Powering Automation, Igniting Growth for Smarter Connections

SimplyCast 360

Automation Flow Editor Creation Emergency 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.

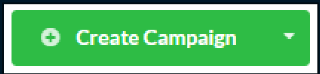
Automation Flow Editor Overview

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.

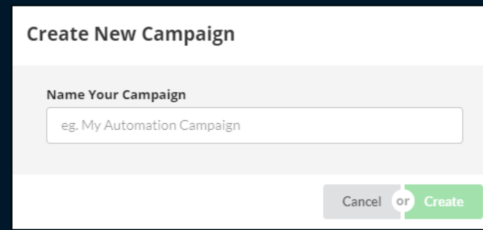
[**Note:** Refer to the *SimplyCast 360 Glossary Guide* for more key terms and definitions.]

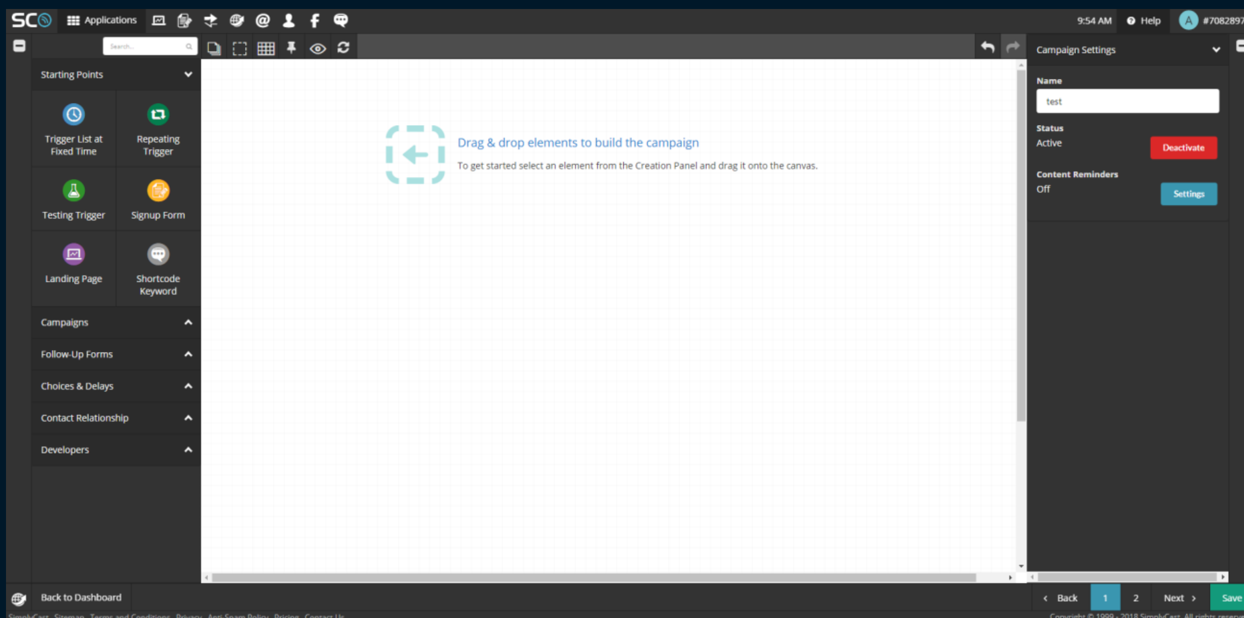
To access the SimplyCast Automation Flow Editor:



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

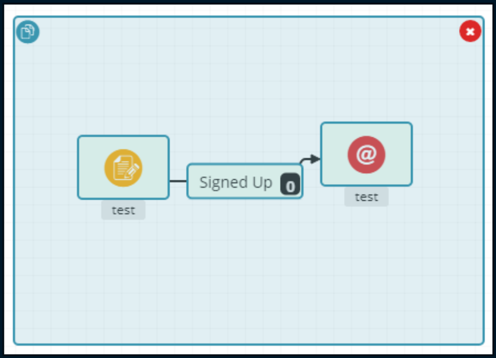
2. A pop-up will appear where you will be asked to name the campaign. Type the name into the textbox provided.
3. Click the green Create button to create the campaign, close the sidebar, and be redirected to the Automation Flow Editor.
    a. Or click Cancel to close the pop-up without creating a campaign.





