

LGL Basic Training Constituents 101

Presented by Timi Paccioretti
Assisted by Robyn Gallagher



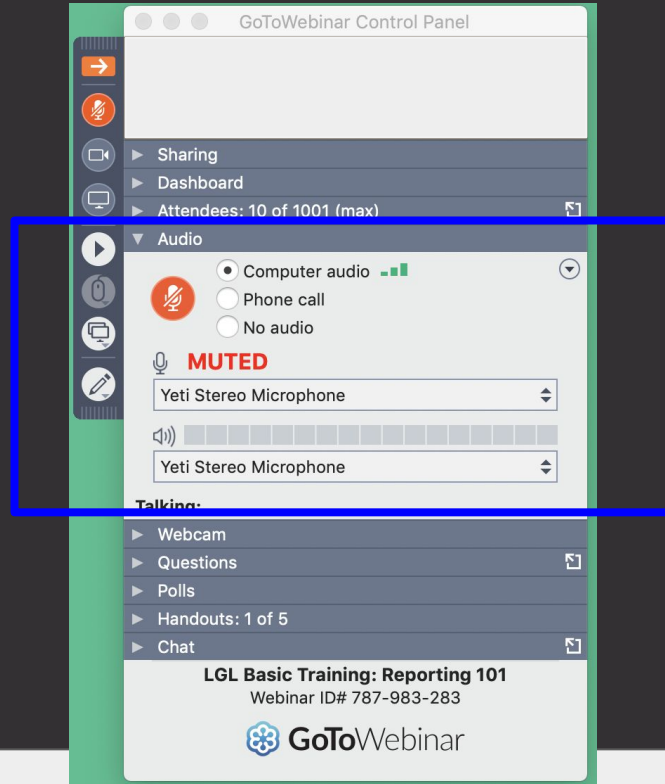
Audio Problems?

The audio section of the Gotowebinar Control Panel has options for:

- computer audio
- phone call



Be sure to check that your speakers are turned up if using computer audio!



Constituents 101:

Part 1

Presented by Timi Paccioretti
Assisted by Robyn Gallagher



What we'll cover:

The Constituent Record : How to create and edit Constituent records, enter both types of constituents, learn how to best manage household records, and learn how to search, manage and merge duplicate records.

Note: We will stop for questions during the presentation, then allot time at the end of the session for further discussion. Pls keep questions to the topics we will cover in this session.

All sessions are recorded and will be emailed to you following each session. You can also view all recordings in the [Training Videos section](#) of the LGL Video Library.



Creating a Constituent Record in LGL



2 Types of Constituent Records in LGL

Individual record

Can represent a single person, a couple or even a household.

Only field required to be populated is the “Last name” field

Organization record

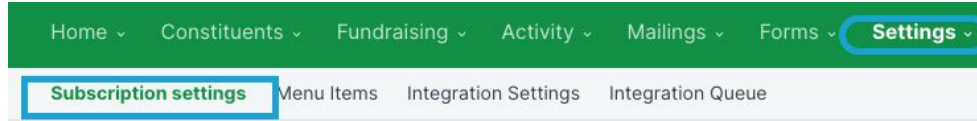
Use this for businesses, vendors, foundations, etc.

Only field that must be populated is the name of the organization.

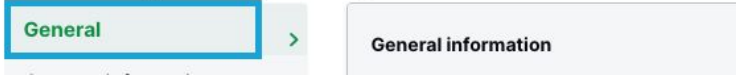
It is possible to capture a Contact name at the organization.



Constituent record Settings:



Subscription settings



- Add Prefix & suffix field
- Set Addressee & Salutation preferences

These settings control how LGL will put together addressee and salutation information based on inputs to the main constituent name fields. Examples:

- **Formal salutation:** Mr. Smith (calculated from prefix and last name)
- **Informal salutation:** John (calculated from first name)
- **Formal addressee:** Mr. John Smith (calculated from prefix, first name, and last name)
- **Informal addressee:** John Smith (calculated from first name and last name)

Constituent Names

General

- Add fields for constituent prefix and suffix?
- Include spouse/partner name in salutation and addressee?
- Include contact name in salutation and addressee for organizations?
- Show constituents middle name in search results?

