

*Thankster*

## Get the App

Guide to Automatically Sending Cards Using

*Thankster* 

+

**wishpond**

For any assistance with set-up, feel free to email us at [support@thankster.com](mailto:support@thankster.com)

## SUMMARY

There is nothing to install in order to utilize Thankster from within a wishpond campaign. It's basically a 2 step process that you do **one** time:

[Step 1 - Create a Thankster Project](#)

[Step 2 - Add Custom Lead Properties in Wishpond](#)

[Step 3 - Create Email Template in Wishpond](#)

[Step 4 - Create Workflow in Wishpond](#)

That's it! Then every time that Workflow runs in wishpond, the contacts it runs on will get a handwritten card in the mail tailored to them.

Note: there is more detail in this guide here than most of you will need.

## Step 1 - Create a Project in Thankster

Create or edit a card project in [Thankster.com](https://www.thankster.com) (set up a free account). This project will serve as a template in wishpond.

1a - [Select a cover design](#). Thankster cards are folder cards, printed on premium paper.

1b - Then [select the specific card](#)

1c - Or create [your own cover design](#)

1d - [Write you card](#) with natural handwriting

1e - [Merge fields](#) in Thankster

## Step 1a

### Select a Cover Design

In Thankster - After you create a project the first thing you do is select a cover design. Thankster cards are folder cards, printed on premium paper.

The screenshot shows the Thankster website interface during the 'STEP 1 Select Card' phase. The top navigation bar includes the Thankster logo, 'Gratitude Delivered', and links for 'Projects', 'Pricing', 'Integrations', and 'Create Cover'. A dark header on the right shows a shopping cart icon with '\$2.00' and a 'Cart' button. Below the navigation, three steps are indicated: 'STEP 1 Select Card' (active), 'STEP 2 Write Cards', and 'STEP 3 Checkout'. A message on the right says 'You Can Return To This Step Later And Change Your Card'. The main content area features a search bar with 'Search Cards' and a 'Search' button, and a dropdown menu set to 'Sort cards by default'. A 'Browse by Category' section lists various card types under 'Thank You Cards', including 'General Thank You Cards Classic', 'Birthday Thank You', 'Heart & Flowers', 'Bachelorette Thank You', 'Bridal Shower Thank You', 'Wedding Thank You's', 'Baby / Baby Shower Thank You', 'Kids Thank You's', 'Bar / Bat Mitzvah Thank You', 'Graduation Thank You', 'Religious-themed Thank You', 'Business Thank You's', 'Sympathy Thank You's', and 'Other Thank You Cards'. Below this are sections for 'Birthday Cards', 'Occasion Cards', 'Holiday Cards', 'Just Because', 'Designers', and 'My Cards'. The main display area shows a grid of nine card designs with their titles and prices: 'Humming Bird Lily | \$2.49', 'WARBLER AND SUNSHINE | \$2.49', 'LITTLE ROBIN | \$2.49', 'The Notebook | \$2.49', 'FIREFLIES AND BIG DIPPER | \$2.49', 'Sunshine Days | \$2.49', 'MORNING DOVE IN SNOW | \$2.49', 'Flowing Flowers | \$2.49', and 'BUMBLE BEE | \$2.49'. At the bottom, there are navigation buttons: '« First', '« Prev', 'Page 1 of 13', 'Next »', and 'Last »'.

## Step 1b

### Select a Specific Card

In Thankster - We have many pre-made cards.

The screenshot displays the Thankster website interface during the 'Select a Specific Card' step. The top navigation bar includes the Thankster logo, 'Gratitude Delivered', and links for 'Projects', 'Pricing', 'Integrations', and 'Create Cover'. On the right, it shows 'Easy Handwritten Greeting Cards', a price of '\$2.00', and a 'Cart' icon. The main content area features a progress bar with three steps: 'STEP 1 Select Card' (active), 'STEP 2 Write Cards', and 'STEP 3 Checkout'. A message states, 'You Can Return To This Step Later And Change Your Card'. Below the progress bar, there is a search bar with 'Search Cards' and a 'Search' button, and a dropdown menu for 'Sort cards by default'. The 'Browse by Category' section lists: 'Thank You Cards' (highlighted), 'Birthday Cards', 'Occasion Cards', 'Holiday Cards', 'Just Because', 'Designers', and 'My Cards'. The main card preview shows a white card with the text 'Thank You' in a large, elegant script font. Below the preview are tabs for 'Front', 'Inside', and 'Back'. To the right of the preview are buttons for 'Choose a Different Card' and 'Choose This Card'. A 'Card Details' sidebar on the right lists: Name: Large Script; Width: 5.500 inches; Height: 4.250 inches; Weight: 110 lb. cover; Item Number: LB05A2113PGEN12; Min Quantity: No. A link for 'See Volume Pricing' is at the bottom of the sidebar.

