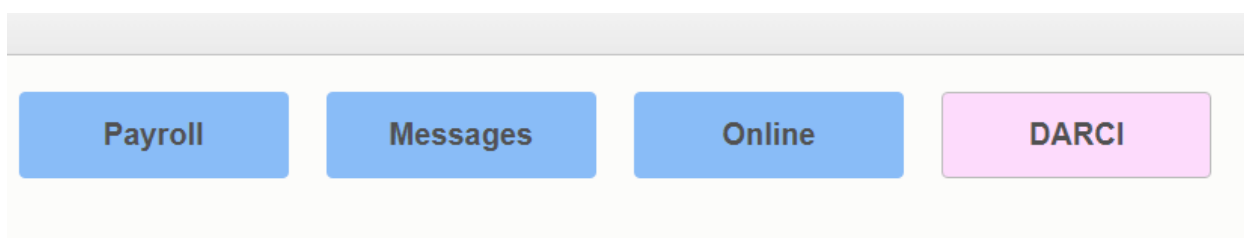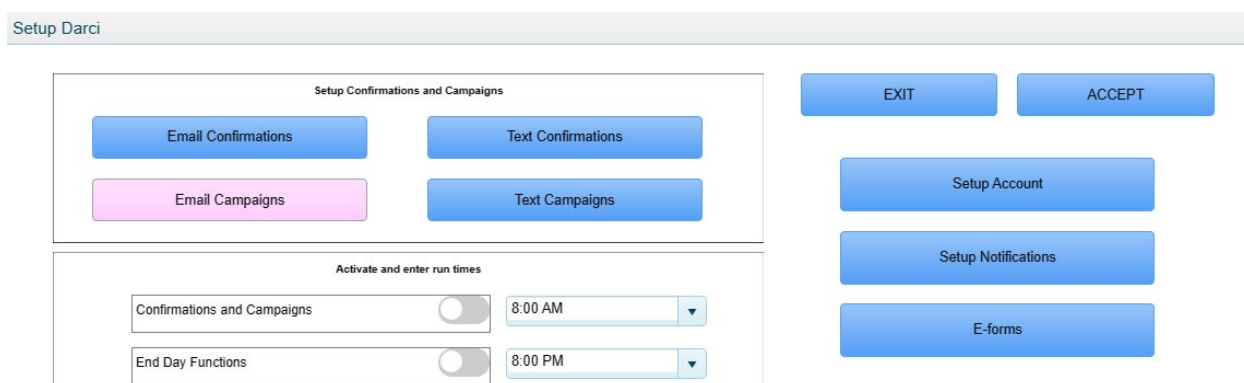# Birthday Email Campaign

In this tutorial we will cover creating an email campaign using the birthday template. These instructions also work for the anniversary template.

1. From the main screen, click DARCI

2. Click 'Email Campaigns'

3. (A) Select the 'Birthday' template from the drop down.

    (B) Make this template active by clicking the 'Active' box.

    (C) Select how many email messages you would like to send out. In this first example we will just choose 1 but we will come back to this at the end to explain what more than one would look like.

    (D) Choose how many days in advance of their birthday you would like this email to go out. In this example we will choose 7 which means your client will receive this email one week before their birthday.

    (E) Click the '1st Message' button to begin setting up your email message.

4. (A) Choose the font and size you would like for your message.

(B) These are the codes you can use to insert specific information into your message. For example, by typing "Happy Birthday <CF>!" into the subject line it will display the customer's first name automatically ie. "Happy Birthday Stephen!"

(C) Choose the font color (this is black by default)

(D) Choose the font's background color (this is white by default)

(E) Inserting a hyperlink allows you to enter a website's URL into the message but also have it display a different message than the URL (ie. Click Here to be taken to your businesses' website)

(F) The image button will allow you to insert the URL to a specific image and have it display in your message directly from the internet. If the image resides on your computer, you can simply drag and drop it into this screen and it will automatically display.

Set Message and Image

Birthday campaign. message number: 1

Save   Exit

Subject
Happy Birthday <CF>!

Send Test

A   Arial, Helvetica,...   ▼   3 (12pt)   ▼   B I U abc ≡ ≡ ≡ ≡   A ▼   ⬥ ▼   ⇔ 🖼   ⊞
                                                                    C   D   E   F

B   Enter <BUSINESS> to inset Business Name in the subject or body of the message.
     Enter <CF> to insert the Client's FIRST Name in the subject or body of the message.
     Enter <CL> to insert the Client's LAST Name in the subject or body of the message.
     Enter <BD> to insert the Birth Date in the subject or body of the message.
     Enter <AV> to insert the Anniversary Date in the subject or body of the message.

Attach Survey   ⬤

5. The Table Wizard allows you to customize the format of the message box from one square up to a 6x8 table. In this example we will use a 2x2 table.

Enter <BUSINESS> to inset Business Name in the subject or body of the message.
Enter <CF> to insert the Client's FIRST Name in the subject or body of the message.
Enter <CL> to insert the Client's LAST Name in the subject or body of the message.
Enter <BD> to insert the Birth Date in the subject or body of the message.
Enter <AV> to insert the Anniversary Date in the subject or body of the message.

6. You now have up to 4 different images/text boxes to use when making your campaign email.

7. In the example below, we have dragged two images that were on our computer into the "A" and "C" boxes and then typed corresponding messages into the "B" and "D" boxes.

8. You must first click 'Save' before sending yourself a test. If the test email looks great, you're good to go! Just Exit all the way out.

9. If you wish to send more than one message, you can change the 'Number of campaigns to run' to a number larger than 1. In this example, we've choses 2 and set the 1st Message to be sent 7 days before the client's birthday and the 2nd Message will be set to 0 which means it will go out on the day of their birthday. You must configure the 2nd Message in the same manner you did the first.

10. Please note that all campaigns go out at the same time each day as your appointment reminders. This is setup in the main DARCI screen.