AUTORESPONDER USER GUIDE

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Overview

Email Autoresponder allows organizations to easily map out and automate common processes in order to make day-to-day communication more efficient. Autoresponder is a communication tool that allows you to create a multi-step email campaign in an interface where each step can be integrated into a workflow and deployed automatically.

With Autoresponder, you are able to use a variety of drag-and-drop elements to create workflows using rules and delays to determine which messages are sent to whom, and when exactly they are sent. Once you have a workflow structure set up with all the elements and delays required, you are able to create and customize content for each of the email messages.

Autoresponder Dashboard

In order to set up and deploy an Autoresponder project in the SimplyCast platform, first you will need to go to the Autoresponder dashboard. Autoresponder can be found in the top bar in the Applications dropdown menu. From here, you will be brought to the main Autoresponder dashboard where you are able to create a new project, copy an existing project from a template, see a list of all the Autoresponder campaigns you have already created, and view the ones that are currently active as well as any that are pending activation.

From the Autoresponder dashboard, you are able to:

Create a New Autoresponder Campaign

If you wish to create a new Autoresponder campaign, there is a green Create Empty Campaign button at the top of the Autoresponder 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 Autoresponder campaign creation and scheduling process. Or, click Cancel to close the pop-up without creating a new Autoresponder campaign.

You can also create a new Autoresponder campaign using a pre-made campaign template. Click the green Create Campaign From Template button to be directed to the

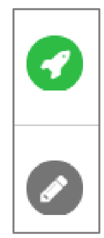
Account Templates page. Refer to the *Templates* section for more information about campaign templates.

View the List of Autoresponder Campaigns

Below the Create Campaign button, you will see a list of all the Autoresponder 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:

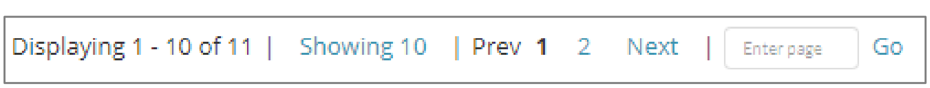
- **Name:** The name you gave your Autoresponder campaign
- **Status:** Either a green or gray icon indicating whether the Autoresponder campaign is active or inactive (green meaning active, gray meaning inactive)
- **Created On:** The date and time the campaign was created
- **Last Modified:** The date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



Navigate Multiple Pages of Autoresponder Campaigns

To view an Autoresponder campaign that does not appear on the first page:

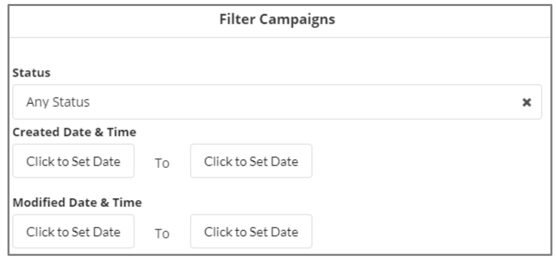
- Navigate to the bottom of your screen where you will find the page numbers indicating the total number of pages of Autoresponder campaigns you have created.
- If the campaign you are looking for is not on the first page, click the "Next" button to look through older campaigns on later pages.
- Or,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



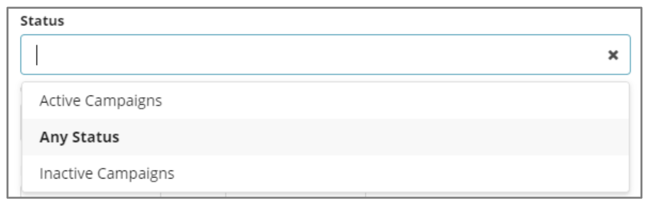
Filter Autoresponder Campaigns

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

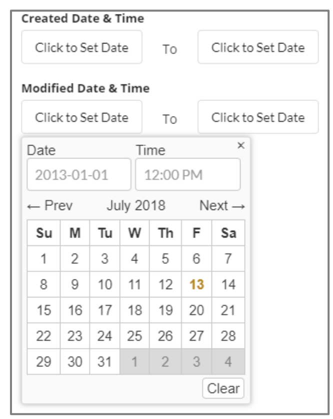
To filter your campaigns:



- 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 Autoresponder Campaigns

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

Edit an Autoresponder Campaign

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

To edit an Autoresponder campaign:

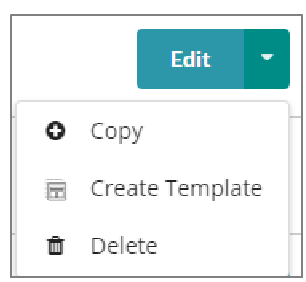
- Click the blue Edit button located on the far-right side of the screen across from the corresponding campaign name.
- Make your edits in the Automation Flow Editor and click Save at the bottom of the page to save your edits. Or, click Back to Dashboard to return to the main Autoresponder dashboard without making any changes. Refer to the *Automation Flow Editor* section to learn more about editing Autoresponder campaigns.

Copy the Structure of an Autoresponder Campaign

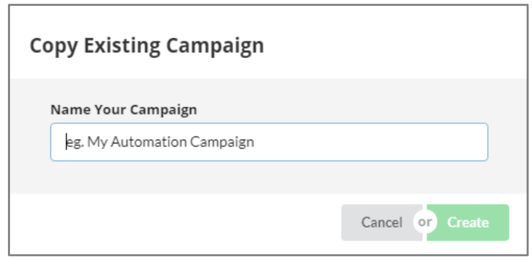
You can copy the structure of an existing Autoresponder campaign to create a new campaign using the same structure.

To copy an Autoresponder 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.



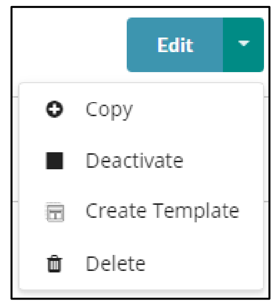
- A pop-up window will appear to name your new campaign. Enter the name and click the green Create button. Your new campaign will now appear in the list of campaigns on the Autoresponder dashboard.
- Or, click Cancel to close the pop-up window without copying a campaign.



[**Note:** Copying an Autoresponder campaign will not only copy the structure of the campaign, but all the content, settings, delays, etc.]

Create a Template of an Autoresponder Campaign

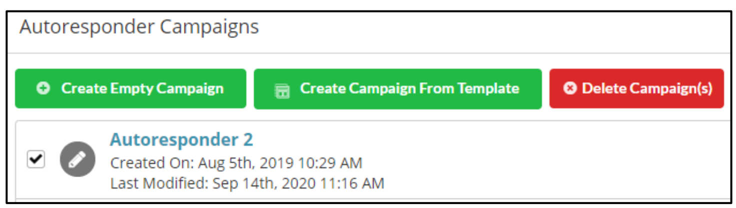
A template is a version of the Autoresponder flow that is saved to your Templates section for reuse by yourself of anyone else on your account or account network (depending on how it is shared), with all the elements and connections intact. This is useful for flows you may need to recreate frequently, 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 Autoresponder templates.



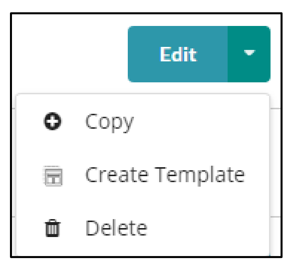
Delete an Autoresponder Campaign

There are two ways to delete an Autoresponder 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 From Template button.



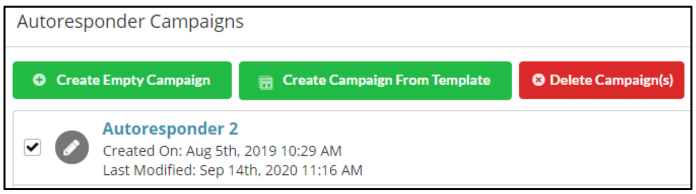
- Locate the blue Edit button on the far-right side of the screen across from the corresponding campaign name and click the dropdown arrow beside it. Select the Delete option. Either of these actions will cause a Confirm Delete pop-up to appear. This pop-up will display the name of the campaign you wish to delete and explain that deleting campaigns cannot be undone.



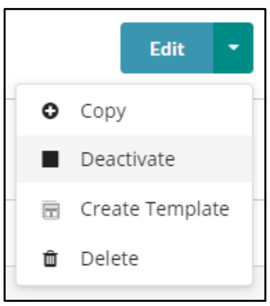
- Click the checkbox at the bottom of the pop-up to confirm that you want to delete the campaign.
- Click the red Delete button to delete the campaign.

Create an Autoresponder Campaign from a Template

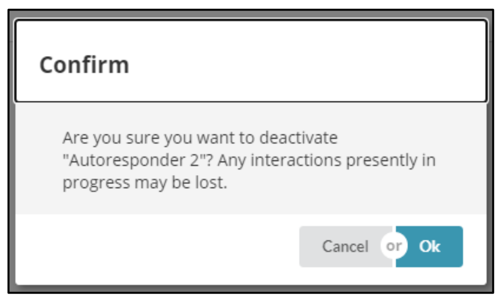
To create a new Autoresponder campaign using a pre-created template, click the green Create Campaign From Template button in the Autoresponder dashboard. You will be directed to the Templates page where you are able to choose from a selection of templates available to your account and account network (if any). Refer to the *Templates* section to learn more about templates.



Deactivate an Autoresponder Campaign

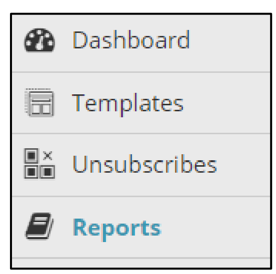


To deactivate an active Autoresponder campaign so that no more messages will be sent and contacts will no longer move through the automated campaign, click the arrow button next to the blue Edit button across from an active campaign you wish to deactivate. Select the Deactivate option that appears in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

You can view reports for any Autoresponder 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 Autoresponder 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 Autoresponder reports, please refer to the *Reports* section.

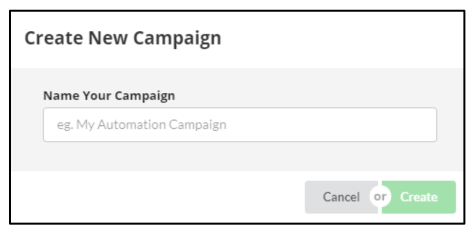
Automation Flow Editor

The Autoresponder 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 Autoresponder 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 an Autoresponder 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:

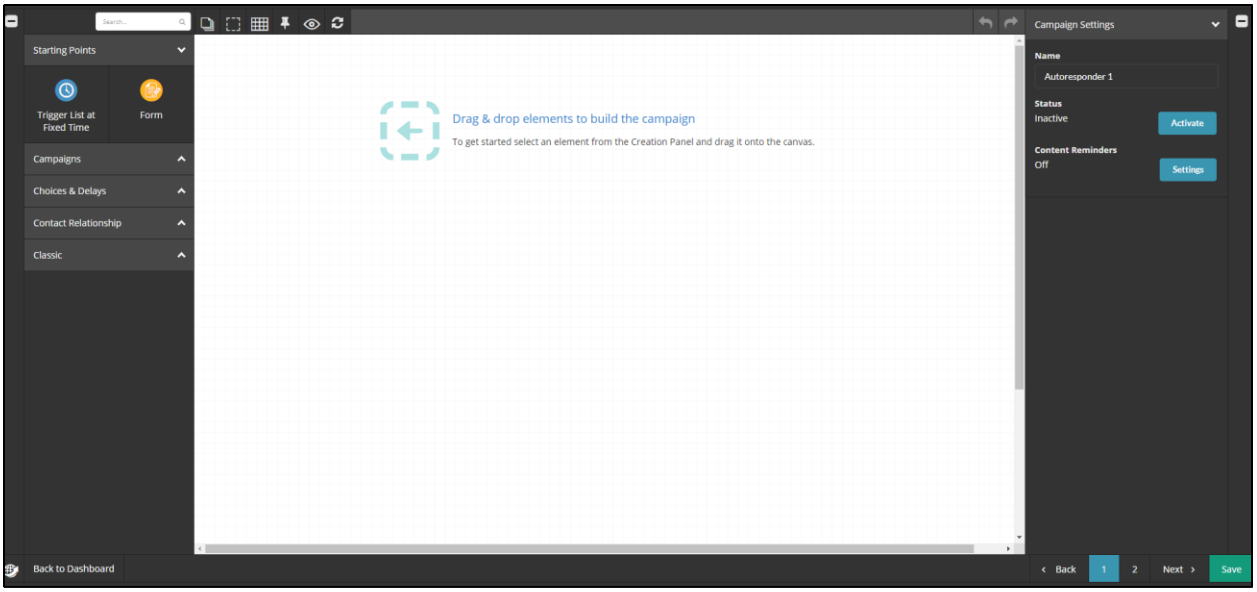


- From the Autoresponder dashboard, click the green Create Empty Campaign button.
- A pop-up will appear where you will be asked to name the campaign. Type the name into the textbox provided.
- Click the green Create button to create the campaign, close the sidebar, and be redirected to the Automation Flow Editor. Or click Cancel to close the pop-up without creating a campaign.

[**Note:** You can also create a new campaign using a pre-made template. Refer to the *Templates* section for more information.]

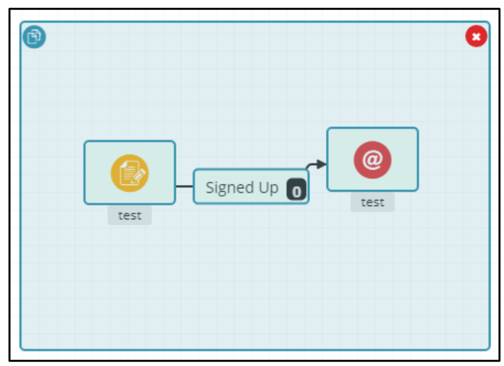
The Automation Flow Editor is divided into four main sections: the settings panel, the creation panel, the navigation bar, and the canvas.

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.



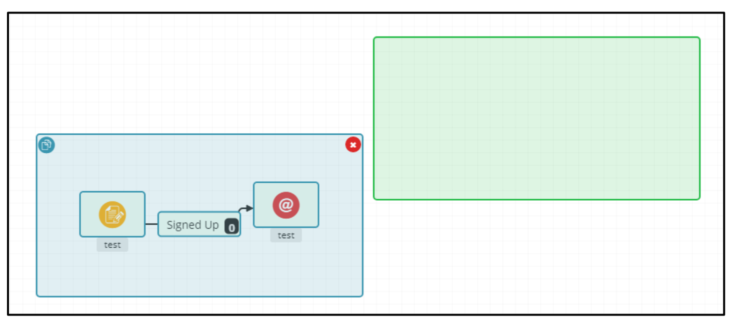
You are also able to highlight a section on the canvas containing multiple elements.

To do this:



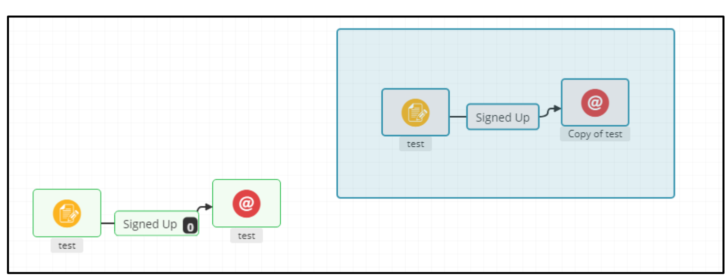
- Click and hold the mouse down on a blank section of the canvas and drag the mouse to create a blue box.
- Drag the mouse until the blue box covers all the elements you want highlighted, then release the mouse.

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 blue Copy All Selected icon, which allows you to create a second copy of the highlighted section in the canvas.

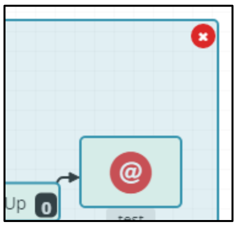


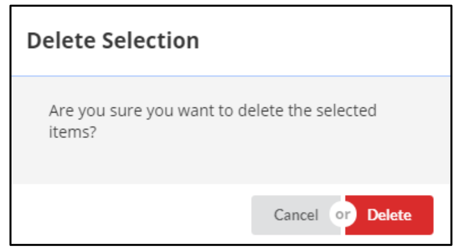
To do this:

- 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.



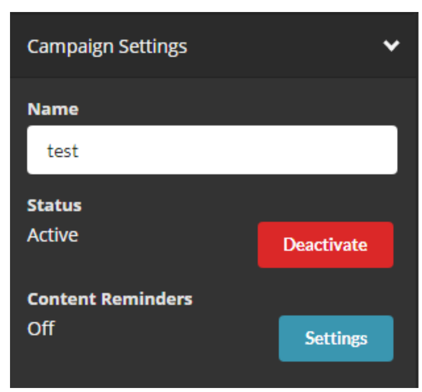


The last thing you can do with highlighted sections is move them around the canvas; this moves all the highlighted elements, widgets, and connections simultaneously as a block. To do this, click and hold the mouse down anywhere inside the highlighted section, and drag and drop the section around the 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 Autoresponder 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 on the right of your screen when there are no elements or connections selected on the canvas.

