SimplyCast

Powering Automation, Igniting Growth for Smarter Connections

SimplyCast 360

Automation Flow Editor Creation Developers 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:

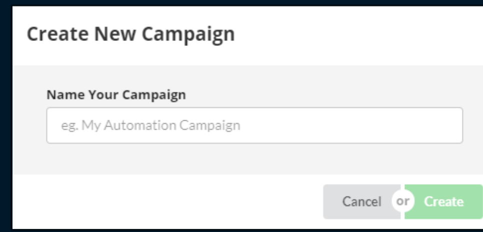
- **Element:** An element is one of the various tools or communication channels that users can drag and drop onto the canvas and configure as part of a SimplyCast 360 campaign.
- **Connection:** A connection is a rule or condition that tells an element how a contact should interact with it when they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

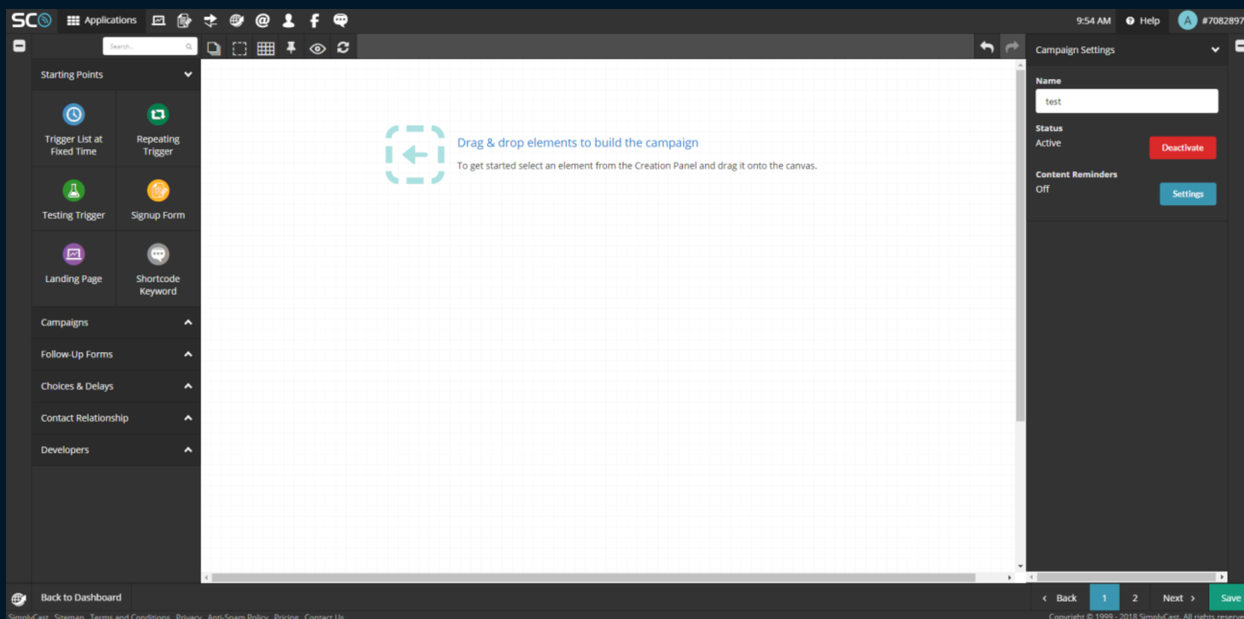
To access the SimplyCast Automation Flow Editor:

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.



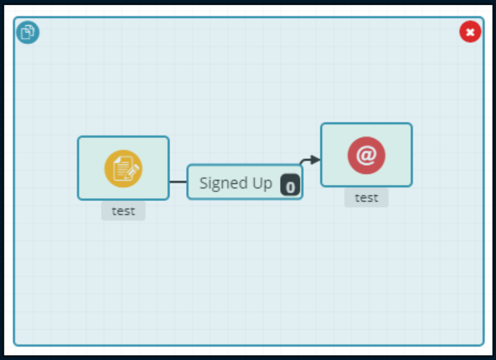
3. Click the green Create button to create the campaign, close the sidebar, and be redirected to the Automation Flow Editor.
    3.1. Or click Cancel to close the pop-up without creating a campaign.



