

# Moshe Frequently Asked Questions

## General

1. How do I get started with Moshe?
  - a. Create a PayPal account if you don't already have one. See instructions at: How do I create a PayPal account?
  - b. Download the Moshe app from the app stores and login. See instructions at: How do I sign-in and create my profile?
  - c. Fund your Moshe Wallet from PayPal. See instructions at: How do I manage the funds in my Moshe wallet?
  - d. Create your friends and family list in Moshe. See instructions at: How do I share Moshe with friends and family?
  - e. Get added to other friend's lists by accepting Friend requests. See instructions at: How do I accept Friend requests?
  - f. Join the events you have been invited to. See instructions at How do I accept event invites?
  - g. Plan and create your own events with friends and family. See instructions at:
    - i. What's the difference between a Quick Pay and a Plan Pay Event?
    - ii. How do I create a Quick Pay Event?
    - iii. How do I create a Plan Pay Event?
2. Where can I find instructions or responses to Frequently Asked Questions on the Moshe app?
  - a. Select the **drop-down menu** (three lines) from top-left of any screen.
  - b. Select **FAQ's**.
  - c. Questions are organized into three categories: General, Event Organizers, and Event Participants.
3. What does it cost to use Moshe?
  - a. Everyone:
    - i. The app is a free download for everyone.
    - ii. We are working on enhancements to the app that may require a subscription to cover the costs of development, but

for now the only cost is the small convenience fee for payment transactions.

- b. Event Participants: There is a small convenience fee (50 cents) assessed on each payment transaction.
- c. Event Organizers:
  - i. There is a single convenience fee (50 cents) assessed for each event.

#### 4. How do I sign-in and create my profile?

- a. After you load Moshe onto your phone/computer, there will be three quick Moshe information screens. You can move through these screens by tapping the arrow on the bottom of the screen. Tap the **LOGIN** button on the third screen.
- b. Enter your mobile phone number and select **Get Verification Code**.
- c. You will receive a text message on your phone with a 4-digit verification code.
- d. Enter the verification code and select **Verify Code** (you have 30 seconds to enter the code or you will be asked for a new code). After entering the code, select **Continue** to move to the profile screen.
- e. Enter your Profile information:
  - i. Tap the **picture icon** and select a new picture from your photo gallery or take a new picture with your phone's camera.
  - ii. Type in your **full name**. **Hint**: also use your middle name or initial if you think you have a more common name.
  - iii. Type in your **email address**.
  - iv. Type in a **Referral Code**. Please enter a referral code if you have one so your friend gets the referral reward!
  - v. **Tap the box** to accept Moshe's Terms and Conditions and Privacy Statement. Tap the blue highlighted **Terms and Conditions** OR **Privacy Statement** if you would like to access and read these documents.
  - vi. Tap **Continue**.
  - vii. You will get a small popup screen asking if you want to add funds to your Moshe wallet. Tap the **entry field** next to the dollar sign if you already have a PayPal account and want to

add funds now OR tap **Later** (top right of popup screen) if you need time to create your PayPal account or would simply like to add funds later.

- viii. If you tapped the entry field next to the dollar sign, enter the **amount** you want to add to your wallet (whole numbers only, no decimals) and tap **Add Funds**. You will be directed to the PayPal portal where you will enter your PayPal email and password. After successfully entering your PayPal information, you will get a popup screen indicating funds have been successfully added to your Moshe wallet. Tap **Continue** to go to the Moshe main screen.

**Note:** If you already have a PayPal account, see instructions for adding funds at: How do I manage the funds in my Moshe wallet? If you DO NOT have a PayPal account, see how to create a PayPal account at: How do I create a PayPal account?

- ix. If you tapped **Later**, you will go to the main screen with the navigation bar at the bottom of the screen.

**Note:** You can update your profile at any time by selecting **Profile** from the navigation bar located at the bottom of the main screen. See instructions at: How do I update my profile?

**Note:** You can access your Moshe wallet at any time by tapping the **Wallet Icon** in the top right corner of the main screen. See instructions for: How do I manage the funds in my Moshe wallet?

## 5. How do I manage the funds in my Moshe wallet?

**Note:** A PayPal account will be needed to transfer funds in and out of your Moshe wallet. We selected PayPal as our payment platform as it is the most recognized and user-friendly payment platform. Also, PayPal does not charge fees for transactions between personal accounts. It is a quick and simple process to create a PayPal account. If you don't already have a PayPal account, see instructions at: How do I create a PayPal account?

