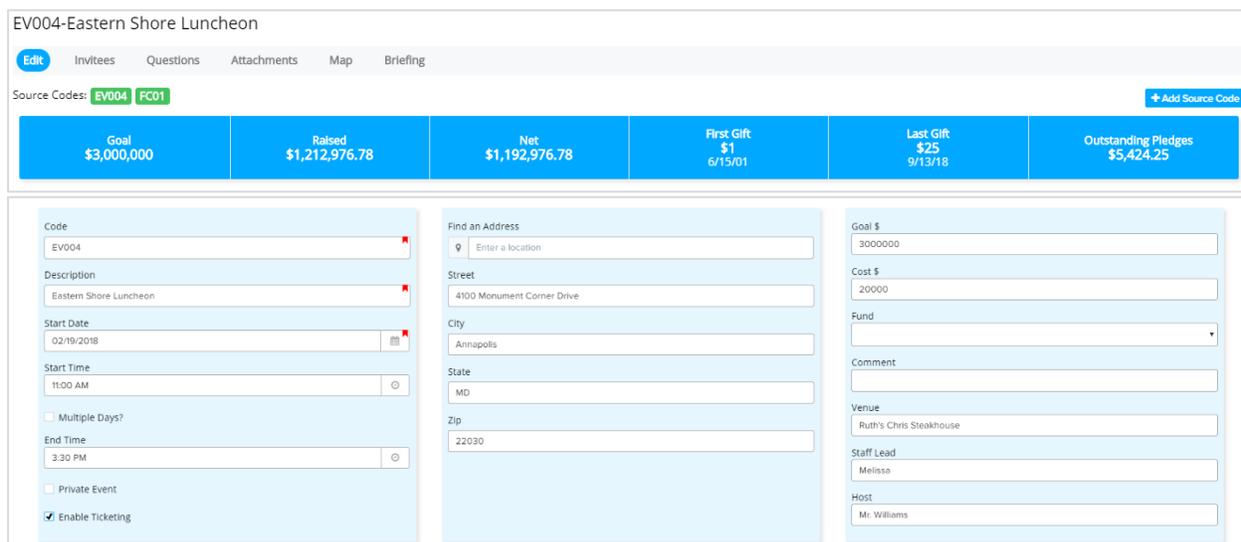


There are several new features and functionalities in Crimson 3's **Events Module** that allow users to manage their events and invitees easier as well as complete tasks at the actual event such as process credit cards and check invitees in.

To learn more about the **Event Dashboard**, see the [Crimson 3 – Event Dashboard](#) guide on our HelpDesk. Also, to learn more about the new search features and quick searches, see the [Crimson 3 – New Search Features](#) and [Crimson 3 – Quick Searches](#) guides on our HelpDesk.

Edit Event

- Once you have opened an existing event via the **Event Search** or the **Event Dashboard**, you can view and edit the event's details under the **Edit** tab. Please note, the 3 required fields for events are **Event Code**, **Description**, and **Start Date**.
- In order to have the summary information in the top blue bar be calculated for an event such as **Goal**, **Raised**, **Net**, **First Gift**, **Last Gift**, and **Outstanding Pledges**, at least one **Source Code** needs to be linked to the event.
- To add and link a new source code to an event, click the  button. If you want to link an existing source code to this event, you'll want to go to **Money Settings** to do that.



The screenshot shows the 'Edit' tab for event EV004-Eastern Shore Luncheon. At the top, there are navigation tabs: Edit, Invitees, Questions, Attachments, Map, and Briefing. Below the tabs, there are source codes: EV004 and FC01, and an '+ Add Source Code' button. A summary bar displays the following statistics:

Goal	Raised	Net	First Gift	Last Gift	Outstanding Pledges
\$3,000,000	\$1,212,976.78	\$1,192,976.78	\$1 6/15/01	\$25 9/13/18	\$5,424.25

Below the summary bar, there are three main sections for editing event details:

- Code:** EV004
- Description:** Eastern Shore Luncheon
- Start Date:** 02/19/2018
- Start Time:** 11:00 AM
- End Time:** 3:30 PM
- Multiple Days?
- Private Event
- Enable Ticketing

Find an Address:

- Street: 4100 Monument Corner Drive
- City: Annapolis
- State: MD
- Zip: 22030

Goal \$: 3000000

Cost \$: 20000

Fund: [Dropdown menu]

Comment: [Text area]

Venue: Ruth's Chris Steakhouse

Staff Lead: Melissa

Host: Mr. Williams

Ticketing

- When you check the **Enable Ticketing** checkbox in the **Edit** tab, you can then create different **Ticket Descriptions** with **Participation Levels** or amounts by clicking the  button.

Ticket Description	Participation Level	
VIP	\$1,000	
General	\$100	

- Once you have created tickets, they can then be assigned to **Invitees** when you **Process \$** so that the number of tickets per attendee can be tracked. The number of tickets an attendee has been assigned can be viewed in the record's **Edit Event Participation** page. Please note, that tickets can be assigned under **Process \$** whether the donor decides to **Pay Now (CC)** or **Pay Later (Pledge)**.

Edit Event Participation

Mr. Joseph Banks (74157837) 2/19/18 - EV004 - Eastern Shore Luncheon

[Edit](#) [Questions](#) [Payments](#) [Guests](#)

2 VIP tickets

2 General tickets

[Process \\$](#) [Check In](#)

Status: Confirmed

RSVP: 10/03/2017

Comment: Local Business Owners

Table #: 5

Invitee Type: VIP

Invitees

EVWT01-First Event Vermont

[Edit](#) [Invitees](#) [Questions](#) [Attachments](#) [Map](#) [Briefing](#)

[D Mobile Version](#) [Import Invitees](#) [Add Invitee](#)

Change Status: Check In: Search Invitees and Guests

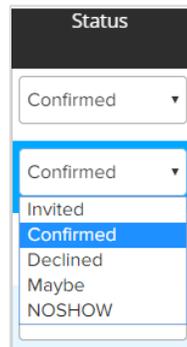
[Update Selected](#)

Status: Type: Checked In: CTD Greater Than/Equal To:

	P / I / D	RSVP On	Updated On	Status	Type	Name	Address	Phone (H)	Phone (W)	Phone (C)	Email						
			Process \$	Check In		74492630		10/2/18	Invited		Bug (Ms.), June B.	2115 Baneberry Drive Palm Bay, FL 32908			(111) 111-1115		\$0
			Process \$	Check In		74492632		10/2/18	Invited		Changing America PAC	1108 Massachusetts Ave Ste 400 Arlington, VA 20546			(111) 111-1117		contact@changinga \$0
			Process \$	Check In		74000814		10/1/18	Invited		Figuroa (Mr.), Rachel	172 82nd Street Prescott, AZ 86305					email74000814@er \$0
			Process \$	Check In		74492631		10/2/18	Invited		Kennedy (Dr.), Amelia	1593 Spring Hill Rd Suite 400 Palm Bay, FL 32908			(111) 111-1116		kennedy@hopkins \$0
			Process \$	Check In		74492628		10/2/18	Invited		Republican National Organization	1233 Test St. Test, CA 20546			(111) 111-1113		roger@rno.com \$0
			Process \$	Check In		74492627		10/2/18	Invited		Saving America PAC	100 N. Broadway Avenue Suite 2400 Mentor, NC 20546			(111) 111-1112		support@savingam \$0
			Process \$	Check In		74492625		10/2/18	Invited		Walker (Mrs.), Sally S.	321 E Cole Avenue	(111) 111-1111				\$0

[Print Call Sheets](#) [Mail Merge](#) [Export](#)

- In order to help you manage your invitees easier, a mass update functionality has been added where you can **Change Status** or **Check In** multiple invitees instead of having to update their information one at a time. You need to check the checkboxes for each invitee you want to update or you can check the checkbox at the left corner of the black header section to select all invitees and then click the **Update Selected** button.
- Use the **Quick Search** bar in the **Invitees** section or the **Status, Type, Checked In, or CTD Greater Than/Equal To** search filters to find particular invitees or guests.
- Click the  button to edit the record's **Event Participation** for this particular event, click the  button to open the invitee's people record, or click the  button to remove the invitee from the event.
- Click the  button to process a credit card for the invitee now or create a pledge for the invitee for this event. For more information about the **Process \$** feature in **Events**, please see below. Click the  button to mark the invitee as checked in to the event.
- To quickly update an invitee's **Status**, open the drop-down menu and select the new status from the available options. Once selected, that invitee's status will automatically be updated.



