DIVVY
Getting Started

ACCESS TO DIVVY & ZIPBOOKS

DIVVY

People	•Adding •Removing	Anyone who needs to spend money or submit expenses for reimbursements should be a Divvy user.
Budgets	•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	•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	•Receipts •Categorize Expenses	Viewing transactions, categorizing and attaching receipts for transactions is easy!
Payments	•Timing •Prepay up to 9x your credit limit*	Divvy will automatically withdrawal the full balance owed on the 1st of each month.
Reimbursements	•Mileage •Other expenses	
Divvy Transactions in Zipbooks	•Import >10 transactions/month •Key < 10 transactions/month	
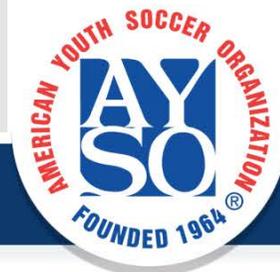
TO ADD A PERSON

- 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 <u>unique</u> 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.

Budgets

- Creating
- Modifying

Budgets

SEND FUNDS   CREATE NEW BUDGET

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				

Left navigation:
Company
Transactions
Budgets
  Active budgets (11)
  Retired budgets (1)
Cards
People
Statements
Reimbursements
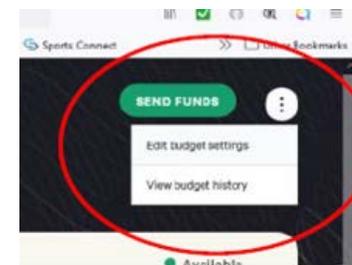Integrations

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

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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

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Spending
- Receipts
- Categorize Expenses

Transactions

Company
Transactions
- Pending and cleared
- Declined
- Payments
- Adjustments
- Fees

Budgets
Cards
People

Search | EDIT FILTERS | Clear filters

25 results
$5,303.36
BULK ACTION

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

SYNC	STATUS	DATE ▲	NAME	MERCHANT	AMOUNT	CARD	BUDGET	MCC	DESCRIPTION	NAP CODES
	Complete	2/28/22	Paula Muesse	Y Yozons Esignatures	$700.00	6928 - Paula Virtual ...	Paula's Budget	8999	esig	7610 - Computer Sof
	Complete	2/27/22	Paula Muesse	GoDaddy	$21.20	3641 - GoDaddy	Paula's Budget	4816	url	8465 - Website Expe
	Complete	2/25/22	Paula Muesse	R Reservations.com	$383.95	9018 - Physical Card	Paula's Budget	4722	13 EXPO Hotel	7420 - Lodging
	Complete	2/25/22	Paula Muesse	R 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
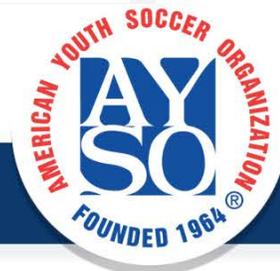
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PAYMENTS
- Select Company from the left-hand navigation
- Your Company Dashboard will show
  - Total amount due
  - Date of next payment
  - Available Credit Limit
  - Billing Cycle

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

Create a new reimbursement

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

Mileage — Get reimbursed based on how far you drove

Company
Transactions
Budgets
Cards
People
Statements
Reimbursements

Reimbursements

Search

NEW REIMBURSEMENT

BULK ACTIONS

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

	STATUS	DATE	NAME	MERCHANT/MILEAGE	AMOUNT	BUDGET	RECEIPT
☐	ADMIN APPROVAL	2/28/22	SS Scott Snyder	128 Miles	$74.88	Scott's Budget	📄

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

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Divvy Transactions in Zipbooks
- Import >10 transactions/month
- Key < 10 transactions/month

- 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.

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DIVVY VISA ADOPTION DEADLINE 3/31/23

Adopt Early? Ashley.Beckstead@divvypay.com

DIVVY HELP

ZipBooks
Divvy
AYSO Financial
Management Toolkit
Members 526

https://band.us/@aysofinancialtoolkit

Divvy
a Bill.com company

help@getdivvy.com

Help

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

Ready! Set!
AYSO EXPO
2022

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