



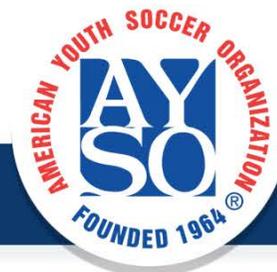
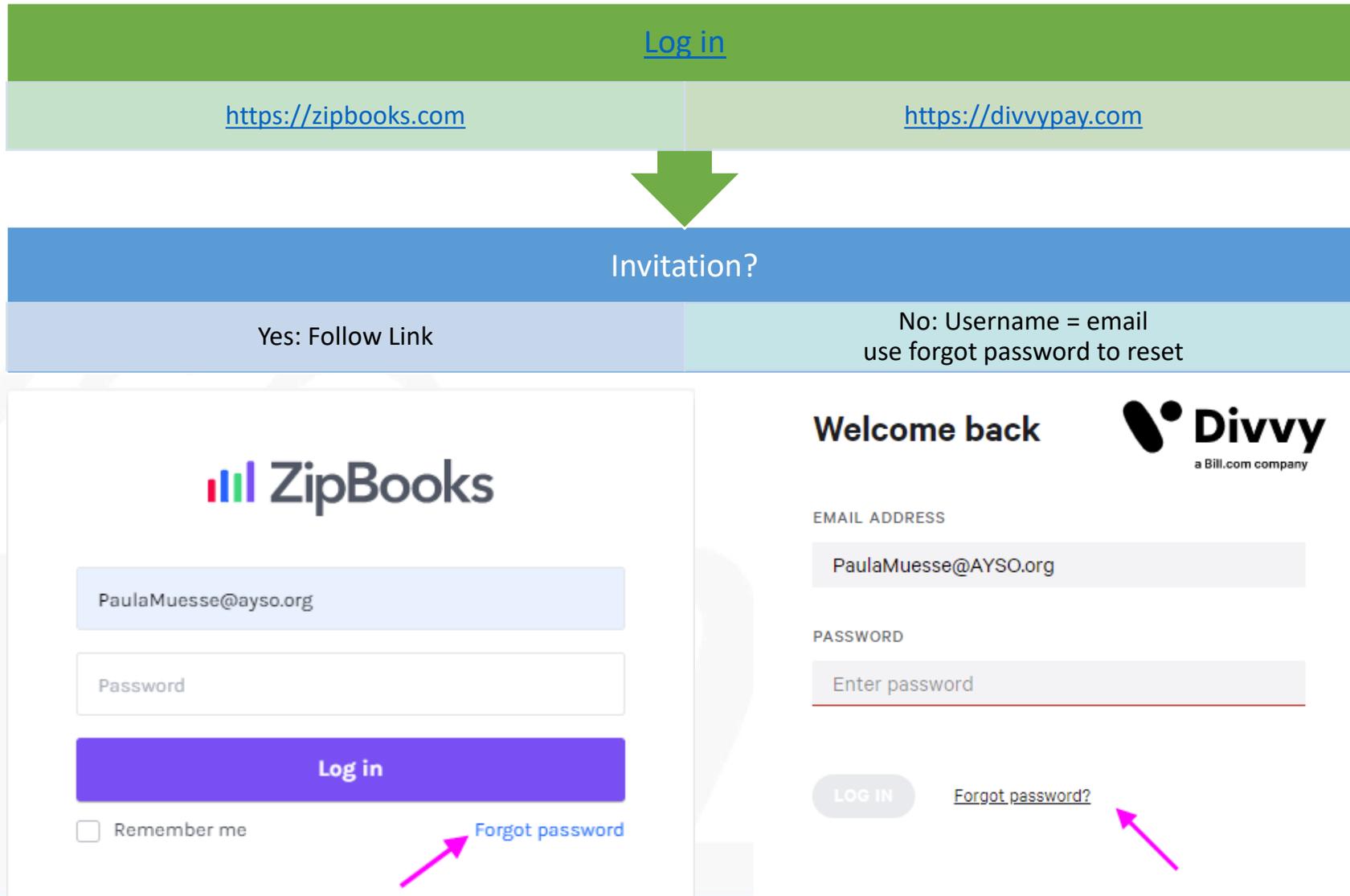
AMERICAN YOUTH SOCCER ORGANIZATION

