

The Birthday Emailer



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Target Audience

This application was created for the following types of salesforce users:

Business Users:

- Insurance Agents
- Wealth Managers
- Anyone else who wants to add some polish to their relationships

Salesforce Administrators:

- Curious propeller heads and salesforce admins who want to see how this app was built, and to customize it further for their own use.



What is the Birthday Emailer?

Salesforce natively offers:

- Email templates
- Contact Birthdate tracking

But unlike other CRM systems and small business contact managers, it does not natively offer automatic birthday emails to contacts in the Contacts tab.

Now, with this AppExchange package, this functionality is available to the global salesforce audience



Package Components

The components of this package are the following

Code: There is an Apex class called BirthdayCronJob.

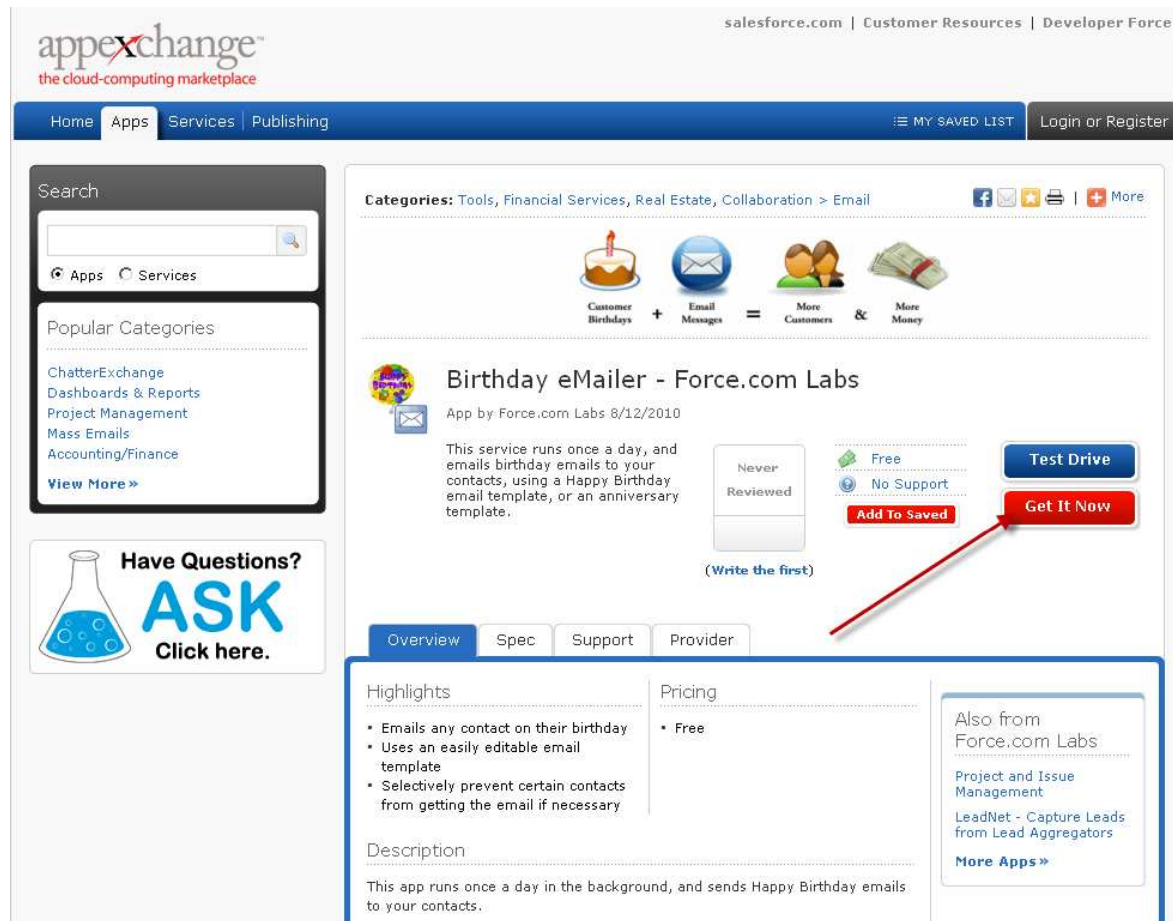
Email Templates: there are 2 email templates

You can edit these if you want to, but you don't need to

Configuration Instructions: The Apex class needs to be scheduled, from within the Setup menu (this document explains installation)



Installation & Setup



1) Click “Get It Now” from the AppExchange listing (left)

