

FREE GUIDE

The Activity Director's Guide to Going Cashless for the New School Year

How to simplify clubs, events, payments, forms, approvals, and check-in - without creating more work for your office.

Plan ahead | Reduce cash handling | Keep accounting clean

A practical resource for making payments, forms, approvals, reporting, and event check-in easier to manage before the rush begins.

Created by **omella**

Collect payments, information, and digital signatures in one place.

Why this guide exists

Every school year starts with the same goal: run smoother events, reduce last-minute scrambling, and make it easier for families to pay, register, and participate.

But activity directors and school leaders often inherit a complicated mix of cash boxes, checks, paper forms, spreadsheets, email approvals, and accounting requirements. The problem is not that schools lack effort. It is that the process is often fragmented.

The goal

Help activity directors and principals plan a more organized, mostly cashless school year while keeping existing accounting processes intact.

What cashless should actually mean

Going cashless does not have to mean replacing every system your district already uses. For many schools, the practical goal is simpler: collect payments and information digitally, reduce manual work, and give accounting clean records to reconcile.

- Payments: families can pay online instead of sending cash or checks.
- Forms: required information, waivers, and approvals are collected with the payment.
- Reporting: staff can see who paid, who completed forms, and what still needs attention.
- Check-in: events can move faster because issues are solved before families arrive.
- Accounting: exports and reports are prepared in a format your office can use.

Planning principle: cut down the surface area

The fewer systems parents and staff need to learn - and the fewer tools your office has to manage, support, and reconcile - the easier it is to keep everyone aligned. One clear process is easier to communicate, train on, and repeat.

The biggest cashless opportunities for the new school year

You do not need to digitize everything at once. Start with the workflows that create the most repetitive work, confusion, or cash handling.

Use case	What to digitize
Club dues	Annual or semester dues, membership forms, optional donations, and roster updates.
Homecoming and dances	Ticket sales, outside guest approval, attendance rules, and event-day check-in.
Fundraisers	Team or club campaigns, parent sharing, donor tracking, and goal progress.
Concessions and event sales	Faster sales, cleaner reporting, and less cash handling at busy events.
Camps, clinics, and tryouts	Registration, waivers, payment, capacity limits, and participant lists.
Field trips and special events	Permission slips, payments, emergency info, and deadline tracking.
Merchandise and spirit wear	Size collection, payments, fulfillment notes, and inventory-friendly reporting.

Where cashless transitions usually break down

Most issues happen because schools digitize one piece of the process but leave the rest manual. A payment link alone does not solve missing forms, unclear rosters, check-in problems, or accounting questions.

1. Payments and forms live in separate places, so staff still need to match records manually.
2. Club sponsors each use their own process, which makes reporting inconsistent.
3. Families are not sure where to pay, what they already submitted, or who to ask.
4. Event staff discover problems at the door instead of resolving them ahead of time.
5. Accounting receives messy exports or incomplete descriptions that require cleanup.

Planning principle

Do not just move cash online. Standardize the entire workflow: what is being collected, who owns it, what reports are needed, and how families will be reminded.

The 1-2-3 back-to-school setup

Instead of trying to fix every workflow at once, start with three decisions that make the rest of the year easier to manage.

1. Create one approval form for collections and fundraisers

Make the instructions simple for every sponsor, coach, club, and staff member: if you want to collect money, sell something, or run a fundraiser, start by filling out the approval form.

This gives the activity office one front door for requests and helps leaders make the right decision before a payment link, campaign, or event page is created.

- What is being collected, sold, or fundraised for?
- Who owns the activity and who needs access?
- Does this need administrator, ASB, sponsor, or bookkeeper approval?
- What information, waivers, signatures, or eligibility checks are needed?
- What reporting fields or account codes will accounting need later?

2. Standardize the few workflows you repeat most

Once the request is approved, route people into a small set of repeatable templates instead of letting every group invent its own process.

- Club dues and memberships
- Event tickets and outside guest approvals
- Fundraisers and donations
- Camps, clinics, field trips, and merchandise sales

3. Define the reporting and reconciliation plan upfront

Before anything goes live, decide what accounting needs to see, who reviews it, and how often exports or reports should be prepared. This prevents cleanup work after the event or fundraiser is already over.

- Required fields: club, event, fund, account code, student name, donor name, item, date, amount, and payment status.
- Review owner: activity director, sponsor, coach, bookkeeper, ASB clerk, or administrator.
- Timing: daily, weekly, after each event, or at the end of a campaign.

