# crimson

Our team has been developing a refresh of Crimson's display to enhance features you already know and love. Below is a review some of the changes and new features that are coming with it. If you have any questions, we would also be happy to schedule, general, feature specific, or best practices trainings for you or your team. Just reach out our team at crimsonsupport@cmdi.com to schedule.

- **Login Screen**
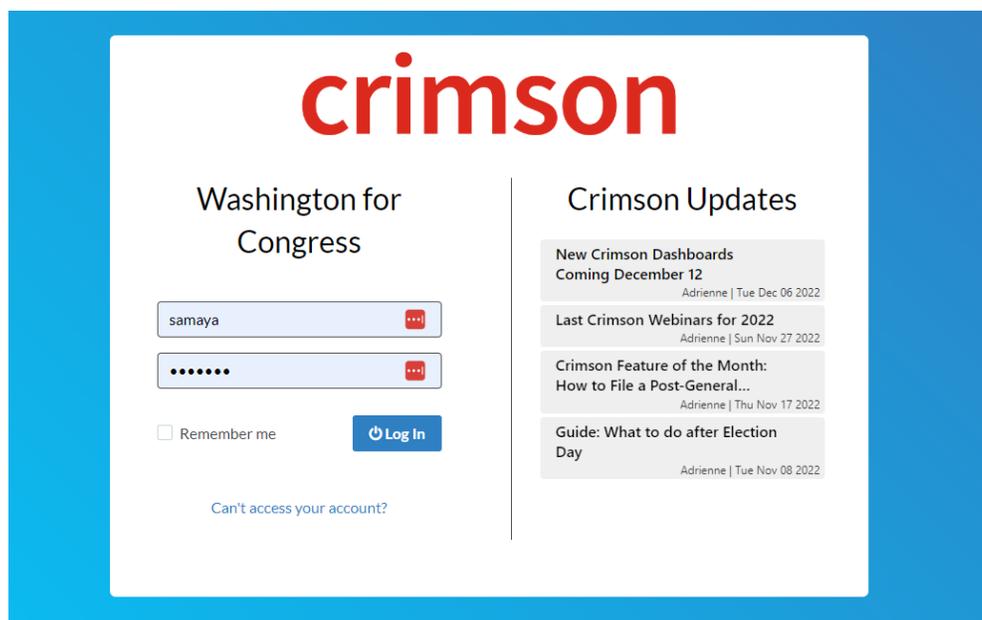
- o Users can still use their username, password, and 2 factor authentication to login.
- o The login screen now conveniently shares recent updates from our team. This will notify users of any features and recent guides we have released to help with Crimson and general compliance. For example, here users will find our latest webinar invites and FEC report reminders.

- **Improved Responsive Design** – The main layout of Crimson has not changed. Users can still find our main menu on the left-hand side, quick search bar at the top, and familiar dashboards with graphs, navigation bar, and interactive summary cards. However, many of these features have been improved for sizing and responsiveness to provide you with the best user experience no matter what size screen you are on.

- **Color Scheme** – A noticeable change was made to Crimson's color scheme. We have updated the colors and background to be more user friendly for users logged in for longer periods.

- **Dark Mode** – Additionally, Crimson now has a dark mode for all those late-night working hours – or for those who prefer a darker tone.
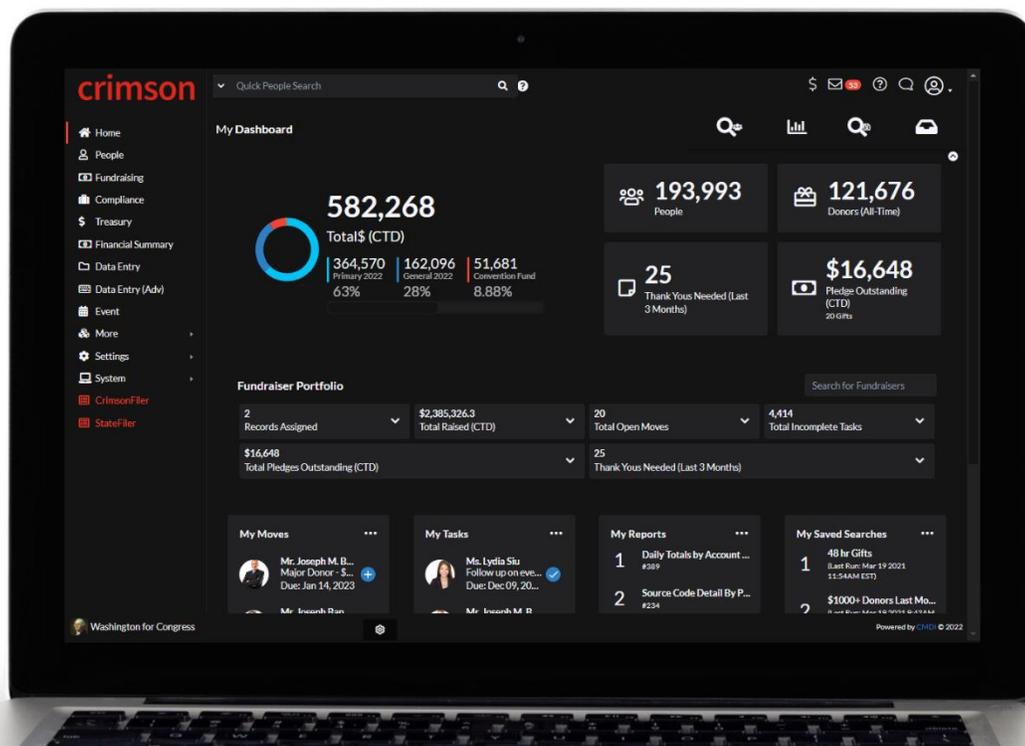
Let's look at some of the new features we have added.

