Little Green Light

Instruction and Reference Guide



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Basics

Little Green Light (LGL), a donation program at TechSoup provides cloud-based donor management CRM software to eligible nonprofits, charities, and public libraries. You can use this service to track information of donors.

Autism Tree Project



Autism Tree uses Little Green Light in our daily office operations to track information on all our families, volunteers, donors and everyone else who makes up our ATPF community!

The seven categories in the home screen are:

Home: An overview of events

Constitutes: All contact info is stored here

Fundraising: Everything money related is here

Activity:

Mailings: All mass emails can be sent here

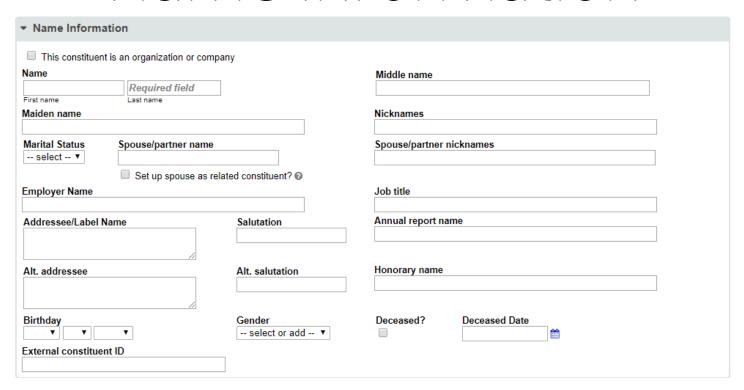
Forms: Event RSVP's can be sent here

Settings: Configure data

*We will be primarily be focusing on the Constitutes tab!



Name Information

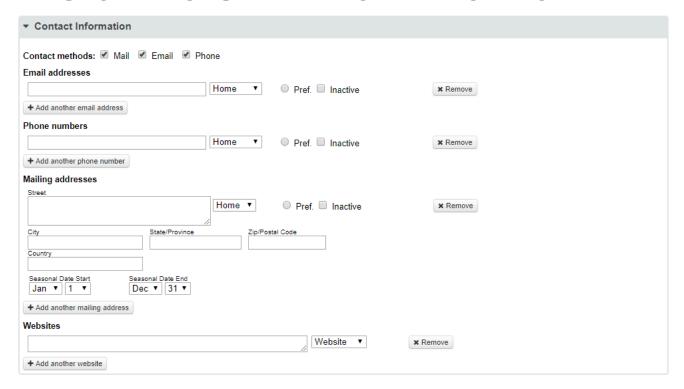


Name information allows you to input names of constitutes.

- If constitutes are already inputted into the database then a blue bar will show that there is matching information with the constitute you are trying to make



Contact Information



Contact Information allows you to input any contact information given to you.

- When looking at data make sure that you input everything that is given such as phone numbers and emails. You can select the classification of the info weather it be home, work, etc



Categories & Constant Contact



Categories:

GROUPS: Here are the different programs as well as special events
Role in Organization: This shows us how the community is involved in our organization
Communication Tags: This shows us how we should contact them
Constant Contact: Shows is if they are a part of the Master Email List

In the categories section, you are able to identify specific programs, events, roles, and communication preferences for each constituent

- Tip: When entering a new parent, you have the option to select any ATPF programs in Groups so that they receive emails about specific upcoming program events



Child Info

▼ Child Info	
Child 1 - Name Child 1 - Diagnosis Narrow Child 1 - Diagnosis Show all ADD ADD ADHD	Child 1 - Date of Birth Child 2 - Name
Child 2 - Date of Birth	Child 2 - Diagnosis Narrow Child 2 - Diagnosis Show all ADD ADD
Child 3 - Name	Child 3 - Date of Birth
Child 3 - Diagnosis ADHD At Risk Autism High Functioning Autism Epilepsy	Child 4 - Name
Child 4 - Date of Birth	Child 4 - Diagnosis Sibling Typical New Value(s)

Child info allows you to input the name, date of birth, and the child's diagnosis.

Tip: Some kids will have multiple diagnoses – you have the option to select all that apply! For siblings, you have the option to select Sibling & Typical



Overview

Let's give it a try! See exammple constituent below:

Intake Date: 2/17/19

Mother's Name: Mom

Father's Name: Dad

Marital Status: Married

Address: 1234 This isn't an address street

Home Phone: (619) 123-4567

Cell Phone: (619) 987-6543

Email: ilikeemails@gmail.com

Child Name: Child

DOB: 1/1/11

Age: 8

Gender: Boy

Diagnosis: Autism

Sibling: Child v.2

Singling DOB: 2/2/02

Top 3 Areas of Concern:

1.) speech

2.) tantrums

3.) picky eater



Overview

▼ Name Information				
This constituent is an organization or compa	nv			
Name	,	Middle name		
Mom wow	7	Middle Hallie		
First name Last name	J			
25 matching constituents. Show results View in	n new tab			
Maiden name		Nicknames		
✓ Set up spouse as related constituent?				
Spouse Name				
Dad Q Lookup	+ Add new			
Employer Name		Job title		
	0.1.4.4	Annual considerations		
Addressee/Label Name Mom wow	Salutation Mom	Annual report name Mom wow		
Plom Wow	WOIII	WOW WOW		
Alt. addressee	Alt. salutation	Honorary name		
//				
Birthday	Gender	Deceased Date		
	select or add ▼	□ <u> </u>		
External constituent ID				
▼ Contact Information				
Contact methods: Mail Email Pho		down manu		
Email addresses		down menu		
ilikeemails@gmail.com	Home ▼ Pref. □ Ina	active × Remove		
+ Add another email address				
Phone numbers				
(619) 123-4567	Home ▼ ● Pref. □ Inc	active x Remove		
(619) 987-6543	Mobile ▼ ○ Pref. □ Inc	active × Remove		
+ Add another phone number				
Mailing addresses				
Street				
1234 This isn't an address street	Home ▼ ● Pref. □ In	nactive x Remove		
City State/Province	Zip/Postal Code			
Chula Vista CA	91914			
Country				
Secretary Data State				
Seasonal Date Start Jan ▼ 1 ▼ Seasonal Date End Dec ▼ 31 ▼				
+ Add another mailing address				
Websites				
	Websi	ite ▼ x Remove		
+ Add another website				
▼ Constant Contact				
Constant Contact Status None defined		Constant Contact Lists		
None delined		ATPF MASTER EMAIL LIST		



Overview

FOUNDATION

