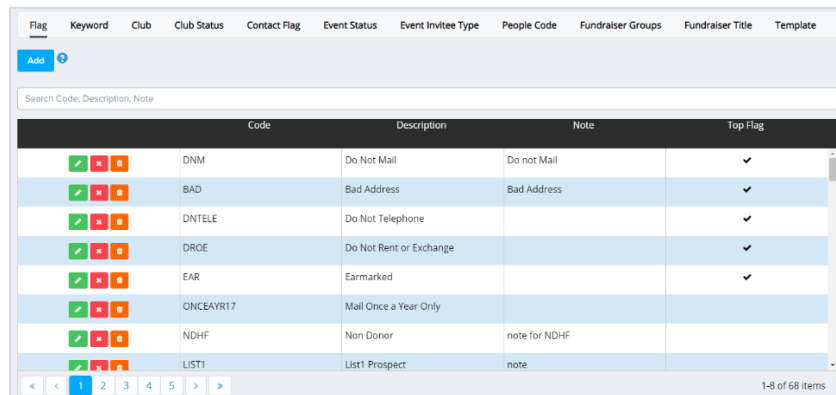




Flags are useful in organizing your **People** records and categorizing them in easily searchable groups. Crimson automatically creates a few common flags, but you can create flags as needed at any time.

Creating and Editing Flags

To create a new custom flag or view existing flags, go to **Settings** under the **Main Menu** and click **People** or you can access the **People Settings** in the **People Dashboard**. Under the **Flag** tab, a list of your existing flags will appear along with the total number of flags you have.



Code	Description	Note	Top Flag
DNM	Do Not Mail	Do not Mail	✓
BAD	Bad Address	Bad Address	✓
DNTELE	Do Not Telephone		✓
DRDE	Do Not Rent or Exchange		✓
EAR	Earmarked		✓
ONCEAYR17	Mail Once a Year Only		
NDHF	Non Donor	note for NDHF	
LIST1	List1 Prospect	note	

- To search for certain flags, type search criteria into the **Search Bar**.
- To view and edit a flag, click the  button to the left of the flag for edit.
- To delete a flag, click the  button. A confirmation message will appear asking, “Are you sure to delete?” Click **Yes** to delete the flag permanently or **No** to cancel.

****Please note:** You cannot delete a flag that is currently being used in Crimson. In order to delete any flags, you’ll have to confirm that it is not in use under any people records first.

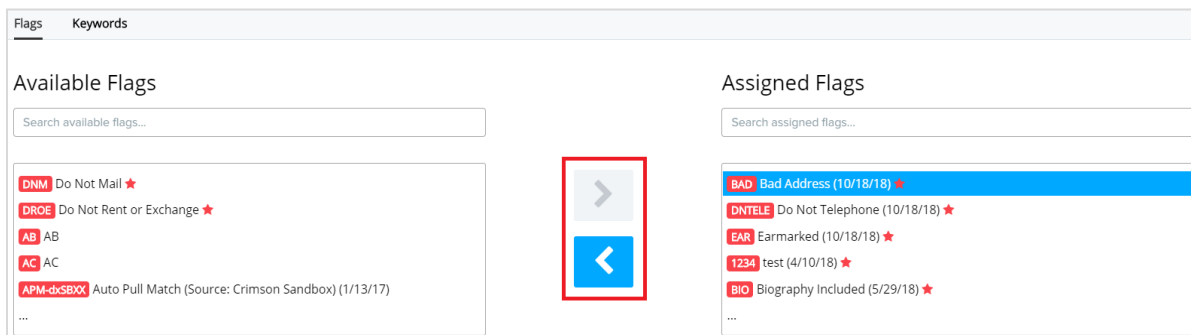
- To create a new flag, click the  button and a new **Add Flag** window will appear.



- Enter a **Flag Code** of up to 10 characters that will help you remember its significance (Ex. “DNM” for Do Not Mail or “ONCEAYR” to Send Mail Only One Time per Year).
- Enter the full **Description** for the flag.
- Use the optional **Note** field to provide more details about the flag or directions for its use.
- Check the **Top Flag** checkbox to prioritize the flag to the top of the Flag Menu when applied to a People Record and establish the **Priority** for the Top Flag. For more information, please refer to the [How to Create Top Flags FAQ](#) on the HelpDesk.
- Check the **Channel Suppression Flag** checkbox and select at least one target channel (**Email, SMS, Phone, or Direct Mail**) if you want to apply this flag as a suppression flag when using the [Advanced Export by Channel](#) feature or when generating a **People Search, Thank You list, or Best Efforts**. For more information, please refer to the [How to Use Mass Flag Suppression in List Selects](#) on the HelpDesk.
- Click **Save Changes** when you have completed the **Flag Code, Description, and Note** fields.
- You may click **Cancel** at any time to exit the **Flag - Add** window and not save the flag.

Using Flags in a People Record

Within a **People** record, flag information is located in the **Flag & Keywords** panel. The panel will show up to five flags and the number of additional flags there are under the record.



- To view the list of existing flags, click on the **Flag & Keywords** panel, select the **Flags** tab in the panel summary to see **Available Flags** versus **Assigned Flags**. Under Assigned Flags, each flag’s **Code** and **Description** will appear along with the date the flag was added to the record.
- To add a new flag to a record, select the flag from the **Available Flags** list and then click the right arrow. To remove a flag, select it from the **Assigned Flags** list and click the left arrow.

You can also use the **Mass Append** function to assign flags to multiple people records at once. For more information, please see the [Crimson 3: Mass Append - Flag, Keyword, Notes, Events, and Tasks](#) guide.

Searching with Flags

When searching for **People** records, you may search for all records with one or more flags under the **Group** section. You may also specify a date or range of dates for when the flags were added and search for records with a specific group of flags with the **Having All Flags** filter.

Profile Contact **Group** Giving Summary Gifts Giving Aggregate Giving Aggregate (Supp) Suppression

Non-Donor

People Code
Enter People Record Code
Choose a People Code

People Type
Enter People Record Type
Choose a People Type

Industry
Choose a Industry

Top Flag

Flag
Starts with

Flag Date
(Specify)

Having All Flags
In list of

Keyword
Starts with

Having All Keywords
In list of

Event Code
Starts with

Event Status
Starts with

Club
Starts with

Club Status
Starts with

Club Renewal Date
(Specify)

Save Saved Searches Recent Searches Reset Run

You may also use flags to omit certain records when searching by entering those flags you wish to exclude under the **Suppression** section.

Profile Contact Group Giving Summary Gifts Giving Aggregate Giving Aggregate (Supp) **Suppression**

Apply Channel Suppression Flags

Supp: Flag
Starts with

Supp: Having All Flags
In list of

Supp: Keyword
Starts with

Supp: Having All Keywords
In list of

Supp: Event Code
Starts with

Supp: Total # of Gifts
Equal to

Supp: Cumulative Total
Equal to

Supp: Inception Date
First Gift
(Specify)

Supp: Inception Gift
First Gift
Equal to

Supp: Most Recent Gift Date
Last Gift Date
(Specify)

Supp: Most Recent Gift
Last Gift
Equal to

Save Saved Searches Recent Searches Reset Run

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