Cloning Checklist

Review when creating from a template for Forms, Events, and Donations

☐ Edit the title

☐ Edit the Start Date and End Dates

☐ Edit the Display Dates and Registration Dates (if applicable)

☐ Edit the Preview Text (for a listing) and the Description (Detail Page) (if needed/desired)

☐ Review and edit the Review and Finish pages (if needed/desired)

☐ Review and edit the Member and Admin Confirmation Emails

☐ Edit step names (if needed/desired)

☐ Edit category names (if needed/desired)

☐ Edit the values of any fields or commerce items (if needed/desired)

☐ Change field names and export column header names (if needed/desired)

☐ Rebuild and reapply form specific roles (general profile driven roles are fine)

☐ Add any unique fields needed

☐ Verify the payment gateway being used for the event. If the event you cloned was assigned to use a specific gateway, this event will also be set up to use the same gateway.