SimplyCast

Powering Automation, Igniting Growth for Smarter Connections

# SimplyCast 360

## Automation Flow Editor Creation Starting Points 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:

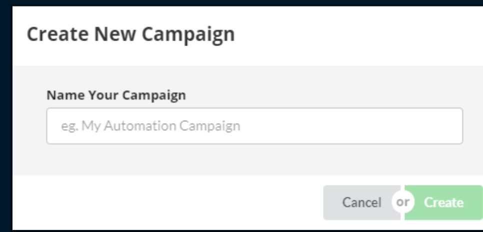
- **Element:** An element is one of the various tools or communication channels that users can drag and drop onto the canvas and configure as part of a SimplyCast 360 campaign.
- **Connection:** A connection is a rule or condition that tells an element how a contact should interact with it when they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

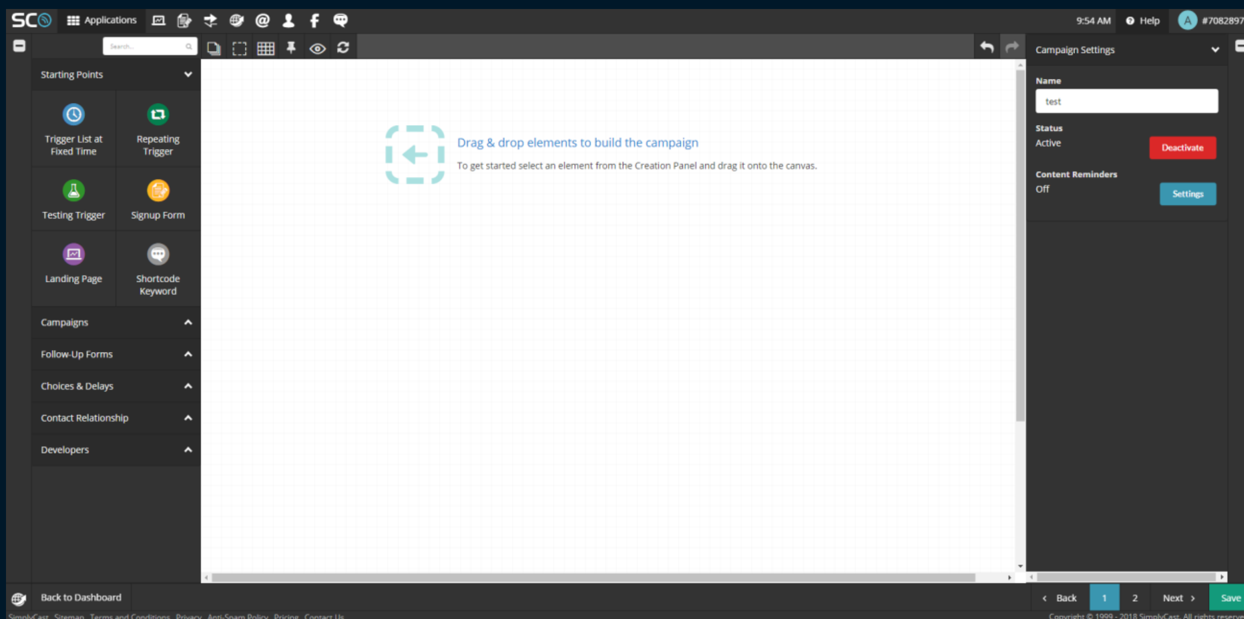
**To access the SimplyCast Automation Flow Editor:**


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.

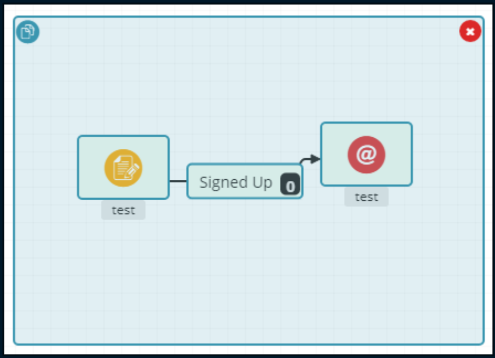



3. Click the green Create button to create the campaign, close the sidebar, and be redirected to the Automation Flow Editor.
    a. Or click Cancel to close the pop-up without creating a campaign.




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.

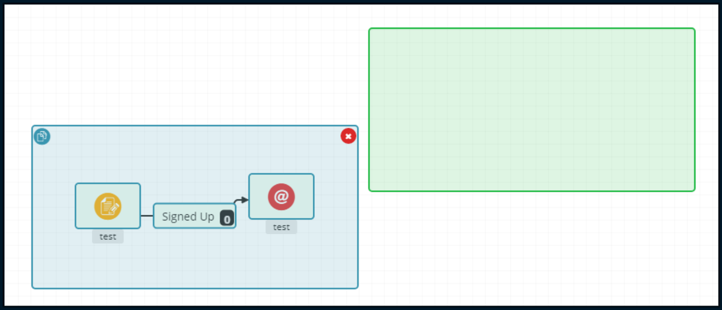



You are also able to highlight a section on the canvas containing multiple elements.

**To do this:**

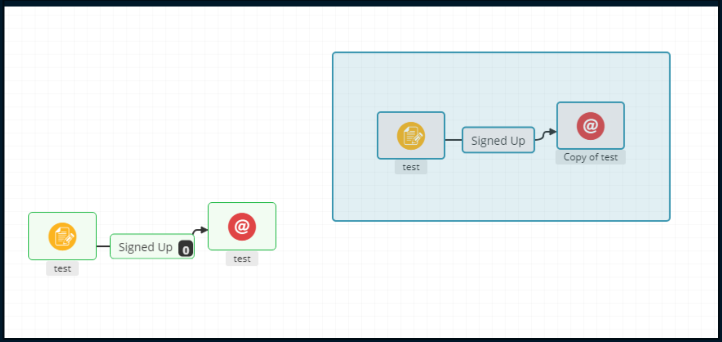
1. Click and hold the mouse down on a blank section of the canvas and drag the mouse to create a blue box.
2. Drag the mouse until the blue box covers all the elements you want highlighted, then release the mouse.

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.

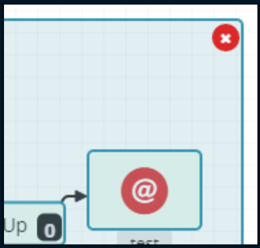


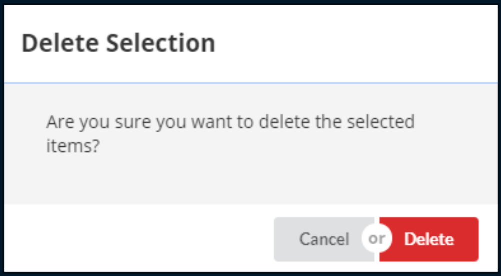
**To do this:**

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.



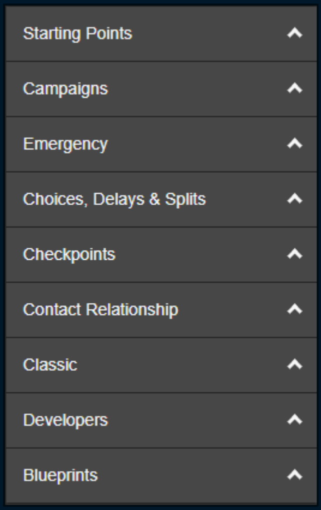
4. The red “X” icon on the top right corner is used to delete the highlighted section of your campaign. When you hover your mouse over the highlighted section, this red “x” icon will appear. Click the icon, and a pop-up will appear asking you to confirm your deletion. Click the red Delete button to confirm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

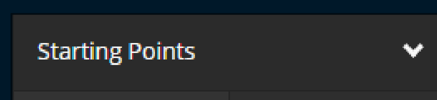
**These are:**

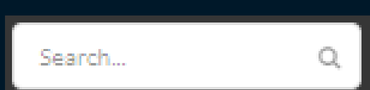
1. **Starting Points:** These elements can be used as a jumping-off point in creating the SimplyCast 360 campaign.
2. **Campaigns:** These elements are the different types of messages that can be sent to project contacts and can be set up and customized in their respective editors.

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.

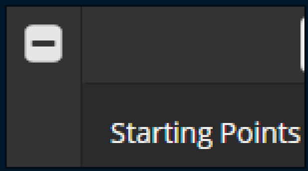



Search for a specific element using the search bar above the Creation Panel. This saves you from opening multiple tabs until you find the element needed. Enter your search query into the search bar and the elements displayed will begin to filter.

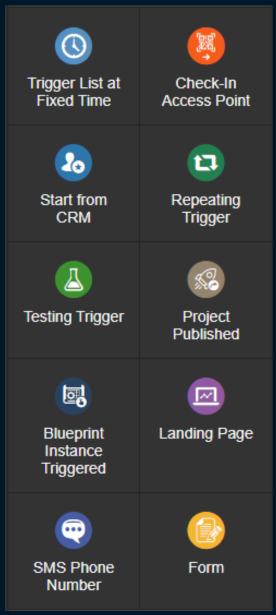
Once you find the element you're looking for, either double-click or drag-and-drop it into the canvas to add it to your campaign or double-click to add it to the canvas.

[**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.

## Starting Points




The Starting Points tab is the first tab in the Creation Panel on the left side of the screen. The elements appearing in this tab are typically used to start the SimplyCast 360 Campaign.

