LGL Basic Training Constituents 101

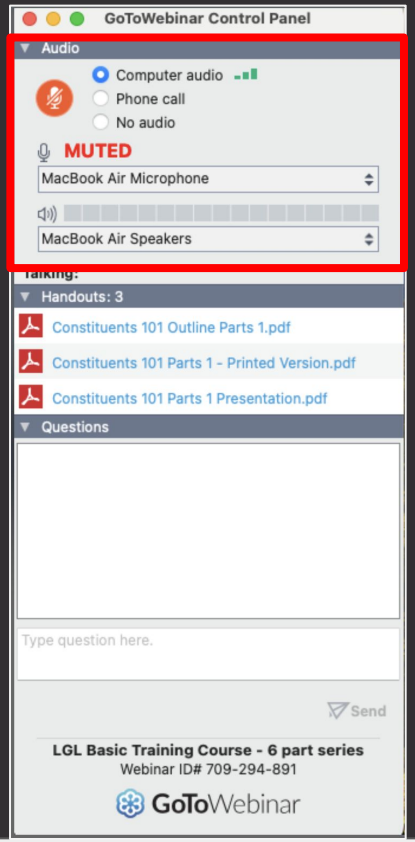
Presented by Robyn Gallagher
Assisted by Emily Fitzsimmons

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!



LGL Basic Training Constituents 101: Part 1

Presented by Robyn Gallagher
Assisted by Emily Fitzsimmons

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.

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

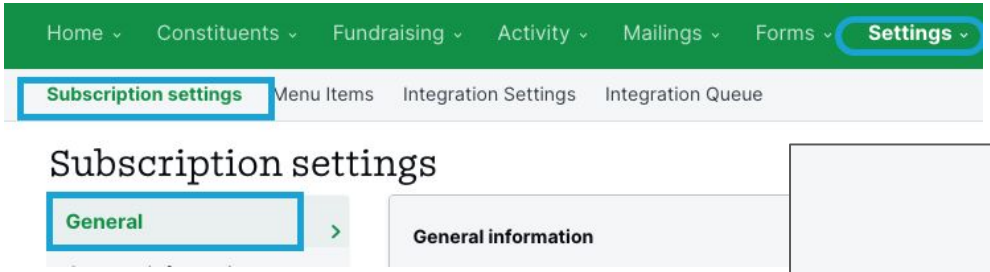
Organization record

Use this for businesses, vendors, foundations, etc.

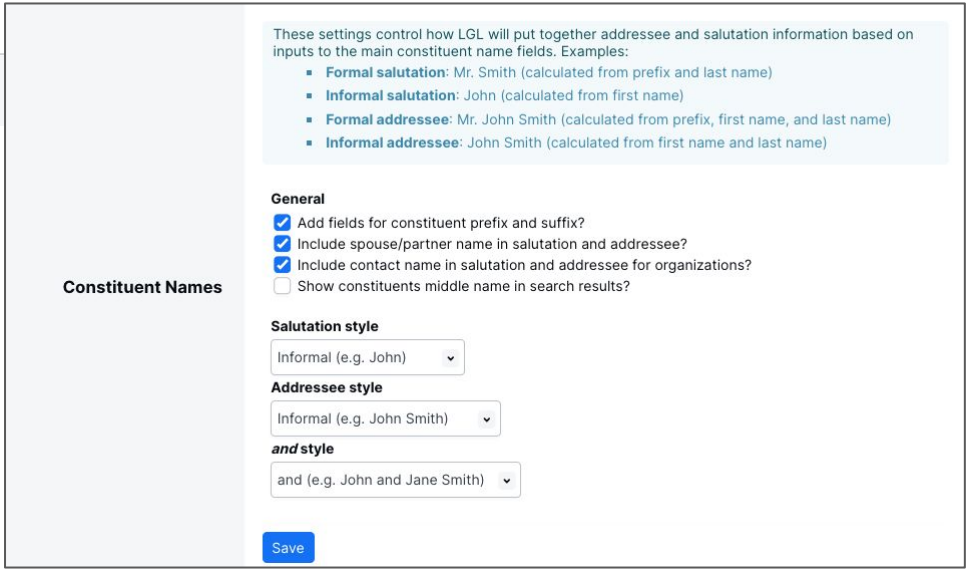
Only field that must be populated is the name of the organization.

