SimplyCast

SIMPLYCAST 360 USER GUIDE

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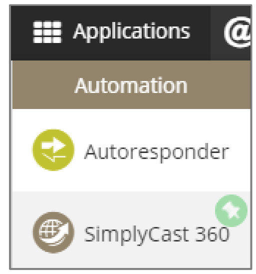
Overview

SimplyCast 360 allows organizations to easily map out and automate communication processes in order 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 common interface where they can be integrated into a campaign and deployed automatically with all the platform's other marketing and communication tools.

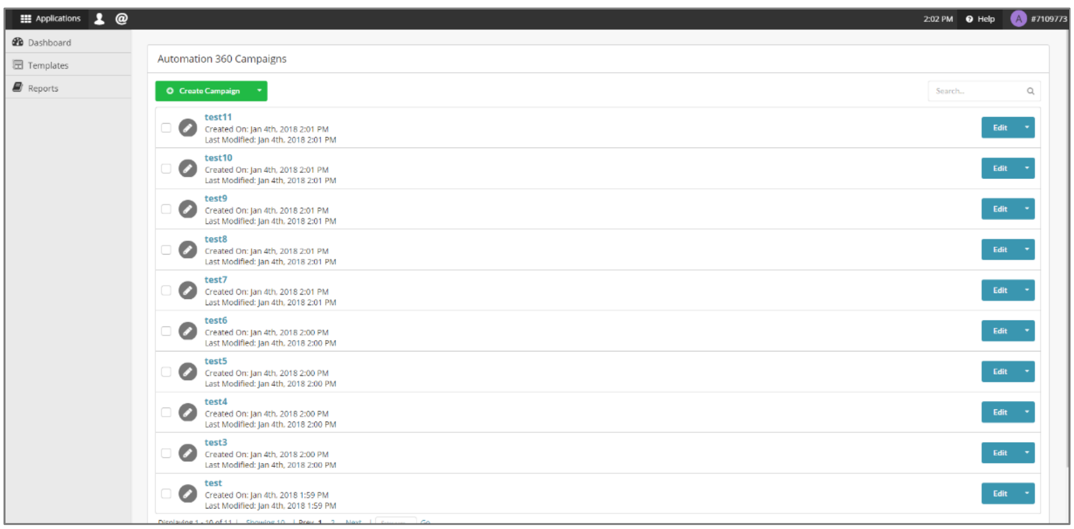
With SimplyCast 360, you can use a variety of drag-and-drop elements to create extensive campaigns, use rules and decisions to determine which messages are sent to whom and when exactly they are sent. Once you have a campaign structure set up with all the elements and decisions required, you are able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

SimplyCast 360 Dashboard



In order to set up and deploy a SimplyCast 360 campaign in the SimplyCast platform, first you will need to 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 created; and view the ones that are currently active, as well as any that are pending activation.



From the SimplyCast 360 Dashboard, you are able to:

Create a New SimplyCast 360 Campaign

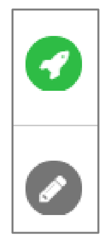
If you wish to create a new SimplyCast 360 campaign, there is a green Create Empty Campaign button at the top of the SimplyCast 360 Dashboard. Clicking this button will bring up a pop-up window where you can name the campaign. Enter a name into the field provided and click the green Create button to move onto 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 also create a new SimplyCast 360 campaign using a pre-made campaign template. Click the green Create Campaign From Template button to be directed to the Account Templates page. Refer to the *Templates* section 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.

You will be able to see four pieces of information:

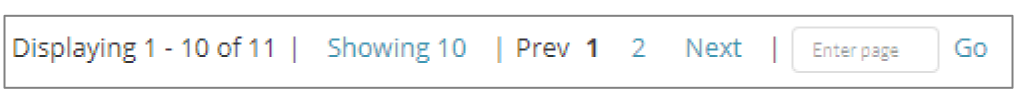


- **Name:** The name you gave your SimplyCast 360 campaign
- **Status:** Either a green or gray icon indicating whether the SimplyCast 360 campaign is active or inactive (green meaning active, gray meaning inactive)
- **Created On:** The date and time the campaign was created
- **Last Modified:** The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

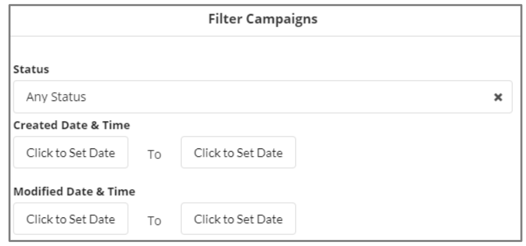
- Navigate to the bottom of your screen where you will find the page numbers indicating the total number of pages of SimplyCast 360 campaigns you have created.
- If the campaign you are looking for is not on the first page, click the "Next" button to look through older campaigns on later pages.
- Or, 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.



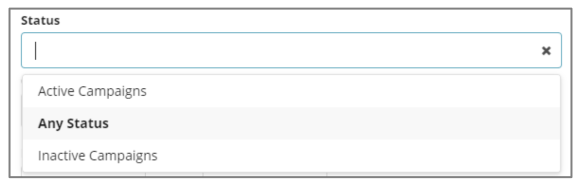
Filter SimplyCast 360 Campaigns

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

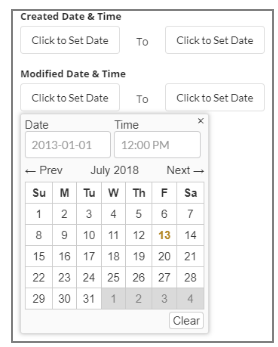
To filter your campaigns:



- Find the gray Filter button at the top right-hand side of your screen.
- Click the Filter button and a sidebar will appear with three fields 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.
- 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.



- Below the Status dropdown is the Created Date and Time field set, which allows you to filter based on when the campaigns were created. The second field set is the Modified Date and Time, which allows you to filter campaigns based on when the campaigns were last modified.
- Click any Click to Set Date box in either of these field sets, and another dropdown menu will show up with two fields labeled Date and Time where you can manually insert the date and time to filter campaigns from.
- Below these fields there is a calendar you can also use to choose the date that you would like to filter campaigns from.



- Click the blue Apply Filter button to implement the filter. Or, click Close if you do not wish to filter your campaigns, which will close the dropdown menu.

[**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:

- Select the search box in the top right-hand corner of the page.
- Type in the name you would like the system to search for.
- The list of SimplyCast 360 campaigns will automatically filter.
- To remove a search filter, clear the text in the search box. You will then return to the full list of SimplyCast 360 campaigns.

Edit a SimplyCast 360 Campaign

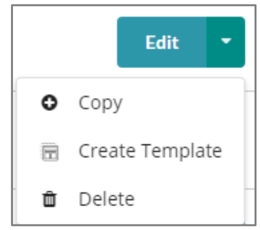
Once there are SimplyCast 360 campaigns created, they will appear in a list below the green Create Campaign button on the main SimplyCast 360 Dashboard.

To edit a SimplyCast 360 campaign:

- Click the blue Edit button located on the far-right side of the screen across from the corresponding campaign name.
- 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* section to learn more about editing SimplyCast 360 campaigns.

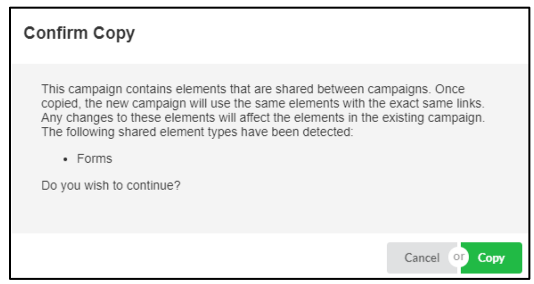
Copy Structure of a SimplyCast 360 Campaign

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



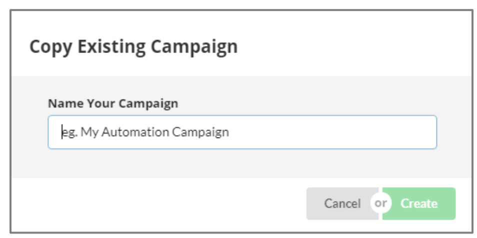
To copy a SimplyCast 360 campaign:

- 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.
- A pop-up window will appear to confirm the copying of the campaign. A warning may appear indicating that some campaign elements are shared by multiple campaigns.



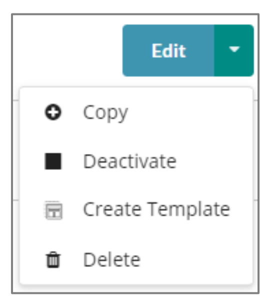
[**Note:** Copying a SimplyCast 360 campaign will not only copy the structure of the workflow, but all the content, decision settings, delays, etc.]

- Once you click Copy, a new pop-up appears where you can name your new 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.
- 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 that is saved to your Templates section for reuse by yourself of 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 how to create and manage your SimplyCast 360 templates.

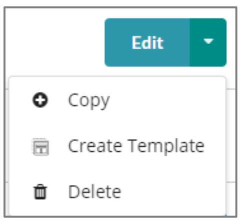


Delete a SimplyCast 360 Campaign

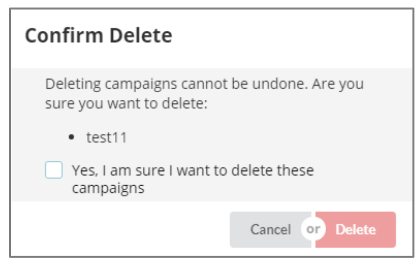
There are two ways to delete a SimplyCast 360 campaign:

- 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.

- 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.

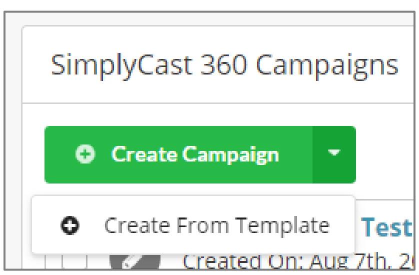


To confirm the deletion of the campaign:



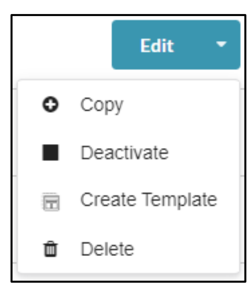
- Click the checkbox at the bottom of the pop-up to confirm that you want to delete the campaign.
- Click the red Delete button to delete the campaign.

Create a SimplyCast 360 Campaign from a Template

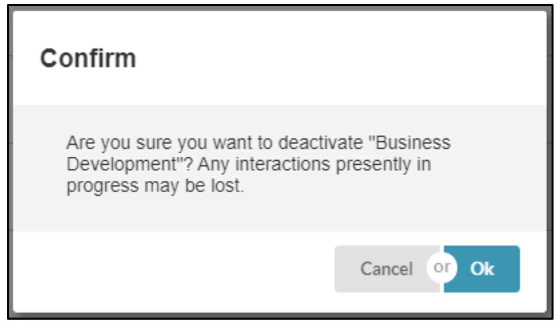


To create a new SimplyCast 360 campaign using a pre-created template, click the arrow button on the green Create campaign button in the SimplyCast 360 Dashboard. You will be directed to the Templates page where you are able to choose from a selection of templates available to your account and account network (if any). Refer to the *Templates* section 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. For more information about SimplyCast 360 reports, please refer to the *Reports* section.

Automation Flow Editor

The SimplyCast 360 Automation Flow Editor is where you can 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 creating a new campaign there are two terms you will need to know moving forward:

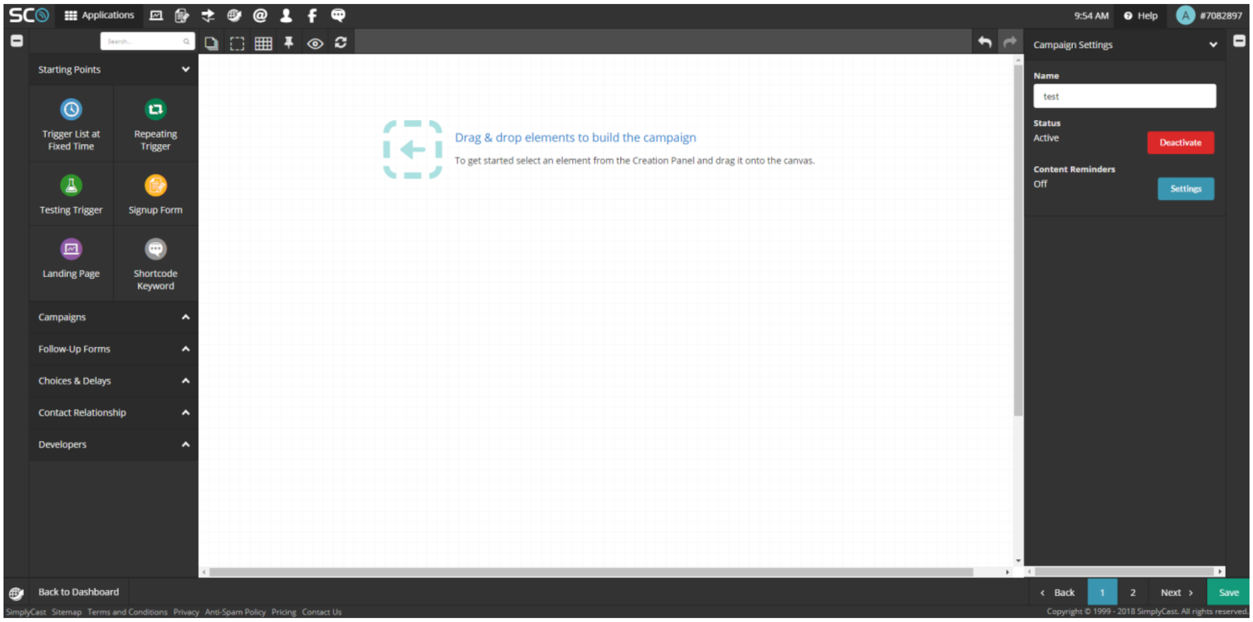
- **Element:** An element is one of the various tools or communication channels available for users to drag and drop onto the canvas and configure as part of a SimplyCast 360 campaign.
- **Connection:** A connection is a rule or condition that tells an element how a contact should interact with it when they pass through the campaign. Connections appear as boxes on the line connecting two elements.

[**Note:** Refer to the *Glossary* at the end of this guide for more key terms and definitions.]

To access the SimplyCast Automation Flow Editor:

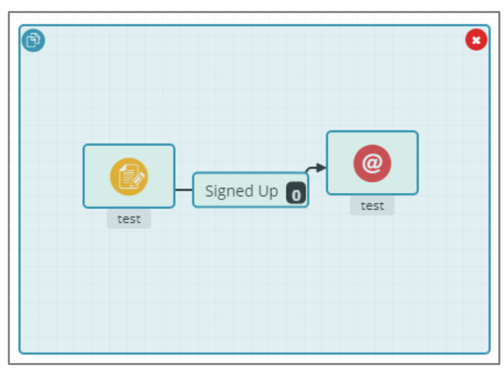
- From the SimplyCast 360 Dashboard, click the green Create Campaign button.
- A pop-up will appear where you will be asked to name the campaign. Type the name into the textbox provided.

- Click the green Create button to create the campaign, close the sidebar, and be redirected to the Automation Flow Editor. Or click Cancel to close the pop-up without creating a campaign.



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.



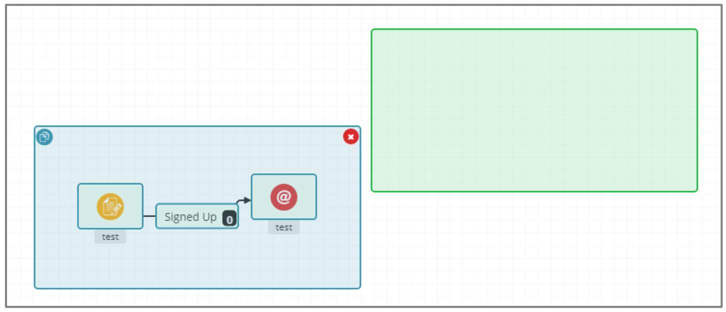
You are also able to highlight a section on the canvas containing multiple elements.

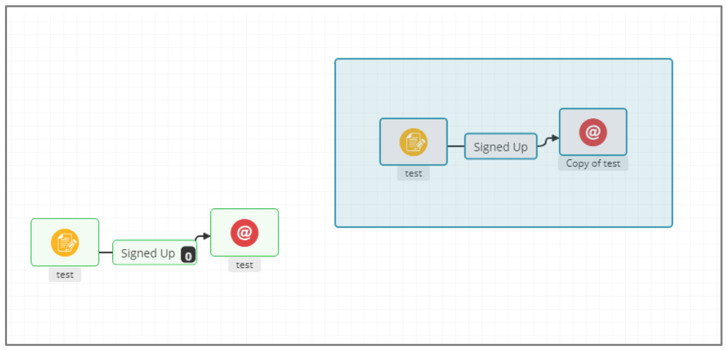
To do this:

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

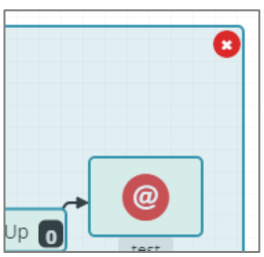
When you hover your mouse over a highlighted section of the canvas, you will see two new icons appear in the top corners of the blue box. On the left is a Copy All Selected icon, which allows you to create a second copy of the highlighted section in the canvas.

To do this:

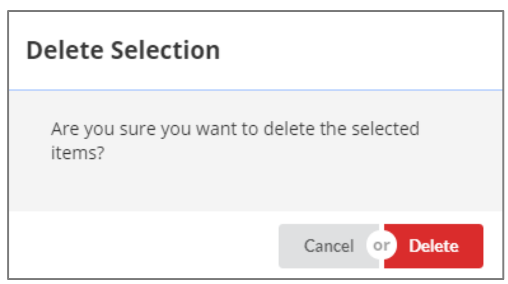




- Click and hold the mouse down on the Copy All Selected icon and drag the mouse to another spot on the canvas. You will see an empty green box appear when you drag the mouse.
- Drop the green box anywhere on the canvas and it will turn blue, becoming populated with the elements and connections you copied.
- 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.

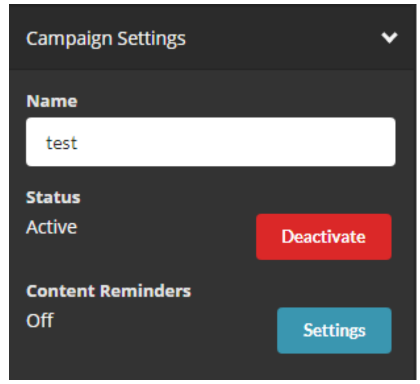


The last thing you can do with highlighted sections is move them around the canvas; this moves all the highlighted elements, widgets, and connections simultaneously as a block. To do this, click and hold the mouse down anywhere inside the highlighted section, and drag and drop the section around the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

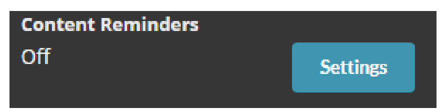
The campaign settings you can adjust are the following:

- **Name:** Edit the name of the campaign. Type the desired name into the textbox provided.
- **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.

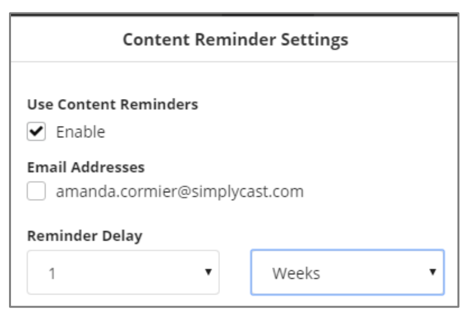
[**Note:** Keep in mind the campaign will not become active or inactive until you save the project after clicking the Activate/Deactivate button.]

- **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.

To set up a reminder:



> Click the blue Settings button in the Content Reminders field.
> A sidebar will appear with a checkbox to click to enable content reminders.
> 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.



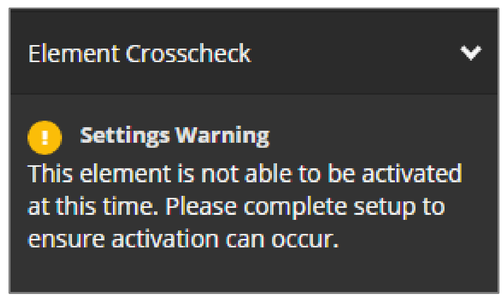
> The Email Addresses field is where you must choose at least one email address to send content reminders to. You will be able to choose from any emails associated with your account. Click the checkbox to the left of any email address to select it.

> 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.

> 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.

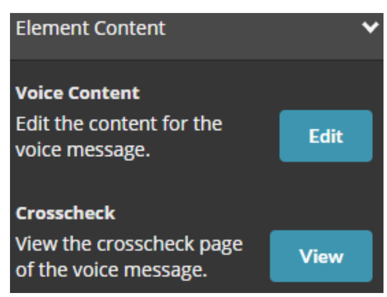
On the top right corner of Campaign Settings is a black and white “-“ button. Click this button to hide the Settings Panel. When the Settings Panel is hidden, the “-“ button will become a “+” button. Click this button to re-expand the Settings Panel.

Element Crosscheck



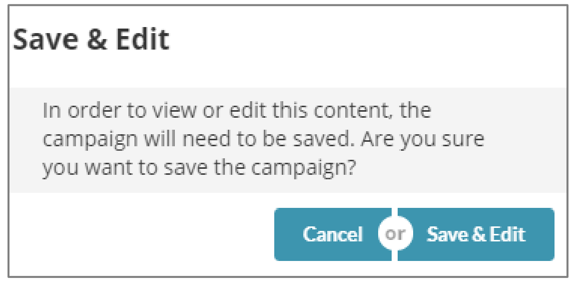
The Element Crosscheck section will only appear in the Settings Panel when there is an issue with the selected element that may need to be resolved before the campaign can be activated. The Element Crosscheck section will describe the issue and offer ways to solve the issue.

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.



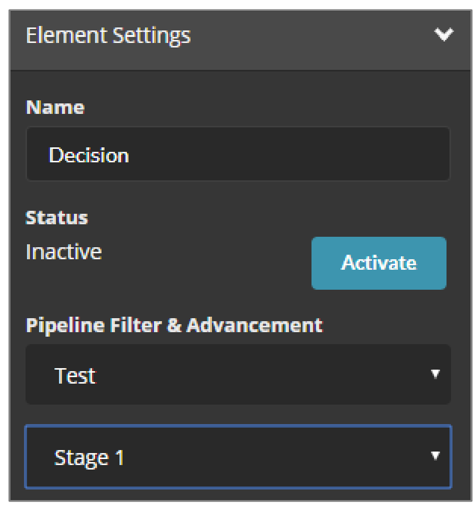
Element Settings

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:

- **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.]



- **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.
- **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.

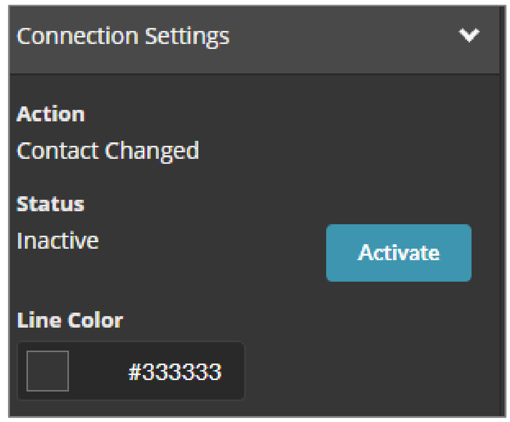
[**Note:** Setting a pipeline stage for an element will always move the contact to that stage in the pipeline if their current stage is below the set stage or not set. If the contact's current pipeline stage is above the element's set stage, the contact will either move forward in the campaign with no 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.

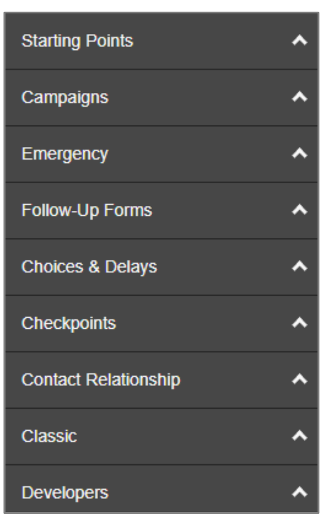
The settings that apply to every connection are:



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

Creation Panel

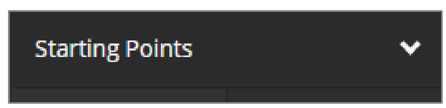


The Creation Panel is on the left side of the screen and contains all the SimplyCast 360 elements that can be dragged and dropped into the canvas, sorted into multiple tabs.

To add a SimplyCast 360 element to your campaign, either drag and drop the icon into the canvas or double-click the icon. There are nine different tabs of elements you can choose from.

These are:

- **Starting Points:** These elements can be used as a jumping off point in creating the SimplyCast 360 campaign and are typically used as a way to bring contacts into the flow.
- **Campaigns:** These elements are the different types of messages that can be sent to contacts who are part of the project and can be set up and customized in their respective editors.
- **Emergency:** These elements are part of SimplyCast's emergency suite of tools that can be used to send out notifications quickly and efficiently in the case of an emergency.
- **Follow-Up Forms:** These elements can be used to keep contact information up to date and ensure compliance.
- **Choices and Delays:** These elements can be used to create rules to determine when the next part of the SimplyCast 360 campaign will interact with contacts, which contacts it will interact with, and in what way they will interact.
- **Checkpoints:** These elements allow you to create and trigger checkpoints at specific points in the campaign where contacts can return if specific actions are taken/not taken.
- **Contact Relationship:** These elements allow the system to perform actions within the CRM. This could be in the form of updating a contact's profile, waiting on a CRM task, and more.
- **Classic:** These elements are older versions of current elements that are still supported in the SimplyCast application.
- **Developers:** These elements can be used to bring information, such as contact data, into the system from an external source, or push this data out from the system to an external source.

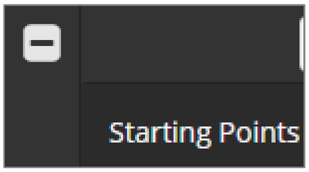


To open a tab in the Creation Panel, click on the tab name you want to open. The tab will expand to display the elements within that tab. To close the tab, click the tab name again.

Search for a specific element using the search bar above the Creation Panel. This saves you from having to open multiple tabs until you find the element needed. Enter your search query into the search bar and the elements displayed will begin to filter.

Once you find the element you're looking for, either double-click or drag-and-drop the element into the canvas to add it to your campaign or double click to add it to the canvas.

[**Note:** Elements that are unavailable to you for whatever reason will be grayed out and you will be unable to select them. If an element is unavailable due to insufficient subscription, double click the unavailable element to be redirected to your Account Subscription page where you can purchase more credits, or a different subscription, as required.]

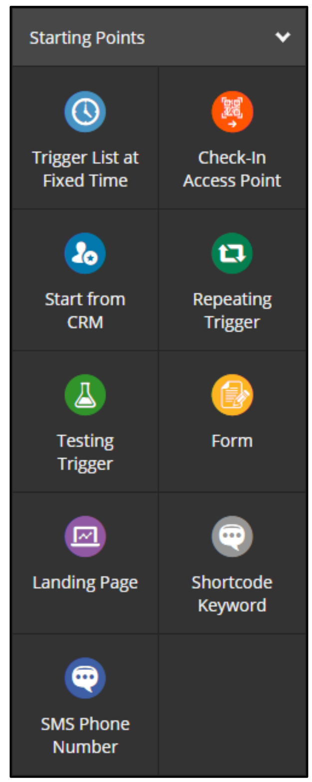


In the top left corner of the Creation Panel, there is a gray “-" button. To hide the Creation Panel and expand the Canvas, click this “-" button. Once the Creation Panel is hidden, the “-" button will turn into a “+” sign. When the Creation Panel is hidden, click the “+” sign to re-expand it.

Starting Points

The first tab in the Creation Panel on the left side of the screen is the Starting Points tab. The elements appearing in this tab are typically used to start contacts on their way through the SimplyCast 360 campaign.

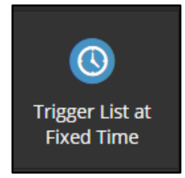
There are nine elements in this tab:



- **Trigger List at Fixed Time:** This element allows you to choose at what time to begin sending contacts from a contact list through the flow.
- **Check-in Access Point:** This element allows you to start a campaign when a contact checks in or out using a landing page.
- **Start From CRM:** This element allows you to start a SimplyCast 360 campaign from a contact’s profile within the CRM.
- **Repeating Trigger:** A repeating trigger starts a campaign repeatedly at an interval that you set. This element gives you a way to automatically trigger parts of your campaign at regular intervals. This could be useful for regularly checking scores and tags, for example.
- **Testing Trigger:** This element allows you to send a selection of contacts through the SimplyCast 360 campaign to test the campaign before sending your entire list(s) of contacts through it to ensure all elements behave as expected.
- **Form:** This element allows you to create a form that can be hosted on a website, landing page, or stand alone as a shareable URL. This is a good option to choose if you are collecting contact information.
- **Landing Page:** A landing page is a one-off webpage, not found on your company’s website, to provide readers with information on a specific topic, such as information about a company event. This element allows you to create a webpage accessible by clicking on a link on a website or in an email and contains a form these visitors can use to sign up for communications or to receive further information.

- **Shortcode Keyword:** This element allows you to use a shortcode keyword to trigger the SimplyCast 360 campaign. A shortcode is a five or six-digit number that you can send a text message to using a mobile phone. A keyword can be registered to the shortcode and will trigger a set of messages when texted to the shortcode.
- **SMS Phone Number:** This element allows you to start a campaign when a contact texts in to a phone number associated with your account.

Trigger List at a Fixed Time



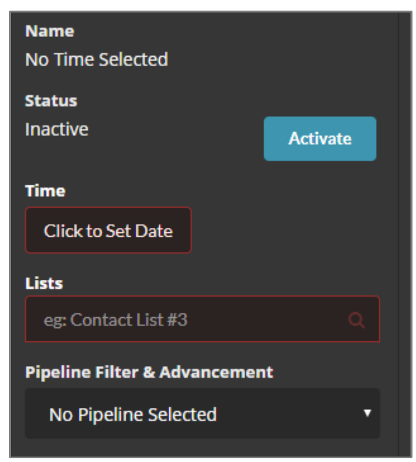
The first drag-and-drop element in the Starting Points tab is the Trigger List at Fixed Time element. This element allows you to choose at what time to begin sending contacts from a contact list through the flow.

[**Note:** Once a Trigger List at Fixed Time element has been used in a campaign, it cannot be re-used (e.g. when copying a campaign).]

To begin setting up this element:

- Click and drag or double click the Trigger List at Fixed Time element to add it to your canvas.
- Once the Trigger List at Fixed Time element is on your canvas and is selected with your mouse, five fields will appear in the Settings Panel to the right of the canvas.

These are:

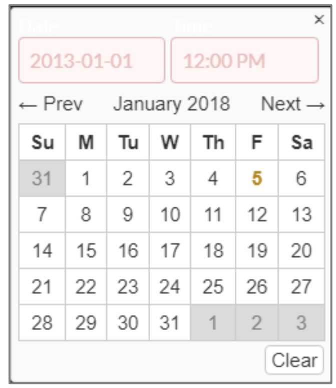


> **Name:** This field will automatically update to match the time selected in the Time field.

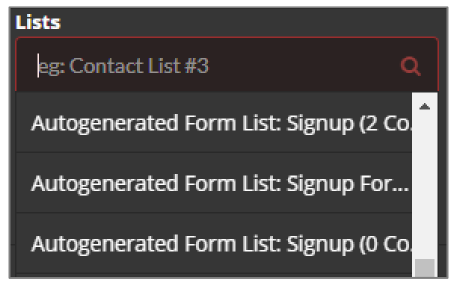
> **Status:** Activate or deactivate the element. To activate the element, click the blue Activate button. Activating an element means that the element will be able to be used as part of the campaign and should perform as expected. Activating the element will turn this button into a red Deactivate button. Click this red button to deactivate the activated element.

[**Note:** Keep in mind the element's status will not change until you save the campaign, or unless all the element's settings are configured correctly.]

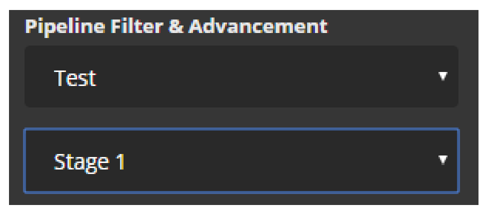
> **Time:** Choose the date and time the list(s) will be sent through the flow. Click on this field and a calendar dropdown will appear where you can select when you wish the campaign to be delayed until. If the time is already set, you can click the textbox containing the set time to change it if you would like, unless the time has already passed. Click anywhere outside of the dropdown, the "X" button in the top right corner, or press the Enter button, to close the calendar.

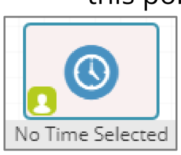


> **Lists:** Choose the list(s) to be sent through the campaign. When you click the textbox in the Lists field, a dropdown will appear with the names of all existing contact lists. Click the name of the list(s) you want to send through the campaign to select them. If there are too many lists to display at once, search for a list by typing the name of the list into the field. The dropdown will show the search results. Selected lists will be bolded and will appear below the field once the dropdown is closed. To remove a list, click the red "X" button next to the list to delete.

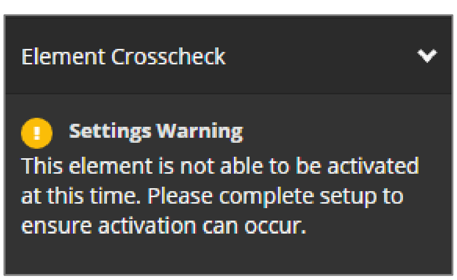


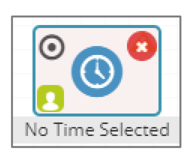
> **Pipeline Filter & Advancement:** Choose whether you would like contacts to progress through any pipelines you may have in the CRM. In the dropdown menu in this field, choose the pipeline you would like contacts to be added to. A second dropdown will appear to choose the stage of that pipeline contacts will be added to at this point of the campaign. If you choose to set a pipeline stage to this element, an icon will appear on the bottom left corner of the element in your campaign to indicate that contacts will move through a pipeline stage at this point in your campaign.





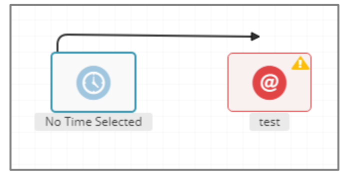
- If there is an issue with the element setup that needs to be resolved before the element can be activated, there will be a yellow or red exclamation point symbol in the top right corner of the element to signify this. If this is the case, when you select the element with your mouse, an additional section called Element Crosscheck will appear in the Settings Panel. The Element Crosscheck





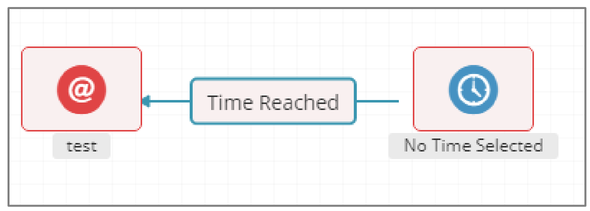
section will describe the issue with the element and provide instructions on how to resolve it.

- To connect your Trigger List at Fixed Time element to another element in your campaign, click the black target icon located on the top left corner of the element and drag it over to the element you wish to connect it to. Connecting these elements means that contacts can now pass from one to the other automatically if they meet the necessary criteria determined in the next step.

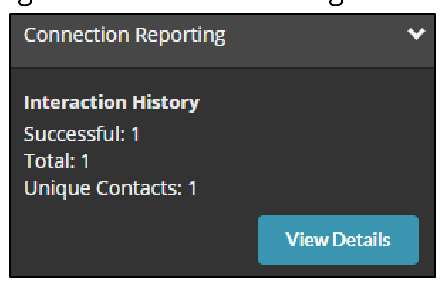


[**Note:** Some elements are not able to be connected to each other. For example, you cannot connect two Starting Point elements to each other, and you cannot connect a Starting Point element to the Contact Changed, Start from CRM, or Inbound API elements.]

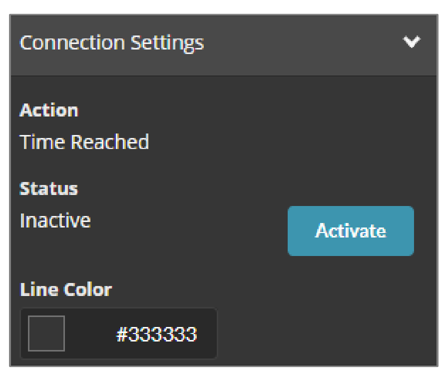
- Once a connection has been established between the Trigger List at Fixed Time element and at least one other element (multiple connections can be created between one element and multiple others), a textbox with the connection type will appear on the connection. Click on this textbox to open new sections in the Settings Panel.



- There will be two sections in the panel, Connection Reporting and Connection Settings.
- The Connection Reporting section contains the Interaction History. When you first create the connection, it will only show that there have been no interactions. Once the connection has triggered at least once, you will see more information. Interaction History will then show the number of Successful (and Unsuccessful, if any) triggers, the Total number of triggers, and the number of Unique Contacts who have triggered the trigger.



- The View Details button, when selected, will open the Connection History Sidebar, allowing you to see the history of all the interactions associated with the connection. See the section on Connection History for more information.There are four fields in the Connection Settings section. The first field is the Action field, which indicates the connection type (Time Reached).



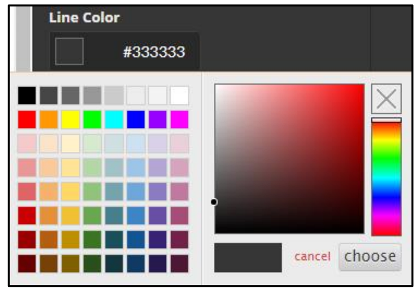
- The second field is the Description field, which will display a short description of when contacts will pass through the connection.

- The next field is the Status field where you can activate or deactivate the connection by clicking either the blue or red button respectively. Activating a connection means that the connection will be able to be used as part of the campaign and should perform as expected.

[**Note:** Keep in mind the connection will not become active until you save the campaign.]

- The last field is the Line Color field where you can choose the color of that connection's line.

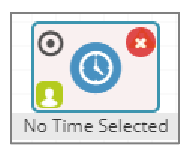
To choose a color:

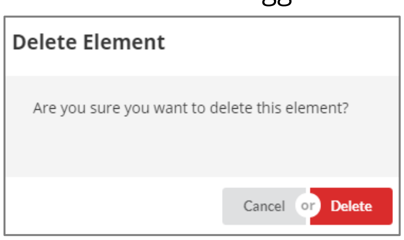


> Click on the color square in the field and a color selector will appear or enter the hex code of the color in the field next to the square.
> Choose your desired color from the pre-set swatches on the left side of the selector dropdown or use the right side to manually choose a color.
> Click the Choose 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.

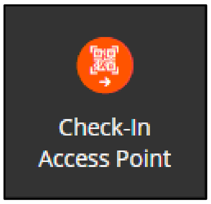
- To copy a connection, hover your mouse over the textbox appearing on the connection to show a blue button at the top left of the textbox. Copying a connection saves you from having to re-configure the settings for any additional connections requiring the same conditions, saving time. Click and drag this button to create a new connection that can be attached to a new element. All connection settings configured in the initial connection will be copied over to the new connection.

- Delete a connection by hovering over the connection's textbox and clicking the red "X" button.
- To delete the Trigger List at Fixed Time element from the canvas, hover your mouse over the element and click the red "X" button in the top right corner that appears. A pop-up window will appear asking you to confirm the deletion. Click the red Delete button to complete the deletion or Cancel to close the window without deleting the element.





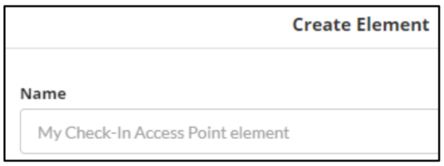
[**Note:** You will only receive the confirmation pop-up for deletion if the element has been activated or if the campaign has been saved.]



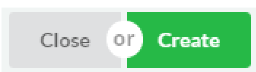
Check-In Access Point

The second element in the Starting Points tab is the Check-in Access Point element. This element allows a campaign to be started when a contact checks in or out from a facility.

To begin setting up this element:

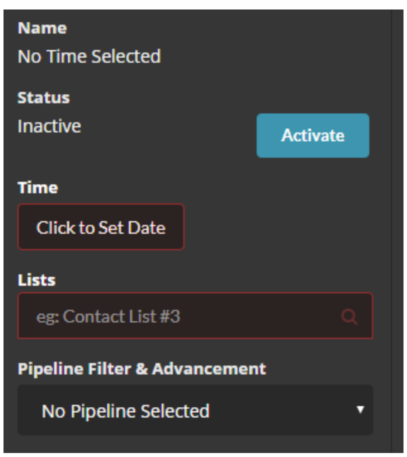


- Click and drag or double click the Check-In Access Point element to add it to your canvas.
- When you place the element, a sidebar will appear where you will be asked to enter a name for the new element. Type the name into the textbox provided.
- Click the green Create button to create the new element or click the gray Close button to close the sidebar without adding the new element.



- Once the Check-In Access Point element is on your canvas and is selected with your mouse, five fields will appear in the Settings Panel to the right of the canvas.

These are:

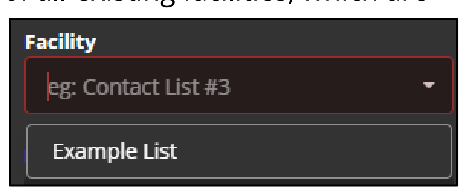


> **Name:** This field contains the name you selected when you added the element to the canvas. To change the name of your element, edit the name in the textbox provided.

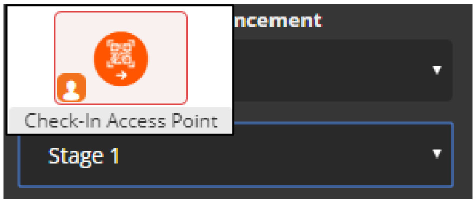
> **Status:** Activate or deactivate the element. To activate the element, click the blue Activate button. Activating an element means that the element will be able to be used as part of the campaign and should perform as expected. Activating the element will turn this button into a red Deactivate button. Click this red button to deactivate the activated element.

[**Note:** Keep in mind the element's status will not change until you save the campaign.]

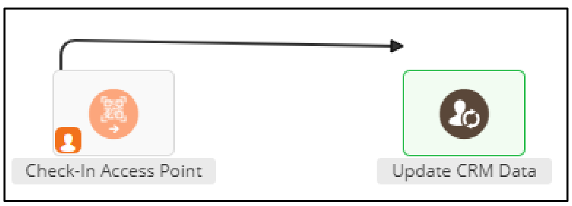
> **Facility:** Choose the Facility associated with the element. When you click the textbox in the Lists field, a dropdown will appear with the names of all existing facilities, which are lists being used by existing Landing Pages with Check-in Elements. Click the name of the facility you want to check for activity. If there are too many facilities to display at once, search for a facility by typing the name of the facility into the field. The dropdown will show the search results.



A selected facility will appear in the field once it has been selected. To remove a facility, click the gray “X” button next to the list to delete.

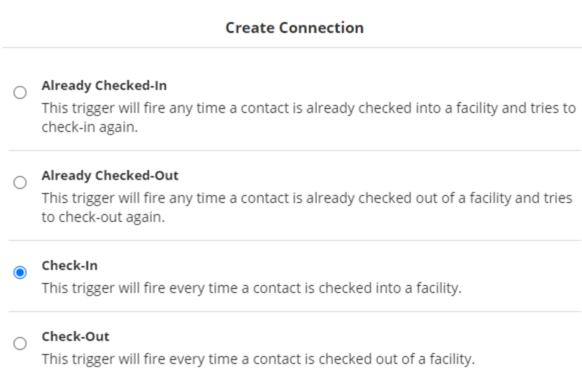


> **Pipeline Filter & Advancement:** Choose whether you would like contacts to progress through any pipelines you may have in the CRM. In the dropdown menu in this field, choose the pipeline you would like contacts to be added to. A second dropdown will appear to choose the stage of that pipeline contacts will be added to at this point of the campaign. If you choose to set a pipeline stage to this element, an icon will appear on the bottom left corner of the element in your campaign to indicate that contacts will move through a pipeline stage at this point in your campaign.



- To connect your Check-In Access Point element to another element in your campaign, click the black target icon located on the top left corner of the element and drag it over to the element you wish to connect it to. Connecting these elements means that contacts can now pass from one to the other automatically if they meet the necessary criteria determined in the next step.

[**Note:** Some elements are not able to be connected to each other. For example, you cannot connect two Starting Point elements to each other, and you cannot connect a Starting Point element to the Contact Changed, Start from CRM, or Inbound API elements.]



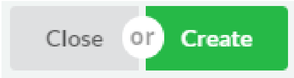
- Once you make the connection, a sidebar will appear with four options for the type of connection you’re creating:

> **Already Checked-In:** This option will cause the trigger to fire any time a contact is already checked into a facility and tries to check-in again.

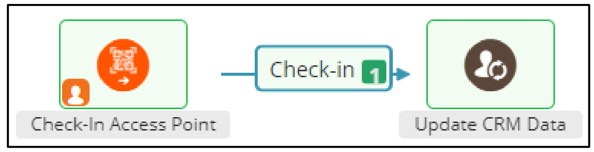
> **Already Checked-Out:** This option will cause the trigger to fire any time a contact is already checked out of a facility and tries to check-out again.

> **Check-In:** This option will cause the trigger to fire every time a contact is checked into a facility.

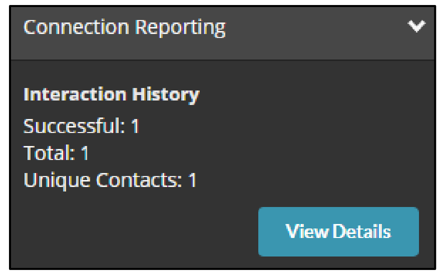
> **Check-Out:** This option will cause the trigger to fire every time a contact is checked out of a facility.



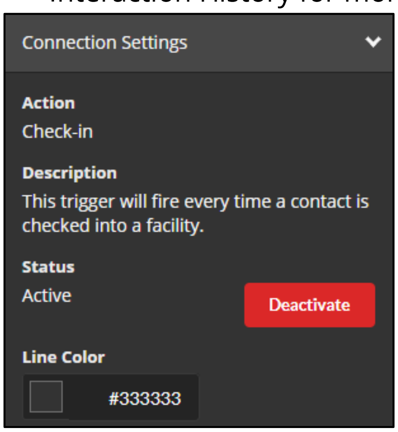
- Click the green Create button to connect the two elements or the gray Close button to close the sidebar without connecting the two elements.
- Once a connection has been established between the Check-In Access Point element and at least one other element, a textbox with the connection type will appear on the line.



- Click on this textbox to open the connection's settings in the Settings Panel.
- There will be two sections in the panel, Connection Reporting and Connection Settings.



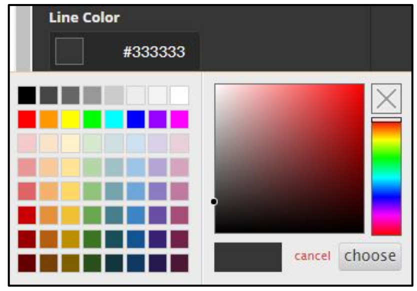
- The Connection Reporting section contains the Interaction History. When you first create the connection, it will only show that there have been no interactions. Once the connection has triggered at least once, you will see more information. Interaction History will then show the number of Successful (and Unsuccessful, if any) triggers, the Total number of triggers, and the number of Unique Contacts who have triggered the trigger.
- The View Details button, when selected, will open the Connection History Sidebar, allowing you to see the history of all the interactions associated with the element. See the section on Interaction History for more information.



- The first field of the Connection Settings section is the Action field, which indicates the connection type selected (Already Checked-In, Already Checked-Out, Check-In, Check-Out).
- The second field is the Description field which will display a short description for when the connection will be triggered.
- The next field is the Status field where you can activate or deactivate the connection by clicking the blue or red button respectively. Activating a connection means that the connection will be able to be used as part of the campaign and should perform as expected.

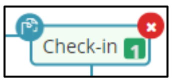
[**Note:** Keep in mind the connection will not become active until you save the campaign.]

- The last field is the Line Color field where you can choose the color of that connection's line.

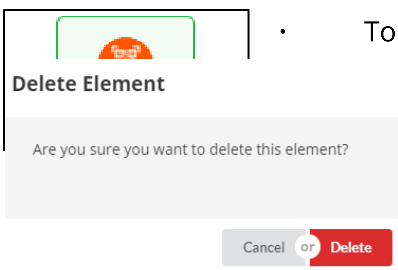


To choose a color:

> 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.
> Choose your desired color from the pre-set swatches on the left side of the selector dropdown or use the right side to manually choose a color.
> 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.



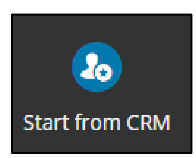
- To copy a connection, hover your mouse over the textbox appearing on the connection to show a blue button at the top left of the textbox. Copying a connection saves you from having to re-configure the settings for any additional connections requiring the same conditions, saving time. Click and drag this button to create a new connection that can be attached to a new element. All connection settings configured in the initial connection will be copied over to the new connection.
- Delete a connection by hovering over the connection's textbox and clicking the red "X" button.



- To delete the Check-In Access Point from the canvas, hover your mouse over the element and click the red "X" button in the top right corner that appears. A pop-up window will appear asking you to confirm the deletion. Click the red Delete button to complete the deletion or Cancel to close the window without deleting the element.

[**Note:** You will only receive the confirmation pop-up for deletion if the element has been activated or if the campaign has been saved.]

Start from CRM

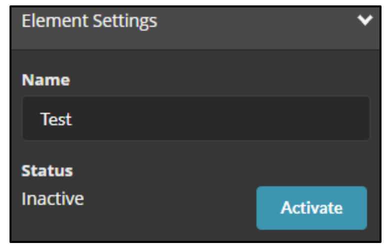


The next drag-and-drop element in the Starting Points tab is the Start from CRM element. This element allows you to start a SimplyCast 360 campaign from a contact's profile within the CRM.

To begin setting up this element:

- Click and drag the Start from CRM element or double click it to add it to the canvas.
- When you place the element, a sidebar will appear where you will be asked to enter a name for the new element. Type the name into the textbox provided.

- Click the green Create button to create the new element or click the gray Close button to close the sidebar without adding the new element.
- Once you have placed the element onto the canvas and have it selected with your mouse, three additional fields will appear in the Element Settings section on the right-hand side of your screen:

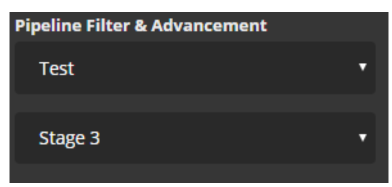


  > **Name:** This field contains the name you selected when you added the element to the canvas. To change the name of your element, edit the name in the textbox provided.

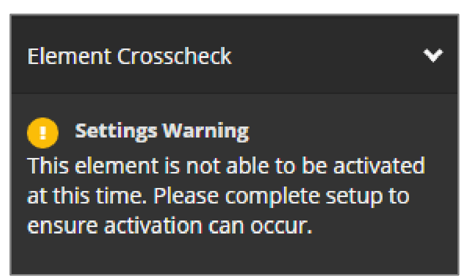
  > **Status:** This field is where you can activate or deactivate the element by clicking the blue or red button respectively. Activating an element means that the element will be able to be used as part of the campaign and should perform as expected.

[**Note:** Keep in mind the element will not become active until you save the campaign.]

- **Pipeline Filter & Advancement:** Choose whether you would like contacts to progress through any pipelines you may have. In the dropdown menu in this field, choose the pipeline you would like contacts to be added to. A second dropdown will appear to choose the stage of that pipeline contacts will be added to at this point of the campaign. If you choose to set a pipeline stage to this element, an icon will appear on the bottom left corner of the element in your campaign to indicate that contacts will move through a pipeline stage at this point in your campaign.

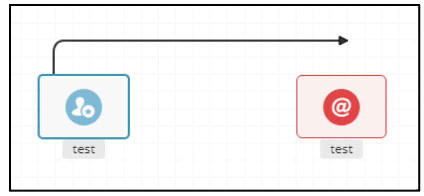


- If there is an issue with the element that needs to be resolved before the element can be activated, there will be a yellow or red exclamation point symbol in the top right corner of the element to signify this. If this is the case, when you select the element with your mouse, an additional section called Element Crosscheck will



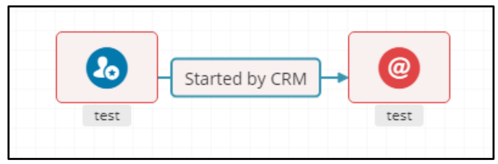
appear in the Settings Panel. The Element Crosscheck section will describe the issue with the element and provide instructions on how to resolve it.

- To connect your Start from CRM element to another element in your campaign, click the black target icon located on the top corner of your element and drag it over to the element you wish to connect it to.

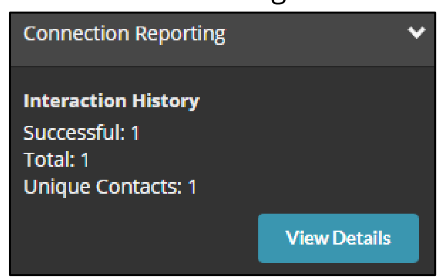


[**Note:** Some elements are not able to be connected to each other. For example, you cannot connect two Starting Point elements to each other, and you cannot connect a Starting Point element to the Contact Changed, Start from CRM, or Inbound API elements.]

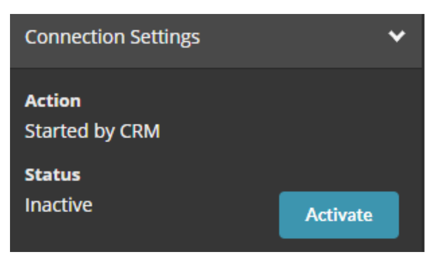
- Once a connection has been established between the Start from CRM element and at least one other element, a textbox with the connection type will appear on the line. Click on this textbox to open two new sections in the settings panel, Connection Reporting and Connection Settings.



- The Connection Reporting section contains the Interaction History. When you first create the connection, it will only show that there have been no interactions. Once the connection has triggered at least once, you will see more information. Interaction History will then show the number of Successful (and Unsuccessful, if any) triggers, the Total number of triggers, and the number of Unique Contacts who have triggered the trigger.



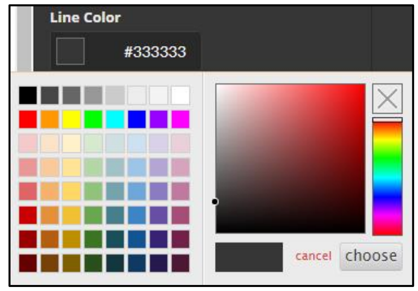
- The View Details button, when selected, will open the Connection History Sidebar, allowing you to see the history of all the interactions associated with the element. See the section on Interaction History for more information.
- The first Connection Settings field is the Action field, which indicates the connection type (Started by CRM).
- The second field is the Description field, which will display a short description of when contacts will pass through the connection.
- The next field is the Status field where you can activate or deactivate the connection by clicking the blue or red buttons respectively. Activating a connection means that the connection will be able to be used as part of the campaign and should perform as expected.



[**Note:** Keep in mind the connection will not become active until you save the campaign.]

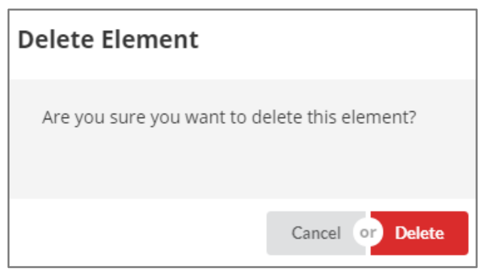
- The last field is the Line Color field where you can choose the color for that connection's line.

To choose a color:



> 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.
> Choose your desired color from the pre-set swatches on the left side of the selector dropdown or use the right side to manually choose a color.
> 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.

- To copy a connection, hover your mouse over the textbox appearing on the connection to show a blue button at the top left of the textbox. Copying a connection saves you from having to re-configure the settings for any additional connections requiring the same conditions, saving time. Click and drag this button to create a new connection that can be attached to a new element. All connection settings configured in the initial connection will be copied over to the new connection.
- Delete a connection by hovering over the connection's textbox and clicking the red "X" button.
- To delete the element from the campaign, hover your mouse over the element and click the red "X" button in the top right corner that appears. A pop-up window will appear asking you to confirm the deletion. Click the red Delete button to complete the deletion or Cancel to close the window without deleting the element.

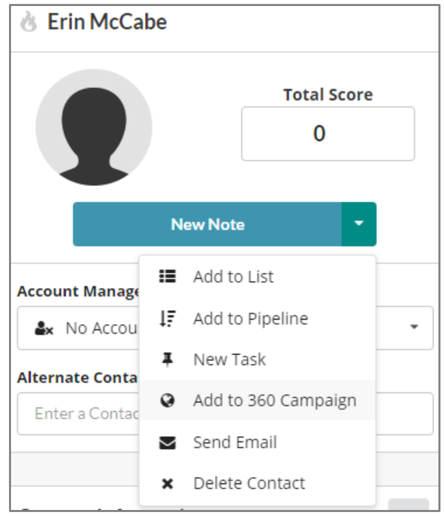


[**Note:** You will only receive the confirmation pop-up if the element has been activated or if the campaign has been saved.]

Add a Contact to a SimplyCast 360 Campaign from the CRM

You may choose to manually add a specific contact to a SimplyCast 360 campaign. You can do this from their contact profile in the CRM.

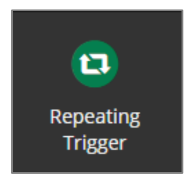
From the contact profile:



- Navigate to the blue New Note button on the left side of the screen.
- Click the arrow button on the right of this button to produce a dropdown menu.
- Select the Add to 360 Campaign option in this menu and a sidebar will appear from the right side of the screen where you are asked to choose a SimplyCast 360 campaign to add the contact to.
- Click the blue Save button at the bottom of the sidebar to add the contact to the campaign or click Cancel to close the sidebar without adding the contact to the SimplyCast 360 campaign.

[**Note:** Only SimplyCast 360 campaigns that contain a Start from CRM element will appear in this dropdown menu. Contacts will start from the Start from CRM element in the selected campaign.]

Repeating Trigger



The next drag-and-drop element in the Starting Points tab is the Repeating Trigger element. A repeating trigger starts a campaign repeatedly at an interval that you set. This element gives you a way to automatically trigger parts of your campaign at regular intervals. This could be useful for regularly checking scores and tags, for example.

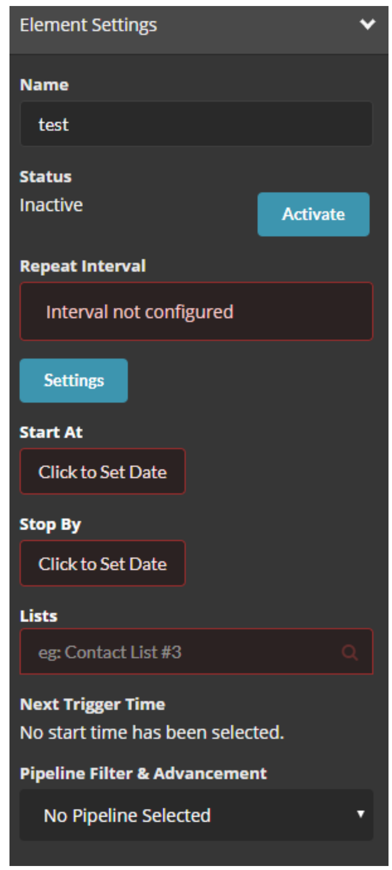
To begin setting up your repeating trigger:

- Click and drag the Repeating Trigger element or double click it to add it to your canvas.
- When you place the element, a sidebar will appear with a field asking you to enter a name for the new repeating trigger. Type the name into the textbox provided.
- Click the green Create button to create the repeating trigger and close the pop-up window. Or, click the gray Close button to close the window without creating a repeating trigger.
- Once you have placed the Repeating Trigger element in your canvas and have it selected with your mouse, eight fields will appear in the Element Settings section on the right-hand side of the screen.

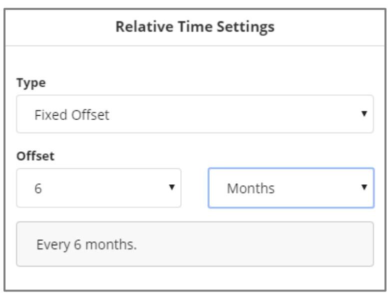
These are:

> **Name:** The name you selected when you added the element to the canvas. To change the name of your element, edit the name in the textbox provided.
> **Status:** Activate or deactivate the element by clicking the blue or red button respectively. Activating an element means that the element will be able to be used as part of the campaign and should perform as expected.

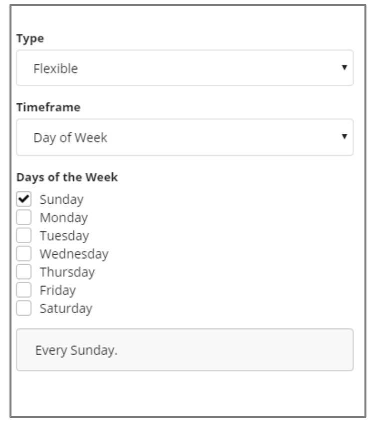
[**Note:** Keep in mind the element will not become active or inactive until you save the campaign.]



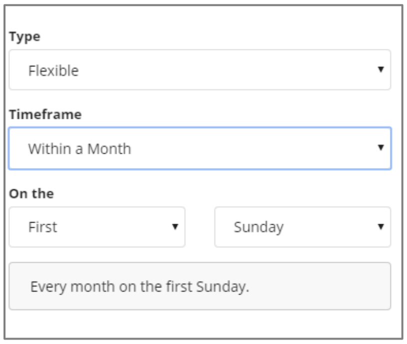
> **Repeat Interval:** This option has a blue Settings button to use to determine how often contacts will be sent through the SimplyCast 360 campaign. Clicking this button will open a sidebar where you can configure the interval of time you wish the repeating trigger to be activated. Select the type of interval you would like to use from the Type dropdown: Fixed Offset or Flexible.



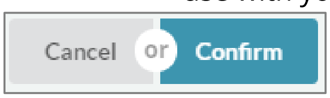
>> Fixed offset means that the delay will be a fixed amount of time before the contacts will continue their progress in the campaign. Choosing Fixed Offset as your interval type will cause the Offset field to appear. This field includes two dropdowns and a textbox. Choose your unit of time from the dropdown on the right (hours, days, weeks, or months), and in the dropdown on the left, choose the number of the selected time unit. The textbox beneath the dropdowns will describe the time interval you selected. For example, if you chose "Months" in the dropdown on the right and "6" on the left, the textbox will explain that the trigger will repeat every six months.



>> A flexible delay means the delay can be set to customized lengths of time, rather than a specific, fixed time. Choosing Flexible as your schedule type causes a Timeframe dropdown field to appear. In this field, choose whether you want the trigger to repeat on certain days of the week or certain days within a month. Selecting the Day of Week option will cause a Days of the Week field to appear where you must select the days of the week you wish the trigger to be repeated. Selecting the Within a Month option will cause two new fields to appear. In the first field you will choose the week of the month you wish the trigger to be repeated, and in the second field you will select the day of the week. The textbox below will describe the interval configured.

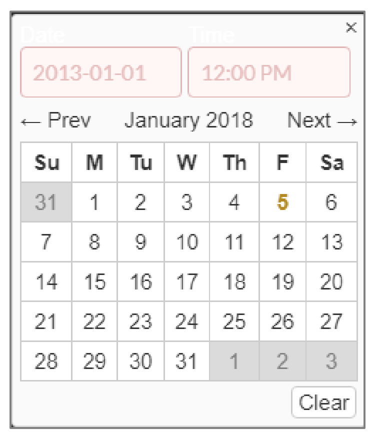


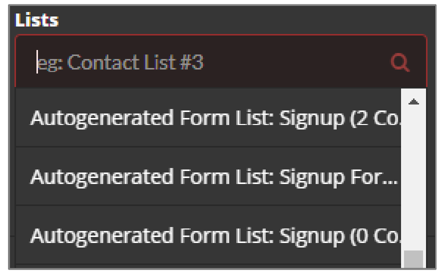
>> Once you have determined your interval type and have selected the timeframe to use with your repeating trigger, click the blue Confirm button to save your settings and close the sidebar, or click the Cancel button to close the sidebar without configuring your time settings.



> **Start At:** Choose the date you wish to start the repeating trigger. Click the Click to Set Date textbox and a calendar will appear to select the date and time to start the repeating trigger. Click anywhere outside the calendar to close the dropdown and confirm the calendar settings or click the Clear button to close the pop-up without saving your calendar settings or clear any existing settings.

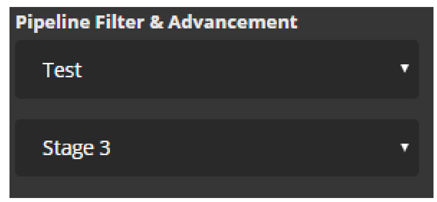
> **Stop By:** Choose the date you wish to stop the repeating trigger. Click the Click to Set Date textbox and a calendar will appear to select the date and time to stop the repeating trigger. Click anywhere outside the calendar to close the pop-up and confirm the calendar settings or click the Clear button to close the pop-up without saving your calendar settings or clear any existing settings.





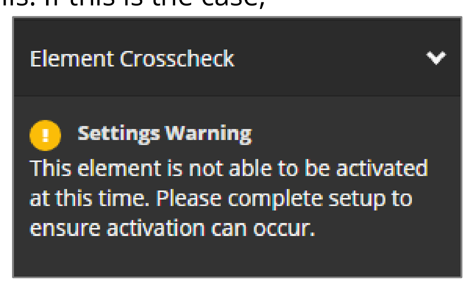
> **Lists:** Select one or multiple contact lists to send through the repeating trigger. To search for a specific list, click the textbox provided and start typing the name of the list you'd like. The search results will automatically begin to filter. Click the name of your chosen list(s) to select them; selected contact lists will have their names bolded. Click anywhere outside of the textbox to close the dropdown and the selected contact lists will be displayed below the textbox. To remove any of your selected lists, click the red "X" beside the name of the list you would like to remove.

> **Next Trigger Time:** This field will display the next time the repeating trigger will occur based on what was chosen in the Repeat Interval, Start At, and Stop By fields. If no selections have been made in these fields, the Next Trigger Time field will state "No start time has been selected."

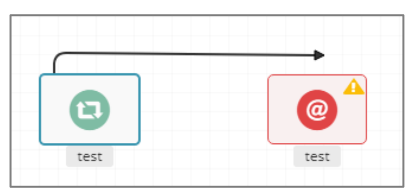


> **Pipeline Filter and Advancement:** Choose whether you would like contacts to progress through any pipelines you may have associated with the campaign. In the dropdown menu in this field, choose the pipeline you would like contacts to be added to. A second dropdown will appear to choose the stage of that pipeline contacts will be added to at this point of the campaign. If you choose to set a pipeline stage to this element, an icon will appear on the bottom left corner of the element in your campaign to indicate that contacts will move through a pipeline stage at this point in your campaign.

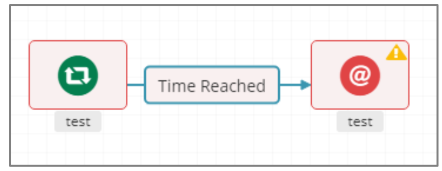
- If there is an issue with the element setup that needs to be resolved before the element can be activated, there will be a yellow or red exclamation point symbol in the top right corner of the element to signify this. If this is the case, when you select the element with your mouse, an additional section called Element Crosscheck will appear in the Settings Panel. The Element Crosscheck section will describe the issue with the element and provide instructions on how to resolve it.



