



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

SimplyCast 360 Dashboard User Guide



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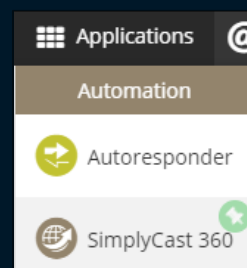
Overview

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.

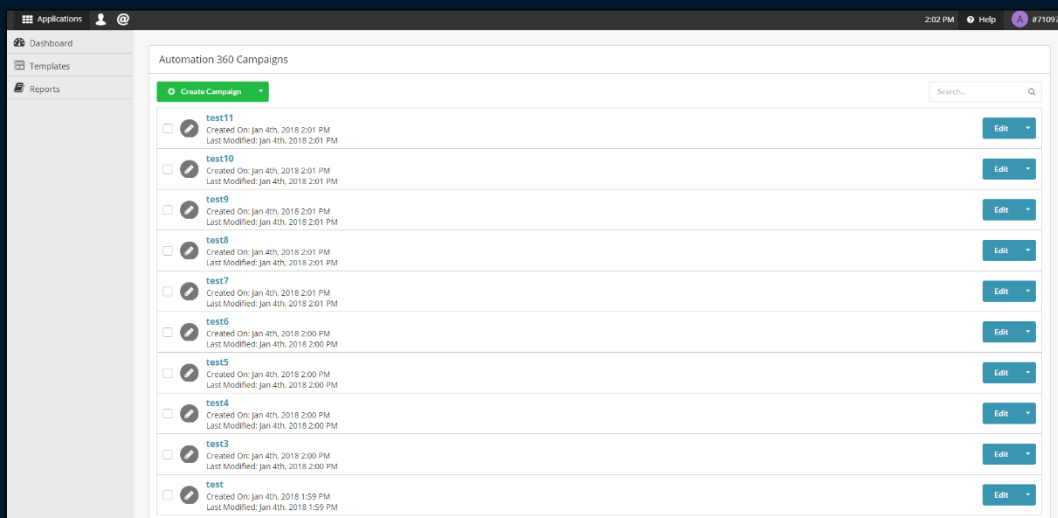
With SimplyCast 360, you can use a variety of drag-and-drop elements to create extensive campaigns, as well as rules and decisions to determine which messages are sent to whom and when exactly they are sent. Once you have a campaign structure with all the required elements and decisions, you can create and customize content for each message.

SimplyCast 360 Dashboard

To set up and deploy a SimplyCast 360 campaign in the SimplyCast platform, first go to the SimplyCast 360 Dashboard. SimplyCast 360 can be found in the top bar in the Applications dropdown menu under Automation.



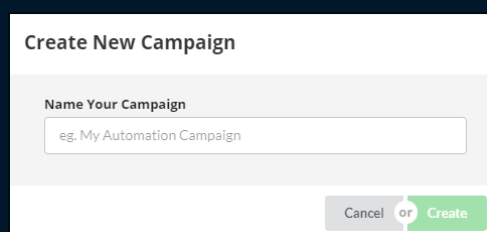
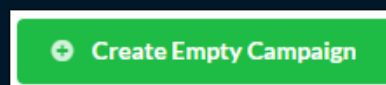
From here, you will be brought to the main SimplyCast 360 Dashboard where you can create a new campaign; copy an existing campaign from a template; see a list of all the SimplyCast 360 campaigns you have already made; and view the ones that are currently active, as well as any that are pending activation.



From the SimplyCast 360 Dashboard, you can:

Creating a New SimplyCast 360 Campaign

If you wish to create a new SimplyCast 360 campaign, there is a green Create Empty Campaign button at the top of the SimplyCast 360 Dashboard. Clicking this button will open a pop-up window where you can name the campaign. Enter a name into the field provided and click the green Create button to move on to the main SimplyCast 360 campaign creation and scheduling process. Or click Cancel to close the pop-up without creating a new SimplyCast 360 project.







You can create a new SimplyCast 360 campaign using a pre-made template. Click the green Create Campaign from Template button to be directed to the Account Templates page. Refer to the *SimplyCast 360 Templates User Guide* for more information about campaign templates.



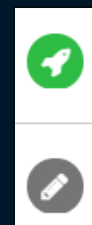
View the List of SimplyCast 360 Campaigns

Below the Create Campaign button, you will see a list of all the SimplyCast 360 campaigns that have been created, with the most recently modified appearing at the top. If there are no projects listed, this means none have been created yet.