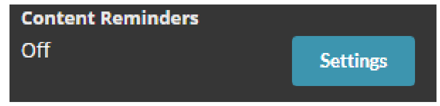
The campaign settings you can adjust are the following:

- **Name:** Edit the name of the campaign. Type the desired name into the textbox provided.
- **Status:** Activate or deactivate the entire 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.

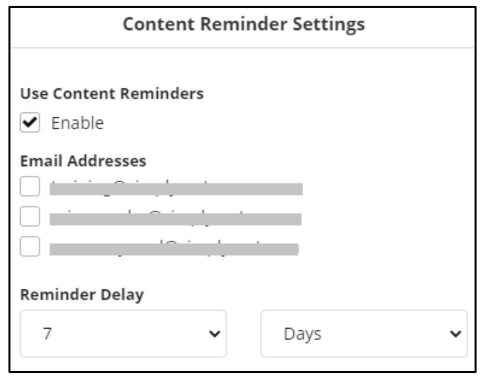
[**Note:** Keep in mind the campaign will not become active or inactive until you save the project after clicking the Activate/Deactivate button.]

- **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.



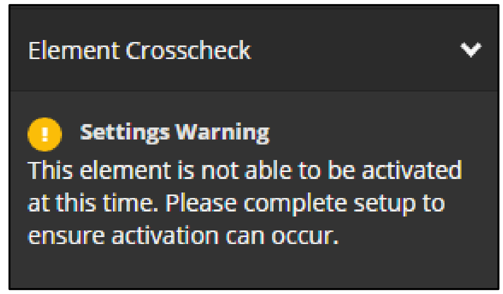
- When the Use Content Reminders checkbox is clicked, two more fields will appear in the sidebar: Email Addresses, and Reminder Delay. Disabling content reminders will cause the other two fields—Email Addresses and Reminder Delay—to disappear.
- The Email Addresses field is where you must choose at least 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 second dropdown choose a unit of time (Days, Weeks, or Months) and in the first dropdown, choose a unit number. 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 "Weeks" in the second dropdown and "4" in the first dropdown, the system will send a content reminder every four 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.

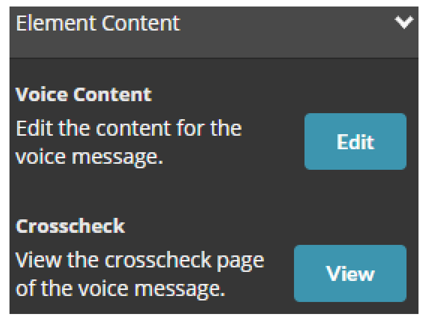
Element Crosscheck

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.

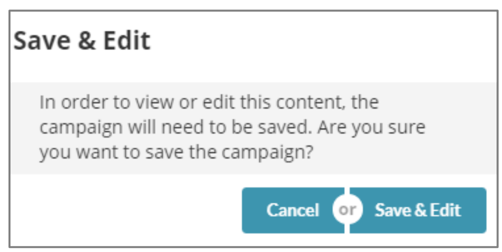


Element Content

The Element Content section will appear in the Settings Panel when an element with editable content is selected on the canvas (e.g. Form, Email Campaign, 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

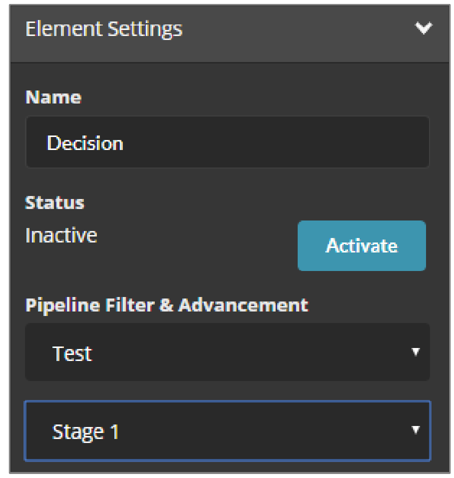
Element Settings are the settings that apply to a specific element. These settings vary, as certain settings are applicable exclusively to certain elements, but some are shared by all.

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 form can be the starting point for multiple Autoresponder 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.



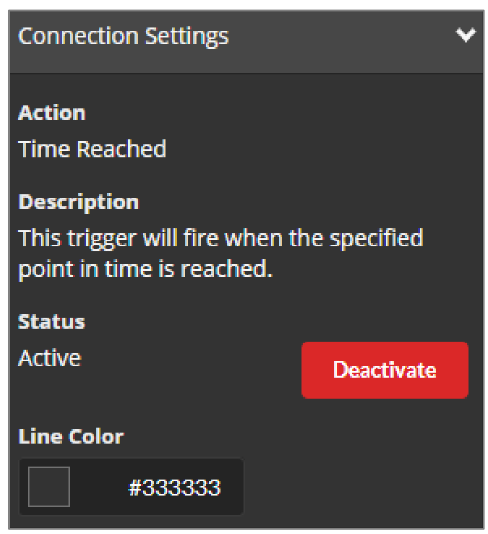
For detailed instructions on these settings and a list of other settings specific to each element, refer to the section in this guide for the element you're working with.

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
- **Description:** A description of the condition under which the action will occur
- **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



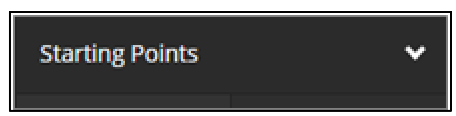
[**Note:** This Settings Panel section will only appear in the panel when you have a connection textbox between two elements selected with your mouse. Refer to the section in the guide for the element you're connecting for detailed instructions on editing connection settings.]

Creation Panel

The Creation Panel is on the left side of the screen and contains all the Autoresponder elements that can be dragged and dropped into the canvas, sorted into multiple tabs. To add an Autoresponder element to your campaign, either drag and drop the icon into the canvas or double-click the icon. There are five 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 Autoresponder campaign and are typically used as a way to bring contacts into the flow.
- **Campaigns:** The element in this section in the Email element that can be used to send to contacts who are part of the project and can be set up and customized in the respective editor.
- **Choices and Delays:** These elements can be used to create rules to determine when the next part of the Autoresponder campaign will interact with contacts, which contacts it will interact with, and in what way they will interact.
- **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:** The element in this section in the Email Classic element which is an older version of the Email tool.

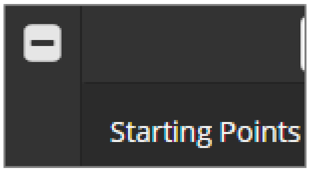


To open a tab in the Creation Panel, click on the tab name you want to open. The tab will expand to display the elements within that tab. To close the tab, click the tab name again.

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.

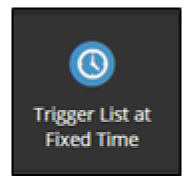
Starting Points

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 Autoresponder campaign.

There are two 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.
- **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.

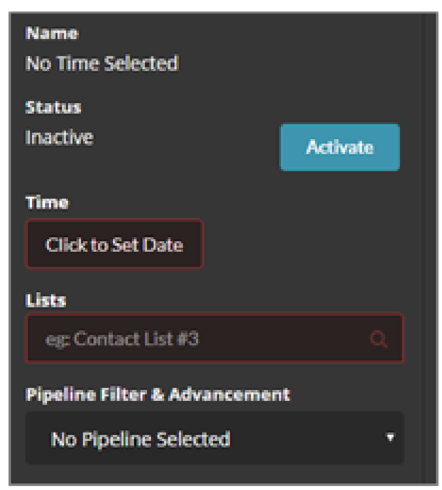
Trigger List at a Fixed Time



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:



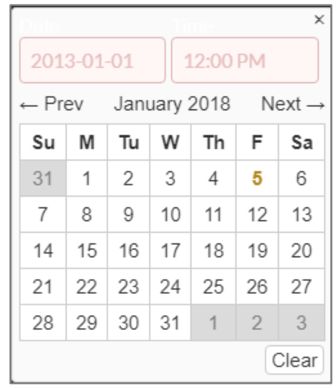
- Click and drag or double click the Trigger List at Fixed Time element to add it to your canvas.
- Once the Trigger List at Fixed Time element is on your canvas and is selected with your mouse, five fields will appear in the Settings Panel to the right of the canvas.

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

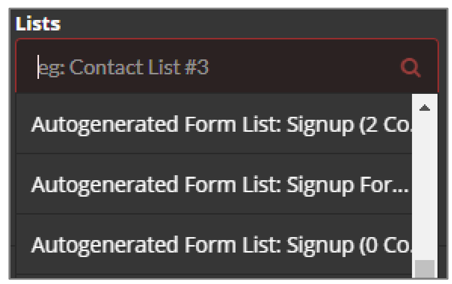
expected. Activating the element will turn this button into a red Deactivate button. Click this red button to deactivate the activated element.



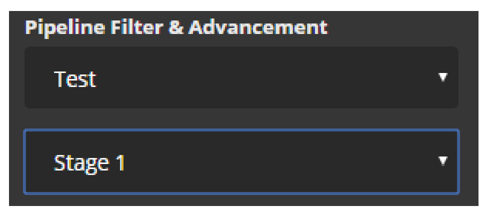
[**Note:** Keep in mind the element's status will not change until you save the campaign, or unless all the element's settings are configured correctly.]

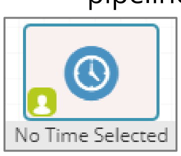
> **Time:** Choose the date and time the list(s) will be sent through the flow. Click on this field and a calendar dropdown will appear where you can select when you wish the campaign to be delayed until. If the time is already set, you can click the textbox containing the set time to change it if you 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.

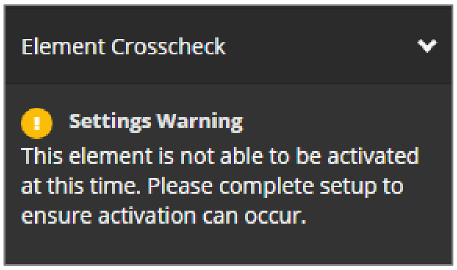


> **Pipeline Filter & Advancement:** Choose whether you would like contacts to progress through any pipelines you may have in the CRM. In the dropdown menu in this field, choose the pipeline you would like contacts to be added to. A second dropdown will appear to choose the stage of that pipeline contacts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



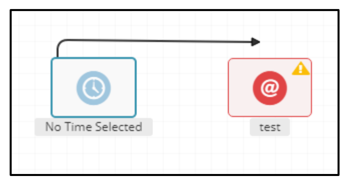


[**Note:** If a pipeline stage is used with a Starting Point element and a contact enters the campaign who is already in a greater stage of the pipeline that the element is set to, the contact will not regress to that stage in the pipeline. Their stage will remain unchanged until they reach a higher set pipeline stage in the campaign. Contacts will only progress through a pipeline if they are currently in a lower stage of the associated pipeline (or not in the pipeline to begin with). In the event a pipeline stage is associated with a Campaign element, when a contact reaches this element, they will only continue if their current pipeline stage is lower than that set to the pipeline or unset. If their current stage in the associated pipeline is higher than that set by the element, the contact's progress in the campaign is halted.]

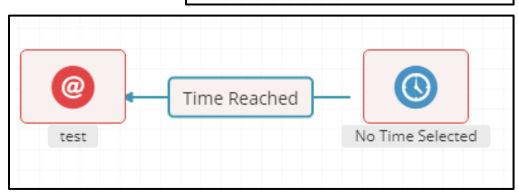


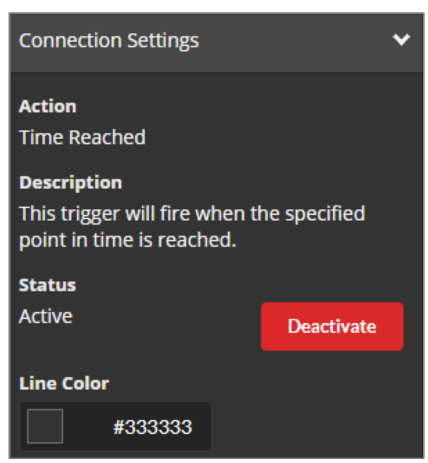
- If there is an issue with the element setup that needs to be resolved before the element can be activated, there will be a yellow or red exclamation point symbol in the top right corner of the element to signify this. If this is the case, when you select the element with your mouse, an additional section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





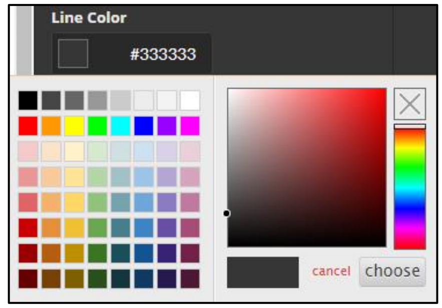
- Once a connection has been established between the Trigger List at Fixed Time element and at least one other element (multiple connections can be created between one element and multiple others), a textbox with the connection type will appear on the connection. Click on this textbox to open a new Connection Settings section in the Settings Panel.
- 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 give a description of the condition under which the action will occur. The third 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.

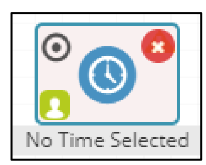
To choose a color:

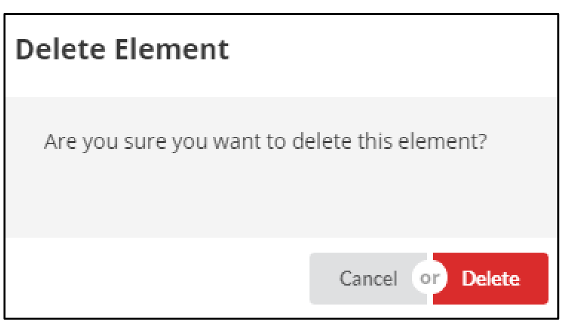


> Click on the color square in the field and a color selector will appear or enter the hex code of the color in the field next to the square.
> Choose your desired color from the pre-set swatches on the left side of the selector dropdown or use the right side to manually choose a color.
> Click the Choose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



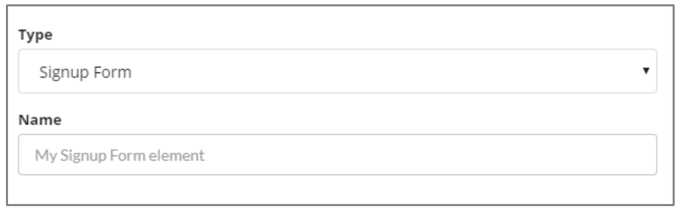


[**Note:** You will only receive the confirmation pop-up for deletion if the element has been activated or if the campaign has been saved.]

Form

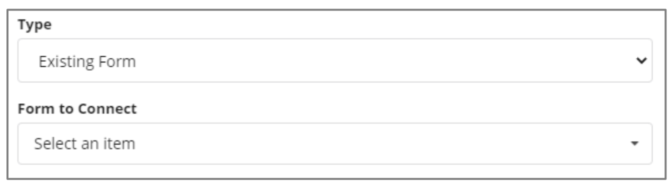
The next drag-and-drop element in the Starting Points tab is the Form element. This element allows you to create a form that can be hosted on a website, landing page, or stand alone as a shareable URL. This element is a good option to choose if you are collecting contact information.

To begin setting up this element:



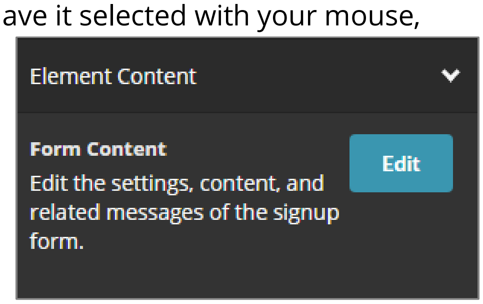
- Click and drag the Form element or double click it to add it to your canvas.
- When you place the element, a sidebar will appear with two fields: Type and Name.
- In the Type field, select from the available dropdown menu whether to create a new form for this element or use an existing form in the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

  > To create a new form, select this option and enter the name of the new form in the Name field below the Type field.



  > To use an existing form, 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 signup 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

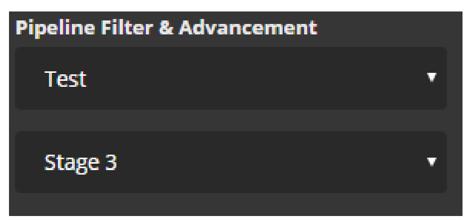
and settings of the form. Refer to the *SimplyCast Form Builder & Survey User Guide* for more information about creating and editing forms.

> **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.

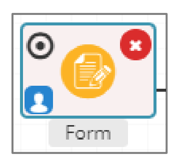
[**Note:** Keep in mind that changing the name of a form changes its name across the entire SimplyCast platform, not just this campaign. For example, one form can be the starting point for multiple Autoresponder or SimplyCast 360 campaigns, therefore if it is renamed in one campaign, the new name will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

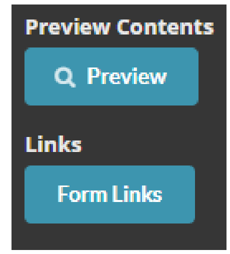


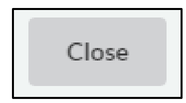
> **Pipeline Filter & Advancement:** Choose whether you would like contacts to progress through any pipelines you may have associated with the campaign. In the dropdown menu in this field, choose the pipeline you would like contacts to be added to. A second dropdown will appear to choose the stage of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



[**Note:** If a pipeline stage is used with a Starting Point element and a contact enters the campaign who is already in a greater stage of the pipeline that the element is set to, the contact will not regress to that stage in the pipeline. Their stage will remain unchanged until they reach a higher set pipeline stage in the campaign. Contacts will only progress through a pipeline if they are currently in a lower stage of the associated pipeline (or not in the pipeline to begin with). In the event a pipeline stage is associated with a Campaign element, when a contact reaches this element, they will only continue if their current pipeline stage is lower than that set to the pipeline or unset. If their current stage in the associated pipeline is higher than that set by the element, the contact's progress in the campaign is halted.]

