

There are several new features and functionalities in Crimson's **Events Module** that allow users to manage their events and invitees easier as well as complete tasks at the actual event such as process credit cards and check invitees in.

To learn more about the **Event Dashboard**, see the [Crimson – Event Dashboard](#) guide on our HelpDesk. Also, to learn more about the new search features and quick searches, see the [Crimson – New Search Features](#) and [Crimson – Quick Searches](#) guides on our HelpDesk.

Edit Event

- Once you have opened an existing event via the **Event Search** or the **Event Dashboard**, you can view and edit the event's details under the **Edit** tab. Please note, the 3 required fields for events are **Event Code**, **Description**, and **Start Date**.
- In order to have the summary information in the top blue bar be calculated for an event such as **Goal**, **Raised**, **Net**, **First Gift**, **Last Gift**, and **Outstanding Pledges**, at least one **Source Code** needs to be linked to the event.
- To add and link a new source code to an event, click the  button. If you want to link an existing source code to this event, you'll want to go to **Money Settings** to do that.

EV001-Announcement Dinner 

Edit Invitees Questions Attachments Map Briefing

Link Existing Source Code + Add Source Code

Goal \$250,000	Raised \$0	Net -\$13,500	First Gift \$1,000 12/19/08	Last Gift \$1,250 5/1/20	Outstanding Pledges \$0
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Code
EV001

Description
Announcement Dinner

Start Date
8/3/2012

Start Time
9:00 AM

Multiple Days?

End Date
8/22/2012

Find an Address
Enter a location

Street
1593 SPRING HILL ROAD, SUITE 400, CMDI

City
Tysons Corner

State
VA

Zip
22182

Goal \$
250000

Cost \$
13500

Fund
G2022

Comment
NOTES

Venue
Hyatt Hotel

Staff Lead
John P

Save

Ticketing

- When you check the **Enable Ticketing** checkbox in the **Edit** tab, you can then create different **Ticket Descriptions** with **Participation Levels** or amounts by clicking the  button.

Ticket Description	Participation Level	
VIP	\$1,000	
General	\$100	
		

- Once you have created tickets, they can then be assigned to **Invitees** when you **Process \$** so that the number of tickets per attendee can be tracked. The number of tickets an attendee has been assigned can be viewed in the record's **Edit Event Participation** page. Please note, that tickets can be assigned under **Process \$** whether the donor decides to **Pay Now (CC)** or **Pay Later (Pledge)**.

Edit Event Participation

11018Sofia Test 11018Borden (74492288) 8/3/12 - EV001 - Announcement Dinner

Edit Questions Payments Pledges Guests

1 General Admission ticket **Process \$** **Check In**

Status: Invited

RSVP: 

Comment:

Table #:

Invitee Type:

Invitees

EV001-Announcement Dinner 

Edit **Invitees** Questions Attachments Map Briefing

Change Status: Check In: Search Invitees and Guests:

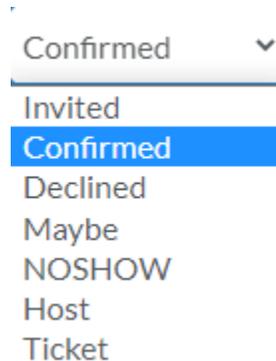
Update Selected

Status: Type: Checked In: CTD Greater Than/Equal To:

Hide Filters

			PTID	RSVP On	Updated On	Status	Type	Name	Address
<input type="checkbox"/>		Check In	0		3/12/19	Guest of George A		fff	
<input type="checkbox"/>	  	Process \$	74492288		3/12/19	Invited		11018Borden, 11018Sofia Test	998E You Street Groveland, FL 347
<input type="checkbox"/>	  	Process \$	74489964		3/12/19	NOSHOW		A. George	8104 Buckspark Ln Potomac, MD 208
<input type="checkbox"/>	  	Process \$	74002866		7/20/18		VIP	Adalene (Mrs) Yvette M	366 Shore Road Cr

- In order to help you manage your invitees easier, a mass update functionality has been added where you can **Change Status** or **Check In** multiple invitees instead of having to update their information one at a time. You need to check the checkboxes for each invitee you want to update or you can check the checkbox at the left corner of the black header section to select all invitees and then click the **Update Selected** button.
- Use the **Quick Search** bar in the **Invitees** section or the **Status, Type, Checked In, or CTD Greater Than/Equal To** search filters to find particular invitees or guests.
- Click the  button to edit the record's **Event Participation** for this particular event, click the  button to open the invitee's people record, or click the  button to remove the invitee from the event.
- Click the  button to process a credit card for the invitee now or create a pledge for the invitee for this event. For more information about the **Process \$** feature in **Events**, please see below. Click the  button to mark the invitee as checked in to the event.
- To quickly update an invitee's **Status**, open the drop-down menu and select the new status from the available options. Once selected, that invitee's status will automatically be updated.



To learn more about the Events' Mobile Version, see the [Crimson – Events Mobile Version](#) guide on our HelpDesk.

Process \$

- When you click the  button, you can view summary details for the invitee, contact information, the **Ticketing** options, and the option for the invitee to **Pay Now (CC)** or **Pay Later (Pledge)**.
- Under the summary details for the invitee, you will be able to see if the invitee already has any tickets assigned to them for this event.

