

Data Entry is the process of adding contributions into the database through batches. We recommend reading the [Batching and Caging Best Practices](#) solution before beginning data entry.

The screenshot shows the 'Data Entry' dashboard in the Crimson system. At the top, there is a 'Quick Data Entry' search bar and an 'Add' button. Below this is a table with columns: Batch Id, Loaded?, Batch No, Batch Date, Type, Fund, and # in H. The table contains several rows of batch data. At the bottom of the table, there are buttons for 'Save', 'Saved Searches', 'Recent Searches', 'Reset', and 'Run'. On the left side, there is a sidebar menu with options like Home, People, Fundraising, Compliance, Treasury, Financial Summary, Data Entry, Data Entry (Adv), Event, More, Settings, System, CrimsonFiler, and StateFiler. At the bottom left, it shows '6,625 records' and an 'Export' button.

Batch Id	Loaded?	Batch No	Batch Date	Type	Fund	# in H
175696	✓	246	10/25/22	Regular	Victory	1
175695		0245	10/12/22	Data Entry (Client)	PAC	1
175694		244	10/12/22	Data Entry (Client)	Primary 2022	10
175693		0243	10/11/22	Fast Keying	Primary 2022	5
175692	✓	242	10/5/22	Regular	Primary 2020	1
175691	✓	159	10/5/22	Regular	Primary 2022	1
175690	✓	0158	9/30/22	Fast Keying	Primary 2022	1
175689	✓	157	9/29/22	Regular	Victory	1

Data Entry Menu

- Click on **Data Entry** on the **Main Menu** to manage existing batches and/or start a new batch.
- A list of the most recent batches will display by default.
- Use the **Filters** to find a specific batch or narrow down the batch results.
 - **Opened** – Shows all open, unloaded batches only.
 - **Balanced** – Shows all open, balanced batches that are potentially ready to load.
 - **Loaded** – Shows all loaded batches only.

NOTE: Quick Data Entry Search at the top of Crimson can also be used to search for batches.

- To view/edit an existing batch, click  next to the Batch #.
 1. When viewing a **Loaded Batch** created from the Data Entry dashboard, use the  in the Donation Information section to navigate to the individual Gift Receipt to make changes.
 2. When you are done making changes, click .
 3. To navigate back to the Data Entry Receipt, click .
 4. To navigate to the original batch, click  again.

- The gift's edits will not affect the Batch Header totals, but will be reflected in the Database totals.

Batch Header > Receipt for #T001 ← Back ✕

People Information

Enter PID Auto Case? Address Type: Home

Donor Type: Individual

Donor Code: Donor

Prefix (Alt+1): Mr

First Name: Joseph

Middle Name:

Last Name: Banks

Suffix:

Search (Enter)

Find an Address:

Street (Alt+2): 2152 Evans Drive

Additional Address Line 1:

Additional Address Line 2:

City: Falls Church

State / Zip / Plus4: VA 22202

Occupation: Retired

Employer: Retired

Flag(s):

Keyword(s):

Home Phone: (703) 770-6032

Business Phone: (703) 314-4666

Fax: (###) ###-####

Cell Phone: (###) ###-####

Email Address: fia_05@hotmail.com

Spouse Primary Mail Record: Francis

Formal Salutation: Mr. Joseph

Informal Salutation: Joe

Mail Salutation: Mr. Banks

Mail Name:

Title:

DOB: 1/1/1970

Cancel Save + Edit Record Save + Add \$

Batch Summary

Batch Total # of Items	50	Batch Total \$	\$ 4,000
# of Items Keyed	27	Total \$ Keyed	\$ 2,109
# of Items Loaded		Total \$ Loaded	\$

Fund	Total	Remain
RVC1	\$ 0	\$ 200,0
RV	\$ 0	\$
P2022	\$ 8,900	\$ Maxe-
P2020	\$ 17,25	\$ Maxe-
P2018	\$ 10,72	\$ Maxe-
NC2	\$ 11,20	\$
G2022	\$ 2,710	\$ 190
G2020	\$ 500	\$
G2018	\$ 8,415	\$ Maxe-
C-PAC	\$ 0	\$ 5,000
TOTAL	\$ 59,69	\$

- To delete an existing batch (only if it contains no gifts), click  next to the Batch #.
- Export the batches listed on the screen by clicking  in the bottom left corner.