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.

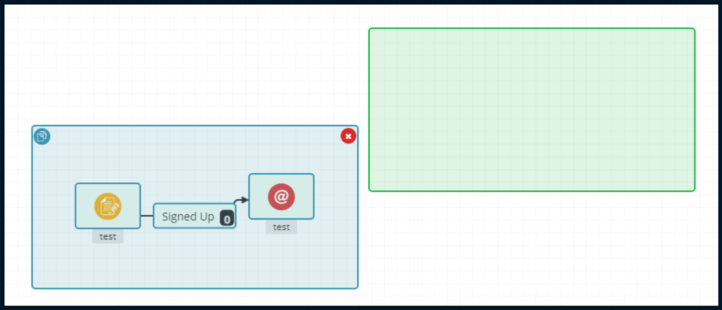
You are also able to highlight a section on the canvas containing multiple elements.



To do this:

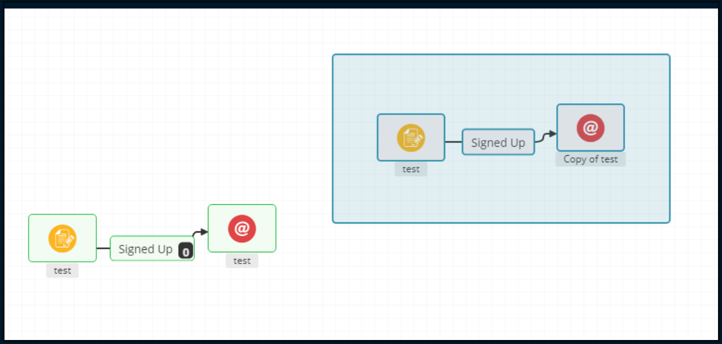
1. Click and hold the mouse down on a blank section of the canvas and drag the mouse to create a blue box.
2. Drag the mouse until the blue box covers all the elements you want highlighted, then release the mouse.

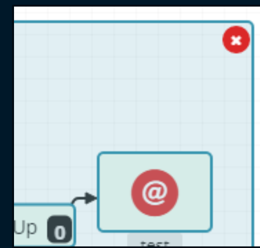
When you hover your mouse over a highlighted section of the canvas, you will see two new icons appear in the top corners of the blue box. On the left is a Copy All Selected icon, which allows you to create a second copy of the highlighted section in the canvas.



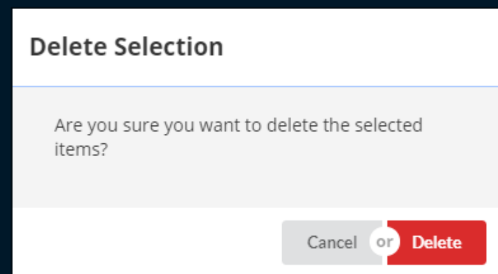
To do this:

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.



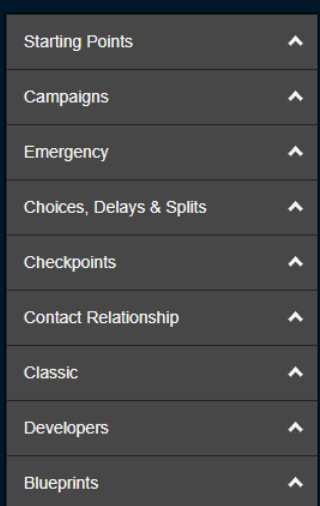


4. The red “X” icon on the top right corner is used to delete the highlighted section of your campaign. When you hover your mouse over the highlighted section, this red “x” icon will appear. Click the icon, and a pop-up will appear asking you to confirm your deletion. Click the red Delete button to confirm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

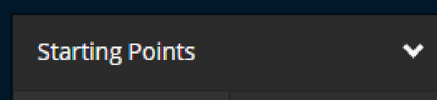
To add a SimplyCast 360 element to your campaign, either drag and drop the icon into the canvas or double-click the icon. There are nine different tabs of elements you can choose from.

