

Attributes help you categorize People Records based on their involvement with your committee or campaign. For example, you can use Attributes to identify active/inactive Volunteers, Major Donors, Grassroots Organizers, and more. Attributes are completely customizable so that you can easily identify the correct label for each record in your database.

In Crimson, **Attributes** have two layers:

- **Attribute Category** – This tells the end user the nature of the attribute. For example:
 - Volunteer
 - Major Donor
 - Staff
- **Attribute** – This identifies the exact relationship of the People Record. For example
 - **Volunteer**
 - Events
 - Door Knocker

Setting up Attribute Codes

In order to organize your records, you must first create the attributes and the attribute categories. Note: **Crimson** does come with defaults, however, you can modify these as needed.











Click on the **People Dashboard** from the **Main Menu** on the left-hand side and then click the button in the top right of the **Navigation Bar** to open **People Settings**.


1. Select the **Attribute tab**.

- To easily see all **Attributes**, before viewing **Categories**, click [Show All Attributes](#). If the Attribute Category already exists, skip to Step 6 to add **Attributes**.

2. A list of existing **Attribute Categories** will appear so that you can view and manage. Click the **Add** button to setup a new Attribute Category.

Add		Show All Attributes	
Search Attribute Category			
	Attribute Category	Labeling	Note
 	Volunteer	Attribute and Category (e.g. I	
 	Prospect	Category - Attribute (e.g. Ma	
 	Major Donor	Category - Attribute (e.g. Ma	
 	Staff	Attribute Only (e.g. Staff)	

3. To add, fill out the **Attribute Category** and select a **Labeling** order.
4. Labeling will determine how the Attribute is displayed elsewhere in Crimson. For example, “Category – Attribute” will always put the Attribute Category first, followed by a hyphen and then the Attribute (**eg Volunteer – Phone Banking**).

5. Click **Save** when done.
6. Next, to add the **Attributes**, first select the respective **Category** by clicking .
7. Then click **Show Attributes** in the **Edit Attribute Category Window**.
8. Click **Add** and add the **Attribute Name** and Note, if desired:

Add Attribute

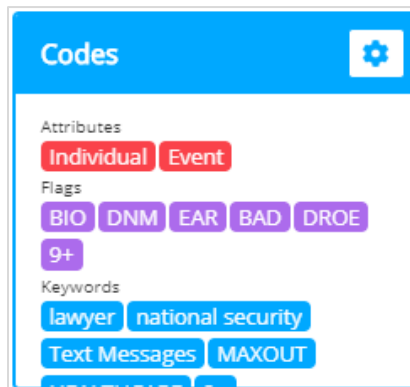
Attribute


Note

9. Click **Save** when done.

Assigning Attributes to People Records

When in a **People Profile**, you can assign **Attributes**, and other helpful codes. Simply click on the **Codes** panel box, and you will be defaulted to the **Attributes** tab.



- From here, select any of the available **Attributes** and use the  icon to assign it.
- Select from assigned **Attributes** and use the reverse arrow to remove an Attribute.
- The item in a green label is the attribute's **Category**.

Codes

Flags

Keywords

Attributes

Available Attributes

Prospect

 Donor

Major Donor

 Campaign

Major Donor

 Program

Major Donor

 Event

Assigned Attributes

Volunteer

 Event (4/6/20)

Major Donor

 Individual (8/12/20)

Recent Include Inactive [All](#)

- Volunteer - 4/6/20 - Present
- Event
- Major Donor - 8/12/18 - Present
- Individual

- Once an **Attribute** is assigned, it will be added to the **Recent** list on the right-hand side.
- Use the toggle to remove or include Inactive **Attributes**.
- To access the additional **Attribute** features, select the assigned Attribute from here.
- In the edit window, you can adjust the **Start** and **End Dates** by typing or using the calendar tool.
- The **Attribute** will default to **Active** or **Inactive** depending on if there is an End Date and if that date has passed. You can override this by clicking the toggle.

People Search > People Profile > [Edit Attribute People](#) ← Back ✕

Event Volunteer

Start Date
07/22/2020 📅

End Date
 📅

Active

- Lastly, to view all assigned **Attributes** in a list view, click **All** to the top right of the Recent list. From here, you can use the filters to sort, delete, or open one for editing.

People Search > People Profile > [Attribute People List](#) ← Back ✕

Attribute People

Category Date Active Only

▼ Hide Filters

	Attribute	Category	Start Date	End Date
✎ ✕	Event	Volunteer	7/22/20	
✎ ✕	Individual	Major Donor	7/21/20	

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Mass Append – People Search

You can use Crimson’s **Mass Append** feature to append Attributes to a set of People Search Results.

1. Run your desired People Search and then select **Mass Append** (next to **Export**).
2. From the new window, click the **Attribute** tab.

People Search > Mass Append ← Back ✖

Mass Append (16 records selected) ⓘ

Flag	Keyword	Note	Task	Event	Attribute
<div style="border: 1px solid #ccc; padding: 10px;"> <p>Attribute</p> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">Attribute Lookup ✖</div> <p>Start Date</p> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;"> <input type="text"/> 📅 ✖ </div> <p>End Date</p> <div style="border: 1px solid #ccc; padding: 2px;"> <input type="text"/> 📅 ✖ </div> </div>					
<div style="display: flex; justify-content: space-between; align-items: center;"> <div style="background-color: #333; color: white; padding: 5px; text-align: center;"> People Money Compliance </div> <div style="background-color: #444; color: white; padding: 5px; text-align: center; flex-grow: 1;"> Attribute Only (e.g. Staff) </div> </div>					
					Submit

3. From here, use the lookup tool to find the **Attributes**.

4. Enter the start and end dates, and when finished click Submit.

Import – New Contacts or New Gifts

When importing an Excel as part of a New Gift, New Contacts, or Append import, follow the same import process as you normally would for a **New Contacts** or **New Gifts** Import, but add the following columns to be able to import **Attribute** information:

- **Attribute Name** – Put the Attribute name here, just the name not the Category.
 - NOTE: The Attribute must exist in **People Settings** first to be able to import.
- **Attribute Start Date** – This is for the Start Date.
- **Attribute End Date** – This is for the End Date, not required.
- **Attribute Active** – Crimson will either assume based on date information, or you can use a Y for active or N for inactive.