To learn more about the new search features and quick searches, see the [Crimson – New Search Features](#) guide and [Crimson – Quick Searches](#) guide on our HelpDesk.

Creating a New Batch

- To create a new batch, click the  button. A batch header will appear with the fields described below to be completed:

Data Entry - Edit Batch Header #11 ✕

Batch Number: 11

Default Fund Code: RV - Victory

Batch Date: 10/25/2022

Default Source Code: 0001 - TEST1234

Number of Items: 1

Default Account Code: N/A - N/A

Total Amount \$: \$ 100

Default Channel: Unspecified

Enter Transaction

Keyed Records for Batch:

Name	Street	City	State	Zip
No data to display				

Navigation: << < 1 > >> 10 items per page 1-0 of 0 items

Batch Summary

Batch Total # of Items	1	Batch Total Amount	\$ 100
# of Items Keyed		Total Amount Keyed	\$
# of Items Loaded		Total Amount Loaded	\$

Enter the batch number to be assigned to all gifts in the batch. **NOTE:** Batch # is limited to 4 characters (alphanumeric) and the same batch # cannot be used more than once on a single date. For more information, see the [Crimson FAQ: Batch Numbers](#).

***Batch Number**

Use the red arrow next to the Batch Number field to auto assign the next numeric batch #. The auto assigned numbers will start with 1001 and each time it is used, it will look at the last batch number and numerically add 1 to it.

***Batch Date**

Batch date is the gift date used in search outputs, FEC reports, and is the primary contribution date used in all reports. It is applied to all transactions in the batch.

***Number of Items**

Enter the number of contributions that will be loaded in this batch. A single check split between two donors should count as one gift. You can only load the batch when the number of items and total amount \$ equal what is keyed.

***Total Amount \$**

Enter the total dollar amount for all receipts you expect to enter into this batch.

***Default Fund Code**

Fund Code represents where the funds are going (ie. the election or committee). Each batch may use multiple Fund Codes, though only one will be listed as a default. Examples: P2020 (Primary 2020), G2020 (General 2020), etc.

***Default Source Code**

If an entire batch (or most of it) uses the same source code, select it as the default to save time and auto populate that code during data entry. Manually change it per contribution should it differ from the default.

Default Account Code

Track the bank account each gift is deposited into. This is not a required field.

Default Channel

Identify the channel a gift was received through. It can be used in addition to the Program, Initiative, and Source Codes, but is not a required field. (Ex: Web, Email, Phone Call, Private Meeting, etc.)

2. Once all batch header information have been entered, click , or click  to clear the information entered.
3. Begin entering receipts into the batch. **NOTE:** all fields with an asterisk (*) are required fields.

Entering Receipts for a Batch

1. After saving the batch header, click  to open the **Receipt Data Entry** window and start entering receipts.
2. Search for existing records in Crimson by using the **Enter PID** field or any of the blue bordered fields (First Name, Last Name, Street, City, State, and Zip). Then, click **Enter** on the keyboard or click the **Search** button. Select the donor from the results, by clicking the check button.

Donation Information

Amount (Alt+3) \$ <input type="text"/>	Payment Type CH - Check	Track# <input type="text"/>	Comment <input type="text"/>
Fund G2022 - General 2022	Check/CC Number <input type="text"/>	FEC Memo Text <input type="text"/>	
Source Code + 0001 - TEST1234		Exception Code <input type="text"/>	
Channel Unspecified		Exception Date <input type="text"/>	
Account N/A - N/A		Adjustment Type <input type="text"/>	
Received Date <input type="text"/>			

NOTE: When you enter new donor information in the blue bordered fields, Crimson will try to match it to existing records and will prompt you if any are found. If no match is found, the record will be saved as new.

- Existing donors display a summary of receipt totals per **Fund** to the right of this screen. It will note how much they have available to give based on Fund Code limits or if they are maxed out.

