

SBF Fundraising App Training Guide



2020 Ambassador, Micah

SBF Fundraising App

How to Download

The SBF Fundraising App can be found on the [Apple App Store](#) or the [Google Play Store](#) by searching "St. Baldrick's."



Apple App Store



Google Play Store

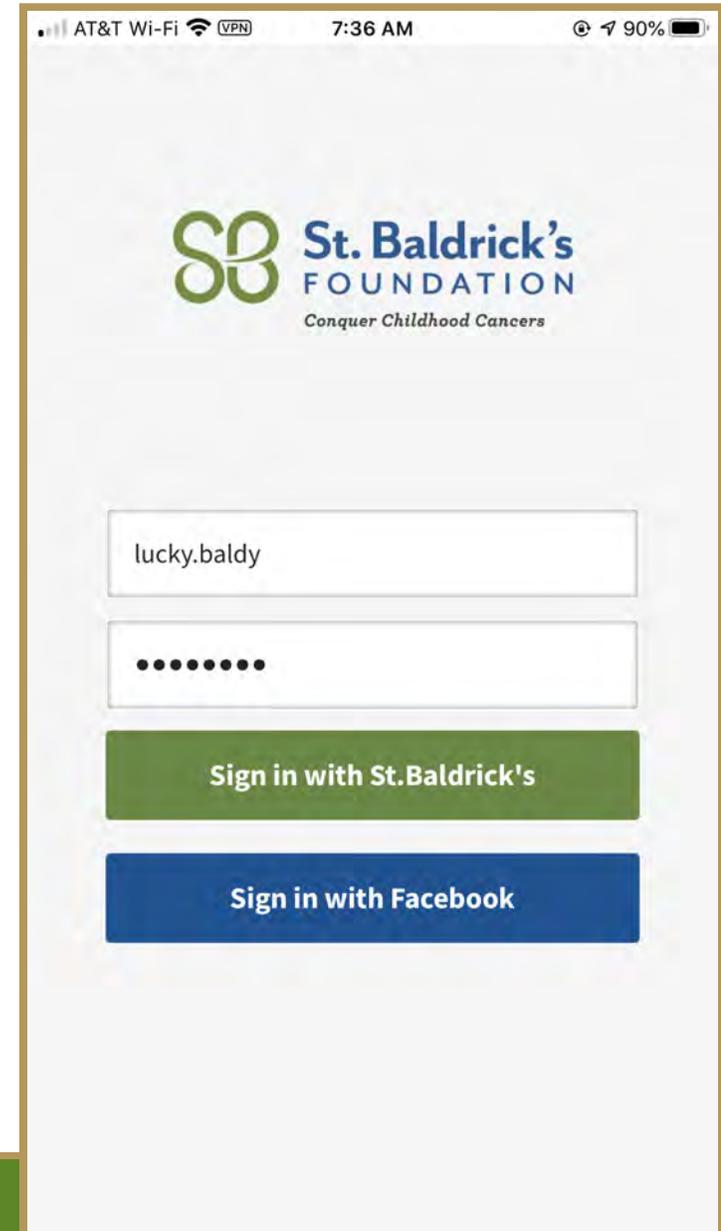
SBF Fundraising App Login

Login to the App with your St. Baldrick's username and password.*

*If you login to the St. Baldrick's site using your Facebook credentials, then login with your Facebook credentials instead.

If you cannot remember your user name or password, please access our website at www.stbaldricks.org/login to reset.

*If have any trouble, please contact your Special Events Coach.



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SB St. Baldrick's
FOUNDATION
Conquer Childhood Cancers

lucky.baldy

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Sign in with St. Baldrick's

Sign in with Facebook

SBF Fundraising App

Terms & Conditions

As part of our efforts to protect your security, we've updated our terms and conditions for our mobile app usage. Please agree to them for access to our mobile app.

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Terms & Conditions

ST. BALDRICK'S FOUNDATION MOBILE APPLICATION TERMS AND CONDITIONS OF USE AGREEMENT

By using the St. Baldrick's Mobile Application (the "Mobile App"), you agree to be bound by the St. Baldrick's Mobile Application Terms and Conditions of Use Agreement (the "T&C Agreement").

The T&C Agreement is between you and the St. Baldrick's Foundation ("SBF").

Mobile Carrier Fees
Any fees charged to the users by their mobile carrier are the responsibility of the user.

Mobile App Use
SBF grants you the right to use the Mobile App for your personal use on the mobile product that you own or control and as permitted by any terms of use required by the party providing the app store from which you are downloading the Mobile App.

You may not modify, copy, publish, license, sell, or otherwise commercialize the Mobile App or any information or software associated with the Mobile App.

You may not rent, lease or otherwise transfer rights to the Mobile App.

You may not use the Mobile App in any way that could bring harm to SBF.