**Note:** You can view all your wallet transactions by tapping the **All-Transactions Arrow** on the Wallet screen.

- a. Tap the **Wallet icon** in the top-right corner of the Moshe main screen.
- b. Tap **Add Funds**
  - i. Tap **above the line** and **enter the amount** you want to add to your Moshe wallet from your PayPal account.
  - ii. Tap **Add Funds**.
  - iii. Tap the **entry box** and **Enter your PayPal email address or mobile number**. Tap **Next**.
  - iv. **Tap the box** and **enter your PayPal password**.
  - v. Tap **Log In**.
  - vi. Tap **Complete Purchase**.
  - vii. Tap **Continue** on the popup confirmation. Your transaction will be listed on the Wallet screen.
  - viii. Tap the **Back button** to move back to the main screen.
- c. Tap **Withdraw**
  - i. Tap **above the line** and **enter the amount** you want to transfer back to your PayPal account.
  - ii. Tap **Transfer**.
  - iii. Tap **Continue** on the popup confirmation. Your transaction will be listed on the Wallet screen.
  - iv. Tap the **Back button** to go to the main screen.

## 6. How do I create a PayPal account?

- a. Go to <https://www.paypal.com> in a web browser.
- b. Click Sign Up.
- c. Choose an account type (Personal or Business) and click Get Started.
- d. Enter your email address and click Next.
- e. Enter your personal or business details and create a password.

## 7. How do I share Moshe with friends and family?

**Note:** Make sure your Friends list on Moshe is up to date because you can only invite friends to events who have been added to your Friend's list on Moshe.

- a. Share App option from the drop-down menu (top left corner):
  - i. Select **drop-down menu** (three lines on top-left of any screen).

- ii. Select **Share App** option near the bottom of the list.
  - iii. Select **Messages** or **Mail** and then select the friends and family you want to share the app with. Press **send**.
  - iv. Your friends will receive a text message or email with an introductory message, a referral code and a link to the app store or the Moshe website. There is a link on the Moshe website to the app store.
  - v. Select the **search option** on the App Store screen. **Enter Moshe** in the search field.
  - vi. Select the **Moshe app** and download it to your phone or computer.
  - vii. After the Moshe app has been downloaded and an account created using your referral code, you will have reward amounts added to your referral reward account. Rewards can be used to pay convenience fees.
- b. Manage Friends and Family option from the navigation bar on the main screen:
- i. At the main screen: Select **Friends** from the navigation bar at the bottom of the screen.
  - ii. Select **Manage Friends** from the top menu.
  - iii. Select **Add Friends**.
  - iv. Tap the **App** box.
  - v. Select **App** or **Contacts**. **Note:** Friends who have already added the Moshe app to their phone will appear in the App list.
  - vi. Use the search option or scroll down to find a friend from the list.
  - vii. App List: If you selected the App list, tap the **Add** icon next to the friends you want to add to your friend list. Tap **YES** on the confirmation popup screen. After your friends accept the friend request, they will show up in your friend list.
  - viii. Contact List: Tap the **Invite** button next to friends you want to add to your friend list. Your friends will receive a text message with an introductory message, your referral code

and a link to the app store or the Moshe website. There is a link on the Moshe website to the app store.

1. Select the **search option** on the App Store. Enter **Moshe** in the search field.
  2. Select the **Moshe app** and download Moshe to your phone or computer.
- ix. After your friends have downloaded the Moshe app and created an account using your referral code, you will get rewards added to your referral reward account. Rewards can be used to pay for convenience fees.
- x. After your friends accept your friend request, they will show up in your friends list so you can include them in your events.

#### 8. How do I accept (or reject) friend requests?

**Note:** Your friends can only invite you to their events after you have accepted their friend requests.

- a. On the main screen: tap **Friends** from the bottom navigation bar.
  - b. Tap **Manage Friends**.
  - c. Tap **Friend Requests**.
  - d. Tap **Accept** OR **Reject** button next to the name of the person that sent the friend request.
  - e. A notification text will be sent to the requestor and after you accept the friend request you will be added to their friend's list so they can include you in their events.
  - f. Tap the **Back Arrow** to go back to the main screen.
9. What's the difference between a Quick Pay and a Plan Pay event?

**Hint:** When in doubt use the Plan Pay option as it contains all the features.

- a. Quick Pay is used for private events (i.e., participants *can't* share the event with others) and you only have the option of a single payment request. Some examples: collecting for shared dining expenses, shared roommate expenses, shared vacation expenses or collecting for a birthday gift, baby shower, or office pool. **Note: DO NOT USE** the

Fixed Pay option if there is a chance the event will be cancelled before the event start date or you may need to make refunds or adjustments after the event is over. **When in doubt, USE** the **Calculated Pay** option as it includes all the available event and payment options.

- b. Plan Pay is used for public events (i.e., participants *can* share the event with others) and you have the option to collect costs using a series of payments over a period of time. For example: collecting player fees in installments over the course of a season. Note: DO NOT use the Fixed Pay option if you need to make refunds or adjustments after the event is over. **When in doubt, USE** the **Calculated Pay** option as it includes all the available event and payment options.

10. What's the difference between the Fixed Pay and Calculated Pay options?

**Hint:** When in doubt use the Calculated Pay option as it contains all the necessary features.

- a. Fixed Pay option can be used for events that have a fixed cost per participant and there is no expectation that a refund or adjustment to the fixed cost will be needed at the end of the event. Event examples include: player sporting fees or event admission tickets.
- b. Calculated Pay option can be used to help calculate the cost per participant using the estimated event cost and the estimated number of participants. The refund/adjustment option is available with the Calculated Pay option because the actual event cost or the actual number of participants may be different than the original estimates. Event examples: shared vacation or shared travel expenses.