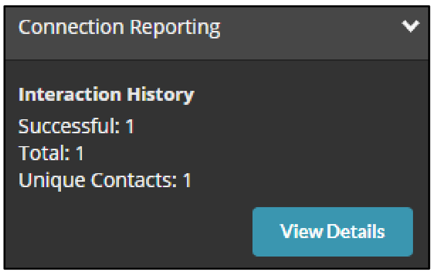
- To connect your Repeating Trigger element to another element in your campaign, click the black target image on the top left corner of the element and drag it over to the element you wish to connect it to.



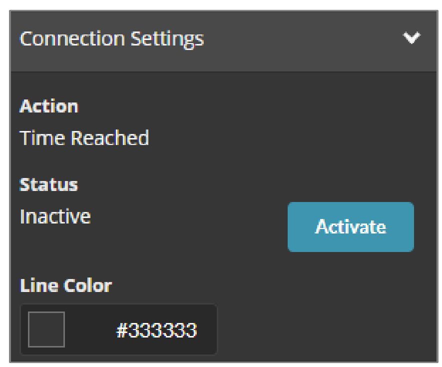
[**Note:** Some elements are not able to be connected to each other. For example, you cannot connect two Starting Point elements to each other, and you cannot connect a Starting Point element to the Contact Changed, Start from CRM, or Inbound API elements.]



- Once a connection has been established between the Repeating Trigger element and at least one other element, a textbox with the connection type will appear on the line. Click on this textbox to open two new sections on the right-hand side of the screen, Connection Reporting and Connection Settings.



- The Connection Reporting section contains the Interaction History. When you first create the connection, it will only show that there have been no interactions. Once the connection has triggered at least once, you will see more information. Interaction History will then show the number of Successful (and Unsuccessful, if any) triggers, the Total number of triggers, and the number of Unique Contacts who have triggered the trigger.
- The View Details button, when selected, will open the Connection History Sidebar, allowing you to see the history of all the interactions associated with the element. See the section on Interaction History for more information.

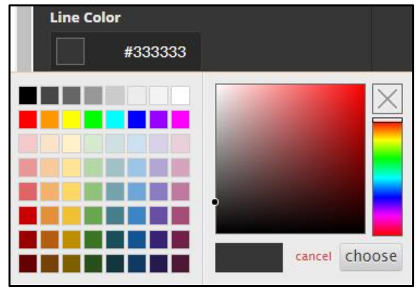


- There are four fields in the Connection Settings section. The first field is the Action field, which indicates the connection type (Time Reached).
- The second field is the Description field, which will display a short description of when contacts will pass through the connection.
- The next field is the Status field where you can activate or deactivate the connection by clicking either the blue or red button respectively. Activating a connection means that the connection will be able to be used as part of the campaign and should perform as expected.

[**Note:** Keep in mind the connection will not become active until you save the campaign.]

- The last field is the Line Color field where you can choose the color of that connection's line.

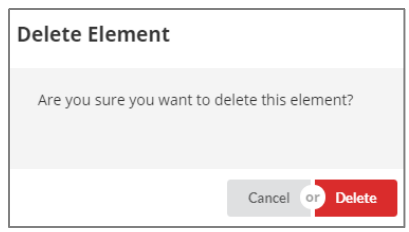
To choose a color:



> 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.
> Choose your desired color from the pre-set swatches on the left side of the selector dropdown or use the right side to manually choose a color.
> 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.

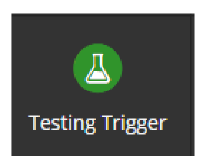
- To copy a connection, hover your mouse over the textbox appearing on the connection to show a blue button at the top left of the textbox. Copying a connection saves you from having to re-configure the settings for any additional connections requiring the same conditions, saving time. Click and drag this button to create a new connection that can be attached to a new element. All connection settings configured in the initial connection will be copied over to the new connection.

- Delete a connection by hovering over the connection's textbox and clicking the red "X" button.
- To delete the element from the campaign, hover your mouse over the element and click the red "X" button in the top right corner that appears. A pop-up window will appear asking you to confirm the deletion. Click the red Delete button to complete the deletion or Cancel to close the window without deleting the element.



[**Note:** You will only receive the confirmation pop-up for deletion if the element has been activated or if the campaign has been saved.]

Testing Trigger



The next drag-and-drop element in the Starting Points tab is the Testing Trigger element. This element allows you to send a selection of contacts through the SimplyCast 360 campaign to test the campaign before sending your entire list(s) of contacts through it to ensure all elements behave as expected.

To begin setting up this element:

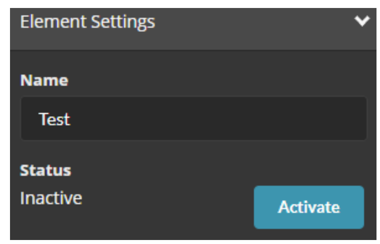
- Click and drag the Testing Trigger element or double click it to add it to your canvas.
- When you place the element, a sidebar will appear with a field that will ask you to enter a name for the new testing trigger. Type the name into the textbox provided.

- Click the green Create button to save your settings, add the element to the canvas, and close the sidebar. Or, click the gray Close button to close the sidebar without adding the Testing Trigger element.

- Once you have placed the element onto your canvas and have it selected with your mouse, four fields will appear in the Element Settings section in the Settings Panel on the right-hand side of the screen:

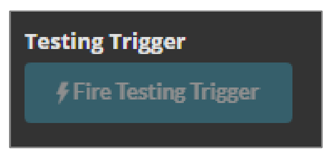
> **Name:** The name you selected when you added the element to the canvas. To change the name of your element, edit the name in the textbox provided.

> **Status:** Activate or deactivate the element by clicking the blue or red button respectively. Activating an element means that the element will be able to be used as part of the campaign and should perform as expected.



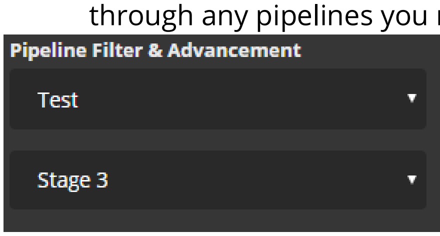
[**Note:** Keep in mind the element will not become active until you save the campaign.]

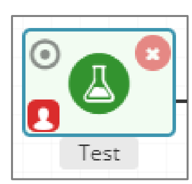
> **Testing Trigger:** Clicking the blue Fire Testing Trigger button in this field will cause a sidebar to appear with a table of contact lists to choose from to send through the campaign using the testing trigger element. Refer to the next section to learn how to set up and fire the Testing Trigger.



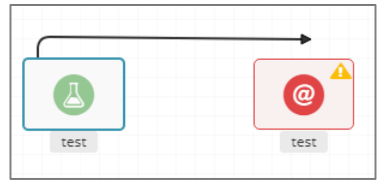
[**Note:** Keep in mind you will only be able to click this button once all elements connected to the Testing Trigger element are activated and the campaign has been saved.]

> **Pipeline Filter & Advancement:** Choose whether you would like contacts to progress through any pipelines you may have associated with the campaign. In the dropdown menu in this field, choose the pipeline you would like contacts to be added to. A second dropdown will appear to choose the stage of that pipeline contacts will be added to at



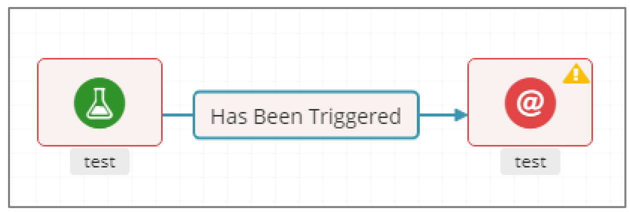


this point of the campaign. If you choose to set a pipeline stage to this element, an icon will appear on the bottom left corner of the element in your campaign to indicate that contacts will move through a pipeline stage at this point in your campaign.

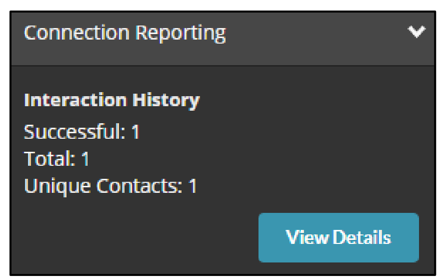


- To connect your Testing Trigger element to another element in your campaign, click the black target image located on the top left corner of the element and drag it over to the element you wish to connect it to.

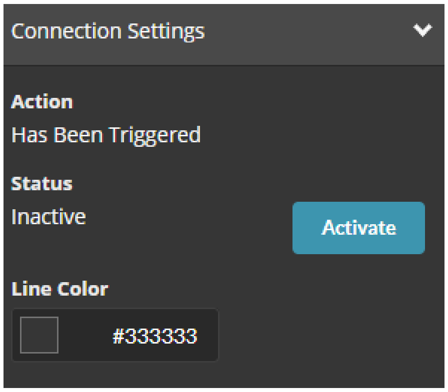
[**Note:** Some elements are not able to be connected to each other. For example, you cannot connect two Starting Point elements to each other, and you cannot connect a Starting Point element to the Contact Changed, Start from CRM, or Inbound API elements.]



- Once a connection has been established between the Testing Trigger element and at least one other element, a textbox with the connection type will appear on the line. Click on this textbox to open a new sections on the right-hand side of the screen, Connection Reporting and Connection Settings.



- The Connection Reporting section contains the Interaction History. When you first create the connection, it will only show that there have been no interactions. Once the connection has triggered at least once, you will see more information. Interaction History will then show the number of Successful (and Unsuccessful, if any) triggers, the Total number of triggers, and the number of Unique Contacts who have triggered the trigger.
- The View Details button, when selected, will open the Connection History Sidebar, allowing you to see the history of all the interactions associated with the element. See the section on Interaction History for more information.

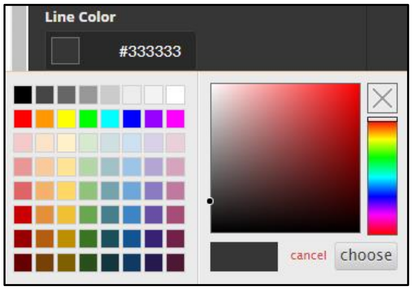


- There are four fields in the Connection Settings section. The first field is the Action field, which indicates the connection type (Has Been Triggered).
- The second field is the Description field, which will display a short description of when contacts will pass through the connection.
- The next field is the Status field where you can activate or deactivate the connection by clicking either the blue or red button respectively. Activating a connection means that the connection will be able to be used as part of the campaign and should perform as expected.

[**Note:** Keep in mind the connection will not become active until you save the campaign.]

- The last field is the Line Color field where you can choose the color for that connection's line.

To choose a color:

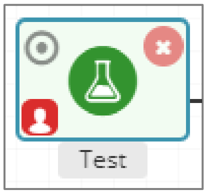


> Click on the color square in the field and a color selector will appear or enter the hex code of the color in the field next to the square.
> Choose your desired color from the pre-set swatches on the left side of the selector dropdown or use the right side to manually choose a color.
> Click the Choose 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.

- To copy a connection, hover your mouse over the textbox appearing on the connection to show a blue button at the top left of the textbox. Copying a connection saves you from having to re-configure the settings for any additional connections requiring the same conditions, saving time. Click and drag this button to create a new connection that can be attached to a new element. All connection settings configured in the initial connection will be copied over to the new connection.

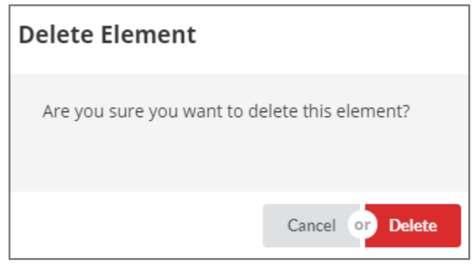
- Delete a connection by hovering over the connection's textbox and clicking the red "X" button.

- To delete the element from the campaign, hover your mouse over the element and click the red "X" button in the top right corner that appears. A pop-up window will appear asking you

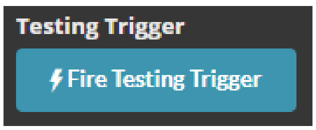


to confirm the deletion. Click the red Delete button to complete the deletion or Cancel to close the window without deleting the element.

[**Note:** You will only receive the confirmation pop-up if the element has been activated or if the campaign has been saved.]



Fire a Testing Trigger



The Testing Trigger element can be triggered manually if the SimplyCast 360 project and all relevant elements have been activated so that the blue Fire Testing trigger button in the Settings Panel is active.

To fire the Testing Trigger element:

- Select the Testing Trigger element in the SimplyCast 360 project. The blue Fire Testing Trigger button in the Settings Panel will now be available to click.
- Once clicking the button, a sidebar will appear containing a table of all contacts in the account's CRM that can be selected to test the campaign.

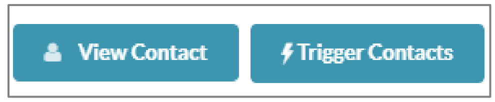
There are six information fields available in this table:

☐	Name	Email	Phone ...	Mobile N...	Fax Nu...	Created Time
☐	Erin McCabe	erinle...	+190229...		+190283...	Dec 14th, 2015 8:17 PM

> **Name:** The name of the contact (if available)
> **Email:** The email address of the contact (if available)
> **Phone Number:** The phone number of the contact (if available)
> **Mobile Number:** The mobile phone number of the contact (if available)
> **Fax Number:** The fax number of the contact (if available)
> **Created Time:** The date and time the contact was created in the CRM

- Select one or more contacts by checking off the boxes next to the contact names. Once a contact has been selected two additional buttons will appear above the table of contacts: View Contact and Trigger Contacts.

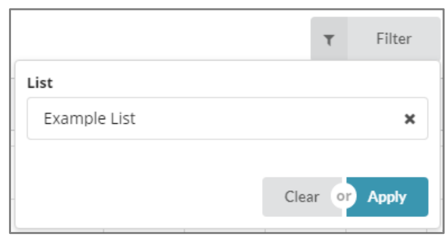
[**Note:** If multiple contacts have been selected, only the blue Trigger Contacts button will become available.]



> The blue View Contact button will direct you to the contact's CRM profile if selected. Refer to the *SimplyCast CRM User Guide* for more information about the CRM and contact profiles.
> The blue Trigger Contacts button will activate the Testing Trigger element and send the chosen contact(s) through the SimplyCast 360 flow when clicked.

- Search for contacts using the search bar at the top of the table or proceed to the next page of contact lists by using the page numbers at the bottom of the table.

- Filter contacts by list by clicking the gray Filter button next to the search bar and select a list from the dropdown menu that appears. Click Apply and the contacts will be filtered according to the chosen list's contents. Clear the filter by clicking the now green Filter button and selecting Clear.

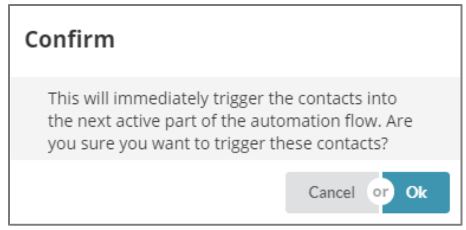


- Sort the contact lists in this table by date created clicking the name of the Created Time column. The lists will be sorted chronologically.

- Check off the Skip all Delays option at the top of the contact table if you want the contacts to pass through the SimplyCast 360 campaign without adhering to any delays that may be in the flow. Each delay will be reduced to 10 minutes or less.

[**Note:** Not checking off this box means that any contacts sent through the campaign using the Testing Trigger will respect all delay settings and won't move on until the set time interval has been reached. For testing purposes it is recommended that the Skip all Delays option be selected.]

- Once you have a contact(s) selected and determined the delay settings, click the blue Trigger Contacts button and a pop-up window will appear asking you to confirm the trigger activation. Click the blue OK button to activate the trigger or Cancel to close the pop-up without sending the contact(s) through the SimplyCast 360 campaign.

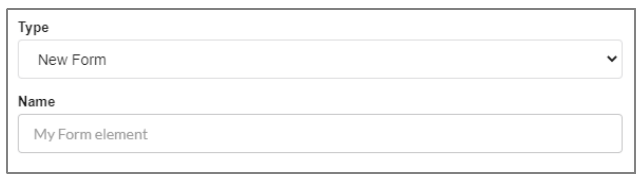


Form

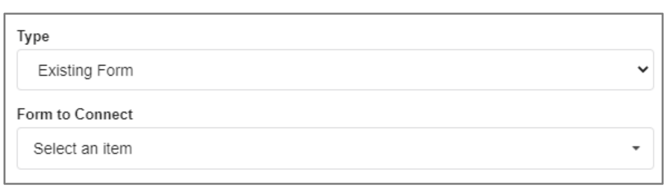
The next drag-and-drop element in the Starting Points tab is the Form element. This element allows you to create a signup form that can be hosted on a website, landing page, or stand alone as a shareable URL. This element is a good option to choose if you are collecting contact information.

To begin setting up this element:

- Click and drag the Form element or double click it to add it to your canvas.
- When you place the element, a sidebar will appear with two fields: Type and Name.
- In the Type field, select from the available dropdown menu whether to create a new signup form for this element or use an existing form in the SimplyCast system.

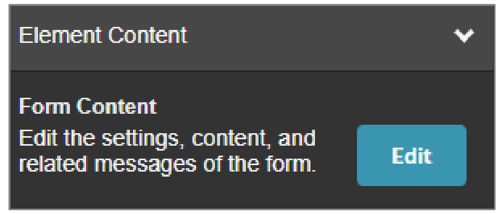


  > To create a new signup form, select this option and enter the name of the new form in the Name field below the Type field.
  > To use an existing signup form (or a survey), choose the Existing Form option in the Type field. The Name field that normally appears below the Type field will be replaced with a new field: Form to Connect. In this dropdown menu you must choose the existing form to attach to the Form element. By typing in the field you can search for your desired form.



- Once you have named your new form or chosen an existing one, click the green Create button to add the element and close the pop-up window. Or, click the gray Close button to close the window without adding a form.

- Once you have placed the element on the canvas and have it selected with your mouse, four additional fields will appear in the Settings Panel on the right-hand side of the screen:



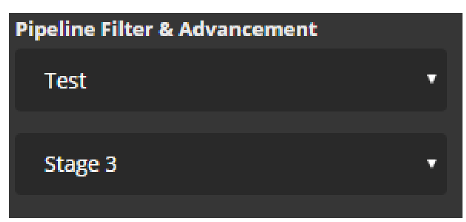
> **Form Content:** Clicking the blue Edit button in the Element Content section will bring you to the Form Builder application, where you can edit the content and settings of the form. Refer to the *SimplyCast Form Builder & Survey User Guide* for more information about creating and editing forms.

> **Name:** This field in the Element Settings section contains the name selected when the element was added to your canvas. By default, the name of the form will be locked. To unlock and change the name of the form, click the blue Unlock button, then edit the name of the form in the textbox provided.

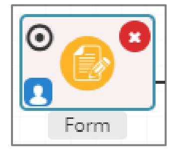
[**Note:** Keep in mind that changing the name of a form changes its name across the entire SimplyCast platform, not just this campaign. For example, one form can be the starting point for multiple SimplyCast 360 campaigns, therefore if it is renamed in one campaign, the new name will also appear in every other campaign it is found in.]

> **Status:** This field is where you can activate or deactivate the element by clicking the blue or red button respectively. Activating an element means that the element will be able to be used as part of the campaign and should perform as expected.

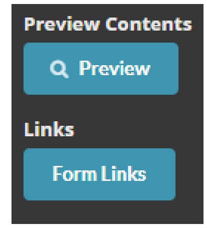
[**Note:** Keep in mind the element will not become active until you save the campaign.]



> **Pipeline Filter & Advancement:** Choose whether you would like contacts to progress through any pipelines you may have associated with the campaign. In the dropdown menu in this field, choose the pipeline you would like contacts to be added to. A second dropdown will appear to choose the stage of that pipeline contacts will be added to at this point of the campaign. If you choose to set a pipeline stage to this element, an icon will appear on the bottom left corner of the element in your campaign to indicate that contacts will move through a pipeline stage at this point in your campaign.

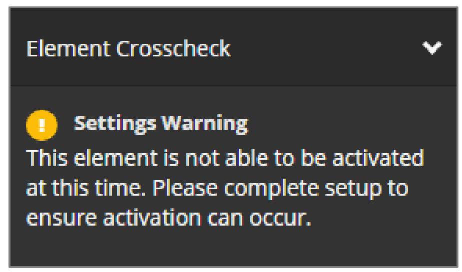


- Once the form has been created and configured, you will see two more fields in the Element Settings section: Preview Contents and Links.



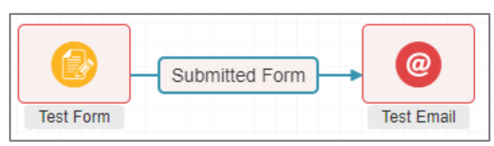
  > **Preview Contents:** Clicking the blue Preview button will open a sidebar with a preview of the form. Click the gray Close button to close the Preview sidebar.

  > **Links:** Clicking the blue Form Links button will open a sidebar containing the URL and code for the form that can be included in emails or embedded on a website. Copy and paste these links as needed. Click the gray Close button to close the Links sidebar. Refer to the next section in this guide for more information about the different links in this sidebar.

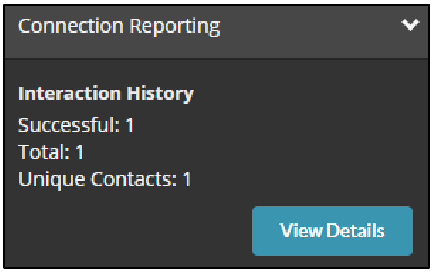


- If there is an issue with the element that needs to be resolved before the element can be activated, there will be a yellow or red exclamation point symbol in the top right corner of the element to signify this. If this is the case, when you select the element with your mouse, an additional section called Element Crosscheck will appear in the Settings Panel. The Element Crosscheck section will describe the issue with the element and provide instructions on how to resolve it.
- To connect your Form element to another element in your campaign, click the black target image at the top right corner of the element and drag it over the element you wish to connect it to.

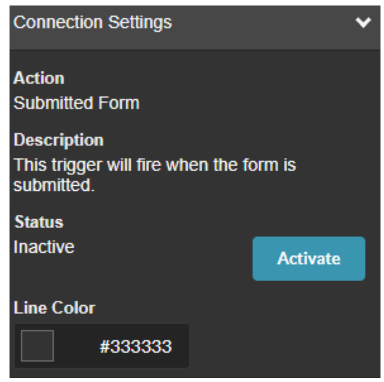
[**Note:** Some elements are not able to be connected to each other. For example, you cannot connect two Starting Point elements to each other, and you cannot connect a Starting Point element to the Contact Changed, Start from CRM, or Inbound API elements.]



- Once a connection has been established between the Form element and at least one other element, a textbox with the connection type will appear on the line: Submitted Form. Click on this textbox to open two new sections on the right-hand side of the screen, Connection Reporting and Connection Settings.



- The Connection Reporting section contains the Interaction History. When you first create the connection, it will only show that there have been no interactions. Once the connection has triggered at least once, you will see more information. Interaction History will then show the number of Successful (and Unsuccessful, if any) triggers, the Total number of triggers, and the number of Unique Contacts who have triggered the trigger.
- The View Details button, when selected, will open the Connection History Sidebar, allowing you to see the history of all the interactions associated with the element. See the section on Interaction History for more information.

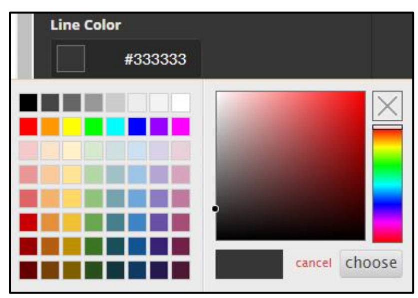


- There are four fields in the Connection Settings section. The first field is the Action field, which indicates the connection type (Submitted Form), meaning someone submitted information using the form.
- The second field is the Description field, which will display a short description of when contacts will pass through the connection.
- The next field is the Status field where you can activate or deactivate the connection by clicking either the blue or red button respectively. Activating a connection means that the connection will be able to be used as part of the campaign and should perform as expected.

[**Note:** Keep in mind the connection will not become active until you save the campaign.]

- The last field is the Line Color field where you can choose the color for that connection's line.

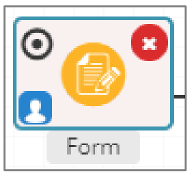
To choose a color:

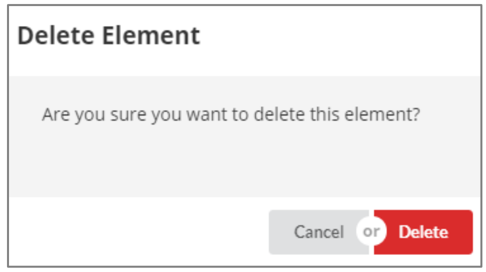


> Click on the color square in the field and a color selector will appear or enter the hex code of the color in the field next to the square.
> Choose your desired color from the pre-set swatches on the left side of the selector dropdown or use the right side to manually choose a color.
> Click the Choose 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.

- To copy a connection, hover your mouse over the textbox appearing on the connection to show a blue button at the top left of the textbox. Copying a connection saves you from having to re-configure the settings for any additional connections requiring the same conditions, saving time. Click and drag this icon to create a new connection that can be attached to a new element. All connection settings configured in the initial connection will be copied over to the new connection.

- Delete a connection by hovering over the connection's textbox and clicking the red "X" button.
- To delete the element from the campaign, hover your mouse over the element and click the red "X" button in the top right corner that appears. A pop-up window will appear asking you to confirm the deletion. Click the red Delete button to complete the deletion or Cancel to close the window without deleting the element.





[**Note:** You will only receive the confirmation pop-up if the element has been activated or if the campaign has been saved.]

Form Links

The form links provide you with a way of sharing your form with users. This information is provided in two ways: URLs and code. The URL provides you with a direct link to your form that you can share with users in emails, on social media, and through other communications. The code provided allows you to embed the form on a webpage.

To obtain the project code for an existing form campaign:

- Locate and click on the blue Form Links button that appears in the Settings Panel once you have set up the form.

Once you have clicked the button, a sidebar will appear with two sections in it:

The Basics

This section in the Links sidebar allows you to do four things:

- Copy the form URL found in the first field and paste it into your browser, which will have the form appear on its own. This link can be used to share the form directly.
- Preview the form by clicking the blue View link located beside the Form URL field.
- Copy the form's code found in the second field of the Links sidebar to paste to the area on your own web page where you want the form to appear.
- Or, choose to copy the iframe (inline frame) code in the third field of the sidebar to paste onto your website.

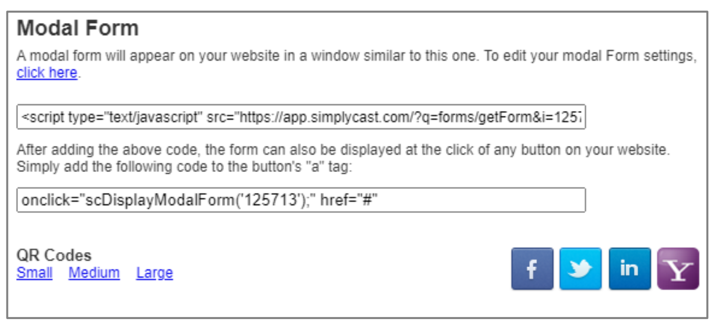
[**Note:** The two code options should only be used by users with knowledge of web design.]

Modal Form

A modal form is essentially a form that appears as a pop-up window on your web page. For more information on modal forms, refer to the Modal Form section in the *SimplyCast Form Builder & Survey User Guide*.

The Modal Form section in the Links sidebar allows you to do five things:

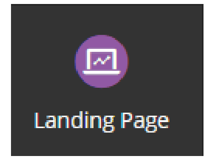
- Edit your modal form settings in the Form Builder by clicking on the blue Click Here link, which will take you to the form configuration page.
- Copy the code found in the first field of the Modal Form section in the sidebar and paste it to your web page to create a modal form.



- Have your modal form open up on your web page at the click of a button by copying the code from the second field in the Modal Form section of the sidebar and adding it to the "<a>" tag of the code from the first field in this section on your page.
- Obtain the QR (quick response barcode) code for your form in three available sizes by clicking on any of the blue hyperlinks for the words Small, Medium, or Large at the bottom of the Modal Form section in the Links sidebar.
- Share your form via Facebook, Twitter, LinkedIn, or Yahoo by clicking on the corresponding icon at the bottom of the Links sidebar.

[**Note:** If you have knowledge of web design, the above options are readily available to you. If not, provide someone with the knowledge with these options and they should be able to assist you with the coding that's required.]

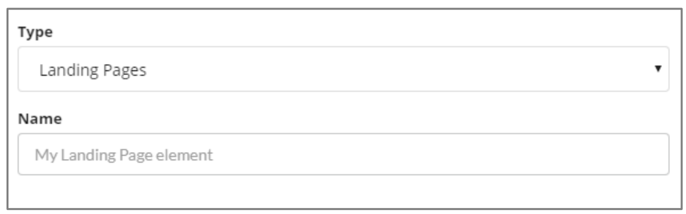
Landing Page



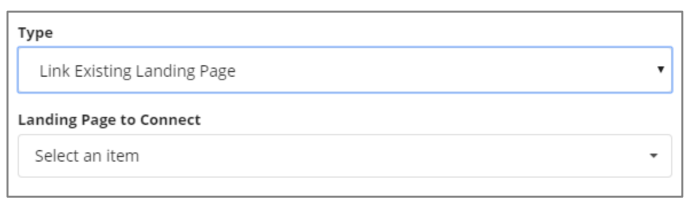
The next drag-and-drop element in the Starting Points tab is the Landing Page element. This element allows you to create a webpage accessible by clicking on a link on a website or in an email and contains a form these visitors can use to sign up for communications or to receive further information.

To begin setting up your landing page:

- Click and drag the Landing Page element or double click it to add it to the canvas.
- When you place the element, a sidebar will appear from the right with two fields: Type and Name.
- In the Type field, select from the available dropdown menu whether to create a new landing page for this element or use an existing landing page in the SimplyCast platform.

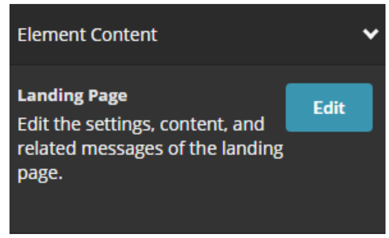


  > To create a new landing page, select the Landing Pages option and enter the name of the new page in the Name field below the Type field.
  > To use an existing landing page, choose the Link Existing Landing Page option in the Type field. The Name field that normally appears below the Type field will be replaced with a new field: Landing Page to Connect. In this dropdown menu, choose the existing landing page to attach to the Landing Page element.



- Once you have named your new landing page or chosen an existing one, click the green Create button to add the element and close the sidebar. Or, click the gray Cancel button to close the sidebar without adding the element.

- Once you have placed the element on your canvas and have it selected with your mouse, four fields will appear in the Settings Panel on the right-hand side of the screen:



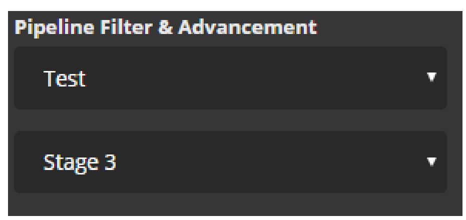
- **Landing Page:** In the Element Content section, there is a blue Edit button across from the Landing Page option, that when clicked, will bring you to the Landing Page application. Here, you can edit the content and settings of the landing page. Refer to the *SimplyCast Landing Page User Guide* for more information about creating and editing landing pages.

- **Name:** This field in the Element Settings section contains the name selected when the element was added to your canvas. By default, the name of the landing page will be locked. To unlock and change the name of the landing page, click the blue Unlock button, then edit the name of the page in the textbox provided.

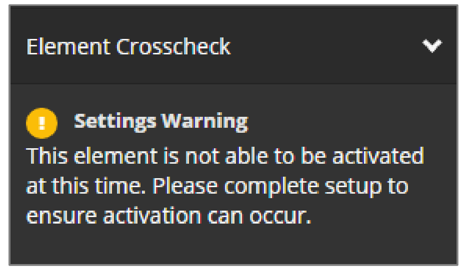
[**Note:** Keep in mind that changing the name of a landing page changes its name across the entire SimplyCast platform, not just this campaign. For example, one landing page can be the starting point for multiple SimplyCast 360 campaigns, therefore if it is renamed in one campaign, the new name will also appear in every other campaign it is found in.]

- **Status:** This field is where you can activate or deactivate the element by clicking the blue or red button respectively. Activating an element means that the element will be able to be used as part of the campaign and should perform as expected.

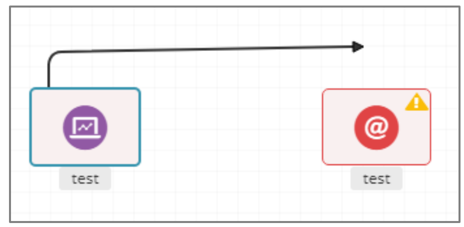
[**Note:** Keep in mind the element will not become active until you save the campaign.]



- **Pipeline Filter & Advancement:** Choose whether you would like contacts to progress through any pipelines you may have associated with the campaign. In the dropdown menu in this field, choose the pipeline you would like contacts to be added to. A second dropdown will appear to choose the stage of that pipeline contacts will be added to at this point of the campaign. If you choose to set a pipeline stage to this element, an icon will appear on the bottom left corner of the element in your campaign to indicate that contacts will move through a pipeline stage at this point in your campaign.



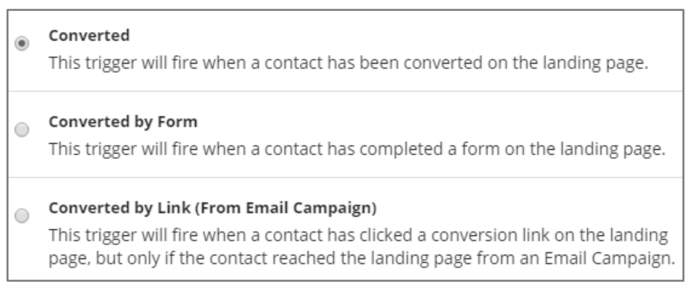
- If there is an issue with the element setup that needs to be resolved before the element can be activated, there will be a yellow or red exclamation point symbol in the top right corner of the element to signify this. If this is the case, when you select the element with your mouse, an additional section called Element Crosscheck will appear in the Settings Panel. The Element Crosscheck section will describe the issue with the element and provide instructions on how to resolve it.



- To connect your Landing Page element to another element in your campaign, click the black target icon located on the top right corner of the element and drag it over the element you wish to connect it to.

[**Note:** Some elements are not able to be connected to each other. For example, you cannot connect two Starting Point elements to each other, and you cannot connect a Starting Point element to the Contact Changed, Start from CRM, or Inbound API elements.]

- A sidebar will appear where you can choose between three connection types:



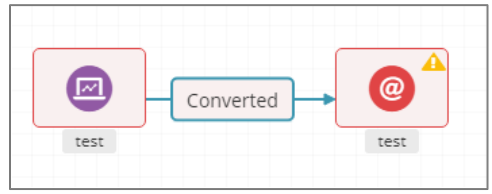
  > **Converted:** This trigger will fire when a contact has been converted on a landing page (link clicks, form submissions, and any other action specified as a conversion event when the landing page is created. Refer to the *SimplyCast Landing Page User Guide* for more information about conversion events.)

  > **Converted by Form:** This trigger will fire when a contact has completed a form on the landing page.

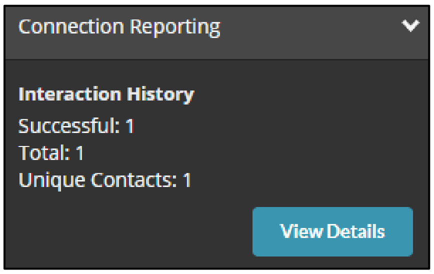
  > **Converted by Link (From Email Campaign):** This trigger will fire when a contact has clicked a conversion link on the landing page if they reached the page via an email.

- Click the green Create button to connect the two elements or the gray Close button to close the sidebar without connecting the two elements.

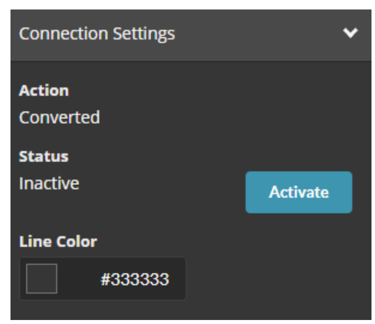
- Once a connection has been established between the Landing Page element and at least one other element, a textbox with the connection type will appear on the line. Click on this textbox to open two newsections in the right-hand side of the screen, Connection Reporting and Connection Settings.



- The Connection Reporting section contains the Interaction History. When you first create the connection, it will only show that there have been no interactions. Once the connection has triggered at least once, you will see more information. Interaction History will then show the number of Successful (and Unsuccessful, if any) triggers, the Total number of triggers, and the number of Unique Contacts who have triggered the trigger.

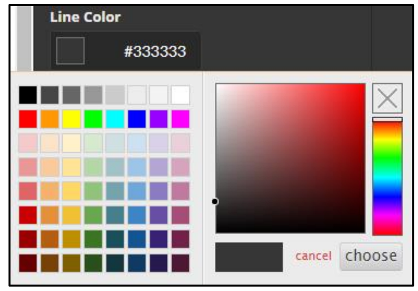


- The View Details button, when selected, will open the Connection History Sidebar, allowing you to see the history of all the interactions associated with the element. See the section on Interaction History for more information.
- There are three fields in the Connection Settings section. The first field is the Action field, which indicates the connection type (Converted, Converted by Form, or Converted by Link).
- The second field is the Description field, which will display a short description of when contacts will pass through the connection.
- The next field is the Status field where you can activate or deactivate the connection by clicking either the blue or red button respectively. Activating a connection means that the connection will be able to be used as part of the campaign and should perform as expected.



[**Note:** Keep in mind the connection will not become active until you save the campaign.]

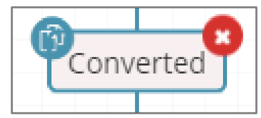
- The last field is the Line Color field where you can choose the color for that connection's line.



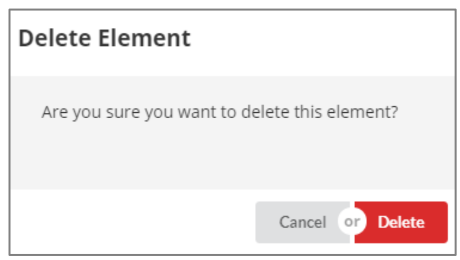
To choose a color:

> 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.
> Choose your desired color from the pre-set swatches on the left side of the selector dropdown or use the right side to manually choose a color.
> 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.

- To copy a connection, hover your mouse over the textbox appearing on the connection to show a blue button at the top left of the textbox. Copying a connection saves you from having to re-configure the settings for any additional connections requiring the same conditions, saving time. Click and drag this button to create a new connection that can be attached to a new element. All connection settings configured in the initial connection will be copied over to the new connection.

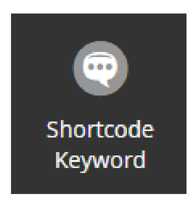


- Delete a connection by hovering over the connection's textbox and clicking the red "X" button.
- To delete the element from the campaign, hover your mouse over the element and click the red "X" button in the top right corner that appears. A pop-up window will appear asking you to confirm the deletion. Click the red Delete button to complete the deletion or Cancel to close the window without deleting the element.



[**Note:** You will only receive the confirmation pop-up if the element has been activated or if the campaign has been saved.]

Shortcode Keyword

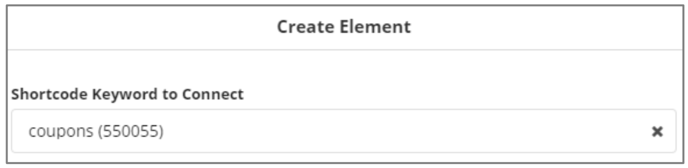


The next drag-and-drop element in the Starting Points tab is the Shortcode Keyword element. This element allows you to use a shortcode keyword to trigger the SimplyCast 360 campaign. A shortcode is a five or six-digit phone number contacts can use to text keywords to, to receive information back. A keyword can be registered to the shortcode and will trigger a set of messages when texted to the shortcode.

[**Note:** You will not see this starting point option unless you have an SMS subscription.]

To begin setting up this element:

- Double-click or click and drag the Shortcode Keyword element onto your canvas.
- When you place the element, a sidebar will appear to select the shortcode keyword to connect to the element. Select one of the keywords associated with your SimplyCast account from the dropdown menu provided.

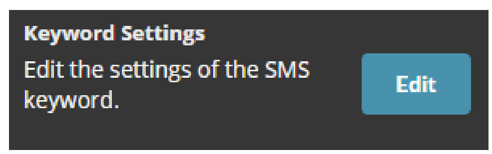


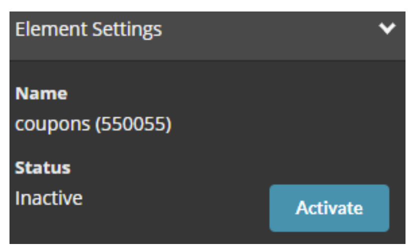
[**Note:** If there are no keyword options in the dropdown menu, this means none have been created in the account yet. Refer to the *SimplyCast SMS User Guide* to learn how to request a keyword.]

- Click the green Create button to create the element and close the sidebar or click the gray Close button to close the sidebar without adding the element.

- Once you have placed the element onto your canvas and have it selected with your mouse, four additional fields will appear in the Settings Panel:

  > **Keyword Settings:** Clicking the Edit button in this field in the Element Content section redirects you to the SMS application, where you can edit the settings for the selected keyword. Refer to the *SimplyCast SMS User Guide* for more information on shortcode keywords.

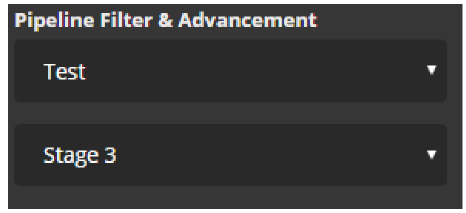




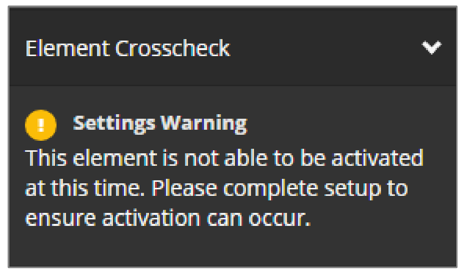
  > **Name:** This field displays the name of the shortcode keyword selected and cannot be edited.

  > **Status:** This field is where you can activate or deactivate the element by clicking the blue or red button respectively. Activating an element means that the element will be able to be used as part of the campaign and should perform as expected.

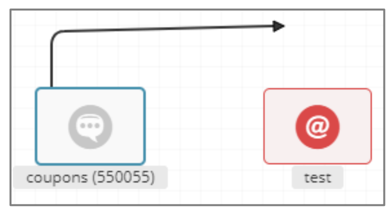
[**Note:** Keep in mind the element will not become active until you save the campaign.]



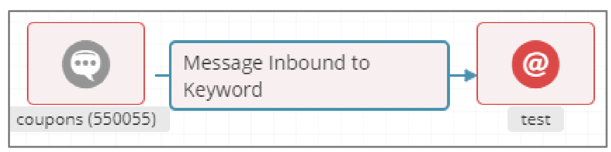
> **Pipeline Filter & Advancement:** Choose whether you would like contacts to progress through any pipelines you may have associated with the campaign. In the dropdown menu in this field, choose the pipeline you would like contacts to be added to. A second dropdown will appear to choose the stage of that pipeline contacts will be added to at this point of the campaign. If you choose to set a pipeline stage to this element, an icon will appear on the bottom left corner of the element in your campaign to indicate that contacts will move through a pipeline stage at this point in your campaign.



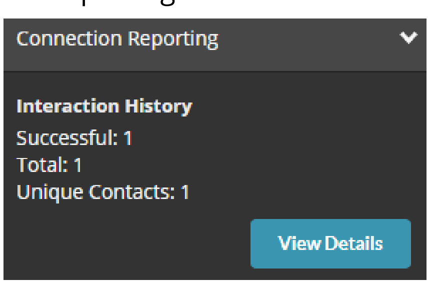
- If there is an issue with the element setup that needs to be resolved before the element can be activated, there will be a yellow or red exclamation point symbol in the top right corner of the element to signify this. If this is the case, when you select the element with your mouse, an additional section called Element Crosscheck will appear in the Settings Panel. The Element Crosscheck section will describe the issue with the element and provide instructions on how to resolve it.



- To connect your Shortcode Keyword element to another element in the campaign, click the black target icon located on the top corner of the element and drag it over to the element you wish to connect it to.

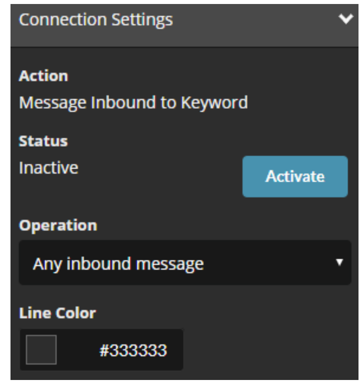


- Once a connection has been established between the Shortcode Keyword element and at least one other element, a textbox with the connection type will appear on the line. Click on this textbox to open two new sections in the Settings Panel, Connection Reporting and Connection Settings.



- The Connection Reporting section contains the Interaction History. When you first create the connection, it will only show that there have been no interactions. Once the connection has triggered at least once, you will see more information. Interaction History will then show the number of Successful (and Unsuccessful, if any) triggers, the Total number of triggers, and the number of Unique Contacts who have triggered the trigger.

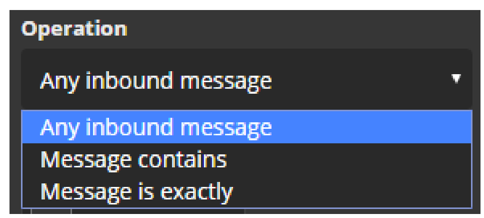
- The View Details button, when selected, will open the Connection History Sidebar, allowing you to see the history of all the interactions associated with the element. See the section on Interaction History for more information.
- There are five fields in the Connection Settings section. The first field is the Action field, which indicates the connection type (Message Inbound to Keyword).



- The second field is the Description field, which will display a short description of when contacts will pass through the connection.
- The next field is the Status field where you can activate or deactivate the connection by clicking the blue or red button respectively. Activating a connection means that the connection will be able to be used as part of the campaign and should perform as expected.

[**Note:** Keep in mind the connection will not become active until you save the campaign.]

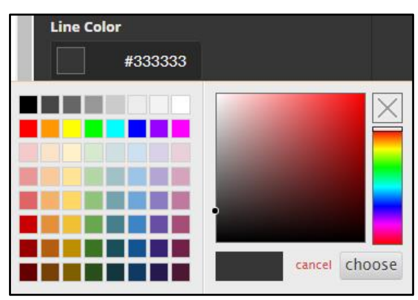
- The next field is the Operation field, where you will select the conditions the inbound message must comply to in order to trigger the connection. Select one of these three options from the dropdown provided:



> **Any inbound message:** Any inbound message, regardless of content, will trigger the connection.
>
> **Message contains:** Selecting this option will open a textbox where you must enter a word or phrase. Inbound messages must contain that word or phrase to trigger the connection.
>
> **Message is exactly:** Selecting this option will open a textbox where you must enter a word or phrase. Only inbound messages containing this exact text will trigger the connection.

- The last field is the Line Color field where you can choose the color for that connection's line.

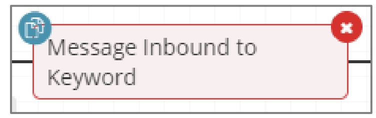
To choose a color:



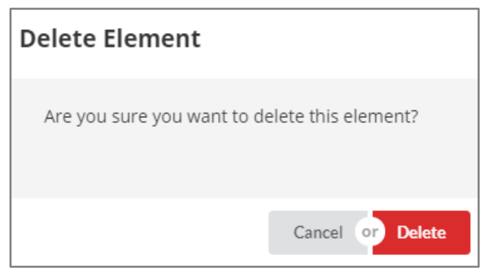
> Click on the color square in the field and a color selector will appear or enter the hex code of the color in the field next to the square.

- Choose your desired color from the pre-set swatches on the left side of the selector dropdown or use the right side to manually choose a color.
- 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.

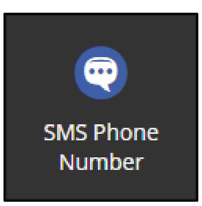
- To copy a connection, hover your mouse over the textbox appearing on the connection to show a blue button at the top left of the textbox. Copying a connection saves you from having to re-configure the settings for any additional connections requiring the same conditions, saving time. Click and drag this button to create a new connection that can be attached to a new element. All connection settings configured in the initial connection will be copied over to the new connection.



- Delete a connection by hovering over the connection's textbox and clicking the red "X" button.
- To delete the element from the campaign, hover your mouse over the element and click the red "X" button in the top right corner that appears. A pop-up window will appear asking you to confirm the deletion. Click the red Delete button to complete the deletion or Cancel to close the window without deleting the element.



[**Note:** You will only receive the confirmation pop-up if the element has been activated or if the campaign has been saved.]



SMS Phone Number

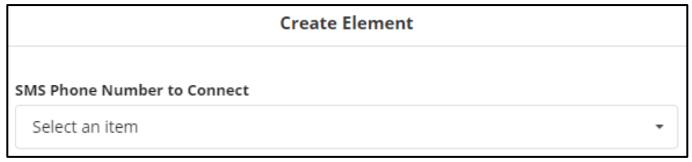
The final drag-and-drop element in the Starting Points tab is the SMS Phone Number element. This element allows you to use an SMS Phone Number associated with your account to trigger the SimplyCast 360 campaign.

[**Note:** You will not see this starting point option unless you have an SMS subscription.]

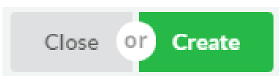
To begin setting up this element:

- Double-click or click and drag the SMS Phone Number element onto your canvas.

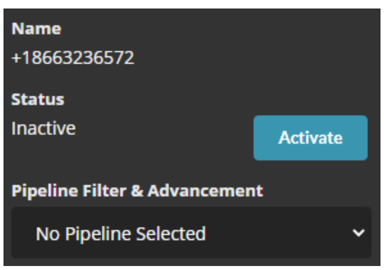
- When you place the element, a sidebar will appear to select the SMS Phone Number to connect to the element. Select one of the keywords associated with your SimplyCast account from the dropdown menu provided.



[**Note:** If there are no SMS Phone Number options in the dropdown menu, this means none have been associated with the account yet. Contact your account manager to request an SMS Phone Number]



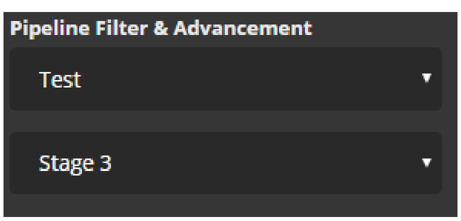
- Click the green Create button to create the element and close the sidebar or click the gray Close button to close the sidebar without adding the element.
- Once you have placed the element onto your canvas and have it selected with your mouse, three additional fields will appear in the Settings Panel:



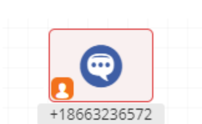
> **Name:** This field displays the SMS Phone Number selected and cannot be edited.

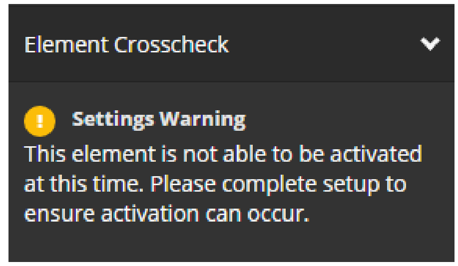
> **Status:** This field is where you can activate or deactivate the element by clicking the blue or red button respectively. Activating an element means that the element will be able to be used as part of the campaign and should perform as expected.

[**Note:** Keep in mind the element will not become active until you save the campaign.]

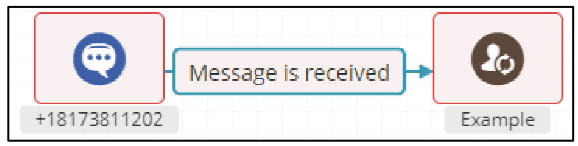


> **Pipeline Filter & Advancement:** Choose whether you would like contacts to progress through any pipelines you may have associated with the campaign. In the dropdown menu in this field, choose the pipeline you would like contacts to be added to. A second dropdown will appear to choose the stage of that pipeline contacts will be added to at this point of the campaign. If you choose to set a pipeline stage to this element, an icon will appear on the bottom left corner of the element in your campaign to indicate that contacts will move through a pipeline stage at this point in your campaign.

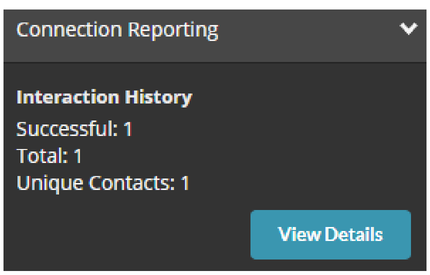




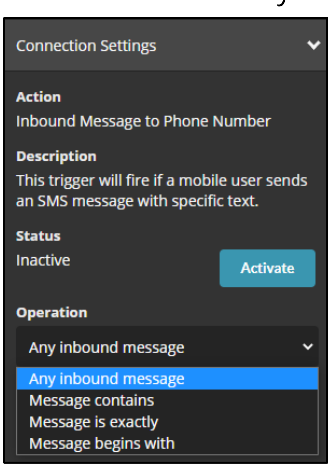
- If there is an issue with the element setup that needs to be resolved before the element can be activated, there will be a yellow or red exclamation point symbol in the top right corner of the element to signify this. If this is the case, when you select the element with your mouse, an additional section called Element Crosscheck will appear in the Settings Panel. The Element Crosscheck section will describe the issue with the element and provide instructions on how to resolve it.
- To connect your SMS Phone Number element to another element in the campaign, click the black target icon located on the top corner of the element and drag it over to the element you wish to connect it to.



- Once a connection has been established between the SMS Phone Number element and at least one other element, a textbox with the connection type will appear on the line. Click on this textbox to open two new sections in the Settings Panel, Connection Reporting and Connection Settings.



- The Connection Reporting section contains the Interaction History. When you first create the connection, it will only show that there have been no interactions. Once the connection has triggered at least once, you will see more information. Interaction History will then show the number of Successful (and Unsuccessful, if any) triggers, the Total number of triggers, and the number of Unique Contacts who have triggered the trigger.
- The View Details button, when selected, will open the Connection History Sidebar, allowing you to see the history of all the interactions associated with the element. See the section on Interaction History for more information.

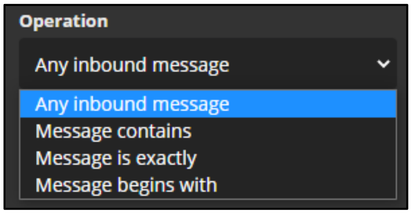


•There are up to five fields in the Connection Settings section. The first field is the Action field, which indicates the connection type (Message Inbound to Phone Number).

•The second field is the Description field, which will display a short description of when contacts will pass through the connection.

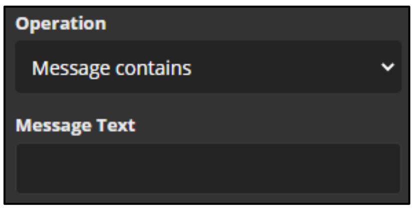
•The next field is the Status field where you can activate or deactivate the connection by clicking the blue or red button respectively. Activating a connection means that the connection will be able to be used as part of the campaign and should perform as expected.

[**Note:** Keep in mind the connection will not become active until you save the campaign.]



• The next field is the Operation field, where you will select the conditions the inbound message must comply to in order to trigger the connection. Select one of these four options from the dropdown provided:

> **Any inbound message:** Any inbound message, regardless of content, will trigger the connection.

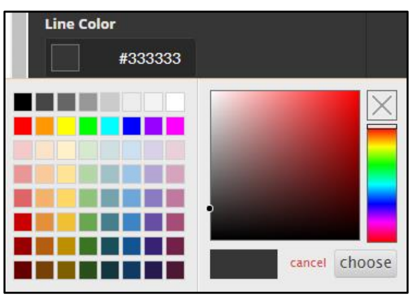


> **Message contains:** Selecting this option will open a textbox where you must enter a word or phrase. Inbound messages must contain that word or phrase to trigger the connection.

> **Message is exactly:** Selecting this option will open a textbox where you must enter a word or phrase. Only inbound messages containing this exact text will trigger the connection.

> **Message begins with:** Selecting this option will open a textbox where you must enter a word or phrase. Inbound messages must begin with that word or phrase to trigger the connection.

- The last field is the Line Color field where you can choose the color for that connection's line.

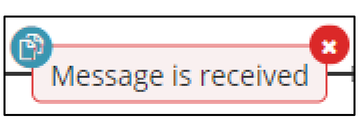


To choose a color:

> 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.

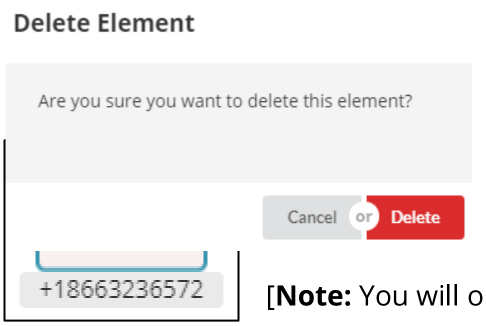
> Choose your desired color from the pre-set swatches on the left side of the selector dropdown or use the right side to manually choose a color.

> 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.



- To copy a connection, hover your mouse over the textbox appearing on the connection to show a blue button at the top left of the textbox. Copying a connection saves you from having to re-configure the settings for any additional connections requiring the same conditions, saving time. Click and drag this button to create a new connection that can be attached to a new element. All connection settings configured in the initial connection will be copied over to the new connection.

- Delete a connection by hovering over the connection's textbox and clicking the red "X" button.

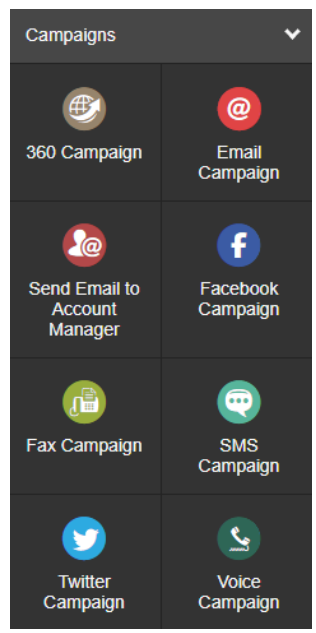


- To delete the element from the campaign, hover your mouse over the element and click the red "X" button in the top right corner that appears. A pop-up window will appear asking you to confirm the deletion. Click the red Delete button to complete the deletion or Cancel to close the window without deleting the element.

[**Note:** You will only receive the confirmation pop-up if the element has been activated or if the campaign has been saved.]

Campaigns

The next tab in the Creation Panel on the left side of the screen is the Campaigns tab. The elements appearing in this tab are different types of communication channels that you are able to use to send messages out to your contacts.



These are:

- **360 Campaign:** This element allows you to link another SimplyCast 360 campaign to the current campaign, meaning you can funnel all your contacts from one project into another without having to build out the entire campaign again if you have it already set up in the other project.

[**Note:** The 360 Campaign element can be used as a starting or end point in the campaign by either pulling contacts from or pushing them to another 360 campaign.]

- **Email Campaign:** This element allows you to create and send an email to your contacts when they reach a particular point in the campaign.
- **Send Email to Account Manager:** This element allows you to create and send an email to the contact's account manager. Or a pre-determined account manager when they reach a particular point in the campaign.

- **Facebook Campaign:** This element allows you to add a Facebook campaign to the SimplyCast 360, which can be triggered to start after a selected action in the campaign.
- **Fax Campaign:** This element allows you to create and send a fax to your contacts when they reach a particular point in the campaign.
- **SMS Campaign:** This element allows you to create and send an SMS message to your contacts when they reach a particular point in the campaign.
- **Twitter Campaign:** This element allows you to add a Twitter campaign to the campaign, which can be triggered by a selected action within the campaign.
- **Voice Campaign:** This element allows you to create and send a voice message to your contacts when they reach a particular point in the campaign.

360 Campaign

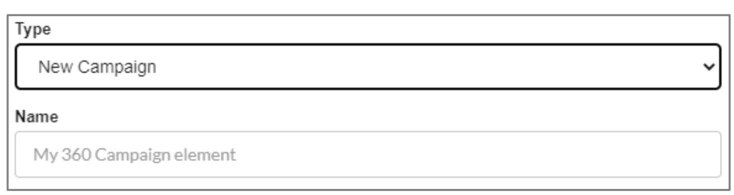
The first drag-and-drop element in the Campaigns tab is the 360 Campaign Element. This element allows you to link another SimplyCast 360 campaign to the current campaign, meaning you can funnel all your contacts from one project into another without having to build out the entire campaign again if you have it already set up in the other project.

To begin setting up this element:

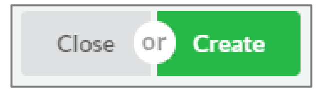
- Click and drag the 360 Campaign or double click to add the element to your canvas.
- When you place the element, a sidebar will appear with two fields. The first field will ask you to choose whether you want to create a new SimplyCast 360 campaign to associate with this element or use an existing SimplyCast 360 campaign.

  > If you choose to use an existing SimplyCast 360 campaign, a second field will appear where you are asked to select the campaign you want to associate with this element from the dropdown menu provided.

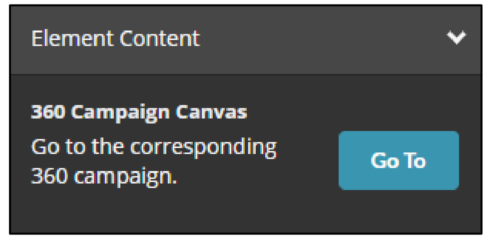
  > If you choose to create a new SimplyCast 360 campaign, the second field will ask you to name the new SimplyCast 360 campaign. Type the name into the textbox provided.



- Click the green Create button to create the element and close the sidebar. Or, click the gray Cancel button to close the sidebar without creating a SimplyCast 360 campaign.

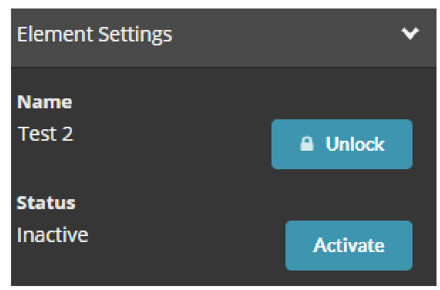


- Once you have placed the element onto your canvas and have it selected with your mouse, four additional fields will appear in the Settings Panel:



> **360 Campaign Canvas**: In the Element Content section, clicking the blue "Go To" button in this field redirects you to the Automation Flow Editor for the SimplyCast 360 campaign, where you can build and edit that campaign as desired.

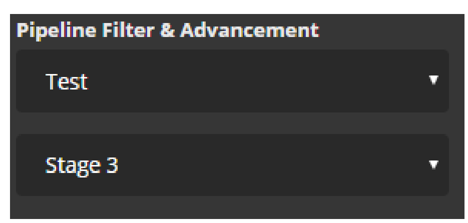
> **Name:** This field contains the name you selected when you added the element to your Canvas. By default, the name of the SimplyCast 360 campaign will be locked. To unlock and change the name of the SimplyCast 360 campaign, click the blue Unlock button, then edit the name of the element in the textbox provided.



[**Note:** Keep in mind that changing the name of a 360 campaign changes its name across the entire SimplyCast platform, not just this campaign. For example, a SimplyCast 360 campaign can be linked on multiple SimplyCast 360 canvases, therefore if it is renamed in one campaign, the new name will also appear in every other campaign it is found in.]

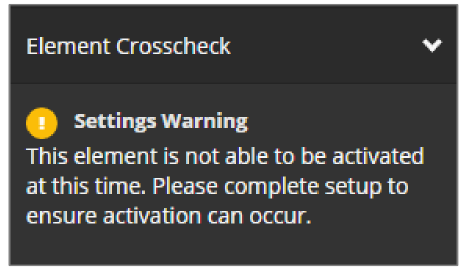
> **Status:** This field is where you can activate or deactivate the element by clicking the blue or red button respectively. Activating an element means that the element will be able to be used as part of the campaign and should perform as expected.

[**Note:** Keep in mind the element will not become active until you save the campaign.]

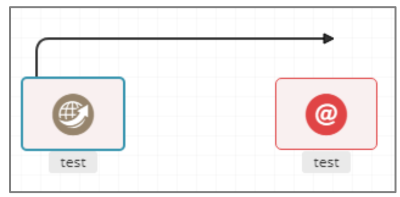


> **Pipeline Filter & Advancement:** Choose whether you would like contacts to progress through any pipelines you may have associated with the campaign. In the dropdown menu in this field, choose the pipeline you would like contacts to be added to. A second dropdown will appear to choose the stage of that pipeline contacts will be added to at this point of the campaign. If you choose to set a pipeline stage to this element, an icon will appear on the bottom left

corner of the element in your campaign to indicate that contacts will move through a pipeline stage at this point in your campaign.

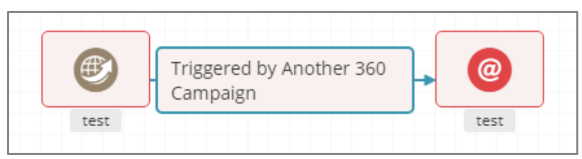


- If there is an issue with the element setup that needs to be resolved before the element can be activated, there will be a yellow or red exclamation point symbol in the top right corner of the element to signify this. If this is the case, when you select the element with your mouse, an additional section called Element Crosscheck will appear in the Settings Panel. The Element Crosscheck section will describe the issue with the element and provide instructions on how to resolve it.
- To connect your SimplyCast 360 element to another element in the campaign, click the black target icon on the top corner of the element and drag it over to the element you wish to connect it to.

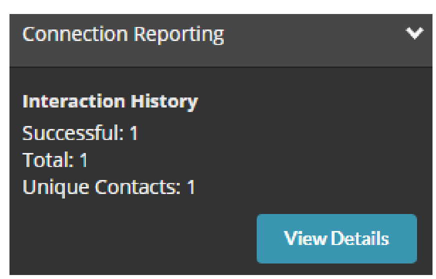


[**Note:** Some elements are not able to be connected to each other. For example, you cannot connect two Starting Point elements to each other, and you cannot connect a Starting Point element to the Contact Changed, Start from CRM, or Inbound API elements.]

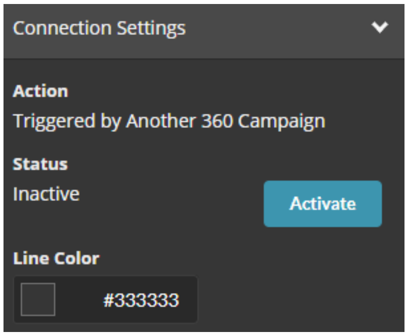
[**Note:** For this element to function, each SimplyCast 360 campaign must have a 360 Campaign element for the other in their respective canvases. When a contact reaches the 360 Campaign element in the first campaign, they will be automatically triggered to enter into the second SimplyCast 360 campaign. This trigger will occur up to once an hour.]



- Once a connection has been established between the 360 Campaign element and at least one other element, a textbox with the connection type will appear on the line. Click on this textbox to open two new sections in the Settings Panel, Connection Reporting and Connection Settings.
- The Connection Reporting section contains the Interaction History. When you first create the connection, it will only show that there have been no interactions. Once the connection has triggered at least once, you will see more information. Interaction History will then show the number of Successful (and Unsuccessful, if any) triggers, the Total number of triggers, and the number of Unique Contacts who have triggered the trigger.



