

Happy Birthday Message to Members

Step by Step Guide

Step One

Make sure you have an option to enter a Date of Birth in your member application and profile.

Recommendation – Create date and month drop downs to select from instead of a free form text box to prevent having to create multiple saved searches for each possible entry for the month like we did. This also give you the option so send by exact date instead of by month like us. It's really up to you on how you wan to do it. ☺

Step Two

Create a saved search for each month and entry type.

This is done through Advance search in WildApricot. I'll use January for this example.

- I titled my saved searches as “(Month) Birthdays (Date of Birth begins with type)”.
- Add the criteria...

1. Member status is Active
2. Date of Birth begins with 01
3. Save search as: December Birthdays 01
4. Save

Repeat and save for these additional January “begins with” types.

- Note: You can simply change the begins with type, add your new save search as title, and select save. Makes creating them quick and easy.

- 1-
- 1/
- 1.
- 01-
- 01/
- 01.
- Jan
- January

Warning: Don't use 1 for January because November and December birthdays will also start with 1.

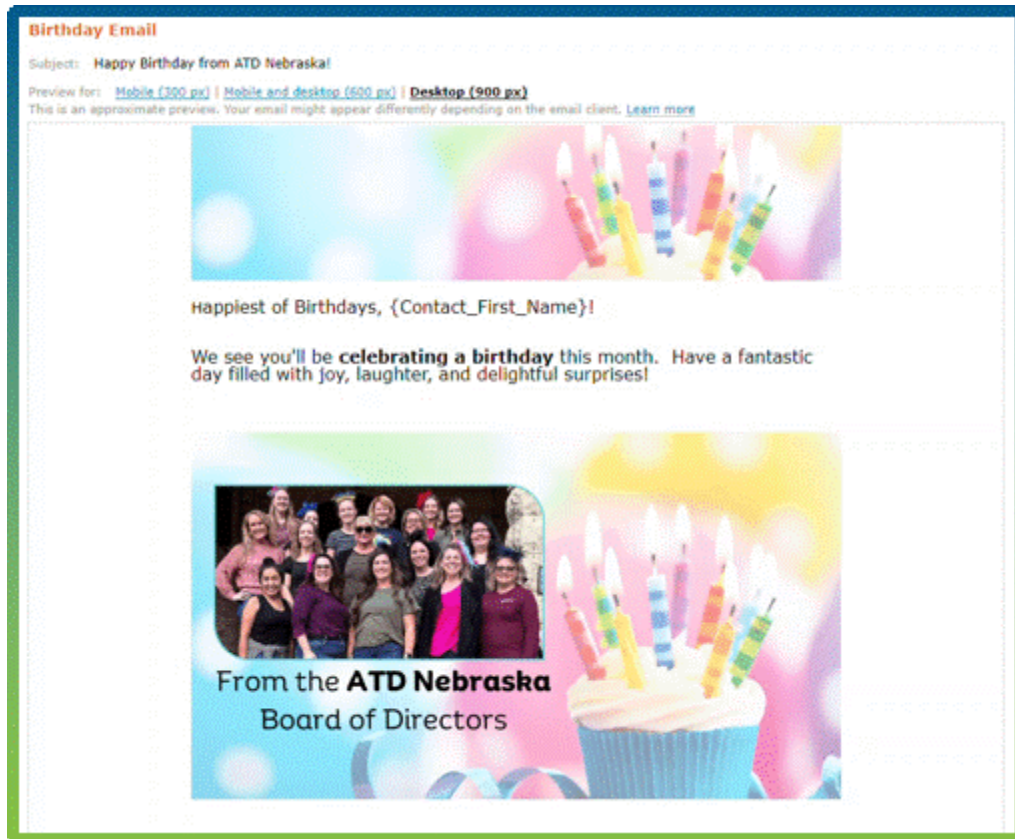
For all the other months you shouldn't need to use the number/symbol combos, just the number and month options they would start with.

Sharing Our Success

Step Three

Create you Birthday email template.

This is what ours looks like today and we plan to change it every year.
Our bottom image is a gif (created in Canva) to add some animation to the message.



Step Four

Schedule the emails to go out.

From the template, click on the **Send email** button at the top.

Edit template

Delete

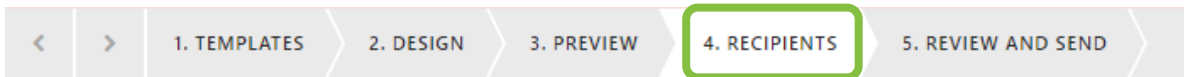
Duplicate

Send email

Birthday Email

Sharing Our Success

Go to the **Recipients** step at the top.



Click on the **+Contact list** button and select the searches you created in *Step Two* for the month you are scheduling.

Choose recipients and subject

Recipients: No recipients

[+ Contact](#) [+ Contact list](#) [Clear](#)

Subject: Happy Birthday from ATD Nebraska!
Type { to see available macros

Reply to: Kristina Pohlmann kg0df

Tracking: ☒ Enable link and open email tracking

Add contact list

- ☐ February Birthdays Feb
- ☐ February Birthdays February
- ☒ January Birthdays 01
- ☒ January Birthdays 01-
- ☒ January Birthdays 01.
- ☒ January Birthdays 01/
- ☒ January Birthdays 1-
- ☒ January Birthdays 1.
- ☒ January Birthdays 1/
- ☒ January Birthdays Jan
- ☒ January Birthdays January
- ☐ July Birthdays
- ☐ July Birthdays 07
- ☐ July Birthdays 7
- ☐ July Birthdays Jul
- ☐ July Birthdays July
- ☐ June Birthdays

[Add selection](#) [Cancel](#)

Now go to **Review and Send (1)**. Select **Schedule for later (2)**, pick your **date and time (3)**, then select **Schedule (4)**.

1. REVIEW AND SEND

Save ✓ Saved at 9:07 AM

Delivery setup

When to send

☐ Send it now

☒ Schedule for later 2

Choose delivery date and time

Date: 01 Jan 2025 3

Time: 09 : 00 AM PM

Recipients and subject [Edit](#)

Send to: 3 recipient(s)

Subject: Happy Birthday from ATD Nebraska!

Reply to: Kristina Pohlmann <directormembereperience@atdnebraska.org>

Tracking: Enabled until 06 Oct 2024

Design [Edit](#)

4 Schedule

That month is scheduled, repeat for each month of the year and you're done!