

# What is a Birthday Campaign?

A Birthday Campaign is a marketing strategy that celebrates your customer's special day with personalized messages, exclusive discounts, or special rewards. It is designed to make customers feel valued, strengthen brand loyalty, and encourage repeat purchases.

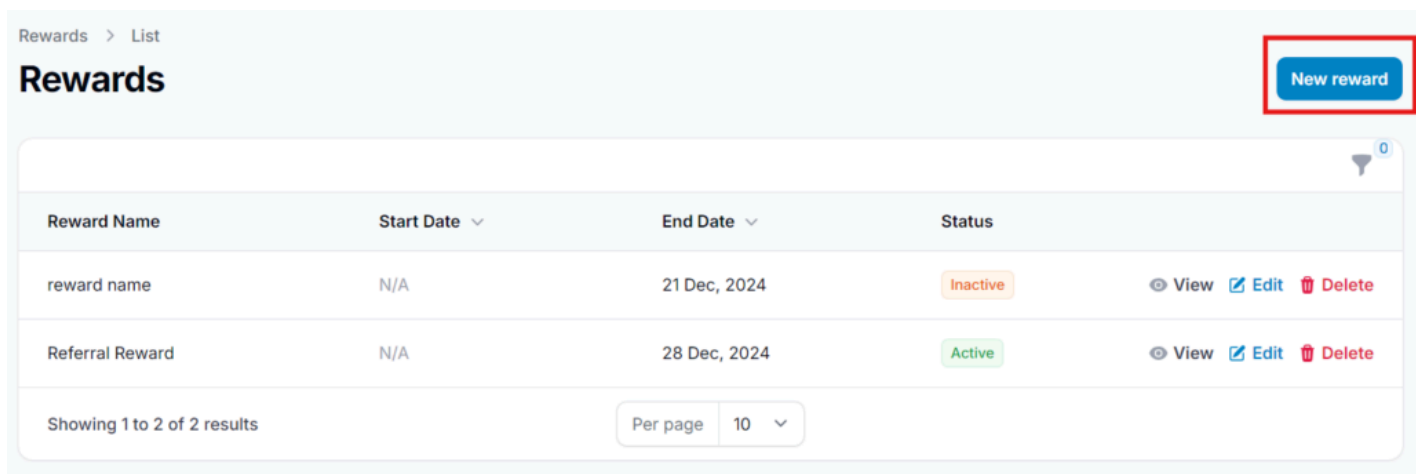
This guide walks you through setting up a complete Birthday Campaign, from creating the reward to activating the automated campaign.

**Example:** Ahmad runs a café in Petaling Jaya. He sets up a Birthday Campaign that automatically sends a "Free Slice of Cake" voucher to each customer at the start of their birthday month via WhatsApp. Customers receive a personalised message with a direct link to redeem the reward — no manual work needed from Ahmad's team.

## Step 1: Create Rewards for the Campaign

Start by setting up the birthday reward that customers will receive. Go to **Admin Panel > Loyalty Program > Rewards** and click **New Reward**. Fill in the reward details including the name, type, and value.

For a detailed guide on creating rewards, see [How to Create Rewards](#).



The screenshot shows the 'Rewards' management interface. At the top right, there is a blue button labeled 'New reward' highlighted with a red box. Below it is a table with the following columns: Reward Name, Start Date, End Date, and Status. The table contains two rows of data:

Reward Name	Start Date	End Date	Status	
reward name	N/A	21 Dec, 2024	Inactive	View Edit Delete
Referral Reward	N/A	28 Dec, 2024	Active	View Edit Delete

At the bottom of the table, it says 'Showing 1 to 2 of 2 results' and 'Per page 10'.

## Step 2: Edit Reward and Enable Auto-Assign

Once the reward is created, go to **Admin Panel > Loyalty Program > Rewards**, locate your reward, and click **Edit**.