## Step 1c

### Or Create Your Own Cover

In Thankster - Or, you can create your own cover with your company's logo or other imagery by clicking "Create Cover" in the top navigation bar.

The screenshot shows the Thankster web interface. At the top, the navigation bar includes 'Projects', 'Pricing', 'Integrations', and 'Create Cover'. A red box highlights the 'Create Your Own Card' button, with a red arrow pointing to it from the 'Create Cover' link. Below the navigation bar, the page title is 'My Account: My Cards'. On the left, a sidebar menu lists various account options, with 'My Cards' highlighted. The main content area displays a 'THANK YOU' card template featuring a tree with colorful ornaments. To the right of the card is a configuration panel with sections for 'File', 'Name', 'Orientation', 'Size', and 'Position'. The 'File' section shows a 'Choose File' button and the filename 'LB15\_A2\_11...x1584.jpg'. The 'Name' section has a 'Card Name' input field. The 'Orientation' section has a dropdown menu set to 'Portrait'. The 'Size' section has two sliders, both set to 100%, with 'Reset' buttons. The 'Position' section has 'X' and 'Y' input fields with 'Reset' buttons, showing values of 1 and -1 respectively. A 'Save Card' button is located at the bottom right of the page.

## Step 1d

### NOTE - A First Name is Required

In Thankster - Before you can proceed to create your message, you will be asked to enter a first name, even though all recipient data will come from ActiveDemand.

You can type anything here.

STEP 1 Select Card

STEP 2 Write Cards

STEP 3 Checkout

Next Step

Card Inside Page 2

Who is This Card Going To?

**Required**

First Name

**Optional - can add later directly on envelope**

Last Name

Company

Address 1

Address 2

City

Country

State / Province

Zip / Postal Code

Email

Submit Submit and add another Import

## Step 1d (cont'd)

### Write and Style Your Card

In Thankster - Write your card in natural handwriting. You can change various features of the message by clicking on the pencil icon next to font size.

For example, you can change the font color, or the angle of the text on the page. You do not need to highlight any text before applying a feature - changes will apply to the whole page (the other inside page can have its own settings). We do this because people generally write uniformly.

The screenshot shows the Thankster web interface. At the top, there's a navigation bar with 'Thankster Gratitude Delivered' on the left and 'Projects', 'Pricing', 'Integrations', 'Create Cover', and 'Easy Handwritten Greeting Cards' on the right. Below this is a progress bar with three steps: 'STEP 1 Select Card', 'STEP 2 Write Cards' (which is active), and 'STEP 3 Checkout'. A 'Next Step' button is also present. Under the progress bar, there are several icons: 'Card Inside', 'Page 2', 'Americana', '16' (font size), a pencil icon, a QR code, and 'Print Preview'. A red arrow points from the text in the first paragraph to the pencil icon next to the font size '16'. Below the progress bar is a large white card with a light blue border and a drop shadow. The card contains the following text in a handwritten font: 'Dear {first\_name\*},', 'Thank you so much for recent purchase.', 'You've been a great customer. Please let me know if you need anything at all.', 'Thanks again!', 'Alice', and 'Your grateful salesperson'.



## ....Step 1d (cont'd)

You can also select from one of our existing fonts, or create your own (contact us for the latter).

Click **Print Preview** and carefully inspect your card and envelope. Be sure you allow enough room at the bottom of your message so that no text gets cut off. Bear in mind that small things that vary, such as merge fields or character variation, can push a message over even if it appears to fit. So allow a little extra room.



Click the light bulb icon to see our sample text library, and click on one to insert it.

If you need more room, you can click on the other inside page of the card and type there. Each page can have a different font and styles.

