

Moves Management will help guide fundraising staff through the giving cycle of taking someone from being a prospect, to a major donor. It utilizes features you already know and love in Crimson, such as Tasks and Notes, while incorporating a whole new dashboard and exciting layout!

Once you assign a Move to a People Record, you can move the donor/prospect between life cycle stages, for example from Discovery to Completion while tracking any interactions you have with the prospective donor along the way.

Moves Management Dashboard

The screenshot shows the Moves Management Dashboard with the following data:

Stage	Records	Total Amount
1. Discovery	6	\$56,750
2. Cultivation	5	\$25,000
3. Engage	4	\$79,000
4. Stewardship	5	\$100,600
5. Complete	5	\$30,500

Individual move cards include details such as donor name, status (e.g., Not Specified, Major Donor, Prospect Donor), proposed amount, MRC, and dates. Some cards also show task counts and completion dates.

Access the dashboard from the **More** section of the Crimson main left side menu. Then navigate the Moves Dashboard top bar. You can view Moves in two different layout options:

- **Dashboard View** – Here you can see a visual layout of every People Record that is in your Moves Management Cycle. You can quickly view summary details for each Move in card format. See how many Tasks are assigned for follow-up, follow-up on past due moves, and quickly drag and drop Moves from one Stage to another to track accurate changes as they occur.
- **List View** – Here you can view all Moves for the cycle in list format. The summarized view also allows you to make quick updates to each Move.

Dashboard View

Moves Management Dashboard

+ 🔍 Quick People Search ⚙️

1. Discovery 2. Cultivation 3. Engage 4. Stewardship 5. Complete

1. Discovery	2. Cultivation	3. Engage	4. Stewardship	5. Complete
6 Records \$56,750	5 Records \$25,000	4 Records \$79,000	5 Records \$100,600	5 Records \$30,500
Dey (Mrs.), June An... Not Specified Proposed: \$10,000 MRC: \$5,000 (3/10/20) 3/11/23	Banks (Mr.), Joseph Not Specified Proposed: \$5,000 MRC: \$100 (8/12/22) 11/30/22	Banks (Mr.), Joseph... Major Donor Proposed: \$10,000 MRC: \$100 (8/20/21) 2/4/23	Anderson, Ron Prospect Donor Proposed: \$50,000 MRC: \$500 (7/9/20) 3/31/22	Banks (Mr.), Joseph Major Donor Accepted: \$10,000 MRC: \$100 (8/12/22)
CMDI Mei (Mr.), Renjie M... Not Specified Proposed: \$10,000 MRC: \$10 (6/22/22) 4/15/23	Carothers, Clyde Major Donor Proposed: \$5,000 MRC: \$20 (1/28/14) 4/29/23	CMDI CMDI, Endorsement Proposed: \$10,000 MRC: () 1/28/23	Banks (Mr.), Joseph... Major Donor Proposed: \$5,600 MRC: \$500 (1/2/21) 1/14/23	Gain PAC, PAC Proposed: \$5,000 MRC: \$1,000 (4/27/18)
Siu (Ms.), Lydia Major Donor Proposed: \$10,000 MRC: \$10 (9/30/22) 3/18/23	Dey (Mrs.), June An... Not Specified Proposed: \$5,000 MRC: \$5,000 (3/10/20) 3/4/23	Jenkins, David Major Donor Accepted: \$50,000 MRC: \$50,000 (9/1/19) 2/18/23	Doerter, Michele Ma... Major Donor Proposed: \$7,000 MRC: () 1/4/23	Siu (Ms.), Lydia Midsize Donor Proposed: \$3,000 MRC: \$10 (9/30/22) Proposal Won
Smith, Matt Major Donor Proposed: \$5,000	Smith, John Midsize Donor Proposed: \$5,000	Lee, Matt Prospect Donor Proposed: \$9,000	Siu (Ms.), Lydia M. Midsize Donor Proposed: \$30,000	Thomas, Iris Major Donor Accepted: \$10,000

Dashboard View shows the **People Records** and their **Moves** laid out in columns based on the lifecycle **Stages** established in **People Settings**.

