SimplyCast

Powering Automation, Igniting Growth for Smarter Connections

SimplyCast 360

Canvas Settings Bar and Widgets 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.

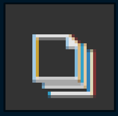
Canvas Settings Bar and Widgets

Above the canvas is the Canvas Settings Bar, containing eight widgets. Widgets are tools other than elements that you can use to help build your campaign and make it more user-friendly.

These widgets are:

- Create a New Note on the Canvas
- Create a New Section on the Canvas
- Show or Hide the Canvas Grid
- Snap Elements to the Grid
- Show Interactions on the Canvas
- Refresh the Interaction Information
- Undo Last Action
- Redo Next Action

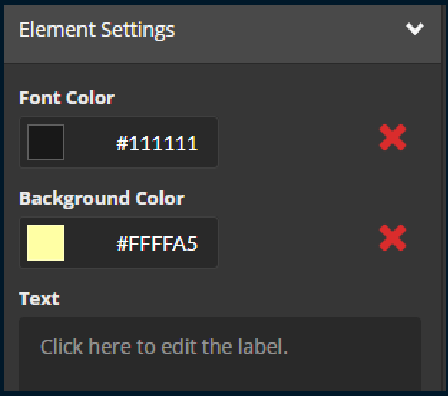
Create a New Note on the Canvas



It helps to add notes to the various stages of a campaign to maintain organization, especially for larger and more intricate campaigns.

To add a note to your campaign:

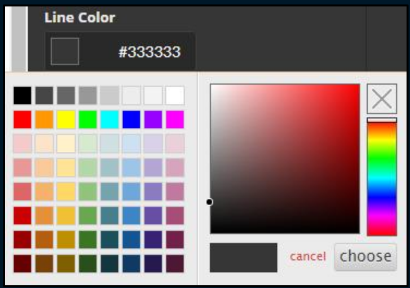
1. Locate the “Create a New Note on the Canvas” icon in the toolbar above the canvas. It is the first icon to the left, next to the search bar.



2. Click the “Create a New Note on the Canvas” icon or drag and drop it into the canvas to create a new note.
3. A new note will appear on the canvas as a yellow textbox once you click or drag and drop the icon. You can move the note around on the canvas by dragging and dropping it with your mouse. When you select the note with your mouse, three additional fields will appear in the Element Settings section in the Settings Panel.
4. The first field is the Font Color field, where you can choose the color of the text in that note.

To choose a color:

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.
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.
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.



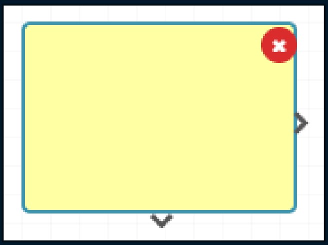
The second field is the Background Color field, where you can choose the note's background color.

To choose a color:

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.
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.
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.

The third field is the Text field, where you can type the note's content into the textbox provided and adjust its size.

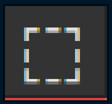
To do this:



1. Hover your mouse over the note and locate the arrows on the bottom and right sides of the note.
2. To adjust the note’s height, drag the downward-facing arrow up or down.
3. To adjust the note’s width, drag the right-facing arrow to the right or left.

To delete the note, hover your mouse over the note and click the red “x” icon in the top right corner of the note.

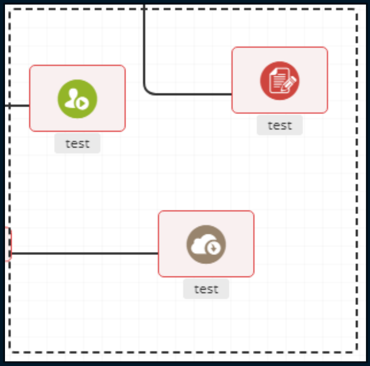
Create a New Section on the Canvas



It helps to have a way to organize larger and more complex campaigns. The sectioning tool allows you to group specific elements into sections for easy management.

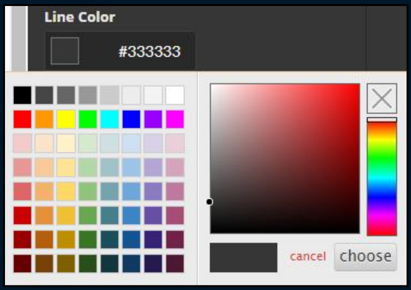
To create sections in your campaign:

1. Locate the "Create a New Section on the Canvas" icon in the toolbar above the canvas. The Sections icon is the second icon to the left, next to the "Create a New Note on the Canvas" icon.