- When you use the **Ticketing** feature, it will automatically calculate the **Amount** according to the number of tickets you choose to purchase, but you can manually change that amount if the invitee chooses to donate on top of their ticket purchases. Please note, that tickets can be assigned under **Process \$** whether the donor decides to **Pay Now (CC)** or **Pay Later (Pledge)**.
- Once you've completed the fields in the **Pay Now (CC)** section and checked the **Disclaimer** checkbox, click the **Enter Payment** button to enter the credit card information and process the payment.

Donation for Event: [EV001 - Announcement Dinner](#)



George A
 PID: 74489964
 Retired at Retired
 CTD: \$0

8104 Buckspark Ln. East Potomac, MD 20854
 301-299-2680
 gcokinos72@yahoo.com

Ticketing

<div style="background-color: #0070c0; color: white; padding: 2px; text-align: center; font-weight: bold;">General Admission \$1,000</div> <div style="display: flex; justify-content: space-between; align-items: center; padding: 5px;"> - <input style="width: 40px; text-align: center;" type="text" value="0"/> + Total: \$0 </div>	<div style="background-color: #0070c0; color: white; padding: 2px; text-align: center; font-weight: bold;">VIP \$5,000</div> <div style="display: flex; justify-content: space-between; align-items: center; padding: 5px;"> - <input style="width: 40px; text-align: center;" type="text" value="0"/> + Total: \$0 </div>
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Pay Now (CC)

Amount \$

Fund Code

Source Code

Track#

Comment

Pay Later (Pledge)

Disclaimer Edit

I affirm that the donor has been notified of the following and has authorized this permissible credit card charge.

- Contributions are not tax deductible as charitable contributions for federal income tax purposes.
- Contributions from corporations, labor unions, foreign nationals (without a green card) and government contractors are prohibited.
- Contributions must be made from personal funds and cannot be reimbursed by another.
- Federal law requires us to obtain and report the name, mailing address, occupation and name of employer for each individual whose contributions aggregate in excess of \$200 per election cycle.

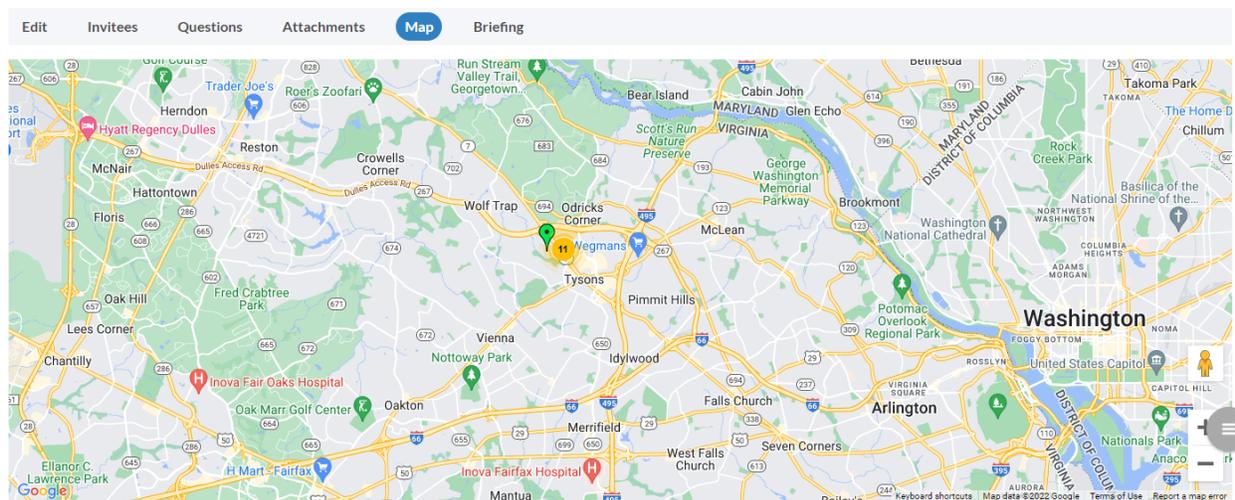
Fund	Total	Remain
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- If the invitee chooses to pledge instead, select **Pay Later (Pledge)**, complete the pledge fields and click the **Save** button.

Pay Now (CC)		Pay Later (Pledge)	
Pledge Amount \$ <input type="text"/>	Club <input type="text"/>	Received In-House Date <input type="text"/>	Tracking Track# <input type="text"/>
Pledge Date 12/7/2022	Comment <input type="text"/>	Amount \$ <input type="text"/>	Amount \$ <input type="text"/>
Expect Date <input type="text"/>	Move <input type="text"/>	+ Add Fundraiser	
Fund Code <input type="text"/>	Move Life Cycle Stage <input type="text"/>	Balance 0	
Source Code <input type="text"/>			
5KRUN EV002			

Radius Search

EV001-Announcement Dinner [?](#)



- Within the **Map** tab, on the bottom right side of the map, is a **Radius Search** feature that allows you to search for **People Records** within up to 50 miles from the Event's location. You can filter by CTD Amount, Highest Gift Amount, Last Gift Amount, Last Gift Date, and/or Invite Type.
- The results of your search will populate the map. Once complete, you can then either export your results to an Excel by clicking [Export](#) or invite these records to your event by clicking [Invite](#).

Briefing

- An **Event Briefing** can be created directly in Crimson and printed when needed. It includes the event's main details, **Contacts**, a **Timeline**, **Content** along with an image, and an **Invitees List**. The records listed in the **Invitees List** can be filtered to only show specific people.
- Please see the additional attachment for an example of an **Event Briefing** PDF.