These are:

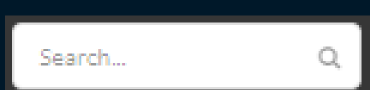
1. **Starting Points:** These elements can be used as a jumping-off point in creating the SimplyCast 360 campaign.
2. **Campaigns:** These elements are the different types of messages that can be sent to project contacts and can be set up and customized in their respective editors.

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.]



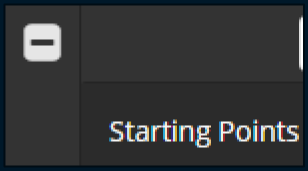
To open a tab in the Creation Panel, click on the tab name you want to open. The tab will expand to display the elements within that tab. To close the tab, click the tab name again.



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.

Developers

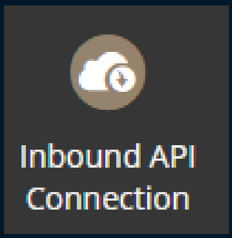
The last tab in the Creation Panel on the left side of the screen is the Developers tab. The elements in this tab allow you to push, pull, and transfer data to and from the SimplyCast system and external sources. Connections enabling information to be received and sent through external parties must be configured through the Integration Marketplace. Refer to the *SimplyCast Integrations Marketplace User Guide* for more information.

The elements in this tab are:

- **Inbound API Connection:** This element acts like a starting point for a SimplyCast 360 campaign which allows for the addition of inbound data to your campaign from another system that you would like to access in this campaign.
- **Outbound API Connection:** This element allows you to enable the SimplyCast platform to send outbound data to an outside platform, such as contact information to a CRM external to SimplyCast.

[**Note:** The elements in the Developers tab should only be used by advanced users with development experience. Refer to SimplyCast's API documentation for more information about setting up an API connection: https://app.simplycast.com/?q=api/index]

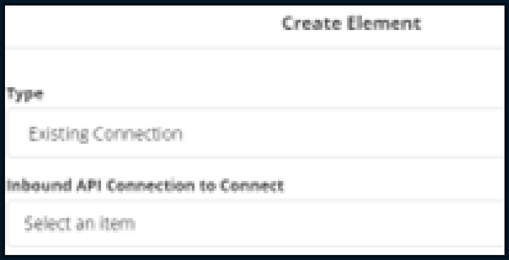
Inbound API Connection



The first drag-and-drop element in the Developers tab is the Inbound API Connection element. This element acts like a starting point for a SimplyCast 360 campaign which allows for the addition of inbound data to your campaign from another system that you would like to access in this campaign.

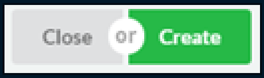
To begin setting up this element:

1. Click and drag the Inbound API Connection element or double click to add it to the canvas.
2. When you place the element, a pop-up window will appear with two fields. The first field will ask you to choose the API type you wish to create from the dropdown menu, either a new API connection or an existing connection. If you choose to use an existing inbound API connection, a new field will appear in the pop-up where you can choose one of your existing inbound API connections from the dropdown list available.

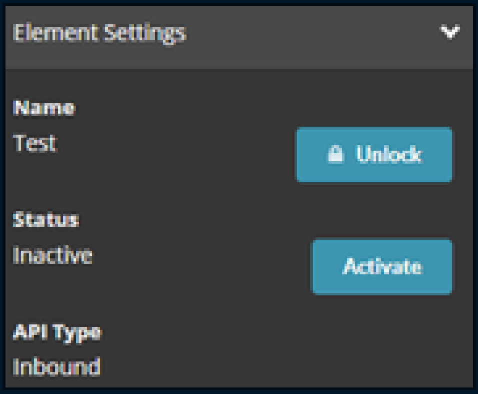


3. If you choose to create a new API connection, the second field will ask you to enter a name for the new connection. Type the name into the textbox provided.

4. Click the green Create button to create the new element or click the gray Close button to close the sidebar without adding the new element.



