How to move registrant or donation records across campaigns

There are various ways to move donation and registrant records across campaigns, depending on your instance configuration.

Move a Registrant

To move a registrant across campaigns, the registrant must be deleted from the first campaign and added to the next. To do so, follow these steps:

1. Log in to the Admin at admin.rallybound.com
2. Navigate to the campaign from which to delete the registrant
3. Click the "People" tab
4. Click "Registrants" in the left sidebar
5. To delete a registrant, follow the steps here: How to delete a participant
6. Next, navigate to the campaign on which to register the registrant
7. Click the "People" tab
8. Click "Registrants" in the left sidebar
9. To add a registrant, follow the steps here: How to add or edit registrants (instructions for administrators)

Move a Team

To move a team across campaigns, the team must be deleted from the first campaign and added to the next. To do so, follow these steps:

1. Log in to the Admin at admin.rallybound.com
2. Navigate to the campaign from which to delete the team
3. Click the "People" tab
4. Click "Team" in the left sidebar
5. To delete a team, follow the steps here: How to delete a team
6. Next, navigate to the campaign on which to create the team
7. Click the "People" tab
8. Click "Team" in the left sidebar
9. To add a team, follow the steps here: How to add or edit a team (instructions for administrators)

Move a Donation

Depending on your organization's processor configuration, you may be able to move a donation record directly, without needing to delete it. Please see How to move donations across campaigns for more information. For any campaigns not configured in such a way, the donation must be deleted from the first campaign and added to the next. To do so, follow these steps:

1. Log in to the Admin at admin.rallybound.com
2. Navigate to the campaign from which to delete the donation
3. Click the "Transactions" tab
4. Click "Donations" in the left sidebar
5. To delete a donation, follow the steps here: How to refund and/or delete a donation
6. Next, navigate to the campaign on which to create the donation
7. Click the "Transactions" tab
8. Click "Donations" in the left sidebar
9. To add a donation, follow the steps here: How to add or edit a donation (instructions for administrators)