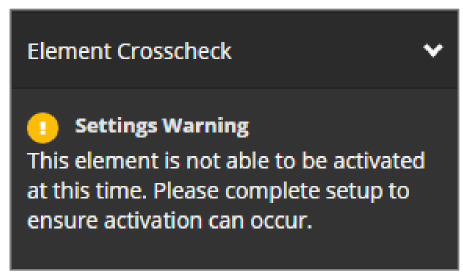
- Once the form has been created and configured, you will see two more fields in the Element Settings section: Preview Contents and Links.





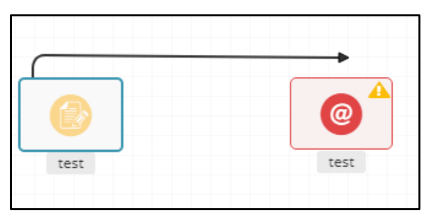
> **Preview Contents:** Clicking the blue Preview button will open a sidebar with a preview of the form. Click the gray Close button to close the Preview sidebar.

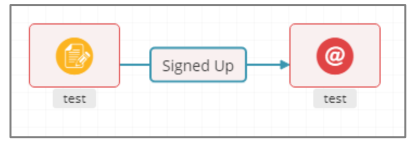
> **Links:** Clicking the blue Form Links button will open a sidebar containing the URL and code for the form that can be included in emails or embedded on a website. Copy and paste these links as needed. Click the gray Close button to close the Links sidebar. Refer to the next section in this guide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

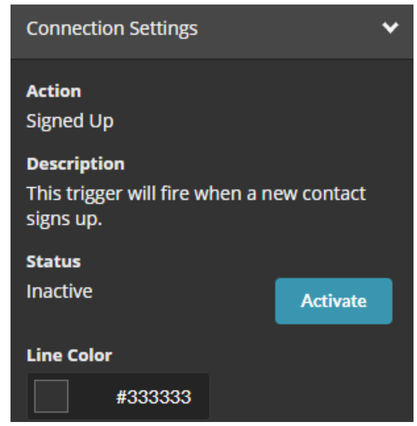


- If there is an issue with the element that needs to be resolved before the element can be activated, there will be a yellow or red exclamation point symbol in the top right corner of the element to signify this. If this is the case, when you select the element with your mouse, an additional section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



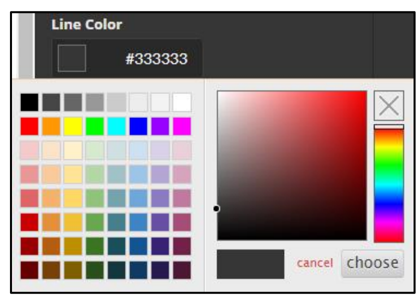




- Once a connection has been established between the Form element and at least one other element, a textbox with the connection type will appear on the line. Click on this textbox to open a new Connection Settings section on the right-hand side of the screen.
- There are four fields in the Connection Settings section. The first field is the Action field, which indicates the connection type (Signed Up), meaning someone submitted information using the form.
- The second field is the Description field which will give a description of the condition under which the action will occur.
- The third 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 third field is the Line Color field where you can choose the color for that connection's line.



To choose a color:

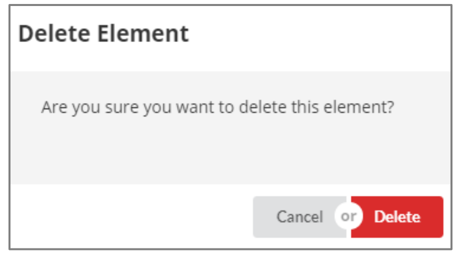
> Click on the color square in the field and a color selector will appear or enter the hex code of the color in the field next to the square.

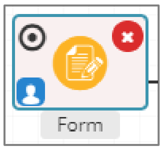
> Choose your desired color from the pre-set swatches on the left side of the selector dropdown or use the right side to manually choose a color.

> 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.



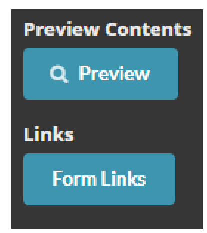


[**Note:** You will only receive the confirmation pop-up if the element has been activated or if the campaign has been saved.]

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 project:



- 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.

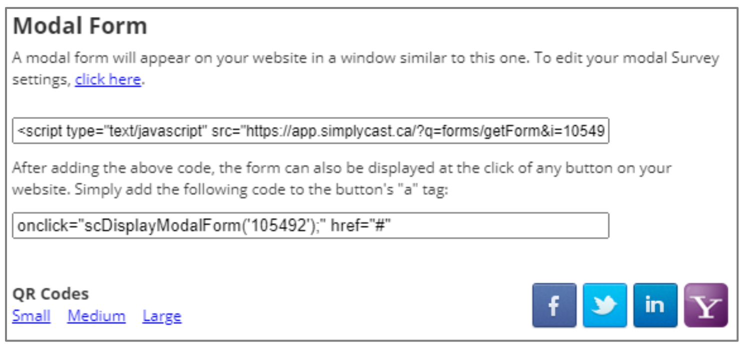
[**Note:** The two code options should only be used by users with knowledge of web design.]

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 embed it in 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) 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.
- Click the Close button at the bottom of the sidebar to close the Links sidebar and return to the Autoresponder campaign.

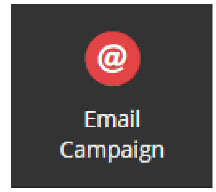
[**Note:** If you have knowledge of web design, the above options are readily available to you. If not, provide someone knowledgeable with these options and they should be able to assist you with the coding that's required.]

Campaigns

The second tab in the Creation Panel on the left side of the screen is the Campaigns tab. There is only one element in this tab for the communication channel that you can use to send messages out to your contacts.

This is:

Email Campaign



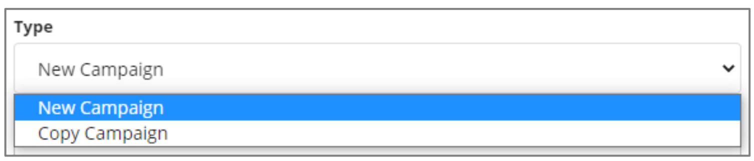
The drag-and-drop element in the Campaigns tab is the Email Campaign Element. This element allows you to create and send an email to your contacts when they reach a particular point in the campaign.

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.

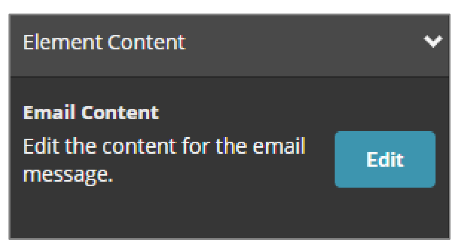
  > **Copy Campaign:** An email campaign created by copying an existing project. Choosing this option will produce another field in the sidebar where you must select the existing email campaign you would like to copy from the dropdown list.

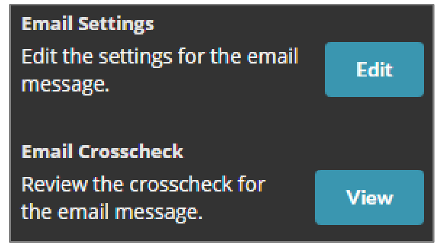


- The second field will ask you to enter a name for the new Email element. Enter a name into the field provided.
- Click the green Create button to create the element and close the sidebar. Or, click the gray Cancel button to close the sidebar without adding an Email Campaign element.

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

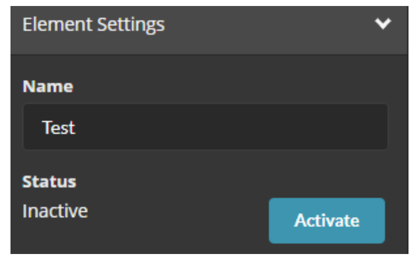
  > **Email Content:** Clicking the blue Edit button in the Element Content section will bring you to the Email application, where you can design, create, and edit the content of the email. Refer to the *SimplyCast New Email Editor User Guide* for more information about creating and editing email campaigns.





> **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.

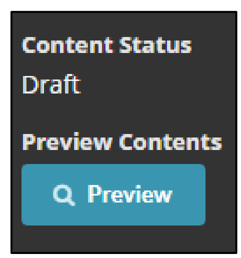


> **Name:** This field contains the name you selected when you added the element to your canvas. To change the name of your element, edit the name in the textbox provided.

> **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.

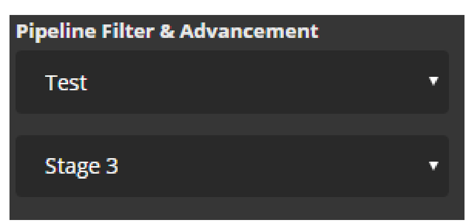
[**Note:** Keep in mind the element will not become active until you save the campaign.]

> **Content Status:** Once you have saved the Autoresponder 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, Prepared, etc.).



> **Preview:** Once you have saved the Autoresponder 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).

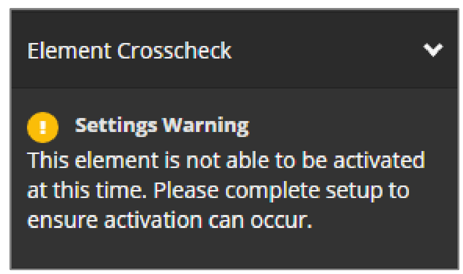
> **Subject Line:** Once you have finished the email campaign setup, the Subject Line field will appear in the Settings Panel below the blue Preview Contents button, containing the subject line you have included in the email setup.



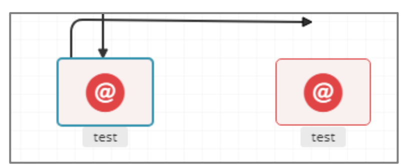
> **Pipeline Filter & Advancement:** Choose whether you would like contacts to progress through any pipelines you may have associated with the campaign. In the dropdown menu in this field, choose the pipeline you would like contacts to be

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.

[**Note:** If a pipeline stage is used with a Starting Point element and a contact enters the campaign who is already in a greater stage of the pipeline that the element is set to, the contact will not regress to that stage in the pipeline. Their stage will remain unchanged until they reach a higher set pipeline stage in the campaign. Contacts will only progress through a pipeline if they are currently in a lower stage of the associated pipeline (or not in the pipeline to begin with). In the event a pipeline stage is associated with a Campaign element, when a contact reaches this element, they will only continue if their current pipeline stage is lower than that set to the pipeline or unset. If their current stage in the associated pipeline is higher than that set by the element, the contact's progress in the campaign is halted.]



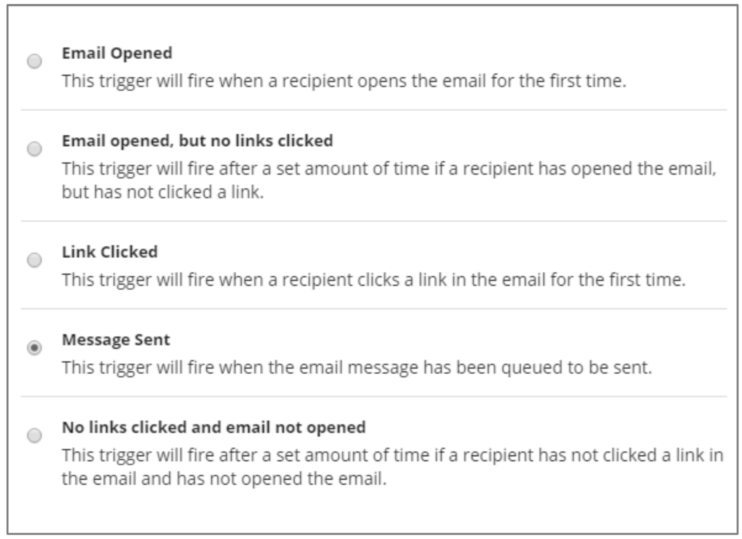
- If there is an issue with the element setup that needs to be resolved before the element can be activated, there will be a yellow or red exclamation point symbol in the top right corner of the element to signify this. If this is the case, when you select the element with your mouse, an additional section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

- 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.



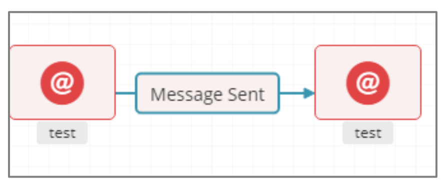
> **Email Opened, But No Links Clicked:** This means the campaign will continue through the connection after a set amount of time if a recipient has opened the email but has not clicked any links in it.

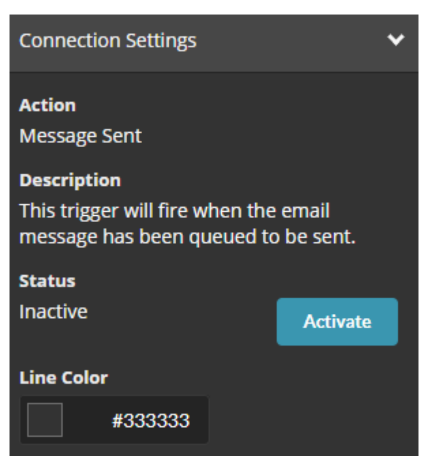
> **Link Clicked:** This means the campaign will continue through the connection when a recipient clicks a link (or a specific link) in the email for the first time.

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

> **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.

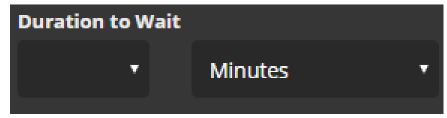




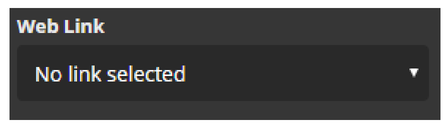
- Click on this textbox to open a new Connection Settings section in the Settings Panel.
- Depending on the connection option you choose, there are will be either four or five fields in the Connection Settings section. The first field is the Action field, which indicates the connection type selected (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 give a description of the condition under which the action will occur.
- 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.]

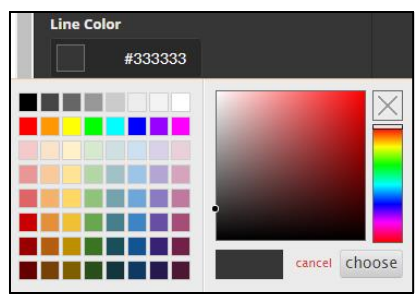


- If you chose the “Email Opened, But No Links Clicked” or “No Links Clicked and Email Not Opened” option, the next field will be Duration to Wait. This is where you decide how long the system will wait for the email recipient to either open the email or click the link before triggering the connection. 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:

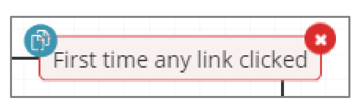


> Click on the color square in the field and a color selector will appear or enter the hex code of the color in the field next to the square.

> 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.

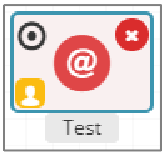
> Click the Choose button at the bottom right side of the color selector to lock in your color or click Cancel to close the selector dropdown without picking a color.

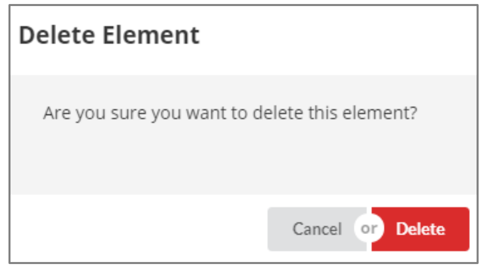
- To copy a connection, hover your mouse over the textbox appearing on the connection to show a blue button at the top left of the textbox. Copying a connection saves you from having to re-configure the settings for any additional connections requiring the same conditions, saving time. Click



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.]

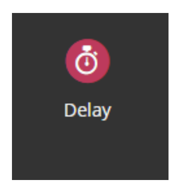
Choices and Delays

The third 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:

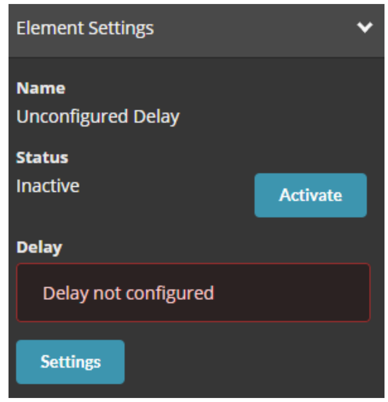
- **Delay:** This element allows you to pause a contact in the Autoresponder campaign for a specific period of time before it resumes automatically.
- **Delay Until Date on Contact:** This element allows you to send contacts through the campaign at a pre-specified that is unique to each contact.

