

Follow the directions below to update a People Record by either using the **Quick Search** tool or the detailed **People Search** to look up and open a People record.

Note: If you are unsure how to use the search option, please see the [Crimson: People Search](#) from the Helpdesk.

A **People** record has many sections that can be updated.

Edit Most Fields

Click the  button at the bottom left of the screen.

People
Mr. Joseph M. Banks, Sr. (PID: 74178535) ?

Profile

Type: Individual
Code: Donor
Assign Fundraiser: Select Gift Officer(s)
Chapter: 2200 - Mid-Atlantic - DC, MD, VA
Industry: [Dropdown]
Prefix: Mr.
First Name: Joseph
Middle Name: M.
Last Name or Company/Organization: Banks

Tracking#: 3018
Lobbyist: [Toggle Off] Link User Account: [Toggle Off]
Occupation: CEO
Employer: Joseph Banks
Formal Salutation: Mr. Banks
Informal Salutation: Joe
Mail Salutation: Mr. & Mrs. Banks
Mail Name: Joe and Ellen
Primary Mail Record: [Toggle On]
DOB: 1/1/1969

Contact

Home Phone: (123) 456-7890
Cell Phone: (724) 393-1999
Work Phone: (717) 888-9172
Fax: 404.393.7654
Email Address: crvale@gmail.com
Website: www.cmdi.com
Facebook: https://www.facebook.com/cmdl.cr
Twitter: https://twitter.com/CrimsonCRM
Assistant Phone: (###) ###-####
Assistant Email Address: [Field]

Address Type: Home
Find an Address: Enter a location
Street: 1593 Spring Hill Rd
Suite 400
Additional Address Line: [Field]
City: Vienna
State / Zip / Plus4: VA 22182

Cancel Save

The majority of fields will be open in a fully editable format, as displayed above. When you have made all appropriate changes, click the  button at the bottom of the screen. Click the  button and any edits you've made will be undone without saving. You can exit the screen by clicking on the X in the top right-hand corner.

Phone and Address Book

Additional addresses, phone numbers and email information can be entered by clicking on the icons in the bottom right of the first panel. You can choose either the  or the  in order to **Add**, **Edit** or **Delete** an entry. You'll also be able to indicate which address or phone number is considered the Primary. The Primary record appears on the main donor screen and is included in outputs – including the FEC output where relevant.

Picture

The **Photo** box in the top left hand corner of the screen allows you to view a photo attached to a record, add a photo if none exists or change the current photo. Put your cursor on the photo and click **Change** to locate a photo on your computer and load it.

There are additional modules and fields accessible through the various panels on the top half of the record. If you click on a panel, a panel summary will appear on the bottom half of the record.

Gifts

The **Gifts** panel shows a list of the donor's gifts to date. Click  in the panel or  in the panel summary to create a new gift, or highlight a gift in the **Recent Gifts** list by clicking it once to open it for viewing and editing.

The **Statement** option in the top right of the panel summary changes the viewing format of the list to display the full gift history, including adjustments.

Pledges

The **Pledges** panel allows you to monitor the statuses of any pledges the donor has made. The pledges will appear on a **Recent Pledges** list. To view all pledges, click **All** in the top right of the panel summary.

Click  in the panel or  in the panel summary to create a new pledge, or highlight a pledge by clicking the blue icon to open it for viewing and editing. You can also click the red X to clear it

from Crimson. More information about pledges can be found in the **Crimson: About Pledges** solution in the HelpDesk.

Giving History

All-Time Total
\$995,148
1,642 gifts

Soft Credits
\$5,030
2 gifts

Pledges
\$0
YTD

Consecutive Gifts
6 cycles
Donor since cycle 2008

Recent Gifts | All | Statement | Mail History | Add Gift

- MID 461646 • #1255 • 1/2/21 • \$500 • CH
C-PAC • Housefile • MISC1 • N/A
- MID 538178 • #1004 • 7/14/20 • \$1,000 • CH
G2020 • Housefile • 0001 • N/A
- MID 538000 • #1240 • 5/26/20 • \$2,479 • WR
P2020 • Event1 • CS • N/A
- MID 538007 • #1240 • 5/26/20 • \$2,486 • WR
P2020 • Event1 • CS • N/A
- MID 535509 • #1240 • 5/26/20 • \$303.43 • WR
P2020 • Event1 • CS • N/A
- MID 535510 • #1240 • 5/26/20 • \$185.07 • WR
P2020 • Event1 • CS • N/A
- MID 535517 • #1240 • 5/26/20 • \$6 • WR
P2020 • Event1 • CS • N/A
- MID 535518 • #1240 • 5/26/20 • \$7 • WR
P2020 • Event1 • CS • N/A
- MID 537976 • #1240 • 5/26/20 • \$2,455 • WR
P2020 • Event1 • CS • N/A

