

Follow the directions below to update a People Record by either using the **Quick Search** tool or the detailed **People Search** to look up and open a People record.

**Note:** If you are unsure how to use the search option, please see the [Crimson: People Search](#) from the Helpdesk.

A **People** record has many sections that can be updated.

People Search > People Profile

**Individual**

Occupation: CEO  
 Employer: Joseph Banks Service  
 Informal: Ellen Banks, Joe  
 Associate: Tina Johnson

**Flags & Keywords**

Flags: DNM, FAMILY, END, 1234  
 Keywords: Automobile, The Ivy, Restaurant, CBTOPPROF, 10394050, 26

**Giving History**

Cycle-to-Date: **\$8,044**  
 14 gifts  
 Most Recent: **\$44**  
 10/05/2018

**Tasks**

78 Outstanding

09/14/18 (Call to schedul...)  
 Call  
 10/03/20 (Max Out Request...)  
 Call

**Notes**

Aug 30, 2018  
 Met at golf  
 Apr 17, 2018  
 test 3  
 Mar 20, 2018  
 Test task

**Contacts**

4 Contacts  
 Benjamin Franklin  
 1600 Pennsylvania Ave NW  
 Washington, DC 20500  
 ben@1776.org

**History**

Oct 08, 2018  
 MONY - UPDATE  
 Oct 05, 2018  
 MONY - UPDATE  
 Oct 05, 2018  
 PHONE - UPDATE

**Events**

34 Events Invited To

10/09/2018 (EV-CRIMSON) Crimson Invited  
 12/08/2018 (120818EVT) DEC 8 18 Dinner Event Invited

**Pledge**

Total \$ Pledged: **\$20,119**  
 15 pledges  
 Outstanding: **\$17,169**  
 10 pledges

**Club**

8 Clubs  
 test 04/19/18

**Bundler Tracking**

Tracking #: **3018**  
 Loopye  
 Total Raised: **\$144**  
 7 gifts

**Conduit**

Conduit #: Total Raised

**Summary**

All-Time Total	By Year	By Fund		Spouse By Fund	
<b>\$12,327.41</b> <sup>85</sup>	<b>\$5,564</b> <sup>7</sup> YTD	<b>\$5,000</b> P2018 Maxed	<b>\$266</b> G2016 \$2,434 to Max	<b>\$1,150</b> P2018 \$1,550 to Max	<b>\$5,000</b> to Max
Summary \$100 \$44 5/20/13 10/5/18	<b>\$3,200</b> Last Year \$2,350 ↑	<b>\$1,204</b> P2016	<b>\$1,000</b> CODE	<b>\$85</b> P2016	

**Recent Gifts**

- MID 459164 • #3333 • 10/5/18 • \$44 • CC  
G2018 • Internet • WMKR
- MID 458779 • #C001 • 7/5/18 • \$66 • VM  
G2016 • Internet • CRIMSON
- MID 458781 • #C001 • 7/5/18 • \$44 • VM  
P2016 • Internet • CRIMSON
- MID 459082 • #1118 • 4/18/18 • \$400 • CH

[Add Gift](#) [Edit Full Record](#) [Copy Record](#) [Look up](#) [Print Call Sheets](#)