DIVVY Getting Started

EVERYONE PLAYS® BALANCED TEAMS OPEN REGISTRATION POSITIVE COACHING GOOD SPORTSMANSHIP PLAYER DEVELOPMENT

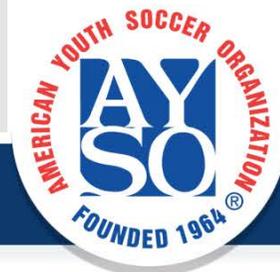


ACCESS TO DIVVY & ZIPBOOKS



DIVVY

People	<ul style="list-style-type: none">• Adding• Removing	Anyone who needs to spend money or submit expenses for reimbursements should be a Divvy user.
Budgets	<ul style="list-style-type: none">• Creating• Modifying	Everyone needs funds to spend with Divvy. From a single budget to multiple budget categories, you can organize Divvy to meet your spending management needs.
Cards	<ul style="list-style-type: none">• Virtual• Physical	Virtual cards can be created for many different use cases – one card for each vendor or subscription. Physical cards can be ordered for in store purchases.
Spending	<ul style="list-style-type: none">• Receipts• Categorize Expenses	Viewing transactions, categorizing and attaching receipts for transactions is easy!
Payments	<ul style="list-style-type: none">• Timing• Prepay up to 9x your credit limit*	Divvy will automatically withdrawal the full balance owed on the 1 st of each month.
Reimbursements	<ul style="list-style-type: none">• Mileage• Other expenses	
Divvy Transactions in Zipbooks	<ul style="list-style-type: none">• Import >10 transactions/month• Key < 10 transactions/month	



People

- Adding
- Removing

TO ADD A PERSON

- In the left-hand navigation Menu, click People
- Click the Add Person button
- When the Add Person window opens, fill out the person's information.
 - Email is unique and will be the username
 - Choose **Admin** (can create people and cards) or **Member** (spend only)
 - Send invite allows them to set their password and access their account
 - If you order a physical card, be sure and update the address (default is the Office)

TO EDIT/REMOVE A PERSON

- From the list of People, click the name of the person you wish to edit/remove
- Click the Options button
 - Note: Deleting a person locks their transaction history. Might be better to freeze card initially.

People

IMPORT PEOPLE ADD PERSON

Search + ADD FILTER

NAME	EMAIL	ROLE	PHYSICAL CARD STATUS	BUDGET COUNT
AP	...	Member	Active	2
AN	...	Admin	Not activated	2
AC	...	Member	Not activated	3
AR	2

American Youth Soccer Org / People / AYSO Region Test

AR AYSO Region Test

Options

- Edit person
- Order physical card
- Reset MFA
- Reset password
- Delete person

Overview Transactions Budgets Settings

Spend snapshot

\$0

\$0

\$0

...

Budgets

- Creating
- Modifying

BUDGET NAME	BUDGET TYPE	LIMIT	SPENT	ASSIGNED	AVAILABLE
Cecilio's Budget	Recurring				
Finance/Accounting Team	Recurring				
General	Recurring				
Matthew's Budget	Recurring				
Patricia's Budget	Recurring				
Paula's Budget	Recurring				
Risk Management	Recurring				

ABOUT BUDGETS

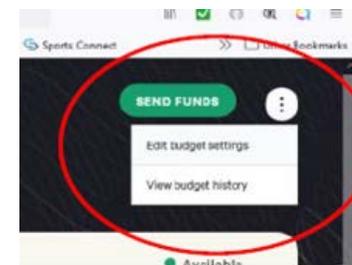
- The default General budget = Credit Limit
- A budget limits the card and can be set to recurring (monthly) or No Interval (single use, can expire)
- Sum of all budgets can be > Credit Limit
- Credit Limit is the *ultimate* spending limit

CREATING A BUDGET

- Select Budgets from the left-hand navigation
- Click the Create New Budget button
 - Name your budget
 - Estimate spend from this budget
- Budget owners = approvers
- Budget members = spenders

EDITING A BUDGET

- From the Budgets page, in the upper right-hand corner, use ellipses (3 dots)
- Select Edit Budget Settings



