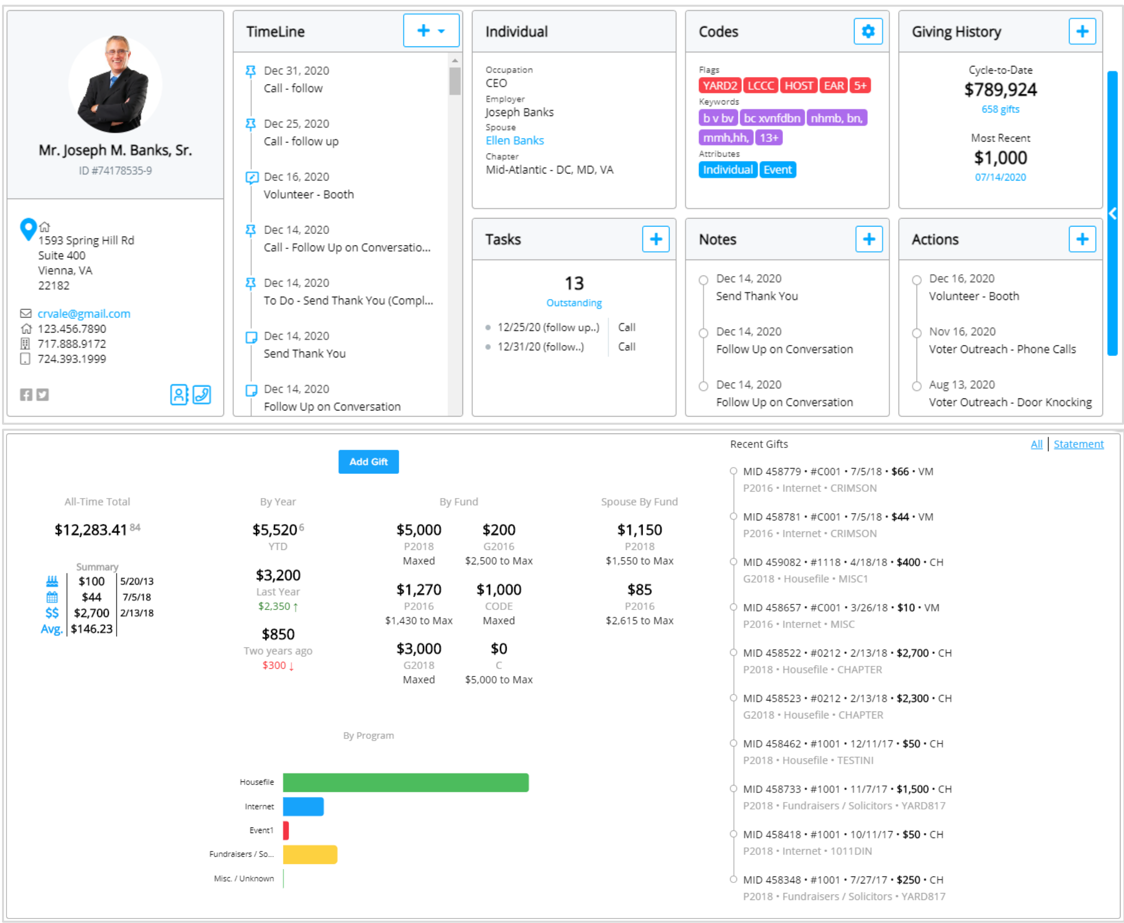
Crimson 3 – People Profile Panel Details