Rewards > List

## Rewards

[New reward](#)

Reward Name	Space	Points	
Free One Slice of Cake	Jiu Cafe	100	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>
Free One Drink	Jiu Cafe	50	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>

Showing 1 to 2 of 2 results

Per page 10

In the **Automations** tab, activate the following options:

- **Auto-assign to Birthday Customers** — Automatically assigns this reward to customers during their birthday month.
- **Auto-assign on the day of registration** — Assigns the reward when a new customer registers.

**Birthday**

**Auto-assign to Birthday Customers** Quantity\*

By Default, the reward will given the next day after registration if this month is customer's birthday month.  
Enable on-the-day option to give the reward on the day of registration.

**Advanced**

**Auto-assign on the day of registration**

In the **Distribution** section, ensure that the **Distribution** toggle is enabled. This allows the reward to be distributed to customers.

**Distribution**

Enable this to let customers redeem rewards on their own.

**Distributable**  **Schedule**

Enable this option if the reward is for redemption purpose.

## Step 3: Get the Reward Link

The **Direct Link Access** feature in Reward Configuration automatically redirects customers to the reward after they log in.

To set this up:

1. Go to the **Configuration** settings of your reward.
2. Turn on **Customer Direct Link Access**.

3. Copy the generated link. You will use this link later in the campaign message.
4. To make the reward accessible only via the direct link (and not visible in the marketplace), disable **Display in Customer Portal (Marketplace)** in the Configuration section. This ensures customers can only access the birthday reward through the link you send them in the campaign message.

The screenshot displays a configuration panel for a reward. At the top, there is a text input field labeled "Points to Redeem" with the value "0". Below this is a toggle switch for "Single Redemption", which is currently turned off. A sub-section titled "Customer Direct Link Access" is highlighted with a red border; it features a toggle switch that is turned on, followed by the text "Enable this option if you want to provide a direct link for customers to redeem the reward." and the URL "The link is : <https://explore-uat.pixalink.io/l/spa-demo-account/rewards/108>". Below this is another sub-section titled "Availability Management" containing a toggle switch for "Enable Reward Limit", which is turned off. At the bottom of the configuration area, there is a section titled "Reward Visibility Settings" with the instruction "Control when and how customers can see this reward in their portal." and a toggle switch for "Display in Customer Portal (Marketplace)", which is turned off.

## Step 4: Enable Notification Settings

Go to the **Notifications** tab and enable the notification toggle. The system will automatically notify customers at the beginning of their birthday month.

For example, a customer with a birthday on 25 March will receive the notification on 1 March.

Reward Details Settings Automations **Advanced Settings** Configurations

### Notification Settings

Customise notification settings for this reward

#### New Reward Notification

If enabled, your customers will receive this notification when they receive this reward.

Enabled

[Reset To Default](#) [Send Test Notification](#)

Message\*

**B I ↶ ↷**

Hi {{NAME}}, you have received a new reward from {{SPACE\_NAME}}!

Reward: {{REWARD\_NAME}}  
Points to redeem: {{REWARD\_POINTS}}  
Valid till: {{REWARD\_EXPIRED}}

To redeem this reward, head over to {{REWARD\_REDEEM}} now.

Attachment

Drag & Drop your files or [Browse](#)

Max 2MB per file, only image is allowed.

[Show Variable](#)

Preview









Hi Ali, you have received a new reward from Lumina Heath !

**Reward:** Birthday Gift  
**Points to redeem:** 0  
**Valid till:** 14 May 2025, 11:59 PM

To redeem this reward, head over to <https://demo.pixalink.io/1/7/rewards/1/claimed/1> now.

