



## Get Started Guide

The links below will take you to step-by-step instructions on how to accomplish each task in Mazlo. Need help? Reach out to your FSA representative.

- ☐ **Project Profile:** [Add Your Logo](#) to your organization to give some life to your profile!
- ☐ **Team:** [Invite Team Members](#) who need access to the platform.
  - ☐ Set their permissions based on the role they play for your organization.
- ☐ **Credit and Debit Card Donations:** [Create a donation campaign page](#) to start receiving donations via credit or debit card.
  - ☐ ALWAYS assign the accounting code: **"4000 - Donations"** for donation campaigns! This will ensure your donor is receiving their donation acknowledgement for their donation.
- ☐ **Payment Requests:** [Choose to make a payment via ACH, Wire, or Check](#) to pay a vendor, contractor, or reimburse a member of your team for out of pocket expenses.
  - ☐ Wire and check fees will be the responsibility of the Sponsee.
- ☐ **Debit Cards For Your Team Members:** Reach out to your FS representative to issue a virtual or physical debit card (we can do either!). View what team members have cards under this tab.
  - ☐ To ensure funds are being spent charitably and in compliance with your FS agreement, upload a description and receipt for card transactions.
  - ☐ After five transactions with missing receipts, your card will be inactive.
  - ☐ [How to find expenses missing receipts.](#)
- ☐ **Check Donations:** All check donations should be sent via mail to FSA at 3500 DePauw Boulevard, Suite 3090, Indianapolis, IN 46268. Please be sure the donor includes your program's name in the memo line!

## Information for Sponsees in Mazlo

### Key Features

- ☐ **Individual accounts** - Each sponsee will have their own bank account. A donor will just need your routing and account number, with no more need for the pledge form. This will make receiving donations via ACH and wire more convenient with a quicker turn around time on funds being available.
- ☐ **Link and use outside donation platforms** - Sponsees can create a donation-only Stripe account to use with outside platforms such as GiveBetter and GiveLively that will link to your Mazlo account. You will no longer have to wait for the funds to be received and then transferred by FSA to your account in Mazlo. Ask your FSA representative how to get this set up and ask how your organization can benefit!
- ☐ **Profit and Loss (P&L) Statement** - Download a profit and loss statement directly from your Mazlo account to attach to grant applications or send to your accountant. For a more in-depth breakdown of expenses and income throughout the month, download a transaction report for Quickbooks to view program codes assigned to transactions and donations.
- ☐ **Multiple options to pay vendors, contractors, or reimbursements** - When you submit a payment request, you can initiate an ACH, wire, or send a physical check. If you already have your vendor's banking information, you can include it on requests to get them paid faster!
- ☐ **International Wires** - Sponsees can pay or reimburse vendors or staff who are international, making international payments faster and easier for your program. Please ask your representative if you'd like to use this feature.
- ☐ **Accounting** - Sponsees can download an Excel sheet to provide to a bookkeeper, accountant or to support an accounting system like Quickbooks.
- ☐ **Sub-Accounts** - Set up restricted sub-accounts to your main account if your program wants to restrict funds to specific program activities.

## Receiving Donations / Using Funds

### Project Account Dashboard

- ☐ Where you can view funds available, banking details, and recent transactions.

### \$ Receiving Donations:

#### ACH and Wire Donations:

- ☐ [Download Banking Details to receive ACH and Wire donations directly into your account.](#)  
[Each program will have its own banking details, making it easier and faster to receive ACH and Wire donations.](#)
- ☐ All donations via ACH or Wire need the accounting code: 4000 - donations attached and marked complete!!
  - ☐ This ensures your donor receives their donation acknowledgment and the transaction is included on your P&L statement.

#### Check Donations:

- ☐ **ALL** Checks need to be mailed to Fiscal Sponsorship Allies, 3500 Depauw Blvd Ste 3090, Indianapolis, IN 46268 to be deposited into your Mazlo Account.

