

Copy an Existing Event Site (Campaign)

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This guide details how to copy existing Event Sites (Campaigns) with the option to carry over global settings, items, users, and tickets.

The ability to copy Event Sites/Campaigns is available for Org Admins (GiveSmart Events only) or Global Admin (GiveSmart Events + Fundraise) once the deposit or the annual subscription is paid.

Watch a video

GiveSmart Events - Copy Campaign

Navigate to the Org Hub > Campaigns.

Click *Copy Campaign* to create a new campaign.

Option to copy any combination of Users, Items, and Ticket details.

Planning on Selling Tickets? Please Read:

- If you are planning on selling tickets for your new event, to ensure a smooth user registration experience, it's best **not** to copy users from a previous event site where tickets were also sold.
- Instead, encourage users to register for your new event directly on the homepage of your new site, either by selecting the "Register" option or by purchasing an event ticket.
- This practice allows users to provide their most up-to-date information, including payment details, during registration.
- By opting **not** to copy users from the previous site, you can prevent potential issues with logins or ticket assignments caused by duplicate user accounts.

- **Users**

- Do **not** opt to copy users if you've sold tickets in the copied event.
- All User's names, mobile numbers, emails, and mailing addresses copy.
- Credit cards that have not expired copy. The expiration month and year are recognized.
- Copied users maintain their text Opt-In and Terms and Conditions preferences.

- **Items**

- All items and packages, with details, copy.
- Item donor names, mobile, email, or mailing address don't copy. Display on

Item field copies.

- Item Images, from prior GiveSmart CB campaigns, copy.
 - Legacy copied campaigns vary.

- **Tickets**

- Ticket Types copy.
 - Copied tickets are hidden by default.
 - All purchasing activity is removed.
- Ticket questions copy.

Complete the rest of the Form. Select **Save**.

GiveSmart by Community Brands

CAMPAIGNS INVENTORY TOP DONORS ADMINS USERS ANNE ▼

197 CAMPAIGNS \$3,735,379,410 LIFETIME RAISED

TERMS AND CONDITIONS: EDIT Merchant Account Status: ACTIVE

Create a New Campaign + New Campaign

DATE	NAME	STATUS	KEYWORD	RAISED
08-13-2020	Nathaniel Hodges Demo Deposit Paid	NHodges		\$30,180

View Campaign Copy Campaign

Copy an existing campaign

NOTE: Once a campaign is created in your org hub, it cannot be deleted.

GiveSmart Events + Fundraise - Copy Site

Navigate to the Org Hub > Event Sites. Click *Copy Site* to create a new site.

Event Sites

38 SITES \$2,379,664 LIFETIME RAISED

TERMS AND CONDITIONS: EDIT MERCHANT ACCOUNT STATUS: ACTIVE

Create a New Event + New Event Site

DATE	NAME	STATUS	KEYWORD	RAISED
06-04-2023	Cardinal	Active		\$2,578
06-01-2023	Test Redirect Service	Active		\$250
05-31-2023	GiveSmart_Events	Active		\$0

View Site Copy Site

Copy an existing event

Select which content to copy, you have the option to choose between Users, Items & Tickets. Once selected, click **Save & Continue**.

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Select from an existing Fundraise campaign or create a new campaign to link this event.

You need to link your copied GS Events site to a GS Fundraise campaign

Congratulations! You have almost completed copying the GS Events **cardinal**.

Each activity is tied to a specific campaign.

Now connect this copied activity to an existing campaign in GS Fundraise. Please select:

Select a campaign



+ New Campaign

Cancel

Back to GS Events

Once selected, click **Back to GS Events**.

Complete the required fields and select **Continue to GiveSmart Events**.

Review the suggested field settings, and click **Save & Continue** to begin customizing your new event site.

You've successfully connected your cardinal campaign. Let's start setting up your activity!

Activity Settings

The following settings are selected by default; change them if you wish.
(You can also change them later in Global Settings or Donation Settings.)

- ☒ Card on File
- ☒ Allow Self Checkout
- ☒ Transaction Fees: Optional for Purchaser
- ☒ Recurring Donations

Save and Continue

NOTE: If the above activity settings are unselected (unchecked), the new campaign will disable the above, and the **transaction fees will default to Paid by Organization.**

Please review all Global settings before going live.

List of Copied Fields and Settings

These fields and settings are automatically copied:

- **Global Settings**
 - Logo
 - Website URL
 - Display Name
 - Name for Text Messages
 - Bidder Numbers, Bidder Names, and Purchaser Names
 - Request for Bidding and Registration
 - Messages
 - **NOTE:** Payment fields do not copy over to the new campaign.
- **Design Center**
 - Main and Secondary Color
 - Banner Text Colors
 - Order Form Button Text
 - Donation Revenue Goal
 - Custom Sections
 - Contact Us
- **Donation Settings**
- **Auction Settings**
- **Communication Settings**
- **Custom Displays**