11. How do the event categories work?

**Note:** Event categories are used to help keep track of events from start to finish.

- a. Drafts – Event Organizers can save their events as a draft so they can come back and complete them later. After the Organizer has finished entering the event details and creating an event, the event will move to the Upcoming or Active category depending on the event start

date. Event invites are sent out when the event is created. If you are an event Participant, your event invite will show up in the Pending Invite category.

- b. Upcoming – Events in the upcoming category have future start dates. Participants are requested to join the event while the event is in the Upcoming category.

**Note:** Participants can make payments as soon as they join the event.

**Note:** Organizer can still edit events after a payment has been received, but the event cannot be deleted (cancelled) after a payment has been received. See instructions on how to cancel an event at: [How do I cancel upcoming events and return payments?](#)

- c. Active – Events move to the Active category when the current date is between the event start and event end date. Participants are requested to make payments when the event is in the Active category.
- d. Pending Invite – Event invites are sent out to participants when the event is created. Event invites for all participants show up in the Pending Invite category. The event shows up in either the Upcoming or Active category after the Participant joins the event.
- e. Past Due – Past Due category is to help the Organizer and Participants keep track of past due payments. Events move from the Active category to the Past Due category after the event end. The event will move from the Pending Payment category to the Completed category after the event end date if all payments have been received or after the predetermined number of days. This number is entered by the Organizer as part of the initial event setup – the minimum number of days is 20, however the Organizer can enter a number in greater than 20.  
**Note:** The Organizer can complete event refunds or adjustments when events are in the Past Due category.
- f. Completed – Events move from the Active category to the Completed category after all payments have been made. Events also move from the Past Due category to the Completed category after all payments have been received OR after the Organizer's selected number of days have passed.

**Note:** The Organizer can make event refunds or adjustments when events are in the Past Due or Completed categories.

**Hint:** Completed event category should be cleared out periodically by deleting old events. Tap on the **three red dots** in the top right-hand corner of the event screen and then tap **Delete**.

## 12. What if I cancel an event and want to refund payments?

**Note:** Refunds/Adjustments are only available with the Calculated Pay option. The event will need to be in the Past Due or Completed Category before refunds can be issued.

- a. Tap **Events** on the navigation bar.
- b. Slide the event categories to the left until you can see the Past Due or Completed categories. Tap the **Past Due** or **Completed** category.
- c. Tap the **event** you want to make a refund.
- d. Scroll down to the bottom of the screen and tap **Any Refunds or Adjustments?**.
- e. Actual Event Cost popup screen.
  - i. Enter the **actual cost** in the Actual Event Cost field. The app calculates the Actual Cost Per Participant and the Difference between the Estimated and Actual Cost Per Participant. The option at the bottom of the screen will indicate whether it's a refund or adjustment.
  - ii. If you would like to make a refund or adjustment, tap the **Make Refund** at the bottom of the screen.
    1. If you choose **not** to make a refund, tap **on the top of the screen** and then tap the **back arrow** to move back to the main screen.
  - iii. The screen will show everyone who has joined the event along with the payments they have made. Tap the **box** to remove the check next to anyone that you want to exclude from the refund.

- iv. Tap **Allocate Cost** button to move to the Allocate Cost popup screen.
- v. Select how you want to allocate the cost by tapping one of the **allocation options**.
  1. Equal – the difference between the actual and estimated event cost will be allocated equally amongst the selected members.
  2. Actual – the difference between the actual and estimated cost can be allocated amongst the selected members in different amounts by entering actual amounts. Enter amounts next to the participants until the amount allocated is equal to zero.
  3. Percentage - the difference between the actual and estimated cost can be allocated amongst the selected members in different amounts by entering percentages. Enter percentages next to the participants until the amount allocated is equal to zero.
- vi. After making your entries for your allocation, tap **Make Refund** button at the bottom of the screen.
- vii. Tap **YES** on the popup confirmation to complete the refund/adjustment and then tap **DONE** to move back to the main screen.

### 13. How do I delete events in the Completed category?

- a. Tap **Events** on the navigation bar on the main screen.
- b. Slide the event categories to the left until you see the Completed category.
- c. Scroll down to the selected event.
- d. Tap the **three red dots** in the top-right of the event picture.
- e. Tap **Delete**.
- f. Tap **Yes** on the popup screen confirming you would you like to delete the event.

