

The **Radius Search** tool allows you to find all donors within a set vicinity of a specific address. Radius Search is helpful when looking for donors to invite within 25 or 50 miles of an event.

There are two ways to run a Radius Search: the Event dashboard and People Profile.

How to Use Radius Search from the Event Dashboard:

1. Click on the **Event** dashboard on the main menu. Then click on the blue **Upcoming Events** card.

The screenshot shows the Crimson Event Dashboard. On the left is a navigation menu with items: Home, People, Fundraising, Compliance, Treasury, Financial Summary, Data Entry, Data Entry (Adv), Event (highlighted), More, Settings, System, and CrimsonFiler. The main content area is titled 'Event Dashboard' and contains six cards with the following data:

- Total Raised: \$507,776 (56,044 gifts)
- Net Raised: \$507,493 (56,044 gifts)
- Invitees: 50,274
- Upcoming Events: 0
- Outstanding Pledges: \$22,796.2 (66 Pledges)
- Events Not Linked To A Source Code: 132

2. Select the event you wish to search around and click on the blue  button.

The screenshot shows the 'Event Search' interface. It includes a search bar, an 'Add' button, and a table of search results. The table has columns for Event Code, Description, Start Date, End Date, Amount Received, Outstanding Pledges, and # of Invites. There are three rows of data:

Event Code	Description	Start Date	End Date	Amount Received	Outstanding Pledges	# of Invites
ev111132	test event	10/25/22				1
ev11111	test event	10/25/22				1
EV2001	Dinner Fundraiser	8/15/22				2

3. Once the event is open, click on the **Map** link at the top of the page.

EV001-Announcement Dinner ?

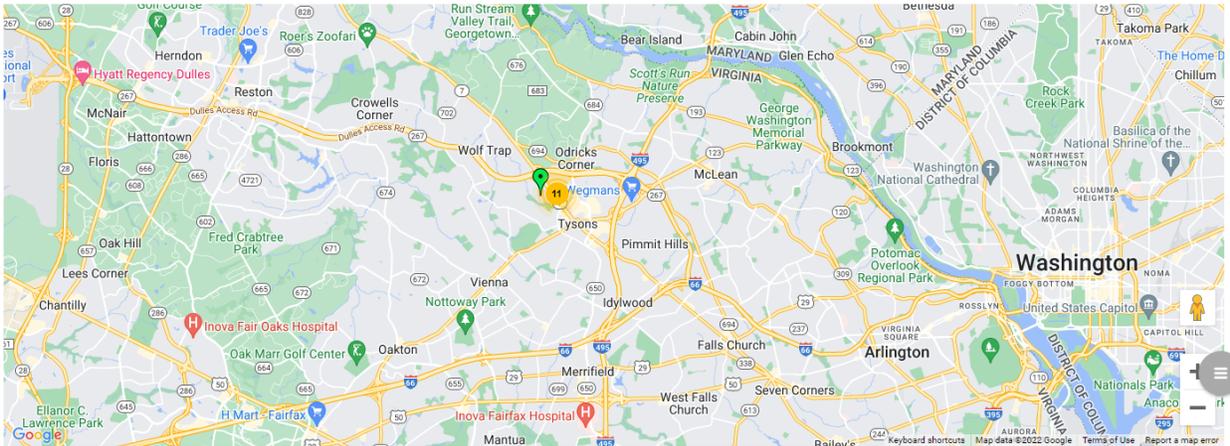
Navigation bar: Edit, Invitees, Questions, Attachments, Map, Briefing

Goal \$250,000	Raised \$0	Net -\$13,500	First Gift \$1,000 12/19/08
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4. A Google Map with the selected location will open. Click on the gray  button on the lower right side of your screen.

EV001-Announcement Dinner ?

Navigation bar: Edit, Invitees, Questions, Attachments, **Map**, Briefing



5. A box will appear asking you to select the criteria of the search:

- Range of search in miles
- CTD Greater Than/Equal To
- Highest Gift Greater Than/Equal To
- Last Gift Greater Than/Equal To
- Last Gift On/After
- Invited Status

Search Range (Miles)

1

CTD Greater Than/Equal To

Highest Gift Greater Than/Equal To

200

Last Gift Greater Than/Equal To

Last Gift On/After

Invited

All

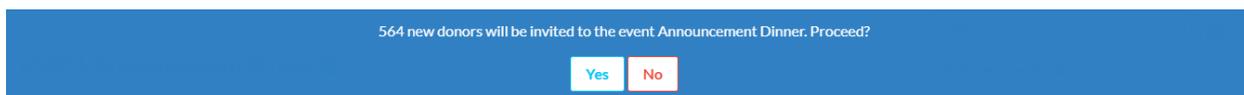
Clear Export Invite

4 records ?

