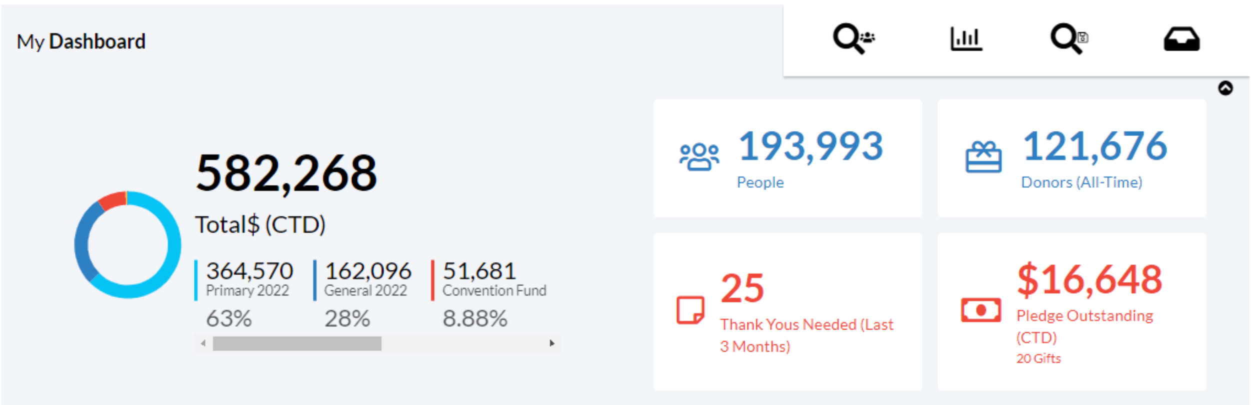
crimson

Crimson General Features

Home

When you first log into Crimson, you will instantly get an overview of money loaded into the database that is current on your **My Dashboard**. Below are the features found on your **Home Dashboard**:



Countdown	This is managed by admin. users and used for elections, major report dates, etc.
Total $ (CTD)	Shows the total raised for CTD or YTD (depending on the specific account). This total is updated on a nightly basis.
People Search	Takes you to the **People Search** screen.
All Reports	Shows you a list of All Crimson reports.
My Searches	Shows you all of your saved searches across the database.
My Payment Requests	Takes you to the payment requests you have submitted. For more information about the **Payment Request** module, see the **Crimson – My Payment Requests** and the **Crimson – Treasury Payment Requests** guides on the HelpDesk.
People Count	Get a quick count of all People records in Crimson. Click the card to generate the People Search results that makes up the total number.
Donors (All-Time) Count	Get a quick count of all Donors in Crimson. Click the card to generate the People Search results that makes up the total number.
Pledge Outstanding	Get a quick count of outstanding pledges. Click the card to run report #263: Paid Pledges Report – Pledges Only.
Thank You's Needed (Last 3 Months)	Get a quick count of records who need Thank You's to be sent (for the last 3 months). Click the card to generate the **Thank you list select** results that make up the total number.
My Tasks	Quickly access all tasks that have been assigned to you. You can complete the tasks, export them as a list in Excel, or view/print call sheets.
My Saved Searches	Run one of your saved searches and see when each was last used.

My Reports	Quickly access all of your favorite reports to run immediately.
My Group Reports	Shows you a list of your group reports that you can run immediately.
Custom Reports	Shows you a list of your database's custom reports that you can run immediately.

Account Menu Options

Your account menu options can be seen from all areas of Crimson. They are located at the top bar of the screen. Below are the menu options available:

Quick Search	There are **Quick Searches** available for every main search menu. You can select which Quick Search you want to use via the drop-down menu and use shortcuts for the different options. For more information about Quick Searches, see the Crimson – Quick Searches guide on the HelpDesk.
Donate Now	Process donations on the fly through **Donate Now**. This can be enabled if you are setup with Merchant Services/WidgetMakr. Contact Support at CrimsonSupport@cmdi.com for more info.
Notifications	Read messages from CMDI and view details for completed Mass Appends.
HelpDesk	View guides, FAQ's, and video tutorials for all Crimson features/functions.
Chat with Support	Chat with Support live during regular office hours or leave a message and we will get back to you as soon as possible.
Account	View your account details, your favorite reports, a list of all Crimson databases you have access to, or log out.

