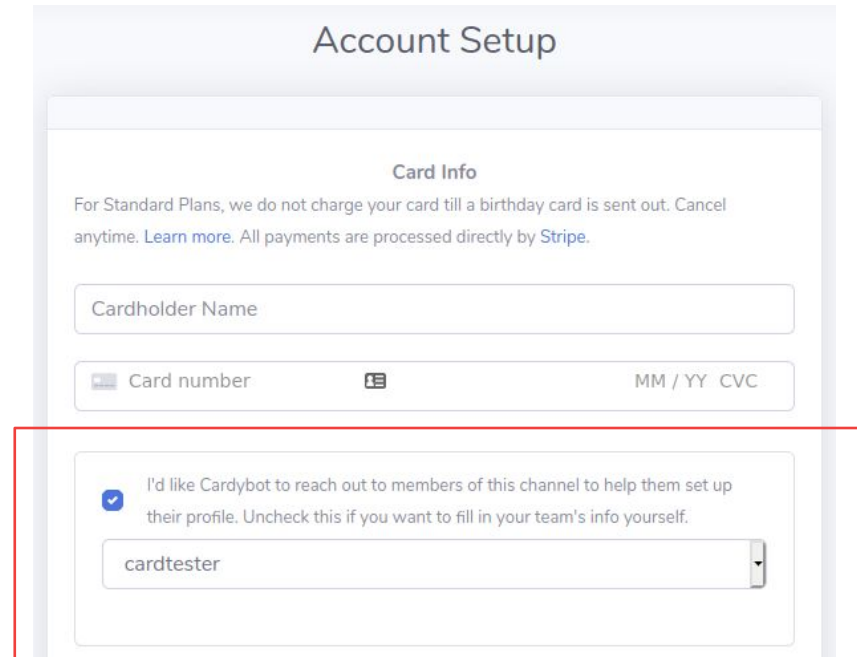


How Cardybot Works

Cardybot

Select a Setup Method

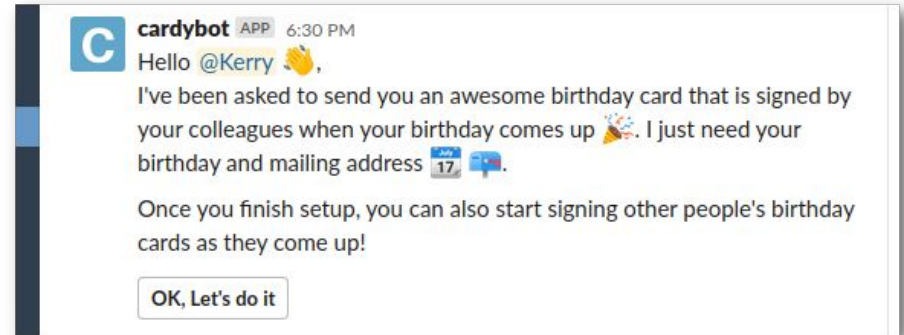
- Once you add Cardybot to Slack, you can select a Slack channel where all your co-workers are and Cardybot will reach out to its members to setup their profile.
- Alternatively, you can choose to add each user manually. In this case, Cardybot will not reach out.
- *Note: Cardybot includes filtering options so employees can decide to only be notified about birthdays for their department. Admins can also set this up for their team.*



The screenshot displays the 'Account Setup' interface. At the top, it says 'Account Setup'. Below that is a section titled 'Card Info' with a sub-header. The text reads: 'For Standard Plans, we do not charge your card till a birthday card is sent out. Cancel anytime. [Learn more](#). All payments are processed directly by Stripe.' There are three input fields: 'Cardholder Name', 'Card number' (with a card icon), and 'MM / YY CVC'. Below these is a checkbox option: 'I'd like Cardybot to reach out to members of this channel to help them set up their profile. Uncheck this if you want to fill in your team's info yourself.' The checkbox is checked, and there is a dropdown menu below it with the text 'cardtester'.

Cardybot Handles Setup

- If a channel was selected during setup, Cardybot reaches out to everyone on that channel to get their birthday (day/month) and mailing address (home or office).
- After setup, employees can set birthday notifications to come in for only members of specific channels. This is how birthday notification can be grouped by sub-team.