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

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

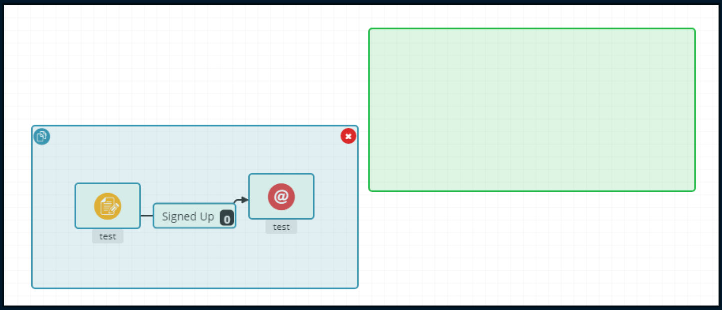


You are also able to highlight a section on the canvas containing multiple elements.

To do this:

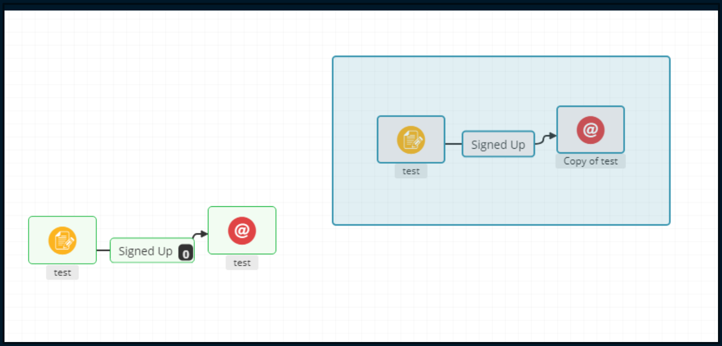
1. Click and hold the mouse down on a blank section of the canvas and drag the mouse to create a blue box.
2. Drag the mouse until the blue box covers all the elements you want highlighted, then release the mouse.

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

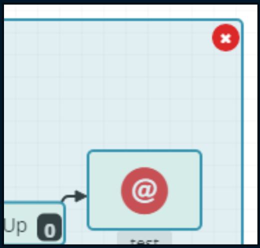


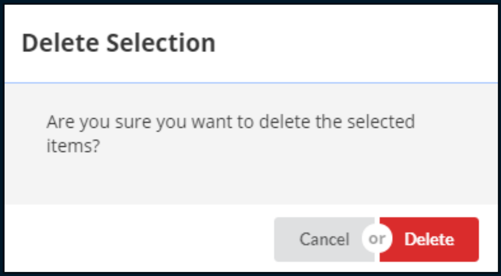
To do this:

1. Press the mouse down on the Copy All Selected icon and drag it to another spot on the canvas. An empty green box will appear when you drag the mouse.
2. Drop the green box anywhere on the canvas, and it will turn blue and become populated with the elements and connections you copied.
3. Upon doing this, the section you initially highlighted will be deselected, and the copied version will be selected instead. The element names in the copied section will be a “Copy of” whatever you named the original element.