6. Once you enter your criteria for the Radius Search, the total number of records that fit the parameters will appear.

7. Click on the blue **Export** button to download a CSV file with the information.

8. If you click on the blue **Invite** button, those donors will also be added to the event. A blue confirmation message will appear once they are added. Click **Yes** to confirm.

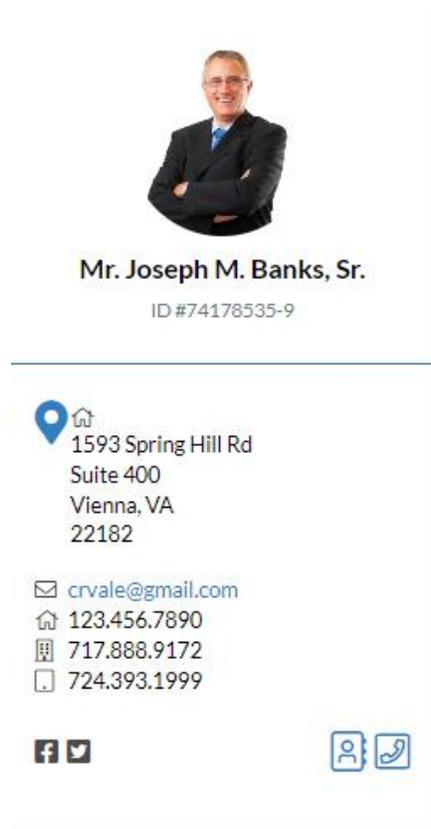


If all the donors have already been added to the event, a message in a red bar will prompt you to change the search filters.

Radius Search via People Records

1. From **People Search**, enter the name of the person's address you want to search around.

2. On the **People Profile**, click on the map icon  by the address.



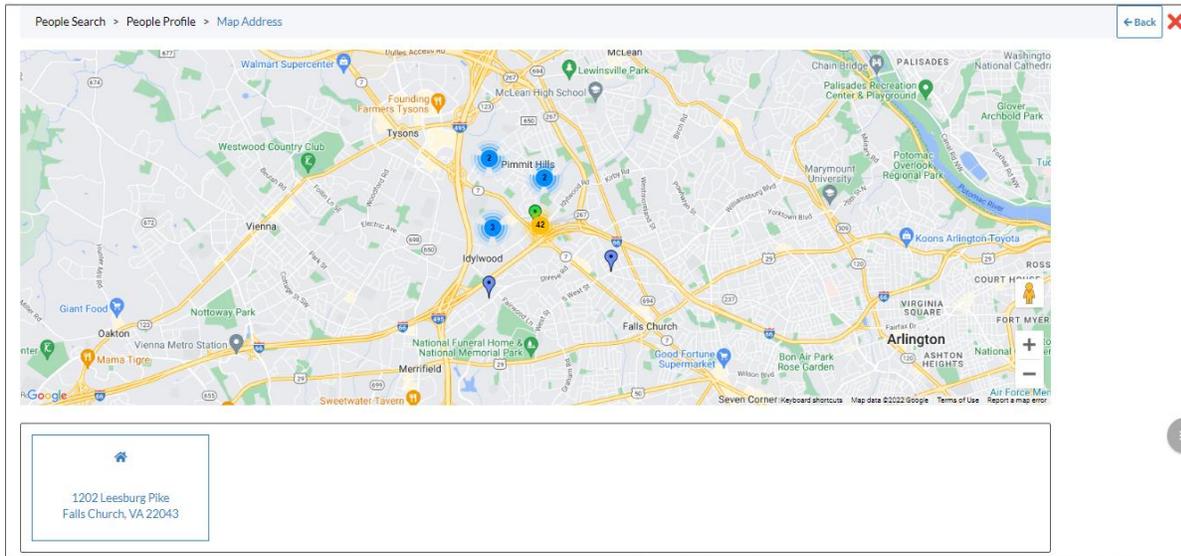

Mr. Joseph M. Banks, Sr.
ID #74178535-9

 
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Suite 400
Vienna, VA
22182

 crvale@gmail.com
 123.456.7890
 717.888.9172
 724.393.1999

3. A map of the location will open. Click on the gray  button on the lower right-side to open the **Radius Search**.



4. The filters for the **Radius Search** will open. Here, you can select:

- Range of search in miles
- CTD Greater Than/Equal To
- Highest Gift Greater Than/Equal To
- Last Gift Greater Than/Equal To
- Last Gift On/After