## Step 2 - Add Custom Lead Properties in Wishpond



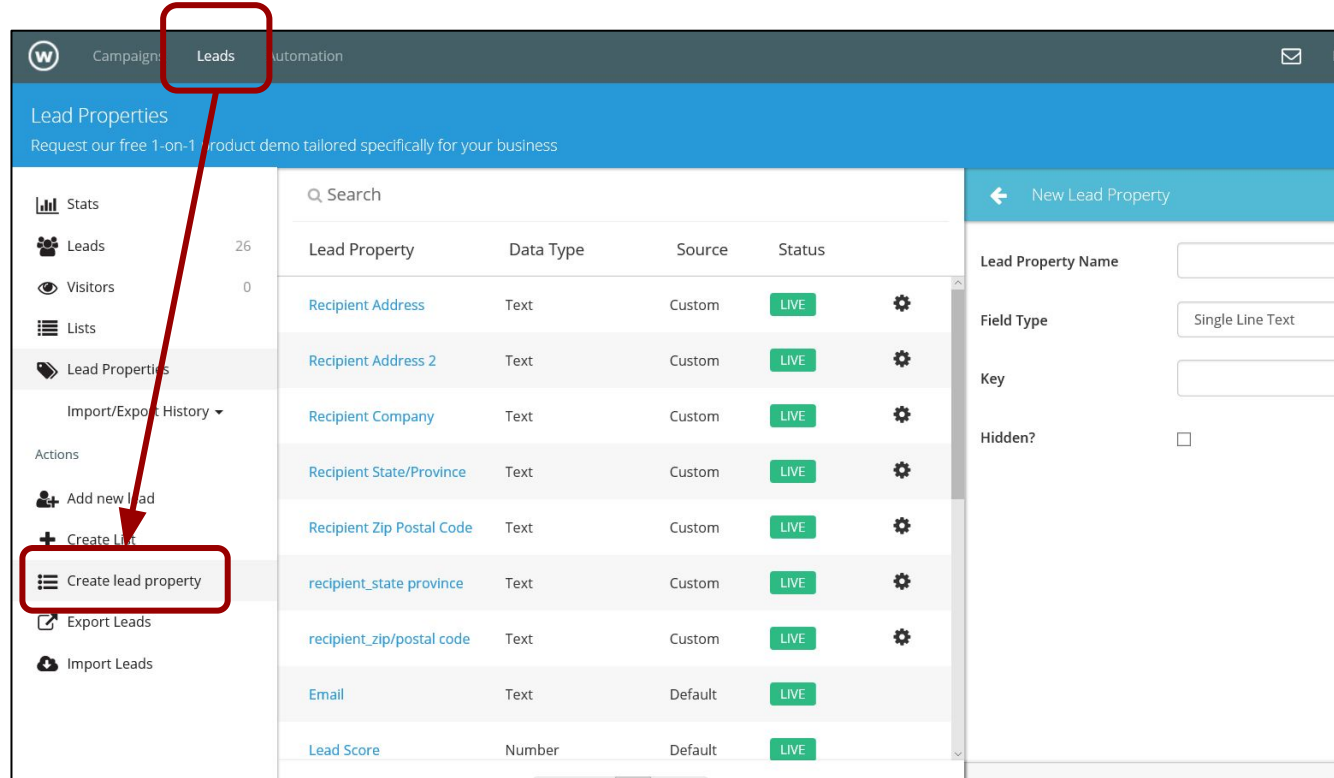
## Step 2

### Add Custom Lead Properties

In Wishpond - Under “Leads” > ” Create Lead Property”, copy and paste the following new lead properties:

“recipient\_address”  
“recipient\_state\_province”  
“recipient\_address\_2”  
“recipient\_zip\_postal\_code”

Contacts will need these properties in order to receive a card.



Leads automation

### Lead Properties

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Stats  
Leads 26  
Visitors 0  
Lists  
Lead Properties  
Import/Export History  
Actions  
Add new Lead  
Create List  
Create lead property  
Export Leads  
Import Leads

Search

Lead Property	Data Type	Source	Status
Recipient Address	Text	Custom	LIVE
Recipient Address 2	Text	Custom	LIVE
Recipient Company	Text	Custom	LIVE
Recipient State/Province	Text	Custom	LIVE
Recipient Zip Postal Code	Text	Custom	LIVE
recipient_state_province	Text	Custom	LIVE
recipient_zip/postal code	Text	Custom	LIVE
Email	Text	Default	LIVE
Lead Score	Number	Default	LIVE

New Lead Property

Lead Property Name

Field Type: Single Line Text

Key

Hidden?

## Step 3 - Create Email Template in Wishpond





## Step 3

### Create Email Template

In Wishpond - Under “Automation”, click “Email” (the green button). Fill in the boxes but make sure the subject line says “Mail Thankster Card”. Hit “Next”.

On the templates page, scroll to the bottom of the screen and click on “Use the old HTML editor” (small text at the bottom right). You’ll then need to copy and paste a template into the box (next page).

