Crimson allows you to create and manage your fundraising events in the Event Dashboard. Follow the directions below to edit an Event's details.

To learn how to create an event, see the **Crimson – Creating a New Event** guide on our HelpDesk. To learn more about the **Event Dashboard** and/or the newest event features, see the **Crimson – Event Dashboard** and/or the **Crimson – New Events Features** guides on our HelpDesk.

Editing an Event

- Once you have opened an existing event via the **Event Search** or the **Event Dashboard**, you can view and edit the event's details under the **Edit** tab. Please note, the 3 required fields for events are **Event Code**, **Description**, and **Start Date**.

- For events that occur over multiple days, check the ☐ Multiple Days? checkbox to add a second set of date and time fields – **End Date** and **End Time**.

- You may add a goal fundraising amount in the **Goal $** field, a cost amount in the **Cost $** field, select the default **Fund Code** from the drop-down menu, and leave a **Comment**.

- For the event's location, you can use the [📍 Enter a location] tool to search for an address. As you begin typing in a location, the drop-down will suggest matching addresses. When you select one, the address fields will automatically populate for you and the location will be mapped below.

- You also have the option of manually entering an address into the **Street**, **City**, **State**, and **Zip** fields.

- You may add additional info such as the **Venue**, **Host**, or **Staff Lead** or check that the event is **Private Event** and **Enable Ticketing**.

- When you have entered all of your event's details into the fields, click **Save**.

Adding Invitees to an Event

- To add a new invitee, navigate to the **Invitees** tab and click the **+ Add Invitee** button and the **Search Invitee** window will appear. Search for the record by either PID, First Name or Last Name.

  Select the correct record in the list of results by clicking the ✓ button which will open an **Edit Event Participation** window.

- The **Event Code** and **Description** will display at the top of the page. Select **Invited**, **Confirmed**, **Declined**, etc. from the **Status** drop-down menu. To create/edit event statuses that display in the Event Status drop-down, go to the **Event Status** tab in **People Settings**.

- 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, add any additional info in the **Comment** field, or edit the **Invitee Type** using the drop-down menu.

- Click **Save** to save the Event details to the **People Record**.

- In the **Edit Event Participation** window, you will see the following options or tabs: **Edit**, **Questions**, **Payments**, and **Guests.**

- You may enter any answers to questions associated with the event for the invitee under the **Questions** section.

- The **Map** tab includes an interactive Google map that shows the location of your Event and all records in your database within a specific radius. The **Radius Search** feature can be found on the
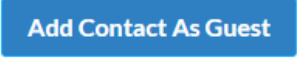
  bottom right by clicking the ☰ button.

  The **Radius Search** allows you to search for **People Records** with addresses near you event. You can change various parameters, including Search Range (Miles), CTD Amount, Highest Gift Amount, Last Gift Amount, Last Gift Date, and Invitation Status. After running your search, if you wish to invite all

  records within the radius after your search just click **Invite**, or you can click **Export** to Export.

- Under the **Payment** section, an existing contribution from the people record can be linked to the

  event by clicking the **⧉ Link Gift** button. A list of the **Donor's Gifts** will display. Click the ✓

  button beside the gift you want to link as a payment for this event. To remove a payment, click **✗**
  .

- You can 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 **Guest** section.

- Click **Add Contact As Guest** to open a list of the **Donor's Contacts** and select a guest from the list

  by clicking the ✓ button.

- To add a guest who is not listed as an existing contact, click **New Guest** to open an **Add Guest** window. Enter the information about the guest and click **Save**.

- To process a new payment or pledge associated with the event, click the **Process $** button. An **Event Donation** window with **Ticketing** options will appear where you can either process a credit card payment now or record a **Pledge**. You can use the **Ticketing** feature to update the number of tickets being purchased. When you are done click **Save**.


- Click the **Check In** button to electronically check the invitee into the event. Simply click the **Un-Check In** button to reverse this action and mark the invitee and not checked in.

Please note, you can choose to import an invitees list instead of adding records one-by-one by clicking the **Import Invitees button and following the import steps.