Main Dashboards

People Dashboard	The People Dashboard provides you with an overview of the People records in your database by displaying counts, summary info., dashboard buttons, and top 5 codes. You can also access the **People Search**, **Import**, **People Settings**, **Add a Record**, **Tasks/Calls**, **Merge**, **People Reports**, and **Data Maintenance Reports** here. For more information about the People Dashboard, see the Crimson – People Dashboard guide on the HelpDesk.
Fundraising Dashboard	The Fundraising Dashboard provides you with an overview of your contribution data displaying gift totals and summary information such as top 5 source codes, fundraisers, and locations. You can also access the **Money Search**, **People Search**, **Import**, **Response Analysis Report**, **Money Settings** and **Fundraising Reports**. For more information about the

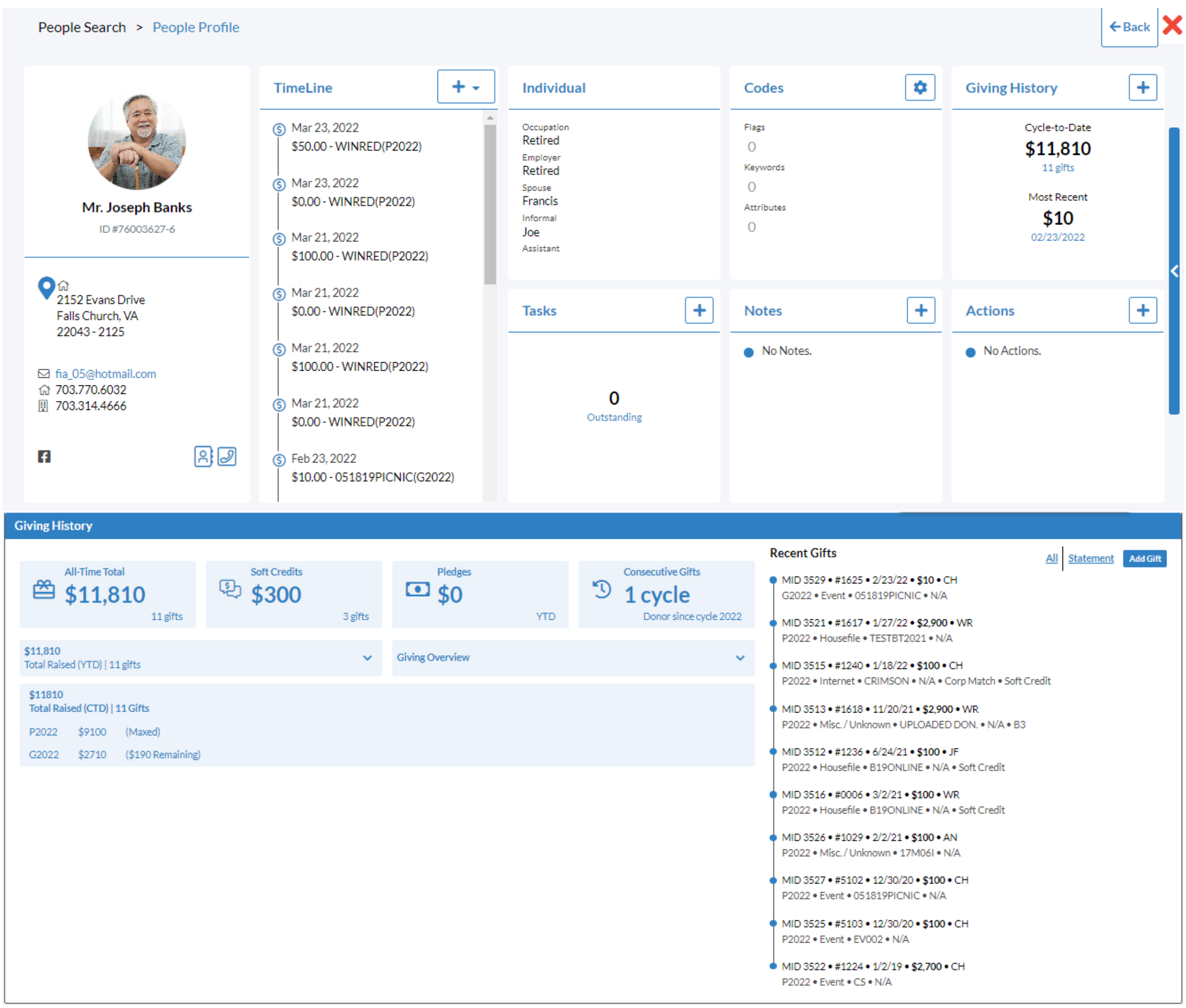
	Fundraising Dashboard, see the **[Crimson – Fundraising Dashboard]** guide on the HelpDesk.
Compliance Dashboard	The Compliance Dashboard helps you keep your data as FEC compliant as possible by alerting you when records should be reviewed and/or addressed further. You can also access **CrimsonFiler**, **FEC Export**, **CC Reconciliation** (available to MeS merchant account enabled databases only), **Compliance Settings**, **Deduping Tool**, **PACs w/out FEC ID**, **Irregular Name**s, **Partnerships & LLCs w/out Attributions**, **Exception Code Select**, **Best Efforts Select**, **Uncoded Overlimit Donors**, **Expiring Coded Overlimit Donors**, **Unbalanced Earmarks**, **Compliance Reports**, and **Data Maintenance Reports**. For more information about the Compliance Dashboard, see the **Crimson – Compliance Dashboard** guide on the HelpDesk.
