


LGL ONBOARDING checklist



Use this checklist to get up and running with Little Green Light.

 Click on any item for more detailed information.

Step 1

SET UP YOUR LGL ACCOUNT

- [Create an LGL account](#)
- [Subscribe to LGL](#)
- [Add users to account](#)
- [Personalize your account](#)
- [Set addressee and salutation preferences](#)
- [Turn on address verification](#)
- [Enable LGL Email](#)
- [Activate LGL Forms](#)

Step 2

MANUALLY ADD DATA

- [Add a constituent record for yourself](#)
- [Add a gift to your constituent record](#)
- [Review use of Constituent Categories](#)
- [Add a new Constituent category](#)
- [Review gift coding options](#)
- [Create 5-10 new constituent records](#)
- [Add gifts to those records with gift coding](#)

Step 3

ACKNOWLEDGE GIFTS

- [Create a printed acknowledgment template](#)
- [Create an email acknowledgment template](#)
- [Apply an ack template to a gift record](#)
- [Add an image to your mailings and emails](#)
- [Learn to use LGL merge fields in mailings and emails](#)

Step 4

IMPORT HISTORICAL DATA

- [Preparing for migration](#)
- [Compare your import file to a sample file](#)
- [Using the Flex Importer](#)
- [LGL Data Dictionary](#)

LGL TRAINING & SUPPORT

We provide a variety of free resources to help you get the most out of your LGL account. Visit the [Help page](#) in your LGL account to access them all or click on each item to learn more.

Live webinars

[LGL Introductory Tour](#)

[LGL Basic Training course](#)

[Q&A sessions with LGL staff](#)

On demand resources

[LGL Knowledge Base](#)

[LGL Video Library](#)

[LGL User Community](#)

[LGL Blog](#)

Live email support

[LGL Support](#)

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