



# 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.

**Mr. Joseph M. Banks, Sr.**  
ID #74178535-9

1593 Spring Hill Rd  
Suite 400  
Vienna, VA  
22182

crvale@gmail.com  
123.456.7890  
717.888.9172  
724.393.1999

**TimeLine**

- Dec 31, 2020  
Call - follow
- Dec 25, 2020  
Call - follow up
- Dec 16, 2020  
Volunteer - Booth
- Dec 14, 2020  
Call - Follow Up on Conversati...
- Dec 14, 2020  
To Do - Send Thank You (Compl...
- Dec 14, 2020  
Send Thank You
- Dec 14, 2020  
Follow Up on Conversation

**Individual**

Occupation  
CEO  
Employer  
Joseph Banks  
Spouse  
Ellen Banks  
Chapter  
Mid-Atlantic - DC, MD, VA

**Codes**

Flags: YARD2, LCCC, HOST, EAR, 5+  
Keywords: b v bv, bc, xmfdbn, nhmb, bn,  
mmh,hh, 13+  
Attributes: Individual, Event

**Giving History**

Cycle-to-Date  
**\$789,924**  
658 gifts  
Most Recent  
**\$1,000**  
07/14/2020

**Tasks**

13 Outstanding  
• 12/25/20 (follow up.) Call  
• 12/31/20 (follow.) Call

**Notes**

- Dec 14, 2020  
Send Thank You
- Dec 14, 2020  
Follow Up on Conversation
- Dec 14, 2020  
Follow Up on Conversation

**Actions**

- Dec 16, 2020  
Volunteer - Booth
- Nov 16, 2020  
Voter Outreach - Phone Calls
- Aug 13, 2020  
Voter Outreach - Door Knocking

**Summary**

All-Time Total: **\$12,283.41**<sup>84</sup>

Summary	By Year	By Fund	Spouse By Fund
<b>\$100</b> 5/20/13	<b>\$5,520</b> <sup>6</sup> YTD	<b>\$5,000</b> P2018 Maxed	<b>\$1,150</b> P2018
<b>\$44</b> 7/5/18	<b>\$3,200</b> Last Year	<b>\$200</b> G2016 Maxed \$2,500 to Max	<b>\$1,550</b> to Max
<b>\$2,700</b> 2/13/18	<b>\$2,350</b> ↑	<b>\$1,270</b> P2016 CODE Maxed	<b>\$85</b> P2016
<b>Avg. \$146.23</b>	<b>\$850</b> Two years ago	<b>\$3,000</b> G2018 Maxed	<b>\$2,615</b> to Max
	<b>\$300</b> ↓	<b>\$0</b> C Maxed \$5,000 to Max	

**By Program**

- Housefile
- Internet
- Event
- Fundraisers / So...
- Misc. / Unknown

**Recent Gifts**

- MID 458779 • #C001 • 7/5/18 • \$66 • VM P2016 • Internet • CRIMSON
- MID 458781 • #C001 • 7/5/18 • \$44 • VM P2016 • Internet • CRIMSON
- MID 459082 • #1118 • 4/18/18 • \$400 • CH G2018 • Housefile • MISC1
- MID 458657 • #C001 • 3/26/18 • \$10 • VM P2016 • Internet • MISC
- MID 458522 • #0212 • 2/13/18 • \$2,700 • CH P2018 • Housefile • CHAPTER
- MID 458523 • #0212 • 2/13/18 • \$2,300 • CH G2018 • Housefile • CHAPTER
- MID 458462 • #1001 • 12/11/17 • \$50 • CH P2018 • Housefile • TESTINI
- MID 458733 • #1001 • 11/7/17 • \$1,500 • CH P2018 • Fundraisers / Solicitors • YARD817
- MID 458418 • #1001 • 10/11/17 • \$50 • CH P2018 • Internet • 1011DIN
- MID 458348 • #1001 • 7/27/17 • \$250 • CH P2018 • Fundraisers / Solicitors • YARD817

## Timeline

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

**TimeLine** +

- Dec 31, 2020  
Call - follow
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Call - Follow Up on Conversatio...
- Dec 14, 2020  
To Do - Send Thank You (Compl...
- Dec 14, 2020  
Send Thank You
- Dec 14, 2020  
Follow Up on Conversation

Money  
Pledge  
Event  
Note  
Task  
Action

- 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.