**There are ten elements in this tab:**

1. **Trigger List at Fixed Time:** This element allows you to choose when to begin sending contacts from a contact list through the flow.
2. **Check-In Access Point:** This element triggers when
3. **Start From CRM:** This element allows you to start a SimplyCast 360 campaign from a contact’s profile within the CRM.
4. **Repeating Trigger:** A repeating trigger starts a campaign repeatedly at an interval you set. This element allows you to trigger parts of your campaign at regular intervals automatically. This could be useful for regularly checking scores and tags, for example.
5. **Testing Trigger:** This element allows you to send a selection of contacts through the SimplyCast 360 campaign to test the campaign before sending your entire list(s) of contacts through it to ensure all elements behave as expected.
6. **Project Published:** This element begins the workflow once a campaign has been published. Currently, it is restricted to Form projects.
7. **Blueprint Instance Triggered:** This starting element will cause the flow to start based on an existing Blueprint trigger. When the trigger conditions are met, the flow will start.
8. **Landing Page:** A landing page is a one-off webpage, not found on your company’s website, to provide readers with information on a specific topic, such as information about a company event. This element allows you to create a webpage accessible by

clicking on a link on a website or in an email and contains a form these visitors can use to sign up for communications or to receive further information.

9. **SMS Phone Number:** This element allows you to use a shortcode keyword to trigger the SimplyCast 360 campaign. A shortcode is a five- or six-digit number you can text using a mobile phone. A keyword can be registered to the shortcode and will trigger a set of messages when texted to the shortcode.
10. **Form:** This element allows you to create a form that can be hosted on a website, landing page, or stand alone as a shareable URL. This is a good option to choose if you are collecting contact information.

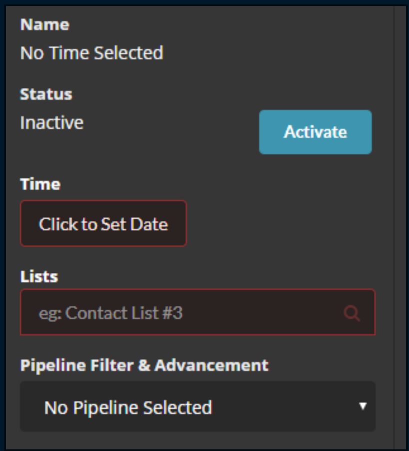
## Trigger List at a Fixed Time


The first drag-and-drop element in the Starting Points tab is the Trigger List at Fixed Time element. This element allows you to choose when to begin sending contacts from a contact list through the flow.

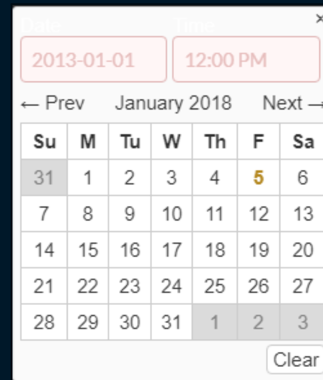
[**Note:** Once a Trigger List at Fixed Time element has been used in a campaign, it cannot be reused (e.g., when copying a campaign).]

**To begin setting up this element:**

1. Click and drag or double-click the Trigger List at Fixed Time element to add it to your canvas.
2. Once the Trigger List at Fixed Time element is on your canvas and is selected with your mouse, five fields will appear in the Settings Panel to the right of the canvas. **These are:**
   - 2.1. **Name:** This field will automatically update to match the time selected in the Time field.
   - 2.2. **Status:** Activate or deactivate the element. To activate the element, click the blue Activate button. Activating an element means that the element will be able to be used as part of the campaign and should perform as expected. Activating the element will turn this button into a red Deactivate button. Click this red button to deactivate the activated element.

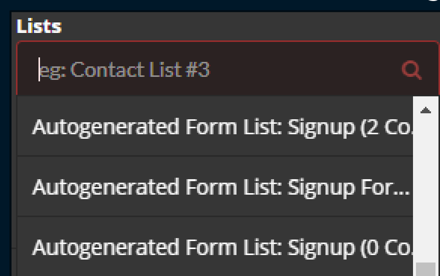


[**Note:** Remember that the element's status will not change until you save the campaign, unless all the element's settings are configured correctly.]

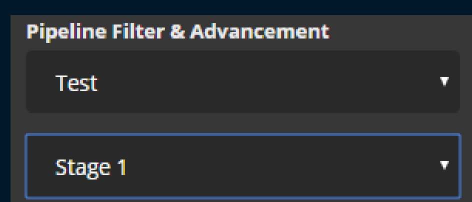



2.3. **Time:** Choose the date and time the list(s) will be sent through the flow. Click on this field, and a calendar dropdown will appear where you can select when you wish the campaign to be delayed until. If the time is already set, you can click the textbox containing the set time to change it unless the time has already passed. Click anywhere outside of the dropdown, the "X" button in the top right corner, or press the Enter button, to close the calendar.

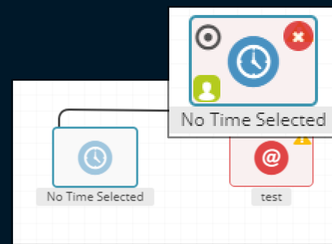
2.4. **Lists:** Choose the list(s) to be sent through the campaign. When you click the textbox in the Lists field, a dropdown will appear with the names of all existing contact lists. Click the name of the list(s) you want to send through the campaign to select them. If there are too many lists to display at once, search for a list by typing the name of the list into the field. The dropdown will show the search results. Selected lists will be bolded and will appear below the field once the dropdown is closed. To remove a list, click the red "X" button next to the list to delete.




2.5. **Pipeline Filter & Advancement:** Choose whether you would like contacts to progress through any pipelines you may have in the CRM. 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.

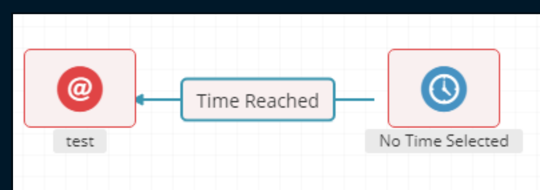


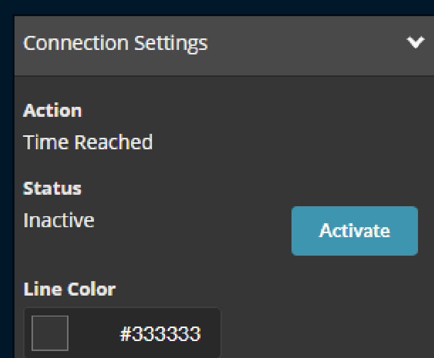

3. If an issue with the element setup needs to be resolved before the element can be activated, a yellow or red exclamation point symbol will appear in the top right corner of the element to signify this. If this is the case, when you select the element with your mouse, an additional section called Element 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.
4. To connect your Trigger List at Fixed Time element to another element in your campaign, click the black target icon in the top left corner of the element and drag it over to the element you wish to connect it. Connecting these elements means that contacts can now pass from one to the other automatically if they meet the necessary criteria determined in the next step.




[**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.]

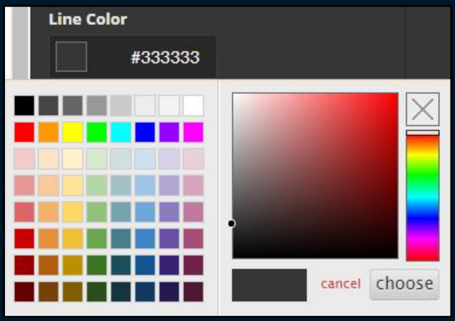
5. Once a connection has been established between the Trigger List at Fixed Time element and at least one other element (multiple connections can be created between one element and numerous others), a textbox with the connection type will appear on the connection. Click on this textbox to open a new Connection Settings section in the Settings Panel.
6. The Connection Settings section has four fields. The first is the Action field, which indicates the connection type (Time Reached).
7. The second field, the Description field, will display a short description of when contacts will pass through the connection.
8. 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.]

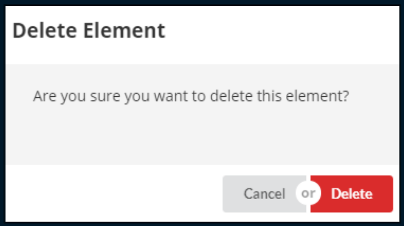
9. The last field is the Line Color field, where you can choose the color of that connection's line. **To choose a color:**




    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. You can choose your desired color from the pre-set swatches on the left side of the selector dropdown or use the right side to select 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.
10. To copy a connection, hover your mouse over the textbox appearing on the connection to show a blue button at the top left of the textbox. Copying a connection saves you 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.



11. Delete a connection by hovering over the connection's textbox and clicking the red "X" button.
12. To delete the Trigger List at Fixed Time element from the canvas, hover your mouse over the component 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.



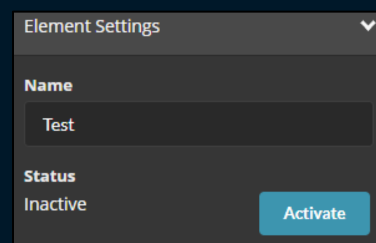

[**Note:** You will only receive the confirmation pop-up for deletion if the element has been activated or the campaign has been saved.]