<input type="checkbox"/>		test10 Created On: Jan 4th, 2018 2:01 PM Last Modified: Jan 4th, 2018 2:01 PM	Edit
<input type="checkbox"/>		test9 Created On: Jan 4th, 2018 2:01 PM Last Modified: Jan 4th, 2018 2:01 PM	Edit
<input type="checkbox"/>		test8 Created On: Jan 4th, 2018 2:01 PM Last Modified: Jan 4th, 2018 2:01 PM	Edit
<input type="checkbox"/>		test7 Created On: Jan 4th, 2018 2:01 PM Last Modified: Jan 4th, 2018 2:01 PM	Edit

You will be able to see four pieces of information:

1. **Name:** The name you gave your SimplyCast 360 campaign
2. **Status:** Either a green or gray icon indicating whether the SimplyCast 360 campaign is active or inactive (green meaning active, gray meaning inactive)
3. **Created On:** The date and time the campaign was created
4. **Last Modified:** The date and time the campaign was last modified



Navigate Multiple Pages of SimplyCast 360 Campaigns

To view a SimplyCast 360 campaign that does not appear on the first page:

1. Navigate to the bottom of your screen where the page numbers indicate the total number of pages of SimplyCast 360 campaigns you have created.
2. If the campaign you are looking for is not on the first page, click the “Next” button to look through older campaigns on later pages.
 - 2.1. If you know the page the campaign is on, you can click the appropriate page number or enter the page number into the textbox provided to be redirected to that page.

Displaying 1 - 10 of 11 | Showing 10 | Prev 1 2 Next |

Filter SimplyCast 360 Campaigns

You can filter 360 campaigns by their current status, the date and time they were created, or the date and time they were modified.

To filter your campaigns:

1. Find the gray Filter button at the top right-hand side of your screen.
2. Click the Filter button, and a sidebar will appear with three field options: a dropdown menu to filter your campaigns by status, and two field sets with boxes that say Click to Set Date to filter the campaigns by the date they were created or modified.
3. To filter by campaign status, click the dropdown menu in the sidebar's Status field and select whether to filter by active, inactive, or all campaigns.
4. Below the Status dropdown is the Created Date and Time field set, which allows you to filter based on the campaigns' creation. The second field set is the Modified Date and Time, which allows you to filter campaigns based on when they were last modified.
5. Click any Click to Set Date box in either of these field sets, and another dropdown menu will appear with two fields labeled Date and Time. Here, you can manually insert the date and time to filter campaigns.
6. Below these fields, there is a calendar you can also use to select the date from which you would like to filter campaigns.
7. Click the blue Apply Filter button to implement the filter. Alternatively, click Close to close the dropdown menu if you do not wish to filter your campaigns.

[**Note:** When a filter is applied, the formerly gray Filter button will appear green. To remove a filter, click the green button and then select Clear Filter.]

Search SimplyCast 360 Campaigns

If you are looking for a particular SimplyCast 360 campaign you have already created, you can search through your campaigns in the list on the SimplyCast 360 Dashboard.

To do this:

1. Select the search box in the top right-hand corner of the page.
2. Type in the name you want the system to search for.
3. The list of SimplyCast 360 campaigns will automatically filter.
4. Clear the text in the search box to remove a search filter. You will then return to the complete list of SimplyCast 360 campaigns.



Edit a SimplyCast 360 Campaign



Once SimplyCast 360 campaigns have been created, they will appear in a list below the green Create Campaign button on the main SimplyCast 360 Dashboard.

To edit a SimplyCast 360 campaign:

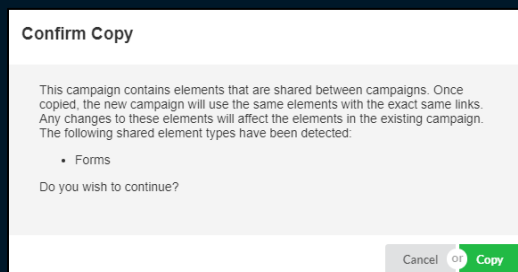
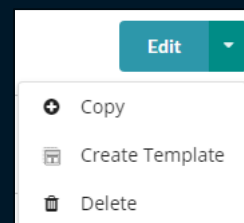
1. Click the blue Edit button on the screen's far-right side across from the corresponding campaign name.
2. Make your edits in the Automation Flow Editor and click Save at the bottom of the page to save your edits. Or, click Back to Dashboard to return to the main SimplyCast 360 Dashboard without making any changes. Refer to the *Automation Flow Editor Campaigns User Guide* to learn about editing SimplyCast 360 campaigns.

Copy Structure of a SimplyCast 360 Campaign

You can copy the structure of an existing SimplyCast 360 campaign to create a new campaign using the same structure.

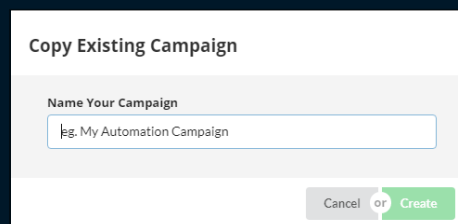
To copy a SimplyCast 360 campaign:

1. Locate the blue Edit button on the far-right side of the screen across from the corresponding campaign name and click the dropdown arrow beside it. Select the Copy option.
2. A pop-up window will appear to confirm the copying of the campaign. A warning may appear indicating that multiple campaigns share some campaign elements.