- Select, or unselect, the stages to view on the screen. For example, unselected Stage 4 by clicking on it.

Moves Management Dashboard

+ 🔍 Quick People Search ⚙️

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- Each blue header identifies the stage each record is currently in, the total prospective donations and the number of moves in that stage.

1. Discovery	2. Cultivation	3. Engage	4. Stewardship	5. Complete
6 Records \$56,750	5 Records \$25,000	4 Records \$79,000	5 Records \$100,600	5 Records \$30,500

- Quick Search**, located in the upper right side of the screen, allows you to quickly find a **People Record** in the cycle by Name or PID.

▼ Joseph Banks ✕ 🔍 ?

- Click  to view the full Moves Search filter options available. These enable the user to filter through the current list based on a variety of factors.
- Click  to add a new **Move** (see more on adding below).
- Drag and Drop the Panel boxes into new columns to quickly change the **Move's** stage.

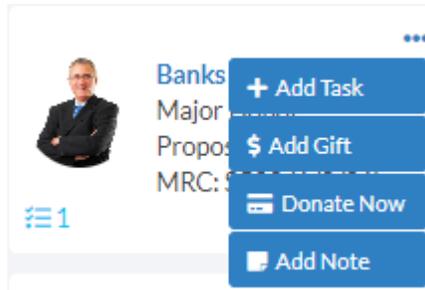
4. Stewardship ✕	5. Complete ✕
5 Records \$100,600	5 Records \$30,500
 <p>Anderson, Ron Prospect Donor Proposed: \$50,000 MRC: \$500 (7/9/20)</p> <p>☰ 0 🔴 3/31/22</p>	 <p>Banks (Mr.), Joseph Major Donor Accepted: \$10,000 MRC: \$100 (8/12/22)</p> <p>☰ 1</p>
 <p>Banks (Mr.), Joseph... Major Donor Proposed: \$5,600 MRC: \$500 (1/2/21)</p> <p>☰ 1 1/14/23</p>	 <p>Gain PAC, PAC Proposed: \$5,000 MRC: \$1,000 (4/27/18)</p> <p>☰ 1</p>

- The Panel Boxes give you a quick overview of the record and the **Move**.

 <p>Dey (Mrs.), June An... Not Specified Proposed: \$10,000 MRC: \$5,000 (3/10/20)</p> <p>☰ 2 3/11/23</p>	 <p>Banks (Mr.), Joseph Not Specified Proposed: \$5,000 MRC: \$100 (8/12/22)</p> <p>☰ 0 11/30/22</p>
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- **Name** – Click the donor's name to view the full moves details, tasks, and notes, by stage.
- **Proposed/Accepted Amount** – The second line displays the proposed Ask or Accepted amount if one exists.

- **MRC** – View the most recent gift amount and date.
- **Date** – The date in the bottom right shows the expected Move completion date.
-  – This icon shows the number of tasks due for this move.
-  This icon indicates that the Move is past it's expected completion date and needs attention.
- Hover over the  button in the top right corner of the Moves card with your mouse to gain access to additional action items:



- **Add a Task** – Add a task to the Record and Move
- **Add a Gift** – Add a gift to the Record.
- **Process Now** – Process a Credit Card contribution in Crimson. Contact Customer Support to find out how to enable this feature if it is not already.
- **Add a Note** – Add a note to the Record and Move

List View

List view shows the **People Records** and their **Moves** laid out in lists per one of the five stages.

