

# LGL Basic Training Constituents 101

Presented by Robyn Gallagher  
Assisted by Emily Fitzsimmons

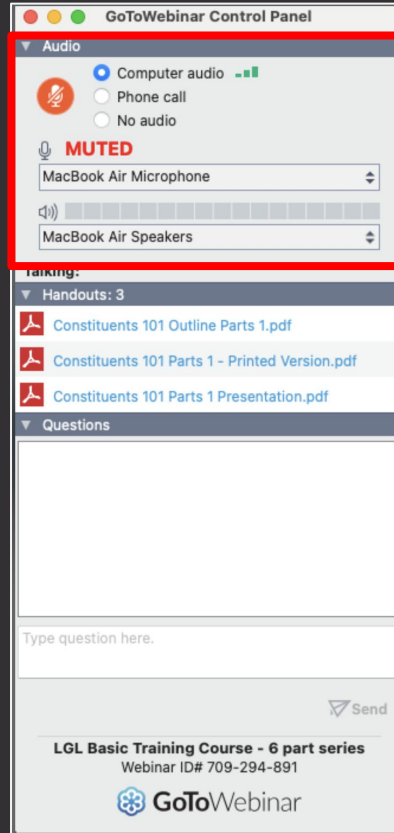


# Audio Problems?

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# LGL Basic Training

## Constituents 101:

### Part 1

Presented by Robyn Gallagher  
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# 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

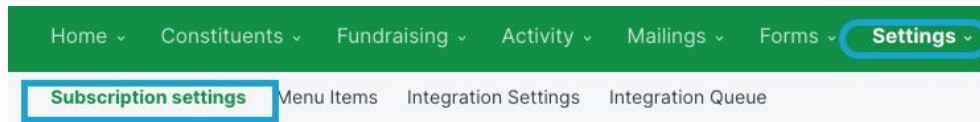
Use this for businesses, vendors, foundations, etc.

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:



## Subscription settings

General

General information

- 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

<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

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

Send mail

Individual details: *Abbott, Tom*

ID: 944477

### ▼ Name Information

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



Change picture

### ▼ Spouse/Partner Information

**Spouse/partner name**  
Mary

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



Change picture

### ▼ Spouse/Partner Information

**Spouse/partner name**  
Carol Brady [Edit](#)  
Source: [Brady, Carol](#) (Spouse/Partner)

**Marital status**  
Married

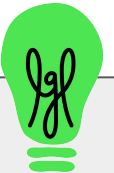
### ▼ Related Constituents

#### Relationships

[Brady, Greg](#) (Child)

[More...](#)

[Edit relationships](#)



# 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

[🔗 Show all help suggestions](#)

#### Description

- Check for duplicate constituents by name only. [🔗](#)
- Check for duplicate constituents by last name only. [🔗](#)
- Check for duplicate constituents by email only. [🔗](#)
- Check for duplicate constituents by email and first name. [🔗](#)
- Check for duplicate constituents by address only. [🔗](#)
- Check for duplicate constituents by address and last name. [🔗](#)
- Check for duplicate constituents by address and sort name. [🔗](#)
- Check for duplicate constituents by phone number only. [🔗](#)

[↻ Run dupe checker](#)



# Searching for duplicate records:

## Duplicate Checking Settings

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

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[Show all help suggestions](#)

### Description

- Check for duplicate constituents by name only. [?](#)
- Check for duplicate constituents by last name only. [?](#)
- Check for duplicate constituents by email only. [?](#)
- Check for duplicate constituents by email and first name. [?](#)
- Check for duplicate constituents by address only. [?](#)
- Check for duplicate constituents by address and last name. [?](#)
- Check for duplicate constituents by address and sort name. [?](#)
- 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**, who initiated the dupe-checking, when the process is complete



# Unmerging records:

## Find & merge duplicates

[Anderson, Gavin](#) > Find & merge duplicates

Find and review duplicates

[Search](#) | *History*

Gavin Anderson  
Gavin Anderson

Status: Merged on 2024-09-10 at 03:47 PM

Undo merge





# Demo:

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



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- Support by email (M-F 9am-7 pm ET)
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# Questions & Answers



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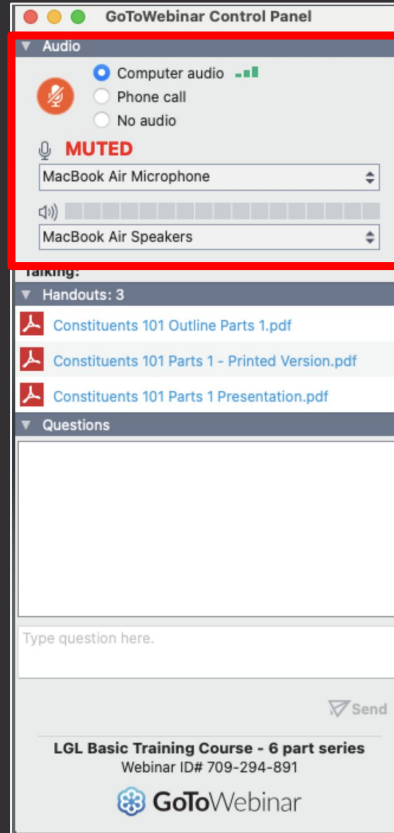


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# Constituents 101:

## 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)

## 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](#)



Save this search

[New Search](#)



# Advanced Searches

## Multiple criteria Constituent search:

### Advanced Search

Show constituents where

*All of the following are true*

☐ Single Gift Amt.  \$ 1000

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

☐ Can send mail? ☒

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

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



# Advanced Searches

## Multiple criteria Constituent search with Advanced option:

**Advanced Search**

Show constituents where

*All of the following are true*

×

Single Gift Amt.

▼

is greater/equal

▼

\$ 1000

×

Gift types

▼

include any

▼

Gift Edit **Status:** Any

▼

×

Can send mail?

▼

✓

and not

▼

×

Groups

▼

includes any

▼

Board Member Edit

Save this search

[New Search](#)



# 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



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