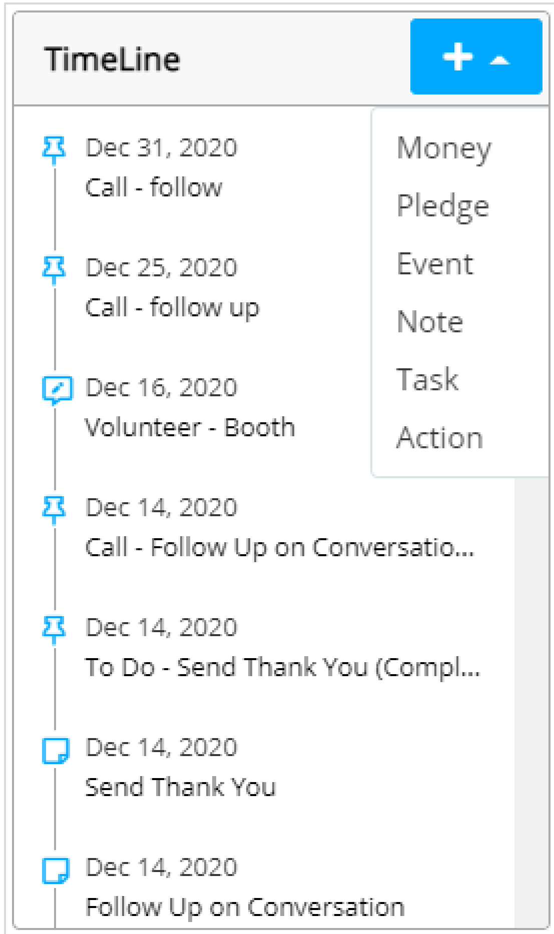
You can use the **Quick People Search** or full **People Search** to view and edit an existing People record. To learn more about the quick searches or new search features in Crimson 3, see the [Crimson 3 – Quick Searches]() guide or [Crimson 3 – New Search Features]() guide on our HelpDesk.

The **People Profile** in Crimson 3 segments data into separate panels and includes summary information in each. When a panel is selected, the lower half of the profile will display that panel's summary details and analytics as well as the list of the records that are being summarized.



Timeline

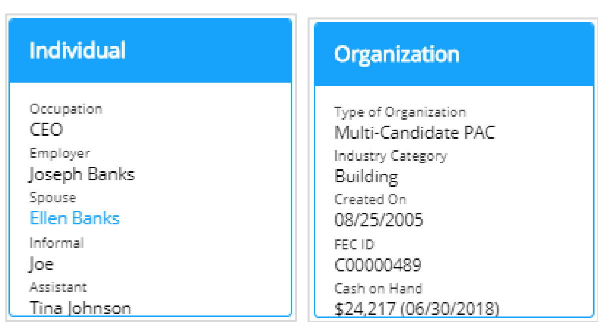
- The timeline will display a donor's recent history, showing items like Gifts, Event Participation, Tasks Assigned for that Donor, or Actions.