### 14. How do I navigate Moshe?

**Note:** The navigation bar at the bottom of the main screen is the easiest way to navigate Moshe. You can also access numerous other options from the dropdown menu located on the top-left corner of the screen.

a. Navigation Bar

- i. Dashboard – quick summary of your monthly payment stats and your events.
- ii. Events – create Quick Pay or Plan Pay events.
- iii. Friends - make changes to your list of friends and groups.
- iv. Profile - update your profile information.

b. Dropdown menu

- i. Wallet – manage the funds in your Moshe wallet.
- ii. Manage Friends & Groups - make changes to your list of friends and groups.
- iii. Manage Subscription – select from the various subscription options.
- iv. Contact Us – send us your comments or questions.
- v. Referral Program – shows a summary of your referral points.
- vi. Terms and Conditions – outlines the terms and conditions for the use the Moshe app.
- vii. Privacy Policy – describes how we maintain the privacy of your personal information used by Moshe.
- viii. About Us – tells a little bit about the Moshe team and how Moshe got started.
- ix. FAQ's – list of frequently asked questions to help you get the most out of Moshe.
- x. Rate App – you can give us some feedback by rating the Moshe app.
- xi. Share App – you can share the Moshe app with friends and family and earn referral rewards.
- xii. FAQs – get answers to a bunch of frequently asked questions.
- xiii. Rate App – give us some feedback on our app.
- xiv. Notifications – list of all the notifications sent and received on your Moshe account.
- xv. Delete Account – you can delete your account with Moshe.

xvi. Logout – you can close the Moshe account while not in use.

#### 15. How do I update my profile?

- a. Tap **Profile** on the navigation bar at the bottom of the main screen.
- b. Tap the **update icon** for the field(s) you want to update. Make your changes and select **Update Profile**.
- c. Enter your new mobile phone number or email address and tap **Update Phone** or **Update Email**. You will receive a text or email message with a verification code.
- d. Enter the **Verification Code** and tap **Verify Code**.
- e. After you get confirmation that your phone or email has been successfully updated, tap **Update Profile**.
- f. If you are simply changing your profile picture, tap the **picture icon**, and select a new picture from your photos or camera. Tap **Update Profile** and your new picture will be displayed throughout the app.

#### 16. How do I manage my list of friends and groups?

- a. How to Add Friends:
  - i. On the main screen, tap **Friends** from the bottom navigation bar.
  - ii. Tap **Manage Friends** (top right) and then tap **+ Add Friends**.

**Note:** If your friend has already added the Moshe app to their phone, their name will be in the App list. If your friend has does not have the Moshe app on their phone, select their name from your Contact list.

##### From the App List:

- iii. Use the search option or scroll down to find your friend from your contact list.
- iv. Tap the **Add Friend icon** next to their name and then tap **YES** on the popup screen. A Friend Request will show up on your friend's Friend Request screen. After they have accepted the friend request, they will show up in your friends list so you can include them in your events.

From your Contact List:

- v. Tap the **App** box and then tap **Contacts**,
- vi. Use the search option or scroll down to find your friends from your contact list.
- vii. Tap the **Invite** button next to the friends you want to add to your friends list.
- viii. Your friends will receive an introductory text/email message, a referral code and a link to the app store or the Moshe website.

**Note:** After your friends have downloaded the app and accepted your friend request, they will show up in your Friends list where you can invite them to your events.

b. How do I remove friends from my friends list?

- i. After selecting Friends from the navigation bar, tap **Manage Friends**.
- ii. Tap the **box(es)** to add a check next to the people you want to remove from your friends list.
- iii. Tap **Remove** and then tap **YES** on the popup screen.
- iv. Tap the **back arrow** in the top-right corner to navigate back to the main screen.

c. How do I manage my groups?

**Note:** All the groups you belong to, whether you created the group or whether you were added to a group on someone else's phone, will show up in your Friend Groups. You will only be able to edit or remove the groups you create. You will be able to select participants from any of the groups on your phone for your events. The groups you created will have the three dots on the right side of the group.

- i. Tap the **three dots** on the group you want to edit or delete.
- ii. Select by tapping **Edit** or **Delete**.
- iii. Edit option:
  - 1. Tap to check or uncheck the people you want to add or remove and tap **Continue**.

2. Tap the picture and select a new picture from your photo gallery or take a new picture with your phone camera.
  3. Tap the **Group Name** field and **enter a new group name**.
  4. Tap **Update Group** at bottom of the screen and tap **Continue** on the popup confirmation screen.
- iv. Delete Option:
    1. Tap **Delete** and the group will be removed.
- d. How do I create a new group?
- i. Select **Create Group** to see your list of friends.
  - ii. Tap the **box(es)** next to the friends you want to add to your new group.
  - iii. Add a **Picture** (optional) and **Group Name** (required) for your new group.
  - iv. Select **Create Group**.
  - v. The new group is added to your list of groups.

## 17. How do I chat with other participants in my events?

**Note:** You can communicate with event participants or the friends you have added to your friends list on Moshe.

- a. Event participant chat option:
  - i. Tap **Events** from the Navigation bar.
  - ii. Tap on the desired **event**.
  - iii. Tap the **chat icon** in top-right corner of the screen.
  - iv. Type your message in the message entry box. Tap the **Paper Clip** in the message field and then select the image or document you want to include with your message.
  - v. Tap the **enter arrow** to the right of the message entry box.
  - vi. Tap the **back button** to navigate back to the main screen.
- b. Friends list chat option:
  - i. From the main screen, tap **Friends** on the navigation bar.
  - ii. Tap the **chat icon** next to the friend you would like to chat with.

