



**Powering Automation, Igniting Growth for Smarter
Connections**

SimplyCast 360

Automation Flow Editor Templates User Guide



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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.

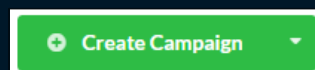
Automation Flow Editor Overview

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.

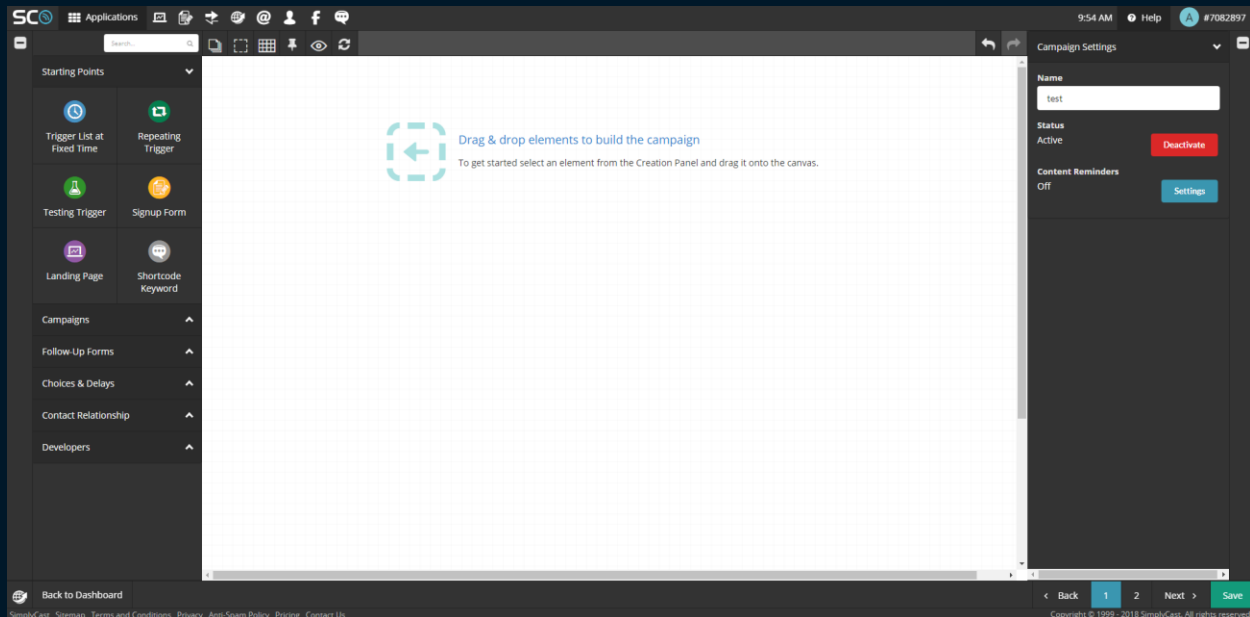
2. A pop-up will appear where you will be asked to name the campaign. Type the name into the textbox provided.
3. Click the green Create button to create the campaign, close the sidebar, and be redirected to the Automation Flow Editor.
 - a. Or click Cancel to close the pop-up without creating a campaign.

Create New Campaign

Name Your Campaign

eg. My Automation Campaign

Cancel or Create



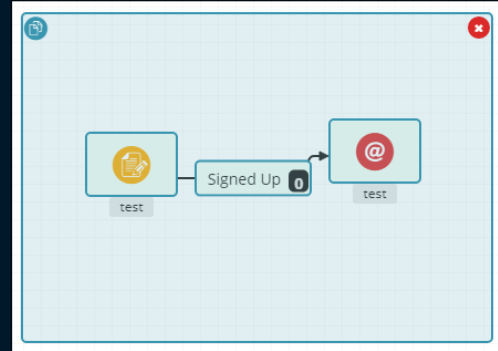
The Automation Flow Editor is divided into four main sections: the settings panel, the creation panel, the navigation bar, and the canvas.