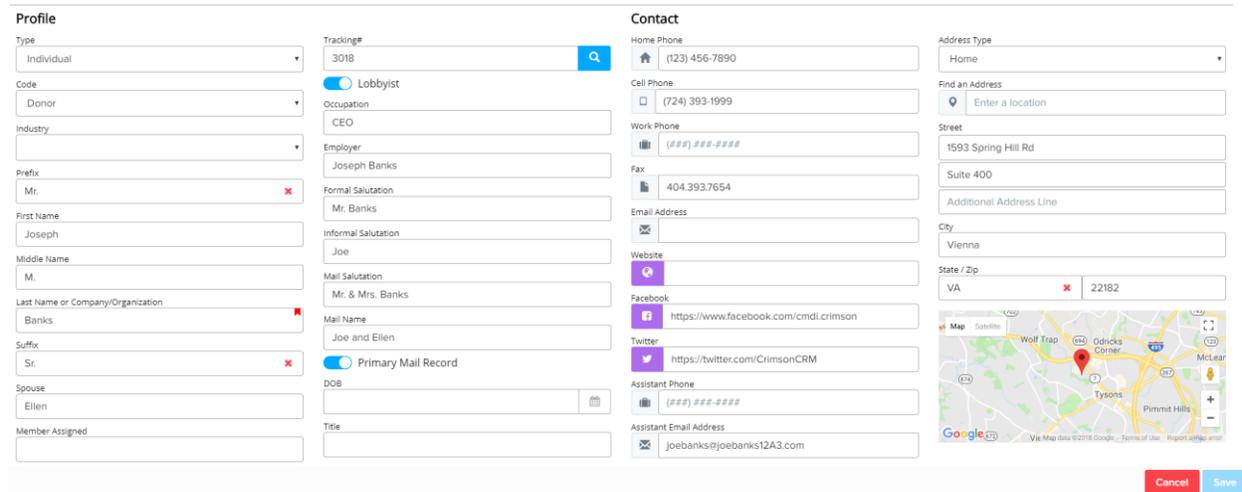
### Edit Most Fields



Click the **Edit Full Record** button at the bottom left of the screen.

## People

Mr. Joseph M. Banks, Sr. (PID: 74178535) 



The majority of fields will be open in a fully editable format, as displayed above. When you have made all appropriate changes, click the  button at the bottom of the screen. Click the  button and any edits you've made will be undone without saving. You can exit the screen by clicking on the X in the top right-hand corner.

## Phone and Address Book

Additional addresses, phone numbers and email information can be entered by clicking on the icons in the bottom right of the first panel. You can choose either the  or the  in order to **Add**, **Edit** or **Delete** an entry. You'll also be able to indicate which address or phone number is considered the Primary. The Primary record appears on the main donor screen and is included in outputs – including the FEC output where relevant.

## Picture

The **Photo** box in the top left hand corner of the screen allows you to view a photo attached to a record, add a photo if none exists or change the current photo. Put your cursor on the phot and click **Change** to locate a photo on your computer and load it.

**There are additional modules and fields accessible through the various panels on the top half of the record. If you click on a panel, a panel summary will appear on the bottom half of the record.**

## Gifts

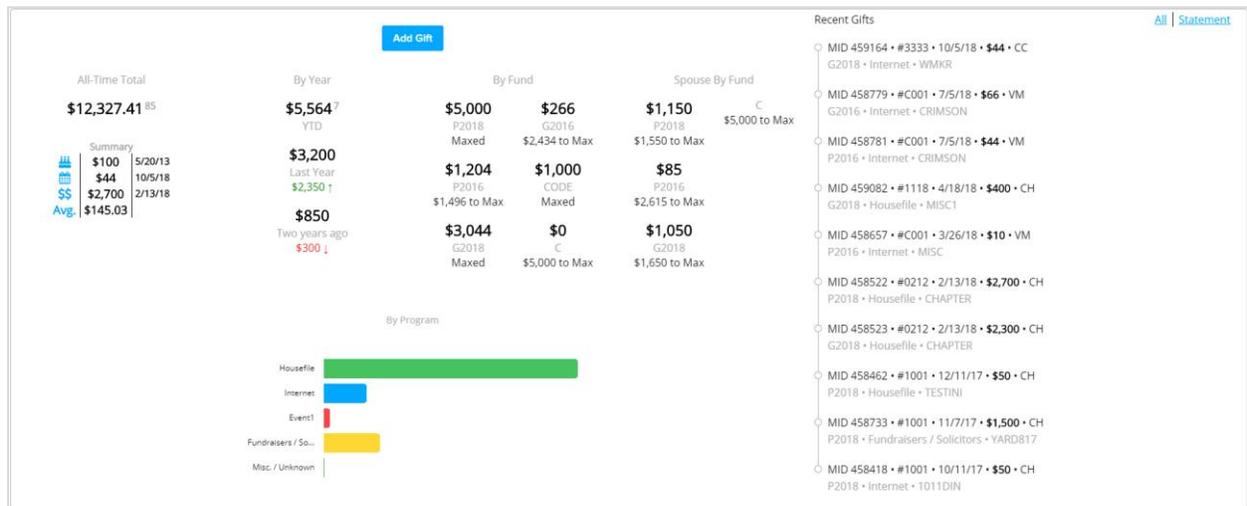
The **Gifts** panel shows a list of the donor's gifts to date. Click  in the panel or  in the panel summary to create a new gift, or highlight a gift in the **Recent Gifts** list by clicking it once to open it for viewing and editing.