#### Donor-Advised Funds (DAF) Donations:

- ☐ To donate through a DAF, make a tax-deductible contribution to whichever Donor-Advised Fund you choose. Then, suggest a grant to Fiscal Sponsorship Allies. If the DAF offers a “memo” field or description box, please enter the intended fiscal Sponsee’s name.

#### Stock Donations

- ☐ Info for Stock Donations to FSA:
  - ☐ Vanguard’s DTC: 0062
  - ☐ FSA’s Brokerage Account: 15519506

### Using Donations for Charitable Expenses:

- ☐ **Submit Payment Requests** - How can you and your vendors, contractors, and staff be paid or reimbursed? [Choose to make payment via: Wire, ACH, or Check](#)
- ☐ Make sure to choose a contact or add a [new contact](#).

- ☐ You can request payment details **OR** input payment details to get your vendors and staff paid faster
- ☐ **Required Attachments:**
  - ☐ Accounting Code (Program Expenses),
  - ☐ Debit Amount (requested amount)
  - ☐ Description for request (how does this expense align with your charitable work?)
  - ☐ Attach a receipt or invoice
  - ☐ **Optional:** Payment Category, Program Code, Grant Name, Invoice Number
- ☐ **Set up Spend Cards** - Who needs a card? Reach out to your FS representative to issue a virtual or physical debit card. View what team members have cards under "Card"
  - ☐ Ensure funds are being spent charitably and in compliance with your FS agreement, upload a description and receipt to card transactions.
  - ☐ After 5 transactions are missing receipts, your card will be inactive.
    - ☐ [How to find expenses with missing receipts](#)

## Accounting and Program Codes:

### Accounting Codes:

- ☐ **Set up by FSA.**
  - ☐ **Every donation** will be assigned the accounting code: 4000 - Donations
  - ☐ **Every spend request** will also need to be tagged with the accounting code: 5000 - Program Expenses

### Program Codes:

- ☐ **Set up by FSA**
  - ☐ Every program will have a generic set of program codes set up when onboarded. These codes align with the tax-exempt application.
  - ☐ These codes can be used to categorize your donations and expenses to run easier reports. You are welcome to ask your FSA representative to add additional codes if you need!

## Mazlo Menu Breakdown:

### Transactions

- ☐ Under this page, you will be able to view all transactions going in and out of your program's account.
  - ☐ Here you can [filter these transactions](#) to narrow down what you are looking for (donations, expenses, transaction type, payment category, etc)
  - ☐ Export these transactions to an Excel spreadsheet or to complement QuickBooks

### Acknowledgements

- ☐ Here you can [view all donation acknowledgements](#) that have been sent to your donor for their donation. If a donor ever reaches out for this letter because they have misplaced or never received it, please use this tab to find it and send it to them!

### Mobile Deposits

- ☐ This **will not** be available for sponsees to utilize. ALL checks received by your organization need to be mailed to FSA at 3500 Depauw Blvd, Suite 3090, Indianapolis, IN 46268 for documentation and deposit.

### Requests

- ☐ How can you and your vendors, contractors, and staff be paid or reimbursed?  
[Choose to make payment via ACH, Wire, or Check.](#)
  - ☐ Wire and check fees will be the responsibility of the Sponsee.

### Internal Transfers

- ☐ A new feature in Mazlo will be sub-accounts. Sub-accounts are a way for your program to create mini accounts under your main account for any specific needs.

An internal transfer allows your program to restrict funds from your main account to a sub-account for its intended purpose.

### **Card**

- ☐ Reach out to your FS representative to issue a virtual or physical debit card. View what team members have cards under this tab.
  - To ensure funds are being spent charitably and in compliance with your FS agreement, upload a description and receipt for card transactions.
  - After 5 transactions are missing receipts, your card will be inactive.
  - How to find expenses missing receipts

### **Sub-Accounts**

- ☐ [Sub-accounts are a way for your program to create mini accounts](#) under your main account for any specific needs. Reach out to your FS representative to create your needed sub-account.

