crimson Crimson – Events – Edit an Invitee

Crimson allows you to manage each Invitee of an Event. You can open an existing event via the **Event Search** or **Event Dashboard**. Once an event is opened, navigate to the **Invitees'** tab to view your invitees.

For information on how to add new Event Invitees, please see the guide on the **Event Import** and adding via the **People Record**.

Edit

There are two ways to edit an Invitee. The first is to edit directly from the **Invitees'** tab. From here, you can access several edit options using the icons.

- will open up the full **Edit Event Participation** window.

- will open up the Invitee's **People Record Profile** window.

- will remove the record from the Event.

- opens up the **Payment Processing** window, allowing you to add ticketing information by processing a contribution or saving a Pledge.

- can be used to check in the Invitee on the day of the event.

- allows you to adjust the **Event Status** for the Invitee. Manage the statuses in **People Settings**.

To access all edit options, including those above, click [✏] next to any Invitee's record. This will open a new window, **Edit Event Participation**, the second option for editing an Invitee from the **Event Module**.

- Click the **Process $** button to process a credit card for the Invitee now or create a pledge for the Invitee for this event. For more information on **Payment Processing**, please see the guide.

  Click the **Check In** button to mark the Invitee as checked in to the event.
- To update an Invitee's **Status**, open the drop-down list and select the new status from the available options. From this tab, you can also change the optional Invitee fields for **RSVP** date, **Comments**,

 **Table #**, and **Invitee Type**. Click **Save** to update the Invitee.

Note: You can manage the **Event status** and the **Invitee Type** options from **People Settings**

Questions

You can edit the Invitee's answers to each question assigned to your Event from this tab. Click on the blank space to the right of any question to open the field to type in your answer. To save, click ✔️.

Chicken or Beef		✔ ✖

Payments

This tab lets you view existing payments connected to this Event for the Invitee and add new ones.

- To **Link a Gift**, click the 🔗 Link Gift button. This brings up a list of the Invitee's gifts. To link a gift, click ✔️.

- You can also **Unlink** a payment. To do so, go to the payment you wish to unlink and click ✖️.

Guests

- To add a **New Guest**, click the **New Guest** button, fill out the necessary information in the **Add Guest** window and click either **Save + Add Record**, prompting you to create a new **People Record**, or **Save**, which will just add the information as a Guest.
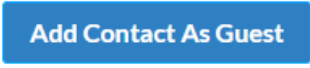
Add Guest

- If the Invitee has Contacts linked to its People Profile, you can **Add Contact as Guest** by clicking the **Add Contact As Guest** button and selecting the Contact from the list using the ✔.

	Edit	Questions	Payments	Pledges	Guests			

	Prefix	First Name	Middle Name	Last Name	Suffix	City	State	Table

No data to display

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New Guest   Cancel

Donor's Contacts

Search Contacts ✕

	Prefix	First Name	Middle Name	Last Name	Suffix	Street	City	State
✓				Taylor				

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