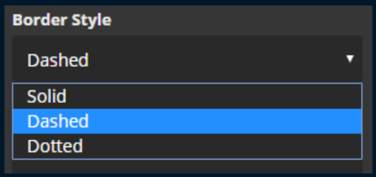
2. Either click the Sections icon or drag and drop it onto the canvas to create a new section, indicated in the canvas by a box made of dashed lines. You can move the section around on the canvas by dragging and dropping it with your mouse.
3. When you select the section by clicking the border of the box, three new fields will appear in the Element Settings section of the Settings Panel.
4. The first field is the Border Color field, where you can change the color of the section's border.

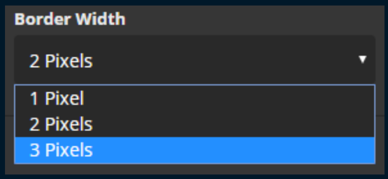
To choose a color:



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.
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.
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.

The second field is the Border Style field. This is where you can choose whether the section's border will consist of a solid line, dashed lines, or dotted lines. Choose your preferred border style from the dropdown menu provided.

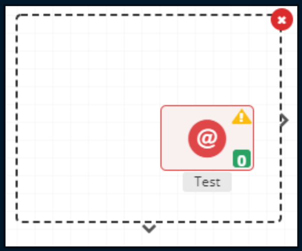




The third field is the Border Width field. This is where you can choose whether the section's border will be 1 pixel, 2 pixels, or 3 pixels in length. Choose your preferred border width from the dropdown menu provided.

You can also adjust the size of the section.

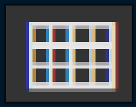
To do this:



1. Click on the section's border and locate the arrows on the bottom and right sides of the section.
2. To adjust the section's height, drag the downward-facing arrow up or down.
3. To adjust the section's width, drag the right-facing arrow to the right or left.

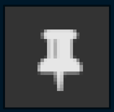
To delete the section, hover your mouse over the note and click the red "x" icon in the top right corner of the section.

Show or Hide the Canvas Grid



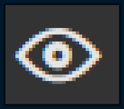
By default, the canvas is gridded. To hide the canvas grid, locate the Canvas Grid icon in the Widgets bar above the canvas. Click the Canvas Grid icon once to hide it. If the canvas grid is hidden, click the Canvas Grid icon again to make it reappear.

Snap Elements to the Grid



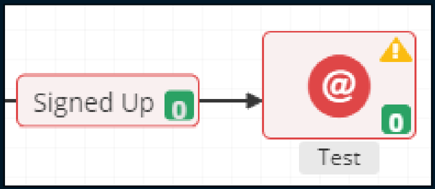
When moving elements around the canvas, you can choose whether they snap in line with the gridded lines or are placed freely on the canvas. When the icon is dark, elements will snap to the grid. When it is lighter, elements will not snap to the grid. To change these settings, click the pushpin icon in the Widgets bar above the canvas.

Show Interactions on the Canvas



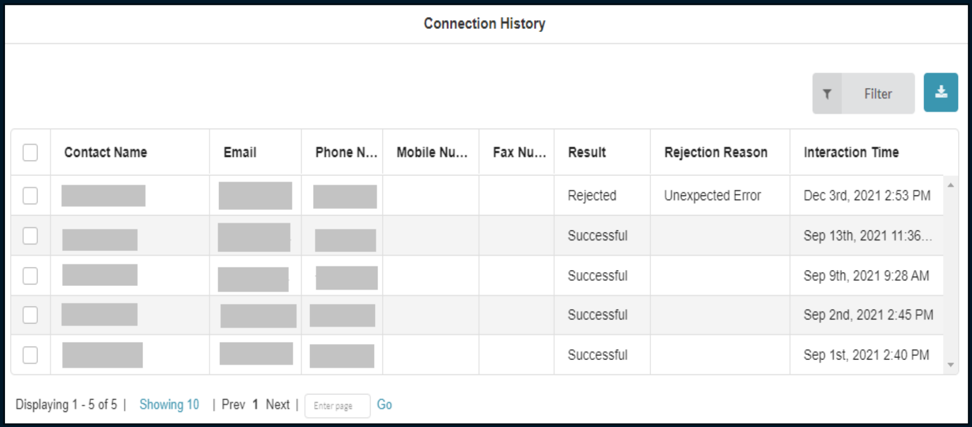
When a campaign is active, you may choose to have the number of contact interactions each element has had appear on the canvas. To do this, click the eye icon in the Widgets bar above the canvas.