- iii. Type your message in the message entry box. Tap the **Paper Clip** in the message field and then select the image or document you want to include with your message.
  - iv. Tap the **enter arrow** to the right of the message entry box.
  - v. Tap the **back button** to navigate back to the main screen.
- c. Groups list chat option:
- i. From the main screen, tap **Friends** on the navigation bar.
  - ii. Tap **Groups**.
  - iii. Tap the **chat icon** next to the group you would like to chat with.
  - iv. Type your message in the message entry box. Tap the **Paper Clip** in the message field and then select the image or document you want to include with your message.
  - v. Tap **enter** to the right of the message entry box.
  - vi. Tap the **back button** to navigate back to the main screen.

## 18. How do I manage my Moshe subscription?

**Note:** The basic version of Moshe is a **free download**. We are working on some exciting enhancements including an event registration feature and a personalized event calendar. We are considering a small subscription fee for these upgrades to help cover the cost of development. But for now, enjoy the free download!

- a. Tap the **drop-down menu** from the top-left of the screen.
- b. Tap **Manage Subscription**.
- c. Tap **Choose Your Plan**.
- d. Select your preferred subscription plan, tap the **box** for automatic renewals and then tap **Continue**.
- e. Tap the **back arrow** to return to the main screen.

## 19. How do I contact Moshe if I have questions or comments?

- a. Tap the **drop-down menu** from the top-left of the screen.
- b. Select **Contact Us**.
- c. Enter a **short title** in the Subject field.
- d. Enter a **full description** of your inquiry in the description field.

- e. Optional: Tap the **upload icon** in the Upload Image field. Select your document.
- f. Tap **Submit** and then tap **Done** on the popup confirmation screen.
- g. We will send a response to your question at your email address as quick as we can!

20. How does the Moshe Referral Rewards Program work?

- a. There is no limit to the number of referral points that can be earned! Each time you share Moshe with a friend or family, they will receive a referral code. If they use your referral code when they add the Moshe app to their phone and create an account using your referral code, you get money added to your Moshe Referral Reward account. You can use your rewards to pay for convenience fees.

21. Where can I find the Moshe Terms and Conditions?

- a. Tap the **drop-down menu** from the top-left of the screen.
- b. Tap **Terms and Conditions**.
- c. Tap **Done** in the top-left of the screen when you are ready to return to the main screen.

22. Where can I find the Moshe Privacy policy?

- a. Tap the **drop-down menu** from the top-left of the screen.
- b. Tap **Privacy Policy**.
- c. Tap **Done** in the top-left of the screen when you are ready to return to the main screen.

23. How can I find out about the Moshe team?

- a. Select the **drop-down menu** from the top-right corner of the main screen.
- b. Tap **About Us**.
- c. Tap **Done** in the top-right when you are ready to return to the main screen.

24. Can I rate the Moshe App?

- a. Select the **drop-down menu** from the top-right corner of the main screen.
- b. Tap **Rate App**.
- c. You will be directed to the app store where you can rate the app.
- d. Close out of the app store and return to Moshe.

25. How do I delete my account?

**Note:** Your friends will not be able to add you to any events if your account is deleted.

- a. Select the **drop-down menu** from the top-left corner of the main screen.
- b. Tap **Delete Account**.
- c. Tap **YES** and your account will be deleted.

26. Where can I find my Notifications?

- a. Tap the **drop-down menu** from the top-left of the main screen.
- b. Tap the **Back Arrow** when you are ready to return to the main screen.

OR

- c. Tap the **Notification Icon** in the top-right corner of the main screen.
- d. Tap the **Back Arrow** when you are ready to return to the main screen.

27. How do I Logout of Moshe?

- a. Tap the **drop-down menu** from the top-left of the main screen. Tap **Logout** at the bottom of the list.

## Event Organizers

2. How do I create a Quick Pay Event?

**Note:** You can save your event as a draft by selecting **Save As Draft** in the top-right corner. You can access your draft event from the Draft category at any time and finish it.

**Note:** Before creating your quick pay event, make sure your friends list is updated with all the friends you want to invite to the event. See instructions for adding friends at: How do I manage my list of friends and family?

- a. Tap **Events** on the navigation bar.
- b. Tap **Create Event** or the **red plus icon**.
- c. Tap **Quick Pay**.
- d. Tap **Fixed** (if you know the exact amount you want to collect from each participant) **OR** tap **Calculated** (if you want help figuring out the amount you want to collect from each participant).

