


Attributes help you categorize People Records based on their involvement with your committee or campaign. For example, you can use Attributes to identify active/inactive Volunteers, Major Donors, Grassroots Organizers, and more. Attributes are completely customizable so that you can easily identify the correct label for each record in your database.

In Crimson, **Attributes** have two layers:

- **Attribute Category** – This tells the end user the nature of the attribute. For example:
 - Volunteer
 - Major Donor
 - Staff
- **Attribute** – This identifies the exact relationship of the People Record. For example
 - **Volunteer**
 - Events
 - Door Knocker

Setting up Attribute Codes

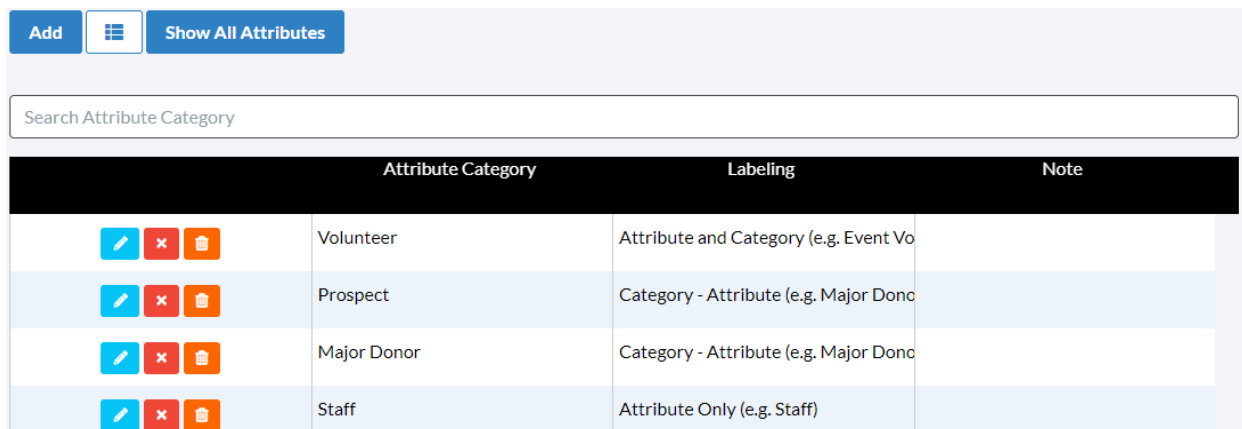
In order to organize your records, you must first create the attributes and the attribute categories. Note: **Crimson** does come with defaults, however, you can modify these as needed.













Click on the **People Dashboard** from the **Main Menu** on the left-hand side and then click the  button in the top right of the **Navigation Bar** to open **People Settings**.

1. Select the **Attribute tab**.




- To easily see all **Attributes**, before viewing **Categories**, click . If the Attribute Category already exists, skip to Step 6 to add **Attributes**.

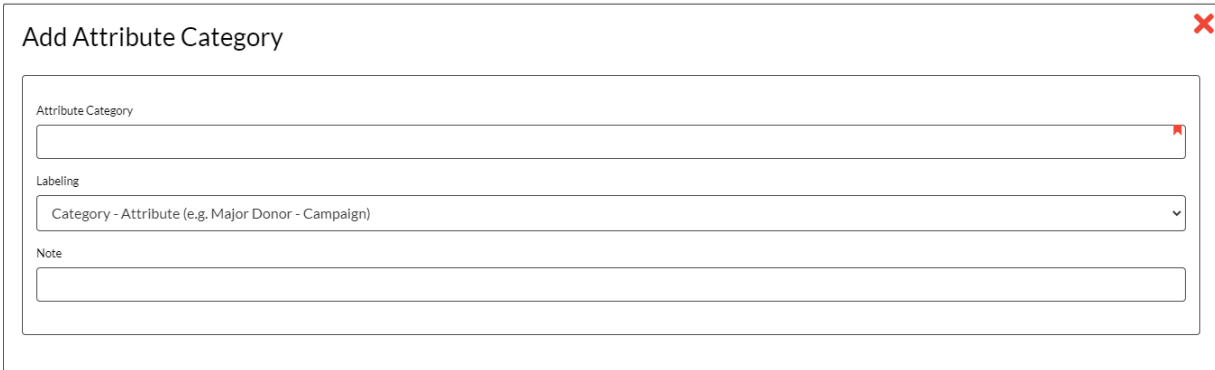
2. A list of existing **Attribute Categories** will appear so that you can view and manage. Click the **Add** button to setup a new Attribute Category.



