



Onboarding Guide for Organisations and
Charities

Getting Started on BackaBuddy

Your step-by-step administrative checklist
and operational liftoff plan, designed for
non-profit finance managers,
administrators, and school bursars who are
ready to launch a BackaBuddy campaign
with confidence.

Compliance Vetting Checklist

Before you go live

Verify each item below before launching your BackaBuddy campaign. This protects your organisation and builds donor trust from day one.

Checklist

- ☐ NPO or PBO registration number confirmed
- ☐ Section 18A tax certificate status verified
- ☐ Organisation banking details match the registered name
- ☐ The authorised signatory has approved the campaign content
- ☐ Campaign story reviewed for accuracy and dignity
- ☐ Beneficiary consent obtained and documented
- ☐ BackaBuddy profile approved by internal stakeholder

Internal sign-off note:

Our campaign has been reviewed, and all compliance requirements have been met. We are ready to launch on BackaBuddy with full organisational approval.

Signed off by: _____ Date: _____

Verified and ready? Now your donors can give with confidence.

Hour 1 Self-Audit

Today's action

Your campaign is live!

Let's do a quick self-audit to make sure everything looks perfect before you start sharing.

Checklist

- ☐ My campaign page is live and publicly visible
- ☐ The campaign title, story, and goal amount are correct
- ☐ My profile photo and beneficiary details are accurate



Quick Audit Check right now:

Open your campaign link on your phone and ask:

Does this tell a clear, compelling story?

Is the goal amount right?

Does the donate button work?

Would I donate to this?

If anything feels off, fix it now, before your first share goes out.

A strong start builds lasting donor confidence.

Mobilise Internal Core

Your action now

Your campaign is live. Now rally your closest supporters and get your internal team moving. Momentum built in the first 12 hours sets the tone for everything that follows.

Checklist

- ☐ I shared the campaign link with my core internal team
- ☐ I assigned a point person to monitor and respond to donors
- ☐ I sent a personal message to at least 5 warm contacts

Use this template to message your inner circle

Hi [Name],

Our BackaBuddy campaign just went live, and you are one of the first people I am sharing it with.

Your early support means the world. Even a share helps us build momentum.

Here is the link: [Campaign Link]. Thank you for being in our corner.

Early momentum starts with the people closest to you.

Deploy Your Champion Network

Your action now

At the 24-hour mark, your campaign is live and verified.

Now it's time to activate your champions, the people who will share your cause with their own networks and multiply your reach organically.

Champion deployment checklist

- ☐ Identify 3–5 trusted Champions to share on your behalf
- ☐ Send each Champion a personalised WhatsApp with your campaign link
- ☐ Provide a ready-to-use caption or copy-paste message

Use this template to message your champions:

Hi [Name],

Our campaign is now live on BackaBuddy! Would you be willing to share it with your network?

Here's a message you can copy: "I'm supporting [Cause/Name] — please donate or share if you can. Every rand helps.

[Campaign Link]"

*Your Champions are your
greatest asset.*