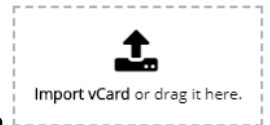


People Records – How to Add a New Contact or Donor

To add a new **People Record**, navigate to the **People Dashboard** and select the **Add a Record** action button. A **People Profile** editing screen will appear ready for entry.

Note: vCards or electronic business cards can be imported into a People Record by pressing the button.





Information can be entered for fields in the table that follows. Recommendations or tips for use of the various fields are available for your information.

Field	Description	Recommendations & Information
Type	Each record must have a type to identify the type of entity it is. Accurate people types make it possible to file reports correctly with the FEC and to monitor donor contribution limits.	To determine if a PAC is Multi-Candidate or Non Multi-Candidate, go to FEC.gov and search for the committee. "Qualified" indicates Multi-Candidate status.
FEC ID #	The FEC ID number for PACs, Campaign Committees or other organizations that file with the FEC can be recorded in this field and will appear on reports filed with the FEC by your committee.	If you don't know the FEC ID number, you can look it up. Click the FEC ID# Lookup Search bar, enter the organization's name, and then select the correct ID from the results.

Code	A code identifies the general record category based on the following options: Donor, Donor/Volunteer, Media, Non-Donor, or Volunteer. If a Non-Donor type or Volunteer record receives a contribution, Crimson will automatically change it to Donor or Donor/Volunteer.	Non-Donor is used for records that have not expressed interest in contributing or volunteering, but are useful as contacts. There is no harm in letting the default of Donor apply to all records entered. People Code gives you another option to segment records.
Prefix, First, Middle, Last, & Suffix	The name of each donor should be broken down into these searchable fields. Organization names should be entered in the Last Name field.	There is no drop-down menu with Prefix options like Mr., Mrs., Dr., etc. so that you have complete flexibility for military, religious, or any other supporter prefixes.
Spouse	This field can have first name for spouses with the same last name or first and last name when the last names are different.	
Biography	This field allows you to enter additional biographical information that may not be covered in any of the existing fields.	This info is not searchable on the People Search, but is available on the Full/Brief Profiles/Call Sheets.
Tracking #	A record for someone who is acting as a fundraising agent for the committee is given a tracking #. This number will be assigned to gifts from donors whose contributions should be attributed to this agent.	4 digit tracking numbers are typical, but not required. Assign a number and then click the blue button to validate if it is available or click the button to auto generate the next available #. CMDI recommends keeping a log of assigned tracking numbers.
Occupation & Employer	Occupation and Employer information entered will pull on reports filed with the FEC. If Retired, Homemaker or Student is entered for Occupation; the Employer field can be left blank. The donor will not be marked for "best efforts" and the blank field will be filled in automatically for the FEC report.	It isn't necessary to enter anything when info is missing. In fact, doing so makes it harder to follow up with the donor using Crimson's Best Efforts tool which helps create a list of donors missing this info. It can also add the "Information Requested" text for your FEC reports.
Formal & Informal Salutations	First names or nicknames (such as Bob for Robert) can go into the Informal Salutation field and more formal ways to address an individual (such as Captain Smith) can go into the Formal Salutation field.	Some committees consistently use formal salutations when contacting clients. For those few who they would like to address on a first name basis, the informal salutation is placed in the formal field.
Mail Salutation & Mail Name	Mail Salutation can be used to address a couple or family even though the record is for an individual (such as Capt. and Mrs. Smith). The Mail Name field may address a couple or family as well, but in a less formal manner (such as Bob and Ellen Smith).	

Primary Mail Record	You have the option of indicating a record as the Primary Mail record for that family or household.	For best results, use this field consistently and upon export of a list of records, check the Primary Mail column for this indicator.
DOB	The records Date of Birth.	
Title	A person's title within their organization can be recorded and later included on outputs. This field is not a replacement for Occupation which is included on FEC reports.	
Assistant, Phone, & Email Address	If someone is typically contacted through their assistant, that person's information can be recorded.	Some committees add Contacts for each person associated with a record instead of using the assistant field in order to add contact info (phone #, email, etc.)
Home, Cell, Work Phone, Fax, & Email	Contact information for the donor or volunteer can be recorded in the appropriate fields.	Phone numbers can be entered with or without punctuation. Once a record has been created, you'll have the option to add more numbers to the record in the Phone Book.
Facebook, Twitter, & URLs	You can enter the record's website, Facebook page, and Twitter page in these fields.	Clicking on any of the blue buttons on the left-side of the fields will open a new tab/window of that site.
Address Type	This field defaults to Home, but you can change it to Business, Seasonal, Contact or Other.	Once a record has been created, you'll have the option to add more addresses to it in the Address Book.
Find an Address	This field allows you to search for an address. As you begin typing the address, the drop-down will suggest matches. When you select one, the address fields will automatically fill in.	This search is similar to the Google Maps functionality.
Street & Additional Address Lines	Street should contain the main street address. The second two lines are typically used for apartment or suite numbers, building names or "in care of" information.	
City, State, Zip, & Plus4	These fields hold the City, State and full postal code information.	If not entered by a user, Crimson's address verification feature will update the Plus4 field.

- Click  once your Profile entry is complete or  to cancel.
- After saving, you'll be able to add additional information using the panels on donor page.

Note: See [People Records – Editing Records](#) on the HelpDesk for more information.