Group Staff Quick Start Guide

This guide will walk you through:

- ✓ How to set up your Snap! Spend account
- ✓ Performing and managing transactions on Snap! Spend
- ✓ How to get answers to your Snap! Spend questions

This guide includes clickable links and instructions for set up on our website. If you need additional assistance, please visit our Support Center.

SNAP! SPEND

Snap! Spend Overview

Banking

End-to-end financial management. Snap! Spend combines everything you need to run your team or club in one system, saving you time and giving you a complete picture of your finances.

Budgeting

Budget, track expenses, and share. Snap! Spend gives you an easy way to budget for anticipated expenses and track any spending against your budget.

Payments

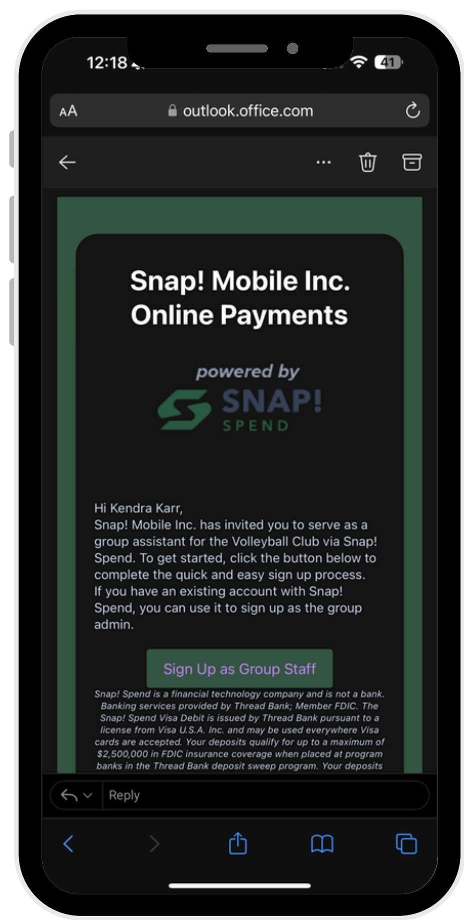
Organize, track, and accept team funds. Snap! Spend summarizes your collections progress and directs your attention to the important stuff, like which payments and players need your attention.

Security

Families receive an online portal to manage and pay their dues, secured with the same bank-level encryption used by major financial institutions.

How do I sign in to Snap! Spend?

Your Program Admin will send you an email invitation to sign in to Snap! Spend. For step-by-step instructions, please click here!



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How do I set up my team?

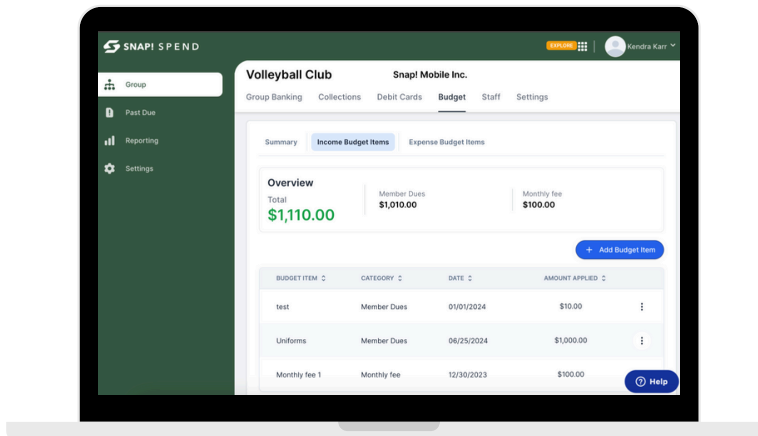
We recommend the following action items to set your team up for success:

- ✓ Adding Budget Items
- ✓ Adding a Payment Schedule
- ✓ Adding Participants to the Roster
- ✓ Inviting Parents/Guardians

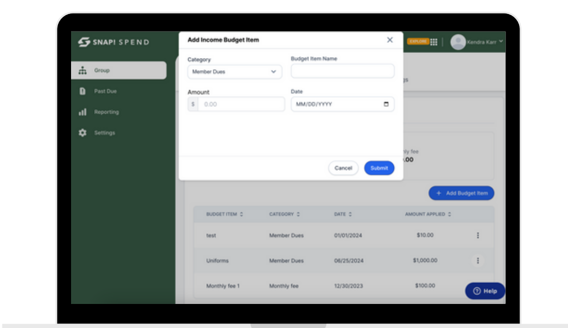
Adding Budget Items:

🔔 Your Progam Admin should have already communicated budgeting expectations + policies

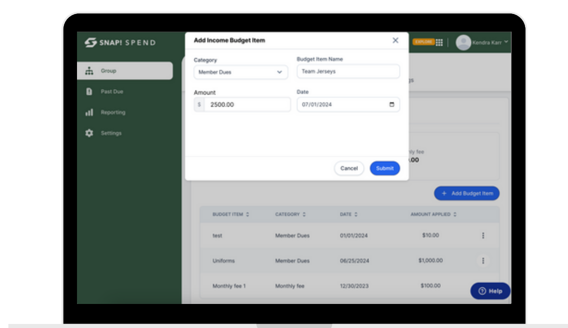
🔔 Adding income and expense budgeting items first is crucial during set up because you will have to select where invoice payments from parents will be reconciled



Click Budget from the top navigation tabs and click either Income or Expense Budget Items.



Click the blue + Add Budget Item button



Select the appropriate budget category and enter all relevant information. Click Submit.

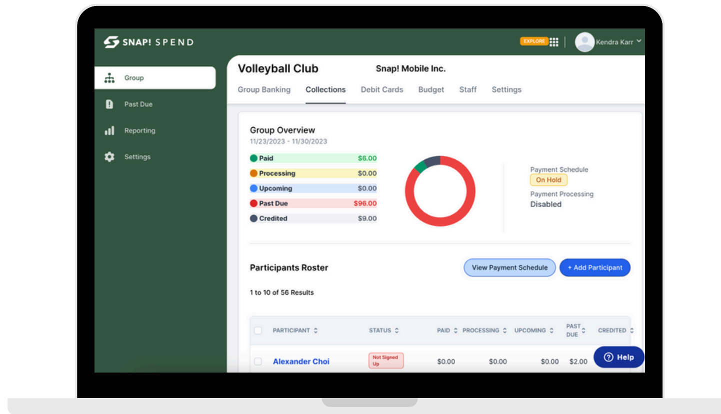
💡 The amount is referring to the full amount you expect to collect for this budget item for all participants. The date is arbitrary here—select any date you'd like or refer to your Program Admin for guidance.

Adding a Payment Schedule:

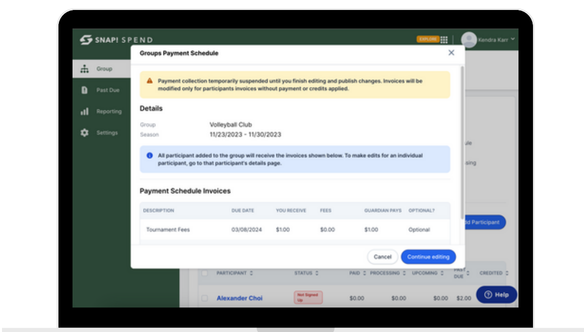
🔔 A payment schedule is a collection of invoices

🔔 This payment schedule should include invoices that apply to the entire team, but you can edit individual invoices later!

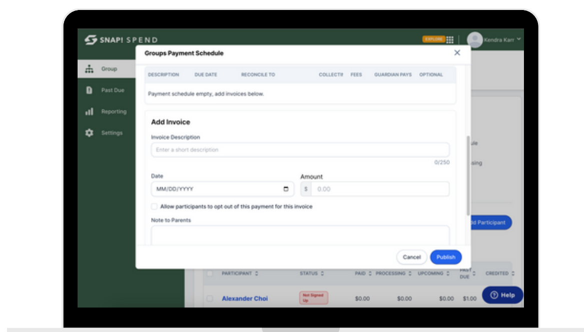
🔔 Setting up and publishing your payment schedule does not automatically invite parents/guardians. You can invite them once you have your team fully set up.



