SNAPSHOT SETUP GUIDE · NONPROFITS

Nonprofit Starter
Setup Guide

Everything you need to turn the Nonprofit Starter into a live, branded donor, volunteer and help-request system for your organization.

15	6	14	2
website pages	workflows	email templates	AI agents

Setup time	Inside	Updated
3 to 4 hours	Quick Start + full guide	November 2026

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NONPROFIT STARTER · QUICK START

The short path to live

Eight steps, about 3 to 4 hours in all. Do them in order. The full guide has the details for each one.

15 MIN

1 Fix what the install leaves behind

Set Home as the home page, publish the 6 forms, and remove "(Import)" from the workflow names.

Guide: Step 0

15 MIN

2 Profile and brand

Workspace profile, logo, colors and fonts, and a workspace slug for review links.

Guide: Step 1

90 MIN

3 Replace the sample content

Swap Open Door Alliance for your organization on every page: name, programs, stories, staff, photos, EIN line. Fill in the Privacy Policy.

Guide: Step 2

15 MIN

4 Launch the site

Connect the domain, publish all 15 pages, and click every link on the live site.

Guide: Step 3

45 MIN

5 Emails and workflows

Replace the brackets in the 11 everyday emails, set the sender and agency address, give contacts an owner, then publish and turn on all 6 workflows and test each form.

Guide: Step 6

15 MIN + WAIT

6 Phone and texts

Get a number, register for A2P, and replace the brackets in the 6 SMS templates.

Guide: Step 7

10 MIN

7 Review requests

Add your Google profile, paste back the review defaults, and leave gating off.

Guide: Step 8

30 MIN

8 AI assistants

Add credits, replace the sample facts block, update both agents, then attach and Publish the chat widget.

Guide: Step 9

Start this today. Start A2P text registration on day one. Approval often takes several days, and texts stay blocked until it clears.

What you're setting up

The Nonprofit Starter gives an organization a working donor, volunteer and help-request system with a 15-page website. Every workflow arrives turned off, so nothing reaches a real person until you say so.

Area	What you get	Notes
Website	15 pages: Home, Give, Programs, Housing, Get Help, Volunteer, Events, Stories, Blog, About, Contact, Privacy Policy, plus 3 starter blog posts	Rename or delete Housing and the posts if they don't fit
Forms	Donation, Monthly Giving, Get Help Callback, Volunteer Interest, Event RSVP, In-Kind Donation	Already placed on their pages
Pipelines	Donors, Volunteers, Help Requests	Descriptions don't copy over; see Step 5
Tags	Donor, First Gift, Repeat Donor, Major Donor, Monthly Partner, Lapsed donor, Volunteer	
Email templates	14: gift thank-you, monthly partner welcome and letter, lapsed donor update, volunteer welcome and orientation nudge, RSVP confirmation, two event reminders, help request confirmation, staff alert, plus year-end appeal, Giving Tuesday and winter volunteer drive campaign emails	Branded email shell
Workflows	6: Gift Thank-You, Monthly Partner Welcome, Lapsed Donor Update, Volunteer Onboarding, Help Request Routing, Event Reminders	Installed turned off on purpose
SMS templates	6, each with a STOP line	Campaigns > Templates > Snippets
Review requests	SMS and email defaults written for nonprofits	Defaults don't copy over; see Step 8
AI agents	Website Assistant (chat) and Phone Receptionist (voice), each with a facts sheet to fill in	Off until you add AI credits
Brand	Deep teal, warm gold and cream palette; Lora and DM Sans	Change in Settings > Branding

Before you start

Plan on 3 to 4 hours for setup, plus a few days for phone number registration (A2P) to clear. Gather these first:

- Logo (PNG, transparent background) and two or three brand colors
- Legal name, EIN, street address, main phone, public email and office hours

- Mission statement in one sentence, plus your founding year
- Programs: name, who qualifies and what happens, for each one
- What $25, $50, $100 and $250 provide
- Volunteer roles and the minimum age
- Items you always need and items you can't accept
- Two or three short stories, used only with written permission
- Your Google Business Profile review link
- Staff names and titles for the About page

> **Who does what.** The agency installs the snapshot and connects the domain, phone number and payments. The organization supplies the content above and approves the copy.