Individual	Organization
Occupation CEO Employer Joseph Banks Spouse Ellen Banks Informal Joe Assistant Tina Johnson	Type of Organization Multi-Candidate PAC Industry Category Building Created On 08/25/2005 FEC ID C00000489 Cash on Hand \$24,217 (06/30/2018)

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

<b>Profile</b> Type: Individual Code: Donor Industry: [Dropdown] Prefix: Mr. First Name: Joseph Middle Name: M. Last Name or Company/Organization: Banks Suffix: Sr. Spouse: Ellen Member Assigned: [Dropdown] In Honor/Memory Of: [Dropdown]		Tracking# 3018 Lobbyist: <input checked="" type="checkbox"/> Occupation: CEO Employer: Joseph Banks Formal Salutation: Mr. Banks Informal Salutation: Joe Mail Salutation: Mr. & Mrs. Banks Mail Name: Joe and Ellen DOB: [Field] Title: [Field] Assistant: Tina Johnson		<b>Contact</b> Home Phone: (123) 456-7890 Call Phone: (724) 393-1999 Work Phone: (###) ###-#### Fax: 404.393.7654 Email Address: [Field] Website: [Field] Facebook: https://www.facebook.com/crmdl.crimson Twitter: https://twitter.com/CrimsonCRM Assistant Phone: (###) ###-#### Assistant Email Address: josebanks@joebanks1243.com		Address Type: Business Find an Address: [Field] Street: 1593 Spring Hill Rd Suite: 400 Additional Address Line: [Field] City: Vienna State / Zip: VA 22182 	
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**Biography**  
As a young age, Chris began utilizing his creativity and mechanical insight to assist his father, a shop teacher, in a multitude of building and construction projects. He had a

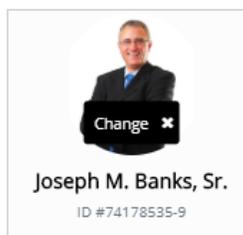
- The majority of the fields will open in a fully editable format as displayed above. When you have made all appropriate changes, click the **Save** button at the bottom right corner. Click the **Cancel** button to undo any changes made without saving. You can exit the **Edit Record** screen by clicking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

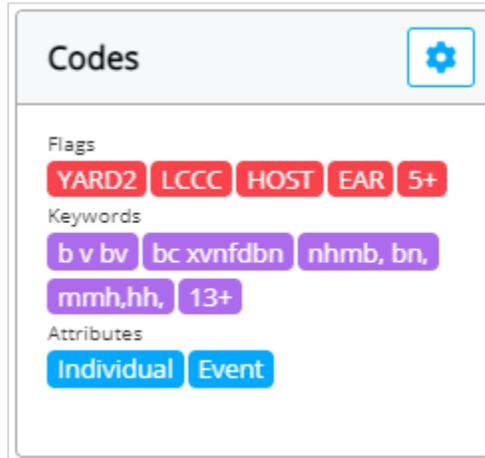
- Each profile allows you to save or attach a photo to the record. Click **Change** if you want to add or update the photo by selecting one from your computer or the X if you want to remove the image.