You must use the Mobile App in compliance with all applicable

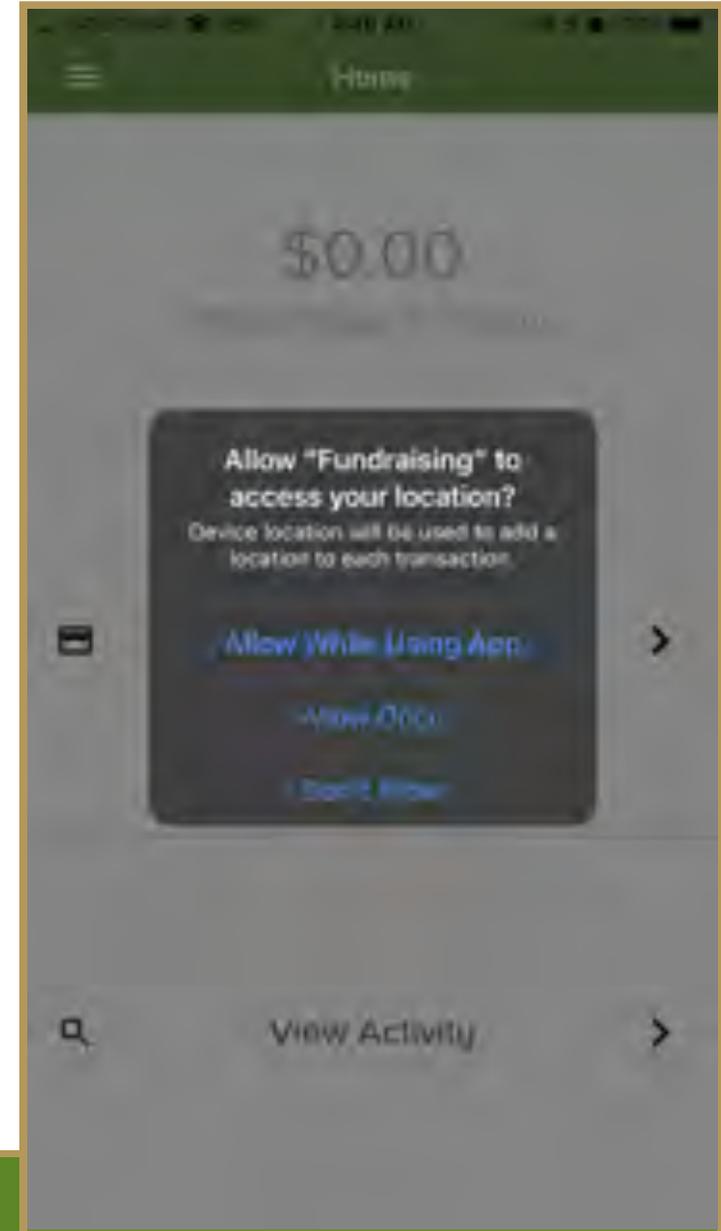
I agree to these Terms & Conditions

SUBMIT

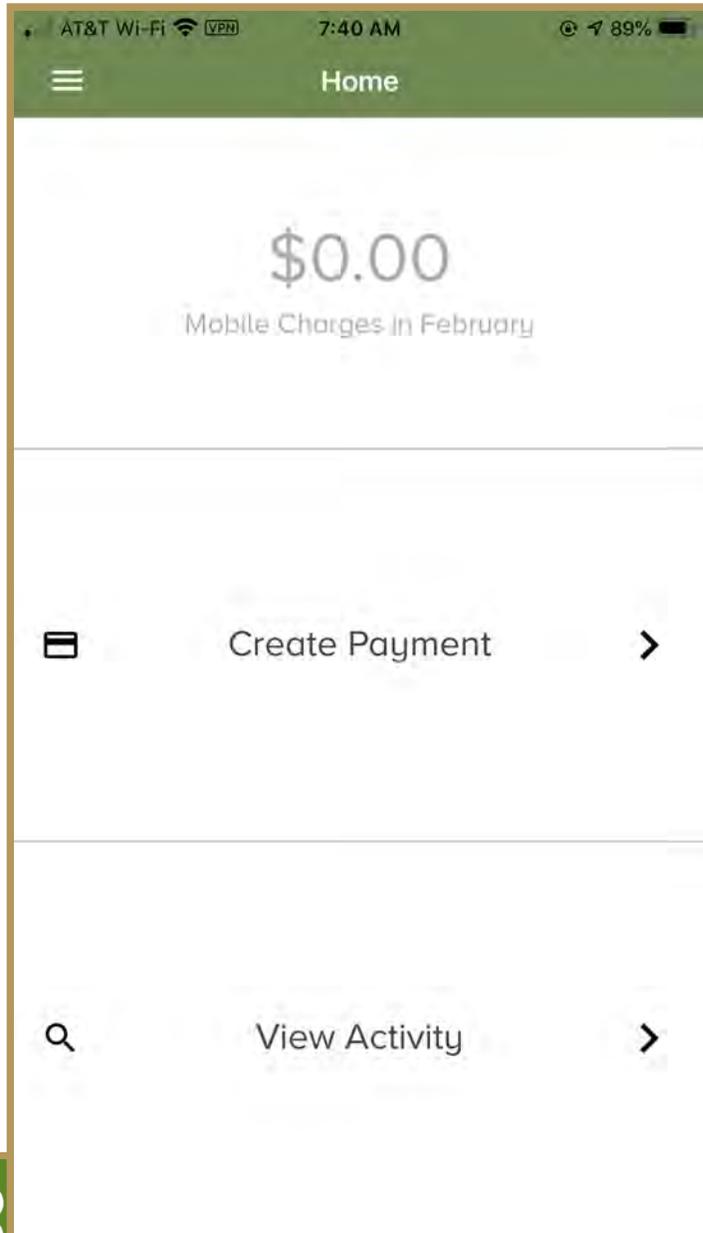
SBF Fundraising App

Location Access

You will be asked to grant access to your phone's location to tag transactions by payment. This is not a capability we have at this time. Please feel free to choose do not allow.