Delay



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 Autoresponder campaign for a specific period of time before it resumes automatically.

To begin setting up this element:



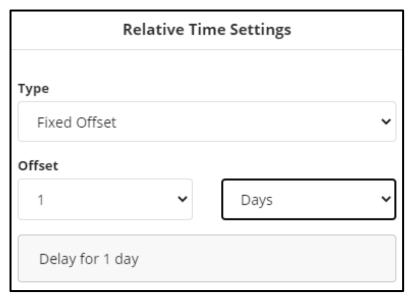
- Click and drag the Delay element or double click it to add it to the canvas.
- Once you have placed the element onto the canvas and have it selected with your mouse, four additional fields will appear in the Settings Panel on the right-hand side of your screen:

  > **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.

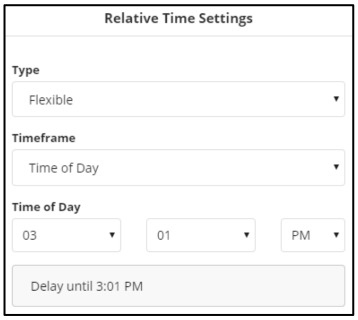
[**Note:** Keep in mind the element will not become active until you save the campaign.]

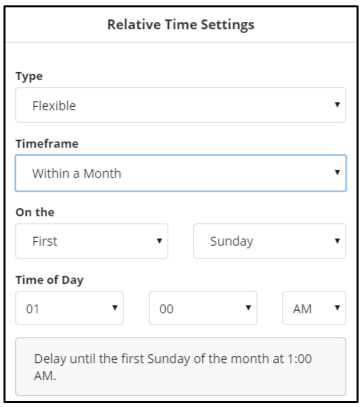
> **Delay:** This field contains two sections. The first section is a textbox which describes the length of the chosen delay. By default, this textbox will say "Delay Not Configured." The second section is a blue Settings button where you can configure the amount of time the system will pause the campaign 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.

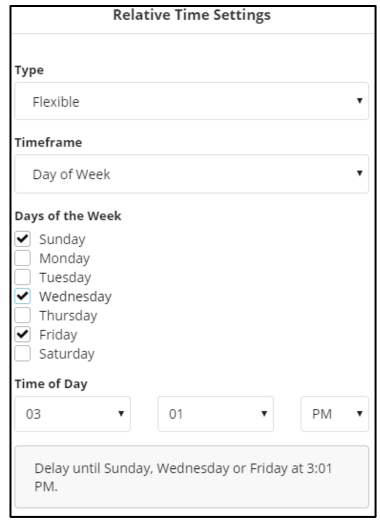


>> Fixed offset means that the delay will be a fixed amount of time before the contacts will continue their progress in the campaign. Choosing Fixed Offset as your delay type will cause the Offset field to appear. This field includes two dropdowns and a textbox. Choose your unit of time from the dropdown 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 amount of 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.



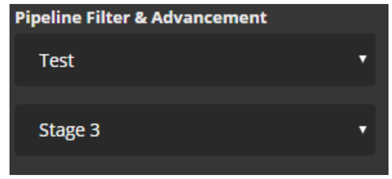


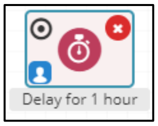


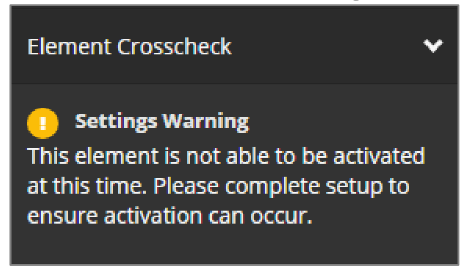
[**Note:** For example, say you selected the Day of Week option in the Timeframe dropdown Menu and chose Sunday, Wednesday, and Friday at 3:01PM in their respective fields. The textbox below the fields will indicate the delay will be in place in the campaign until the next closest day, either Sunday,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

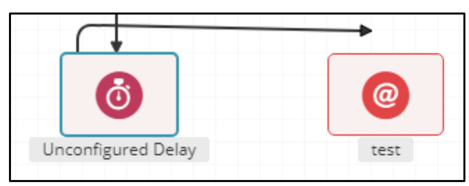




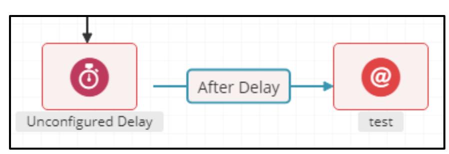


[**Note:** If a pipeline stage is used with a Starting Point element and a contact enters the campaign who is already in a greater stage of the pipeline that the element is set to, the contact will not regress to that stage in the pipeline. Their stage will remain unchanged until they reach a higher set pipeline stage in the campaign. Contacts will only progress through a pipeline if they are currently in a lower stage of the associated pipeline (or not in the pipeline to begin with). In the event a pipeline stage is associated with a Campaign element, when a contact reaches this element, they will only continue if their current pipeline stage is lower than that set to the pipeline or unset. If their current stage in the associated pipeline is higher than that set by the element, the contact's progress in the campaign is halted.]

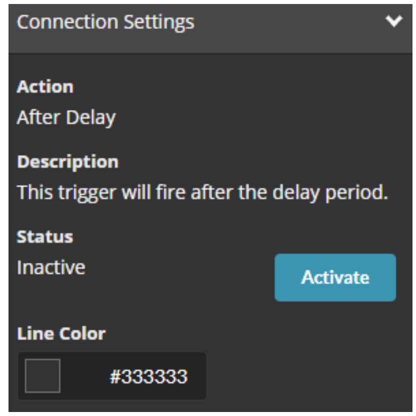
- If there is an issue with the element that needs to be resolved before the element can be activated, there will be a yellow or red exclamation point symbol in the top right corner of the element to signify this. If this is the case, when you select the element with your mouse, an additional section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



- 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 a new Connection Settings section in the Settings Panel.
- 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 give a description of the condition under which the action will occur.

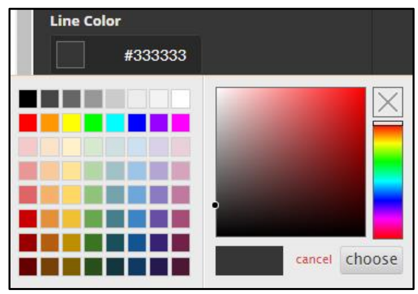


- The third field is the Status field where you can activate or deactivate the connection by clicking the red or blue button respectively. Activating a connection means that the connection will be able to be used as part of the campaign and should perform as expected.

[**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:



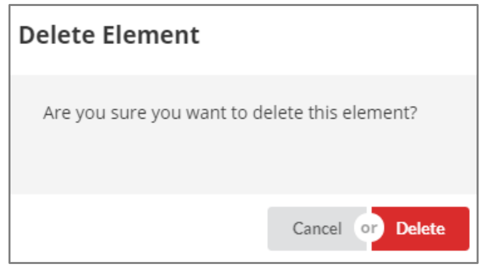
  > Click on the color square in the field and a color selector will appear or enter the hex code of the color in the field next to the square.

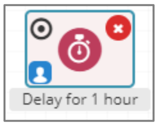
  > Choose your desired color from the pre-set swatches on the left side of the selector dropdown or use the right side to manually choose a color.

  > 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.

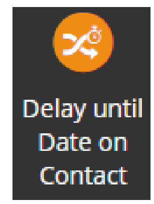
- Delete a connection by hovering over the connection's textbox and clicking the red "X" button.
- To delete the element from the campaign, hover your mouse over the element and click the red "X" button in the top right corner that appears. A pop-up window will appear asking you to confirm the deletion. 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.]

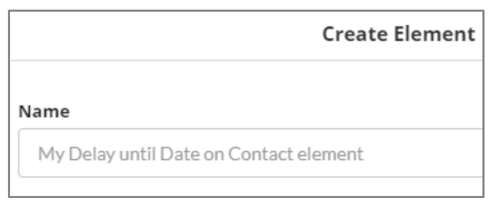
Delay Until Date on Contact



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.

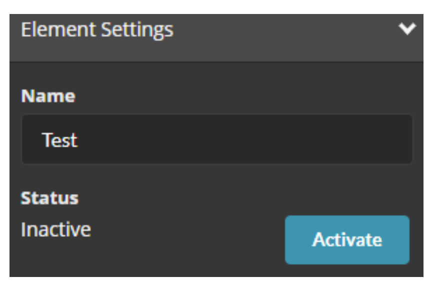
To begin setting up this element:

- 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.

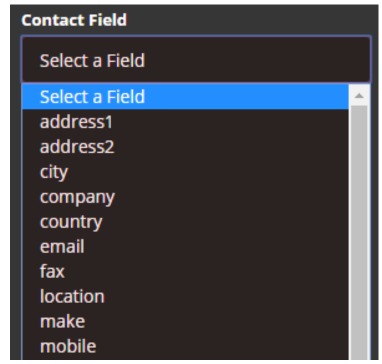
- Once you have placed the element onto the canvas and have it selected with your mouse, six additional fields will appear in the Element Settings section on the right-hand side of your screen:
  > **Name:** This field contains the name you selected when you added the element to the canvas. To change 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.

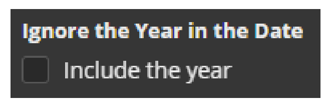
[**Note:** Keep in mind the element will not become active until you save the campaign.]

> **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.



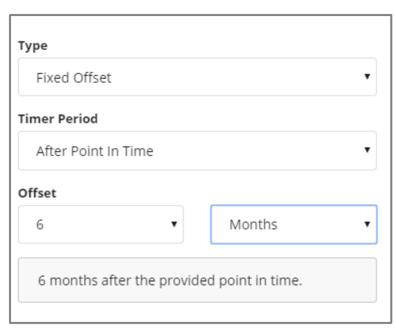
[**Note:** It is recommended you select a field with a Date data type for this element. This data type differs from the Date/Time data type in the sense that Date/Time requires that the information in the contact profile matches with both a specified date and time whereas the Date data type only looks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

> **Ignore the Year in the Date:** By default, the system will 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 “Include the Year” checkbox in the Settings Panel.

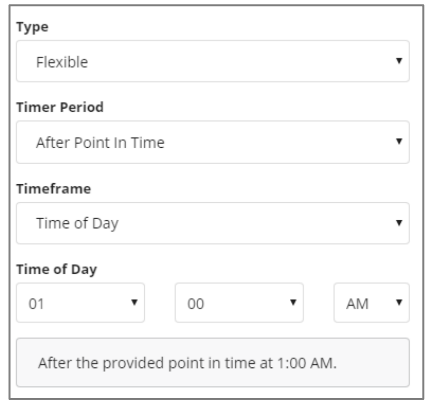


> **Offset:** This field contains a blue Settings button that you can use to determine when the contact will progress in the campaign before or after the date specified in their profile. Clicking this button will open a sidebar where you must choose when the offset will occur. Select a type of offset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

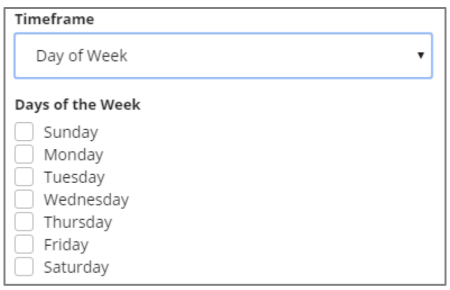
>> Choosing Fixed Offset as your offset type will cause the Timer Period and Offset fields to appear. The Timer Period field refers to whether the offset will occur before or after the point in time selected from the contact’s CRM field. Select either option from the dropdown provided. The Offset field 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.

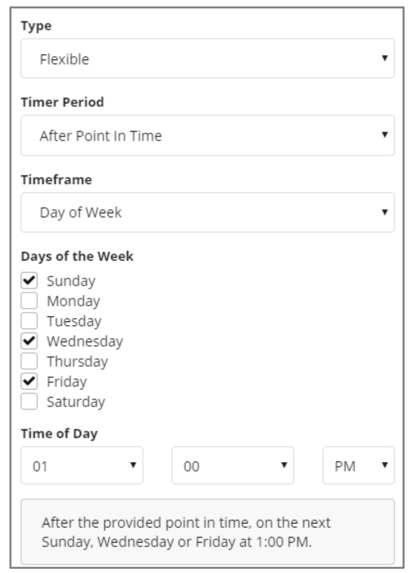


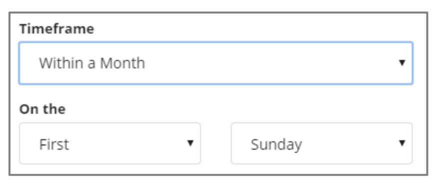
[**Note:** For example, if you selected “After Point in Time” in the Timer Period field, and then select “6” and “Months” in the Offset field, the textbox will explain that the contact will progress to the next step in the campaign six months after the date specified in their profile.]



>> 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.

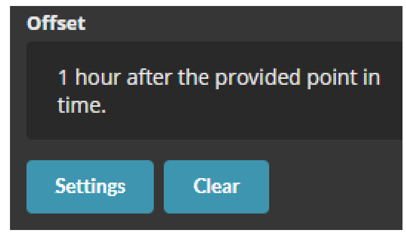




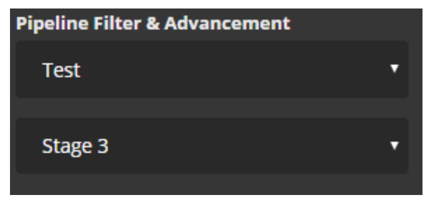


[**Note:** For example, say you selected After Point in Time offset type, the Day of Week option in the Timeframe dropdown menu, and chose Sunday, Wednesday, and Friday at 1:00PM in their respective fields. The textbox below the fields will indicate the contact will proceed to the next step in the campaign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

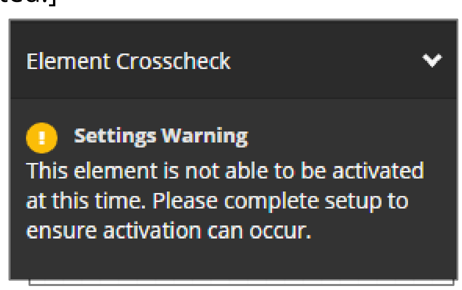


- **Pipeline Filter & Advancement:** Choose whether you would like contacts to progress through any pipelines you may have associated with the campaign. In the dropdown menu in this field, choose the pipeline you would like contacts to be added to. A second dropdown will appear to choose the stage of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



[**Note:** If a pipeline stage is used with a Starting Point element and a contact enters the campaign who is already in a greater stage of the pipeline that the element is set to, the contact will not regress to that stage in the pipeline. Their stage will remain unchanged until they reach a higher set pipeline stage in the campaign. Contacts will only progress through a pipeline if they are currently in a lower stage of the associated pipeline (or not in the pipeline to begin with). In the event a pipeline stage is associated with a Campaign element, when a contact reaches this element, they will only continue if their current pipeline stage is lower than that set to the pipeline or unset. If their current stage in the associated pipeline is higher than that set by the element, the contact's progress in the campaign is halted.]

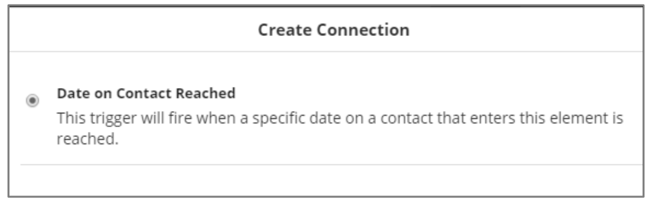
- If there is an issue with the element that needs to be resolved before the element can be activated, there will be a yellow or red exclamation point symbol in the top right corner of the element to signify this. If this is the case, when you select the element with your mouse, an



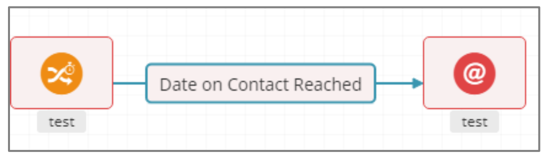
additional section called Element Crosscheck will appear in the Settings Panel. The Element Crosscheck section will describe the issue with the element and provide instructions on how to resolve it.

- 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.

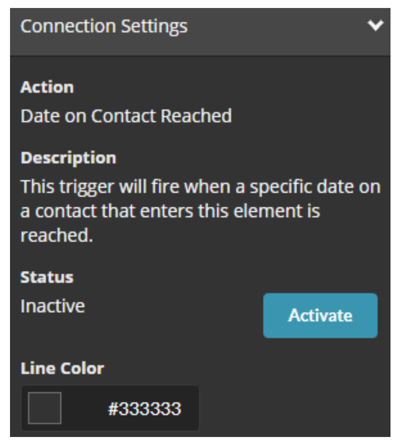
[**Note:** Some elements are not able to be connected to each other. For example, you cannot connect two Starting Point elements to each other.]



- 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 a new Connection Settings section in the Settings Panel.



- 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 give a description of the condition under which the action will occur.
- 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.