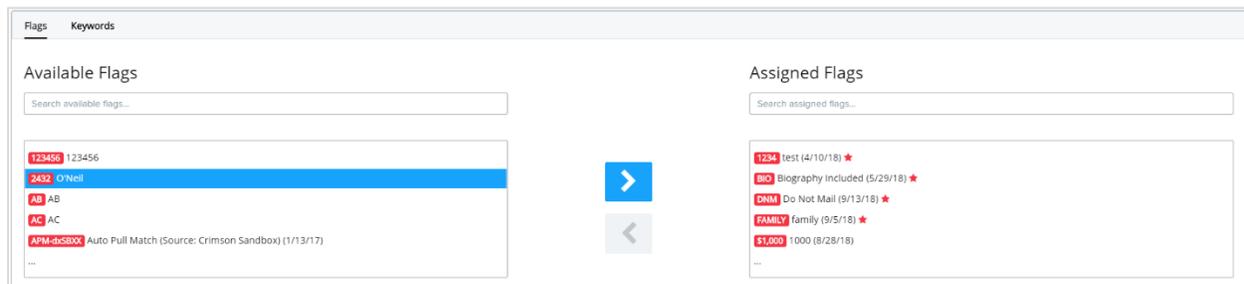
## Codes

- 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.

Giving History
+

Cycle-to-Date

**\$8,044**

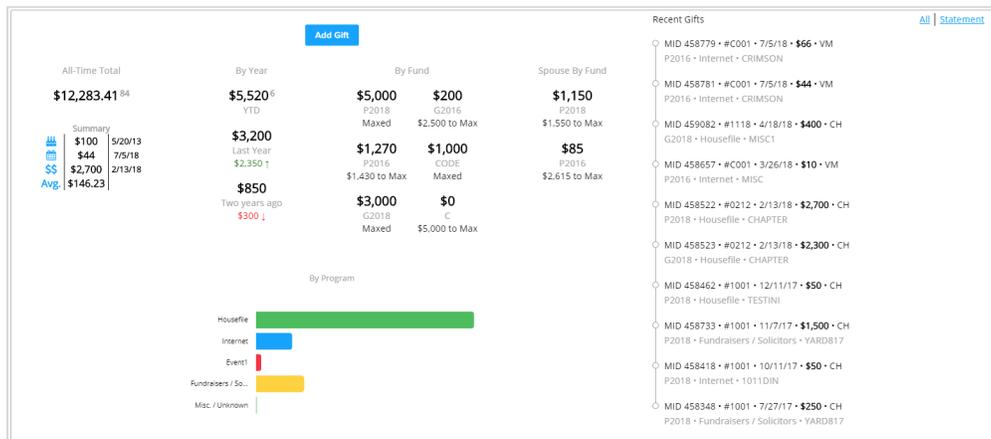
14 gifts

Most Recent

**\$44**

10/05/2018

- 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**.



The screenshot displays the 'Giving History' panel summary. On the left, there's an 'All-Time Total' of \$12,283.41 and a 'Summary' table with columns for amount and date. The 'By Year' section shows YTD of \$5,520 and Last Year of \$3,200. The 'By Fund' section shows totals for P2018, G2018, and P2016. The 'Spouse By Fund' section shows totals for P2018 and P2016. A 'By Program' bar chart shows Housefile as the largest category. On the right, a 'Recent Gifts' list shows individual contributions with details like ID, fund code, amount, and date.

- 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.

Gifts Statement

Mr. Joseph M. Banks, Sr. —

Fund	Total	Remaining
P2018	\$5,000	Maxed
P2016	\$1,270	\$1,430
G2018	\$3,000	Maxed
G2016	\$200	\$2,500
CODE	\$1,000	Maxed
C	\$0	\$5,000
<b>TOTAL</b>	<b>\$10,470</b>	

Spouse: Ellen Banks

Fund: \_\_\_\_\_ Source: \_\_\_\_\_ Program: \_\_\_\_\_ Date: \_\_\_\_\_

Hide Filters

Trans#	Date	Amount	Fund	Source	Package	Program	Track#	Pay Type	Batch#	Adjust
458779	7/5/2018	\$66.00	P2016	CRIMSON	WEB	Internet		VM	C001	
458781	7/5/2018	\$44.00	P2016	CRIMSON	WEB	Internet		VM	C001	
459082	4/18/2018	\$400.00	G2018	MISC1	FC01	Housefile		CH	1118	Redesignation - Full
458557	3/26/2018	\$10.00	P2016	MISC	WEB	Internet	3018	VM	C001	Refund - Partial
458522	2/13/2018	\$2700.00	P2018	CHAPTER	FC01	Housefile		CH	0212	Redesignation - Parti
458523	2/13/2018	\$2300.00	G2018	CHAPTER	FC01	Housefile		CH	0212	Redesignation - Parti

Export

- 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  button. To export gifts to an Excel file, press the  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  button to add a new task.