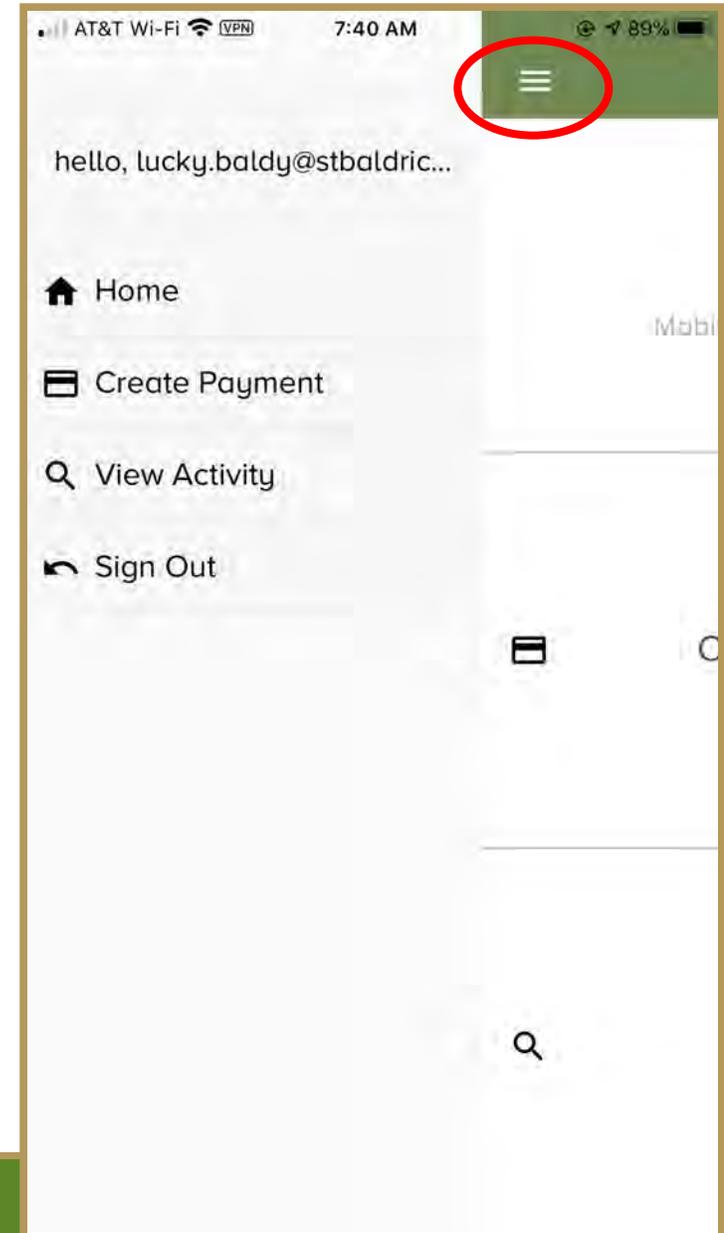
SBF Fundraising App Home Screen



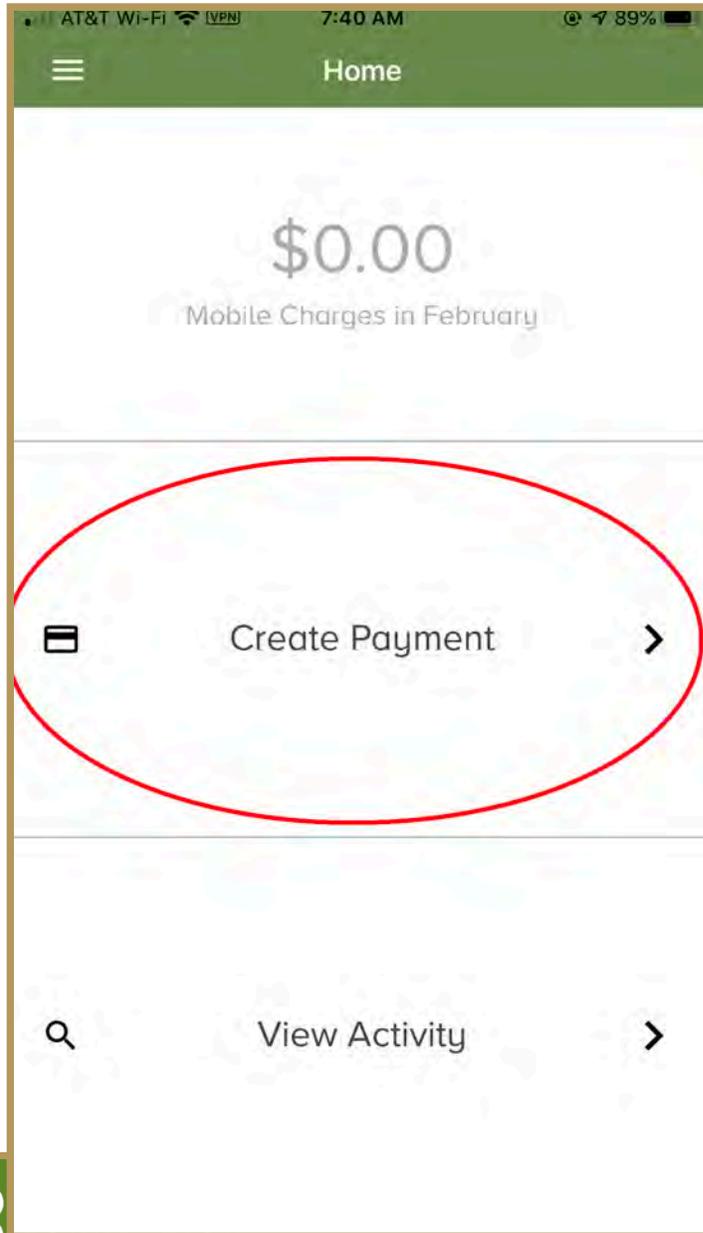
The Home Screen lists charges you have collected on your own mobile App for that month.

Here you'll find the option to 'Create Payment' or 'View Activity' as well.

Click the three lines in the upper left corner to view options for navigating within the App, including the 'Sign Out' feature.



SBF Fundraising App Create Payment



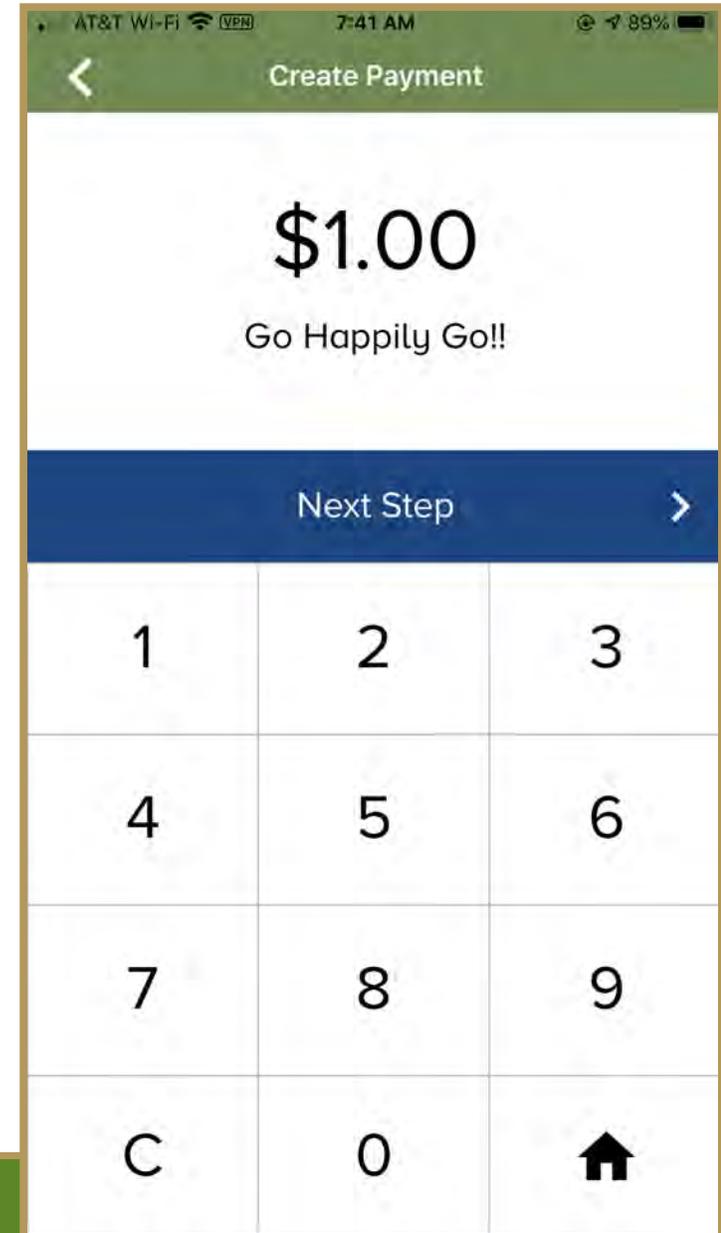
To collect a donation, select "Create Payment"