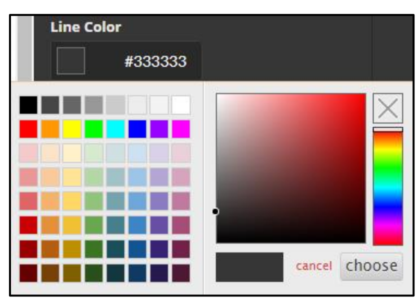


[**Note:** Keep in mind the connection will not become active until you save the campaign.]

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

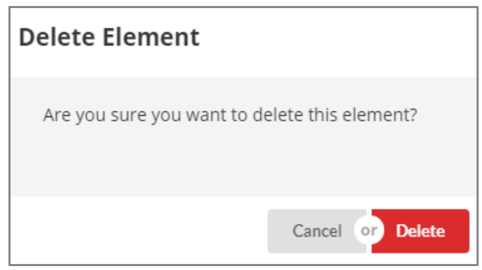
To choose a color:

> 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.



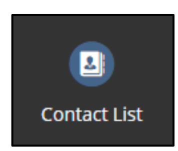
[**Note:** You will only receive the confirmation pop-up if the element has been activated or if the campaign has been saved.]

Contact Relationship

The fourth tab in the Creation Panel on the left side of the screen is the Contact Relationship tab. The element in this tab allows you to manage and complete tasks using the CRM.

This element is:

Contact List

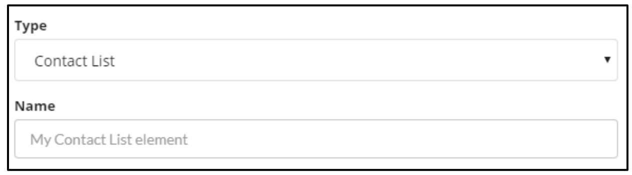


The first drag-and-drop element in the Contact Relationship tab is the Contact List element. This element allows you to place contacts into lists based on actions they have performed or input they submitted earlier in the campaign.

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.

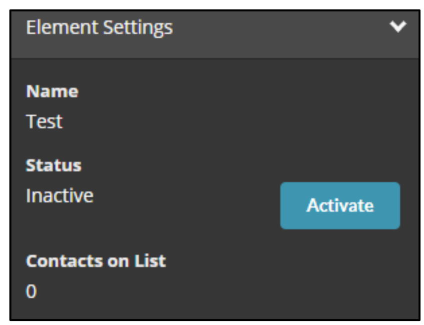


> If you choose to create a new list, the second field will ask you to enter a name for the new Contact List element. Type the name into the textbox provided.

> 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.

- 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:



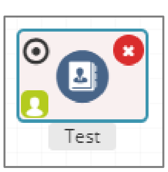
> **Name:** This field contains the name of the contact list you added, which cannot be changed from here.

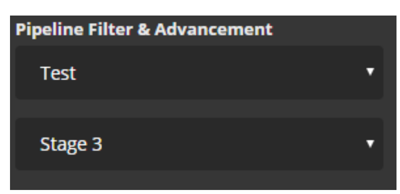
> **Status:** This field is where you can activate or deactivate the element by clicking the blue or red button respectively. Activating an element means that the element will be able to be used as part of the campaign and should perform as expected.

[**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.

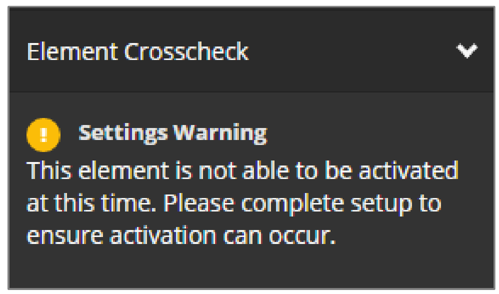
> **Pipeline Filter & Advancement:** Choose whether you would like contacts to progress through any pipelines you may have. In the dropdown menu in this field, choose the pipeline you would like contacts to be added to. A second dropdown will appear to choose the stage of that pipeline contacts will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



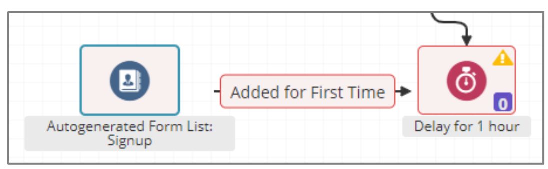


pipeline stage to this element, an icon will appear on the bottom left corner of the element in your campaign to indicate that contacts will move through a pipeline stage at this point in your campaign.

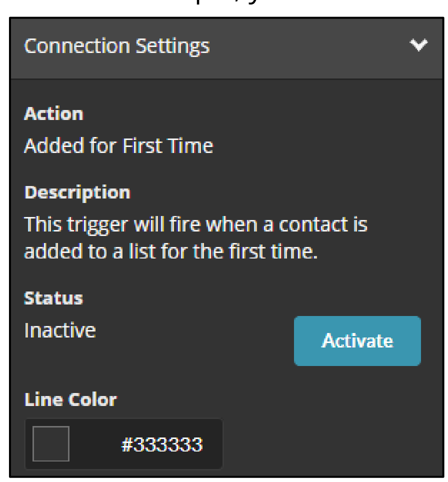
[**Note:** If a pipeline stage is used with a Starting Point element and a contact enters the campaign who is already in a greater stage of the pipeline that the element is set to, the contact will not regress to that stage in the pipeline. Their stage will remain unchanged until they reach a higher set pipeline stage in the campaign. Contacts will only progress through a pipeline if they are currently in a lower stage of the associated pipeline (or not in the pipeline to begin with). In the event a pipeline stage is associated with a Campaign element, when a contact reaches this element, they will only continue if their current pipeline stage is lower than that set to the pipeline or unset. If their current stage in the associated pipeline is higher than that set by the element, the contact's progress in the campaign is halted.]



- 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.]



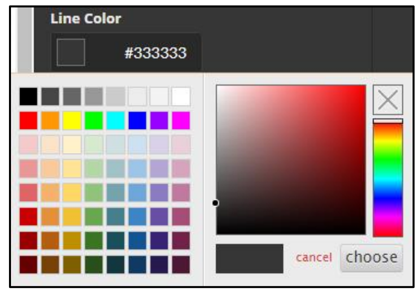
- Once a connection has been established between the Contact List element and at least one other element, a textbox with the connection type will appear on the line. Click on this textbox to open a new Connection Settings section.
- The first field is the Action field, which indicates the connection type (Added for First Time).

- The second field is the Description field which will give a description of the condition under which the action will occur.
- 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.

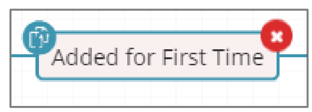
[**Note:** Keep in mind the connection will not become active until you save the campaign.]

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

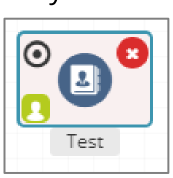
To choose a color:

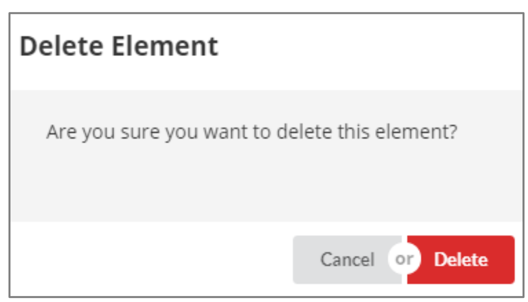


> Click on the color square in the field and a color selector will appear or enter the hex code of the color in the field next to the square.
> Choose your desired color from the pre-set swatches on the left side of the selector dropdown or use the right side to manually choose a color.
> Click the Choose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



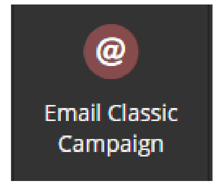


[**Note:** You will only receive the confirmation pop-up if the element has been activated or if the campaign has been saved.]

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.

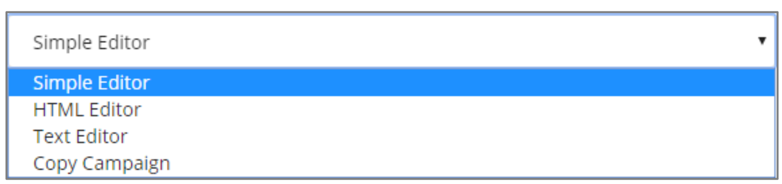
Email Classic Campaign



The only drag-and-drop element in the Classic 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:

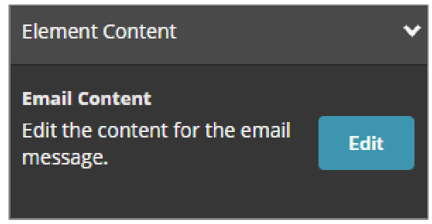
- Click and drag the Email element or double click to add it to your canvas.
- When you place the element, a sidebar will appear with two fields. The first field will ask you to choose the type of email to create from the dropdown menu in the Type field:
  - > **Simple Editor:** An email campaign created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



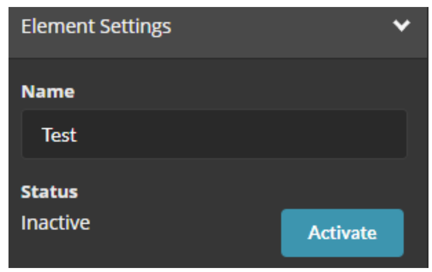
  - > **Copy Campaign:** An email campaign created by copying an existing project. Choosing this option will create another field in the pop-up window where you must select the existing email campaign you would like to copy from the dropdown list.
- The second field will ask you to enter a name for the 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 Close button to close the sidebar without adding an Email Classic element.

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



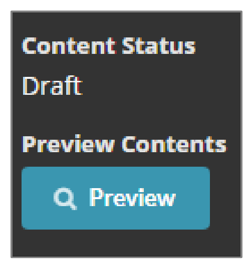
> **Email Content:** Clicking the blue Edit button in the Element Content section will bring you to the Email application, where you can design, create, and edit the content and settings of the email. Refer to the *SimplyCast Email User Guide* for more information about creating and editing email campaigns.



> **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.

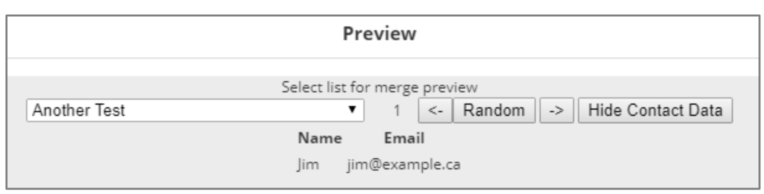
> **Status:** This field is where you can activate or deactivate the element by clicking the blue or red button respectively. Activating an element means that the element will be able to be used as part of the campaign and should perform as expected.

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



> **Content Status:** Once you have saved the Autoresponder 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, Prepared, etc.).

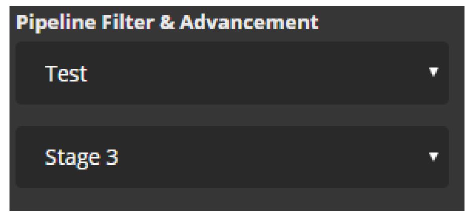
> **Preview:** Once you have saved the Autoresponder campaign after adding the Email element, you will be able to preview the content of the email by clicking the blue Preview button appearing in this field. A sidebar will open where you are able to view the email content (if any has been added) as well 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 Autoresponder campaign.

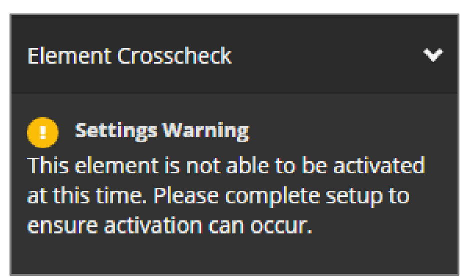
> **Subject Line:** Once you have finished the email campaign setup, the Subject Line field will appear in the Settings Panel below the blue Preview Contents button, containing the subject line you have included in the email setup.

> **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.



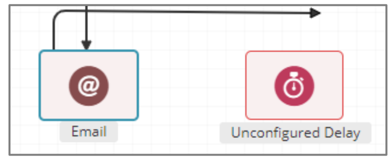
[**Note:** If a pipeline stage is used with a Starting Point element and a contact enters the campaign who is already in a greater stage of the pipeline that the element is set to, the contact will not regress to that stage in the pipeline. Their stage will remain unchanged until they reach a higher set pipeline stage in the campaign. Contacts will only progress through a pipeline if they are currently in a lower stage of the associated pipeline (or not in the pipeline to begin with). In the event a pipeline stage is associated with a Campaign element, when a contact reaches this element, they will only continue if their current pipeline stage is lower than that set to the pipeline or unset. If their current stage in the associated pipeline is higher than that set by the element, the contact's progress in the campaign is halted.]

- 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



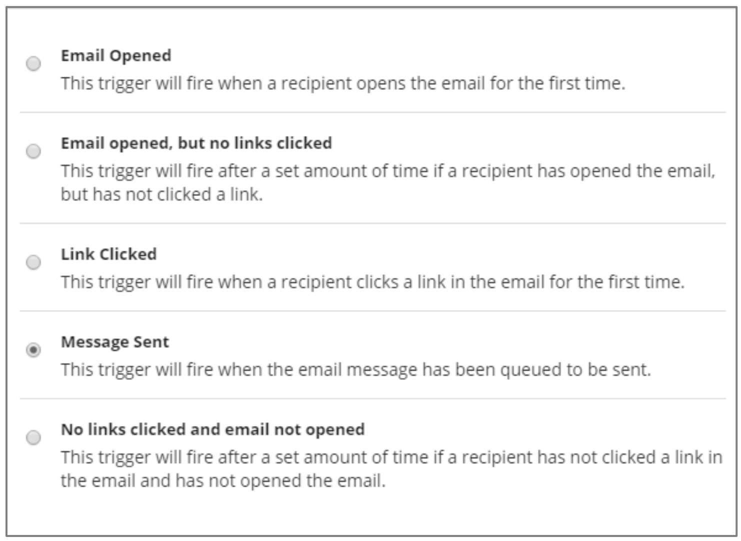
Element Crosscheck section will describe the issue with the element and provide instructions on how to resolve it.

- 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.]

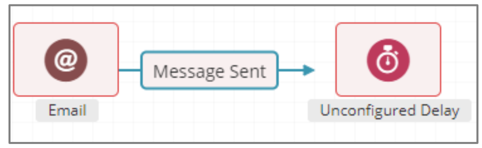
- A sidebar will appear where you can choose between five connection types:



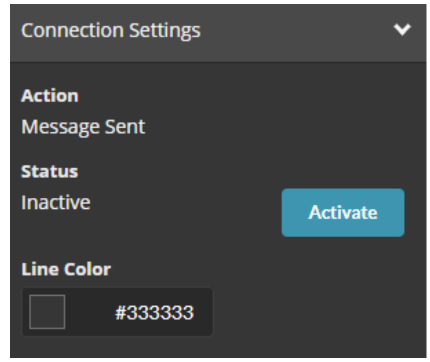
  > **Email Opened:** This means the campaign will continue through the connection when a recipient opens the email for the first time.
  > **Email Opened, But No Links Clicked:** This means the campaign will continue through the connection after a set amount of time if a recipient has opened the email 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 Classic element and at least one other element, a textbox with the connection type will appear on the line.

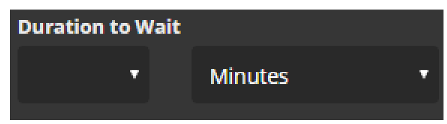


- Click on this textbox to open a new Connection Settings section in the Settings Panel.
- Depending on the connection option you choose, there are will be either four or five fields in the Connection Settings section. The first field is the Action field, which indicates the connection type selected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

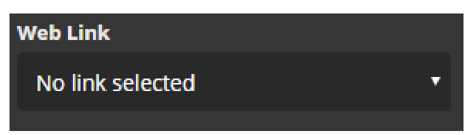


- The second field is the Description field which will give a description of the condition under which the action will occur.
- The third field is the Status field where you can activate or deactivate the connection by clicking the blue or red button respectively. Activating a connection means that the 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.]

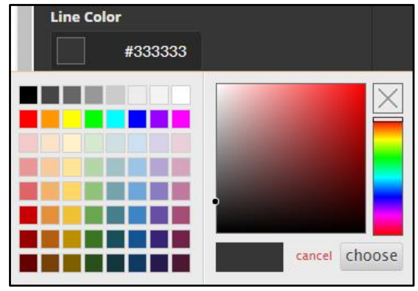


- If you chose the “Email Opened, But No Links Clicked” or “No Links Clicked and Email Not Opened” option, the next field will be Duration to Wait. This is where you decide how long the system will wait for the email recipient to either open the email or click the link before triggering the connection. 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.