1. Once the setting is activated, you will see a number at the bottom right of most elements and connections in the campaign. This number indicates the number of contacts who have reached each point in the campaign.



2. If you hover your mouse over the number, you will see a written description of the connection or element's interactions.

3. Clicking the interaction number on an element from the Campaigns tab, such as an Email Campaign element, you will be redirected to the Reports page for that campaign, where you can see a full campaign report. You can also click the interaction number on a Signup Form, Survey, or Update Form element to be referred to the respective form report. Refer to the *Reports* section in this guide for more information on reports.
4. If you click the number on an active connection, a Connection History sidebar will appear where you can see a complete list of contacts and their interaction with that connection. By default, the Connection History sidebar contains a table with the following pieces of information:



Connection History

Filter

	Contact Name	Email	Phone N...	Mobile Nu...	Fax Nu...	Result	Rejection Reason	Interaction Time
	[redacted]	[redacted]	[redacted]			Rejected	Unexpected Error	Dec 3rd, 2021 2:53 PM
	[redacted]	[redacted]	[redacted]			Successful		Sep 13th, 2021 11:36...
	[redacted]	[redacted]	[redacted]			Successful		Sep 9th, 2021 9:28 AM
	[redacted]	[redacted]	[redacted]			Successful		Sep 2nd, 2021 2:45 PM
	[redacted]	[redacted]	[redacted]			Successful		Sep 1st, 2021 2:40 PM

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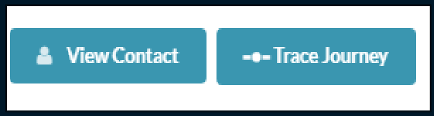
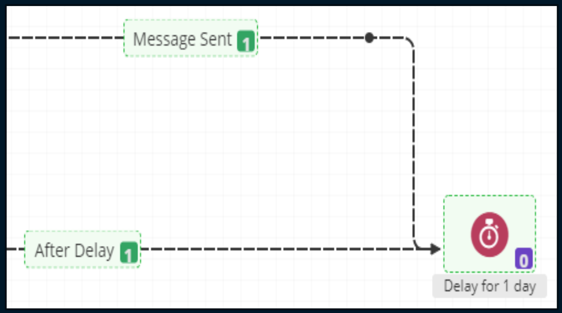
4.1. **Contact Name:** The name of the contact.
4.2. **Email:** The contact's email address.
4.3. **Phone Number:** The contact's phone number.
4.4. **Mobile Number:** The contact's mobile phone number.
4.5. **Fax Number:** The contact's fax number.

   4.6. **Result:** Whether the contact passed through the connection successfully or was rejected.
   4.7. **Rejection Reason:** The reason why a contact did not go through the connection (duplicate, error, etc.)
   4.8. **Interaction Time:** The date and time the contact interacted with that connection.

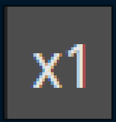
5. When you select a contact by clicking the checkbox beside their name, two blue buttons will appear at the top of the Connection History sidebar: View Contact and Trace Journey.

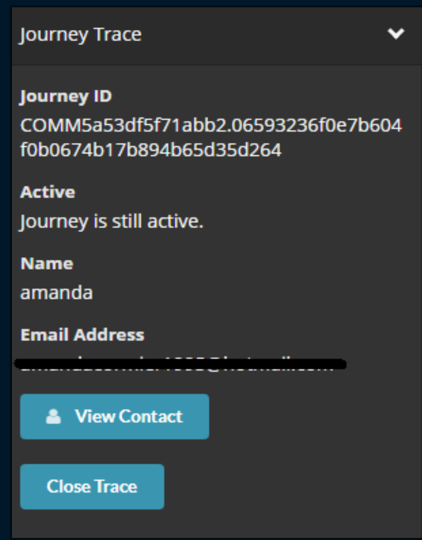


   5.1. **View Contact:** Click this button to open the contact's full CRM profile. Refer to the *SimplyCast CRM User Guide* for more information about contact profiles.
   5.2. **Trace Journey:** A journey is the path an individual contact takes through the campaign, and the Trace Journey feature gives you a visual representation of a selected contact's journey up to the current moment. When looking at the elements and connections in the campaign, points the contact has already passed through will have a dashed-line border, while points they have yet to reach will have a solid border as usual. The lines connecting elements will also be a dashed black line instead of the usual solid black line.