The image shows two screenshots from the Wishpond interface. The top-left screenshot shows the 'Automation' page with a table of workflows. A red box highlights the 'Email' button in the 'Create a new' section. A red arrow points from this button to the 'Email Subject' field in the top-right screenshot, which contains the text 'Mail Thankster Card'. Another red arrow points from this field to the 'Use the old HTML editor' button at the bottom right of the 'Choose Template' page. The 'Choose Template' page displays several email templates with 'Choose Template' buttons. The bottom right of the page has a small text link 'Use the old HTML editor' and a 'LEAVE US A MESSAGE!' button.

Name	Status	Leads
Standard Workflow	DRAFT	0
6/13 Andrew Test	INACTIVE	1
Standard Workflow - Test Wishpond	INACTIVE	0
6/6 Final Test for Today -Andrew	INACTIVE	1
Andrew testing workflow	INACTIVE	3
Testing Type Workflow -Andrew (2)	DRAFT	0

Choose Template

- Green, White, Grey
- Light Blue, White, Grey
- Light Blue, White, Ocean
- Light, Grey, Orange, Spring
- Light, Teal, Spring
- Soft Red, White, Grey
- Teal, White, Grey

Use the old HTML editor

LEAVE US A MESSAGE!



## Step 3 (Cont'd)

### Create Email Template

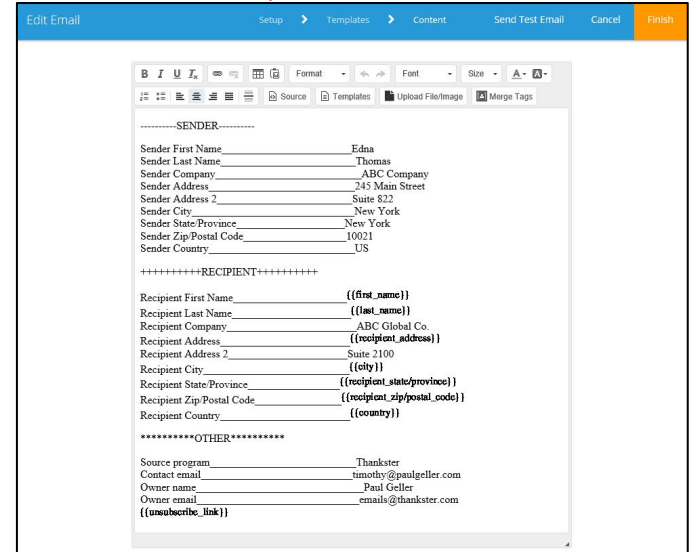
Copy and paste the text from this [link \(https://docs.google.com/document/d/1gB9oPVkae4CHEi4BzmSoKkAPZqocs\\_5wfrRpPRQn4B7Q/edit\)](https://docs.google.com/document/d/1gB9oPVkae4CHEi4BzmSoKkAPZqocs_5wfrRpPRQn4B7Q/edit) to the editor (you can leave the unsubscribe link in the editor).

You'll need to change just the example text on the right (see next page for more detail).

Click finish.

Copy

```
-----SENDER-----
Sender First Name_____Edna
Sender Last Name_____Thomas
Sender Company_____ABC Company
Sender Address_____245 Main Street
Sender Address 2_____Suite 822
Sender City_____New York
Sender State/Province_____New York
Sender Zip/Postal Code_____10021
Sender Country_____US
+++++++RECIPIENT+++++++
Recipient First Name_____{{first_name}}
Recipient Last Name_____{{last_name}}
Recipient Company_____{{company}}
Recipient Address_____{{recipient_address}}
Recipient Address 2_____{{recipient_address_2}}
Recipient City_____{{city}}
Recipient State/Province_____
{{Recipient_State_Province}}
Recipient Zip/Postal Code_____{{Recipient_Zip_Postal
Code}}
Recipient Country_____{{country}}
*****OTHER*****
Source program_____Thankster
Contact email_____timothy@paulgeller.com
Owner name_____Paul Geller
Owner email_____emails@thankster.com
```





-----SENDER-----

Sender First Name \_\_\_\_\_ Edna  
Sender Last Name \_\_\_\_\_ Thomas  
Sender Company \_\_\_\_\_ ABC Company  
Sender Address \_\_\_\_\_ 245 Main Street  
Sender Address 2 \_\_\_\_\_ Suite 822  
Sender City \_\_\_\_\_ New York  
Sender State/Province \_\_\_\_\_ New York  
Sender Zip/Postal Code \_\_\_\_\_ 10021  
Sender Country \_\_\_\_\_ US

Edit this section with your own info.

