

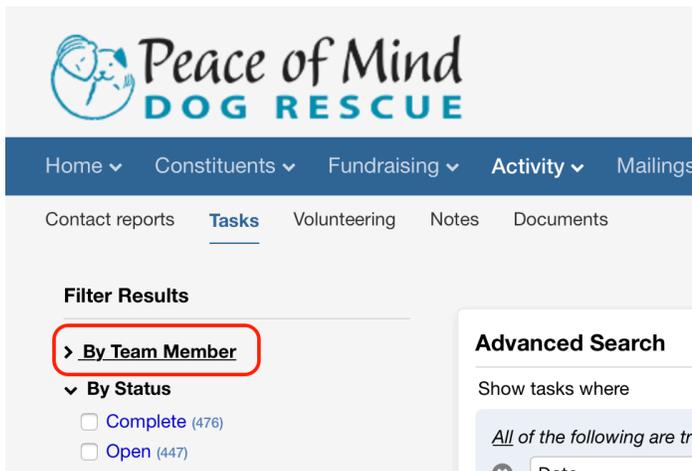
Processing a Follow Up Contact in LGL

The examples below use Pam Bonsper as the team member. Wherever her name appears in these examples, your name will/should appear when you follow these steps.

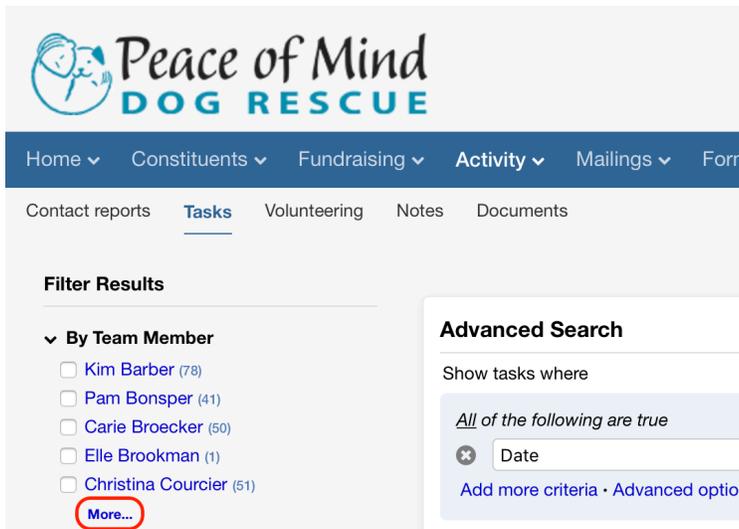
1. Visit <https://www.littlegreenlight.com> and log in to your LGL account (if you're not already logged in).
2. Move the mouse to "Activity" in the blue bar across the top of the page, and then click on "Tasks":



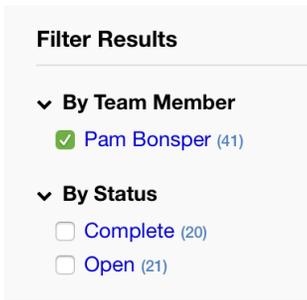
3. On the left side of the page, under "Filter Results", click on "By Team Member":



4. A list of team members appears. If your name isn't in the list, click "More..." to see more names.



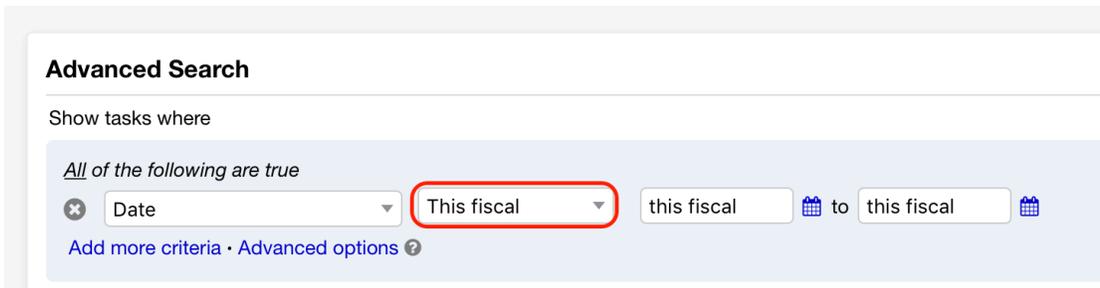
5. Click on your name in the list. This will put a checkmark next to your name and hide the other names:



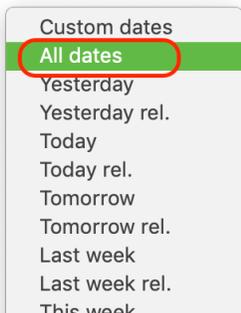
6. Click on “Open” so that completed tasks are hidden in the list:



7. At the top of the Advanced Search section, the date range will initially be set to the current fiscal year. But we don't want that — we want to see all tasks no matter what the date. Click on the first button that says “This fiscal”:



8. Choose “All dates” from the menu that pops up. It will be the second item in the menu, way up near the top:



9. Click the “Search” button to update the list of tasks:

Advanced Search

Show tasks where No saved searches are available

All of the following are true

Date to

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

Filters

Status: Open
 Assigned to: Pam Bonsper

10. Now there should be a list of your assigned tasks, sorted by due date. Any tasks that have due dates in the past will show “Follow up contact” on a red background. You can find the tasks with the oldest due dates by scrolling down to the end of the list:

Salinas, CA 93906 USA ID: 1200962	0.0 hours spent <input type="button" value="⊙"/> Assigned to Pam Bonsper <input type="button" value="✎"/> Due on 09/3/19 <input type="button" value="📅"/>	
Mata, Alejandro (831)840-6670 paolaromero772@yahoo.com 296 Hushbeck Avenue Watsonville, CA 95076 USA ID: 1212222	<input checked="" type="checkbox"/> Denver Ventura, #1685 9/3/2019 Sent 2nd email. 0.0 hours spent <input type="button" value="⊙"/> Assigned to Pam Bonsper <input type="button" value="✎"/> Due on 09/3/19 <input type="button" value="📅"/>	<input type="button" value="⚙️ Actions"/>
Starzynski, Debbie 831-375-0228 debstarzynski@comcast.net 1 Dune Crest Avenue Monterey, CA 93940 USA ID: 1176232	<input checked="" type="checkbox"/> Bambie, #1816 9/3/2019 Sent 2nd email. 0.0 hours spent <input type="button" value="⊙"/> Assigned to Pam Bonsper <input type="button" value="✎"/> Due on 09/3/19 <input type="button" value="📅"/>	<input type="button" value="⚙️ Actions"/>
Cavalier, Eileen 831 713 6149 eileenc722@gmail.com P. O. Box 8054 Santa Cruz, CA 95061 Santa Cruz ID: 1206882	<input checked="" type="checkbox"/> Swikibee, #1827 9/3/2019 Sent 2nd email. 0.0 hours spent <input type="button" value="⊙"/> Assigned to Pam Bonsper <input type="button" value="✎"/> Due on 09/3/19 <input type="button" value="📅"/>	<input type="button" value="⚙️ Actions"/>

11. At this point you would choose one of the follow-up contact tasks in your list to process. For this example, we are going to use the 2nd-to-last item in the list pictured above, which is the follow-up for Bambie, at the home of Debbie Starzynski. In order to see more about past contacts with Debbie, the next step is to go to her page in LGL. Click on her name to visit her page:

<p>Watsonville, CA 95076 USA ID: 1212222</p> <p>Starzynski, Debbie 831-375-0226 debstarzynski@comcast.net 1 Dune Crest Avenue Monterey, CA 93940 USA ID: 1176232</p>	<p>0.0 hours spent</p> <p>Assigned to Pam Bonsper Due on 09/3/19</p> <p>Follow up contact <input type="checkbox"/> Bambie, #1816</p> <p>9/3/2019 Sent 2nd email.</p> <p>0.0 hours spent</p> <p>Assigned to Pam Bonsper Due on 09/3/19</p> <p>Actions</p>
<p>Cavalier, Eileen 831 713 6149 eileenc722@gmail.com P. O. Box 8054 Santa Cruz, CA 95061 Santa Cruz ID: 1206882</p>	<p>Follow up contact <input type="checkbox"/> Swikibee, #1827</p> <p>9/3/2019 Sent 2nd email.</p> <p>0.0 hours spent</p> <p>Assigned to Pam Bonsper Due on 09/3/19</p> <p>Actions</p>