### **Contacts**

- ☐ [Contacts can be created to track donors, vendors, and team members.](#) Contacts can be created under this tab or when submitting a payment request.
  - ☐ New Feature: When paying a vendor, [you can attach their banking details directly to their contact information.](#)

### **Create Grant Budgets**

- ☐ [Track grants for your organization](#) - Grants that your organization has received can be tracked, including reporting requirements that need to be fulfilled.
  - ☐ New Feature: add external transactions if needed!

## Donations Campaigns

- ☐ [Customize a donation campaign for your program or a specific fundraiser!](#)  
Include a picture, tell your story, and set a funding goal. Even use Mazlo AI to help create your campaign!
  - ☐ **ALWAYS ASSIGN!!!**
    - ☐ **Accounting Code:** 4000 Donations
    - ☐ **Program Code:** 0001 Donations

## Settings

- ☐ **My Profile:** [Update your profile settings and choose your notification preferences](#)
- ☐ **Project Profile:** [Add Your Logo](#) to your organization to give some life to your profile!
- ☐ **Team:** [Invite Team Members](#) who need access to the platform.
  - ☐ Set their permissions based on the role they play for your organization.
- ☐ **Accounting:** [Download a Profit and Loss \(P&L\) statement.](#)
- ☐ **Integrations:** Sponsees can create a Stripe account strictly for donations to create other online giving platforms, like Give Lively, that integrate with Stripe!
  - ☐ Work with your FS representative to verify that the online giving platform uses Stripe and help integrate it into your Mazlo account.
- ☐ **Support:** [Check out Mazlo's knowledge base](#)

## FAQ

### **What happens after a donor contributes to my project?**

After a donor contributes to your project in Mazlo, the funds will be available in your account once processed. You are able to view how to download your banking information to share with donors in the Donation Information tab, under the heading “Receiving ACH and Wire Donations”. After a donor contributes via ACH or wire, navigate to the transaction under the “Transactions” page and add the accounting code.

### **How can someone donate to my organization in Mazlo via ACH or Wire?**

A donor can make a donation to your organization in Mazlo via ACH or wire through using your banking details that you can share with them directly or through donation campaigns that are created for your project in Mazlo. You will no longer need to use the pledge form to receive donations via ACH or wire.

### **Do I have to send donations acknowledgements to donors or are those still automatically sent?**

Donation acknowledgements will still be sent automatically by the FSA team to donors to your organization. If a donor does not receive the donation acknowledgement, you are able to resend the acknowledgement, if necessary, under the Acknowledgements tab on the sidebar on your home page.

### **How do I create debit cards for my project?**

To create a debit card for your project, you will need to reach out to your FSA rep with the contact information for the team member or volunteer who will need a card. Once you have provided that information, the card will be created and assigned to the necessary contact with the option for a virtual card (available immediately) or physical card (shipped and received within 5-7 business days).

### **What information do I need to attach to spend card transactions?**

Spend card transactions will still require you to attach the receipt from the transaction. When there are five transactions made using the debit card without receipts, the card will be frozen until the receipts have been uploaded to the transaction.

### **Where should check donations be sent?**

Yes, checks are still going to be mailed to Fiscal Sponsorship Allies. We are continuing this process to ensure compliance and proper documentation of funds that are received by each organization in Mazlo.

All checks should be mailed to the following address:

**3500 Depauw Blvd, Suite 3090, Indianapolis, IN 46268**

**What will happen to my recurring donors in Ribbon?**

Recurring donations will still be received through the end of the calendar year in Ribbon and transferred to your account in Mazlo at regular intervals. Your FSA rep will reach out to recurring donors to inform them of the transition to a new software platform and the steps necessary to set up their recurring donation in Mazlo to your organization.