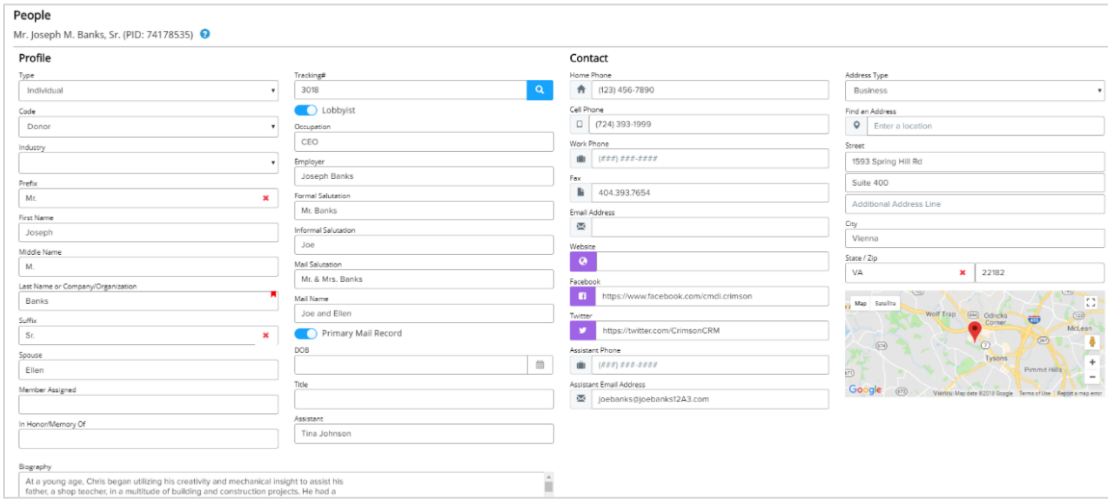


- Click the  icon to add a new item directly from the Panel. You can add a new Gift Record, Pledge, Event, Note, Task, or Action. You can click on any item within the timeline to access the edit page for the corresponding record.

Edit Most Fields

- Click the **Individual** or **Organization** panel to open the **Edit Record** screen. The information shown in these panels depends on the **People Type** selected for the record.





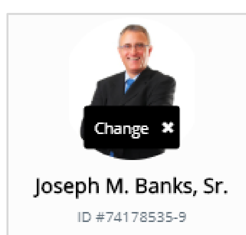
- The majority of the fields will open in a fully editable format as displayed above. When you have made all appropriate changes, click the **Save** button at the bottom right corner. Click the **Cancel** button to undo any changes made without saving. You can exit the **Edit Record** screen by clicking the red X at the top right corner.

Address and Phone Book

- Additional addresses, phone numbers, emails, and URLs can be added, edited, or deleted by clicking the  icon for the **Address Book** or  icon for the **Phone Book**. Once in the address or phone book, you can indicate which forms of contact information are the primary ones versus secondary. The primary contact information will appear on the main **People Profile** beneath the record's profile photo section and is the data that is included in outputs such as search results and FEC exports.

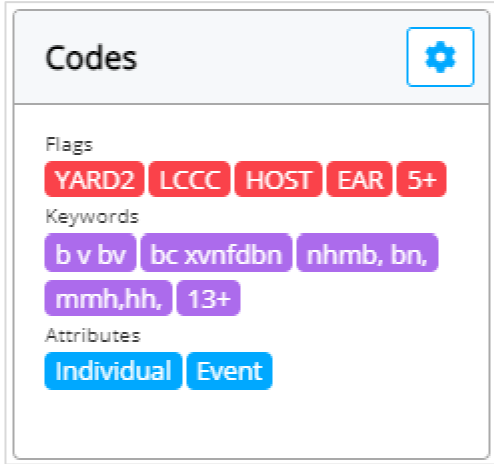
Picture

- Each profile allows you to save or attach a photo to the record. Click **Change** if you want to add or update the photo by selecting one from your computer or the X if you want to remove the image.



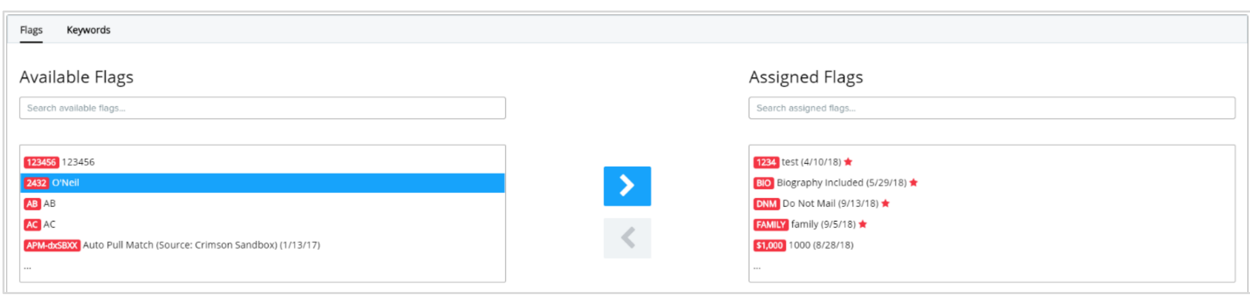
Codes

- In the Codes panel, 5 flags, 5 keywords, and 5 attributes are displayed. Your top Flags are listed first followed by your most recently added flags and then your most recently added Keywords are listed below, followed by your most recently added Attributes. After the most recent 5 codes are listed, a number such as “5+” will display how many additional flags, keywords, or attributes are attached to the record.