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:

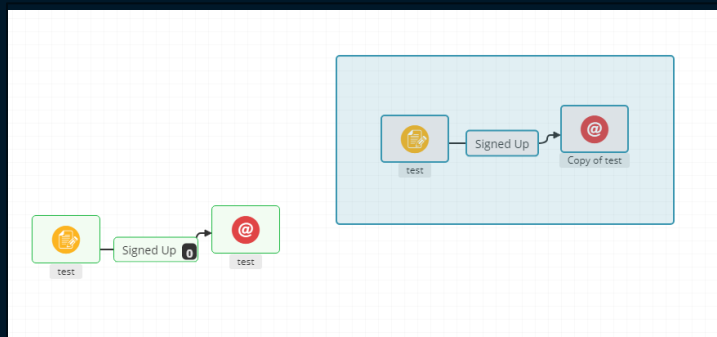
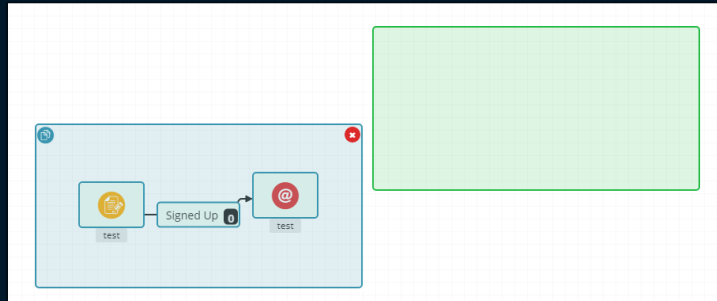
1. Click and hold the mouse down on a blank section of the canvas and drag the mouse to create a blue box.
2. Drag the mouse until the blue box covers all the elements you want highlighted, then release the mouse.



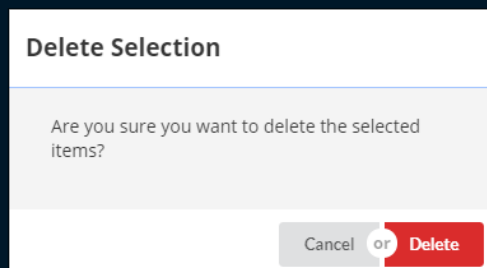
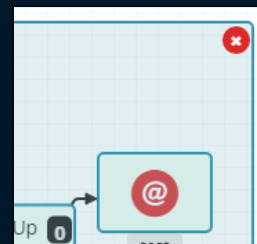
When you hover your mouse over a highlighted section of the canvas, you will see two new icons appear in the top corners of the blue box. On the left is a Copy All Selected icon, which allows you to create a second copy of the highlighted section in the canvas.

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.



- 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.



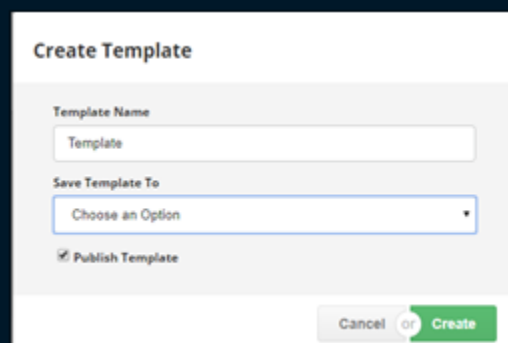
The last thing you can do with highlighted sections is move them around the canvas; this simultaneously moves all the highlighted elements, widgets, and connections as a block. To do this, click and hold the mouse down anywhere inside the highlighted section, and drag and drop the section around the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

Templates

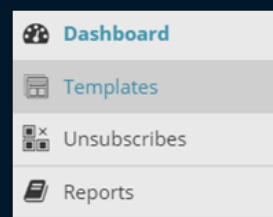
Templates are copies of existing SimplyCast 360 campaigns, with all the elements and connections intact. You can use templates as a base to create similar campaigns in the future without needing to build it from scratch.