#### Fixed Pay Option

- e. Required: Enter the **Cost Per Participant** and tap **Continue**. You will get a popup notification letting you know you can't make refunds or adjustments using the fix pay option. You will need to use the Calculated Pay option if you need to make a refund or adjustment at the end of the event. Tap **Okay** to continue or tap **Cancel** to go back and select another payment option.
- f. Continue at step h. Enter details for the event.

#### Calculated Pay Option

- g. Required: Enter the **Estimated Event Cost** and **Estimated Number of Participants**. The Per Participant Cost is displayed. Select **Continue**.
- h. Enter details for the event:
  - i. Optional - Tap **picture icon** to add a picture for your event:
    1. Select **Gallery** if you want to use the photos from your phone OR
    2. Select **Camera** if you want to take a picture.
  - ii. Required - Enter the **Event Name**. **Note:** Each event name must be unique. You will get an error message if the event name has already been used. Try using the same event name but add a number or letter at the beginning or end.
  - iii. Optional – Enter the event **Description**. The description will help participants better understand your event.

- iv. Calculated Pay Option: The Estimated Event Cost, Estimated Number of Participants and Cost per Participant are carried forward from previous screen.
- v. Required - Enter the **Max Attendees**. **Important:** This number is necessary if there is a limit on the number of people that can attend the event, such as seats on a bus. If there isn't a limit, enter 999 or a number sufficiently higher than the expected number of invited participants.
- vi. Required – Enter the event **Location**.
- vii. Required – Enter the event start **Time**.
- viii. Optional – Tap the **Upload Document** and select a document to add to your event. (e.g. copy of an invoice).
- ix. Required – Enter the event **Start** and **End** dates.
- x. Required – Select whether you will be joining the event and paying your share of the expenses – **Yes OR No**.
- xi. Required – Enter the **number of days** you want to wait after the event end date to move the event to the completed category. Events are moved to completed status to clear them out of the Past Due category. Payments can still be collected after the event moves to completed status. The default is 20 days, which will hopefully be enough time to collect all the payments. Moving the events to the Completed category will clean out and keep your other categories manageable. **Hint:** Adjust the number of days if you think it will take more than 20 days past the event end date to collect all payments.
- xii. Tap **Continue** to proceed to the Invite Members page. You will get a popup notification explaining the move to completed status. Tap **Okay** to proceed OR **Cancel** to go back.
- i. Tap **Friends** and/or **Groups** to invite participants to the event. **Note:** You can select any combination of the entire group, specific people within a group, and/or specific people from the Friends list.

- j. Tap **Groups** and the list of your groups or groups created by other event organizers that that you were a part of.
- k. **Tap the group(s)** you want to use. Deselect anyone on the list by removing the check next to their name.
- l. Tap **Friends** to access your list of friends: **Add a check** in the box next the friends you want to invite. **Tap Continue**. Tap the box next to the question at the bottom of the screen if you want to create a new group. **HINT:** Recommend creating a new group for each event.
  1. Enter details for the group:
    - a. Optional – Tap the **Picture Icon** to add a picture for your event:
      - i. Tap **Gallery** if you want to use the photos from your phone OR Tap **Camera** if you want to take a picture.
      - ii. Required – the name of the event is carried forward and used for the name of the group. Each group name must be unique. An error message will appear if you enter a name that has already been used. **Hint:** If necessary, add a number or letter at the beginning or end of the group name to make it unique.
      - iii. Tap **Create Group** and you will get a popup confirmation showing your group was successfully created. Tap **Continue** on the popup screen.
      - iv. If you need to make a change, tap the **Back Arrow** button in the top-left corner, make your changes and then tap **Continue** until you get back to Create Event option.
    - m. If everything looks good, tap **Create Event** and you will get a popup notification. Tap **Okay** to proceed OR **Cancel** to go back and make the necessary changes.
    - n. After you tap Okay, you will get a popup confirmation showing your event has been successfully created. Tap **View Event** on the popup screen to see a summary of your event.
    - o. Tap the **Back** arrow to go back to the main screen.

### 3. How do I create a Plan Pay Event?

**Note:** You can save your event as a draft by selecting **Save As Draft** in the top-right corner. You can access the event from the Draft category at any time and complete it.

**Note:** Before creating your Planned Pay event, make sure all the friends you want to invite to the event are included in your friends list. See: How do I manage my list of friends and family?

- a. Select **Events** from the navigation bar.
- b. Click on Create Event button or the **red plus icon**.
- c. Select the **Plan Pay** option.
- d. Select **Fixed** (if you know the amount you want to collect from each participant) or **Calculated** (if you want help figuring out the amount you want to collect from each participant).

#### Fixed Pay Option

- e. Enter the **Cost Per Participant** and select **Continue**. Go to step h. below.

#### Calculated Pay Option

- f. Required: Enter the **Estimated Event Cost** and **Estimated Number of Participants**. The Cost Per Participant is displayed.
- g. Tap **Continue**.

