

How to See Which Customers Have a Birthday Coming Up

What Is This?

Pixalink doesn't send you, the business owner, a reminder before a customer's birthday. Instead, you can pull up next month's birthdays in under a minute from your customer list. Do it once a month and your team can plan cakes, calls or a personal greeting ahead of time.

Real-Life Example

Siti runs a pet grooming salon in Shah Alam. She wanted to call her regulars before their birthdays, so she asked if Pixalink could remind her. There's no reminder, so on the last week of each month she opens **Customers** and filters by next month's **Birthday Month**. She adds the **Date of Birth** column and exports the list for her front-desk staff. Now every customer with a November birthday gets a call and a free nail trim offer. Her staff no longer miss a birthday, and repeat bookings in birthday months went up.

How to Set It Up

1. Go to **Admin Panel** → **CRM** → **Customers**.

 Dashboard

Loyalty Program

 Record Points

 Point History

 Rewards

 Customer Portal Design

 News Feeds

 Referral Configurations

 Tier Configurations

 Feedbacks

Reservation

 Calendars

 Reservations

CRM

 Broadcast Batches

 Campaigns

 Customers

 Scan & Share

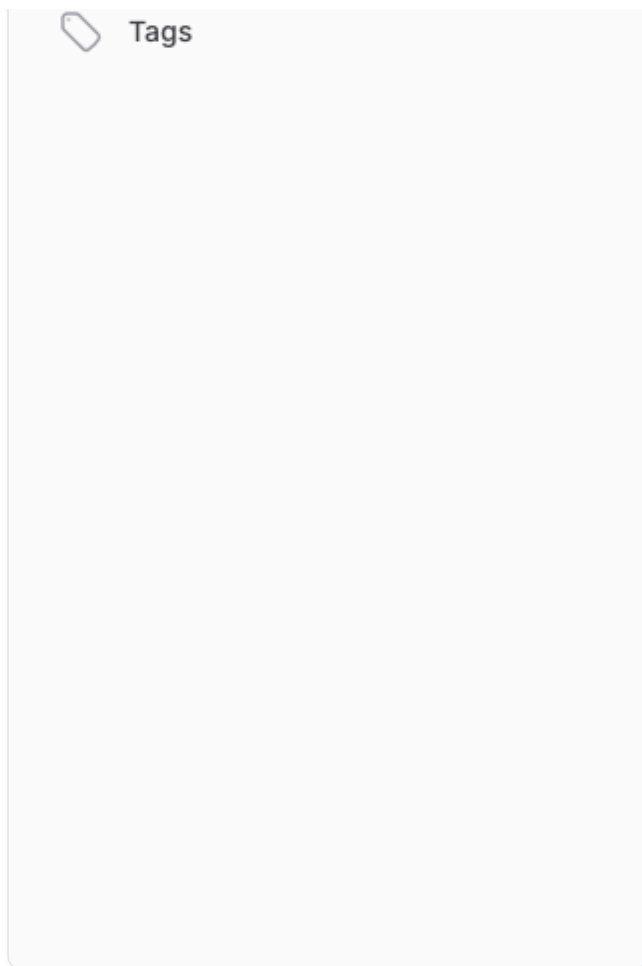
General

 Spaces

Settings

 Users

 Configurations



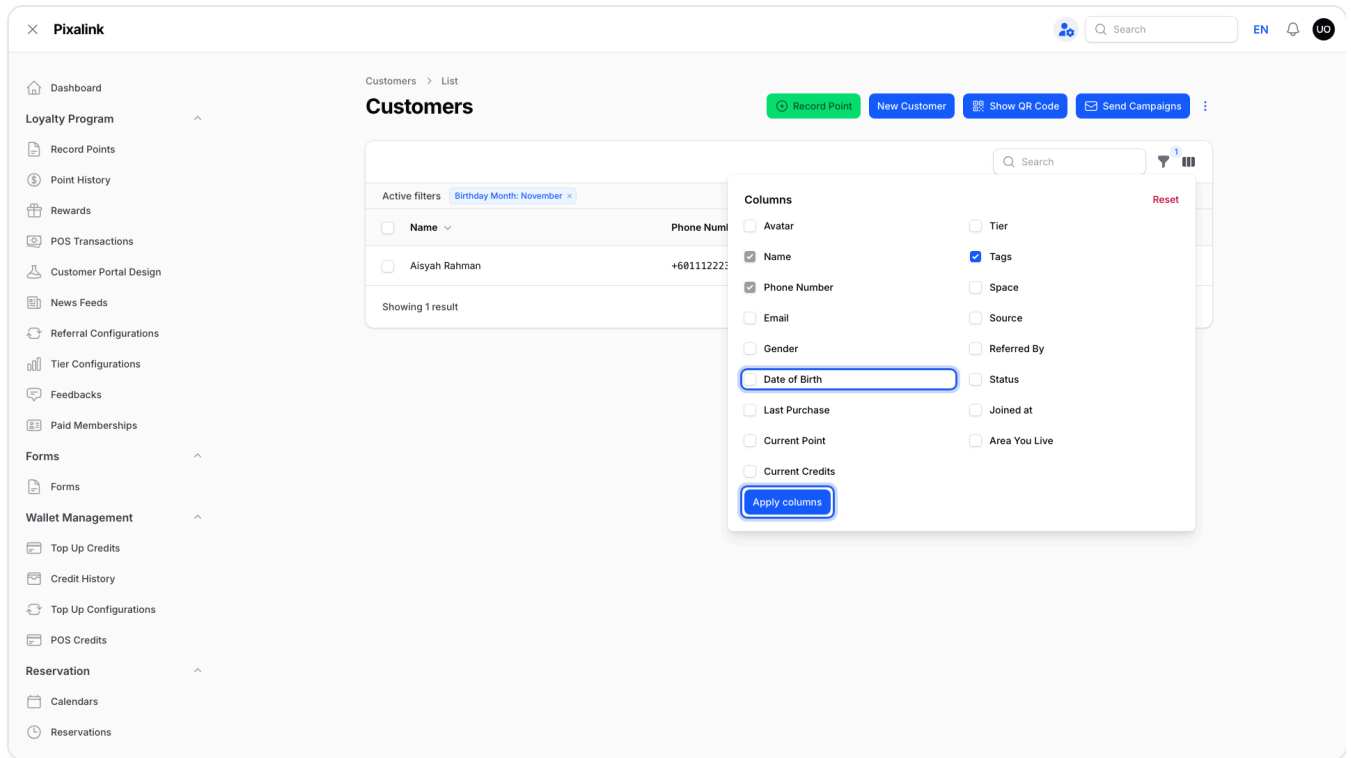
Customers sits under the CRM group in the sidebar.

2. Click the filter icon, choose next month in **Birthday Month**, then click **Apply filters**.

The screenshot shows the Pixalink CRM interface. On the left is a sidebar with various menu items. The main area displays a 'Filters' section with multiple dropdown menus and input fields. The 'Birthday Month' dropdown is highlighted with a blue border. At the bottom of the filters section, there is a blue 'Apply filters' button.