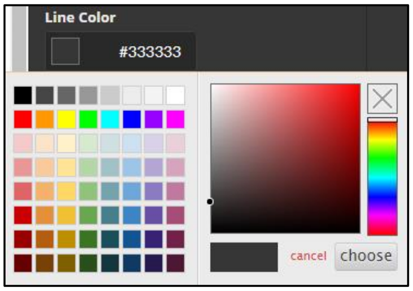
- The View Details button, when selected, will open the Connection History Sidebar, allowing you to see the history of all the interactions associated with the element. See the section on Interaction History for more information.
- There are four fields in the Connection Settings section. The first field is the Action field, which indicates the connection type (Triggered by Another 360 Campaign).



- The second field is the Description field which will display a short description for when the connection will be triggered.
- The next field is the Status field where you can activate or deactivate the connection by clicking the blue or red button respectively. Activating a connection means that the connection will be able to be used as part of the campaign and should perform as expected.

[**Note:** Keep in mind the connection will not become active until you save the campaign.]

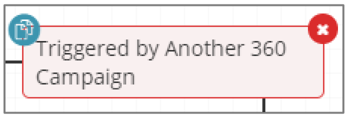
- The last field is the Line Color field where you can choose the color for that connection's line.



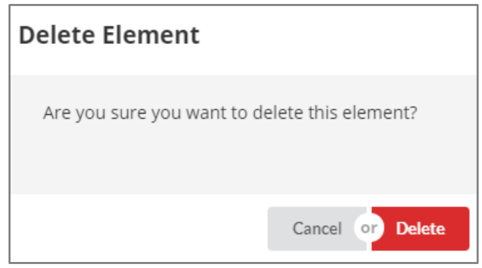
To choose a color:

> 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.
> Choose your desired color from the pre-set swatches on the left side of the selector dropdown or use the right side to manually choose a color.
> 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.

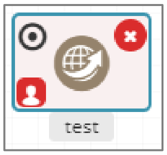
- To copy a connection, hover your mouse over the textbox appearing on the connection to show a blue button at the top left of the textbox. Copying a connection saves you from having to re-configure the settings for any additional connections requiring the same conditions, saving time. Click and drag this button to create a new connection that can be attached to a new element. All connection settings configured in the initial connection will be copied over to the new connection.



- Delete a connection by hovering over the connection's textbox and clicking the red "X" button.

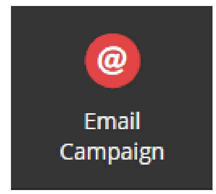


- To delete the element from the campaign, hover your mouse over the element and click the red "X" button in the top right corner that appears. A pop-up window will appear asking you to confirm the deletion. Click the red Delete button to complete the deletion or Cancel to close the window without deleting the element.



[**Note:** You will only receive the confirmation pop-up if the element has been activated or if the campaign has been saved.]

Email Campaign



The second drag-and-drop element in the Campaigns tab is the Email Campaign Element. This element allows you to create and send an email to your contacts when they reach a particular point in the campaign.

To begin setting up this element:

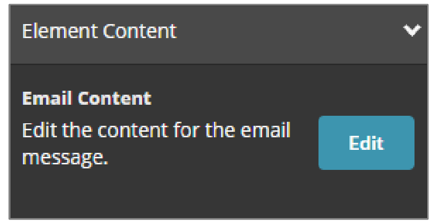
- Click and drag the Email element or double click to add it to your canvas.
- When you place the element, a sidebar will appear with two fields. The first field will ask you to choose the type of email to create from the dropdown menu in the Type field:

  > **New Campaign:** An email campaign created using the simple Email Composer: using drag-and-drop elements to create the email.

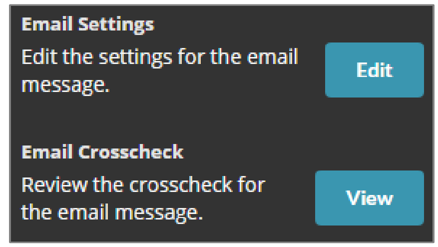
  > **Copy Campaign:** An email campaign created by copying an existing project. Choosing this option will create another field in the pop-up window where you must select the existing email campaign you would like to copy from the dropdown list.

- The second field will ask you to enter a name for the new Email element. Enter a name into the field provided.
- Click the green Create button to create the element and close the sidebar. Or, click the gray Cancel button to close the sidebar without adding an Email Campaign element.

- Once you have placed the element onto your canvas and have it selected with your mouse, six additional fields will appear in the Settings Panel on the right-hand side of the screen:

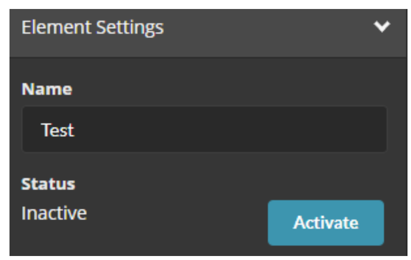


> **Email Content:** Clicking the blue Edit button in the Element Content section will bring you to the Email application, where you can design, create, and edit the content of the email. Refer to the *SimplyCast New Email Editor User Guide* for more information about creating and editing email campaigns.



> **Email Settings:** Clicking the blue Edit button in the Element Settings section will bring you directly to the settings section in the Email Editor, where you can configure the sending settings of the email. Refer to the *SimplyCast New Email Editor User Guide* for more information about editing email campaigns.

> **Email Crosscheck:** Clicking the blue View button in the Element Crosscheck section will bring you directly to the Email campaign's review page, where you can review the crosscheck for the email. Refer to the *SimplyCast New Email Editor User Guide* for more information about email campaigns.

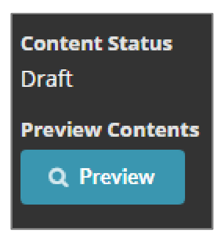


> **Name:** This field contains the name you selected when you added the element to your canvas. To change the name of your element, edit the name in the textbox provided.

> **Status:** This field is where you can activate or deactivate the element by clicking the blue or red button respectively. Activating an element means that the element will be able to be used as part of the campaign and should perform as expected.

[**Note:** Keep in mind the element will not become active until you save the campaign.]

> **Content Status:** Once you have saved the SimplyCast 360 campaign after adding the Email element, you will see the Content Status field in the Settings Panel below the Status field. This field will provide you with the current state of the email campaign's content depending on how far you have progressed through the setup process (e.g. Draft, Pending Approval, etc.).

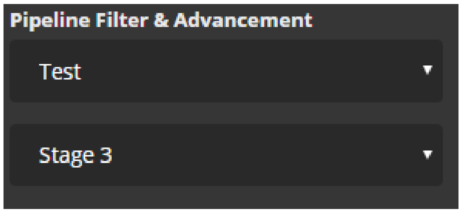


> **Preview Contents:** Once you have saved the SimplyCast 360 campaign after adding the Email element, you will be able to preview the content of the email by clicking the blue Preview button appearing in this field. A sidebar will open where you are able to view the email content (if any has been added) as well as view a merged preview of the email that will show you how any added merge tags will appear once the email is sent. Click the Close

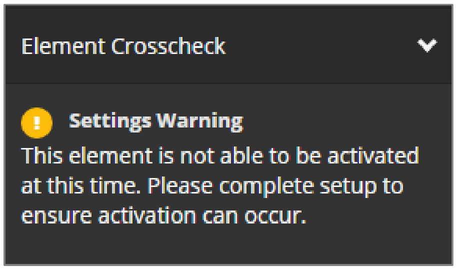
button at the bottom of the sidebar to close the window and return to the SimplyCast 360 campaign.

> **Subject Line:** Once you have finished the email campaign setup, the Subject Line field will appear in the Settings Panel below the blue Preview Contents button, containing the subject line you have included in the email setup.

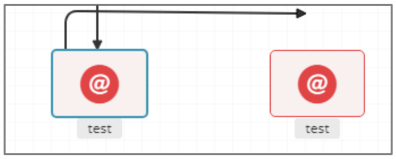
> **Pipeline Filter & Advancement:** Choose whether you would like contacts to progress through any pipelines you may have associated with the campaign. In the dropdown menu in this field, choose the pipeline you would like contacts to be added to. A second dropdown will appear to choose the stage of that pipeline contacts will be added to at this point of the campaign. If you choose to set a pipeline stage to this element, an icon will appear on the bottom left corner of the element in your campaign to indicate that contacts will move through a pipeline stage at this point in your campaign.



- If there is an issue with the element setup that needs to be resolved before the element can be activated, there will be a yellow or red exclamation point symbol in the top right corner of the element to signify this. If this is the case, when you select the element with your mouse, an additional section called Element Crosscheck will appear in the Settings Panel. The Element Crosscheck section will describe the issue with the element and provide instructions on how to resolve it.



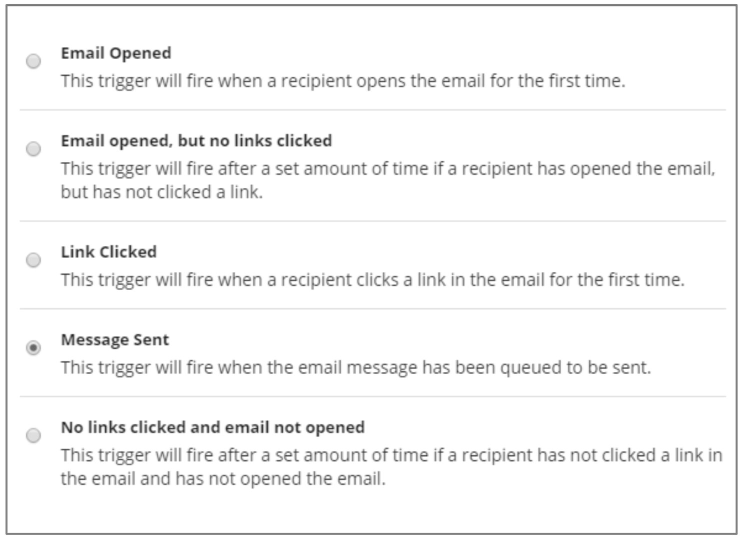
- To connect your Email element to another element in your campaign, click the black target icon on the top corner of the element and drag it over to the element you wish to connect it to.



[**Note:** Some elements are not able to be connected to each other. For example, you cannot connect two Starting Point elements to each other, and you cannot connect a Starting Point element to the Contact Changed, Start from CRM, or Inbound API elements.]

- A sidebar will appear where you can choose between five connection types:

> **Email Opened:** This means the campaign will continue through the connection when a recipient opens the email for the first time.



> **Email Opened, But No Links Clicked:** This means the campaign will continue through the connection after a set amount of time if a recipient has opened the email but has not clicked any links in it.

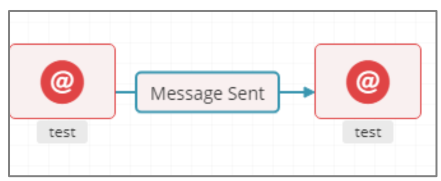
> **Link Clicked:** This means the campaign will continue through the connection when a recipient clicks a link (or a specific link) in the email for the first time.

> **Message Sent:** This means the campaign will continue through the connection when the email message has been queued to be sent.

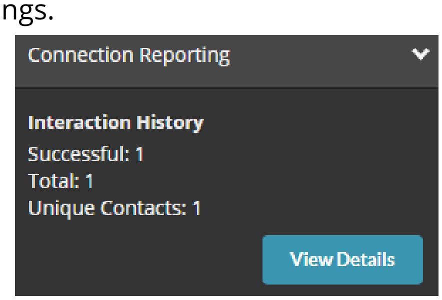
> **No Links Clicked and Email Not Opened:** This means the campaign will continue through the connection after a set amount of time if a recipient has not clicked a link in the email and has not opened the email.

- Click the green Create button to connect the two elements or the gray Close button to close the sidebar without connecting the two elements.

- Once a connection has been established between the Email element and at least one other element, a textbox with the connection type will appear on the line.

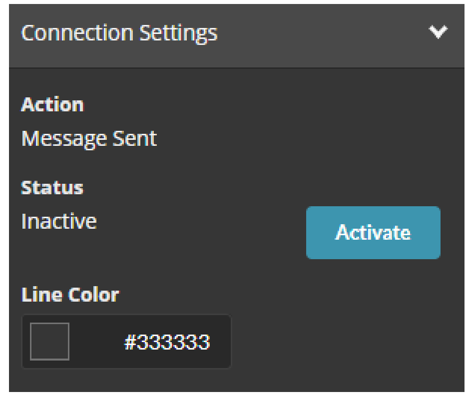


- Click on this textbox to open two new sections in the Settings Panel, Connection Reporting and Connection Settings.
- The Connection Reporting section contains the Interaction History. When you first create the connection, it will only show that there have been no interactions. Once the connection has triggered at least once, you will see more information. Interaction History will then show the number of Successful (and Unsuccessful, if any) triggers, the Total number of triggers, and the number of Unique Contacts who have triggered the trigger.



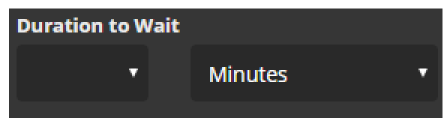
- The View Details button, when selected, will open the Connection History Sidebar, allowing you to see the history of all the interactions associated with the element. See the section on Interaction History for more information.

- Depending on the connection option you choose, there will be either four or five fields in the Connection Settings section. The first field is the Action field, which indicates the connection type selected (Email Opened; Email Opened, But No Links Clicked; Link Clicked; Message Sent; or No Links Clicked and Email Not Opened).

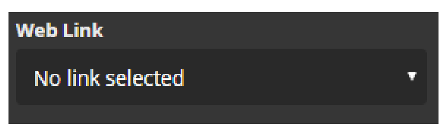


- The second field is the Description field which will display a short description for when the connection will be triggered.
- The next field is the Status field where you can activate or deactivate the connection by clicking the blue or red button respectively. Activating a connection means that the connection will be able to be used as part of the campaign and should perform as expected.

[**Note:** Keep in mind the connection will not become active until you save the campaign.]

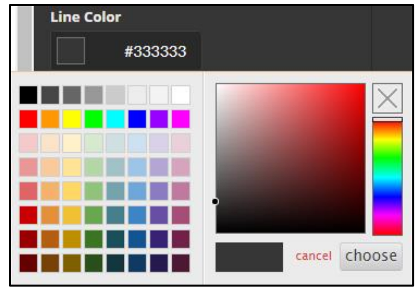


- If you chose the "Email Opened, But No Links Clicked" or "No Links Clicked and Email Not Opened" option, the next field will be Duration to Wait. This is where you decide how long the system will wait for the email recipient to either open the email or click the link before triggering the connection. There are two dropdowns in this field, one where you choose a unit of time (minutes, hours, or days) and another where you choose the number of that time unit you want to wait. So, if you select "5" in the first dropdown and "Days" in the second dropdown, the system will wait five days for a recipient to open the email or click a link before firing the trigger.



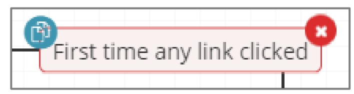
- If you chose the "Link Clicked" option, the next field will be Web Link. This is where you will select the link the recipient must click in order to fire the trigger. Only the links present in the current email will be available to choose from. Select the link to connect with this trigger from the dropdown menu provided. Alternatively, you can select "Any link clicked" from the dropdown, which means the trigger will fire if any link in the email is clicked; this trigger will only fire once.
- The final field is the Line Color field where you can choose the color for that connection's line.

To choose a color:

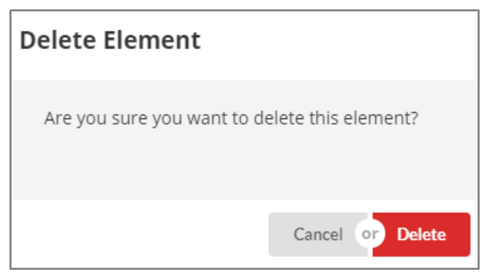


> Click on the color square in the field and a color selector will appear or enter the hex code of the color in the field next to the square.
> Choose your desired color from the pre-set swatches on the left side of the selector dropdown or use the right side to manually choose a color.
> Click the Choose 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.

- To copy a connection, hover your mouse over the textbox appearing on the connection to show a blue button at the top left of the textbox. Copying a connection saves you from having to re-configure the settings for any additional connections requiring the same conditions, saving time. Click and drag this button to create a new connection that can be attached to a new element. All connection settings configured in the initial connection will be copied over to the new connection.

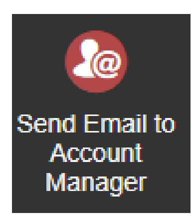


- Delete a connection by hovering over the connection's textbox and clicking the red "X" button.
- To delete the element from the campaign, hover your mouse over the element and click the red "X" button in the top right corner that appears. A pop-up window will appear asking you to confirm the deletion. Click the red Delete button to complete the deletion or Cancel to close the window without deleting the element.



[**Note:** You will only receive the confirmation pop-up if the element has been activated or if the campaign has been saved.]

Send Email to Account Manager Campaign



The third drag-and-drop element in the Campaigns tab is the Email Campaign Element. This element allows you to create and send an email to your contacts when they reach a particular point in the campaign.

To begin setting up this element:

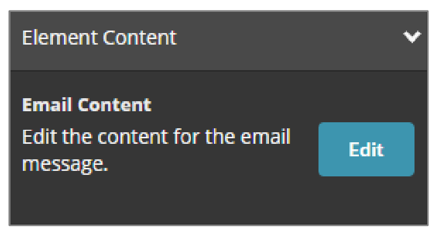
- Click and drag the Email element or double click to add it to your canvas.
- When you place the element, a sidebar will appear with two fields. The first field will ask you to choose the type of email to create from the dropdown menu in the Type field:

    - **New Campaign:** An email campaign created using the simple Email Composer: using drag-and-drop elements to create the email.
    - **Copy Campaign:** An email campaign created by copying an existing project. Choosing this option will create another field in the pop-up window where you must select the existing email campaign you would like to copy from the dropdown list.

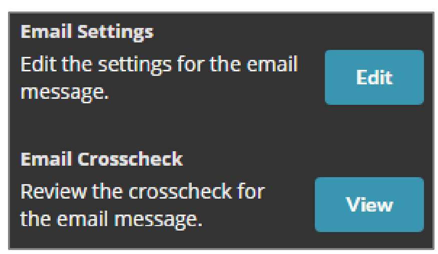
- The second field will ask you to enter a name for the new Email element. Enter a name into the field provided.
- Click the green Create button to create the element and close the sidebar. Or, click the gray Cancel button to close the sidebar without adding an Email Campaign element.

- Once you have placed the element onto your canvas and have it selected with your mouse, six additional fields will appear in the Settings Panel on the right-hand side of the screen:

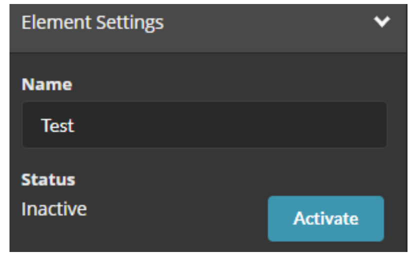
    - **Email Content:** Clicking the blue Edit button in the Element Content section will bring you to the Email application, where you can design, create, and edit the content of the email. Refer to the *SimplyCast New Email Editor User Guide* for more information about creating and editing email campaigns.



    - **Email Settings:** Clicking the blue Edit button in the Element Settings section will bring you directly to the settings section in the Email Editor, where you can configure the sending settings of the email. Refer to the *SimplyCast New Email Editor User Guide* and the next section in this guide for more information about editing the settings for email campaigns.

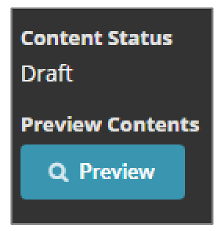


    - **Email Crosscheck:** Clicking the blue View button in the Element Crosscheck section will bring you directly to the Email campaign's review page, where you can review the crosscheck for the email. Refer to the *SimplyCast New Email Editor User Guide* for more information about email campaigns.

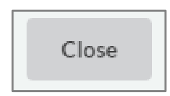


- **Name:** This field contains the name you selected when you added the element to your canvas. To change the name of your element, edit the name in the textbox provided.
- **Status:** This field is where you can activate or deactivate the element by clicking the blue or red button respectively. Activating an element means that the element will be able to be used as part of the campaign and should perform as expected.

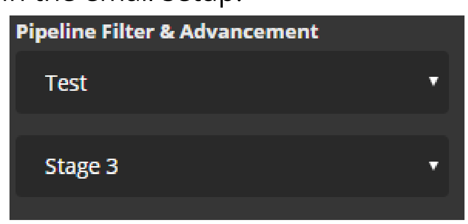
[**Note:** Keep in mind the element will not become active until you save the campaign.]



- **Content Status:** Once you have saved the SimplyCast 360 campaign after adding the Email element, you will see the Content Status field in the Settings Panel below the Status field. This field will provide you with the current state of the email campaign's content depending on how far you have progressed through the setup process (e.g. Draft, Pending Approval, etc.).
- **Preview Contents:** Once you have saved the SimplyCast 360 campaign after adding the Email element, you will be able to preview the content of the email by clicking the blue Preview button appearing in this field. A sidebar will open where you are able to view the email content (if any has been added).Click the Close button at the bottom of the sidebar to close the window and return to the SimplyCast 360 campaign.

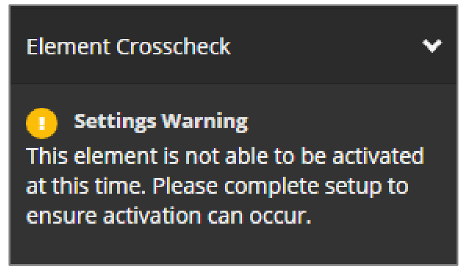


- **Subject Line:** Once you have finished the email campaign setup, the Subject Line field will appear in the Settings Panel below the blue Preview Contents button, containing the subject line you have included in the email setup.

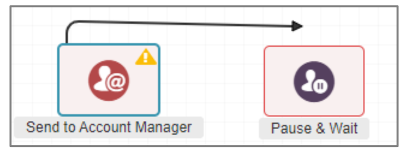


- **Pipeline Filter & Advancement:** Choose whether you would like contacts to progress through any pipelines you may have associated with the campaign. In the dropdown menu in this field, choose the pipeline you would like contacts to be added to. A second dropdown will appear to choose the stage of that pipeline contacts will be added to at this point of the campaign. If you choose to set a pipeline stage to this element, an icon will appear on the bottom left corner of the element in your campaign to indicate that contacts will move through a pipeline stage at this point in your campaign.

- If there is an issue with the element setup that needs to be resolved before the element can be activated, there will be a yellow or red exclamation point symbol in the top right corner of the element to signify this. If this is the case, when you select the element with your mouse, an additional section called Element Crosscheck will appear in the Settings Panel. The Element Crosscheck section will describe the issue with the element and provide instructions on how to resolve it.



- To connect your Email element to another element in your campaign, click the black target icon on the top corner of the element and drag it over to the element you wish to connect it to.

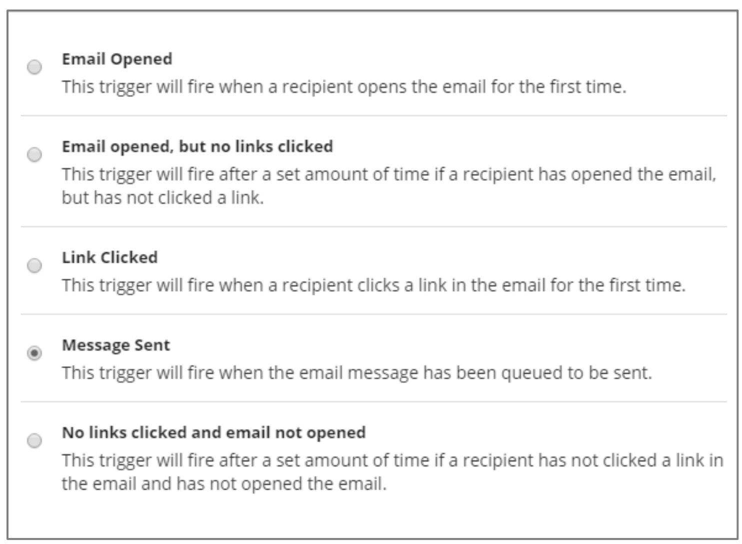


[**Note:** Some elements are not able to be connected to each other. For example, you cannot connect two Starting Point elements to each other, and you cannot connect a Starting Point element to the Contact Changed, Start from CRM, or Inbound API elements.]

- A sidebar will appear where you can choose between five connection types:

    > **Email Opened:** This means the campaign will continue through the connection when a recipient opens the email for the first time.

    > **Email Opened, But No Links Clicked:** This means the campaign will continue through the connection after a set amount of time if a recipient has opened the email but has not clicked any links in it.

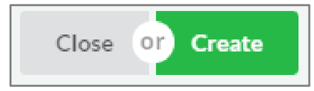


    > **Link Clicked:** This means the campaign will continue through the connection when a recipient clicks a link (or a specific link) in the email for the first time.

    > **Message Sent:** This means the campaign will continue through the connection when the email message has been queued to be sent.

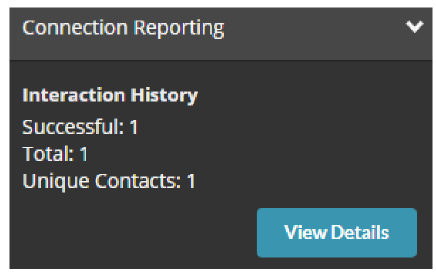
> **No Links Clicked and Email Not Opened:** This means the campaign will continue through the connection after a set amount of time if a recipient has not clicked a link in the email and has not opened the email.

- Click the green Create button to connect the two elements or the gray Close button to close the sidebar without connecting the two elements.

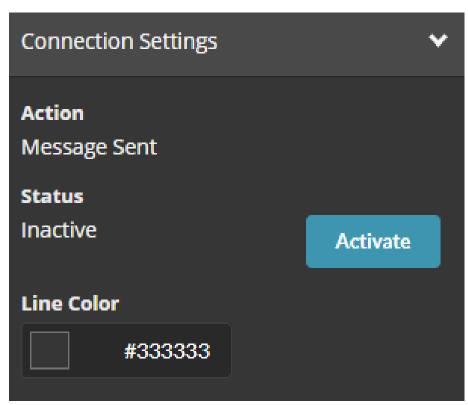


- Once a connection has been established between the Email element and at least one other element, a textbox with the connection type will appear on the line.

- Click on this textbox to open two new sections in the Settings Panel, Connection Reporting and Connection Settings.
- The Connection Reporting section contains the Interaction History. When you first create the connection, it will only show that there have been no interactions. Once the connection has triggered at least once, you will see more information. Interaction History will then show the number of Successful (and Unsuccessful, if any) triggers, the Total number of triggers, and the number of Unique Contacts who have triggered the trigger.

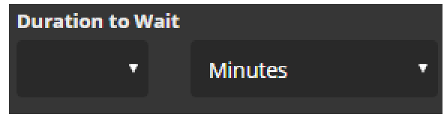


- The View Details button, when selected, will open the Connection History Sidebar, allowing you to see the history of all the interactions associated with the element. See the section on Interaction History for more information.
- Depending on the connection option you choose, there will be either four or five fields in the Connection Settings section. The first field is the Action field, which indicates the connection type selected (Email Opened; Email Opened, But No Links Clicked; Link Clicked; Message Sent; or No Links Clicked and Email Not Opened).
- The second field is the Description field which will display a short description for when the connection will be triggered.
- The next field is the Status field where you can activate or deactivate the connection by clicking the blue or red button respectively. Activating a connection means that the connection will be able to be used as part of the campaign and should perform as expected.

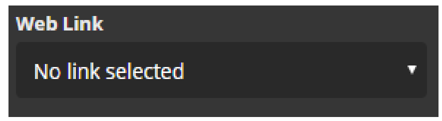


[**Note:** Keep in mind the connection will not become active until you save the campaign.]

- If you chose the "Email Opened, But No Links Clicked" or "No Links Clicked and Email Not Opened" option, the next field will be Duration to Wait. This is where you decide how long the system will wait for the email recipient to either open the email or click the link before triggering the connection. There are two dropdowns in this field, one where you choose a unit of time (minutes, hours, or days) and another where you choose the number of that time unit you want to wait. So, if you select "5" in the first dropdown and "Days" in the second dropdown, the system will wait five days for a recipient to open the email or click a link before firing the trigger.

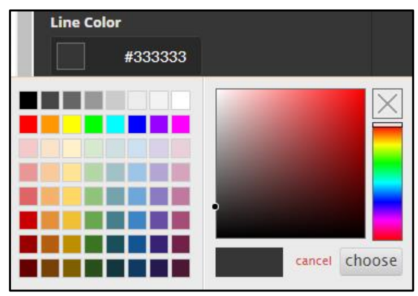


- If you chose the "Link Clicked" option, the next field will be Web Link. This is where you will select the link the recipient must click in order to fire the trigger. Only the links present in the current email will be available to choose from. Select the link to connect with this trigger from the dropdown menu provided. Alternatively, you can select "Any link clicked" from the dropdown, which means the trigger will fire if any link in the email is clicked; this trigger will only fire once.



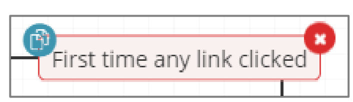
- The final field is the Line Color field where you can choose the color for that connection's line.

To choose a color:

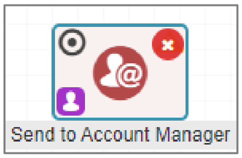


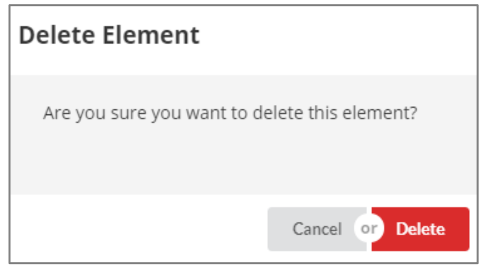
> Click on the color square in the field and a color selector will appear or enter the hex code of the color in the field next to the square.
> Choose your desired color from the pre-set swatches on the left side of the selector dropdown or use the right side to manually choose a color.
> Click the Choose 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.

- To copy a connection, hover your mouse over the textbox appearing on the connection to show a blue button at the top left of the textbox. Copying a connection saves you from having to re-configure the settings for any additional connections requiring the same conditions, saving time. Click and drag this button to create a new connection that can be attached to a new element. All connection settings configured in the initial connection will be copied over to the new connection.



- Delete a connection by hovering over the connection's textbox and clicking the red "X" button.
- To delete the element from the campaign, hover your mouse over the element and click the red "X" button in the top right corner that appears. A pop-up window will appear asking you to confirm the deletion. Click the red Delete button to complete the deletion or Cancel to close the window without deleting the element.



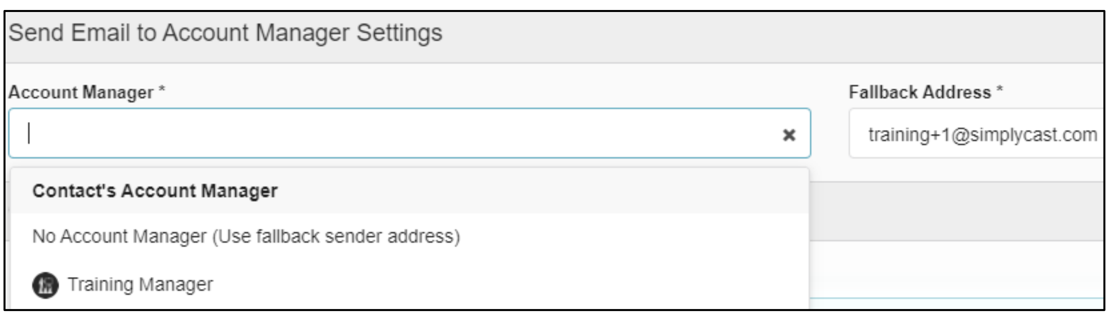


[**Note:** You will only receive the confirmation pop-up if the element has been activated or if the campaign has been saved.]

Account Manager Settings

When you are setting up your email to be sent to an account manager, there are a few variations on the email settings page.

On the second step of the email setup process, instead of the Contact List Selection settings, you will see a section called Send Email to Account Manager Settings with the following fields:



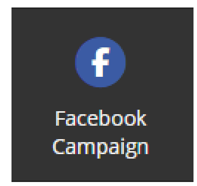
- **Account Manager:** This field allows you to choose who to send an email to once a contact reaches this stage in the SimplyCast 360 workflow. The dropdown gives you a few options to choose from when assigning an account manager:
  - **Contact's Account Manager:** Selecting this option means that the email will be sent to whichever account user is assigned to the contact who reaches this element.
  - **No Account Manager (Use Fallback Sender Address):** Selecting this option means that email address that appears in the Fallback Address field will receive all emails for contacts who reach this element, regardless of whether they have an assigned account manager.
  - **Account Users:** This option is the list of available account managers in the system that appears in this dropdown menu, and allows you to select a specific account

manager from this list to be sent an email no matter which contact reaches this step in the workflow.

- **Fallback Address:** This field allows you to select an available sender address from the dropdown to be used in case there is no account manager assigned to a particular contact, or the No Account Manager option has been selected in the previous field.

Facebook Campaign

The next drag-and-drop element in the Campaigns tab is the Facebook Campaign Element. This element allows you to add a Facebook campaign to the SimplyCast 360, which can be triggered to start after a selected action in the campaign. When this point of the campaign is reached for the first time, this is when the Facebook post(s) that are part of the campaign would begin.

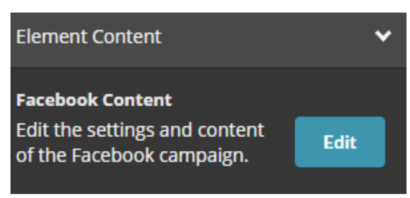


To begin setting up this element:

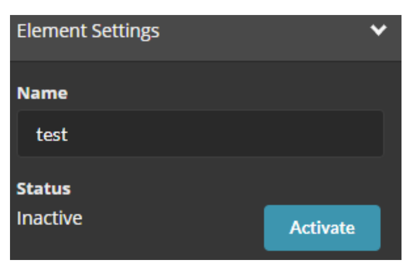
- Click and drag the Facebook Campaign element or double click it to add it to your canvas.
- When you place the element, a sidebar will appear where you can enter the name of the Facebook campaign.
- Click the green Create button to create the element and close the sidebar. Or, click the gray Cancel button to close the window without creating a Facebook campaign.

- Once you have placed the element onto your Canvas and have it selected with your mouse, four additional fields will appear in the Settings Panel:

  > **Facebook Content:** Clicking the blue Edit button in the Element Content section will bring you to the Facebook application where you can edit the content and settings of your Facebook campaign. Refer to the *SimplyCast Facebook User Guide* for more information about creating and editing Facebook campaigns.



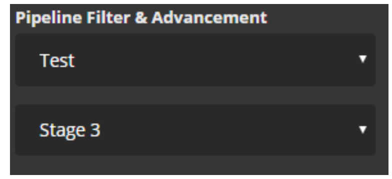
  > **Name:** This field contains the name you selected when you added the element to your canvas. To change the name of your element, edit the name in the textbox provided.



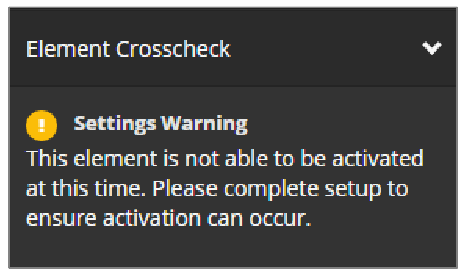
  > **Status:** This field is where you can activate or deactivate the element by clicking the blue or red button

respectively. Activating an element means that the element will be able to be used as part of the campaign and should perform as expected.

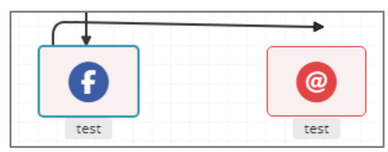
[**Note:** Keep in mind the element will not become active until you save the campaign.]



> **Pipeline Filter & Advancement:** Choose whether you would like contacts to progress through any pipelines you may have associated with the campaign. In the dropdown menu in this field, choose the pipeline you would like contacts to be added to. A second dropdown will appear to choose the stage of that pipeline contacts will be added to at this point of the campaign. If you choose to set a pipeline stage to this element, an icon will appear on the bottom left corner of the element in your campaign to indicate that contacts will move through a pipeline stage at this point in your campaign.

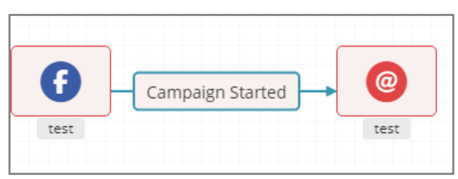


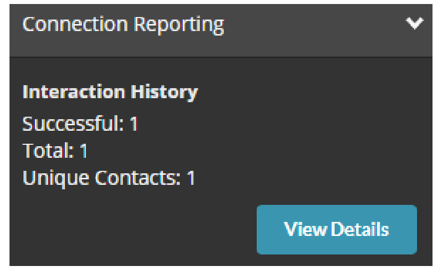
- If there is an issue with the element that needs to be resolved before the element can be activated, there will be a yellow or red exclamation point symbol in the top right corner of the element to signify this. If this is the case, when you select the element with your mouse, an additional section called Element Crosscheck will appear in the Settings Panel. The Element Crosscheck section will describe the issue with the element and provide instructions on how to resolve it.
- To connect your Facebook element to another element in your campaign, click the black target icon located on the top corner of the element and drag it over the element you wish to connect it to.



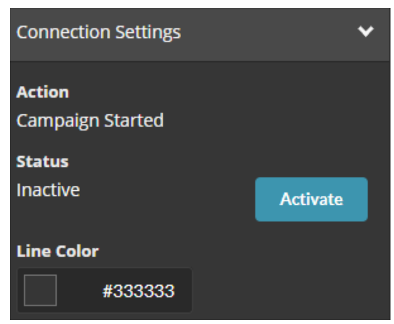
[**Note:** Some elements are not able to be connected to each other. For example, you cannot connect two Starting Point elements to each other, and you cannot connect a Starting Point element to the Contact Changed, Start from CRM, or Inbound API elements.]

- Once a connection has been established between the Facebook Campaign element and at least one other element, a textbox with the connection type will appear on the line. Click on this textbox to open two new sections in the Settings Panel, Connection Reporting and Connection Settings.





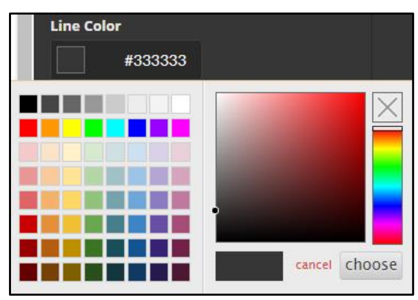
- The Connection Reporting section contains the Interaction History. When you first create the connection, it will only show that there have been no interactions. Once the connection has triggered at least once, you will see more information. Interaction History will then show the number of Successful (and Unsuccessful, if any) triggers, the Total number of triggers, and the number of Unique Contacts who have triggered the trigger.
- The View Details button, when selected, will open the Connection History Sidebar, allowing you to see the history of all the interactions associated with the element. See the section on Interaction History for more information.
-
- There are four fields in the Connection Settings section. The first field is the Action field, which indicates the connection type (Campaign Started).
- The second field is the Description field which will display a short description for when the connection will be triggered.
- The next field is the Status field where you can activate or deactivate the connection by clicking the blue or red button respectively. Activating a connection means that the connection will be able to be used as part of the campaign and should perform as expected.



[**Note:** Keep in mind the connection will not become active until you save the campaign.]

- The last field is the Line Color field where you can choose the color for that connection's line.

To choose a color:



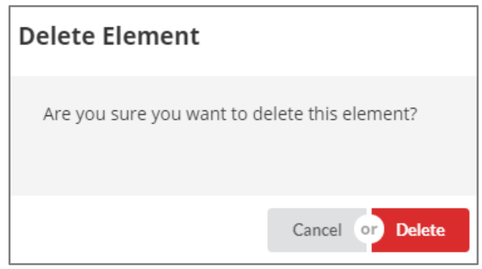
> Click on the color square in the field and a color selector will appear or enter the hex code of the color in the field next to the square.

> Choose your desired color from the pre-set swatches on the left side of the selector dropdown or use the right side to manually choose a color.

> 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.

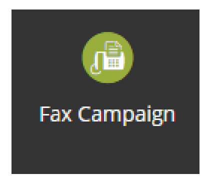
- To copy a connection, hover your mouse over the textbox appearing on the connection to show a blue button at the top left of the textbox. Copying a connection saves you from having to re-configure the settings for any additional connections requiring the same conditions, saving time. Click and drag this button to create a new connection that can be attached to a new element. All connection settings configured in the initial connection will be copied over to the new connection.

- Delete a connection by hovering over the connection's textbox and clicking the red "X" button.
- To delete the element from the campaign, hover your mouse over the element and click the red "X" button in the top right corner that appears. A pop-up window will appear asking you to confirm the deletion. Click the red Delete button to complete the deletion or Cancel to close the window without deleting the element.



[**Note:** You will only receive the confirmation pop-up if the element has been activated or if the campaign has been saved.]

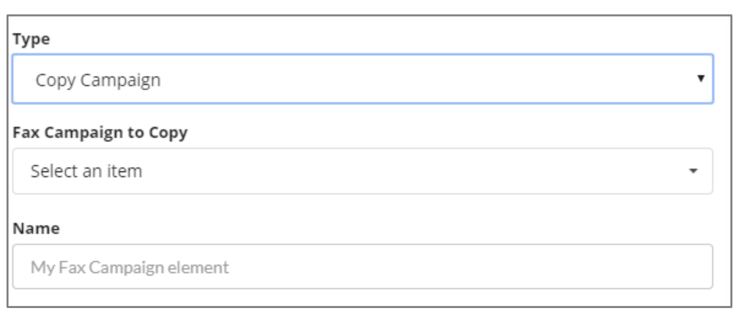
Fax Campaign



The next drag-and-drop element in the Campaigns tab is the Fax element. This element allows you to create and send a fax to your contacts when they reach a particular point in the campaign.

To begin setting up this element:

- Click and drag the Fax Campaign element or double click to add it to your canvas.
- When you place the element, a sidebar will appear with two fields. The first field will ask you to choose the type of fax you wish to create from the dropdown menu in the Type Field:
  - **New Campaign:** Create a new fax campaign from scratch.
  - **Copy Campaign:** A fax campaign created by copying an existing project. Choosing this option will create another field

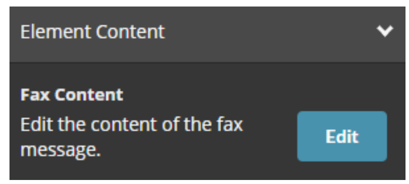


in the sidebar to select the existing fax campaign you would like to copy from the dropdown list provided.

- The second field (or third field, if you chose the Copy Campaign option) will ask you to name the fax campaign. Type the name of the campaign into the textbox provided.
- Click the green Create button to create the element and close the sidebar. Or, click the gray Cancel button to close the sidebar without adding a fax campaign.

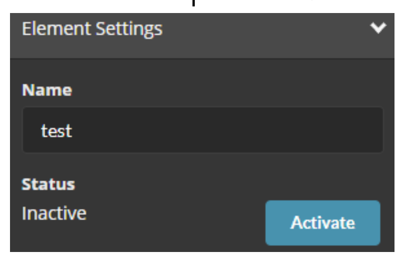
- Once you have placed the element onto your canvas and have it selected with your mouse, four additional fields will appear in the Settings Panel:

> **Fax Content:** Clicking the blue Edit button in the Element Content section will bring you to the Fax application, where you can edit the content and settings of your Fax campaign. Refer to the *SimplyCast Fax User Guide* for more information about creating and editing fax campaigns.



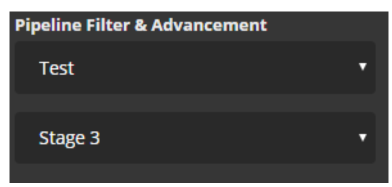
> **Name:** This field contains the name you selected when you added the element to the canvas. To change the name of the element, edit the name in the textbox provided.

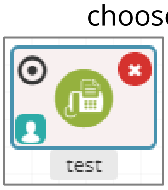
> **Status:** This field is where you can activate or deactivate the element by clicking the blue or red button respectively. Activating an element means that the element will be able to be used as part of the campaign and should perform as expected.



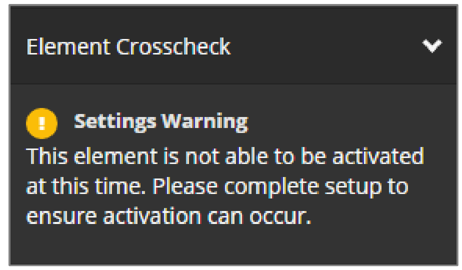
[**Note:** Keep in mind the element will not become active until you save the campaign.]

> **Pipeline Filter & Advancement:** Choose whether you would like contacts to progress through any pipelines you may have in the CRM. In the dropdown menu in this field, choose the pipeline you would like contacts to be added to. A second dropdown will appear to choose the stage of that pipeline contacts will be added to at this point of the campaign. If you choose to set a pipeline stage to this element, an icon will appear on the bottom left corner of the element in your campaign to indicate that contacts will move to a pipeline stage at this point in your campaign.

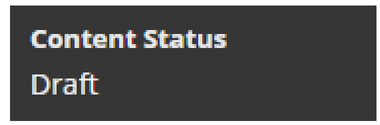




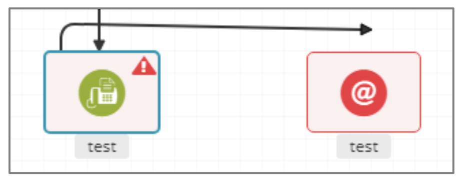
- If there is an issue with the element that needs to be resolved before the element can be activated, there will be a yellow or red exclamation point symbol in the top right corner of the element to signify this. If this is the case, when you select the element with your mouse, an additional section called Element Crosscheck will appear in the Settings Panel. The Element Crosscheck section will describe the issue with the element and provide instructions on how to resolve it.



[**Note:** An additional field will appear in the Element Settings section once the SimplyCast 360 campaign has been saved. The Content Status field will indicate the current status of the campaign, whether a draft, active, or in error status. This field will reflect any warning appearing in the Element Crosscheck section.]

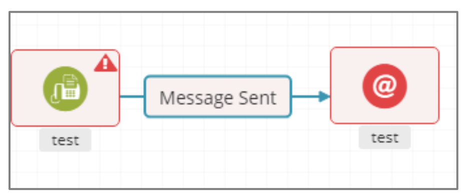


- To connect your Fax element to another element in your campaign, click the black target icon located on the top corner of the element and drag it over the element you wish to connect it to.

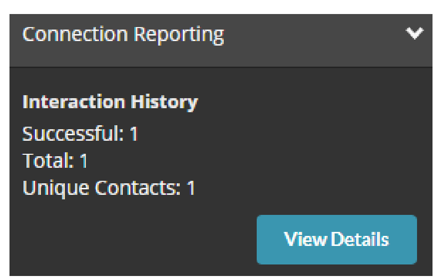


[**Note:** Some elements are not able to be connected to each other. For example, you cannot connect two Starting Point elements to each other, and you cannot connect a Starting Point element to the Contact Changed, Start from CRM, or Inbound API elements.]

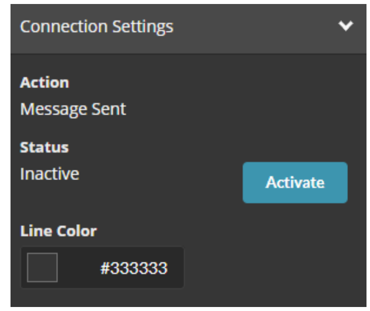
- Once a connection has been established between the Fax Campaign element and at least one other element, a textbox with the connection type will appear on the line. Click on this textbox to open two new sections in the Settings Panel, Connection Reporting and Connection Settings.



- The Connection Reporting section contains the Interaction History. When you first create the connection, it will only show that there have been no interactions. Once the connection has triggered at least once, you will see more information. Interaction History will then show the number of Successful (and Unsuccessful, if any) triggers, the Total number of triggers, and the number of Unique Contacts who have triggered the trigger.



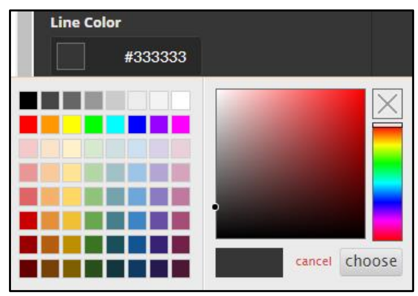
- The View Details button, when selected, will open the Connection History Sidebar, allowing you to see the history of all the interactions associated with the element. See the section on Interaction History for more information.
-



- There are three fields in the Connection Settings section. The first field is the Action field, which indicates the connection type (Message Sent).
- The second field is the Description field which will display a short description for when the connection will be triggered.
- The next field is the Status field where you can activate or deactivate the connection by clicking the blue or red button respectively. Activating a connection means that the connection will be able to be used as part of the campaign and should perform as expected.

[**Note:** Keep in mind the connection will not become active until you save the campaign.]

- The last field is the Line Color field where you can choose the color for that connection's line.

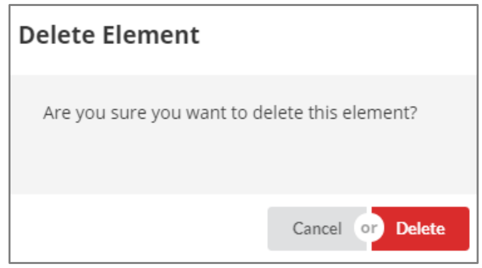


To choose a color:

> 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.
> Choose your desired color from the pre-set swatches on the left side of the selector dropdown or use the right side to manually choose a color.
> 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.

- To copy a connection, hover your mouse over the textbox appearing on the connection to show a blue button at the top left of the textbox. Copying a connection saves you from having to re-configure the settings for any additional connections requiring the same conditions, saving time. Click and drag this button to create a new connection that can be attached to a new element. All connection settings configured in the initial connection will be copied over to the new connection.

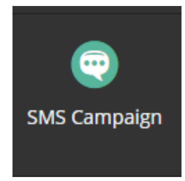
- Delete a connection by hovering over the connection's textbox and clicking the red "X" button.



- To delete the element from the campaign, hover your mouse over the element and click the red "X" button in the top right corner that appears. A pop-up window will appear asking you to confirm the deletion. Click the red Delete button to complete the deletion or Cancel to close the window without deleting the element.

[**Note:** You will only receive the confirmation pop-up if the element has been activated or if the campaign has been saved.]

SMS Campaign



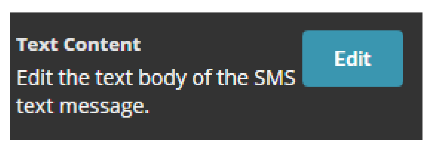
The next drag-and-drop element in the Campaigns tab is the SMS Campaign element. This element allows you to create and send an SMS message to your contacts when they reach a particular point in the campaign.

To begin setting up this element:

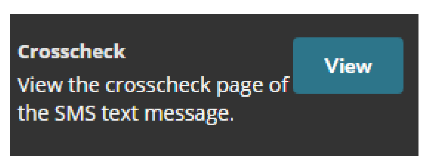
- Click and drag the SMS Campaign element or double click it to add it to your canvas.
- When you place the element, a sidebar will appear where you can enter the name of the SMS campaign.
- Click the green Create button to create the element and close the sidebar. Or, click the gray Close button to close the sidebar without adding an SMS campaign.

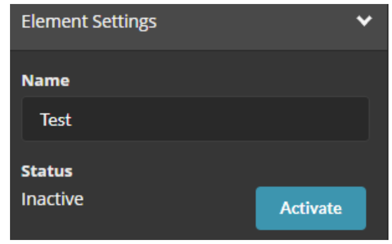
- Once you have placed the element onto your canvas and have it selected with your mouse, five additional fields will appear in the Settings Panel:

  > **Text Content:** Clicking the blue Edit button in the Element Content section will bring you to the SMS application, where you can edit the content and settings for your SMS campaign. Refer to the *SimplyCast SMS User Guide* for more information about creating and editing SMS campaigns.



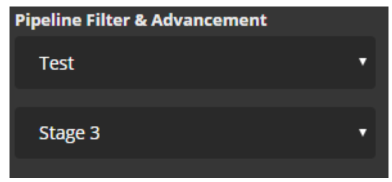
  > **Crosscheck:** Clicking the blue View button in the Crosscheck field in the Element Content section will bring you to the Crosscheck page in the SMS application, where you can make sure all settings in the campaign are correct to ensure proper SMS sending. Refer to the *SimplyCast SMS User Guide* for more information about the SMS Crosscheck page.



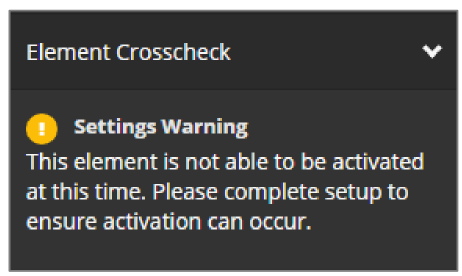


- **Name:** This field contains the name you selected when you added the element to your canvas. To change the name of your element, edit the name in the textbox provided.
- **Status:** This field is where you can activate or deactivate the element by clicking the blue or red button respectively. Activating an element that the element will be able to be used as part of the campaign and should perform as expected.

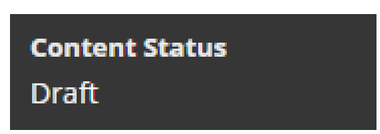
[**Note:** Keep in mind the element will not become active until you save the campaign.]



- **Pipeline Filter & Advancement:** Choose whether you would like contacts to progress through any pipelines you may have associated with the campaign. In the dropdown menu in this field, choose the pipeline you would like contacts to be added to. A second dropdown will appear to choose the stage of that pipeline contacts will be added to at this point of the campaign. If you choose to set a pipeline stage to this element, an icon will appear on the bottom left corner of the element in your campaign to indicate that contacts will move through a pipeline stage at this point in your campaign.

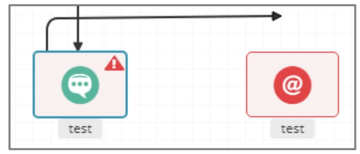


- If there is an issue with the element that needs to be resolved before the element can be activated, there will be a yellow or red exclamation point symbol in the top right corner of the element to signify this. If this is the case, when you select the element with your mouse, an additional section called Element Crosscheck will appear in the Settings Panel. The Element Crosscheck section will describe the issue with the element and provide instructions on how to resolve it.



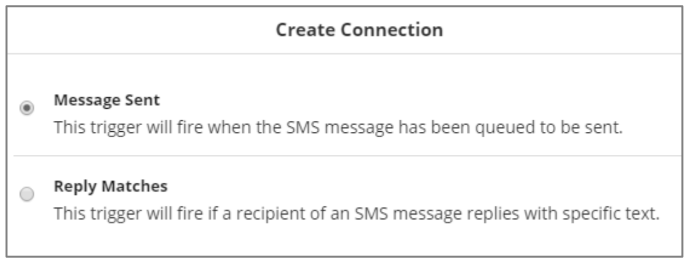
[**Note:** An additional field will appear in the Element Settings section once the SMS campaign has been saved. The Content Status field will indicate the current status of the campaign, whether a draft, active, or in error status. This field will reflect any warning appearing in the Element Crosscheck section.]

- To connect your SMS element to another element in your campaign, click the black target icon located on the top corner of the element and drag it over the element you wish to connect it to.



[**Note:** Some elements are not able to be connected to each other. For example, you cannot connect two Starting Point elements to each other, and you cannot connect a Starting Point element to the Contact Changed, Start from CRM, or Inbound API elements.]

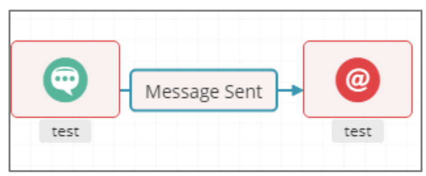
- A sidebar will appear where you can choose between two connection types:



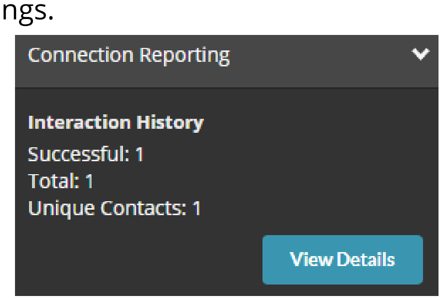
  > **Message Sent:** This means the campaign will continue through the connection when the SMS message has been queued to be sent.
  > **Reply Matches:** This means the campaign will continue through the connection if a recipient of an SMS message replies with a specific response.

- Click the green Create button to connect the two elements or the gray Close button to close the sidebar without connecting the two elements.

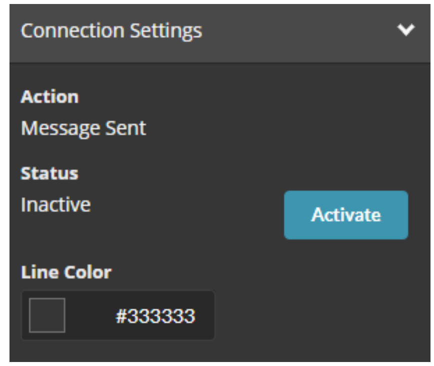
- Once a connection has been established between the SMS Campaign element and at least one other element, a textbox with the connection type will appear on the line.



- Click on this textbox to open two new sections in the Settings Panel, Connection Reporting and Connection Settings.
- The Connection Reporting section contains the Interaction History. When you first create the connection, it will only show that there have been no interactions. Once the connection has triggered at least once, you will see more information. Interaction History will then show the number of Successful (and Unsuccessful, if any) triggers, the Total number of triggers, and the number of Unique Contacts who have triggered the trigger.



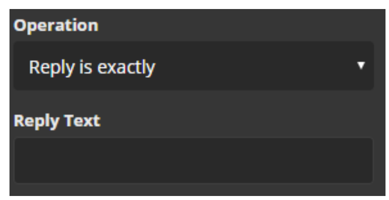
- The View Details button, when selected, will open the Connection History Sidebar, allowing you to see the history of all the interactions associated with the element. See the section on Interaction History for more information.
-



- Depending on the connection option selected, there will be either four or six fields in the Connection Settings section. The first field is the Action field, which indicates the connection type (Message Sent or Reply Matches).
- The second field is the Description field which will display a short description for when the connection will be triggered.
- The next field is the Status field where you can activate or deactivate the connection by clicking the blue or red button respectively. Activating a connection means that that the connection will be able to be used as part of the campaign and should perform as expected.

[**Note:** Keep in mind the connection will not become active until you save the campaign.]

- If you selected Reply Matches as your connection option, the next field will be Operation. This is the first step in determining the conditions with which the reply must comply in order to proceed through the connection. Choose one of these options from the dropdown menu provided:

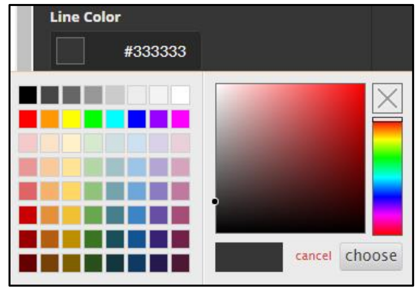


> **Reply contains:** The reply must contain the words or phrases in the Reply Text field in order to proceed through the connection.

> **Reply is exactly:** The reply must exactly match the text in the Reply Text field in order to proceed through the connection.

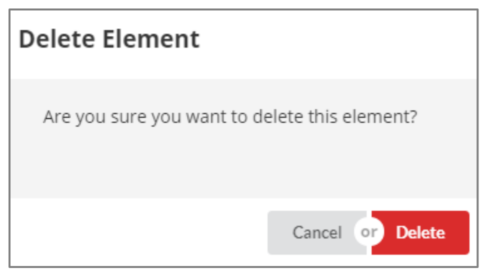
- If you selected Reply Matches as your connection option, the next field will be Reply Text. This is the text the Operation field will work with to determine whether a message will fire the trigger. Enter the word or phrase the reply message must contain in order to fire the trigger.
- The final field is the Line Color field where you can choose the color for that connection's line.

To choose a color:



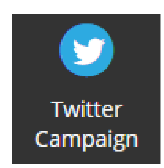
> Click on the color square in the field and a color selector will appear or enter the hex code of the color in the field next to the square.
> Choose your desired color from the pre-set swatches on the left side of the selector dropdown or use the right side to manually choose a color.
> Click the Choose 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.

- To copy a connection, hover your mouse over the textbox appearing on the connection to show a blue button at the top left of the textbox. Copying a connection saves you from having to re-configure the settings for any additional connections requiring the same conditions, saving time. Click and drag this button to create a new connection that can be attached to a new element. All connection settings configured in the initial connection will be copied over to the new connection.
- Delete a connection by hovering over the connection's textbox and clicking the red "X" button.
- To delete the element from the campaign, hover your mouse over the element and click the red "X" button in the top right corner that appears. A pop-up window will appear asking you to confirm the deletion. Click the red Delete button to complete the deletion or Cancel to close the window without deleting the element.



[**Note:** You will only receive the confirmation pop-up if the element has been activated or if the campaign has been saved.]

Twitter Campaign

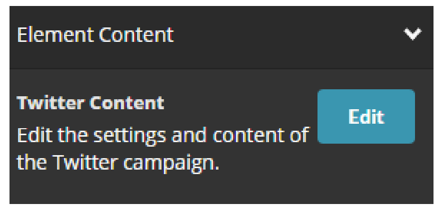


The next drag-and-drop element in the Campaign tab is the Twitter Campaign Element. This element allows you to add a Twitter campaign to the campaign, which can be triggered by a selected action within the campaign.

To begin setting up this element:

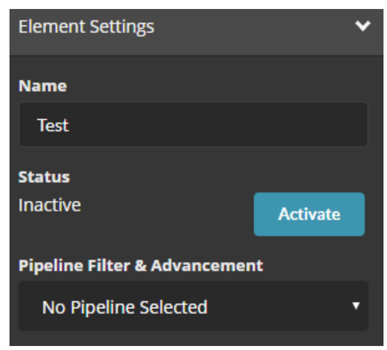
- Click and drag the Twitter element or double click it to add it to your canvas.
- When you place the element, a sidebar will appear where you can enter the name of the Twitter campaign.

- Click the green Create button to create the element and close the sidebar. Or, click the gray Close button to close the sidebar without creating a Twitter campaign.
- Once you have placed the element onto the canvas and have it selected with your mouse, four additional fields will appear in the Settings Panel on the right-hand side of your screen:



> **Twitter Content:** Clicking the blue Edit button in the Twitter Content field will bring you to the Twitter tool where you can edit the content and settings of your Twitter campaign. Refer to the *SimplyCast Twitter User Guide* for more information about creating and editing Twitter campaigns.

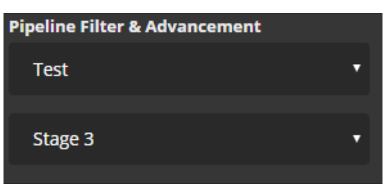
> **Name:** The name you selected when you added the element to your canvas. To change the name of your element, edit the name in the textbox provided.

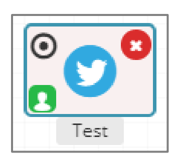


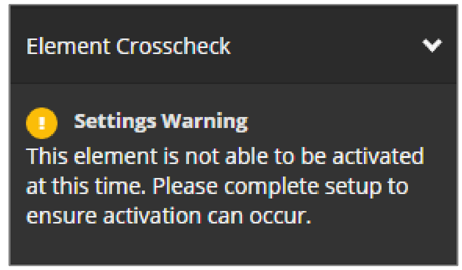
> **Status:** Activate or deactivate the element by clicking the blue or red button respectively. Activating an element means that the element will be able to be used as part of the campaign and should perform as expected.

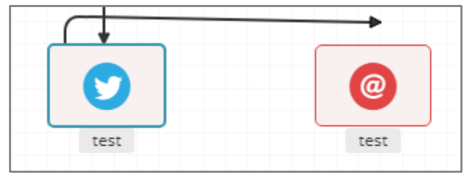
[**Note:** Keep in mind the element will not become active until you save the campaign.]

> **Pipeline Filter & Advancement:** Choose whether you would like contacts to progress through any pipelines you may have associated with the campaign. In the dropdown menu in this field, choose the pipeline you would like contacts to be added to. A second dropdown will appear to choose the stage of that pipeline contacts will be added to at this point of the campaign. If you choose to set a pipeline stage to this element, an icon will appear on the bottom left corner of the element in your campaign to indicate that contacts will move through a pipeline stage at this point in your campaign.



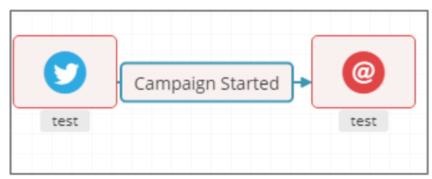




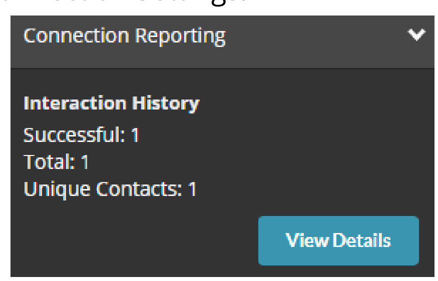


- If there is an issue with the element that needs to be resolved before the element can be activated, there will be a yellow or red exclamation point symbol in the top right corner of the element to signify this. If this is the case, when you select the element with your mouse, an additional section called Element Crosscheck will appear in the Settings Panel. The Element Crosscheck section will describe the issue with the element and provide instructions on how to resolve it.
- To connect your Twitter element to another element in your campaign, click the black target icon located on the top corner of the element and drag it over the element you wish to connect it to.

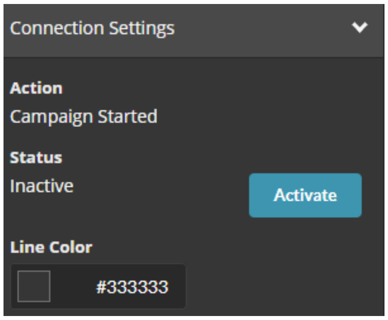
[**Note:** Some elements are not able to be connected to each other. For example, you cannot connect two Starting Point elements to each other, and you cannot connect a Starting Point element to the Contact Changed, Start from CRM, or Inbound API elements.]



- Once a connection has been established between the Twitter campaign element and at least one other element, a textbox with the connection type will appear on the line. Click on this textbox to open two new sections in the Settings Panel, Connection Reporting and Connection Settings.



- The Connection Reporting section contains the Interaction History. When you first create the connection, it will only show that there have been no interactions. Once the connection has triggered at least once, you will see more information. Interaction History will then show the number of Successful (and Unsuccessful, if any) triggers, the Total number of triggers, and the number of Unique Contacts who have triggered the trigger.
- The View Details button, when selected, will open the Connection History Sidebar, allowing you to see the history of all the interactions associated with the element. See the section on Interaction History for more information.
-



- There are four fields in the Connection Settings section. The first field is the Action field, which indicates the connection type (Campaign Started).

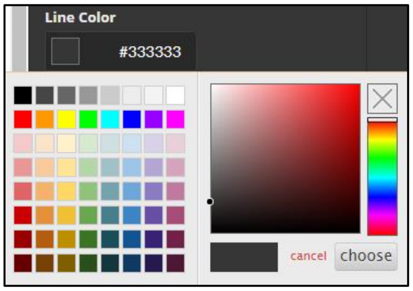
[**Note:** The Twitter campaign will only start once, but this connection setting will allow future contacts who reach this point to pass through to the next element.]