Cards

- Virtual
- Physical

The screenshot displays the AYSO software interface. On the left, a navigation menu includes 'Company', 'Transactions', 'Budgets', 'Cards', 'People', 'Statements', 'Reimbursements', and 'Integrations'. The 'Budgets' menu item is highlighted with a green box. The main area shows the 'General' budget screen for 'March 1 - 31'. It features a progress bar for 'Spent' (-\$49.29) and 'Available' (\$248.81). Below this is a table of 'Spend limits' with columns for 'NAME', 'TYPE', 'LIMIT', and 'SPENT'. A 'CREATE CARD' button is visible in the bottom right of the budget screen. A 'Create card' modal is open on the right, showing fields for 'CARD NAME' (Untitled card), 'BUDGET SETTINGS' (General), 'SET A LIMIT' (toggle on), 'RESET LIMIT MONTHLY' (toggle on), 'SECURITY' (Set card expiration), and 'CARD HOLDER'.

VIRTUAL CARDS

- Virtual cards are created in the Budget screen or the Cards screen
- From the Budget screen select a Budget to start
- Click the Create Card button
 - Name your virtual card e.g. Sterling Volunteers
 - Set a Limit and/or a Monthly Limit
 - Add a Card Holder – they must be in your People list
 - Pre-assign expense (NAP) categories
 - Confirm
- From the Cards screen click the Create New Card button

PHYSICAL CARDS

- Physical cards can be ordered by selecting Cards>Physical Card Orders in the left-hand navigation
- Click the Order Physical Card button in the upper right hand corner
- Physical cards can also be ordered from the People>Options screen
 - Change the address to the new card owner
- Physical cards have the Budget of the card owner

Spending

- Receipts
- Categorize Expenses

Company

Transactions

Pending and cleared

Declined

Payments

Adjustments

Fees

Budgets

Cards

People

Transactions

Q Search **EDIT FILTERS** Clear filters

25 results \$5,303.36 BULK ACTION

Start Date: 2/1/22 x End Date: 2/28/22 x Name: Paula Muesse x

	SYNC	STATUS	DATE	NAME	MERCHANT	AMOUNT	CARD	BUDGET	MCC	DESCRIPTION	NAP CODES
<input type="checkbox"/>		Complete	2/28/22	Paula Muesse	Yozons Esignatures	\$700.00	6928 - Paula Virtual ...	Paula's Budget	8999	esig	7610 - Computer Sof
<input type="checkbox"/>		Complete	2/27/22	Paula Muesse	GoDaddy	\$21.20	3641 - GoDaddy	Paula's Budget	4816	url	8465 - Website Expe
<input type="checkbox"/>		Complete	2/25/22	Paula Muesse	Reservations.com	\$383.95	9018 - Physical Card	Paula's Budget	4722	13 EXPO Hotel	7420 - Lodging
<input type="checkbox"/>		Complete	2/25/22	Paula Muesse	Reservations.com	\$19.99	9018 - Physical Card	Paula's Budget	4722	13 EXPO - Hotel Reservation Ser	7495 - Travel Other

Transaction details

INCOMPLETE

Paula Muesse

MICROSOFT*365

\$20.00

Cleared 03/23/22
Authorized 03/22/22
+20 Rewards points

VIRTUAL CARD
Paula Virtual Card

REQUIRED FIELDS*

RECEIPTS

Click or drag files here
Files supported: PDF, JPEG, PNG

BUDGET
Paula's Budget

1 - EXPENSE CATEGORY
Select...

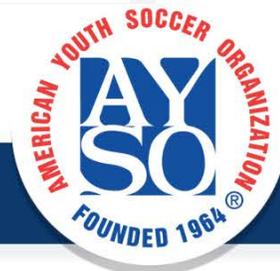
DESCRIPTION

View Transactions

- Select Transactions from the left-hand navigation
- Filter Transactions: by date, by owner, by status – Complete, Incomplete

Categorize Transactions

- Select a Transaction by clicking the row, Transaction Details will open
- Upload or drag and drop the receipt
- Select the expense category (NAP Code) from the drop down
- Add a short description
- Confirm



Payments

- Timing
- Prepay up to 9x your credit limit*

Company dashboard

Credit info

CREDIT LIMIT: \$500,000.00



● BALANCE ⓘ \$379.57

● AVAILABLE \$620.43

[REQUEST CREDIT INCREASE](#)

Rewards ⓘ

REWARDS POINTS

29,960

[Calculate dollar value](#)

[REDEEM](#)

[REWARDS DETAILS](#)

Account payment info

ACCRUED AMOUNT DUE ⓘ

\$379.57

This is subject to change.