12. Scroll to the bottom of this person's page and click "Task" in the "Filter activity" section on the left side of the page:

Related activity + Add contact rpt. + Add note + Add gift + Add task + More actions

Filter activity

- By Type
 - Task (1)
- By Status
 - Open (1)
- By Category
 - Follow up 1st call (1)

All Activities > Task

Search activities Custom dates to 2019-10-18

1 result

Activity View: Compact Expanded

Follow up contact [Bambie, #1816](#) **Actions**

9/3/2019 Sent 2nd email.

0.0 hours spent

Assigned to Pam Bonsper Due on 09/3/19

13. To make sure you're seeing all previous follow-up contacts, change the displayed date range to "All dates" similarly to step 7 & 8 above:

Related activity + Add contact rpt. + Add note + Add gift + Add task + More actions

Filter activity

- By Type
 - Task (1)
- By Status
 - Open (1)
- By Category
 - Follow up 1st call (1)

All Activities > Task

Search activities Custom dates to 2019-10-18

- Custom dates
- All dates
- Yesterday
- Yesterday rel.
- Today
- Today rel.
- Tomorrow
- Tomorrow rel.
- Last week
- Last week rel.
- This week
- This week rel.
- Next week
- Next week rel.
- Last month
- Last month rel.

1 result

Activity View: Compact Expanded

Follow up contact [Bambie, #1816](#) **Actions**

9/3/2019 Sent 2nd email.

0.0 hours spent

Assigned to Pam Bonsper Due on 09/3/19

14. If there were any previous follow-up contacts, they would appear in the list here. You might want to review them to see what the person said previously about this dog. At this point you might also want to go to Shelterluv and learn more about this dog's history. Instructions for how to do that are in a separate document.

In this example, there weren't any previous contacts, so the current task is the only one in the list. Now click "Actions" and choose "Edit follow up contact" from the menu that appears:

The screenshot shows the 'Related activity' section of a software interface. At the top, there are buttons for '+ Add contact rpt.', '+ Add note', '+ Add gift', '+ Add task', and 'More actions'. Below this is a 'Filter activity' sidebar with options for 'By Type' (Task (1)), 'By Status' (Open (1)), and 'By Category' (Follow up 1st call (1)). The main area displays 'All Activities > Task' with a search bar and date filters. A single activity is listed: 'Follow up contact' for 'Bambie, #1816', dated '9/3/2019', with '0.0 hours spent' and assigned to 'Pam Bonsper'. An 'Actions' menu is open over this activity, with 'Edit follow up contact' highlighted in a red box. Other options in the menu include 'Add a comment', 'Edit', and 'Delete follow up contact'.

15. The editing screen for this task now appears. It looks something like this:

The screenshot shows the 'Edit task: Bambie, #1816' form. At the top right, there are 'Save' and 'Cancel' buttons. The form is organized into sections: 'Task Information' (expanded), 'Constituent' (Starzynski, Debbie, ID: 1176232), 'Task Name' (Bambie, #1816), 'Type' (Follow up contact), 'Team Member' (Pam Bonsper), 'Send reminders?' (checked), 'Due date' (Specific date, 2019-09-03, with a calendar icon and a 'recurring?' checkbox), 'Hours' (0.0), 'Status' (Is complete? checkbox), 'Priority' (High priority checkbox), and 'Description' (9/3/2019 Sent 2nd email).

16. In this example, you (well, Pam) had left a note for herself in the Description field when she sent email to the dog's person. This is a useful thing to do when you send email or leave a voice mail. When you have heard back from the person or talked to them directly, replace the description with the communication you received about the dog. If you got an email from the person, you can paste its contents here. If you talked to the person on the phone, you can explain what they said. In either case, start out with today's date.