- The second field is the Description field which will display a short description for when the connection will be triggered.
- The next field is the Status field where you can activate or deactivate the connection by clicking the blue or red button respectively. Activating a connection means that the connection will be able to be used as part of the campaign and should perform as expected.

[**Note:** Keep in mind the connection will not become active until you save the campaign.]

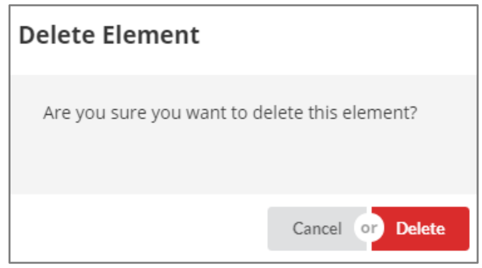
- The last field is the Line Color field where you can choose the color for that connection's line.

To choose a color:

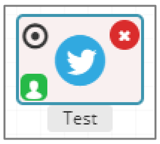


> Click on the color square in the field and a color selector will appear or enter the hex code of the color in the field next to the square.
> Choose your desired color from the pre-set swatches on the left side of the selector dropdown or use the right side to manually choose a color.
> Click the Choose 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.

- To copy a connection, hover your mouse over the textbox appearing on the connection to show a blue button at the top left of the textbox. Copying a connection saves you from having to re-configure the settings for any additional connections requiring the same conditions, saving time. Click and drag this button to create a new connection that can be attached to a new element. All connection settings configured in the initial connection will be copied over to the new connection.

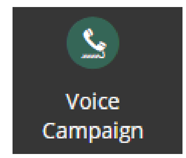


- Delete a connection by hovering over the connection's textbox and clicking the red "X" button.
- To delete the element from the campaign, hover your mouse over the element and click the red "X" button in the top right corner that appears. A pop-up window will appear asking you to confirm the deletion. Click the red Delete button to complete the deletion or Cancel to close the window without deleting the element.



[**Note:** You will only receive the confirmation pop-up if the element has been activated or if the campaign has been saved.]

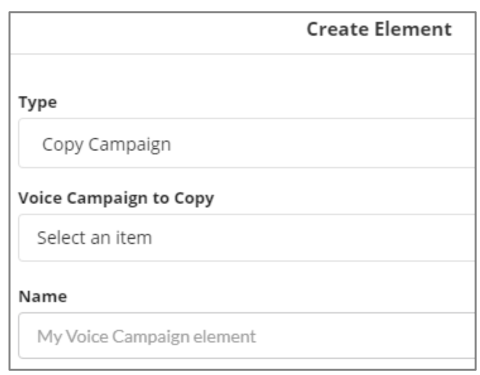
Voice Campaign

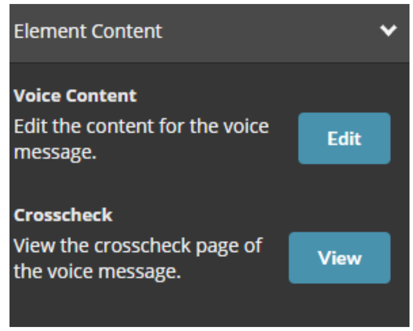


The next drag-and-drop element that appears in the Campaigns tab is the Voice Campaign element. This element allows you to create and send a voice message to your contacts when they reach a particular point in the campaign.

To begin setting up this element:

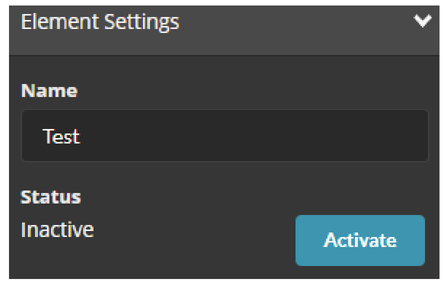
- Drag and drop the element or double click it to add it to the canvas.
- When you drop the element, a sidebar will appear with two fields. The first field is where you can choose either to create a new voice campaign from scratch or copy an existing voice campaign.
- If you choose to create a new voice campaign, the second field will ask you to name the new voice project. Type the name into the textbox provided.
- If you choose to copy an existing voice campaign, the second field will ask you to select the voice campaign to copy from a dropdown menu provided.
- After selecting the existing voice campaign that will be copied, the third field will prompt you to name the new voice campaign. Type the name into the textbox provided.
- Click the green Create button to create the element and close the pop-up. Or, click the gray Cancel button to close the window without creating a voice campaign.
- Once you have placed the element onto the canvas and have it selected with your mouse, five additional fields will appear in the Settings Panel on the right-hand side of your screen:





> **Voice Content:** Clicking the blue Edit button in the Voice Content field will bring you to the Voice application, where you can edit the content and settings for the voice campaign. Refer to the *SimplyCast Voice User Guide* for more information on creating and editing voice messages.

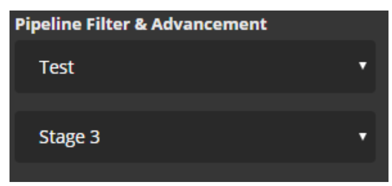
> **Crosscheck:** Clicking the blue View button in the Crosscheck field will redirect you to the crosscheck page for the voice message so you can make sure all the settings are configured correctly.



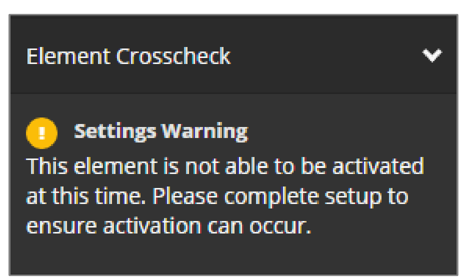
> **Name:** This field contains the name you selected when you added the element to your canvas. To change the name of your element, simply edit the name in the textbox provided.

> **Status:** This field is where you can activate or deactivate the element by clicking the blue or red button respectively. Activating an element means that the element will be able to be used as part of the campaign and should perform as expected.

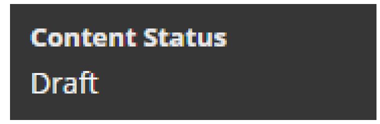
[**Note:** Keep in mind the element will not become active until you save the campaign.]



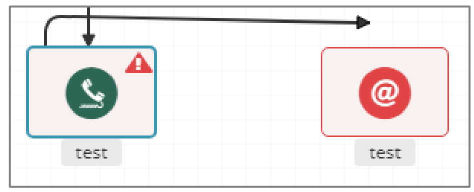
> **Pipeline Filter & Advancement:** Choose whether you would like contacts to progress through any pipelines you may have. In the dropdown menu in this field, choose the pipeline you would like contacts to be added to. A second dropdown will appear to choose the stage of that pipeline contacts will be added to at this point of the campaign. If you choose to set a pipeline stage to this element, an icon will appear on the bottom left corner of the element in your campaign to indicate that contacts will move through a pipeline stage at this point in your campaign.



- If there is an issue with the element that needs to be resolved before the element can be activated, there will be a yellow or red exclamation point symbol in the top right corner of the element to signify this. If this is the case, when you select the element with your mouse, an additional section called Element Crosscheck will appear in the Settings Panel. The Element Crosscheck section will describe the issue with the element and provide instructions on how to resolve it.



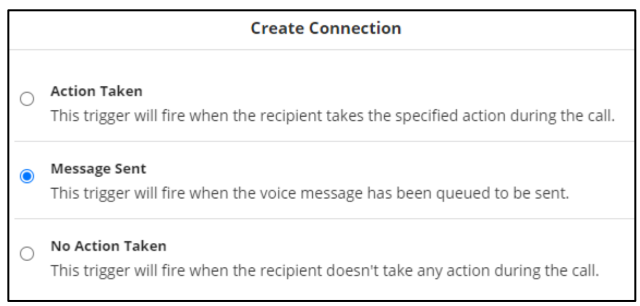
[**Note:** An additional field will appear in the Element Settings section once the 360 campaign has been saved. The Content Status field will indicate the current status of the campaign, whether a draft, active, or in error status. This field will reflect any warning appearing in the Element Crosscheck section.]



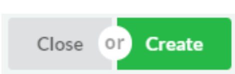
- To connect your Voice Campaign element to another element in your campaign, click the black target icon located on the top corner of the element and drag it over to the element you wish to connect it to.

[**Note:** Some elements are not able to be connected to each other. For example, you cannot connect two Starting Point elements to each other, and you cannot connect a Starting Point element to the Contact Changed, Start from CRM, or Inbound API elements.]

- A sidebar will appear where you can choose between three connection types:



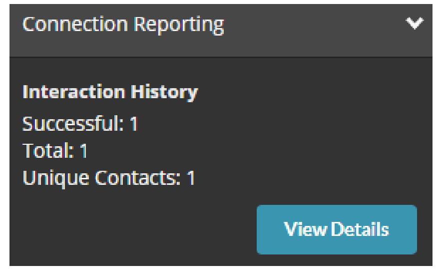
> **Action Taken:** This option means the campaign will continue only if the recipient takes a specific action during the call.
> **Message Sent:** This means the campaign will continue through the connection when the Voice message has been queued to be sent.
> **No Action Taken:** This option means the campaign will continue only if the recipient does not take any action during the call.



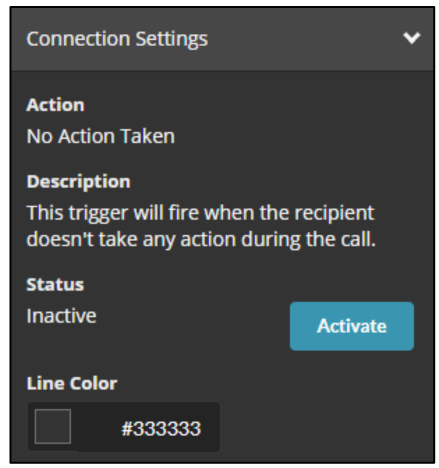
- Click the green Create button to connect the two elements or the gray Close button to close the sidebar without connecting the two elements.

- Once a connection has been established between the Voice Campaign element and at least one other element, a textbox with the connection type will appear on the line. Click on this textbox to open two new sections in the Settings Panel, Connection Reporting and Connection Settings.

- The Connection Reporting section contains the Interaction History. When you first create the connection, it will only show that there have been no interactions. Once the connection has triggered at least once, you will see more information. Interaction History will then show the number of Successful (and Unsuccessful, if any) triggers, the Total number of triggers, and the number of Unique Contacts who have triggered the trigger.

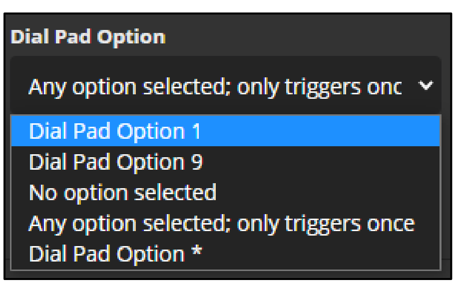


- The View Details button, when selected, will open the Connection History Sidebar, allowing you to see the history of all the interactions associated with the element. See the section on Interaction History for more information.



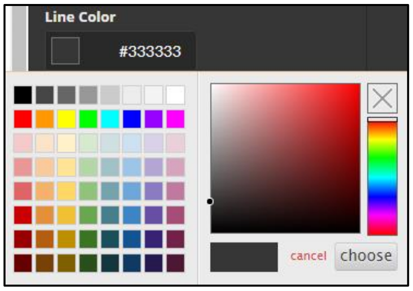
- There up to five fields in the Connection Settings section, depending on the type of connection. The first field is the Action field, which indicates the connection type (Message Sent, Action Taken, No Action Taken).
- The second field is the Description field which will display a short description for when the connection will be triggered.
- The next field is the Status field where you can activate or deactivate the connection by clicking the blue or red button respectively. Activating a connection means that the connection will be able to be used as part of the campaign and should perform as expected.

[**Note:** Keep in mind the connection will not become active until you save the campaign.]



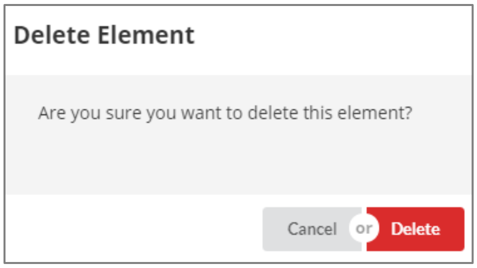
- If you selected Action Taken, the Dial Pad Option field will appear, allowing you to select which action will trigger the connection, with options matching the actions configured within the Voice campaign itself. The options can include options for the dial pad from 1-9, as well as the "*" and "#" keys. There is also an option for any option, which will trigger when any dial option is selected, but only once per call.
- The last field is the Line Color field where you can choose the color for that connection's line.

To choose a color:

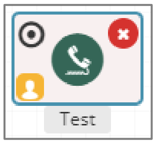


> Click on the color square in the field and a color selector will appear or enter the hex code of the color in the field next to the square.
> Choose your desired color from the pre-set swatches on the left side of the selector dropdown or use the right side to manually choose a color.
> Click the Choose 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.

- To copy a connection, hover your mouse over the textbox appearing on the connection to show a blue button at the top left of the textbox. Copying a connection saves you from having to re-configure the settings for any additional connections requiring the same conditions, saving time. Click and drag this button to create a new connection that can be attached to a new element. All connection settings configured in the initial connection will be copied over to the new connection.



- Delete a connection by hovering over the connection's textbox and clicking the red "X" button.
- To delete the element from the campaign, hover your mouse over the element and click the red "X" button in the top right corner that appears. A pop-up window will appear asking you to confirm the deletion. Click the red Delete button to complete the deletion or Cancel to close the window without deleting the element.

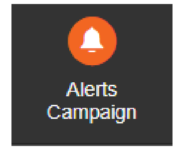


[**Note:** You will only receive the confirmation pop-up if the element has been activated or if the campaign has been saved.]

Emergency

The next tab in the Creation Panel on the left side of the screen is the Emergency tab. This tab contains the emergency communication elements, which are part of SimplyCast's emergency suite of tools that can be used to send out notifications quickly and efficiently in the case of an emergency.

Alerts Campaign

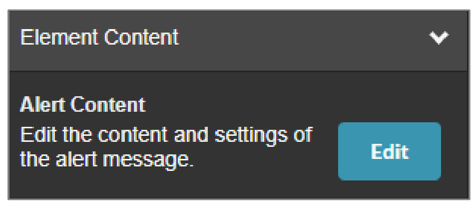


The only drag-and-drop element in the Emergency tab is the Alerts Campaign element. This element allows you to create and send an alert to your contacts via multiple communication channels when they reach a particular point in the campaign.

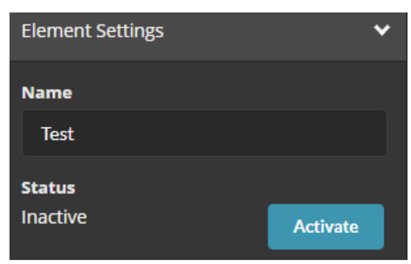
To begin setting up this element:

- Click and drag the Alerts element or double click to add it to your canvas.
- When you place the element, a sidebar will appear. The field in this sidebar will ask you to enter a name for the new Alerts element. Enter a name into the field provided.
- Click the green Create button to create the element and close the sidebar. Or, click the gray Cancel button to close the sidebar without adding an Alerts Campaign element.

- Once you have placed the element onto your canvas and have it selected with your mouse, six additional fields will appear in the Settings Panel on the right-hand side of the screen:



> **Alert Content:** Clicking the blue Edit button in the Element Content section will bring you to the Alerts application, where you can design, create, and edit the content of the email. Refer to the *SimplyCast Alerts User Guide* for more information about creating and editing alert campaigns.

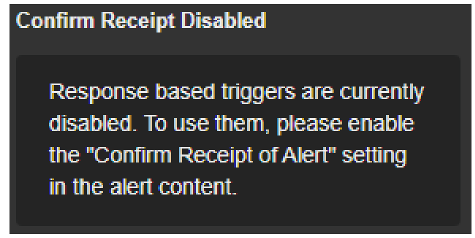


> **Name:** This field contains the name you selected when you added the element to your canvas. To change the name of your element, edit the name in the textbox provided.

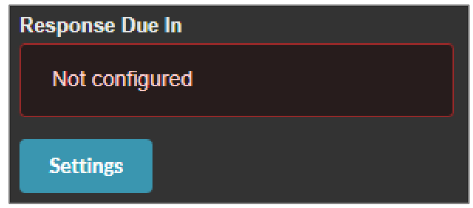
> **Status:** This field is where you can activate or deactivate the element by clicking the blue or red button respectively. Activating an element means that the element will be able to be used as part of the campaign and should perform as expected.

[**Note:** Keep in mind the element will not become active until you save the campaign.]

- **Confirm Receipt Disabled:** Before you have saved the SimplyCast 360 campaign after adding the Alerts element, you will see the Confirm Receipt Disabled field in the Settings Panel below the Status field. This field will provide you with a message warning you that the response-based triggers are disabled and to ensure that you have the Confirmation of Receipt section enabled in the Alerts setup.

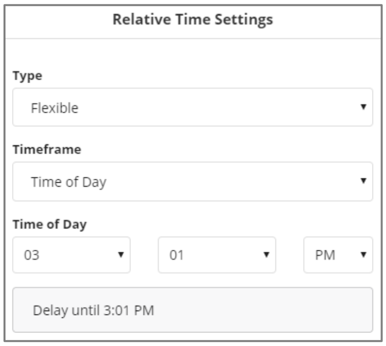


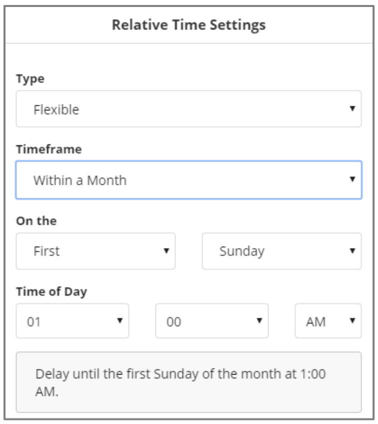
- **Response Due In:** Once you have saved the SimplyCast 360 campaign after adding the Alerts element, you will be able to set up the response-based triggers. This field contains two sections. The first section is a textbox which describes the length of time the system will wait for a response to the alert. By default, this textbox will say “Not Configured.” The second section is a blue Settings button where you can configure the amount of time the system will pause the campaign and wait for a response before progressing to the next element in the campaign. Clicking this button will open the Relative Time Settings sidebar where you can choose the type of response delay from the Type dropdown: Fixed Offset or Flexible.



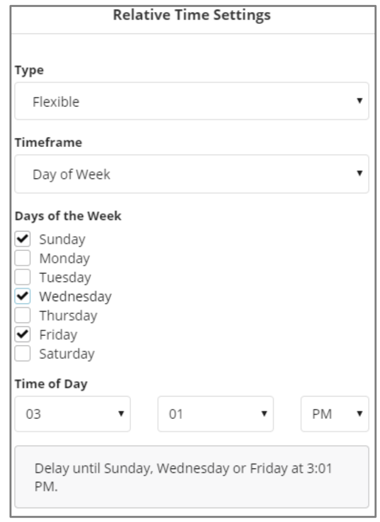
  - Fixed offset means that the system will wait a fixed amount of time for a response before the contacts will continue their progress in the campaign. Choosing Fixed Offset as your type will cause the Offset field to appear. This field includes two dropdowns and a textbox. Choose your unit of time from the dropdown on the right (minutes, hours, days, weeks, or months), and in the dropdown on the left, choose the number of the selected time unit. The textbox beneath the dropdowns will describe the time delay you configured. For example, if you chose “Days” in the dropdown on the right and “1” on the left, the textbox will explain that the system will wait one day.

>> A flexible delay means the response delay can be set to customized lengths of time, rather than a specific, fixed time. Choosing Flexible as your type causes a





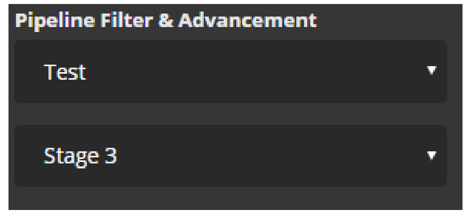
Timeframe dropdown field to appear in the sidebar. From this dropdown, choose whether you want the system to wait until a specific time of day, on a day of the week, or sometime within a month. Selecting the Time of Day option means the system will wait until a selected time within the next 24 hours. Choose the time the system will wait until from the dropdown menu options in the Time of Day field set. Selecting the Day of Week option will cause a Days of the Week field to appear where you must select the day(s) of the week option(s) you wish the system to wait until. Choose the day(s) when the response delay can end by checking them off. Then select the time of day the response delay will end by selecting the time from the dropdown menus available in the Time of Day field set. Selecting the Within a Month option will cause an “On the” field set to appear. Here, choose the week of the month you wish the system to wait for a response until in the first field, and in the second field select the day of the week. Choose the time of day the response delay will end from the dropdown menus available. The textbox below will describe the response delay interval configured for all flexible delay type options.



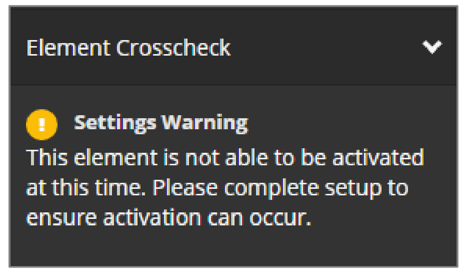
[**Note:** For example, say you selected the Day of Week option in the Timeframe dropdown Menu and chose Sunday, Wednesday, and Friday at 3:01PM in their respective fields. The textbox below the fields will indicate the system will wait for a response to the alert until the next Sunday, Wednesday, or Friday at 3:01PM.]

>> Once you have determined your response delay type and have selected the timeframe to use with your Alerts element, click the blue Confirm button at the bottom of the sidebar to save your settings and close the sidebar, or click the Cancel button to close the sidebar without configuring your response delay settings.

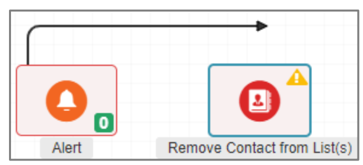
> **Pipeline Filter & Advancement:** Choose whether you would like contacts to progress through any pipelines you may have associated with the campaign. In the dropdown menu in this field, choose the pipeline you would like contacts to be added to. A second dropdown will appear to choose the stage of that pipeline contacts will be added to at this point of the campaign. If you choose to set a pipeline stage to this element, an icon will appear on the bottom left corner of the element in your campaign to indicate that contacts will move through a pipeline stage at this point in your campaign.



- If there is an issue with the element setup that needs to be resolved before the element can be activated, there will be a yellow or red exclamation point symbol in the top right corner of the element to signify this. If this is the case, when you select the element with your mouse, an additional section called Element Crosscheck will appear in the Settings Panel. The Element Crosscheck section will describe the issue with the element and provide instructions on how to resolve it.



- To connect your Alerts element to another element in your campaign, click the black target icon on the top corner of the element and drag it over to the element you wish to connect it to.

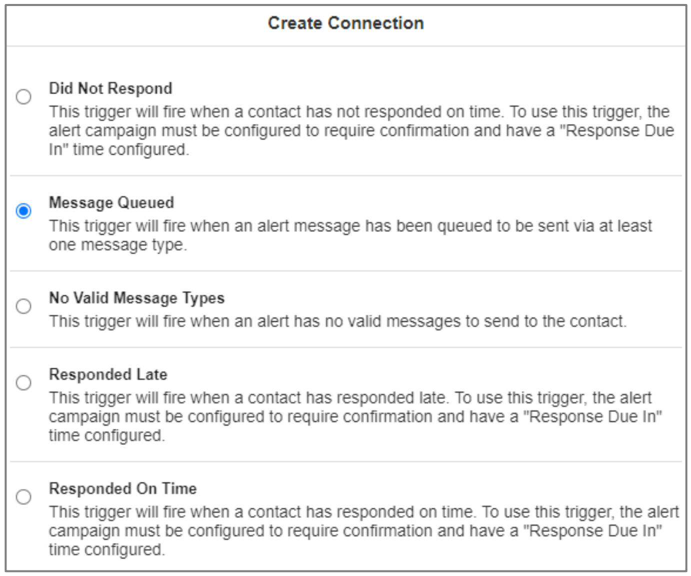


[**Note:** Some elements are not able to be connected to each other. For example, you cannot connect two Starting Point elements to each other, and you cannot connect a Starting Point element to the Contact Changed, Start from CRM, or Inbound API elements.]

- A sidebar will appear where you can choose between five connection types:

> **Did Not Respond:** This means the campaign will continue through the connection when a recipient does not respond to the alert at all within the configured time. The alert campaign must be configured with "Confirmation of Receipt" enabled and a "Response Due In" time configured to use this connection type.

> **Message Queued:** This means the campaign will continue through the connection if the alert has been queued to send to a contact via at least on communication channel.



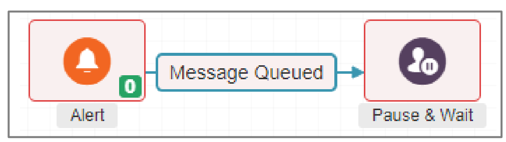
> **No Valid Message Types:** This means the campaign will continue through the connection when a contact has no contact information for any of the configured alert communication channels.

> **Responded Late:** This means the campaign will continue through the connection when the contact responds to the alert after the configured "Response Due In" time. The alert campaign must be configured with "Confirmation of Receipt" enabled and a "Response Due In" time configured to use this connection type.

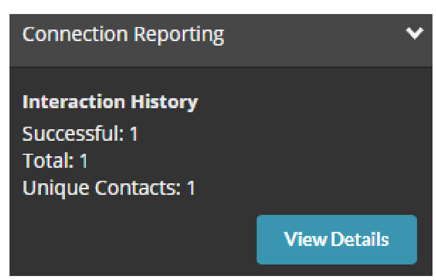
> **Responded On Time:** This means the campaign will continue through the connection if the contact responds to the alert within the configured "Response Due In" time. The alert campaign must be configured with "Confirmation of Receipt" enabled and a "Response Due In" time configured to use this connection type.

- Click the green Create button to connect the two elements or the gray Close button to close the sidebar without connecting the two elements.

- Once a connection has been established between the Alerts element and at least one other element, a textbox with the connection type will appear on the line.

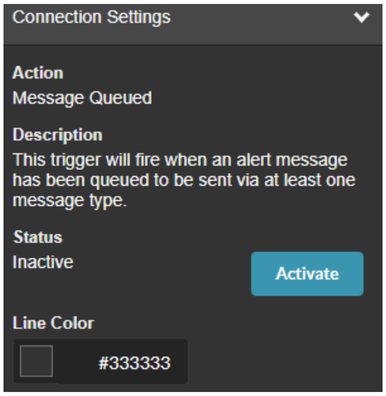


- Click on this textbox to open two new sections in the Settings Panel, Connection Reporting and Connection Settings.
- The Connection Reporting section contains the Interaction History. When you first create the connection, it will only show that there have been no interactions. Once the connection has triggered at least once, you will see more information. Interaction History will then show the number of Successful (and Unsuccessful, if any)



triggers, the Total number of triggers, and the number of Unique Contacts who have triggered the trigger.

- The View Details button, when selected, will open the Connection History Sidebar, allowing you to see the history of all the interactions associated with the element. See the section on Interaction History for more information.
- There are four fields in the Connection Settings section. The first field is the Action field, which indicates the connection type selected (Did Not Respond; Message Queued; No Valid Message Types; Responded Late; or Responded On Time).

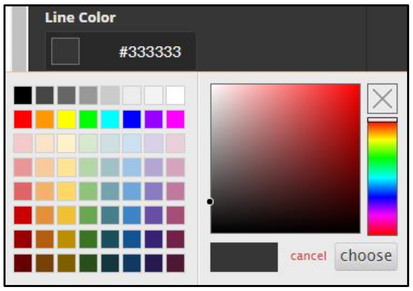


- The second field is the Description field which will display a short description for when the connection will be triggered.
- The next field is the Status field where you can activate or deactivate the connection by clicking the blue or red button respectively. Activating a connection means that the connection will be able to be used as part of the campaign and should perform as expected.

[**Note:** Keep in mind the connection will not become active until you save the campaign.]

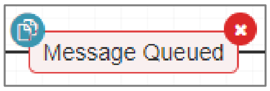
- The final field is the Line Color field where you can choose the color for that connection's line.

To choose a color:

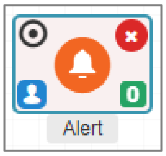


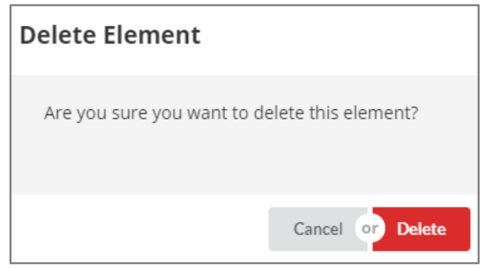
> Click on the color square in the field and a color selector will appear or enter the hex code of the color in the field next to the square.
> Choose your desired color from the pre-set swatches on the left side of the selector dropdown or use the right side to manually choose a color.
> Click the Choose 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.

- To copy a connection, hover your mouse over the textbox appearing on the connection to show a blue button at the top left of the textbox. Copying a connection saves you from having to re-configure the settings for any additional connections requiring the same conditions, saving time. Click and drag this button to create a new connection that can be attached to a new element. All connection settings configured in the initial connection will be copied over to the new connection.



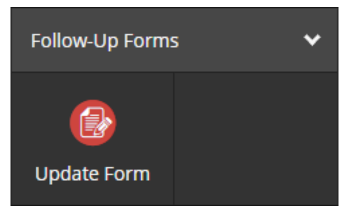
- Delete a connection by hovering over the connection's textbox and clicking the red "X" button.
- To delete the element from the campaign, hover your mouse over the element and click the red "X" button in the top right corner that appears. A pop-up window will appear asking you to confirm the deletion. Click the red Delete button to complete the deletion or Cancel to close the window without deleting the element.





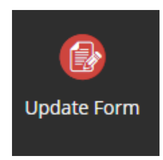
[**Note:** You will only receive the confirmation pop-up if the element has been activated or if the campaign has been saved.]

Follow-Up Forms



The next tab in the Creation Panel on the left side of the screen is the Follow-Up Forms tab. The element appearing in this tab is a type of form you can use to collect updated information from contacts who pass through the campaign.

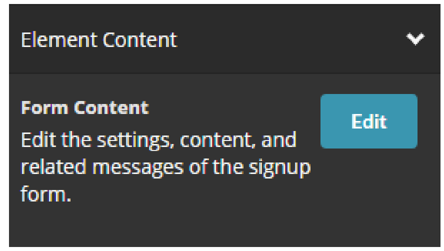
Update Form

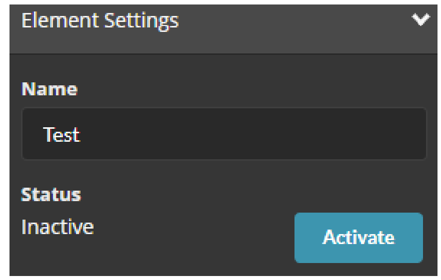


The first drag-and-drop element in the Follow-Up Forms tab is the Update Form element. This element allows you to create and send a form to your contacts when they reach a particular point in the campaign to gather updated contact information for their CRM profile.

To begin setting up this element:

- Click and drag the Update Form element or double click it to add it to the canvas.
- When you place the element, a sidebar will appear with a Name field that will ask you to enter a name for the new element. Type the name into the textbox provided.
- Click the green Create button to create the element and close the pop-up window. Or, click the gray Close button to close the window without adding an update form.





- Once you have placed the element onto the canvas and have it selected with your mouse, four additional fields will appear in the Settings Panel on the right-hand side of your screen:

  > **Form Content:** Clicking the blue Edit button in the Element Content section will bring you to the Form Builder application, where you can edit the content and settings of your update form. Refer to the *SimplyCast Form Builder & Survey User Guide* for more information about creating and editing update forms.

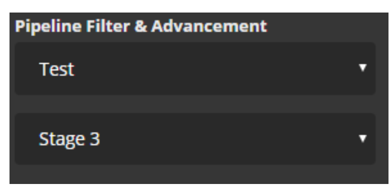
[**Note:** One key difference in the setup of an update form is the need to configure a notification email in which the form will be sent to contacts whereas with regular forms and surveys you are provided a series of links that can be used in emails or embedded on a website. This email will contain a button to direct recipients to the update form to fill out.]

[**Note:** With the Update Form element there are no modal settings to configure like with the forms created using the Form Builder. This is because the link to the form will appear in the notification email and not on a website.]

> **Name:** This field contains the name you selected when you added the element to the canvas. To change the name of your element, edit the name in the textbox provided.

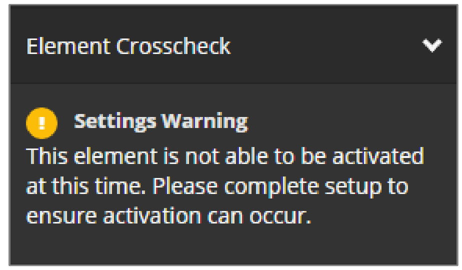
> **Status:** This field is where you can activate or deactivate the element by clicking the blue or red button respectively. Activating an element means that the element will be able to be used as part of the campaign and should perform as expected.

[**Note:** Keep in mind the element will not become active until you save the campaign.]

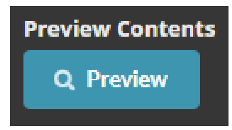


> **Pipeline Filter & Advancement:** Choose whether you would like contacts to progress through any pipelines you may have associated with the campaign. In the dropdown menu in this field, choose the pipeline you would like contacts to be added to. A second dropdown will appear to choose the stage of that pipeline contacts will be added to at this point of the campaign. If you choose to set a pipeline stage to this element, an icon will appear on the bottom left corner of the element in your campaign to indicate that contacts will move through a pipeline stage at this point in your campaign.

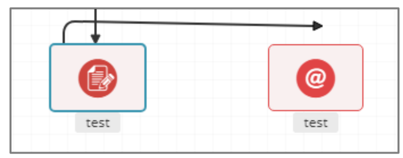
- If there is an issue with the element that needs to be resolved before the element can be activated, there will be a yellow or red exclamation point symbol in the top right corner of the element to signify this. If this is the case, when you select the element with your mouse, an additional section called Element Crosscheck will appear in the Settings Panel. The Element Crosscheck section will describe the issue with the element and provide instructions on how to resolve it.



- Once the form has been configured, you will see another field called Preview Contents. Click the blue Preview button to open a sidebar with a preview of what the update form will look like. Click the gray Close button to close the Preview sidebar.

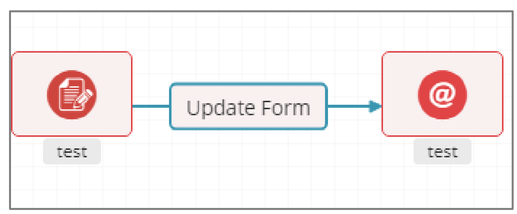


- To connect your Update Form element to another element in your campaign, click the black target icon located on the top corner of the element and drag it over the element you wish to connect it to.

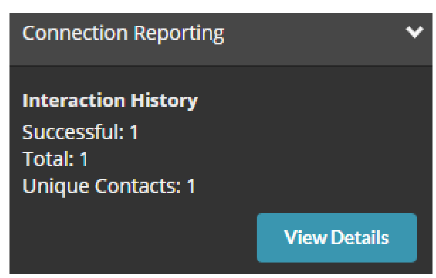


[**Note:** Some elements are not able to be connected to each other. For example, you cannot connect two Starting Point elements to each other, and you cannot connect a Starting Point element to the Contact Changed, Start from CRM, or Inbound API elements.]

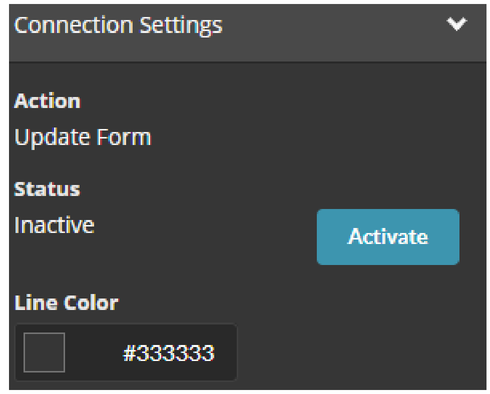
- Once a connection has been established between the Update Form element and at least one other element, a textbox with the connection type will appear on the line. Click on this textbox to open two new sections in the Settings Panel, Connection Reporting and Connection Settings.



- The Connection Reporting section contains the Interaction History. When you first create the connection, it will only show that there have been no interactions. Once the connection has triggered at least once, you will see more information. Interaction History will then show the number of Successful (and Unsuccessful, if any) triggers, the Total number of triggers, and the number of Unique Contacts who have triggered the trigger.



- The View Details button, when selected, will open the Connection History Sidebar, allowing you to see the history of all the interactions associated with the element. See the section on Interaction History for more information.

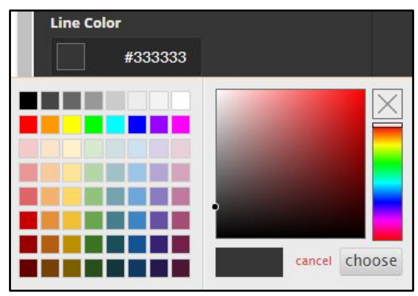


- There are four fields in the Connection Settings section. The first field is the Action field, which indicates the connection type (Update Form).
- The second field is the Description field which will display a short description for when the connection will be triggered.
- The next field is the Status field where you can activate or deactivate the connection by clicking the blue or red button respectively. Activating a connection means that the connection will be able to be used as part of the campaign and should perform as expected.

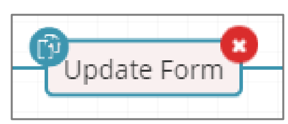
[**Note:** Keep in mind the connection will not become active until you save the campaign.]

- The last field is the Line Color field where you can choose the color for that connection's line.

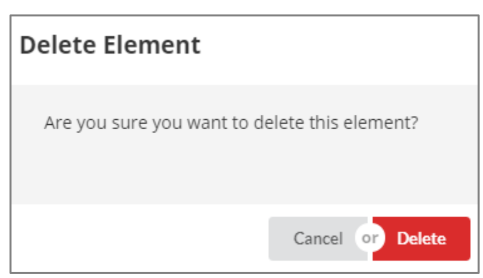
  To choose a color:



  > 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.
  > Choose your desired color from the pre-set swatches on the left side of the selector dropdown or use the right side to manually choose a color.
  > 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.

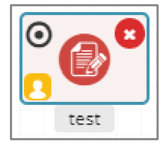


- To copy a connection, hover your mouse over the textbox appearing on the connection to show a blue button at the top left of the textbox. Copying a connection saves you from having to re-configure the settings for any additional connections requiring the same conditions, saving time. Click and drag this button to create a new connection that can be attached to a new element. All connection settings configured in the initial connection will be copied over to the new connection.

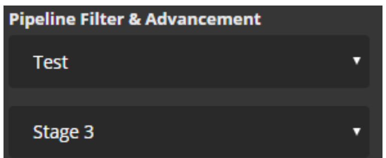


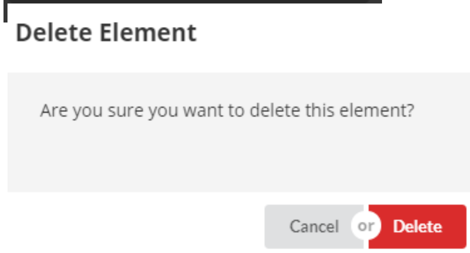
- Delete a connection by hovering over the connection's textbox and clicking the red "X" button.

- To delete the element from the campaign, hover your mouse over the element and click the red “X” button in the top right corner that appears. A pop-up window will appear asking you to confirm the deletion. Click the red Delete button to complete the deletion or Cancel to close the window without deleting the element.

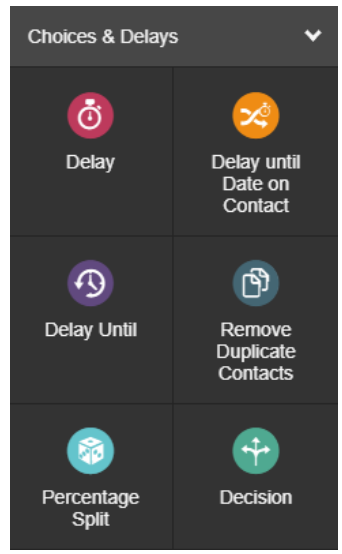


[**Note:** You will only receive the confirmation pop-up if the element has been activated or if the campaign has been saved.]





Choices and Delays

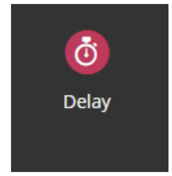


The next tab in the Creation Panel on the left side of the screen is the Choices & Delays tab. The elements appearing in this tab are different types of actions that can pause contacts from continuing through the campaign or can help determine which path contacts should follow based on specified criteria.

These elements are:

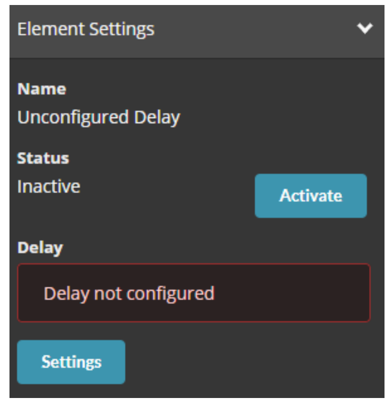
- **Delay:** This element allows you to pause a contact in the SimplyCast 360 campaign for a specific period of time before it resumes automatically.
- **Delay Until Date on Contact:** This element allows you to send contacts through the campaign at a pre-specified that is unique to each contact.
- **Delay Until:** This element allows you to pause a contact in the SimplyCast 360 campaign until a specific date is reached, then it will resume automatically.
- **Remove Duplicate Contacts:** This element allows you to prevent any contacts from proceeding any further in the campaign if they have already passed through.
- **Percentage Split:** This element allows you to send different messages to different contacts within a list based on percentages.
- **Decision:** This element allows you to create multiple options to help determine which path a contact will continue down in your campaign depending on whether they meet specific criteria when interacting with the previous elements.

Delay



The first drag-and-drop element in the Choices and Delays tab is the Delay element. This element allows you to pause a contact in the SimplyCast 360 campaign for a specific period of time before it resumes automatically.

To begin setting up this element:



- Click and drag the Delay element or double click it to add it to the canvas.
- Once you have placed the element onto the canvas and have it selected with your mouse, four additional fields will appear in the Settings Panel on the right-hand side of your screen:

  > **Name:** By default, this field will say "Unconfigured Delay" until the delay is configured. The name of the delay will automatically update to match the amount of time chosen in the Delay field below.

  > **Status:** This field is where you can activate or deactivate the element by clicking the blue or red button respectively. Activating an element means that the element will be able to be used as part of the campaign and should perform as expected.

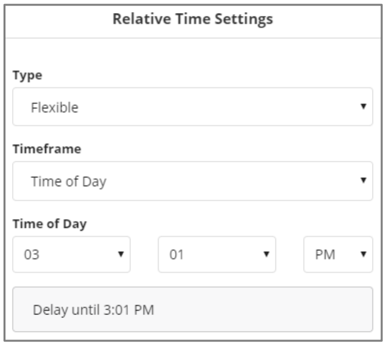
[**Note:** Keep in mind the element will not become active until you save the campaign.]

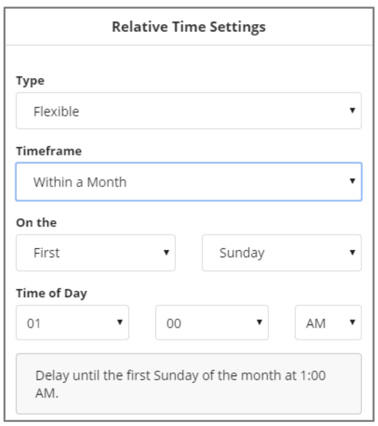
> **Delay:** This field contains two sections. The first section is a textbox which describes the length of the chosen delay. By default, this textbox will say "Delay Not Configured." The second section is a blue Settings button where you can configure the amount of time the system will pause the campaign before progressing to the next element in the campaign. Clicking this button will open the Relative Time Settings sidebar where you can choose the type of delay from the Type dropdown: Fixed Offset or Flexible.

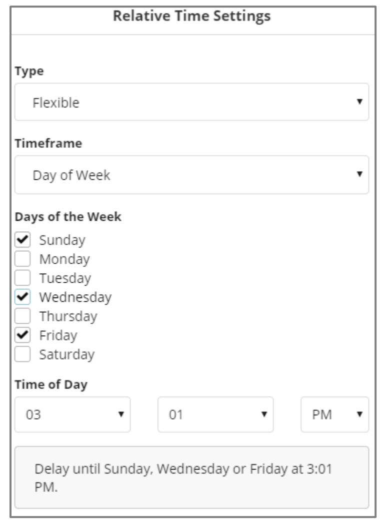
>> Fixed offset means that the delay will be a fixed amount of time before the contacts will continue their progress in the campaign. Choosing Fixed Offset as your delay type will cause the Offset field to appear. This field includes two dropdowns and a textbox. Choose your unit of time from the dropdown on the right (minutes, hours, days, weeks, or months), and in the dropdown on the left, choose the number of the selected time unit. The textbox beneath the dropdowns will describe the time delay you configured. For example, if you chose "Days" in the

dropdown on the right and "1" on the left, the textbox will explain that the delay will last one day.

>> A flexible delay means the delay can be set to customized lengths of time, rather than a specific, fixed time. Choosing Flexible as your delay type causes a Timeframe dropdown field to appear in the sidebar. From this dropdown, choose whether you want the delay to end at a specific time of day, on a day of the week, or sometime within a month. Selecting the Time of Day option means the delay will end at a selected time within the next 24 hours. Choose the time the delay will last until from the dropdown menu options in the Time of Day field set. Selecting the Day of Week option will cause a Days of the Week field to appear where you must select the day(s) of the week option(s) you wish the delay to last until. Choose the day(s) when the delay can end by checking them off. Then select the time of day the delay will end by selecting the time from the dropdown menus available in the Time of Day field set. Selecting the Within a Month option will cause an "On the" field set to appear. Here, choose the week of the month you wish the delay to last until in the first field, and in the second field select the day of the week. Choose the time of day the delay will end from the dropdown menus available. The textbox below will describe the delay interval configured for all flexible delay type options.

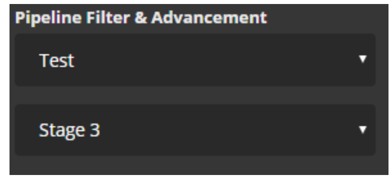




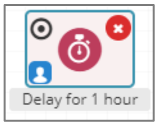


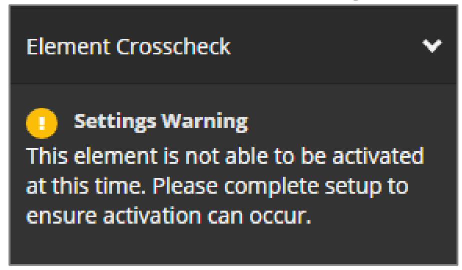
[**Note:** For example, say you selected the Day of Week option in the Timeframe dropdown Menu and chose Sunday, Wednesday, and Friday at 3:01PM in their respective fields. The textbox below the fields will indicate the delay will be in place in the campaign until Sunday, Wednesday or Friday at 3:01PM.]

>> Once you have determined your delay type and have selected the timeframe to use with your Delay element, click the blue Confirm button at the bottom of the sidebar to save your settings and close the sidebar, or click the Cancel button to close the sidebar without configuring your delay settings.

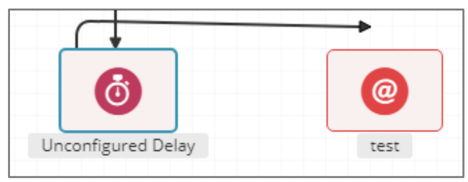


> **Pipeline Filter & Advancement:** Choose whether you would like contacts to progress through any pipelines you may have associated with the campaign. In the dropdown menu in this field, choose the pipeline you would like contacts to be added to. A second dropdown will appear to choose the stage of that pipeline contacts will be added to at this point of the campaign. If you choose to set a pipeline stage to this element, an icon will appear on the bottom left corner of the element in your campaign to indicate that contacts will move through a pipeline stage at this point in your campaign.



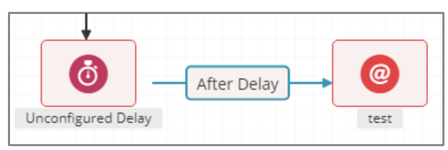


- If there is an issue with the element that needs to be resolved before the element can be activated, there will be a yellow or red exclamation point symbol in the top right corner of the element to signify this. If this is the case, when you select the element with your mouse, an additional section called Element Crosscheck will appear in the Settings Panel. The Element Crosscheck section will describe the issue with the element and provide instructions on how to resolve it.

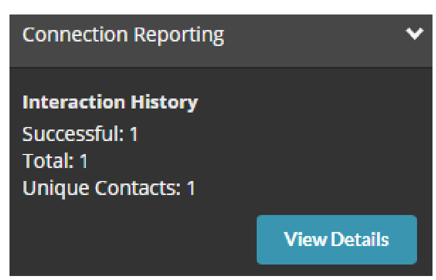


- To connect your Delay element to another element in your campaign, click the black target icon located on the top corner of the element and drag it over the element you wish to connect it to.

[**Note:** Some elements are not able to be connected to each other. For example, you cannot connect two Starting Point elements to each other, and you cannot connect a Starting Point element to the Contact Changed, Start from CRM, or Inbound API elements.]

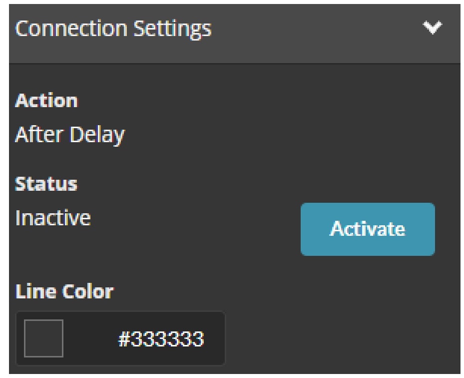


- Once a connection has been established between the Delay element and at least one other element, a textbox with the connection type will appear on the line. Click on this textbox to open two new sections in the Settings Panel, Connection Reporting and Connection Settings.



- The Connection Reporting section contains the Interaction History. When you first create the connection, it will only show that there have been no interactions. Once the connection has triggered at least once, you will see more information. Interaction History will then show the number of Successful (and Unsuccessful, if any) triggers, the Total number of triggers, and the number of Unique Contacts who have triggered the trigger.

- The View Details button, when selected, will open the Connection History Sidebar, allowing you to see the history of all the interactions associated with the element. See the section on Interaction History for more information.
-

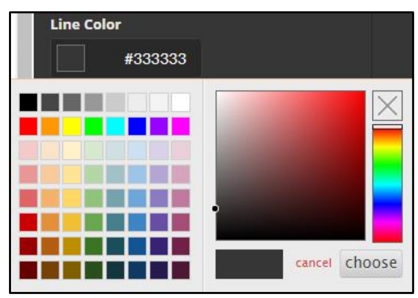


- There are four fields in the Connection Settings section. The first field is the Action field, which indicates the connection type (After Delay).
- The second field is the Description field which will display a short description for when the connection will be triggered.
- The next field is the Status field where you can activate or deactivate the connection by clicking the red or blue button respectively. Activating a connection means that the connection will be able to be used as part of the campaign and should perform as expected.

[**Note:** Keep in mind the connection will not become active until you save the campaign.]

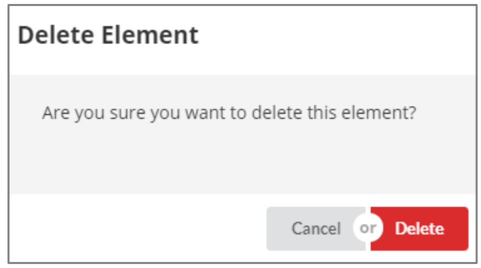
- The last field is the Line Color field where you can choose the color for that connection's line.

To choose a color:



> 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.
> Choose your desired color from the pre-set swatches on the left side of the selector dropdown or use the right side to manually choose a color.
> 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.

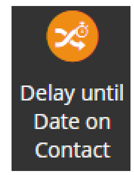
- To copy a connection, hover your mouse over the textbox appearing on the connection to show a blue button at the top left of the textbox. Copying a connection saves you from having to re-configure the settings for any additional connections requiring the same conditions, saving time. Click and drag this button to create a new connection that can be attached to a new element. All connection settings configured in the initial connection will be copied over to the new connection.



- Delete a connection by hovering over the connection's textbox and clicking the red "X" button.
- To delete the element from the campaign, hover your mouse over the element and click the red "X" button in the top right corner that appears. A pop-up window will appear asking you to confirm the deletion. Click the red Delete button to complete the deletion or Cancel to close the window without deleting the element.

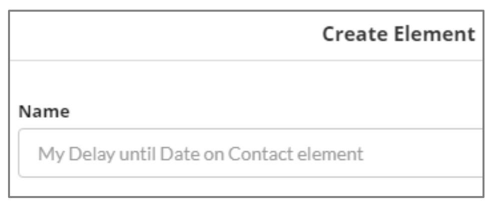
[**Note:** You will only receive the confirmation pop-up if the element has been activated or if the campaign has been saved.]

Delay Until Date on Contact



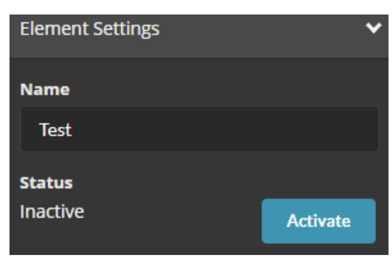
The second drag-and-drop element in the Choices & Delays tab is the Delay Until Date on Contact Element. This element allows you to send contacts through the campaign at a pre-specified that is unique to each contact.

To begin setting up this element:



- Click and drag the Delay Until Date on Contact element or double click it to add it to the canvas.
- When you place the element, a sidebar will appear with a Name field that will ask you to enter a name for the new element. Type the name into the textbox provided.
- Click the green create button to add the element and close the sidebar or click the gray Close button to close the sidebar without adding the element.

- Once you have placed the element onto the canvas and have it selected with your mouse, six additional fields will appear in the Element Settings section on the right-hand side of your screen:



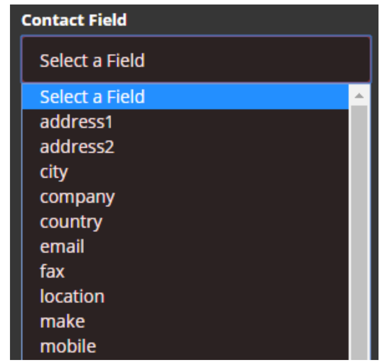
  > **Name:** This field contains the name you selected when you added the element to the canvas. To change the name of your element, edit the name in the textbox provided.

  > **Status:** This field is where you can activate or deactivate the element by clicking the blue or red button respectively. Activating a connection

means that the connection will be able to be used as part of the campaign and should perform as expected.

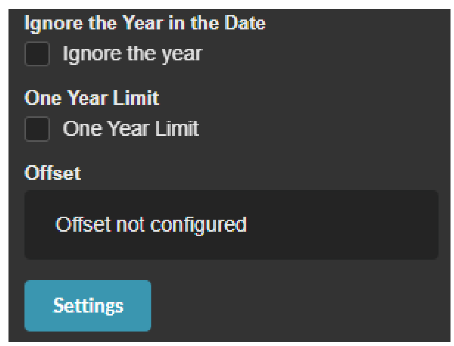
[**Note:** Keep in mind the element will not become active until you save the campaign.]

> **Contact Field:** This field lets you choose which CRM field the element will pull a date from. Select the desired field from the dropdown menu provided. This list will include all available CRM fields, including any custom fields you created.



[**Note:** It is recommended you use the Date field with this element. This field differs from the Date/Time field in the sense that the Date/Time field requires that the information in the contact profile matches with both a specified date and time whereas the Date field only looks at a specified date.]

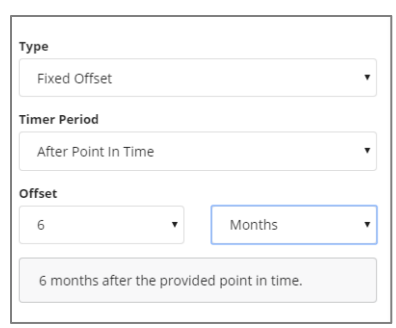
> **Ignore the Year in the Date:** By default, the system will not ignore the year in the selected date, meaning the element could potentially be triggered annually on the same date. If you would like to make sure the year is included to ensure the element is triggered only once click the "Ignore the Year" checkbox in the Settings Panel.



> **One Year Limit:** Checking this box will impose a one-year limit on the dates that apply to this element – the system will ignore any dates that are over a year past the current date. This checkbox will only appear if the "Ignore the Year" checkbox is not selected.

> **Offset:** This field contains a blue Settings button that you can use to determine when the contact will progress in the campaign after the date specified in their profile. Clicking this button will open a sidebar where you must choose when the offset will occur. Select a type of offset to use from the Type dropdown: Fixed Offset or Flexible.

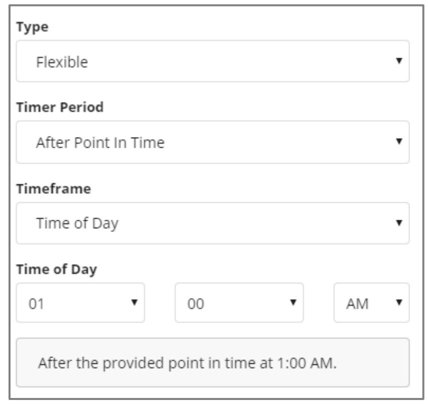
>> Choosing Fixed Offset as your offset type will cause the Timer Period and Offset fields to appear. The Timer Period field refers to whether the offset will occur before or after the point in time selected from the contact's CRM field. Select either option from the dropdown provided. The Offset field includes two dropdowns and a textbox. Choose a unit of time from the dropdown on the right (hours, days, weeks, or months), and in the dropdown on the left, choose the number of

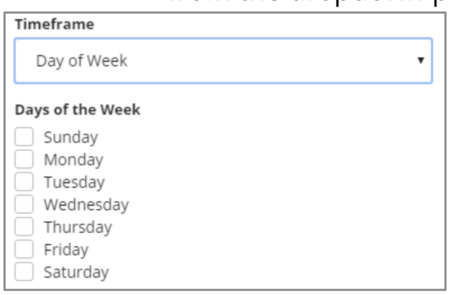


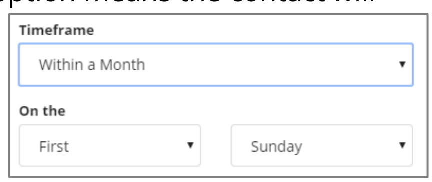
the selected time unit you would like the offset from the selected date. The textbox beneath the dropdowns will describe the offset interval you configured.

[**Note:** For example, if you selected "After Point in Time" in the Timer Period field, and then select "6" and "Months" in the Offset field, the textbox will explain that the contact will progress to the next step in the campaign six months after the date specified in their profile.]

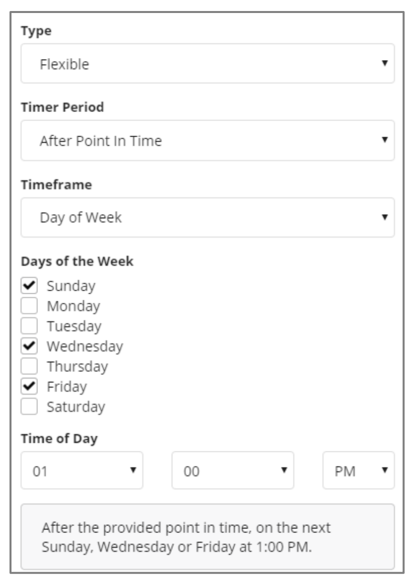
>> Choosing Flexible as your schedule type causes the Timer Period, Timeframe, and Time of Day fields to appear. The Timer Period field refers to whether the offset will occur before or after the point in time selected from the contact's CRM field. Select either option from the dropdown provided. The Timeframe field refers to whether the offset will occur at a specific time of day, on a specific day of the week, or on a specific day in the month. Selecting the Time of Day option means the contact will progress to the next step in the campaign within 24 hours of the specified date in their profile. Choose the time desired from the dropdown menu options in the Time of Day field set.







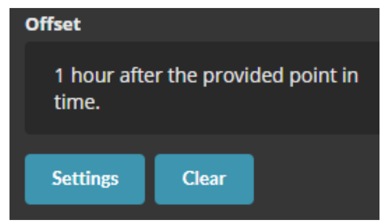
Selecting the Day of Week option will cause an additional Days of the Week section to occur where you must select one or multiple days of the week (Sunday through Saturday) for the offset to occur. This means contacts will progress to the next step of the campaign on the closest selected day following the date specified in their profile (even if it is the same day). Choose the day(s) when the offset can occur by checking them off. Then select the time of day the offset will occur by selecting the time from the dropdown menus available in the Time of Day field set. Choosing the Within a Month option means that contacts can be set to progress to the next stage of the campaign at a set time of the month. Selecting this option will cause an additional "On the" field set to appear with two dropdown menus. The first dropdown lets you



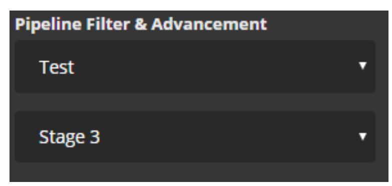
choose the week of the month when you want the contact to progress to the next step of the campaign, and the second dropdown refers to a specific day within the week you selected. Then, choose the time of day from the Time of Day dropdown menus provided. The textbox below these options will describe the delay interval configured for all flexible delay type options.

[**Note:** For example, say you selected After Point in Time offset type, the Day of Week option in the Timeframe dropdown menu, and chose Sunday, Wednesday, and Friday at 1:00PM in their respective fields. The textbox below the fields will indicate the contact will proceed to the next step in the campaign on the next Sunday, Wednesday, or Friday at 1:00PM after the provided point in time.]

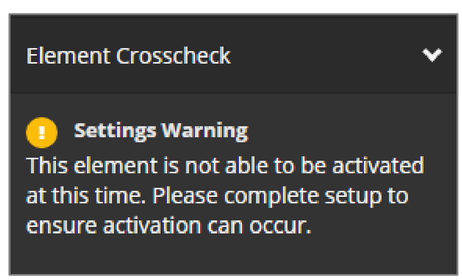
>> Once you have determined the offset time, click the blue Confirm button to save your settings and close the sidebar, or click the Cancel button to close the window without configuring your offset. The offset time will be displayed in the Offset section in the Settings Panel and a blue Clear button will appear beside the blue Settings button. Click Clear to remove the offset time configuration.

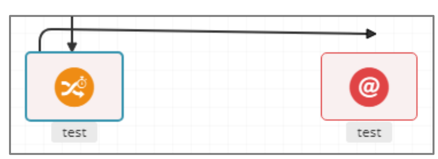


> **Pipeline Filter & Advancement:** Choose whether you would like contacts to progress through any pipelines you may have associated with the campaign. In the dropdown menu in this field, choose the pipeline you would like contacts to be added to. A second dropdown will appear to choose the stage of that pipeline contacts will be added to at this point of the campaign. If you choose to set a pipeline stage to this element, an icon will appear on the bottom left corner of the element in your campaign to indicate that contacts will move through a pipeline stage at this point in your campaign.



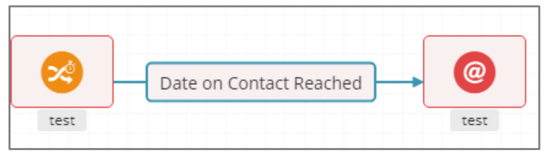
- If there is an issue with the element that needs to be resolved before the element can be activated, there will be a yellow or red exclamation point symbol in the top right corner of the element to signify this. If this is the case, when you select the element with your mouse, an additional section called Element Crosscheck will appear in the Settings Panel. The Element Crosscheck section will describe the issue with the element and provide instructions on how to resolve it.



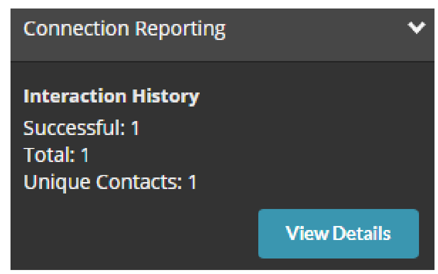


- To connect your Delay Until Date on Contact element to another element in your campaign, click the black target icon located on the top corner of the element and drag it over the element you wish to connect it to.

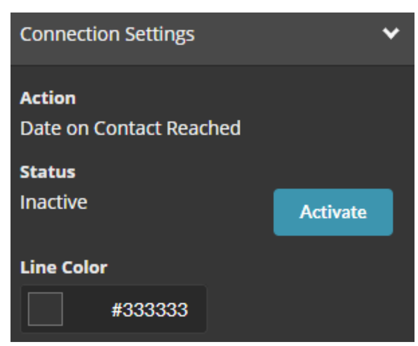
[**Note:** Some elements are not able to be connected to each other. For example, you cannot connect two Starting Point elements to each other, and you cannot connect a Starting Point element to the Contact Changed, Start from CRM, or Inbound API elements.]



- Once a connection has been established between the Delay Until Date on Contact element and at least one other element, a textbox with the connection type will appear on the line. Click on this textbox to open two new sections in the Settings Panel, Connection Reporting and Connection Settings.



- The Connection Reporting section contains the Interaction History. When you first create the connection, it will only show that there have been no interactions. Once the connection has triggered at least once, you will see more information. Interaction History will then show the number of Successful (and Unsuccessful, if any) triggers, the Total number of triggers, and the number of Unique Contacts who have triggered the trigger.
- The View Details button, when selected, will open the Connection History Sidebar, allowing you to see the history of all the interactions associated with the element. See the section on Interaction History for more information.
-

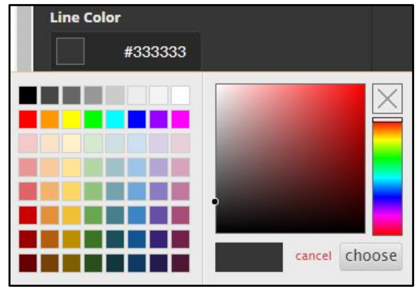


- There are four fields in the Connection Settings section. The first field is the Action field, which indicates the connection type (Date on Contact Reached).
- The second field is the Description field which will display a short description for when the connection will be triggered.
- The next field is the Status field where you can activate or deactivate the connection by clicking the blue or red button respectively. Activating a connection means that the connection will be able to be used as part of the campaign and should perform as expected.

[**Note:** Keep in mind the connection will not become active until you save the campaign.]

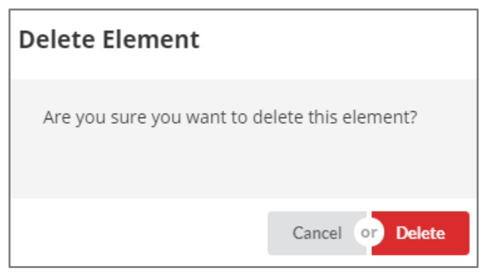
- The last field is the Line Color field where you can choose the color for that connection's line.

To choose a color:



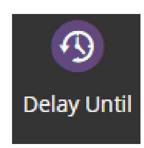
> Click on the color square in the field and a color selector will appear or enter the hex code of the color in the field next to the square.
> Choose your desired color from the pre-set swatches on the left side of the selector dropdown or use the right side to manually choose a color.
> Click the Choose 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.

- To copy a connection, hover your mouse over the textbox appearing on the connection to show a blue button at the top left of the textbox. Copying a connection saves you from having to re-configure the settings for any additional connections requiring the same conditions, saving time. Click and drag this button to create a new connection that can be attached to a new element. All connection settings configured in the initial connection will be copied over to the new connection.
- Delete a connection by hovering over the connection's textbox and clicking the red "X" button.
- To delete the element from the campaign, hover your mouse over the element and click the red "X" button in the top right corner that appears. A pop-up window will appear asking you to confirm the deletion. Click the red Delete button to complete the deletion or Cancel to close the window without deleting the element.