+++++++RECIPIENT+++++++

Recipient First Name \_\_\_\_\_ {{first\_name}}  
Recipient Last Name \_\_\_\_\_ {{last\_name}}  
Recipient Company \_\_\_\_\_ {{company}}  
Recipient Address \_\_\_\_\_ {recipient\_address}  
Recipient Address 2 \_\_\_\_\_ {{recipient\_address\_2}}  
Recipient City \_\_\_\_\_ {{city}}  
Recipient State/Province \_\_\_\_\_ {{Recipient\_State\_Province}}  
Recipient Zip/Postal Code \_\_\_\_\_ {{Recipient\_Zip\_Postal Code}}  
Recipient Country \_\_\_\_\_ {{country}}

This is where you'll be pulling in the right info for a card to be sent out.

\*\*\*\*\*OTHER\*\*\*\*\*

Source program \_\_\_\_\_ Thankster  
Contact email \_\_\_\_\_ timothy@paulgeller.com  
Owner name \_\_\_\_\_ Paul Geller  
Owner email \_\_\_\_\_ emails@thankster.com

Edit this section with your own info.

## Step 4 - Create Workflow in Wishpond

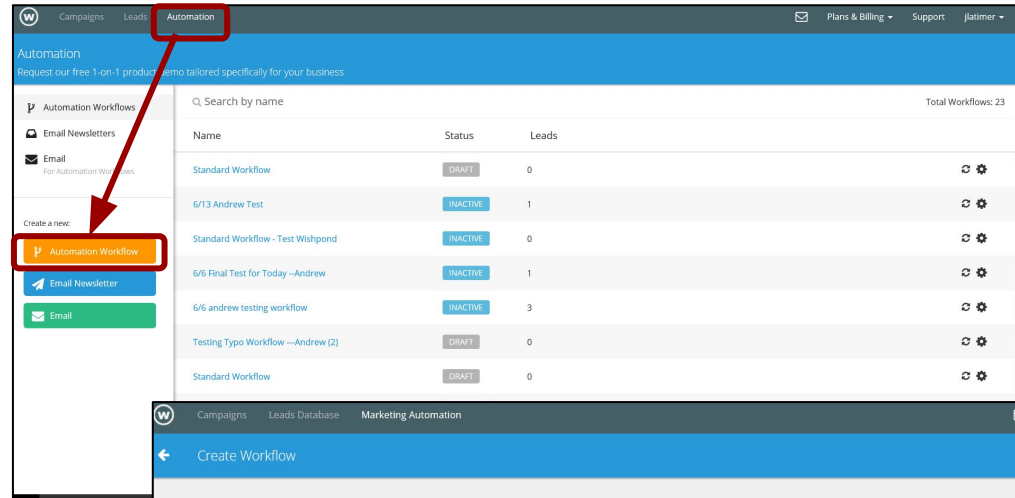




## Step 4 (cont'd)

### Create Workflow

In Wishpond - Under “Automation”, click the orange button that says “Automation Workflow”. Click on the type of workflow you want.



Automation

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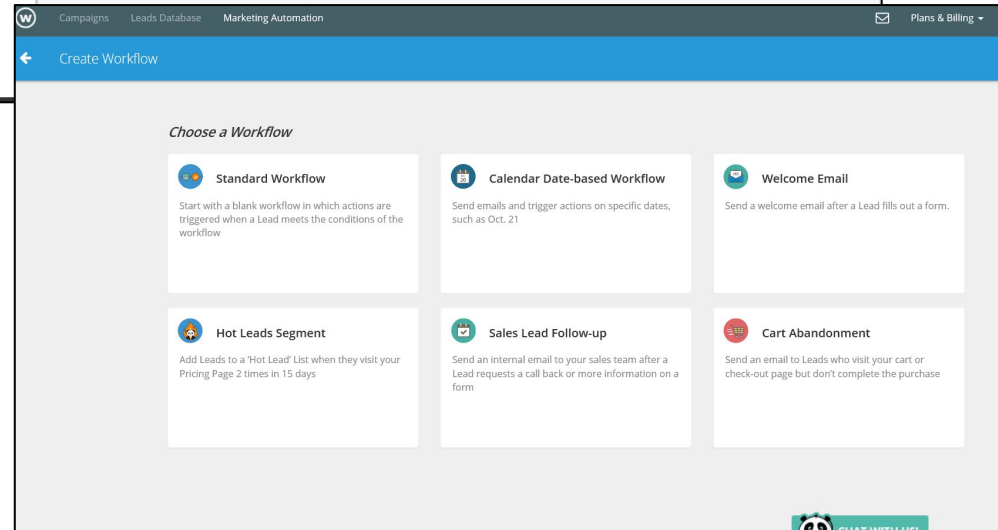
Automation Workflows