Note: If you are processing multiple payments, change your phone's display settings so that your phone does not lock in the middle of a transaction.

Enter the donation amount.

Check donation:
Enter amount listed on check.

Recognition name will be what is recognized on the St. Baldrick's website.



SBF Fundraising App

Search Feature

Use the search bar to type the name of the person / entity that should get credit for the donation (participant, team, fundraiser, or event).

Be sure to type the name as it appears on the St. Baldrick's website.

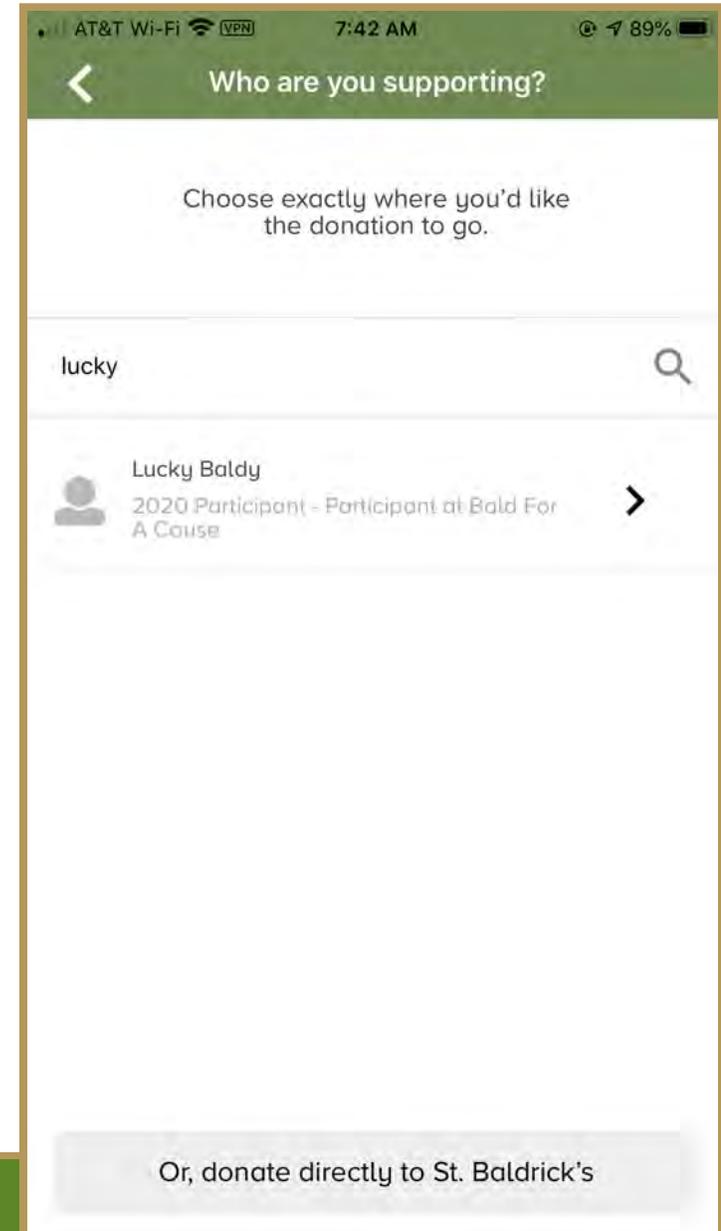
You do not need to type the full name (Lucky vs Lucky Baldy).

You can also click 'Or, donate directly to St. Baldrick's' at the bottom to collect general fund donations.

The options you see below the search bar relate to your most recent/common searches in the App.

Select which person / entity from the results page you want the donation to credit.

This is where the donation will reflect on the St. Baldrick's website.



SBF Fundraising App

Donor Entry

Enter the donor's information here.

Select 'Make Anonymous Donation (or submit non donation payment)' for these instances:

- Donor wishes to be listed as Anonymous on the website

OR

- Collecting payment for ticket or raffle sales
- Collecting payment for purchased items (shirts, bracelets, etc.)
- Collecting payment for auction items

In these instances, since there are an exchange of goods for the 'donation' it does not qualify for the normal donation tax receipt.

