LGL Basic Training Constituents 101

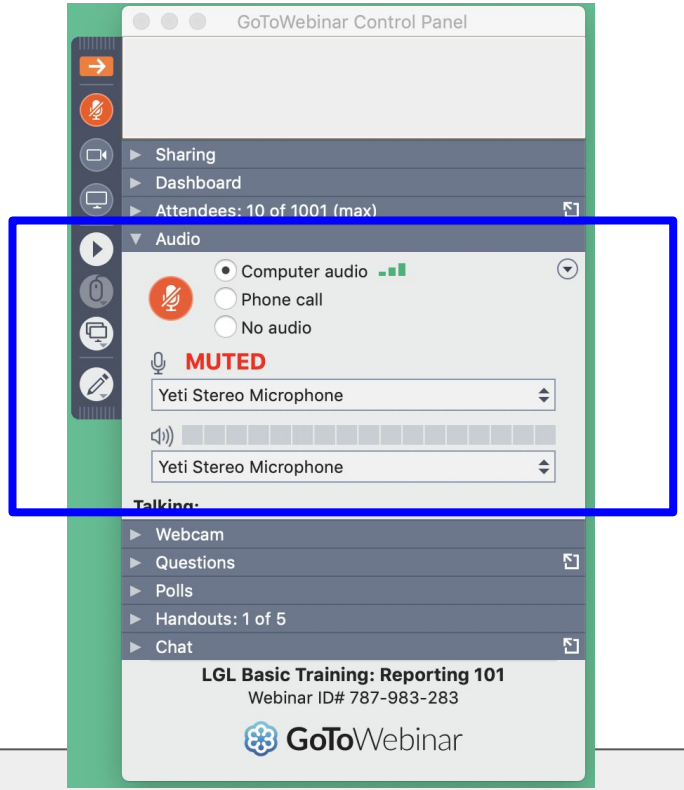
Presented by Timi Paccioretti

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

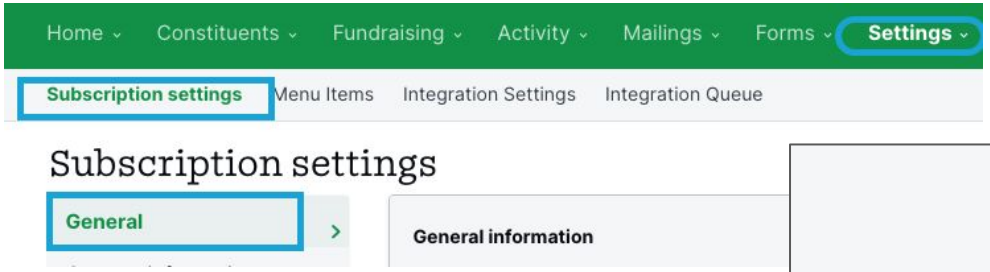
Organization record

Use this for businesses, vendors, foundations, etc.

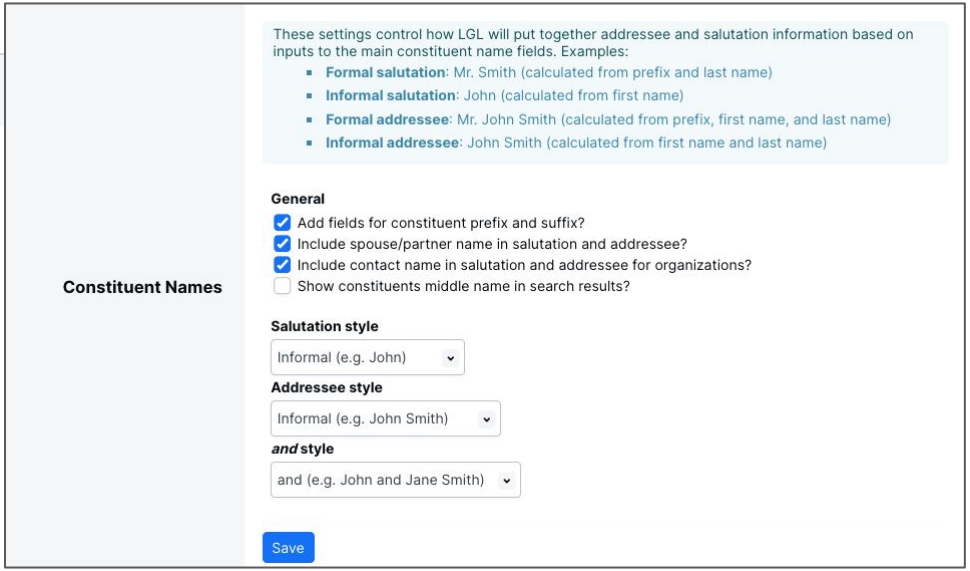
Only field that must be populated is the name of the organization.