Helpful framing

A shorter setup process is easier to adopt. Start with one intake form, a few standard templates, and clean reporting rules. That is enough to reduce chaos without overwhelming your team.

What if your district already uses an ASB or accounting system?

Many activity directors want to modernize payments without disrupting the accounting process their district already relies on. That is reasonable. Going cashless should support your accounting workflow, not create more work for it.

A practical approach is to use one system to collect payments, forms, approvals, and check-in information, then provide clean exports or reports for accounting. This lets the activity office improve the front-end experience while accounting continues using the tools and categories it already needs.

- What fields does accounting need in the export?
- How should transactions be categorized by club, event, fund, or account code?
- Who reviews and approves reports before reconciliation?
- How often should exports be sent: daily, weekly, or after each event?
- What information should sponsors see, and what should remain restricted?

How to prevent long lines at events

Your school events are not larger than an NFL game or a major Broadway show, but the same lesson applies: move decisions and confusion out of the line. The smoother the prep is before doors open, the faster people move once they arrive.

Before the event

- Collect payment and required information together, not in separate systems.
- Send clear reminders with the purchase deadline, rules, guest policy, and check-in instructions.
- Review incomplete submissions before the event and contact families early.
- Export or prepare a final attendee list before doors open.
- Create a backup plan for students who arrive without confirmation.

At the event: check-in lines

- Scan student IDs if possible, because students forget or lose tickets.
- Scan QR code tickets as the next-best option when student ID scanning is not available.
- Use a system that lets staff look someone up quickly if they forgot their ID or ticket.
- Keep a printed backup list in case Wi-Fi or internet goes down.
- Separate normal check-in from problem resolution so one issue does not stop the entire line.

At the event: ticket-purchase lines

- Post a QR code so students or families can scan and purchase a ticket on the spot.
- Have a clear process for accepting cash or card at the door when needed.
- Keep purchase lines separate from check-in lines whenever volume is high.
- Assign one staff member to exceptions so the main line keeps moving.

Sample parent/student communication templates

Copy, paste, and adjust these templates for your school.

Collection approval instructions for staff

If your club, team, or activity needs to collect money, sell tickets, run a fundraiser, or gather required forms, please start by submitting the approval request here: [LINK]. Once approved, we will confirm the next steps and the correct payment/form workflow to use.

Club dues reminder

Reminder: club dues are due by [DATE]. Please complete payment and required information here: [LINK]. If you already submitted, no further action is needed. Questions? Contact [NAME] at [EMAIL].

Homecoming ticket reminder

Homecoming tickets are available until [DATE/TIME]. Students must complete payment and any required guest information before the deadline. Please review the event rules before purchasing: [LINK].

Event check-in reminder

To help check-in move quickly, please arrive with your student ID and make sure all required information has been submitted before the event. Students with missing information may be directed to the problem-resolution table.

A simple 30-day rollout plan

Timing	Focus	Action
Week 1	Build the approval form	Create one intake form for collections, fundraisers, events, and sales. Decide who reviews and approves requests.
Week 2	Create templates	Build standard workflows for dues, events, fundraisers, camps, field trips, and merchandise.
Week 3	Pilot one high-volume use case	Start with homecoming, club dues, a major fundraiser, or another visible workflow.
Week 4	Review and expand	Review reporting, family questions, staff workload, and check-in results. Then expand to more groups.

Planning worksheet

Use this worksheet to decide which workflows to digitize first.

Question	Notes
Workflow or event	Example: Homecoming tickets, robotics dues, football fundraiser
Owner	Who manages it?
Approval needed?	Who approves and by when?
Payment needed?	Yes / No / Optional donation
Information needed	Forms, waivers, shirt sizes, guest details, student ID, etc.
Check-in needed?	Yes / No
Accounting export needed	Fields, categories, account codes, timing
Parent communication	What reminder or FAQ is needed?

How Omella can help

Omella helps schools collect payments, information, and digital signatures in one place, with no monthly fee. Schools use Omella for fundraising, ticket sales, club dues, registrations, concessions, forms, approvals, and check-in.

For schools that still need to use an existing ASB or accounting system, Omella can support cleaner reporting and custom CSV exports so your team can keep the accounting workflow intact while simplifying the front-end collection process.

Want help mapping this out?

If your school is trying to reduce cash, simplify events, or standardize club and activity payments, Omella can walk through what this could look like for your school year.

Book a 15-minute conversation: <https://calendly.com/omella-sales/15-min>

Learn more: <https://omella.com>