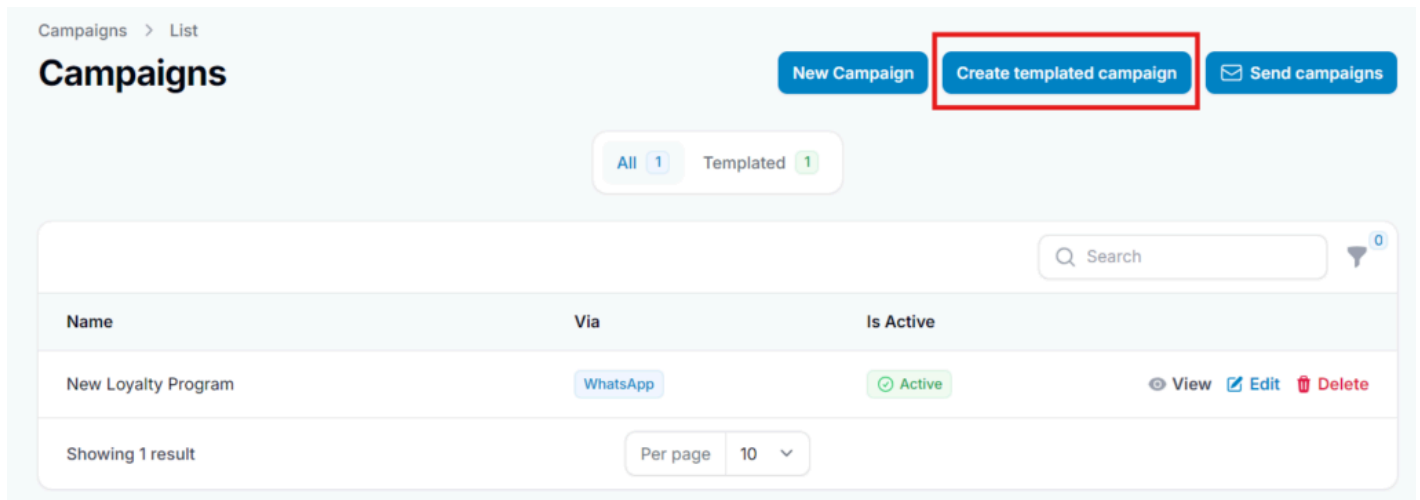
## Step 5: Navigate to Campaigns

Go to **Admin Panel > CRM > Campaigns**.

-  Dashboard
- Loyalty Program** 
- Reservation** 
- CRM** 
-  Broadcasts
-  **Campaigns**
-  Customers
-  Scan & Share

## Step 6: Create Templated Campaign

Select **Create Templated Campaign** to use a pre-built campaign structure. Templated campaigns provide a ready-made framework that simplifies the setup process.



