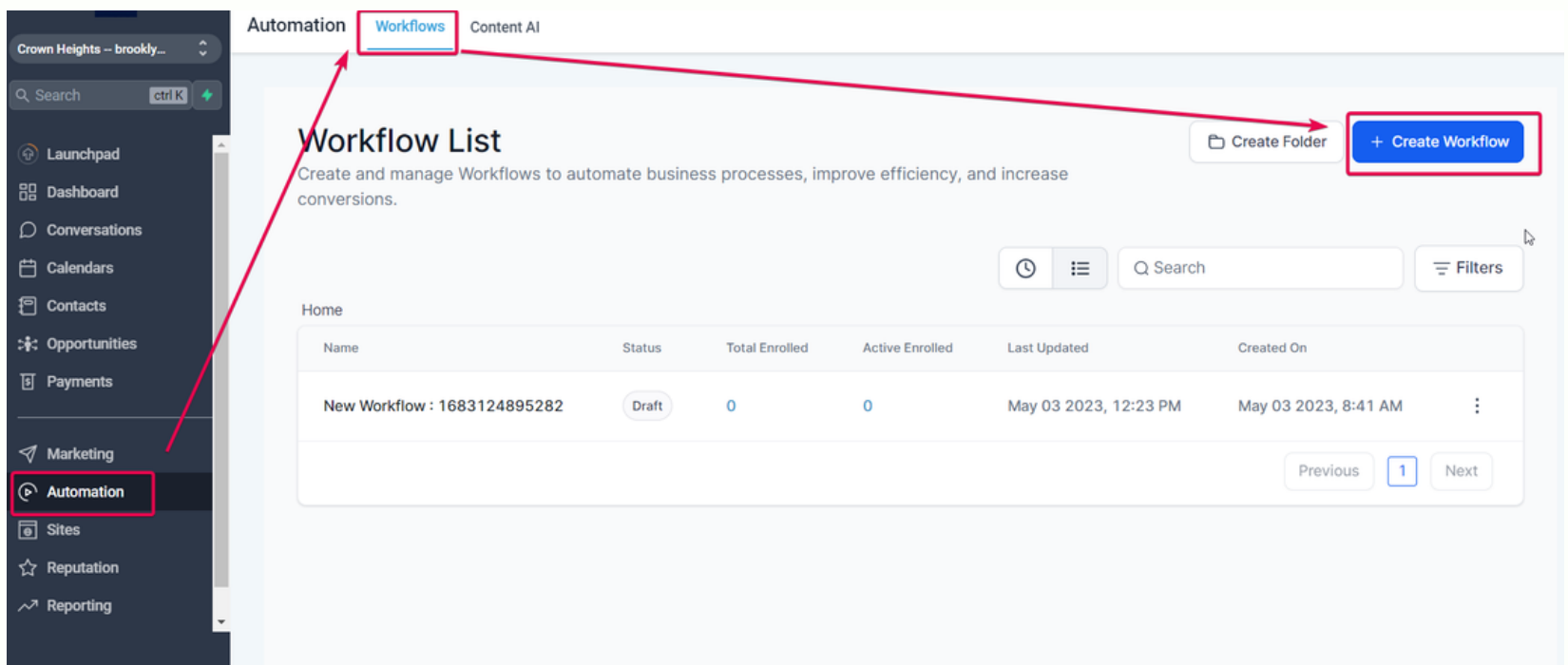




How to Create a Birthday Reminder Workflow?

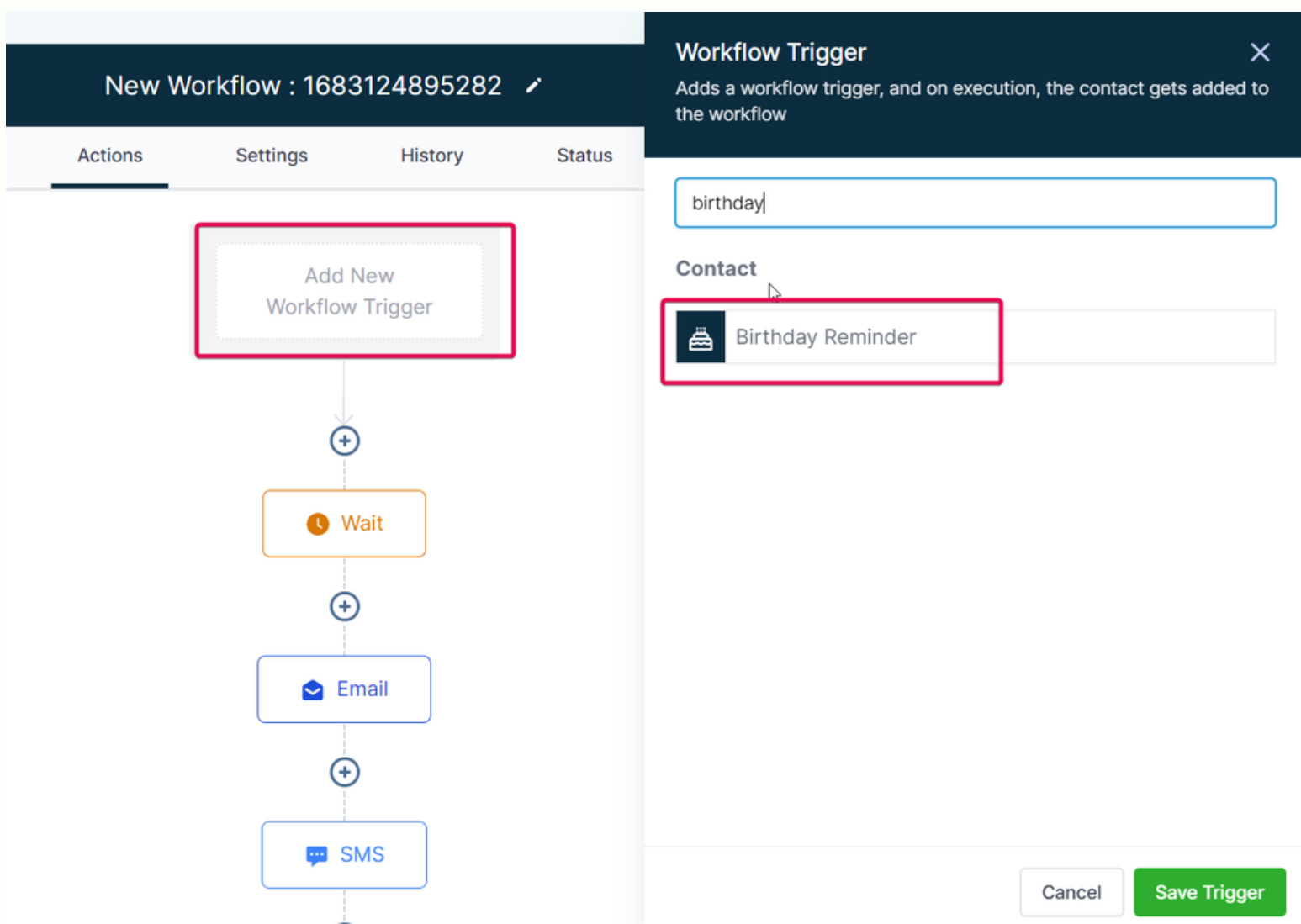
Step 1: Create a new workflow or edit an existing one