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

https://help.littlegreenlight.com/article/77-managing-households-in-lgl

Advanced Approach

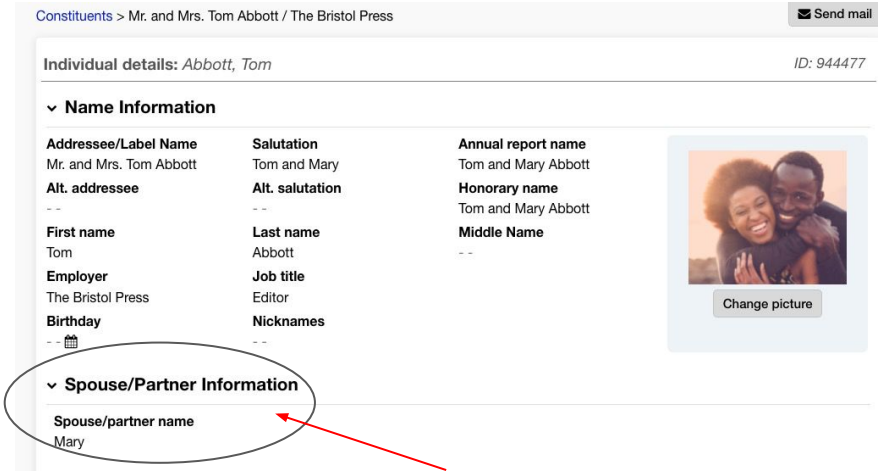
Use multiple records tied with relationships for each person in the family

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

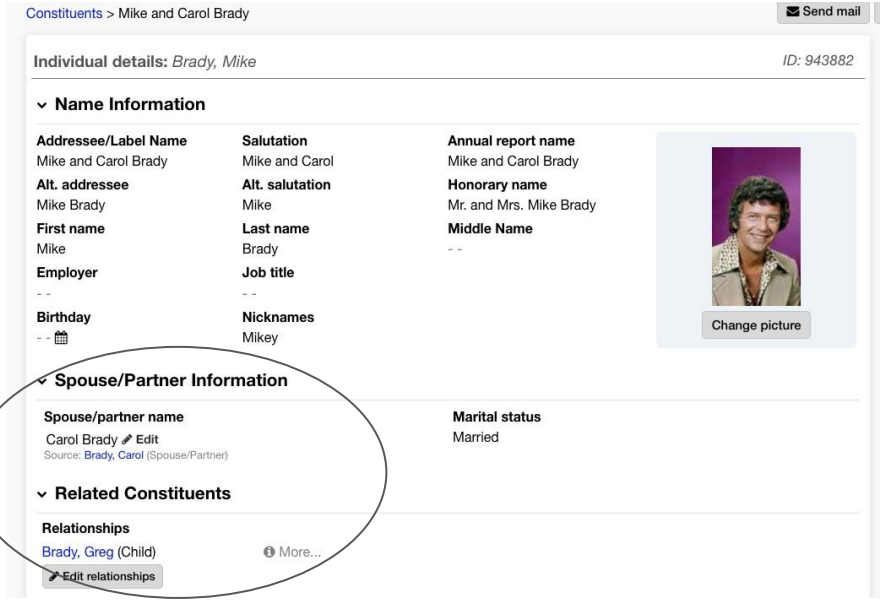
Limitations: None, but requires more careful management

