SimplyCast

Powering Automation, Igniting Growth for Smarter Connections

SimplyCast 360

Automation Flow Editor Settings Panel 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.
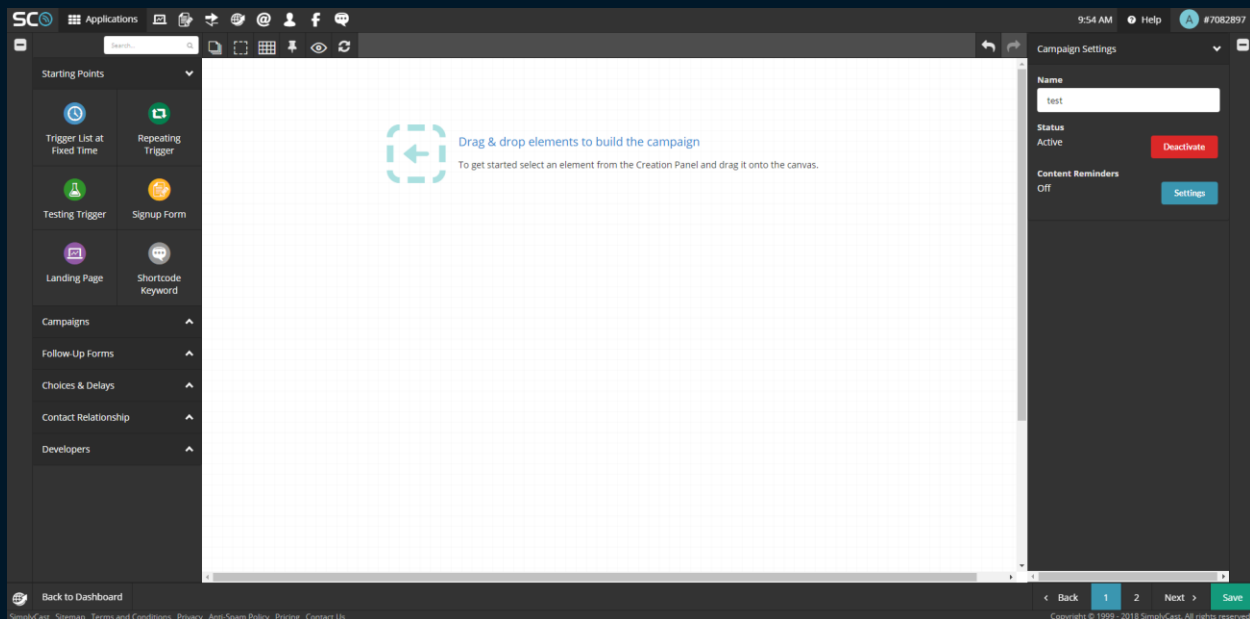
    3.1. Or click Cancel to close the pop-up without creating a campaign.

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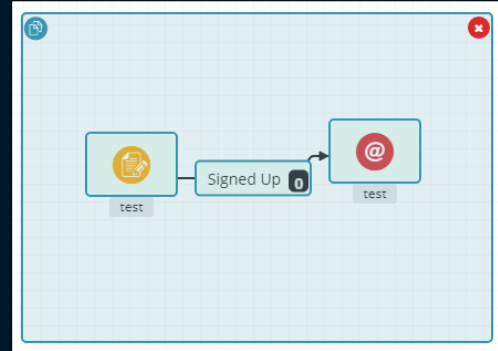
When you hover your mouse over a highlighted section of the canvas, you will see two new icons appear in the top corners of the blue box. On the left is a Copy All Selected icon, which allows you to create a second copy of the highlighted section in the canvas.