## Check-In Access Point

Another starting point is the Check-In Access Point element. This element triggers a flow that is meant to begin with someone checking in at a location. By using a check-in QR code in a form, this element can trigger automation meant to follow up that check-in. For more information on setting up a Check-In QR Code, refer to the *SimplyCast Form User Guide.*

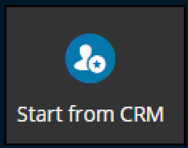
**To begin setting up this element:**

1. You can add a Check-In Access Point element by dragging and dropping it onto the workspace or double-clicking it. You will be prompted to name your Check-In element when you do so. You can finish creation by clicking the green "Create" button in the bottom right, or cancel by clicking "Close".
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:



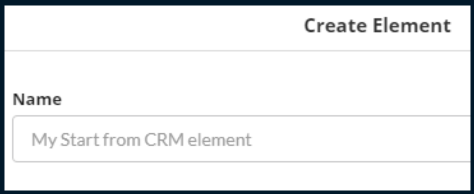

   2.1. **Name:** This field contains the name you selected when you added the element to the canvas. To change the name of your element, edit the name in the textbox provided.
   2.2. **Status:** This field is where you can activate or deactivate the element by clicking the blue or red button, respectively. Activating an element means it can be used as part of the campaign and should perform as expected.
   2.3. **Facility:** This field allows you to designate a facility using a prepared contact list that indicates who should be able to check in.
   2.4. **Pipeline Filter and 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 help you 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.

## Start from CRM

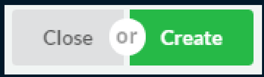



The Start from CRM element is the next drag-and-drop element in the Starting Points tab. This element allows you to start a SimplyCast 360 campaign from a contact's profile within the CRM.

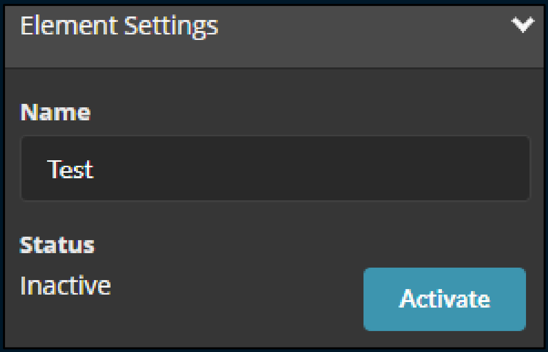
**To begin setting up this element:**




1. Click and drag the Start from CRM 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. Type the name into the textbox provided.



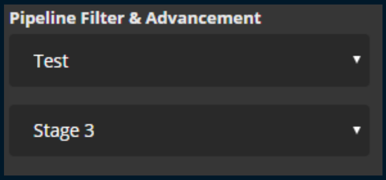

3. Click the green Create button to create the new element or click the gray Close button to close the sidebar without adding the new element.

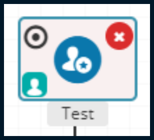



4. Once you have placed the element onto the canvas and have it selected with your mouse, three additional fields will appear in the Element Settings section on the right-hand side of your screen:
   4.1. **Name:** This field contains the name you selected when you added the element to the canvas. To change the name of your element, edit the name in the textbox provided.
   4.2. **Status:** This field is where you can activate or deactivate the element by clicking the blue or red button respectively. Activating an element means that the element will be able to be used as part of the campaign and should perform as expected.

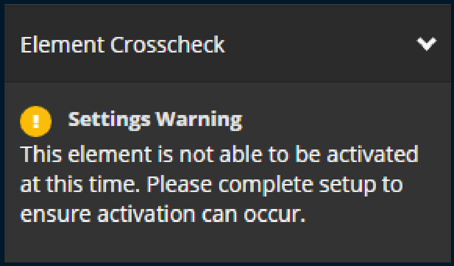
[**Note:** Remember the element will not become active until you save the campaign.]

4.3. **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 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.

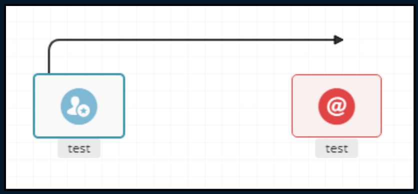



5. If an issue with the element needs to be resolved before the element can be activated, there will be a yellow or red exclamation point symbol in the top right corner of the element to signify this. If this is the case, when you select the element with your mouse, an additional section called Element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

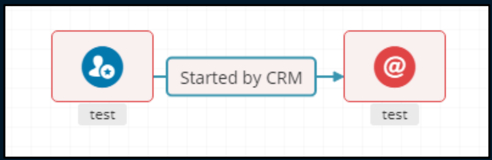



6. To connect your Start from CRM element to another element in your campaign, click the black target icon on the top corner of your element and drag it over to the element you wish to connect it to.

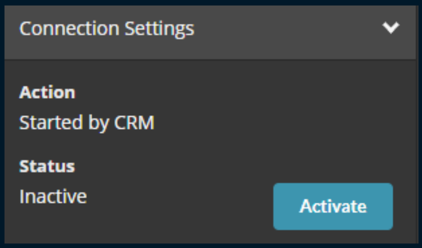



[**Note:** Some elements cannot be connected to each other. For example, you cannot connect two Starting Point elements to each other, and you cannot connect a Starting Point element to the Contact Changed, Start from CRM, or Inbound API elements.]

7. Once a connection has been established between the Start from CRM 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.

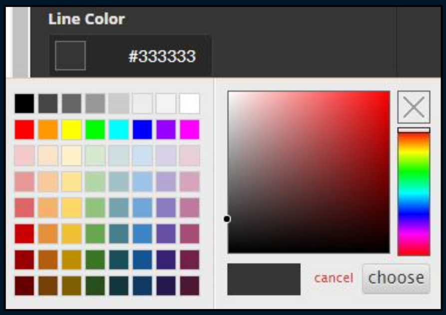


8. The first field is the Action field, which indicates the connection type (Started by CRM).
9. The second field, the Description field, will display a short description of when contacts will pass through the connection.
10. The next field is the Status field, where you can activate or deactivate the connection by clicking the blue or red buttons. 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.]

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



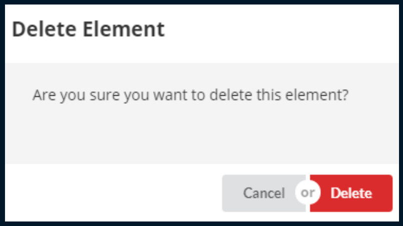

**To choose a color:**

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.

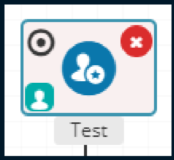
11.2. Choose your desired color from the pre-set swatches on the left side of the selector dropdown or use the right side to choose a color manually.

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 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.



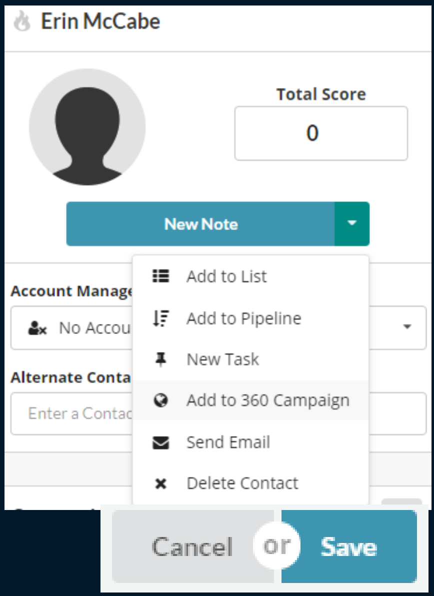

[**Note:** You will only receive the confirmation pop-up if the element has been activated or if the campaign has been saved.]

## Add a Contact to a SimplyCast 360 Campaign from the CRM

You may manually add a specific contact to a SimplyCast 360 campaign. You can do this from their contact profile in the CRM.

**From the contact profile:**

1. Navigate to the blue New Note button on the left side of the screen.
2. Click the arrow button on the right of this button to produce a dropdown menu.
3. Select the Add to 360 Campaign option in this menu. A sidebar will appear on the right side of the screen, and you will be asked to choose a SimplyCast 360 campaign to add the contact to.
4. Click the blue Save button at the bottom of the sidebar to add the contact to the campaign or click Cancel to close the sidebar without adding the contact to the SimplyCast 360 campaign.

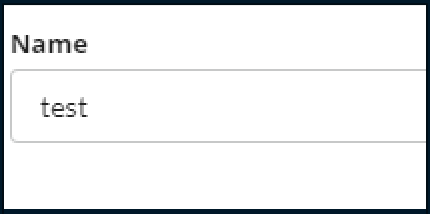



[**Note:** Only SimplyCast 360 campaigns that contain a Start from CRM element will appear in this dropdown menu. Contacts in the selected campaign will start from the Start from CRM element.]

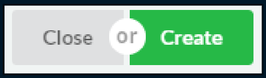
## Repeating Trigger


The next drag-and-drop element in the Starting Points tab is the Repeating Trigger element. A repeating trigger starts a campaign repeatedly at an interval that you set. This element allows you to trigger parts of your campaign at regular intervals automatically. This could be useful for regularly checking scores and tags, for example.

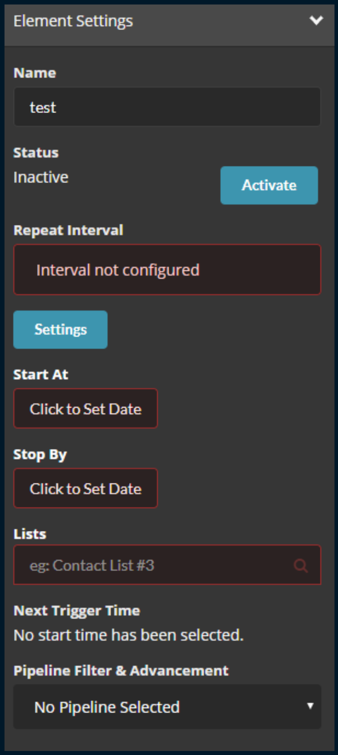
**To begin setting up your repeating trigger:**




1. Click and drag the Repeating Trigger element or double-click it to add it to your canvas.
2. A sidebar with a field asking you to enter a name for the new repeating trigger will appear when you place the element. Type the name into the textbox provided.




3. Click the green Create button to create the repeating trigger and close the pop-up window. Or, click the gray Close button to close the window without making a repeating trigger.

