crimson

Keywords are useful in organizing your **People** records and categorizing them in easily searchable groups. Keywords are often used to track coalitions, issues, and to list source and volunteer activities.

Creating and Editing Keywords

• To create a new custom keyword or view existing keywords, click **Settings** on the **Main Menu** and then select **People** or select **Settings** from the **People Dashboard**. Select the **Keyword** tab from the top of the screen. A list of your existing keywords will appear along with the total number.

Flag Keywo	rd Attribute	Action Club	Club Status Cont	act Flag Ev	vent Status	People Code	Task Type
Task Purpose	Event Invitee Type	Fundraiser Group	s Fundraiser Title	Template			
Add							
Search Code, Desc	cription						
			Code			Descrip	otion
l	🖌 🗶 🗊	ANSWER	PHONES				
I	🖊 🗙 💼	HOST PA	RTY		Willing t	o host party	
l l	🖍 🗙	ECONOM	lic		Economy	r is their big issue	
	🖍 🗙 🗊	POLLS			Willwor	k at the polls	
l	🖍 🗙 🗊	LETTERS	TO EDITOR				
I	🖊 🗙 💼	IRAQ COI	NCERNS				
l	🖌 🗙 💼	DOOR TO	DOOR				
		DALLY					

- To search for certain keywords, type search variables into the **Search Bar**. The search variables may appear in the **Code** or **Description** sections.
- To view and edit a keyword click the button to the left of the keyword you are trying to edit/view.
- To delete a keyword, click the button to the left of the keyword you're trying to delete. A confirmation message will appear asking, "Are you sure to delete?" Click **Yes** to delete the keyword permanently or **No** to cancel.

**Please note: You cannot delete a keyword that's currently being used in Crimson. In order to delete any keywords, you'll have to confirm that it is not in use for any records first.

• To create a new keyword, click the Add button and a new **Keyword - Add** window will appear.

A	dd Keyword	;	K
	layord .		
	Pergeon		

- Enter a **Keyword Code** of up to 30 characters that will help you remember its significance (Ex: DOOR TO DOOR or HOST PARTY).
- Enter the full **Description** for the keyword.
- Click the **Save** button when you have completed the **Code** and **Description** fields. You may click the **Cancel** button at any time to exit the **Add Keyword** window.

Using Keywords in a People Record

Within a **People** record, keyword information is displayed in the **Flags & Keywords** panel at the top of the profile. If there are keywords attached to the record, there will be a list of up to five keywords with a number of how many more are tagged to this profile. To see more, click on the panel and the profile will show a panel summary of flags and keywords. Select the keyword tab to see the keyword overview.

Codes	
Flags Keywords Attributes	
	+
Available Keywords	Assigned Keywords
Search available keywords	Search assigned 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) 	DOOR TO DOOR (9/17/13) Adamiist Adamiist (3/28/18) b v bv b v bv (12/7/20) bc xvnfdbn bc xvnfdbn (12/2/20) COUNTY FAIR (9/17/13)

• In this view you can search assigned and available keywords, use the arrows to move a selected keywords from "Available" to "Assigned" and vice versa. Next to each keyword, you can see the description and the date it was added to the record.

• To create a new keyword in Crimson and add it to the record, click the button and begin twoing the new keyword in the field. Once done, press the button to create and add the

typing the new keyword in the field. Once done, press the **button** to create and add the keyword. This will create a new keyword that can be used for the entire database.

You can also use the Mass Append function to assign flags to multiple people records at once. For more information, please see the Mass Append – Flag, Keyword, Notes, Events and Tasks guide.

Searching with Keywords

When searching for **People** records, you may search for all records with one or more keywords under the **Group** section.

Profile Contact Group (1)	Giving Summary Gifts Gi	ving Aggregate Giving Aggregate (Supp)
Non-Donor	People Code Enter People Record Code Choose a People Code	People Type Enter People Record Type Choose a People Type
Industry Choose a Industry ~	Top Flag	Flag In list of ✓ Search Flags
Flag Date	0 Having All Flags	Kevword X 🛛

You may also use keywords to hide certain records when searching by entering those keywords you wish to exclude under the **Suppression** section. You can search for general keywords or you can search "Supp: Having All Keywords" which will suppress results that have all the listed keywords in the field.

Profile Contact Group (1)	Giving Summary Gifts Giving ,	Aggregate Giving Aggregate (Supp)
Apply Channel Suppression Flags	Supp: Flag In list of Search Supp: Flags	Supp: Having All Flags in list of Search Supp: Having All F
► Supp: Keyword in list of ANSWER PHONES ► Search Supp: Keywords	Supp: Having All Keywords in list of • Search Supp: Having All I	Supp: Event Code

For more detailed information on searching and using the Suppression functionality, please see <u>Crimson: People Search</u> solution.