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.
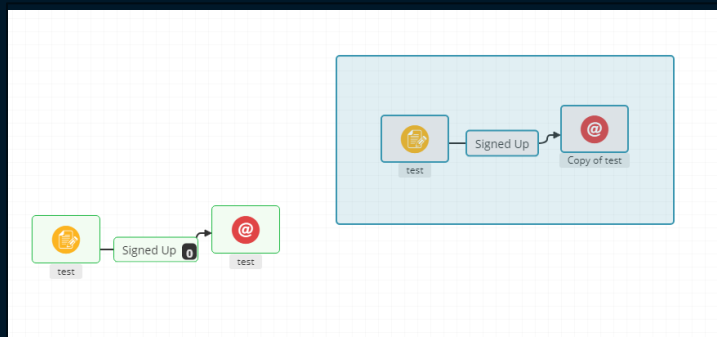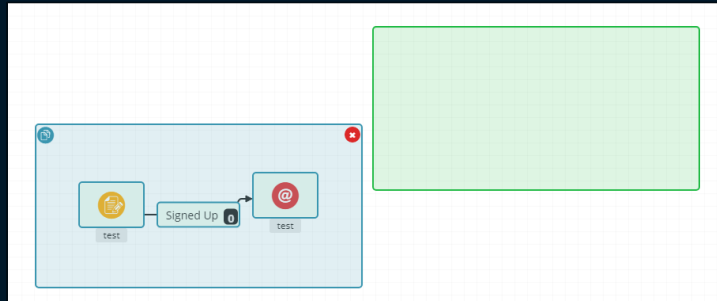
4. The red "X" icon on the top right corner is used to delete the highlighted section of your campaign. When you hover your mouse over the highlighted section, this red "x" icon will appear. Click the icon, and a pop-up will appear asking you to confirm your deletion. Click the red Delete button to confirm the deletion and close the pop-up or click Cancel to close the pop-up without deleting the selection.
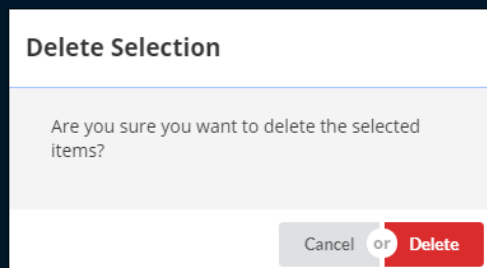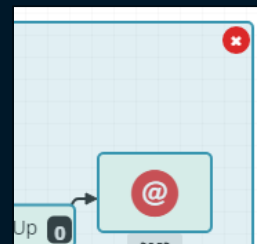
The last thing you can do with highlighted sections is move them around the canvas; this simultaneously moves all the highlighted elements, widgets, and connections as a block. To do this, click and hold the mouse down anywhere inside the highlighted section, and drag and drop the section around the canvas as desired.

Settings Panel

The Settings Panel is located on the right side of the screen in the Automation Flow Editor. This is where you can view and edit all the settings for the SimplyCast 360 campaign itself as well as the settings for a specific element. The Settings Panel contains up to five types of settings: Campaign Settings, Element Crosscheck, Element Content, Element Settings, and Connection Settings.

Campaign Settings

Campaign Settings are settings that apply to the campaign as a whole. They can be accessed in the Settings Panel when there are no elements or connections selected on the canvas.

The campaign settings you can adjust are the following:

1. **Name:** Edit the name of the campaign. Type the desired name into the textbox provided.
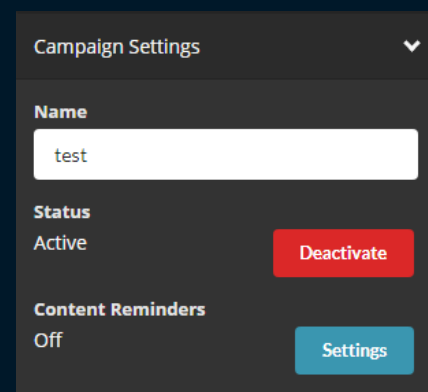
2. **Status:** Activate or deactivate the campaign by clicking either the blue or red button respectively. Activating a campaign means contacts will be able to pass through, respecting any delays or conditions that were set.

    [**Note:** Keep in mind the campaign will not become active or inactive until you save the project after clicking the Activate/Deactivate button.]

3. **Content Reminders:** Content reminders are emails sent to one of your confirmed email addresses to remind you to update your content on a regular basis. It is important to ensure content remains up to date, especially for long-term campaigns.