(VIDEO ON NEXT SLIDE)



C Cardybot ☆

Details

Messages About

C Mailing Address



Street Address (including unit #)

1942 broadway st, ste 314

Address Line 2 (optional)

City

boulder

State/Region

co

Zip/Postal Code

80302

Country

United States of America



Cancel

Submit

C Cardybot

This is the very beg

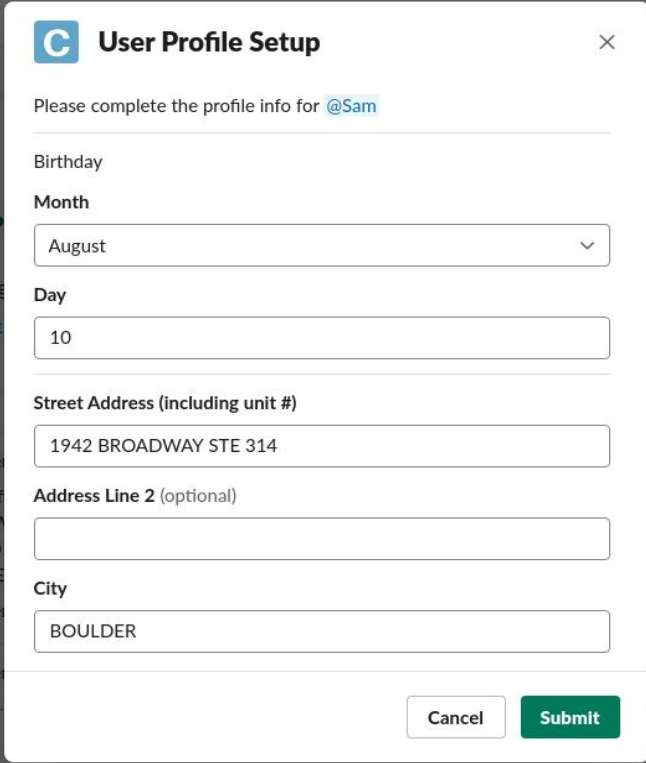
🔍 How does Cardybot

Message Cardybot



Admin Self-Setup

- The team admin (person that installed Cardybot) may choose to add users by not selecting any channel during setup.
- Even if Cardybot handles the user setup, the team admin can still edit user profiles



The screenshot shows a 'User Profile Setup' dialog box for user @Sam. The form includes the following fields:

- Birthday:** A dropdown menu for the month, currently set to 'August', and a text input for the day, currently set to '10'.
- Street Address (including unit #):** A text input containing '1942 BROADWAY STE 314'.
- Address Line 2 (optional):** An empty text input field.
- City:** A text input containing 'BOULDER'.

At the bottom right of the form are two buttons: 'Cancel' and 'Submit'.

(VIDEO ON NEXT SLIDE)

Cardybot

Messages About

User Profile Setup

State/Region

Zip/Postal Code

Country

Channel Group (optional)

@Sam will only be notified about birthdays of members of this channel. Use this to group members into notification groups.

Disable User ⚠️ (optional)

- Disable @Sam so I don't notify them about birthdays or send cards.

