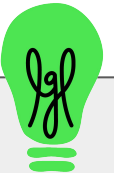


# LGL Basic Training Constituents 101

Presented by Timi Paccioretti



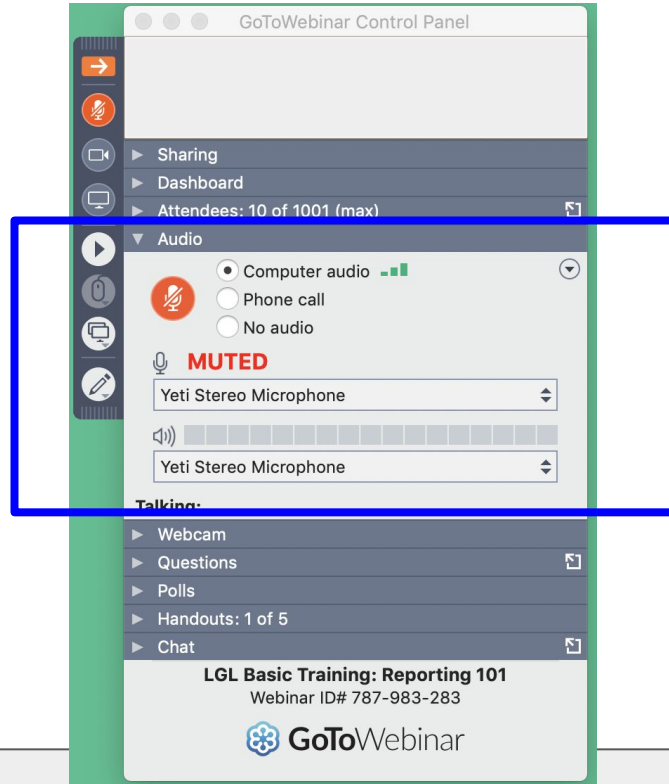
# Audio Problems?

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!



# Part 1

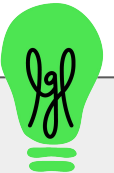
Presented by Timi Paccioretti



# 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.

All sessions are recorded and will be emailed to you following each session. You can also view all [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

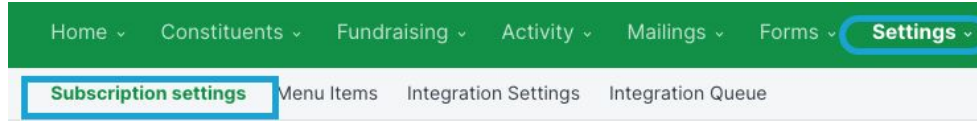
Use this for businesses, vendors, foundations, etc.

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

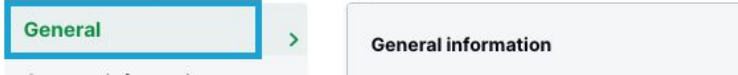
It is possible to capture a Contact name at the organization.



# Constituent record Settings:

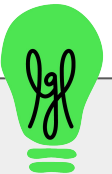


## Subscription settings



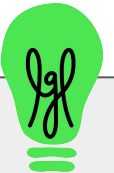
- Add Prefix & suffix field
- Set Addressee & Salutation preferences

A screenshot of the 'Constituent Names' settings page. At the top, a light blue box contains the text: 'These settings control how LGL will put together addressee and salutation information based on inputs to the main constituent name fields. Examples:'. Below this are four bullet points: '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)', and 'Informal addressee: John Smith (calculated from first name and last name)'. The main section is titled 'Constituent Names' and includes a 'General' section with three checked checkboxes: 'Add fields for constituent prefix and suffix?', 'Include spouse/partner name in salutation and addressee?', and 'Include contact name in salutation and addressee for organizations?'. There is also an unchecked checkbox for 'Show constituents middle name in search results?'. Below this are three dropdown menus: 'Salutation style' (set to 'Informal (e.g. John)'), 'Addressee style' (set to 'Informal (e.g. John Smith)'), and 'and style' (set to 'and (e.g. John and Jane Smith)'). A blue 'Save' button is at the bottom.