4. **To set up a reminder:**
    4.1. Click the blue Settings button in the Content Reminders field.
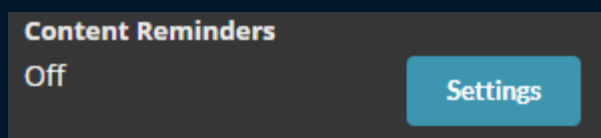
    4.2. A sidebar will appear with a checkbox to click to enable content reminders.

    4.3. When the Use Content Reminders checkbox is clicked, two more fields will appear in the sidebar: Email Addresses, and Reminder Delay. Disabling content reminders will cause the other two fields—Email Addresses and Reminder Delay—to disappear.
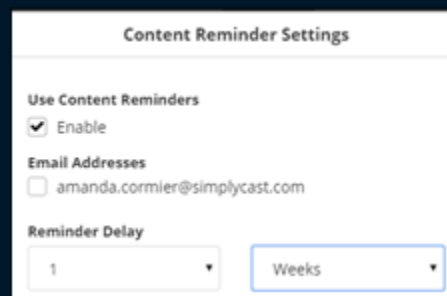
    4.4. The Email Addresses field is where you must choose at least one email address to send content reminders to. You will be able to choose from any emails associated with your account. Click the checkbox to the left of any email address to select it.

    4.5. The Reminder Delay field is where you choose how often you want content reminders to be sent. This field contains two dropdowns. In the first dropdown, choose a number from 1-7 and in the second dropdown choose a unit of time (Days, Weeks, or Months). The number in the first dropdown determines the number of the selected time unit the system will wait between content reminder sends. So, for example, if you select "5" in the first dropdown and "Weeks" in the second dropdown, the system will send a content reminder every five weeks to the selected email address.

4.6. Click the blue Confirm button to save these settings and close the pop-up, or click the gray Cancel button to close the pop-up without saving your content reminder settings.

On the top right corner of Campaign Settings is a black and white "-" button. Click this button to hide the Settings Panel. When the Settings Panel is hidden, the "-" button will become a "+" button. Click this button to re-expand the Settings Panel.
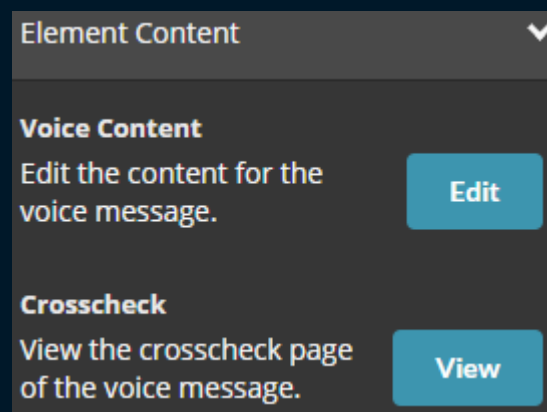
Element Crosscheck

The Element Crosscheck section will only appear in the Settings Panel when there is an issue with the selected element that may need to be resolved before the campaign can be activated. The Element Crosscheck section will describe the issue and offer ways to solve the issue.
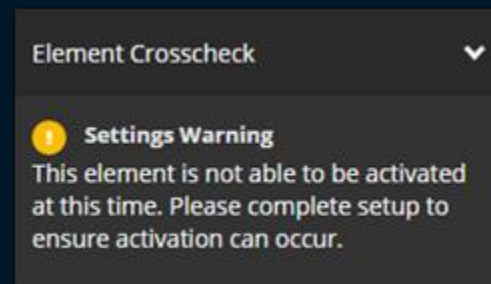
Element Content

The Element Content section will appear in the Settings Panel when an element with editable content is selected on the canvas (e.g. Signup Form, Email Campaign, Contact Changed, etc.). In this section there is a blue Edit button to direct you to the setup process for the respective element. Refer to the corresponding element sections in this guide to learn more about element setup.