5. 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:
   5.1. **Name:** This field contains the name you selected when you added the element to the canvas. By default, the name of the API connection will be locked. To unlock and change the name of the connection, click the blue Unlock button, then edit the name of the element in the textbox provided.



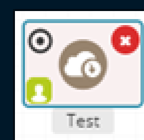
[**Note:** Keep in mind that changing the name of an API connection changes its name across the entire SimplyCast application, not just this campaign. For example, the same API connection can be used on multiple SimplyCast 360 canvases, therefore if it is renamed in one campaign, the new name will also appear in every other campaign it is found in.]

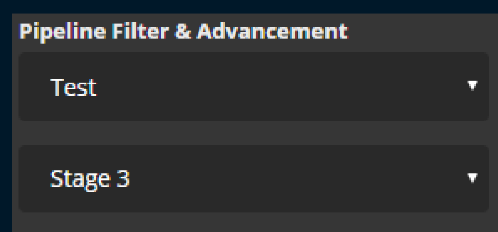
5.2. **Status:** This field is where you can activate or deactivate the element by clicking the blue or red button respectively. Activating an element means that the element will be able to be used as part of the campaign and should perform as expected.

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

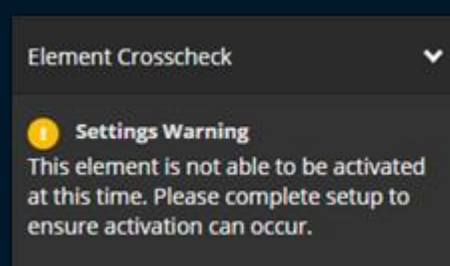
5.3. **API Type:** This field states that the API connection is inbound.

5.4. **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.

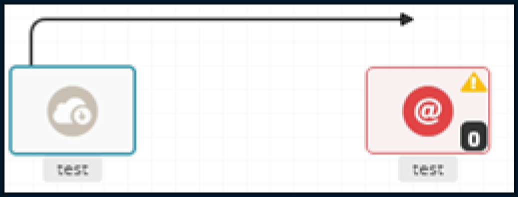




6. If there is an issue with the element that needs to be resolved before the element can be activated, there will be a yellow or red exclamation point symbol in the top right corner of the element to signify this. If this is the case, when you select the element with your mouse, an additional section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

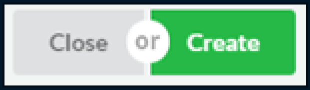


7. To connect your Inbound API Connection element to another element in your campaign, click the black target icon located on the top corner of your element and drag it over to the element you wish to connect it to.

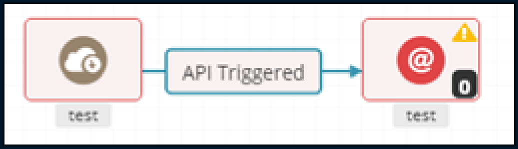


[**Note:** Some elements are not able to be connected to each other. For example, you cannot connect two Starting Point elements to each other, and you cannot connect a Starting Point element to the Contact Changed, Start from CRM, or Inbound API elements.]

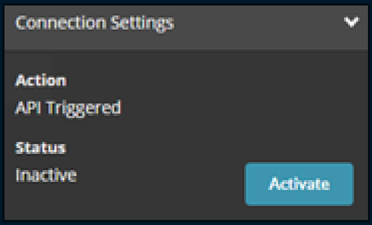
8. Click the green Create button to connect the two elements or the gray Close button to close the sidebar without connecting the two elements.



9. Once a connection has been established between the Inbound API Connection 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.



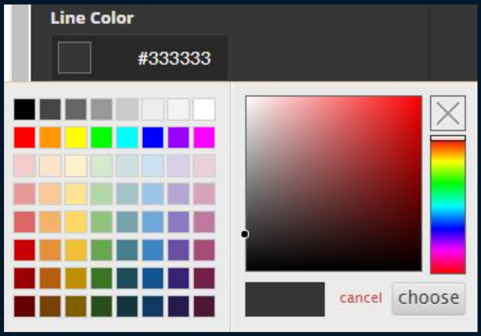
10. The first field is the Action field, which indicates the connection type (API Triggered).



