



Quick Reference – Crimson Bundler Tracking with RPM

Bundler tracking in Crimson allows you to view all the gifts associated with a fundraiser and the fundraisers they have recruited. This guide will cover the enhanced bundler tracking features available in Crimson and how they relate to CrimsonRPM.

Creating and Using a Bundler Profile in Crimson

To use bundler tracking, bundlers must be given a unique tracking number that can then be associated with the specific gifts they solicit. If a bundler ID is created in Crimson, it will also create a bundler profile in RPM with the corresponding Bundler Tracking #. Take the following steps to assign a tracking number to a fundraiser:

1. Use the **People** search to find and open the bundler’s profile. If a profile has not been created for a bundler, use the **Add A Record** option under the People menu to create the record.
2. Click the 
3. button at the top of the profile to create a new tracking number



4. Crimson can be enabled to automatically assign a unique 4-digit tracking number to the record or you can manually type in the unique number and click the save button.
 - If you want to edit or remove the tracking number that was automatically assigned by Crimson, click **Edit Full Record** at the top of the profile and then edit the **Tracking#** field.
5. The saved tracking number will appear as a hyperlink on the profile. Click that hyperlink to open the bundler fundraising window. The fundraising window displays information on the fundraiser.

Fundraising
Fundraising - [74157837] Mr. Joseph S. Banks, Jr. Print Downlines

Track # 9876	Lobbylist No	Incentive(\$) \$10.00	Downlines #9876 Mr. Joseph S. Banks, Jr. \$0.00 #3005 Ms. James Henry Siu, Sr. \$434.00 #3032 Mrs. Wilfredo A. Fickes \$0.00 #1001 Mr Keith A. Beltx \$1000.00 #100 Mr. Barbara Quarture \$0.00 #3034 Mr. Harold R. Cross \$0.00 #3033 Mr. Marilyn June Johnson \$0.00 #3035 Ms. Elizabeth A. Morrison \$0.00	Track # 9876
Title Level 5	Verified By Ginny	Raised \$0		PID 74157837
Rec. Track # 1234	Date 10/30/09	Rollups \$13,380		Raised \$0
Rec. Name Mr. Adam Smith	Existing Group(s) COWBOYS GROUP6 GROUP9 SMITHBUNDLERS	Shared \$0		Rollup \$13,380
Commitment(\$) 60,000.00	Available Group(s) <Select a Group>	Total \$0.00		Shared \$0
State VA				Incentive \$510
Pledged \$2,805				

Cancel Save

Crimson Bundler Fundraising Page

*Track #	This is the unique ID created for the bundler. This unique ID is searchable in the People Search , Money Search , and some Detailed Reports . This ID will also be created and used in RPM.
Title	This is an option field. Under Money Settings , admins can create Titles and Groups for bundlers to help manage and acknowledge their different fundraising levels based on fundraising goals. Ex: Title = "Level 1".
Rec. Track #	Enter the bundler tracking ID for the person the bundler should roll up to in credit for funds raised. Rollup totals can be fund on the Fundraising page, in the print downlines, and various bundler tracking Detailed Reports.
Rec. Name	After the Fundraising Page has been saved with Recruiter Tracking # details, the Recruiting Name will appear here as a hyperlink to their direct profile.
Commitment \$	This is the amount the bundler has committed to raise for the campaign.
State	This is the state the bundler is raising funds for. Bundler tracking detailed reports are available for state breakdowns.
Pledged	This is not an editable field. This is the total pledge amount (\$) credited to the bundler.
Lobbyist	Use this indicator If lobbyists are raising funds on behalf of the campaign. CrimsonFiler will then pull this information for Form 3L reports created.
Existing /Available Group	This is an option field. Under Money Settings, admins can create Titles and Groups for bundlers to help manage and acknowledge their different fundraising levels. Ex: Group = "NorthEast" or "Group 1".
Incentive	Plug an amount (\$) here to raise the bundler's totals reflected on reports if there needs to be a temporary holder to credit funds raised by the bundler.
Raised	This is not an editable field. This amount reflects the total raised by a bundler based on their Tracking# being applied to gifts being entered.
Rollup	This is not an editable field. This amount reflects the total amount raised by the bundlers who roll up to the bundler.
Shared	This is not an editable field. This amount reflects the total amount of shared funds raised between two or more bundlers.
Total	This is not an editable field. This amount reflects the totals funds raised by the bundler, the rollup money raised, and their shared money raised.

*Required Field

Downlines

View a tree of the bundler's team they recruited. Show or hide more information about each member of their bundling team by clicking on the arrow icon by their name. Each bundler's total raised will appear next to their name on the list. If you click on any bundler's name, you can see their summary info to the right which includes: **Track #**, **PID**, **Raised**, **Rollup**, **Shared**, and **Incentive**. Click the

[Print Downlines](#)

button to view a full report of the bundler's downline information.

Link a Crimson Gift to a Bundler

The fundraiser tracking # associated with a gift should be entered into Crimson at the time of data entry/import, but in cases where it must be added later, it can be done by editing that gift in Crimson.

To give credit to a fundraiser for a gift already entered into Crimson:

1. Use the People Search to open the donor's profile. View the gifts listed for the profile, and open the one that needs to be credited to the bundler.
OR Find the contribution through the **Search** in the **Money** menu.
2. Click **Edit** and enter the bundler's **Track #**. As you enter the tracking #, a drop-down list will populate with existing fundraisers that start with those numbers. Select the correct bundler.
3. The **Amount** will automatically be filled in with the entire gift amount, but you can edit this before clicking **Add Fundraiser**.

Fundraiser

Track#

Amount

+ Add Fundraiser

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