






Crimson 3 FAQ – How to Link an Event to a Source Code

In Crimson, **Event Codes** can be used to help manage event details and invitees. **Event Codes** are applied at the **People Record** level, whereas **Source Codes** are applied at the **gift** level to help identify where money is coming in from. The two codes can be linked together to help enhance event tracking.

How to Link an Event to a New Source Code via the Event

1. Navigate to the **Event Dashboard**.
 2. To view events that need a source code, click the **Events Not Linked to A Source Code** red card. This will generate a list of events that do not have a source code linked.
 3. Add and link a new source code to an event from this view by clicking the  button next to that event.
 4. In the **Manage Event** window, click . In the window that appears, you can create a **Source Code** and add cost, date, and quantity details. When you are done, click .
- If the event is related to a Direct Mail piece, there is a **Mail Data** section available to be completed with the **Cost Per Piece** information available from your Direct Mail vendor. This information will allow Crimson to enhance the performance tracking of your event, resulting in additional reports available for analysis.

Add Source Code




List # Group List #

Code	Cost Details	Date	Quantity
Source Code <input type="text" value="EV001"/> Description <input type="text" value="Event 22"/> Initiative <input type="text" value="EVENT - EVENTS"/> ✘ Post \$ to Event <input type="text" value="EV001 - Announcement Dinner"/> ✘ <input type="button" value="Create Event"/>	<input type="checkbox"/> Apply costs to all codes in initiative Production Cost per Mailed <input type="text" value="\$ 0"/> List Cost per Mailed <input type="text" value="\$ 0"/> Cost per Response <input type="text" value="\$ 0"/> Postage Cost per Mailed <input type="text" value="\$ 0"/> One Time Flat Cost per Source <input type="text" value="\$ 0"/> Cost % of Raised (x Gross) <input type="text" value="0"/> %	<input type="checkbox"/> Apply mailed date to all codes in initiative Mailed date <input type="text"/> First Cage: <input type="text"/> Last Cage: <input type="text"/> Last Modified: <input type="text"/>	<input type="checkbox"/> This is a telemarketing code Number Mailed <input type="text" value="0"/> Number of Gifts: 0 Number of Donors: 0 Response Rate: %

How to Link an Event to a Source Code via Source Code Settings

****Please note:** The Event must exist in Crimson before attempting to link an Event Code to a Source Code under Money Settings.

1. Go to **Settings** on the left **Main Menu** and select **Money**. Then select the **Source** tab and a list of existing Source Codes will display.

2. Click  to create a new Source Code or click the  button next to a Source Code and then the  button in the new window to link an Event Code.



Source Code

EventVA1

Description

For events in Vermont


Initiative

EVENT - EVENTS

Post \$ to Event

EVT023 - Vermont pancake breakfast

Cancel Save Create Event

3. The Source Code must have a **Source Code** and **Description**. To link an event to the Source Code, start typing the **Event Code** or **Description** into the **Post \$ to Event** field, a drop-down will appear as you type, select the correct Event Code.
4. Click  when done making your edits.
5. Once saved, any money entered into the database with the Source Code will be tracked in all linked event areas.