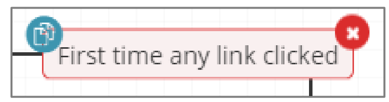
- If you chose the “Link Clicked” option, the next field will be Web Link. This is where you will select the link the recipient must click in order to fire the trigger. Only the links present in the current email will be available to choose from. Select the link to connect with this trigger from the 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:

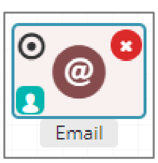


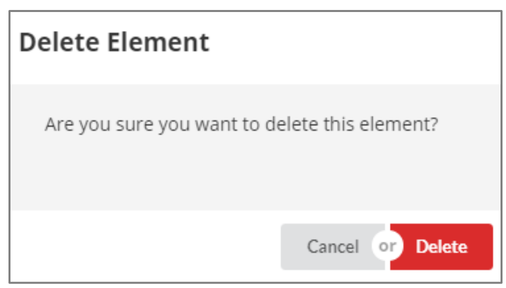
- > Click on the color square in the field and a color selector will appear or enter the hex code of the color in the field next to the square.
- > Choose your desired color from the pre-set swatches on the left side of the selector dropdown or use the right side to manually choose a color.
- > Click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

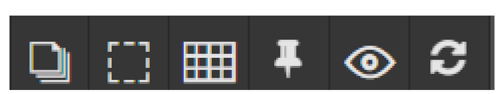




[**Note:** You will only receive the confirmation pop-up if the element has been activated or if the campaign has been saved.]

Canvas Settings Bar and Widgets

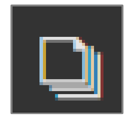
Above the canvas is the Canvas Settings Bar, containing eight Widgets. Widgets are tools other than elements that you can use to help build your campaign and make it more user-friendly.



These Widgets are:

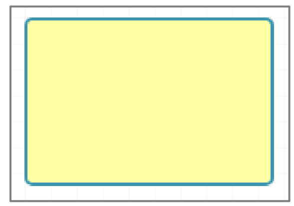
- Create a New Note on the Canvas
- Create a New Section on the Canvas
- Show or Hide the Canvas Grid
- Snap Elements to the Grid
- Show Interactions on the Canvas
- Refresh the Interaction Information
- Undo Last Action
- Redo Next Action

Create a New Note on the Canvas

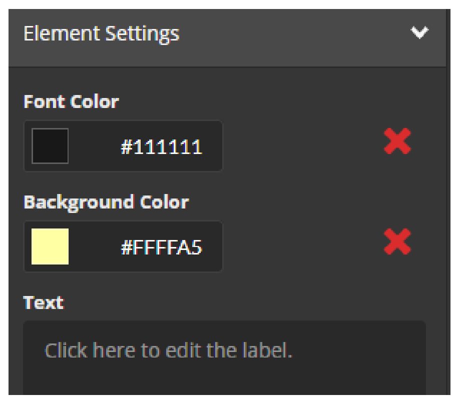


Especially for larger and more intricate campaigns, it helps to be able to add notes to the various stages of the campaign to maintain organization.

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.



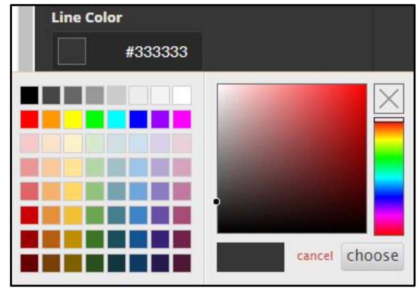
- Once you click or drag and drop the icon, a new note will appear on the canvas as a yellow textbox. You can move the note around on the canvas by dragging and dropping it with your mouse. When you have the note selected with your mouse, three additional fields will appear in the Element Settings section 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.

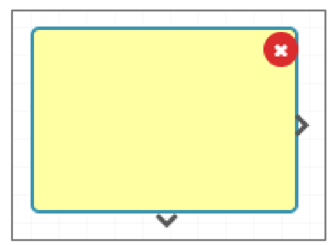
To choose a color:



> 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.

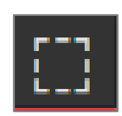
To do this:



> 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.

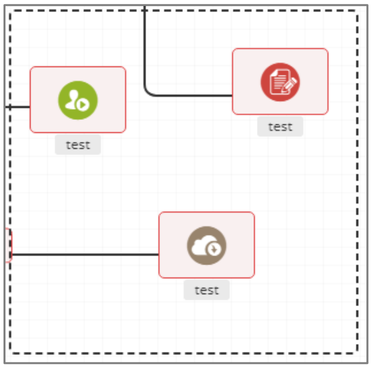
Create a New Section on the Canvas



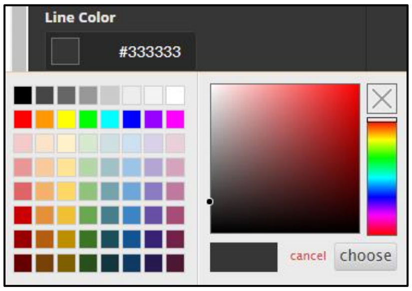
For larger and more complex campaigns, it helps to have a way to keep them organized. You can use the sectioning tool to group specific elements into sections for easy management.

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.

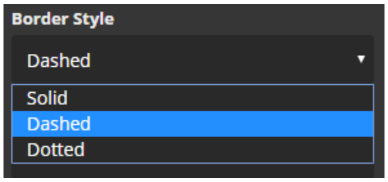


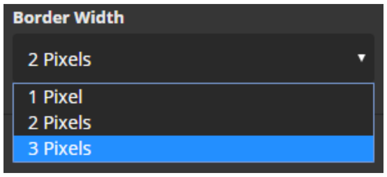
- Either click the Sections icon or drag and drop it onto the canvas to create a new section, indicated in the canvas by a box made of dashed lines. You can move the section around on the canvas by dragging and dropping it with your mouse.
- When you select the section by clicking the border of the box, 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:

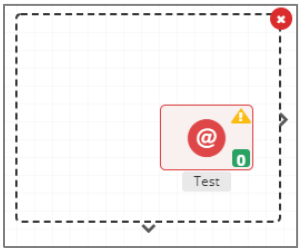
> Click on the color square in the field and a color selector will appear or enter the hex code of the color in the field next to the square.
> Choose your desired color from the pre-set swatches on the left side of the selector dropdown or use the right side to manually choose a color.
> Click the Choose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

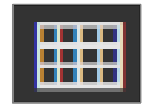
To do this:



> 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.

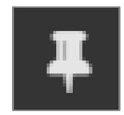
- To delete the section, hover your mouse over the note and click the red “x” icon in the top right corner of the section.

Show or Hide the Canvas Grid



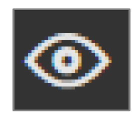
By default, the canvas is gridded. To hide the canvas grid, locate the Canvas Grid icon in the Widgets bar above the canvas. Click the Canvas Grid icon once to hide the Canvas Grid. If the canvas grid is hidden, click the Canvas Grid icon again to make the canvas grid re-appear.

Snap Elements to the Grid



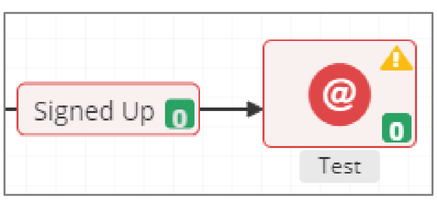
When moving elements around the canvas, you can choose for the elements to snap in line with the gridded lines or to be placed freely on the canvas. When the icon background is dark, elements will snap to the grid. When it is lighter, elements will not snap to the grid. To change these settings, click 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.

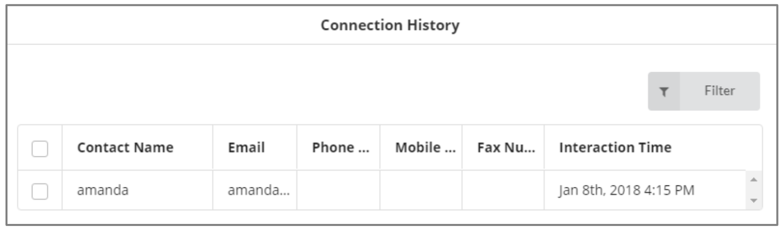
Once the setting is activated, you will see a number at the bottom right of most elements and connections in the campaign. This number indicates the number of contacts who have reached each point in the campaign.



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 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.

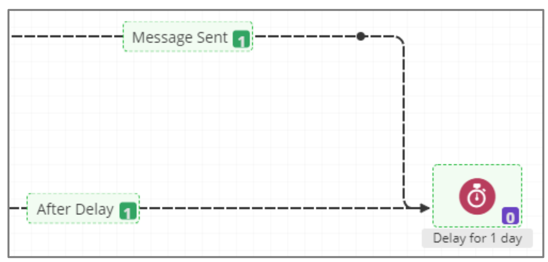
If you click the number on an active connection, a Connection History sidebar will appear where you can see a full list of contacts and their interaction with that connection. By default, the Connection History sidebar contains a table with the following pieces of information:



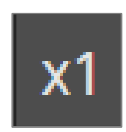
- **Contact Name:** The name of the contact
- **Email:** The contact's email address
- **Phone Number:** The contact's phone number
- **Mobile Number:** The contact's mobile phone number
- **Fax Number:** The contact's fax number
- **Interaction Time:** The date and time the contact interacted with that connection

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.



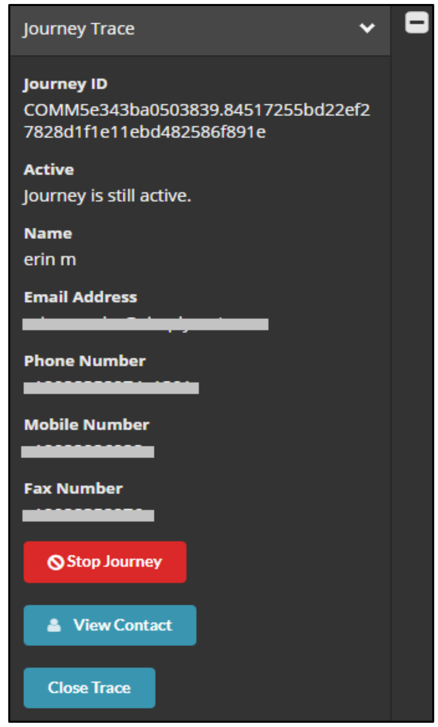
Furthermore, an animated dot will move along the line and through the elements to represent the journey. You can change the speed of the dot's movement from the navigation bar. To the right of the Refresh Interaction Information widget, you will see an additional widget where you can adjust the journey 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:

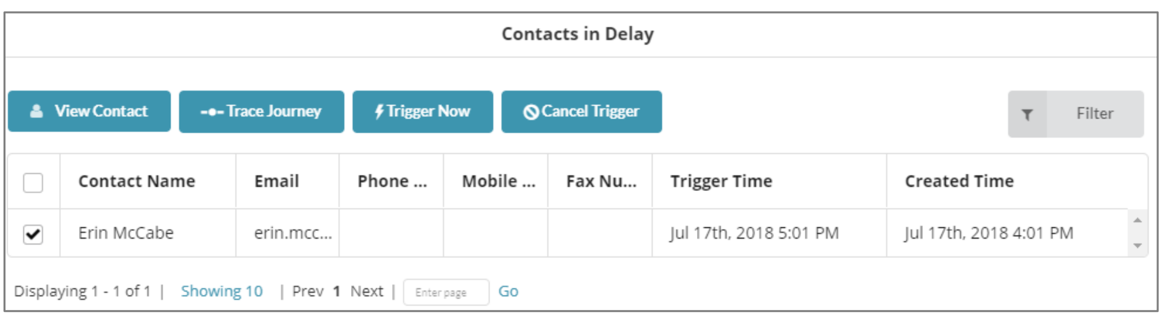
- **Journey ID:** The unique ID given to each journey
- **Active:** Indicates whether or not the journey is still active.
- **Name:** The contact's name

- **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
- **Stop Journey:** Click this button to stop the contact from progressing further in the campaign. When the button is clicked, a pop-up window will appear asking you to confirm. Click OK to stop the contact's journey or Cancel to close the pop-up window.
- **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.



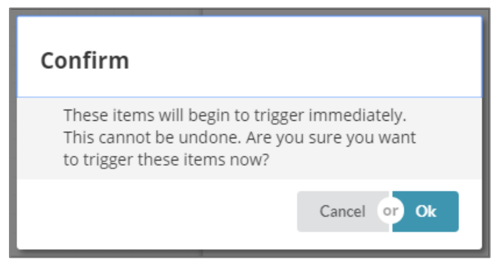
The table will contain the following information:

- **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

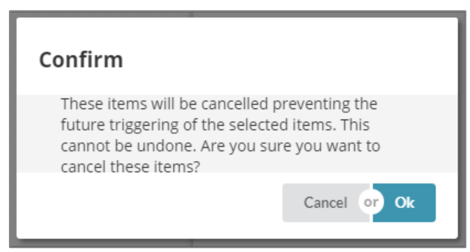
- **Trigger Time:** The date and time the contact will be triggered to progress to the next stage in the 360 campaign
- **Created Time:** The date and time the contact arrived at the delay element

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.

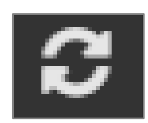
The other two buttons appearing when checking off one or more contacts in the table are the Trigger Now and Cancel Trigger buttons.



- 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.

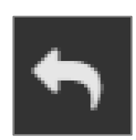


Refresh the Interaction Information



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.

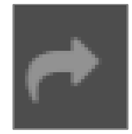
Undo Last Action



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.]

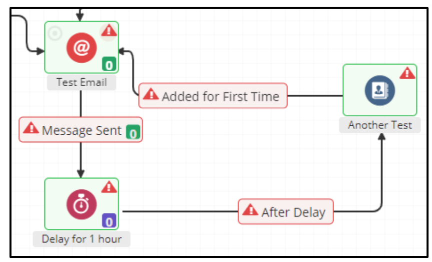
Redo Next Action



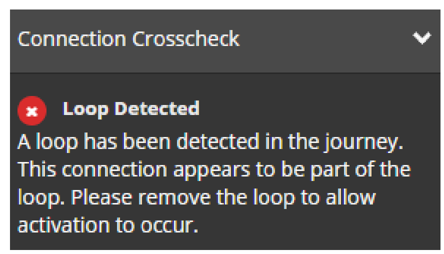
If you chose to undo an action, you are able to redo the action by clicking the Redo button beside the Undo button. Keep in mind once you save the campaign, you cannot redo actions that were undone prior to saving.

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

Loop Detection



The Autoresponder 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.

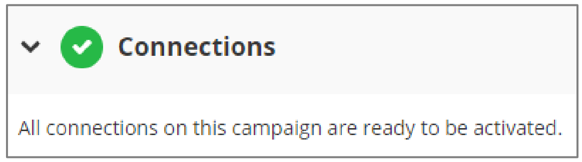
When you have finished configuring your Autoresponder campaign, click the green Save button at the bottom right corner of the screen to save your progress. Then, click the Next button to proceed to the Crosscheck page.

Crosscheck

The Crosscheck page helps you make sure that all items in the Autoresponder campaign are able to be activated before the activation of the full campaign.

The Crosscheck page is divided into up to three sections:

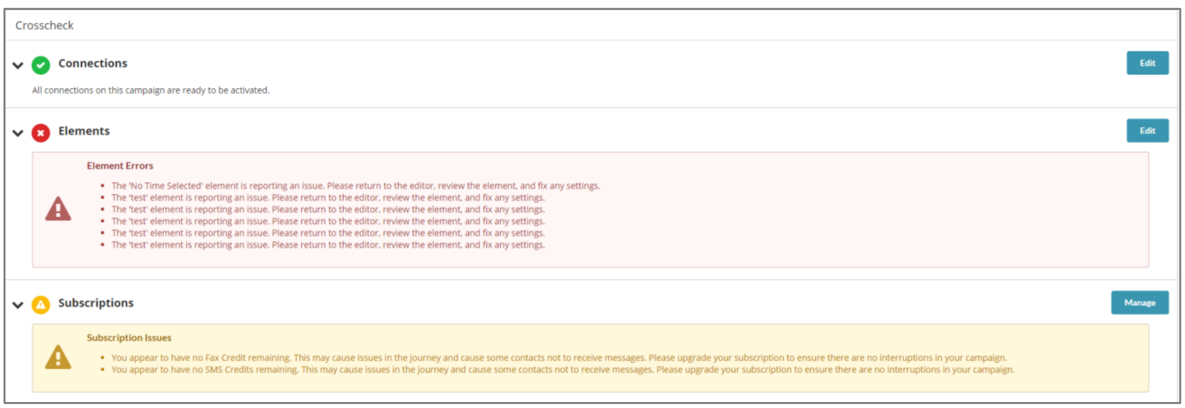
Connections



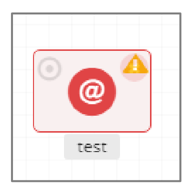
The Connections section informs you of any issues with connections between any elements in your campaign. If there are no issues, you will see a green checkmark icon and a message that all connections are ready to be activated.

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.

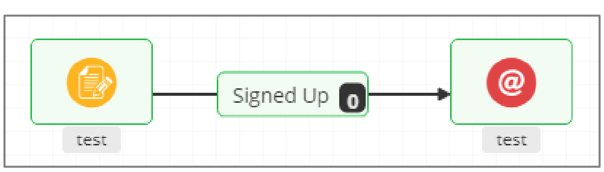
If there are issues that must be resolved in order to activate the campaign, there will be a red "X" icon and a description of the issue(s) found. The system will offer instructions on how to resolve the issue and the blue Edit button will redirect you to the appropriate page in the editor to make these changes.



