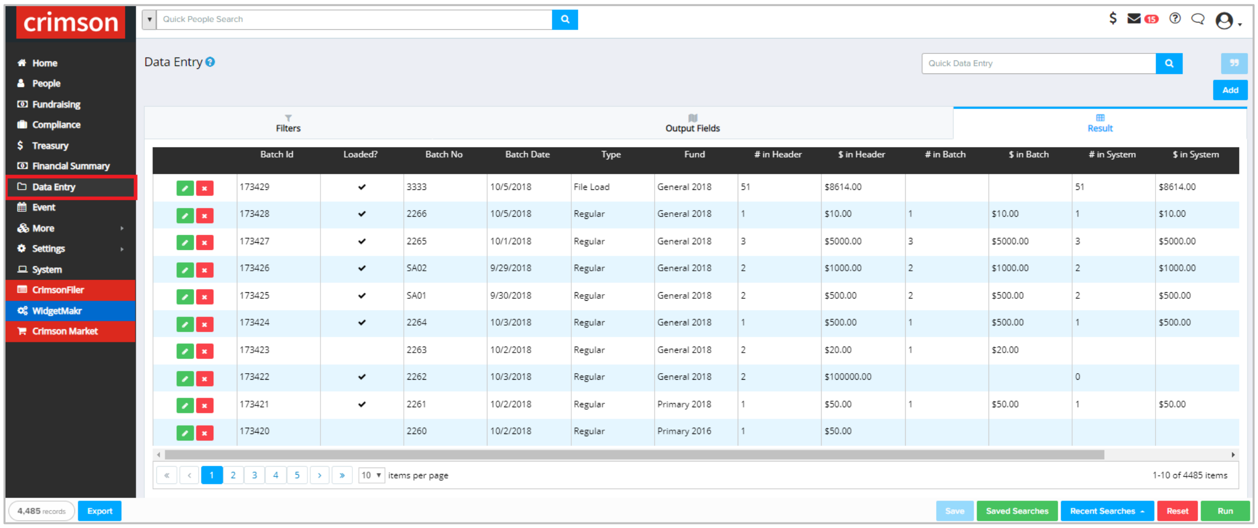
crimson³

Contributions – Data Entry

Data Entry is the process of adding contributions into the database through batches. We recommend reading the Batching and Caging Best Practices solution before beginning data entry.



Data Entry Menu

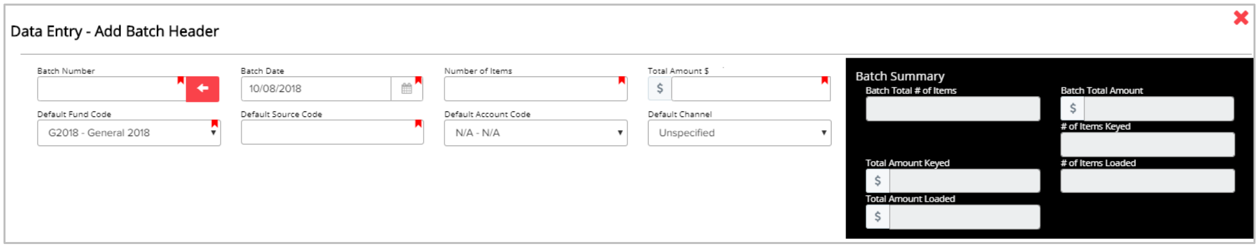
- Click on **Data Entry** on the **Main Menu** to manage existing batches and/or start a new batch.
- A list of the most recent batches will display by default.
- Use the **Filters** to find a specific batch or narrow down the batch results.
  - **Opened** – Shows all open, unloaded batches only.
  - **Balanced** – Shows all open, balanced batches that are potentially ready to load.
  - **Loaded** – Shows all loaded batches only.

  NOTE: **Quick Data Entry Search** at the top of Crimson can also be used to search for batches.
- To view/edit an existing batch, click next to the Batch #.
- To delete an existing batch (only if it contains no gifts), click next to the Batch #.
- Export the batches listed on the screen by clicking Export in the bottom left corner.

To learn more about the new search features and quick searches, see the **Crimson 3 – New Search Features** guide and **Crimson 3 – Quick Searches** guide on our HelpDesk.

