Little Green Light

Instruction and Reference Guide

Contents:

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

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

Dashboard   Team Members   Reports   My searches   Flex Importer

Customize Dashboard

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!

AUTISM
tree project
FOUNDATION

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

AUTISM
tree project
FOUNDATION

Child Info

Child Info

Child 1 - Name

Child 1 - Date of Birth

Child 1 - Diagnosis

Narrow Child 1 - Diagnosis

Show all

☐ ADD
☐ ADHD

Child 2 - Name

Child 2 - Date of Birth

Child 2 - Diagnosis

Narrow Child 2 - Diagnosis

Show all

☐ ADD
☐ ADHD

Child 3 - Name

Child 3 - Date of Birth

Child 3 - Diagnosis

☐ ADHD
☐ At Risk
☐ Autism
☐ High Functioning Autism
☐ Epilepsy
☐ Reactive Attachment Disorder

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

AUTISM
tree project
FOUNDATION

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

AUTISM
tree project
FOUNDATION

Overview

Name Information

☐ This constituent is an organization or company

Name

Mom	wow
First name	Last name

Middle name

25 matching constituents. [Show results] [View in new tab]

Maiden name

Nicknames

☑ Set up spouse as related constituent? ⓘ
Spouse Name

Dad [🔍 Lookup] [➕ Add new]

Employer Name

Job title

Addressee/Label Name
Mom wow

Salutation
Mom

Annual report name
Mom wow

Alt. addressee

Alt. salutation

Honorary name

Birthday
▼ ▼ ▼

Gender
-- select or add -- ▼

Deceased?
☐

Deceased Date
📅

External constituent ID

Contact Information

Contact methods: ☑ Mail ☑ Email ☑ Phone

Email addresses

drop down menu ←

| ilikeemails@gmail.com | Home ▼ | ◉ Pref. ☐ Inactive | ✖ Remove |

[➕ Add another email address]

Phone numbers

| (619) 123-4567 | Home ▼ | ◉ Pref. ☐ Inactive | ✖ Remove |
| (619) 987-6543 | Mobile ▼ | ○ Pref. ☐ Inactive | ✖ Remove |

[➕ Add another phone number]

Mailing addresses

Street
| 1234 This isn't an address street | Home ▼ | ◉ Pref. ☐ Inactive | ✖ Remove |

City
Chula Vista

State/Province
CA

Zip/Postal Code
91914

Country

Seasonal Date Start
Jan ▼ 1 ▼

Seasonal Date End
Dec ▼ 31 ▼

[➕ Add another mailing address]

Websites

| | Website ▼ | ✖ Remove |

[➕ Add another website]

Constant Contact

Constant Contact Status
None defined

Constant Contact Lists
☐ ATPF MASTER EMAIL LIST

AUTISM
tree project
FOUNDATION

Overview

Child Info

Child 1 - Name
Child

Child 1 - Date of Birth
1/1/11

Child 1 - Diagnosis
☑ Autism

Narrow Child 1 - Diagnosis

Show all

Child 2 - Name
Child v.2

Child 2 - Date of Birth
2/2/02

Child 2 - Diagnosis
☑ Sibling

Narrow Child 2 - Diagnosis

Show all

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)

Groups
☐ 2018 Intake
☐ 2018 Luncheon
☑ 2019 Intake
☐ 2019 LEAD San Diego Team
☐ ATPF Bay Area Parent Mentor Program

Role in Organization
☑ Parent

Narrow Role in Organization

Show all

Communication Tags
☑ Spanish Speaker

Narrow Communication Tags

Show all

Contact types
Primary ▼   ☐ Gives anonymously?

General Information

Background Info
Top 3 Areas of Concern:

AUTISM
tree project
FOUNDATION