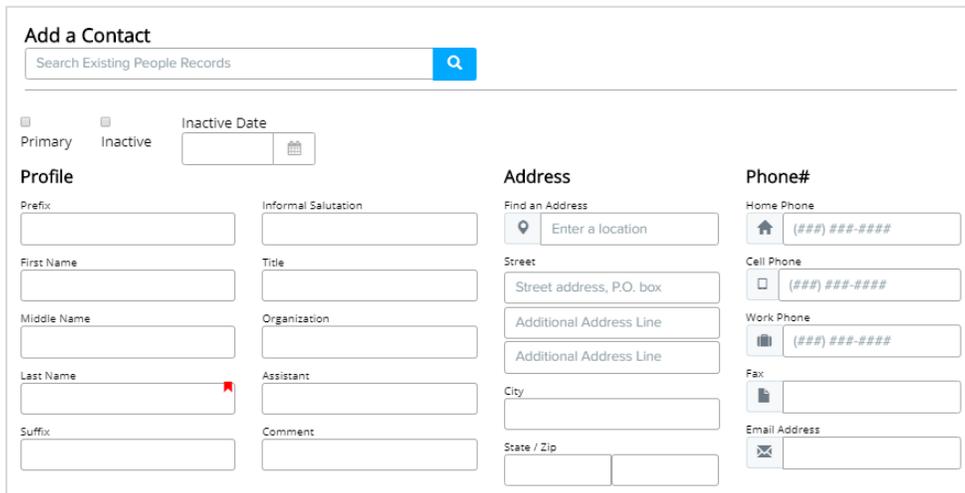
To learn more about Tasks, see the [Crimson 3 – About Tasks](#) guide on our HelpDesk.

## 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  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.

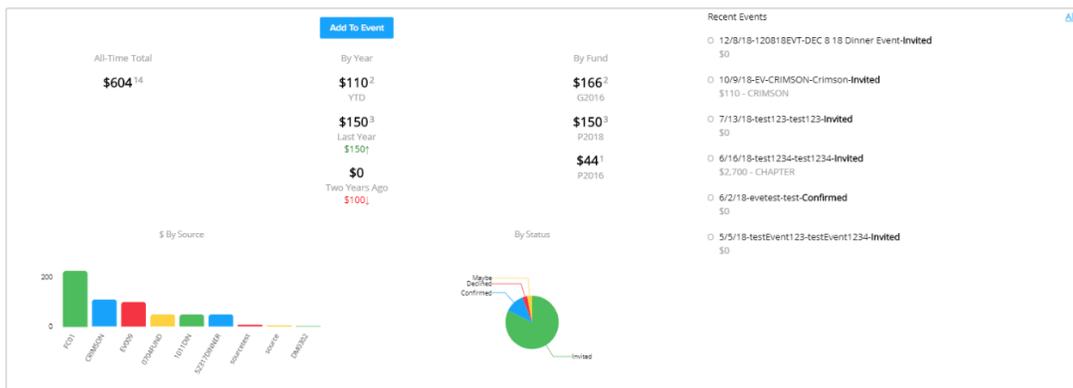
- The **Primary** contact will be the record that you can search for in the **People Search** and the one that appears in the exported search results.
- Click the  button to edit a contact or click the  button to delete a contact. Click the  button to add a new contact.

## 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  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**.



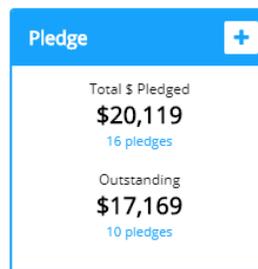
- When you click a recent event on the right side of the **panel summary**, it will open that event's participation details for that people record so you can view and/or edit the invitee's information.

- 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  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  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  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](mailto: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  button to export all of these gifts into an Excel file.
- Click the  button to view and print the downlines' details.