Creating a New Batch

1. To create a new batch, click the Add button. A batch header will appear with the fields described below to be completed:

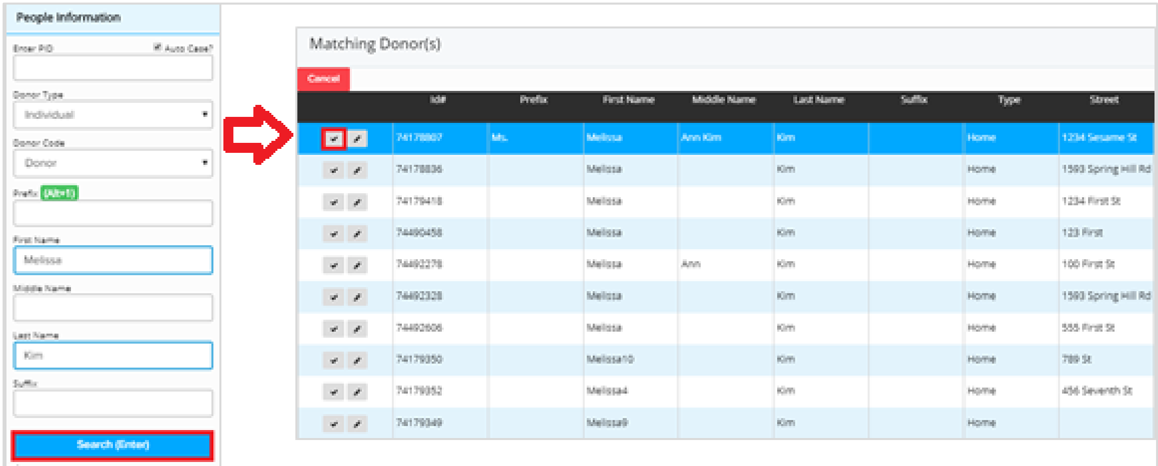


***Batch Number**	Enter the batch number to be assigned to all gifts in the batch. **NOTE**: Batch # is limited to 4 characters (alphanumeric) and the same batch # cannot be used more than once on a single date. For more information, see the **Crimson 3 FAQ: Batch Numbers**. Use the red arrow next to the Batch Number field to auto assign the next numeric batch #. The auto assigned numbers will start with 1001 and each time it is used, it will look at the last batch number and numerically add 1 to it.
***Batch Date**	Batch date is the gift date used in search outputs, FEC reports, and is the primary contribution date used in all reports. It is applied to all transactions in the batch.
***Number of Items**	Enter the number of contributions that will be loaded in this batch. A single check split between two donors should count as one gift. You can only load the batch when the number of items and total amount $ equal what is keyed.
***Total Amount $**	Enter the total dollar amount for all receipts you expect to enter into this batch.
***Default Fund Code**	Fund Code represents where the funds are going (ie. the election or committee). Each batch may use multiple Fund Codes, though only one will be listed as a default. Examples: P2020 (Primary 2020), G2020 (General 2020), etc.
***Default Source Code**	If an entire batch (or most of it) uses the same source code, select it as the default to save time and auto populate that code during data entry. Manually change it per contribution should it differ from the default.
Default Account Code	Track the bank account each gift is deposited into. This is not a required field.
Default Channel	Identify the channel a gift was received through. It can be used in addition to the Program, Initiative, and Source Codes, but is not a required field. (Ex: Web, Email, Phone Call, Private Meeting, etc.)

2. Once all batch header information have been entered, click Save, or click Cancel to clear the information entered.
3. Begin entering receipts into the batch. **NOTE**: all fields with an asterisk (*) are required fields.

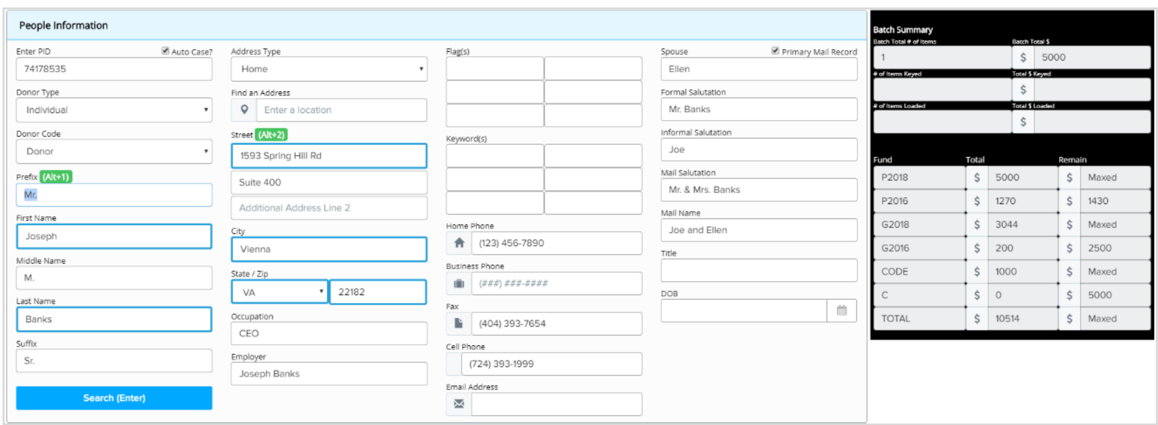
Entering Receipts for a Batch

1. After saving the batch header, click Enter Transaction to open the **Receipt Data Entry** window and start entering receipts.
2. Search for existing records in Crimson by using the **Enter PID** field or any of the blue bordered fields (First Name, Last Name, Street, City, State, and Zip). Then, click **Enter** on the keyboard or click the **Search** button. Select the donor from the results, by clicking the check button.