#### h. Enter the details for the event:

- i. Optional - Click on **Upload Event Image** to add a picture for your event:
  1. Tap **Gallery** if you want to use the photos from your phone OR
  2. Tap **Camera** if you want to take a picture.
- ii. Required - Enter the **Event Name**.
- iii. Optional – Enter the event **Description**. The description will help participants better understand your event.

Fixed Pay Option: The Cost Per Participant is carried forward from previous screen.

Calculated Pay Option: The Estimated Event Cost, Estimated Number of Participants and Per Participant Cost are carried forward from the previous screen.

- iv. Required – Enter the event **Location**.
- v. Enter the event **start time**.
- vi. Optional – tap **upload icon** and select document (e.g. copy of an invoice) from your photo gallery.
- vii. Required – Enter the event **Start** and **End** dates.
- viii. Required – Enter the **Start** and **End** dates for when people can join.
- ix. Required - Select whether the event will be **Public** OR **Private**.

**Note:** The Public option allows the friends invited by the Organizer to share the event with others by inviting them from their own Friends' lists. The Private option limits the event participants to only the friends invited by the Organizer.

- x. Required – Select whether you will be joining the event and paying your share of the expenses – **Yes** or **No**.
- xi. Tap **Continue** to proceed to the Invite Members screen.
- xii. Tap **Friends** and/or **Groups** to invite friends to the event.

**Note:** You can select any combination of the entire group, specific people within a group, and/or specific people from the Friends list.

1. Tap **Groups** and the list of your groups or groups created by other event organizers that that you were a part of:
  - a. Tap the **group(s)** you want to use. Deselect anyone on the list by removing the check next to their name.
2. Select Friends to access your list of friends:
  - a. **Add a check** in the box next to the friends you want to invite.

- b. Add a check in the box if you want to create a new group.
    - c. Tap Continue.
  - xiii. Creating a New Group **IS RECOMMENDED**. If you elect to Create a New Group:
    - 1. Enter details for the group:
      - a. Optional - Tap Upload Event Image to add a picture for your event:
      - b. Tap Gallery if you want to use the photos from your phone OR
      - c. Tap Camera if you want to take a picture.
      - d. Required – the name of the event is carried forward and used for the name of the group. Each group name must be unique so an error message will appear if you enter a name that has already been used. **Hint:** If necessary, add a number or letter at the end of the group name to make it unique.
      - e. Select Create Group and you will get a popup confirmation showing your group was successfully created. Select Continue on the popup screen.
  - xiv. Select whether you want to be reimbursed with a series of payments – YES OR NO. Note: the total amount to be collected will be spread evenly over the days selected.
    - 1. If YES, a calendar will appear. Tap the dates you want the payments to be made.
    - 2. Tap the Select Time and enter the time of day the payment reminders will be sent out. Tap OK when finished.
  - xv. Tap Continue to move to the Create Event screen.
  - xvi. If you need to make a change, tap the Back Arrow button in the top-left corner, make your changes and then tap Continue until you get back to the Create Event screen.

- xvii. If everything looks good, tap **Create Event** and you will get a popup confirmation showing your event has been successfully created. Tap **View Event** on the popup screen to see a summary of your event.
- xviii. Tap the **Back** arrow to go back to the main screen.

4. How can I make a refund or adjustment if the event cost is more or less than my original estimate?

**Note:** The refund/adjustment option is only available with the Calculated Pay option.

**Note:** You can do a one-time refund (if you collected more than the cost of the event) or one-time adjustment (if you didn't collect enough to cover the cost of your event).

- a. Tap **Events** on the navigation bar.
- b. Slide the event categories to the left until you can see the Past Due or Completed categories. Tap the **Past Due** or **Completed** category.
- c. Tap the **event** you want to make a refund/adjustment.
- d. Scroll down to the bottom of the screen and tap **Any Refunds or Adjustments?**.
- e. Actual Event Cost popup screen.
  - i. Enter the **actual cost** in the Actual Event Cost field. The app calculates the Actual Cost Per Participant and the Difference between the Estimated and Actual Cost Per Participant. The option at the bottom of the screen will indicate whether it's a refund or adjustment.
  - ii. If you would like to make a refund or adjustment, tap the **Make Refund** OR **Make Adjustment** at the bottom of the screen.
    - 1. If you choose not to make a refund or adjustment, tap **on the top of the screen** and then tap the **back arrow** to move back to the main screen.

- iii. The screen will show everyone who has joined the event along with the payments they have made. Tap the **box** to remove the check next to anyone that you want to exclude from the refund or adjustment.
- iv. Tap **Allocate Cost** button to move to the Allocate Cost popup screen.
- v. Select how you want to allocate the cost by tapping one of the **allocation options**.
  1. Equal – the difference between the actual and estimated event cost will be allocated equally amongst the selected members.
  2. Actual – the difference between the actual and estimated cost can be allocated amongst the selected members in different amounts by entering actual amounts. Enter amounts next to the participants until the amount allocated is equal to zero.
  3. Percentage - the difference between the actual and estimated cost can be allocated amongst the selected members in different amounts by entering percentages. Enter percentages next to the participants until the amount allocated is equal to zero.
- vi. After making your entries for your allocation, tap **Request Payment** or **Make Refund** button at the bottom of the screen.
- vii. Tap **YES** on the popup confirmation to complete the refund/adjustment and then tap **DONE** to move back to the main screen.