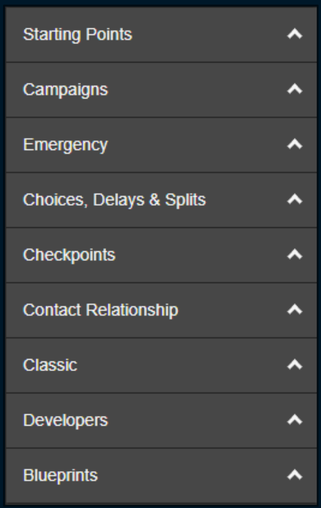
4. The red “X” icon on the top right corner is used to delete the highlighted section of your campaign. When you hover your mouse over the highlighted section, this red “x” icon will appear. Click the icon, and a pop-up will appear asking you to confirm your deletion. Click the red Delete button to confirm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





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

Creation Panel



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

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

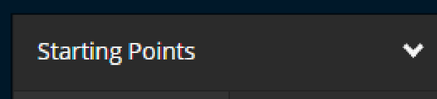
These are:

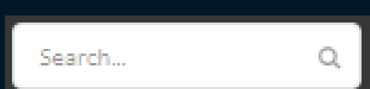
1. **Starting Points:** These elements can be used as a jumping-off point in creating the SimplyCast 360 campaign.
2. **Campaigns:** These elements are the different types of messages that can be sent to project contacts and can be set up and customized in their respective editors.

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

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

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

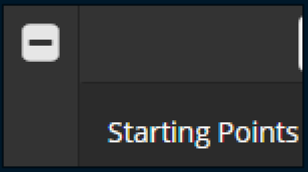




Search for a specific element using the search bar above the Creation Panel. This saves you from opening multiple tabs until you find the element needed. Enter your search query into the search bar and the elements displayed will begin to filter.

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

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

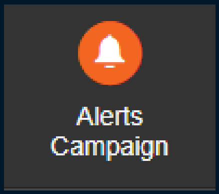


In the top left corner of the Creation Panel, there is a gray "-" button. To hide the Creation Panel and expand the Canvas, click this "-" button. Once the Creation Panel is hidden, the "-" button will turn into a "+" sign. When the Creation Panel is hidden, click the "+" sign to re-expand it.

Emergency

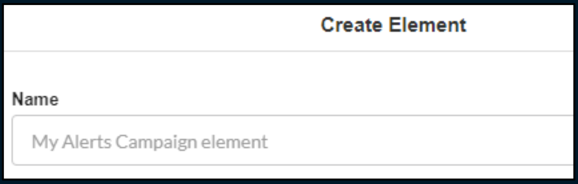
The next tab in the Creation Panel on the left side of the screen is the Emergency tab. This tab contains the emergency communication elements, which are part of SimplyCast's emergency suite of tools. These tools can be used to send out notifications quickly and efficiently in an emergency.

Alerts Campaign



The only drag-and-drop element in the Emergency tab is the Alerts Campaign element. This element allows you to create and send an alert to your contacts via multiple communication channels when they reach a particular point in the campaign.

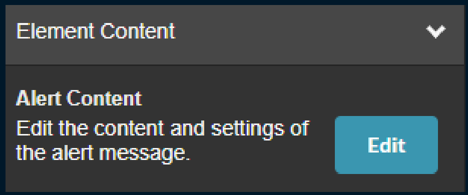
To begin setting up this element:



1. Click and drag the Alerts element or double click to add it to your canvas.
2. When you place the element, a sidebar will appear. The field in this sidebar will ask you to enter a name for the new Alerts element. Enter a name into the field provided.
3. Click the green Create button to create the element and close the sidebar. Or, click the gray Cancel button to close the sidebar without adding an Alerts Campaign element.

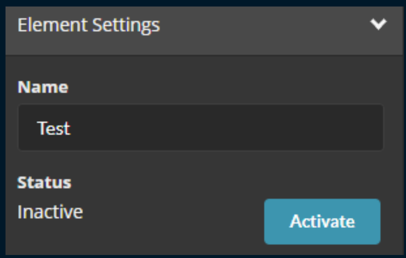
4. Once you have placed the element onto your canvas and have it selected with your mouse, six additional fields will appear in the Settings Panel on the right-hand side of the screen:

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



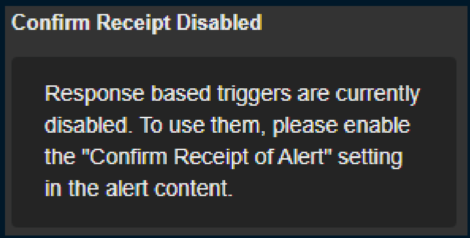
4.2. **Name:** This field contains the name you selected when you added the element to your canvas. To change the name of your element, edit the name in the textbox provided.