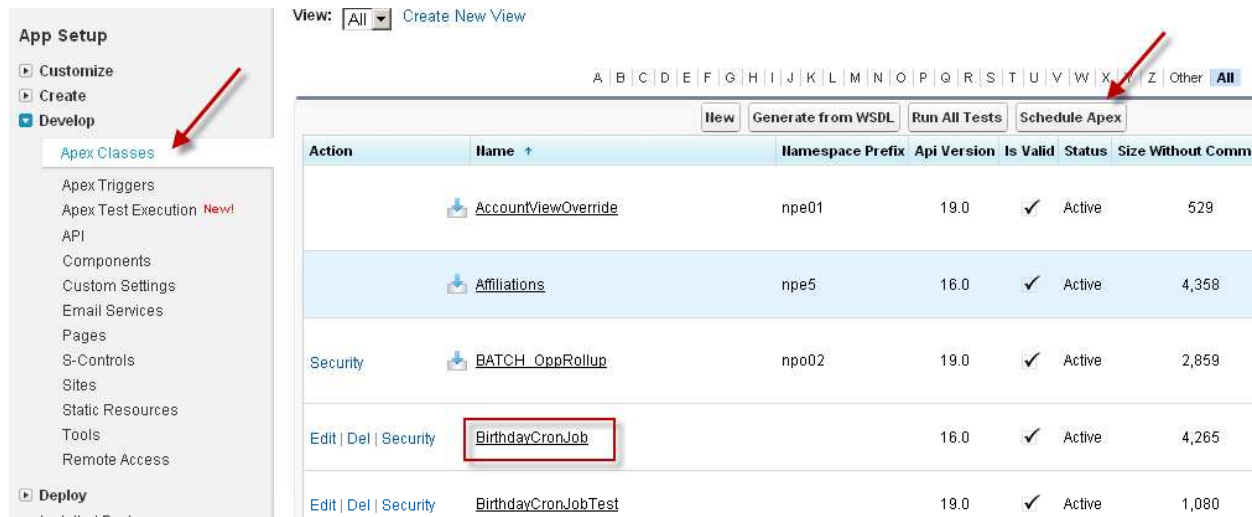
- Ignore Apex Errors
- Make the package available to all users

2) Then place 3 fields that are part of the package onto the Contact Page Layout (below): the 2 checkboxes, and the Anniversary Date

Birthdate	6/28/1974
Send Birthday Email	☒
Anniversary Date	6/28/2005
Send Anniversary Email	☒



Configuration...



App Setup

- Customize
- Create
- Develop
- Apex Classes
- Apex Triggers
- Apex Test Execution *New!*
- API
- Components
- Custom Settings
- Email Services
- Pages
- S-Controls
- Sites
- Static Resources
- Tools
- Remote Access
- Deploy

View: All Create New View

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

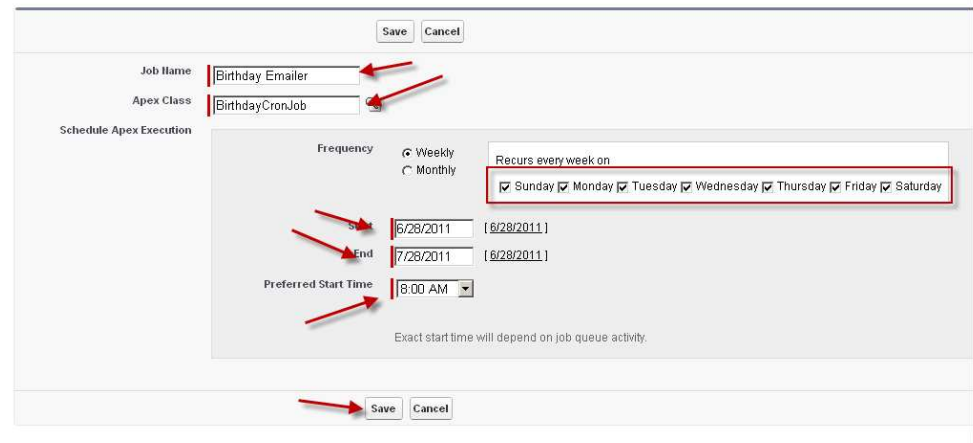
Action	Name ↑	Namespace Prefix	Api Version	Is Valid	Status	Size Without Comm
	AccountViewOverride	npe01	19.0	✓	Active	529
	Affiliations	npe5	16.0	✓	Active	4,358
Security	BATCH_OppRollup	np002	19.0	✓	Active	2,859
Edit Del Security	BirthdayCronJob		16.0	✓	Active	4,265
Edit Del Security	BirthdayCronJobTest		19.0	✓	Active	1,080

3) In the setup menu, go to the Apex Classes area, and click on “Schedule Apex”

Then, fill in the required fields, and click save. Make sure this job runs each day of the week.

Schedule Apex

Schedule an Apex class that implements the 'Schedulable' interface to be automatically executed on a weekly or monthly interval.



Save Cancel

Job Name

Apex Class

Schedule Apex Execution

Frequency ☒ Weekly ☐ Monthly

Recurs every week on

☒ Sunday ☒ Monday ☒ Tuesday ☒ Wednesday ☒ Thursday ☒ Friday ☒ Saturday

Start

End

Preferred Start Time

Exact start time will depend on job queue activity.

Save Cancel



Controlling the content and sending of emails

To prevent emails from being sent:
uncheck the “Send Birthday Email” or “Send Anniversary Email” on the contact record

Birthdate	6/28/1974
Send Birthday Email	☒
Anniversary Date	6/28/2005
Send Anniversary Email	☒

To change email templates

Point and Click Option: modify the provided email templates in the BirthdayEmailer_Templates folder, called:

- “Happy Birthday”
- and “Celebrating your Anniversary”

Programmer Option: change the Apex code to point to request a different email template

- Edit the class called BirthdayCronJob (either in your developer edition, or in your sandbox)
- Change the 2 lines of code to the right to be the names of the email templates you want to use

```
110 public void sendMail()
111 {
112     //define variables
113     String debugAddress = 'eyewell@salesforce.com';
114     String BirthdayEmailTemplateName = 'Happy Birthday';
115     String AnniversaryEmailTemplateName = 'Celebrating your Anniversary';
116     String debugMessage;
117     String[] toAddresses;
118
119     Integer DayOfEvent = date.today().day();
120     Integer MonthOfEvent = date.today().month();
121
122 }
```

