crimson

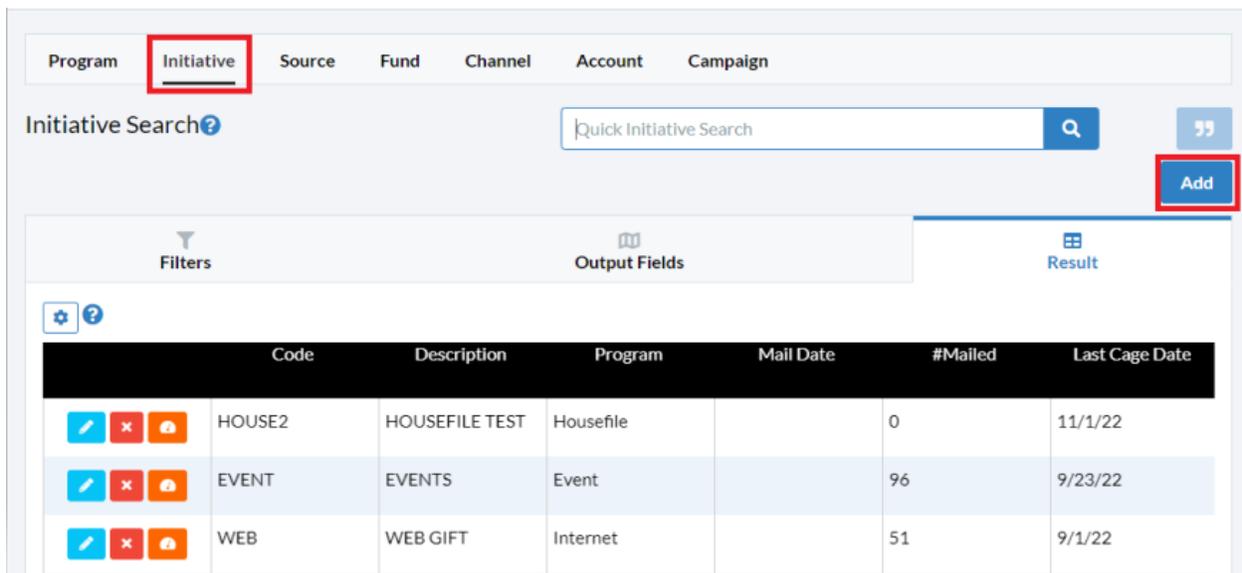**Crimson – Fundraising Codes – Source Code Creation and Import**

Every gift must be assigned to a **Source Code** for data entry and that Source Code must exist in Crimson before the gift can be entered. So, before you begin data entry or import gifts, you should first focus on entering your codes.

If you have not already, please take a minute to review the **Crimson: Fundraising Codes** guide on the HelpDesk for more information on fundraising codes. It will define several terms in this document.

Entering Source Codes One at a Time

If you have a single **Source Code**, or just a handful, it is easiest to enter them manually one at a time. Each **Source Code** must be linked to an **Initiative Code**, so begin by confirming which initiative will be linked or create a new one if necessary. **Each **Initiative Code** must also be linked to a **Program** so that all three codes are linked to one another.

1. To add a new **Initiative**, go to the **Fundraising Dashboard**, and click the **Settings** ⚙ button in the top right and the **Initiative** tab. From there you can search for an existing initiative or create a new one by clicking **Add**.

2. Enter the **Code** you want to use and then add a **Description**. Use the drop-down menu under the description to select the appropriate **Program**. You may also select an **Initiative Type, Sub-Program,** and enter a **Note**, but those fields are not required. Then click **Save**.

Add Initiative   ✖

Initiative Code

Description

Initiative Type

Both

Program

Note

3. A new Initiative window will appear with options. If you are entering a single source code and you would like to name it the same as the initiative code you just created, click on the **Create a Single Source Code** button that appears after you have created the new initiative. You can also **Edit Initiative** and **Import Source Codes**.

Initiative: Q123EVENTS - Quarter 1 2023 Events

Program: Event

Last Cage Date:
Gross: $0
Number of Gifts: 0

Edit Initiative   **Import Source Codes**   **Create Single Source Code**

Fundraising   **Source Codes**

First 90 Days

No data series to display. Select another date range.

4. Otherwise, you can begin adding Source codes by clicking the **Add Source** button under the **Source Codes** tab in the initiative window or you can go back to the **Fundraising Settings** section and click on the **Source** tab.

5. Creating a new source code is very similar to creating a new initiative, click **Add**, enter your **Code** and **Description** and select the linked **Initiative** from the drop-down menu. In this window you can also link to an event by entering an **Event Code** in the **Post $ to Event** field**.** Additionally, there is the option to place cost details, date, and quantities if you want to track mailing information for this **Source Code.** Then click **Save**.

