crimson

How to Add a Conduit Recipient to Crimson

To use the Crimson Conduit Distribution module, you must create people records for each recipient and create a unique Conduit ID to be used later for distribution. Take the following steps to add a recipient to Crimson:

1. If the record already exists, do a **People Search** for the recipient's profile. If the record does not exist yet, go to **Import/Data Entry** and select **Add a Record**. Create the profile then click **Save** when done.

2. You should now be in the recipient's profile. Click on the Conduit panel to edit the **Conduit**

Conduit

Conduit #

0

Total Raised

$0

3. The **Conduit** page will appear. Complete the fields below, then click **Save**.
   - Note: the **Conduit No**. is created by the client. It should be unique to the recipient.

Conduit

Field	Value
Conduit No	99999
FEC ID# Lookup	FEC ID# Lookup
Committee	Candidate for Senate
FEC Cmte Id	C00044444
Candidate Prefix	
Candidate First Name	George
Candidate Middle Name	
Candidate Last Name	Washington
Candidate Suffix	
Candidate FEC id#	S4P444444
Election	P - Primary
Year	2026
Other Election	
Office	S - Senate
State	VA
District	
Comment	

ACTIVE

How to Track Donations for Conduit Distribution in Crimson

crimson

Once all recipients have a profile with a unique Conduit ID established, you can apply the ID to gifts via import or their gift's detail screen.

Gift's Detail Option:

1. Look up the existing Donor record using **People Search**, or the gift using **Money Search**, and open the gift details screen.

2. Click on the [**Add Conduit**] button in the fourth column.

Fundraiser

Track#

3011 - Amos D. Mcnair ✕

Amount

$ 500

[**Add Fundraiser**]

Conduit

[**Add Conduit**]

Conduit# [x]

Amount   Distrib?
$ 500   ☐

Fee
$

Net
$

---

3.   Start typing the recipient's name or Conduit ID, and then select the correct record from the drop down that will appear.

4.   Enter the amount of the gift being attributed to that ID.

** You can add additional Conduit recipients to a single gift using the [**Add Conduit**] button, until done. You'll want to be sure the total of the conduit recipient amounts matches your original gift amount.

5.   Enter the related conduit Fee. The Net fee will auto calculate.

6.   Click [**Save**] when done.

Conduit

[**Add Conduit**]

Conduit# [x]

Amount   Distrib?
$ 500   ☐

Fee
$

Net
$

Below are helpful tips for importing a list of donations given for conduit distribution:

- When creating your file for import, be sure to include at least one column for "**Conduit No**" (this will be the unique ID you assigned to the conduit recipient), and one column for "**Conduit Amount**" (the amount of the gift being distributed to that recipient).
- You can import up to 15 conduit recipients. To do so, make sure your file has columns setup like: "**Conduit No 1**", "**Conduit Amount 1**", "**Conduit Fee 1**", "**Conduit No 2**", "**Conduit Amount 2**", "**Conduit Fee 2**", "**Conduit No 3**", "**Conduit Amount 3**", etc.
- If there is more than one recipient for the gift, you want to be certain the total of the conduit amount fields add up to the total of the gift amount.
- When your file is ready, follow the regular steps to Importing a List of New Contributions. When mapping your fields, be sure to use the "**Conduit No 1**", "**Conduit Amount 1**", "**Conduit Fee 1**", "**Conduit No 2**", "**Conduit Amount 2**", "**Conduit Fee 2**", etc. fields.

How to Enter a Conduit Distribution in Crimson

Once all donations have been loaded to the database, you will want to take the follow steps to track the conduit distribution:

1. Go to the **More** menu of Crimson on the left side menu bar and select the **Conduit** submenu option.
2. The Conduit Dashboard will display with a summary of distribution details.
3. To start a new distribution click New Distribution on the Conduit dashboard.
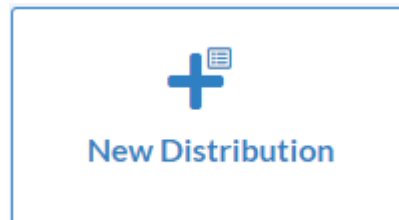
4. Enter your filter criteria for the distribution

New Conduit Distribution

- **Fund Code** – Enter the Fund Code for the Committee making the distribution
- **Batch Date** – Enter the date range for the gifts you want to pull into the distribution
- **Conduit #** – Select the conduit recipient. You should select only one per distribution.

5. Click **Run** when done entering the search criteria.

6. Review the donations for distribution on the screen or click **Export** to review in Excel.

7. Click **Create Distribution**, located in the lower left footer of the screen, when ready to move forward.

8. Complete the distribution details.
- **Conduit No** – This is the Conduit Recipient of the distribution.
- **Date** – This is the date of the distribution. This date will be reportable to the FEC.
- **Comment** – This is any comment you want to record for the distribution. This will not be included in the FEC report pull.

9. Click **Yes** when done.

10. You can go back to the **Distribution Search** to view the newly created distribution.

Click on ✏ to open the newly created distribution.

	Distribution Id	Conduit No	Distribution Date	Conduit Name	Elect Code	Elect Year
✏ ✖	74	99999	10/18/22	Candidate For Senate	P	2016
✏ ✖	73	1	1/26/22	Conduit		

11. Review the conduit distribution, then click **Complete Distribution** when done. A corresponding **Expenditure** will get automatically be created in Crimson as a result and the distribution status will update from Pending to Complete.