To create a template from an existing SimplyCast 360 campaign (if you have permission):

- Locate the blue Edit button on the far-right side of the screen across from the corresponding campaign name on the SimplyCast 360 Dashboard and click the dropdown arrow beside it. Select the Create Template option.
- A pop-up window will appear where you will be asked to enter a name for your template by typing the name into the textbox provided.
- Select where to save the template to, either your account or account network. Choose from the dropdown menu available.
- You must also choose whether to publish the new template to your account by checking off the Publish Template checkbox.
- Click the green Create button at the bottom of the window to save your new template and be directed to the Template Management section (where you can choose to publish/unpublish, edit, share, or delete the template). Or, click the gray Cancel button to close the pop-up window without creating a template.



- You are also able to enter the Template Management section from the main SimplyCast 360 Dashboard by clicking the Templates option from the menu on the left side of the screen. Clicking on this tab will bring you to a page where you are able to view, edit, copy, publish, unpublish, and delete SimplyCast 360 templates created within your SimplyCast account.



[Note: This is not where you can view pre-created templates that have been pushed from SimplyCast. Pre-created templates known as Common Templates can be viewed by selecting the arrow button next to the green Create Campaign button.]

View a List of Templates

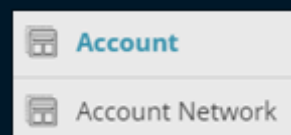
When you have created at least one template in your account (or have had at least one template shared by another member of your account network), you will be able to view these templates on this page.

For each template, you will be able to view:

- The name of the template
- A preview of the template
- Whether the template is published or unpublished
- The application the template was created for (SimplyCast 360 or Autoresponder)



In the menu on the left side of the screen you will see two template visibility options: Account and Account Network. The Account option refers to any templates that you have made yourself or other users in your specific SimplyCast account have published. The Account Network option lets you view the campaign templates visible for all users and accounts in the entire account network to use.



Navigate Multiple Pages of Templates

To view a campaign template that does not appear on the first page:

- Navigate to the bottom of your screen where you will find the page numbers indicating the total number of pages of campaign templates that have been created.
- If the template you are looking for is not on the first page, click the "Next" button to look through older campaigns on later pages.
- Or, if you know the page the template is on, you can click the appropriate page number or enter the page number into the textbox provided and select Go to be redirected to that page.

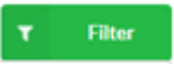
Displaying 1 - 10 of 11 | Showing 10 | Prev 1 2 Next | Enter page Go

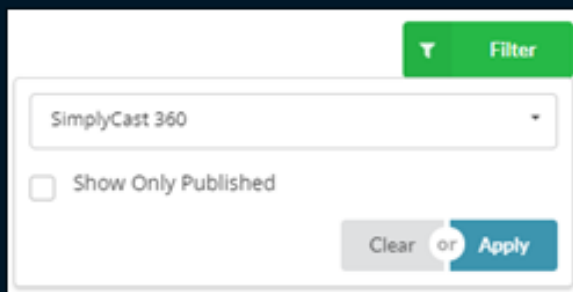
Filter Templates

To filter the available templates on the Templates page, there is a green Filter button located at the top right of the screen. The button will appear green as the templates are automatically filtered to the channel from which you entered the Account Templates page. Available channels include SimplyCast 360 and Autoresponder.

[Note: For example, since you entered the Templates page from the SimplyCast 360 channel, the templates will be automatically filtered to show only templates for the SimplyCast 360 channel.]

To use the filter tool:


1. Locate and click the green Filter button at the top right of the Account Templates page.
2.  A dropdown menu will appear with two filtering methods. The first method is another dropdown menu where you can select the channel to view templates for. Choose to view templates for either SimplyCast 360 campaigns, Autoresponder campaigns, or Email campaigns.
3. You can also choose to show only campaign templates that have been published. To do this, check off the Show Only Published checkbox.
4. When you have chosen how you wish to filter your campaign templates, click the blue Apply button to close the dropdown menu and apply the filter. Or, click Clear to close the dropdown without creating or changing the filter.