Add Source Code

List # Group   List #

Code	Cost Details	Date	Quantity
	☐ Apply costs to all codes in initiative	☐ Apply mailed date to all codes in initiative	☐ This is a telemarketing code
Source Code	Production Cost per Mailed	Mailed date	Number Mailed
	$ 0	📅	0
Description	List Cost per Mailed		
	$ 0	First Cage:	Number of Gifts: 0
Initiative	Cost per Response	Last Cage:	Number of Donors: 0
Search Initiative...	$ 0		
Post $ to Event	Postage Cost per Mailed	Last Modified:	Response Rate: %
Search Events...	$ 0		
Create Event	One Time Flat Cost per Source		
	$ 0		
	Cost % of Raised (x Gross)		
	0 %		

6. To edit an existing source code, go to the **Source** tab and click the ✏️ button on the left-side of the source code. You will then have the ability to **Edit Source Code, Edit Budget,** and **Merge.**
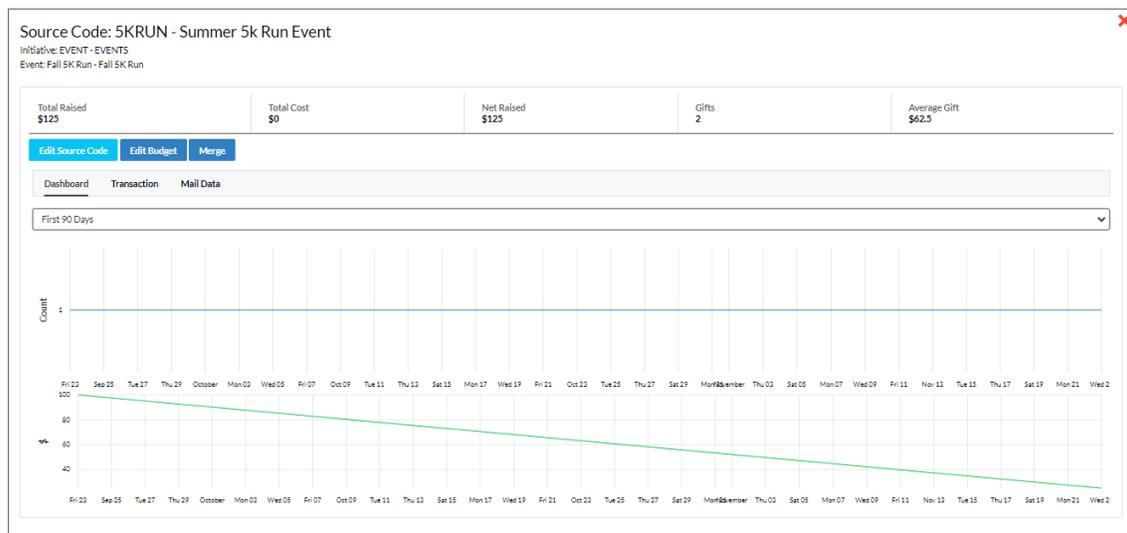
Importing Source Codes

Start by entering your source codes and descriptions into your import template. If you have not already, please download the **Source Code Import Template** (see attachment below) from the HelpDesk. The required fields are **Source Code** and **Source Description**. Confirm that the correct linked **Initiative** has already been entered into Crimson. If not, please follow the directions above for creating an initiative.

1. Be sure to only have a single **Source** worksheet in the excel file and delete any unnecessary worksheets.

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Code	Description 1	Description 2	Description 3	@	List#	Mail Date	# Mailed	Prod Cost	List Cost	Post Cost		
2	TST1601	Y2016	$5-$9.99	Direct Mail	A	1	1/15/2016	2545	0.215	0.150	0.340		
3	TST1602	Y2016	$10-$19.99	Direct Mail	A	1	1/15/2016	3232	0.215	0.150	0.340		
4	TST1603	Y2016	$20-$49.99	Direct Mail	A	1	1/15/2016	2224	0.215	0.150	0.340		
5	TST1604	Y2016	$50-$99.99	Direct Mail	A	1	1/15/2016	2344	0.215	0.150	0.340		
6	TST1605	Y2016	$100-$499.99	Direct Mail	A	2	1/15/2016	123	0.215	0.150	0.340		
7	TST1606	Y2016	$500-$999.99	Direct Mail	A	2	1/15/2016	100	0.215	0.150	0.340		
8	TST1607	Y2016	$1,000+	Direct Mail	A	2	1/15/2016	50	0.215	0.150	0.340		
9													
10													

SOURCE

2. Next, go to **Settings** from the ⚙ button on the **Fundraising Dashboard's Navigation Bar**. Click the ✏ button to open the **Initiative** that you want to link these source codes to. Click the **Import Source Codes** button within the Initiative's window.

- In **Step 1: Upload File**, click the ⬆ Choose a file or drag it here. button and select the file you want to import.

- In **Step 2: Mapping**, click the **Auto Mapping** or **Load Mapping** button to map the fields or manually match the columns in the file to those in the database.

- In **Step 3: Validate and Import**, click **Validate And Import** and either the source codes will be imported or a list of errors will appear for you to view. If you have errors, you will need to

correct the errors in the excel and then begin the upload process again with the updated worksheet.