

In Crimson, you have the ability to create a **Donor Giving Statement** while using **Money Search**. It will give you a donor's history statement for a given time period and total per fund codes in that period.

How to Create a Giving Statement Organization

1. Go to  icon on the **People Dashboard**.

2. Select the **Giving Statement Organization** tab then click .

3. On the new page please fill out all the fields with red flags and then select .

Add Giving Statement Organization ✕

Organization Name	CMDI
EIN	98-7654321
Street	1593 Spring Hill Rd
City, State, Zip	Vienna, VA 22202
Organization Statement	In order for Your Committee or Organization to use Crimson, you must purchase Our Services by agreeing to the terms of this Master Subscription Agreement.

Cancel Save

How to Create a Donor Giving Statement

1. Go to  icon on the **Fundraising Dashboard**.

2. Fill out the desired filters for your search and click .

Note: If you do not want soft credit included in your Donor Giving Statement please make sure to use the exclude soft credit toggle in your search. For this to only pull the gifts in your giving period, you must use a Batch Date filter that matches the giving period you will use in Step 4.

3. On the result page, click  and select **Giving Statement**.

4. On the new window, you will have the option to select an existing organization or to create a new one in **People Settings**. You will then enter in the **Gift Period** for the statement.

Giving Statement ✕

Organization Add

CMDI

Gift Period

1/1/2024 - 12/31/2024

Disclaimer: Contributions made to political committees are not deductible for federal income tax purposes.

- 📁 Data Entry
- 📄 Data Entry (Adv)
- 📅 Event
- ⚙️ More
- ⚙️ Settings
- 🖨️ System
- 📄 CrimsonFiler

	ID	DonorID	Prefix	First	Middle	Last
✎	596720	74548809	Miss	Brooke	Noelle	Taylor
✎	596721	74548809	Miss	Brooke	Noelle	Taylor
✎	596722	74548809	Miss	Brooke	Noelle	Taylor

Print

5. Once all the fields have been filled out please click Print.

6. After you print the **Donor Giving Statement**, your page will appear as seen below.

CMDI
98-7654321
1593 Spring Hill RD
Vienna, VA 22202

Brooke Taylor
34 Test Rd
Testville, FL 34238

Page 1 of 1
Brooke Taylor

Giving Statement
Gift Period: 1/1/2024 - 12/31/2024

Payments

Gift Type	Gift Date	Fund	Contribution Amount	Check Number
	03/27/2024	G2024	\$500.00	
	03/27/2024	P2024	\$100.00	
	03/27/2024	G2024	\$200.00	

Total gift amount of payments	\$800.00
Total contribution amount of payments	\$800.00
Total number of payments	3

Fund Totals

Fund	Total
G2024	\$700.00
P2024	\$100.00

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