Your Nonprofit is Merging Checklist

Throughout Rallybound's existence, we've had the privilege of partnering with great nonprofits that end up combining with another great nonprofit. These mergers can deliver many long-term benefits, but they can also be scary as you enter into the "unknown".

We want to make it as easy as possible for you. In an effort to do so we have created the following list of items that should be considered:

1. **Organization name.** The good news is you will only need to do this one time (assuming organization placeholders are used to pull in the org name). The org name can be accessed through your org admin (gray screen). Once you have logged in, select the small "i" located on the upper right hand side, below your profile image. In the screenshot below it is highlighted by a red box.

Once these details have been entered and saved, any "Organization" placeholders will now pull updated information.


2. **Payment processor.** This can either be done on an individual campaign level (access the campaign Admin Panel (blue screen) > Settings > Donation Options OR you can contact support to have this updated on an organization level. You'll want to ensure any transactions are being processed through the right entity.

3. **Emails**. Within each Rallybound campaign you will want to review all emails being sent (Admin Email Templates, Fundraiser Email Templates and Auto Responders) to ensure static text was not entered instead of a placeholder. Below is an example of both:
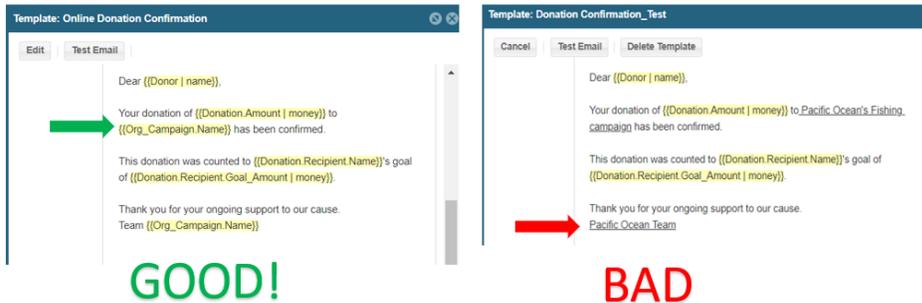
You'll also want to review the header and footer being used within the emails to ensure it contains the correct logo and organization name.

4. **Campaign Admin Panel > Settings > Campaign Settings > Email Options.** Replace with the correct email address that emails will be sent from.
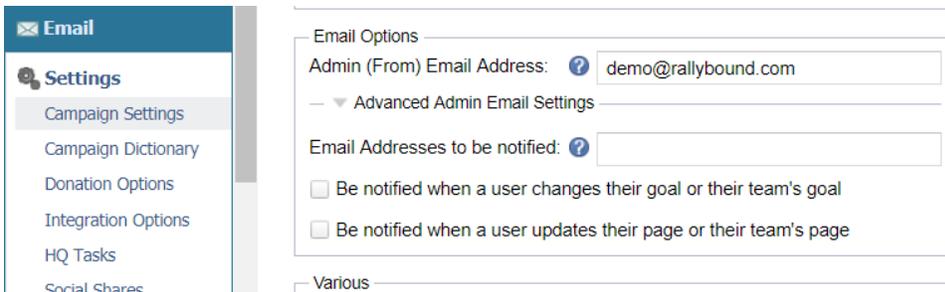
5. **Campaign Admin Panel > Settings > Integration Options.** You'll want to ensure all third party integrations are tied to the correct account. This includes Salesforce, MailChimp, Constant Contact, Google Analytics and NationBuilder.

6. **Social Networks.** If you have the site builder enabled, you can replace the social feeds that appear on your site by going to Settings > Campaign Dictionary > Widget - Facebook Feed URL/Instagram Feed ID/Twitter Feed URL. (Complete instructions here). If you do not have the site builder, submit a ticket to helpdesk@rallybound.com with your updated social ID's and we will update these across your platform.

7. **Site Content > FAQs**. All of the FAQ's natively use placeholders so once your organization name is updated (#1), these will be updated as well. However, we would recommend you review the FAQs to confirm.

8. **Front-end of the website.** Review the front-end for any trace of the org name or logo that you will be replacing. The logo can be edited by clicking on "Enable Editing" (instructions here). You will want to review each custom static page, along with the content entered through the Text Editor, your footer and any documents or guides that are provided as resources for fundraisers.

Merging two nonprofits into one entity is not a small feat. In most cases we would encourage you to use this opportunity to refresh your Rallybound template(s). This process will include a more "hands-on" deep dive into the front-end of your website and reduce the possibility of items being missed. If you would like a template refresh, please contact your Account Manager or helpdesk@rallybound.com for a quote.

We are happy to support you through this transition. Best of luck!