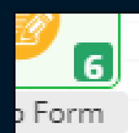
6. Furthermore, an animated dot will move along the line and through the elements to represent the journey. You can change the speed of the dot's movement from the navigation bar. To the right of the Refresh Interaction Information widget, you will see an additional widget where you can adjust the journey trace's speed. Your speed options are x1 (normal speed), x2, and x5.



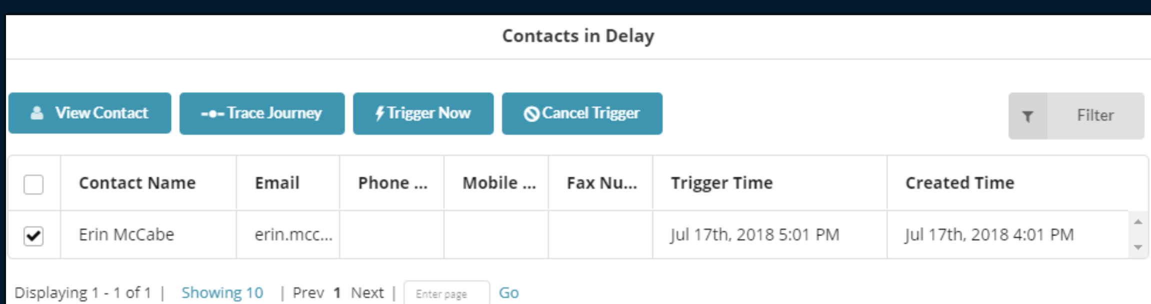


7. When the Journey Trace is activated, there will be a sidebar on the right side of the screen, with the following actions and pieces of information:
   7.1. **Journey ID:** The unique ID given to each journey
   7.2. **Active:** Indicates whether the journey is still active.
   7.3. **Name:** The contact's name
   7.4. **Email Address:** The contact's email address, if applicable to the journey
   7.5. **Phone Number:** The contact's phone number, if applicable to the journey
   7.6. **Mobile Number:** The contact's mobile number, if applicable to the journey
   7.7. **Fax Number:** The contact's fax number, if applicable to the journey
   7.8. **View Contact:** Click this button to view the contact's full CRM profile. For more information about contact profiles, refer to the SimplyCast CRM User Guide.
   7.9. **Close Trace:** Click this button to close the trace and close the sidebar.

Trigger Now Functionality



When you click the interaction number on one of the Delay element options from the Choices and Delays section of the Creation Panel (Delay, Delay Until Date on Contact, or Delay Until), a sidebar will open where you will see the table of all contacts currently waiting to progress to the next stage of the campaign.


Contacts in Delay

View Contact | Trace Journey | Trigger Now | Cancel Trigger | Filter

	Contact Name	Email	Phone ...	Mobile ...	Fax Nu...	Trigger Time	Created Time
✔	Erin McCabe	erin.mcc...				Jul 17th, 2018 5:01 PM	Jul 17th, 2018 4:01 PM

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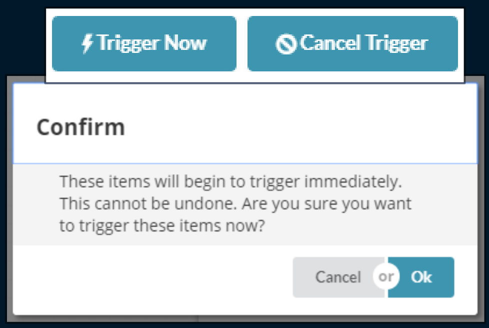
The table will contain the following information:

1. **Contact Name:** The name (if available) of the contact in the delay
2. **Email:** The email address (if available) of the contact in the delay

