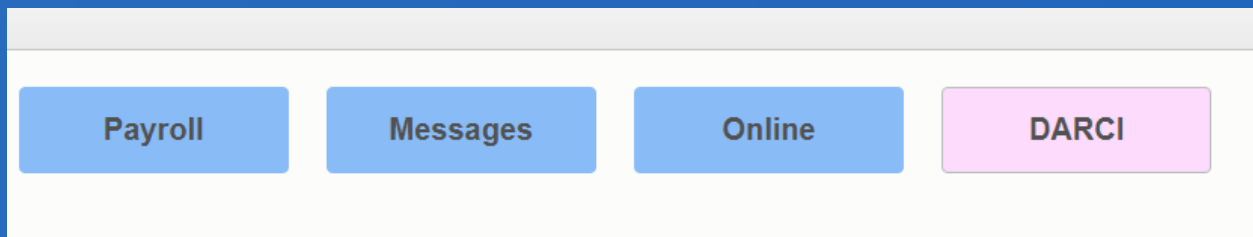


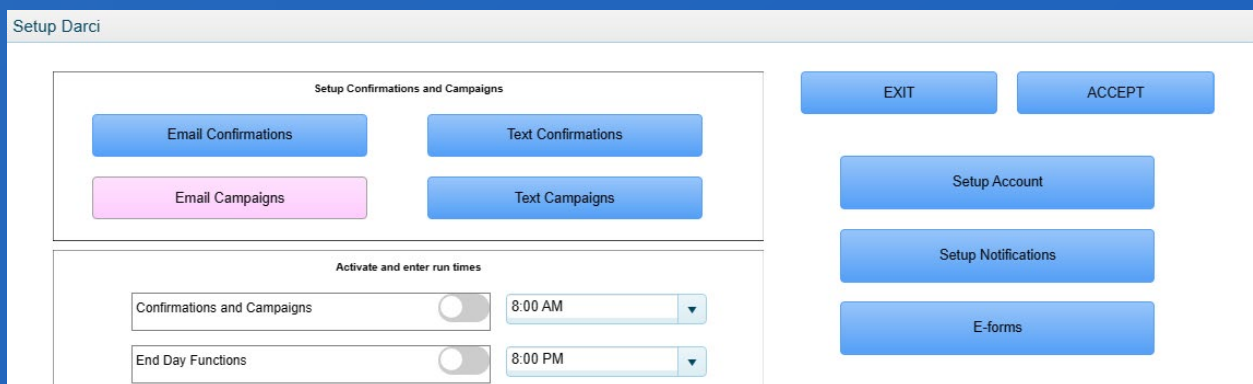
Birthday Email Campaign

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.

The screenshot shows the 'Blast Marketing Messages' interface. It features a form with several fields and buttons. The 'Email Message' section includes a 'Template' dropdown menu set to 'Birthday' (annotated with a red arrow and 'A'), an 'ACTIVE' checkbox (annotated with a red box and 'B'), and a 'Save Template' button. Below this, the 'Number of campaigns to run' is set to '1' (annotated with a red arrow and 'C'). To the right, a text box explains: '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.' Below this, the 'Days in Advance' is set to '7' (annotated with a red arrow and 'D'). At the bottom, there is a '1st Message' button (annotated with a red box and 'E'). An 'Exit' button is located in the top right corner.

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.

The screenshot shows a software interface titled "Set Message and Image". At the top, there is a text field containing "Birthday campaign. message number: 1" and two buttons labeled "Save" and "Exit". Below this is a "Subject" field with the text "Happy Birthday <CF>!". A "Send Test" button is located to the right of the subject field. The main area is a rich text editor with a toolbar. A red box labeled "A" highlights the font and size dropdowns, which are set to "Arial, Helvetica,..." and "3 (12pt)". Other icons in the toolbar are labeled with red letters: "C" for font color, "D" for background color, "E" for a link icon, and "F" for an image icon. At the bottom left, a red box labeled "B" contains a list of codes: "<BUSINESS>" for business name, "<CF>" for client's first name, "<CL>" for client's last name, "<BD>" for birth date, and "<AV>" for anniversary date. At the bottom right, there is a toggle switch labeled "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.

The screenshot shows the 'Set Message and Image' dialog box. At the top, there are fields for 'Birthday campaign. message number: 1' and 'Subject: Happy Birthday <CF>!'. To the right are 'Save', 'Exit', and 'Send Test' buttons. Below these is a rich text editor toolbar with options for font (Arial, Helvetica, ...), size (3 (12pt)), bold (B), italic (I), underline (U), and other formatting tools. A red circle highlights the 'Table Wizard' icon in the toolbar. A 'Table Wizard' dialog is open, showing a grid with a 2x2 table selected. Below the grid, it says 'Create a 2 x 2 table' and 'Table Wizard'. At the bottom of the main dialog, there is a list of codes: 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.

The screenshot shows the 'Set Message and Image' dialog box with the same fields and toolbar as the previous image. The rich text editor now contains a 2x2 table. The top-left cell is labeled 'A', the top-right cell is labeled 'C', the bottom-left cell is labeled 'B', and the bottom-right cell is labeled 'D'. The 'Table Wizard' icon in the toolbar is no longer highlighted.

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

Subject
Happy Birthday <CF>!

Save Exit

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!

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.

Attach Survey

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

Subject
Happy Birthday <CF>!

Save Exit

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 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.

Blast Marketing Messages

Email Message Exit

Template: Birthday ACTIVE Save Template

Number of campaigns to run: 2

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.

	Days in Advance
1st Message	7
2nd Message	0

10. Please note that all campaigns go out at the same time 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

Activate and enter run times

Confirmations and Campaigns	<input checked="" type="checkbox"/>	8:00 AM
End Day Functions	<input checked="" type="checkbox"/>	8:00 PM

EXIT | ACCEPT

Setup Account

Setup Notifications

E-forms