

NUDGE ALL

WhatsApp Birthday Reminders

Setup, consent, automatic name mapping, delivery and yearly recurrence

USER GUIDE | SEPTEMBER 2026

Official product: Nudge All

Operator: PremiumAV Private Limited

Live help: <https://nudgeall.com/whatsapp-birthday-help.php>

1. What this feature does

Nudge All can send an approved WhatsApp birthday reminder through a connected official WhatsApp Cloud API provider. WhatsApp is optional. In-app, Push and Email remain independent.

Verified template	birthday_warm_en (English, Marketing, approved)
Recipient	The account's explicitly enabled E.164 WhatsApp number
Name source	The linked People/Family record

2. Setup in six steps

1

Sign in

Open Nudge All and go to Settings - Notification Settings.

2

Enter your number

Turn on WhatsApp reminders and enter your receiving number in E.164 format, for example +919876543210. Do not use spaces or a leading zero.

3

Give consent

Tick the WhatsApp consent box and save. A phone number alone does not authorize messaging.

4

Check Connected Channels

Official automatic delivery requires WhatsApp Business to show CONNECTED for this Nudge account.

5

Link the birthday person

In People & Family, save the person's real name and birthday. Link that Person when creating the Birthday reminder.

6

Choose WhatsApp

Select WhatsApp under Notify me by. The option stays disabled until phone, consent and provider checks pass.

3. Automatic person name

YES - the linked Person's name is automatic.

The text 'Nudge All QA' was synthetic test data only. For a real linked birthday, Nudge reads the current name from People/Family immediately before creating the template payload.

Template field	Automatic value
birthday_person_name	Linked Person name, for example Piyush Sharma
sender_name	Nudge account name; safe fallback is Nudge All

4. Birthday recurrence

One time sends only for the selected birthday occurrence. Every year keeps the birthday series active with no end date until the user explicitly stops it.

Done for this year completes only the current occurrence and stops Repeat Until Done notifications for that year. The next year's birthday remains scheduled.

Stop yearly reminder is the separate confirmed action that ends future occurrences.

For February 29 birthdays, Nudge uses February 28 in non-leap years and February 29 in leap years.

5. Consent, delivery and duplicate protection

WhatsApp reminders are OFF by default. Nudge requires the user to enable WhatsApp, provide a valid international number and record explicit consent. Opting out stops future WhatsApp attempts without disabling Push or Email.

Each Birthday occurrence and WhatsApp channel event has one stable idempotency key. If cron runs again, the same delivery is not created twice. Provider message IDs and channel status are recorded independently, so a WhatsApp failure never claims that Email or Push failed.

Meta may accept a template and later report DELIVERED, READ or FAILED through a webhook. A provider acceptance response is not the same as physical delivery.

6. Provider connection

Entering a receiving number does not create a WhatsApp Business sender. Automatic Cloud API delivery also requires a connected provider for that Nudge account. Nudge does not silently reuse another tenant's or the owner's private WhatsApp provider connection.

If Connected Channels shows NOT CONNECTED, contact hello@nudgeall.com. Customer self-service provider onboarding remains separate until the RobotSky tenant onboarding API is verified.

7. Hinglish quick instructions

Settings kholiye, WhatsApp reminders ON kijiye, apna number country code ke saath daliye aur consent tick karke Save kijiye. People/Family mein birthday person ka real naam aur birthday save karke reminder ko us Person se link kijiye. Provider CONNECTED hone par WhatsApp option active hoga. Message mein linked person ka naam automatic aayega. Normal Done sirf is saal ko complete karega; yearly series band karne ke liye Stop yearly reminder use kijiye.

Support and legal

Help: <https://nudgeall.com/whatsapp-birthday-help.php>

Support: hello@nudgeall.com

Privacy: <https://nudgeall.com/privacy.php>

Terms: <https://nudgeall.com/terms.php>

EULA: <https://nudgeall.com/eula.php>