# Your Nonprofit is Merging Checklist

Throughout Rallybound's existence, we've had the privilege of partnering with nonprofits that end up combining with another 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:

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 organization name can be accessed in the Admin. Once you have logged in at admin.rallybound.com, 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.
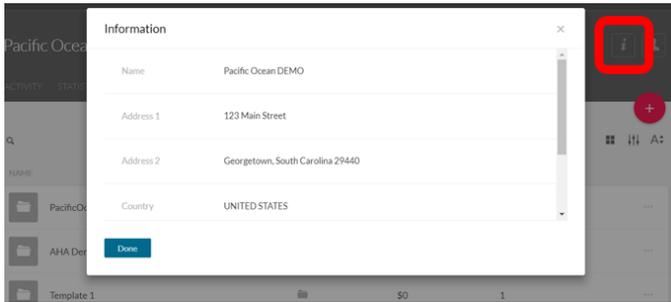
Payment Processor

For a self-service processor, you can configure NeonPay on your organization entity, under System > NeonPay. Alternatively, please contact support to configure your selected processor.

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 the text is all accurate and that placeholders are being used so that they pull the most updated information. 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. The header and footer are editable on a campaign entity in the Admin, under Email > Email Designer. Additionally, you'll want to confirm the email address that emails will be sent from under Email > Advanced.

Integrations

Ensure all third party integrations are tied to the correct account under System > Integrations (campaign entity only). This includes Salesforce, MailChimp, Constant Contact, Google Analytics, NationBuilder, Dropbox and NeonCRM.
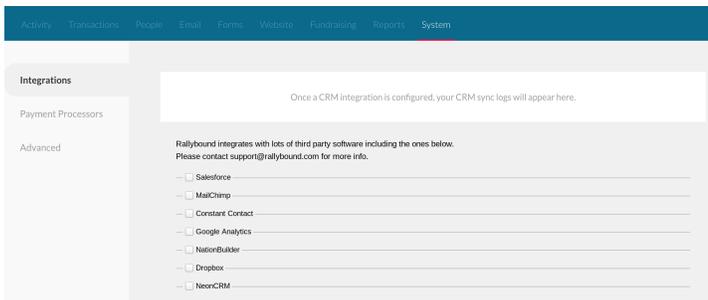
Social Networks

If you have Site Builder enabled, you can replace the social feeds that appear on your site under Website > Customize > Widget - Facebook Feed URL /Instagram Feed ID/Twitter Feed URL (complete instructions here).

FAQs

All of the FAQs natively use placeholders so once your organization name is updated (above), these will be updated as well. However, we recommend you review the FAQs to confirm, under Website > FAQs (campaign entity only).

Activity	Transactions	People	Email	Forms	**Website**	Fundraising	Reports	System

FAQs	Add FAQ Section	
	Section Title	**Order number**
Sponsors	☐ Donate FAQs	700
	☐ Fundraising FAQs	800
Blog	☐ Website FAQs	900

Website

Review the front-end for any trace of the old organization name or logo. The logo can be edited by clicking on "Enable Editing" (instructions here). You will want to review each custom 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 "hands-on" deeper 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 Client Success Manager or helpdesk@rallybound.com for a quote.

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