

QRC – Automated Marketing Campaign Send a Birthday Email

MARKETING SUITE KNOWLEDGE GUIDES ON EMAIL BIRTHDAY CAMPAIGN:

- [Happy Birthday Greeting Card Campaign](#)
- [Happy Birthday Greeting Card Designs](#)
- [Activating your Automated Campaigns](#)
- [Set Up Admin Notifications](#)
- [Automated Campaign Performance](#)
- [Selecting an Audience for Automated Campaigns](#)
- [When do my Campaigns go out](#)

Using Automated Marketing for Birthday Emails

Digital Best Practices:

SET AND FORGET BIRTHDAY EMAIL AUTOMATION

Equitable Advisors Marketing SuiteSM (Marketing Suite) enables several automated marketing opportunities including the ability to set and forget a birthday email for your targeted audience.

It is important to note that in Marketing Suite all marketing automations are toggled off by default and when toggled on, they default to sending to all your marketing suite contacts. It is important that for all marketing automations you thoughtfully identify the appropriate target audience.

This QRC will outline the steps to set up your automated birthday email campaign by creating an auto updating campaign in Salesforce. Only Salesforce contacts that have a date of birth will receive an automated email birthday greeting in this campaign. Note: you can also upload a list of contacts into Marketing Suite by using the Import CSV functionality.

Before you toggle the birthday email campaign on in Marketing Suite follow these steps in Salesforce.

- **Step 1:**
 - Identify your targeted audience for birthday emails – determine the correct audience (e.g., all clients, all clients and prospects, Tier A and B clients only?) in Salesforce and create a campaign for that audience.



- Note: you may have already created a Salesforce campaign for another purpose that can also be used for this campaign. To ensure that newly eligible recipients are added throughout the year you must utilize an Auto Updating campaign. Learn more about [Salesforce integrations](#) and creating [Salesforce campaigns](#).

- **Step 2:**
 - If changes have been made to the campaign members that you wish to take effect immediately, it is a best practice to "Refresh Now" in Salesforce. Otherwise, auto updating campaigns will refresh automatically on a nightly basis.
- **Step 3:**
 - Update your contacts in Marketing Suite
 - From left navigation > Contacts > Manage Contacts > Update Contacts
 - Note: To confirm your sync settings, click on drop down arrow > Update current settings.
 - If "All Contacts/Campaigns" is selected all contacts and campaigns will refresh when you select "Update Contacts"
 - If "Just Specific Campaigns" is selected, only the selected campaigns will refresh when you select "Update Contacts"



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MARKETING TOOLS

- Content Library
- Automated Marketing
- Email
- Social
- Events
- Landing Page

SETTINGS

- Profile
- Contacts**
- Manage Contacts
- Manage Groups

Contacts

Add Contact | Update Contacts

Last Salesforce Sync: 17 hours ago

Name	Email	Email Status	Groups	Source	Date Added	Actions
Donovan, Laura		Missing	4 Groups	Imported...	09/12/2023	Actions
Brody, Bartholomew		Missing	4 Groups	Imported...	09/12/2023	Actions
test, state		Missing	4 Groups	Imported...	09/12/2023	Actions
Ipad, Apple		Missing	4 Groups	Imported...	09/12/2023	Actions
Zzzindcleanup, Duplicate		Missing	4 Groups	Imported...	09/12/2023	Actions

- Click on Update Contacts
- The system will refresh your contacts (this may take a few minutes to complete depending on size of your book of business). A sync message will display.

Marketing Calendar

MARKETING TOOLS

- Content Library
- Automated Marketing
- Email

Contacts

Add Contact | Update Contacts

The system is currently syncing your data from Salesforce.

- The message will update when sync is complete.

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MARKETING TOOLS

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Contacts

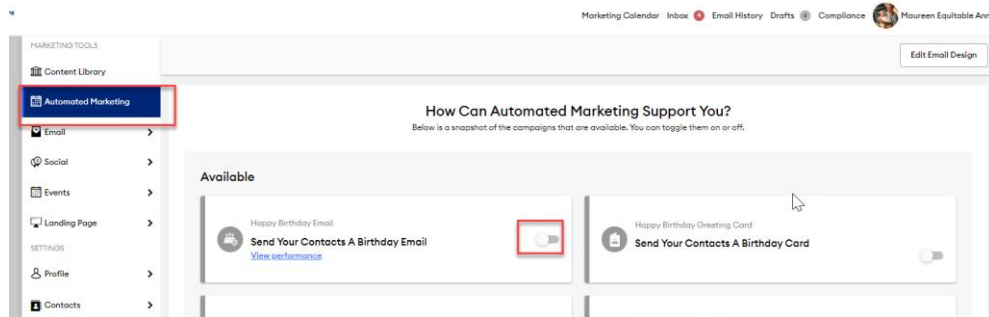
Add Contact | Update Contacts

Last Salesforce Sync: a minute ago

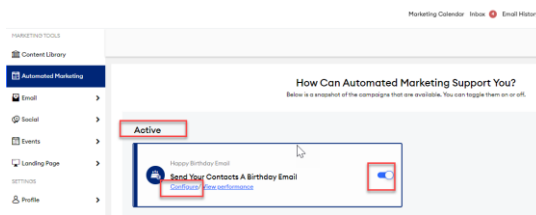
Name	Email	Email Status	Groups	Source	Date Added
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Step 4:

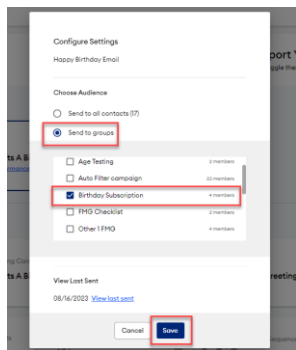
- From left navigation, select Automated Marketing



- Turn the Happy Birthday Email on by sliding toggle to the right.
- This updates the campaign to "Active"
- Identify the correct audience by selecting "Configure"



- Select the Marketing Suite Group(s) you wish to include and "Save"



- Set up is complete

Note: The Marketing Calendar will show your upcoming marketing activities (including mailing that results from this automated birthday email campaign).



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**Marketing
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Marketing Calendar

Stay informed, stay ahead: keep up-to-date on the content being sent out to your customers.

February

Wed 07	Happy Birthday Mos Fmgqemaltest Automated	Preview
Sat 10	Happy Birthday Mo Fmgmantest Automated	Preview
Mon 12	Happy Birthday Maureen Fmgmail Automated	Preview
Thu 15	Happy Birthday Mo Fmgvalootest Automated	Preview

READY TO LEARN MORE?

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