

You can use the **Quick People Search** or full **People Search** to find, view, and edit a People record. To learn more about the quick searches or new search features in Crimson, see the [Crimson – Quick Searches](#) guide or [Crimson – New Search Features](#) guide on our HelpDesk.

The **People Profile** in Crimson segments data into separate panels and includes summary information in each. When a panel is selected, the lower half of the profile displays that panel’s summary details and analytics as well as the list of the records that are being summarized.

Below shows how to edit a people record and the features in the **Giving History** panel. To learn more about all of the panels in a People Profile in detail, see the [Crimson – People Profile Panels Details](#) guide on our HelpDesk.

Mr. Joseph M. Banks, Sr.
ID #74178535-9

1593 Spring Hill Rd
Suite 400
Vienna, VA
22182

cvvale@gmail.com
123.456.7890
717.888.9172
724.393.1999

TimeLine

- Aug 16, 2022: To Do - TEST Assign a task to Rach...
- Aug 06, 2021
- Feb 10, 2021: SEP BAILEY TESTING - NO INITI...
- Jan 18, 2021
- Jan 02, 2021: \$500.00 - MISC1(C-PAC)
- Dec 31, 2020: Call - follow
- Dec 25, 2020: Call - follow up
- Dec 16, 2020: Volunteer - Booth

Individual

Occupation: CEO
Employer: Joseph Banks
Spouse: Ellen Banks
Informal: Joe
Chapter: Mid-Atlantic - DC, MD, VA

Tasks: 15 Outstanding

Codes

Flags: BIO, YARD2, LCCE, HOST, 5+
Keywords: Recent Donor, tst1104, b v b v
Attributes: bc.xnfbn, 16+
Event

Giving History

Cycle-to-Date: **\$14,698** (79 gifts)
Most Recent: **\$500** (01/02/2021)

Notes

- Dec 14, 2020: Send Thank You
- Dec 14, 2020: Follow Up on Conversation
- Dec 14, 2020: Follow Up on Conversation

Actions

- Feb 10, 2021: SEP BAILEY TESTING - NO INITI...
- Dec 16, 2020: Volunteer - Booth
- Nov 16, 2020: Voter Outreach - Phone Calls

Giving History

All-Time Total: \$995,148 (1,642 gifts)
Soft Credits: \$5,030 (2 gifts)
Total Raised (YTD): \$14,698.41 (79 gifts)

Pledges: \$0 YTD

Consecutive Gifts: 6 cycles (Donor since cycle 2008)

Giving Overview

\$995,148.01 Total Raised (CTD) | 1642 Gifts

RVC1	\$0	(\$200,000 Remaining)
RV	\$0	(Maxed)
P2022	\$5329.1	(Maxed)

\$8785.01 Spouse: Ms. Ellen Banks Total Raised (CTD) | 18 Gifts

P2020	\$50	(\$2750 Remaining)
P2018	\$1150	(\$1550 Remaining)
G2020	\$1200	(Maxed)

Recent Gifts

- MID 461646 • #1255 • 1/2/21 • \$500 • CH C-PAC • Housefile • MISC1 • N/A
- MID 538178 • #1004 • 7/14/20 • \$1,000 • CH G2020 • Housefile • 0001 • N/A
- MID 535509 • #1240 • 5/26/20 • \$303.43 • WR P2020 • Event1 • CS • N/A
- MID 535510 • #1240 • 5/26/20 • \$185.07 • WR P2020 • Event1 • CS • N/A
- MID 535517 • #1240 • 5/26/20 • \$6 • WR P2020 • Event1 • CS • N/A
- MID 535518 • #1240 • 5/26/20 • \$7 • WR P2020 • Event1 • CS • N/A
- MID 535525 • #1240 • 5/26/20 • \$14 • WR

Edit a Record’s Profile Fields

- Click the **Individual** or **Organization** panel to open the **Edit Record** screen. The information shown in these panels depends on the **People Type** selected for the record.

Individual	Organization
Occupation CEO	Type of Organization Multi-Candidate PAC
Employer Joseph Banks	Industry Category
Spouse Ellen Banks	Created On 03/29/2022
Informal Joe	FEC ID C00000059
Chapter Mid-Atlantic - DC, MD, VA	Cash on Hand \$174,368 (08/31/2022)

People

Mr. Joseph Banks, Sr. (PID: 76002209)

