How to replicate a campaign

Administrators can replicate a campaign site with all settings and content (including web pages) intact. This makes it easy to run multiple instances of the same event (for example, in different locations).

Before replicating, ensure that all settings and content are customized to your liking. Once a campaign is replicated, the new campaign has its own settings and content so it's best to do all the customization once — prior to replication. Once that's done, replicate your campaign by following these steps:

1. Log in to the Admin at admin.rallybound.com
2. Navigate to the campaign you'd like to replicate and double-click to go to the campaign details page
3. At the bottom left of the campaign window, click "Replicate"
4. Fill in your new campaign's information
5. Select which settings you'd like to replicate (see below)
6. Click "Replicate"
7. Once the new campaign is created, be sure to edit the elements that may have held over from the last campaign, for example:
   - Campaign image
   - Any unique site content
   - Auto responders
   - Site defaults
   - Sponsors
8. When a campaign is created, it is automatically delisted. This is so that administrators can do edits and testing to make sure the site is ready to launch. When it is, be sure to publish the campaign by clicking the blue "Publish" button in the left sidebar to display it on the platform landing page.

When replicating, administrators can choose what to replicate from the existing campaign to the replicated campaign. Below is the full list of settings with descriptions of what they include:

- Items that are **always replicated regardless of checkboxes**:
  - Registration Settings
  - Roles and role fields, tickets and ticket fields
  - Site Builder updates (color, navigation, buttons, widgets)
  - All custom content in editable areas
  - All custom content in dictionary terms
  - Social Share customizations
- Items that are not replicated regardless of checkboxes:
  - Campaign information (name, URL, description, goal, date, location)
  - The value of custom campaign fields (these fields appear in the campaign details window, under the campaign location field)
- Admin Users
  - All administrators who have access directly to the existing campaign will have access to the replicated campaign as well, with the same security role.
- Campaign Settings
  - Registration Type (Detailed, Quick, or Role Registration)
  - Registration fields, custom forms and fields
  - Admin Panel > Campaign Settings:
    - Donation Options
    - Email Options
    - Various
  - Custom settings configured by Rallybound support
  - Integrations configured in the Integration Options tab of the Admin Panel?
  - Any customizations made in the HQ Tasks tab of the Admin Panel?
- Payment Processor
  - The replicated campaign will be configured to process payments through the same processor and account as the existing campaign.
  - PayPal configuration
- Email Templates
  - Admin Email Templates
  - Fundraiser Email Templates
  - All changes to autoresponders' subject and body will be replicated
  - Any custom autoresponders will be replicated
- Defaults
  - Personal and team fundraising page title and message defaults will be replicated
  - The "Defaults" section of the Campaign Settings tab in the Admin Panel
  - For legacy campaigns, media uploaded to the fundraising page defaults page
- Site Content
  - Sponsor levels
  - Sponsors (only those that were added to the campaign after September 18, 2019)
  - All FAQs
  - Image Library