Treasury Dashboard	The Treasury Dashboard provides an overview of treasury data by displaying totals by date range for other receipts and expenditures, counts of records that may need attention, and summary information such as top payees and transactions. You can also access the **Payee Search**, **Expenditure Search**, **Receipt Search**, **Treasury Import**, **Treasury Settings**, **New Payee**, **New Expenditure**, **New Receipt**, **Payee Merge**, **Totals Contributions to Other Committees**, **Ultimate Vendor Payments**, **Total IE $ per Election by Dissemination Date (YTD)**, **Total IE $ per Election by Transactions Date (YTD)**, **Treasury Reports**, and **Reconciliation Reports**. For more information about the Treasury Dashboard, see the **Crimson – Treasury Dashboard** guide on the HelpDesk.
Financial Summary Dashboard	The Financial Dashboard provides an overview of your invoice data, **Payee Search**, **Invoice Search**, **Expenditure Search**, **Pay Invoices**, **Payment Approval**, **Transfer Funds**, **Reconciliation tool**, and **Treasury Reports**. For more information about the Financial Summary Dashboard, see the **Crimson – Financial Summary Dashboard** guide on the HelpDesk.
Data Entry	Data Entry is the process of adding contributions into the database through batches. For more information about Data Entry, see the **Crimson – Data Entry** and the **Batching and Caging Best Practices** guides on the HelpDesk.
Event Dashboard	The Event Dashboard provides an overview of event data by displaying total amounts, counts, a map of where events are located, and summary information on top events, fundraising codes, and locations. You can also access the **Event Search**, **Import Invitees**, **Add Event**, **Events Reports**, and **Fundraising Reports**. For more information about the Event Dashboard, see the **Crimson – Event Dashboard** guide on the HelpDesk.
More	The More menu will have additional dashboards if they are enabled for your database such as the **Bundler**, **PAC**, **JFC**, and **Conduit** dashboards. For more information about the additional dashboards, please contact CrimsonSupport@cmdi.com.