The **Statement** option in the top right of the panel summary changes the viewing format of the list to display the full gift history, including adjustments.

## Pledges

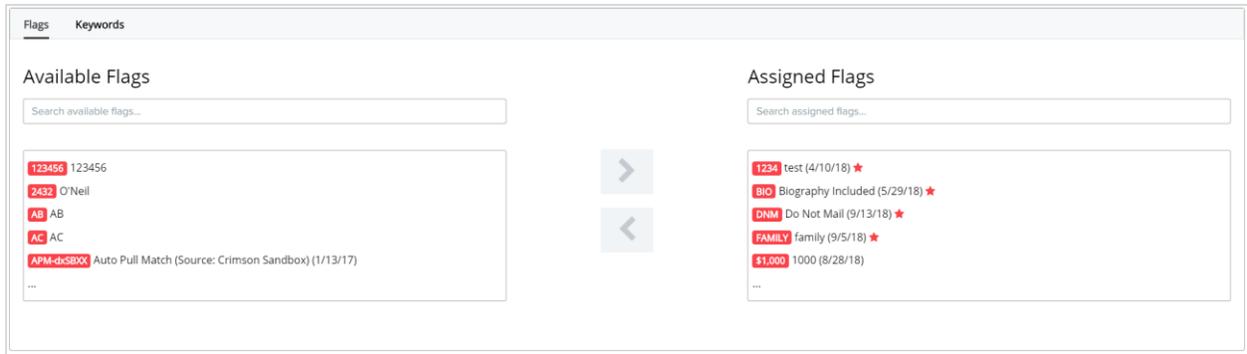
The **Pledges** panel allows you to monitor the statuses of any pledges the donor has made. The pledges will appear on a **Recent Pledges** list. To view all pledges, click **All** in the top right of the panel summary.

Click  in the panel or  in the panel summary to create a new pledge, or highlight a pledge by clicking the green icon to open it for viewing and editing. You can also click the red X to clear it from Crimson. More information about pledges can be found in the **Crimson: About Pledges** solution in the HelpDesk.



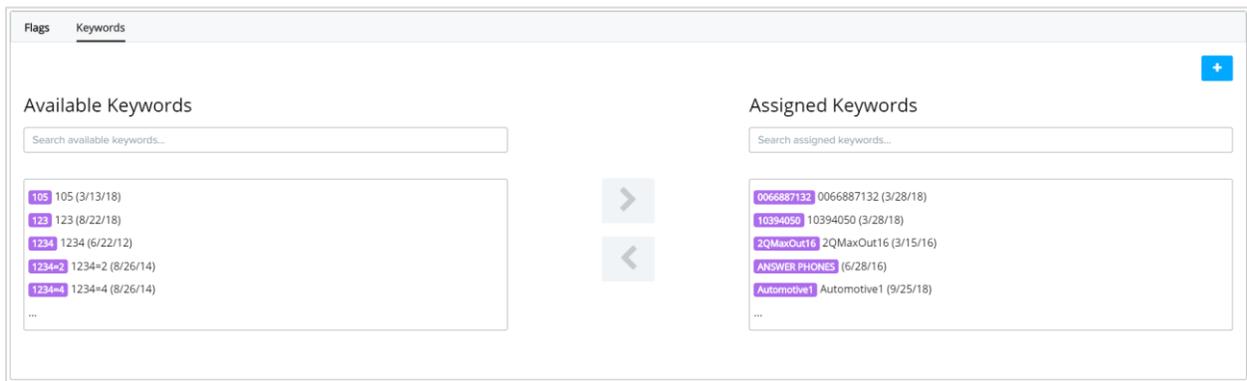
## Flags

The **Flags & Keywords** panel displays a list of flags attached to the record, and controls to manage flags. To add a new flag, click the desired flag in the **Available Flags** list in the panel summary and then click the right facing arrow. You can remove a flag in a similar manner by selecting the desired flag in the **Assigned Flags** panel summary and then click the left facing arrow.



