When you have finished creating and ordering your Round Robin ruleset(s), click the blue Confirm button at the bottom of the sidebar to save the rulesets and close the sidebar. Alternatively, click the gray Cancel button to close the sidebar without creating any rulesets.

2.7. The configured rulesets will now appear in the Assignment Rules field in the CRM Assignment element's settings menu.

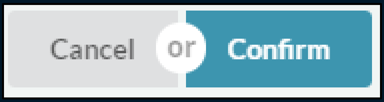


Priority Order

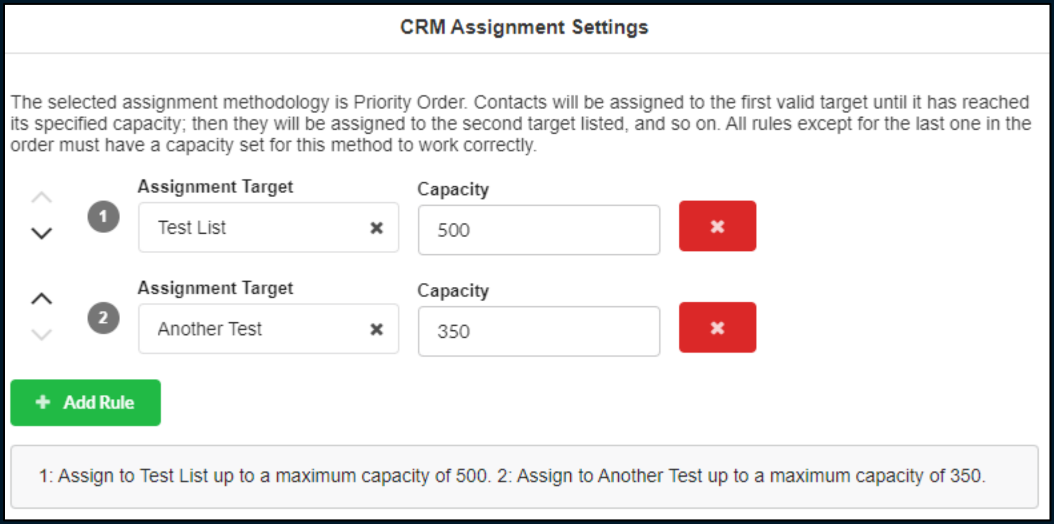
3. After clicking the green Add Rule button for the Priority Order assignment method, a field set containing two fields will appear. **From here:**



4. Choose the assignment target from the first dropdown. The dropdown will contain the available lists or account managers, depending on your chosen assignment type when creating the element.
5. In the Capacity field, optionally choose the maximum number of contacts that can be assigned to a list/account manager simultaneously.
6. Create additional rulesets as needed and order them using the arrow buttons located to the left of each ruleset.
7. Delete any rulesets by clicking the red “X” button located to the right of the ruleset.
8. When you have finished creating and ordering your Priority Order ruleset(s), click the blue Confirm button at the bottom of the sidebar to save the rulesets and close the sidebar. Alternatively, click the gray Cancel button to close the sidebar without creating any rulesets.

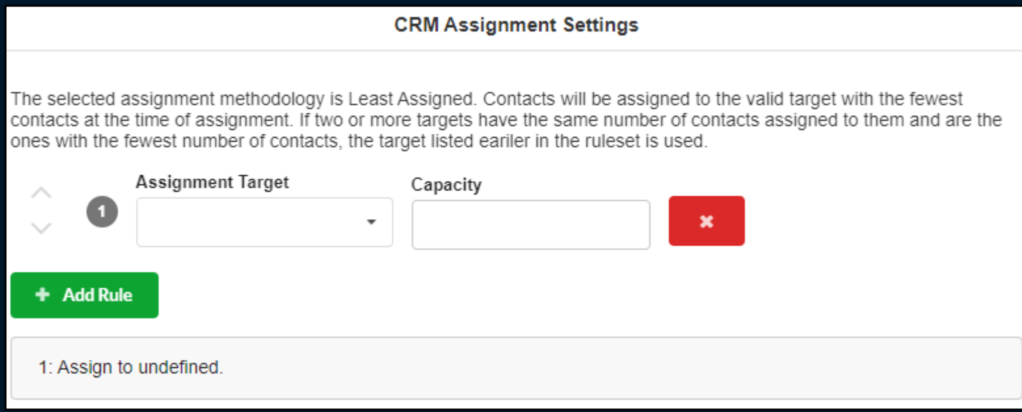


9. The configured rulesets will now appear in the Assignment Rules field in the CRM Assignment element’s settings menu.

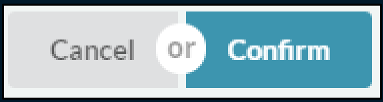


Least Assigned

A field set containing two fields will appear after clicking the green Add Rule button for the Least Assigned assignment method. **From here:**



1. Choose the assignment target from the first dropdown. The dropdown will contain the available lists or account managers, depending on your chosen assignment type when creating the element.
2. In the Capacity field, optionally choose the maximum number of contacts that can be assigned to a list/account manager at one time.
3. Create additional rulesets as needed and order them using the arrow buttons located to the left of each ruleset.
4. Delete any rulesets by clicking the red “X” button located to the right of the ruleset.
5. When you have finished creating and ordering your Least Assigned ruleset(s), click the blue Confirm button at the bottom of the sidebar to save the rulesets and close the sidebar. Alternatively, click the gray Cancel button to close the sidebar without creating any rulesets.



6. The configured rulesets will appear in the Assignment Rules field in the CRM Assignment element's settings menu.