Search by name Total Workflows: 23

Name	Status	Leads	
Standard Workflow	DRAFT	0	⚙️
6/13 Andrew Test	INACTIVE	1	⚙️
Standard Workflow - Test Wishpond	INACTIVE	0	⚙️
6/6 Final Test for Today--Andrew	INACTIVE	1	⚙️
6/6 andrew testing workflow	INACTIVE	3	⚙️
Testing Typo Workflow --Andrew (2)	DRAFT	0	⚙️
Standard Workflow	DRAFT	0	⚙️

Create a new:

- Automation Workflow
- Email Newsletter
- Email



Create Workflow

Choose a Workflow

- Standard Workflow**  
Start with a blank workflow in which actions are triggered when a Lead meets the conditions of the workflow
- Calendar Date-based Workflow**  
Send emails and trigger actions on specific dates, such as Oct. 21
- Welcome Email**  
Send a welcome email after a Lead fills out a form.
- Hot Leads Segment**  
Add Leads to a 'Hot Lead' List when they visit your Pricing Page 2 times in 15 days
- Sales Lead Follow-up**  
Send an internal email to your sales team after a Lead requests a call back or more information on a form
- Cart Abandonment**  
Send an email to Leads who visit your cart or check-out page but don't complete the purchase

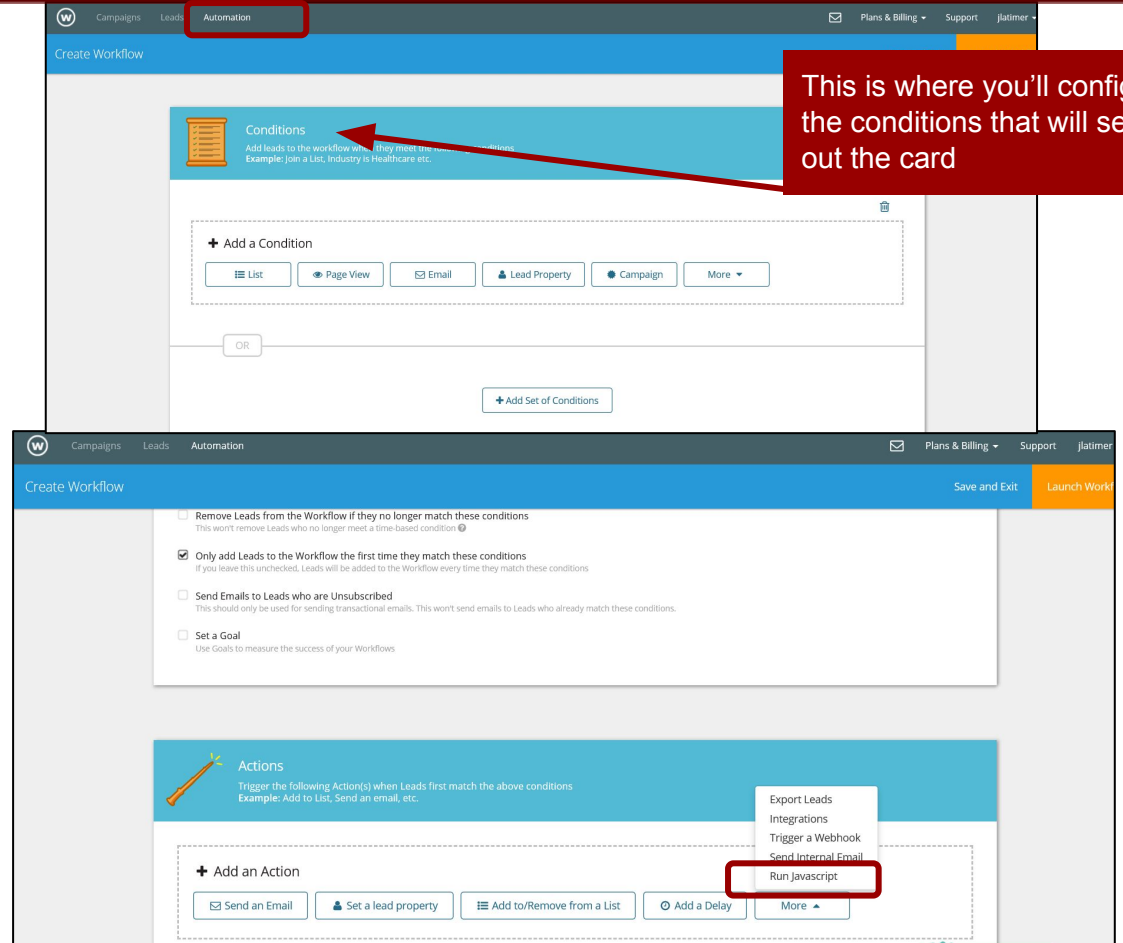
FLAT WITH US

## Step 4 (cont'd)

### Create Workflow

Under “Conditions”, create the condition that you want contacts to receive a card for (the conditions table under some of the workflow types might look different).