Profile	Contact
Type Individual	Home Phone (703) 123-4567
Code Donor	Cell Phone (###) ###-####
Assign Fundraiser 100010 - Lydia M. Siu 12457 - Joseph Bailey Select Gift Officer(s)	Work Phone (703) 790-8676
Tracking# 3876	Fax 703.234.5678
<input checked="" type="checkbox"/> Lobbylist <input type="checkbox"/> Link User Account	Email Address jbae@cmdi.com
Occupation President	Website
Employer Abc Corporation	Facebook
Formal Salutation Mr. Banks	Address Type Business
Informal Salutation Joseph	Find an Address Enter a location
Maid Salutation	Street 7704 Leesburg Pike
Prefix Mr.	Additional Address Line
First Name Joseph	Additional Address Line
Middle Name	City Falls Church
	State / Zip / Plus4 VA 22043 2631

- The majority of the fields will open in a fully editable format as displayed above. When you have made all appropriate changes, click the **Save** button at the bottom right. Click the **Cancel** button to undo any changes made without saving. You can exit the **Edit Record** screen by clicking the red **X** at the top right.

Giving History

- In the **Giving History** panel, you will see the **Cycle-to-Date** total with the number of gifts that equal that amount and the **Most Recent** contribution amount and date.
- Click the button to add a new gift under the people profile. Once you have added the contribution information in the new money screen, press the **Save** button.
- When you click within the **Giving History** panel, the lower left side of the panel summary will display summary contribution data and analytics such as totals by fund, year, program, and the total a linked spouse has given to active fund codes while the right side of the panel summary will display a list of **Recent Gifts**.

Giving History

All-Time Total
\$995,148
1,642 gifts

Soft Credits
\$5,030
2 gifts

Pledges
\$0
YTD

Consecutive Gifts
6 cycles
Donor since cycle 2008

Recent Gifts [All](#) | [Statement](#) | [Mail History](#) | [Add Gift](#)

- MID 461646 • #1255 • 1/2/21 • \$500 • CH
C-PAC • Housefile • MISC1 • N/A
- MID 538178 • #1004 • 7/14/20 • \$1,000 • CH
G2020 • Housefile • 0001 • N/A
- MID 535509 • #1240 • 5/26/20 • \$303.43 • WR
P2020 • Event1 • CS • N/A
- MID 535510 • #1240 • 5/26/20 • \$185.07 • WR
P2020 • Event1 • CS • N/A
- MID 535517 • #1240 • 5/26/20 • \$6 • WR
P2020 • Event1 • CS • N/A
- MID 535518 • #1240 • 5/26/20 • \$7 • WR
P2020 • Event1 • CS • N/A
- MID 535525 • #1240 • 5/26/20 • \$14 • WR

\$14,698.41
Total Raised (YTD) | 79 gifts

\$995148.01
Total Raised (CTD) | 1642 Gifts

RVC1	\$0	(\$200000 Remaining)
RV	\$0	(Maxed)
P2022	\$5329.1	(Maxed)

\$8785.01 Spouse: Ms. Ellen Banks
Total Raised (CTD) | 18 Gifts

P2020	\$50	(\$2750 Remaining)
P2018	\$1150	(\$1550 Remaining)
G2020	\$1200	(Maxed)

- When you click a total amount in the left side of the panel summary, it will display a list of the contributions that make up that amount. For example, if you click the \$3,000 amount for G2018, it will display a list of all the individual contributions this donor gave to G2018 that equals the total amount of \$3,000.
- When you click a recent gift on the right side of the panel summary, it will open that contribution record so you can view and/or edit money details.
- Click **All** to see all live gifts or **Statement** to see gifts that may no longer be live along with the adjustments that have been applied such as refunds or chargebacks.

Gifts | Statement

Mr. Joseph Banks, Sr. —

Fund	Total	Remaining
G2022	\$230	\$2,670
TOTAL	\$230	

[Spouse: Sr](#)

Fund

Adjustment Type

Batch Date

Adjustment Date

Trans#	Batch Date	Donor	Code	Adjustment	Adj. Date	Amount	Adj. Amount	Net Amount
108	8/15/22	Mr. Joseph Banks, Sr.	G2022 - FC01 . N/A					\$50
105	7/26/22	Mr. Joseph Banks, Sr.	G2022 - WMKR1111111111 . N/A					\$50
106	7/28/19	Mr. Joseph Banks, Sr.	G2022 - Elisetest . N/A					\$30

- When viewing all gifts in a people record, you will see a table that summarizes the totals that donor has given to active fund codes and how much they can still give before they are maxed out in the **Remaining** column.
- You can filter by **Fund** code, **Source** code, **Program** code, and/or **Date** in the **Gifts** view to specify which gifts you would like to view.

- You can filter by **Fund code**, **Adjustment Type**, **Batch Date**, and **Adjustment Date** in the **Statement** view to specify which gifts you would like to view.
- Click the  button to view/edit a gift, click the  button to delete a gift, or click the  button to download a receipt. To export gifts to an Excel file, press the  button.