Attribute Category	Labeling	Note
   Volunteer	Attribute and Category (e.g. Event Vo	
   Prospect	Category - Attribute (e.g. Major Dono	
   Major Donor	Category - Attribute (e.g. Major Dono	
   Staff	Attribute Only (e.g. Staff)	

3. To add, fill out the **Attribute Category** and select a **Labeling** order.
4. Labeling will determine how the Attribute is displayed elsewhere in Crimson. For example, “Category – Attribute” will always put the Attribute Category first, followed by a hyphen and then the Attribute (**eg Volunteer – Phone Banking**).
5. Click **Save** when done.

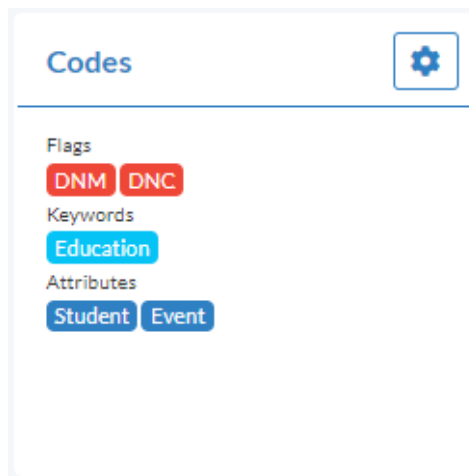
- Next, to add the **Attributes**, first select the respective **Category** by clicking .
- Then click  in the **Edit Attribute Category Window**.
- Click  and add the **Attribute Name** and Note, if desired:




- Click **Save** when done.

Assigning Attributes to People Records

When in a **People Profile**, you can assign **Attributes**, and other helpful codes. Simply click on the **Codes** panel box, and you will be defaulted to the **Attributes** tab.



- From here, select any of the available **Attributes** and use the  icon to assign it.
- Select from assigned **Attributes** and use the reverse arrow to remove an Attribute.
- The item in a blue label is the attribute's **Category**.

Codes

Flags Keywords Attributes

Available Attributes

Search available attributes...

- Volunteer General
- Volunteer Administrative
- Prospect Donor
- Prospect Recurring
- Prospect High Dollar

Assigned Attributes

Search assigned attributes...

- Volunteer Student (11/11/22)
- Volunteer Event (11/11/22)

Recent Include Inactive [All](#)

- Volunteer - 11/11/22 - Present Student
- Volunteer - 11/11/22 - Present Event

- Once an **Attribute** is assigned, it will be added to the **Recent** list on the right-hand side.
- Use the toggle to remove or include Inactive **Attributes**.
- To access the additional **Attribute** features, select the assigned Attribute from here.
- In the edit window, you can adjust the **Start** and **End Dates** by typing or using the calendar tool.
- The **Attribute** will default to **Active** or **Inactive** depending on if there is an End Date and if that date has passed. You can override this by clicking the toggle.

People Search > People Profile > Edit Attribute People ← Back ✕

Event Volunteer

Start Date
11/11/2022 📅

End Date
 📅

Active

- Lastly, to view all assigned **Attributes** in a list view, click **All** to the top right of the Recent list. From here, you can use the filters to sort, delete, or open one for editing.

People Search > People Profile > Attribute People List ← Back ✕

Attribute People

Category Date Active Only

Hide Filters

Attribute	Category	Start Date	End Date
✎ ✕ Student	Volunteer	11/11/22	
✎ ✕ Event	Volunteer	11/11/22	

« < 1 > » 10 Items per page 1-2 of 2 items

Mass Append – People Search

You can use Crimson’s **Mass Append** feature to append Attributes to a set of People Search Results.

1. Run your desired People Search and then select **Mass Append** (next to **Export**).
2. From the new window, click the **Attribute** tab.

Mass Append (12 records selected) ?

Flag Keyword **Attribute** Note Task Event

Attribute

Attribute Lookup

Start Date

End Date

Submit

Settings	System	CrimsonFiler						
			76003183	Mr.	Buddy	H.	Banks	
			76003483	Mr.	Joseph	M.	Banks	Sr.

3. From here, use the lookup tool to find the **Attributes**.

4. Enter the start and end dates, and when finished click

Submit

Import – New Contacts or New Gifts

When importing an Excel as part of a New Gift, New Contacts, or Append import, follow the same import process as you normally would for a **New Contacts** or **New Gifts** Import, but add the following columns to be able to import **Attribute** information:

- **Attribute Name** – Put the Attribute name here, just the name not the Category.
 - NOTE: The Attribute must exist in **People Settings** first to be able to import.
- **Attribute Start Date** – This is for the Start Date.
- **Attribute End Date** – This is for the End Date, not required.
- **Attribute Active** – Crimson will either assume based on date information, or you can use a Y for active or N for inactive.