⏱️ 20 MIN SETUP

Automatic Customer Birthday Offers

Part of our Small Business Automation guide: what to automate first and the 10 easiest wins.

The problem

Birthday offers feel personal and bring customers back in, but sending them by hand never happens. Automate them for customers who opted in.

What you need

- Customer birthdays plus their marketing opt-in (in Google Sheets or your POS)
- Zapier or Make
- Gmail or Twilio

Setup with Zapier

1. Keep columns for name, email, birthday (month and day) and opt-in.
2. Create a Zap with **Schedule by Zapier** (every day).
3. Add **Google Sheets, Lookup Rows** to find today's birthdays where opt-in is yes.
4. Add **Gmail, Send Email** with the offer and an unsubscribe link.
5. Test it with your own birthday row, then turn it on.

Setup with Make

1. Run a daily schedule, then Search Rows with a date filter.
2. Add an iterator and an email step.
3. Turn it on.

Message template

> Happy birthday, [Name]! Enjoy [offer] at [Business] this week, on us. [Unsubscribe]

Consent and local rules

This is marketing. Only send to contacts who opted in, include an unsubscribe in every message, and stop as soon as someone opts out (TCPA and CAN-SPAM in the US, the Spam Act in Australia, PECR and GDPR in the UK and EU, CASL in Canada). This isn't legal advice.

FAQ

Can I pull birthdays from Square?

Yes, if you store birthdays on the customer record in Square. Otherwise, keep them in a Google Sheet alongside each customer's marketing opt-in. Either way, the automation only needs the month and day.

Should birthday offers go by SMS or email?

Either works, as long as the customer opted in to that channel. Email has room for a nice image and an unsubscribe link. If you text, include

your business name and “Reply STOP to opt out” in every message.

How do I collect birthdays without being creepy?

Ask for the month and day only, and say why you want it, such as a birthday treat. Make the field optional and keep the marketing opt-in as a separate tick box.

What if someone unsubscribes?

Mark them as opted out in your sheet or POS straight away, and the automation will skip them. Your daily lookup should only find rows where opt-in is yes.

Related

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- Social post scheduling from a spreadsheet
- Weekly sales summary email from Square
- Get it ready-made

Affiliate disclosure: some links earn us a commission at no extra cost to you.

One-page checklist: Customer birthday offers (opted-in only)

- ☐ Keep columns for name, email, birthday (month and day) and opt-in.
- ☐ Create a Zap with Schedule by Zapier (every day).
- ☐ Add Google Sheets, Lookup Rows to find today's birthdays where opt-in is yes.
- ☐ Add Gmail, Send Email with the offer and an unsubscribe link.
- ☐ Test it with your own birthday row, then turn it on.

Consent note: only message people who have contacted you or agreed to hear from you, and include a way to opt out. This isn't legal advice.

Full guide: https://www.automatequick.com/guides/customer-birthday-offers