# 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

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



Change picture

▼ Spouse/Partner Information

<b>Spouse/partner name</b> 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

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



Change picture

▼ Spouse/Partner Information

<b>Spouse/partner name</b> Carol Brady <a href="#">Edit</a> <small>Source: Brady, Carol (Spouse/Partner)</small>	<b>Marital status</b> Married
--	----------------------------------

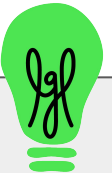
▼ Related Constituents

**Relationships**

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

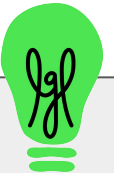
[Edit relationships](#)

[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

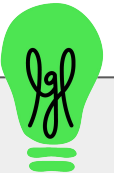
**Check for duplicates across Contact Types?**

- 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

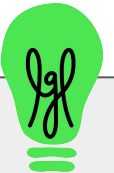
Timothea Paccioretti  
Timothea Paccioretti  
7 Meach St  
Bristol, CT 06010

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



# Demo:

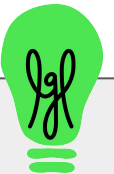
**Search for duplicate records, merge  
then un-merge**





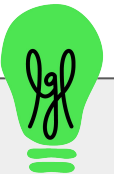
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# Part 2

Presented by Timi Paccioretti  
Assisted by Robyn Gallagher

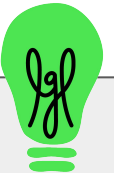


# What we'll cover:

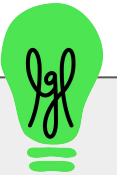
## Using Constituent Records

**Constituent categories, including bulk editing them, how to create lists and perform simple and advanced Constituent Searches.**

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



# Constituent Categories

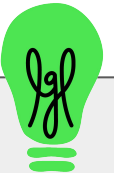


# What are Constituent Categories?

## 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.

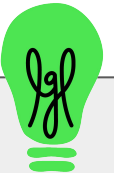


# Can I customize Constituent Categories or add new ones?

**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**



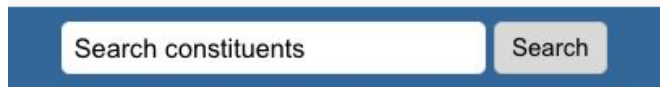
# Constituent Searching





# Searching Options

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

A search interface with a blue background. It features a white text input field on the left containing the placeholder text "Search constituents" and a grey button on the right labeled "Search".

Search constituents Search

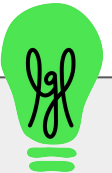
**Filters** (ability to sort constituents by LGL Categories)

## 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

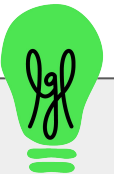
Show constituents where

*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. is greater/equal \$ 2500
- ✕ Gift types include any Gift Edit Status: Any

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

[Save this search](#) [New Search](#)

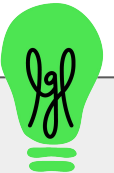
Results 1 - 21 of 21

0 selected constituents

Select 21

Deselect 21

Show all



# Advanced Searches

## Multiple criteria Constituent search with Advanced option:

### Advanced Search

Show constituents where

*All of the following are true*

Single Gift Amt.  \$

Gift types    **Status:**

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

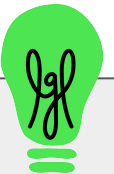
Groups

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

[New Search](#)

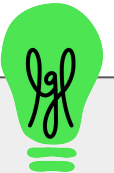
Results 1 - 15 of 15

0 selected constituents

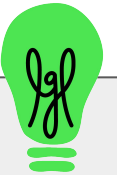


# Demo:

## **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

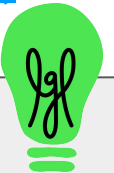
(i.e. [compare email address growth from 2021 to 2022](#))

## Dynamic List

List of constituents that automatically updates as search criteria is met

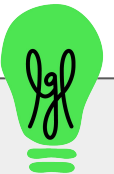
This is useful when you want up-to-the-minute data with a single click

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



# Demo

## Creating a Constituent List





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