



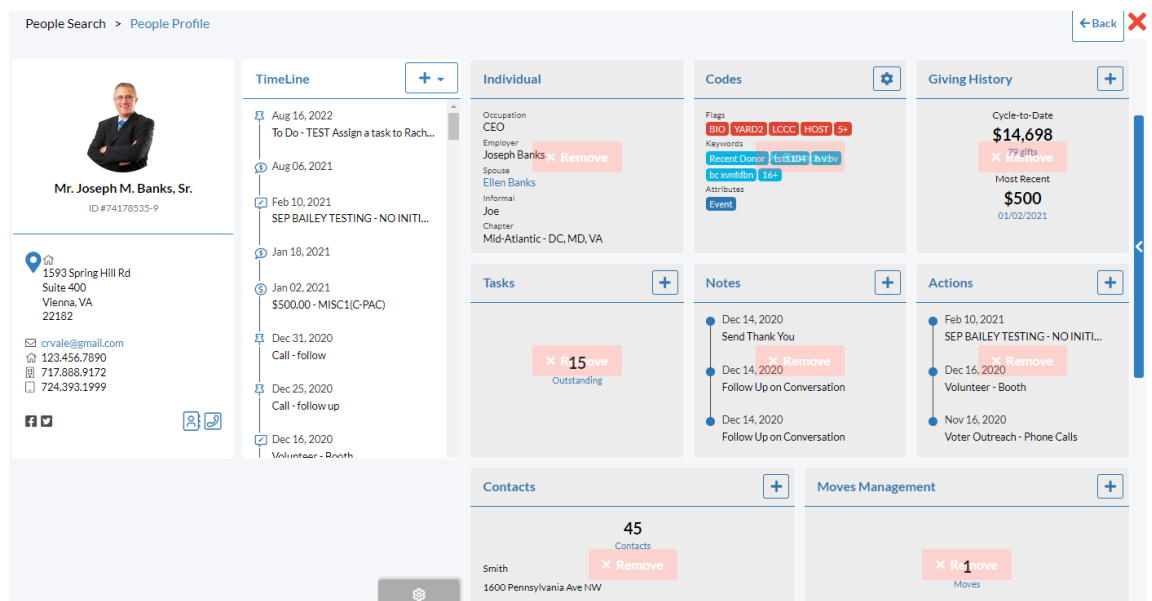
With this customization tool, you can add, remove, or move **Panels** on the **People Profile**. This will allow you to tailor your People Profile view to your needs. These custom settings will be saved to your user account, and will be applied to the unique database you save them in.

Customizing People Profile

- To start editing People Profile, hover over the  customization icon at the bottom of the screen.



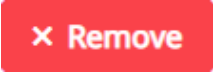

- Click the blue icon that appears below .
- This will enable customization mode. Hover over the Profile Panels prompting you to Remove, Add, or Move them.

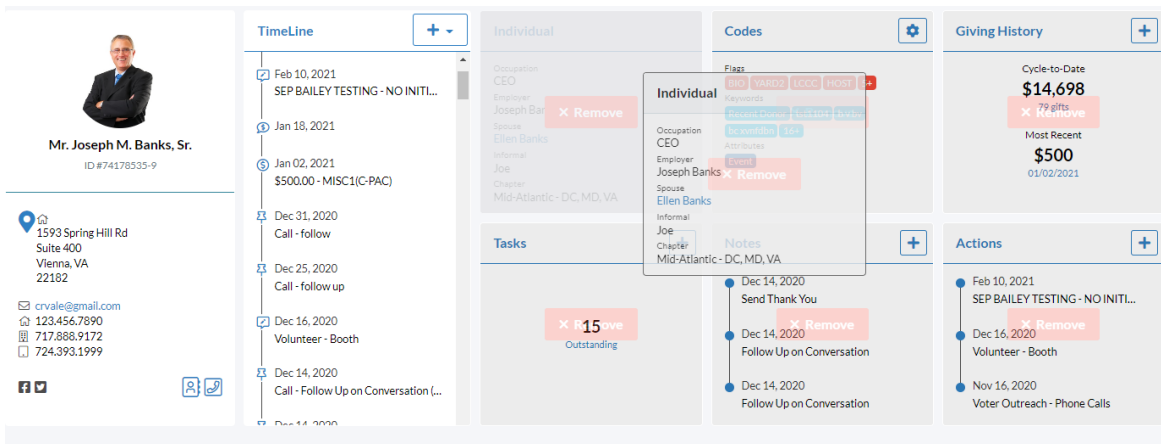


The screenshot displays the 'People Profile' page for Mr. Joseph M. Banks, Sr. (ID #74178535-9). The interface is organized into several panels:



- TimeLine:** A vertical list of events including 'To Do - TEST Assign a task to Rach...', 'SEP BAILEY TESTING - NO INITL...', and 'Volunteer - Booth'.
- Individual:** Personal information such as 'Occupation: CEO', 'Employer: Joseph Banks', and 'Spouse: Ellen Banks'.
- Codes:** A list of codes and attributes like 'BIG', 'YARD2', 'LCCC', 'HOST', 'Recent Donor', and 'Event'.
- Giving History:** Financial data showing 'Cycle-to-Date \$14,698' and 'Most Recent \$500'.
- Tasks:** A list of tasks, one of which is 'Outstanding' with a 'Remove' button.
- Notes:** A list of notes including 'Send Thank You' and 'Follow Up on Conversation'.
- Actions:** A list of actions such as 'SEP BAILEY TESTING - NO INITL...', 'Volunteer - Booth', and 'Voter Outreach - Phone Calls'.
- Contacts:** A summary showing '45 Contacts' and a 'Remove' button.
- Moves Management:** A section for managing moves, showing '1 Move' and a 'Remove' button.

A gear icon is located at the bottom center of the interface, used for customizing the profile layout.

- **Remove** – Click  to remove an item from the dashboard view
- **Add** – Click  to add an item to the dashboard view.
- **Move** – To move panels locations in the Profile View, simply click and drag a panel to a new spot in the list.



The screenshot displays the Crimson People Profile interface for Mr. Joseph M. Banks, Sr. (ID #74178535-9). The profile includes contact information, a timeline of events, and several customizable panels. A customization overlay is active, showing a grid of panels with 'Remove' and 'Move' buttons. The panels shown in the overlay include: Individual (Occupation: CEO, Employer: Joseph Banks, Spouse: Eileen Banks, Informal: Joe, Chapter: Mid-Atlantic - DC, MD, VA), Codes (Flags: BIO, YARD, LCCP, HOST), Giving History (Cycle-to-Date: \$14,698, Most Recent: \$500), Tasks (15 Outstanding), Notes (Dec 14, 2020: Send Thank You, Follow Up on Conversation), and Actions (Feb 10, 2021: SEP BAILEY TESTING - NO INITI..., Dec 16, 2020: Volunteer - Booth, Nov 16, 2020: Voter Outreach - Phone Calls).

- Once you have made your changes, click the  button in the customization icon to save your changes or  to cancel.