crimson

FAQ – How Do I Assign Credit to a Partner for a Partnership Gift?

Question:

How do I assign credit to a Partner for a Partnership Gift?

Answer:

Partnership attributions are handled after batches or contributions have been loaded into Crimson. If the partners to whom you are assigning credit for a partnership gift do not already have People records in Crimson, first create those records using the **Add a Record** function from the **People Dashboard**.

*NOTE: **The Partnership Donor Profile (People Type = R - Partnership) and Gift need to exist in Crimson prior to assigning credit.** Please see the **Add a Record** guide for instructions on how to create a new **People** record. You may also want to see the **How Do I Import Partnership Attributions** FAQ if you prefer to import the attributions.

Below are instructions to manually apply the attributions one at a time:

1. To start, you will need to navigate to the contribution you wish to adjust. Find the gift using the **Money Search** which can be found on the **Fundraising** or **People Dashboard's Navigation Bar.**

2. Use the Filters to run a contribution search. Click [Run] when done.
3. Open the gift from the Results window by clicking on the [✎] button.
4. Click **Adjust**. An **Adjustment** and **Adjustment Date** field will appear.

5. Select **PT – Partnership Attribution** from the **Adjustment** drop-down menu.
6. The **Adjustment Date** will automatically be filled in with the current date. You may edit this date to reflect the original contribution date or the date when the partnership supplied you with this

information either manually or using the Calendar icon. *Please note: This is the date that will appear on your FEC report as the partnership attribution date.*

7. Enter the amount the partner should receive credit for in the **Adjusted Amount** field.
8. Search for the partner to credit using the **Donor id** search bar by ID or First and Last Name.
9. Click **Apply** to finalize the partnership adjustment.
10. Repeat this process for each partner until the full partnership gift amount has been attributed.