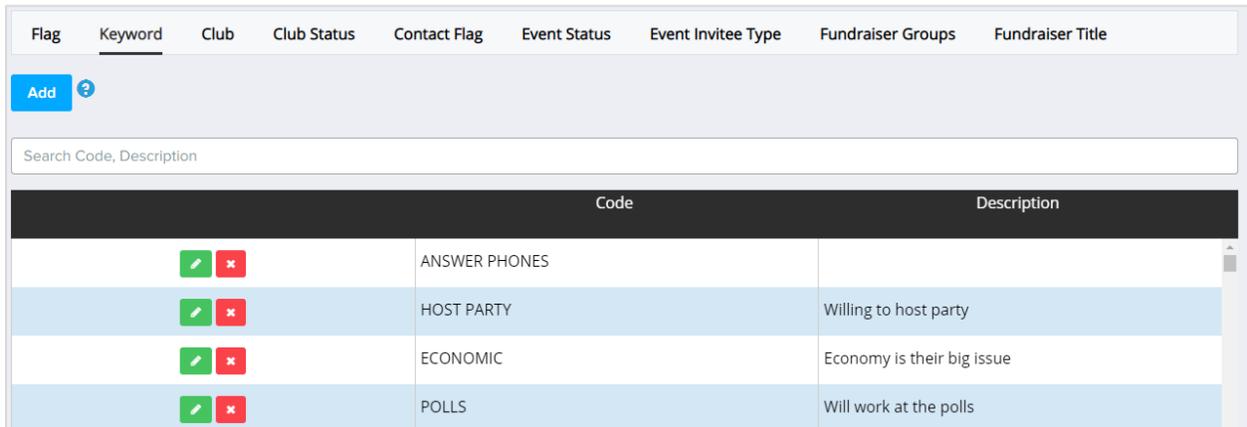


Keywords are useful in organizing your **People** records and categorizing them in easily searchable groups. Keywords are often used to track coalitions, issues, and to list source and volunteer activities.

### Creating and Editing Keywords

- To create a new custom keyword or view existing keywords, click **Settings** on the **Main Menu** and then select **People** or select **Settings** from the **People Dashboard**. Select the **Keyword** tab from the top of the screen. A list of your existing keywords will appear along with the total number.



	Code	Description
 	ANSWER PHONES	
 	HOST PARTY	Willing to host party
 	ECONOMIC	Economy is their big issue
 	POLLS	Will work at the polls

- To search for certain keywords, type search variables into the **Search Bar**. The search variables may appear in the **Code** or **Description** sections.
- To view and edit a keyword click the  button to the left of the keyword you are trying to edit/view.
- To delete a keyword, click the  button to the left of the keyword you're trying to delete. A confirmation message will appear asking, "Are you sure to delete?" Click **Yes** to delete the keyword permanently or **No** to cancel.

**\*\*Please note:** You cannot delete a keyword that's currently being used in Crimson. In order to delete any keywords, you'll have to confirm that it is not in use for any records first.

- To create a new keyword, click the  button and a new **Keyword - Add** window will appear.

- Enter a **Keyword Code** of up to 30 characters that will help you remember its significance (Ex: DOOR TO DOOR or HOST PARTY).
- Enter the full **Description** for the keyword.
- Click the **Save** button when you have completed the **Code** and **Description** fields. You may click the **Cancel** button at any time to exit the **Add Keyword** window.

## Using Keywords in a People Record

Within a **People** record, keyword information is displayed in the **Flags & Keywords** panel at the top of the profile. If there are keywords attached to the record, there will be a list of up to five keywords with a number of how many more are tagged to this profile. To see more, click on the panel and the profile will show a panel summary of flags and keywords. Select the keyword tab to see the keyword overview.

- In this view you can search assigned and available keywords, use the arrows to move a selected keywords from “Available” to “Assigned” and vice versa. Next to each keyword, you can see the description and the date it was added to the record.
- To create a new keyword in Crimson and add it to the record, click the  button and begin typing the new keyword in the field. Once done, press the  button to create and add the keyword. This will create a new keyword that can be used for the entire database.

You can also use the Mass Append function to assign flags to multiple people records at once. For more information, please see the [Mass Append – Flag, Keyword, Notes, Events and Tasks](#) guide.

## Searching with Keywords

When searching for **People** records, you may search for all records with one or more keywords under the **Group** section.

The screenshot shows the 'People Search' interface. At the top, there is a search bar labeled 'Quick People Search' with a magnifying glass icon and a 'Filters' icon. Below the search bar, there are tabs for 'Filters', 'Output Fields', and 'Result'. The 'Filters' tab is active, showing a grid of filter cards. The 'Group' filter is selected, and the 'Keyword' filter is highlighted in blue. The 'Keyword' filter contains the text 'Answers phones, polls'. Other filters include 'Non-Donor', 'People Code', 'People Type', 'Industry', 'Top Flag', 'Flag', 'Flag Date', 'Having All Flags', 'Event Code', 'Event Status', 'Club', 'Club Status', and 'Club Renewal Date'. At the bottom right, there are buttons for 'Save', 'Saved Searches', 'Recent Searches', 'Reset', and 'Run'.

You may also use keywords to hide certain records when searching by entering those keywords you wish to exclude under the **Suppression** section. You can search for general keywords or you can search “Supp: Having All Keywords” which will suppress results that have all the listed keywords in the field.

The screenshot shows the 'People Search' interface with the 'Suppression' filter selected. The 'Suppression' filter is highlighted in blue and contains the text 'Answer phones, polls'. Other filters include 'Apply Channel Suppression Flags', 'Supp: Flag', 'Supp: Having All Flags', 'Supp: Keyword', 'Supp: Having All Keywords', 'Supp: Event Code', 'Supp: Total # of Gifts', 'Supp: Cumulative Total', 'Supp: Inception Date', 'Supp: Inception Gift', 'Supp: Most Recent Gift Date', and 'Supp: Most Recent Gift'. At the bottom right, there are buttons for 'Save', 'Saved Searches', 'Recent Searches', 'Reset', and 'Run'.

For more detailed information on searching and using the Suppression functionality, please see [Crimson 3: People Search](#) solution.