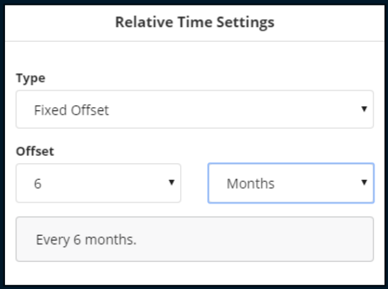



4. Once you have placed the Repeating Trigger element in your canvas and selected it with your mouse, eight fields will appear in the Element Settings section on the right side of the screen. **These are:**
   4.1. **Name:** The name you selected when you added the element to the canvas. To change the name of your element, edit the name in the textbox provided.
   4.2. **Status:** Activate or deactivate the element by clicking the blue or red buttons. Activating an element means that it can be used as part of the campaign and should perform as expected.

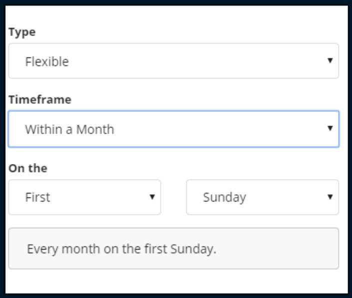
[**Note:** Remember the element will not become active or inactive until you save the campaign.]

4.3. **Repeat Interval:** This option has a blue Settings button to determine how often contacts will be sent through the SimplyCast 360 campaign. Clicking this button will open a sidebar where you can configure the interval you wish the repeating trigger to be activated. Select the type of interval you would like to use from the Type dropdown: Fixed Offset or Flexible.

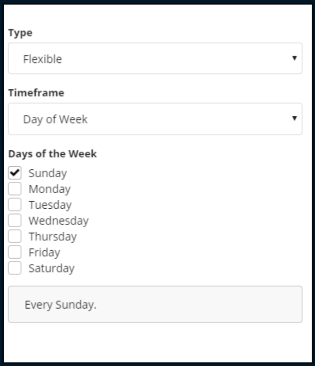
4.3.1. Fixed offset means that the repeating trigger will fire a fixed amount of time before the campaign will stop retriggering. Choosing Fixed Offset as your interval type will cause the Offset field to appear. This field includes two dropdowns and a textbox. Choose your unit of time from the dropdown on the right (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 interval you specified. For example, if you choose "Months" in the dropdown on the right and "6" on the left, the textbox will explain that the trigger will repeat every six months.



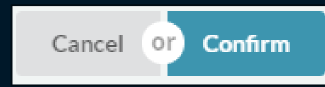

4.3.2. A flexible delay means the repeating trigger can be set to customized lengths, rather than a specific, fixed time. Choosing Flexible as your schedule type causes a Timeframe dropdown field to appear. In this field, decide whether you want the trigger to repeat on certain days of the week or specific days within a month.



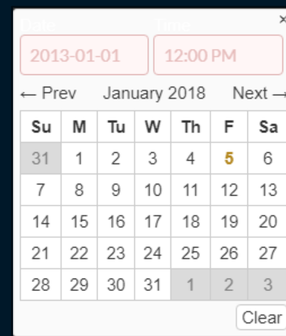

4.3.3. Selecting the Day of Week option will cause a Days of the Week field to appear where you must select the days of the week you wish the trigger to be repeated. Selecting the Within a Month option will cause two new fields to appear. In the first field, you will choose the week of the month you wish the trigger to be repeated, and in the second field, you will select the day of the week. The textbox below will describe the interval configured.



5. Once you have determined your interval type and have selected the timeframe to use with your repeating trigger, click the blue Confirm button to save your settings and close the sidebar, or click the Cancel button to close the sidebar without configuring your time settings.

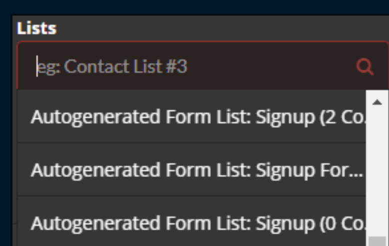



6. **Start At:** Choose the date you wish to repeat the trigger. Click the Click to Set Date textbox and a calendar will appear to select the date and time to start the repeating trigger. Click anywhere outside the calendar to close the dropdown and confirm the calendar settings. Click the Clear button to close the pop-up without saving your calendar or clearing any existing settings.

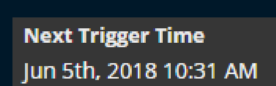



7. **Stop By:** Choose the date to stop the repeating trigger. Click the Click to Set Date textbox, and a calendar will appear to select the date and time. Click anywhere outside the calendar to close the pop-up and confirm the calendar settings or click the Clear button to close the pop-up without saving your calendar settings or clearing any existing settings.

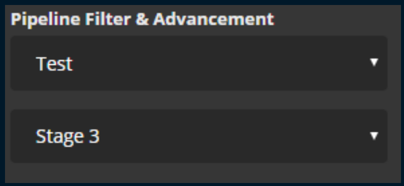
8. **Lists:** Select one or multiple contact lists to send through the repeating trigger. To search for a specific list, click the textbox provided and start typing the name of the list you'd like. The search results will automatically begin to filter. Click the name of your chosen list(s) to select them; selected contact lists will have their names bolded. Click anywhere outside the textbox to close the dropdown, and the chosen contact lists will be displayed below the textbox. To remove any of your chosen lists, click the red "X" beside the name of the list you would like to remove.



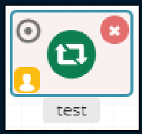

9. **Next Trigger Time:** This field will display the next time the repeating trigger will occur based on what was chosen in the Repeat Interval, Start At, and Stop By fields. If no selections have been made in these fields, the Next Trigger Time field will state "No start time has been selected."

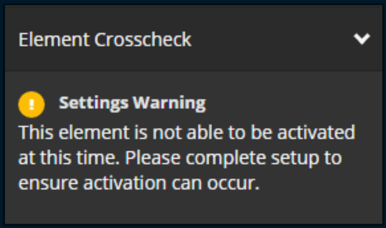


10. **Pipeline Filter and Advancement:** Choose whether you would like contacts to progress through any pipelines you may have associated with the campaign. In the dropdown menu in this field, choose the pipeline to which you would like contacts to be added. A second dropdown will appear to select the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

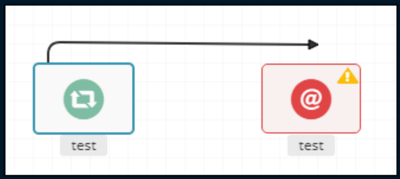



11. If an issue with the element setup needs to be resolved before the element can be activated, a yellow or red exclamation point symbol will appear in the top right corner of the element to signify this. If this is the case, when you select the element with your mouse, an additional section called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



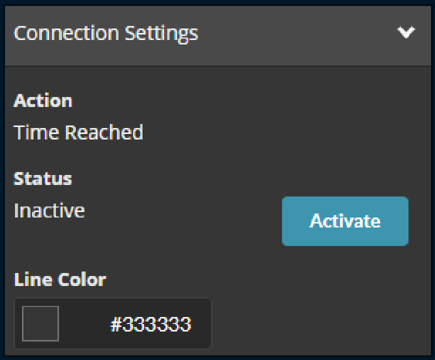




12. To connect your Repeating Trigger element to another element in your campaign, click the black target image on the top left corner of the element and drag it over to the element you wish to connect it to.




[**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.]

13. Once a connection has been established between the Repeating Trigger 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 on the right-hand side of the screen.



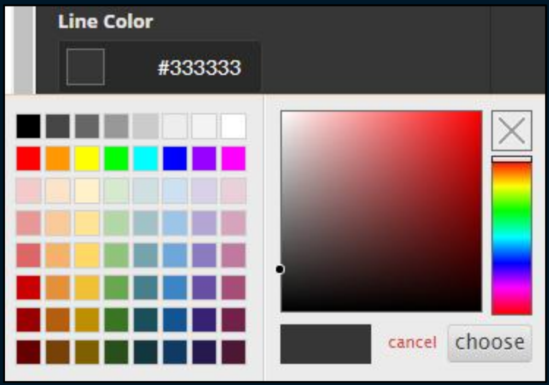

14. The Connection Settings section has four fields. The first is the Action field, which indicates the connection type (Time Reached).

15. The second field, the Description field, will display a short description of when contacts will pass through the connection.

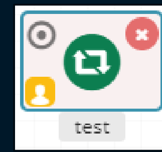
16. The following field is the Status field, where you can activate or deactivate the connection by clicking the blue or red button, respectively. Activating a connection means it can be used as part of the campaign and should perform as expected.


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

17. The last field is the Line Color field, where you can choose the color of that connection's line. **To choose a color:**
    17.1. 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.
    17.2. You can 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.
    17.3. 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.

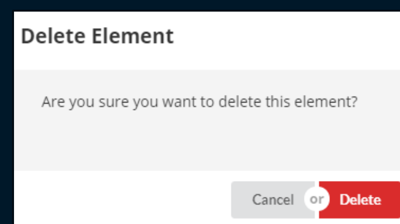


18. To copy a connection, hover your mouse over the textbox appearing on the connection to show a blue button at the top left of the textbox. Copying a connection saves you time by preventing you from having to reconfigure the settings for any additional connections requiring the same conditions. Click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



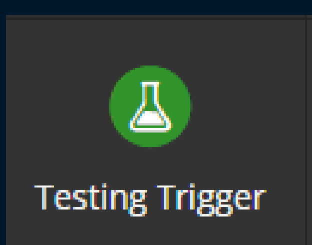

19. Delete a connection by hovering over the connection's textbox and clicking the red "X" button.


20. To delete an element from the campaign, hover your mouse over the component 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 for deletion if the element has been activated or if the campaign has been saved.]

