

Flags are useful in organizing your **People** records and categorizing them in easily searchable groups. Crimson automatically creates a few common flags, but you can create flags as needed at any time.

Creating and Editing Flags

To create a new custom flag or view existing flags, go to **Settings** under the **Main Menu** and click **People** or you can access the **People Settings** in the **People Dashboard**. Under the **Flag** tab, a list of your existing flags will appear along with the total number of flags you have.

| | Flag | Keyword | Attribute | Action | Club | Club Status | Contact Flag | Event Status | People Code | Task Type |
|---|--------------------------------|--------------------|-------------------|------------------|----------|-------------|--------------|--------------|-------------|-----------|
| | Task Purpose | Event Invitee Type | Fundraiser Groups | Fundraiser Title | Template | | | | | |
| | Add ? | | | | | | | | | |
| | Search Code, Description, Note | | | | | | | | | |
| | Code | Description | Note | Top Flag | | | | | | |
|    | DNM | Do Not Mail | | ✓ | | | | | | |
|    | BAD | Bad Address | | | | | | | | |
|    | DNC | Do Not Call | | | | | | | | |
|    | CMDI | CMDI Demo Records | | | | | | | | |

- To search for certain flags, type search criteria into the **Search Bar**.
- To view and edit a flag, click the  button to the left of the flag for edit.
- To delete a flag, click the  button. A confirmation message will appear asking, “Are you sure to delete?” Click **Yes** to delete the flag permanently or **No** to cancel.

**Please note: You cannot delete a flag that is currently being used in Crimson. In order to delete any flags, you’ll have to confirm that it is not in use under any people records first.

- To create a new flag, click the  button and a new **Add Flag** window will appear.

- Enter a **Flag Code** of up to 10 characters that will help you remember its significance (Ex. “DNM” for Do Not Mail or “ONCEAYR” to Send Mail Only One Time per Year).
- Enter the full **Description** for the flag.
- Use the optional **Note** field to provide more details about the flag or directions for its use.
- Check the **Top Flag** checkbox to prioritize the flag to the top of the Flag Menu when applied to a People Record and establish the **Priority** for the Top Flag. For more information, please refer to the [How to Create Top Flags FAQ](#) on the HelpDesk.
- Check the **Channel Suppression Flag** checkbox and select at least one target channel (**Email**, **SMS**, **Phone**, or **Direct Mail**) if you want to apply this flag as a suppression flag when using the [Advanced Export by Channel](#) feature or when generating a **People Search**, **Thank You** list, or **Best Efforts**. For more information, please refer to the [How to Use Mass Flag Suppression in List Selects](#) on the HelpDesk.
- Click **Save Changes** when you have completed the **Flag Code**, **Description**, and **Note** fields.
- You may click **Cancel** at any time to exit the **Flag - Add** window and not save the flag.

Using Flags in a People Record

Within a **People** record, flag information is located in the **Flag & Keywords** panel. The panel will show up to five flags and the number of additional flags there are under the record.

- To view the list of existing flags, click on the **Flag & Keywords** panel, select the **Flags** tab in the panel summary to see **Available Flags** versus **Assigned Flags**. Under Assigned Flags, each flag's **Code** and **Description** will appear along with the date the flag was added to the record.
- To add a new flag to a record, select the flag from the **Available Flags** list and then click the right arrow. To remove a flag, select it from the **Assigned Flags** list and click the left arrow.

You can also use the **Mass Append** function to assign flags to multiple people records at once. For more information, please see the [Crimson: Mass Append - Flag, Keyword, Notes, Events, and Tasks](#) guide.

Searching with Flags

When searching for **People** records, you may search for all records with one or more flags under the **Group** section. You may also specify a date or range of dates for when the flags were added and search for records with a specific group of flags with the **Having All Flags** filter.

The screenshot displays a search filter interface for 'People' records. At the top, there are tabs for 'Profile', 'Contact', 'Group' (selected), 'Giving Summary', 'Gifts', 'Giving Aggregate', 'Giving Aggregate (Supp)', and 'Suppression'. Below the tabs is a grid of 15 filter panels, each with a title, a dropdown menu, and a search input field:

- Non-Donor**: Toggle switch.
- People Code**: 'Enter People Record Code', 'Choose a People Code' dropdown, search input.
- People Type**: 'Enter People Record Type', 'Choose a People Type' dropdown, search input.
- Top Flag**: Toggle switch.
- Flag**: 'In list of' dropdown, 'Search Flags' input.
- Flag Date**: '(Specify)' dropdown, search input.
- Having All Flags**: 'In list of' dropdown, 'Search Having All Flags' input.
- Keyword**: 'In list of' dropdown, 'Search Keywords' input.
- Having All Keywords**: 'In list of' dropdown, 'Search Having All Keywo' input.
- Event Code**: 'Starts with' dropdown, search input.
- Event Status**: 'Starts with' dropdown, search input.
- Event Start Date**: '(Specify)' dropdown, search input.
- Club**: 'Starts with' dropdown, search input.
- Club Status**: 'Starts with' dropdown, search input.
- Having All Clubs**: 'In list of' dropdown, search input.

At the bottom right, there are buttons: 'Save', 'Saved Searches', 'Recent Searches', 'Reset', and 'Run'.

You may also use flags to omit certain records when searching by entering those flags you wish to exclude under the **Suppression** section.

Profile
 Contact
 Group
 Giving Summary
 Gifts
 Giving Aggregate
 Giving Aggregate (Supp)
 Suppression

| | | | | |
|---|--|---|--|--|
| Apply Channel Suppression Flags <input type="checkbox"/> | Supp: Flag In list of <input type="text"/> Search Supp: Flags | Supp: Having All Flags In list of <input type="text"/> Search Supp: Having All F | Supp: Keyword In list of <input type="text"/> Search Supp: Keywords | Supp: Having All Keywords In list of <input type="text"/> Search Supp: Having All K |
| Supp: Event Code Starts with <input type="text"/> | Supp: Total # of Gifts Equal to <input type="text"/> | Supp: Cumulative Total Equal to <input type="text"/> | Supp: Inception Date First Gift (Specify) <input type="text"/> | Supp: Inception Gift First Gift Equal to <input type="text"/> |
| Supp: Most Recent Gift Date Last Gift Date (Specify) <input type="text"/> | Supp: Most Recent Gift Last Gift Equal to <input type="text"/> | Supp: Program Choose a Supp: Program <input type="text"/> | Supp: Attribute In list of <input type="text"/> Search Supp: Attributes | Supp: Having All Attribute Categories In list of <input type="text"/> Search Supp: Having All A |

For more detailed information on searching and on using the Suppression functionality, please see the [Crimson 3: People Search](#) guide on the HelpDesk.