



Contact: 650.271.9029

PAYBEE VOLUNTEER CHEAT SHEET

Please update to the latest version of the app

Tap on 'Volunteer' on top right to get started. Tap on your event to get started.

CHECK-IN

1. Tap 'Check-In'. Scan QR code or search by name or email.
2. Select a guest. For group tickets, select the guests in the group to be checked in.
3. If paddles and tables have not been assigned the app will prompt you to assign them. Enter a guest's email if a placeholder email has been assigned. Your guests are now checked in.
4. To assign a unique paddle to an add-on guest who is sharing a paddle, tap 'Assign Paddle'. Enter name and email, then scan or enter an unassigned paddle number.
5. To save a guest's card, tap 'Add Card'. Use the card reader or enter a card manually. Confirm if the guest would like to cover card fees. Save.
6. To add a guest to an empty spot on the ticket on the fly, open the ticket and tap 'Add New Guest', follow instructions.
7. Hand them over the paddle or table card.

ASSIGNING PADDLES TO NEW GUESTS

1. Tap 'Assign Paddles'. Scan Paddle QR code or tap 'Search By Paddle Number' and enter the paddle number to be assigned.
2. Enter the guest's email and name. Assign the donor to the paddle.
3. To save a guest's card tap 'Add Card'. Use the card reader or enter a card manually. Confirm if the donor would like to cover card fees. Save.

ADDING TICKETS/ADDITIONAL PLEDGES/AUCTION ITEMS

1. Tap 'Add Bid & Pledge Single'
2. Scan or type in the paddle number of the guest whose cart you'd like to add to.
3. Select 'Accept Donation' or 'Add to cart' (if the guest already has a cart).
4. Select the campaign you'd like to add from + what you'd like to add
5. Select 'save to cart' if you want them to pay later, or you can check them out on the spot via card/cash/check.

ADDING MULTIPLE PLEDGES (Fund A Need, Live Auction, Last Hero)

1. Record the pledges and bids during the fundraising activities on a piece of paper.
2. Tap 'Add Bid & Pledge Multiple'
3. Select the campaign.
4. For Fund A Need, select the level of the gift. Type the Paddle Number and click on 'Add'. Once all paddles have been recorded at that level click on 'Close' or go back.



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5. For Live Auction, select the item. Type the winning Paddle Number and amount and click on 'Save'. Move on to the next item in the list. Go back to move on to the next fundraising activity.
6. You can also add tickets, Last Hero pledges to guests' carts in this flow in the same way.

CONNECT CARD READER (Before accepting payments)

1. Confirm "Location Services" and "Bluetooth Services" are turned ON in the phone's settings.
2. Make sure you are tapped into the event and select the wireless icon on the top right corner of your screen
3. Tap on the 'Connect Bluetooth Reader'. Follow instructions, select the reader. Tap 'Done'.

CHECK OUT/ACCEPT PAYMENT BY PADDLE

1. Tap 'Checkout'.
2. Scan the QR Code on their paddle or Tap 'Search by Paddle Number' if needed.
3. Verify items.
4. Tap 'Checkout Cart'.
5. Select the payment method.
6. For Check, take photos of the check or enter the check number in Memo. Tap 'Record'.
7. For Card, select 'Tap To Use Card Reader'. Follow instructions. Tap 'Enter Card Manually' if needed.
8. In Confirm Payment, the checkbox is selected if the donor is covering the transaction fees. Uncheck the checkbox if needed.
9. Collect the signature. Tap 'Confirm Payment'.

CHECK OUT/ACCEPT PAYMENT BY NAME/EMAIL

If a guest doesn't have their paddle number you can search for them via Donor Look Up

1. Tap 'Donor Lookup'.
2. Enter in their email address or name. From the menu select their profile as it comes up.
3. Verify items.
4. Tap 'Checkout Cart'.
5. Select the payment method.
6. For Check, take photos of the check or enter the check number in Memo. Tap 'Record'.
7. For Card, select 'Tap To Use Card Reader'. Follow instructions. Tap 'Enter Card Manually' if needed.
8. In Confirm Payment, the checkbox is selected if the donor is covering the transaction fees. Uncheck the checkbox if needed.
9. Collect the signature. Tap 'Confirm Payment'.