

How to...

BIRTHDAY AUTOMATION

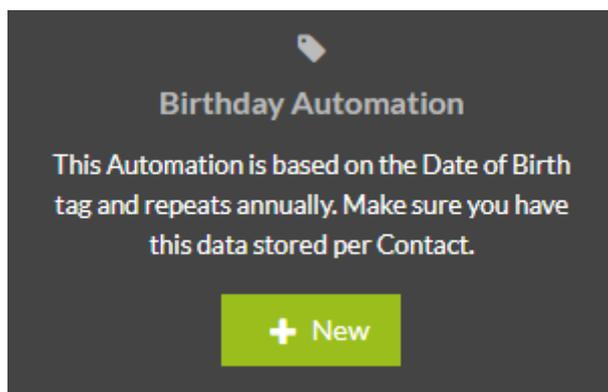


How to... Birthday Automation

Reach out and touch someone on their special day.

1. Choose a Preset

From the Automation Library screen, use the search box to search for "Birthday". Choose one of the several available preset options.



This guide assumes you've chosen the "Birthday Automation" in the Custom sector, but they're all quite similar - whichever option you choose, you'll be guided through the process.

Click the **New** button

2. Fill in the details

Type a new name for your Automation or leave the default one in there

Click **Next**

Type a description if you like. Again you can leave the default one in there, but this and the name can be helpful remembering what your Automation does at a glance. You can edit this information at any time.

Click **Next**. The following modal reminds you that the Automation is based on the Date of Birth tag, so for it to work, you need to have data in that field for each Contact. Click **Next** again

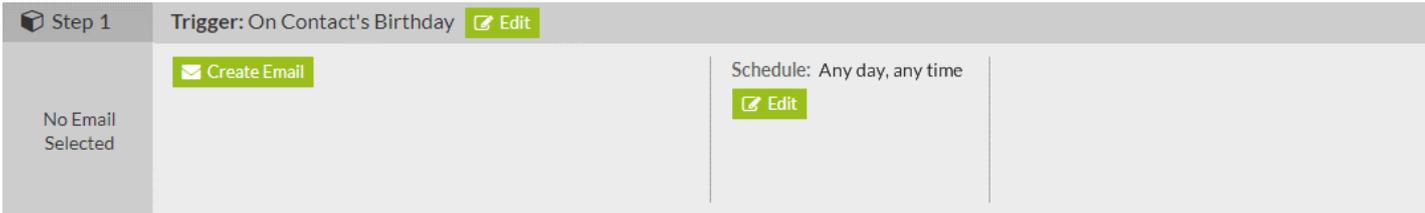
Choose an Audience for your Automation. This can be a Group, Segment or All Contacts, depending how focused you need to be. Choose carefully, this cannot be changed.

For more information, dip into our [Automation Audience guide](#)

Click **Next**

3. Steps and Triggers

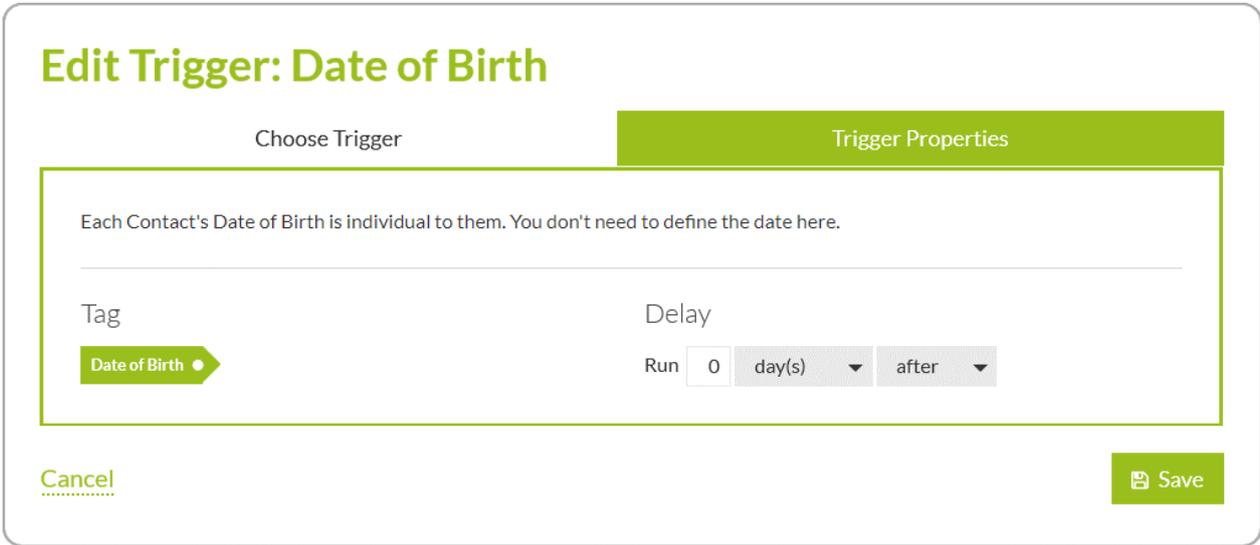
In your Workflow you'll see a single Step with the option for up to 5 in total.