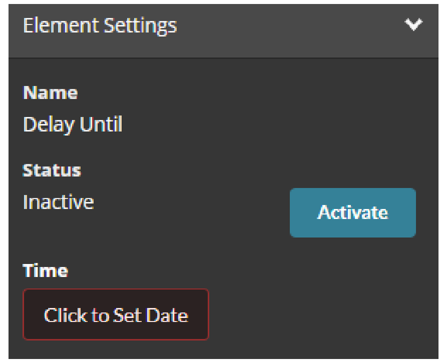
[**Note:** You will only receive the confirmation pop-up if the element has been activated or if the campaign has been saved.]

Delay Until



The third drag-and-drop element in the Choices & Delays tab is the Delay Until element. This element allows you to pause a contact in the 360 campaign until a specific date is reached, then it will resume automatically.

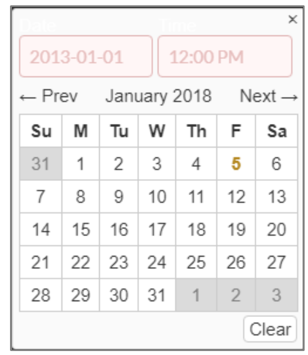
To begin setting up this element:



- Click and drag the Delay Until element or double click it to add it to the canvas.
- Once you have placed the element onto the canvas and have it selected with your mouse, five additional fields will appear in the Element Settings section in the Settings Panel:

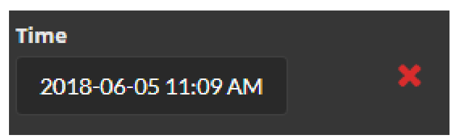
  > **Name:** The name you selected when you added the element to the canvas.

  > **Status:** Activate or deactivate the element by clicking the blue or red button respectively. Activating an element means that the element will be able to be used as part of the campaign and should perform as expected.



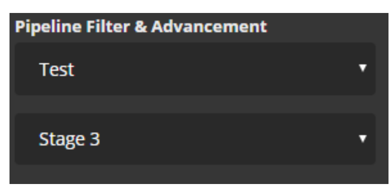
[**Note:** Keep in mind the element will not become active until you save the campaign.]

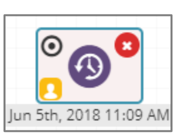
  > **Time:** Choose the date and time the system will delay the campaign until. Click on the textbox in this field and a calendar dropdown will appear to select when the campaign will be delayed until. If the time is already set, click the textbox containing the set time to change it if desired. Click anywhere outside of the dropdown or the "X" button in the top right corner or press the Enter button on your keyboard to close the calendar. To clear a set time, click the red "X" located to the right of the Time field.

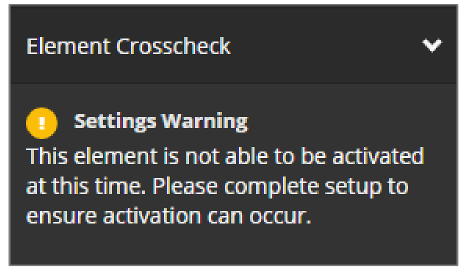


  > **Passthrough:** This field contains a checkbox that you can click if you would like the system to ignore this element if the set date has already passed and proceed through the campaign without delay.

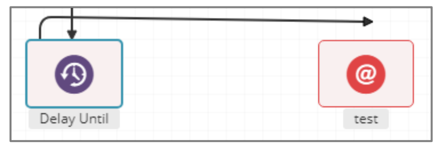
  > **Pipeline Filter & Advancement:** Choose whether you would like contacts to progress through any pipelines you may have associated with the campaign. In the dropdown menu in this field, choose the pipeline you would like contacts to be added to. A second dropdown will appear to choose the stage of that pipeline contacts will be added to at this point of the campaign. If you choose to set a pipeline stage to this element, an icon will appear on the bottom left corner of the element in your campaign to indicate that contacts will move through a pipeline stage at this point in your campaign.





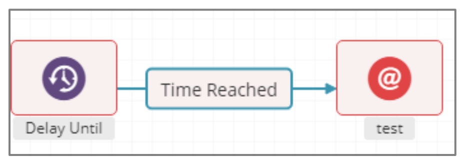


- If there is an issue with the element that needs to be resolved before the element can be activated, there will be a yellow or red exclamation point symbol in the top right corner of the element to signify this. If this is the case, when you select the element with your mouse, an additional section called Element Crosscheck will appear in the Settings Panel. The Element Crosscheck section will describe the issue with the element and provide instructions on how to resolve it.

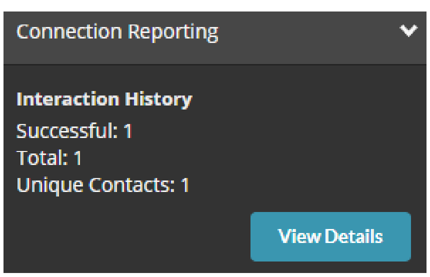


- To connect your Delay Until element to another element in your campaign, click the black target icon located on the top corner of the element and drag it over the element you wish to connect it to.

[**Note:** Some elements are not able to be connected to each other. For example, you cannot connect two Starting Point elements to each other, and you cannot connect a Starting Point element to the Contact Changed, Start from CRM, or Inbound API elements.]

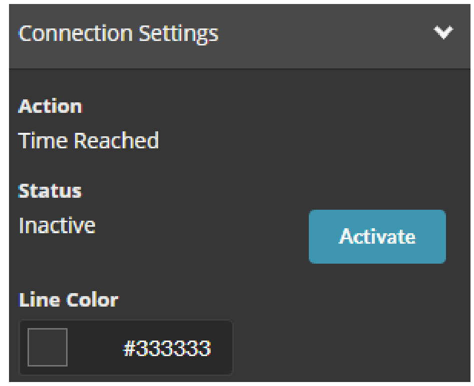


- Once a connection has been established between the Delay Until element and at least one other element, a textbox with the connection type will appear on the line. Click on this textbox to open two new sections in the Settings Panel, Connection Reporting and Connection Settings.



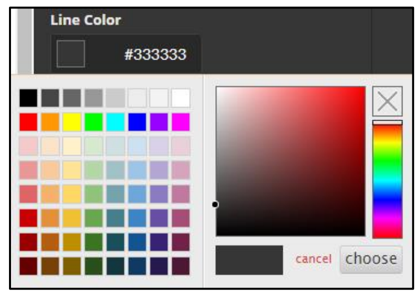
- The Connection Reporting section contains the Interaction History. When you first create the connection, it will only show that there have been no interactions. Once the connection has triggered at least once, you will see more information. Interaction History will then show the number of Successful (and Unsuccessful, if any) triggers, the Total number of triggers, and the number of Unique Contacts who have triggered the trigger.
- The View Details button, when selected, will open the Connection History Sidebar, allowing you to see the history of all the interactions associated with the element. See the section on Interaction History for more information.

- The first Connection Settings field is the Action field, which indicates the connection type (Time Reached).
- The second field is the Description field which will display a short description for when the connection will be triggered.
- The next field is the Status field where you can activate or deactivate the connection by clicking the blue or red button respectively. Activating a connection means that the connection will be able to be used as part of the campaign and should perform as expected.



[**Note:** Keep in mind the connection will not become active until you save the campaign.]

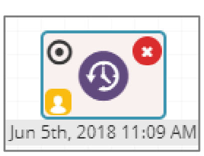
- The last field is the Line Color field where you can choose the color for that connection's line.

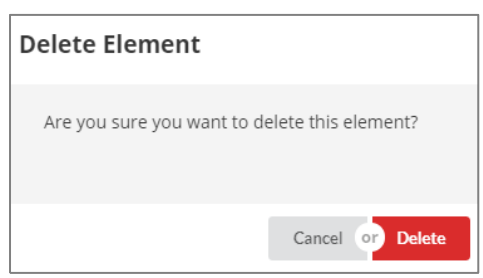


To choose a color:

> 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.
>
> Choose your desired color from the pre-set swatches on the left side of the selector dropdown or use the right side to manually choose a color.
>
> 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.

- To copy a connection, hover your mouse over the textbox appearing on the connection to show a blue button at the top left of the textbox. Copying a connection saves you from having to re-configure the settings for any additional connections requiring the same conditions, saving time. Click and drag this button to create a new connection that can be attached to a new element. All connection settings configured in the initial connection will be copied over to the new connection.
- Delete a connection by hovering over the connection's textbox and clicking the red "X" button.
- To delete the element from the campaign, hover your mouse over the element and click the red "X" button in the top right corner that appears. A pop-up window will appear asking you to confirm the deletion. Click the red

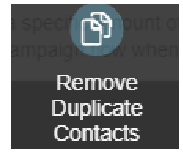




Delete button to complete the deletion or Cancel to close the window without deleting the element.

[**Note:** You will only receive the confirmation pop-up if the element has been activated or if the campaign has been saved.]

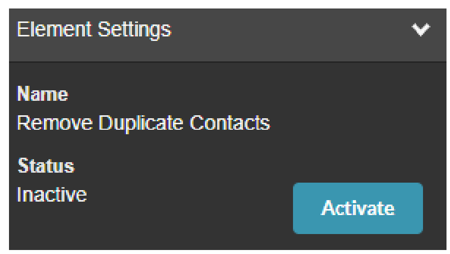
Remove Duplicate Contacts



The fourth drag-and-drop element in the Choices & Delays tab is the Remove Duplicate Contacts element. This element allows you to prevent any contacts from proceeding any further in the campaign if they have already passed through.

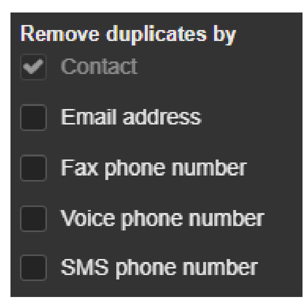
To begin setting up this element:

- Click and drag the Remove Duplicate Contacts element or double click it to add it to the canvas.
- Once you have placed the element onto the canvas and have it selected with your mouse, four additional fields will appear in the Element Settings section in the Settings Panel on the right-hand side of your screen:

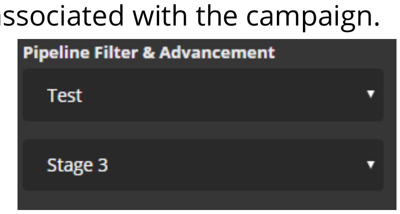


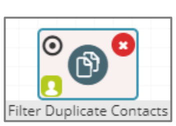
> **Name:** This field contains the name for the element.
> **Status:** This field is where you can activate or deactivate the element by clicking the blue or red button respectively. Activating an element means that the element will be able to be used as part of the campaign and should perform as expected.

[**Note:** Keep in mind the element will not become active until you save the campaign.]

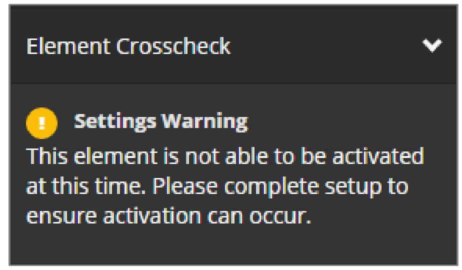


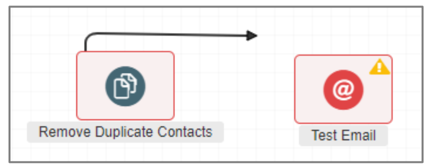
> **Remove Duplicates By:** This field lets you choose the information you want to filter out and remove duplicate contacts by. You can filter contacts based on email address, fax number, voice phone number, and SMS phone number. To select one or more of these options, click the checkbox beside the respective option.
> **Pipeline Filter & Advancement:** Choose whether you would like contacts to progress through any pipelines you may have associated with the campaign. In the dropdown menu in this field, choose the pipeline you would like contacts to be added to. A second dropdown will appear to choose the stage of that pipeline contacts will be added to once they





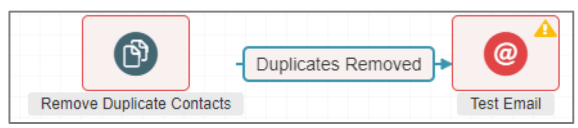
reach this point of the campaign. If you choose to set a pipeline stage to this element, an icon will appear on the bottom left corner of the element in your campaign to indicate that contacts will move through a pipeline stage at this point in your campaign.



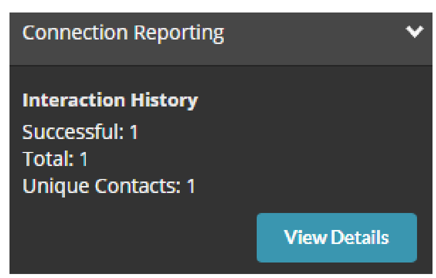


- If there is an issue with the element that needs to be resolved before the element can be activated, there will be a yellow or red exclamation point symbol in the top right corner of the element to signify this. If this is the case, when you select the element with your mouse, an additional section called Element Crosscheck will appear in the Settings Panel. The Element Crosscheck section will describe the issue with the element and provide instructions on how to resolve it.
- To connect your Remove Duplicate Contacts element to another element in your campaign, click the black target icon located on the top corner of the element and drag it over the element you wish to connect it to.

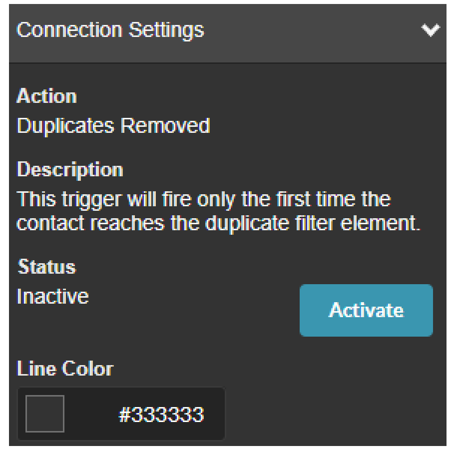
[**Note:** Some elements are not able to be connected to each other. For example, you cannot connect two Starting Point elements to each other, and you cannot connect a Starting Point element to the Contact Changed, Start from CRM, or Inbound API elements.]



- Once a connection has been established between the Remove Duplicate Contacts element and at least one other element, a textbox with the connection type will appear on the line: Duplicates Removed. Click on this textbox to open two new sections in the Settings Panel, Connection Reporting and Connection Settings.



- The Connection Reporting section contains the Interaction History. When you first create the connection, it will only show that there have been no interactions. Once the connection has triggered at least once, you will see more information. Interaction History will then show the number of Successful (and Unsuccessful, if any) triggers, the Total number of triggers, and the number of Unique Contacts who have triggered the trigger.
- The View Details button, when selected, will open the Connection History Sidebar, allowing you to see the history of all the interactions associated with the element. See the section on Interaction History for more information.

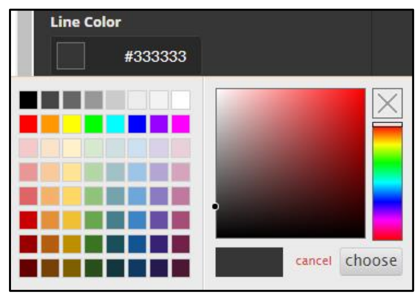


- The first Connection Settings field is the Action field, which indicates the connection type (Duplicates Removed).
- The second field is the Description field which will provide a short description of the action.
- The third field is the Status field where you can activate or deactivate the connection by clicking the blue or red button respectively. Activating a connection means that the connection will be able to be used as part of the campaign and should perform as expected.

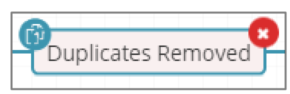
[**Note:** Keep in mind the connection will not become active until you save the campaign.]

- The third line is the Line Color field where you can choose the color for that connection's line.

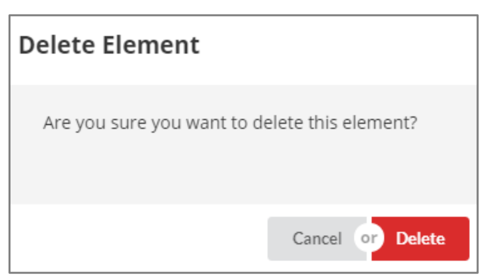
To choose a color:

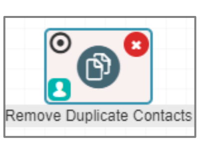


> Click on the color square in the field and a color selector will appear or enter the hex code of the color in the field next to the square.
> Choose your desired color from the pre-set swatches on the left side of the selector dropdown or use the right side to manually choose a color.
> Click the Choose 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.



- To copy a connection, hover your mouse over the textbox appearing on the connection to show a blue button at the top left of the textbox. Copying a connection saves you from having to re-configure the settings for any additional connections requiring the same conditions, saving time. Click and drag this button to create a new connection that can be attached to a new element. All connection settings configured in the initial connection will be copied over to the new connection.
- Delete a connection by hovering over the connection's textbox and clicking the red "X" button.
- To delete the element from the campaign, hover your mouse over the element and click the red "X" button in the top right corner that appears. A pop-up window will

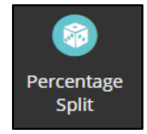




appear asking you to confirm the deletion. Click the red Delete button to complete the deletion or Cancel to close the window without deleting the element.

[**Note:** You will only receive the confirmation pop-up if the element has been activated or if the campaign has been saved.]

Percentage Split

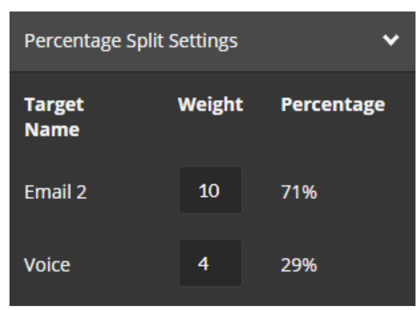


The fifth drag-and-drop element in the Choices & Delays tab is the Percentage Split element. This element allows you to send different messages to different contacts progressing through the campaign based on percentages.

To begin setting up a percentage split:

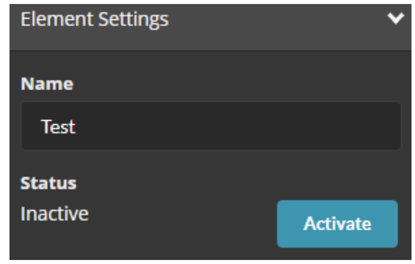
- Click and drag the Percentage Split element or double click it to add it to the canvas.
- When you place the element, a sidebar will appear with a Name field that will ask you to enter a name for the new element. Type the name into the textbox provided.

- Click the green Create button to add the element and close the sidebar or click the gray Close button to close the sidebar without adding the element.
- Once you have placed the element onto the canvas and have it selected with your mouse, four additional fields will appear in the Settings Panel:



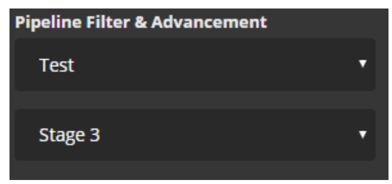
> **Percentage Split Settings:** This field can be edited once the element is connected to at least one other element. It allows you to determine the weighting allocated to each element the Percentage Split element is connected to. Based on the weighting you choose, the percentage of contacts that go down a certain path in the campaign will update automatically and be displayed in this field. There are three information columns in this section that will contain data once an element has been connected to the Percentage Split element. The Target Name column will display the name(s) of the Campaign element(s) connected to the Percent Split element; the Weight column will be where you can determine the relative value of each of the elements connected to the Percentage Split element in order

to apply the percentage that will appear in the third column. This will be explained a little later in the setup process.

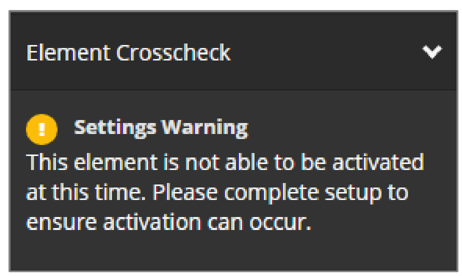


> **Name:** This field contains the name you selected when you added the element to the canvas. To change the name of your element, edit the name in the textbox provided.
> **Status:** This field is where you can activate or deactivate the element by clicking the blue or red button respectively. Activating an element means that the element will be able to be used as part of the campaign and should perform as expected.

[**Note:** Keep in mind the element will not become active until you save the campaign.]



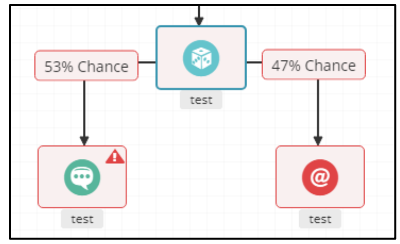
> **Pipeline Filter & Advancement:** Choose whether you would like contacts to progress through any pipelines you may have. In the dropdown menu in this field, choose the pipeline you would like contacts to be added to. A second dropdown will appear to choose the stage of that pipeline contacts will be added to at this point of the campaign. If you choose to set a pipeline stage to this element, an icon will appear on the bottom left corner of the element in your campaign to indicate that contacts will move through a pipeline stage at this point in your campaign.



- If there is an issue with the element that needs to be resolved before the element can be activated, there will be a yellow or red exclamation point symbol in the top right corner of the element to signify this. If this is the case, when you select the element with your mouse, an additional section called Element Crosscheck will appear in the Settings Panel. The Element Crosscheck section will describe the issue with the element and provide instructions on how to resolve it.

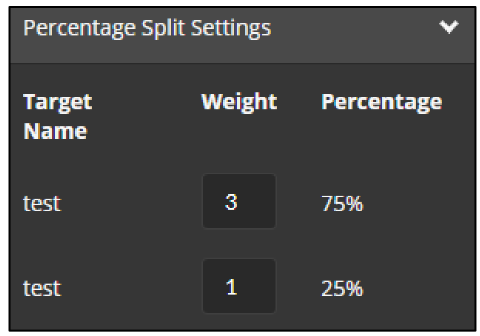
- To connect your Percentage Split element to another element in your campaign, click the black target icon located on the top corner of your element and drag it over to the element you wish to connect it to.

[**Note:** Some elements are not able to be connected to each other. For example, you cannot connect two Starting Point elements to each other, and you cannot connect a Starting Point element to the Contact Changed, Start from CRM, or Inbound API elements.]



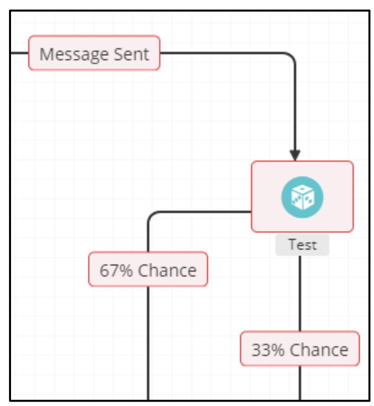
- Once a connection has been established between the Percentage Split element and at least one other element, a textbox will appear on the line. Click on this textbox to open the Settings Panel. You will see the Percentage Split Settings section, the Connection Reporting section, and a new Connection Settings section. The Percentage Split Settings section will now have fields in it for each of the elements connected to the percentage split element.

To set up the percentage split:


Percentage Split Settings

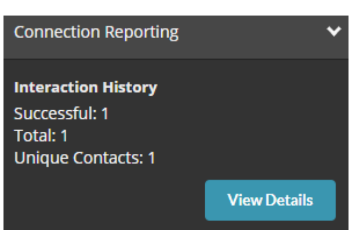
Target Name	Weight	Percentage
test	3	75%
test	1	25%

> If the Percentage Split element is only connected to one other element, you can only set the percentage to 0% or 100%. However, if the element is connected to multiple elements, you may adjust the percentage of each element as you like by entering a number in the Weight field for each connection. When a Weight number (value indicating the relative importance of each connection) is assigned, the system will automatically calculate the difference between those numbers in percentages with the total being 100% between them all.



[**Note:** For example, if you connect the Percentage Split element to two other elements and give each connection a Weight of 1, the split between the two will be 50/50 meaning there is a 50% chance of contacts going down each path. However, if you give the first connection a weight of 1 and the second a weight of 2, the chances of contacts going down the second path should be about double that of the first connection. So, in this case, contacts will have a 33% chance of going down the first path and a 67% chance of going down the second path.]

> Once the Percentage Split Settings have been configured, the line connecting the Percentage Split element and each other element will contain a textbox displaying the percentage allocated to that connection.



- The Connection Reporting section contains the Interaction History. When you first create the connection, it will only show that there have been no interactions. Once the connection has triggered at least once, you will see more information. Interaction History will then show the number of Successful (and

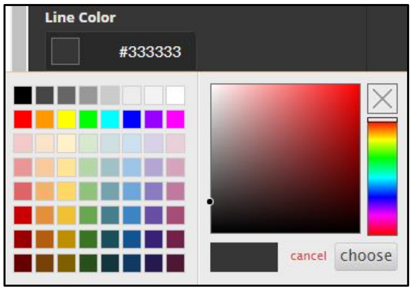
Unsuccessful, if any) triggers, the Total number of triggers, and the number of Unique Contacts who have triggered the trigger.

- The View Details button, when selected, will open the Connection History Sidebar, allowing you to see the history of all the interactions associated with the element. See the section on Interaction History for more information.
- The first field in the Connection Settings section is the Action field, which indicates the connection type (Percentage Split).
- The second field is the Description field which will display a short description for when the connection will be triggered.
- The next field is the Status field where you can activate or deactivate the connection by clicking the blue or red button respectively. Activating a connection means that the connection will be able to be used as part of the campaign and should perform as expected.

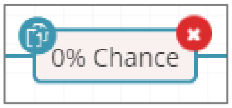
[**Note:** Keep in mind the connection will not become active until you save the campaign.]

- The last field is the Line Color field where you can choose the color for that connection's line.

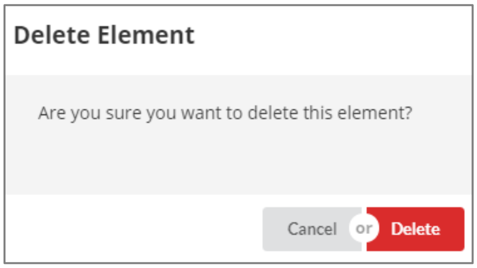
To choose a color:



> 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.
> Choose your desired color from the pre-set swatches on the left side of the selector dropdown or use the right side to manually choose a color.
> 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.



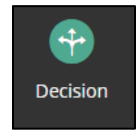
- To copy a connection, hover your mouse over the textbox appearing on the connection to show a blue button at the top left of the textbox. Copying a connection saves you from having to re-configure the settings for any additional connections requiring the same conditions, saving time. Click and drag this button to create a new connection that can be attached to a new element. All connection settings configured in the initial connection will be copied over to the new connection.
- Delete a connection by hovering over the connection's textbox and clicking the red "X" button.



- To delete the element from the campaign, hover your mouse over the element and click the red "X" button in the top right corner that appears. A pop-up window will appear asking you to confirm the deletion. Click the red Delete button to complete the deletion or Cancel to close the window without deleting the element.

[**Note:** You will only receive the confirmation pop-up if the element has been activated or if the campaign has been saved.]

Decision

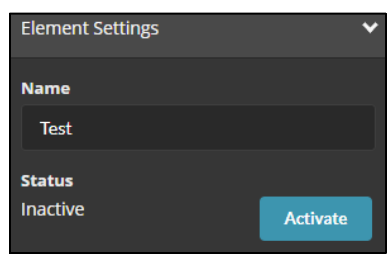


The sixth drag-and-drop element in the Choices & Delays tab is the Decision element. This element allows you to create multiple options to help determine which path a contact will continue down in your campaign depending on whether they meet specific criteria when interacting with the previous elements.

To begin setting up this element:

- Click and drag the Decision element or double click it to add it to the canvas.
- When you place the element, a sidebar will appear with a Name field that will ask you to enter a name for the new element. Type the name into the textbox provided.
- Click the green Create button to add the element and close the sidebar or click the gray Close button to close the sidebar without adding the element.

- Once you have placed the element onto the canvas and have it selected with your mouse, three additional fields will appear in the Element Settings section on the right-hand side of your screen:

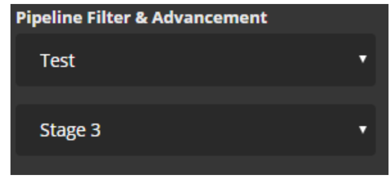


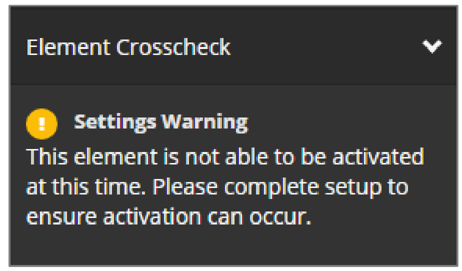
  > **Name:** This field contains the name you selected when you added the element to the canvas. To change the name of your element, edit the name in the textbox provided.

  > **Status:** This field is where you can activate or deactivate the element by clicking the blue or red button respectively. Activating an element means that the element will be able to be used as part of the campaign and should perform as expected.

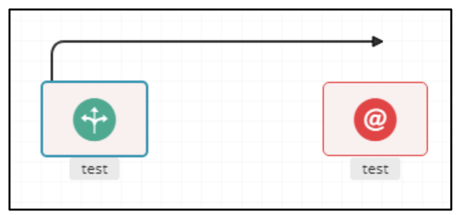
[**Note:** Keep in mind the element will not become active until you save the campaign.]

> **Pipeline Filter & Advancement:** Choose whether you would like contacts to progress through any pipelines you may have associated with the campaign. In the dropdown menu in this field, choose the pipeline you would like contacts to be added to. A second dropdown will appear to choose the stage of that pipeline contacts will be added to at this point of the campaign. If you choose to set a pipeline stage to this element, an icon will appear on the bottom left corner of the element in your campaign to indicate that contacts will move through a pipeline stage at this point in your campaign.



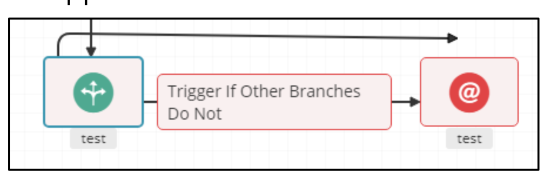


- If there is an issue with the element that needs to be resolved before the element can be activated, there will be a yellow or red exclamation point symbol in the top right corner of the element to signify this. If this is the case, when you select the element with your mouse, an additional section called Element Crosscheck will appear in the Settings Panel. The Element Crosscheck section will describe the issue with the element and provide instructions on how to resolve it.
- To connect your Decision element to another element in your campaign, which will allow for you to configure the decision settings for this path a contact could follow, click the black target icon located on the top corner of your element and drag it over to the element you wish to connect it to.

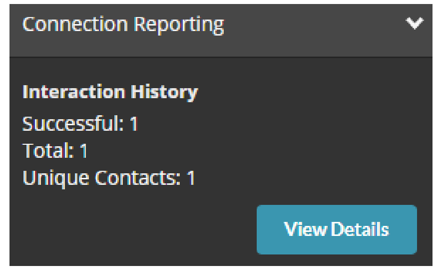


[**Note:** Some elements are not able to be connected to each other. For example, you cannot connect two Starting Point elements to each other, and you cannot connect a Starting Point element to the Contact Changed, Start from CRM, or Inbound API elements.]

- Once a connection has been established between the Decision element and at least one other element, a textbox with the connection type will appear on the line. Click on this textbox to open two new sections in the Settings Panel, Connection Reporting and Connection Settings.

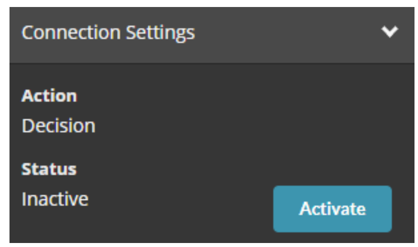


- The Connection Reporting section contains the Interaction History. When you first create the connection, it will only show that there have been no interactions. Once the connection has triggered at least once, you will see more information. Interaction History will then show the number of Successful (and Unsuccessful, if any) triggers, the Total number of triggers, and the number of Unique Contacts who have triggered the trigger.



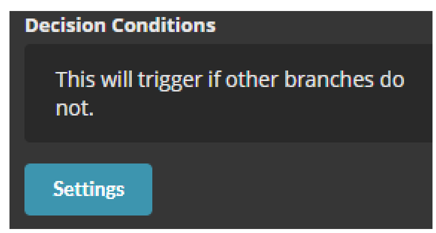
- The View Details button, when selected, will open the Connection History Sidebar, allowing you to see the history of all the interactions associated with the element. See the section on Interaction History for more information.

- The first field in this section is the Action field, which indicates the connection type (Decision).
- The second field is the Description field which will display a short description for when the connection will be triggered.
- The next field is the Status field where you can activate or deactivate the connection by clicking the blue or red button respectively. Activating a connection means that the connection will be able to be used as part of the campaign and should perform as expected.



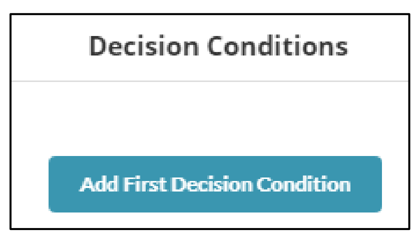
[**Note:** Keep in mind the connection will not become active until you save the campaign.]

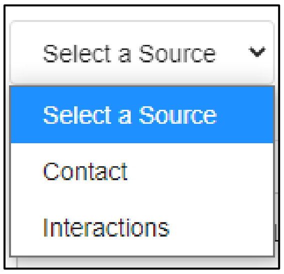
- The last field is the Decision Conditions field, which describes the condition under which the decision is made and allows you to adjust the decision settings. Click the blue Settings button to change the decision's settings. Clicking this button will cause a sidebar to appear.



From here:

> Click the blue Add First Decision Condition button located at the top of the sidebar.
> A dropdown field will appear where you are asked to choose one of two data sources (where the system will pull the decision information from):





>> **Contact:** This option refers to any basic information found in the columns of a contact's profile in the CRM.
>> **Interactions:** This option refers to any recorded actions a contact has taken, such as how they interact with campaigns and the content within them (links, clicks, score, etc.).

> If you chose Contact as your data source, a new dropdown field will appear to the right of the Data Source field where you must choose the CRM field the system will pull the necessary information from to determine whether the contact should continue down this decision path in the campaign.

There are 34 default options in this menu:

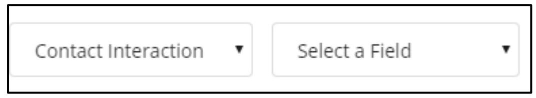
Address 1	Email_optin	Modified
Address 2	Email_sendable	Name
City	Email_unsubscribe	Phone
Company	Email_valid	Phone_sendable
Country	Fax	Phone_valid
Created	Fax_sendable	Postal Code/ZIP
Email	Fax_valid	Preferred_method
Email_hard_bounce	Location	Province/State
Email_last_open	Mobile	Salutation
Email_last_send	Mobile_sendable	Source
Email_last_softbounce	Mobile_valid	Title
		Twitter

[**Note:** If your account has added any custom columns to the CRM, these columns will also appear in this list.]

> Once you have chosen a CRM field, a third field will appear where you are asked to choose a data type (the specific format the data is stored as). There are five options available in the dropdown menu depending on the column selected:

>> **Time:** The data is stored in time format.
>> **Text:** The data is stored in text format.

>> **Number:** The data is stored in number format.
>> **Boolean:** The data is stored has either a true or false value.
>> **Region:** The data is stored as a geographical area on a map (Refer to the *SimplyCast Blueprints & Map User Guide* for more information about regions)



> Alternatively, if you have chosen Interactions as your data source, a new field will appear to the right of the Data Source field where you are asked to choose the information field the system will pull the necessary information from to determine the path the contact should follow in your campaign.

There are 23 default options in this field:

Account Manager
Acquisition Cost
Ad Campaign
Ad Content
Ad Medium
Ad Source
Alternate Contact
Email Link Clicks
Email Opens
Email Sends
Fax Deliveries
Fax Sends
Link Clicks
Potential Value
Purchase Amount
Score
Search Term
Site Category
SMS Deliveries
SMS Sends
Tags
Voice Deliveries
Voice Sends

[**Note:** Any pipelines or custom fields you have created will also appear as options in this dropdown menu.]

> Once you have chosen either the data type and CRM field for your Contact data source or the information field for your Interactions data source, an Operation field will appear to the right of the others where you are asked to choose a means of comparison. There are 16 possible comparison options, depending on the field or data you are looking at:

>> **Greater Than/Equals:** This option is available with every CRM field option for the Contact data source's Time and Number data types as well as every Interactions data source option except for Tags, Account Manager, Ad Source, Ad Campaign, Ad Content, Ad Medium, Search Term, and Site Category.
>> **Less Than/Equals:** This option is available with every field option for the Contact data source's Time and Number data types as well as every Interaction's data source option except for Tags, Account Manager, Ad Source, Ad Campaign, Ad Content, Ad Medium, Search Term, and Site Category.

>> **Greater Than:** This option is available with every CRM field option for the Contact data source's Time and Number data types as well as every Interaction data source option except for Tags, Account Manager, Ad Source, Ad Campaign, Ad Content, Ad Medium, Search Term, and Site Category.

>> **Less Than:** This option is available with every field option for the Contact data source's Time and Number data types as well as every Interactions data source option, except for Tags, Account Manager, Ad Source, Ad Campaign, Ad Content, Ad Medium, Search Term, and Site Category.

>> **Equals:** This option is available with every CRM field option for the Contact data source's data types as well as every Interaction data source option except for Tags, Ad Source, Ad Campaign, Ad Content, Ad Medium, Search Term, and Site Category.

>> **Not Equal:** This option is available with every CRM field option for the Contact data source's data types as well as every Interaction data source option except for Tags, Ad Source, Ad Campaign, Ad Content, Ad Medium, Search Term, and Site Category.

>> **Contains:** This option is available with every field for the Contact data source's Text data type.

>> **Does Not Contain:** This option is available with every field for the Contact data source's Text data type.

>> **Is In Group:** This option is available for the Interactions data source's Tags, Ad Source, Ad Medium, Ad Campaign, Ad Content, Search Term, and Site Category fields.

>> **Is Not In Group:** This option is available for the Interactions data source's Tags, Ad Source, Ad Medium, Ad Campaign, Ad Content, Search Term, and Site Category fields.

>> **Starts With:** This option is available with every field for the Contact data source's Text data type.

>> **Ends With:** This option is available with every field for the Contact data source's Text data type.

>> **In All:** This option is only available for columns with a Location data type

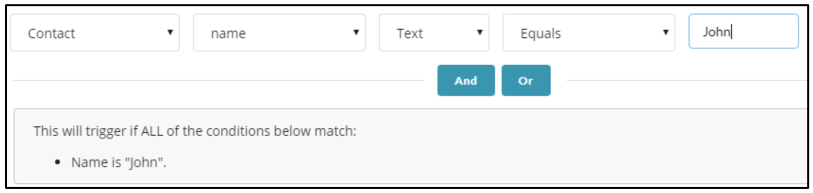
>> **In Any:** This option is only available for columns with a Location data type

>> **Not in All:** This option is only available for columns with a Location data type

>> **In None:** This option is only available for columns with a Location data type

> After you have selected your means of comparison from the dropdown, a final field will appear at the far right of the sidebar. In this field, you can type in a value for the system to look for when determining which path the contact should take in the campaign. Type in your desired value in this text field, select a date from the dropdown calendar for any date data types, or select one or more map regions for any location data types.

[**Note:** For the Interactions data source's Account Manager field, this last field will include a dropdown menu where you can choose from a list of names associated with the account or choose the No Account Manager option. The account manager is the SimplyCast user who has been designated as responsible for reaching out to and managing any requests from this contact.]



> For example, the image above depicts a decision wherein the contact will continue down this particular journey only if their name is John.

To create this decision condition:

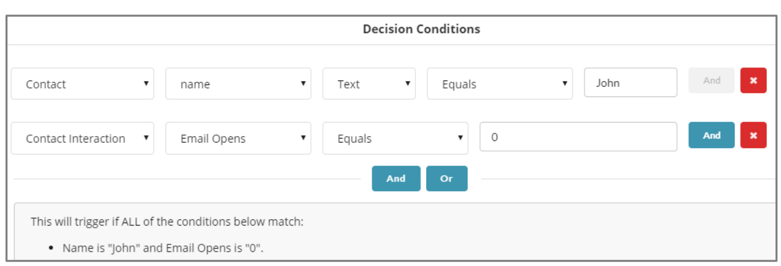
>> Select "Contact" as your data source.
>> Select "Name" as your CRM field.
>> Select "Text" as your data type.
>> Select "Equals" as your means of comparison.
>> Enter "John" into the Value field.
>> Your decision should look like this: *Contact* > *Text* > *Name* > *Equals* > *John*

> You can also create additional conditions for this decision by using the And and Or buttons located to the right of the first decision condition. Clicking the And or Or buttons will add a field set underneath the original decision.

> Choosing "And" will cause the decision process to look at both of these conditions and only send the contact down this particular path in the campaign if they meet the parameters of both field sets. For example, say that in addition to their name being John, in order for a contact to be sent down this path, they must also have not opened any previous emails.

To demonstrate this example:

>> Select the "And" button to the right of the first condition to create a new field set below the first decision condition.

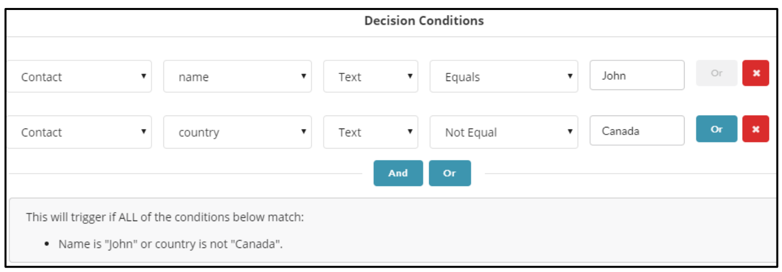


- >> Select "Contact Interaction Data" as your data source.
- >> Choose "Email Opens" as your information field.
- >> Select "Equals" as your means of comparison.
- >> Type "0" into the Value field.
- >> Your decision should now look like this: *Contact* > *Text* > *Name* > *Equals* > *John* **AND** *Contact Interaction Data* > *Email Opens* > *Equals* > *0*

- > On the other hand, choosing "Or" will cause the decision process to look at the multiple conditions and if at least one of them applies to the contact, they will be sent down this particular path in the campaign. For example, starting with the first decision example where only contacts whose names are John will be sent down this path, we can add an alternate condition where contacts whose names aren't necessarily John can be sent down this path as long as they reside outside of Canada.

To demonstrate this example:

- >> Select the "Or" button to the right of the first condition to create a new field set below the first decision condition.



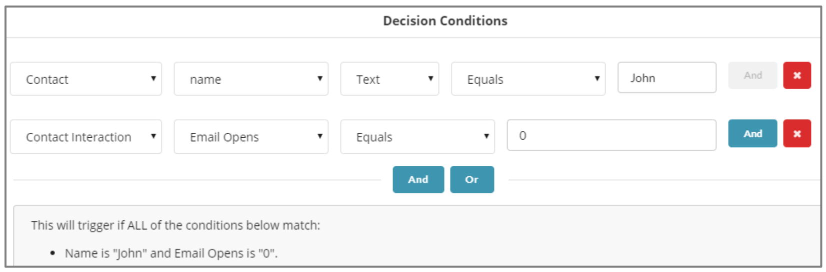
- >> Select "Contact" as your data source.
- >> Select "Country" for the CRM field.
- >> Choose "Text" as your data type.
- >> Select "Not Equal" as the means of comparison.
- >> Type "Canada" into the Value field.
- >> Now, the new filter will look like this: *Contact* > *Text* > *Name* > *Equals* > *John* **OR** *Contact* > *Text* > *Country* > *Not Equal* > *Canada*

- > Create as many conditions for the decision filter as you like by continuing to click the "And" or "Or" buttons, depending on your first selection.

[**Note:** Once you have selected either "And" or "Or" when creating a new decision condition, if you want to add additional conditions, you will only have that option available. For example, if you have a condition such as "this" AND "that," you will not be able to add an "Or" option to the condition. To add an "Or" decision condition in this case, you will need to create a separate decision group. See below for more.]

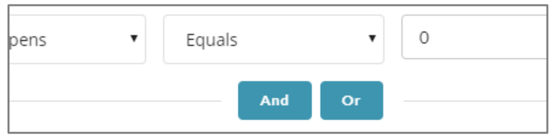
> You can also create different decision groups within the same Decision element by clicking the "And" or "Or" buttons below the first decision group. Whereas decision conditions are directly affected by each other on an individual level (for example: "this" AND/OR "that" AND/OR "that") decision groups are affected by other decision groups as a whole and not the specific conditions within them. You can have a decision group that has a "this" OR "that" OR "that" condition, and another decision group that must also apply – [AND] "this" OR "that" OR "that." This means you can have a decision set up wherein the contact matches the conditions set in one decision group and/or the conditions set in any additional groups. This allows you to create very complex decision conditions.

> For example, say we continue with the first "and" decision set we created, where in order for a contact to progress down a certain path, their name has to be John and they must not have opened any past emails. However, we also want the contact to progress down the path regardless of whether their name is John and they haven't opened any emails — if their contact score is greater than or equal to 50. Since we cannot add this "or" condition into the initial decision group, we must create a new one.



To demonstrate this example from the beginning:

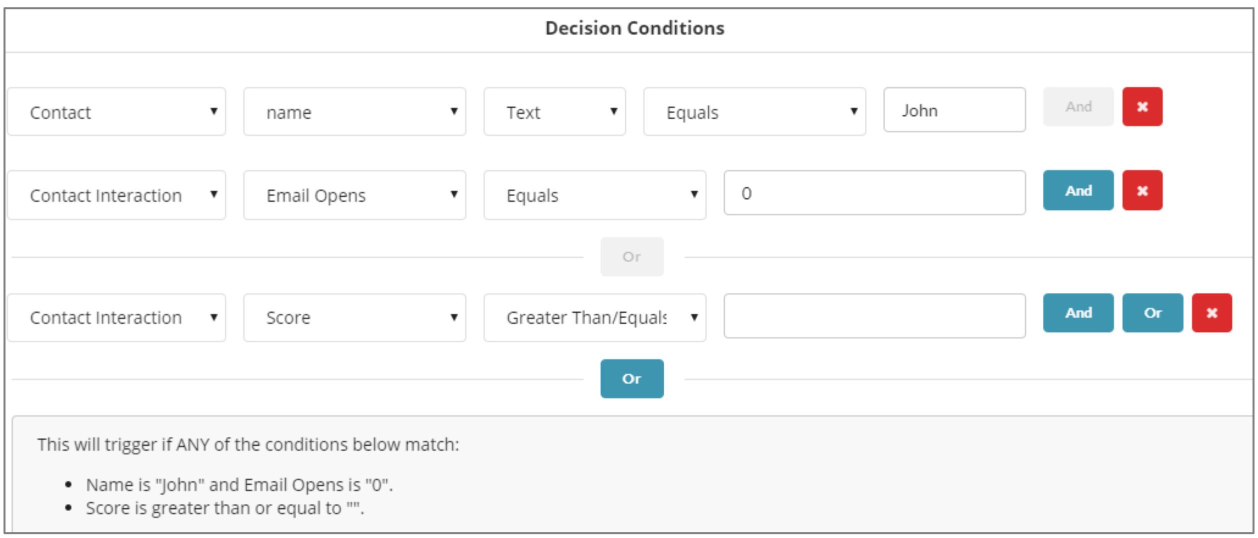
>> Select "Contact" as your data source.
>> Select "Name" as your CRM field.
>> Select "Text" as your data type.
>> Select "Equals" as your means of comparison.
>> Enter "John" into the Value field.
>> Your decision should look like this: *Contact* > *Text* > *Name* > *Equals* > *John*
>> Select the "And" button to the right of the first condition to create a new field set below the first decision condition.
>> Select "Contact Interaction Data" as your data source.
>> Choose "Email Opens" as your information field.
>> Select "Equals" as your means of comparison.
>> Type "0" into the Value field.
>> Your decision should now look like this: *Contact* > *Text* > *Name* > *Equals* > *John* **AND** *Contact Interaction Data* > *Email Opens* > *Equals* > *0*



>> Next, click the blue “Or” button **below** these conditions sets to add a new decision group below the first.

[**Note:** There should be a gray divider line with a grayed-out “Or” icon between the two decision groups to indicate the separation between the groups.]

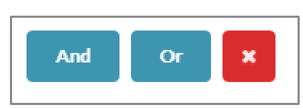
>> In this new decision group, select “Contact Interaction Data” as the data type.
>> Select “Score” as the information field.
>> Select “Greater Than/Equals” as the means of comparison.
>> Enter “50” into the Value field.
>> Now the decision should look like this: (*Contact* > *Text* > *Name* > *Equals* > *John* AND *Contact Interaction Data* > *Email Opens* > *Equals* > *0)* **OR** (*Contact Interaction Data* > *Score* > *Greater Than/Equal* > *50)*



> Create as many decision groups as you’d like by continuing to click the “And” or “Or” buttons below the last group, depending on your first selection.

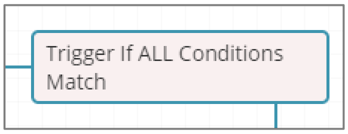
[**Note:** Once you have selected either “And” or “Or” when creating a new decision group, if you want to add additional groups, you will only have that option available. For example, if you have two groups such as (this AND that) OR (that), you will not be able to add an “And” group to the decision.]

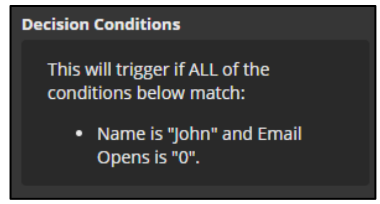
> Delete a decision condition in the sidebar by clicking the red X button located on the right side of the sidebar across from the decision condition you wish to delete.



> Once you've finished configuring the decision, click the blue Confirm button at the bottom left of the Decision Settings sidebar. Or, click Cancel to close the sidebar without configuring the decision.

> Once you have configured a decision, the textbox on the connection between the two elements will now read "Trigger if ALL Conditions Match" or "Trigger if ANY Conditions Match," and the Decision Conditions field in the Connection Settings section will describe the decision conditions required to trigger the connection.





[**Note:** Repeat these steps for any other connections between the Decision element and any other element in the campaign as required.]

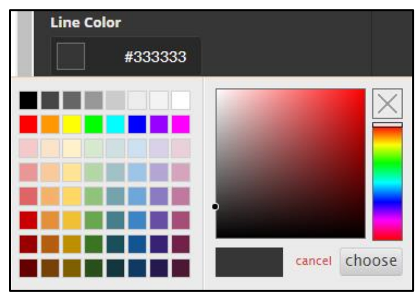
- The fourth field in the Settings Panel is the Line Color field where you can choose the color for that connection's line.

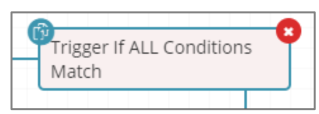
  To choose a color:

  > 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.

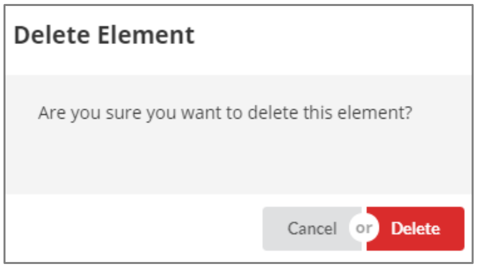
  > Choose your desired color from the pre-set swatches on the left side of the selector dropdown or use the right side to manually choose a color.

  > 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.





- To copy a connection, hover your mouse over the textbox appearing on the connection to show a blue button at the top left of the textbox. Copying a connection saves you from having to re-configure the settings for any additional connections requiring the same conditions, saving time. Click and drag this button to create a new connection that can be attached to a new element. All connection settings configured in the initial connection will be copied over to the new connection.

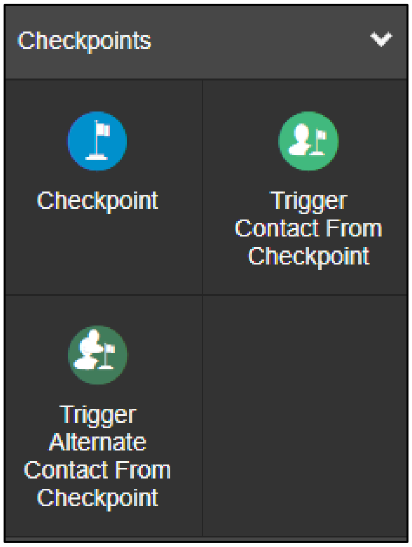


- Delete a connection by hovering over the connection's textbox and clicking the red "X" button.
- To delete the element from the campaign, hover your mouse over the element and click the red "X" button

in the top right corner that appears. A pop-up window will appear asking you to confirm the deletion. Click the red Delete button to complete the deletion or Cancel to close the window without deleting the element.

[**Note:** You will only receive the confirmation pop-up if the element has been activated or if the campaign has been saved.]

Checkpoints

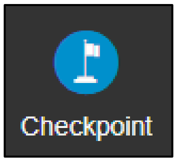


The next tab in the Creation Panel on the left side of the screen is the Checkpoints tab. The elements appearing in this tab allow you to create and trigger checkpoints at specific points in the campaign where contacts can return if specific actions are taken/not taken.

These elements are:

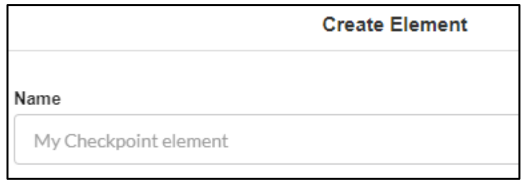
- **Checkpoint:** This element is a target element that allows you to create a fixed point in a campaign where contacts can jump back to.
- **Trigger Contact From Checkpoint:** This element triggers the associated Checkpoint element for a contact, allowing them to return to the specified point in the campaign up to a configurable maximum of times per root journey.
- **Trigger Alternate Contact From Checkpoint:** This element triggers the associated Checkpoint element for a contact's alternate contact, up to a configurable maximum number of contacts per root journey.

Checkpoint



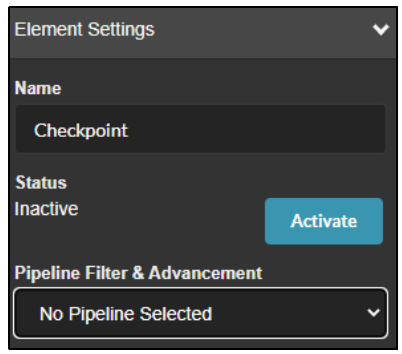
The first drag-and-drop element in the Checkpoints tab is the Checkpoint element. This element is the target element that allows you to create a fixed point in a campaign where contacts can jump back to.

To begin setting up this element:



- Click and drag the Checkpoint element or double click it to add it to the canvas.
- When you place the element, a sidebar will appear asking you to name the new Checkpoint element. Enter a name in the field provided.
- Click the green Create button at the bottom of the sidebar to create the new element or click the gray Close button to close the sidebar without creating the new element.

- Once you have placed the element onto the canvas and have it selected with your mouse, three additional fields will appear in the Element Settings section on the right-hand side of your screen:

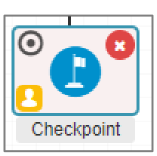


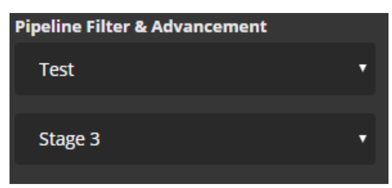
> **Name:** This field contains the name of the checkpoint you created, that you can modify if desired by typing a new name into the field.

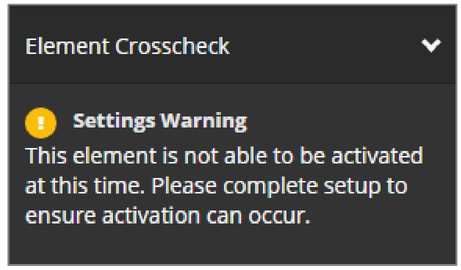
> **Status:** This field is where you can activate or deactivate the element by clicking the blue or red button respectively. Activating an element means that the element will be able to be used as part of the campaign and should perform as expected.

[**Note:** Keep in mind the element will not become active until you save the campaign.]

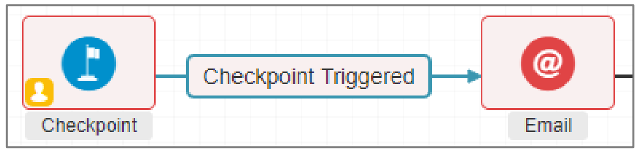
> **Pipeline Filter & Advancement:** Choose whether you would like contacts to progress through any pipelines you may have. In the dropdown menu in this field, choose the pipeline you would like contacts to be added to. A second dropdown will appear to choose the stage of that pipeline contacts will be added to at this point of the campaign. If you choose to set a pipeline stage to this element, an icon will appear on the bottom left corner of the element in your campaign to indicate that contacts will move through a pipeline stage at this point in your campaign.





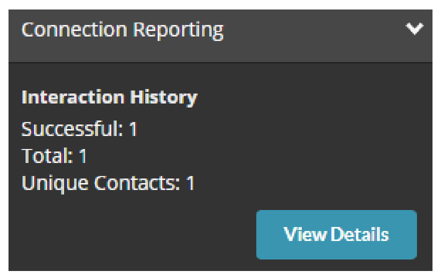


- If there is an issue with the element that needs to be resolved before the element can be activated, there will be a yellow or red exclamation point symbol in the top right corner of the element to signify this. If this is the case, when you select the element with your mouse, an additional section called Element Crosscheck will appear in the Settings Panel. The Element Crosscheck section will describe the issue with the element and provide instructions on how to resolve it.
- To connect your Checkpoint element to another element in your campaign, click the black target icon located on the top corner of your element and drag it over to the element you wish to connect it to.

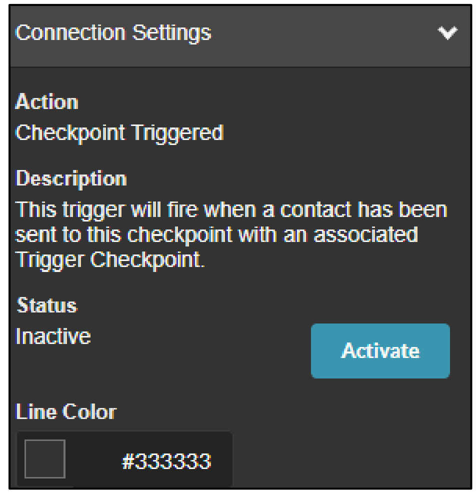


[**Note:** Some elements are not able to be connected to each other. For example, you cannot connect two Starting Point elements to each other, and you cannot connect a Starting Point element to the Contact Changed, Start from CRM, or Inbound API elements.]

- Once a connection has been established between the Checkpoint element and at least one other element, a textbox with the connection type will appear on the line. Click on this textbox to open two new sections in the Settings Panel, Connection Reporting and Connection Settings.
- The Connection Reporting section contains the Interaction History. When you first create the connection, it will only show that there have been no interactions. Once the connection has triggered at least once, you will see more information. Interaction History will then show the number of Successful (and Unsuccessful, if any) triggers, the Total number of triggers, and the number of Unique Contacts who have triggered the trigger.



- The View Details button, when selected, will open the Connection History Sidebar, allowing you to see the history of all the interactions associated with the element. See the section on Interaction History for more information.

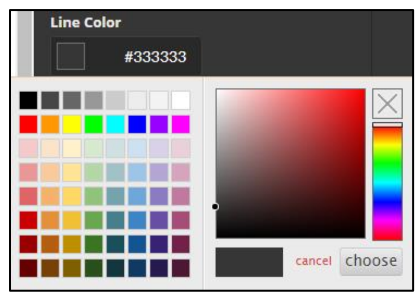


- The first Connection Settings field is the Action field, which indicates the connection type (Checkpoint Triggered).
- The second field is the Description field which will display a short description for when the connection will be triggered.
- The next field is the Status field where you can activate or deactivate the connection by clicking the blue or red button respectively. Activating a connection means that the connection will be able to be used as part of the campaign and should perform as expected.

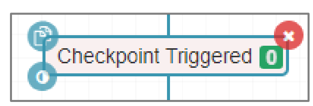
[**Note:** Keep in mind the connection will not become active until you save the campaign.]

- The last field is the Line Color field where you can choose the color for that connection's line.

To choose a color:

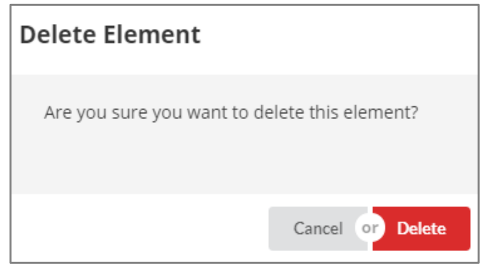


> Click on the color square in the field and a color selector will appear or enter the hex code of the color in the field next to the square.
> Choose your desired color from the pre-set swatches on the left side of the selector dropdown or use the right side to manually choose a color.
> Click the Choose 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.

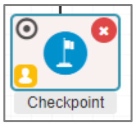


- To copy a connection, hover your mouse over the textbox appearing on the connection to show a blue button at the top left of the textbox. Copying a connection saves you from having to re-configure the settings for any additional connections requiring the same conditions, saving time. Click and drag this button to create a new connection that can be attached to a new element. All connection settings configured in the initial connection will be copied over to the new connection.

- Delete a connection by hovering over the connection's textbox and clicking the red "X" button.



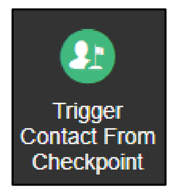
- To delete the element from the campaign, hover your mouse over the element and click the red "X" button in the top right corner that appears. A pop-up window will appear asking you to confirm the deletion. Click the red Delete button to complete the deletion or Cancel to close the window without deleting the element.



[**Note:** You will only receive the confirmation pop-up if the element has been activated or if the campaign has been saved.]

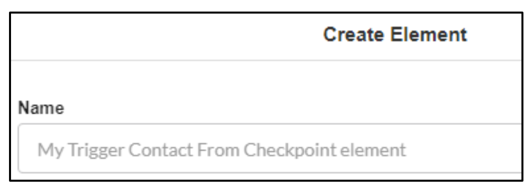
[**Note:** This element will only work if there is an associated Trigger Contact From Checkpoint or Trigger Alternate Contact From Checkpoint element in the campaign. Refer to the corresponding sections below for more information.]

Trigger Contact From Checkpoint



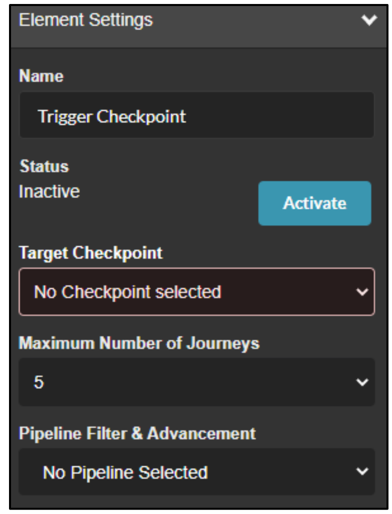
The next drag-and-drop element in the Checkpoints tab is the Trigger Contact From Checkpoint element. This element triggers the associated Checkpoint element for a contact, allowing them to return to the specified point in the campaign up to a configurable maximum of times per root journey.

To begin setting up this element:



- Click and drag the Trigger Contact From Checkpoint element or double click it to add it to the canvas.
- When you place the element, a sidebar will appear asking you to name the new Trigger Contact From Checkpoint element. Enter a name in the field provided.

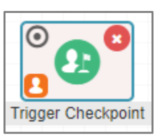
- Click the green Create button at the bottom of the sidebar to create the new element or click the gray Close button to close the sidebar without creating the new element.
- Once you have placed the element onto the canvas and have it selected with your mouse, five additional fields will appear in the Element Settings section on the right-hand side of your screen:

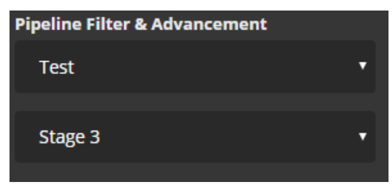


> **Name:** This field contains the name of the element you created, that you can modify if desired by typing a new name into the field.
> **Status:** This field is where you can activate or deactivate the element by clicking the blue or red button respectively. Activating an element means that the element will be able to be used as part of the campaign and should perform as expected.

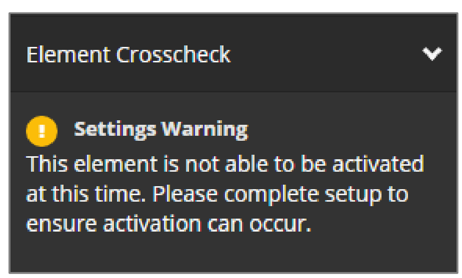
[**Note:** Keep in mind the element will not become active until you save the campaign.]

> **Target Checkpoint:** This field contains a dropdown menu where you must select a Checkpoint element to associate with this trigger. Click the dropdown and choose the appropriate Checkpoint element.
> **Maximum Number of Journeys:** This field contains a dropdown menu where you must select the maximum number of times a contact can be triggered to return to the associated Checkpoint element. Choose from the dropdown from up to a maximum of 10 triggers.
> **Pipeline Filter & Advancement:** Choose whether you would like contacts to progress through any pipelines you may have. In the dropdown menu in this field, choose the pipeline you would like contacts to be added to. A second dropdown will appear to choose the stage of that pipeline contacts will be added to at this point of the campaign. If you choose to set a pipeline stage to this element, an icon will appear on the bottom left corner of the element in your campaign to indicate that contacts will move through a pipeline stage at this point in your campaign.

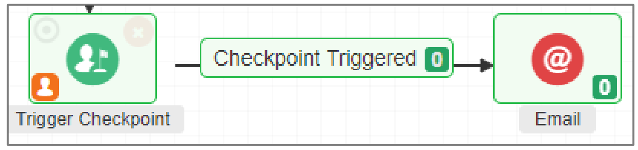




- If there is an issue with the element that needs to be resolved before the element can be activated, there will be a yellow or red exclamation point symbol in the top right corner of the element to signify this. If this is the case, when you select the element with your mouse, an additional section called Element Crosscheck will appear in the Settings Panel. The Element Crosscheck section will describe the issue with the element and provide instructions on how to resolve it.



- To connect your Trigger Contact from Checkpoint element to another element in your campaign, click the black target icon located on the top corner of your element and drag it over to the element you wish to connect it to.



[**Note:** Some elements are not able to be connected to each other. For example, you cannot connect two Starting Point elements to each other, and you cannot connect a Starting Point element to the Contact Changed, Start from CRM, or Inbound API elements.]

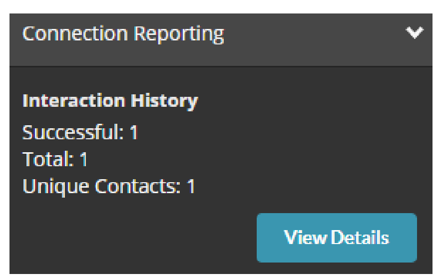
- A sidebar will appear where you can choose between two connection types:

  > **Checkpoint Triggered:** This means the campaign will continue through the connection when a contact has been sent to the corresponding Checkpoint element.

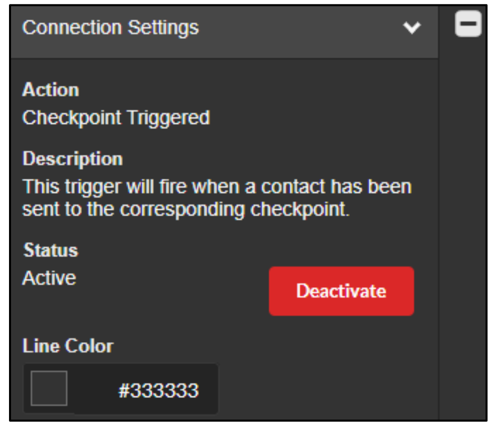
  > **Maximum Journeys Reached:** This means the contact will continue through the connection if they have reached the maximum number of journeys back to the corresponding Checkpoint element.