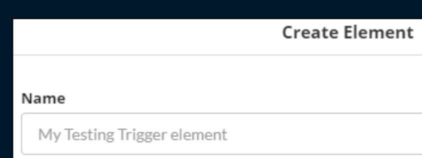
## Testing Trigger



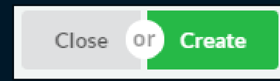

The next drag-and-drop element in the Starting Points tab is the Testing Trigger element. This element allows you to send a selection of contacts through the SimplyCast 360 campaign to test the campaign before sending your entire list(s) of contacts through it to ensure all elements behave as expected.

**To begin setting up this element:**

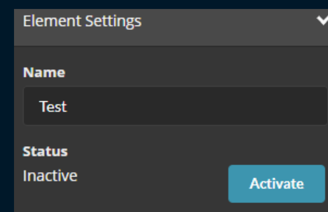
1. Click and drag the Testing Trigger element or double click it to add it to your canvas.
2. When you place the element, a sidebar will appear with a field that will ask you to enter a name for the new testing trigger. Type the name into the textbox provided.



3. Click the green Create button to save your settings, add the element to the canvas, and close the sidebar. Or, click the gray Close button to close the sidebar without adding the Testing Trigger element.



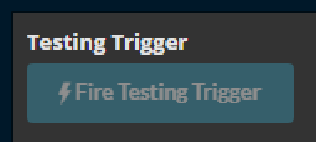

4. Once you have placed the element onto your canvas and have it selected with your mouse, four fields will appear in the Element Settings section in the Settings Panel on the right-hand side of the screen:
    4.1. **Name:** The name you selected when you added the element to the canvas. To change the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



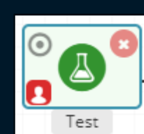

    4.2. **Status:** Activate or deactivate the element by clicking the blue or red button, respectively. Activating an element means that it will be able to be used as part of the campaign and should perform as expected.

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

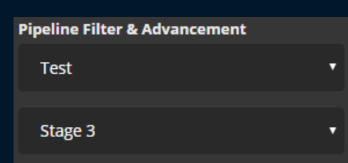
    4.3. **Testing Trigger:** Clicking the blue Fire Testing Trigger button in this field will cause a sidebar with a table of contact lists to choose from to send through the campaign using the testing trigger element. Refer to the next section to learn how to set up and fire the Testing Trigger.




[**Note:** Keep in mind you will only be able to click this button once all elements connected to the Testing Trigger elements are activated and the campaign has been saved.]

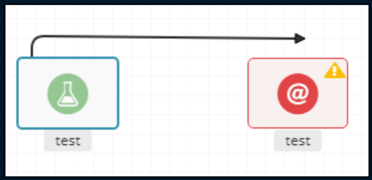



    4.4. **Pipeline Filter & Advancement:** Choose whether you would like contacts to progress through any pipelines you may have associated with the campaign. In the dropdown menu in this field, choose the pipeline to which you would like contacts to be added. A second dropdown will appear to select the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

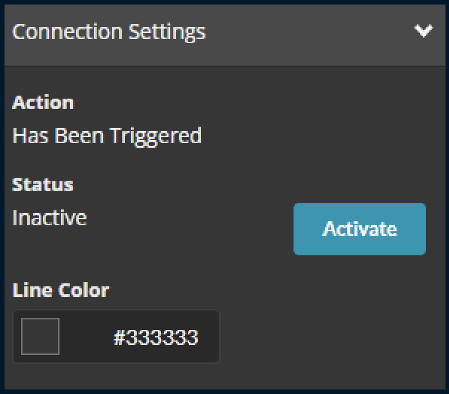
5. To connect your Testing Trigger element to another element in your campaign, click the black target image on the top left corner of the element and drag it over to the element you wish to connect it to.




[**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.]

6. Once a connection has been established between the Testing Trigger 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 on the right-hand side of the screen.

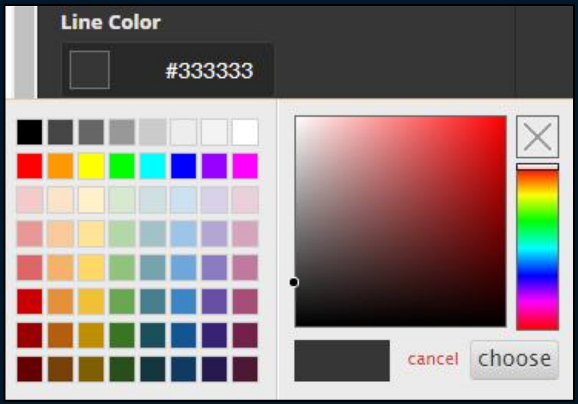

7. There are four fields in the Connection Settings section. The first field is the Action field, which indicates the connection type (Has Been Triggered).



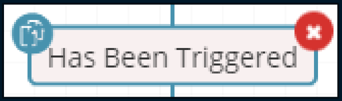

8. The second field, the Description field, will display a short description of when contacts will pass through the connection.
9. The next field is the Status field, where you can activate or deactivate the connection by clicking the blue or red button, respectively. Activating a connection means that 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.]

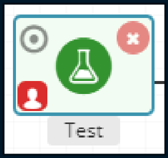
10. The last field is the Line Color field, where you can choose the color for that connection's line. **To choose a color:**
    10.1. Click on the color square in the field, and a color selector will appear, or enter the hex code of the color in the field next to the square.
    10.2. You can choose 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.
    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.



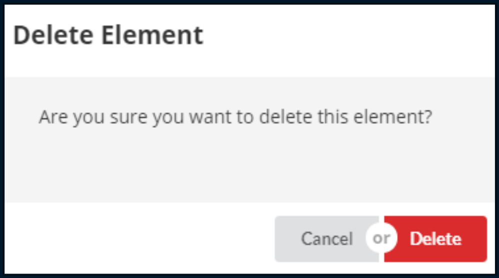

11. To copy a connection, hover your mouse over the textbox appearing on the connection to show a blue button at the top left of the textbox. Copying a connection saves you time by preventing you from reconfiguring the settings for any additional connections requiring the same conditions. Click and drag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




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



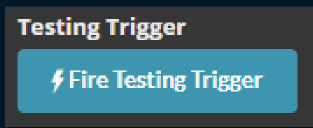

13. To delete the element from the campaign, hover your mouse over the element and click the red "X" button in the top right corner. A pop-up window will appear asking you to confirm the deletion.
14. Click the red Delete button to complete the deletion or Cancel to close the window without deleting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




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

## *Fire a Testing Trigger*

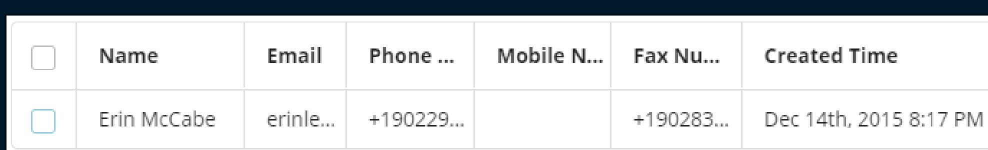



The Testing Trigger element can be triggered manually if the SimplyCast 360 project and all relevant elements have been activated, so that the blue Fire Testing trigger button in the Settings Panel is active.

**To fire the Testing Trigger element:**

1. Select the Testing Trigger element in the SimplyCast 360 project. The blue Fire Testing Trigger button in the Settings Panel will now be clickable.
2. Once the button is clicked, a sidebar will appear containing a table of all contacts in the account's CRM that can be selected to test the campaign.


3. **There are six information fields available in this table:**
   3.1. **Name:** The name of the contact (if available)
   3.2. **Email:** The email address of the contact (if available)
   3.3. **Phone Number:** The phone number of the contact (if available)
   3.4. **Mobile Number:** The mobile phone number of the contact (if available)
   3.5. **Fax Number:** The fax number of the contact (if available)
   3.6. **Created Time:** The date and time the contact was created in the CRM

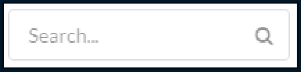


| | Name | Email | Phone ... | Mobile N... | Fax Nu... | Created Time |
|---|---|---|---|---|---|---|
| | Erin McCabe | erinle... | +190229... | | +190283... | Dec 14th, 2015 8:17 PM |

4. Select one or more contacts by checking off the boxes next to the contact names. Once a contact has been selected, two additional buttons will appear above the table of contacts: View Contact and Trigger Contacts.

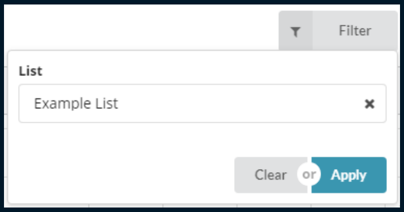

[**Note:** Only the blue Trigger Contacts button will become available if multiple contacts have been selected.]

5. The blue View Contact button will direct you to the contact's CRM profile if selected. Refer to the *SimplyCast CRM User Guide* for more information about the CRM and contact profiles.
6. The blue Trigger Contacts button will activate the Testing Trigger element and send the chosen contact(s) through the SimplyCast 360 flow when clicked.
7. Search for contacts using the search bar at the top of the table or use the page numbers at the bottom of the table to proceed to the next page of contact lists.



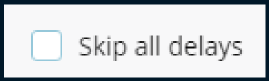


8. Filter contacts by list by clicking the gray Filter button next to the search bar and selecting a list from the dropdown menu that appears. Click Apply, and the contacts will be filtered according to the chosen list's contents. Clear the filter by clicking the now green Filter button and selecting Clear.