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

Example: Use one record to record a household



Example: Use multiple records and connect via Relationships

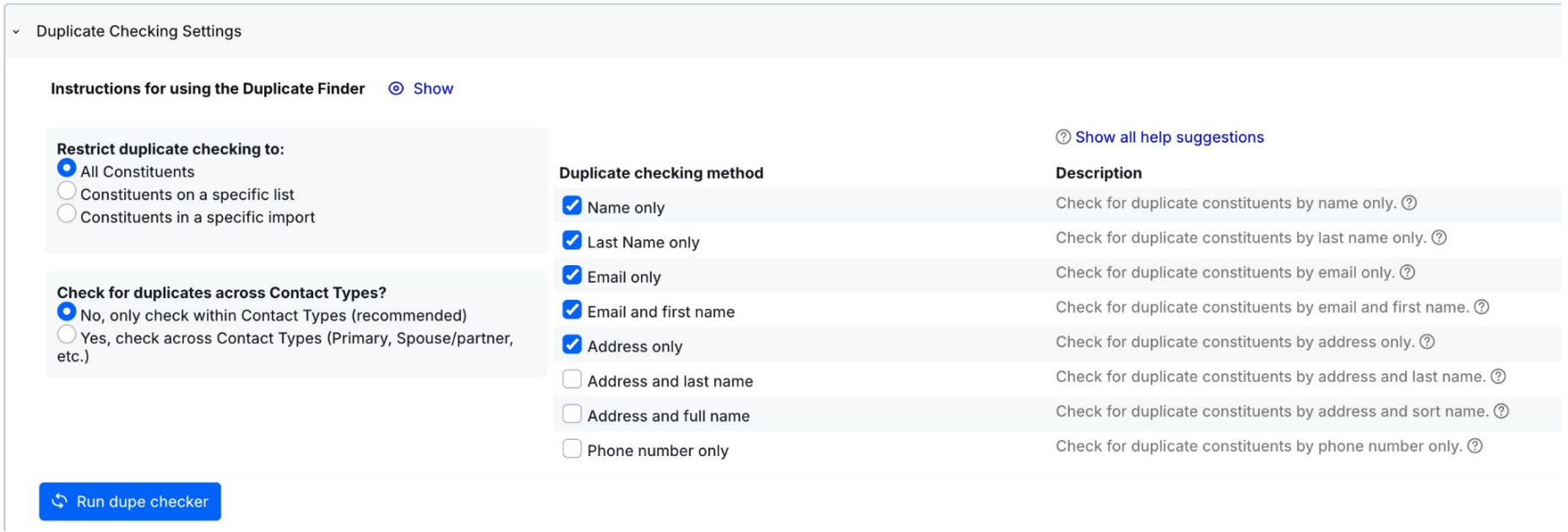


Demo:

Add an Individual record with a related spouse/partner record

Managing duplicate records

Searching for duplicate records:



Searching for duplicate records:

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.)

Show all help suggestions

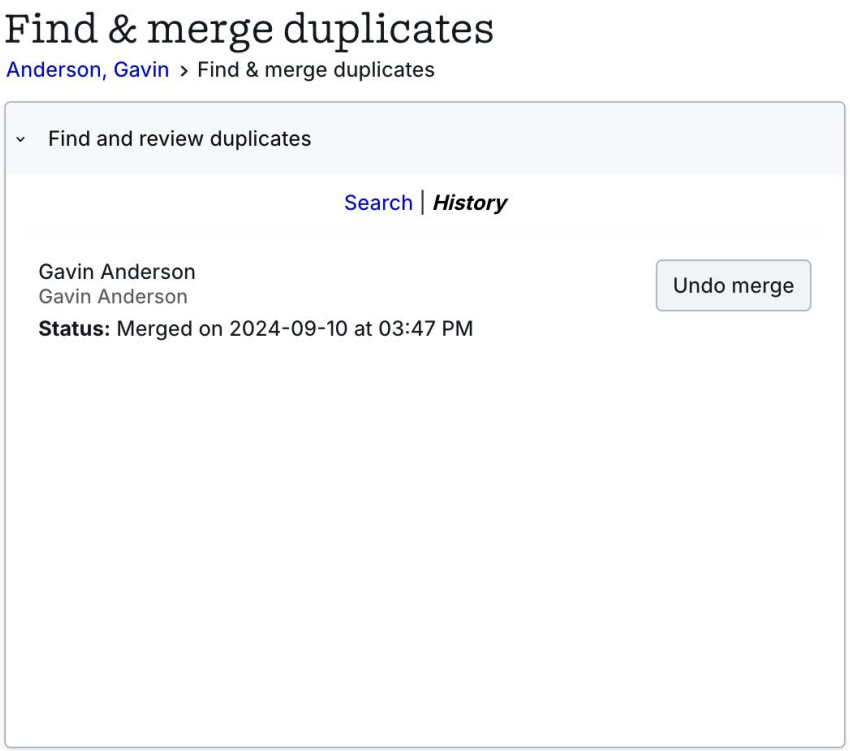
Duplicate checking method	Description
[x] Name only	Check for duplicate constituents by name only.
[x] Last Name only	Check for duplicate constituents by last name only.
[x] Email only	Check for duplicate constituents by email only.
[x] Email and first name	Check for duplicate constituents by email and first name.
[ ] Address only	Check for duplicate constituents by address only.
[ ] Address and last name	Check for duplicate constituents by address and last name.
[ ] Address and full name	Check for duplicate constituents by address and sort name.
[ ] Phone number only	Check for duplicate constituents by phone number only.