- Click the green Create button to connect the two elements or the gray Close button to close the sidebar without connecting the two elements

- Once a connection has been established between the Trigger Contact From Checkpoint element and at least one other element, a textbox with the connection type will appear on the line. Click on this textbox to open two new sections in the Settings Panel, Connection Reporting and Connection Settings.
- The Connection Reporting section contains the Interaction History. When you first create the connection, it will only show that there have been no interactions. Once the connection has triggered at least once, you will see more information. Interaction History will then show the number of Successful (and Unsuccessful, if any) triggers, the Total number of triggers, and the number of Unique Contacts who have triggered the trigger.



- The View Details button, when selected, will open the Connection History Sidebar, allowing you to see the history of all the interactions associated with the element. See the section on Interaction History for more information.
-

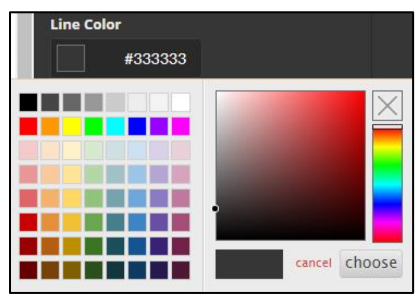


- The first Connection Settings field is the Action field, which indicates the connection type, either Checkpoint Triggered or Maximum Journeys Reached.
- The second field is the Description field which will display a short description for when the connection will be triggered.
- The next field is the Status field where you can activate or deactivate the connection by clicking the blue or red button respectively. Activating a connection means that the connection will be able to be used as part of the campaign and should perform as expected.

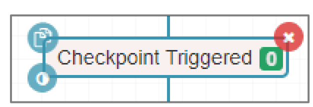
[**Note:** Keep in mind the connection will not become active until you save the campaign.]

- The last field is the Line Color field where you can choose the color for that connection's line.

  To choose a color:

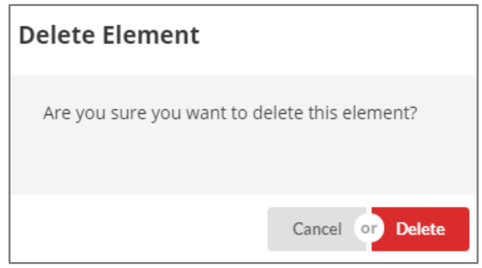


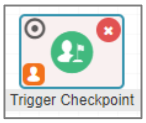
  > Click on the color square in the field and a color selector will appear or enter the hex code of the color in the field next to the square.
  > Choose your desired color from the pre-set swatches on the left side of the selector dropdown or use the right side to manually choose a color.
  > Click the 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.



- To copy a connection, hover your mouse over the textbox appearing on the connection to show a blue button at the top left of the textbox. Copying a connection saves you from having to re-configure the settings for any additional connections requiring the same conditions, saving time. Click and drag this button to create a new connection that can be attached to a new element. All connection settings configured in the initial connection will be copied over to the new connection.

- Delete a connection by hovering over the connection's textbox and clicking the red "X" button.
- To delete the element from the campaign, hover your mouse over the element and click the red "X" button in the top right corner that appears. A pop-up window will appear asking you to confirm the deletion. Click the red Delete button to complete the deletion or Cancel to close the window without deleting the element.

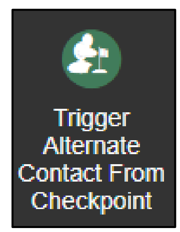




[**Note:** You will only receive the confirmation pop-up if the element has been activated or if the campaign has been saved.]

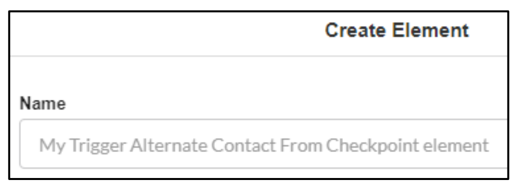
[**Note:** This element will only work if there is an associated Checkpoint element in the campaign. Refer to the *Checkpoint* section for more information.]

Trigger Alternate Contact From Checkpoint

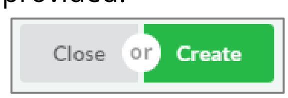


The next drag-and-drop element in the Checkpoints tab is the Trigger Alternate Contact From Checkpoint element. This element triggers the associated Checkpoint element for a contact's alternate contact, up to a configurable maximum number of contacts per root journey.

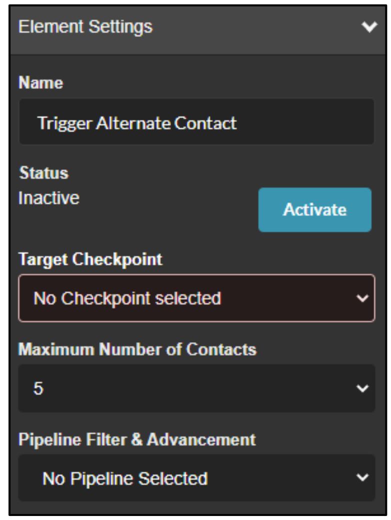
To begin setting up this element:



- Click and drag the Trigger Contact From Checkpoint element or double click it to add it to the canvas.
- When you place the element, a sidebar will appear asking you to name the new Trigger Alternate Contact From Checkpoint element. Enter a name in the field provided.
- Click the green Create button at the bottom of the sidebar to create the new element or click the gray Close button to close the sidebar without creating the new element.



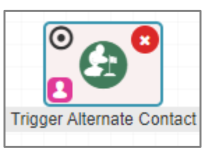
- Once you have placed the element onto the canvas and have it selected with your mouse, five additional fields will appear in the Element Settings section on the right-hand side of your screen:



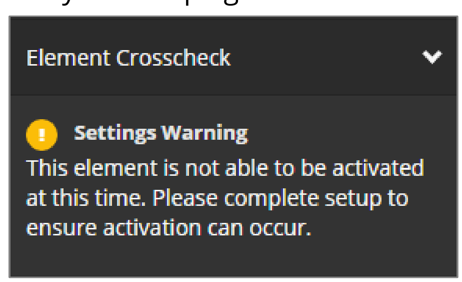
  > **Name:** This field contains the name of the element you created, that you can modify if desired by typing a new name into the field.
  > **Status:** This field is where you can activate or deactivate the element by clicking the blue or red button respectively. Activating an element means that the element will be able to be used as part of the campaign and should perform as expected.

[**Note:** Keep in mind the element will not become active until you save the campaign.]

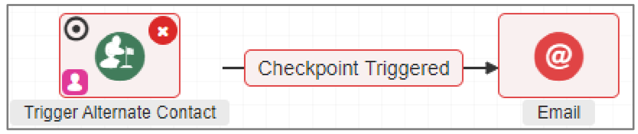
  > **Target Checkpoint:** This field contains a dropdown menu where you must select a Checkpoint element to associate with this trigger. Click the dropdown and choose the appropriate Checkpoint element.
  > **Maximum Number of Contacts:** This field contains a dropdown menu where you must select the maximum number of alternate contacts that can be triggered at the associated Checkpoint element. Choose from the dropdown from up to a maximum of 10 contacts.
  > **Pipeline Filter & Advancement:** Choose whether you would like contacts to progress through any pipelines you may have. In the dropdown menu in this field, choose the pipeline you would like contacts to be added to. A second dropdown will appear to choose the stage of that pipeline contacts will be added to at this point of the campaign. If you choose to set a pipeline stage to this element, an icon will appear on the bottom left corner of the element in your campaign to indicate that contacts will move through a pipeline stage at this point in your campaign.



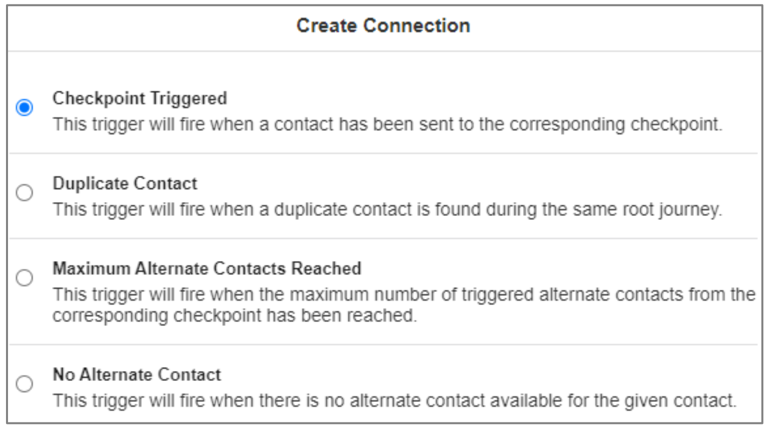
- If there is an issue with the element that needs to be resolved before the element can be activated, there will be a yellow or red exclamation point symbol in the top right corner of the element to signify this. If this is the case, when you select the element with your mouse, an additional section called Element Crosscheck will appear in the Settings Panel. The Element Crosscheck section will describe the issue with the element and provide instructions on how to resolve it.



- To connect your Trigger Contact from Checkpoint element to another element in your campaign, click the black target icon located on the top corner of your element and drag it over to the element you wish to connect it to.



[**Note:** Some elements are not able to be connected to each other. For example, you cannot connect two Starting Point elements to each other, and you cannot connect a Starting Point element to the Contact Changed, Start from CRM, or Inbound API elements.]



- A sidebar will appear where you can choose between four connection types:

  > **Checkpoint Triggered:** This means the campaign will continue through the connection when a contact has been sent to the corresponding Checkpoint element.

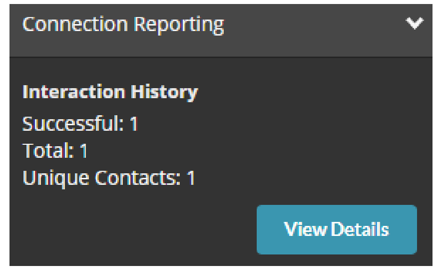
  > **Duplicate Contact:** This means the contact will pass through the connection if a duplicate contact is found in the same root journey (e.g., the alternate contact of an alternate contact is the same contact as the original contact progressing through the flow).

  > **Maximum Alternate Contacts Reached:** This means the contact will continue through the connection if the maximum number of alternate contacts have been triggered from the corresponding Checkpoint element.

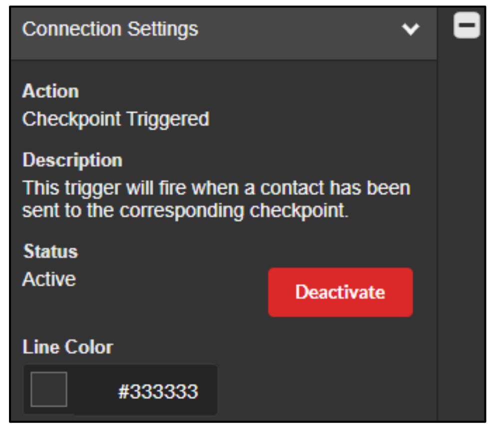
  > **No Alternate Contact:** This means the contact will continue through the connection if there are no associated alternate contacts to trigger from the corresponding Checkpoint element.

- Click the green Create button to connect the two elements or the gray Close button to close the sidebar without connecting the two elements

- Once a connection has been established between the Trigger Alternate Contact From Checkpoint element and at least one other element, a textbox with the connection type will appear on the line. Click on this textbox to open two new sections in the Settings Panel, Connection Reporting and Connection Settings.



- The Connection Reporting section contains the Interaction History. When you first create the connection, it will only show that there have been no interactions. Once the connection has triggered at least once, you will see more information. Interaction History will then show the number of Successful (and Unsuccessful, if any) triggers, the Total number of triggers, and the number of Unique Contacts who have triggered the trigger.
- The View Details button, when selected, will open the Connection History Sidebar, allowing you to see the history of all the interactions associated with the element. See the section on Interaction History for more information.

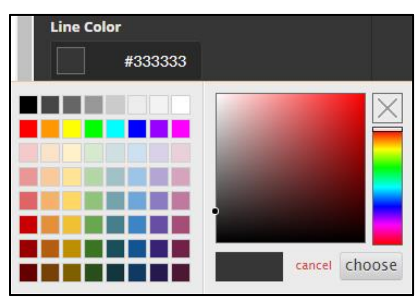


- The first Connection Settings field is the Action field, which indicates the connection type: Checkpoint Triggered, Duplicate Contact, Maximum Alternate Contacts Reached, or No Alternate Contact.
- The second field is the Description field which will display a short description for when the connection will be triggered.
- The next field is the Status field where you can activate or deactivate the connection by clicking the blue or red button respectively. Activating a connection means that the connection will be able to be used as part of the campaign and should perform as expected.

[**Note:** Keep in mind the connection will not become active until you save the campaign.]

- The last field is the Line Color field where you can choose the color for that connection's line.

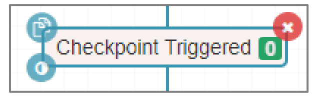
To choose a color:



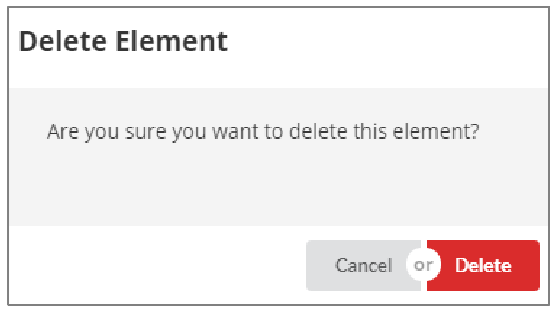
> Click on the color square in the field and a color selector will appear or enter the hex code of the color in the field next to the square.

> Choose your desired color from the pre-set swatches on the left side of the selector dropdown or use the right side to manually choose a color.

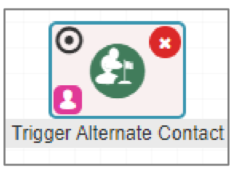
> Click the Choose button at the bottom right side of the color selector to lock in your color or click Cancel to close the selector dropdown without picking a color.



- To copy a connection, hover your mouse over the textbox appearing on the connection to show a blue button at the top left of the textbox. Copying a connection saves you from having to re-configure the settings for any additional connections requiring the same conditions, saving time. Click and drag this button to create a new connection that can be attached to a new element. All connection settings configured in the initial connection will be copied over to the new connection.
- Delete a connection by hovering over the connection's textbox and clicking the red "X" button.



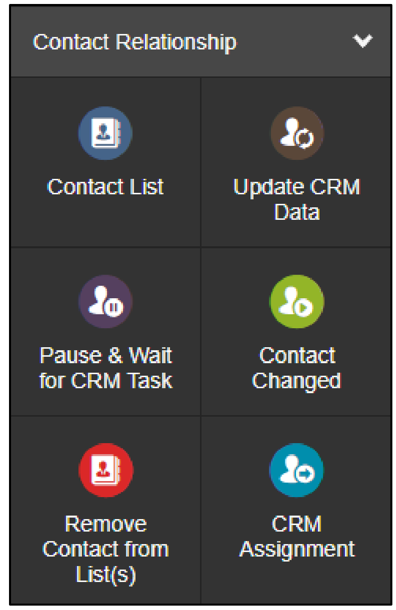
- To delete the element from the campaign, hover your mouse over the element and click the red "X" button in the top right corner that appears. A pop-up window will appear asking you to confirm the deletion. Click the red Delete button to complete the deletion or Cancel to close the window without deleting the element.



[**Note:** You will only receive the confirmation pop-up if the element has been activated or if the campaign has been saved.]

[**Note:** This element will only work if there is an associated Checkpoint element in the campaign. Refer to the *Checkpoint* section for more information.]

Contact Relationship

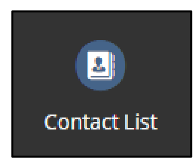


The next tab in the Creation Panel on the left side of the screen is the Contact Relationship tab. The elements appearing in this tab allow you to manage and complete tasks using the CRM.

These elements are:

- **Contact List:** This element allows you to place contacts into lists based on actions they have performed, input they submitted earlier in the campaign, or by simply reaching a point in the campaign.
- **Update CRM Data:** This element allows you to update CRM profile data when contacts reach this point in the campaign.
- **Pause & Wait for CRM Task:** This element allows you to pause your SimplyCast 360 campaign for administrative intervention.
- **Contact Changed:** This element allows you to trigger contacts to be sent through a campaign whenever a contact's metadata, CRM data, or the lists they're on are modified.
- **Remove Contact from List(s):** This element allows you to remove contacts from one or more CRM lists based on actions they have performed or input they submitted earlier in the campaign.
- **CRM Assignment:** This element allows you to assign incoming contacts to a CRM list or account manager according to a configured ruleset.

Contact List

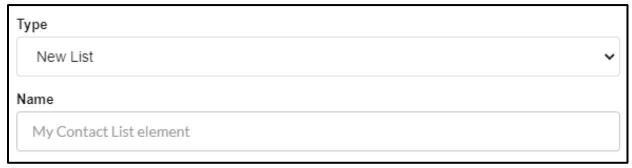


The first drag-and-drop element in the Contact Relationship tab is the Contact List element. This element allows you to place contacts into lists based on actions they have performed or input they submitted earlier in the campaign.

To begin setting up this element:

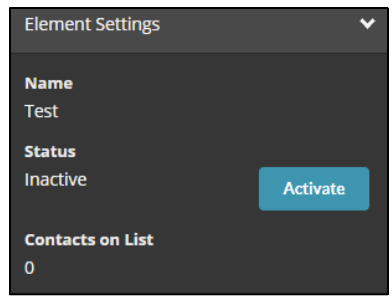
- Click and drag the Contact List element or double click it to add it to the canvas.
- When you place the element, a sidebar will appear with two fields. The first field will ask you to choose a list type from the dropdown menu in the Type field: either a new contact list or an existing list.

> If you choose to use an existing contact list, a new field will appear to choose an existing list to add contacts to. Begin typing the name of the existing list you'd like to use, and the dropdown list will automatically filter. Once you see the list you would like to use, click the name of the list to select it.



> If you choose to create a new list, the second field will ask you to enter a name for the new Contact List element. Type the name into the textbox provided.

- Click the green Create button at the bottom of the sidebar to create the new element or click the gray Close button to close the sidebar without creating the new element.



- Once you have placed the element onto the canvas and have it selected with your mouse, four additional fields will appear in the Element Settings section on the right-hand side of your screen:

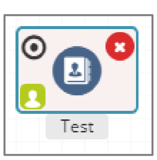
> **Name:** This field contains the name of the contact list you added, which cannot be changed from here.

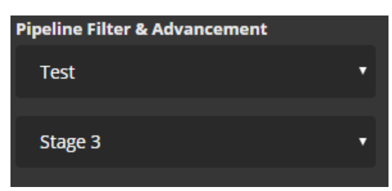
> **Status:** This field is where you can activate or deactivate the element by clicking the blue or red button respectively. Activating an element means that the element will be able to be used as part of the campaign and should perform as expected.

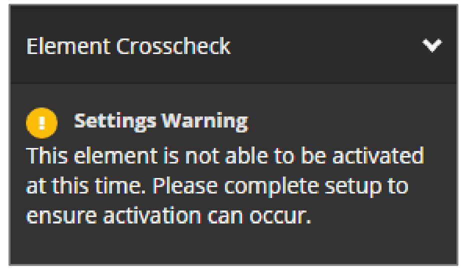
[**Note:** Keep in mind the element will not become active until you save the campaign.]

> **Contacts on List:** This field will show the number of contacts on the list associated with this element.

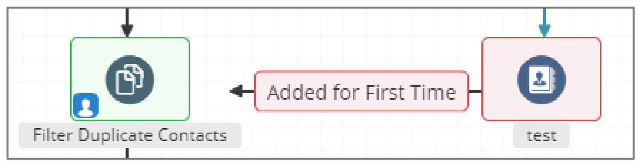
> **Pipeline Filter & Advancement:** Choose whether you would like contacts to progress through any pipelines you may have. In the dropdown menu in this field, choose the pipeline you would like contacts to be added to. A second dropdown will appear to choose the stage of that pipeline contacts will be added to at this point of the campaign. If you choose to set a pipeline stage to this element, an icon will appear on the bottom left corner of the element in your campaign to indicate that contacts will move through a pipeline stage at this point in your campaign.





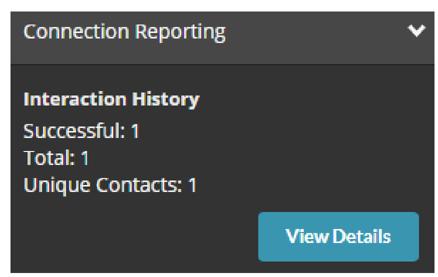


- If there is an issue with the element that needs to be resolved before the element can be activated, there will be a yellow or red exclamation point symbol in the top right corner of the element to signify this. If this is the case, when you select the element with your mouse, an additional section called Element Crosscheck will appear in the Settings Panel. The Element Crosscheck section will describe the issue with the element and provide instructions on how to resolve it.
- To connect your Contact List element to another element in your campaign, click the black target icon located on the top corner of your element and drag it over to the element you wish to connect it to.

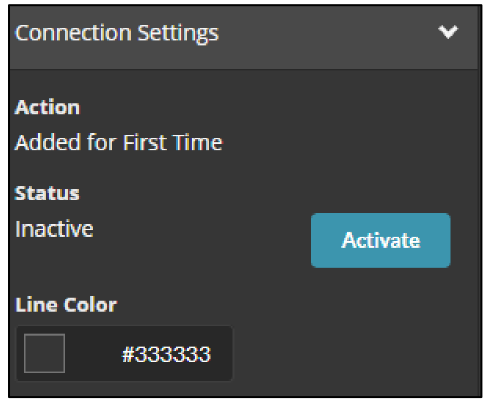


[**Note:** Some elements are not able to be connected to each other. For example, you cannot connect two Starting Point elements to each other, and you cannot connect a Starting Point element to the Contact Changed, Start from CRM, or Inbound API elements.]

- Once a connection has been established between the Contact List element and at least one other element, a textbox with the connection type will appear on the line.
- Click on this textbox to open two new sections in the Settings Panel, Connection Reporting and Connection Settings.
- The Connection Reporting section contains the Interaction History. When you first create the connection, it will only show that there have been no interactions. Once the connection has triggered at least once, you will see more information. Interaction History will then show the number of Successful (and Unsuccessful, if any) triggers, the Total number of triggers, and the number of Unique Contacts who have triggered the trigger.



- The View Details button, when selected, will open the Connection History Sidebar, allowing you to see the history of all the interactions associated with the element. See the section on Interaction History for more information.

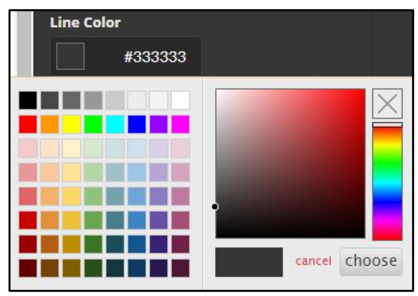


- The first Connection Settings field is the Action field, which indicates the connection type (Added for First Time).
- The second field is the Description field which will display a short description for when the connection will be triggered.
- The next field is the Status field where you can activate or deactivate the connection by clicking the blue or red button respectively. Activating a connection means that the connection will be able to be used as part of the campaign and should perform as expected.

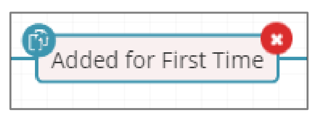
[**Note:** Keep in mind the connection will not become active until you save the campaign.]

- The last field is the Line Color field where you can choose the color for that connection's line.

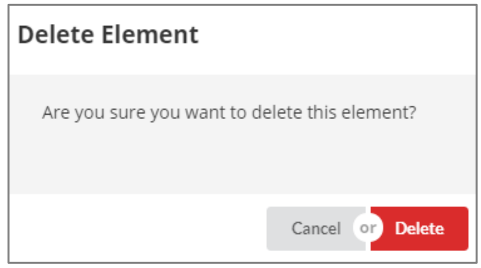
  To choose a color:



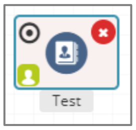
  > Click on the color square in the field and a color selector will appear or enter the hex code of the color in the field next to the square.
  > Choose your desired color from the pre-set swatches on the left side of the selector dropdown or use the right side to manually choose a color.
  > Click the 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.



- To copy a connection, hover your mouse over the textbox appearing on the connection to show a blue button at the top left of the textbox. Copying a connection saves you from having to re-configure the settings for any additional connections requiring the same conditions, saving time. Click and drag this button to create a new connection that can be attached to a new element. All connection settings configured in the initial connection will be copied over to the new connection.

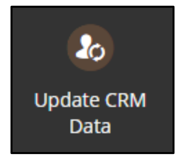


- Delete a connection by hovering over the connection's textbox and clicking the red "X" button.
- To delete the element from the campaign, hover your mouse over the element and click the red "X" button in the top right corner that appears. A pop-up window will appear asking you to confirm the deletion. Click the red Delete button to complete the deletion or Cancel to close the window without deleting the element.



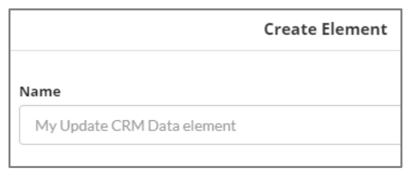
[**Note:** You will only receive the confirmation pop-up if the element has been activated or if the campaign has been saved.]

Update CRM Data



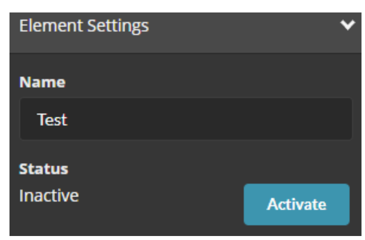
The second drag-and-drop element in the Contact Relationship tab is the Update CRM Data element. This element allows you to update CRM profile data when contacts reach this point in the campaign.

To begin setting up this element:



- Click and drag the Update CRM Data element or double click to add it to the canvas.
- When you place the element, a sidebar will appear where you will be asked to enter a name for the new element. Type the name into the textbox provided.
- Click the green Create button to create the new element or click the gray Close button to close the sidebar without creating the new element.

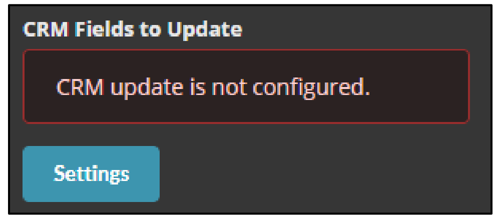
- Once you have placed the element onto the canvas and have it selected with your mouse, four additional fields will appear in the Element Settings section on the right-hand side of your screen:



  > **Name:** This field contains the name you selected when you added the element to the canvas. To change the name of your element, edit the name in the textbox provided.

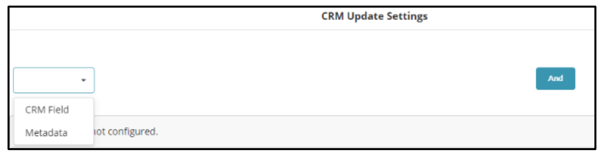
  > **Status:** This field is where you can activate or deactivate the element by clicking the blue or red button respectively. Activating an element means that the element will be able to be used as part of the campaign and should perform as expected.

[**Note:** Keep in mind the element will not become active until you save the campaign.]



> **CRM Fields to Update:** This field is where you must determine what contact information is updated whenever contacts reach the Update CRM Data element in the campaign.

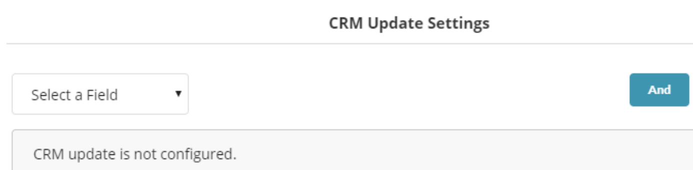
To configure these settings:



>> Click the blue Settings button to open a CRM Update Settings sidebar.

>> One field will appear in the sidebar where you are asked to choose the category of data you would like to have updated, either CRM Field or Metadata.

>> Next, you select the data type in the CRM that you would like to have updated when contacts reach this point in the campaign.

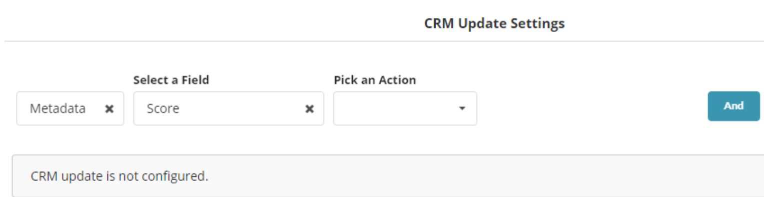


>> The CRM Field option will allow you to select any CRM column, with a couple exceptions for specific protected fields including Name, Email , Phone, Mobile, Fax, and any field with the Generated ID data type.

>> For Metadata, the default options available are:

Account Manager
Acquisition Cost
Ad Campaign
Ad Content
Ad Medium
Ad Source
Alternate Contact
Potential Value
Purchase Amount
Score
Search Term
Site Category
Tags

[**Note:** The names of any pipelines you have created will show up in this dropdown menu as well. In subsequent steps in this section, with the addition of new fields in the sidebar, options that are available with any pipeline selection are noted as being available with "Pipelines."]



>> Once a Data Type is selected from this first dropdown menu, and a Field is selected in the second dropdown menu, a third field will appear to the right of the original field. In this field, you are asked to choose an action, which indicates how the CRM field will be updated.

In total there are 11 options in the Actions field:

- **Set to:** This option is available with the pipelines, Score, Account Manager, Acquisition Cost, Potential Value, and Purchase Amount fields, and most CRM fields. It will either add a new field where you can choose a pipeline stage that contacts will be entered into when they reach this stage of the campaign, a new field will appear where you can type in the value this CRM data type will be updated to once this element is reached, or another field will appear where you can choose between setting a relative or fixed date – which in turn adds additional buttons where you can configure the fixed date or the offset relative to the trigger time.
- **Clear Stage:** This option is available with any pipeline options where you can set the field to be cleared of any pipeline stage they may be in.
- **Add to:** This option is available with the Tags, Ad Source, Ad Medium, Ad Campaign, Ad Content, Search Term, Site Category, and Alternate Contact fields. Choosing this option will cause a new field to appear in the sidebar where you can type in a value the chosen CRM data type will be updated to once the contact reaches this point in the campaign.
- **Remove from:** This option is available with the Tags, Ad Source, Ad Medium, Ad Campaign, Ad Content, Search Term, Site Category, and Alternate Contact fields. Choosing this option will cause a new field to appear in the sidebar where you can type in a value that, should it appear in the individual contact's profile, will be removed from the CRM data type.

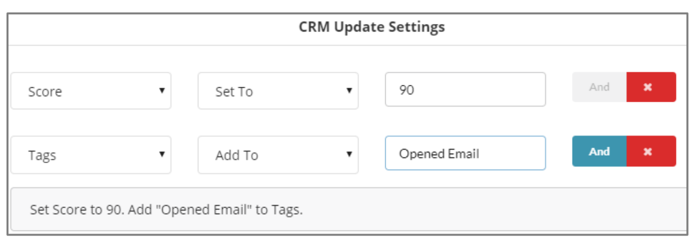
[**Note:** If the contact does not have the value inputted in the chosen CRM data type field, the system will disregard this Update CRM Data element task.]

- **Clear:** This option is available with the Tags, Ad Source, Ad Medium, Ad Campaign, Ad Content, Search Term, Site Category, and Alternate Contact fields. Choosing this option will automatically erase any data in the chosen data type field in the contact's CRM profile.

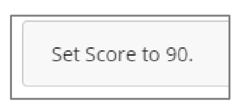
- **Add:** This option is available with the Score, Acquisition Cost, Potential Value, and Purchase Amount and all number and date fields. Choosing this option will cause a new field to appear in the sidebar where you can type in the value that will be added to the contact's CRM profile for the chosen data type. For date and time fields, these will subtract time from the value in the selected field relative to the original time.
- **Subtract:** This option is available with the Score, Acquisition Cost, Potential Value, and Purchase Amount, and all number and date fields. Choosing this option will cause a new field to appear in the sidebar where you are able to type in a value that will be subtracted from the contact's CRM profile in the chosen data type. For date and time fields, these will add time to the value in the selected field relative to the original time.
- **Clear Manager:** This option is available with the Account Manager field. Choosing this option will automatically erase any Account Manager data from the chosen data type in the contact's CRM profile.
- **Divide:** This option is available for number fields and will divide the value in the selected column by the specified value.
- **Modulo:** This option is available for number fields and will set the selected column's value to the remainder of dividing the value in the selected column by the specified value.
- **Multiply:** This option is available for number fields and will multiply the value in the selected column by the specified value.

>> Once you have chosen one of the above options, if a third Value field or pop-up appears, fill in the appropriate information as required.

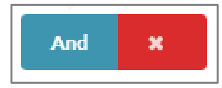
>> You can create an additional condition for updating the CRM by clicking the blue And button that appears in the sidebar underneath your primary update. Once clicked, a new field will appear below the button where you can begin creating a new update to be used along with the first. Continue to click the And button to create as many CRM updates as you want.



>> A textbox at the bottom of the sidebar will provide a written description of the CRM update(s) you have configured.

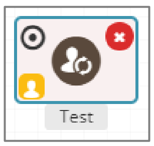


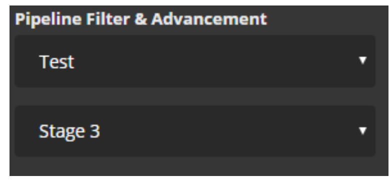
>> To delete any of the CRM updates that have been configured (if multiple have been configured), click the red "X" button located on the right-hand side of the configured update you wish to delete.



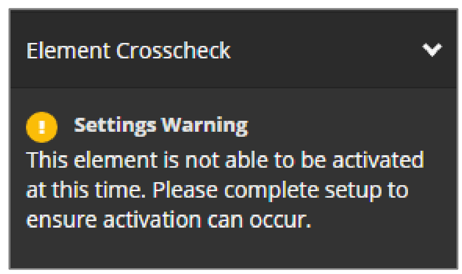
>> Click the blue Confirm button to save the changes you made to your CRM update(s) and close the sidebar. Or, click the gray Cancel button to close the window without saving your changes.

> **Pipeline Filter & Advancement:** Choose whether you would like contacts to progress through any pipelines you may have associated with the campaign. In the dropdown menu in this field, choose the pipeline you would like contacts to be added to. A second dropdown will appear to choose the stage of that pipeline contacts will be added to at this point of the campaign. If you choose to set a pipeline stage to this element, an icon will appear on the bottom left corner of the element in your campaign to indicate that contacts will move through a pipeline stage at this point in your campaign.

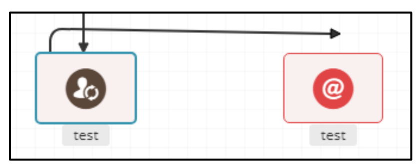




- If there is an issue with the element that needs to be resolved before the element can be activated, there will be a yellow or red exclamation point symbol in the top right corner of the element to signify this. If this is the case, when you select the element with your mouse, an additional section called Element Crosscheck will appear in the Settings Panel. The Element Crosscheck section will describe the issue with the element and provide instructions on how to resolve it.



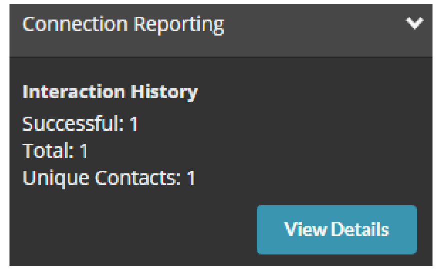
- To connect your Start from CRM element to another element in your campaign, click the black target icon located on the top corner of your element and drag it over to the element you wish to connect it to.



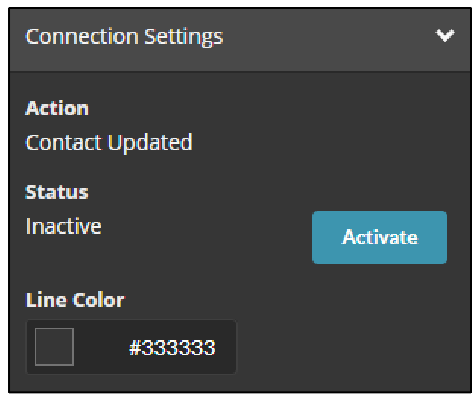
[**Note:** Some elements are not able to be connected to each other. For example, you cannot connect two Starting Point elements to each other, and you cannot connect a Starting Point element to the Contact Changed, Start from CRM, or Inbound API elements.]

- Click the green Create button to connect the two elements or the gray Close button to close the sidebar without connecting the two elements.

- Once a connection has been established between the Update CRM Data element and at least one other element, a textbox with the connection type will appear on the line. Click on this textbox to open two new sections in the Settings Panel, Connection Reporting and Connection Settings.
- The Connection Reporting section contains the Interaction History. When you first create the connection, it will only show that there have been no interactions. Once the connection has triggered at least once, you will see more information. Interaction History will then show the number of Successful (and Unsuccessful, if any) triggers, the Total number of triggers, and the number of Unique Contacts who have triggered the trigger.



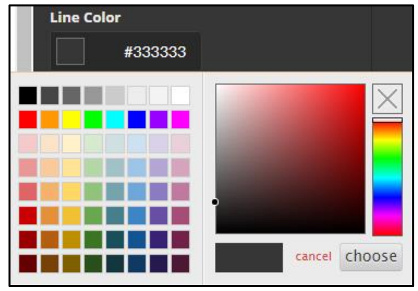
- The View Details button, when selected, will open the Connection History Sidebar, allowing you to see the history of all the interactions associated with the element. See the section on Interaction History for more information.
- The first Connection Settings field is the Action field, which indicates the connection type (Contact Updated).
- The second field is the Description field which will display a short description for when the connection will be triggered.
- The next field is the Status field where you can activate or deactivate the connection by clicking the blue or red button respectively. Activating a connection means that the connection will be able to be used as part of the campaign and should perform as expected.



[**Note:** Keep in mind the connection will not become active until you save the campaign.]

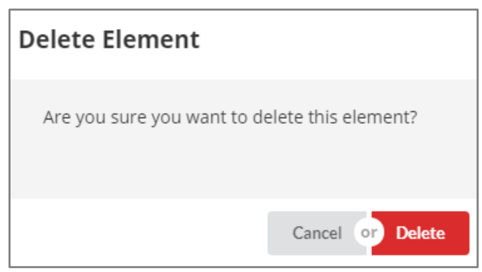
- The last field is the Line Color field where you can choose the color for that connection's line.

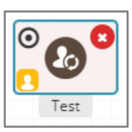
To choose a color:



> 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.
> Choose your desired color from the pre-set swatches on the left side of the selector dropdown or use the right side to manually choose a color.
> 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.

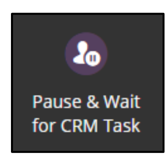
- To copy a connection, hover your mouse over the textbox appearing on the connection to show a blue button at the top left of the textbox. Copying a connection saves you from having to re-configure the settings for any additional connections requiring the same conditions, saving time. Click and drag this button to create a new connection that can be attached to a new element. All connection settings configured in the initial connection will be copied over to the new connection.
- Delete a connection by hovering over the connection's textbox and clicking the red "X" button.
- To delete the element from the campaign, hover your mouse over the element and click the red "X" button in the top right corner that appears. A pop-up window will appear asking you to confirm the deletion. Click the red Delete button to complete the deletion or Cancel to close the window without deleting the element.





[**Note:** You will only receive the confirmation pop-up if the element has been activated or if the campaign has been saved.]

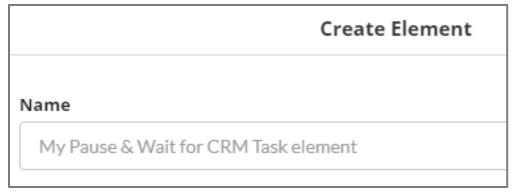
Pause & Wait for CRM Task



The next drag-and-drop element in the Contact Relationship tab is the Pause & Wait for CRM Task element. This element allows you to pause your SimplyCast 360 campaign for administrative intervention.

To begin setting up this element:

- Click and drag the Pause & Wait for CRM Task element or double click to add it to the canvas.
- When you place the element, a sidebar will appear where you will be asked to enter a name for the new element. Type the name into the textbox provided.

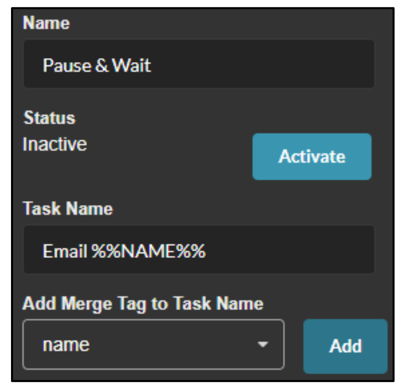


- Click the green Create button to create the new element or click the gray Close button to close the sidebar without creating the new element.

- Once you have placed the element onto the canvas and have it selected with your mouse, additional fields will appear in the Element Settings section on the right-hand side of your screen:

  > **Name:** This field contains the name you selected when you added the element to the canvas. To change the name of your element, edit the name in the textbox provided.

  > **Status:** This field is where you can activate or deactivate the element by clicking the blue or red button respectively. Activating an element means that the element will be able to be used as part of the campaign and should perform as expected.

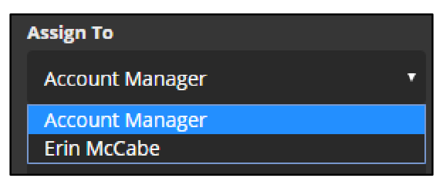


  > **Task Name:** This field allows you to add a name to the tasks generated by the system. The task name will appear as the subject of the email sent to the account manager. Enter the name into the text box provided. By default the task will be given the same name as the Pause & Wait for CRM Task element.

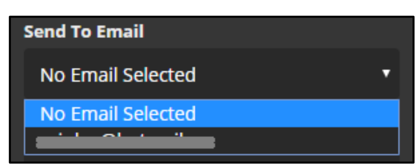
  > **Add Merge Tag to Task Name:** This field allows you to personalize the task name by adding a merge tag. Select the merge tag you would like to add from the dropdown menu available and click the blue Add button to add it to the Name field.

[**Note:** Keep in mind the element will not become active until you save the campaign.]

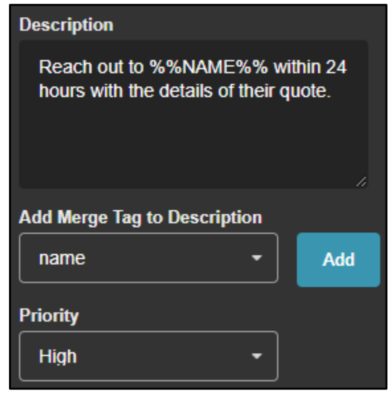
  > **Assign To:** This option contains an Account Manager dropdown menu where you can choose a user on your account to be responsible for ensuring the designated CRM task is complete and the campaign is restarted for the contact.



  > **Send to Email:** This field contains a dropdown menu with the available sender email addresses to choose from that will send an email to a designated sender



address available in the SimplyCast account to alert them of the task that requires their attention.

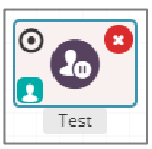


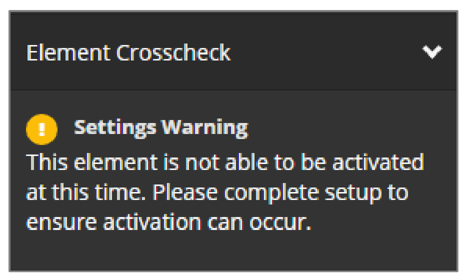
> **Description:** This field contains a textbox where you can type out a description of the task the task recipient must complete before manually restarting the campaign.

> **Add Merge Tag to Description:** This field allows you to personalize the task description by adding a merge tag. Select the merge tag you would like to add from the dropdown menu available and click the blue Add button to add it to the Description field.

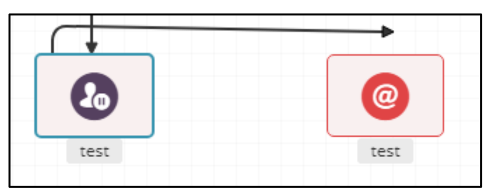
> **Priority:** This field allows you to set the priority of the task in the CRM. Choose the priority level of the task from the dropdown menu (Low, Normal, or High).

> **Pipeline Filter & Advancement:** Choose whether you would like contacts to progress through any pipelines you may have. In the dropdown menu in this field, choose the pipeline you would like contacts to be added to. A second dropdown will appear to choose the stage of that pipeline contacts will be added to at this point of the campaign. If you choose to set a pipeline stage to this element, an icon will appear on the bottom left corner of the element in your campaign to indicate that contacts will move through a pipeline stage at this point in your campaign.





- If there is an issue with the element that needs to be resolved before the element can be activated, there will be a yellow or red exclamation point symbol in the top right corner of the element to signify this. If this is the case, when you select the element with your mouse, an additional section called Element Crosscheck will appear in the Settings Panel. The Element Crosscheck section will describe the issue with the element and provide instructions on how to resolve it.

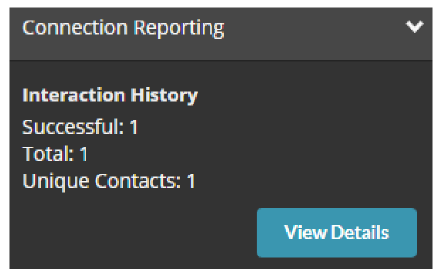


- To connect your Pause & Wait for CRM Task element to another element in your campaign, click the black target icon located on the top corner of your element and drag it over to the element you wish to connect it to.

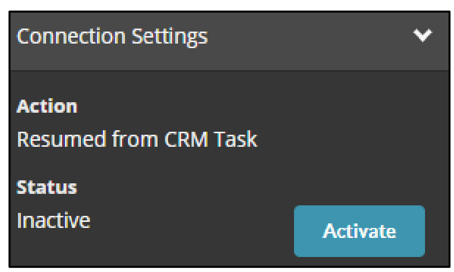
[**Note:** Some elements are not able to be connected to each other. For example, you cannot connect two Starting Point elements to each other, and you cannot connect a Starting Point element to the Contact Changed, Start from CRM, or Inbound API elements.]

- Click the green Create button to connect the two elements or the gray Close button to close the sidebar without connecting the two elements.

- Once a connection has been established between the Pause & Wait for CRM Task element and at least one other element, a textbox with the connection type will appear on the line. Click on this textbox to open two new sections in the Settings Panel, Connection Reporting and Connection Settings.



- The Connection Reporting section contains the Interaction History. When you first create the connection, it will only show that there have been no interactions. Once the connection has triggered at least once, you will see more information. Interaction History will then show the number of Successful (and Unsuccessful, if any) triggers, the Total number of triggers, and the number of Unique Contacts who have triggered the trigger.
- The View Details button, when selected, will open the Connection History Sidebar, allowing you to see the history of all the interactions associated with the element. See the section on Interaction History for more information.



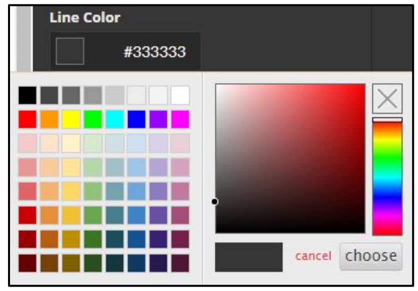
- The first Connection Settings field is the Action field, which indicates the connection type (Resumed from CRM Task).
- The second field is the Description field which will display a short description for when the connection will be triggered.
- The third field is the Status field where you can activate or deactivate the connection by clicking the blue or red button respectively. Activating a connection means that the connection will be able to be used as part of the campaign and should perform as expected.

[**Note:** Keep in mind the connection will not become active until you save the campaign.]

- The last field is the Line Color field where you can choose the color for that connection's line.

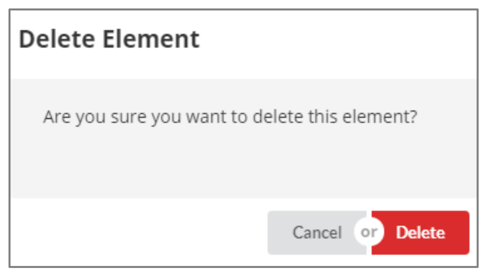
To choose a color:

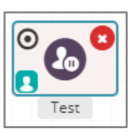
> Click on the color square in the field and a color selector will appear or enter the hex code of the color in the field next to the square.
> Choose your desired color from the pre-set swatches on the left side of the selector dropdown or use the right side to manually choose a color.
> Click the Choose 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.



- To copy a connection, hover your mouse over the textbox appearing on the connection to show a blue button at the top left of the textbox. Copying a connection saves you from having to re-configure the settings for any additional connections requiring the same conditions, saving time. Click and drag this button to create a new connection that can be attached to a new element. All connection settings configured in the initial connection will be copied over to the new connection.

- Delete a connection by hovering over the connection's textbox and clicking the red "X" button.
- To delete the element from the campaign, hover your mouse over the element and click the red "X" button in the top right corner that appears. A pop-up window will appear asking you to confirm the deletion. Click the red Delete button to complete the deletion or Cancel to close the window without deleting the element.





[**Note:** You will only receive the confirmation pop-up if the element has been activated or if the campaign has been saved.]

Completing a Pause & Wait for CRM Task

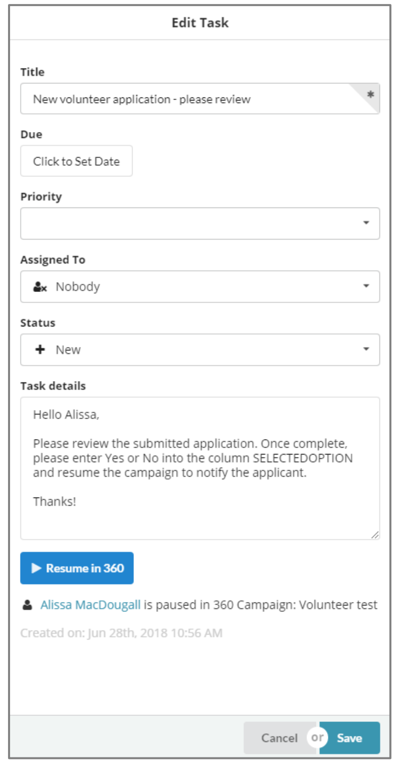
Once a contact has reached the Pause & Wait for CRM Task element in the 360 campaign, the user who has been selected as the account manager for the campaign will receive an email. This email will indicate that a new contact has been paused in the campaign and requires an


The contact 'Alissa MacDougall' was paused in your 360 campaign: 'Volunteer test'.

See this task: http://[redacted].com/?q=crm/crm#/tasks?action=viewTask&taskId=13

action to be completed before resuming their journey. This email will include a link to the CRM that must be completed by the designated SimplyCast account user.

From here, the designated SimplyCast account user must:

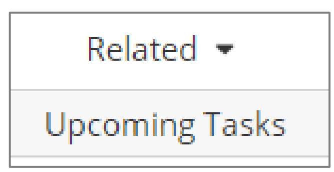


- Click the link in the task notification email to be directed to the SimplyCast CRM's Tasks section where they can view the details of the task in a sidebar.
- Review the task. There are three fields in the task sidebar to pay particular attention to:

  > **Task Details:** The message created in the Description field in the Settings Panel for the Pause & Wait for CRM Task element in the SimplyCast 360 campaign. This field will provide the account manager with instructions to complete the task.
  > **Resume in 360:** A blue button to be clicked once the task has been completed that will resume the contact's journey through the SimplyCast 360 campaign.
  > **Contact Icon:** Below the Resume in 360 button, there is an icon of a person and a hyperlink of their name. Click the name to be taken to the profile.

- When the task has been completed and the contact resumed in the SimplyCast 360 campaign, click the blue Save button at the bottom of this sidebar to close the sidebar or click Cancel to close the sidebar without saving any changes.

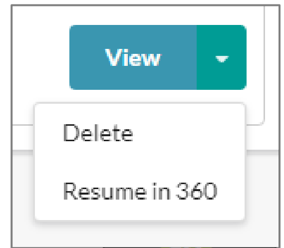
To resume a contact in SimplyCast 360 from a contact profile page:



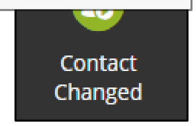
- In a contact 's profile, locate and click the Related tab at the top of the screen and select Upcoming Tasks from the dropdown menu that appears.
- Locate the name of the task you would like to complete for the contact and click the arrow next to the blue View button.

- Select the Resume in 360 option from the dropdown menu.
- A message will appear saying Task Resumed to confirm the contact has been accurately resumed.

[**Note:** Refer to the *SimplyCast CRM User Guide* to learn more about Tasks.]



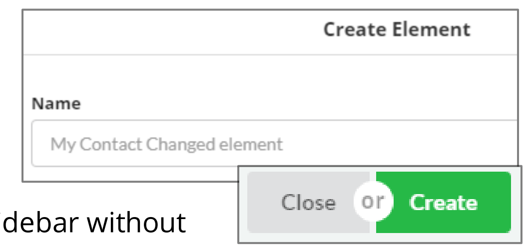
Contact Changed



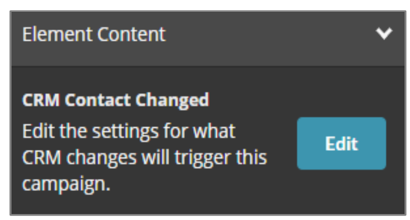
The next drag-and-drop element in the Contact Relationship tab is the Contact Changed element. This element allows you to trigger contacts to be sent through a campaign whenever a pre-determined information field in the contact's CRM profile is modified.

To begin setting up this element:

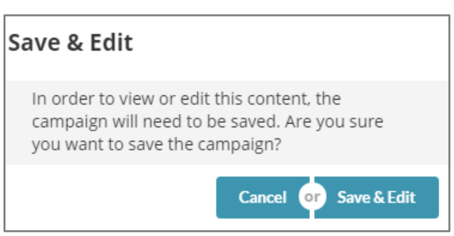
- Click and drag the Contact Changed element or double click to add it to the canvas.
- When you place the element, a sidebar will appear where you will be asked to enter a name for the new element. Type the name into the textbox provided.
- Click the green Create button to create the new element or click the gray Close button to close the sidebar without creating the new element.



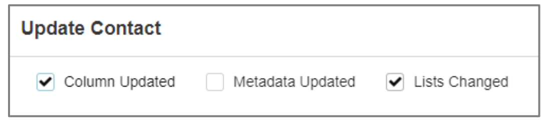
- Once you have placed the element onto the canvas and have it selected with your mouse, four additional fields will appear in the Settings Panel on the right-hand side of your screen:



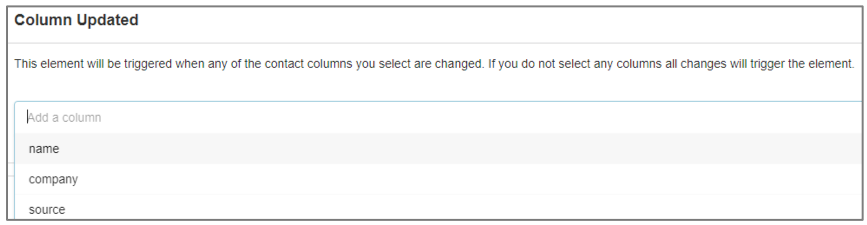
  > **CRM Contact Changed:** Clicking the blue Edit button in this field will produce a pop-up window asking you to save your progress before being redirected to the Contact Changed Configuration page. Click the blue Save & Edit button to save your campaign and be redirected or click Cancel to close the pop-up window without configuring the Contact Changed element. On the configuration page, you can select what CRM information needs to change in order to trigger the element in the campaign. The Contact Changed Configuration page contains four sections:



>> **Update Contact:** In this section, choose the type of CRM data that must be changed in order to trigger the element. Your options are Column Updated (a column in the CRM has been updated with new information), Metadata Updated (a piece of a contact's interaction data – such as Email Clicks – has been updated), and Lists Changed (one or more contacts have been added or removed from a selected contact list). Select one, two, or all three of these options if you'd like.



>> **Column Updated:** If you chose the Column Updated option in the Update Contact section, you now need to choose which CRM columns will trigger the element when changed. If you don't choose specific columns, then any changes made to any columns will trigger the element.

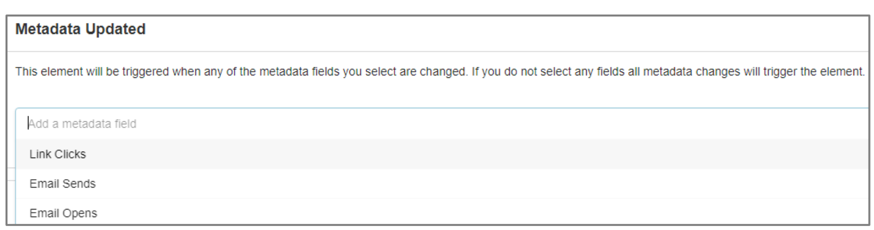


To choose one or multiple CRM columns:

- Click the dropdown menu in the Column Updated field. The dropdown will contain all the columns in your CRM, including any custom columns that have been created.
- Select as many CRM columns as you like from the dropdown. Selected columns will appear in boxes below the dropdown and can be removed by clicking the small "X" icon beside the name of the column you wish to deselect.

- Scroll down the list in the dropdown to find more columns that can be displayed at once or type the name of the specific column you want to find. The list will filter as you type.

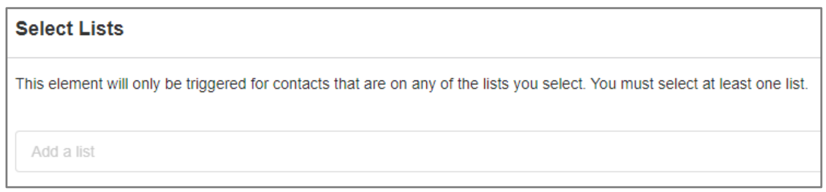
>> **Metadata Updated:** If you chose the Metadata Updated option in the Update Contact field, you will now need to choose what specific piece of CRM metadata will trigger the element when it is changed. If you don't choose a specific piece of metadata, then any changes made to any pieces of metadata will trigger the element.



To choose one or multiple pieces of metadata:

- Click the dropdown menu in the Metadata Updated field. The dropdown will list all metadata options available.
- Select as many pieces of CRM metadata as you like from the dropdown. Selected metadata will appear in boxes below the dropdown and can be removed by clicking the small "X" icon beside the name of the metadata you wish to deselect.
- Scroll down the list in the dropdown to find more metadata options that can be displayed at once or type the name of the specific CRM metadata you want to find. The list will filter as you type.

>> **Select Lists:** If you chose the Lists Changed option in the Update Contact field, you will now need to choose which contact lists in the CRM will trigger the element when changed.



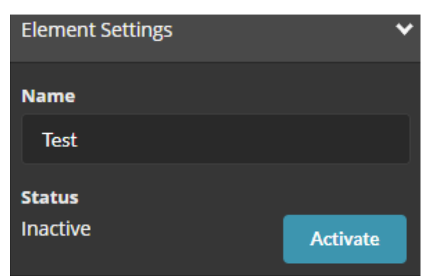
To do so:

- Click the dropdown menu in the Select Lists field. The dropdown will list all the available contact lists in your CRM.
- Select as many lists as you like from the dropdown. Selected lists will appear in boxes below the dropdown and can be removed by clicking the small "X" icon beside the name of the lists you wish to deselect.
- Scroll down the list in the dropdown to find more lists that can be displayed at once or type the name of the specific lists you want to find. The list will filter as you type.

[**Note:** Once you have selected the CRM data that will trigger the element when changed, click the blue Next button to return to the Automation Flow Editor. If you use the Contact Changed on its own, it will trigger if the selected column/metadata is changed to anything. You can use a Decision element to specify what the specified column/metadata should be changed to in order to trigger the Contact Changed element.]

> **Name:** This field contains the name you selected when you added the element to the canvas. To change the name of your element, edit the name in the textbox provided**.**

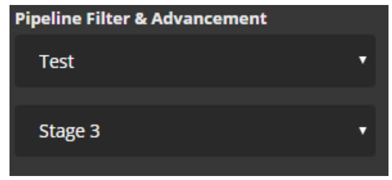
> **Status:** This field is where you can activate or deactivate the element by clicking the blue or red button respectively. Activating an element means that

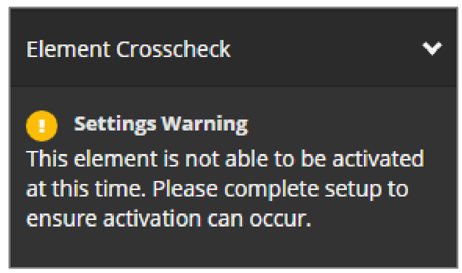


the element will be able to be used as part of the campaign and should perform as expected.

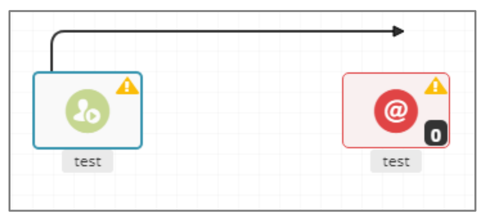
[**Note:** Keep in mind the element will not become active until you save the campaign.]

> **Pipeline Filter & Advancement:** Choose whether you would like contacts to progress through any pipelines you may have associated with the campaign. In the dropdown menu in this field, choose the pipeline you would like contacts to be added to. A second dropdown will appear to choose the stage of that pipeline contacts will be added to at this point of the campaign. If you choose to set a pipeline stage to this element, an icon will appear on the bottom left corner of the element in your campaign to indicate that contacts will move through a pipeline stage at this point in your campaign.



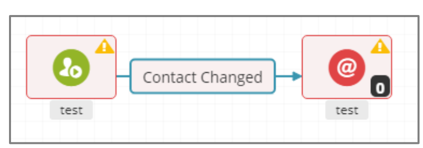


- If there is an issue with the element that needs to be resolved before the element can be activated, there will be a yellow or red exclamation point symbol in the top right corner of the element to signify this. If this is the case, when you select the element with your mouse, an additional section called Element Crosscheck will appear in the Settings Panel. The Element Crosscheck section will describe the issue with the element and provide instructions on how to resolve it.
- To connect your Contact Changed element to another element in your campaign, click the black target icon located on the top corner of your element and drag it over to the element you wish to connect it to.



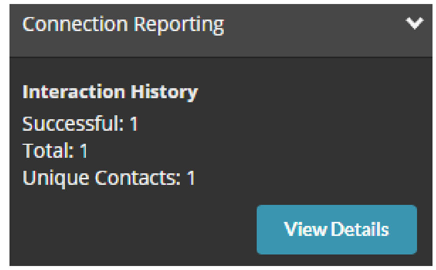
[**Note:** Some elements are not able to be connected to each other. For example, you cannot connect two Starting Point elements to each other, and you cannot connect a Starting Point element to the Contact Changed, Start from CRM, or Inbound API elements.]

- Click the green Create button to connect the two elements or the gray Close button to close the sidebar without connecting the two elements.
- Once a connection has been established between the Contact Changed element and at least one other element, a textbox with the connection type will appear on the line.

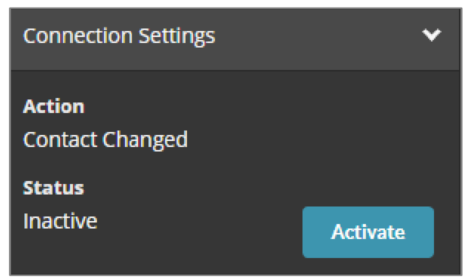


Click on this textbox to open two new sections in the Settings Panel, Connection Reporting and Connection Settings.

- The Connection Reporting section contains the Interaction History. When you first create the connection, it will only show that there have been no interactions. Once the connection has triggered at least once, you will see more information. Interaction History will then show the number of Successful (and Unsuccessful, if any) triggers, the Total number of triggers, and the number of Unique Contacts who have triggered the trigger.



- The View Details button, when selected, will open the Connection History Sidebar, allowing you to see the history of all the interactions associated with the element. See the section on Interaction History for more information.
- The first Connection Settings field is the Action field, which indicates the connection type (Contact Changed).
- The second field is the Description field which will display a short description for when the connection will be triggered.



- The third field is the Status field where you can activate or deactivate the connection by clicking the red or blue button respectively. Activating a connection means that the connection will be able to be used as part of the campaign and should perform as expected.

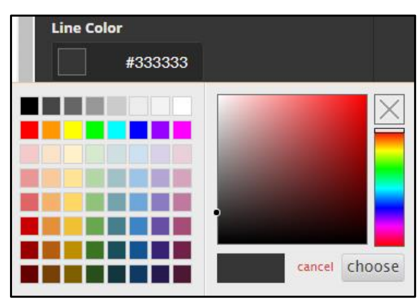
[**Note:** Keep in mind the connection will not become active until you save the campaign.]

- The last field is the Line Color field where you can choose the color for that connection's line.

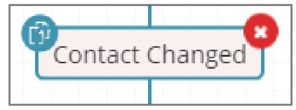
To choose a color:

> 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.

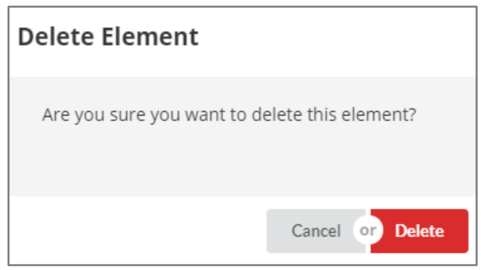
> Choose your desired color from the pre-set swatches on the left side of the selector dropdown or use the right side to manually choose a color.



> 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.

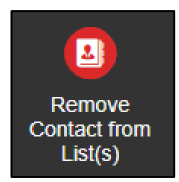


- To copy a connection, hover your mouse over the textbox appearing on the connection to show a blue button at the top left of the textbox. Copying a connection saves you from having to re-configure the settings for any additional connections requiring the same conditions, saving time. Click and drag this button to create a new connection that can be attached to a new element. All connection settings configured in the initial connection will be copied over to the new connection.
- Delete a connection by hovering over the connection's textbox and clicking the red "X" button.
- To delete the element from the campaign, hover your mouse over the element and click the red "X" button in the top right corner that appears. A pop-up window will appear asking you to confirm the deletion. Click the red Delete button to complete the deletion or Cancel to close the window without deleting the element.



[**Note:** You will only receive the confirmation pop-up if the element has been activated or if the campaign has been saved.]

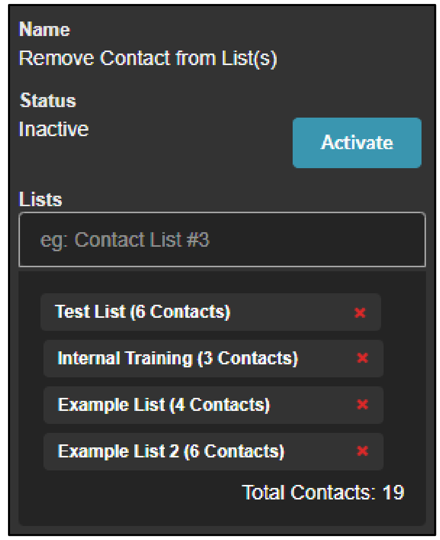
Remove Contact From List(s)



The next drag-and-drop element in the Contact Relationship tab is the Remove Contact From List(s) element. This element allows you to remove contacts from one or more CRM lists based on actions they have performed or input they submitted earlier in the campaign.

