TOURNEY DIRECT

TOURNEY DIRECT OPERATOR PORTAL · HOW-TO GUIDE

# Paying teams from Tourney Direct: getting started

Send a team its fundraiser payment straight from Tourney Direct. The money comes from the bank account you use for payroll, the team gets the full amount, and you and the team both get a receipt. This guide covers the one-time setup for you and for each team, then how to send.

- Team receives the full amount
- Paid from your payroll account
- Kept separate from payroll
- Receipts emailed automatically

## The whole picture

**1 Set up your payroll account** → **2 Add the team** → **3 Send the setup link** →
**4 The team finishes setup** → **5 Staff and check in** → **6 Send the payment**

Steps 1 to 4 happen once. After that, every event is just steps 5 and 6. New to Team Fundraisers? The **Team Fundraisers Quick Start guide** covers adding teams, marking players and team totals in more detail.

## Before you start

**You need**

- Your EIN set up and approved in **Payroll** (step 1)
- Permission to approve payroll (and to be a **payroll approver**, if your organization has set them)
- Each team's contact name and email, plus a mobile number to text the link
- Each team's organization type and state

**Each team needs**

- The organization's legal name and EIN
- The organization's bank account
- A person to set it up, such as a treasurer, coach or school business office
- That person's own SSN for a standard identity check

Paying teams from Tourney Direct is turning on one account at a time. If you don't see **Set up for payments** on the Teams tab, it isn't on for your account yet. Email Kate@TourneyDirect.com.

## 1. Set up your payroll account

Left menu → **Payroll** → **Organization**

Teams are paid from your organization's payroll account, so your EIN has to be set up and approved first. If you already run payroll with Tourney Direct, you're done with this step.

1. Start **Company setup** for your EIN.
2. **Only paying teams?** Choose **1099 only** as the payroll type. That skips tax setup, employees and work locations.
3. Finish the business verification: business documents, proof of good standing, the owner's ID, your bank account and the agreements.
4. Add your **payroll approvers**. Once they're set, only approvers can send team payments.

**Start early.** Business verification can take a few days, and each team needs time to finish its own setup. Start a couple of weeks before you plan to pay.

## 2. Add the team

Left menu → **Team Fundraisers** → **Add a team**

1. Enter the **team or organization name**, like "Westlake HS Lacrosse Boosters".
2. Pick the **type**: Club team, High school, College, Nonprofit, or Business or LLC.
3. Choose the **organization type** and **state**. Most schools, booster clubs and nonprofits are **Nonprofit, school or other**. If you're not sure, ask the team before you send the link.
4. Add the **team contact**: the person who will set up the team's payment account, with their email and mobile.
5. Click **Save team**.

Teams are organizations, never one person. For college teams, payment usually goes to the school or its athletics foundation.

## 3. Send the team its setup link

Team Fundraisers → **Teams** → **Set up for payments**

1. On the team's card, click **Set up for payments**.
2. If you have more than one EIN, choose the account you'll pay from.
3. Check the organization type, state and contact details. The type and state can't change after the link is sent.
4. Click **Send setup link**. The contact gets it by text and email.

TEAM FUNDRAISERS · TEAMS · TEAM STATUS

| STATUS | WHAT IT MEANS | WHAT TO DO |
|---|---|---|
| **Set up for payments** | No link sent yet | Send the setup link |
| **Setup link sent** | Waiting on the team contact | **Check now**, or **Resend link** if they lost it |
| **Ready for payments** | The team can be paid | Nothing, you're set |
| **Needs attention** | Set up as a person, or without the organization's EIN | We're notified. Resend the link so the contact can fix it |

## 4. The team finishes setup

The team contact, from the texted or emailed link (about 10 minutes)

### Share this with the team contact before they start

1. Have the organization's **legal name, EIN and bank account** ready.
2. When asked for the **organization type**, choose the organization's type. Most schools, booster clubs and nonprofits choose **Other**. **Don't choose Individual / sole proprietor**, or the team can't be paid.
3. You'll be asked for **your own Social Security number** to confirm your identity. It's a standard security check. The money goes to the organization's bank account, not to you.
4. Sign the W-9 and connect the organization's bank account.

When they finish, the team's card changes to **Ready for payments**. You never see their tax or bank details.

## 5. Staff the event and check in

Event Staff → **Schedule** → **Pay** view, then **Event day**

Schedule the team's players on Event Staff like anyone else. In the **Pay** view, check the players working for the team and click **Pay to team**. On event day, check-in works as usual. Each player's earnings count toward the team once they check in, and no-shows count as $0.

Agreed on a set amount with the team? On Team Fundraisers, click **Adjust** on the team's row and set a **Flat amount**.

## 6. Send the payment

Team Fundraisers → **Payouts** → **Ready to send**

1. Once the event has started, the team shows under **Ready to send** with its total.
2. Click **Send** on the team's row.
3. Check the amount, event, pay date and account, then click **Send**.

THE SEND BOX

Send

**$1,650**

to **Westlake HS Lacrosse Boosters**

| | |
|---|---|
| From | Your payroll bank account |
| For | Fall Classic |
| Based on | 11 workers, 66 hrs |
| Pay date | Mon, Nov 2 |
| Receipt | Emailed to you and the team |

Paying several teams? Click **Send all**. Each team is sent on its own, and you'll see a result for each one.

| YOU SEE | WHAT IT MEANS |
|---|---|
| **Sent** | The payment is on its way. It's in History with its pay date. |
| **Confirming** | We're checking that it went through. Don't send it again; it updates on its own. |
| **Not sent** | Nothing was paid. The reason is shown. Fix it, then click **Send again**. |
| **Needs attention** | Something went wrong after sending. It's locked, and we're on it. |

When the payment arrives, you and the team contact each get an emailed **receipt**. Every payment is in **History**, and **Export CSV** gives you a file for your books.

## Good to know

### Never paid twice

A team can't be paid twice for the same event. A second click, a second tab or a retry won't send another payment.

### Amounts are re-checked

The total is checked again when you send. If it changed, you'll review the new amount before anything goes out.

### Setup is re-checked too

Before every payment, we confirm the team is still set up as an organization. A team set up as a person is never paid.

### Can't be undone

Once a payment is sent, it can't be pulled back here. Check the amount before you send.

### Separate from payroll

Team payments don't show up in your payroll runs, statements or payroll accounting entries.

### Record payment still works

Paying a team another way? Use **Record payment** so your records stay in one place.

### Taxes

Tourney Direct doesn't provide tax advice. Check with your accountant on how to record team payments in your books.

More help: help.tourneydirect.com → Team Fundraisers

Questions? Click Ask Teddy in your portal, or email info@tourneydirect.com