AMOUNT DUE ON

4/1/2022

LAST PAYMENT

\$693.86

Paid on 3/7/2022

BILLING CYCLE

Billed monthly on the 1st

Automatic payment

[MAKE A PAYMENT](#)

[PAYMENT HISTORY](#)

PAYMENTS

- Select Company from the left-hand navigation
- Your Company Dashboard will show
 - Total amount due
 - Date of next payment
 - Available Credit Limit
 - Billing Cycle

MORE CREDIT

- For one-time expenses (Uniforms) you can pre-pay your Divvy Card 9 x Credit Limit
 - Click Make Payment button and enter amount of the payment
 - Allow 4 business days to process
- Change your billing cycle from Monthly to Bi-Weekly or Weekly (email request to change)
- Request Credit Limit Increase from your Section Director. Send a copy of your most recent bank account.
 - Do not use the Request Credit Increase button

Reimbursements

- Mileage
- Other expenses

- Company
- Transactions
- Budgets
- Cards
- People
- Statements
- Reimbursements**

Reimbursements

Search

BUDGET APPROVAL \$590.85 ADMIN APPROVAL \$74.88 READY TO PAY \$0.00 PAYMENT PENDING \$562.18 PAID \$9,816.43

<input type="checkbox"/>	STATUS	DATE	NAME	MERCHANT/MILEAGE	AMOUNT	BUDGET	RECEIPT
<input type="checkbox"/>	ADMIN APPROVAL	2/28/22	SS Scott Snyder	128 Miles	\$74.88	Scott's Budget	

NEW REIMBURSEMENT

BULK ACTIONS

Create a new reimbursement

Out of Pocket
For purchases where you couldn't use Divvy.

Mileage
Get reimbursed based on how far you drove

REQUESTING

- Select Reimbursements from the left-hand navigation, click the New Reimbursement button
- Select Out of Pocket or Mileage (calculation is based on IRS limits)
 - For an **out-of-pocket reimbursement**, enter the merchant's name, amount, transaction date, the **budget**, category, and receipt.
 - For a **mileage reimbursement**, enter the trip date, the number of miles traveled, the **budget** and category.
- In the New Reimbursement screen, be sure to click the LINK BANK ACCOUNT button to designate where the payment should be deposited.

APPROVAL

- There must be sufficient budget to cover the payment
- Reimbursements do not affect or consider your Credit Limit
- The transaction is IMMEDIATELY withdrawn from your bank account on Approval

Divvy Transactions in Zipbooks

- Import >10 transactions/month
- Key < 10 transactions/month

AYSO - Region Divvy ID: 10480
WEX ID: 606726
Funding source: Divvy Corporate
Underwriting method: FS
Deal source: AYSO (AYSO)

Transactions
Pending and cleared
Declined Payments Adjustments Fees
17 results

Search + ADD FILTER

SYNC	STATUS	DATE	NAME	MERCHANT	AMOUNT	CARD	BUDGET
<input type="checkbox"/>	INCOMPLETE	3/1/21		Amazon.com	\$18.48	7216 - Physical Card	General
<input type="checkbox"/>		3/9/21		Amazon.com	\$8.89	7216 - Physical Card	7695: Misc
<input type="checkbox"/>		3/9/21		Amazon.com	\$76.63	7216 - Physical Card	7695: Misc
<input type="checkbox"/>		3/8/21		The Home Depot	\$18.47	7216 - Physical Card	7695: Misc
<input type="checkbox"/>		3/8/21		Office Depot	\$8.91	7216 - Physical Card	7695: Misc

Filter transactions

DEFAULT FILTERS

SYNC: Select...

STATUS: Select...

DATE RANGE: From To

NAME: Select a person/people

AMOUNT: \$ Min \$ Max

- IN DIVVY>select **Transactions** – picture of a receipt, left-hand navigation
- Edit your transaction table to display Notes and NAP Codes columns.
- Filter transactions to the period you are working in (e.g. March 1 – March 31)
- Once filtered, click Export. Select CSV.
- ****IMPORTANT**** you must paste the resulting CSV data (values only) into the **Import Template** – this removes unwanted formatting and columns (please **DOWNLOAD** the template)
 - Use the Paste Divvy Data tab for the exported transactions
 - Download the ZipBooks Formatted Data tab as a CSV
 - Save the CSV to select
- IN ZIPBOOKS>select **Transactions**, select Import and choose your saved CSV file. **IMPORT!**
- RECONCILE>Review balance sheet to make sure all activity has been captured.