Elements



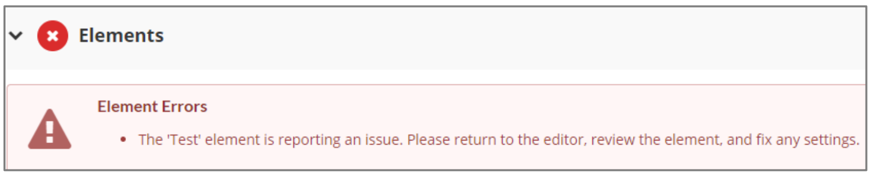
The Elements section informs you of any issues with the elements in your campaign. If there are no issues, you will see a green checkmark icon and a message that all elements are ready to be activated.



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.

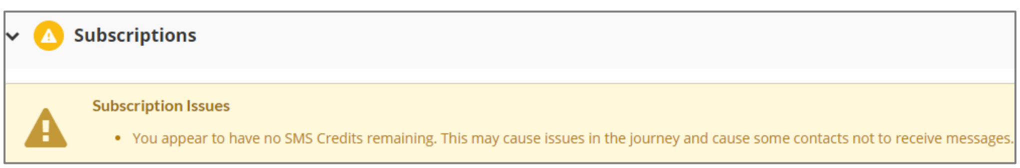
If there are issues that must be resolved in order to activate the campaign, you will see a red “X” icon and a description of the issue(s) found. The system will offer instructions on how to resolve the issue and a blue Edit button that will redirect you back to the canvas to make the appropriate changes. When you return to the canvas, any elements with errors will be red, while ones without errors will be green.



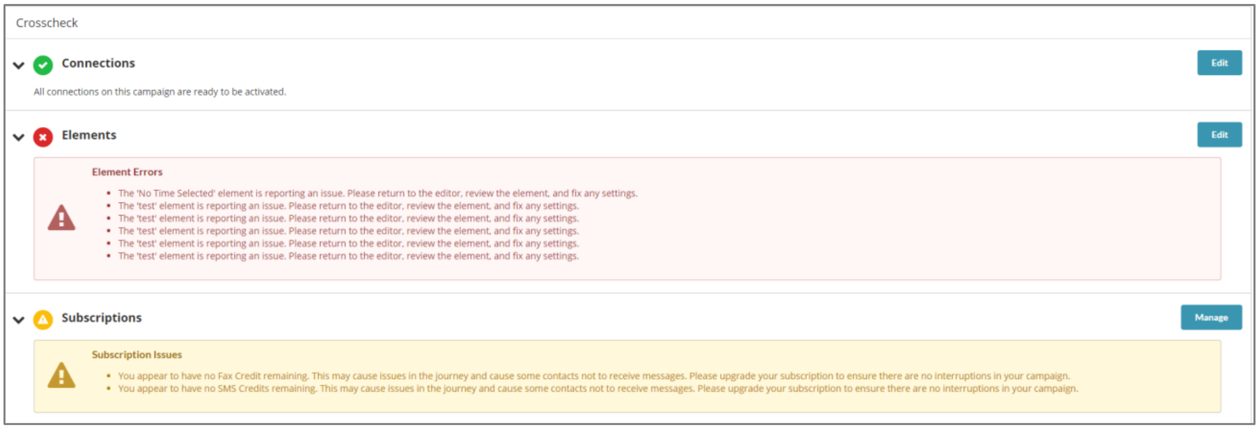
Subscriptions

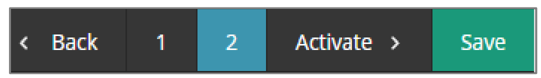
The Subscriptions section informs you of any issues with your account subscription, such as a lack of credits. If there are no issues, you will see a green checkmark icon and a message that all connections are ready to be activated.

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.





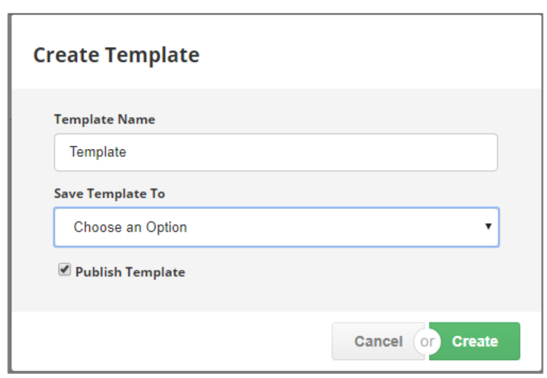
Once you have finished looking over the crosscheck page and all components of your campaign are ready to be activated, click the black Activate button on the bottom right corner of the screen to activate your campaign. You will be redirected to the Autoresponder Dashboard where you will see the new Autoresponder campaign has been activated.

Templates

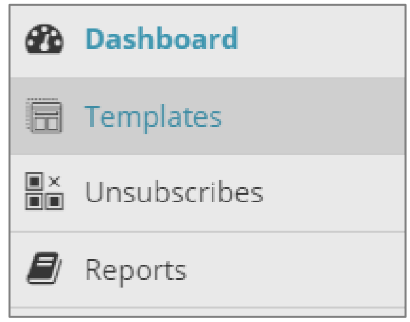
Templates are copies of existing Autoresponder campaigns, with all the elements and connections intact. You can use templates as a base to create similar campaigns in the future without needing to build it from scratch.

To create a template from an existing Autoresponder 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 Autoresponder 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 immediately 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.

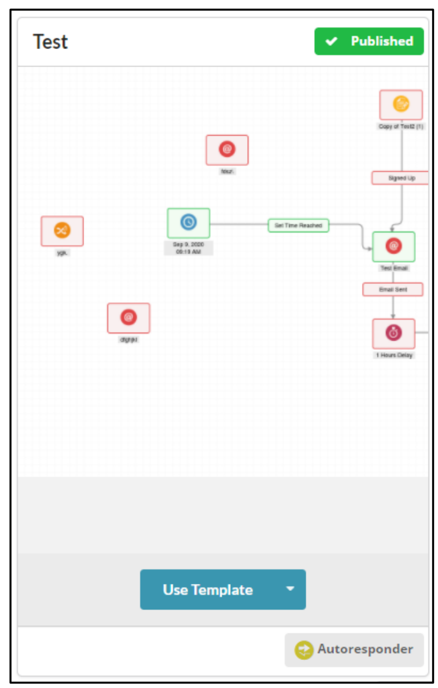


You are also able to enter the Template Management section from the main Autoresponder Dashboard by clicking the Templates option from the menu on the left side of the screen. Clicking on this tab will bring you to a page where you are able to view, edit, copy, publish, unpublish, and delete templates 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 green Create Campaign From Template button next to the green Create Empty Campaign button.]

In the Templates section, you are able to:

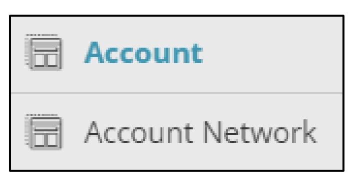
View a List of Templates



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 (Autoresponder, Email, or SimplyCast 360)

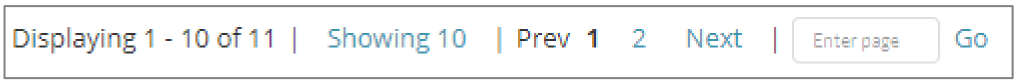


In the menu on the left side of the screen you will see two template visibility options: Account and Account Network. The Account option refers to any templates that you have made yourself or other users in your specific SimplyCast account have published. The Account Network option lets you view the 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.

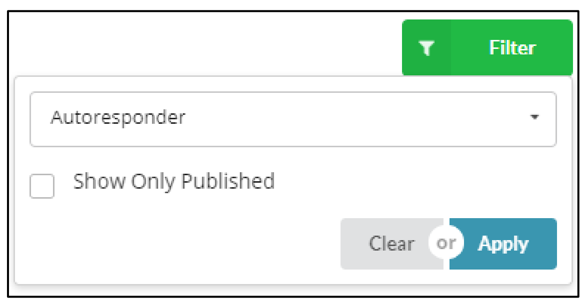


Filter Templates

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 Autoresponder, Email, and SimplyCast 360.

[**Note:** For example, since you entered the Templates page from the Autoresponder channel, the templates will be automatically filtered to show only templates for the Autoresponder 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 Autoresponder campaigns, SimplyCast 360 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

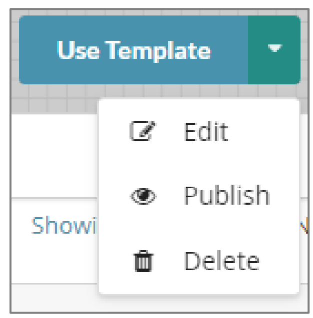
If you are looking for a particular template, you can search through the templates in the list.

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.

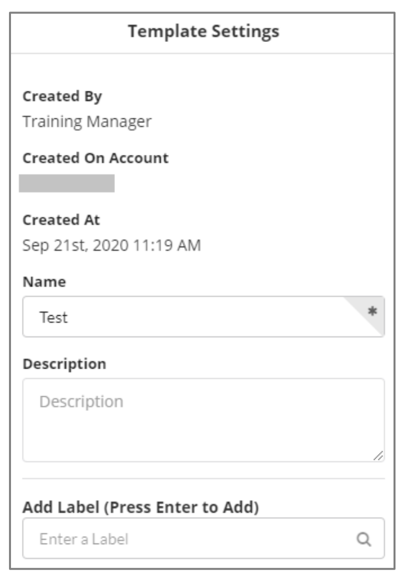
Edit Templates

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.

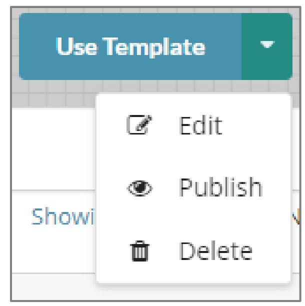
> **Add Label**: Add a label to the template by typing it into the textbox provided and pressing Enter. You can add multiple labels to each template.

- 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.

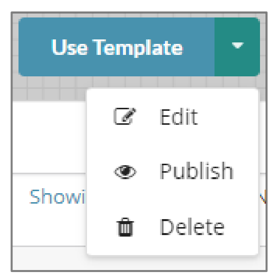
To publish or unpublish a template from the Account Templates page:



- 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.

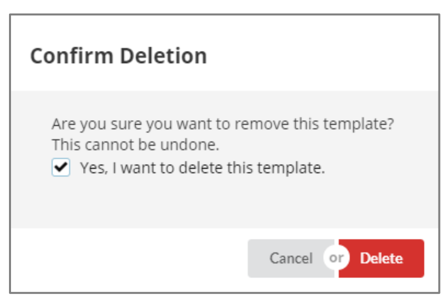
[**Note:** You can still make new edits to published templates.]

Delete Templates



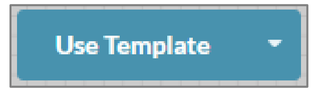
To delete a template:

- 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.

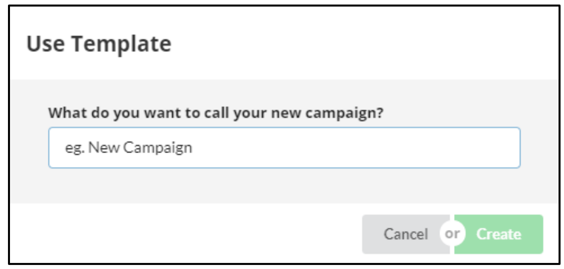


Create an Autoresponder Campaign Using a Template

You are able to create new Autoresponder campaigns using any of your saved templates. There are two possible ways you can do this.



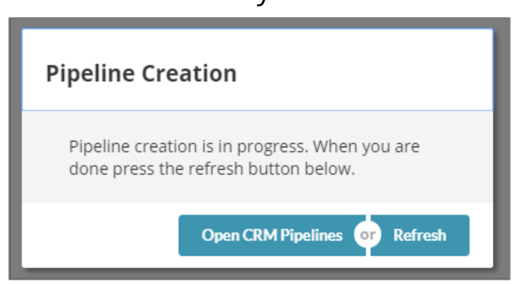
In the Templates section of Autoresponder:



- 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.

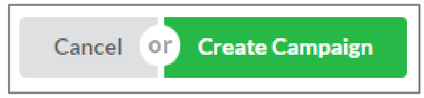
[**Note:** The Templates section is not where you can view and use pre-created templates that have been pushed from SimplyCast. Pre-created templates known as Common Templates can be viewed by selecting green Create Campaign From Template button next to the green Create Empty Campaign button. Refer to the next creation method for more information.]

- A pop-up window will appear where you must name your new Autoresponder 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.

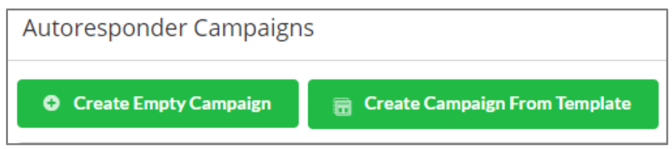
[**Note:** If you are creating a campaign and do not need to create a new resource, you will not have to complete this step.]



- 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 Autoresponder dashboard:

- Click the green Create Campaign From Template button next to the green Create Empty Campaign button 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

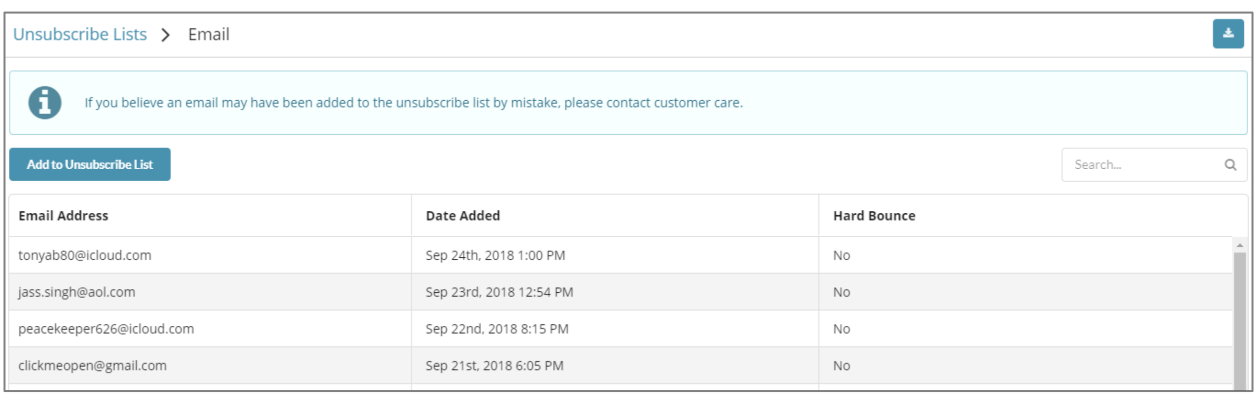
The third tab in the left-hand menu in the Autoresponder dashboard is the Unsubscribes tab. This is where you are able to view the unsubscribe lists for each of the four primary communication channels in the SimplyCast platform: email, SMS, voice, and fax.

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 three 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:** Whether the email address hard bounced

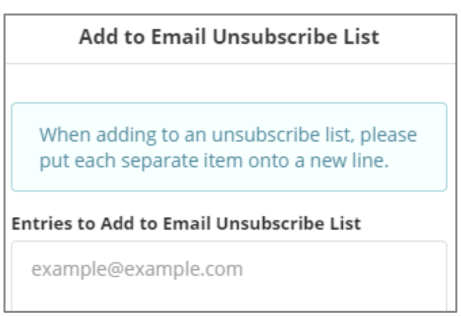
To view an email address that does not appear on the first page of the unsubscribe list, navigate to the bottom of your screen where you will find the page numbers. Proceed to another page of email addresses by clicking the page number you would like to visit. The Next button will take you to the next 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.

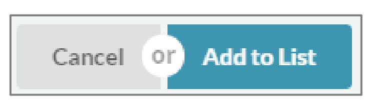
To manually add contacts to the email unsubscribe list:

- 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.

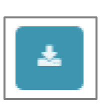
- Once you have entered all the email addresses to unsubscribe, click the blue Add to List button located below the textbox. Or, click Cancel to close the sidebar without adding any contacts to the unsubscribe list.



[**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.]

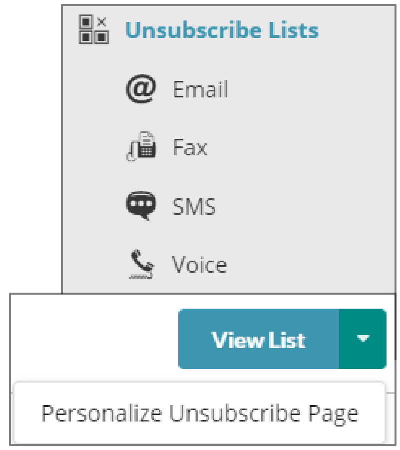


To download the unsubscribe list, click the blue download button



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.

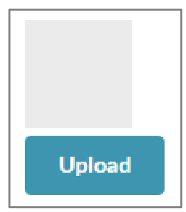
Personalize Email Unsubscribe Page

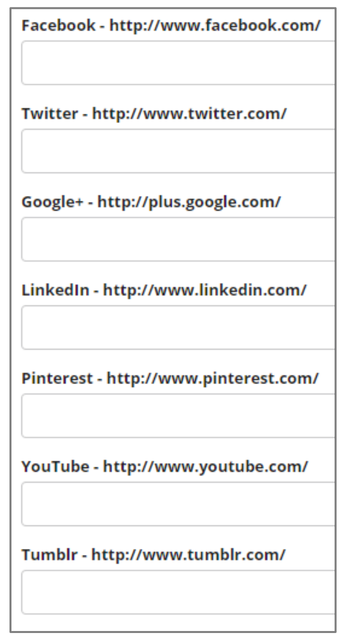


You can personalize what users see when they enter the email unsubscribe page while unsubscribing to your email messages.