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

Constituent record Settings:



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



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

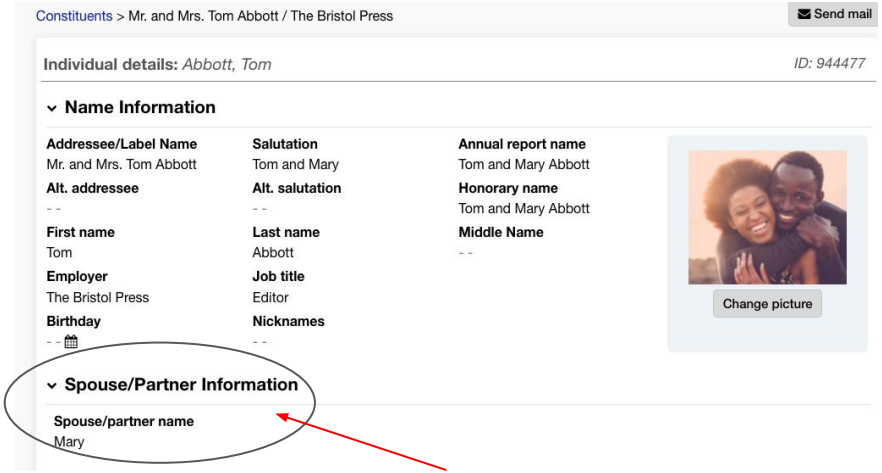
Use multiple records tied with relationships for each person in the family

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

Limitations: None, but requires more careful management

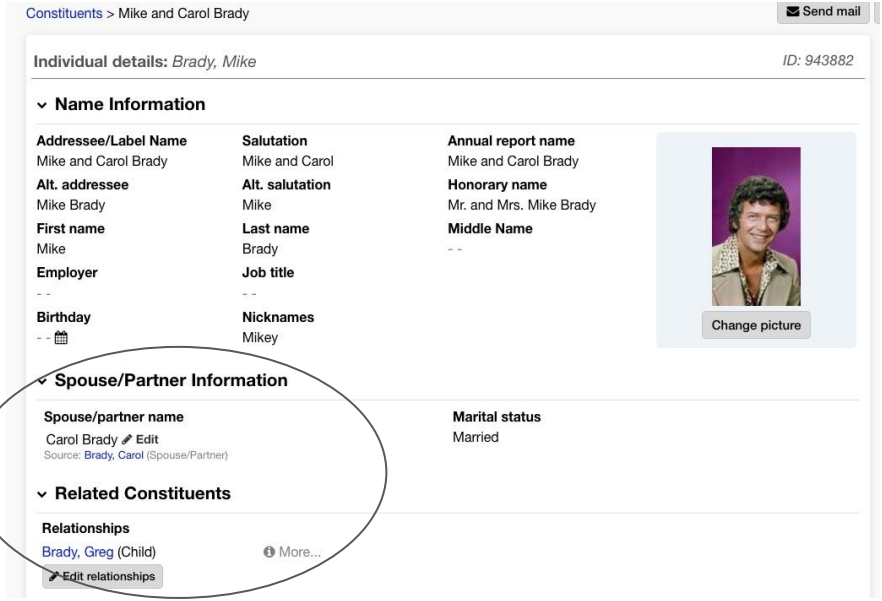
https://help.littlegreenlight.com/article/78-creating-relationships-between-constituents

Example: Use one record to record a household



[The Abbott's record in LGL]