Under “Actions”, go to “More” > “Send Internal Email”.



The screenshot displays the 'Create Workflow' interface in the Wishpond dashboard. The 'Automation' tab is selected in the top navigation bar. The 'Conditions' section is highlighted with a red box, and a red arrow points to it from a text box on the right. The 'Conditions' section includes a sub-header 'Conditions' with a description: 'Add leads to the workflow when they meet the conditions. Example: Join a List, Industry is Healthcare etc.' Below this is a '+ Add a Condition' section with buttons for 'List', 'Page View', 'Email', 'Lead Property', 'Campaign', and 'More'. An 'OR' separator is visible below the buttons. At the bottom of the 'Conditions' section is a '+ Add Set of Conditions' button.

The 'Actions' section is also visible, with a sub-header 'Actions' and a description: 'Trigger the following Action(s) when Leads first match the above conditions. Example: Add to List, Send an email, etc.' Below this is a '+ Add an Action' section with buttons for 'Send an Email', 'Set a lead property', 'Add to/Remove from a List', 'Add a Delay', and 'More'. A dropdown menu is open from the 'More' button, showing options: 'Export Leads', 'Integrations', 'Trigger a Webhook', 'Send Internal Email', and 'Run Javascript'. The 'Run Javascript' option is highlighted with a red box.

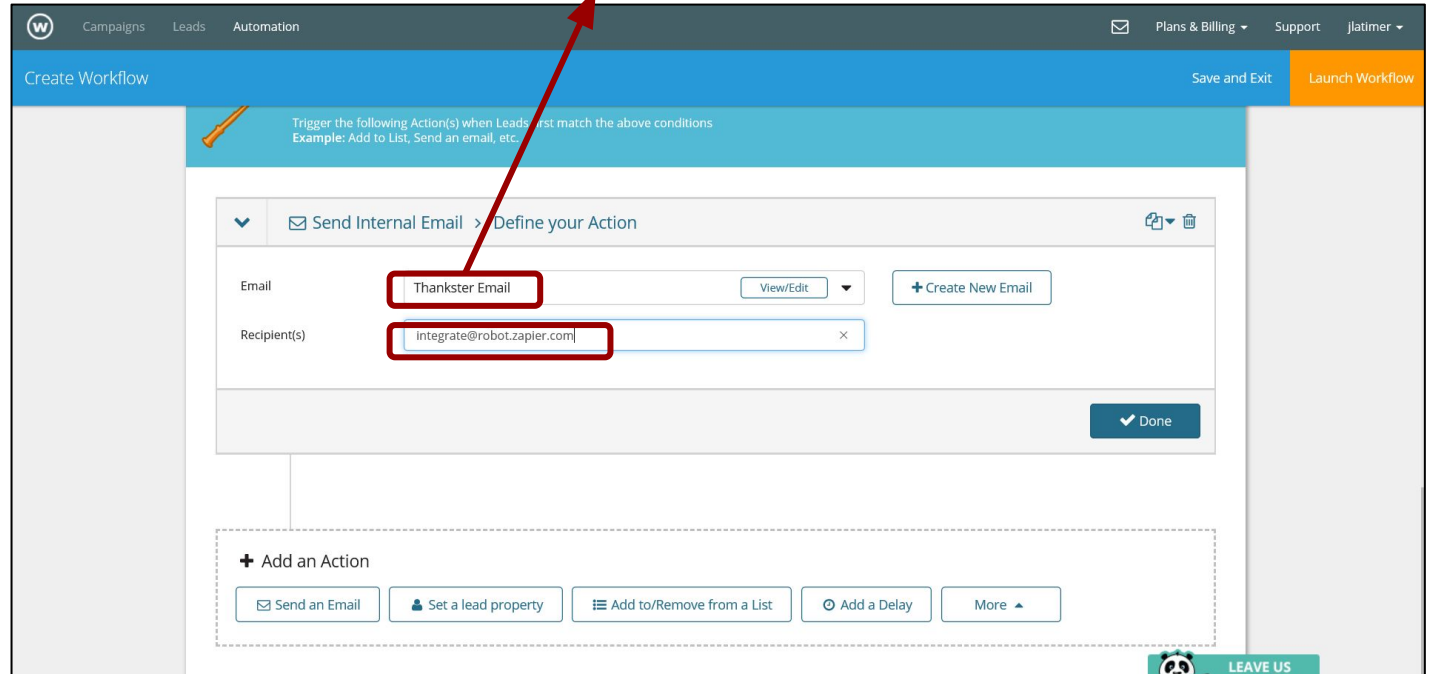
A red text box on the right side of the screenshot contains the text: 'This is where you'll configure the conditions that will sent out the card'.