You may also see a blue View button in the Element Content section to direct you to the crosscheck page for the element. Clicking this button will cause a pop-up window to appear indicating you must save the project before entering the setup for the element. Click the blue Save & Edit button to save the project and be directed to the element's crosscheck page or click Cancel to close the window without entering the crosscheck page.
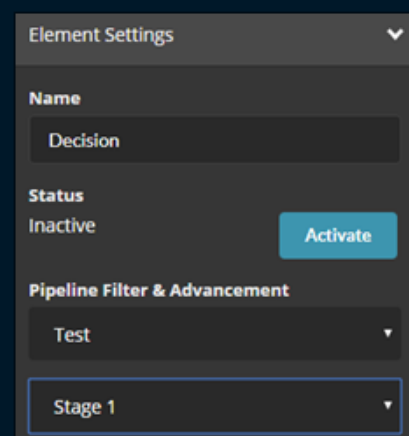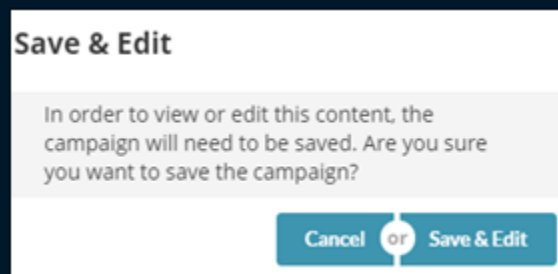
Element Settings

Element Settings are the settings that apply to a specific element. These settings vary, as certain settings are applicable exclusively to certain elements, but some are shared by all.

The three settings applicable to all elements are:

1. **Name:** The specific name you give that element. In the majority of cases, this can be edited.
[**Note:** You may see a blue Unlock button next to the name of the element. Clicking the Unlock button renames the element everywhere it is located within the SimplyCast application, including in other campaigns. For example, one signup 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.]
2. **Status:** Whether the element is active or inactive. Elements can be activated or deactivated at any time by clicking either the blue or red button respectively, but the change in status will only occur when the campaign is saved.
3. **Pipeline Filter & Advancement:** Choose whether contacts will move into a specific pipeline and pipeline stage when they reach a certain point in the campaign. Select the pipeline and stage from the dropdown menus available if desired.

[**Note:** Setting a pipeline stage for an element will always move the contact to that stage in the pipeline if their current stage is below the set stage or not set. If the contact's current pipeline stage is above the element's set stage, the contact will either move forward in the campaign with no changes to their stage if the element is a source element (signup form or the source of an interaction), or the contact will be halted in the workflow if the element is a destination element (any campaign element).]

For more instructions on these settings and a list of other settings specific to each element, refer to the section in this guide for the element you're working with.

Connection Settings

Connection Settings are the settings that apply to a connection between two specific elements. These settings will vary depending on the specific connection.

The settings that apply to every connection are:

1. **Action:** A description of the conditions under which the connection will trigger.

2. **Status:** Whether the connection is active or inactive. Connections can be activated or deactivated at any Time by clicking the blue or red button respectively, but the change in status will only occur when you save the campaign.

3. **Line Color:** The color of the line connecting the two elements. This can be edited using the color selector tool.
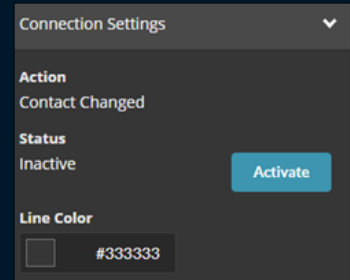
[**Note:** This Settings Panel section will only appear in the panel when you have a connection textbox between two elements selected with your mouse. Refer to the section in the guide for the element you're connecting for detailed instructions on editing connection settings.]

Element Reporting
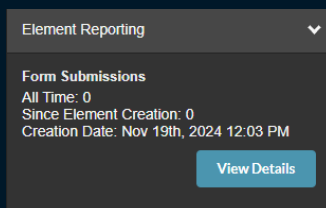
Element reporting displays information about the element in question. This information includes how many times the element has been triggered currently and since creation, as well as the date that it was created.

Clicking "View Details" will take you to the report page and allow you to view corresponding reports in full.

Connection Reporting

Connection Reporting functions similarly to Element Reporting. You can see how many times a connection has been activated here.