Run dupe checker | Dupe check in progress

The duplicate checking process is running. It might take a while, depending on how many constituents you have, the options chosen, and the number of possible duplicates found using those options.

Email will be sent to **Robyn Gallagher** [redacted], who initiated the dupe-checking, when the process is complete

Unmerging records:



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

LGL Basic Training Constituents 101

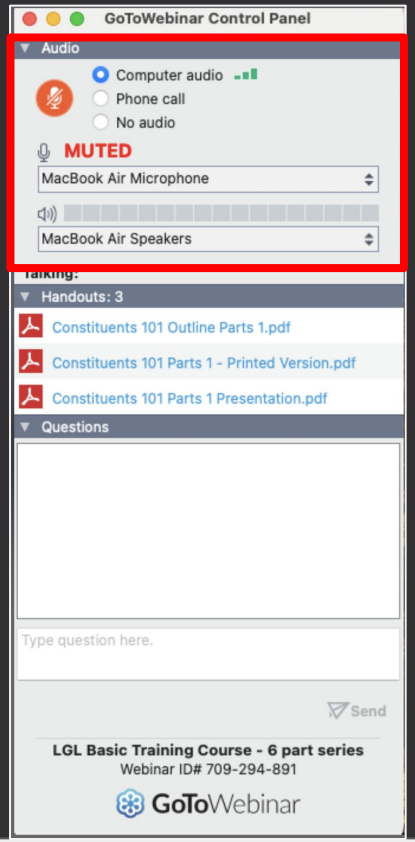
Presented by Robyn Gallagher
Assisted by Emily Fitzsimmons

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 2

Presented by Robyn Gallagher
Assisted by Emily Fitzsimmons

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.

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, etc.)

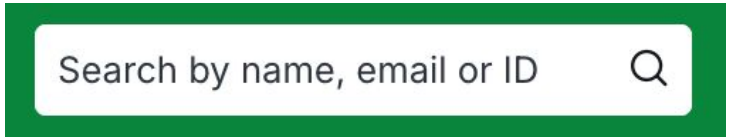
Demo:

Adding and managing constituent categories & making bulk edits to categories

Constituent Searching

Searching Options

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

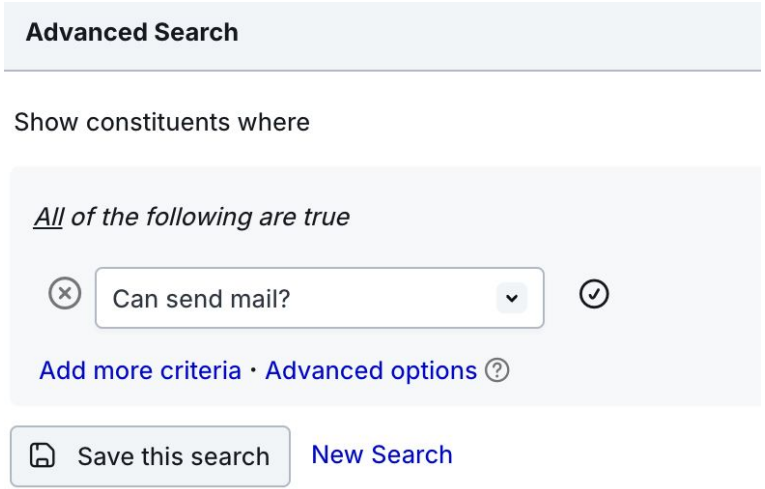


Filters (ability to sort constituents by LGL Categories)