To learn more about the Events' Mobile Version, see the [Crimson 3 – Events Mobile Version](#) guide on our HelpDesk.

Process \$

- When you click the  button, you can view summary details for the invitee, contact information, the **Ticketing** options, and the option for the invitee to **Pay Now (CC)** or **Pay Later (Pledge)**.
- Under the summary details for the invitee, you will be able to see if the invitee already has any tickets assigned to them for this event.

- When you use the **Ticketing** feature, it will automatically calculate the **Amount** according to the number of tickets you choose to purchase, but you can manually change that amount if the invitee chooses to donate on top of their ticket purchases. Please note, that tickets can be assigned under **Process \$** whether the donor decides to **Pay Now (CC)** or **Pay Later (Pledge)**.
- Once you've completed the fields in the **Pay Now (CC)** section and checked the **Disclaimer** checkbox, click the **Enter Payment** button to enter the credit card information and process the payment.

The screenshot shows a donor profile for Mr. Joseph Banks. The profile includes a photo, name, PID (74157837), and contact information. It also shows his donation history: Donated: \$10,050, Pledged: \$2,200, and CTD: \$39,614.64. Below the profile, there are two ticketing options: VIP (Total: \$1,000) and General (Total: \$100). The interface is split into two tabs: "Pay Now (CC)" and "Pay Later (Pledge)". The "Pay Now (CC)" tab is active, showing fields for Donation Type (One Time @ Monthly), Amount (\$), Fund Code (P2016), Source Code (EV004 - Eastern Shore Luncheon), Track#, and Comment. A disclaimer checkbox is checked, and the "Enter Payment" button is visible at the bottom right.

- If the invitee chooses to pledge instead, select **Pay Later (Pledge)**, complete the pledge fields and click the **Save** button.

The screenshot shows the "Pay Later (Pledge)" form. It is divided into three main sections: "Pledge Amount", "Received In-House", and "Tracking". The "Pledge Amount" section includes fields for Pledge Amount (\$ 1100), Pledge Date (11/02/2018), Expect Date, Fund Code, and Source Code (EV004 - Eastern Shore Luncheon). The "Received In-House" section includes fields for Date and Amount (\$). The "Tracking" section includes a field for Track# and a balance of 0. A blue button labeled "+Add Fundraiser" is located below the Tracking section.

Radius Search

Event ID	Event Name	Date	CTD	Highest Gift	Last Gift	Invited
EV007	Annapolis Lunch	9/1/11	\$969,144.82	\$100		
EV008	Chevy Chase Dinner	9/30/11	\$107,314	\$500		
EV009	Breakfast Event w/ Erlich	10/29/11	\$17,945	\$6,200	124	32

- Within the **Map** tab, on the bottom right side of the map, is a **Radius Search** feature that allows you to search [for People Records within up to 50 miles from the Event's location](#). You can filter by CTD Amount, Highest Gift Amount, Last Gift Amount, Last Gift Date, and/or Invite Type.
- The results of your search will populate the map [with all records in your database within the set radius that meet the criteria](#). Once complete, you can then either export your results to an Excel by clicking **Export**, or invite these records to your event by clicking **Invite**.

Briefing

- An **Event Briefing** can be created directly in Crimson and printed when needed. It includes the event's main details, **Contacts**, a **Timeline**, **Content** along with an image, and an **Invitees List**. The records listed in the **Invitees List** can be filtered to only show specific people.
- Please see the additional attachment for an example of an **Event Briefing PDF**.