Transactions

Filter by invoice, contact, or other tags

Category	Amount	Description
Mar 10	\$135.00	Check #1299 Checking - 5947 Registration Fee Refunds
Mar 10	\$333.00	Deposit checking - 5947 Merchandise Revenue
Mar 9	\$1,690.16	Blue Sombrero checking - 5947 Registration Fees 99%
Mar 7	\$100.00	Check #1291 checking - 5947 Registration Fee Refunds
Mar 7	\$1,001.12	Divvy checking - 5947 Divvy Credit Card 92%
Mar 7	\$1,919.08	Square checking - 5947 Sales 98%

Import 1 of 100 of 327

Import Type: Standard

Importing transactions is easy! Just follow these 4 simple steps.

1. Download our Transaction Import CSV template. [Banking Transactions](#)

Other Tips

Make sure your account names match exactly with the name you gave it in ZipBooks. Another area to double check is making sure you put the sales or deposits in the correct column and the expenses or withdrawals in the other column. For advanced accounting, deposits are debits to the account name in ZipBooks and expenses are credits to the account name.

You can do your accounting or categorization in the

Choose or drop formatted CSV here:

Choose File No file chosen

Import

DIVVY VISA ADOPTION DEADLINE 3/31/23



SOLUTIONS ▾

PRODUCT ▾

RESOURCES ▾

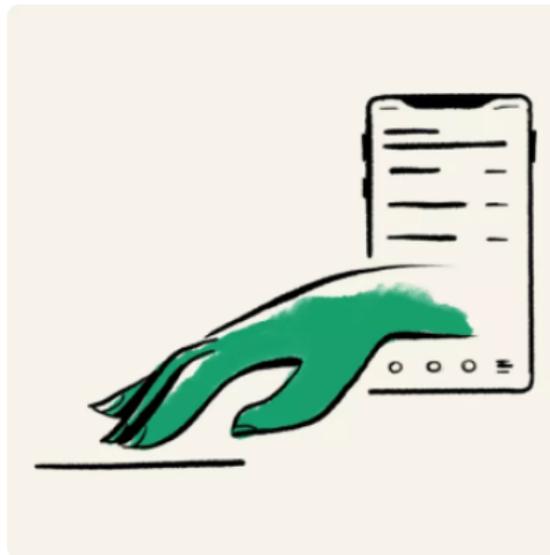
Divvy just got better with Visa.

As if Divvy cards weren't smart enough, we're excited to announce the Divvy Visa® Business card. Get ready for the best business card experience out there.

JOIN THE WAITLIST



Adopt Early? Ashley.Beckstead@divvypay.com



Divvy Visa Business card benefits:

Use your card at your favorite locations.

Easier dispute resolution.

Pay faster and more safely with tap-to-pay, Google Pay and Apple Pay.

Enjoy a sleek, newly designed physical card.



EVERYONE PLAYS®

BALANCED TEAMS

OPEN REGISTRATION

POSITIVE COACHING

GOOD SPORTSMANSHIP

PLAYER DEVELOPMENT



DIVVY HELP



AYSO Financial
Management Toolkit
Members 526

<https://band.us/@aysofinancialtoolkit>



help@getdivvy.com



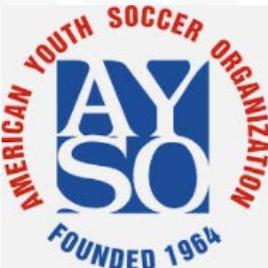
<https://app.divvy.co> bottom left-hand corner



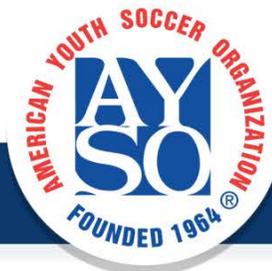
Live Help Desk – Sunset 3
Friday 9:00 – 6:15
Saturday 8:00 – 4:45



<https://www.youtube.com/watch?v=zCa-oOZNiFc>



finance@ayso.org



AYSO EXPO 2022

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OPEN REGISTRATION

POSITIVE COACHING

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PLAYER DEVELOPMENT