- Click the  button to create a new flag, keyword, or attribute in **People Settings**. Once you’ve created that new flag/keyword, you can press the **Back** button to go back into the people record and use that new code.

- When you click within the **Codes** panel, the lower half of the profile or **panel summary** will display a list of all available flags/keywords/attributes in your database and then all flags/keywords/attributes attached to this particular profile. You can select a flag/keyword/attribute from either side and press the arrows left or right to add or remove that code from the record. There are also quick searches available so you can easily find a particular flag/keyword/attribute without having to scroll through the lists.

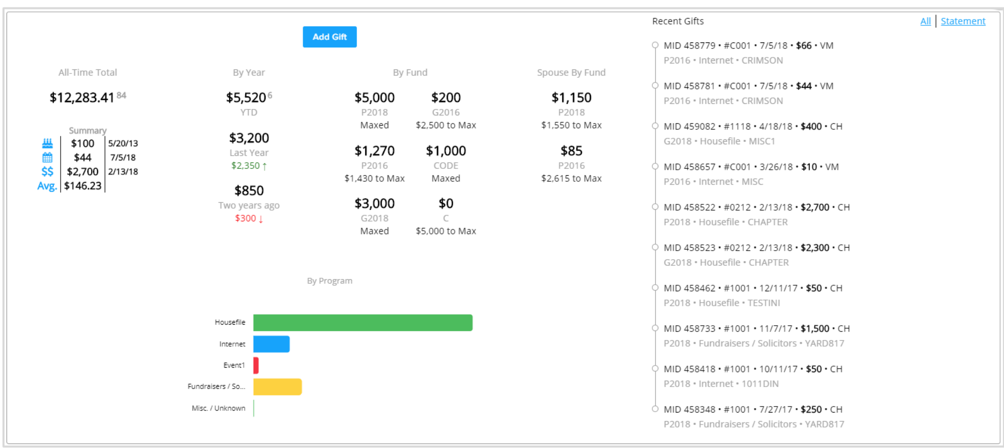


Giving History

- In the **Giving History** panel, you will see the **Cycle-to-Date** total with the number of gifts that equal that amount and the **Most Recent** contribution amount and date.

- Click the button to add a new gift under the people profile. Once you've added the contribution information in the new money screen, press the **Save** button. Press the **Cancel** button if you want to cancel the entry and not save the new information.

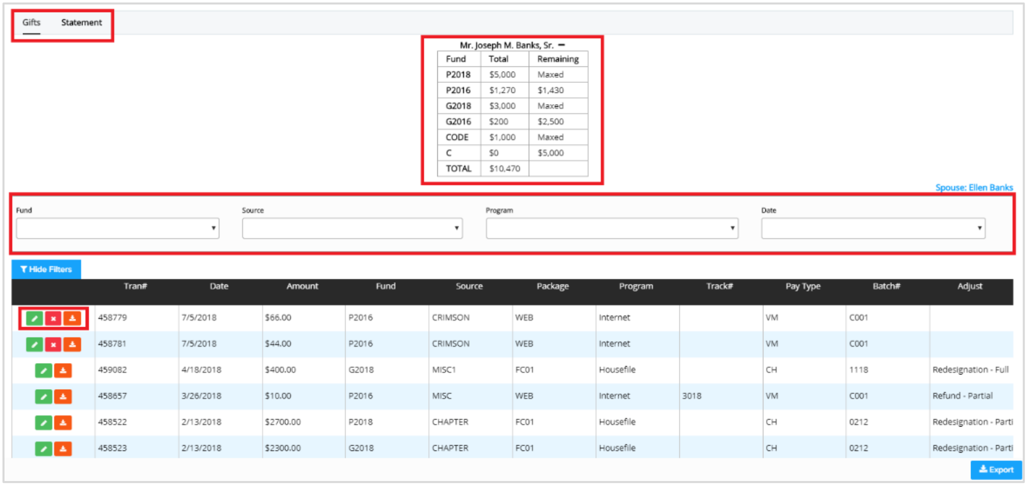
- When you click within the **Giving History** panel, the lower left side of the **panel summary** will display summary contribution data and analytics such as totals by fund, year, program, and the total a linked spouse has given to active fund codes while the right side of the **panel summary** will display a list of **Recent Gifts**.