Description

9/18/2019 Debbie wrote back: "Bambie is doing great! She is such a good girl!"

17. Now that you've recorded the communication, it's time to mark the follow-up as complete. The first step is to change the "Due Date". It's still called "Due Date" but we're using that to mean "date that communication was received". The easiest way to do this is to pick "Today" from the pop-up menu you get when you click on "Specific date":

The screenshot shows a task form with a dropdown menu open over the "Specific date" field. The dropdown menu lists options: "Set date", "Today" (highlighted), "Tomorrow", "This week", "Next week", "Next month", "Next year", and "Specific date". The "Specific date" field contains "2019-09-03". Other fields include "Constituent" (Starzynski, Debbie), "Task Name" (Bambie, #1816), "Team Member" (Pam Bonsper), "Send reminders?" (checked), "Hours" (0.0), "Status" (Is complete?), and "Priority" (High priority).

18. Next, click on "Is complete?" to put a check mark next to it:

The screenshot shows the task form with the "Is complete?" checkbox checked. The "Due date" dropdown is set to "Today". Other fields are the same as in the previous screenshot.

19. Now it's time to set up another follow-up contact for next year. Start by clicking "Add related task":

The screenshot shows the "Related Tasks" section with a blue instruction bar: "Add 1 or more relevant/related tasks by clicking on the 'Add related task' button." Below the instruction bar is a button labeled "+ Add related task" which is highlighted with a red circle.

20. You will see an expanded area to record the future task. The first step is to make sure the appropriate team member is assigned. Typically this will be you, the person doing the current follow-up contact. If the displayed team member name is wrong, click on it and choose an appropriate one:

▼ Related Tasks Click to close

Add 1 or more relevant/related tasks by clicking on the "Add related task" button.

Task Name Team Member Team Member
Pam Bonsper Type Due date ✕ Remove

Priority
 High priority

Description

+ Add related task

21. The task name should be the dog's name and ID number. It's easiest to copy and paste this from the previous follow-up contact, if there was one:

Task Name Team Member Type Due date

22. To set the Type, click on “— choose one —” and pick “Follow up contact” from the menu:

Task Name Team Member Type Due date

Priority
 High priority

Description

+ Add related task

Type

- ✓ -- choose one --
- Follow up contact
- In Person
- Phone
- Email
- General Comment
- Helping Paw vol.
- Perpetual Care
- Photo of dog
- _____
- Add new...

23. Now set the date for the next contact to be a year from this contact. In this case, email was received from the dog's person on 9/18/2019 so we want to set the next contact for 9/18/2020. Click the little calendar icon next to “Due date” to bring up the date chooser:

Due date ✕ Remove

< September 2019 >

S	M	T	W	T	F	S
25	26	27	28	29	30	31
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	1	2	3	4	5

@ :

Today | Now | OK | Clear

24. In the date chooser, first click on the year and choose the next year from the menu. (If you change the day of the month first, then change the year, your first change will be lost.)



25. Next, click on the day of the month:



26. Next, click "OK" to confirm:

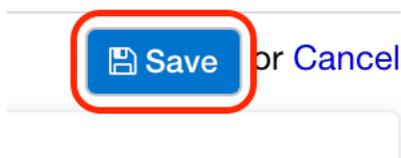


27. Finally, make sure that the “Notify” list at the bottom of the page only has one person checked, and that person is you. (Sometimes other people are automatically checked but shouldn’t be.):