X

Search Range (Miles)

▼
25

CTD Greater Than/Equal To

Highest Gift Greater Than/Equal To

500

Last Gift Greater Than/Equal To

Last Gift On/After

📅

Clear
Export

5. Once the criteria is entered, click the blue Export button to download a CSV.

Note: the options for the Radius Search via the People Profile differ slightly than when the search is run through the Event dashboard.

6. Once you have exported the CSV file, open it in Excel.

7. You can take the additional step of adding a unique **Keyword** to the list. Simply add a column labeled **Keyword** and add the appropriate keyword to label your event. (For more information on Keywords, [click here.](#))

The screenshot shows an Excel spreadsheet with the following columns: A (miles), B (PID), C (Keyword), D (CHKDGT), E (FECCMTEID), F (PEOTYPE), G (PEOCODE), H (PEOCLASS), I (PREFIX), J (FNAME), K (MNAME), L (LNAME), M (SUFFIX), and N (FL). The 'Keyword' column (C) is highlighted with a red border. The data rows contain donor information, including names like JosephBanks25 through JosephBanks45, and various organizational names like 'Joint Fundraising Committee' and 'Washington Victory Committee'. The spreadsheet is titled 'NearbyAddressesExport'.

A	B	C	D	E	F	G	H	I	J	K	L	M	N
miles	PID	Keyword	CHKDGT	FECCMTEID	PEOTYPE	PEOCODE	PEOCLASS	PREFIX	FNAME	MNAME	LNAME	SUFFIX	FL
0.867243	74000685	JosephBanks25	9		Individual	Donor		Mr.	Barbara	J.	Lawrence		M
0.867243	74386170	JosephBanks26	2		Individual	Donor		Mr.	Halley		Barbour		M
0.867243	74386177	JosephBanks27	1		Individual	Donor		Mr.	Rick		Shelby		M
0.867243	74386178	JosephBanks28	0		Individual	Donor		Mr.	Alex		Castellanos		M
0.867243	74386179	JosephBanks29	9		Individual	Donor		Mr.	Ed		Goeas		M
2.328643	74135665	JosephBanks30	1		Individual	Donor			Bruce	R.	Siebrecht		Bi
2.690593	74090398	JosephBanks31	2		Individual	Donor			Barbara	Lynne	Follick		Bi
3.008277	74002612	JosephBanks32	7		Individual	Donor		Mrs.	Robin	M.	Stone		M
3.008277	74042038	JosephBanks33	9		Individual	Donor			Bonnie	S.	Grobe		Bi
3.008277	74047842	JosephBanks34	4		Individual	Donor			Bruce	R.	Clinton		Bi
3.008277	74063981	JosephBanks35	2		Individual	Donor			Beverly	Y.	Vlasak		Bi
3.008277	74085955	JosephBanks36	9		Individual	Donor			Amanda		Siedelmann		Bi
3.008277	74088926	JosephBanks37	7		Individual	Donor			Barbara	Louise	Kieffer		Bi
3.008277	74157582	JosephBanks38	5	C00000009	Joint Fundraising Committee	Donor					Washington Victory Committee		W
3.008277	74159532	JosephBanks39	2		Individual	Donor		Mr.	John		Plishka		M
3.008277	74161399	JosephBanks40	6		Individual	Donor			Beverly	A.	Vogt		Bi
3.008277	74165555	JosephBanks41	7		Individual	Donor			Alfred	J.	Justice		Al
3.008277	74177606	JosephBanks42	5		Individual	Donor			Barbara	K.	Radano		Bi
3.008277	74384922	JosephBanks43	4	C00000123	Multi-Candidate PAC	Donor					Special Interest Pac		Sp
4.010699	74178425	JosephBanks44	8	C00024968	Non Multi-Candidate PAC	Donor					American Optometric Association PAC		Al
4.11447	74128822	JosephBanks45	7		Individual	Donor			Brian	P.	Piccolo		Bi

8. Upload the CSV back to Crimson, and you can find the donors found in the **Radius Search** when you look up that **Keyword**.