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.

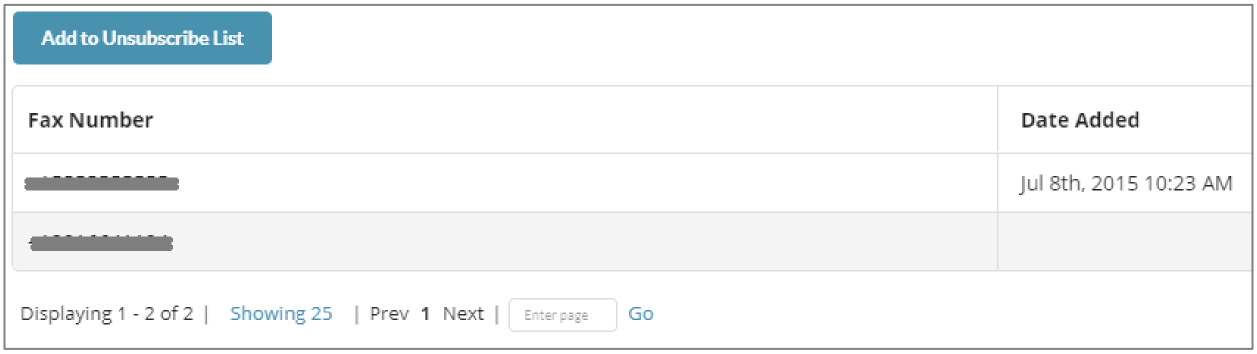
  > **Social Media:** You can add the links to your social media sites on the Email Unsubscribe Page so users can still follow you on these sites even if they choose to unsubscribe from your email communications. Enter the URLs for your desired social media sites in their respective fields. You can add 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.



[**Note:** You may not contact anyone in the unsubscribe list per SimplyCast's Terms and Conditions.]

In the Unsubscribe List, there are two fields:

- **Fax Number:** The fax number added to the unsubscribe list.
- **Date Added:** The date and time the fax number was added to the unsubscribe list.

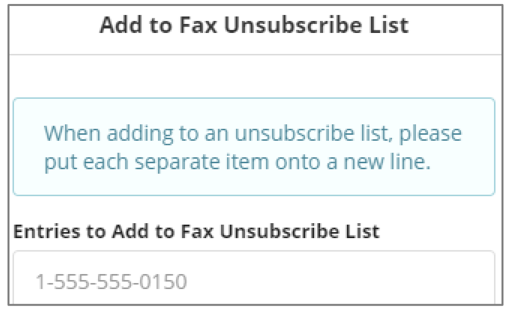
To view a fax number that does not appear on the first page of the unsubscribe list, navigate to the bottom of your screen where you will find the page numbers. Proceed to another page of fax numbers by clicking the page number you would like to visit. The Next button will take you to the next page of 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.



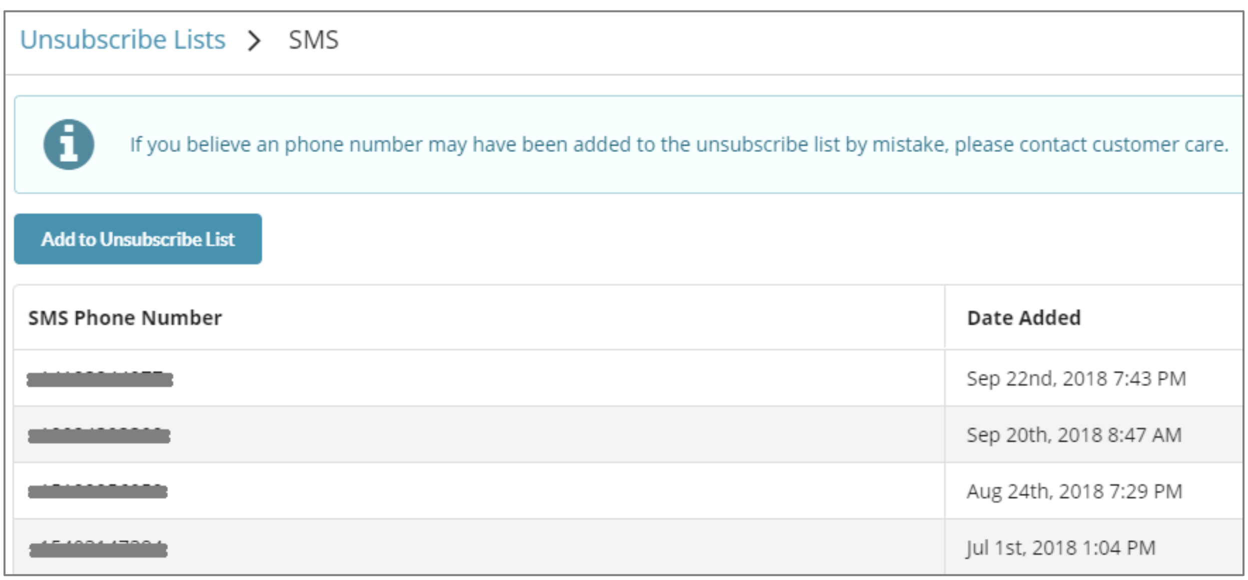
Once you have entered all the numbers to unsubscribe, click the blue Add to List button located below the textbox. Or, click Cancel to close the sidebar without adding any contacts to the unsubscribe list.

[**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:

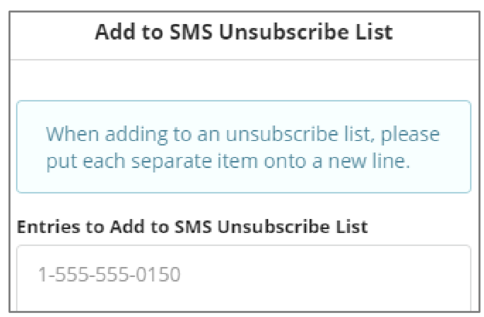
- **SMS Phone Number:** The SMS number added to the unsubscribe list.
- **Date Added:** The date and time the SMS number was added to the unsubscribe list.

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:

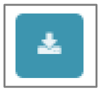
- Click the blue Add to Unsubscribe List button above the SMS unsubscribe list.
- In the sidebar on the right side of the screen, type each SMS number that you would like to manually unsubscribe in the textbox provided. Each new number must be entered on a new line.



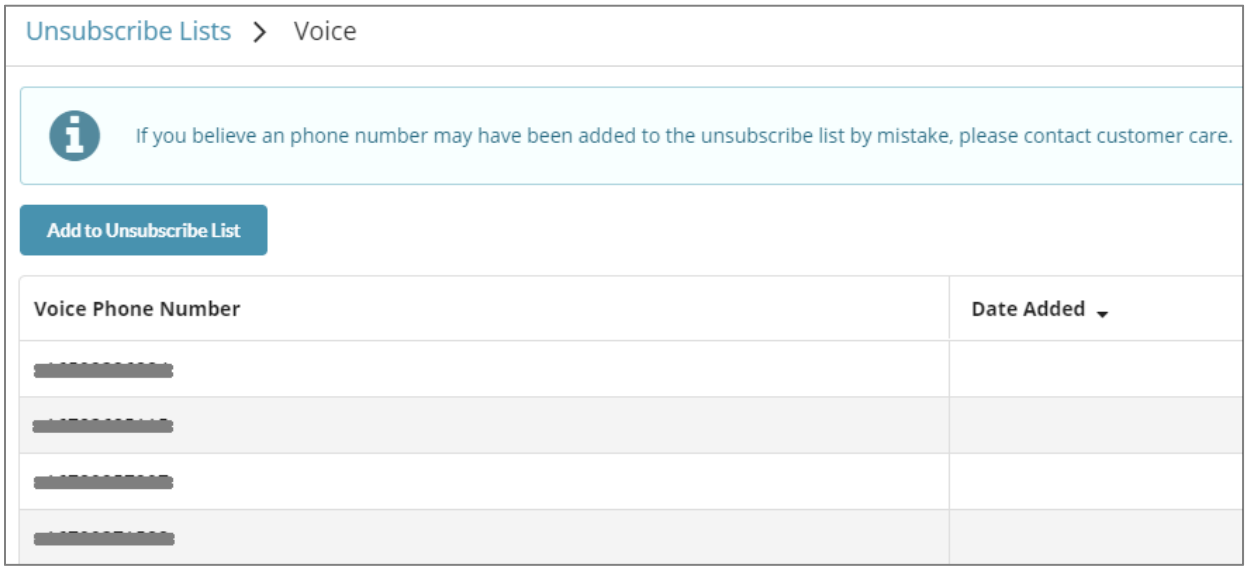
Once you have entered all the numbers to unsubscribe, click the blue Add to List button located below the textbox. Or, click Cancel to close the sidebar without adding any contacts to the unsubscribe list.

[**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



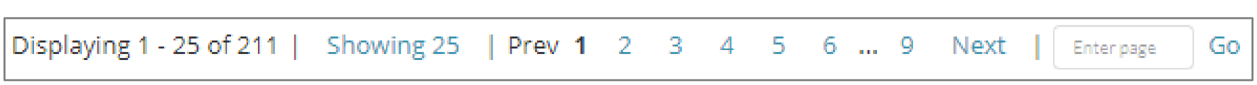
Selecting the blue View List button next to Voice on the Unsubscribes page will direct you to the Voice Unsubscribe List. Here you can view and download the unsubscribe list as well as manually add phone numbers to this list.

[**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.
- **Date Added:** The date and time the phone number was added to the unsubscribe list.

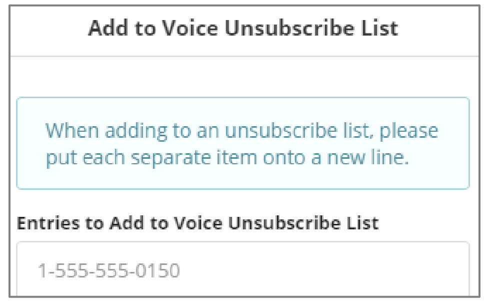
To view a phone number that does not appear on the first page of the unsubscribe list, navigate to the bottom of your screen where you will find the page numbers. Proceed to another page of phone numbers by clicking the page number you would like to visit. The Next button will take you to the next page 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:

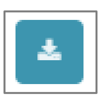
- Click the blue Add to Unsubscribe List button above the Voice unsubscribe list.
- In the sidebar on the right side of the screen, type each phone number that you would like to manually unsubscribe in the textbox provided. Each new number must be entered on a new line.



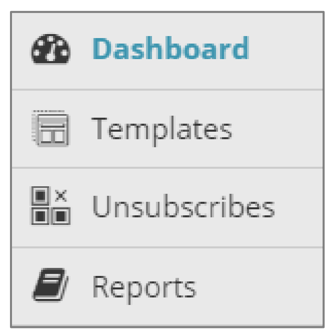
Once you have entered all the numbers to unsubscribe, click the blue Add to List button located below the textbox. Or, click Cancel to close the sidebar without adding any contacts to the unsubscribe list.

[**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 Autoresponder campaigns, you must navigate to the SimplyCast Reporting interface.

To do this:

- Go to the main Autoresponder dashboard.
- Click the Reports option from the menu on the left side of your screen.
- You will be directed to the Autoresponder Reporting dashboard.

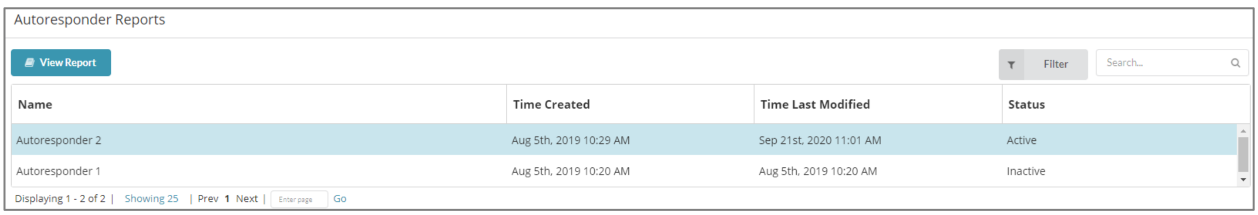
Once in the Autoresponder Reporting Dashboard, you are able to:

View the List of Reports

When you enter the Autoresponder Reports Dashboard, you should immediately see a list of all the Autoresponder 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 campaign when you created it
- **Time Created:** The date and time the campaign was created
- **Time Last Modified:** The date and time the campaign was last edited
- **Status:** Whether the campaign is currently active or inactive

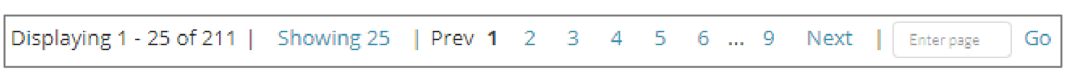


Navigate Multiple Pages of Reports

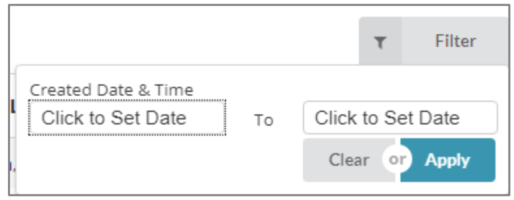
If you have created enough Autoresponder campaigns, they will be displayed on multiple pages in the Reports Dashboard.

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 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 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 Autoresponder 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 Autoresponder 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 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 Autoresponder report, use the search bar located at the top right of the screen above the list of all the reports in the main 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 Autoresponder 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 Autoresponder 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 Autoresponder campaign, you will see up to two 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 Autoresponder campaign, you will see all of them in the Email Classic Sends table.

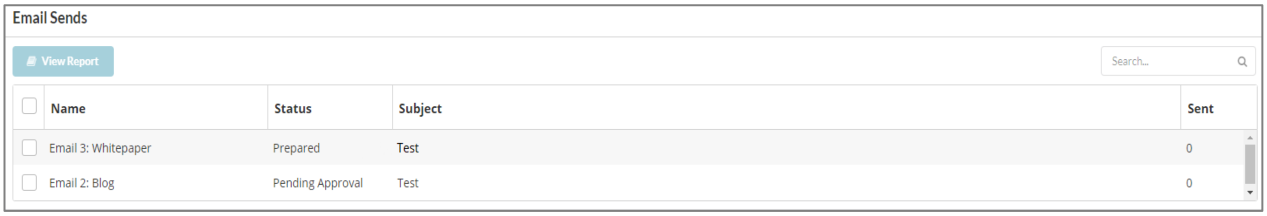
This table contains up to eight columns of information:

- **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.



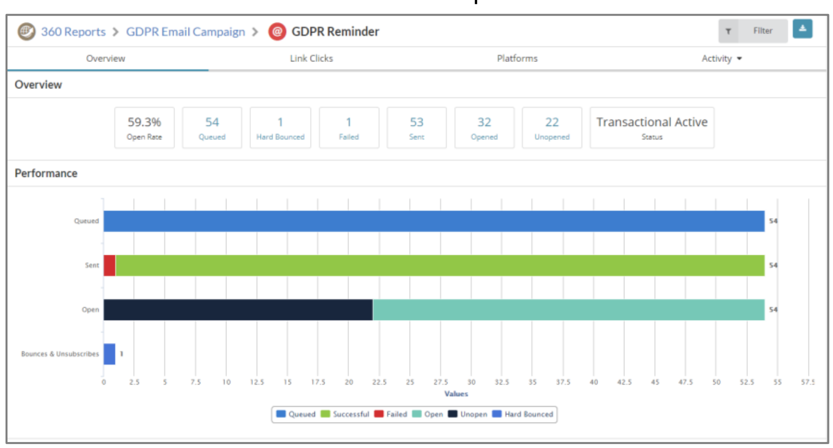
Name	Status	Subject	Sent
Email 3: Whitepaper	Prepared	Test	0
Email 2: Blog	Pending Approval	Test	0

Email Sends

If you have included any email elements in your Autoresponder campaign, you will see all of them in the Email Sends table.

This table contains four 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.



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 New Email Editor User Guide* for more information on email reporting.

Glossary

Campaign: Each specific communication project created within the Autoresponder application, also the entire Autoresponder 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 Autoresponder campaign at a designated time

Creation Panel: The section on the left side of the Autoresponder canvas and contains all the Autoresponder 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

Delay: A function that allows a user to pause a contact in the Autoresponder 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 Autoresponder campaign

Element Crosscheck: A settings section for a drag-and-drop element in an Autoresponder 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 Autoresponder 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 an Autoresponder campaign, displayed in the bottom right-hand corner of a drag-and-drop element

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 an Autoresponder 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 Autoresponder canvas. This is where you can view and edit all the settings for the Autoresponder 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

Status: The condition a campaign is in terms of the creation or sending process: such as active, aborted, complete, etc.

Template: A copy of an existing Autoresponder 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