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< Donor Entry

Happily Baldy

happily.baldy@stbaldricks.org

Submit

Make Anonymous Donation
(Or submit non donation payment)

SBF Fundraising App

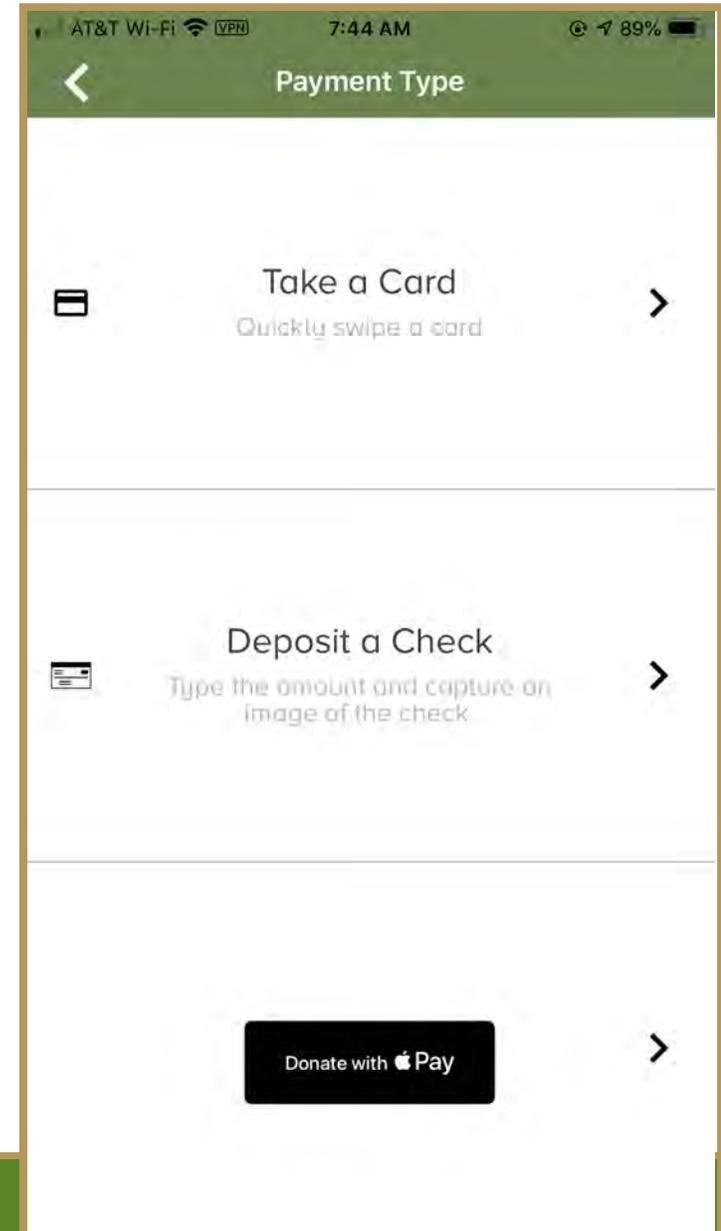
Payment Type

Select the appropriate payment and proceed.

Continue to the next section of the guide based off your payment selection.

a. Check

If you choose 'Donate with Apple Pay,' that will process from the account you have setup on your mobile device. We do not encourage the use of this step unless you are the donor.



SBF Fundraising App

Processing a Check Donation

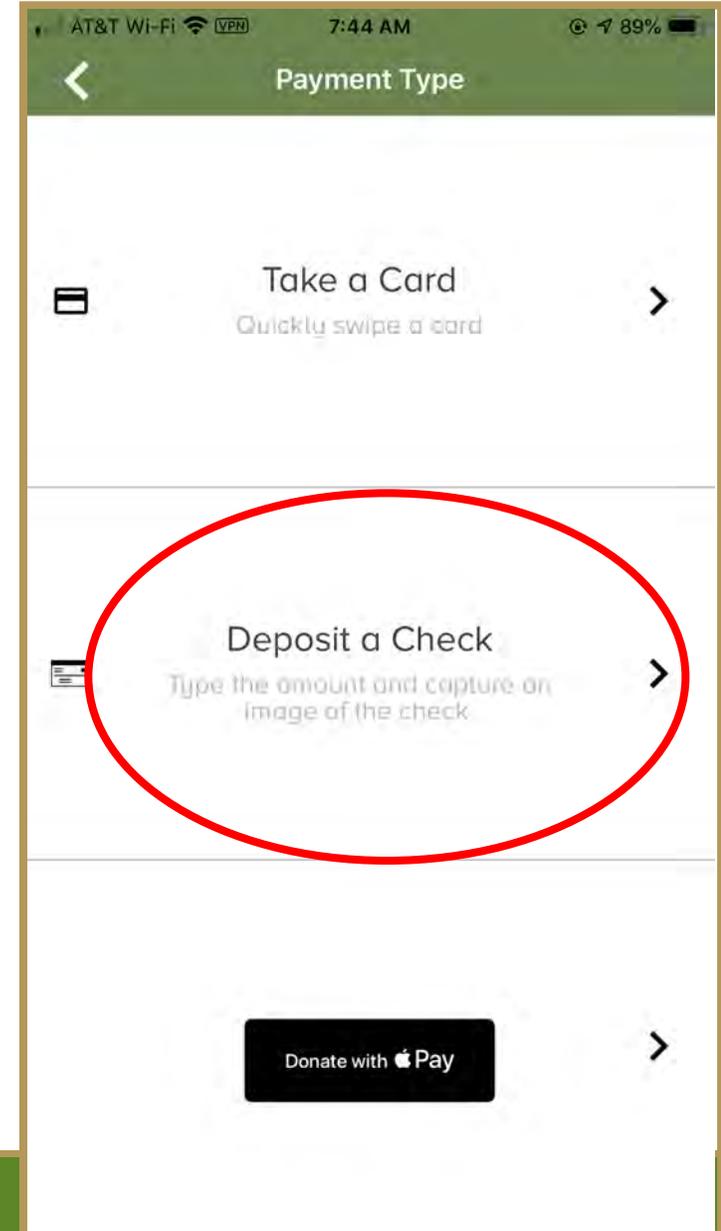
Choose 'Deposit a Check' to process a check donation. Ensure the check is:

- Made payable to St. Baldrick's Foundation
- Signed by the donor
- Dated correctly
- Amounts match on check

Not all checks can be processed in the App. Mail these checks directly to St. Baldrick's:

- Business checks
- Checks over \$5,000

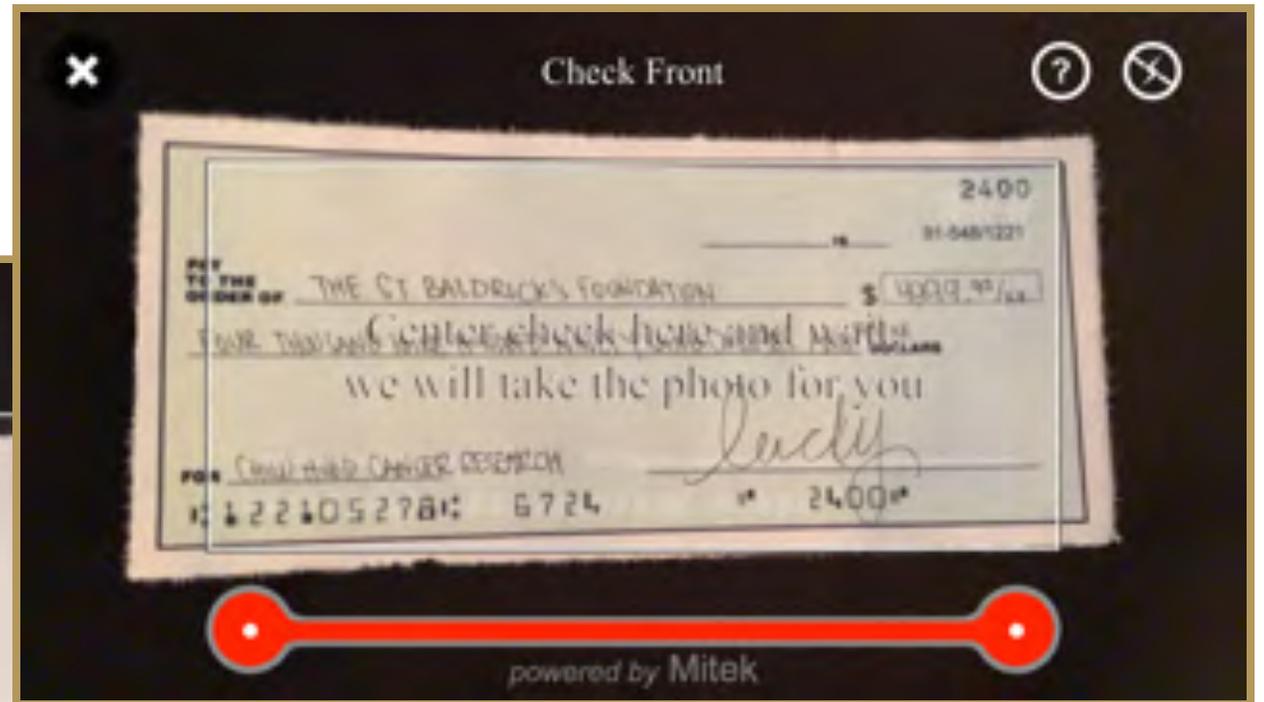
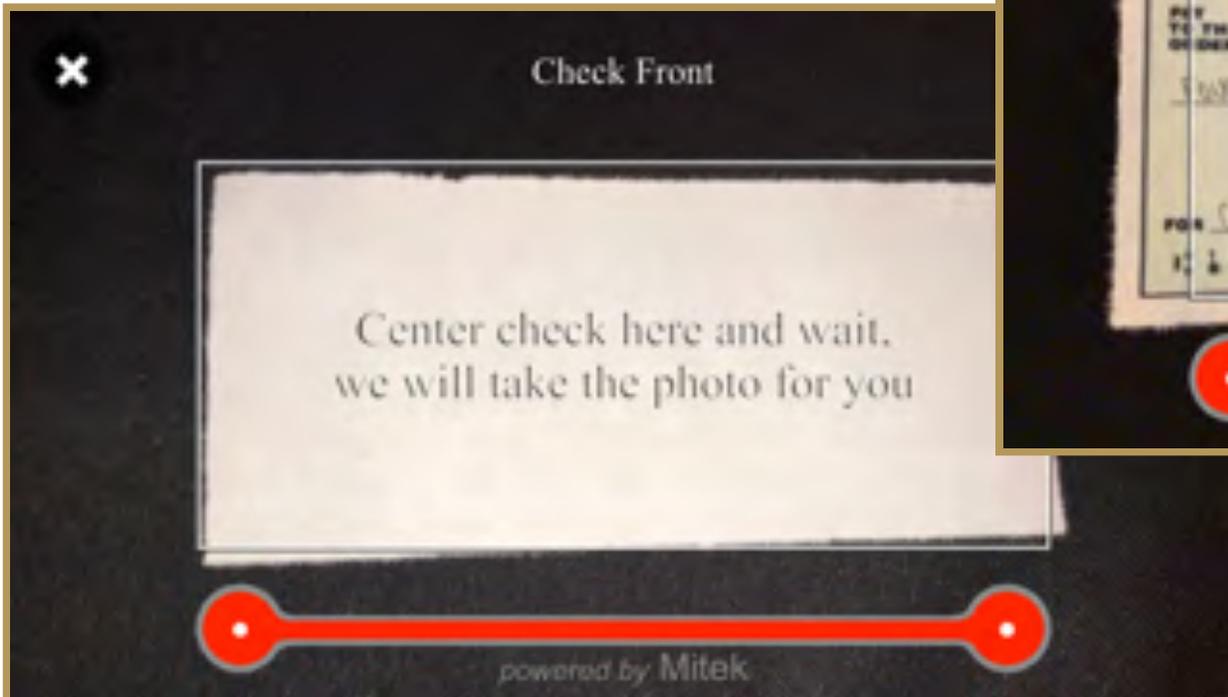
Attn: Erin Griffith, St. Baldrick's Foundation
1333 S. Mayflower Ave., Suite 400
Monrovia, CA 91016



