How to Organize Your Data in Crimson

Understanding the difference between all the codes in Crimson is key to maximizing all its features. Set up in a four-level hierarchy, Crimson codes are explained below. For information on how to set up or edit these codes, please refer to the Crimson Helpdesk.

How Crimson Data is Set Up

Data in Crimson is set up in a four-level hierarchy:

1. Fund

This is the campaign level that identifies which committee or cycle and election it is. This allows you to identify information from the current campaign or committee and correctly report it to the FEC.

Example: P2024 *is a Fund Code for donations raised in the 2024 primary.* G2024 *is the Fund Code for donations raised in the general election.*

Note: Because Fund Codes are the top category to organize all other data, these should be limited and strategically created. Please contact Crimson Customer Support to add or edit.

Fund Codes
P2024 & G2024

Program Codes
Housefile Mail, Major Donor, Event

Initiative Codes
E0122 Tax Email

Source Codes
Gun Rights List, P100B Fairfax County GOP

crimson

Fundraising Code Types & Hierarchy

2. Program

This code identifies broad channels or categories of fundraising.

Example: Housefile mail, prospect mail, telemarketing, online, major donor, or event.
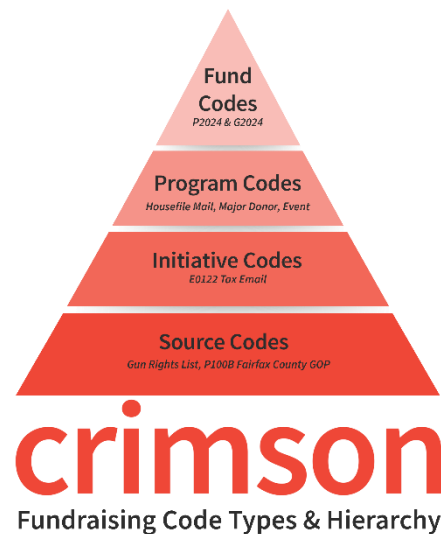
3. Initiative

This code refers to every housefile and prospect appeal sent from your campaign. Each mailing, email, event, or other type of appeal should receive a unique Initiative Code.

Example: P001 would be prospect sent the education mailing.

4. Source

This code identifies individual segments within an **Initiative**. With a prospect appeal, the Source Code would refer to the list that you rented, and the code for a housefile appeal would refer to a specific segment, such as donation level or geographic area. To make events easier to manage, give each of them a unique Source Code. This will help you track the donations made at each event.

Example: P001A Family Matters List, P001B Clark County Republicans & P001C Candidate Contact List

Remember: Every Source Code is linked to a broader Initiative code and an even broader Program code. However, Crimson will only require you to select a Fund Code and Source Code when entering or loading a gift.