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

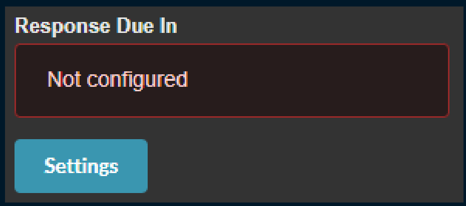


[**Note:** Remember the element will not become active until you save the campaign.]

4.4. **Confirm Receipt Disabled:** Before saving the SimplyCast 360 campaign after adding the Alerts element, you will see the Confirm Receipt Disabled field in the Settings Panel below the Status field. This field will provide you with a message warning you that the response-based triggers are disabled, and to ensure that you have the Confirmation of Receipt section enabled in the Alerts setup.



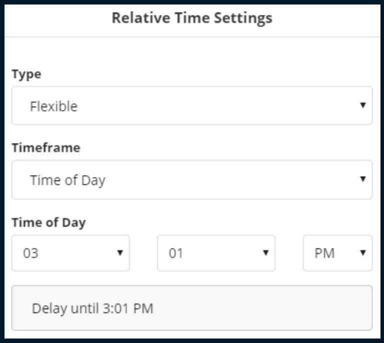
4.5. **Response Due In:** Once you have saved the SimplyCast 360 campaign after adding the Alerts element, you can set up the response-based triggers. This field contains two sections. The first section is a textbox describing the time the system will wait for a response to the alert. By default, this textbox will say "Not Configured."



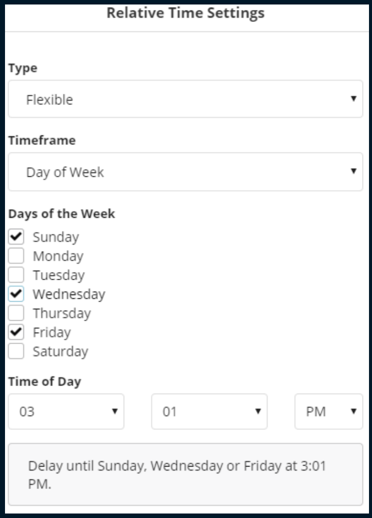
Time Settings

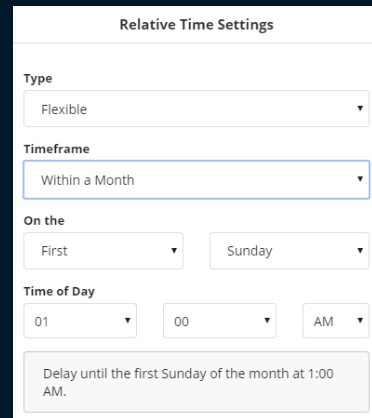
The second section is a blue Settings button where you can configure how long the system will pause the campaign and wait for a response before progressing to the next element. Clicking this button will open the Relative Time Settings sidebar, where you can choose the type of response delay from the Type dropdown: Fixed Offset or Flexible.

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



2. A flexible delay means the response delay can be set to customized lengths, rather than a specific, fixed time. Choosing Flexible as your type causes a Timeframe dropdown field to appear in the sidebar. From this dropdown, choose whether you want the system to wait until a specific time of day, on a day of the week, or sometime within a month. Selecting the Time of Day option means the system will wait until a selected time within the next 24 hours.





2.1. Choose when the system will stay from the dropdown menu options in the Time of Day field set. Selecting the Day of Week option will cause a Days of the Week field to appear where you must select the day(s) of the week option(s) you wish the system to wait until.