Salutation style

Informal (e.g. John) ▾

Addressee style

Informal (e.g. John Smith) ▾

and style

and (e.g. John and Jane Smith) ▾

Save



Demo:

**Add a new Individual record and a
new Organization record**



Managing Household Data



Managing Households - 2 approaches

Simple Approach

Use one record for a couple or a family

Benefit: simplifies donation tracking and mailings

Limitations: Unable to add categories to individuals; can't sync more than one email address

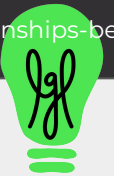
Advanced Approach

Use multiple records tied with relationships for each person in the family

Benefit: More detailed data can be collected, each record can be sent emails

Limitations: None, but requires more careful management

<https://help.littlegreenlight.com/article/78-creating-relationships-between-constituents>



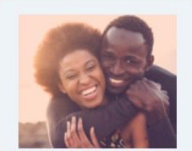
Example: Use one record to record a household

Constituents > Mr. and Mrs. Tom Abbott / The Bristol Press Send mail

Individual details: *Abbott, Tom* ID: 944477

▼ Name Information

Addressee/Label Name Mr. and Mrs. Tom Abbott	Salutation Tom and Mary	Annual report name Tom and Mary Abbott
Alt. addressee --	Alt. salutation --	Honorary name Tom and Mary Abbott
First name Tom	Last name Abbott	Middle Name --
Employer The Bristol Press	Job title Editor	
Birthdate --	Nicknames --	



Change picture

▼ Spouse/Partner Information

Spouse/partner name Mary

[The Abbott's record in LGL](#)


Example: Use multiple records and connect via Relationships

Constituents > Mike and Carol Brady Send mail

Individual details: *Brady, Mike* ID: 943882

▼ Name Information

Addressee/Label Name Mike and Carol Brady	Salutation Mike and Carol	Annual report name Mike and Carol Brady
Alt. addressee Mike Brady	Alt. salutation Mike	Honorary name Mr. and Mrs. Mike Brady
First name Mike	Last name Brady	Middle Name --
Employer --	Job title --	
Birthdate --	Nicknames Mikey	



Change picture

▼ Spouse/Partner Information

Spouse/partner name Carol Brady Edit <small>Source: Brady, Carol (Spouse/Partner)</small>	Marital status Married
--	----------------------------------

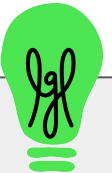
▼ Related Constituents

Relationships

[Brady, Greg \(Child\)](#) More...

[Edit relationships](#)

[Mike's record in LGL](#)



Demo:

Add an Individual record with a related spouse/partner record



Managing duplicate records



Searching for duplicate records:

Duplicates

▼ Duplicate Checking Settings

[Instructions for using the Duplicate Finder](#) ⓘ Show

Restrict duplicate checking to:

All Constituents

Constituents on a specific list

Constituents in a specific import

Check for duplicates across Contact Types?

No, only check within Contact Types (recommended)

Yes, check across Contact Types (Primary, Spouse/partner, etc.)

Duplicate checking method

Name only

Last Name only

Email only

Email and first name

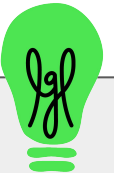
Address only

Address and last name

Address and full name

Phone number only

[↻ Run dupe checker](#)



Unmerging records:

Find & merge duplicates

Paccioretti, Timi > Find & merge duplicates

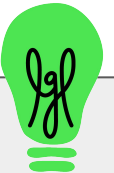
Find and review duplicates

Search | **History**

Undo merge

Timothea Paccioretti
Timothea Paccioretti
7 Meach St
Bristol, CT 06010

Status: Merged on 2024-01-08 at
12:35 PM



Demo:

**Search for duplicate records, merge
then un-merge**



FREE Training & Support for LGL Users

- Customer Q&A sessions - small group webinars (No more than 4 people)
- Extensive online [Knowledge Base](#)
- [Video Library](#): Recorded training webinars
- Support by email (M-F 9am-7 pm ET)
- [Subscribe](#) for Fundraising tips/LGL Feature updates



Questions & Answers



Constituents 101:

Part 2

Presented by Timi Paccioretti
Assisted by Kelsi Dunn



What we'll cover:

Using Constituent Records : How to manage and use Constituent categories, including bulk editing them, how to create lists and perform simple and advanced Constituent Searches.

