# Little Green Light

## Constituents 101 Basic Training - Part 1

**Part 1:** The Constituent Record in LGL : 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.

**Creating a new Constituent record**

**Record types:**

**Individual**: for person, couple or household

**Organization**: for business, foundation, vendor, etc.

1. Required fields for each type: Last name for Individual; Organization name for Org record
2. Adding prefix/suffix fields & addressee & salutation preferences
3. List of all fields: Data Dictionary

**Demo:** Manually add a new Individual record and a new Organization record

**Stop for questions**

**Creating Relationships between records**

Approaches to managing household data:

1. Use a single record for family/couple or
2. Use multiple records tied together with the use of relationships
3. Creating relationships between records

**Demo:** Create an individual record with a related spouse/partner record

**Stop for questions:**

**Managing duplicate records**

Search for duplicate records (Review all merging options)
Undoing a Constituent merge

**Demo:** Search for a set of duplicates/merge then un-merge

**Stop for questions:**

**Question & Answers**

**Using LGL Constituent Data**: How to manage and use Constituent Categories, including bulk editing them, how to create lists and perform simple and advanced Constituent Searches.

**Review: of Part 1:** The Constituent Record (create, edit, types, householding, merging, duplicate mgmt)

**Using Constituent records**
    **A. LGL Constituent Categories**
        1. [What are categories](#)?
            a) Default & custom categories
            b) [Best practices on using Groups](#)
        2. How to [Create custom categories](#)
        3. Customizing display of categories
        4. [Bulk editing categories](#)

**Demo:** Adding and managing constituent categories & making bulk edits to categories

**Stop for questions**

**Basic Constituent Searches & Filters**
    A. [Simple name searches](#)
    B. [Using Filters](#)
    C. Single criteria constituent searches, multi-criteria searches, Advanced searches

**Demo**: Simple-Advanced Searches, saving Searches

**Stop for questions**

**Creating Constituent Lists using List Manager**
    A. Creating a new list
        1. Static vs dynamic lists
        2. Adding and removing constituents
        3. Benefits of lists (use in reports, mailings, etc.)

**Demo**: Create, save and use a Constituent List in a search

**Question & Answers**