[Note: To remove an applied filter, click the green Filter button again and click Clear to reset the templates and show all of them again.]

Search for Templates

If you are looking for a particular template, you can search through the templates in the list.



To do this:

1. Select the search box that appears in the top right-hand corner of the page.
2. Type in the name of the template you would like the system to search for.
3. The list of templates will automatically filter.

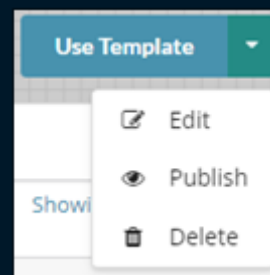
- To remove the search filter, remove the text you've entered by hitting the Backspace key until the search box is empty. You will return to the full list of templates.

Edit Templates

You can edit the name and description of a template as well as add labels.

To edit these settings:

- Locate the blue Use Template button located at the bottom of the preview for the appropriate template and click the downward-facing arrow to the right of this button to open a dropdown menu.
- Click the Edit option in this dropdown.
- A sidebar will appear from the right side of the screen, containing six fields:
 - Created By:** The name of the user that created the template. This cannot be edited.
 - Created On Account:** The name of the account the template was created on. This cannot be edited.
 - Created At:** The date and time the template was created. This cannot be edited.
 - Name:** The name of the template. To edit the name, type the new name into the textbox provided.
 - Description:** Add a description to the template by typing in the textbox provided.
 - Add Label:** Add a label to the template by typing it into the textbox provided and pressing Enter. You can add multiple labels to each template.
- Click the blue Save button at the bottom of the sidebar to close the sidebar and save your edits or click Cancel to close the sidebar without saving your edits.



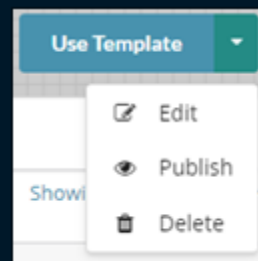
 A screenshot of a 'Template Settings' sidebar. The title 'Template Settings' is at the top. Below it are several fields: 'Created By' with the value 'Erin McCabe', 'Created On Account' with the value 'Simplycast', and 'Created At' with the value 'Jun 27th, 2018 2:17 PM'. These three fields are read-only. Below them is the 'Name' field, which is a text input containing 'Test' and has a small asterisk icon to its right. Underneath is the 'Description' field, a larger text area containing the placeholder text 'Description'. At the bottom is the 'Add Label (Press Enter to Add)' section, which includes a text input with the placeholder 'Enter a Label' and a magnifying glass icon to its right.


Publish or Unpublish Templates

Publishing a campaign template will make the template visible and available to everyone on your account.

To publish or unpublish a template from the Account Templates page:

1. Locate the blue Use Template button located at the bottom of the preview for the appropriate template.
2. Click the downward-facing arrow to the right of the Use Template button to open a dropdown menu.
3. Click the Publish/Unpublish button in this dropdown.
4. The Account Templates page will automatically refresh and either publish or unpublish the template. Published templates will have a green Published symbol in the top right corner of the template preview.

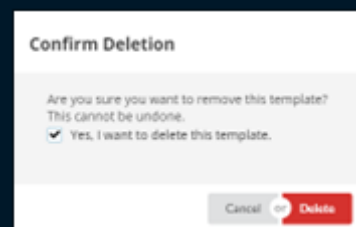
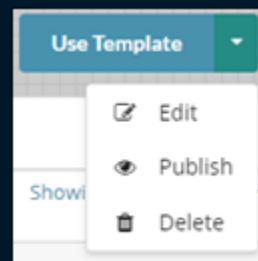


[**Note:** You can still make new edits to published templates.]