Batch Header > Receipt for #T001 ← Back ✖

People Information

Enter PID <input type="checkbox"/> Auto Case? 74157789	Address Type Home	Flag(s) <input type="text"/>	Spouse <input type="checkbox"/> Primary Mail Record Francis
Donor Type Individual	Find an Address <input type="text"/>	<input type="text"/>	Formal Salutation Mr. Joseph
Donor Code Donor	Street (Alt+2) 2152 Evans Drive	Keyword(s) <input type="text"/>	Informal Salutation Joe
Prefix (Alt+1) Mr.	Additional Address Line 1 <input type="text"/>	<input type="text"/>	Mail Salutation Mr. Banks
First Name Joseph	City Falls Church	Home Phone <input type="text"/>	Mail Name <input type="text"/>
Middle Name <input type="text"/>	State / Zip / Plus4 VA 22202	Business Phone <input type="text"/>	Title <input type="text"/>
Last Name Banks	Occupation Retired	Fax <input type="text"/>	DOB 1/1/1970
Suffix <input type="text"/>	Employer Retired	Cell Phone <input type="text"/>	
Search (Enter)		Email Address fia_05@hotmail.com	

Batch Summary

Batch Total # of Items	Batch Total \$
50	\$ 4,000
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27	\$ 2,109
# of Items Loaded	Total \$ Loaded
	\$

Fund	Total	Remain
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TOTAL	\$ 59,69	\$

Cancel
Save + Edit Record
Save + Add \$

- Complete the receipt entry. See **Data Entry Fields** at the end of this guide for more details.

Donation Information

Amount (Alt+3) <input type="text" value="\$"/>	Payment Type <input type="text" value="CH - Check"/>	Track# <input type="text"/>	Comment <div style="border: 1px solid #ccc; height: 40px;"></div>
Fund <input type="text" value="G2022 - General 2022"/>	Check/CC Number <input type="text"/>	FEC Memo Text <input type="text"/>	
Source Code + <input type="text" value="0001 - TEST1234"/> ✖		Exception Code <input type="text"/>	
Channel <input type="text" value="Unspecified"/>		Exception Date <input type="text"/> 📅	
Account <input type="text" value="N/A - N/A"/>		Adjustment Type <input type="text"/>	
Received Date <input type="text"/> 📅			

5. Save the receipt with one of two options:

- Click Save + Edit Record to save the transaction to the batch and then open the people record to make updates to the profile
- Click Save + Add \$ to just add the transaction and continue to key in the next gift
- **NOTE:** click Cancel at any time to undo changes and close the data entry window.



6. Click the ← Back button at any time to return to the data entry screen or batch header.

7. Continue to enter receipts until the batch is completed. **NOTE:** a batch can be left open as needed. The batch details can only be seen from the open batch until it has been loaded.

Loading a Batch

1. The black **Batch Summary** box to the right tracks what has been entered so far in that batch. Once this is balanced with the **Batch Header**, the batch is complete and ready to be loaded.

Batch Summary	
Batch Total # of Items	<input type="text" value="1"/>
# of Items Keyed	<input type="text" value="1"/>
# of Items Loaded	<input type="text" value="1"/>
Batch Total Amount	\$ <input type="text" value="5000"/>
Total Amount Keyed	\$ <input type="text" value="5000"/>
Total Amount Loaded	\$ <input type="text" value="5000"/>

Load Transactions

2. When the batch is complete, the **Load Transactions** button will become active. If this button is grayed out, continue entering receipts until your batch is balanced or adjust the header accordingly.
3. Click the green pencil icon to the left of the receipt to edit a record before loading.
4. Once the batch is balanced, click **Load Transactions**.

Data Entry Fields

Below are the field options available when keying a contribution.

- Fields highlighted in **blue** can be used to search for existing donor records.
- Fields with an asterisk (*) are required.

People Information

Auto Case?

Auto Case is enabled by default. Uncheck the box to disable. Last used setting for this field will save for each subsequent receipt until the batch is exited.

Enter PID

Look up an existing donor's record using the unique Crimson PID.

*Donor Type

Defaults to "Individual". Use the drop-down to change it to other types such as Multi-Candidate PAC, Candidate Campaign, etc.

*People Code

Defaults to "Donor". Use the drop down to change it, if needed.

Prefix

Prefix field for an individual. Ex: Mr., Mrs., etc.

First Name

First Name field for an individual.

Middle Name

Middle Name field for an individual.

*Last Name/Org Name

Doubles as the Last Name field for an individual or an Organization's Name field.

Suffix

Suffix field for an individual. Ex: Jr., Sr., etc.