- In your account, either start a new workflow or select an existing one to edit.



Step 2: Add the Birthday Reminder Workflow Trigger

- Click "Add new Workflow Trigger."
- From the list of available triggers, select "Birthday Reminder."



Step 3: Customize the trigger

- Adjust the default settings according to your preferences. For example, you can change the number of days before or after the contact's birthday to activate the trigger. Add filters targeting specific months, days, or custom fields.

Adds a workflow trigger, and on execution, the contact gets added to the workflow

CHOOSE A WORKFLOW TRIGGER ⓘ

Birthday reminder

WORKFLOW TRIGGER NAME

Birthday Reminder

FILTERS

Select

Search

Standard Fields

After no. of days

Before no. of days

Day is

Month is

Custom Field

No data available

Cancel Save Trigger

Step 4: Save the trigger

- Click "Save" to save the changes to the trigger.

Adds a workflow trigger, and on execution, the contact gets added to the workflow

CHOOSE A WORKFLOW TRIGGER ⓘ

Birthday reminder

WORKFLOW TRIGGER NAME

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After no. of days

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Month is

Custom Field

No data available

Cancel Save Trigger



Step 5: Add actions to the workflow

- Now that the Workflow trigger is set, add actions to the workflow that will be executed when the trigger activates. Everyday actions include sending an email or SMS message. Add a Time Delay Wait Step before the action to send a message at a specific time. This allows you to control when the message is sent after the Workflow trigger is activated.

Step 6: Customize the actions

- Edit the content and design of your email or SMS messages to include personalized birthday wishes or offers.

The screenshot displays a workflow editor interface. At the top, it shows 'New Workflow : 1683124895282' with tabs for 'Actions', 'Settings', 'History', and 'Status'. The main workflow area shows a sequence of steps: 'Birthday Reminder' (trigger), 'Add New Workflow Trigger', a 'Wait' step, an 'Email' step (highlighted with a red box), and an 'SMS' step. On the right, a detailed view of the 'Email' action is shown, including a subject line: 'Happy Birthday, {{contact.first_name}}! Enjoy Your Special'. The message body contains personalized text: 'Today is a special day – it's your birthday! 🎉 We wanted to take a moment to wish you the happiest of birthdays and let you know how much we appreciate having you as our valued customer. To make your day even more special, we have a little surprise just for you: [Exclusive Offer]! 🎁 To redeem your gift, simply visit our [store/website] and use the promo code [PromoCode] at checkout. But'. The interface includes a rich text editor with various formatting options and a 'Save Action' button.

Step 7: Test the workflow

- Set a contact's birthdate to the next day or set it to any date and use a days before filter to make the workflow fire off the next day. It automatically gets fired off by searching your contacts list for birthdates on that date at 8 AM every day. You do not need to add contacts to this workflow yourself.

Step 8: Save and publish the workflow

- Once you're satisfied with the setup, save the workflow and toggle the switch to "Publish" to enable the workflow.

The screenshot shows a workflow editor interface. At the top, there is a dark blue header with the text "New Workflow : 1683124895282" and a "Save" button. Below the header, there are tabs for "Actions", "Settings", "History", and "Status". To the right of these tabs, there is a "Test Workflow" button and a "Draft" toggle switch that is currently set to "Publish". The main area of the editor shows a workflow diagram. It starts with a "Birthday Reminder" trigger, followed by an "Add New Workflow Trigger" button. Below this, there is a "Wait" step (represented by an orange box with a clock icon) and an "Email" step (represented by a blue box with an envelope icon). The workflow is connected by a vertical line with plus signs indicating connection points.

Step 9: Monitor and optimize

- Track the performance of your Birthday Reminder Workflow over time to gather insights and make any necessary adjustments to improve its effectiveness.