

LGL Basic Training Constituents 101

Presented by Robyn Gallagher
Assisted by Emily Fitzsimmons

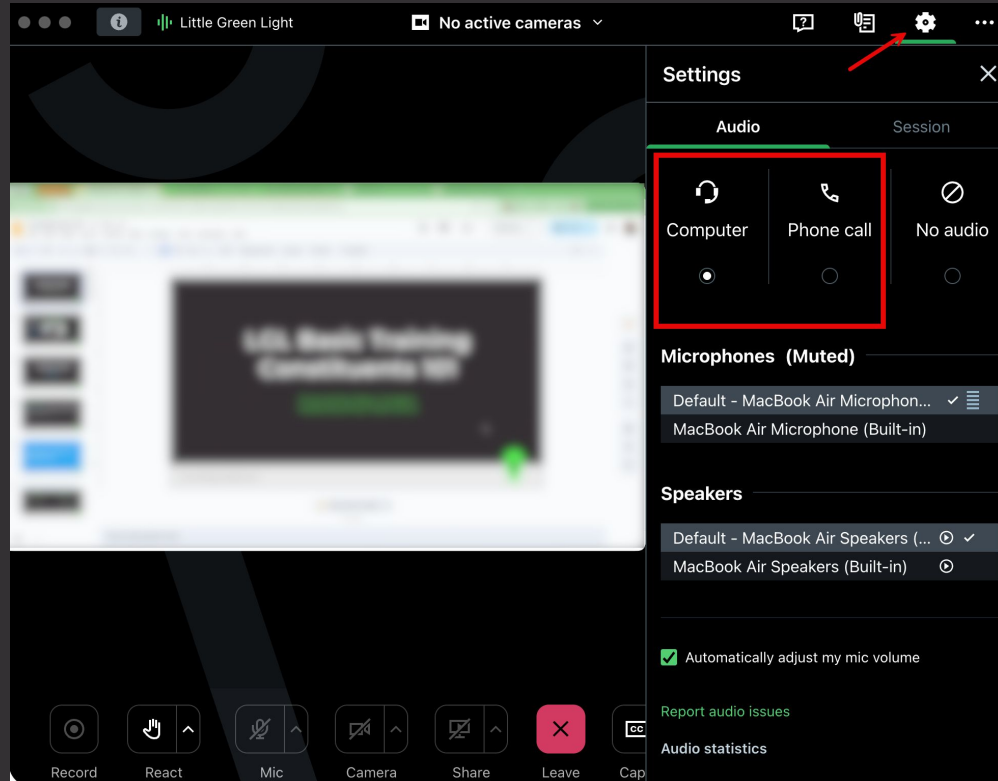


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LGL Basic Training

Constituents 101:

Part 1

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What we'll cover:

The Constituent Record : How to create and edit Constituent records, enter two 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:

The screenshot shows the 'Settings' menu in the top navigation bar, with 'Subscription settings' highlighted. Under 'Subscription settings', the 'General' tab is selected. The 'General' tab contains a 'Constituent Names' section with a 'Save' button. To the right of the 'Constituent Names' section, there is a list of settings that control how LGL will put together addressee and salutation information based on inputs to the main constituent name fields. Examples are provided for formal and informal salutations and addressees. Below this, there are three sections: 'General' with three checked checkboxes, 'Salutation style' with a dropdown menu set to 'Informal (e.g. John)', 'Addressee style' with a dropdown menu set to 'Formal (e.g. Mr. John Smith)', and 'and style' with a dropdown menu set to '✓ and (e.g. John and Jane Smith)'. A 'Save' button is located at the bottom left of the 'Constituent Names' section.

Home ▾ Constituents ▾ Fundraising ▾ Activity ▾ Mailings ▾ Forms ▾ **Settings ▾**

Subscription settings Menu Items Integration Settings Integration Queue

Subscription settings

General >

- Contact information
- Look & feel
- Gift settings

Constituent Names

Save

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)

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

Formal (e.g. Mr. John Smith) ▾

and style

✓ and (e.g. John and Jane Smith)
& (e.g. John & Jane Smith)

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



Demo:

**Add a new Individual record and a
new Organization record**



Address Verification:

- [Settings > Subscription Settings > General](#)

Address Verification, Deduplication, and Cleanup

Status: Inactive

[Activate Address Verification](#)

This service uses the [SmartyStreets](#) address verification service to determine if your US-based addresses are deliverable by the US Postal Service. Verified addresses will be geocoded, and, optionally, normalized (Avenue becomes Ave, Street becomes St, and so on). Turn this on by clicking the 'Activate Address Verification' button above

[Learn more](#) in our Knowledge Base.