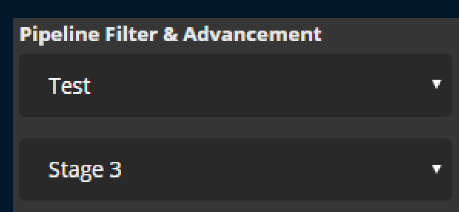
2.2. Choose the day(s) when the response delay can end by checking them off. Then select the time of day the response delay will end by selecting the time from the dropdown menus available in the Time of Day field set.

2.3. Selecting the Within a Month option will cause an “On the” field set to appear. Here, choose the week of the month you wish the system to wait for a response until in the first field, and the second field, select the day of the week.

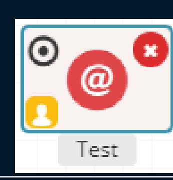
2.4. Choose the time of day the response delay will end from the dropdown menus available. The textbox below will describe the response delay interval configured for all flexible delay type options.

[**Note:** For example, say you selected the Day of Week option in the Timeframe dropdown Menu and chose Sunday, Wednesday, and Friday at 3:01 PM in their respective fields. The textbox below the fields will indicate the system will wait for a response to the alert until the following Sunday, Wednesday, or Friday at 3:01 PM.]

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

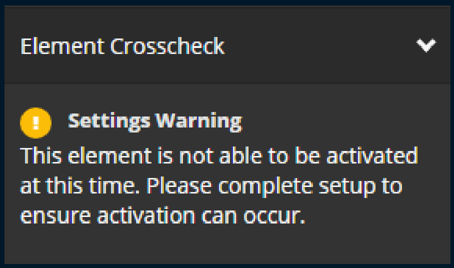


4. **Pipeline Filter & Advancement:** Choose whether you would like contacts to progress through any pipelines you may have associated with the campaign. In the dropdown menu in this field, choose the pipeline you would like contacts to be added to. A second dropdown will appear to choose the stage of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

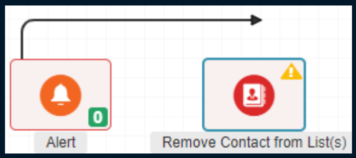


choose to set a pipeline stage to this element, an icon will appear on the bottom left corner of the element in your campaign to indicate that contacts will move through a pipeline stage at this point in your campaign.

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



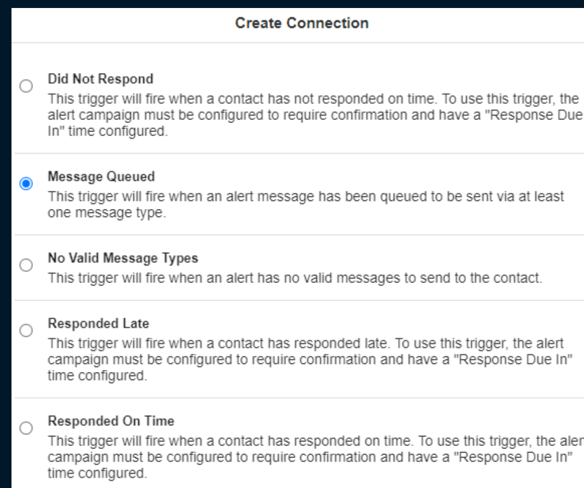
6. To connect your Alerts element to another element in your campaign, click the black target icon on the top corner of the element and drag it over to the element you wish to connect it to.



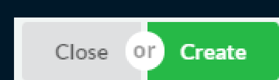
[**Note:** Some elements cannot be connected. For example, you cannot connect two Starting Point elements, and you cannot connect a Starting Point element to the Contact Changed, Start from CRM, or Inbound API elements.]