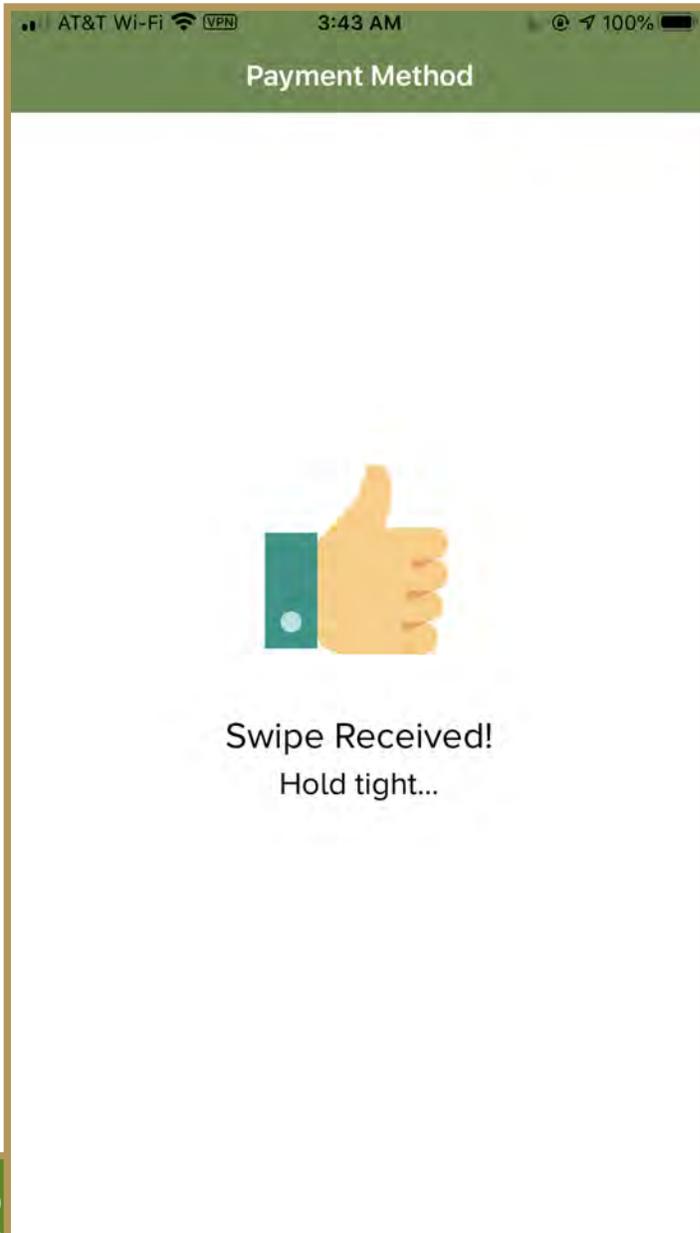
SBF Fundraising App

Processing a Check Donation Continued

Allow your phone camera to access the App (one-time step).



Line up the check based on the frame and take a picture of the check.

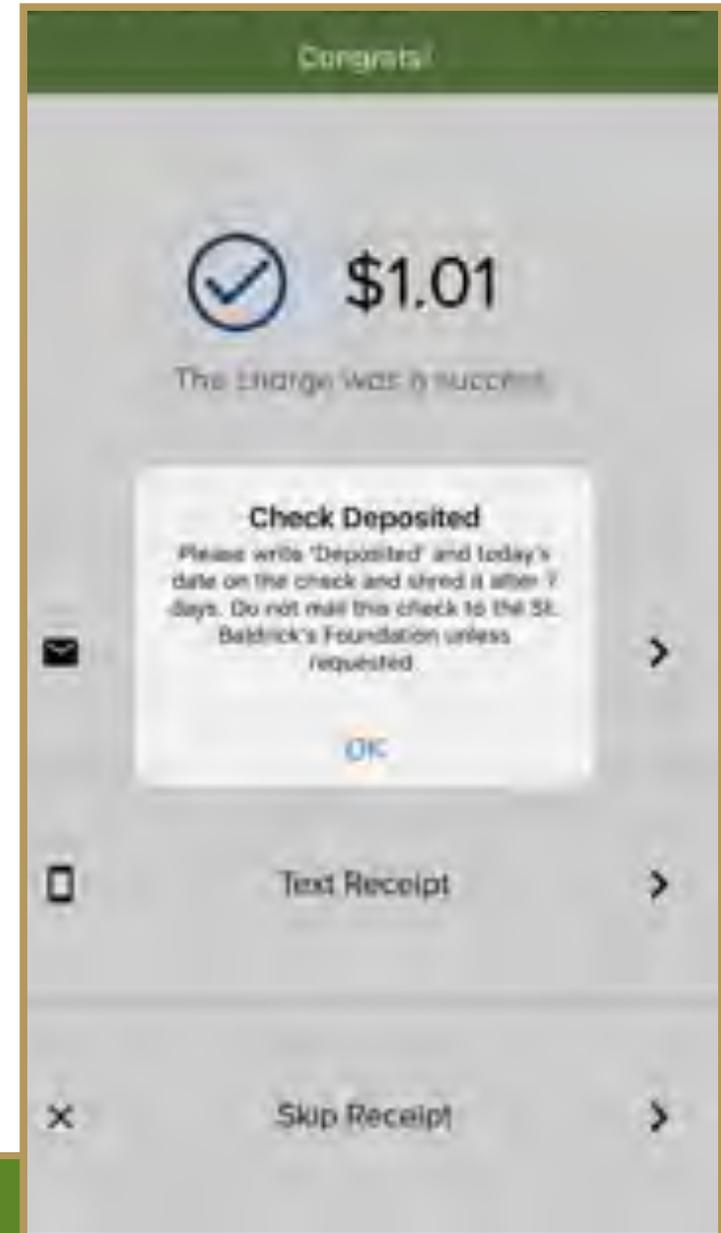


SBF Fundraising App Processing a Check Donation Continued

If the check passes the first layer of approval, you will receive this message.

Please hold onto checks for 7 days after posting them in the App, in case we have questions or need the originals mailed to us for further processing. There are instances where a check appears to process successfully in the App, but reviews are still required by St. Baldrick's staff and bank institutions. After 7 days you can shred the checks.

