crimson

The Crimson **Bundler Dashboard** provides an overview of the bundler or fundraiser data by displaying total bundled by date, total bundled by fund code, outstanding pledges, incentive totals, shared totals, commitment totals, top 5 bundlers, top 5 recruiters, top 5 lobbyists, top 5 locations, and bundlers with unmet goals.

- There is a **Dashboard Navigation Bar** at the top right corner of the page where you can access the:
  - **Bundler Search**
  - **People Search**
  - **Money Search**

- There are **Dashboard Active Buttons** on the dashboard such as:
  - **New Gift**
  - **New Pledge**
  - **Add a Record**
  - **Process Donation**

These allow you to complete tasks related to bundler data without leaving the dashboard.

Please note, that the **Process Donation** button or **Donate Now** is only available if your database has an active MeS (Merchant e-Solutions) merchant account associated to Crimson. For more information about this feature, please contact CrimsonSupport@cmdi.com.
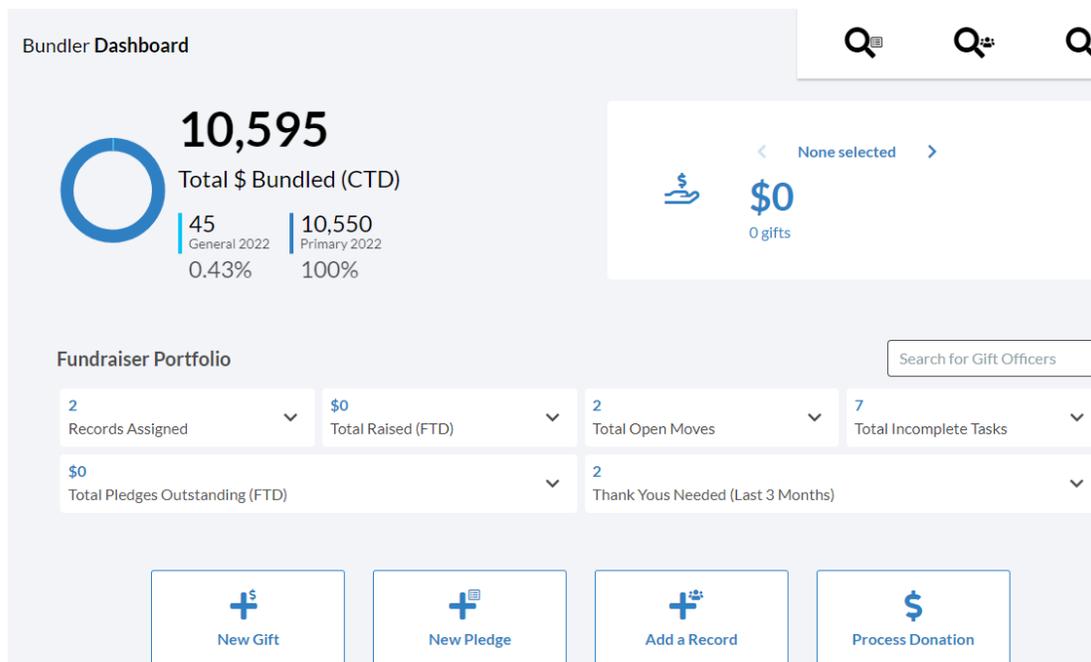
- The first section of the dashboard breaks down your bundled contributions by fund codes and shows how much has been raised for different date ranges. When you select a particular fund code in the top left pie graph, the totals beneath Year-to-Date, Quarter-to-Date, Month-to-Date, Week-to-Date, Past 30 Days, and Past 7 Days will update to reflect bundled contribution totals specific to that fund code.
- Click on the information shown on the blue or green **cards** to generate a list that consists of that total amount displayed on the card (either via a **Search** or related Crimson report) or to be taken to the related report for you to run.

- The **top 5 lists** provide summary information based on total raised amount (CTD or YTD) such as top 5 bundlers, top 5 recruiters, top 5 lobbyists, top 5 locations (broken down by state, city, county, CD, region, and metro area), top 5 groups, and top 5 bundlers with unmet goals.
- When you click a record in the **top 5 lists**, the corresponding record or the list from the **Money Search** or **Bundler Search** that make up that total amount will be generated.

Top 5 Bundlers - Total $ Raised (CTD)		
1	Dori Gerber-Snody / Track#: 1000	$10,500
2	Joseph Bailey / Track#: 12457	$50
3	June Dey / Track#: 3100	$0
4	Lydia Siu / Track#: 2345	$0
5	Leslie Smith / Track#: 3003	$0

Top 5 Recruiters - Total $ Raised (CTD)		
1	Dori Gerber-Snody / Track#: 1000	$10,500
2	Joseph Bailey / Track#: 12457	$50
3	Evelyn Smith / Track#: 135746	$0
4	John Smith / Track#: 6666	$0
5	Rose Evans / Track#: 10000102	$0

Top 5 Lobbyist - Total $ Raised By Fund (YTD)		
1	Joseph Banks / Track#: 3876	$100

Top 5 States - Total $ Raised (CTD)		
1	VA	$10,500
2	IL	$50
3	OR	$30

Top 5 Cities - Total $ Raised (CTD)		
1	Vienna, VA	$10,500
2	Carbondale, IL	$50
3	Pendleton, OR	$30

Top 5 Counties - Total $ Raised (CTD)		
1	FAIRFAX (VA)	$10,500
2	JACKSON (IL)	$50
3	UMATILLA (OR)	$30

Top 5 Groups - Total $ Raised (CTD)
None found

Bundlers With Unmet Goals (CTD)
None found

Bundlers Reports	
1	Donors w/o Tracking# by CTD / #235
2	Donors by Cycle To Date Amount / #2900
3	Pledge Summary Report by Region / #2230
4	Pledges by Tracking Number / #2206
5	Bundler and Recruiter Detail / #240

- When you click the **···** button in any of the **top 5 lists** more records will be generated in an exportable list than just the top 5 displayed.

- A list of Crimson **Bundlers Reports** are available at the bottom of the Bundler Dashboard. You can run these reports by clicking the report's title. Click the button to display a list of all reports.