Actions help you track how People Records interact with your committee or campaign. You can track involvement of all kind, including event staffing, volunteer hours, and voter outreach like door knocking or phone calls. Actions are completely customizable so that you can easily identify the correct action for each record in your database.

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

- **Action Category** – This tells the end user the nature of the action. For example:
    - **Volunteer -** is this action identifying a type of Volunteer and their hours spent
    - **Event** – is this action related to an event activity
    - **Voter Outreach** – is this action related to voter outreach management

- **Action** – This identifies the exact type of Action. For example, they might be Capitol Tour, Office Visit, Door Knocking, or Phone Banking.
    - **Volunteer**
        - Set-Up
        - Check-In
        - Booth
    - **Event**
        - Host
        - Sponsor
    - **Voter Outreach**
        - Door Knocking
        - Phone Calls

Actions also have **Custom Columns**. Custom Columns help you record custom, key aspects about the People Record completing the action. For example, for the Volunteer Category you may want to have a custom field for hours. Your final Action Settings may look like:

- **Volunteer**
    - Set-Up
        - Status (dropdown options: Signed Up/Attended)
        - Volunteer Hours (free form text)
        - Sign-Up Date (date selector)

Setting up Action Codes

In order to organize your records, you must first create the actions and the action categories. Note: **Crimson** does come with default Actions, 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**.
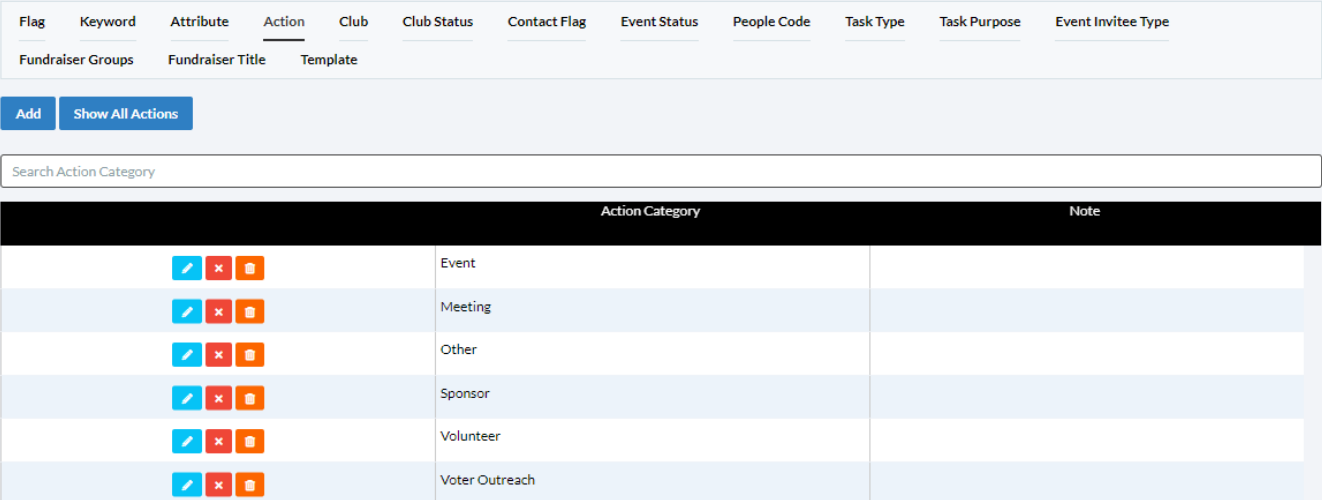
1. Select the **Action** tab.
   - To easily see all **Actions**, before viewing **Categories**, click **Show All Actions**. Skip to Step 5 to add **Actions**.
2. A list of existing **Action Categories** will appear so that you can view and manage each one. Click the **Add** button to setup a new Action Category.
   - If the Action Category is already setup, skip to Step 7.

		Action Category	Note
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 **Show All Actions**

Search Action Category

	Action Category	Note
✏ ✖ 🗑	Event	
✏ ✖ 🗑	Meeting	
✏ ✖ 🗑	Other	
✏ ✖ 🗑	Sponsor	
✏ ✖ 🗑	Volunteer	
✏ ✖ 🗑	Voter Outreach	

3. To add, fill out the **Action Category** and create any **Custom Fields**.
4. To add a Custom Field, click **Add a New Field**.
5. After you add the Custom Field Name and select the Type for the value of the Custom Field.
   - **Text** – With text the answer you create a set of look up values for the user to answer
   - **Number** – Add a minimum and maximum range
   - **Date** – Select this if you want the value in a date style
6. Click **Save** when done.
7. Next, to add the **Action**, first select the respective **Category** by clicking ✏. Then click **Show Actions** in the **Edit Action Category** window.
8. Click **Add** and add the **Action** name and Note, if desired:
   - **Assign Attribute** – Assign an Attribute to have one automatically appended to a People Record when this Action is assigned. For more information, read our Attributes guide.
   - **Custom Columns** – In addition to being added at the Category level for all Actions in the category, these can also be created at the action level for further customization.