Address Deduplication and Cleanup

Enable this setting to automatically remove duplicate mailing addresses within an individual constituent record, leaving only one copy of each unique address. This is an ongoing cleanup process that will run once per day, automatically.

☐ Deduplicate mailing addresses automatically



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

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



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

Addressee/Label Name	Salutation	Annual report name
Mike and Carol Brady	Mike and Carol	Mike and Carol Brady
Alt. addressee	Alt. salutation	Honorary name
Mike Brady	Mike	Mr. and Mrs. Mike Brady
First name	Last name	Middle Name
Mike	Brady	--
Employer	Job title	
--	--	
Birthday	Nicknames	
-- 📅	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) [i 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



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)
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Questions & Answers



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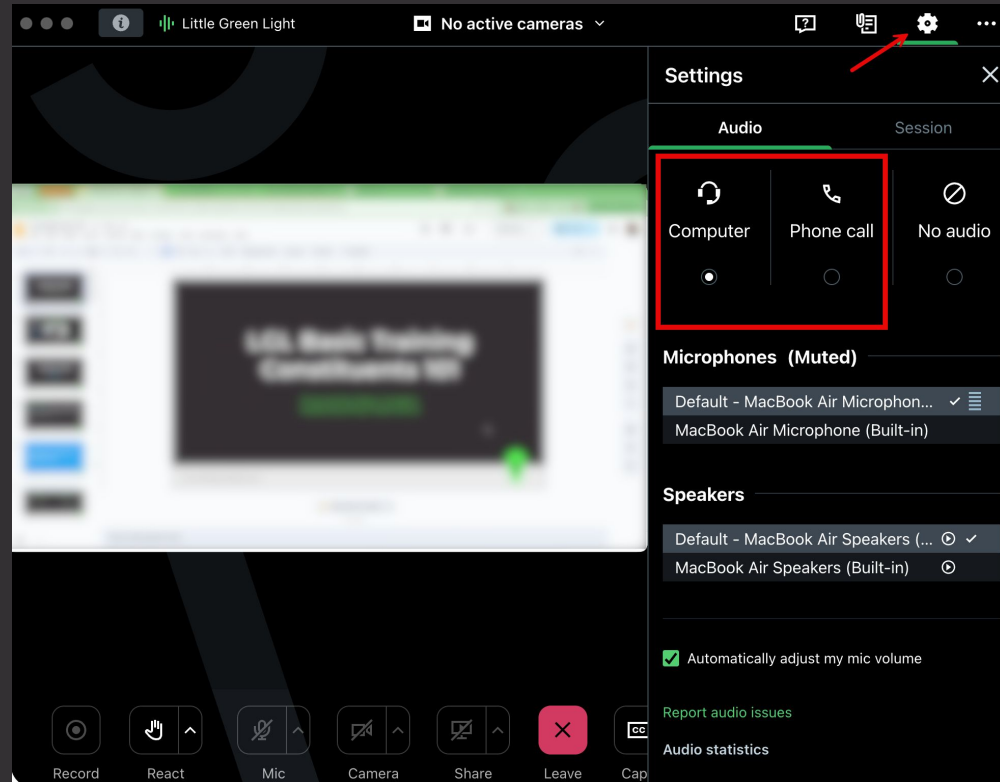


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Constituents 101:

Part 2

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What we'll cover:

Using Constituent Records : How to manage and use Constituent categories, including bulk editing them, perform simple and advanced constituent searches, and how to create lists.



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?

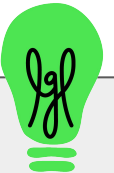


[Add more criteria](#) • [Advanced options](#)



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?

☒

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

and not

☐

Groups

includes any

[Board Member](#) [Edit](#)

[Add more criteria](#) · [Advanced options](#) · [Remove query](#)

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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