## Keywords

The **Flags & Keywords** panel displays a list of keywords attached to the record, and controls to manage keywords. To select Keywords, click the **Keywords** tab. To add a new keyword, click the desired keyword in the **Available Keywords** list in the panel summary and then click the right facing arrow. You can remove a keyword in a similar manner by selecting the desired keyword in the **Assigned Keywords** panel summary and then click the left facing arrow.



**Note:** Please reference [Crimson: About Flags](#) and [Crimson: About Keywords](#) in the Helpdesk to learn how to create new flags and keywords in the library.

## Tasks

The **Task** panel displays a list of all the tasks to which the donor has been linked, with the same **Add**, **Open**, and **Delete** options. Click the checkbox marked **Include Completed** to change the view from pending tasks only to all tasks. See the **Crimson: About Tasks** HelpDesk file for more instruction on using tasks.

Done	Due	For	By	Type	Purpose	Priority	Subject	Note
<input checked="" type="checkbox"/>	10/3/2020	Sofia Amaya	Sofia Amaya	Call	Follow up	Med	Max Out Request	Thank them for their re
<input checked="" type="checkbox"/>	9/14/2018	Jack Blakely	Jack Blakely	Call	Follow up	Med	Call to schedule lunch	Call to set up lunch next
<input checked="" type="checkbox"/>	8/30/2018	Greg Andreyck	Jack Blakely	Call	Follow up	Med	Follow up on event	rrgrgr
<input checked="" type="checkbox"/>	6/14/2018	Melissa Kim	Jack Blakely	Call	Initial Contact	Med	Financial Pros_Rep	All financial industry
<input checked="" type="checkbox"/>	5/31/2018	Ryan Ferguson	Ryan Ferguson	Meeting	Follow up	Med	test 4	
<input checked="" type="checkbox"/>	5/14/2018	Junho Bae	Junho Bae	Call	Follow up	Med	Follow-up Call	
<input checked="" type="checkbox"/>	4/17/2018	Ryan Ferguson	Ryan Ferguson	Meeting	Follow up	Low	Test 1	
<input checked="" type="checkbox"/>	4/17/2018	Ryan Ferguson	Ryan Ferguson	Meeting	Demo	Med	Test 2	
<input checked="" type="checkbox"/>	1/24/2018	Jack Blakely	Jack Blakely	Call	Initial Contact		Prospecting calls	vrr
<input checked="" type="checkbox"/>	12/21/2017	Jack Blakely	Jack Blakely	Call	Initial Contact		CEO List	kjebhbknberkjner

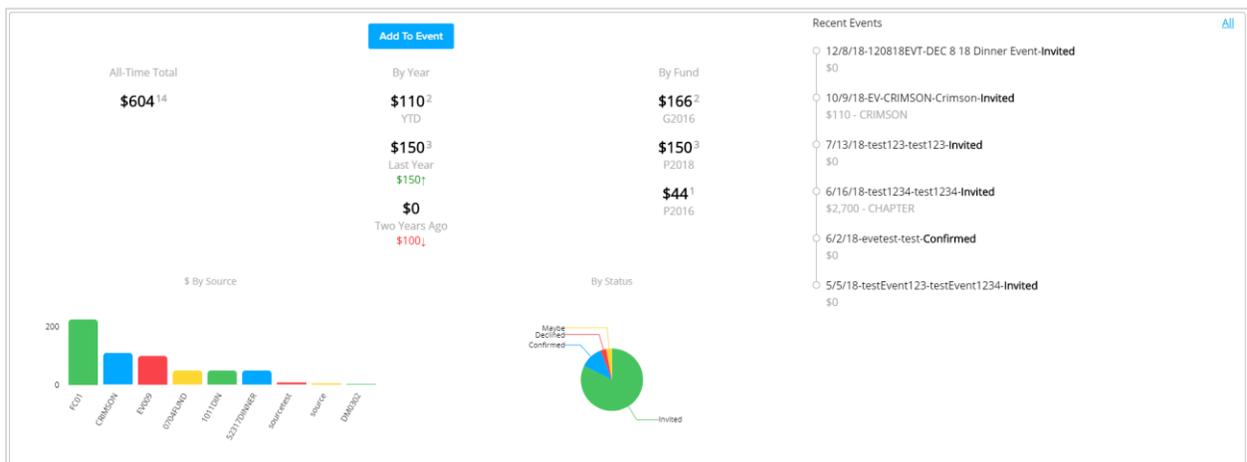
10 items per page 1-10 of 78 items

## Notes

The **Note** panel displays a list of notes about the donor. You can add, open, and delete notes as with pledges and gifts. Each note can have a subject, date, and note text body.