Step 0. Right after install

Work in order from here. Each step builds on the one before, and the workflows stay off until Step 6 so nothing sends with sample content in it. The installer changes four things; fix them before anything else:

1. **Set the home page.** The install marks Volunteer as the home page. In Sites > Nonprofit Website > Pages, set Home as the home page.
2. **Publish the 6 forms.** Forms arrive as drafts, so every page shows "This form is not published" where the form should be. Open Forms and publish each one.
3. **Rename the workflows.** Each name gets "(Import)" added to it. Remove that from all 6.
4. **Turn on the site and publish pages.** The site and all 15 pages arrive unpublished. Publish them in Step 2, after you replace the sample content.

Step 1. Profile and brand

1. Settings > Workspace Profile: legal name, address, phone, email, time zone.
2. Settings > Branding: upload the logo and set your colors and fonts. The website, emails and chat widget use the brand colors.
3. Settings > Workspace Profile: set a workspace slug. Reputation needs it to build your main review link.

Step 2. Replace the sample website content

1. Sites > Open Door Alliance. The website comes filled in as **Open Door Alliance**, a fictional sample organization in Tacoma, WA, so the demo looks finished. On every page, replace its name, address, phone numbers, staff, programs, impact numbers, events, the stories marked "(SAMPLE STORY)" and the photos with your own, including the header, the footer and the EIN line. Rename the website in General, too.
2. Programs, Events and Stories have card grids. Delete cards you don't need rather than leaving sample content.
3. Housing is an optional second-service page. Rename it (page menu > Page Settings) or delete it and remove it from the header nav on every page.

4. Blog posts: keep, rewrite or delete the three starters. If you rename a post's address, update its link on the Blog page.
5. Publish each page after editing.

Privacy Policy. The Privacy Policy page (/privacy) is linked in every footer. Fill in its brackets, name your giving platform, and have it reviewed by a qualified professional before launch. It already includes the text-message terms carriers look for.

Step 3. Domain and launch the site

1. Sites > Nonprofit Website > Domain: connect the organization's domain.
2. Visit every page on the live domain in a private window, then click every header and footer link.

Step 4. Forms

1. Forms: open each of the 6 forms and check the dropdown choices fit your work, like gift amounts, funds, events and volunteer roles.
2. Edit the success messages if your callback times differ.
3. Save and keep them published. Each answer saves to its own contact field.

Step 5. Pipelines

Pipeline descriptions don't copy over in a snapshot. Paste these back into each pipeline's settings:

Donors: Every giver, from first gift to monthly partner to major donor. Cards move automatically from the donation and monthly giving forms.

Volunteers: People who raised a hand to serve, from first interest through orientation to active and on-call volunteers.

Help Requests: Neighbors who asked for help through the Get Help form. Call back the same day and keep notes brief. Never record health details here.

Step 6. Emails, then turn on workflows

1. Email > Templates: unlike the website, the 11 everyday emails keep "[Your Organization]" and other square-bracket placeholders on purpose, so they fit any organization. Replace the brackets, set the sender, and send yourself a test of each.
2. The 3 campaign emails (year-end appeal, Giving Tuesday, winter volunteer drive) are written as Open Door Alliance samples. Rewrite them for your organization and send them from Email > Campaigns when the season comes.
3. Make sure each contact gets an owner (Settings > Users, then assign). Internal alerts arrive as tasks for the contact owner, because notify and internal email steps don't copy in snapshots. If you also want an email or text alert, add a Notify step to Volunteer Onboarding and Help Request Routing after install.
4. Event Reminders: set the two wait steps for each event so the reminders land one week out and the day before.
5. Open each workflow and click Publish and turn on. Then submit each form once on the live site and confirm the card, the email and the task appear. Use a real email in the Get Help test: email is optional on that form, so a phone-only request still gets its card and task, but the confirmation email step shows as failed in the run history. That's expected.

> **Edit email text with care.** Each email's branded header bar and button color are written into its HTML. The visual email editor can drop those colors when it saves, which leaves the header text white on white. After you edit an email, open Preview and check the header bar (#2F5D62) and button (#E0A458) still show.

Gift amount on the receipt. The Gift Thank-You shows "Gift amount: {{contact.gift_amount}}", filled from the Donation form's Gift amount choice. If a donor picks "Other", the receipt will say "Other". If the organization takes gifts through a separate giving platform, have that platform (or a Zapier step) write the real amount to the Gift Amount field before the thank-you sends, or edit that line to fit.

Address and sender name. The platform adds a footer to every email: a mailing address and an unsubscribe link. The address comes from this workspace's profile (Settings > Workspace Profile > Address & region). If that's empty, emails fall back to the agency's address, so fill in the organization's street, city, state and ZIP. US law requires a valid mailing address on every marketing email; a PO box is fine. Also set the from-name to the organization's name, or emails show the agency's name.