- **Fundraiser Portfolio**

Fundraiser Portfolio			Search for Fundraisers
2 Records Assigned	$2,385,326.3 Total Raised (CTD)	20 Total Open Moves	4,414 Total Incomplete Tasks
$16,648 Total Pledges Outstanding (CTD)	25 Thank Yous Needed (Last 3 Months)		

   - o On **My Dashboard**, we now have a **Fundraiser Portfolio**.
   - o Fundraisers can now be assigned at the people level in addition to the gift level.
   - o This set of portfolio cards will allow users to quickly see key fundraising numbers from your campaign's fundraisers.
   - o Click on any of the dropdown menus to see additional stats and click directly on those stats to be provided with a list of results.
   - o Users with the highest levels of access will be able to view all fundraiser data and can also drill down into the fundraising efforts of one person by searching by name or ID in *Search for Fundraisers*.
   - o Fundraisers logged in with limited access will only be able to view data from their own funds raised.

- **My Moves and My Tasks**

   - o On **My Dashboard**, users can now access and manage both **My Moves** and **My Tasks**.
   - o Tasks allow users to manage calls, meetings, and other to do items assigned to them.
   - o Moves track the relationship building, or donor life cycle, process for large dollar, recurring, prospect, and many other types of donors.
   - o My Moves will list active Moves that have been assigned to users as the relationship manager for those people records.
   - o Click on any item in the lists to open them.
   - o For My Moves, click on the blue plus icon to add an affiliated task, gift, process credit card contribution, or note.
   - o For My Tasks, click on the blue checkmark to mark a task as completed without having to leave the page.

- **My Saved Searches and My Reports**
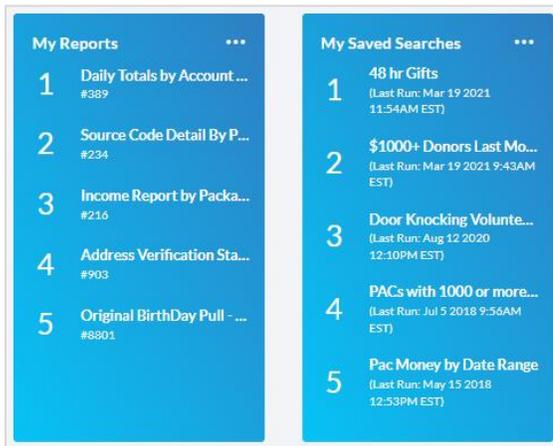
  - While users can still access My Saved Searches from the Navigation Bar, you can now also run a saved search from the dashboard, just like with the Reports they have saved.

- **Fundraising Dashboard Total Gifts by Period of Time Card**
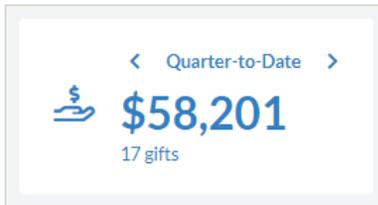
  - We added a new card that will tab through different date totals, from cycle or year to date, down to the last 7 days.
  - With this card, Crimson will remember what the user logged in last selected and this will become the default time frame for the next time they login.
  - Users can click on any of the labels to pull up a list of those gifts.
  - Users can also view this feature the Events Dashboard.