Address Type

Defaults to "Home". Use the drop down to update it. Ex: "Business".

Find Address

Begin typing the address in this field to look up the standardized version of it or go directly to the Street field to manually complete all address fields.

Street

Street field, the first line of the address.

Address 1

Address 1, the second line of the address.

Address 2

Address 2, the third line of the address.

City

This is the City.

State

This is the State.

Zip Code

This is the Zip Code.

Occupation

Donor's Occupation.

Employer

Donor's Employer.

Flag(s)

Add up to 6 Flags. Start typing the Flag code and select it from the drop-down. See [People Settings](#) to add new Flags.

Keyword(s)

Add up to 6 Keywords. Start typing the Keyword code and select it from the drop-down. If that Keyword does not exist, the code you typed will be added as a new Keyword to Crimson when saved.

Home Phone

Donor's Home Phone number.

Business Phone

Donor's Business Phone number.

Fax	Donor's Fax number.
Cell Phone	Donor's Cell Phone number.
Email Address	Donor's primary Email Address.
Primary Mail Record	Enabled by default and can be used for house holding purposes.
Spouse	Spouse Name field.
Formal Salutations	This is 1 of 4 salutation fields available. The format of this field can be established by your organization. Ex: Mr. Banks.
Informal Salutations	This is 1 of 4 salutation fields available. The format of this field can be established by your organization. Ex: Joe.
Mail Salutations	This is 1 of 4 salutation fields available. The format of this field can be established by your organization. Ex: Mr. and Mrs. Banks.
Mail Name	This is 1 of 4 salutation fields available. The format of this field can be established by your organization. Ex: Joe and Ellen Banks.
Title	Used to describe the donor's title, not the same as using Occupation .
DOB	Enter or use the calendar selector for the donor's Date of Birth.

Donation Information

*Amount	This is the contribution's amount. Enter the full amount received.
*Fund	Also known as the election or committee code. Ex: P2020, G2020, PAC, etc.
*Source Code	This is the Source Code telling you where the contribution came from.
Channel	Used to identify the channel a gift was received through. Can be used in addition to the Program, Initiative, and Source Codes, but is not a required field. Ex. Web, Email, Phone Call, Private Meeting, etc.
Account	Used to track the bank account each gift is deposited into. This is not a required field and the code will default to "N/A".
Received Date	This is a secondary date field. Can be used as deposit date, etc.
Payment Type	Defaults to "CH - Check". Can be changed using the drop-down menu. If any of the Credit Card options are selected you will see 4 additional fields including an option to Process CC Now? if credit card processing is enabled for the database.
Check/CC Number	Enter the check number or first 4/last 4 of the donor's CC here. This is NOT where you enter a full CC for processing. See " Process CC Now? ".
Recurred end on/Monthly	Used to track recurring gift details. Setup future monthly recurring gift processing if the CC is processed in Crimson during data entry.
Process CC Now?	Available when CC processing is enabled. Contact CrimsonSupport@cmdi.com for more information. Click this button to open the CC processing fields.
Card Exp Date	Enter the Card Expiration Date here for CCs not processed in Crimson. Crimson will auto-fill this field when the database processes the card.
Approval Code	Enter the Card Approval Code here for CCs not processed in Crimson. Crimson will auto-fill this field when the database processes the card.
CC Transaction ID	Enter the Card CC Transaction ID here for CCs not processed in Crimson. Crimson will auto-fill this field when the database processes the card.
Track #	If Bundler Tracking is enabled, use this field to search and assign an existing bundler ID to the gift. Start typing the bundler's Name or ID to look them up and then select the bundler from the drop-down menu.

FEC Memo Text	Use to create specific memo text that will appear on the FEC report.
Exception Code	Use the drop-down to apply Exception Codes. Depending on the exception code used, Crimson will automatically apply memo text to your entry on the FEC report. For more info, see Crimson - Exception Codes on our HelpDesk.
Exception Date	This is the exception code date associated with the code assigned.
Adjustment Type	Select Split - Partial , Reattribution - Presumptive , or Redesignation - Partial to apply an Adjustment from the drop-down menu. Follow the red text that appears on screen to complete the next portion of the adjustment. Crimson may auto apply memo text to your entry on the FEC report.
Comment	Use to save a comment for internal reference. This field will not pull on FEC reports.