> **What to expect when you test.** Workflows start about 90 seconds after a form is submitted, so wait two minutes before checking. Emails from a new sending domain often land in Gmail's Promotions tab at first.

Step 7. Phone and SMS

1. Fund the wallet, then Phone > Numbers & routing > Get a Number.
2. Complete A2P registration (Phone > Register). Texts stay blocked until it clears, which often takes several days.
3. Replace the brackets in the 6 SMS templates (Campaigns > Templates > Snippets). Keep the opening organization name and the STOP line on every text.

Text opt-in and A2P registration. The Get Help, Volunteer and In-Kind forms each have an optional, unchecked text consent box that saves to the SMS Consent field. Before you send any text:

- Replace the sample organization name in each box with the name you register under.
- Register your A2P 10DLC brand and campaign. In "How do contacts opt in," quote the box's wording word for word and link the Privacy Policy page.
- Only text contacts whose SMS Consent field is checked.

Step 8. Review requests

1. Reputation > Setup > Platforms: add your Google Business Profile and set it as primary.
2. Reputation > Setup > Templates: the SMS and email defaults don't copy over. Paste these back and save each default (below).
3. Leave review gating off. Gating screens out unhappy people before they reach Google, which Google's review policy prohibits. Accounts caught gating can lose their reviews. Read and answer private feedback in Reputation instead.

SMS: Hi {{contact.first_name}}, thank you for being part of our work at {{business.name}}. Would you share a quick review? It helps neighbors find us: {{review_link}} Reply STOP to opt out.

Email subject: A quick favor for {{business.name}}? **Body:** thank them for giving, volunteering or coming to you for help, ask for a review on {{platform_name}}, include {{review_link}}, and sign with a real name.

Step 9. AI website assistant and phone receptionist

1. AI Supercenter > Settings: add usage credits. The agents can't reply without them.
2. Website Assistant > Knowledge: it ships trained on the "Open Door Alliance facts (sample organization)" block. Add a content block with your own facts (programs, hours, phone lines, how to give and volunteer, events), then delete the sample block. Blocks can't be edited, only added and deleted. The Phone Receptionist's facts sheet still uses brackets: replace them. The agents only know what's written there.
3. Read both agents' instructions. Change the Website Assistant's Open Door details (name, pantry hours, phone lines) to yours, and replace the brackets in the Phone Receptionist's. Keep the crisis lines: 911, call or text 988, and 211.
4. Website Assistant: in Chat widget > Identity, change the name, company, first message and welcome title from Open Door Alliance to your organization, and set the colors under Appearance (these may not copy over; check them). Add suggested replies if you like: I need help, I want to give, I want to volunteer. Turn the agent on (Agents tab, power icon), attach it at Sites > your website > General > Chat Widget > Save Settings, then click Publish widget in Test & deploy. The chat only shows on your site after that last step.
5. Phone Receptionist: in Voice & speech, turn on Voice enabled and "Wait quietly when callers say hold on". These don't copy over. Then assign your number in Call handling and turn it on. Call it yourself and test help, giving and volunteering questions.
6. Both agents say they're virtual assistants when asked. Leave that in.

Launch checklist

- [ ] No sample names or [brackets] left anywhere: search each page, email, SMS template and AI facts sheet
- [ ] Logo, colors and organization name show on the site, emails and chat widget
- [ ] Every page is published and every link works on the live domain
- [ ] One test submission of each form creates the right card, email and task
- [ ] All 6 workflows published and turned on
- [ ] Phone number active and A2P approved before any text goes out
- [ ] Google review link added and set as primary; review gating off
- [ ] AI credits added; both agents tested and turned on

- [ ] Every contact has an owner, so alert tasks land with a real person
- [ ] Test contacts deleted

Known quirks

- **Things a snapshot doesn't copy:** pipeline descriptions, review-request defaults, site head code, and Notify or internal email workflow steps. Steps 5, 6 and 8 cover each one.
- **Form preview looks dark:** in the app's dark mode, the form preview shows dark input fields. The live site shows them light.
- **Page renames:** change a page's title or address from the page list (page menu > Page Settings). Reload the list before renaming a second page, or the dialog can save onto the wrong page.
- **Phone agent model:** keep the receptionist's model on Auto or an OpenAI model. Other models can't stream on phone calls and sound choppy.

Questions or stuck on a step?
Email hello@leadbuildlive.com and include your workspace name.

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