Searching Options

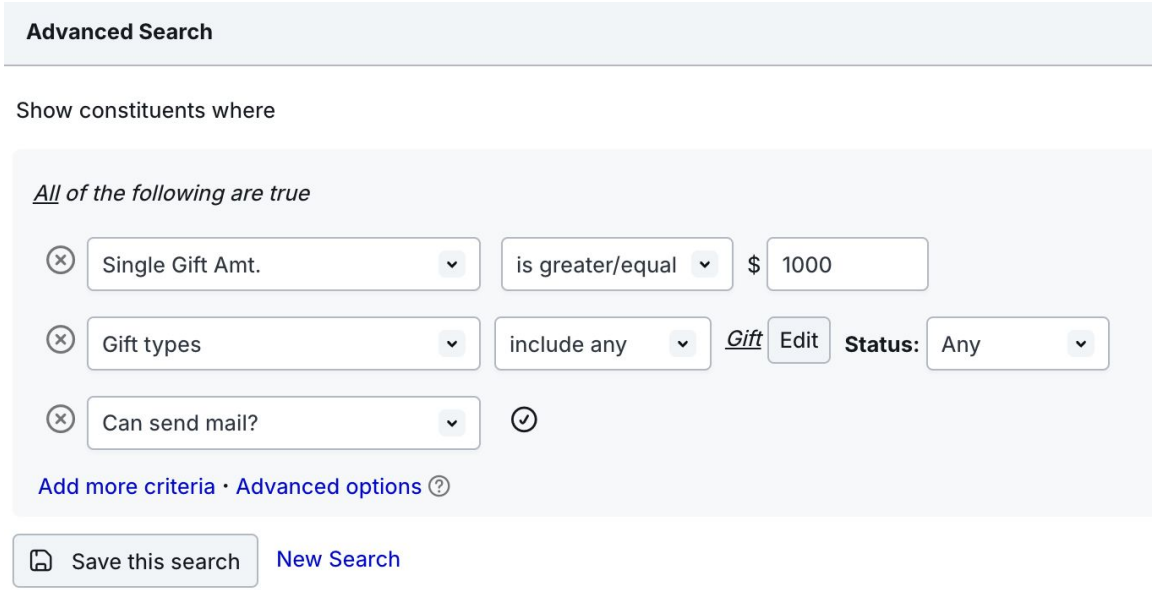
Advanced searches **(single or multiple criteria searches as well as complex searches i.e and/not)**

Single criteria search



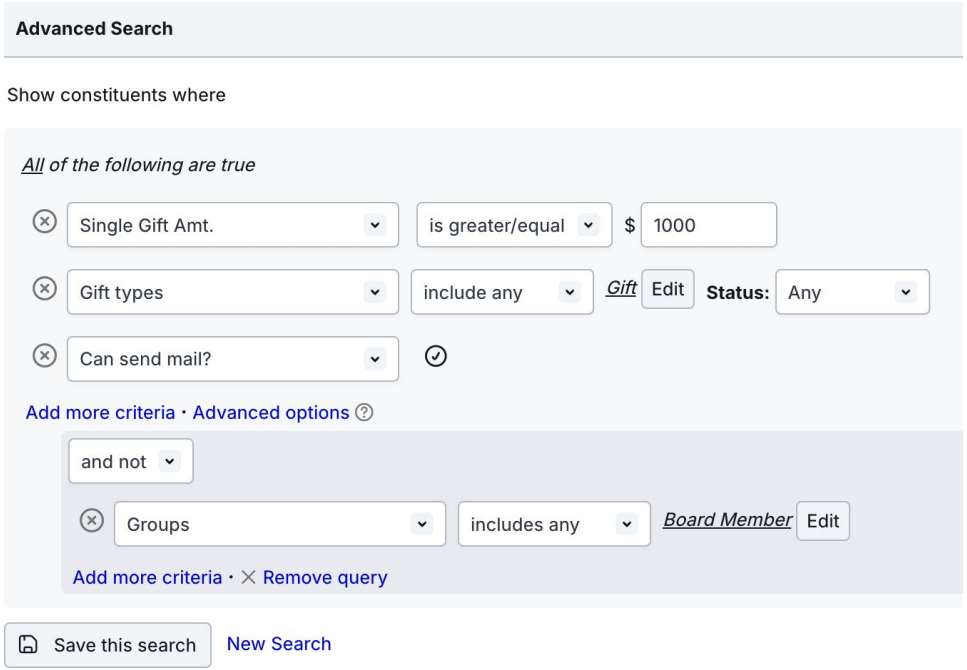
Advanced Searches

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 2023 to 2024)

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