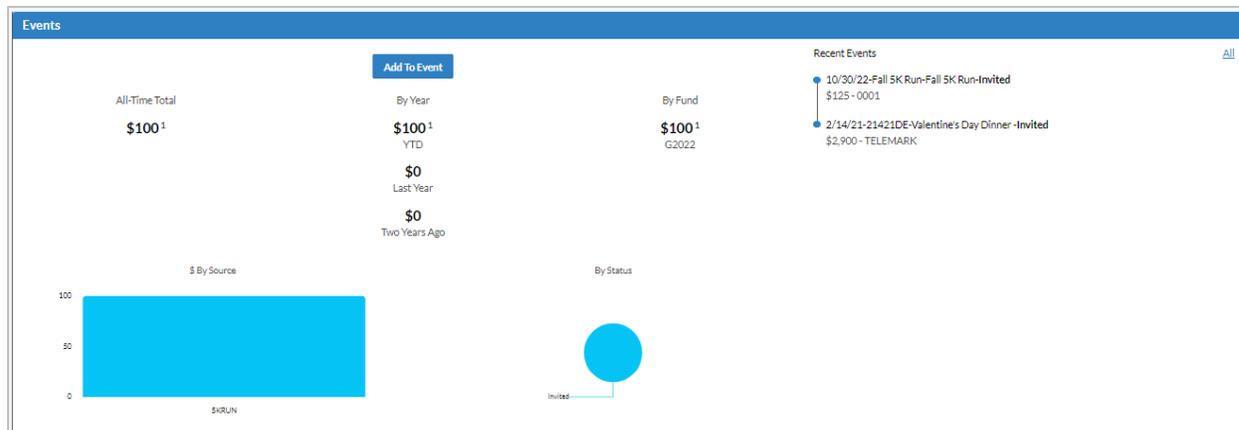


Crimson allows you to create and manage your fundraising events. Below are the steps to add an invitee to an event via their people record profile.

## Adding an Invitee to an Event via his/her People Record

1. To add invitees through their records, open their **People record** and click the **Events** panel. A list of events to which that record had already been added to will appear along with an overview.



- Click the **All** button to access all the events the donor has previously been invited to. In the new window, click  to edit an existing event under the record.
  - Click the  button to delete an event from a record.
2. Click the **Add To Event** button. An **Add Event Participation** editor window will appear for editing. Use the **Event Search Bar** to search for the event by **Description** (not by **Event Code**) and select the corresponding event from the drop-down list that appears.
  3. The **Event Code** and **Description** will prefill at the top of the window. Select **Invited**, **Confirmed**, **Declined**, etc. from the **Status** drop-down menu. To add or edit your existing Event Statuses, select **Settings** from the left **Main Menu** and select **People**. Open the **Event Status** tab to create/edit your event statuses.
  4. If the person has RSVP'd, enter the **RSVP** date in the field or click the calendar icon to select it from the calendar. You may enter a table assignment in the **Table #** field and any additional info in the **Comment** field. You can also edit the **Invitee Type** by using the drop down list.

People Profile > Event Participation > Edit Event Participation ← Back 

### Edit Event Participation

Mr. Joseph M. Banks, Sr. (76002676)

**Edit** Questions Payments Pledges Guests

**Process \$** **Un-Check In**

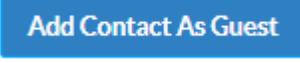
Status  
Invited

RSVP  
 

Comment

Table #

Invitee Type

5. Click  to add the Event to the **People Record**.
6. Now in the **Edit Event Participation** window, you will see the following options: **Edit**, **Questions**, **Payments**, and **Guests** as well as buttons to **Process \$** and **Check In**.
7. You may enter any answers to questions associated with the event under the **Questions** section.
8. Under the **Payment** section, an existing live contribution can be linked to the event by clicking . A list of the **Donor's Gifts** will display. Click the  button to link that contribution as a payment to this event or click the  button to unlink an existing contribution as a payment.
9. Add guests associated with that invitee (e.g. when the invitees are allowed one or more guests or if the "invitee" is an organization/PAC). Under the **Guests** section, a list of existing guests will appear with a couple of controls. Click  to open a **Donor's Contacts** section and select guests from the list of contacts associated to that People record. Select the contact you wish to add as a guest by clicking . To add a guest who is not listed as an existing contact, click  to open an **Add Guest** window. Enter the basic info about the guest in the fields. After you click **Save**, you will have the option to add more details under the Edit section or specify answers to any existing questions for that event within the **Question** section. Click **Save** or **Cancel**.
10. To process a new payment or pledge associated with the event, click . A **Ticketing** window will appear where you can either process a credit card payment now or record a **Pay Later (Pledge)**. You can use the **Ticketing** toggle to update the number of tickets being purchased. When you are done click .

People Profile > Edit Event Participation > Event Donation ← Back ✖

Donation for Event: Fall 5K Run - Fall 5K Run



Mr. Joseph M. Banks, Sr.  
PID: 76002676  
Donated: \$125  
Pledged: \$0  
CTD: \$5,100

1593 Spring Hill Rd Suite 401 Vienna, VA

Pay Now (CC)

Amount \$

Fund Code

Source Code

Track#

Comment

Pay Later (Pledge)

Disclaimer  Edit

I affirm that the donor has been notified of the following and has authorized this permissible credit card charge.

1. Contributions are not tax deductible as charitable contributions for federal income tax purposes.

More than one Source Code has been linked to this event. Be sure to select the correct Source Code. Individuals, partnerships, S corporations, labor unions, foreign nationals (without a green card) and government contractors are not eligible for this type of contribution. Contributions must be made from personal funds and cannot be reimbursed by another. We request that you obtain and report the name, mailing address, occupation and name of employer for each Individual Source Code. This aggregate in excess of \$200 per election cycle.

Fund	Total	Remain
RV	\$ 5000	\$

11. Lastly, you can use the Check In button to electronically check the **Donor** into the event.

Simply click Un-Check In button to reverse this action.

For more information about how to edit Events, see the [Crimson – Editing Event Details](#) guide on the HelpDesk. To import invitees to an existing event instead of adding them one-by-one, see the [Crimson - Events Module Import Guide](#) on the Crimson HelpDesk.