- When you click a total amount in the left side of the **panel summary**, it will display a list of the contributions that make up that amount. For example, if you click the $3000 amount for G2018, it will display a list of all the individual contributions this donor gave to G2018 that equals the total amount of $3000.

- When you click a recent gift on the right side of the **panel summary**, it will open that contribution record so you can view and/or edit money details.

- Click **All** to see all live gifts or **Statement** to see gifts that may no longer be live along with the adjustments that have been applied such as refunds or chargebacks.



- When viewing all gifts in a people record, you will see a table that summarizes the totals that donor has given to active fund codes and how much they can still give before they are maxed out in the **Remaining** column.

- You can filter by **Fund** code, **Source** code, **Program** code, and/or **Date** in the **Gifts** view to specify which gifts you would like to view.

- You can filter by **Fund** code, **Adjustment Type**, **Batch Date**, and **Adjustment Date** in the **Statement** view to specify which gifts you would like to view.

- Click the button to view/edit a gift, click the button to delete a gift, or click the button to download a receipt. To add a new gift, click the Add Gift button. To export gifts to an Excel file, press the Export button.

Tasks

- In the **Tasks** panel, you will see a count of outstanding tasks and details for the 2 most current outstanding tasks.
- Click the button to add a new task under the people profile. Once you've added the details for the new task, press the **Save** button. Press the **Cancel** button if you want to cancel the entry and not save the new information. The 3 required fields in order to save a new task are: the **Subject**, **Type**, and **Purpose**.

- When you click within the **Tasks** panel, the lower **panel summary** will display all open tasks. Check the **Include Completed** checkbox if you want to view both open and completed tasks.

- Click the button to open and edit a task or click the button to delete a task. Click the Add Task button to add a new task.

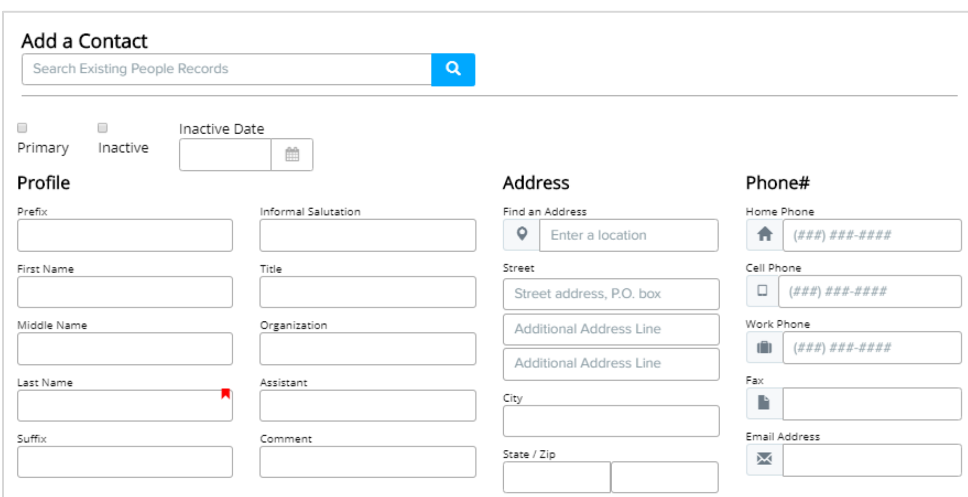
To learn more about Tasks, see the [Crimson 3 – About Tasks]() guide on our HelpDesk.