Campaigns > List

### Campaigns

New Campaign **Create templated campaign** Send campaigns

All 1 Templated 1

Search

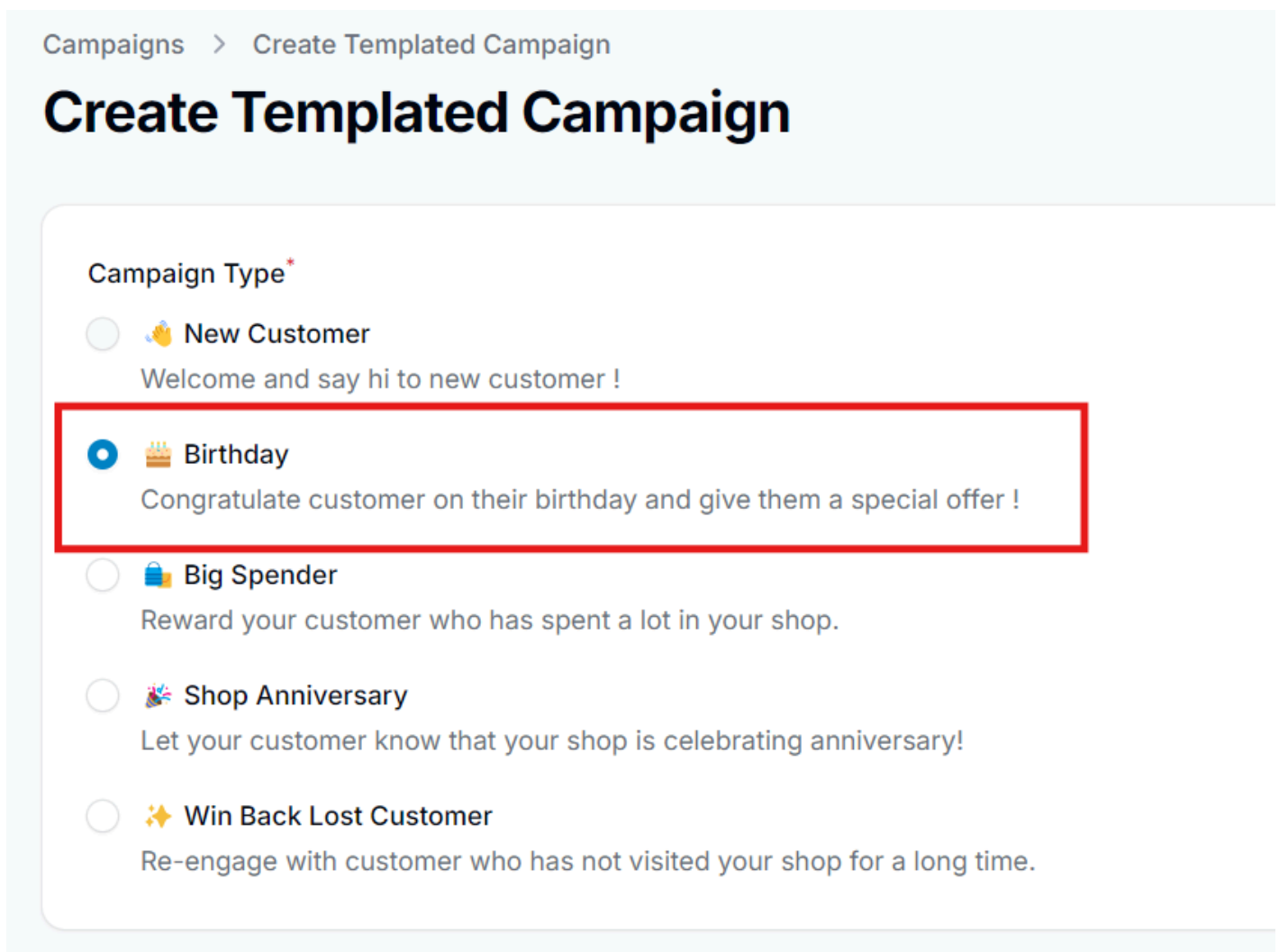
Name	Via	Is Active	
New Loyalty Program	WhatsApp	Active	View Edit Delete

Showing 1 result

Per page 10

## Step 7: Select Birthday Template

Choose **Birthday** from the list of available templates.



Campaigns > Create Templated Campaign

## Create Templated Campaign

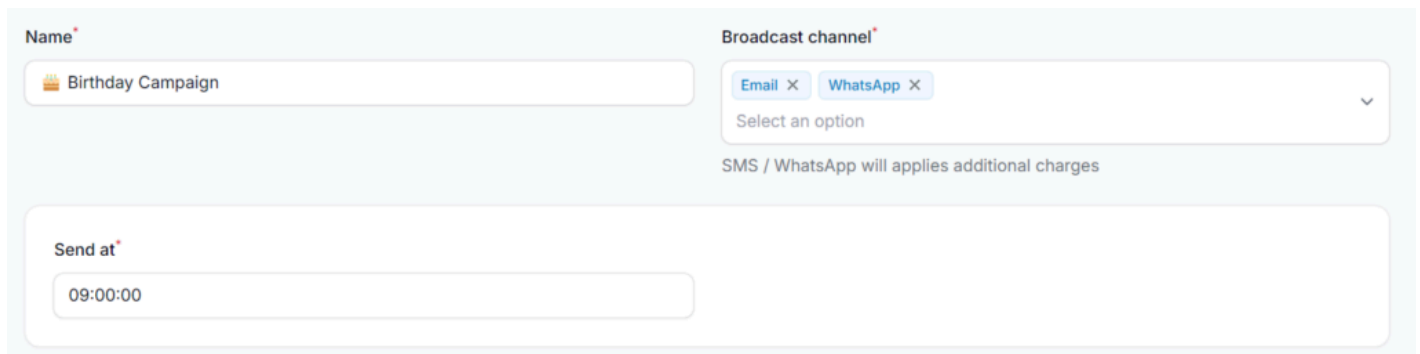
Campaign Type\*

- 🙌 New Customer  
Welcome and say hi to new customer !
- 🎂 Birthday  
Congratulate customer on their birthday and give them a special offer !
- 💰 Big Spender  
Reward your customer who has spent a lot in your shop.
- 🎉 Shop Anniversary  
Let your customer know that your shop is celebrating anniversary!
- ✨ Win Back Lost Customer  
Re-engage with customer who has not visited your shop for a long time.