11. The second field is the Description field which will display a short description for when the connection will be triggered.
12. 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.]

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



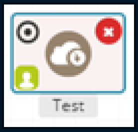
14. **To choose a color:**

    14.1. 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.

    14.2. 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.

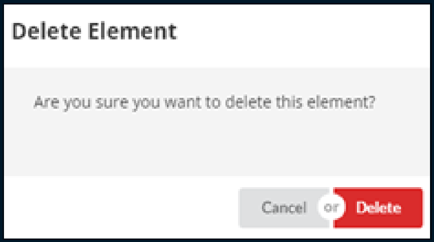
    14.3. Click the Choose button at the bottom right side of the color selector to lock in your color or click Cancel to close the selector dropdown without picking a color.

15. 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.



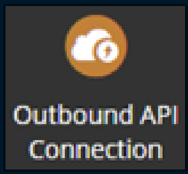
16. Delete a connection by hovering over the connection's textbox and clicking the red "X" button.

17. 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.]

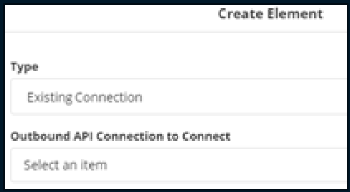
Outbound API Connection



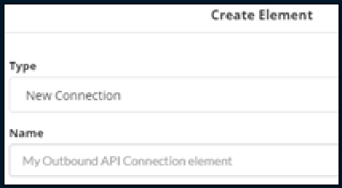
The second drag-and-drop element in the Developers tab is the Outbound API Connection element. This element allows you to enable the SimplyCast system to send outbound data to an outside platform, such as contact information to a CRM external to SimplyCast.

To begin setting up this element:

1. Click and drag the Outbound API Connection element or double click to add it to the canvas.
2. When you place the element, a pop-up window will appear with two fields. The first field will ask you to choose the API type you wish to create from the dropdown menu, either a new API connection or an existing connection. If you choose to use an existing outbound API connection, a new field will appear in the pop-up where you can choose one of your existing outbound API connections from the dropdown list available.



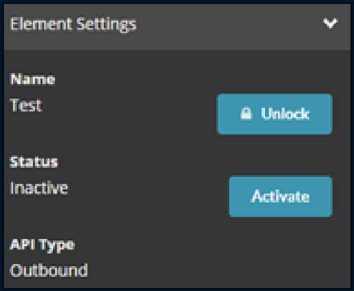
3. If you choose to create a new API connection, the second field will ask you to enter a name for the new element. Type the name into the textbox provided.



4. 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.

5. 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:

    5.1. **Name:** This field contains the name you selected when you added the element to the canvas. By default, the name of the API connection will be locked. To unlock and change the name of the connection, click the blue Unlock button, then edit the name of the element in the textbox provided.



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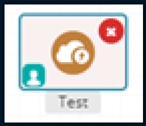
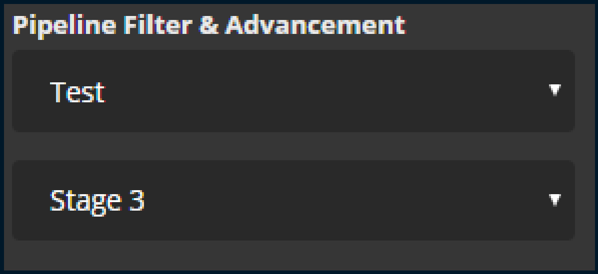
5.2. **Status:** This field is where you can activate or deactivate the element by clicking the blue or red button respectively. Activating an element means that the element will be able to be used as part of the campaign and should perform as expected.

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

5.3. **API Type:** This field states that the API connection is outbound.

5.4. **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.





[**Note**: The Outbound API element cannot connect to other elements. It must always be the element that is connected with as it is meant to be an ending point of a campaign.]

6. 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.