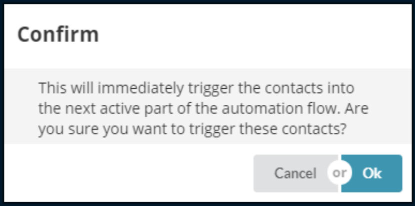

9. Sort the contact lists in this table by date created by clicking the name of the Created Time column. The lists will be sorted chronologically.


10. Check off the Skip all Delays option at the top of the contact table if you want the contacts to pass through the SimplyCast 360 campaign without adhering to any delays that may be in the flow. Each delay will be reduced to 10 minutes or less.




[**Note:** Not checking off this box means that any contacts sent through the campaign using the Testing Trigger will respect all delay settings and won't move on until the set time interval has been reached. For testing purposes, the Skip all Delays option should be selected.]


11. Once you have a contact(s) selected and determined the delay settings, click the blue Trigger Contacts button, and a pop-up window will appear asking you to confirm the trigger activation. Click the blue OK button to activate the trigger or cancel to close the pop-up without sending the contact(s) through the SimplyCast 360 campaign.

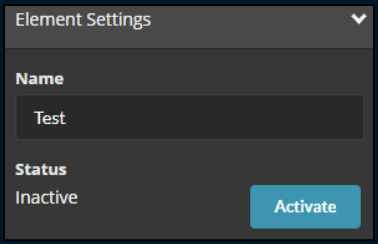


## Project Published

If you need to trigger automation based on the publishing of another project, you can use the Project Published element. This element begins a campaign based on the completion and publication of another component of the workspace, and it is currently restricted to Form projects. You can use this to notify others when a form has gone live, or to begin promoting that form to contacts. It can be used internally or externally and acts only as a catalyst to start a communication flow.

**To begin setting up this element:**

1. You can add a Project Published element by dragging and dropping it onto the workspace or double-clicking it. You will be prompted to name your Project Published element when you do so. You can finish creation by clicking the green "Create" button in the bottom right or cancel by clicking "Close".
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:



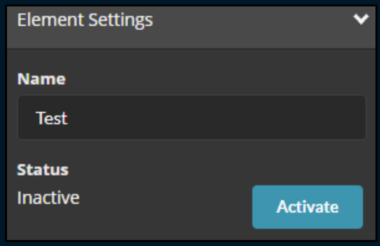

   2.1. **Name:** This field contains the name you selected when you added the element to the canvas. To change the name of your element, edit the name in the textbox provided.
   2.2. **Status:** This field is where you can activate or deactivate the element by clicking the blue or red button, respectively. Activating an element means that it will be able to be used as part of the campaign and should perform as expected.
   2.3. **Project Type:** This field allows you to choose the type of project you want to trigger this campaign. For now, only Form is available.
   2.4. **Pipeline Filter and 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.

## Blueprint Instance Triggered

Finally, Blueprint Instance Triggered is a starting point that monitors a blueprint entity and triggers an automation campaign when trigger conditions are met. This element does not monitor changes but is activated when a specific trigger's conditions are met. For more information, please refer to the *SimplyCast Blueprint Trigger User Guide*.

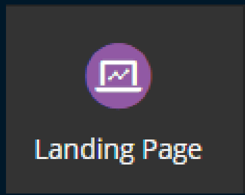
**To begin setting up this element:**

1. You can add a Blueprint Instance Triggered element by dragging and dropping it onto the workspace or double-clicking it. You will be prompted to name your Blueprint Instance Triggered element when you do so. You can finish creation by clicking the green "Create" button in the bottom right, or cancel by clicking "Close".
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 you selected when you added the element to the canvas. To change the name of your element, edit the name in the textbox provided.
   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 it will be able to be used as part of the campaign and should perform as expected.
   2.3. **Blueprint Entity:** This field allows you to designate the entity on which the trigger is located, thereby designating this campaign as the target for that trigger.
   2.4. **Pipeline Filter and 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.

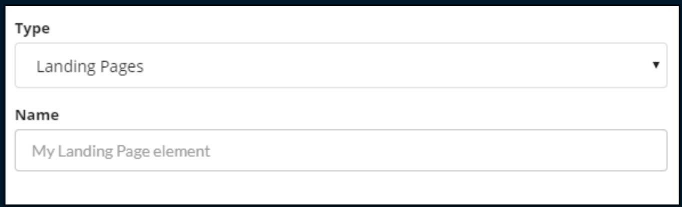
## Landing Page



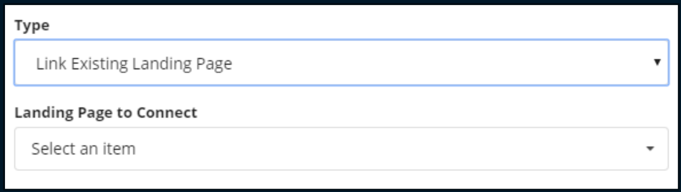

The Landing Page element is the next drag-and-drop element in the Starting Points tab. This element allows you to create a webpage accessible by clicking on a link on a website or in an email. The webpage contains a form that visitors can use to sign up for communications or to receive further information.

**To begin setting up your landing page:**

1. Click and drag the Landing Page element or double-click it to add it to the canvas.
2. When you place the element, a sidebar will appear from the right with Type and Name fields.
3. In the Type field, select from the available dropdown menu whether to create a new landing page for this element or use an existing landing page in the SimplyCast platform.

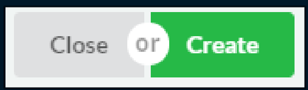



   3.1. To create a new landing page, select the Landing Pages option and enter the new page's name in the Name field below the Type field.

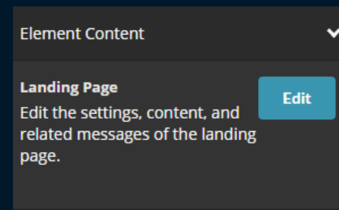



   3.2. To use an existing landing page, choose the Link Existing Landing Page option in the Type field. The Name field that appears typically below the Type field will be replaced with a new field: Landing Page to Connect. In this dropdown menu, choose the existing landing page to attach to the Landing Page element.

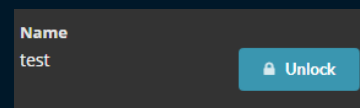
4. Once you have named your new landing page or chosen an existing one, click the green Create button to add the element and close the sidebar. Or click the gray Cancel button to close the sidebar without adding the element.




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




5.1. **Landing Page:** In the Element Content section, there is a blue Edit button across from the Landing Page option. When clicked, it will bring you to the Landing Page application. Here, you can edit the landing page's content and settings. Refer to the *SimplyCast Landing Page User Guide* for more information about creating and editing landing pages.

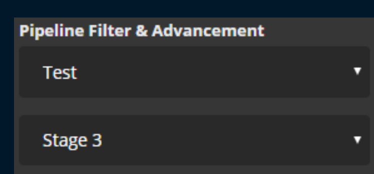



5.2. **Name:** This field in the Element Settings section contains the name selected when the element was added to your canvas. By default, the landing page's name is locked. To unlock and change it, click the blue Unlock button, then edit the page name in the textbox provided.

[**Note:** Keep in mind that changing the name of a landing page changes its name across the entire SimplyCast platform, not just this campaign. For example, one landing page can be the starting point for multiple SimplyCast 360 campaigns; therefore, if it is renamed in one campaign, the new name will also appear in every other campaign it is found in.]

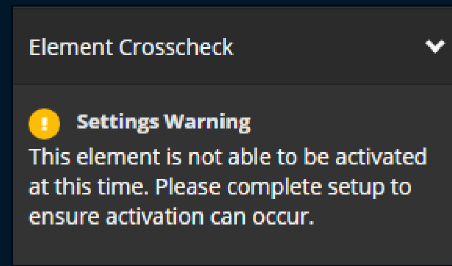
5.3. **Status:** This field is where you can activate or deactivate the element by clicking the blue or red button, respectively. Activating an element means it can be used as part of the campaign and should perform as expected.

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

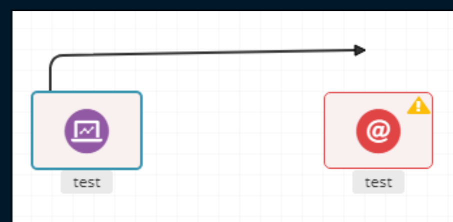



5.4. **Pipeline Filter & Advancement:** Choose whether you would like contacts to progress through any pipelines you may have associated with the campaign. In the dropdown menu in this field, choose the pipeline to which you would like contacts to be added. A second dropdown will appear to select the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

6. If an issue with the element setup needs to be resolved before the element 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 component and provide instructions on how to resolve it.

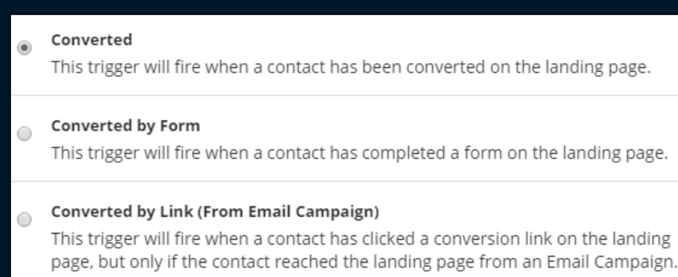


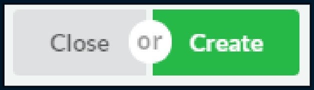

7. To connect your Landing Page element to another element in your campaign, click the black target icon in the top right corner of the element and drag it over to the component you wish to connect it to.



