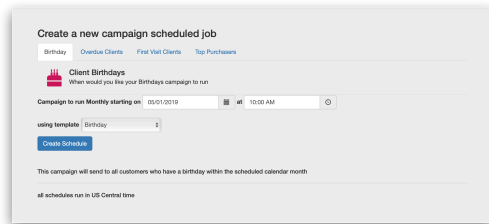


Use this guide to guide you through the set up pre-scheduled, automated campaigns. The Campaigns Scheduler is an easy, set-it-and-forget-it way to stay on top of marketing communications to your most valued clients.

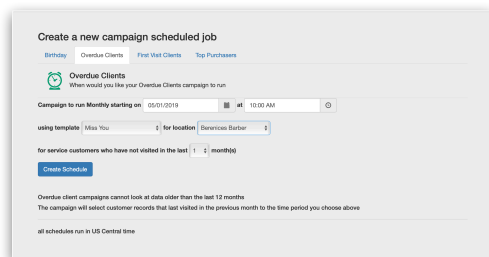
## Birthday

- From the Birthday scheduler tab, you can create automated emails that will be sent to your clients that have birthdays within the selected month.
  - Choose a date that you would like your campaign to start. If you choose the first day of the current month, your campaign will not start running until the first day of the following month. It will then run on the first day of every subsequent month.
  - Choose a time in which you would like your campaign to run. Your clients will receive their emails within a few minutes of your chosen time.
  - Choose an email template that you would like to use for the campaign. Please see our Email Templates guide if you need help!



## Overdue Clients

- From the Overdue Clients tab, you can create automated emails to clients that have not been back to the salon within a given number of months.
  - This campaign runs once per month, so choose a date that you wish the campaign to start. If you choose the first day of the current month, your campaign will not start running until the first day of the following month. It will then run on the first day of every subsequent month.
  - Choose a time in which you would like your campaign to run. Your client will receive their emails within a few minutes of your chosen time.
  - Choose an email template that you would like to use for the campaign.
  - Choose the number of months in which your client has not been back to the salon. You can choose between 1 and 11 months.
  - \* Since the campaign runs monthly and all clients may not book, some overdue clients may receive repeating emails once per month when the campaign runs.



**Create a new campaign scheduled job**

Birthdays Overdue Clients **First Visit Clients** Top Purchasers

**First Visit Clients**  
When would you like your First Visit Clients campaign to run

Campaign to run: Daily | starting on: 05/01/2019 | at: 10:00 AM

using template: First Visit Review | for location: Services Barber

for new customers who received their first service in the previous: 1 day | 2 week | 3 month

[Create Schedule](#)

all schedules run in US Central time

## First Visit Clients

- From the First Visit Clients tab, you can create automated emails to clients who have had their first visit at your salon within a specific number of days, weeks or months.
  - Choose whether you would like this campaign to run on a daily, weekly, or monthly basis. We will default the period of time in which your new customer had their visit based on your choice to days, weeks, or months.
  - Choose a date when you want your campaign to start. If you choose the first day of the current week or month, your campaign will not start running until the first day of the following week or month. It will then run on the first day of every subsequent week or month.
  - Choose a time in which you would like your campaign to run. Your client will receive their emails within a few minutes of your chosen time.
  - Choose an email template that you would like to use for the campaign.
  - Choose a location where you would like your campaign to run.

**Create a new campaign scheduled job**

Birthdays Overdue Clients First Visit Clients **Top Purchasers**

**Top Purchasers**  
When would you like your Top Purchasers campaign to run

Campaign to run: Weekly | starting on: 05/01/2019 | at: 10:00 AM

using template: Top Sponsor | for location: Services Barber | from the last: 2 week | 3 month

running campaign: Clients who have purchased at least \$500 worth of Products or Services

[Create Schedule](#)

all schedules run in US Central time

## Top Purchasers

- From the Top Purchasers tab, you can create automated emails to clients who have hit a specified goal (in dollars or quantity) for purchases (services and/or products) today, this week, or this month.
  - Choose whether you would like this campaign to run on a daily, weekly, or monthly basis. We will adjust the time period to days, weeks or months based on your choice.
  - Choose a date when you want your campaign to start. If you choose the first day of the current month, your campaign will not start running until the first day of the following month. It will then run on the first day of every subsequent month.
  - Choose a time in which you would like your campaign to run. Your client will receive their emails within a few minutes of your chosen time.
  - Choose an email template that you would like to use for the campaign.
  - Choose a location where you would like your campaign to run.
  - Choose your Top Purchasers campaign that you would like to run.

**My Scheduled Jobs**

#	Type	Template	Location	Repeated	Start Date	Run Time
1	Client Birthdays	Birthdays		Monthly	01st June 2019	03:15 pm
2	Overdue Clients	Miss You	Composition Studio South	Monthly	15th May 2019	03:20 pm
3	First Visit Clients	First Visit Clients	Composition Studio South	Daily	15th May 2019	03:25 pm
4	Overdue Clients	Overdue Clients	Composition Studio South	Monthly	15th May 2019	03:30 pm
5	Top Purchasers	Top Purchasers	Composition Studio - North	Daily	15th May 2019	03:30 pm
6	Top Purchasers	Top Purchasers	Composition Studio - North	Monthly	15th May 2019	01:20 pm
7	First Visit Clients	First Visit Clients	Composition Studio - North	Daily	15th May 2019	11:50 am
8	Overdue Clients	Miss You	Composition Studio - North	Monthly	15th May 2019	11:45 am
9	Top Purchasers	Top Purchasers	Composition Studio South	Daily	15th May 2019	03:20 pm

## My Scheduled Jobs

The My Scheduled Jobs section at the bottom of the scheduler lists all of the active jobs that are currently scheduled.

- Click the Details button on each job to view additional details about the job including when it was last run.
- Click the View button on each job to view a preview of the Template that you selected for the job.
- Click the trash can icon to delete the job and stop it from running.