SimplyCast

Powering Automation, Igniting Growth for Smarter Connections

SimplyCast 360

Crosschecks User Guide

Updated on: July 1st, 2025

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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.

Crosscheck

The Crosscheck page helps you ensure that all items in the SimplyCast 360 campaign are activated before the whole campaign is activated.

**The Crosscheck page is divided into up to three sections:**

Connections

The Connections section informs you of connection issues between elements in your campaign. If there are no issues, you will see a green checkmark icon and a message that all connections are ready to be activated.
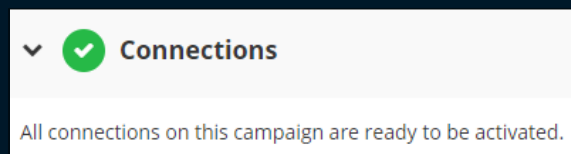
If issues exist that could potentially cause problems in the campaign but that do not need to be resolved to activate the campaign, a yellow exclamation mark icon and a description of the issue(s) found will appear. The system will offer instructions on resolving the problem and a blue Edit button to redirect you to the page where you can make the necessary changes to resolve the issue.
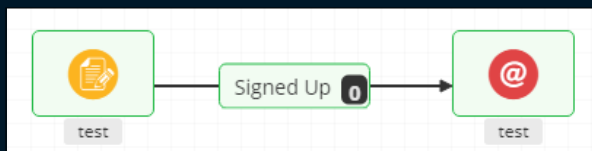
If issues must be resolved to activate the campaign, a red "X" icon will appear, along with a description of the issue(s) found. The system will offer instructions on how to resolve the issue, and the blue Edit button will redirect you to the appropriate page in the editor to make these changes.
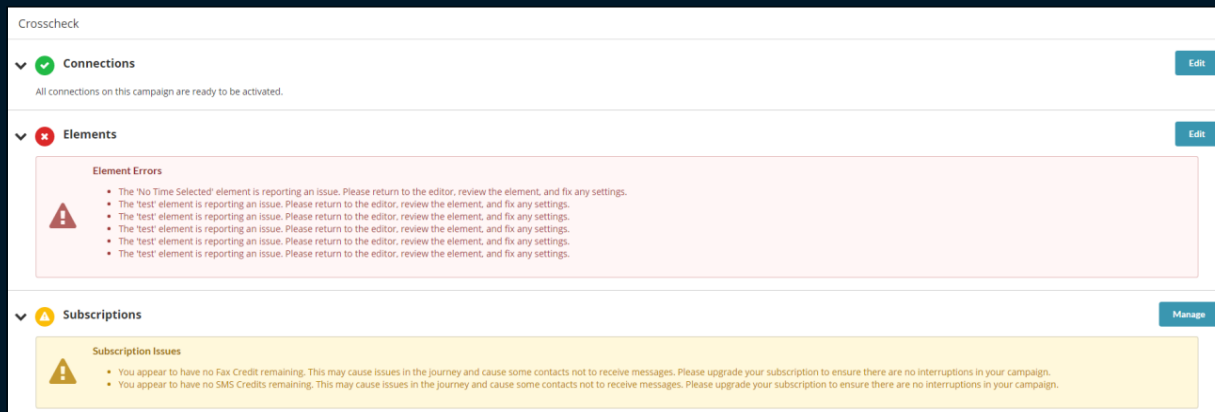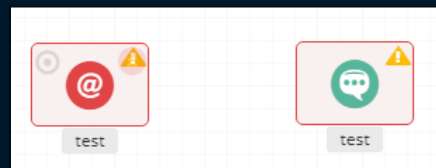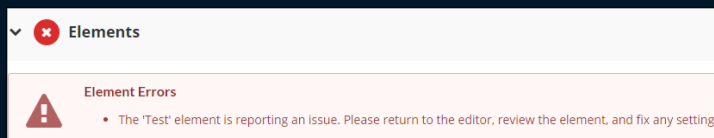

Elements

The Elements section informs you of any issues with the elements in your campaign. If there are no issues, you will see a green checkmark icon and a message that all elements are ready to be activated.

If issues exist that could potentially cause problems in the campaign but do not need to be resolved to activate the campaign, you will see a yellow exclamation mark icon and a description of the issue(s) found. The system will offer instructions on resolving the problem, and a blue Edit button will redirect you to the page where you can make the necessary changes to resolve the issue.

If issues must be resolved to activate the campaign, you will see a red "X" icon and a description of the issue(s) found. The system will offer instructions on resolving the problem and a blue Edit button that will redirect

you back to the canvas to make the appropriate changes. When you return to the canvas, any elements with errors will be red, while ones without errors will be green.
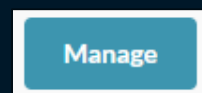
Subscriptions

The Subscriptions section informs you of any issues with your account

subscription, such as a lack of credits. If there are no issues, you will see a green checkmark icon and a message that all connections are ready to be activated.

If issues exist that could potentially cause problems in the campaign but do not need to be resolved to activate the campaign, you will see a yellow exclamation mark icon and a description of the issue(s) found. The system will offer instructions on resolving the problem and a blue Manage button redirecting you to your Account Subscription page, where you can make the appropriate changes to your subscription.

If issues must be resolved to activate the campaign, you will see a red "X" icon and a description of the problem (s) found. The system will offer instructions on resolving the issue and a blue Manage button that will redirect you to your Account Subscription page, where you must make the appropriate changes to your subscription before you can activate the campaign.
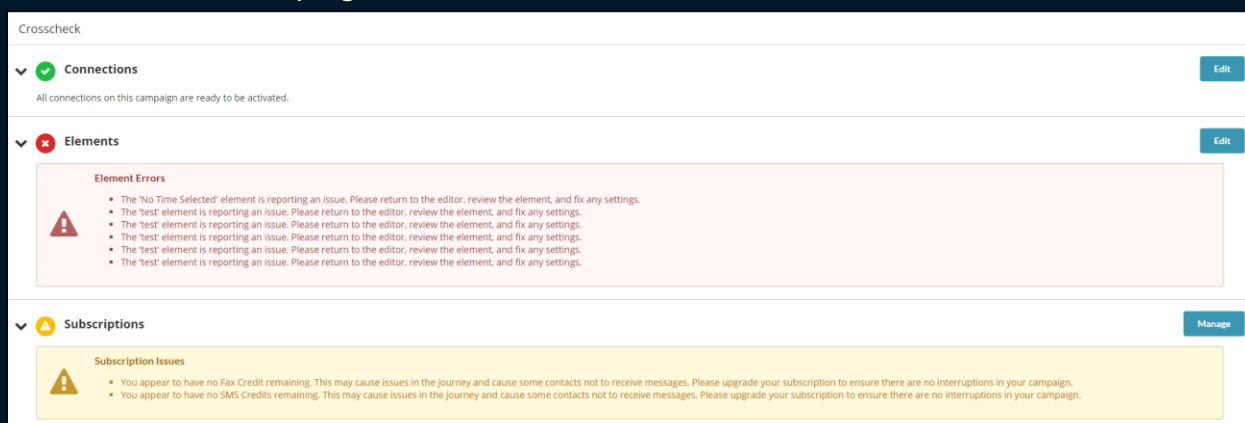
Once you have finished reviewing the crosscheck page and all campaign components
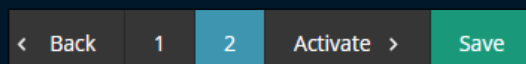
are ready to be activated, click the black Activate button at the bottom right corner of the screen to activate your campaign. You will be redirected to the SimplyCast 360 Dashboard, where you will see that the new SimplyCast 360 campaign has been activated.