Settings The Settings menu allows you to access the **People**, **Money**, **Compliance** and **Treasury** Settings which can all be accessed via the corresponding dashboards too.

People Profile

The **People Profile** in Crimson segments data into separate panels and includes summary information in each. When a panel is selected, the lower half of the profile will display that panel's summary details and analytics as well as the list of records that are being summarized.

You can use the Quick People Search or full People Search to view and edit an existing People record. To learn more about the quick searches or new search features in Crimson 3, see the [Crimson – Quick Searches]() or [Crimson – New Search Features]() guides on the HelpDesk. For more information on the People Search, see the [Crimson – People Search]() guide on the HelpDesk.

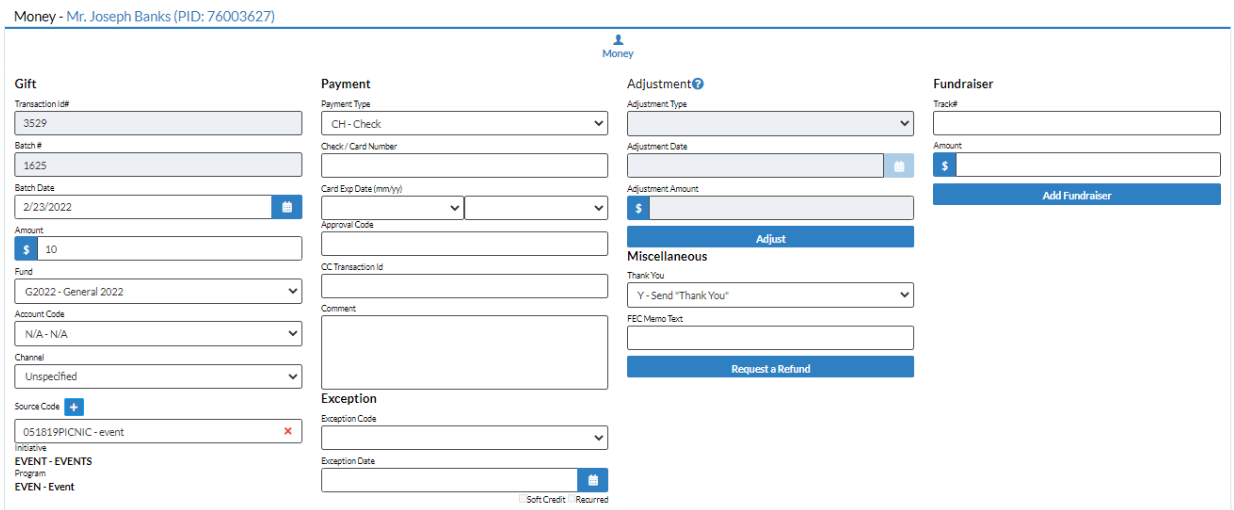


For more information on the People Profile, see the [Crimson – People Profile Panel Details]() guide on the HelpDesk.

Money Record/Window:

While in a People record or profile, you can view/select the **Giving History** panel and click a contribution to view the full details of it. You can also use the **Money Search** to find a specific contribution and view the same details. For more information about the Money Search, see the [Crimson – Money Search]() guide on the HelpDesk.

You can start editing a field by just clicking within it and making changes. After you have made updates, click the **Save** button at the bottom right corner.



Gift Details

Transaction ID# - Known as the MID, it is the unique contribution ID.
Batch # - This is the alphanumeric ID you have assigned to a money batch entered through data entry or imported in.
Batch Date – This is the gift's date used for reporting and the date the batch was entered.
Amount – The Contribution amount.
Fund – This is the fundraising code assigned to the gift tying it back to an election cycle for Candidate Committees or a particular committee (ie. PAC or JFC) in a shared database.
Source – This is the fundraising code assigned to the contribution tying it back to the event or source it came from.

Payment Details

Payment Type – Shows the contribution's money type: Cash, check, etc.
Check/Card Number – Where the check # or credit card # is stored. Please note, you cannot store a full CC # in Crimson.
Received Date – Additional gift date field that you can have enabled if needed. Please reach out to [CrimsonSupport@cmdi.com]() for more info.
Comment – Any comments you would like to make for the contribution.
Approval Code/CC Transaction ID/Reference ID# - Additional credit card processing fields that relate to Crimson/WidgetMakr (MeS) CC processing.

Exception Coding	To add an **Exception Code** to a contribution, select one from the drop-down menu and enter an Exception Date. These codes are used to flag gifts that need further attention for FEC Compliance. For example: over-limit donors, partnership attributions, personal funds verification, third party signatures, etc. The purpose of assigning these codes is to make it easier to pull the lists for Exceptions Letters that need to be sent to Donors. For more information on Exception Codes, see the **Crimson – Exception Codes** guide on the HelpDesk.
Adjustment	Press the **Adjust** button to select an **Adjustment** type from the drop-down menu such as refunds, redesignations, reattributions, etc. You will then add an adjustment date and either search for another donor, fund code, etc. for the contribution to be adjusted to.
Miscellaneous	**Thank You** - Allows you to establish whether a thank you is needed or as already been sent for the gift. **FEC Memo Text** – Add FEC Memo Text here for FEC reporting purposes.
Fundraiser Tracking	If you choose to create a tracking system, then you can assign a **Track #** and **Amount** to contributions in this section.