Example: Use multiple records and connect via Relationships



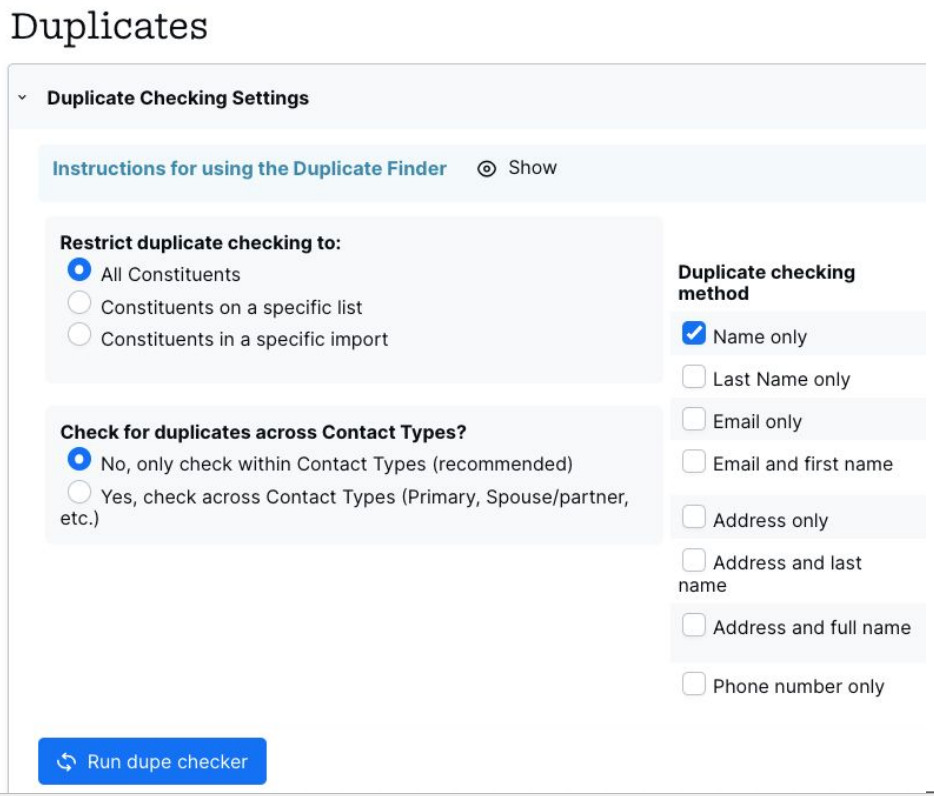
[Mike's record in LGL]

Demo:

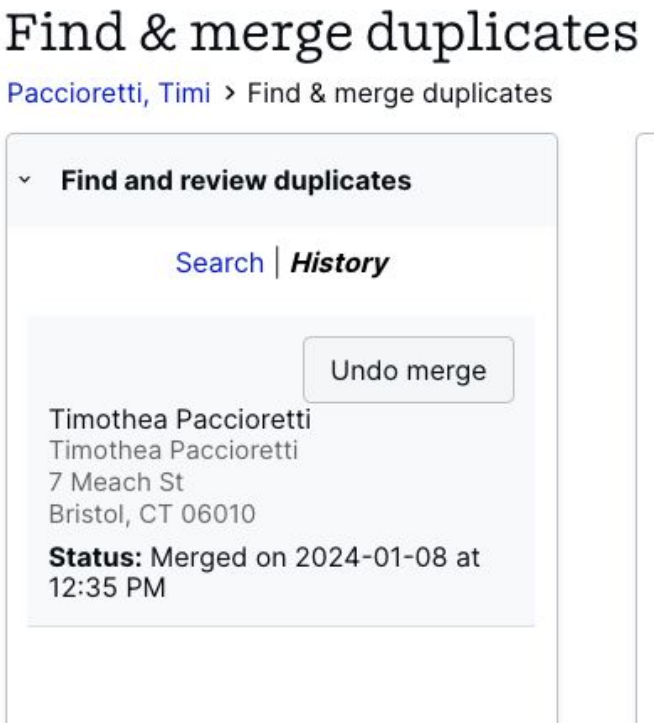
Add an Individual record with a related spouse/partner record

Managing duplicate records

Searching for duplicate records:

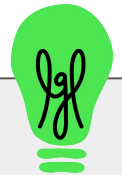


Unmerging records:



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

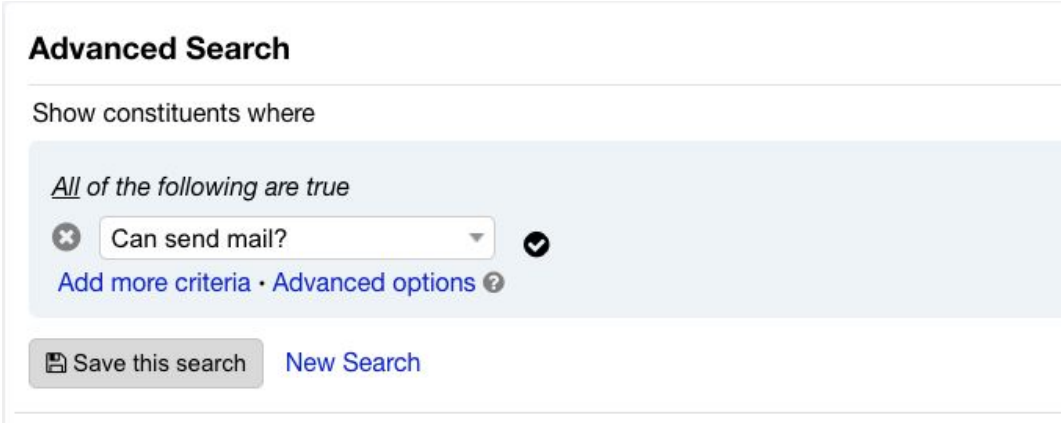
Name searches (search terms: names, partial or full, email, ID #)

Filters (ability to sort constituents by LGL Categories)