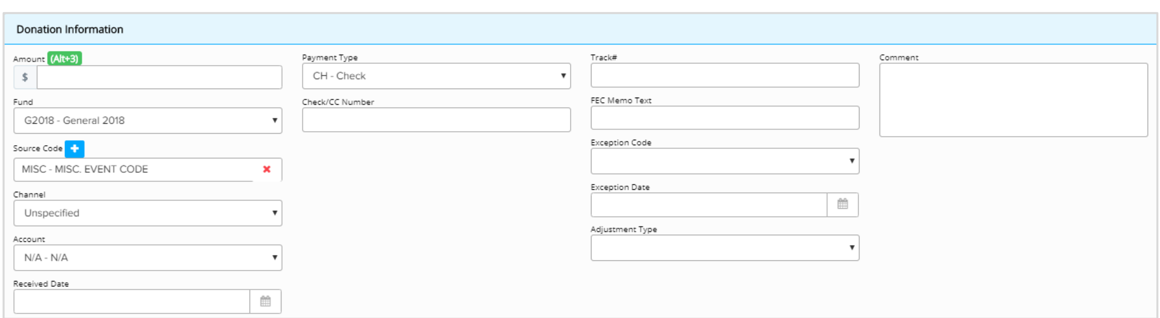


NOTE: When you enter new donor information in the blue bordered fields, Crimson will try to match it to existing records and will prompt you if any are found. If no match is found, the record will be saved as new.

3. Existing donors display a summary of receipt totals per **Fund** to the right of this screen. It will note how much they have available to give based on Fund Code limits or if they are maxed out.



4. Complete the receipt entry. See **Data Entry Fields** at the end of this guide for more details.



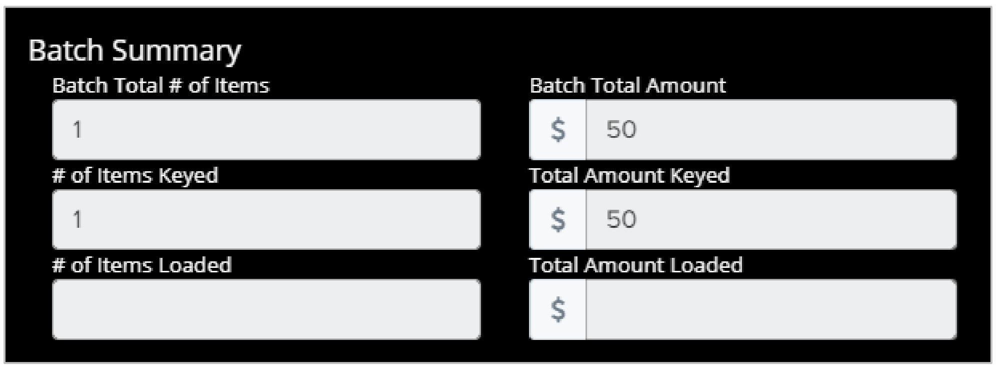
5. Save the receipt with one of two options:
   - Click **Save + Edit Record** to save the transaction to the batch and then open the people record to make updates to the profile

- Click **Save + Add $** to just add the transaction and continue to key in the next gift
- **NOTE**: click **Cancel** at any time to undo changes and close the data entry window.

6. Click the **Back** button at any time to return to the data entry screen or batch header.
7. Continue to enter receipts until the batch is completed. **NOTE:** a batch can be left open as needed. The batch details can only be seen from the open batch until it has been loaded.

Loading a Batch

1. The black **Batch Summary** box to the right tracks what has been entered so far in that batch. Once this is balanced with the **Batch Header**, the batch is complete and ready to be loaded.



2. When the batch is complete, the **Load Transactions** button will become active. If this button is grayed out, continue entering receipts until your batch is balanced or adjust the header accordingly.
3. Click the green pencil icon to the left of the receipt to edit a record before loading.
4. Once the batch is balanced, click **Load Transactions**.

Data Entry Fields

Below are the field options available when keying a contribution.

- Fields highlighted in **blue** can be used to search for existing donor records.
- Fields with an asterisk (*) are required.

People Information

Auto Case?	Auto Case is enabled by default. Uncheck the box to disable. Last used setting for this field will save for each subsequent receipt until the batch is exited.
Enter PID	Look up an existing donor's record using the unique Crimson PID.
***Donor Type**	Defaults to "Individual". Use the drop-down to change it to other types such as Multi-Candidate PAC, Candidate Campaign, etc.
***People Code**	Defaults to "Donor". Use the drop down to change it, if needed.
Prefix	Prefix field for an individual. Ex: Mr., Mrs., etc.