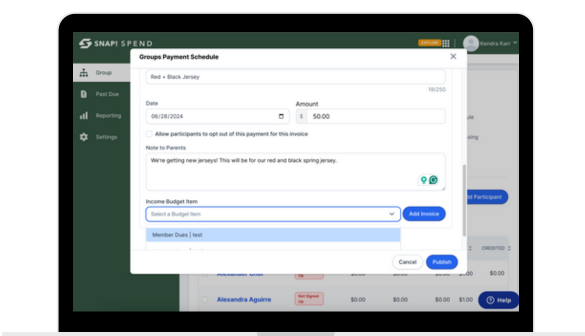
Click the Collections tab at the top and click View Payment Schedule.



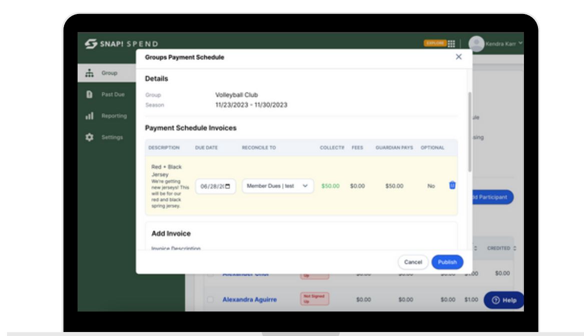
Click Continue editing.



Scroll down to the Add Invoices section and begin entering the relevant information.



Once you add your information, select the appropriate budget item for the invoice payment to be reconciled to. Click Add Invoice.



Once your invoice is added, it will be highlighted in yellow at the top. Add all invoices and click Submit.

💡 The payment schedule has to be published in order for parents/guardians to be able to make payments.

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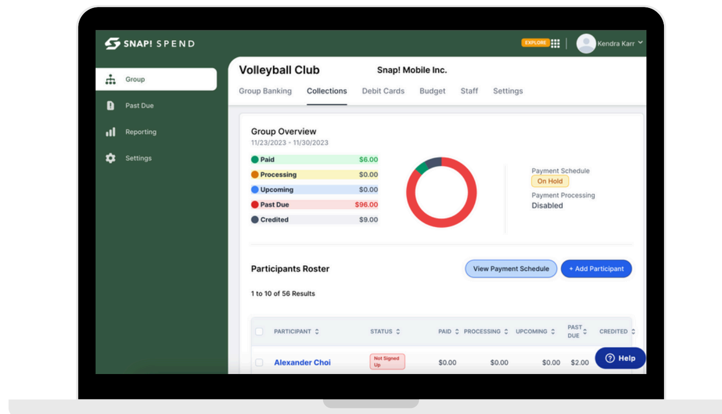
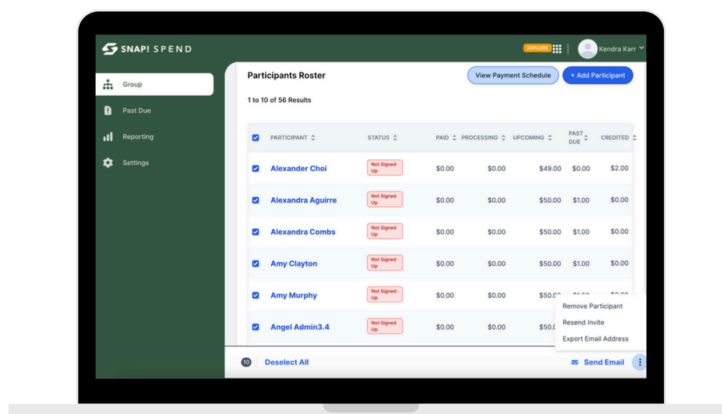
Inviting Parents/Guardians:

- This should be the last step of your setup to make sure you have your team fully set up!

- When adding a participant later in the season, they will not be automatically invited. Every time you add a participant ,they will need to be invited.



Navigate to the Collections tab at the top to view your roster.



To invite parents/guardians, select the checkbox at the top to select all participants. Click the 3 dots in the bottom right-hand corner, and click Send Invite (or Resend Invite to re-invite them).

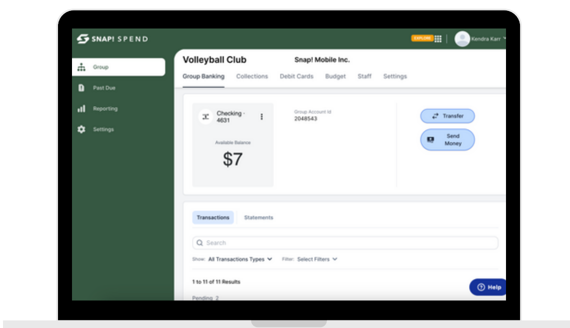
How do I perform banking transactions?