5. How can I edit or delete an event before payments have been made?

**Note:** Events can only be edited or deleted while they are in the Draft or Upcoming event categories. Events cannot be edited or deleted if the event is in the Active event category.

**Note:** Events cannot be deleted after a payment has been made.

- a. Select an event from the Draft or Upcoming event categories.
- b. Tap the **red dots** in the top-right corner.
- c. Tap **Edit** or **Delete**
- d. If you selected Delete, tap **YES** on the popup screen and the event will be removed.
- e. If Edit was selected, the Add Event screen will be available.
- f. Make the necessary changes and if you are not quite ready to create the event, select Save as Draft from top-right corner of the screen so you can come back and work on it later. If you are ready to create the event, continue through the event setup screens and then tap the Create Event button. See instructions for creating an event at: How do I create a Quick Pay event? OR How do I create a Plan Pay event?

6. How do I cancel (delete) an event that has not started, and payments have already been received?

**Note:** Events in the upcoming category cannot be deleted after a payment has been made.

- a. Tap **Events** from the navigation bar on the main screen.
- b. Tap the **Upcoming** category.
- c. Scroll down until you see your selected event.
- d. Tap the **three red dots** in the top-right corner of the event. If a payment has not been made, the Delete option will be available on the dropdown menu. Tap **Delete**.
- e. Tap **Yes** on the popup screen.

7. What's the difference between Public vs. Private option when I create a planned pay event?

The Public option allows the friends invited by the Organizer to share the event with others by inviting them from their own contact lists.

The Private option limits the event participants to only the friends invited by the Organizer.

## Event Participants

1. How do I accept a friend request?
  - a. Tap **Friends** from the navigation bar on the main screen.
  - b. Tap **Manage Friends**.
  - c. Tap **Friend Requests**.
  - d. Tap **Accept** next to the friend request.
  - e. Tap the **Back Arrow** to go back to the main screen.
  
2. How do I join an event I was invited to?
  - a. You will receive a text message inviting you to join the event.
  - b. Login to Moshe and select **Events** from the navigation bar on the main screen.
  - c. Slide the event categories to the left until you see Pending Invites. Tap **Pending Invites**.
  - d. Tap the desired **event**.
  - e. Scroll down until you see the options to Join Event or Decline Event. Tap **Join Event**.
  - f. You have the option to Pay Now (at the bottom of the screen) or you can exit the screen. The event will be available in the Upcoming or Active event categories depending on the event start date. You can select the event at any time to make payment.
  
3. How do I make a payment for an event I have joined?
  - a. Select **Events** from the navigation bar on the main screen.
  - b. Tap the **desired event**.

**Note:** If there are multiple payments, they will be listed in the middle of the screen with the due dates. You can pay one or all the payments while on this screen.
  - c. Scroll down and tap **Pay Now**. A popup screen with the payment summary will appear. Tap the **box** next to the Use Referral Amount if

you would like to use your referral rewards to pay for the convenience fee.

- d. Move the **Slide to Pay** button to the right.

**Note:** You will receive an error message if there are not enough funds in your Moshe wallet to cover the cost. Tap the **Wallet Icon** from the top-right corner. See instructions on how to fund your Moshe wallet at: [How do I manage funds in my Moshe wallet?](#) After you have added sufficient funds to your Moshe wallet, go back to the top of this FAQs section and follow the instructions to finish making payments for your events.

- e. After making the payment, tap the **back arrow** to go back to the main screen.
- f. Tap the **Wallet icon** in the top-right corner if you would like to see the payment transactions in your Moshe wallet.

#### 4. How do I share a Public event with my friends?

**Note:** Make sure your Moshe Friends list is up to date because you can only invite friends to events who have been added to your Friends list on Moshe. See instructions for adding friends at: [How do I share Moshe with friends and family?](#)

**Note:** The Public option allows friends invited by the Organizer to share the event with others by inviting them from their own Friends' lists. The Private option limits the event participants to only the friends invited by the Organizer.

**Note:** The Public option is only available for Plan Pay events.

- a. Select **Events** from the navigation bar on the main screen.
- b. Tap the **Upcoming** events category.
- c. Tap the **Share Icon** in the top-right corner of the screen to take you to the Share Events screen.
- d. Tap the **box(es)** next to the friends you want to share the event with.

- e. Tap the **Share Now** button. A invitation text message will be sent out to the invited friends. The invited friends can accept the invite and join the event.
5. What happens if the Organizer decides to issue a refund or request a payment because the event cost was more or less than the original estimate?

**Note:** An event Organizer can make a one-time refund or adjustment request. Refunds show up as a deduction on the event screen and an addition to your wallet. Adjustments show up as an additional payment on the event screen.