Notes

- In the **Notes** panel, you will see the most current 3 notes listed.
- Click the button to add a new note under the people profile. Once you've added the details for the new note, press the **Save** button. Press the **Cancel** button if you want to cancel the entry and not save the new information. The only required field in order to save a new note is the **Subject**.
- When you click the **Notes** panel, the lower **panel summary** will display all existing notes in this profile.
- Click the button to open and edit a note or click the button to delete a note. Click the Add Note button to add a new note.

Contacts

- In the **Contacts** panel, you will see the total number of contacts within this record as well as contact information for the primary contact.
- Click the button to add a new contact under the people profile. You can use the **Search Existing People Records** to search and add an existing people record as a contact or you can enter the contact information into the fields and click the **Save** button. Press the **Cancel** button if you want to cancel the entry and not save the information. The only required field in order to save a new contact is the **Last Name** field.



- When you click the **Contacts** panel, the lower **panel summary** will display all existing contacts in this profile.

- The **Primary** contact will be the record that you can search for in the **People Search** and the one that appears in the exported search results.
- Click the Open button to edit a contact or click the Delete button to delete a contact. Click the Add Contact button to add a new contact.

History

- In the **History** panel, you will see the 3 most recent updates to the profile listed.

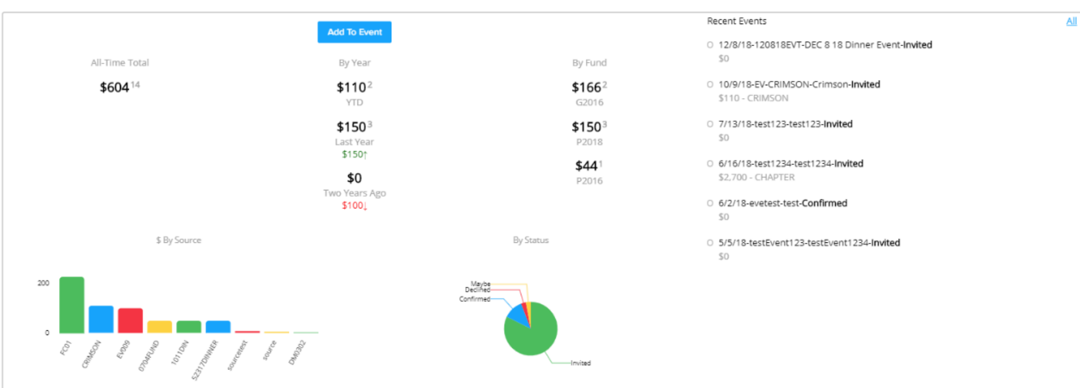
- When you click the **History** panel, the lower **panel summary** will display all historical changes that have occurred in the profile. You will see the date, time, user's information, table the change occurred on, update type, field name, the old value and then the new value.

- You can use the **Period** or **Update Type** filters to find a particular change or use the **Search**. Click the Reset All button to reset all filters.

Events

- In the **Events** panel, you will see the total number of events the record was invited to.
- Click the + button to add a people record as an invitee to an existing event. In order to add a record to an event, that event must already exist in the database. Search for the event by **Event Code** or **Event Description**, select the **Event Status** and click the **Save** button. The other fields available in the **Event Participation** screen are optional.

- When you click the **Events** panel, the lower **panel summary** will display summary event data and analytics such as totals by fund, year, all-time, a bar graph for linked source codes, and a pie chart of event statuses while the right side of the **panel summary** will display a list of **Recent Events**.



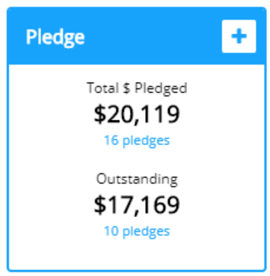
- When you click a recent event on the right side of the **panel summary**, it will open that event's participation details for that people record so you can view and/or edit the invitee's information.

