crimson

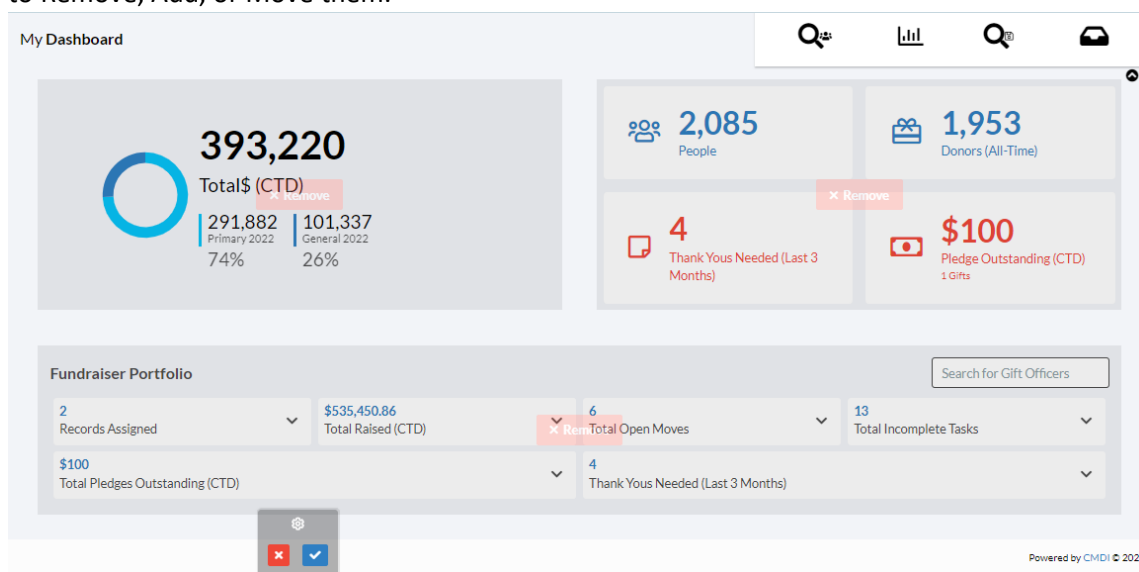**Crimson: Customizable Dashboards**

With our dashboard customization settings, you can add, remove, or move items on your **Home**, **Fundraising**, **People**, **Compliance**, **and Event Dashboards**. This will allow you to tailor the major Crimson dashboards to fit your unique needs. These custom settings will be saved to your user account, and will be applied to the unique database you saved them in.

Customizing the Dashboard

- To start customizing a dashboard, hover over the [⚙] customization button at the bottom of the dashboard you have selected.

- Click the green blue edit button that appears below [⚙/✏].

- This will enable customization mode. Hover over the Dashboard items prompting you to Remove, Add, or Move them.

- **Remove** – Click [✕ Remove] to remove an item from the dashboard view

- **Add** – Click [+ Add] to add an item to the dashboard view.

- **Move** – To move panels locations on the Home Dashboard, simply click and drag a panel to a new spot on the dashboard, then let go.

- Once you have made your changes, click the [✓] button in the customization icon to save your changes or [✕] to cancel.

Customization Options Available

The following dashboard features are now available in the dashboards indicated, in addition to the default features normally available. Please note, dashboard views are also dependent on user group settings. If you have any questions about your settings available, please reach out to CrimsonSupport@cmdi.com.

Home

- All Reports
- Next Events
- Top 5 Clubs
- Top 5 Keywords
- Top 5 Flags
- Top 5 Congressional Districts
- Top 5 Zip Codes
- Top 5 Cities
- Top 5 Counties
- Top 5 Fundraisers
- CTD Line Graph over Years
- Donation Totals by Different Periods of Time (CTD, 30 Day, 7 Day, etc.)
- Countdown (can be set to the date and title of your choosing).

People Dashboard

- Fundraiser Portfolio
- My Moves
- My Tasks
- All Reports
- People Reports
- Data Maintenance Reports
- My Saved Searches
- My Reports
- Top 5 Events
- Bad Address
- Uncoded Overlimit Donors
- Compliance Cards (PAC's w/o FEC ID, Irregular Names, Short Last Names, and Partnership w/o Attributions)

Fundraising

- Outstanding Pledges
- All Reports
- Fundraising Reports
- My Reports
- My Saved Searches
- My Moves
- My Tasks
- 6 Event Dashboard cards (Events Total Raised, Events Net Raised, Event Invitees, Upcoming Events, Outstanding Event Pledges, Events Not Linked to a Source Code)

Events

- All Reports
- My Reports
- My Saved Searches

Compliance

- All Reports
- My Reports
- My Saved Searches