## Step 8: Fill In Campaign Details

Enter the campaign details including:

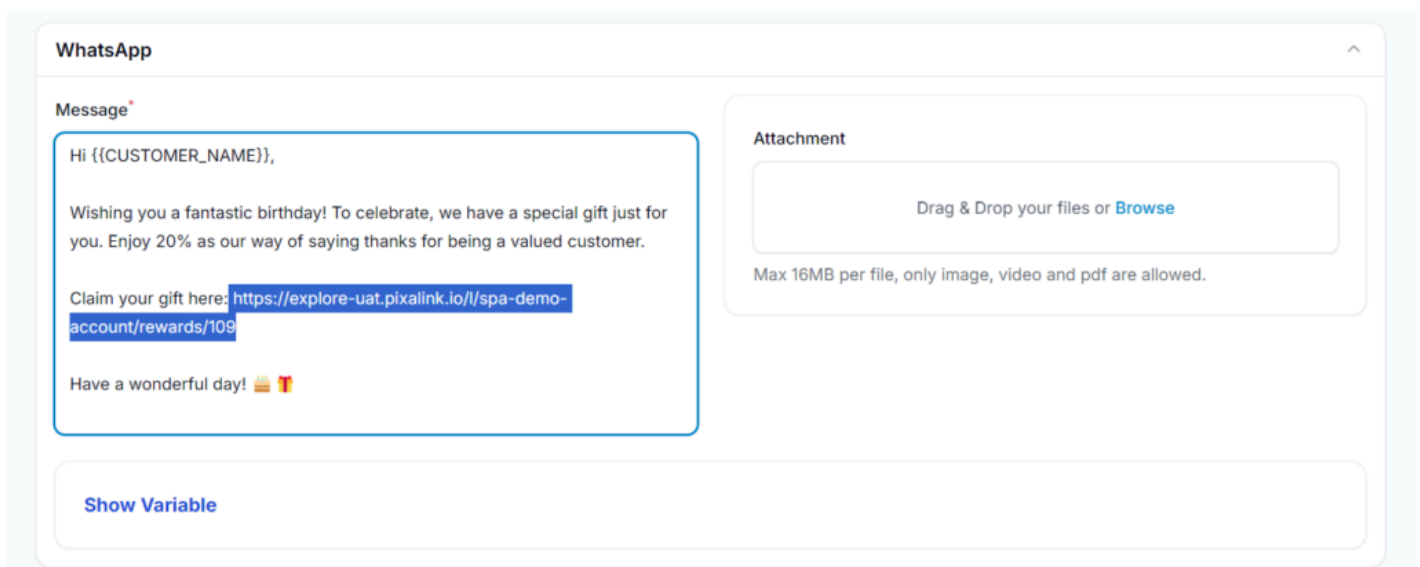
- Campaign name
- Message content
- Broadcast channel (Email, SMS, or WhatsApp)
- Delivery time
- Attached rewards



The screenshot shows a form for setting up a campaign. It has three main sections: 'Name', 'Broadcast channel', and 'Send at'. The 'Name' field contains 'Birthday Campaign'. The 'Broadcast channel' dropdown is set to 'Email' and 'WhatsApp'. Below it, a note says 'SMS / WhatsApp will apply additional charges'. The 'Send at' field is set to '09:00:00'.

