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.

	Code	Description
✏️ ❌ 🗑️	ANSWER PHONES	
✏️ ❌ 🗑️	HOST PARTY	Willing to host party
✏️ ❌ 🗑️	ECONOMIC	Economy is their big issue
✏️ ❌ 🗑️	POLLS	Will work at the polls
✏️ ❌ 🗑️	LETTERS TO EDITOR	
✏️ ❌ 🗑️	IRAQ CONCERNS	
✏️ ❌ 🗑️	DOOR TO DOOR	

Tabs: Flag, Keyword, Attribute, Action, Club, Club Status, Contact Flag, Event Status, People Code, Task Type, Task Purpose, Event Invitee Type, Fundraiser Groups, Fundraiser Title, Template

Add

Search Code, Description

- 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.

- 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.

- 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 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.

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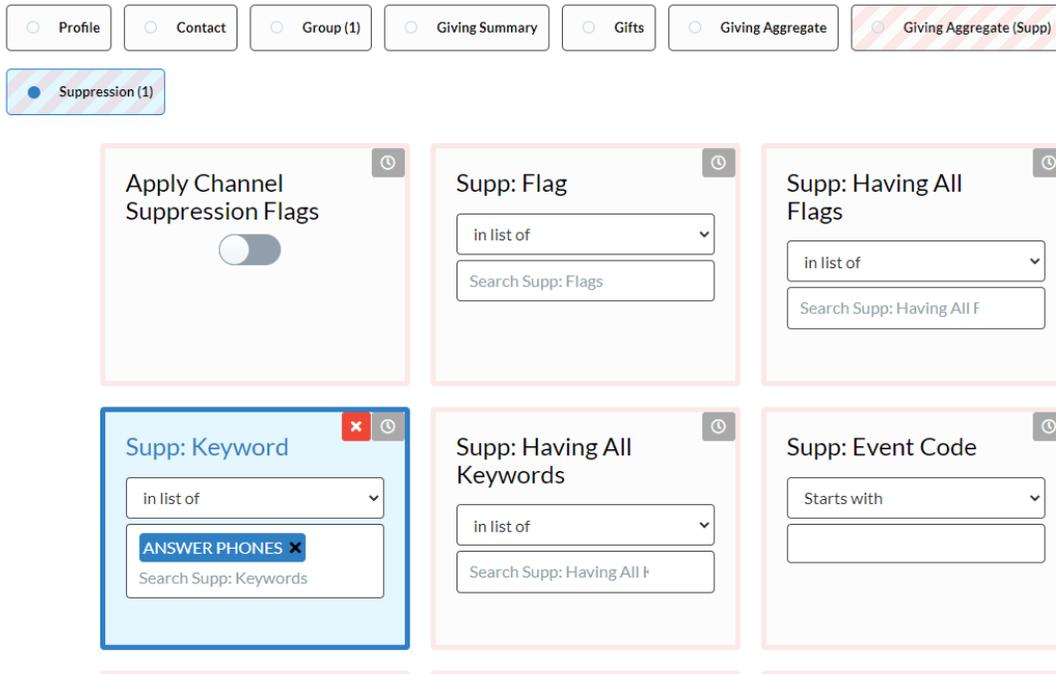
For more detailed information on searching and using the Suppression functionality, please see **Crimson: People Search** solution.