- Click **All** to see a list of all events the record was invited to. You can use the **Search Events** bar to find a particular event, click the button to open/edit the record's event participation for an event, or click the button to delete that record from the event. Click the Add To Event button to add the record as an invitee to an existing event.

  To learn more about Events, see the [Crimson 3 – Event Dashboard]() or [Crimson 3 – New Events Features]() guides on our HelpDesk.

Pledge

- In the **Pledge** panel, you will see the total amount pledged with the number of pledges and the total outstanding amount pledged with the number of outstanding pledges for this people profile.



- Click the button to add a new pledge under the people profile. Complete the pledge fields and click the **Save** button or press the **Cancel** button if you want to cancel the entry and not save the information.

- If a contribution is added to this record with the same **Fund Code** and **Source Code** as an existing pledge, Crimson will automatically link it as a payment towards that pledge. Payments towards pledges can always be manually linked as well.

- When you click the **Pledge** panel, the lower **panel summary** will display summary pledge data and analytics such as totals by fund, year, source code, all-time, and bar graphs showing paid versus outstanding while the right side of the **panel summary** will display a list of **Recent Pledges**. Click the Add Pledge button to add a new pledge to the record.

- When you click a recent pledge on the right side of the **panel summary**, it will open that pledge's details so you can view and/or edit the pledge's information.

- Click **All** to see a list of all pledges. You can filter by **Fund**, **Source**, **Has** (**Has outstanding** or **Has payment),** and **Date** to specify which pledges you would like to view. Click the button to open/edit a pledge or click the button to delete a pledge.

Club

- In the **Club** panel, you will see the total number of clubs the people record belongs and clubs that have upcoming renewal dates.
- Click the button to add a new club under the people profile. Complete the club fields and click the **Save** button or press the **Cancel** button if you want to cancel the entry and not save the information.

- When you click the **Club** panel, the lower **panel summary** will display summary club data such as total active clubs, upcoming renewal dates, total primary clubs, total closed clubs, and lists of solicitors and candidates linked to particular clubs while the right side of the **panel summary** will display a list of all **Active Clubs**. If you want to see closed clubs too, click the **Include Closed Clubs** toggle. Click the Add Club button to add a new club to the record.

- When you click a recent club on the right side of the **panel summary**, it will open that club's details so that you can view and/or edit the club's details.

- Click **All** to see a list of all clubs. You can filter by **Primary**, **Active**, or **Closed** to specify which clubs you would like to view. Click the button to open/edit a club or click the button to delete a club.

Bundler Tracking

Advanced fundraising or **Bundler Tracking** in Crimson allows you to view all the gifts associated with a fundraiser and the fundraisers he/she has recruited via his/her people record.

The options below only apply to clients with advanced bundler settings enabled. Please contact Customer Support at CrimsonSupport@cmdi.com for more information and see the following guides on our HelpDesk: **Crimson 3 – Advanced Bundler Tracking**, **CrimsonRPM – Crimson Bundler Tracking with RPM**, **CrimsonRPM – Bundlers Guide to RPM**.

- In the **Bundler Tracking** panel, you will see the bundler's **tracking number**, whether they are a lobbyist, the total amount they raised, and the total number of gifts associated to their tracking number.

- Click the button if the people profile does not already have a **tracking number** and you want to add one.

- When you click the **Bundler Tracking** panel, the bundler details window will open where you can view summary bundler data and analytics such as the downlines, how much that fundraiser has raised per fund code, how much has been raised this year, last year, and two years ago.

- Click the **Edit** tab to view and/or make any updates to the bundler's information or click the **Fundraiser Group** tab to view and/or make any updates to the fundraising groups the bundler belongs to.

- Click the **Gift** tab to see all gifts that are linked to this bundler's tracking number. Click the  button to see the money details for a particular gift or click the Export button to export all of these gifts into an Excel file.

- Click the Print Downlines button to view and print the downlines' details.