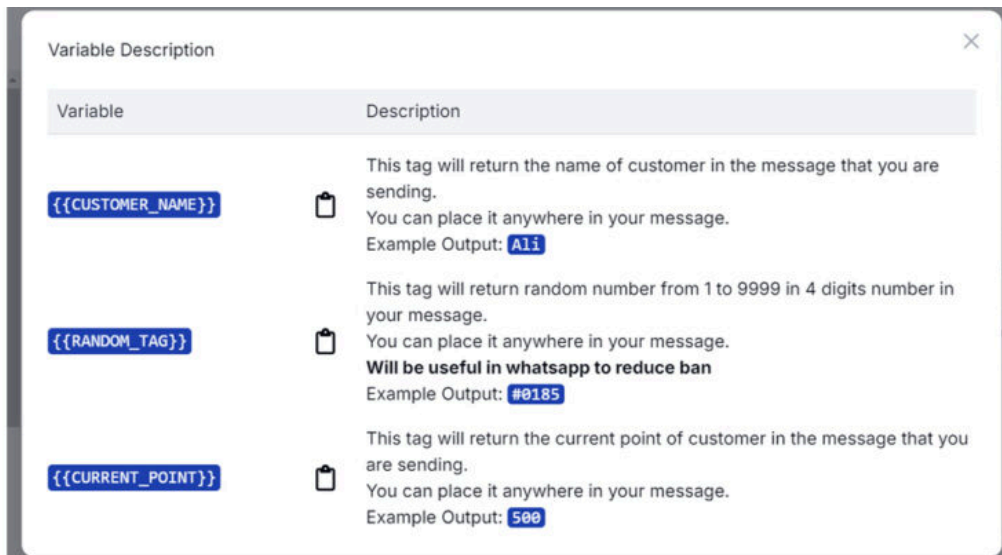
### Campaign Field Descriptions

- **Name** - Enter a clear, descriptive name for your campaign (e.g., "Birthday Special Discount").
- **Broadcast Channel** - Select your preferred channel: Email, SMS, or WhatsApp. Click the X button to remove a channel if needed.
- **Send At** - Set the specific delivery time on the customer's birthday.



The screenshot shows the 'WhatsApp' configuration form. It has two main sections: 'Message' and 'Attachment'. The 'Message' field contains a template with a placeholder for the customer's name, a birthday wish, a 20% discount offer, a link to a rewards page, and a closing message with a gift icon. The 'Attachment' field has a 'Drag & Drop your files or Browse' button and a note that the maximum file size is 16MB and only images, videos, and PDFs are allowed. A 'Show Variable' button is located at the bottom of the form.

- **Message** - Use or customize the Pixalink template. Paste the reward link (from Step 3) into the message content so customers can access their birthday reward directly.
- **Attachment** - Optionally add an image, PDF, or short GIF to make the message more engaging.



## Message Variables

You can use the following variables in your message to personalize it:

Variable	Description
<code>{{CUSTOMER_NAME}}</code>	The customer's name
<code>{{RANDOM_TAG}}</code>	A random 4-digit number (helps avoid WhatsApp message filtering)
<code>{{CURRENT_POINT}}</code>	The customer's current loyalty points balance

## Step 9: Click Create

Once you have filled in all the details, click **Create** to save and activate the Birthday Campaign.

**WhatsApp**

Message\*

Hi `{{CUSTOMER_NAME}}`,

Wishing you a fantastic birthday! To celebrate, we have a special gift just for you. Enjoy 20% as our way of saying thanks for being a valued customer.

Claim your gift here: <https://explore-uat.pixalink.io/l/spa-demo-account/rewards/109>

Have a wonderful day! 🎂🎁

**Attachment**

Drag & Drop your files or [Browse](#)

