Special Dates: Adding to Calendar and Sending Email

Keep your sphere in flow and in constant contact by using special dates like Birthdays, Anniversaries, and House-iversaries as regular touch-points. You can send emails or send a gift using Loop and Tie!

Adding Dates to your People

1. From your persons Profile card select **Edit** (see below, indicated by the read arrow).

	🛗 CALENDAR 🛛 🕊 GOALS	Find people
	Non Corporation	
TASHYA BALLARD	DETAILS NOTES HISTORY	
PROFILE	Phone	edit
Marketing Plan	mobile (685)581-3662	e.

2. Select the type of date from the drop down menu (see below),

OPLE - 🛗 CALENDAR 🖤 GO	DALS	(Find people	•
	O add address		
Instant Messagi	ng		
	O add instant message		
Relationships			
	• add relationship		
Dates			
	o_add date		
December 20 Cla	anniversary		
Personal Profile	house-iversary		
	Instant Messagi Relationships Dates Personal Profile	O add address Instant Messaging O add instant message Relationships Dates Personal Profile O add date birthday anniversary house-iversary	O add address Instant Messaging O add instant message Relationships Dates Personal Profile

3. Enter date.

Adding to Calendar

You can choose to automatically add all Special Dates to your calendar by setting this in your <u>Preferences</u> <u>menu</u>.

To add a specific date to your calendar:

- 1. Select your person's profile and scroll down to the **Dates** section.
- 2. Click on add to calendar.

Dates	
house-iversary Dec 15, 2015	• add to calendar

Sending Special Date Email

- 1. Select your person's profile and scroll down to the **Dates** section.
- 2. Click on Calendar icon next to the date for which you want to send an email (see below, indicated by red arrow).

				row) fro		/ 00
NOVEMBER 2016 S M T W T F	S (Introduction Novem	nika William's Birthday		÷	Today	Ŧ
80 31 1 2 3 4 6 7 8 9 10 11 13 14 15 16 17 18	5 12 8:15a D 19 15 min	Daily Stand-up			AW aika William's	
20 21 22 23 24 25 27 28 29 30 1 2	26 3 Fri, Novemb	per 10		Birthday		
	8:15a D 15 min	Daily Stand-up			11/09/2016	
show 🛙 Default calendar	Sat, Novem	ber 11		SAY H	APPY BIRTHDAY!	
🛛 Birthdays			No Events	SEND L	.OOP & TIE™ GIFT	
Anniversaries	Sun, Novem	ber 12		(CALL MOBILE	
			No Events	(9	28)822-7008	_
	Mon, Nover	nber 13		(9	54)565-2548	
	8:15a E 15 min	Daily Stand-up		(9	CALL WORK 28}822-7008	
	Tue, Novem	ber 14				
	8:15a D 15 min	Daily Stand-up				
	Wed, Nover	nber 15				
	8:15a D	Daily Stand-up				

4. Update/confirm email settings (see below).

🖀 DASHBOARD 🛛 🖉 PEOPLE -		Create house-iversary message
O DECEMBER 2015 O	Mon: December 14	To: a lacus.Etiam@urna.ca 🗸
S M T W T F S 29 30 1 2 3 4 5 6 7 8 9 10 11 12	No Events Tue, December 15	Message (b) Wishing you a happy anniversary on the purchase of your home. Here's to many more years of happy memories!
13 (12) 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 i 2	No Events Wed, December 16	preview Send options: C Send on house-liversary
show	No Events Thu, December 17	Send now
 Default calendar Birthdays Anniversaries 	4:00p Canceled: Sprintfest - Office Closed (BY) The	Your message will be sent on Dec 15, 2015
D House-iversaries	Fri, December 18 No Events	1
	Sat, December 19 No Events	SCHEDULE CANCEL

- a. Select appropriate email addressb. Update message
- c. Select to send immediately or on date of event.

5. Click Schedule.

Sending Special Date Gift

- 1. From the calendar, select the event, for which you would like to send a gift. (Circled in red below)
- 2. <u>Select Send Loop and Tie Gift (See red arrow below)</u>.



- 3. This will bring you to your Loop and Tie account.
 - a. If you have any issues with your Loop and Tie account, please contact the support team using the chat box (See below)

&	GIFT	→ CARD	→ REC	CIPIENT \rightarrow REVIEW \rightarrow PA	Ŷ			NEXT >>>>	
I want to give the \$50 - collection. Your recipient chooses their gift from the collection you select.									
				POP	ULAR HOME BATH TRAVEL	ACCESSORIES DRINK EAT	LIFESTYLE		
				$\langle \rangle$					
				SWIRLING DECANTER	WOOD MAGNETIC KNIFE RACK	SEASONINGS OF THE WORLD	BLEECKER LEATHER WALLET		
				ĪT		1995 F	~		
				DOUBLE EDGE SAFETY RAZOR	WAXED CANVAS DOPP	KARL WINTERS CANDLE	ALUMINUM COASTERS		
				- Bagg		Å			