Delete Templates

To delete a template:

1. Locate the blue Use Template button located at the bottom of the preview for the appropriate template.
2. Click the downward-facing arrow to the right of the Use Template button to open a dropdown menu.
3. Click the Delete button in this dropdown.
4. A pop-up window will appear where you must confirm the deletion. To do this, click the checkbox and then click the red Delete button to delete the template and close the pop-up window, or click Cancel to close the pop-up without deleting the template.

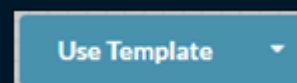


Create a SimplyCast 360 Campaign Using a Template

You are able to create new SimplyCast 360 campaigns using any of your saved templates. There are two possible ways you can do this:

1. In the Templates section of SimplyCast 360:

- 1.1. Click the blue Use Template button located at the bottom of the preview for the template you wish to use. The only templates available using this method are templates that have been created by your account or have been shared with your account network.



[Note: The Templates section is not where you can view and use pre-created templates that have been pushed from SimplyCast. Pre-created templates known as Common Templates can be viewed by selecting the arrow button next to the green Create Campaign button. Refer to the next creation method for more information.]

- 1.2. A pop-up window will appear where you must name your new SimplyCast 360 campaign. Enter the name into the textbox provided and click the green Create button to continue. Or, close the pop-up without using the template by clicking Close.

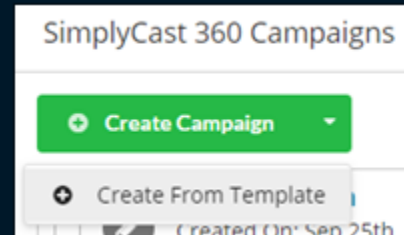
- 1.3. On the next page that appears, you will need to map the original template resources to resources you would like to use in your new campaign. In some instances, it will be columns, pipelines, or values. Templates that use these elements will have a placeholder item that you need to replace with one of your own.
- 1.4. To select the correct item for your campaign, click the dropdown in the Your "X" field (varies depending on the resource needing to be mapped) and choose the item you would like to use. Complete any additional steps required pertaining to the item needing to be mapped.
- 1.5. Repeat for any other item you need to map.
- 1.6. If you need to create a new field/resource, you can do so by clicking the green Add "X" button (varies depending on the resource needing to be mapped). This will cause a pop-up to appear asking you click the blue Open "X" button to open a new window in your browser where you can create or add the new resource as required without losing your progress in the Template setup.
- 1.7. Once you have created your new resource in the new browser window, go back to the window for Template setup. The same pop-up window will instruct you to refresh the page to access your new resource.

[Note: If you are creating a campaign and do not need to create a new resource, you will not have to complete this step.]

- 1.8. Click the green Create Campaign button to continue or click Cancel to stop the process.
- 1.9. After clicking Create Campaign, you will then be brought to the Automation Flow Editor, with the campaign already built to match the template you chose. From here you can edit or add to the template to create your new campaign, just like you would when creating a campaign from scratch.

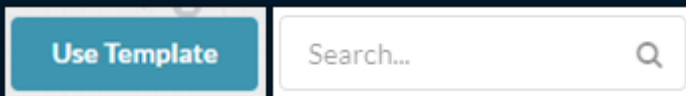
2. From the main SimplyCast 360 Dashboard:

- 2.1. Click the arrow button next to the green Create Campaign button to produce a dropdown menu with the Create From Template option.
- 2.2. Select this option to be directed to a page where you are able to view all templates associated with your SimplyCast account and account network, including all the Common templates that have been pushed from SimplyCast.



[Note: The primary difference between this page and the Template Management section is here you are unable to make modifications to any of the templates.]

- 2.3. Use the left-hand menu on this page to sort the templates by all, those visible to your account, those visible to your account network, and those common to all accounts (pushed by SimplyCast).



- 2.4. Search through the available templates using the search bar where you can search by template title, or by any tags added to the templates.
- 2.5. To use a template, click the blue Use Template button appearing under the template you wish to use.
- 2.6. From here, the campaign creation is the same as it is in the section above (naming, mapping resources, etc.).