Cancel Submit

Details
Cardybot



Cardybot

Find More

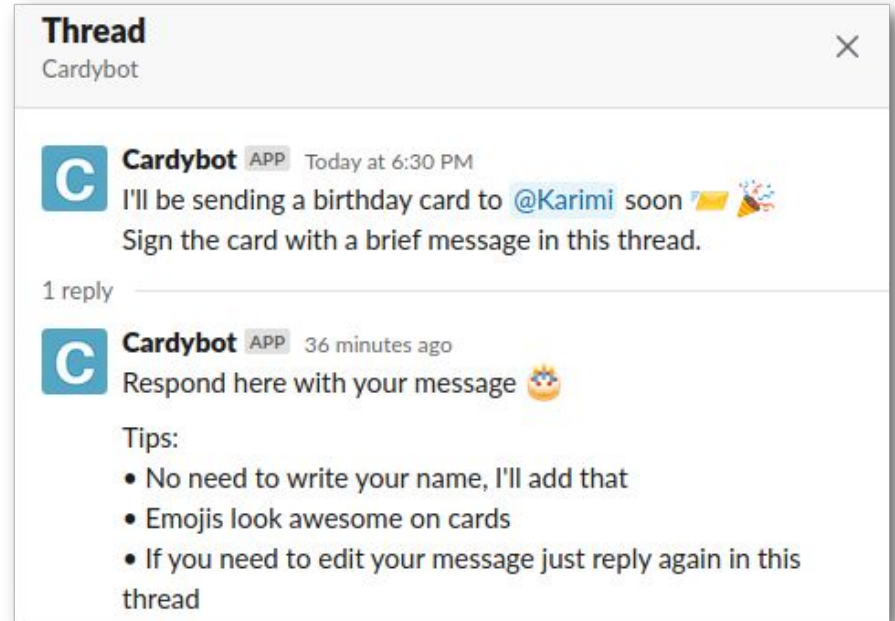
About

Pinned

Files

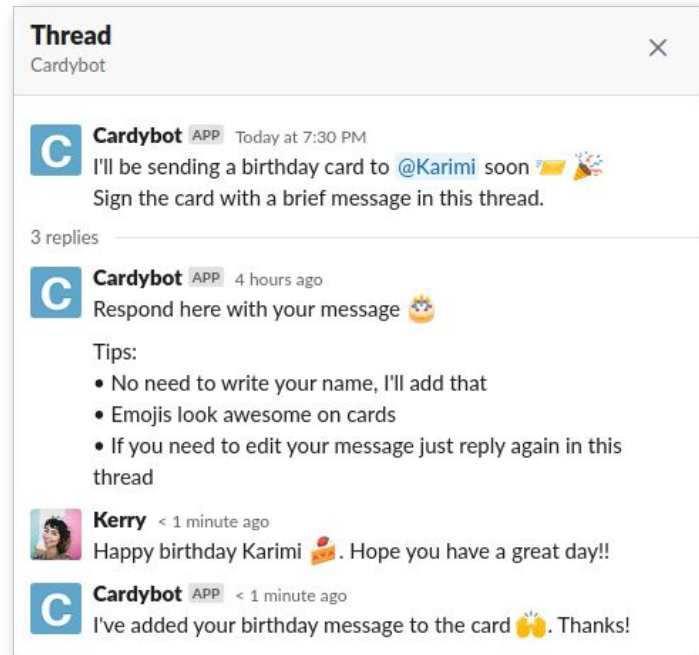
Birthday Reminders

- When a co-worker's birthday is coming up in a few weeks, Cardybot reaches out to ask if you want to sign the birthday card.
- *Note: Cardybot does not tell co-workers the exact birthday in case there are privacy concerns.*



Signing the Card

- Simply reply to the thread and your birthday message is added to the celebrant's card.
- *Each card can be signed by 18-20 people. Messages can include emojis.*



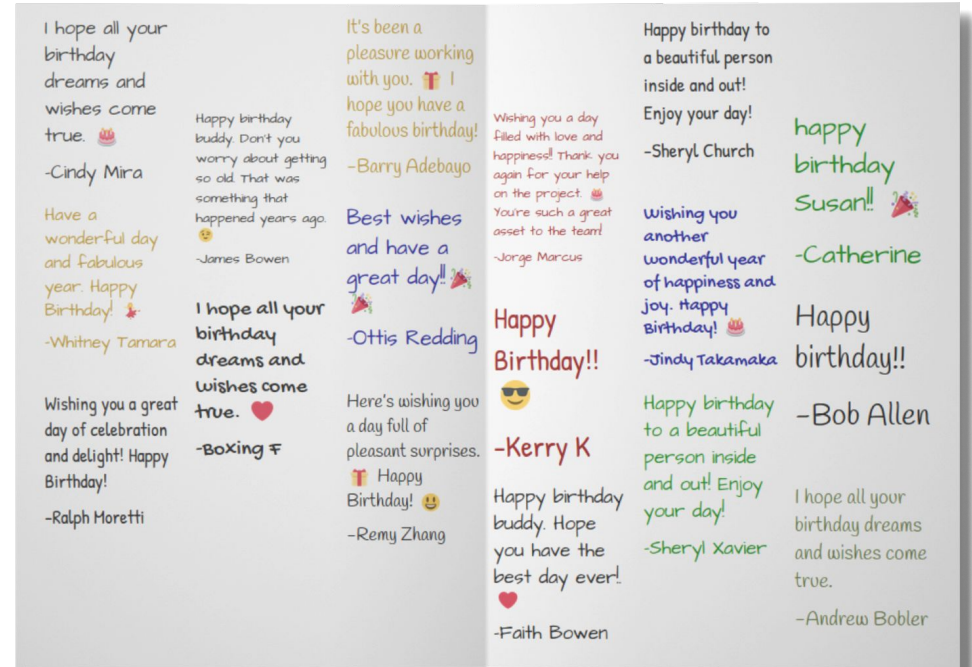
Personalizing the Card

- Cardybot automatically selects a beautiful design for a personalized card.
- Each card has the celebrants name in front of the card and your company logo at the back.



Birthday Message Placement

- Birthday messages are added to the card with creative fonts and colors.
- The card is shipped worldwide with USPS First Class to arrive for the birthday. During user setup, addresses are verified to make sure they are deliverable. [Learn more](#).



Cards done responsibly



We care deeply about the environment.
We **plant a tree** for every 10 cards Cardybot sends out.

Pricing

With Cardybot, pricing is simple. Only pay when a card is sent out. Cards are discounted according to the number of active users on your team.

cardybot.com/pricing

Cardybot

Thank you. For further questions, please reach out to support@cardybot.com

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