## Step 4 (cont'd)

Choose the email you just added and type ["integrate@robot.zapier.com"](mailto:integrate@robot.zapier.com) under "Recipient(s)".

Next, hit "Launch Workflow".

Choose the email template that you added in the last step here.



The screenshot displays the 'Define your Action' configuration for a 'Send Internal Email' step. The 'Email' field is set to 'Thankster Email' and the 'Recipient(s)' field is set to 'integrate@robot.zapier.com'. A red box highlights the 'Thankster Email' field, and a red arrow points from a text box above to this field. Below the configuration fields is a 'Done' button. At the bottom, there is a section for '+ Add an Action' with buttons for 'Send an Email', 'Set a lead property', 'Add to/Remove from a List', 'Add a Delay', and 'More'.

## All Set!

Now whenever contacts meet the conditions, they will be sent a handwritten card in the mail! Remember that contacts will need the following properties to receive a card:

{{first\_name}}

{{last\_name}}

{{company}}

{{recipient\_address}}

{{recipient\_address\_2}}

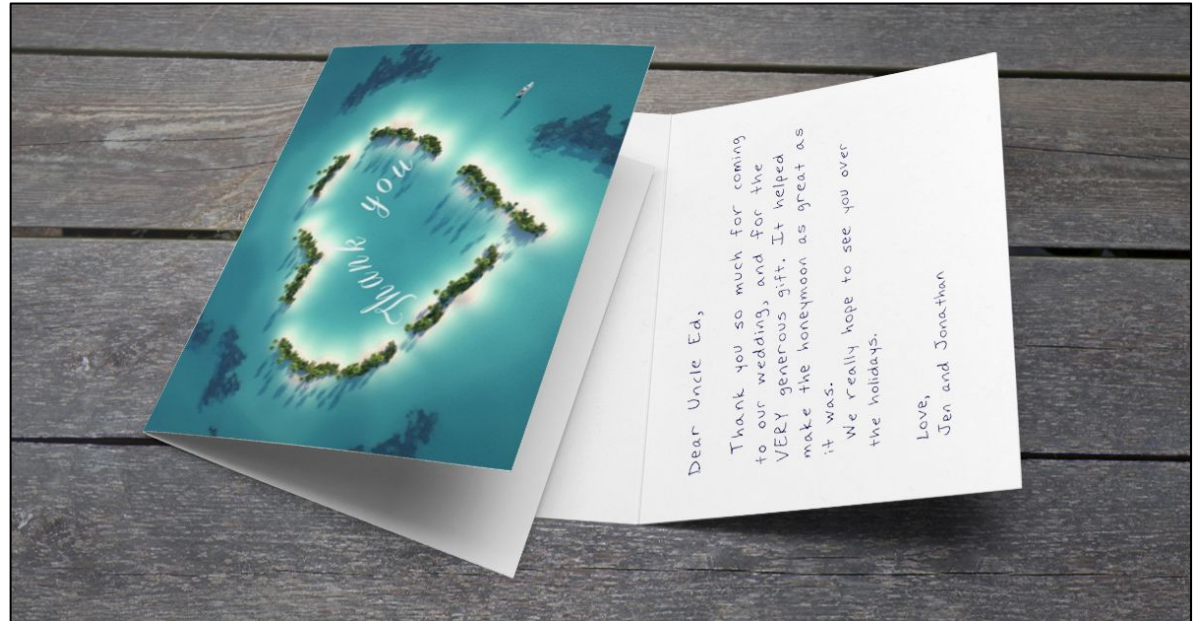
{{city}}

{{Recipient\_State\_Province}}

{{Recipient\_Zip\_Postal Code}}

{{country}}

## **Result - Automatically Mailed Personalized, Handwritten Cards....**



## Hooray!

- Cards will now go out automatically using your Thankster template(s) whenever a contact meets the right conditions.
- You can have as many templates in as many campaigns, using as many styles, handwritings, messages, and merge fields as you want.
- The cards will look authentically handwritten, with a first class stamp, leading to very high open rates, ROI, and goodwill!
- For any assistance, feel free to email us at [support@thankster.com](mailto:support@thankster.com).