To begin setting up this element:

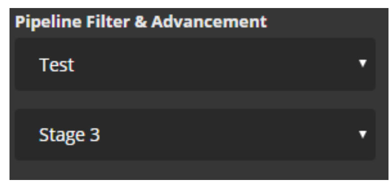
- Click and drag the Remove Contact From List(s) element or double click it to add it to the canvas.
- Once you have placed the element onto the canvas and have it selected with your mouse, four additional fields will appear in the Element Settings section on the right-hand side of your screen:

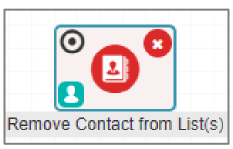


> **Name:** This field contains the name of the element you added, which cannot be changed.
> **Status:** This field is where you can activate or deactivate the element by clicking the blue or red button respectively. Activating an element means that the element will be able to be used as part of the campaign and should perform as expected.

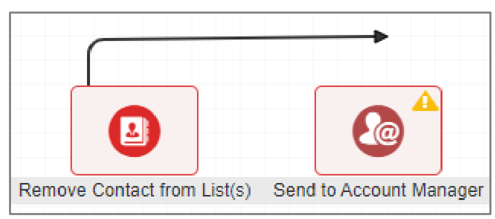
[**Note:** Keep in mind the element will not become active until you save the campaign.]

> **Lists:** This field will allow you to select which contact list(s) to remove the contact from once they reach this stage of the workflow. Choose one or more contact lists from this dropdown. The chosen lists will appear below the field. Deselect any lists by clicking the red "X" button next to any of the lists in this section.
> **Pipeline Filter & Advancement:** Choose whether you would like contacts to progress through any pipelines you may have. In the dropdown menu in this field, choose the pipeline you would like contacts to be added to. A second dropdown will appear to choose the stage of that pipeline contacts will be added to at this point of the campaign. If you choose to set a pipeline stage to this element, an icon will appear on the bottom left corner of the element in your campaign to indicate that contacts will move through a pipeline stage at this point in your campaign.



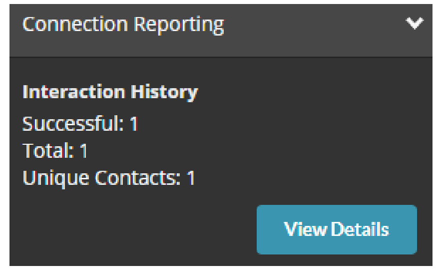


- To connect your Remove Contact From List(s) element to another element in your campaign, click the black target icon located on the top corner of your element and drag it over to the element you wish to connect it to.

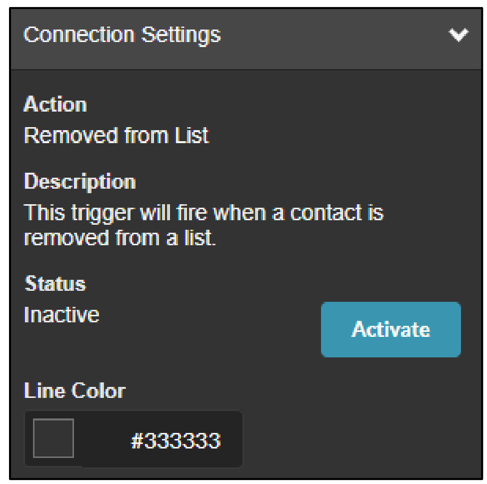


[**Note:** Some elements are not able to be connected to each other. For example, you cannot connect two Starting Point elements to each other, and you cannot connect a Starting Point element to the Contact Changed, Start from CRM, or Inbound API elements.]

- Once a connection has been established between the Contact List element and at least one other element, a textbox with the connection type will appear on the line. Click on this textbox to open two new sections in the Settings Panel, Connection Reporting and Connection Settings.



- The Connection Reporting section contains the Interaction History. When you first create the connection, it will only show that there have been no interactions. Once the connection has triggered at least once, you will see more information. Interaction History will then show the number of Successful (and Unsuccessful, if any) triggers, the Total number of triggers, and the number of Unique Contacts who have triggered the trigger.
- The View Details button, when selected, will open the Connection History Sidebar, allowing you to see the history of all the interactions associated with the element. See the section on Interaction History for more information.

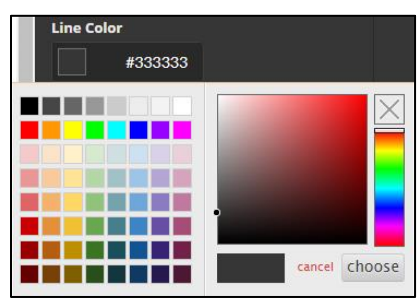


- The first Connection Settings field is the Action field, which indicates the connection type (Removed from List).
- The second field is a Description field which will contain a description of when the trigger will be fired.
- The next field is the Status field where you can activate or deactivate the connection by clicking the blue or red button respectively. Activating a connection means that the connection will be able to be used as part of the campaign and should perform as expected.

[**Note:** Keep in mind the connection will not become active until you save the campaign.]

- The last field is the Line Color field where you can choose the color for that connection's line.

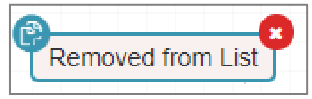
To choose a color:



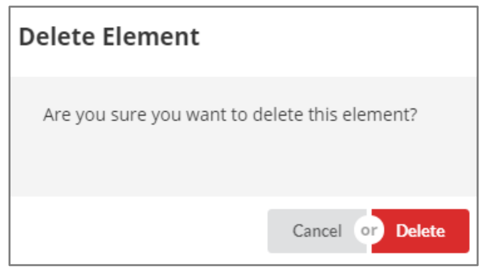
> Click on the color square in the field and a color selector will appear or enter the hex code of the color in the field next to the square.

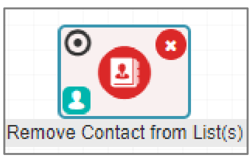
> Choose your desired color from the pre-set swatches on the left side of the selector dropdown or use the right side to manually choose a color.

> 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.



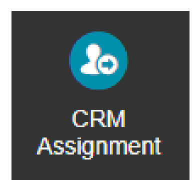
- To copy a connection, hover your mouse over the textbox appearing on the connection to show a blue button at the top left of the textbox. Copying a connection saves you from having to re-configure the settings for any additional connections requiring the same conditions, saving time. Click and drag this button to create a new connection that can be attached to a new element. All connection settings configured in the initial connection will be copied over to the new connection.
- Delete a connection by hovering over the connection's textbox and clicking the red "X" button.
- To delete the element from the campaign, hover your mouse over the element and click the red "X" button in the top right corner that appears. A pop-up window will appear asking you to confirm the deletion. Click the red Delete button to complete the deletion or Cancel to close the window without deleting the element.





[**Note:** You will only receive the confirmation pop-up if the element has been activated or if the campaign has been saved.]

CRM Assignment



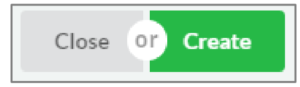
The next drag-and-drop element in the Contact Relationship tab is the CRM Assignment element. This element allows you to assign incoming contacts to a CRM list or account manager according to a configured ruleset.

To begin setting up this element:

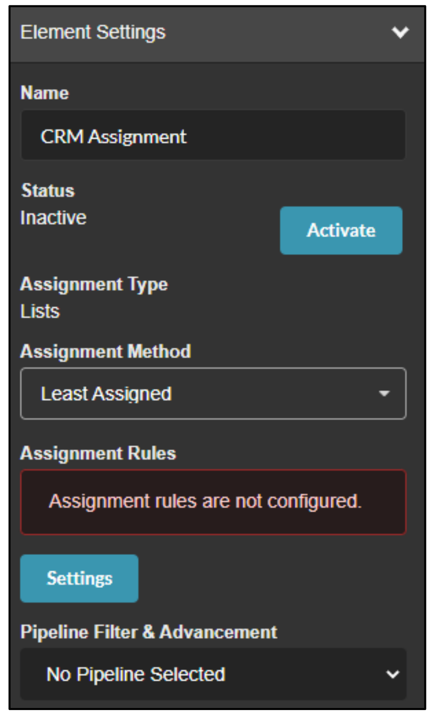
- Click and drag the Remove CRM Assignment element or double click it to add it to the canvas.
- When you place the element, a sidebar will appear where you will be asked to enter a name for the new element and choose the assignment function of the element. Type the name into the

textbox provided and choose whether you are assigning contacts to a list or to an account manager via the Type dropdown in this sidebar.

- Click the green Create button to create the new element or click the gray Close button to close the sidebar without creating the new element.



- Once you have placed the element onto the canvas and have it selected with your mouse, four additional fields will appear in the Element Settings section on the right-hand side of your screen:



> **Name:** This field contains the name of the checkpoint you created, that you can modify if desired by typing a new name into the field.

> **Status:** This field is where you can activate or deactivate the element by clicking the blue or red button respectively. Activating an element means that the element will be able to be used as part of the campaign and should perform as expected.

[**Note:** Keep in mind the element will not become active until you save the campaign.]

> **Assignment Type:** This field displays whether you chose to assign contacts to lists or to an account manager when you created the element. This field cannot be changed.

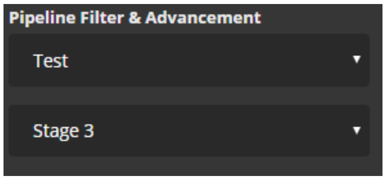
> **Assignment Method:** This field will allow you to select how you wish contacts to be assigned. Choose from one of the three options:

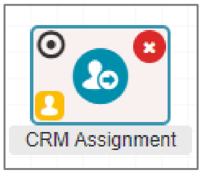
- **Round Robin:** This method will assign contacts to the available options one at a time until all options have received a contact, and then will begin going through the options again. Refer to the Assignment Rules section below for more information on creating an assignment rule for this method.
- **Priority Order:** This method will assign contacts to the first selected option until the capacity has been reached, and then will continue to assign contacts to the second listed option, third listed option, etc. Refer to the Assignment Rules section below for more information on creating an assignment rule for this method.
- **Least Assigned:** This method will assign contacts to the option that has the fewest contacts at the time of assignment. If two or more options have the fewest number of contacts, the one listed first in the ruleset will receive the

assignment. Refer to the Assignment Rules section below for more information on creating a ruleset for this method.

> **Assignment Rules:** This field contains a blue Settings button which, when clicked, will open a sidebar where you can define the ruleset for how contacts are assigned to each option using the chosen assignment method. Refer to the Assignment Rules section below for more information on creating rulesets.

> **Pipeline Filter & Advancement:** Choose whether you would like contacts to progress through any pipelines you may have. In the dropdown menu in this field, choose the pipeline you would like contacts to be added to. A second dropdown will appear to choose the stage of that pipeline contacts will be added to at this point of the campaign. If you choose to set a pipeline stage to this element, an icon will appear on the bottom left corner of the element in your campaign to indicate that contacts will move through a pipeline stage at this point in your campaign.





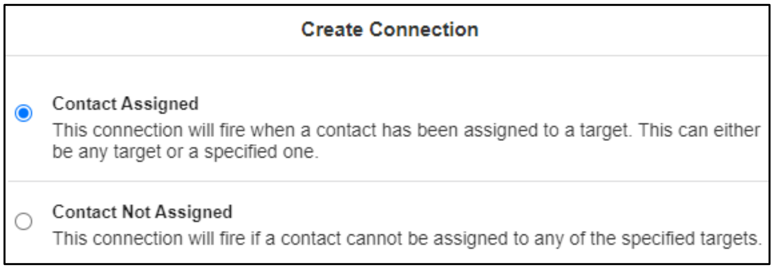
- To connect your Remove Contact From List(s) element to another element in your campaign, click the black target icon located on the top corner of your element and drag it over to the element you wish to connect it to.

[**Note:** Some elements are not able to be connected to each other. For example, you cannot connect two Starting Point elements to each other, and you cannot connect a Starting Point element to the Contact Changed, Start from CRM, or Inbound API elements.]

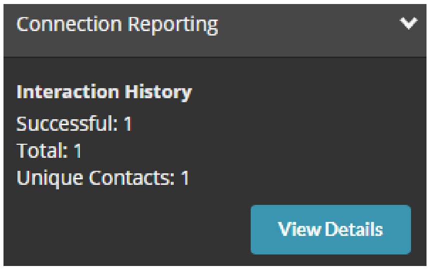
- A sidebar will appear where you can choose between two connection types:

> **Contact Assigned:** This means the campaign will continue through the connection when a contact has assigned to a list or account manager per the element's configurations.

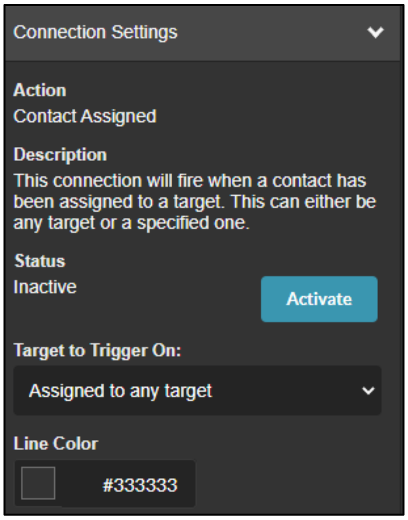
> **Contact Not Assigned:** This means the contact will pass through the connection if they are unable to be assigned to a list or account manager per the element's configurations.



- Once a connection has been established between the Contact List element and at least one other element, a textbox with the connection type will appear on the line. Click on this textbox to open two new sections in the Settings Panel, Connection Reporting and Connection Settings.
- The Connection Reporting section contains the Interaction History. When you first create the connection, it will only show that there have been no interactions. Once the connection has triggered at least once, you will see more information. Interaction History will then show the number of Successful (and Unsuccessful, if any) triggers, the Total number of triggers, and the number of Unique Contacts who have triggered the trigger.

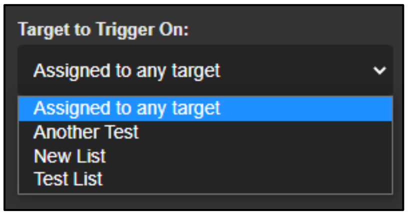


- The View Details button, when selected, will open the Connection History Sidebar, allowing you to see the history of all the interactions associated with the element. See the section on Interaction History for more information.
- The first Connection Settings field is the Action field, which indicates the connection type: Contact Assigned or Contact Not Assigned.
- The second field is a Description field which will contain a description of when the trigger will be fired.
- The next field is the Status field where you can activate or deactivate the connection by clicking the blue or red button respectively. Activating a connection means that the connection will be able to be used as part of the campaign and should perform as expected.



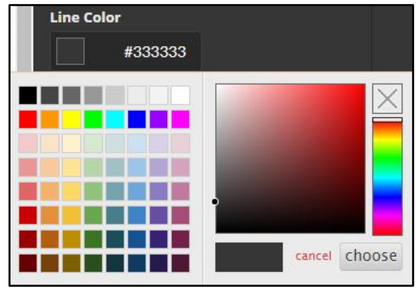
[**Note:** Keep in mind the connection will not become active until you save the campaign.]

- The next field is the Target to Trigger On field, where you are able to specify whether the trigger only progresses contacts along a certain branch of the workflow if they have been assigned to a specific list or account manager. By default, this field is set so that any contacts who have been assigned to any targets will be triggered to progress in the workflow, but if you wish to only trigger certain contacts based on the account manager or list they were assigned to, click this field and choose from the options that appear in the dropdown menu.

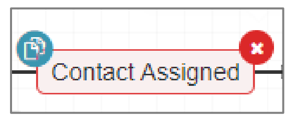


- The last field is the Line Color field where you can choose the color for that connection's line.

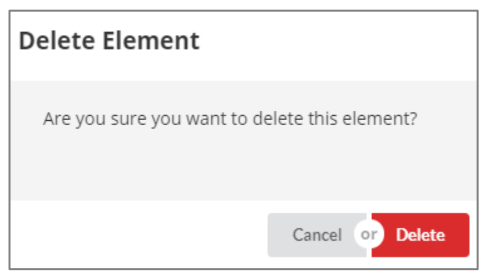
To choose a color:



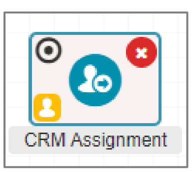
- Click on the color square in the field and a color selector will appear or enter the hex code of the color in the field next to the square.
- Choose your desired color from the pre-set swatches on the left side of the selector dropdown or use the right side to manually choose a color.
- Click the Choose 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.



- To copy a connection, hover your mouse over the textbox appearing on the connection to show a blue button at the top left of the textbox. Copying a connection saves you from having to re-configure the settings for any additional connections requiring the same conditions, saving time. Click and drag this button to create a new connection that can be attached to a new element. All connection settings configured in the initial connection will be copied over to the new connection.



- Delete a connection by hovering over the connection's textbox and clicking the red "X" button.
- To delete the element from the campaign, hover your mouse over the element and click the red "X" button in the top right corner that appears. A pop-up window will appear asking you to confirm the deletion. Click the red Delete button to complete the deletion or Cancel to close the window without deleting the element.



[**Note:** You will only receive the confirmation pop-up if the element has been activated or if the campaign has been saved.]

Assignment Rules

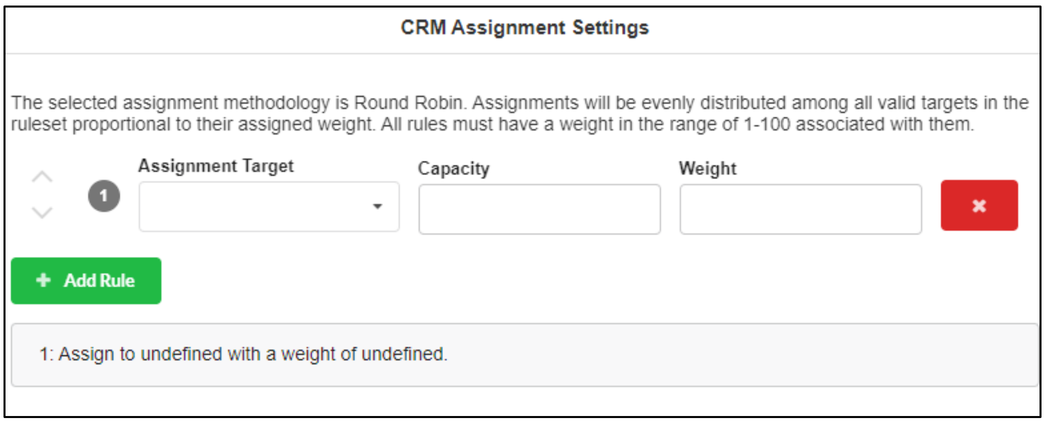
The Assignment Rules field in the CRM Assignment element's settings contains a blue Settings button that will produce a sidebar from the right of the screen where you can build the ruleset(s) for how contacts will be assigned to a list or account manager based on the chosen assignment method: Round Robin, Priority Order, and Least Assigned.

Click the green Add Rule button in this sidebar to begin creating a ruleset for the chosen method.

Round Robin

After clicking the green Add Rule button for the Round Robin assignment method, a field set containing three fields will appear.

From here:

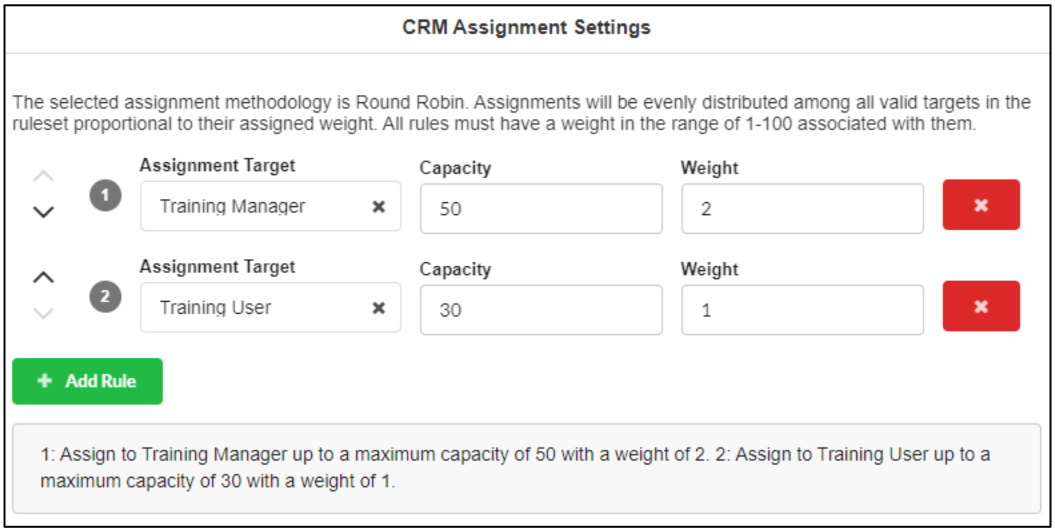


- Choose the assignment target from the first dropdown. The dropdown will contain the available lists or account managers, depending on the assignment type you chose when creating the element.
- In the Capacity field, optionally choose the maximum number of contacts that can be assigned to a list/account manager at one time.
- The Weight field allows you to assign a weight value to your ruleset. This is a mandatory field as it defines the capability of the assignment target to handle new assignments. The higher the weight, the more capable the list/account manager is of accepting new assignments.

[**Note:** For example, say you are assigning contacts among three different account managers (AM1, AM2, and AM3). This means you need to create a ruleset for each account manager. In these rulesets, AM1 is given a weight of 3, AM2 is given a weight of 2, and AM3 is given a weight of 4. When the element is activated and contacts reach the CRM Assignment element, the system will assign the first three contacts to AM1, the next two contacts to AM2, and the next four contacts will be assigned to AM3. Then the system will return to AM1, assigning the next three contacts to them, and so on.]

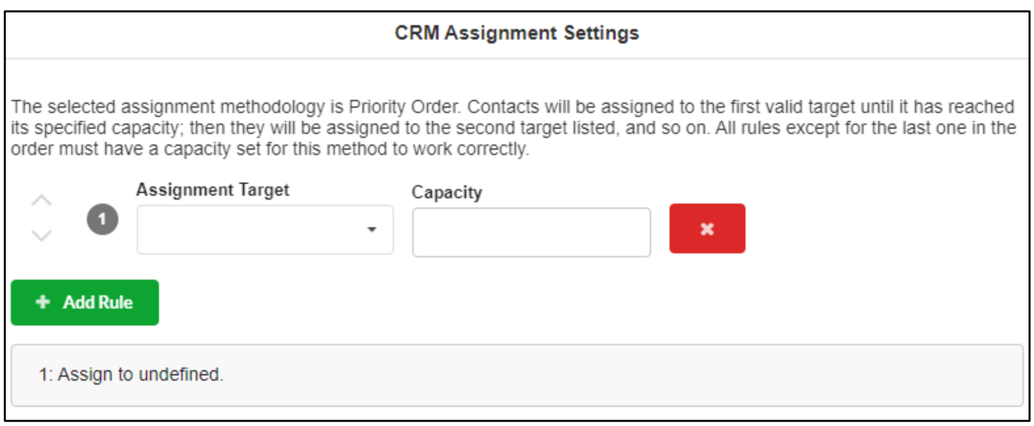
- Create additional rulesets as needed and order them using the arrow buttons located to the left of each ruleset.
- Delete any rulesets by clicking the red “X” button located to the right of the ruleset.

- When you have finished creating and ordering your Round Robin ruleset(s), click the blue Confirm button at the bottom of the sidebar to save the rulesets and close the sidebar. Alternatively, click the gray Cancel button to close the sidebar without creating any rulesets.
- The configured rulesets will now appear in the Assignment Rules field in the CRM Assignment element's settings menu.



Priority Order

After clicking the green Add Rule button for the Priority Order assignment method, a field set containing two fields will appear.

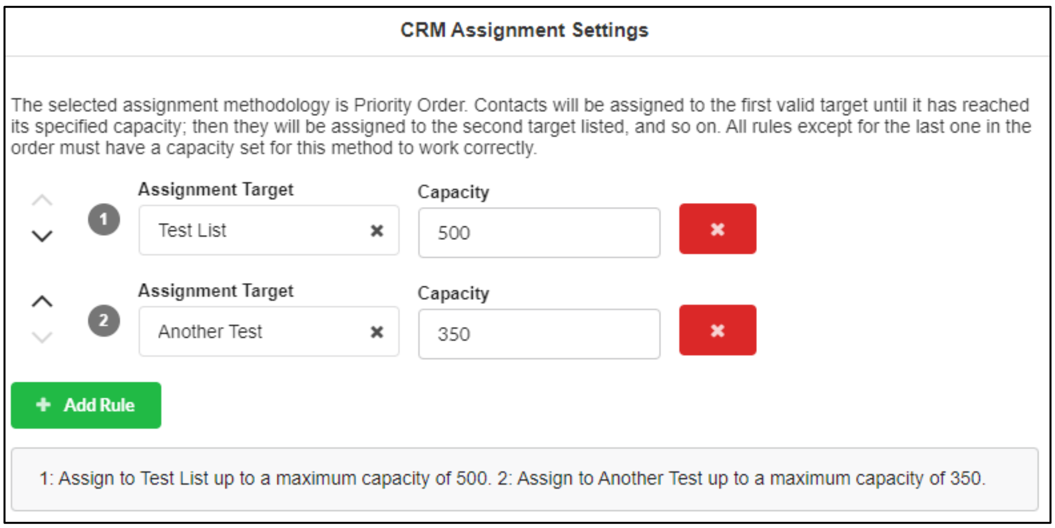


From here:

- Choose the assignment target from the first dropdown. The dropdown will contain the available lists or account managers, depending on the assignment type you chose when creating the element.

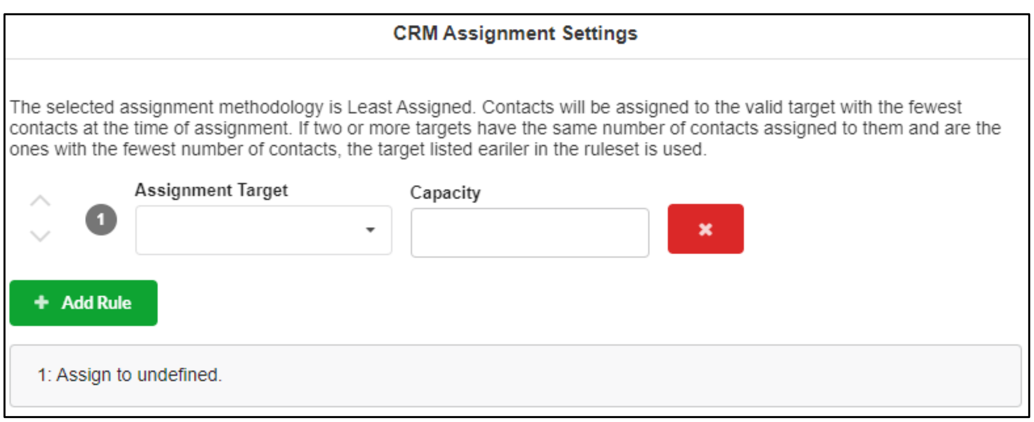
- In the Capacity field, optionally choose the maximum number of contacts that can be assigned to a list/account manager at one time.
- Create additional rulesets as needed and order them using the arrow buttons located to the left of each ruleset.
- Delete any rulesets by clicking the red "X" button located to the right of the ruleset.
- When you have finished creating and ordering your Priority Order ruleset(s), click the blue Confirm button at the bottom of the sidebar to save the rulesets and close the sidebar. Alternatively, click the gray Cancel button to close the sidebar without creating any rulesets.

- The configured rulesets will now appear in the Assignment Rules field in the CRM Assignment element's settings menu.



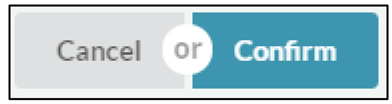
Least Assigned

After clicking the green Add Rule button for the Least Assigned assignment method, a field set containing two fields will appear.

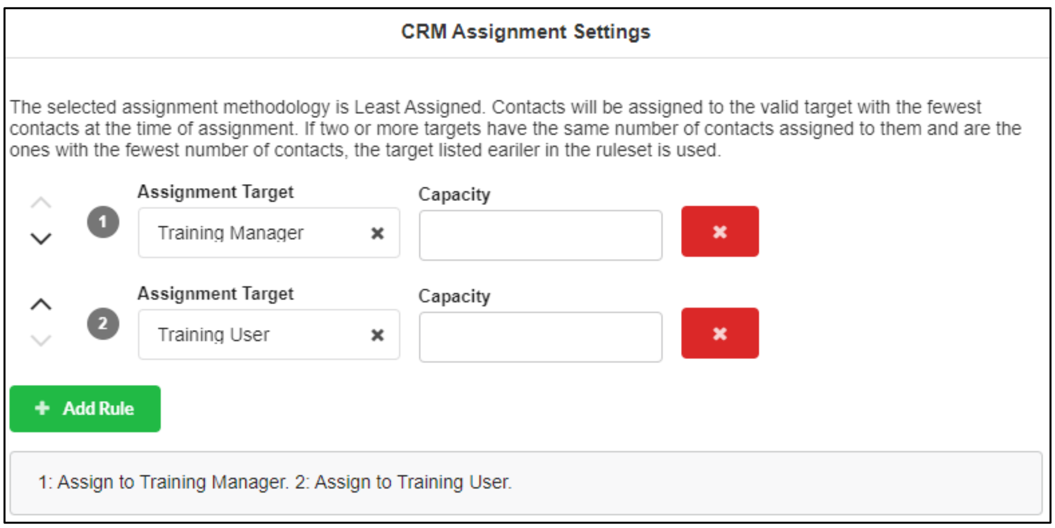


From here:

- Choose the assignment target from the first dropdown. The dropdown will contain the available lists or account managers, depending on the assignment type you chose when creating the element.
- In the Capacity field, optionally choose the maximum number of contacts that can be assigned to a list/account manager at one time.
- Create additional rulesets as needed and order them using the arrow buttons located to the left of each ruleset.
- Delete any rulesets by clicking the red "X" button located to the right of the ruleset.
- When you have finished creating and ordering your Least Assigned ruleset(s), click the blue Confirm button at the bottom of the sidebar to save the rulesets and close the sidebar. Alternatively, click the gray Cancel button to close the sidebar without creating any rulesets.



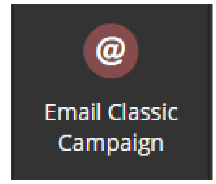
- The configured rulesets will now appear in the Assignment Rules field in the CRM Assignment element's settings menu.



Classic

The next tab in the Creation Panel on the left side of the screen is the Classic tab. This tab contains the Email element, which is the older version of the current Email Editor that is still supported in the SimplyCast application.

Email Classic Campaign

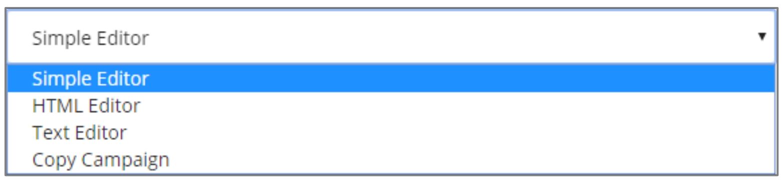


The only drag-and-drop element in the Campaigns tab is the Email Classic Campaign Element. This element allows you to create and send an email created using the legacy Email Editor to your contacts when they reach a particular point in the campaign.

To begin setting up this element:

- Click and drag the Email element or double click to add it to your canvas.
- When you place the element, a sidebar will appear with two fields. The first field will ask you to choose the type of email to create from the dropdown menu in the Type field:

  > **Simple Editor:** An email campaign created using the Simple Editor: using drag-and-drop elements to create the email.
  >
  > **HTML Editor:** An email campaign created using the Advanced HTML Editor: using HTML to create the email campaign.
  >
  > **Text Editor:** An email campaign created using the Text Editor: using plain text to create the email campaign.

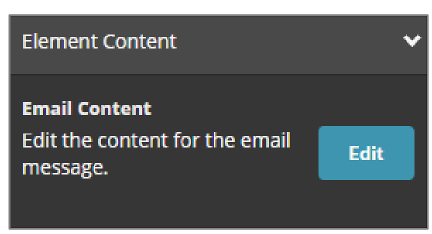


  > **Copy Campaign:** An email campaign created by copying an existing project. Choosing this option will create another field in the pop-up window where you must select the existing email campaign you would like to copy from the dropdown list.

- The second field will ask you to enter a name for the new Email element. Enter a name into the field provided.
- Click the green Create button to create the element and close the sidebar. Or, click the gray Cancel button to close the sidebar without adding an Email Campaign element.

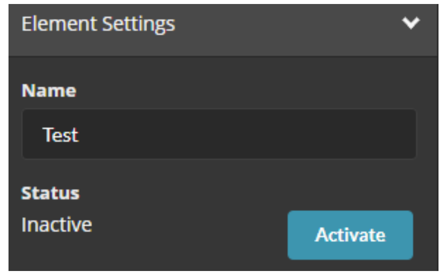
- Once you have placed the element onto your canvas and have it selected with your mouse, four additional fields will appear in the Settings Panel on the right-hand side of the screen:

  > **Email Content:** Clicking the blue Edit button in the Element Content section will bring you to the Email application, where you can design, create, and edit the content and settings of the email. Refer to the



SimplyCast Email User Guide for more information about creating and editing email campaigns.

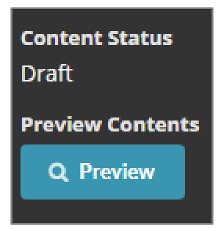
> **Name:** This field contains the name you selected when you added the element to your canvas. To change the name of your element, edit the name in the textbox provided.



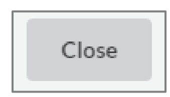
> **Status:** This field is where you can activate or deactivate the element by clicking the blue or red button respectively. Activating an element means that the element will be able to be used as part of the campaign and should perform as expected.

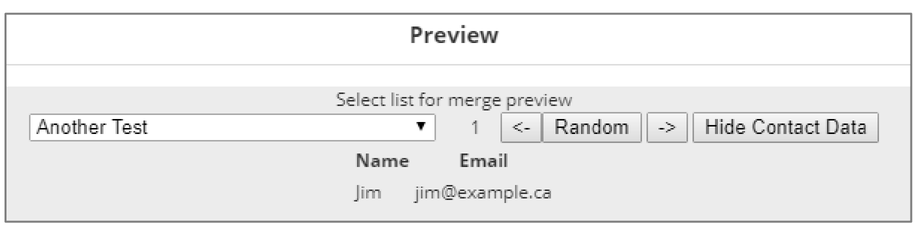
[**Note:** Keep in mind the element will not become active until you save the campaign.]

> **Content Status:** Once you have saved the SimplyCast 360 campaign after adding the Email element, you will see the Content Status field in the Settings Panel below the Status field. This field will provide you with the current state of the email campaign's content depending on how far you have progressed through the setup process (e.g. Draft, Pending Approval, etc.).



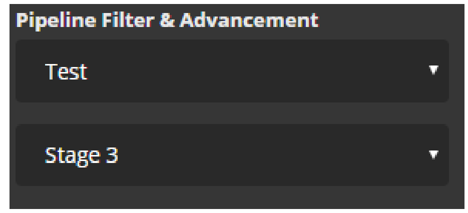
> **Preview Contents:** Once you have saved the SimplyCast 360 campaign after adding the Email element, you will be able to preview the content of the email by clicking the blue Preview button appearing in this field. A sidebar will open where you are able to view the email content (if any has been added) as well as view a merged preview of the email that will show you how any added merge tags will appear once the email is sent. To view the merged preview, select a contact list from your CRM in the dropdown field at the top of the sidebar, and then select the Random button that appears to view the random contact from the list whose information will be merged into the email preview. The arrow buttons on either side of the Random button will choose another contact at random from the list. The Show Contact Data button on the right will provide you with the basic contact details (name and primary contact information) for each contact from the list. Click the Close button at the bottom of the sidebar to close the window and return to the SimplyCast 360 campaign.



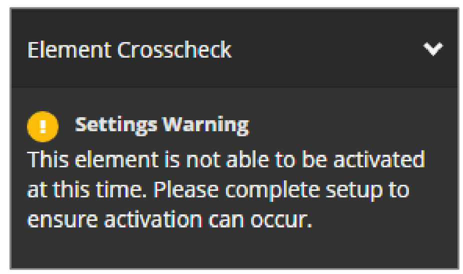


> **Subject Line:** Once you have finished the email campaign setup, the Subject Line field will appear in the Settings Panel below the blue Preview Contents button, containing the subject line you have included in the email setup.

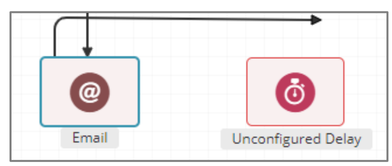
> **Pipeline Filter & Advancement:** Choose whether you would like contacts to progress through any pipelines you may have associated with the campaign. In the dropdown menu in this field, choose the pipeline you would like contacts to be added to. A second dropdown will appear to choose the stage of that pipeline contacts will be added to at this point of the campaign. If you choose to set a pipeline stage to this element, an icon will appear on the bottom left corner of the element in your campaign to indicate that contacts will move through a pipeline stage at this point in your campaign.



- If there is an issue with the element setup that needs to be resolved before the element can be activated, there will be a yellow or red exclamation point symbol in the top right corner of the element to signify this. If this is the case, when you select the element with your mouse, an additional section called Element Crosscheck will appear in the Settings Panel. The Element Crosscheck section will describe the issue with the element and provide instructions on how to resolve it.



- To connect your Email element to another element in your campaign, click the black target icon on the top corner of the element and drag it over to the element you wish to connect it to.

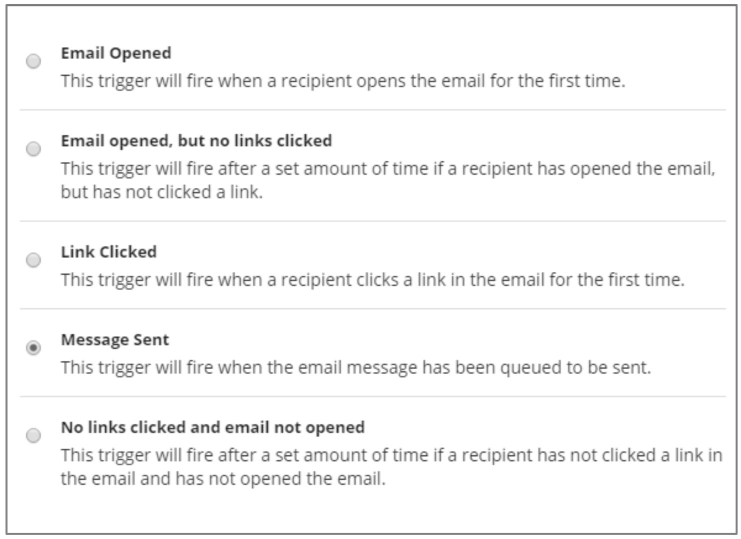


[**Note:** Some elements are not able to be connected to each other. For example, you cannot connect two Starting Point elements to each other, and you cannot connect a Starting Point element to the Contact Changed, Start from CRM, or Inbound API elements.]

- A sidebar will appear where you can choose between five connection types:

> **Email Opened:** This means the campaign will continue through the connection when a recipient opens the email for the first time.

> **Email Opened, But No Links Clicked:** This means the campaign will continue through the connection after a set amount of time if a recipient has opened the email but has not clicked any links in it.

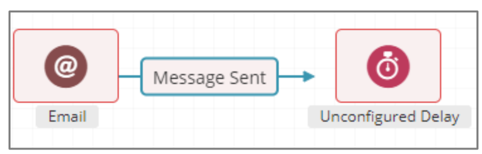


> **Link Clicked:** This means the campaign will continue through the connection when a recipient clicks a link (or a specific link) in the email for the first time.

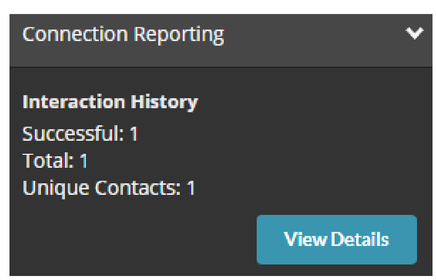
> **Message Sent:** This means the campaign will continue through the connection when the email message has been queued to be sent.

> **No Links Clicked and Email Not Opened:** This means the campaign will continue through the connection after a set amount of time if a recipient has not clicked a link in the email and has not opened the email.

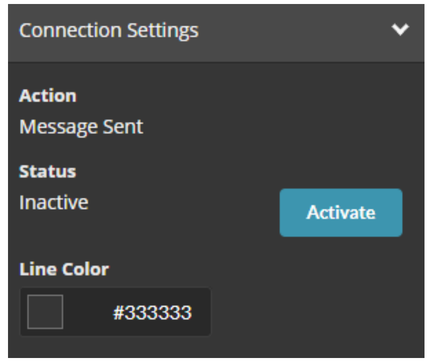
- Click the green Create button to connect the two elements or the gray Close button to close the sidebar without connecting the two elements.



- Once a connection has been established between the Email element and at least one other element, a textbox with the connection type will appear on the line.
- Click on this textbox to open two new sections in the Settings Panel, Connection Reporting and Connection Settings.



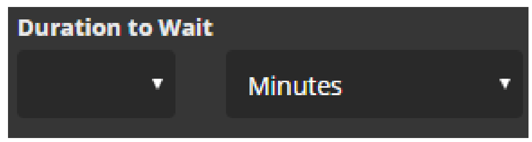
- The Connection Reporting section contains the Interaction History. When you first create the connection, it will only show that there have been no interactions. Once the connection has triggered at least once, you will see more information. Interaction History will then show the number of Successful (and Unsuccessful, if any) triggers, the Total number of triggers, and the number of Unique Contacts who have triggered the trigger.
- The View Details button, when selected, will open the Connection History Sidebar, allowing you to see the history of all the interactions associated with the element. See the section on



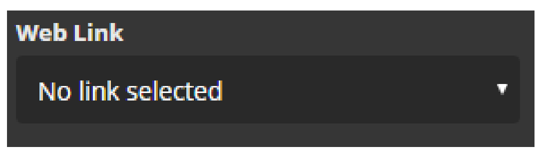
Interaction History for more information.Depending on the connection option you choose, there will be either three or four fields in the Connection Settings section. The first field is the Action field, which indicates the connection type selected (Email Opened; Email Opened, But No Links Clicked; Link Clicked; Message Sent; or No Links Clicked and Email Not Opened).

- The second field is the Description field which will display a short description for when the connection will be triggered.
- The next field is the Status field where you can activate or deactivate the connection by clicking the blue or red button respectively. Activating a connection means that the connection will be able to be used as part of the campaign and should perform as expected.

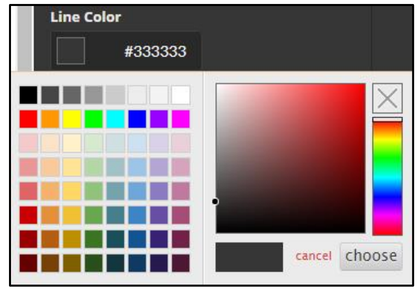
[**Note:** Keep in mind the connection will not become active until you save the campaign.]



- If you chose the “Email Opened, But No Links Clicked” or “No Links Clicked and Email Not Opened” option, the third field will be Duration to Wait. This is where you decide how long the system will wait for the email recipient to either open the email or click the link before triggering the connection. There are two dropdowns in this field, one where you choose a unit of time (minutes, hours, or days) and another where you choose the number of that time unit you want to wait. So, if you select “5” in the first dropdown and “Days” in the second dropdown, the system will wait five days for a recipient to open the email or click a link before firing the trigger.



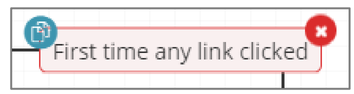
- If you chose the “Link Clicked” option, the third field will be Web Link. This is where you will select the link the recipient must click in order to fire the trigger. Only the links present in the current email will be available to choose from. Select the link to connect with this trigger from the dropdown menu provided. Alternatively, you can select “Any link clicked” from the dropdown, which means the trigger will fire if any link in the email is clicked; this trigger will only fire once.
- The final field is the Line Color field where you can choose the color for that connection’s line.



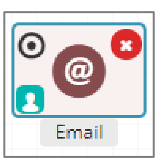
To choose a color:

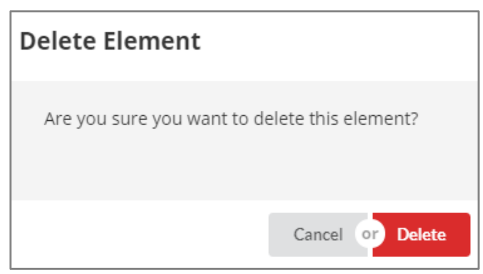
> Click on the color square in the field and a color selector will appear or enter the hex code of the color in the field next to the square.
> Choose your desired color from the pre-set swatches on the left side of the selector dropdown or use the right side to manually choose a color.
> Click the Choose 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.

- To copy a connection, hover your mouse over the textbox appearing on the connection to show a blue button at the top left of the textbox. Copying a connection saves you from having to re-configure the settings for any additional connections requiring the same conditions, saving time. Click and drag this button to create a new connection that can be attached to a new element. All connection settings configured in the initial connection will be copied over to the new connection.



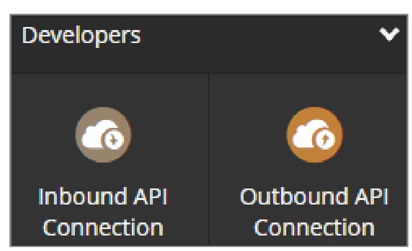
- Delete a connection by hovering over the connection's textbox and clicking the red "X" button.
- To delete the element from the campaign, hover your mouse over the element and click the red "X" button in the top right corner that appears. A pop-up window will appear asking you to confirm the deletion. Click the red Delete button to complete the deletion or Cancel to close the window without deleting the element.





[**Note:** You will only receive the confirmation pop-up if the element has been activated or if the campaign has been saved.]

Developers



The last tab in the Creation Panel on the left side of the screen is the Developers tab. The elements in this tab allow you to push, pull, and transfer data to and from the SimplyCast system and external sources. Connections enabling information to be received and sent through external parties must be configured through the

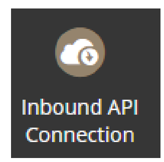
Integration Marketplace. Refer to the *SimplyCast Integrations Marketplace User Guide* for more information.

The elements in this tab are:

- **Inbound API Connection:** This element acts like a starting point for a SimplyCast 360 campaign which allows for the addition of inbound data to your campaign from another system that you would like to access in this campaign.
- **Outbound API Connection:** This element allows you to enable the SimplyCast platform to send outbound data to an outside platform, such as contact information to a CRM external to SimplyCast.

[**Note:** The elements in the Developers tab should only be used by advanced users with development experience. Refer to SimplyCast's API documentation for more information about setting up an API connection: https://app.simplycast.com/?q=api/index]

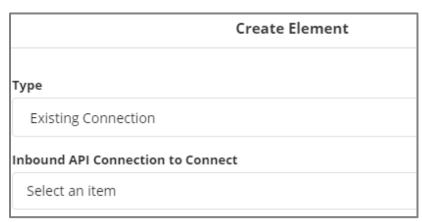
Inbound API Connection



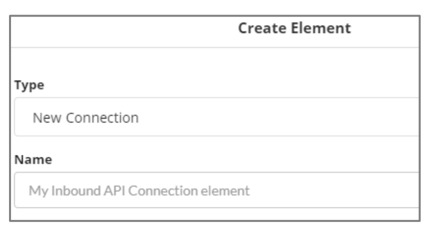
The first drag-and-drop element in the Developers tab is the Inbound API Connection element. This element acts like a starting point for a SimplyCast 360 campaign which allows for the addition of inbound data to your campaign from another system that you would like to access in this campaign.

To begin setting up this element:

- Click and drag the Inbound API Connection element or double click to add it to the canvas.
- When you place the element, a pop-up window will appear with two fields. The first field will ask you to choose the API type you wish to create from the dropdown menu, either a new API connection or an existing connection. If you choose to use an existing inbound API connection, a new field will appear in the pop-up where you can choose one of your existing inbound API connections from the dropdown list available.

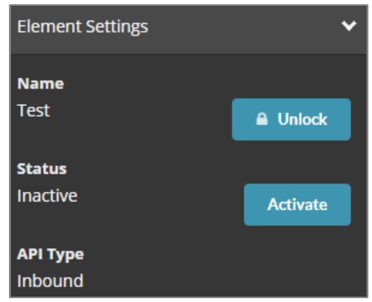


- If you choose to create a new API connection, the second field will ask you to enter a name for the new connection. Type the name into the textbox provided.



- Click the green Create button to create the new element or click the gray Close button to close the sidebar without adding the new element.

- Once you have placed the element onto the canvas and have it selected with your mouse, four additional fields will appear in the Element Settings section on the right-hand side of your screen:



> **Name:** This field contains the name you selected when you added the element to the canvas. By default, the name of the API connection will be locked. To unlock and change the name of the connection, click the blue Unlock button, then edit the name of the element in the textbox provided.

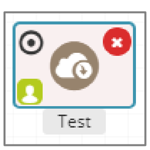
[**Note:** Keep in mind that changing the name of an API connection changes its name across the entire SimplyCast application, not just this campaign. For example, the same API connection can be used on multiple SimplyCast 360 canvases, therefore if it is renamed in one campaign, the new name will also appear in every other campaign it is found in.]

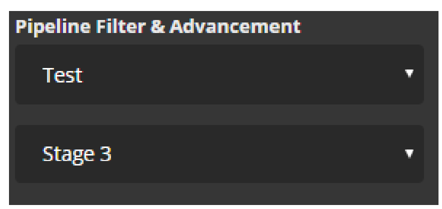
> **Status:** This field is where you can activate or deactivate the element by clicking the blue or red button respectively. Activating an element means that the element will be able to be used as part of the campaign and should perform as expected.

[**Note:** Keep in mind the element will not become active until you save the campaign.]

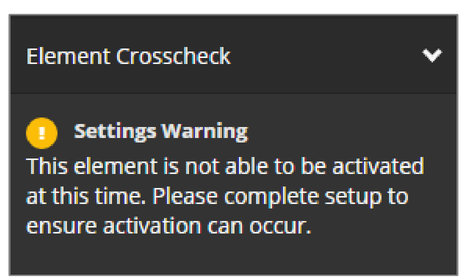
> **API Type:** This field states that the API connection is inbound.

> **Pipeline Filter & Advancement:** Choose whether you would like contacts to progress through any pipelines you may have associated with the campaign. In the dropdown menu in this field, choose the pipeline you would like contacts to be added to. A second dropdown will appear to choose the stage of that pipeline contacts will be added to at this point of the campaign. If you choose to set a pipeline stage to this element, an icon will appear on the bottom left corner of the element in your campaign to indicate that contacts will move through a pipeline stage at this point in your campaign.



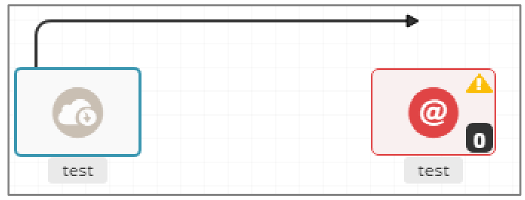


- If there is an issue with the element that needs to be resolved before the element can be activated, there will be a yellow or red exclamation point symbol in the top right corner of the element to signify this. If this is the case, when you select the element with your mouse, an additional section called Element Crosscheck will appear in the Settings Panel. The Element Crosscheck



section will describe the issue with the element and provide instructions on how to resolve it.

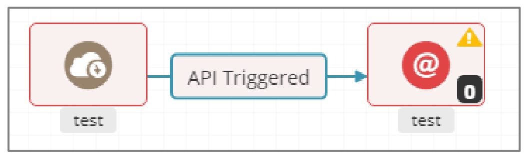
- To connect your Inbound API Connection element to another element in your campaign, click the black target icon located on the top corner of your element and drag it over to the element you wish to connect it to.



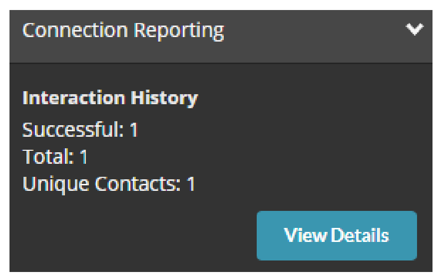
[**Note:** Some elements are not able to be connected to each other. For example, you cannot connect two Starting Point elements to each other, and you cannot connect a Starting Point element to the Contact Changed, Start from CRM, or Inbound API elements.]

- Click the green Create button to connect the two elements or the gray Close button to close the sidebar without connecting the two elements.

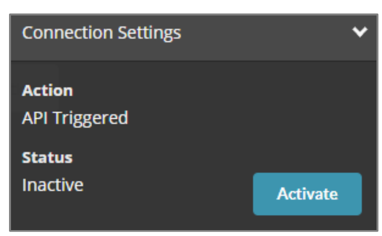
- Once a connection has been established between the Inbound API Connection element and at least one other element, a textbox with the connection type will appear on the line. Click on this textbox to open two new sections in the Settings Panel, Connection Reporting and Connection Settings.



- The Connection Reporting section contains the Interaction History. When you first create the connection, it will only show that there have been no interactions. Once the connection has triggered at least once, you will see more information. Interaction History will then show the number of Successful (and Unsuccessful, if any) triggers, the Total number of triggers, and the number of Unique Contacts who have triggered the trigger.



- The View Details button, when selected, will open the Connection History Sidebar, allowing you to see the history of all the interactions associated with the element. See the section on Interaction History for more information.
- The first Connection settings field is the Action field, which indicates the connection type (API Triggered).
- The second field is the Description field which will display a short description for when the connection will be triggered.
- The next field is the Status field where you can activate or deactivate the connection by clicking the blue or red button

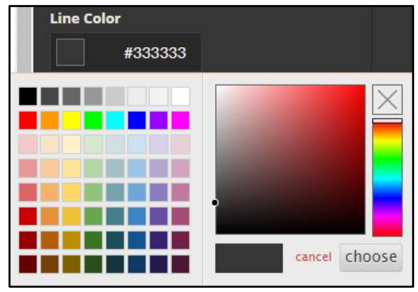


respectively. Activating a connection means that the connection will be able to be used as part of the campaign and should perform as expected.

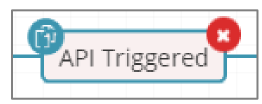
[**Note:** Keep in mind the connection will not become active until you save the campaign.]

- The last field is the Line Color field where you can choose the color for that connection's line.

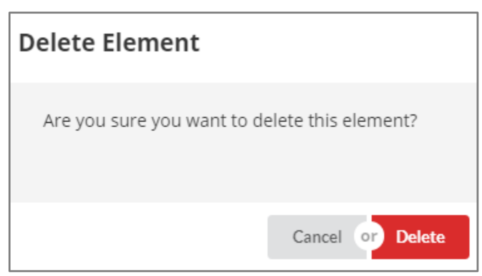
To choose a color:



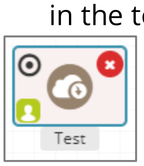
> Click on the color square in the field and a color selector will appear or enter the hex code of the color in the field next to the square.
> Choose your desired color from the pre-set swatches on the left side of the selector dropdown or use the right side to manually choose a color.
> Click the Choose 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.



- To copy a connection, hover your mouse over the textbox appearing on the connection to show a blue button at the top left of the textbox. Copying a connection saves you from having to re-configure the settings for any additional connections requiring the same conditions, saving time. Click and drag this button to create a new connection that can be attached to a new element. All connection settings configured in the initial connection will be copied over to the new connection.



- Delete a connection by hovering over the connection's textbox and clicking the red "X" button.
- To delete the element from the campaign, hover your mouse over the element and click the red "X" button in the top right corner that appears. A pop-up window will appear asking you to confirm the deletion. Click the red Delete button to complete the deletion or Cancel to close the window without deleting the element.



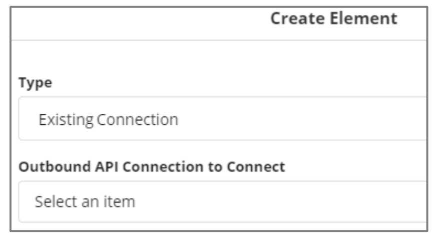
[**Note:** You will only receive the confirmation pop-up if the element has been activated or if the campaign has been saved.]

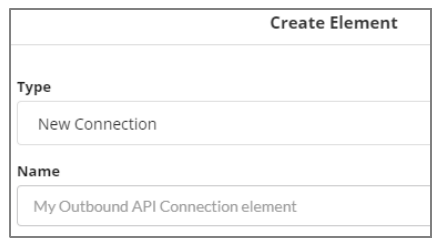
Outbound API Connection

The second drag-and-drop element in the Developers tab is the Outbound API Connection element. This element allows you to enable the SimplyCast system to send outbound data to an outside platform, such as contact information to a CRM external to SimplyCast.

To begin setting up this element:

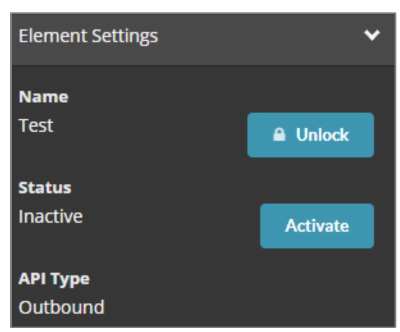
- Click and drag the Outbound API Connection element or double click to add it to the canvas.
- When you place the element, a pop-up window will appear with two fields. The first field will ask you to choose the API type you wish to create from the dropdown menu, either a new API connection or an existing connection. If you choose to use an existing outbound API connection, a new field will appear in the pop-up where you can choose one of your existing outbound API connections from the dropdown list available.





- If you choose to create a new API connection, the second field will ask you to enter a name for the new element. Type the name into the textbox provided.
- Click the green Create button to create the new element or click the gray Close button to close the sidebar without creating the new element.

- Once you have placed the element onto the canvas and have it selected with your mouse, four additional fields will appear in the Settings Panel on the right-hand side of your screen:



  > **Name:** This field contains the name you selected when you added the element to the canvas. By default, the name of the API connection will be locked. To unlock and change the name of the connection, click the blue Unlock button, then edit the name of the element in the textbox provided.

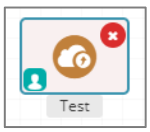
[**Note:** Keep in mind that changing the name of an API connection changes its name across the entire SimplyCast system, not just this campaign. For example, the same API connection can be used on multiple SimplyCast 360 canvases, therefore if it is renamed in one campaign, the new name will also appear in every other campaign it is found in.]

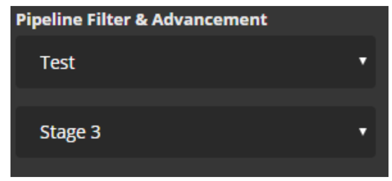
> **Status:** This field is where you can activate or deactivate the element by clicking the blue or red button respectively. Activating an element means that the element will be able to be used as part of the campaign and should perform as expected.

[**Note:** Keep in mind the element will not become active until you save the campaign.]

> **API Type:** This field states that the API connection is outbound.

> **Pipeline Filter & Advancement:** Choose whether you would like contacts to progress through any pipelines you may have associated with the campaign. In the dropdown menu in this field, choose the pipeline you would like contacts to be added to. A second dropdown will appear to choose the stage of that pipeline contacts will be added to at this point of the campaign. If you choose to set a pipeline stage to this element, an icon will appear on the bottom left corner of the element in your campaign to indicate that contacts will move through a pipeline stage at this point in your campaign.

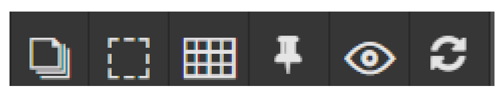




[**Note**: The Outbound API element cannot connect to other elements. It must always be the element that is connected with as it is meant to be an ending point of a campaign.]

- To delete the element from the campaign, hover your mouse over the element and click the red "x" button in the top right corner that appears.

Canvas Settings Bar and Widgets



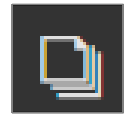
Above the canvas is the Canvas Settings Bar, containing eight widgets. Widgets are tools other than elements that you can use to help build your campaign and make it more user-friendly.

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

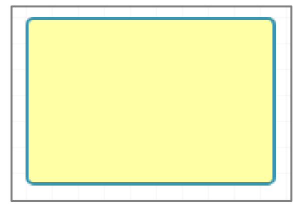
- Redo Next Action

Create a New Note on the Canvas

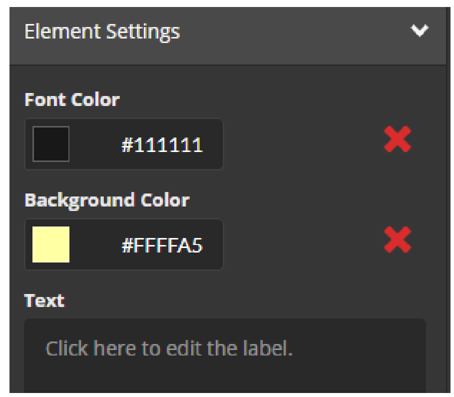


Especially for larger and more intricate campaigns, it helps to be able to add notes to the various stages of the campaign to maintain organization.

To add a note to your campaign:



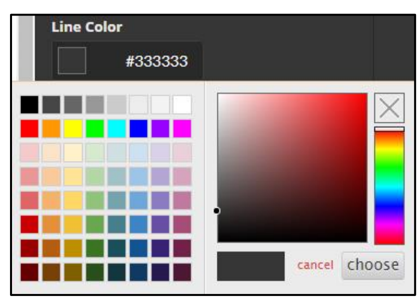
- Locate the "Create a New Note on the Canvas" icon in the toolbar above the canvas. This icon is the first icon to the left next to the search bar.



- Either click the "Create a New Note on the Canvas" icon or drag and drop it into the canvas to create a new note.
- Once you click or drag and drop the icon, a new note will appear on the canvas as a yellow textbox. You can move the note around on the canvas by dragging and dropping it with your mouse. When you have the note selected with your mouse, three additional fields will appear in the Element Settings section in the Settings Panel.
- The first field is the Font Color field, where you can choose the color of the text in that note.

  To choose a color:

  > 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.
  > Choose your desired color from the pre-set swatches on the left side of the selector dropdown or use the right side to manually choose a color.
  > 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 background color of the note.

  To choose a color:

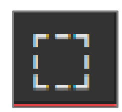
> Click on the color square in the field and a color selector will appear or enter the hex code of the color in the field next to the square.
> Choose your desired color from the pre-set swatches on the left side of the selector dropdown or use the right side to manually choose a color.
> Click the Choose 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 content of the note into the textbox provided.
- You can also adjust the size of the note.

To do this:

> Hover your mouse over the note and locate the arrows on the bottom and right sides of the note.
> To adjust the note's height, drag the downward-facing arrow up or down.
> 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.

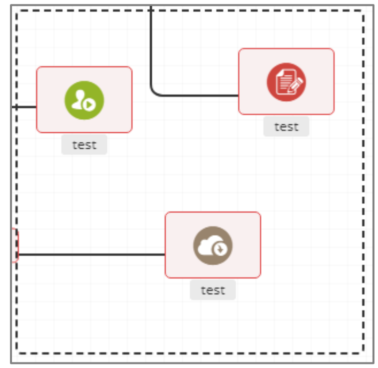


Create a New Section on the Canvas

For larger and more complex campaigns, it helps to have a way to keep them organized. You can use the sectioning tool to group specific elements into sections for easy management.

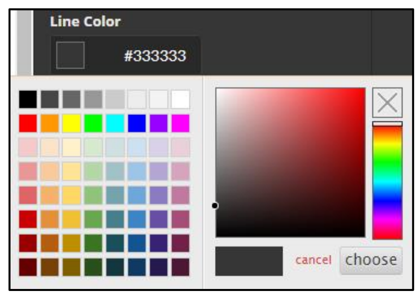
To create sections in your campaign:

- 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.



- 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.
- 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.
- The first field is the Border Color field, where you can change the color of the section’s border.

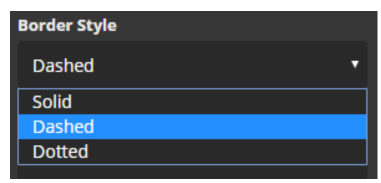
To choose a color:



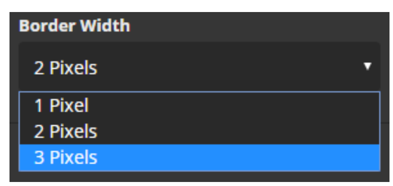
> Click on the color square in the field and a color selector will appear or enter the hex code of the color in the field next to the square.

> Choose your desired color from the pre-set swatches on the left side of the selector dropdown or use the right side to manually choose a color.

> 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.

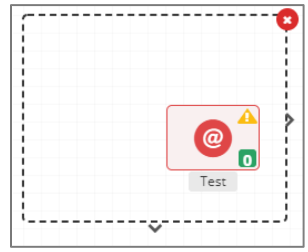


- The second field is the Border Style field. This is where you can choose whether the section’s border will consist of a solid line, dashed lines, or dotted lines. Choose your preferred border style from the dropdown menu provided.



- 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.

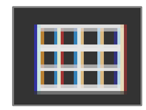
To do this:



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

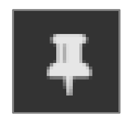
- To delete the section, hover your mouse over the note and click the red "x" icon in the top right corner of the section.

Show or Hide the Canvas Grid



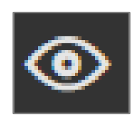
By default, the canvas is gridded. To hide the canvas grid, locate the Canvas Grid icon in the Widgets bar above the canvas. Click the Canvas Grid icon once to hide the Canvas Grid. If the canvas grid is hidden, click the Canvas Grid icon again to make the canvas grid re-appear.

Snap Elements to the Grid

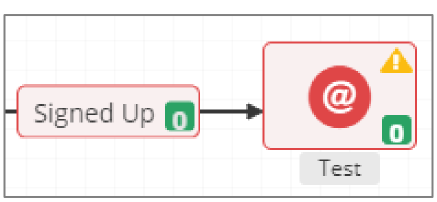


When moving elements around the canvas, you can choose for the elements to snap in line with the gridded lines or to be placed freely on the canvas. When the icon is dark, elements will snap to the grid. When it is lighter, elements will not snap to the grid. To change these settings, click the pushpin icon located 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 individual element has had appear on the canvas. To do this, click the eye icon in the Widgets bar above the canvas.



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.

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

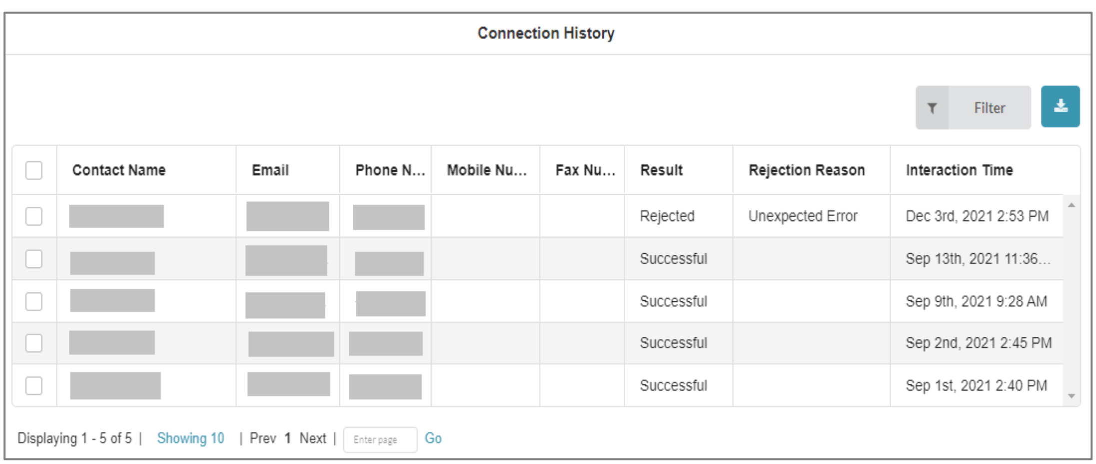
Clicking the interaction number on an element from the Campaigns tab, such as an Email Campaign element, you will be redirected to the Reports page for that campaign where you can see full report of the campaign so far. You can also click the interaction number on a Signup Form, Survey, or Update Form element to be referred to the respective form report. Refer to the *Reports* section in this guide for more information on reports.