**Do not mail in checks deposited through the App unless directed to by St. Baldrick's staff.*



SBF Fundraising App Donation Receipting

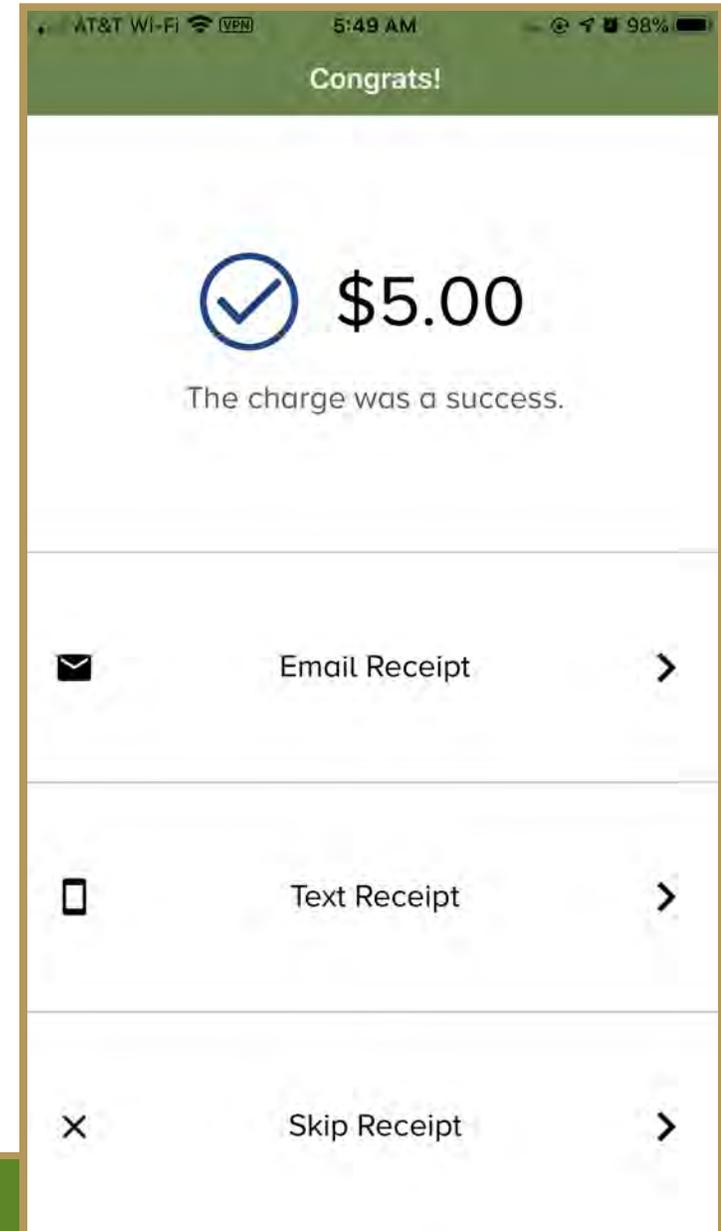
There are 3 receipting options

- Email
- Phone Number
- No Receipts

To ensure the donor receives their tax receipt, please click 'Email Receipt.'

You also have the option to 'Text Receipt' but we do not recommend this step.

If you select 'Skip Receipt' the donor will not receive proof of their donation.



SBF Fundraising App

Donation Receipting Email

The email populated here is the same email you entered under Donor Entry.

*Do not enter your own email address unless you are the donor.

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Send Email Receipt

Receipt for \$5.00

lucky.baldy@stbaldricks.org

Send

Go Back

SBF Fundraising App

Donation Receipting Email

The phone number you enter is where a text receipt will be sent.

*We do not recommend this step since it is not the most efficient way for donors to retain for future reference.

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Send Text Receipt

Receipt for \$1.01

(555) 555-5555

Send

Go Back

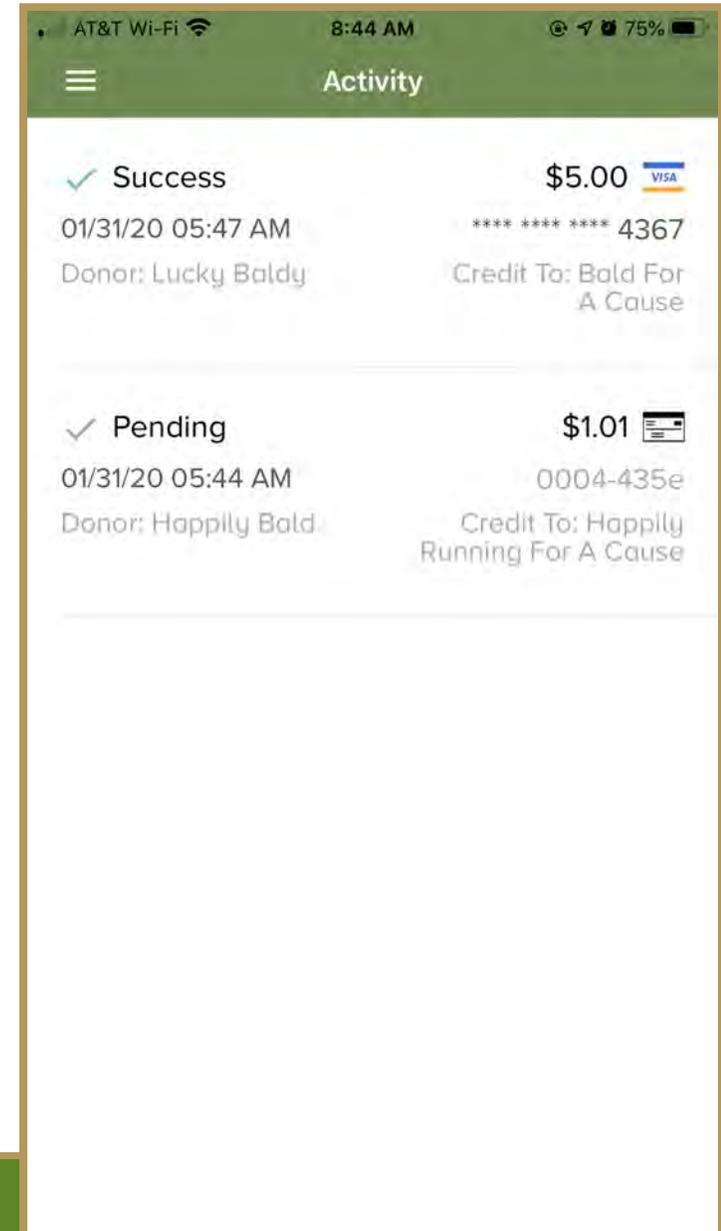
SBF Fundraising App

Donation Receipting Email

The Activity Screen will list donations you have collected via the SBF Fundraising App on your St. Baldrick's mobile account.

Donor details and where the donations were allocated are here for your or the donors reference purposes.

If seeking additional help on any check donations, please reference the 8-digit Confirmation number, unique for each check donation.



SBF Fundraising App

Other Training Resources

Please refer to the FAQs on our website [here](#) for more information.

If you have questions or feedback, please contact your Special Events Coach or MobileApp@StBaldricks.org.