\$14,698.41
Total Raised (YTD) | 79 gifts

\$995148.01
Total Raised (CTD) | 1642 Gifts

RVC1	\$0	(\$200000 Remaining)
RV	\$0	(Maxed)
P2022	\$5329.1	(Maxed)
P2020	\$787787.5	(Maxed)
P2018	\$32300	(Maxed)
G2022	\$9369.31	(Maxed)
G2020	\$2200	(Maxed)

\$8785.01 Spouse: Ms. Ellen Banks
Total Raised (CTD) | 18 Gifts

P2020	\$50	(\$2750 Remaining)
P2018	\$1150	(\$1550 Remaining)
G2020	\$1200	(Maxed)
G2018	\$1050	(\$1650 Remaining)
C-PAC	\$	(\$5000 Remaining)

Giving Overview

Flags

The **Flags & Keywords** panel displays a list of flags attached to the record, and controls to manage flags. To add a new flag, click the desired flag in the **Available Flags** list in the panel summary and then click the right facing arrow. You can remove a flag in a similar manner by selecting the desired flag in the **Assigned Flags** panel summary and then click the left facing arrow.

Codes

Flags | Keywords | Attributes

Available Flags

Search available flags...

- DNM** Do Not Mail ☆
- BAD** Bad Address (7/29/11)
- DNC** Do Not Call (7/29/11)
- MMMMMMMMMM** ms
- MMMMMMMMMMT** TESTS

Assigned Flags

Search assigned flags...

- CMDI** CMDI Demo Records (6/3/22)

Keywords

The **Flags & Keywords** panel displays a list of keywords attached to the record, and controls to manage keywords. To select Keywords, click the **Keywords** tab. To add a new keyword, click the desired keyword in the **Available Keywords** list in the panel summary and then click the right facing arrow. You

can remove a keyword in a similar manner by selecting the desired keyword in the **Assigned Keywords** panel summary and then click the left facing arrow.

Codes

Flags **Keywords** Attributes

Available Keywords

Search available keywords...

- Data: Master Prospect List (4/18/22)
- Donor: Prospect: SB: Shilling (4/18/22)
- Email: Tuttle (4/18/22)
- Event: War Room20: Invite (4/18/22)
- Space_Test Space_Test (9/23/20)
- ...

Assigned Keywords

Search assigned keywords...

- DOOR TO DOOR (9/17/13)
- Adamlst Adamlst (3/28/18)
- b v bv b v bv (12/7/20)
- bc xvnfdbn bc xvnfdbn (12/2/20)
- COUNTY FAIR (9/17/13)
- ...

Codes

Flags Keywords **Attributes**

Available Attributes

Search available attributes...

- Volunteer General
- Volunteer Student
- Volunteer Administrative
- Volunteer Other
- Prospect Donor
- ...

Assigned Attributes

Search assigned attributes...

- Volunteer Event (4/6/20)

Recent Include Inactive [All](#)

- Volunteer - 4/6/20 - Present
Event

Note: Please reference [Crimson: About Flags](#) and [Crimson: About Keywords](#) in the Helpdesk to learn how to create new flags and keywords in the library.

Tasks

The **Task** panel displays a list of all the tasks to which the donor has been linked, with the same **Add**, **Open**, and **Delete** options. Click the checkbox marked **Include Completed** to change the view from pending tasks only to all tasks. See the **Crimson: About Tasks** HelpDesk file for more instruction on using tasks.