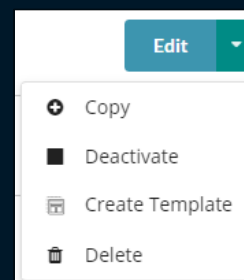
[Note: Copying a SimplyCast 360 campaign will not only copy the workflow structure, but also all the content, decision settings, delays, etc.]

3. Once you click Copy, a new pop-up appears where you can name your latest campaign. Enter the name and click the green Create button. Your new campaign will now appear in the list of campaigns on the SimplyCast 360 Dashboard.
4. Or, click Cancel to close the pop-up window without copying a campaign.



Create a Template of a SimplyCast 360 Campaign

A template is a version of the SimplyCast 360 flow saved to your Templates section for reuse by you or anyone else on your account or account network (depending on how it is shared), with all the elements and connections intact. This is useful for flows you may need to recreate frequently, like product launch campaigns or “Contact Us” campaigns. Templates are found in the Account Templates section of the platform. Refer to the *Templates* section of this guide for more information on creating and managing your SimplyCast 360 templates.

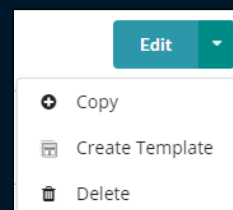


Delete a SimplyCast 360 Campaign

There are two ways to delete a SimplyCast 360 campaign:

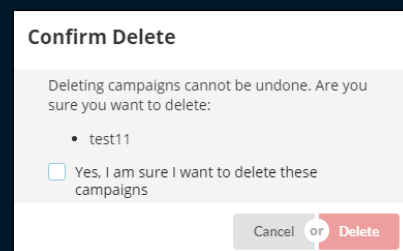


1. Select one or multiple campaigns to delete by clicking the checkbox to the left of the campaign name. This will cause a red Delete Campaign(s) button to appear at the top of the screen next to the green Create Campaign button.
2. Locate the blue Edit button on the far-right side of the screen across from the corresponding campaign name and click the dropdown arrow beside it. Select the Delete option. Either of these actions will cause a Confirm Delete pop-up to appear. This pop-up will display the name of the campaign you wish to delete and explain that deleting campaigns cannot be undone.

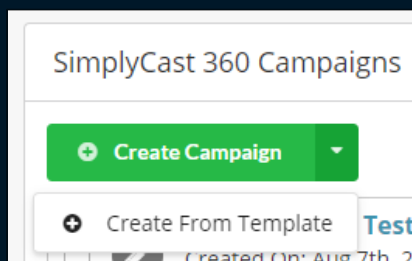


To confirm the deletion of the campaign:

1. Click the checkbox at the bottom of the pop-up to confirm that you want to delete the campaign.
2. Click the red Delete button to delete the campaign.



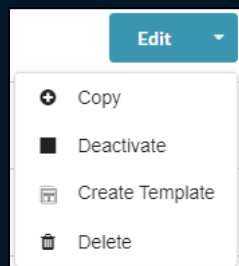
Create a SimplyCast 360 Campaign from a Template



To create a new SimplyCast 360 campaign using a pre-created template, click the arrow button on the green Create campaign button in the SimplyCast 360 Dashboard. You will be directed to the Templates page, where you can choose from templates available to your account and account network (if any). Refer to the

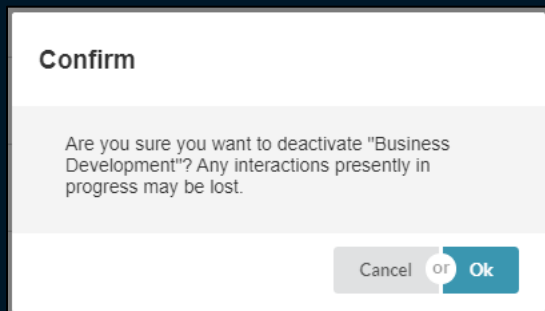
SimplyCast 360 Templates User Guide to learn more about templates.

Deactivate a SimplyCast 360 Campaign



To deactivate an active SimplyCast 360 campaign so that no more messages will be sent and contacts will no longer move through the automated campaign, click the arrow button next to the blue Edit button across from an active campaign you wish to deactivate. Select the Deactivate option that appears in the dropdown menu

that appears. A pop-up window will appear asking you to confirm the deactivation of the campaign. Click the blue OK button to confirm the deactivation or click Cancel to close the pop-up window without deactivating the campaign.



View SimplyCast 360 Reports

You can view reports for any SimplyCast 360 campaign that has already been activated. To enter the main SimplyCast Reporting interface, navigate to the menu on the left-hand side of the screen in the SimplyCast 360 Dashboard. Click the Reports tab to be taken to the Reporting Dashboard, where all the reports for this channel will be displayed. Please refer to the Reports User Guide for more information about SimplyCast 360 reports.