- **Donor Retention Rates by Cycle Graph and LYBNT & SYBNT Chart**
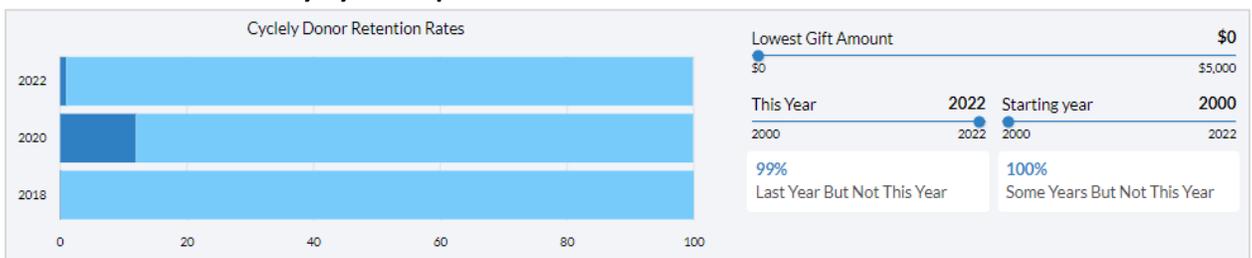
  - On the Fundraising Dashboard, users will find the new Donor Retention Rates by Cycle Graph. This will help them identify how many donors have been retained over the most recent three cycles.
  - The next chart will give users the total percentage of donors who gave Last Year But Not This Year and donors who gave Some Years But Not This Year. The default will show all, but users can narrow down the list by giving a lowest gift amount and changing the

years considered. Again, users can click the cards to view the list of people records from the total results.

- o These additions will make it easier to focus on retaining donors and recapturing those who might be at risk of falling off your donor list.

In addition to updating our dashboards, we refreshed the Giving History section in a People Profile, let's review.

- o **Giving History Panel**
  - o Here we can still view many of the important data points for the donor's giving history but laid out in an easier to read and visual format.
  - o In addition to highlighting all-time totals, pledges, soft credits, and consecutive giving, you can drop down Total Raised and Giving History to see more detailed numbers.
  - o Over on the right-hand side, you have new export options including exporting both the **All** and **Statement** view, this will be particularly helpful for profiles with a large giving and adjustment history, like WinRed.

- o **Fundraiser Assignment at the People Level**

  - o Earlier we saw Fundraiser Portfolio's on the Home Dashboard, now in Edit People Profile users can assign a fundraiser to a record.
  - o Simply open up the profile's details for edit and use the **Assign Fundraiser** field to assign a fundraiser to this donor.
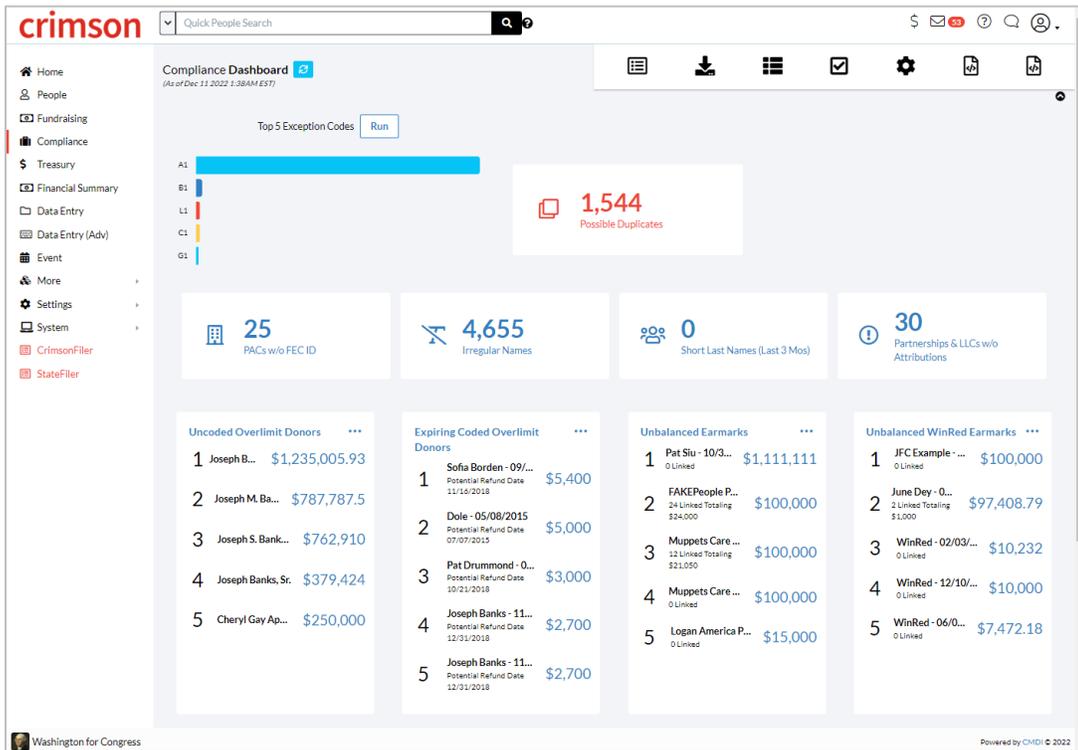 - o Please note, users can still assign a fundraiser to a gift from a money record.

We have also added helpful compliance new features for both our Federal and State filing clients:

- • **StateFiler Menu –** There is now a centralized state filing menu. Their, state filer users will have access to their corresponding state filing reports.