Tasks								
Done	Due	For	By	Type	Purpose	Priority	Subject	<input type="checkbox"/> Include Completed
		8/16/22	Rachel Bryant	Seth Fangman	To Do	Initial Contact	Low	TEST Assign a task
		12/31/20	Jack Blakely	Jack Blakely	Call	Follow up	Med	follow
		12/25/20	Jack Blakely	Jack Blakely	Call	Follow up	Med	follow up
		10/31/20	Sofia Amaya	Sofia Amaya	To Do	Follow up	High	Make ask at local e
		9/19/20	Junho Bae	Junho Bae	Call	Follow up	Med	Follow-up call
		7/18/19	Lydia L Siu	Lydia L Siu	To Do	Initial Contact	Med	Test Task
		6/26/19	g test3	Jack Blakely	Call	Initial Contact	Low	Call list 6-26 local t
		6/26/19	g test3	Jack Blakely	Call	Initial Contact	Low	Call list 6-26 local t
		5/31/19	Devesh Khare	Jack Blakely	Call	Follow up	High	Follow up on event
		3/29/19	Andrew Quinlan	Andrew Quinlan	Call	Follow up	Med	Call

Notes

The **Note** panel displays a list of notes about the donor. You can add, open, and delete notes as with pledges and gifts. Each note can have a subject, date, and note text body.

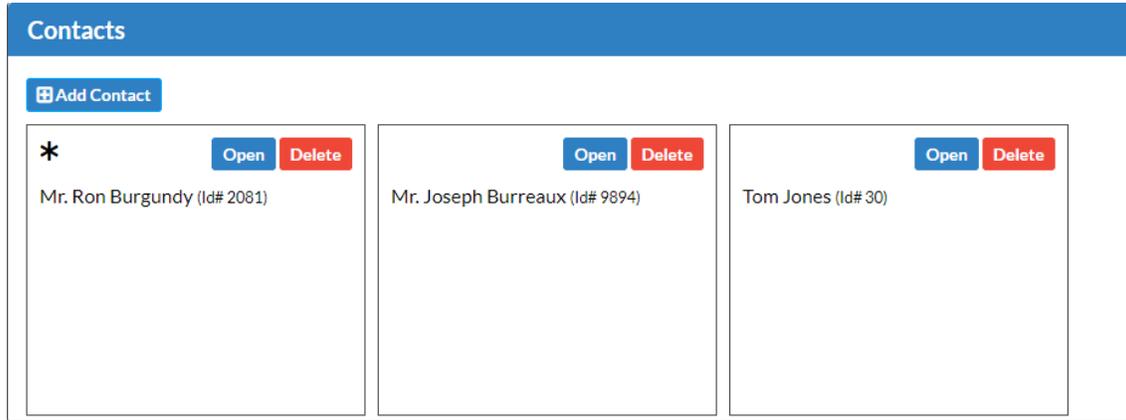
Events

The **Events** panel displays a list of all the events to which the donor has been linked, with the same **Add**, **Open**, and **Delete** options. See the [Crimson: Events Features](#) helpdesk file for more instruction on using events.

Events	
Add To Event	
All-Time Total	By Year
\$28,785 ²⁷	\$3,010 ³
	YTD
	\$6,200 ⁵
	Last Year
	\$3,000 ¹
	\$9,200 ¹¹
	Two Years Ago
	\$150 ¹
	By Fund
\$13,650 ¹⁵	\$500 ¹
P2020	G2020
\$6,000 ³	
C-PAC	
\$5,900 ⁵	
P2022	
	Recent Events All
	<ul style="list-style-type: none"> 10/25/22-ev11111-test event-Invited \$100 - rTripleMatch 8/15/22-EV2001-Dinner Fundraiser-Invited \$0 12/3/21-1221Event-December Event-Invited \$100 - 1221EventSource 8/5/21-08Dinner-August Dinner-Invited \$7,100 - A15PC999 7/31/21-BNTEST-Brooke Taylor test-Invited \$2,900 - TESTBT2021 3/10/21-eventpledges-Event-Invited \$500 - rTripleMatch

Contacts

The **Contacts** panel allows you to add contacts to a record, such as assistants who should be listed as the primary contact information, or contact people for a PAC. Click **Add Contact** to create a new contact, and a Contact window with fields for information like address, email, and phone number will appear for editing. Click the checkbox marked Primary once to make that contact the primary contact for the record.



History

The **History** panel shows an itemized list of every change that has been made to the People file in Crimson since its creation. You can select a particular time period in the Period drop-down menu, select what kind of changes you would like to see (**Delete, Insert, Update, or All**) from the **Update Type** drop-down menu, or use the search bar. This feature allows you to view who made what updates when, and may help to understand new information, or allow you to make inquiries about changes to the Crimson users who made them.