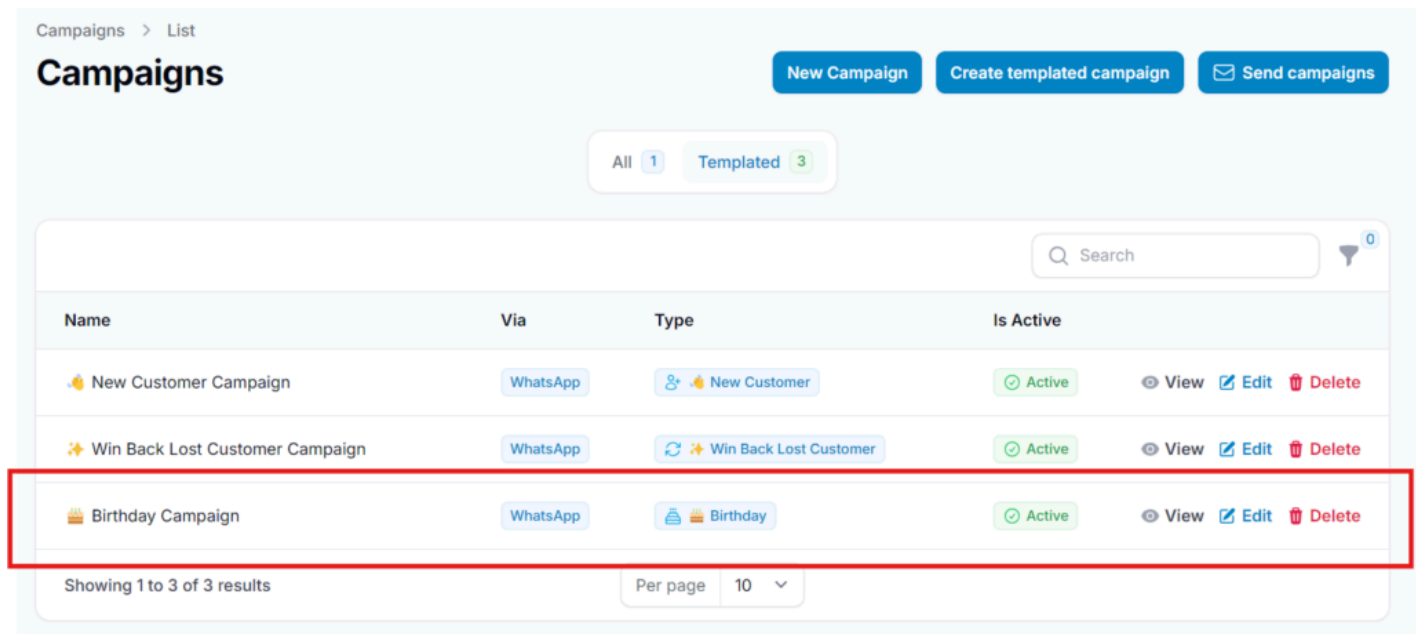
Max 16MB per file, only image, video and pdf are all

[Show Variable](#)

Create
Cancel

## Step 10: Setup Complete

Your Birthday Campaign is now active and will automatically send messages on each customer's birthday. No manual broadcasting is required as long as the templated campaign remains enabled.



The screenshot shows the 'Campaigns List' interface. At the top, there are buttons for 'New Campaign', 'Create templated campaign', and 'Send campaigns'. Below these are filters for 'All' (1) and 'Templated' (3). A search bar is present on the right. The main table lists three campaigns:

Name	Via	Type	Is Active	Actions
New Customer Campaign	WhatsApp	New Customer	Active	View Edit Delete
Win Back Lost Customer Campaign	WhatsApp	Win Back Lost Customer	Active	View Edit Delete
<b>Birthday Campaign</b>	WhatsApp	Birthday	Active	View Edit Delete

At the bottom, it shows 'Showing 1 to 3 of 3 results' and 'Per page 10'.

**Note:** Templated campaigns automatically generate and send broadcasts. Custom campaigns require manual broadcast creation.

## What Your Customers Will See

Customers will receive a personalised birthday message through their chosen channel (WhatsApp, SMS, or Email) at the start of their birthday month. The message includes a direct link to redeem their birthday reward from the Customer Portal.

## Good to Know

- Birthday Campaigns are templated — once set up, they run automatically with no manual broadcasting required
- Customers are notified at the beginning of their birthday month, not on the exact day
- Use `{{CUSTOMER_NAME}}` in your message to personalise it with the customer's name
- Use `{{RANDOM_TAG}}` to vary message content and reduce the risk of WhatsApp message filtering
- The reward link in the message takes customers directly to the reward after login