Notify

- | | | | |
|--|---|---|--|
| <input type="checkbox"/> All administrator users | <input type="checkbox"/> All gift entry users | <input type="checkbox"/> All fundraiser users | <input type="checkbox"/> All volunteer users |
| <input type="checkbox"/> Carie Broecker | <input checked="" type="checkbox"/> Pam Bonsper | <input type="checkbox"/> Andrew Donati | <input type="checkbox"/> Barbara Allen |
| <input type="checkbox"/> Allison McKee | <input type="checkbox"/> Karen Bowen | <input type="checkbox"/> Cathy Heape | <input type="checkbox"/> Kim Barber |
| <input type="checkbox"/> Monica Rua | <input type="checkbox"/> Elle Brookman | <input type="checkbox"/> Donna Karolchick | <input type="checkbox"/> Marty Becker |
| <input type="checkbox"/> Me | <input type="checkbox"/> Alyssa Celaya | | <input type="checkbox"/> Tori Bunch |
| | <input type="checkbox"/> Jessica Esparza | | <input type="checkbox"/> Christina Courcier |
| | <input type="checkbox"/> Linda Gabrielson | | <input type="checkbox"/> Joyce Ann Davenport |
| | <input type="checkbox"/> Marilee Geyer | | <input type="checkbox"/> Janis Fitzhugh |
| | <input type="checkbox"/> Kathy Henney | | <input type="checkbox"/> Sarah Glendon |
| | <input type="checkbox"/> Amy Krivis | | <input type="checkbox"/> Monica Gordon |
| | <input type="checkbox"/> Jan Neal | | <input type="checkbox"/> Suzanne Hill |
| | <input type="checkbox"/> Francie Newfield | | <input type="checkbox"/> Ed Schrenzel |
| | <input type="checkbox"/> Tracey Pepper | | <input type="checkbox"/> Kathleen Seibel |
| | <input type="checkbox"/> Robert Seibel | | <input type="checkbox"/> Karen Sheppard |
| | <input type="checkbox"/> Bryan Van Loh | | <input type="checkbox"/> Ashley Wayland |
| | <input type="checkbox"/> Angela Zepp | | |

28. Now click “Save” to save all of the changes you have made:



29. Clicking “Save” will bring you back to the list of tasks associated with this dog’s person. Now you should double-check that you have correctly made the intended changes. Check that the old task has a checkmark next to its name, and that it contains the text you entered in step 16, and that its date is the date that you heard from the dog’s person. Also check that the new task does not have a checkmark, and that its date is one year in the future from the old task. Here is what our example looks like at this point:

Related activity + Add contact rpt. + Add note + Add gift + Add task + More actions

Filter activity

- ▼ By Type
 - Task (2)
- ▼ By Status
 - Completed (1)
 - Open (1)
- ▼ By Category
 - Follow up contact (2)

All Activities > Task

Search activities All dates to

Results 1 - 2 of 2

Activity	View: <input type="radio"/> Compact <input checked="" type="radio"/> Expanded
<div style="display: flex; justify-content: space-between; align-items: flex-start;"> <div style="background-color: #0070c0; color: white; padding: 2px 5px; font-weight: bold;">Follow up contact</div> <div style="flex-grow: 1;"> <div style="display: flex; justify-content: space-between; align-items: flex-start;"> <div style="font-weight: bold;">Bambie, #1816</div> <div style="font-size: small;">0.0 hours spent <input type="text"/></div> </div> <div style="font-size: x-small; margin-top: 2px;"> Source: Bambie, #1816 (Follow up contact) Assigned to Pam Bonsper <input type="text"/> Due on 09/18/20 <input type="text"/> </div> </div> <div style="font-size: x-small; text-align: right;"><input type="button" value="Actions"/></div> </div>	<input type="checkbox"/>
<div style="display: flex; justify-content: space-between; align-items: flex-start;"> <div style="background-color: #0070c0; color: white; padding: 2px 5px; font-weight: bold;">Follow up contact</div> <div style="flex-grow: 1;"> <div style="display: flex; justify-content: space-between; align-items: flex-start;"> <div style="font-weight: bold;">Bambie, #1816</div> <div style="font-size: small;">0.0 hours spent <input type="text"/></div> </div> <div style="font-size: x-small; margin-top: 2px;"> 9/18/2019 Debbie wrote back: "Bambie is doing great! She is such a good girl!" Assigned to Pam Bonsper <input type="text"/> Due on 09/18/19 <input type="text"/> </div> </div> <div style="font-size: x-small; text-align: right;"><input type="button" value="Actions"/></div> </div>	<input checked="" type="checkbox"/>

You have now completely processed this follow-up contact. You can go celebrate, or move on to the next one...