## Events

The **Events** panel displays a list of all the events to which the donor has been linked, with the same **Add**, **Open**, and **Delete** options. See the [Crimson 3: Events Features](#) helpdesk file for more instruction on using events.



## Contacts

The **Contacts** panel allows you to add contacts to a record, such as assistants who should be listed as the primary contact information, or contact people for a PAC. Click **Add Contact** to create a new contact, and a Contact window with fields for information like address, email, and phone number will appear for editing. Click the checkbox marked Primary once to make that contact the primary contact for the record.

The screenshot shows a grid of contact cards. Each card contains the following information:

- Name:** Ms. Elizabeth Jones
- Address:** 551 Lee Highway, Falls Church, VA 22046
- Phone:** 571.225.2225
- Email:** liz@abcdcorp.com
- Buttons:** Open (blue), Delete (red)

Other cards include:

- Ms. Elizabeth 123-456-7890 Jones** (Empty card)
- Mr. test tse** (Empty card)
- Mrs. Sofia Borden** (Address: 9330 Oglethorpe Dr., Groveland, FL 34736; Phone: 703.314.4666; Email: samaya@cmdi.com)
- Mrs. Sofia N. Amaya S.** (Address: 2152 Evans Court, Falls Church, VA 22202; Phone: 703.869.4455; Email: fia\_05@hotmail.com)
- Mr. Charles J. Rhodes** (Address: 7 Nearwater Lane, Annapolis, MD 21409 1105; Email: email74000496@email.com)
- Jennifer Smith** (Address: 2951 Grimes St, Greencastle, IN 46135 2278; Phone: 407.322.7390; Email: CATHRYNSMITH@EXCITE.COM)

## History

The **History** panel shows an itemized list of every change that has been made to the People file in Crimson since its creation. You can select a particular time period in the Period drop-down menu, select what kind of changes you would like to see (**Delete, Insert, Update, or All**) from the **Update Type** drop-down menu, or use the search bar. This feature allows you to view who made what updates when, and may help to understand new information, or allow you to make inquiries about changes to the Crimson users who made them.

The History panel interface includes the following elements:

- Period:** All (dropdown menu)
- Update Type:** All (dropdown menu)
- Search:** (text input field)
- Reset All:** (blue button)

The list of entries shows the following details:

- Oct 5 2018 10:35AM Rachel Bryant (MONY - UPDATE) TRACKNO (D=9876)
- Oct 5 2018 10:35AM Rachel Bryant (PHONE - UPDATE) PHNNO (123-456-7890-1234567890)
- Oct 5 2018 10:35AM Rachel Bryant (ADDRESS - INSERTION) (blank->New Address)
- Oct 5 2018 10:35AM Melissa Kim (PEOPLE UPDATE) cTITLE (Executive Assistant->blank)
- Oct 5 2018 10:35AM Chuck Logan (CONTACT - UPDATE) PRIME (1->0)
- Oct 5 2018 10:35AM Rachel Bryant (CONTACT - INSERTION) (blank->New Contact)
- Oct 3 2018 5:46PM (MONYALLOC - UPDATE) Excess\$ (200.00->0.00) | PACS (300.00->500.00)
- Oct 3 2018 5:45PM Rachel Bryant (ADDRESS - UPDATE) ADDRTYPE (H-B) | STREET (1116 W Broad St->1233 Test St.) | CITY (Falls Church->Test) | STATE (VA->CA) | ZIP (22046->12354) | PRIME (0->1)
- Oct 3 2018 5:38PM (MONY - UPDATE) ACKW (1->2) | ACKW (1->2)
- Oct 3 2018 5:21PM Rachel Bryant (KEYWORD - INSERTION) (blank->fy)

Showing 1 to 10 of 1470 entries [Previous](#) [Next](#)