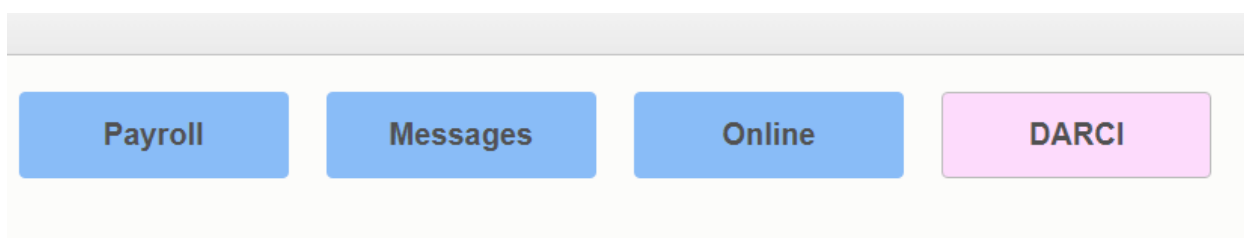


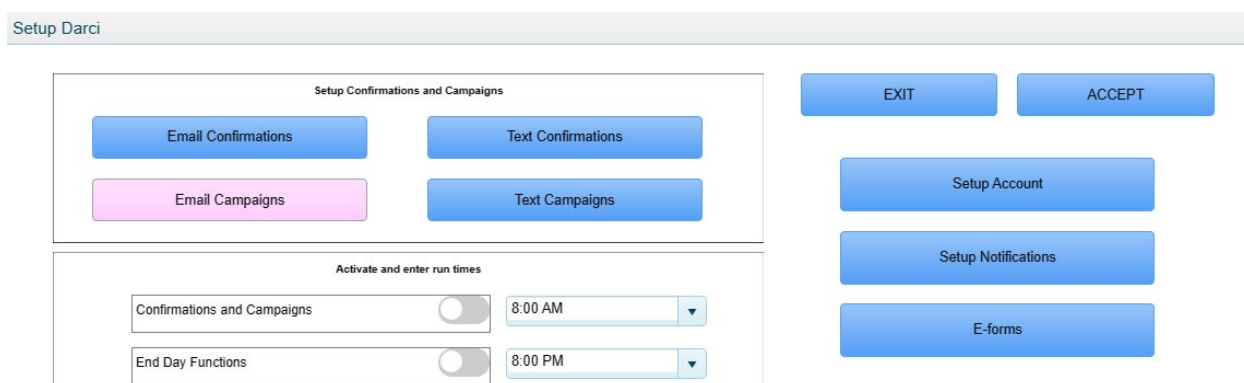
# Birthday Email Campaign

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 '1<sup>st</sup> Message' button to begin setting up your email message.

Blast Marketing Messages

Email Message

Template

Birthday

ACTIVE

Exit

Save Template

Number of campaigns to run

1

Days in Advance

7

1st Message

Messages will be sent out based on the number of Days in Advance. Select 0 to send the message out the day of the event.

The screenshot shows a web interface for setting up a marketing campaign. At the top, there's a header 'Blast Marketing Messages'. Below it, the 'Email Message' section contains a 'Template' dropdown menu with 'Birthday' selected, an 'ACTIVE' toggle switch that is turned on, and two buttons: 'Exit' and 'Save Template'. The 'Number of campaigns to run' section has a dropdown menu with '1' selected. The 'Days in Advance' section has a dropdown menu with '7' selected. A '1st Message' button is located below the 'Number of campaigns to run' dropdown. Red arrows and letters A through E point to these specific elements: A points to the 'Birthday' dropdown, B points to the 'ACTIVE' toggle, C points to the '1' dropdown, D points to the '7' dropdown, and E points to the '1st Message' button.

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

Subject  
Happy Birthday <CF>!

**A**

**B** Enter <BUSINESS> to insert 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.

Set Message and Image

Birthday campaign. message number: 1

Subject  
Happy Birthday <CF>!

Save Exit

Send Test

Arial, Helvetica, ... 3 (12pt) B I U abc [text alignment icons] [font color icon] [background color icon] [table icon]

Create a 2 x 2 table  
Table Wizard

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

Set Message and Image

Birthday campaign. message number: 1

Subject  
Happy Birthday <CF>!

Save Exit

Send Test

Arial, Helvetica, ... 3 (12pt) B I U abc [text alignment icons] [font color icon] [background color icon] [table icon]

A	B	C	D
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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.

Set Message and Image

Birthday campaign, message number: 1



Save Exit

Subject

Happy Birthday <CF>!

Send Test

Arial, Helvetica, ... 3 (12pt) B I U abc



**Spa Services**  
Come in any time during your birthday month and receive a complimentary add on treatment with the purchase of any regular spa treatment

**Salon Services**  
Come in and receive a free blowout any day during the week of your birthday!

Attach Survey

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

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.

Set Message and Image

Birthday campaign, message number: 1



Save Exit

Subject

Happy Birthday <CF>!

Send Test

Arial, Helvetica, ... 3 (12pt) B I U abc



**Spa Services**  
Come in any time during your birthday month and receive a complimentary add on treatment with the purchase of any regular spa treatment

**Salon Services**  
Come in and receive a free blowout any day during the week of your birthday!

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 chosen 2 and set the 1<sup>st</sup> Message to be sent 7 days before the client's birthday and the 2<sup>nd</sup> Message will be set to 0 which means it will go out on the day of their birthday. You must configure the 2<sup>nd</sup> Message in the same manner you did the first.

#### Blast Marketing Messages

Email Message

Template: Birthday

ACTIVE

Exit

Save Template

Number of campaigns to run: 2

1st Message: 7 Days in Advance

2nd Message: 0 Days in Advance

Messages will be sent out based on the number of Days in Advance. Select 0 to send the message out the day of the event.

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.

#### Setup Darci

Setup Confirmations and Campaigns

Email Confirmations

Text Confirmations

Email Campaigns

Text Campaigns

EXIT

ACCEPT

Setup Account

Setup Notifications

E-forms

Activate and enter run times

Confirmations and Campaigns  8:00 AM

End Day Functions  8:00 PM