Dashboard View List View 

Moves Management Dashboard   Quick People Search 

1. Discovery 2. Cultivation 3. Engage 4. Stewardship 5. Complete

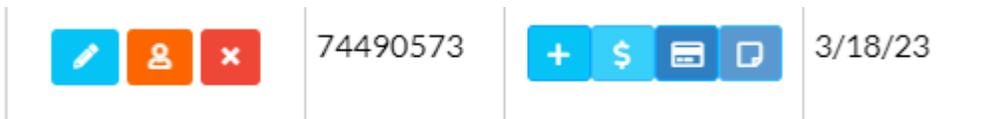
	Pid	Due Date	Stage	Plan	Result	Manager	Full N
  	74490573	12/1/22	5. Complete	Midsize Donor	Proposal Wo	Lydia L Siu	Siu (Ms.), Lydi
  	74000389	3/11/23	1. Discovery	Not Specifec		Lydia L Siu	Dey (Mrs.), Ju
  	74490573	3/18/23	1. Discovery	Major Donor		Lydia L Siu	Siu (Ms.), Lydi
  	74492019	12/3/22	5. Complete	Major Donor		Lydia L Siu	Thomas, Iris
  	74492027	12/13/22	4. Stewardsh	Midsize Donor		Lydia L Siu	Siu (Ms.), Lydi
  	74178543	3/31/22	4. Stewardsh	Prospect Dor		Lydia L Siu	Anderson, Ro

List view shows the **People Records** and their **Moves** laid out in lists per one of the five stages.

- **Quick Search**, located in the upper right side of the screen, allows you to quickly find a People Record in the cycle by Name or PID.

A search bar containing the text "Joseph Banks". To the right of the text is a red "x" icon for clearing the search, a magnifying glass icon for searching, and a question mark icon for help.

- Click  to view the Moves Search filter options available. These enable the user to filter through the current list based on a variety of factors.
- Click  to add a new **Move** (see more on adding below).
- Use the options on the bottom right to pull **Call Sheets**, **Exports**, or **Mail Merge** the respective list.
- The **List View** gives you access to a couple of action items for the Moves.

An action bar for a move record. It features three icons on the left: a pencil (edit), a person (profile), and a red square with an 'x' (delete). In the center is the ID number "74490573". On the right are four icons: a plus sign (add task), a dollar sign (add gift), a credit card (process now), and a document (add note). To the far right is the date "3/18/23".

- **Edit Move** – Open to edit
- **Donor Profile** – Open the People Record
- **Delete** – Delete the Move
- **Add a Task** – Add a task to the Record and Move
- **Add a Gift** – Add a gift to the Record
- **Process Now** – Process a Credit Card contribution in Crimson. Contact Customer Support to find out how to enable this feature.
- **Add a Note** – Add a note to the Record and Move

Moves Search

Search View provides users with the Crimson's classic search feature – including a robust list of available **Filters** and **Output Fields** to generate on screen results and export an excel of your **Moves**.

Moves
 Profile
 Contact
 Group
 Giving Summary
 Gifts
 Giving Aggregate
 Giving Aggregate (Supp)

Suppression

Manager

Starts with

Stage

Choose a Stage

Plan

Choose a Plan

Due Date

(Specify)

Opened Tasks

Tasks to be done

Next Task Due

(Specify)

Key Filters:

- **Manager** – Manager assigned to the Move.
- **Stage** – What stage in the cycle, such as Discovery or Cultivation.
- **Plan** – The assigned plan such as Major Donor.
- **Due Date** – The date the move is due.
- **Opened Tasks** – Will filter for moves with opens tasks that need to be completed
- **Next Task Due** – Search for moves with Tasks due on a certain date or date range.

[← View Result in Dashboard](#)

Moves Management Search

Filters		Output Fields		Result			
Pid	Due Date	Stage	Plan	Result	Manager	Full Name	
74490573	12/1/22	5. Complete	Midsize Donor	Proposal Won	Lydia L Siu	Siu (Ms.),	
74000389	3/11/23	1. Discovery	Not Specified		Lydia L Siu	Dey (Mrs Ann	
74490573	3/18/23	1. Discovery	Major Donor		Lydia L Siu	Siu (Ms.),	
74492019	12/3/22	5. Complete	Major Donor		Lydia L Siu	Thomas, I	
74492027	12/13/22	4. Stewardship	Midsize Donor		Lydia L Siu	Siu (Ms.),	

Search Results

[← View Result in Dashboard](#)

- Click [← View Result in Dashboard](#) to view the Dashboard or List Views with the search filters applied.
- Or use the following search result options:
- Use  to add a new **Move**
- Use  to open a **Move** for editing
- Use  to delete a **Move**
- Use  to export the results to a Excel. **Output Fields** will help you select what information to export

Add Moves

1. To add a **Move**, click  on any of the layouts reviewed above.
1. Then search for and select the **People Record** to assign the **Move** to or add a new **People Record** to the database by clicking .