Searching Options

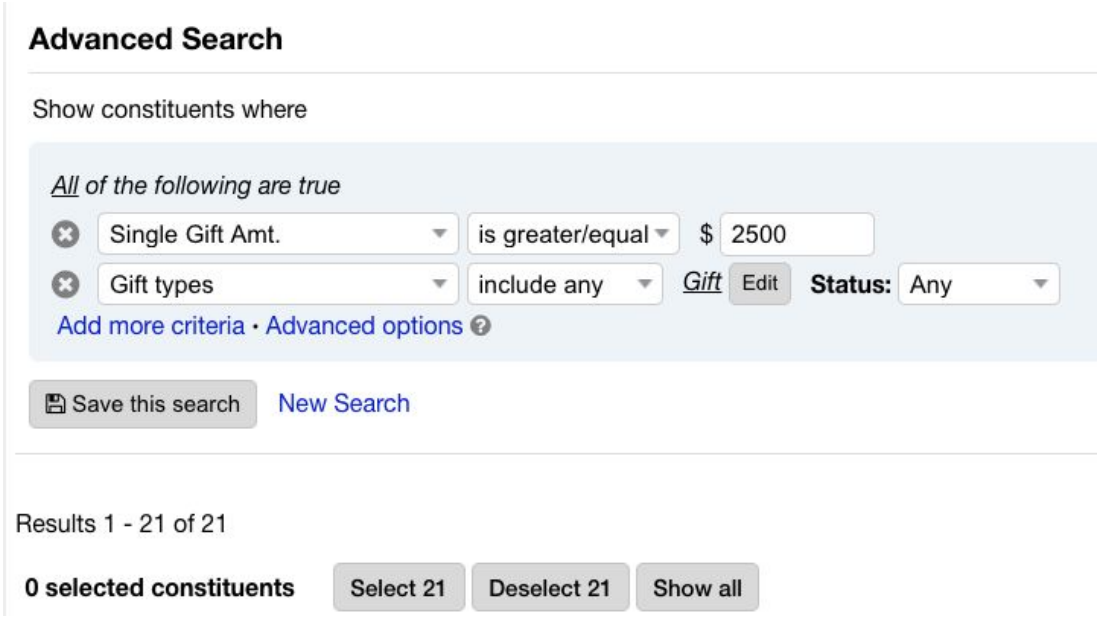
Advanced searches (single or multiple criteria searches as well as complex searches i.e and/not)

Single criteria search



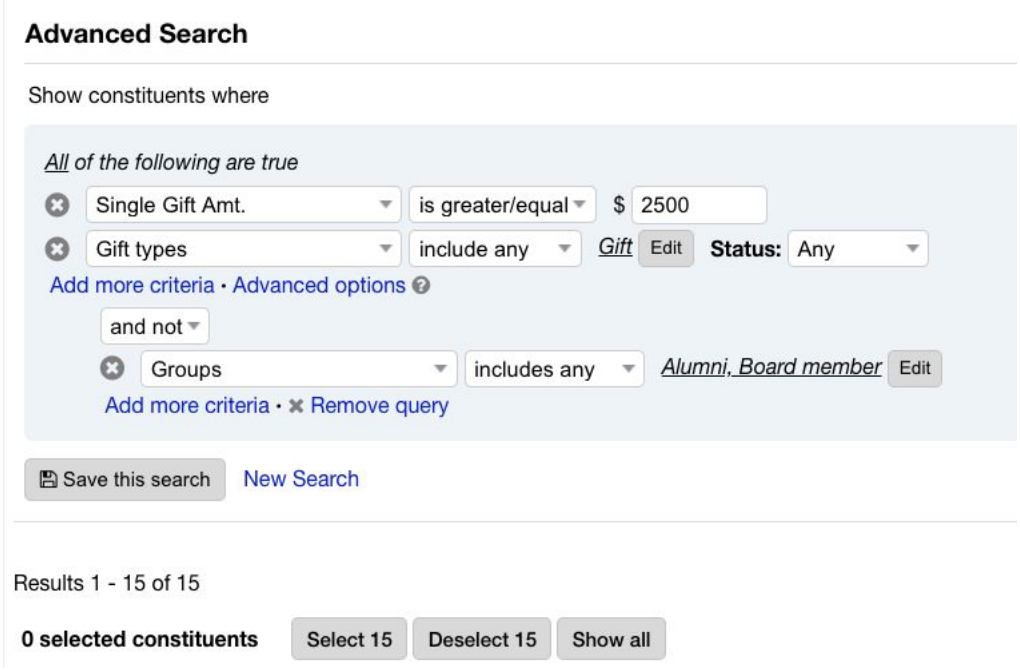
Advanced Searches

Multiple criteria Constituent search:



Advanced Searches

Multiple criteria Constituent search with Advanced option:



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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