Snap! Spend allows you to:

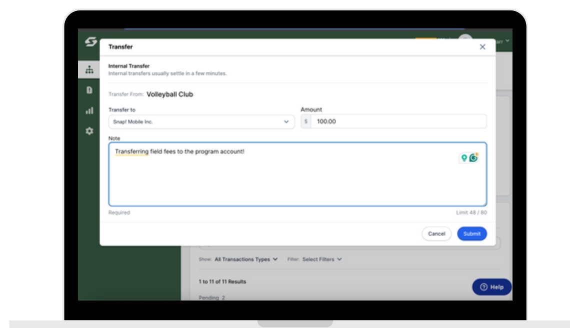
✓ Transfer Funds
✓ Send Checks
✓ Mobile Deposit

Transfer Funds:

🔔 As the Group Staff, you can internally transfer to other groups within your organization.



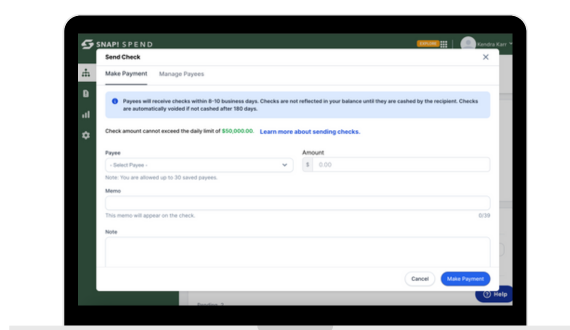
Navigate to the Group Banking Tab and click Transfer.



Select the group you'd like to transfer funds to, enter the relevant information, and click Su

Send Checks:

🔔 As the Group Staff, you can send checks to pay for external vendors.



Click Send Checks under Transfer, Add a Payee, amount, check memo, and note. Click Make Payment.

💡 Need more help with Sending Checks? [Click here for our support article.]

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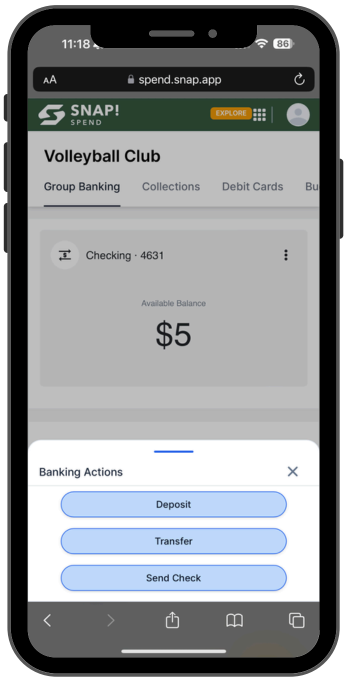
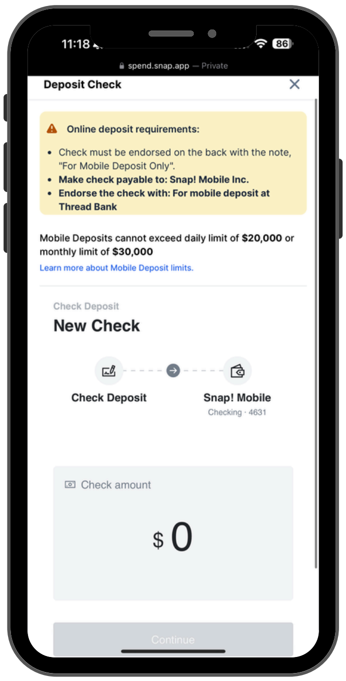
Making a Mobile Deposit:

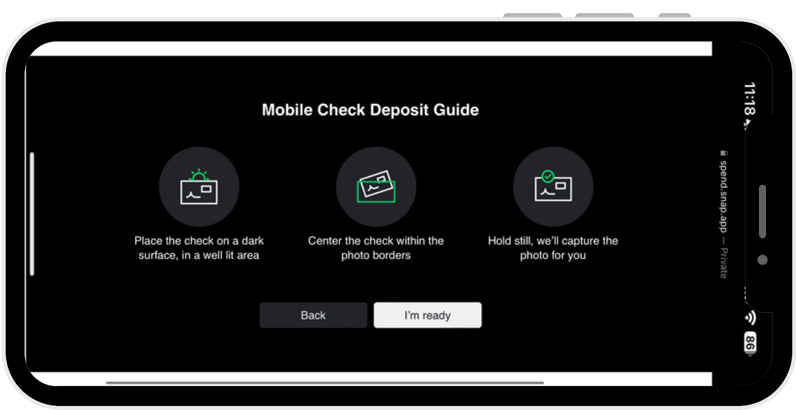
🔔 Depositing a check is exclusive to your mobile browser to make it easy to take a picture of your check.



Click the blue + button and tap Deposit



Read the prompts carefully!



Follow the on-screen prompts to capture your check and deposit to your Snap! Spend account.

💡 Need more help with Mobile Deposits? Click here for our support article.

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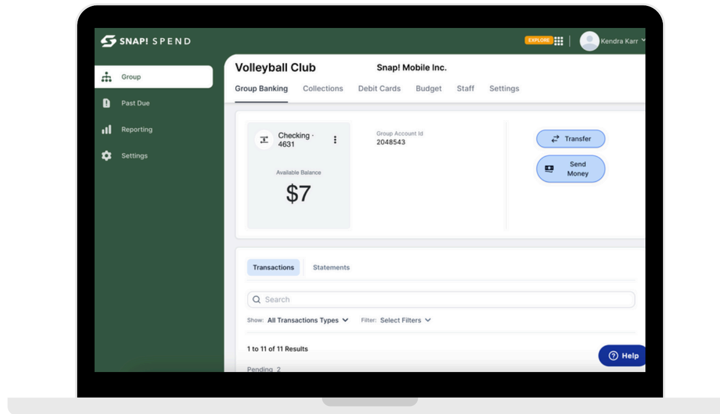
How do I manage my transactions?

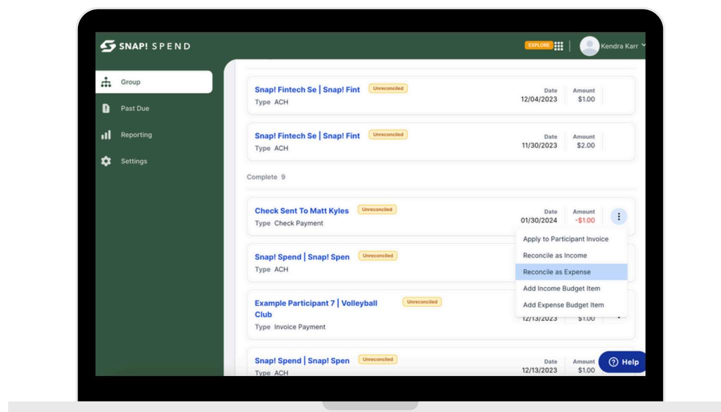
Snap! Spend allows you to reconcile transactions to the budget for easy transaction management!



Navigate to the Group Banking tab. This will be the main page for reconciliation.

Reconciling Transactions:

- Invoice payments will be automatically reconciled to the pre-set budget item.
- Expense payments will need to be manually reconciled to the budget.
- Discuss with your organization to see how often they prefer you to reconcile transactions!



Scroll down to find an unreconciled transaction, click the 3 dots, and select where you'd like to reconcile the transaction.

💡 Need more assistance? We highly encourage you to [click here to take our Group Staff Course!]

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What do I do if I have questions?

We have a Support Center that you can easily access and search for questions. Also, our Help Desk is always happy to answer any of your questions, or you can contact your program directly if you have any program-specific questions!

Visit our Support Center to find how-to articles:

Group Staff Resources

Contact the Snap! Spend Help Desk if you have questions about:

- You have any technical issues or questions related to the website or your account.
- You're getting an error message somewhere on your Snap! Spend account.
- You're having an issue with your Snap! Spend login or password.

Contact your program directly if:

- You have a question about your budget or when to reconcile transactions.
- You need a debit card.
- You have a club policy question.

Snap! Spend Help Desk

spend.support@onsnap.com

7:00 AM-6:00 PM CST

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