Add Move - Mr. Seth J. Nye (PID: 74014193)



Subject	
<input type="text"/>	
Life Cycle Plan	Relationship Manager
<input type="text" value="Not Specified"/>	<input type="text" value="Seth Fangman"/>
Life Cycle Stage	Created By
<input type="text" value="1. Discovery"/>	<input type="text" value="Seth Fangman"/>
Proposal Amount	Due Date
<input type="text" value="\$"/>	<input type="text" value="11/17/2022"/>
Proposal Amount Accepted	Created On
<input type="text" value="\$"/>	<input type="text" value="11/17/2022"/>
Note	Attachment
<input type="text"/>	<div style="border: 1px dashed gray; padding: 10px; text-align: center;"> Choose a file or drag it here.</div>
<input type="button" value="Add"/>	<input type="checkbox"/> Completed?

1. Add the **Move** details:

- **Subject** – Required field
- **Life Cycle Plan** – Select a Plan for the Move, these can be edited in People Settings.
- **Life Cycle Stage** – Select the Stage for the move. It will default to 1. Discovery.
- **Proposal Amount** – Input the amount you propose to raise from the donor.
- **Proposal Amount Accepted** – Intended for when the Move is completed.
- **Relationship Manager** – Which user is assigned to manage the Move.
- **Created By** – Will default to user logged in.
- **Due Date** – Date the Move completion is due by.
- **Created On** – Will default to the current date.
- **Note** – Detail and outline the Move for this donor.
- **Attachment** – Attach proposal information, donor profile, and more

Edit a Move

To edit a **Move**, access the move from the Panel Box, List, or Search Results.

Add Move - Mr. Seth J. Nye (PID: 74014193)   

Subject

Life Cycle Plan

Life Cycle Stage

Proposal Amount

Proposal Amount Accepted

Note

Relationship Manager

Created By

Due Date

Created On

Attachment


 Choose a file or drag it here.

Completed?

You can edit all of the **Move** details that was detailed under **Add a Move**, including changing the Stage and submitting a Proposal Amount Accepted, and more.

-  – Click access to the Record's relationships.
-  – Click to access the Record's phone and email information. If on a mobile browser, you can one click call with the phone numbers.

-  - Click to access the call sheets to print and download.
- **Attachments** – Add attachments of any format type.
-  – Click to add a gift.

If you scroll to the bottom half of the **Move** you can manage activity for each stage of the record's Life Cycle.

1. Discovery 5	2. Cultivation 6	3. Engage 1	4. Stewardship 0	5. Complete 0
Open Tasks (4) 	Closed Tasks (1) 	Notes (1) 		
<p>Open Task </p> <p>Meeting Ask: Due Date: 7/26/19</p>	<p>Test Task 3 </p> <p>Meeting Ask: \$50 Due Date: 6/24/19</p>	<p>Test Task 3 </p> <p>Ask: Date: 6/26/19</p>		
<p>Task 2 </p> <p>To Do Ask: Due Date: 7/26/19</p>				
<p>Test 3 </p> <p>To Do Ask: Due Date: 7/26/19</p>				
<p>Test </p> <p>To Do Ask: Due Date: 7/26/19</p>				

- Use the tabs to move back and forth between stages.
- Open Tasks
 - Click  to add a new task or note to the **People Record** and the **Move**.
 - Click on any of the Subjects to open and edit the task or note.
 - Click  to delete any of the tasks or notes.