○ **Compliance Dashboard New Features**

○ "**Short Last Names (Last 3 Mos)**" Card –Provides a list of records with one or two character last names.
○ "**Unbalanced WinRed Earmarks**" List – Compares the WinRed parent record totals to the attached memos. Note, this does not factor in chargebacks/refund adjustments.
○ "**Bad Addresses (Last 3 Mos)**" List – Provides a list of records with potential bad addresses for review.
○ All new cards and lists are interactive so that a user may click on the donor and take the make the necessary compliance updates to the records.

In addition to these new features being rolled out now, we also wanted to highlight three of our more recently released features.

• **Email Integration**

○ Users can now integrate with either Mail Chimp or Constant Contact.
○ This allows them to set up one time or automatic data pushes from People Searches.
○ This is great for making sure you capture new donors into your existing email fundraising efforts.

- **BCC Tool**
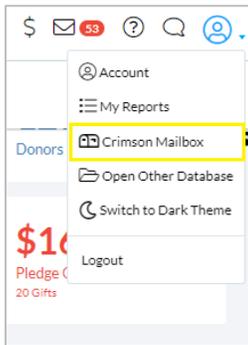
- o Users have a new BCC tool available.
- o When sending emails to donors or prospects, simply BCC the email address email@cmdi.com to have the email appear here with it's corresponding content.
- o From the user account menu, users can access their Crimson Mailbox.
- o Crimson will match the BCC'd messages to a People Record in Crimson using the receiver's corresponding user email address.
- o Users can then easily add the email as a note.

- **Moves Management Dashboard**
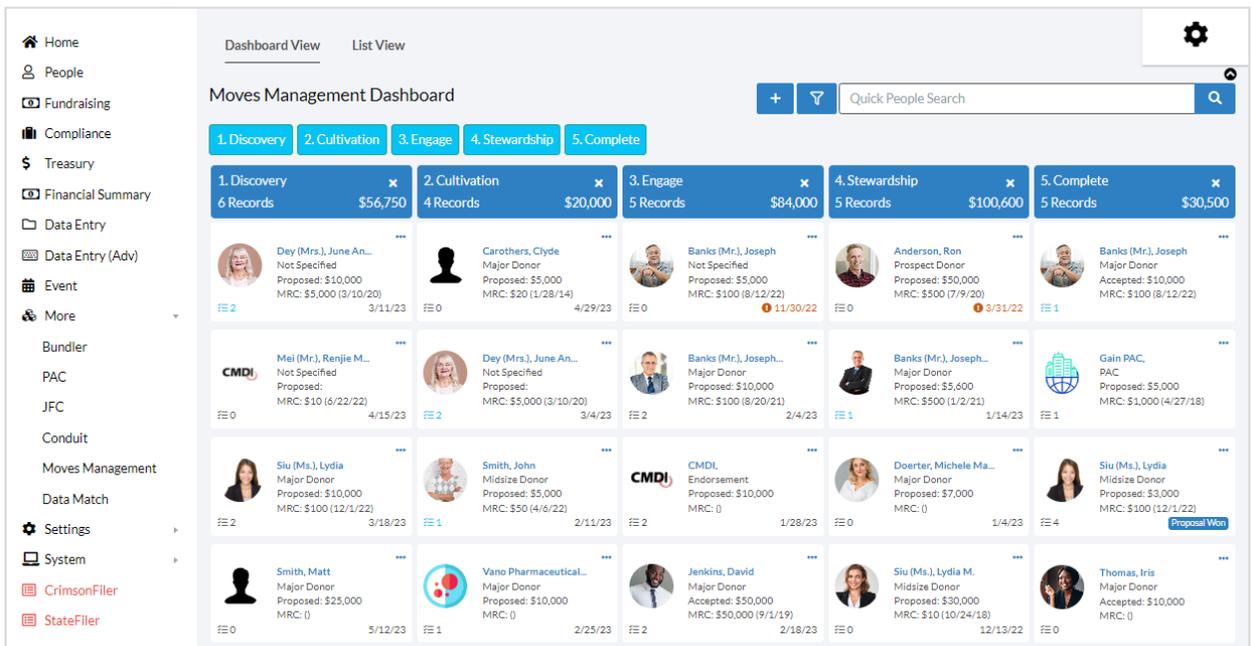
- o Moves Management is the process for fundraising teams to track the life cycle of donors, from prospecting stages, to receiving that final donation.
- o Here on the Moves Management Dashboard, users can quickly see all of the active moves, who is managing them, add a task or note, move them from one stage to the next, and more. The stages and plan types (major donors, prospects, etc.) are all completely customizable for your team's unique needs.

We know that this new dashboard refresh and additional features will benefit your team. Again, if you have any questions, please email us at crimsonsupport@cmdi.com.