Add Action

Action
Phone Banking

Assign Attribute (optional)

Note

Custom Fields:

Name
Status

Type
text

Look up values:
Signed Up ✗ Attended ✗

Enter value for look up

Add Lookup

Add a New Field

9. Click **Save** when done.

Assigning Actions to People Records

When in a **People Profile**, you can assign **Actions**, just select the **Actions** panel to start.

Actions +

Apr 07, 2023
Event - Dinner

Nov 11, 2022
Meeting - Meeting

Sep 05, 2022
Volunteer - Check-in

From here, click the **Add Action** icon to assign a new one.

Actions

⊞ Add Action

	Action Category	Action	Action Date	Source Code	Note
✏ ✗	Event	Dinner	4/7/23		
✏ ✗	Meeting	Meeting	11/11/22		
✏ ✗	Volunteer	Check-in	9/5/22		

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When you begin to type in the Action field, available Actions will appear in a drop down for you to select. Once an Action is selected, the appropriate Custom Columns will appear.

Additional default fields:

- **Action Date** – This a required field. It will automatically prefill with the current date but can be edited.
- **Source Code** – You can link a related Source Code to an Action. For more information on this code, check out our guide on Fundraising Codes.
- **Note** – Optional free text.
- **Attachment** – Ability to upload documents.

Once an **Action** is assigned, it will be listed in the assigned **Actions** list. Of the People Profile.

- Click to edit
- Click to delete.

Import – Actions Import

When importing an Excel list of Actions, follow the same import process as you normally would for a new Contacts import, but in **Step 2 – Import Type** select **Action**. Before importing, make sure the following Action related columns to import **Action** information:

- **Action Name** – Put the Action name here, just the name not the Category.
    - NOTE: The Action must already be created in **People Settings** before importing.
- **Action Date** – This is for the Action's Date. This is required for import.
- **Action Source Code** – Source Code, not required.
- **Action Note** – Free text, not required.
- **Custom Fields** – You can import Custom Field information. The custom fields and the values do have to match options that are already in the system. If you have not created them first, you can add them in People Settings. For each custom field use the format below, adding a number
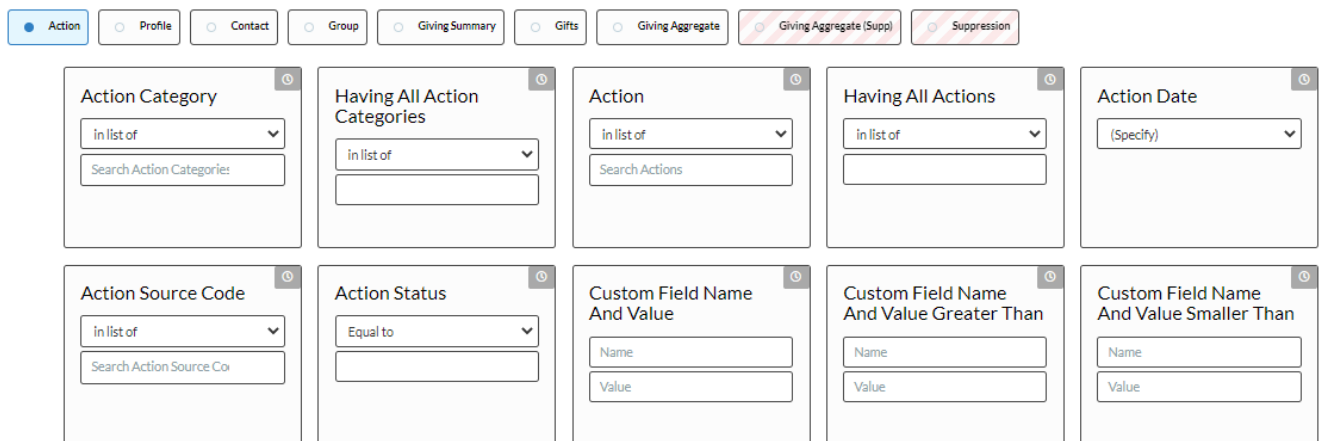
for each additional custom field. First, add the Field name, second add the value (look up value, number, or date).

- **Action Custom Field 1**
  - Example: Status
- **Action Custom Field Value 1**
  - Example: Attended

Searching for Actions

Running a search for Actions is similar to all other searches found throughout Crimson, with filters designed specifically for Actions.

- To find the **Action Search**, go to the **People Dashboard** and click on the icon in the **Navigation Bar**.
- The search will provide transactional results, meaning a People Record may appear multiple times if they have multiple actions that match the filters.

Action Filters

- **Action Category** – Search for actions within an Action Category
- **Action** – Search specific actions
- **Having All Action Categories** and **Having All Actions** – Similar to the above, but you are searching for what matches ALL of the categories or actions that you list.
- **Action Date** – Date of the actions
- **Action Source Code** – Source Code of the actions
- **Custom Field Name and Value** – Search by the Custom Fields created for the actions. First, add the Custom Field name in the first box, then the second in the Value for the field.
- **Custom Field Name and Value Greater Than** and **Custom Field Name and Value Smaller Than** – Same as above but will search for actions that are greater or smaller than the value entered.
- There are also two **Suppression** filters
  - **Action –** suppresses any actions
  - **Having All Action Categories** – suppresses all actions listed

Supp: Action

in list of ⌄

Search Supp: Actions

Supp: Having All Action Categories

in list of ⌄