The screenshot shows a workflow step configuration interface. At the top, it says "Step 1" and "Trigger: On Contact's Birthday" with an "Edit" button. Below this, there are three main sections: "No Email Selected" with a "Create Email" button, "Schedule: Any day, any time" with an "Edit" button, and a large empty area for additional configuration.

The Trigger for the first Step will already be set to "On Contact's Birthday". With this Trigger Type, the email you create on this Step will be sent to a Contact on their Birthday at one minute past midnight – unless you specify a Delay or change the [Schedule](#).

You can leave this Trigger as is, or if you click the "Edit" button on the Step, you can change its Type or Properties – although with this particular type of Trigger only the Delay is editable.

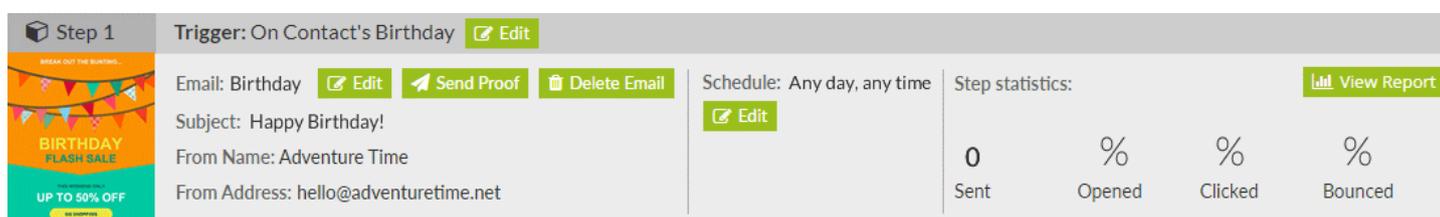


The screenshot shows a modal titled "Edit Trigger: Date of Birth". It has two tabs: "Choose Trigger" and "Trigger Properties". The "Trigger Properties" tab is active. The modal contains the following text: "Each Contact's Date of Birth is individual to them. You don't need to define the date here." Below this, there are two sections: "Tag" with a dropdown menu showing "Date of Birth" and "Delay" with a "Run" field set to "0", a "day(s)" dropdown, and an "after" dropdown. At the bottom, there are "Cancel" and "Save" buttons.

Once you've edited a Trigger to your satisfaction, click the "Save" button to close the modal and save your changes.

4. Create Emails

Click the **Create Email** button towards the left of each Step. This takes you through Email Details, Pick A Template and Add Content – just as if you were creating a "normal" non-automation Email in Create & Send. If you need guidance on any of this process, you can find out more in our [How to... Email Details guide](#) and [How to... Blocks guide](#)



The screenshot shows the configuration for Step 1. On the left is a thumbnail of a birthday email with a 'BIRTHDAY FLASH SALE' banner. The main configuration area includes:

- Trigger:** On Contact's Birthday (with an Edit button)
- Email:** Birthday (with an Edit button), Send Proof, and Delete Email buttons
- Subject:** Happy Birthday!
- From Name:** Adventure Time
- From Address:** hello@adventuretime.net
- Schedule:** Any day, any time (with an Edit button)
- Step statistics:** View Report button and a table showing 0 Sent, and percentages for Opened, Clicked, and Bounced.

After you've created your Email, click the **Finish & return to Steps** button top right. You'll now see a thumbnail image of your email on the left of the Step, and the email details.

5. Schedule and Go!

You've now got enough setup to go, but hold your horses; do you want to Schedule your send?

If so, click **Edit** next to Schedule and change the days and times that Step's Email is allowed to be sent. For a Birthday email, this may be a more robust method than setting a delay. See our [How to... Schedule a Step guide](#) for more information

When you're happy with your Steps (in this case, Step), click the **Start Automation** button in the top right to set everything in motion. Want to save your work but not quite ready to light the blue touch paper? Click the **Close** button next to **Start Automation**. Everything will be saved but the Automation will still be paused.

For more information on getting the most from your NewZapp account, visit our [Knowledge Base](#) or contact us on support@newzapp.co.uk.