

How do I create a happy birthday automation?

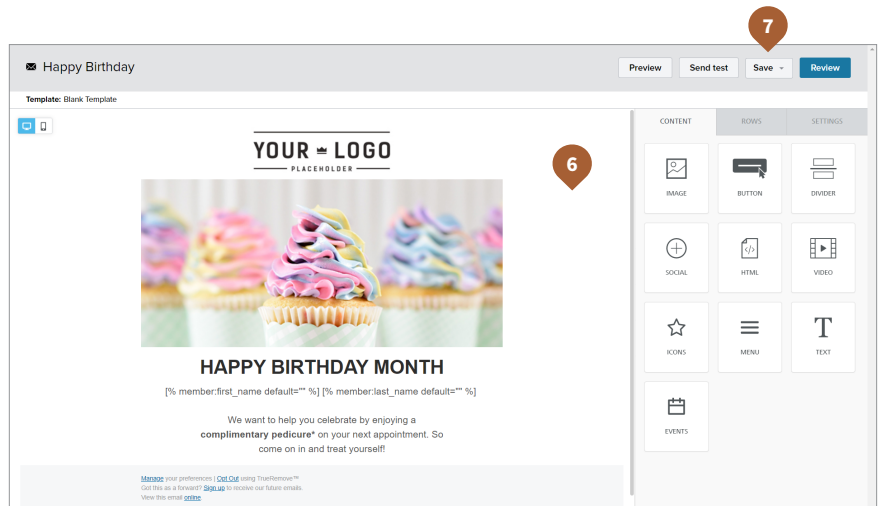
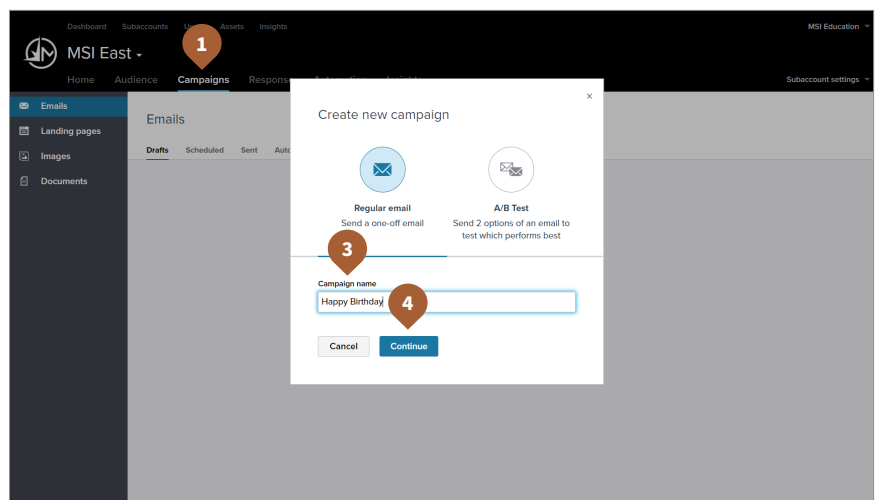
Create this email campaign in two easy steps. Birthday emails will send the first of the month.

Example: If a client's birthday is May 24th the email will send May 1st.

Step 1: Create a Campaign

1. Select the **Campaigns** tab
2. Select the **Create new campaign**
3. Enter **Happy Birthday** as the **Campaign name**
4. Select **Continue**
5. Choose a **Template** or **Start from Scratch**
6. Customize your campaign
Refer to the Email Marketing Powered by Emma course for more information on customizing your campaign.
7. Select **Save** and **Save** again

Tip: Select **Send Test** to send a test to view how your final email will appear.



Step 2: Create an Automation

1. Select the **Automation** tab
2. Select **Create new workflow**
3. Enter **Happy Birthday** as the **Workflow name**
4. Select **Audience**
5. Select **Any contact in the audience**
6. Select **Confirm**
7. Select **Trigger event**
8. Select **Date-based**
9. Select **Next**
10. Select **BDate**
11. Select **Next**
12. Select **Every year on the anniversary of this date (birthdays, anniversaries, etc.)**
13. Select **Next**
14. Select **Confirm**
15. Select **+ sign**
16. Select **Happy Birthday** under **Mailing**
17. Enter a **Subject** name
18. Select **Save & publish**
19. Toggle to **Active**
20. Select **Save workflow**

