

You can use the **Quick People Search** or full **People Search** to find, view, and edit a 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 displays that panel's summary details and analytics as well as the list of the records that are being summarized.

Below shows how to edit a people record and the features in the **Giving History** panel. To learn more about all of the panels in a People Profile in detail, see the [Crimson 3 – People Profile Panels Details](#) guide on our HelpDesk.

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

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Vienna, VA
22182

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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 Conversatio...
- 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 xw nfdn nfmb, 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

Recent Gifts

All-Time Total	By Year	By Fund	Spouse By Fund
\$12,283.41 ⁸⁴	\$5,520 ⁶ YTD	\$5,000 P2018 Maxed	\$1,150 P2018 G2016 \$1,550 to Max
Summary	\$3,200 Last Year	\$1,270 P2016 \$1,430 to Max	\$85 P2016 CODE Maxed \$2,615 to Max
\$100 5/20/13	\$44 7/5/18	\$3,000 G2018 Maxed	
\$2,700 2/13/18	\$850 Two years ago	\$0 C \$5,000 to Max	
Avg. \$146.23	\$300 ↓		

By Program

- Housefile
- Internet
- Event1
- Fundraisers / So...
- Misc / Unknown

Recent Gifts List:

- 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

Edit a Record's Profile 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)

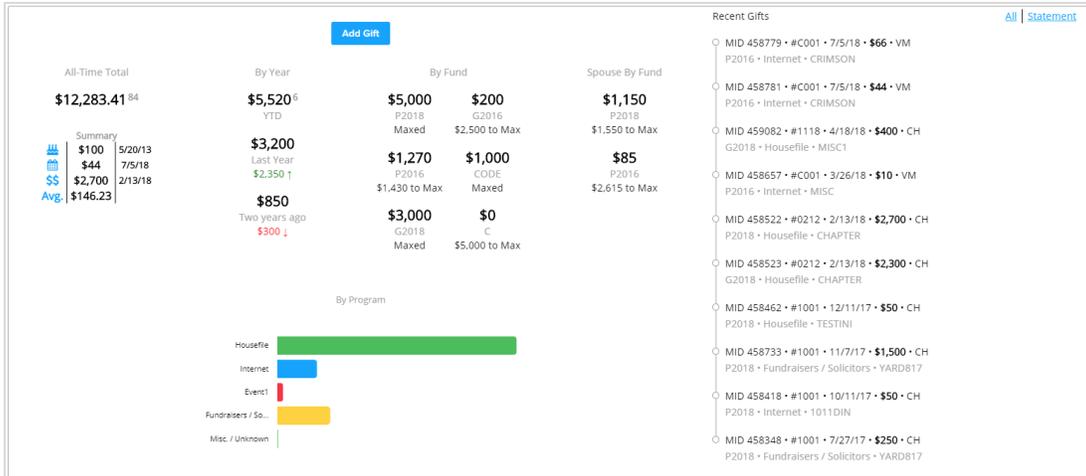
Profile	Contact
Type: Individual Code: Donor Industry: [Blank] Prefix: Mr. First Name: Joseph Middle Name: M. Last Name or Company/Organization: Banks Suffix: Sr. Spouse: Ellen Member Assigned: [Blank] In Honor/Memory Of: [Blank]	Tracking#: 3018 Occupation: CEO Employer: Joseph Banks Formal Salutation: Mr. Banks Informal Salutation: Joe Mail Salutation: Mr. & Mrs. Banks Mail Name: Joe and Ellen Primary Mail Record: [Checked] DOB: [Blank] Title: [Blank] Assistant: Tina Johnson
Home Phone: (123) 456-7890 Cell Phone: (724) 393-1099 Work Phone: (999) 999-9999 Fax: 404.393.7854 Email Address: [Blank] Website: [Blank] Facebook: https://www.facebook.com/crmdi.crimson Twitter: https://twitter.com/CrimsonCRM Assistant Phone: (999) 999-9999 Assistant Email Address: joebanks@joebanks12A3.com	Address Type: Business Street: 1593 Spring Hill Rd Suite: Suite 400 City: Vienna State / Zip: VA 22182 

Biography:
At 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

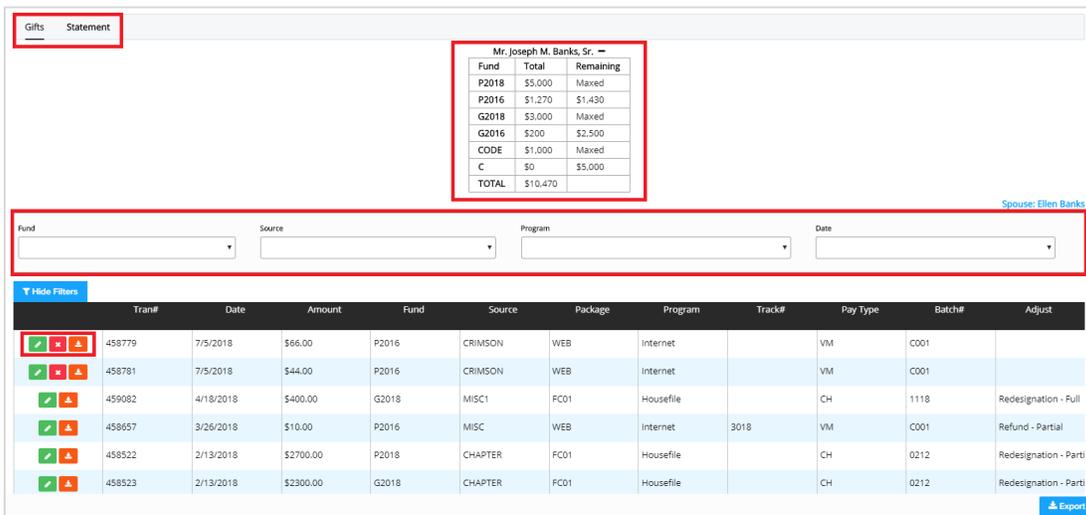
- The majority of the fields will open in a fully editable format as displayed above. When you have made all appropriate changes, click the **Save** button at the bottom right. Click the **Cancel** button to undo any changes made without saving. You can exit the **Edit Record** screen by clicking the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

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 have added the contribution information in the new money screen, press the **Save** button.
- 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 \$3,000 amount for G2018, it will display a list of all the individual contributions this donor gave to G2018 that equals the total amount of \$3,000.
- 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 export gifts to an Excel file, press the  button.