If you click the number on an active connection, the Connection History sidebar will appear where you can see a full list of contacts and their interaction with that connection.

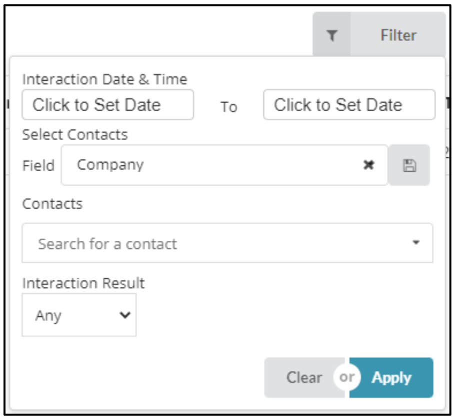
Connection History

By default, the Connection History sidebar contains a table with the following pieces of information:

- **Contact Name:** The name of the contact
- **Email:** The contact's email address
- **Phone Number:** The contact's phone number
- **Mobile Number:** The contact's mobile phone number
- **Fax Number:** The contact's fax number
- **Result:** Whether the contact passed through the connection successfully or was rejected
- **Rejection Reason:** The reason why a contact did not go through the connection (duplicate, error, etc.)
- **Interaction Time:** The date and time the contact interacted with that connection



- Selecting the gray Filter button will open up a menu where you can filter the interactions based on:

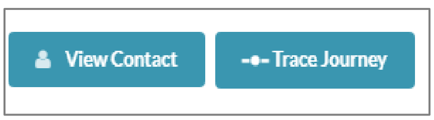


> **Interaction Date & Time:** Select the Date and Time selector menus to set up a date and time range to filter to.

> **Select Contacts:** Allows you to search for and select a specific field. Once a field is selected, an additional search bar will appear that will allow you to search the available options that you can search by.

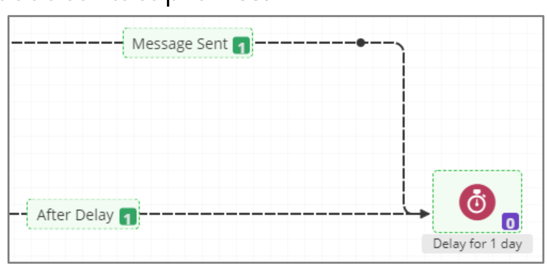
> **Interaction Result:** Allows you to filter to Any result, Successful results, or Rejected results.

- Once a filter's criteria is configured, you can either select the blue Apply button to save the filter and apply it, or click Clear to remove the filter.
- The blue download button will open the Download 360 Connection History panel, which will allow you to download a report of the Connection History. You can name the report, select from either Excel (.xlsx) or Text (.csv) for the file type, and use the Select Fields menu to add additional fields to the report (by selecting them from the searchable dropdown) or removing them (by selecting the gray "x" button next to the field. Once configured, you can either select the blue Download button to download the report or click Cancel to Cancel. Selecting Download will take you to the download page where you can download the report once it is ready.

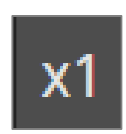


When you select a contact by clicking the checkbox beside their name, two blue buttons will appear at the top of the Connection History sidebar: View Contact and Trace Journey.

- **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.
- **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.

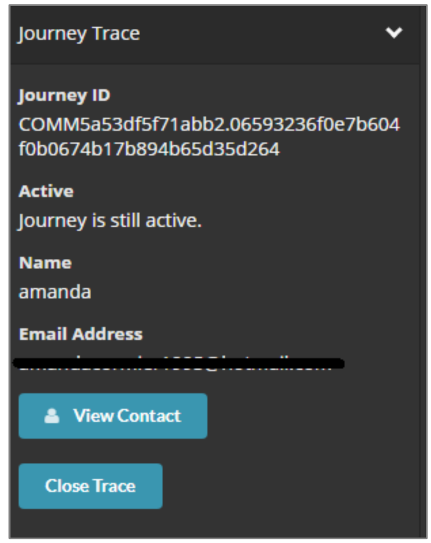


Furthermore, an animated dot will move along the line and through the elements to represent the journey. You can change the speed of the dot's movement from the navigation bar. To the right of the Refresh Interaction Information widget, you will see an



additional widget where you can adjust the journey trace's speed. Your speed options are x1 (normal speed), x2, and x5.

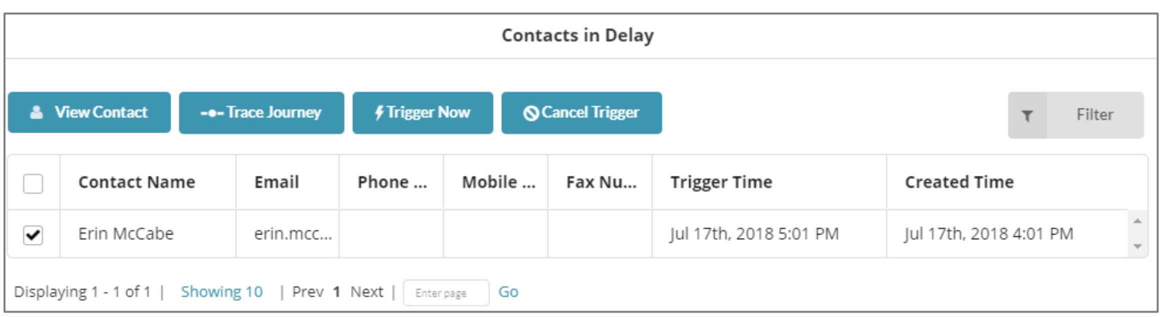
When the Journey Trace is activated, there will be a sidebar on the right side of the screen, with the following actions and pieces of information:



- **Journey ID:** The unique ID given to each journey
- **Active:** Indicates whether or not the journey is still active.
- **Name:** The contact's name
- **Email Address:** The contact's email address, if applicable to the journey
- **Phone Number:** The contact's phone number, if applicable to the journey
- **Mobile Number:** The contact's mobile number, if applicable to the journey
- **Fax Number:** The contact's fax number, if applicable to the journey
- **View Contact:** Click this button to view the contact's full CRM profile refer to the *SimplyCast CRM User Guide* for more information about contact profiles.
- **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.

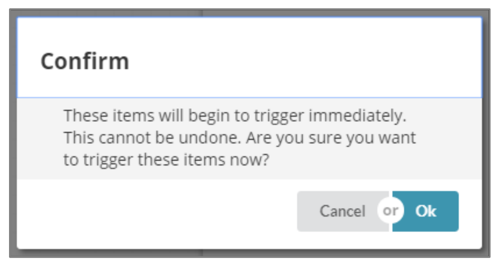


The table will contain the following information:

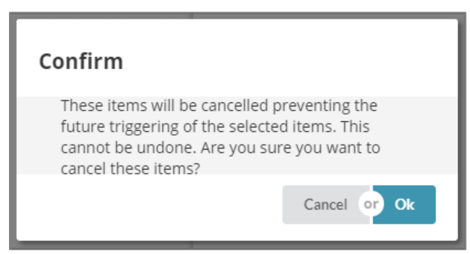
- **Contact Name:** The name (if available) of the contact in the delay
- **Email:** The email address (if available) of the contact in the delay
- **Phone Number:** The phone number (if available) of the contact in the delay
- **Mobile Number:** The mobile number (if available) of the contact in the delay
- **Fax Number:** The fax number (if available) of the contact in the delay
- **Trigger Time:** The date and time the contact will be triggered to progress to the next stage in the 360 campaign
- **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.

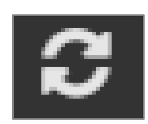
The other two buttons appearing when checking off one or more contacts in the table are the Trigger Now and Cancel Trigger buttons.



- 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. Clicking this button will cause a pop-up window to appear warning that once you override the delay for the contact(s) it cannot be undone. Click the blue OK button to continue or click Cancel to close the pop-up without overriding the delay.
- 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. Clicking the Cancel Trigger button will cause a pop-up window to appear indicating that this action cannot be undone. Click the blue OK button to continue or click Cancel to close the pop-up without cancelling the trigger.

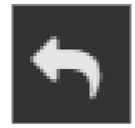


Refresh the Interaction Information



The final widget in the Widgets bar above the canvas is to refresh the interaction information displayed on the canvas. The widget will only be available if the Show Interactions on the Canvas widget is activated. Click the refresh icon at any time to refresh the canvas's interaction information.

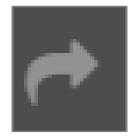
Undo Last Action



You are able to undo previous actions at any time while building a campaign by clicking the Undo button, located on the top right corner of the canvas opposite to the other widgets. Keep in mind once you save the campaign, you cannot undo actions performed prior to saving.

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

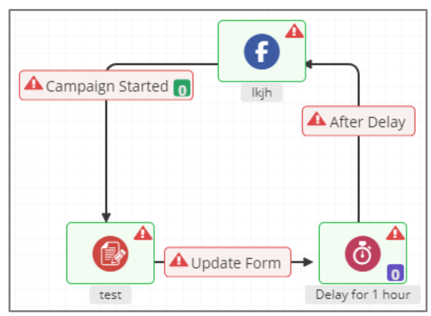
Redo Next Action



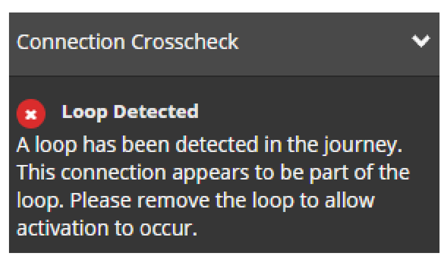
If you chose to undo an action, you are able to redo the action by clicking the Redo button beside the Undo button. Keep in mind once you save the campaign, you cannot redo actions that were undone prior to saving.

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

Loop Detection



The SimplyCast 360 application is very intuitive. It is able to detect 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 element or connection with one of these icons will cause the Element/Connection Crosscheck section to appear in the Settings Panel with an explanation 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.

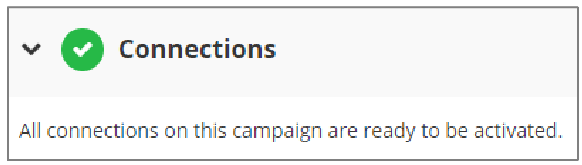
Crosscheck

The Crosscheck page helps you make sure that all items in the SimplyCast 360 campaign are activated before activation of the full campaign.

The Crosscheck page is divided into up to three sections:

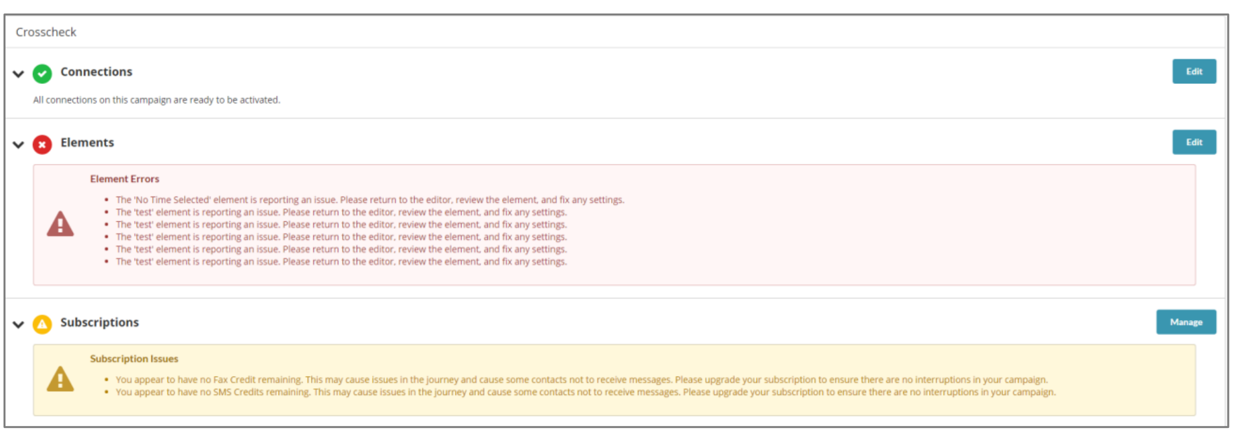
Connections

The Connections section informs you of any issues with connections between any 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 there are issues that could potentially cause problems in the campaign, but that do not need to be resolved in order to activate the campaign, there will be a yellow exclamation mark icon and a description of the issue(s) found. The system will offer instructions on how to resolve the issue, as well as a blue Edit button that will redirect you to the page where you can make the necessary changes to resolve the issue.

If there are issues that must be resolved in order to activate the campaign, there will be a red "X" icon and a description of the issue(s) found. The system will offer instructions on how to

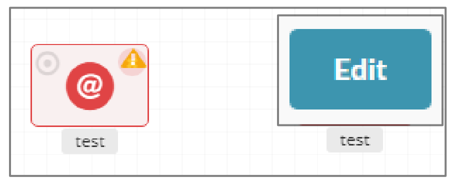


resolve the issue and the blue Edit button will redirect you to the appropriate page in the editor to make these changes.

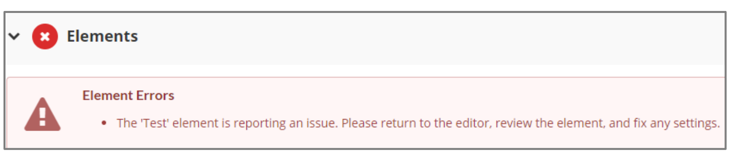
Elements

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 there are issues that could potentially cause problems in the campaign, but that do not need to be resolved in order 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 how to resolve the issue, as well as a blue Edit button that will redirect you to the page where you can make the necessary changes to resolve the issue.



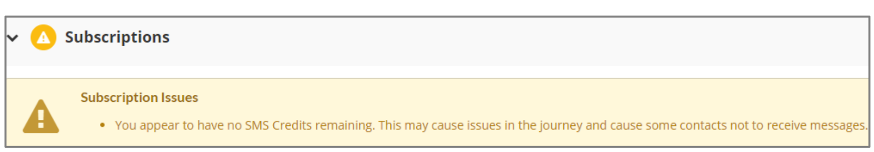
If there are issues that must be resolved in order to activate the campaign, you will see a red "X" icon and a description of the issue(s) found. The system will offer instructions on how to resolve the issue and a blue Edit button that will redirect you back to the canvas to make the appropriate changes. When you return to the canvas, any elements with errors will be red, while ones without errors will be green.



Subscriptions

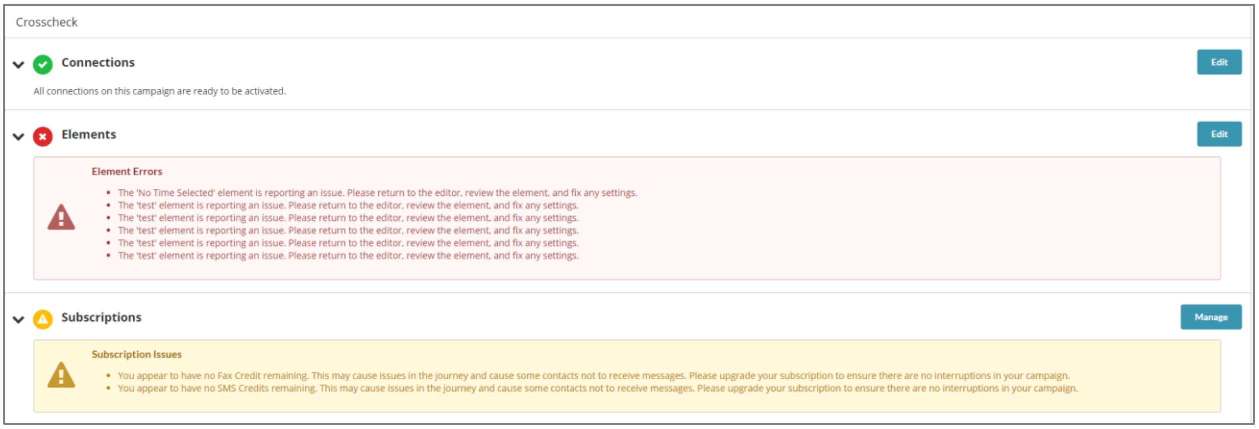
The Subscriptions section informs you of any issues with your account subscription, such as a lack of credits. If there are no issues, you will see a green checkmark icon and a message that all connections are ready to be activated.

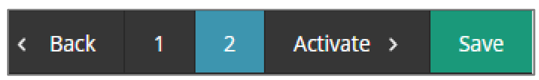
If there are issues that could potentially cause problems in the campaign, but that do not need to be resolved in order to activate the campaign, you will see a yellow exclamation mark icon and a description of the issue(s) found. The system will offer instructions on how to resolve the issue,



as well as a blue Manage button that will redirect you to your Account Subscription page, where you can make the appropriate changes to your subscription.

If there are issues that must be resolved in order 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 how to resolve 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 will be able to activate the campaign.





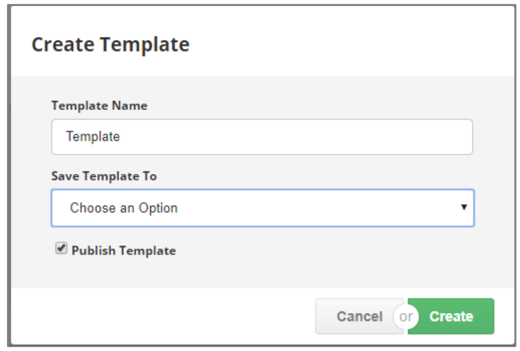
Once you have finished looking over the crosscheck page and all components of your campaign are ready to be activated, click the black Activate button on the bottom right corner of the screen to activate your campaign. You will be redirected to the SimplyCast 360 Dashboard where you will see the new SimplyCast 360 campaign has been activated.

Templates

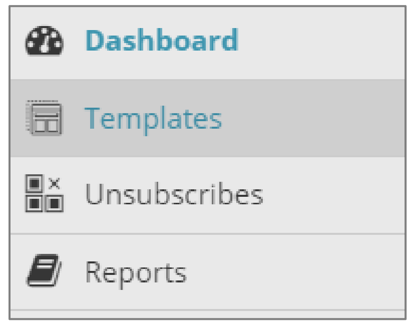
Templates are copies of existing SimplyCast 360 campaigns, with all the elements and connections intact. You can use templates as a base to create similar campaigns in the future without needing to build it from scratch.

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.

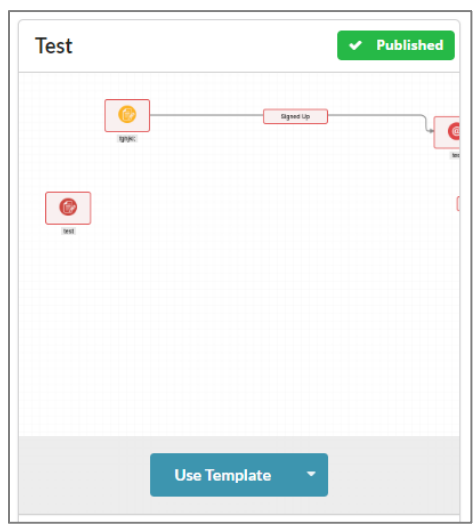


You are also able to enter the Template Management section from the main SimplyCast 360 Dashboard by clicking the Templates option from the menu on the left side of the screen. Clicking on this tab will bring you to a page where you are able to view, edit, copy, publish, unpublish, and delete SimplyCast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

In the Templates section, you are able to:

View a List of Templates



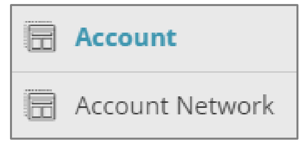
When you have created at least one template in your account (or have had at least one template shared by another member of your account network), you will be able to view these templates on this page.

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)

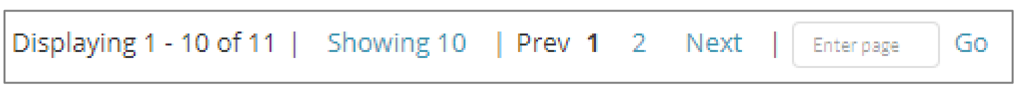
In the menu on the left side of the screen you will see two template visibility options: Account and Account Network. The Account option refers to any templates that you have made yourself or other users in your specific SimplyCast account have published. The Account Network option lets you view the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

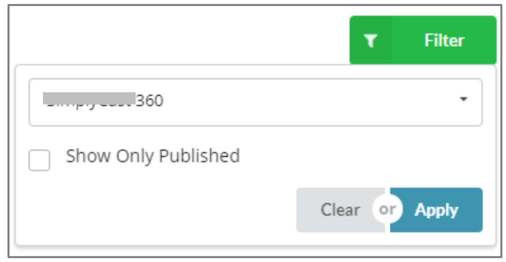


Filter Templates

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.]

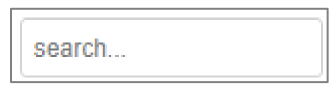
To use the filter tool:



- Locate and click the green Filter button at the top right of the Account Templates page.
- 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.
- You can also choose to show only campaign templates that have been published. To do this, check off the Show Only Published checkbox.
- 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

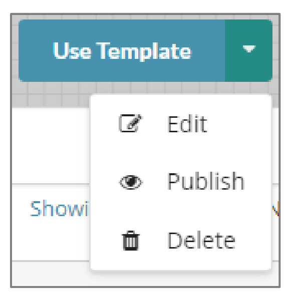


If you are looking for a particular template, you can search through the templates in the list.

To do this:

- Select the search box that appears in the top right-hand corner of the page.
- Type in the name of the template you would like the system to search for.
- 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

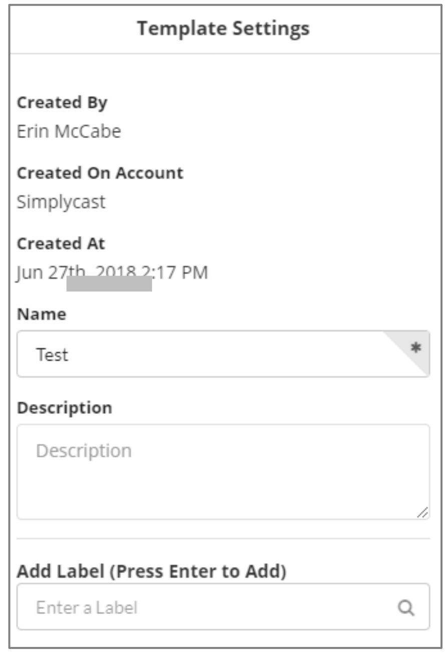


You can edit the name and description of a template as well as add labels.

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.

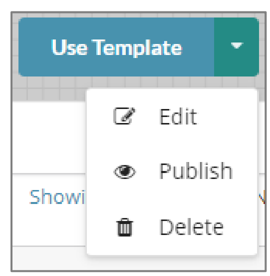


- Click the blue Save button at the bottom of the sidebar to close the sidebar and save your edits or click Cancel to close the sidebar without saving your edits.

Publish or Unpublish Templates

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

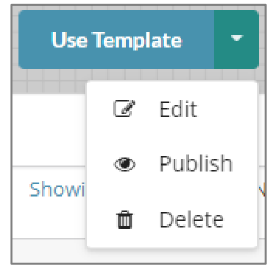
To publish or unpublish a template from the Account Templates page:



- Locate the blue Use Template button located at the bottom of the preview for the appropriate template.
- Click the downward-facing arrow to the right of the Use Template button to open a dropdown menu.
- Click the Publish/Unpublish button in this dropdown.
  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.

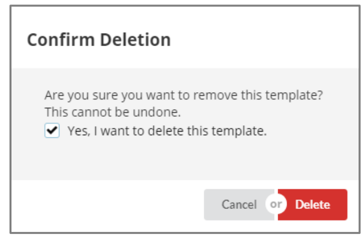
[**Note:** You can still make new edits to published templates.]

Delete Templates



To delete a template:

- Locate the blue Use Template button located at the bottom of the preview for the appropriate template.
- Click the downward-facing arrow to the right of the Use Template button to open a dropdown menu.
- Click the Delete button in this dropdown.
- 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.

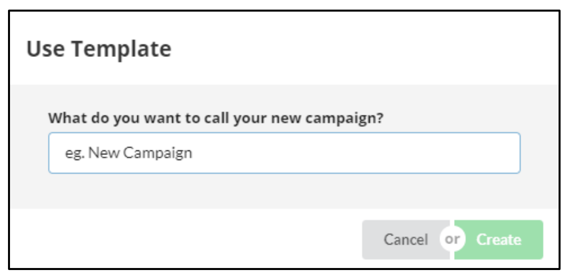


Create a SimplyCast 360 Campaign Using a Template

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

In the Templates section of SimplyCast 360:

- 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.

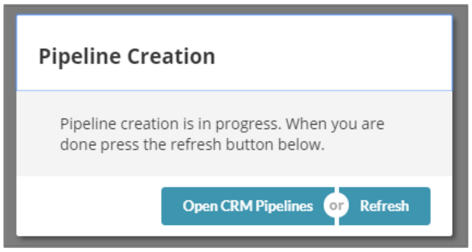


[**Note:** The Templates section is not where you can view and use pre-created templates that have been pushed from SimplyCast. Pre-created templates known as Common Templates can be viewed by selecting the arrow button next to the green Create Campaign button. Refer to the next creation method for more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

- 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.
- 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.

- 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.
- Repeat for any other item you need to map.
- 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).

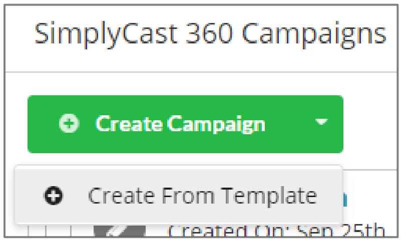


This will cause a pop-up to appear asking you click the blue Open "X" button to open a new window in your browser where you can create or add the new resource as required without losing your progress in the Template setup.
- Once you have created your new resource in the new browser window, go back to 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.]

- Click the green Create Campaign button to continue or click Cancel to stop the process.
- 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.

From the main SimplyCast 360 Dashboard:



- Click the arrow button next to the green Create Campaign button to produce a dropdown menu with the Create From Template option.
- 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.]

- 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).
- Search through the available templates using the search bar where you can search by template title, or by any tags added to the templates.

- To use a template, click the blue Use Template button appearing under the template you wish to use.

- From here, the campaign creation is the same as it is in the section above (naming, mapping resources, etc.).

Unsubscribes

The third tab in the left-hand menu in the SimplyCast 360 dashboard is the Unsubscribes tab. This is where you are able to view the unsubscribe lists for each of the four primary communication channels in the SimplyCast platform: email, SMS, voice, and fax.

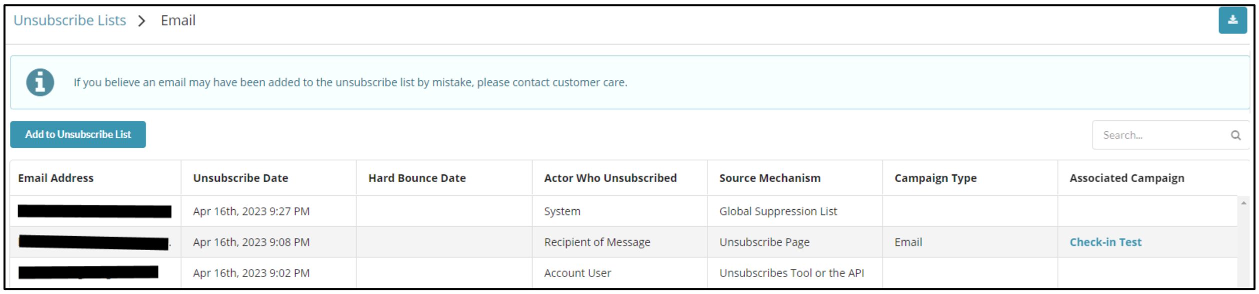
On this page, you will see the four channels with unsubscribe lists available. Underneath the name of each channel you can see the total number of unsubscribes for that channel. To view the suppression list for a particular channel, click the blue View List button located to the far right of the respective channel name.

Email

Selecting the View List button next to Email on the Unsubscribes page will bring you to the Email Unsubscribe List. Here you can view and download the unsubscribe list as well as manually add email addresses to this list.

[**Note:** You may not contact anyone in the unsubscribe list per SimplyCast's Terms and Conditions.]

In the Unsubscribe List, there are seven fields:



- **Email Address:** The email address added to the unsubscribe list
- **Date Added:** The date the email address was added to the unsubscribe list
- **Hard Bounce Date:** The date the email address hard bounced, if applicable.
- **Actor Who Unsubscribed:** The individual who unsubscribed the contact (generally, either the contact themselves or an account user)
- **Source Mechanism:** The source mechanism of the unsubscribe (e.g. a link in an email or the Unsubscribes tool).
- **Campaign Type:** The type of campaign that the source mechanism was associated with.
- **Associated Campaign:** The specific campaign that the source mechanism was associated with.

To view an email address that does not appear on the first page of the unsubscribe list, navigate to the bottom of your screen where you will find the page numbers. Proceed to another page of email addresses by clicking the page number you would like to visit. The Next button will take you to the next page of email addresses or enter the page number in the textbox provided and click Go. Choose how many email addresses to display at once by clicking on the "Showing..." link located to the right of the number of displayed email addresses.

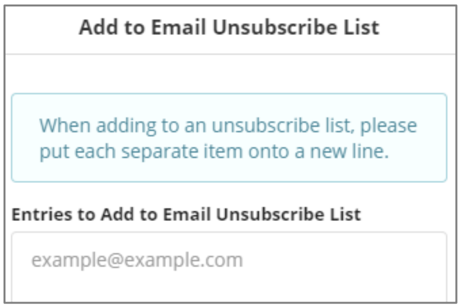
To find a particular email address, use the search bar located at the top right of the screen above the unsubscribe list. As you type in the name of the email address, the results will automatically filter.

To manually add contacts to the email unsubscribe list:

- Click the blue Add to Unsubscribe List button above the email unsubscribe list.

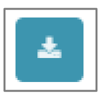
- In the sidebar on the right side of the screen, type each email address that you would like to manually unsubscribe in the textbox provided. Each new email address must be entered on a new line.

- Once you have entered all the email addresses to unsubscribe, click the blue Add to List button located below the textbox. Or, click Cancel to close the sidebar without adding any contacts to the unsubscribe list.



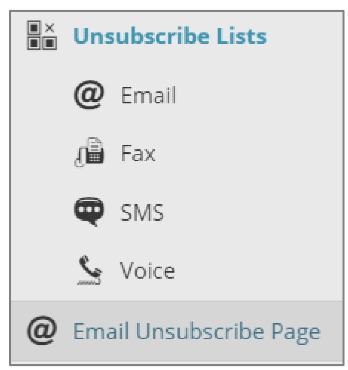
[**Note:** Once an email address is added to the unsubscribe list, it cannot be removed. The contact can re-subscribe to your sending list through a signup form or another method but cannot be removed from the unsubscribe list manually. This is a security feature added to ensure unsubscribed contacts won't receive messages if they don't wish to.]

To download the unsubscribe list, click the blue download button located at the top right of the page. You can choose to download the list as a CSV or XLSX file.



You will then be redirected to the Downloads page, where you must click on the list you wish to download and click the blue Download Report button that will become active. The list will be downloaded to the Downloads folder of your device.

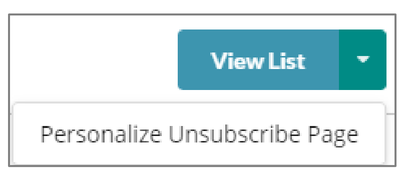
Personalize Email Unsubscribe Page

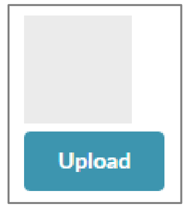


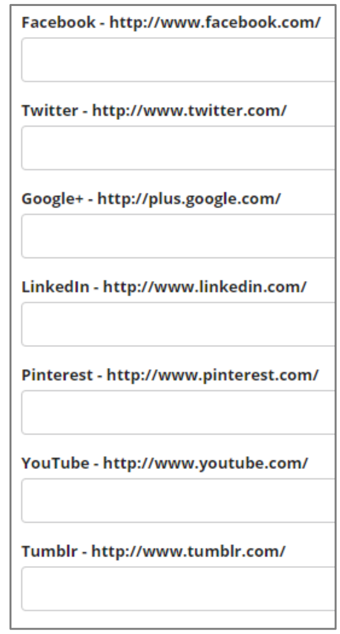
You can personalize what users see when they enter the email unsubscribe page while unsubscribing to your email messages.

To do this:

- Enter the Email Unsubscribe setup page by clicking the Email Unsubscribe Page option in the left-hand menu in the main Unsubscribes page. Or enter the page by clicking the blue arrow button next to the blue View List button across from the Email channel and selecting the Personalize Unsubscribe Page option.
- Once in the Email Unsubscribe Page setup screen you are able to configure how the page will look. There are two items you can configure:







> **Logo:** You can add a logo to the Email Unsubscribe Page by clicking the blue Upload button beneath the logo square and selecting a previously-uploaded file from the Image Selector or uploading a new file from your device. Click Select at the bottom of the Image Selector to choose the image or the “X” button at the top to close the selector without selecting an image.

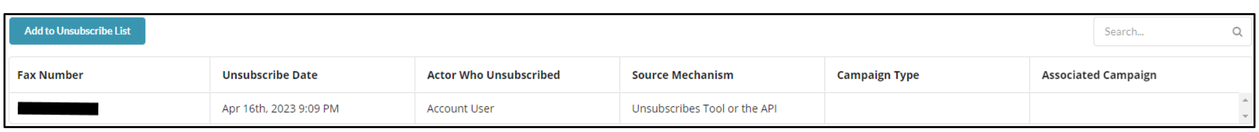
> **Social Media:** You can add the links to your social media sites on the Email Unsubscribe Page so users can still follow you on these sites even if they choose to unsubscribe from your email communications. Enter the URLs for your desired social media sites in their respective fields. You can add links to your Facebook, Twitter, Google+, LinkedIn, Pinterest, YouTube, and/or Tumblr pages.

- Once you have configured your Email Unsubscribe Page, you must save your actions using one of the two buttons at the bottom of the setup page. Clicking the blue Save button will save your settings, and the blue Save & Preview button will save your settings and show you a preview of what your Email Unsubscribe Page will look like to users.

- To close the Preview window, click the “X” button in the top right corner.

Fax

Selecting the blue View List button next to Fax on the Unsubscribes page will direct you to the Fax Unsubscribe List. Here you can view and download the unsubscribe list as well as manually add fax numbers to this list.



Fax Number	Unsubscribe Date	Actor Who Unsubscribed	Source Mechanism	Campaign Type	Associated Campaign
[redacted]	Apr 16th, 2023 9:09 PM	Account User	Unsubscribes Tool or the API		

[**Note:** You may not contact anyone in the unsubscribe list per SimplyCast’s Terms and Conditions.]

In the Unsubscribe List, there are six fields:

- **Fax Number:** The fax number added to the unsubscribe list.
- **Unsubscribe Date:** The date and time the fax number was added to the unsubscribe list.

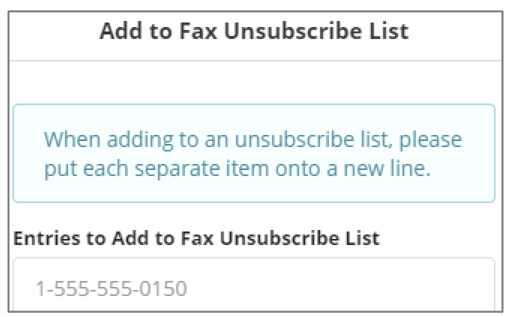
- **Actor Who Unsubscribed:** The individual who unsubscribed the contact (generally, either the contact themselves or an account user)
- **Source Mechanism:** The source mechanism of the unsubscribe.
- **Campaign Type:** The type of campaign that the source mechanism was associated with.
- **Associated Campaign:** The specific campaign that the source mechanism was associated with.

To view a fax number that does not appear on the first page of the unsubscribe list, navigate to the bottom of your screen where you will find the page numbers. Proceed to another page of fax numbers by clicking the page number you would like to visit. The Next button will take you to the next page of fax numbers or enter the page number in the textbox provided and click Go. Choose how many numbers to display at once by clicking on the "Showing..." link located to the right of the number of displayed fax numbers.

To find a particular fax number, use the search bar located at the top right of the screen above the unsubscribe list. As you type in the name of the number, the results will automatically filter.

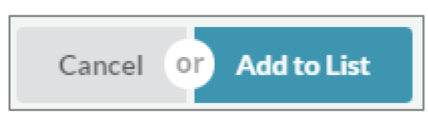
To manually add contacts to the fax unsubscribe list:

- Click the blue Add to Unsubscribe List button above the fax unsubscribe list.
- In the sidebar on the right side of the screen, type each fax number that you would like to manually unsubscribe in the textbox provided. Each new number must be entered on a new line.

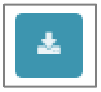


Once you have entered all the numbers to unsubscribe, click the blue Add to List button located below the textbox. Or, click Cancel to close the sidebar without adding any contacts to the unsubscribe list.

[**Note:** Once a fax number is added to the unsubscribe list, it cannot be removed. The contact can re-subscribe to your sending list through a signup form or another method but cannot be removed from the unsubscribe list manually. This is a security feature added to ensure unsubscribed contacts won't receive messages if they don't wish to.]

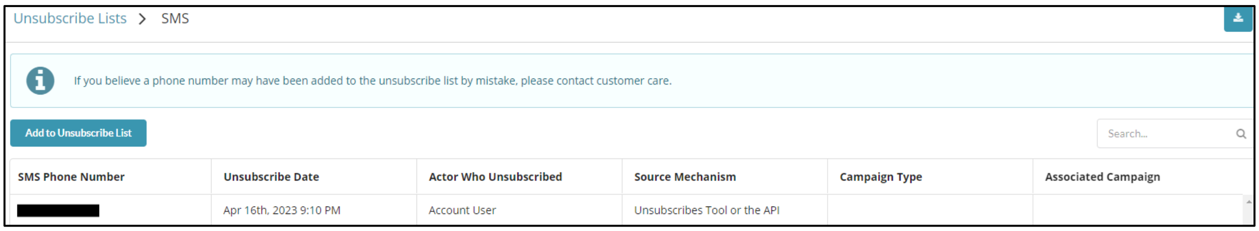


To download the unsubscribe list, click the blue download button located at the top right of the page. You can choose to download the list as a CSV or XLSX file. You will then be redirected to



the Downloads page, where you must click on the list you wish to download and click the blue Download Report button that will become active. The list will be downloaded to the Downloads folder of your device.

SMS

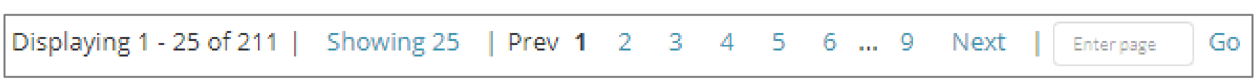


Selecting the blue View List button next to SMS on the Unsubscribes page will direct you to the SMS Unsubscribe List. Here you can view and download the unsubscribe list as well as manually add SMS numbers to this list.

[**Note:** You may not contact anyone in the unsubscribe list per SimplyCast's Terms and Conditions.]

In the Unsubscribe List, there are two fields:

- **SMS Phone Number:** The SMS number added to the unsubscribe list.
- **Unsubscribe Date:** The date and time the SMS Phone number was added to the unsubscribe list.
- **Actor Who Unsubscribed:** The individual who unsubscribed the contact (generally, either the contact themselves or an account user)
- **Source Mechanism:** The source mechanism of the unsubscribe.
- **Campaign Type:** The type of campaign that the source mechanism was associated with.
- **Associated Campaign:** The specific campaign that the source mechanism was associated with.
-



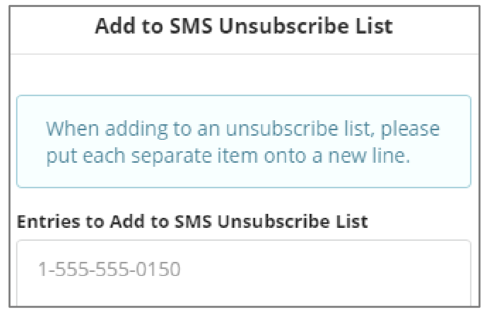
To view an SMS number that does not appear on the first page of the unsubscribe list, navigate to the bottom of your screen where you will find the page numbers. Proceed to another page of SMS numbers by clicking the page number you would like to visit. The Next button will take you to the next page of SMS numbers or enter the page number in the textbox provided and click

Go. Choose how many numbers to display at once by clicking on the “Showing...” link located to the right of the number of displayed SMS numbers.

To find a particular SMS number, use the search bar located at the top right of the screen above the unsubscribe list. As you type in the name of the number, the results will automatically filter.

To manually add contacts to the SMS unsubscribe list:

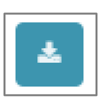
- Click the blue Add to Unsubscribe List button above the SMS unsubscribe list.
- In the sidebar on the right side of the screen, type each SMS number that you would like to manually unsubscribe in the textbox provided. Each new number must be entered on a new line.



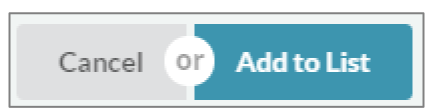
Once you have entered all the numbers to unsubscribe, click the blue Add to List button located below the textbox. Or, click Cancel to close the sidebar without adding any contacts to the unsubscribe list.

[**Note:** Once an SMS number is added to the unsubscribe list, it cannot be removed. The contact can re-subscribe to your sending list through a signup form or another method but cannot be removed from the unsubscribe list manually. This is a security feature added to ensure unsubscribed contacts won’t receive messages if they don’t wish to.]

To download the unsubscribe list, click the blue download button located at the top right of the page. You can choose to download the list as a CSV or XLSX file. You will then be redirected to

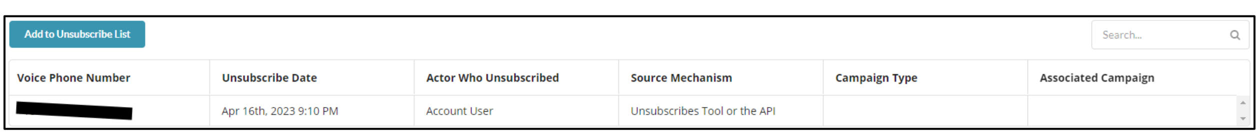


the Downloads page, where you must click on the list you wish to download and click the blue Download Report button that will become active.



The list will be downloaded to the Downloads folder of your device.

Voice



Voice Phone Number	Unsubscribe Date	Actor Who Unsubscribed	Source Mechanism	Campaign Type	Associated Campaign
[redacted]	Apr 16th, 2023 9:10 PM	Account User	Unsubscribes Tool or the API		

Selecting the blue View List button next to Voice on the Unsubscribes page will direct you to the Voice Unsubscribe List. Here you can view and download the unsubscribe list as well as manually add phone numbers to this list.

[**Note:** You may not contact anyone in the unsubscribe list per SimplyCast's Terms and Conditions.]

In the Unsubscribe List, there are two fields:

- **Voice Phone Number:** The phone number added to the unsubscribe list.
- **Unsubscribe Date:** The date and time the voice phone number was added to the unsubscribe list.
- **Actor Who Unsubscribed:** The individual who unsubscribed the contact (generally, either the contact themselves or an account user)
- **Source Mechanism:** The source mechanism of the unsubscribe.
- **Campaign Type:** The type of campaign that the source mechanism was associated with.
- **Associated Campaign:** The specific campaign that the source mechanism was associated with.

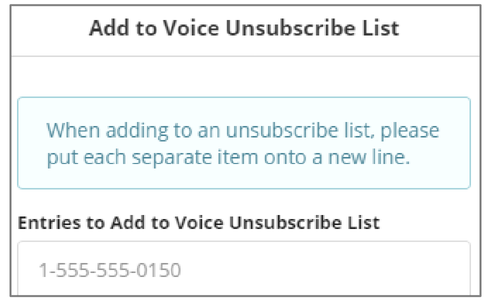
To view a phone number that does not appear on the first page of the unsubscribe list, navigate to the bottom of your screen where you will find the page numbers. Proceed to another page of phone numbers by clicking the page number you would like to visit. The Next button will take you to the next page of phone numbers or enter the page number in the textbox provided and click Go. Choose how many numbers to display at once by clicking on the "Showing…" link located to the right of the number of displayed phone numbers.

To find a particular phone number, use the search bar located at the top right of the screen above the unsubscribe list. As you type in the name of the number, the results will automatically filter.

To manually add contacts to the Voice unsubscribe list:

- Click the blue Add to Unsubscribe List button above the Voice unsubscribe list.

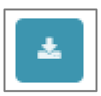
- In the sidebar on the right side of the screen, type each phone number that you would like to manually unsubscribe in the textbox provided. Each new number must be entered on a new line.



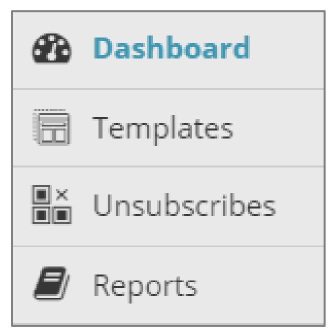
Once you have entered all the numbers to unsubscribe, click the blue Add to List button located below the textbox. Or, click Cancel to close the sidebar without adding any contacts to the unsubscribe list.

[**Note:** Once a phone number is added to the unsubscribe list, it cannot be removed. The contact can re-subscribe to your sending list through a signup form or another method but cannot be removed from the unsubscribe list manually. This is a security feature added to ensure unsubscribed contacts won't receive messages if they don't wish to.]

To download the unsubscribe list, click the blue download button located at the top right of the page. You can choose to download the list as a CSV or XLSX file. You will then be redirected to the Downloads page, where you must click on the list you wish to download and click the blue Download Report button that will become active. The list will be downloaded to the Downloads folder of your device.



Reports



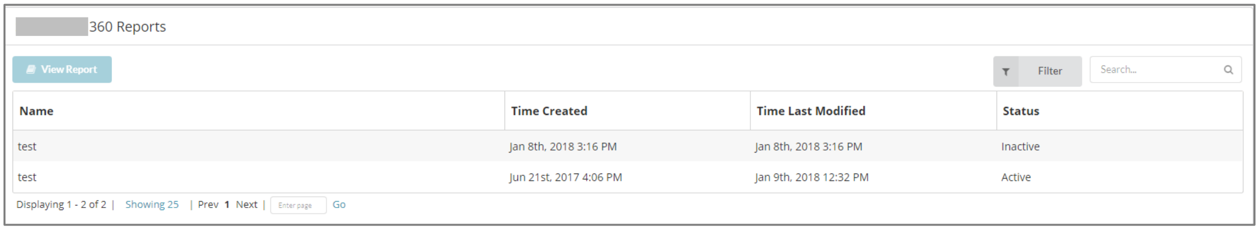
To view a report for any of your SimplyCast 360 campaigns, you must navigate to the SimplyCast Reporting interface.

To do this:

- Go to the main SimplyCast 360 Dashboard.
- Click the Reports option from the menu on the left side of your screen.
- You will be directed to the SimplyCast 360 Reporting Dashboard.

Once in the SimplyCast 360 Reporting Dashboard, you are able to:

View the List of Reports



When you enter the 360 Reports Dashboard, you should immediately see a list of all the SimplyCast 360 campaigns you have created with the most recent campaign being at the top of the list. If there are no campaigns in the list, you have not yet created any**.**

Each report in the list is broken down into four columns:

- **Name**: The name you gave to the SimplyCast 360 campaign when you created it
- **Time Created:** The date and time the SimplyCast 360 campaign was created
- **Time Last Modified:** The date and time the SimplyCast 360 campaign was last edited
- **Status:** Whether the SimplyCast 360 campaign is currently active or inactive

Navigate Multiple Pages of Reports

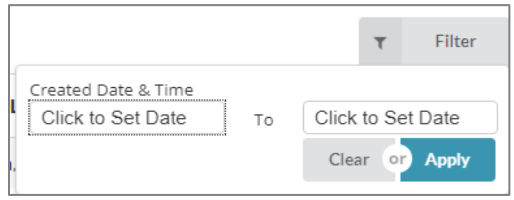
If you have created enough SimplyCast 360 campaigns, they will be displayed on multiple pages in the Reports Dashboard.

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

- Navigate down to the bottom of your screen, where you will find the page numbers indicating the total number of pages of SimplyCast 360 campaigns you have created.
- Proceed to another page of reports by clicking either the page number you would like to visit, or the Next button which will take you to the next page.
- If you know the page number you would like to go to, enter the page number in the provided field and select Go.
- You can also choose how many SimplyCast 360 campaigns to display at a time by clicking on the “Showing…” link located to the right of the number of displayed campaign reports.

Filter Reports

You have the ability to filter your SimplyCast 360 reports to show reports from a particular date, at a particular time, or within a certain window of time.



To filter your reports:

- Find the gray Filter button located at the top right-hand side of your screen in the SimplyCast 360 Reporting Dashboard, beside the search bar.
- Click the Filter button and a dropdown menu will appear with two boxes that say Click to Set Date. This is where you can indicate the range of dates and times from which to gather reports.
- Click either box and another dropdown menu will show up with two fields labeled Date and Time where you can manually insert the date and time to filter SimplyCast 360 reports from.
- Below these fields is a calendar you can also use to choose the date and time to use to filter reports.
- Click the blue Apply button to implement the filter. Or, click Clear if you do not wish to filter your reports, which will close the dropdown menu

[**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.]

Search/Sort Reports

To find a particular SimplyCast 360 report, use the search bar located at the top right of the screen above the list of all the reports in the main SimplyCast 360 Reporting page. The results will automatically be filtered to show the matches to the typed-in text.

You can also sort your reports by any of the four information columns in the table by clicking on the column name in the Reports Dashboard. Once clicked, your list of reports will re-order automatically. Sorting by the Name column will sort the reports alphabetically or reverse alphabetically, while clicking Time Created or Time Last Modified will sort the reports in chronological or reverse chronological order.

View Reports

To view the report of a particular SimplyCast 360 campaign:

- Select the campaign you would like to see the report for by clicking on the row in the table for that particular campaign.
- The blue View Report button on top of the SimplyCast 360 campaign list will become active and able to be clicked on once you have chosen a campaign.
- Click View Report and you will be directed to the report for that particular campaign. If you click View Report for a campaign with no data to report (e.g. a campaign that has not been activated yet), you will not see the report and will see a message explaining this.

In the report for your chosen SimplyCast 360 campaign, you will see up to five sections:

Email Classic Sends


Email Classic Sends

View Report

Search...

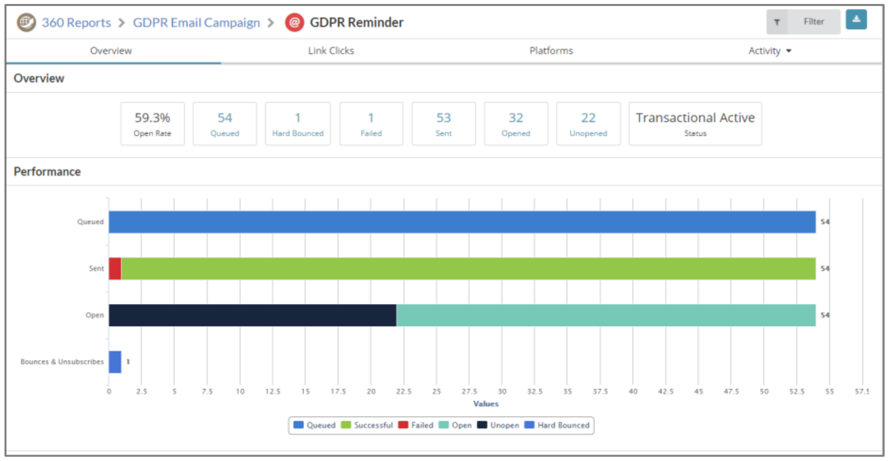
Project Name	Status	Subject	Sent	Failed	Clickers	Opens	Unsubscribes
Test	Transactional Active	Test	0	0	0	0	0

If you have included any Email Classic elements in your SimplyCast 360 campaign, you will see all of them in the Email Classic Sends table.

This table contains up to eight columns of information:

- **Project Name:** The name of the email campaign given to it when it was created as part of the campaign.
- **Status:** The current status of the email, whether active or not.
- **Subject:** The subject line provided to the email when it was set up in the Email Editor.
- **Sent:** The total number of emails sent successfully.
- **Failed:** The number of emails that failed to send as part of the email campaign.
- **Clickers:** The total number of link clicks by contacts the email received.
- **Opens:** The number of opens received from the email recipients.
- **Unsubscribes:** The total number of email recipients who unsubscribed from receiving further communications from you after receiving the particular email.

Click on the checkbox located to the left of any email campaign in the list that appears in the Email Classic Sends table and then click the blue View Report button at the top of the section to enter the full report for that specific email campaign.



Search for a specific email campaign by using the search bar at the top right corner of the Email Classic Sends table. Type in your search query and the table will filter results to match the typed-in text. You can also select multiple emails to combine or compare reports.

Refer to the *SimplyCast Email User Guide* for more information on email reporting.

Email Sends

Email Sends

View Report

Search...

	Name	Status	Subject	Sent	Failed	Clickers	Opens	Unsubscribes
	Email	Prepared	Test	0	0	0	0	0
	Email 2	Prepared	Test 2	0	0	0	0	0

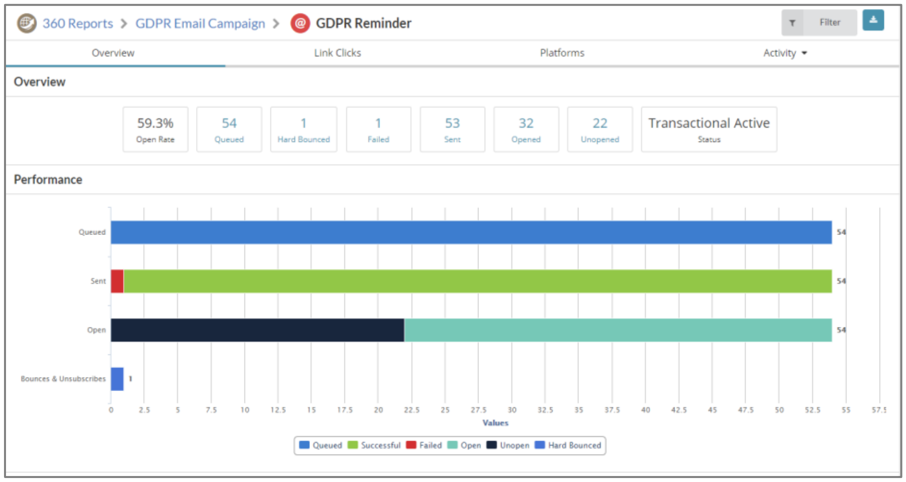
If you have included any email elements in your SimplyCast 360 campaign, you will see all of them in the Email Sends table.

This table contains eight columns of information:

- **Name:** The name of the email campaign given to it when it was created as part of the campaign.
- **Status:** The current status of the email, whether active or not.
- **Subject:** The subject line provided to the email when it was set up in the Email Editor.
- **Sent:** The total number of emails sent successfully.
- **Failed:** The number of emails that failed to send as part of the email campaign.
- **Clickers:** The total number of link clicks by contacts the email received.
- **Opens:** The number of opens received from the email recipients.

- **Unsubscribes:** The total number of email recipients who unsubscribed from receiving further communications from you after receiving the particular email.

Click on the checkbox located to the left of any email campaign in the list that appears in the Email Sends table and then click the blue View Report button at the top of the section to enter the full report for that specific email campaign.



Search for a specific email campaign by using the search bar at the top right corner of the Email Sends table. Type in your search query and the table will filter results to match the typed-in text. You can also select multiple emails to combine or compare reports.

Refer to the *SimplyCast Email User Guide* for more information on email reporting.

Fax Sends

Fax Sends

View Report

Search...

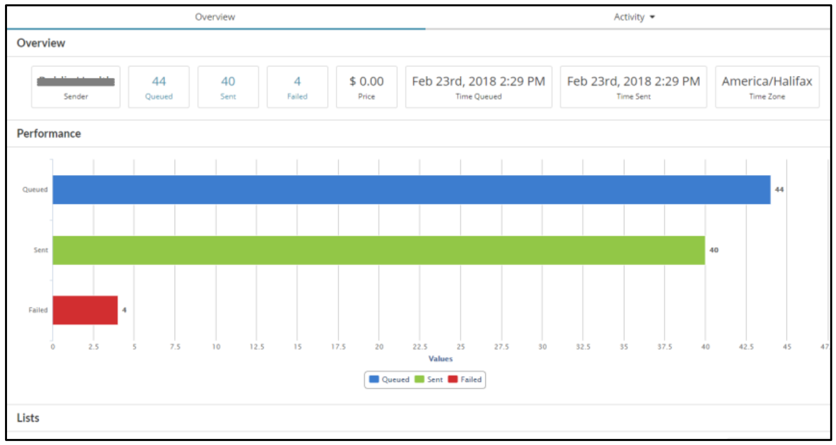
	Name	Status	Sender Name	Queued	Sent	Failed	Price
	Draft	Draft	sdg	0	0	0	N/A

If you have included any fax elements in your SimplyCast 360 campaign, you will see them in a list appearing in the Fax Sends table.

This table contains up to seven columns of information:

- **Name:** The name of the fax campaign given to it when it was created as part of the SimplyCast 360 campaign.
- **Status:** The current status of the fax campaign, whether active or not.
- **Sender Name:** The name of the account user used to send the fax campaign.
- **Queued:** The total number of contacts the system tried to send the fax to.
- **Sent:** The total number of faxes sent successfully.

- **Failed:** The number of faxes that failed to send as part of the fax campaign.
- **Price:** The total cost (if any) incurred by sending the fax to contacts.

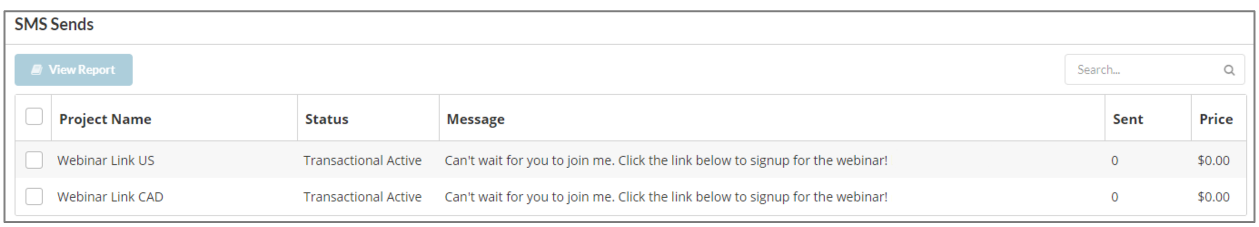


Click on the checkbox located to the left of any fax campaign in the Fax Sends table and then click the blue View Report button at the top of the section to enter the full report for that specific fax campaign.

Search for a specific fax campaign by using the search bar at the top right corner of the Fax Sends table. Type in your search query and the table will filter results to match the typed-in text. You can also select multiple fax messages to combine or compare reports.

Refer to the *SimplyCast Fax User Guide* for more information on fax reporting.

SMS Sends

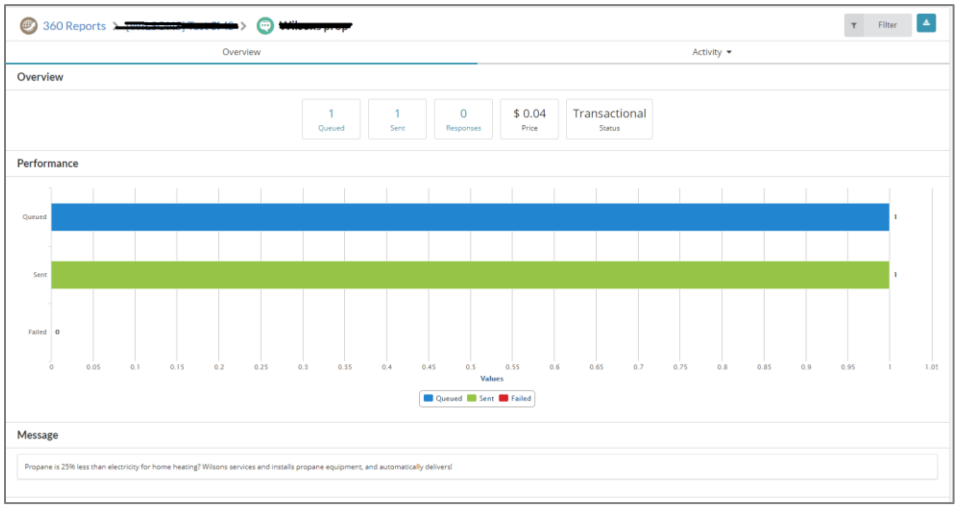


If you have included any SMS elements in your SimplyCast 360 campaign, you will see them in a list appearing in the SMS Sends table.

This table contains up to five columns of information:

- **Campaign Name:** The name of the SMS campaign given to it when it was created as part of the SimplyCast 360 campaign.
- **Status:** The current status of the SMS message, whether active or not.
- **Message**: The text of the SMS message configured in the SMS editor.
- **Sent:** The total number of SMS messages sent successfully.
- **Price:** The total cost (if any) incurred by sending the SMS messages to contacts.

Click on the checkbox located to the left of any SMS campaign in the SMS Sends table and then click the blue View Report button at the top of the section to enter the full report for that specific SMS campaign.



Search for a specific SMS campaign by using the search bar at the top right corner of the SMS Sends table. Type in your search query and the table will filter results to match the typed text. You can also select multiple SMS messages to combine or compare reports.

Refer to the *SimplyCast SMS User Guide* for more information on SMS reporting.

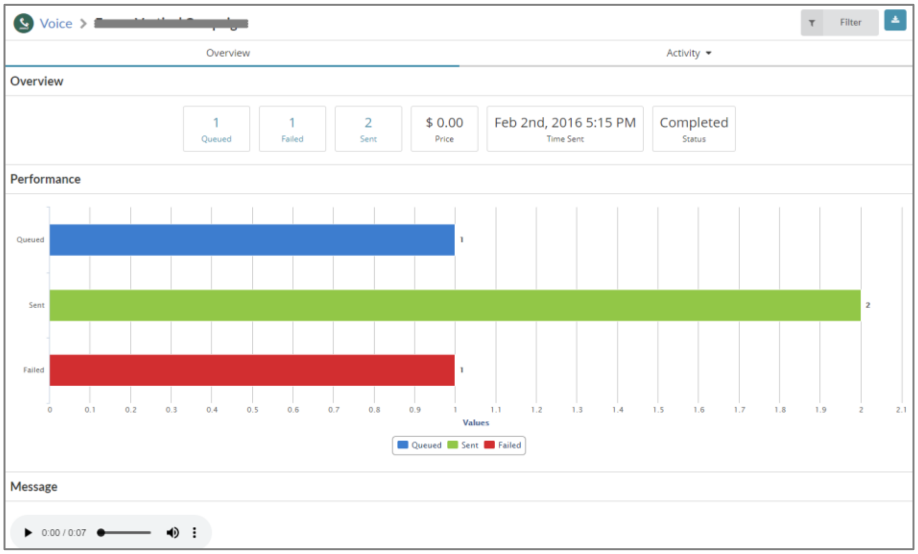
Voice Sends

If you have included any voice elements in your SimplyCast 360 campaign, you will see them in the Voice Sends table.

This table contains up to six columns of information:

- **Campaign Name:** The name of the voice campaign given to it when it was created as part of the SimplyCast 360 campaign.
- **Status:** The current status of the voice campaign, whether active or not.
- **Message:** The text of the voice message configured in the Voice Editor.
- **Sent:** The total number of voice messages sent successfully.
- **Failed:** The number of voice messages that failed to send as part of the voice campaign.
- **Price:** The total cost (if any) incurred by sending the voice messages to contacts.

Click on the checkbox located to the left of any voice campaign in the Voice Sends table and then click the blue View Report button at the top of the section to enter the full report for that specific voice campaign.



Search for a specific voice campaign by using the search bar at the top right corner of the Voice Sends table. Type in your search query and the table will filter results to match the typed-in text. You can also select multiple voice messages to combine or compare reports.

Refer to the *SimplyCast Voice User Guide* for more information on Voice reporting.

Glossary

API (Application Programming Interface): A tool that allows information to be easily transferred between two systems by either pushing or pulling

Campaign: Each specific communication project created within the SimplyCast 360 application, also the entire SimplyCast 360 project in and of itself

Canvas: The workspace in which users drag and drop elements to create a campaign

Connection: 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

Connection Settings: The configurable settings relating to a connection between two drag-and-drop elements that details the action required in order for a contact to pass through into the next element of the campaign

Content Reminder: An email reminder that can be set up to remind the campaign owner to update the content in any of the Campaign elements used in the SimplyCast 360 campaign at a designated time

Creation Panel: The section on the left side of the SimplyCast 360 canvas and contains all the SimplyCast 360 elements that can be dragged and dropped into the canvas, sorted into multiple tabs

Crosscheck: A function that looks at all the elements and connections within a campaign and determines whether there are any issues that need to be resolved before they can be activated

CRM (Contact Relationship Manager): A repository tool where users can store and manage contacts to be used in campaigns

Decision: A function that allows for the creation of multiple options to help determine which path a contact will continue down in your campaign depending on whether they meet specific criteria

Delay: A function that allows a user to pause a contact in the SimplyCast 360 campaign for a specific period of time

Dropdown: A selection tool wherein an information field is clicked, and a list of options appears to make a selection from

Element: One of the various tools or communication channels available for users to drag and drop onto the canvas and configure as part of a SimplyCast 360 campaign

Element Crosscheck: A settings section for a drag-and-drop element in a SimplyCast 360 workflow that tells the campaign creator if there are any setup issues with the element that may prevent its being activated

Filter: The process of narrowing down search results to meet specified criteria, such as a particular date, time, location, title, etc.

Flexible Delay: A delay that can be set to customized lengths of time, rather than a specific, fixed time. (e.g. every third Sunday; every Monday, Wednesday, and Friday; etc.)

Fixed Offset Delay: A delay with a fixed amount of time before the contacts will continue their progress in the campaign (e.g 4 weeks, 1 day, etc.)

Grid: The pattern of hashed lines appearing on the SimplyCast 360 canvas that serve to help keep campaigns organized, though can be hidden if desired

Interactions: The number of contacts who pass through each element in a SimplyCast 360 campaign, displayed in the bottom right-hand corner of a drag-and-drop element

Keyword: A word or short phrase used in relation to the SMS Shortcode element which users can use to text into a designated shortcode to receive a pre-configured reply

Modal: Appearing as a pop-up window on your web page (e.g. as in a pop-up form that appears a certain amount of time after a visitor arrives on the page)

Pipeline: A organizational feature that allows you to create and manage funnels to progress contacts through, whether manually or through actions they take as part of a SimplyCast 360 campaign

Platform: The amalgamation of the tools and channels SimplyCast offers in its web-based interface

Settings Panel: The section on the right side of the screen in the SimplyCast 360 canvas. 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

SimplyCast 360: A channel within the SimplyCast platform that allows users to create workflow campaigns comprised of various drag-and-drop elements as well as configurable settings and rules

Shortcode: A five or six-digit phone number contacts can use to text keywords to, to receive pre-set information back

Status: The condition a campaign is in terms of the creation or sending process: such as active, aborted, complete, etc.

Task: An action that a designated account user must complete before a contact can move forward in a SimplyCast 360 campaign. Tasks can be created either manually in the CRM or automatically in a SimplyCast 360 campaign.

Template: A copy of an existing SimplyCast 360 campaign, with all the elements and connections intact that can be selected and used without needing to build a new campaign from scratch.

Trigger: The act of causing a contact to pass from one stage of a campaign to the next

Widget: Tools other than elements available in the SimplyCast 360 platform that you can use to help build your campaign and make it more user-friendly