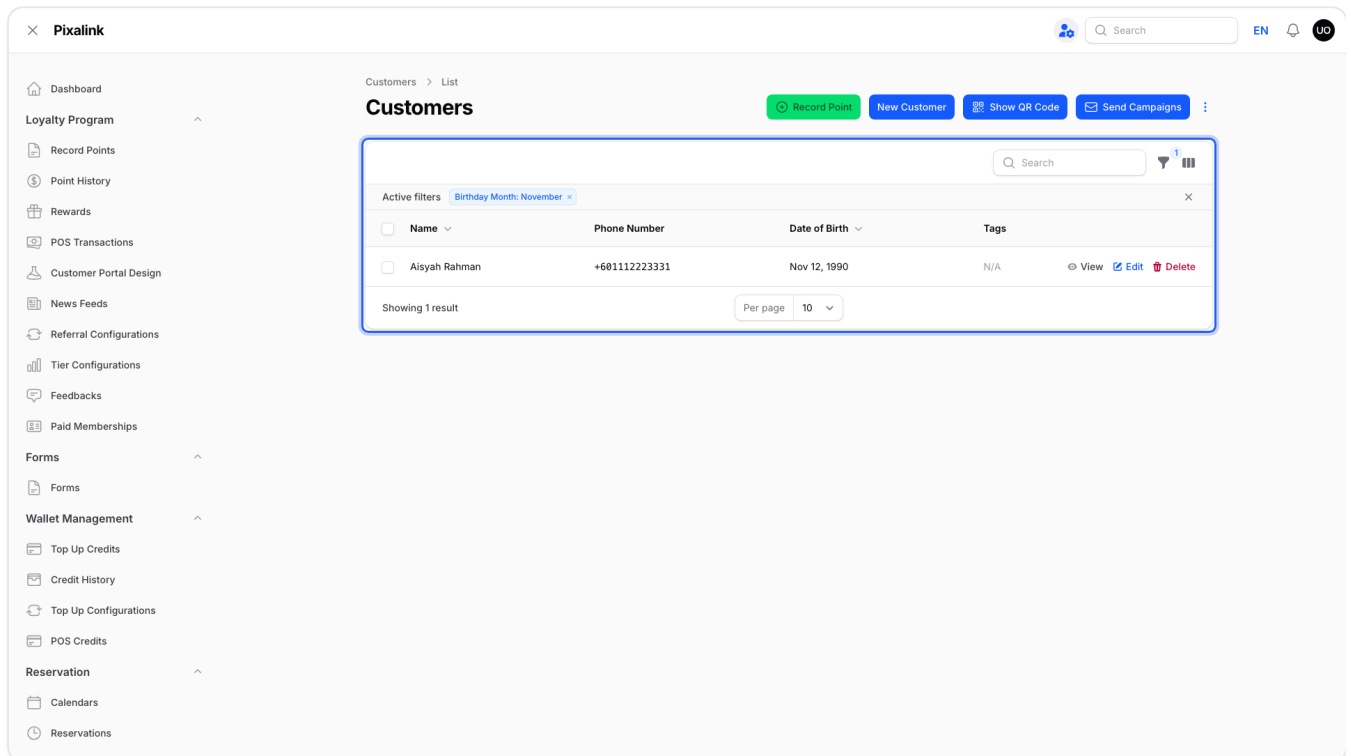
Birthday Month starts on All. Pick a single month, for example November.

3. Click the columns icon, tick **Date of Birth**, then click **Apply columns**.



Date of Birth is hidden by default. Pixalink remembers your choice until you log out.

4. Check the list to see each customer's exact birthday.



The Active filters bar shows Birthday Month: November. Hover a date to see the customer's age.

5. Click the three-dot menu at the top right and choose **Export Customers**.

× Pixalink

Customers > List

Customers

Record Point New Customer Show QR Code Send Campaigns

Active filters Birthday Month: November

Import from WhatsApp
Import from Reservation
Import Customers
Export Customers

☐	Name	Phone Number	Date of Birth	Tags	
☐	Aisyah Rahman	+681112223331	Nov 12, 1990	N/A	View Edit Delete

Showing 1 result

Per page 10

Export Customers is the last item in the menu.

6. Click **Export** to prepare the file in the background.



Phone Number



Gender



Date of Birth



Joined at



Source



Status



Current Points



Last Purchase



Space



Tags



Referred By (ID)



Referred By (Phone Number)



Referred By (Email)



Area You Live



Tier



Current Credits

Export

Cancel

Only customers matching your filter and search are exported. A download link appears under the bell icon when the file is ready.

What Your Customers Will See

Nothing. This list is only for you and team members who can view Customers. To greet customers automatically, set up a birthday campaign or a birthday voucher. A birthday campaign messages the customer. A birthday voucher can also alert your team on the day it's given, if you turn that on in the reward's notification settings. Neither one warns you ahead of time.

Good to Know

- Customers without a date of birth never appear under any month.
- The filter shows the whole month, not "the next 7 days". Check the Date of Birth column for exact days.
- The export includes Date of Birth by default, even if the column is hidden on screen.

Need Help?

Reach out to our support team. We're happy to help you get started.

What's Next?

- [How to Create a Birthday Campaign](https://kb.pixalink.io/articles/how-to-create-a-birthday-campaign) (https://kb.pixalink.io/articles/how-to-create-a-birthday-campaign)
- [Birthday Rewards: Automatically Reward Customers on Their Birthday](https://kb.pixalink.io/articles/birthday-rewards-automatically-reward-customers-on-their-birthday) (https://kb.pixalink.io/articles/birthday-rewards-automatically-reward-customers-on-their-birthday)
- [How to Export Customer Data](https://kb.pixalink.io/articles/how-to-export-customer-data) (https://kb.pixalink.io/articles/how-to-export-customer-data)