Note: We will stop for questions during the presentation, then allot time at the end of the session for further discussion. Pls keep questions to the topics we will cover in this session.

All sessions are recorded and will be emailed to you following each session. You can also view all recordings in the [Training Videos section](#) of the LGL Video Library.



Constituent Categories



What are Constituent Categories?

Constituent Categories

- Constituent categories make it possible to segment, or code, your constituents in different ways.
- They are the best way to keep your constituents organized and to facilitate the creation of targeted lists, reports, and mailings.

Examples: Groups, Communication tags, Capacity, etc.



Can I customize Constituent Categories or add new ones?

YES - within the Menu Items area in the Settings tab!

- LGL comes with some default categories that can be customized (**Examples:** Groups, Communication tags, Capacity, etc.)
- It is also possible to create as many new Custom Categories as you wish (Examples: Volunteer interests, Referral source, Gender, etc.)



Demo:

Adding and managing constituent categories & making bulk edits to categories

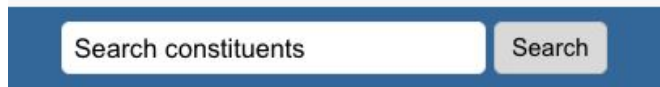


Constituent Searching



Searching Options

Name searches (search terms: names, partial or full, email, ID #)

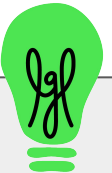


A search interface consisting of a white text input field with the placeholder text "Search constituents" and a grey "Search" button to its right, all contained within a blue rectangular border.

Filters (ability to sort constituents by LGL Categories)

Constituents

- ▼ **By Group**
 - Alumni (9)
 - Business (13)
 - Event attendee (1)
 - Faculty/staff (1)
 - Foundation (1)
 - Major donor prospect (1)
 - Parent (4)
 - Board member (8)
 - Volunteer (15)
 - Friend (105)
 - [Less...](#)



Searching Options

Advanced searches (single or multiple criteria searches as well as complex searches i.e and/not)

Single criteria search

Advanced Search

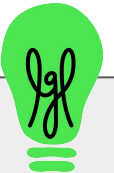
Show constituents where

All of the following are true

Can send mail?

[Add more criteria](#) • [Advanced options](#) ?

[New Search](#)



Advanced Searches

Multiple criteria Constituent search:

Advanced Search

Show constituents where

All of the following are true

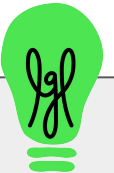
- Single Gift Amt. \$
- Gift types [Gift](#) **Status:**

[Add more criteria](#) · [Advanced options](#) 

[New Search](#)

Results 1 - 21 of 21

0 selected constituents



Advanced Searches

Multiple criteria Constituent search with Advanced option:

Advanced Search

Show constituents where

All of the following are true

Single Gift Amt. \$ 2500

Gift types [Gift](#) **Status:** Any

[Add more criteria](#) · [Advanced options](#)

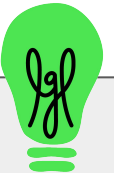
Groups [Alumni, Board member](#)

[Add more criteria](#) · [Remove query](#)

[New Search](#)

Results 1 - 15 of 15

0 selected constituents



Demo:

Creating Simple and Advanced Constituent searches



Creating Constituent Lists with List Manager



Lists: 2 Options

Static List

Represents data at a specific point in time

This is useful when you want to compare info from one point in time to another

(i.e. [compare email address growth from 2021 to 2022](#))

Dynamic List

List of constituents that automatically updates as search criteria is met

This is useful when you want up-to-the-minute data with a single click

(i.e. [Lapsed donors who gave \\$500 or more in a single gift](#))



Demo:

Creating a Constituent List



FREE Training & Support for LGL Users

- Customer Q&A sessions - small group webinars (No more than 4 people)
- Extensive online [Knowledge Base](#)
- [Video Library](#): Recorded training webinars
- Support by email (M-F 9am-7 pm ET)
- [Subscribe](#) for Fundraising tips/LGL Feature updates



Questions & Answers