First Name	First Name field for an individual.
Middle Name	Middle Name field for an individual.
***Last Name/Org Name**	Doubles as the Last Name field for an individual or an Organization's Name field.
Suffix	Suffix field for an individual. Ex: Jr., Sr., etc.
Address Type	Defaults to "Home". Use the drop down to update it. Ex: "Business".
Find Address	Begin typing the address in this field to look up the standardized version of it or go directly to the Street field to manually complete all address fields.
Street	Street field, the first line of the address.
Address 1	Address 1, the second line of the address.
Address 2	Address 2, the third line of the address.
City	This is the City.
State	This is the State.
Zip Code	This is the Zip Code.
Occupation	Donor's Occupation.
Employer	Donor's Employer.
Flag(s)	Add up to 6 Flags. Start typing the Flag code and select it from the drop-down. See **People Settings** to add new Flags.
Keyword(s)	Add up to 6 Keywords. Start typing the Keyword code and select it from the drop-down. If that Keyword does not exist, the code you typed will be added as a new Keyword to Crimson when saved.
Home Phone	Donor's Home Phone number.
Business Phone	Donor's Business Phone number.
Fax	Donor's Fax number.
Cell Phone	Donor's Cell Phone number.
Email Address	Donor's primary Email Address.
Primary Mail Record	Enabled by default and can be used for house holding purposes.
Spouse	Spouse Name field.
Formal Salutations	This is 1 of 4 salutation fields available. The format of this field can be established by your organization. Ex: Mr. Banks.
Informal Salutations	This is 1 of 4 salutation fields available. The format of this field can be established by your organization. Ex: Joe.
Mail Salutations	This is 1 of 4 salutation fields available. The format of this field can be established by your organization. Ex: Mr. and Mrs. Banks.
Mail Name	This is 1 of 4 salutation fields available. The format of this field can be established by your organization. Ex: Joe and Ellen Banks.
Title	Used to describe the donor's title, not the same as using **Occupation**.
DOB	Enter or use the calendar selector for the donor's Date of Birth.

Donation Information

***Amount**	This is the contribution's amount. Enter the full amount received.
***Fund**	Also known as the election or committee code. Ex: P2020, G2020, PAC, etc.
***Source Code**	This is the **Source Code** telling you where the contribution came from.

Channel	Used to identify the channel a gift was received through. Can be used in addition to the Program, Initiative, and Source Codes, but is not a required field. Ex. Web, Email, Phone Call, Private Meeting, etc.
Account	Used to track the bank account each gift is deposited into. This is not a required field and the code will default to “N/A”.
Received Date	This is a secondary date field. Can be used as deposit date, etc.
Payment Type	Defaults to “CH - Check”. Can be changed using the drop-down menu. If any of the Credit Card options are selected you will see 4 additional fields including an option to **Process CC Now?** if credit card processing is enabled for the database.
Check/CC Number	Enter the check number or first 4/last 4 of the donor’s CC here. This is NOT where you enter a full CC for processing. See “**Process CC Now?**”.
Recurred end on/Monthly	Used to track recurring gift details. Setup future monthly recurring gift processing if the CC is processed in Crimson during data entry.
Process CC Now?	Available when CC processing is enabled. Contact CrimsonSupport@cmdi.com for more information. Click this button to open the CC processing fields.
Card Exp Date	Enter the Card Expiration Date here for CCs not processed in Crimson. Crimson will auto-fill this field when the database processes the card.
Approval Code	Enter the Card Approval Code here for CCs not processed in Crimson. Crimson will auto-fill this field when the database processes the card.
CC Transaction ID	Enter the Card CC Transaction ID here for CCs not processed in Crimson. Crimson will auto-fill this field when the database processes the card.
Track #	If Bundler Tracking is enabled, use this field to search and assign an existing bundler ID to the gift. Start typing the bundler’s Name or ID to look them up and then select the bundler from the drop-down menu.
FEC Memo Text	Use to create specific memo text that will appear on the FEC report.
Exception Code	Use the drop-down to apply Exception Codes. Depending on the exception code used, Crimson will automatically apply memo text to your entry on the FEC report. For more info, see **Crimson - Exception Codes** on our HelpDesk.
Exception Date	This is the exception code date associated with the code assigned.
Adjustment Type	Select **Split - Partial**, **Reattribution - Presumptive**, or **Redesignation - Partial** to apply an Adjustment from the drop-down menu. Follow the red text that appears on screen to complete the next portion of the adjustment. Crimson may auto apply memo text to your entry on the FEC report.
Comment	Use to save a comment for internal reference. This field will not pull on FEC reports.