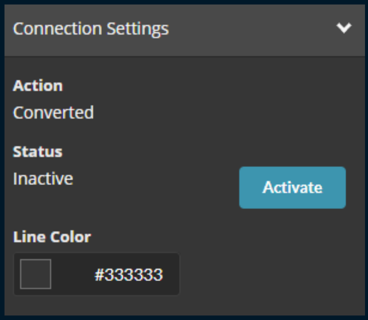

[**Note:** Some elements cannot be connected to each other. For example, you cannot connect two Starting Point elements to each other, and you cannot connect a Starting Point element to the Contact Changed, Start from CRM, or Inbound API elements.]

8. A sidebar will appear where you can choose between three connection types:
    - 8.1. **Converted:** This trigger will fire when a contact has been converted on a landing page (link clicks, form submissions, and any other action specified as a conversion event when the landing page is created. Refer to the *SimplyCast Landing Page User Guide* for more information about conversion events.)
    - 8.2. **Converted by Form:** This trigger will fire when a contact has completed a form on the landing page.
    - 8.3. **Converted by Link (From Email Campaign):** This trigger will fire when a contact has clicked a conversion link on the landing page if they reached the page via an email.

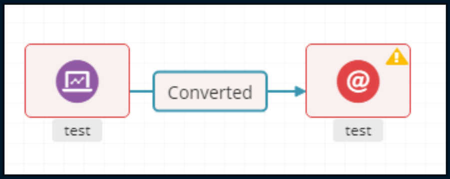





9. Click the green Create button to connect the two elements or the gray Close button to close the sidebar without connecting the two elements.



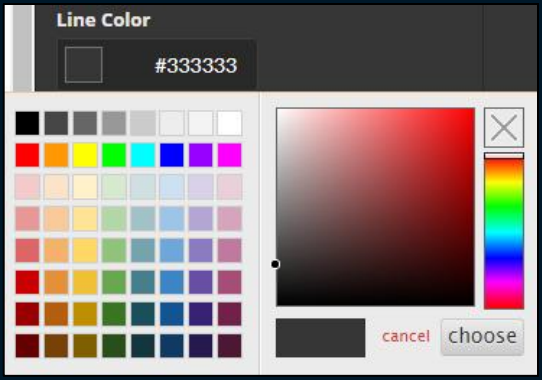

10. Once a connection has been established between the Landing Page element and at least one other element, a textbox with the connection type will appear on the line. Click on this textbox to open a new Connection Settings section on the right-hand side of the screen.
11. The Connection Settings section has three fields. The first is the Action field, which indicates the connection type (Converted, Converted by Form, or Converted by Link).
12. The second field, the Description field, will display a short description of when contacts will pass through the connection.




13. 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 can be used as part of the campaign and should perform as expected.

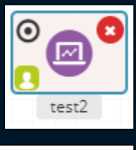
[**Note:** Remember the connection will not become active until you save the campaign.]

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

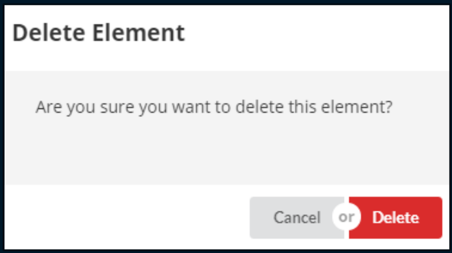



    14.1. Click on the color square in the field, and a color selector will appear, or enter the hex code of the color in the field next to the square.
    14.2. You can choose your desired color from the pre-set swatches on the left side of the selector dropdown or use the right side to select a color manually.
    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 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.



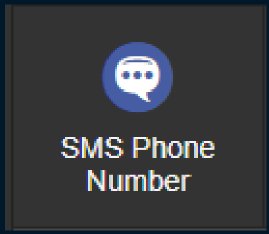

16. Delete a connection by hovering over the connection's textbox and clicking the red "X" button.




17. To delete an element from the campaign, hover your mouse over the component 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 if the campaign has been saved.]

## SMS Phone Number



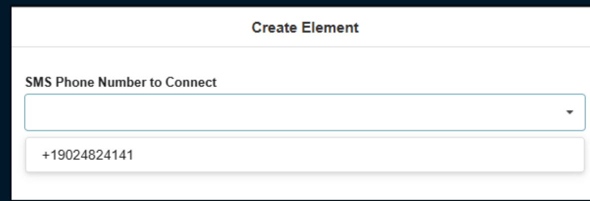

The next drag-and-drop element in the Starting Points tab is the Shortcode Keyword element. This element allows you to take in SMS messages from clients to trigger the SimplyCast 360 campaign. A keyword can be set, or the element can respond to any input from a contact.

[**Note:** You will not see this starting point option without an SMS subscription.]

**To begin setting up this element:**

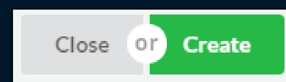
1. Double-click or click and drag the SMS Phone Number element onto your canvas.

2. When you place the element, a drawer will open to select the phone number you will use to receive messages. Select one of the SMS numbers associated with your SimplyCast account from the dropdown menu provided.




[**Note:** If no number options exist in the dropdown menu, none have been created in the account yet. Please contact your Account Manager to acquire an SMS number for this element.]

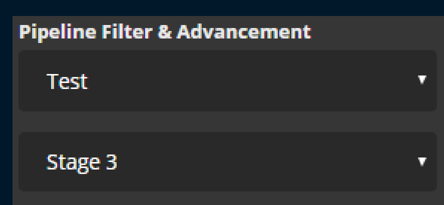
3. Click the green Create button to create the element and close the sidebar, or click the gray Close button to close the sidebar without adding the element.



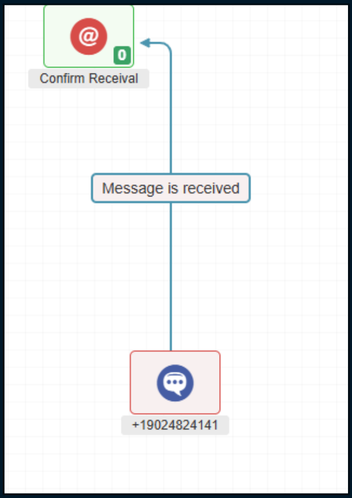

4. Once you have placed the element onto your canvas and have it selected with your mouse, three additional fields will appear in the Settings Panel:
   4.1. **Name:** This field displays the name of the element selected and cannot be edited.
   4.2. **Status:** This field is where you can activate or deactivate the element by clicking the blue or red button, respectively. Activating an element means that 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.]

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

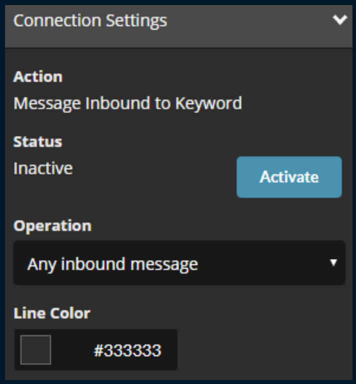


6. To connect your SMS Phone Number element to another element in the campaign, click the black target icon located on the top corner of the element and drag it over to the element you wish to connect it to.




7. Once a connection has been established between the SMS Phone Number 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.

8. The Connection Settings section has five fields. The first field is the Action field, which indicates the connection type (Inbound message to phone number).



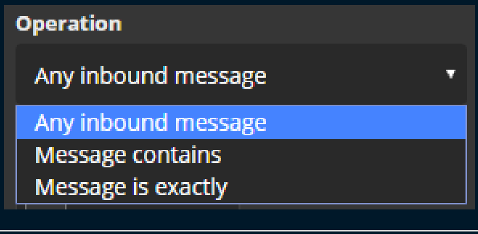

9. The second field is the Description field, which will briefly describe how this element adds contacts to the campaign.

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

11. The following field is the Operation field, where you will select the conditions the inbound message must comply with to trigger the connection. Select one of these four options from the dropdown provided:

    11.1. **Any inbound message:** Any inbound message, regardless of content, will trigger the connection.

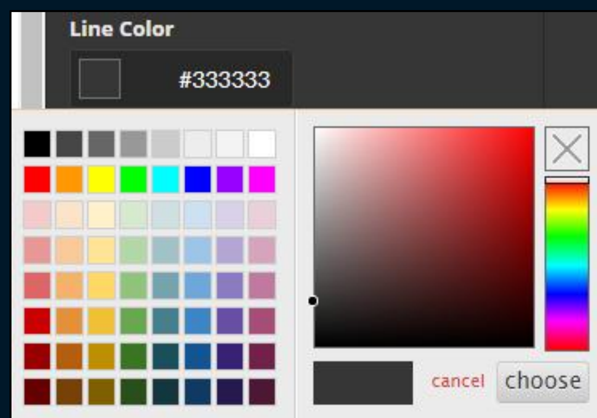


11.2. **Message contains:** This option will open a textbox where you must enter a word or phrase. Inbound messages must contain that word or phrase to trigger the connection.

11.3. **Message is exactly:** Selecting this option will open a textbox where you must enter a word or phrase. Only inbound messages containing this exact text will trigger the connection.

11.4. **Message begins with:** This option triggers the campaign if a message with a specific phrase at the beginning is received.

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

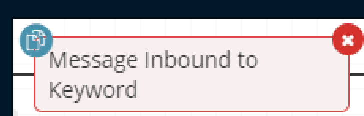



12.1. **To choose a color:**

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

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

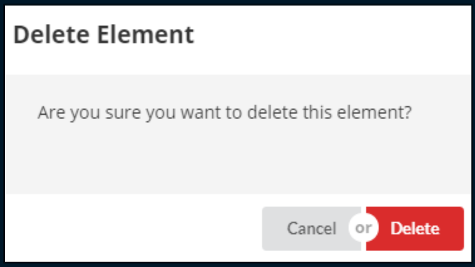
12.4. Click the Choose button at the bottom right side of the color selector to lock in your color or click Cancel to close the selector dropdown without picking a color.