Connection Types

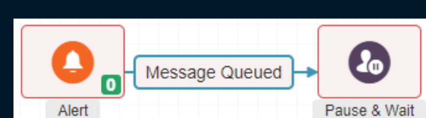
A sidebar will appear where you can choose between five connection types:

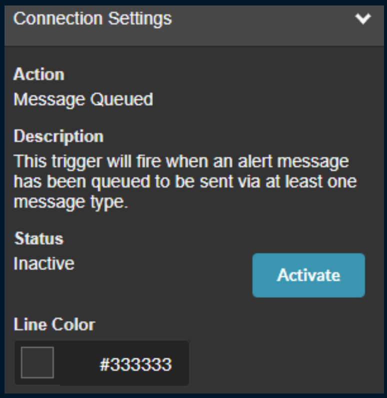


1. **Did Not Respond:** The campaign will continue through the connection when a recipient does not respond to the alert within the configured time. The alert campaign must be configured with “Confirmation of Receipt” enabled and a “Response Due In” time configured to use this connection type.
2. **Message Queued:** This means the campaign will continue through the connection if the alert has been queued to send to a contact via at least one communication channel.
3. **No Valid Message Types:** The campaign will continue through the connection when a contact does not have contact information for any configured alert communication channels.
4. **Responded Late:** The campaign will continue through the connection when the contact responds to the alert after the configured “Response Due In” time. The alert campaign must be configured with “Confirmation of Receipt” enabled and a “Response Due In” time configured to use this connection type.
5. **Responded On Time:** The campaign will continue through the connection if the contact responds to the alert within the configured “Response Due In” time. The alert campaign must be configured with “Confirmation of Receipt” enabled and a “Response Due In” time configured to use this connection type.
6. Click the green Create button to connect the two elements or the gray Close button to close the sidebar without connecting the two elements.



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

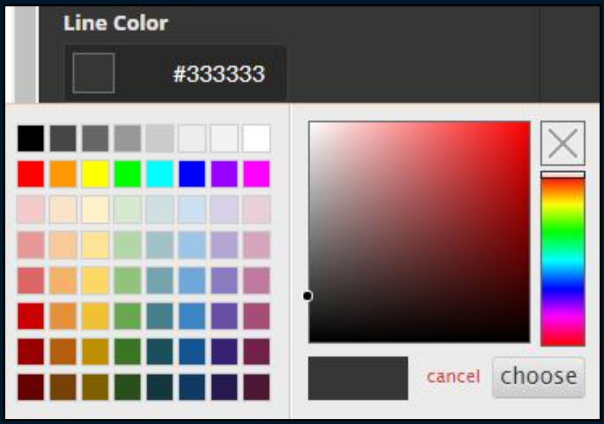




8. Click on this textbox to open a new Connection Settings section in the Settings Panel.
    8.1. The Connection Settings section has four fields. The first is the Action field, which indicates the connection type selected (Did Not Respond, Message Queued, No Valid Message Types, Responded Late, or Responded On Time).
    8.2. The second field is the Description field, which briefly describes when the connection will be triggered.
    8.3. 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 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.]

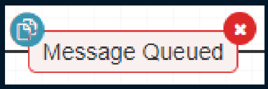
9. The final field is the Line Color field where you can choose the color for that connection's line. **To choose a color:**



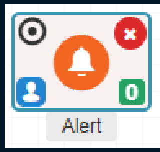
    9.1. Click on the color square in the field, and a color selector will appear, or enter the hex code of the color in the field next to the square.
    9.2. Choose your desired color from the pre-set swatches on the left side of the selector dropdown or use the right side to choose a color manually.
    9.3. 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.

Copying and Deleting Connections

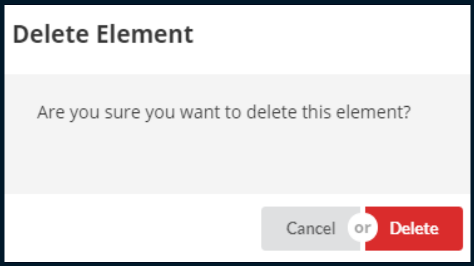
1. To copy a connection, hover your mouse over the textbox appearing on the connection to show a blue button at the top left of the textbox. Copying a connection saves you time by preventing you from reconfiguring the settings for any additional connections requiring the same conditions. Click and drag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



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



3. 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 if the campaign has been saved.]