Editing Invitees in an Event
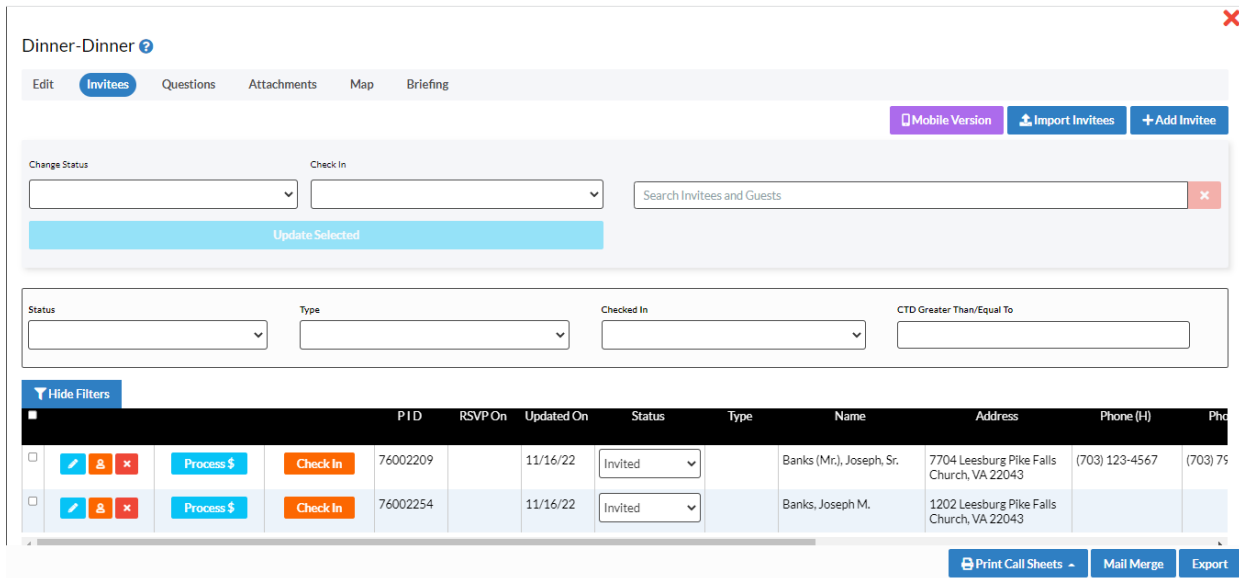
- The **Invitees** tab within the event's window will display a list of existing invitees. Use the **Search Invitees and Guests** quick search or the **Status**, **Type**, **Checked In**, and/or **CTD Greater Than/Equal To** filters to narrow down your list. Click the button to export your invitees list.

- The mass update functionality allows you to **Change Status** or **Check In** multiple invitees instead of having to update their information one at a time. You need to check the checkboxes for each invitee you want to update or you can check the checkbox at the left corner or the black header section to select all invitees and then click the **Update Selected** button.

- Scroll through the pages of the list of invitees using the left and right arrows or by clicking on the desired page number at the bottom. Control how many invitees you would like to have displayed per page: 5, 10, or 20.

- To open an invitee's record, click the button which will take you to the record's **Edit Event Participation** window.

- To open an invitee's people record, click the button to see the people record's profile.

- To delete an invitee from an event, click the button.

- To print a profile or call sheet for all of the invitees, click the **Print Call Sheets** button and select the type of profile you wish to print from the drop-down menu.

12/08/2022

Full Profile

Brief Profile

Pocket Profile

PAC Profile

🖨 Print Call Sheets ▾
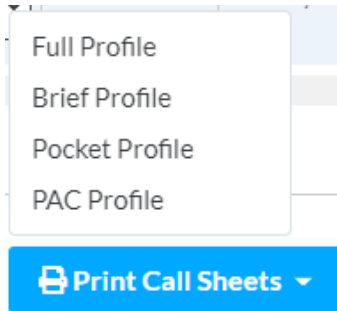
- To run a Word Document Mail Merge on your Invitee List, click the **Mail Merge** button. For more information on Mail Merge, please review the [Crimson: Mail Merge](#) guide.

- To add new invitees to an event, click the **➕ Add Invitee** button to add invitees one-by-one or click the **⬆ Import Invitees** button to import a list of invitees.

- To process a new payment or pledge associated with the event, click the **Process $** button. An **Event Donation** window with **Ticketing** options will appear where you can either process a credit card payment now or record a **Pledge**. You can use the **Ticketing** feature to update the number of tickets being purchased. When you are done click **Save** .

- Click the **Check In** button to electronically check the invitee into the event. Simply click the **Un-Check In** button to reverse this action and mark the invitee and not checked in.

Adding/Editing Questions in an Event

- You can add questions to an event under the **Questions** tab in the main event edit window. This allows you to specify certain information for each invitee. Click the **➕** button, enter the question in the text field that appears, and then click the **➕** button to add it to the event.

- To edit an existing question, double click on the question, make your edits, and then click the **✔** button. If the question requires a numeric answer, click the checkbox in the **Numeric** column once to enable it.

- To delete an existing question, click the **✖** button. A confirmation message will appear asking: "Are you sure to delete this question?". Select **Yes** or **No.**

- When in an invitee's **Edit Event Participation** window, you can complete the answers in the record's **Questions** tab.

Adding/Editing Attachments in an Event

- You can add/edit attachments in an event under **Attachments** tab. To add an attachment, click the

  button and select the file from your computer.

- To download an existing attachment to your computer, click the   button.

- To send an existing attachment as an email, click the   button, complete the email address (ie. To, CC, Subject, and Message), and click **Send**.

- To delete an existing attachment, click the   . A confirmation message will appear asking: "Are you sure to delete _____". Select **Yes** or **No**.