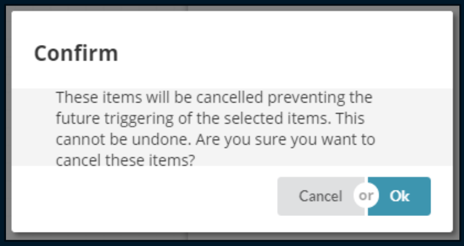
3. **Phone Number:** The phone number (if available) of the contact in the delay
4. **Mobile Number:** The mobile number (if available) of the contact in the delay
5. **Fax Number:** The fax number (if available) of the contact in the delay
6. **Trigger Time:** The date and time the contact will be triggered to progress to the next stage in the 360 campaign
7. **Created Time:** The date and time the contact arrived at the delay element

Clicking the checkbox next to a contact's name will produce four new blue buttons at the top of the contacts table. Two of these buttons (View Contact and Trace Journey) also appear in the Connection History sidebars that are produced when the interaction number is clicked on a connection. Refer to earlier in this section for explanations of these buttons.

The other two buttons appearing when checking off one or more contacts in the table are the Trigger Now and Cancel Trigger buttons.

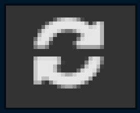


1. The Trigger Now button allows you to override the delay and immediately trigger the contact(s) to continue to the next step in the campaign.
   1.1. Clicking this button will cause a pop-up window to appear, warning that it cannot be undone once you override the delay for the contact(s).
   1.2. Click the blue OK button to continue or click Cancel to close the pop-up without overriding the delay.
2. The Cancel Trigger button lets you remove the trigger for the selected contact(s). This means that the contact(s) will not be triggered at the time designated by the element's configuration. The contact(s) will be removed from the table.



   2.1. Clicking the Cancel Trigger button will cause a pop-up window to appear indicating that this action cannot be undone.
   2.2. Click the blue OK button to continue or Cancel to close the pop-up without cancelling the trigger.

Refresh the Interaction Information



The final widget in the Widgets bar above the canvas refreshes the interaction information displayed on the canvas. This widget is only available if the Show Interactions on the Canvas widget is activated.

1. Click the refresh icon at any time to refresh the canvas's interaction information.

Undo Last Action

You can undo previous actions at any time while building a campaign by clicking the Undo button at the top right corner of the canvas opposite the other widgets.

1. However, you cannot undo actions performed before saving once you save the campaign.

[**Note:** The CTRL+Z keyboard shortcut will also undo the previous action.]

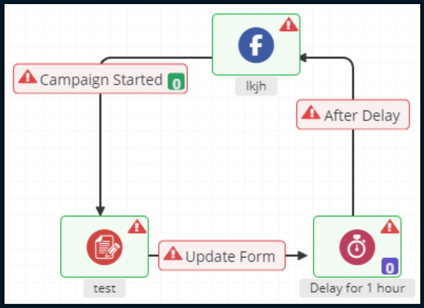
Redo Next Action

If you choose to undo an action, you can redo it by clicking the Redo button beside the Undo button. Remember that once you save the campaign, you cannot redo actions that were undone before saving.

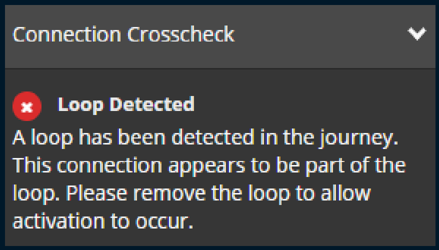
[**Note:** The CTRL+Y keyboard shortcut will also serve to redo the last action.]

Loop Detection

The SimplyCast 360 application is very intuitive. It detects whether there are any loops in a campaign that would prevent a contact from progressing through the flow and causing them to remain stuck in a repetitive series of actions.



When the system has detected a potential loop in a campaign, it will cause a series of red exclamation point icons to appear in the corners of all campaign elements and connections determined to be a part of the loop. Clicking on any component or connection with one of these icons will cause the Element/Connection Crosscheck section to appear in the Settings Panel, explaining that a loop was found in the campaign and needs to be corrected before the campaign can be activated.



When you have finished configuring your 360 campaign, click the green Save button at the bottom right corner of the screen to save your progress. Then, click the Next button to proceed to the Crosscheck page.