13. 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.

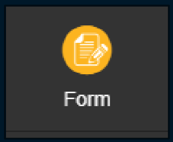
14. Delete a connection by hovering over the connection's textbox and clicking the red "X" button.

15. 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.]

## Form




The next drag-and-drop element in the Starting Points tab is the Form element. This element allows you to create a signup form that can be hosted on a website, landing page, or stand alone as a shareable URL. It is a valuable tool for collecting contact information.

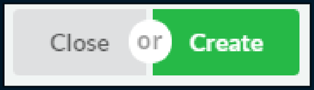
**To begin setting up this element:**

1. Click and drag the Form element or double-click it to add it to your canvas.
2. When you place the element, a sidebar will appear with two fields: Type and Name.
3. In the Type field, select whether to create a new signup form for this element or a quiz-type one from the available dropdown menu.


3.1. To create a new form, select the "Form" option and enter the name of the new form in the Name field below the Type field.

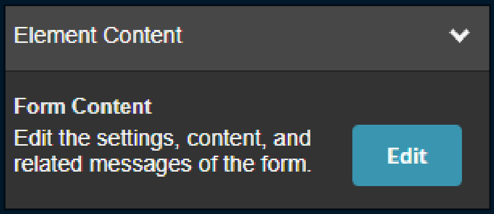
3.2. To create a Quiz, choose the Quiz option in the Type field. Then fill out the Name field as described above.

4. Once you have named your new form or quiz, click the green Create button to add the element and close the pop-up window. Or, click the gray Close button to close the drawer without adding a form.



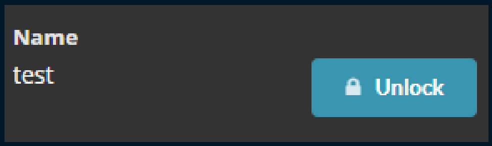

5. Once you have placed the element on the canvas and have it selected with your mouse, two additional fields will appear in the Settings Panel on the right-hand side of the screen:

    5.1. **Element Content:** The element content tab allows you to edit your new form project. To learn more about editing form projects, please refer to the *SimplyCast Form User Guide.*



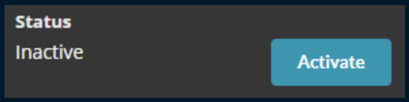

    5.2. **Element Settings:** The Element Settings tab contains tools that you will use to alter the element itself on the canvas. This includes changing settings such as:

        5.2.1. **Name:** This field displays the name of the element selected and cannot be edited.



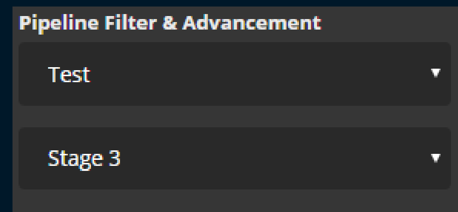

[**Note:** Keep in mind that changing the name of a form changes its name across the entire SimplyCast platform, not just this campaign. For example, one form can be the starting point for multiple SimplyCast 360 campaigns; therefore, if it is renamed in one campaign, the new name will also appear in every other campaign it is found in.]

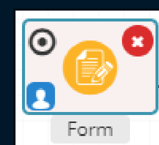
        5.2.2. **Status:** This field is where you can activate or deactivate the element by clicking the blue or red button, respectively. Activating an element means that the element will be able to be used as part of the campaign and should perform as expected.




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

6. **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.

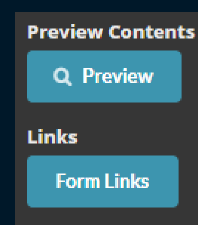


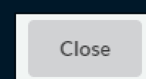




7. Once the form has been created and configured, you will see two more fields in the Element Settings section: Preview Contents and Links.

   7.1. **Preview Contents:** Clicking the blue Preview button will open a sidebar with a preview of the form. Click the gray Close button to close the Preview sidebar.

   7.2. **Links:** Clicking the blue Form Links button will open a sidebar containing the URL and code for the form that can be included in emails or embedded on a website. Copy and paste these links as needed. Click the gray Close button to close the Links sidebar. Refer to the next section in this guide for more information about the different links in this sidebar.

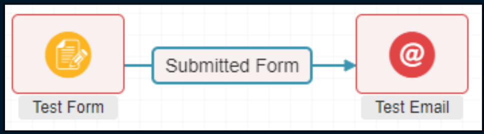


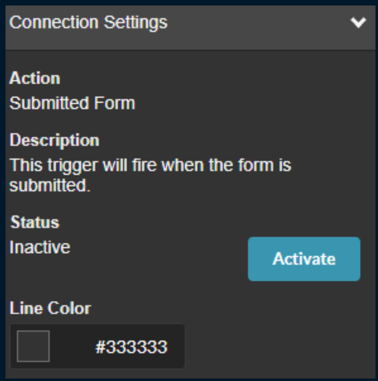

   7.3. To connect your Form element to another element in your campaign, click the black target image at the top right corner of the element and drag it over the element you wish to connect it to.

[**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.]

8. Once a connection has been established between the Form element and at least one other element, a textbox with the connection type will appear on the line: Submitted Form. Click on this textbox to open a new Connection Settings section on the right-hand side of the screen.




9. The Connection Settings section has four fields. The first is the Action field, which indicates the connection type (Submitted Form), meaning someone submitted information using the form.

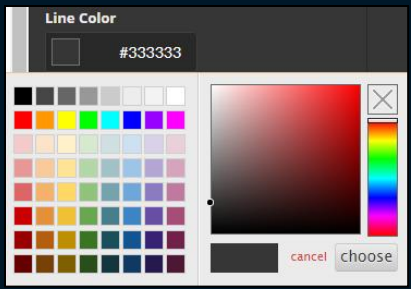



10. The second field is the Description field, which will display a short description of when contacts will pass through the connection.

11. The next field is the Status field, where you can activate or deactivate the connection by clicking the blue or red button, respectively. Activating a connection means 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.]

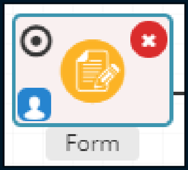
12. The last field is the Line Color field where you can choose the color for that connection's line. **To choose a color:**



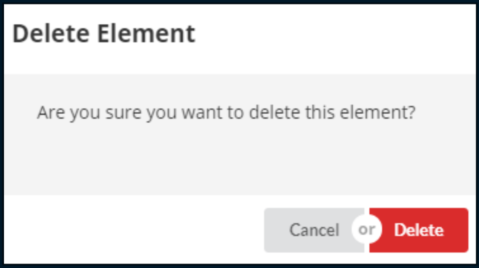

    12.1. Click on the color square in the field and a color selector will appear or enter the hex code of the color in the field next to the square.
    12.2. Choose your desired color from the pre-set swatches on the left side of the selector dropdown or use the right side to manually choose a color.
    12.3. 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.

13. 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 icon 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.


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




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




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

### *Form Links*

Form links allow you to share your form with users. This information is provided in two ways: URLs and code. The URL provides a direct link to your form that you can share with users in emails, on social media, and through other communications. The code provided allows you to embed the form on a webpage.

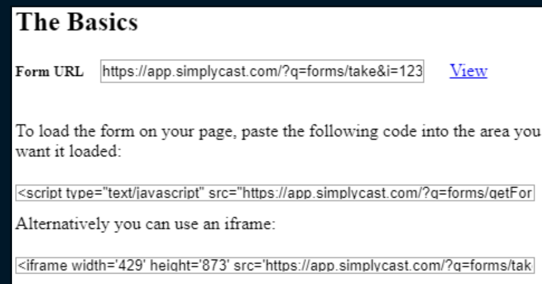
**To obtain the project code for an existing form campaign:**

1. Locate and click on the blue Form Links button in the Settings Panel once you have set up the form.

**Once you have clicked the button, a sidebar will appear with two sections in it:**

### *The Basics*

**This section in the Links sidebar allows you to do four things:**




1. Copy the form URL found in the first field and paste it into your browser. The form will appear on its own. You can share this link directly.
2. Preview the form by clicking the blue View link beside the Form URL field.
3. Copy the form's code found in the second field of the Links sidebar to paste to the area on your web page where you want the form to appear.
4. Or, copy the iframe (inline frame) code in the third sidebar field to paste onto your website.

[**Note:** The two code options should only be used by users with knowledge of web design.]

### *Modal Form*

A modal form is essentially a form that appears as a pop-up window on your web page. For more information on modal forms, refer to the Modal Form section in the *SimplyCast Form Builder & Survey User Guide*.

**The Modal Form section in the Links sidebar allows you to do five things:**

1. Edit your modal form settings in the Form Builder by clicking on the blue Click Here link, which will take you to the form configuration page.
2. Copy the code found in the first field of the Modal Form section in the sidebar and paste it into your web page to create a modal form.


3. Have your modal form open up on your web page at the click of a button by copying the code from the second field in the Modal Form section of the sidebar and adding it to the “<a>” tag of the code from the first field in this section on your page.
4. Obtain the QR (quick response barcode) code for your form in three available sizes by clicking on any blue hyperlinks for the words Small, Medium, or Large at the bottom of the Modal Form section in the Links sidebar.

5. You can share your form via Facebook, LinkedIn, or Yahoo by clicking on the corresponding icon at the bottom of the Links sidebar.

[**Note:** If you know web design, the above options are readily available. If not, provide someone with the knowledge of these options, and they should be able to assist you with the required coding.]