Lighthouse Geek Sheet 5: Update Forms

Sometimes there's information that members can provide themselves, which you might not have, or even be able to enter on Lighthouse.

For these circumstances, we have custom URL forms linked from a contact's record on Lighthouse that let you send them a form and update their own information.

There are currently two forms available:

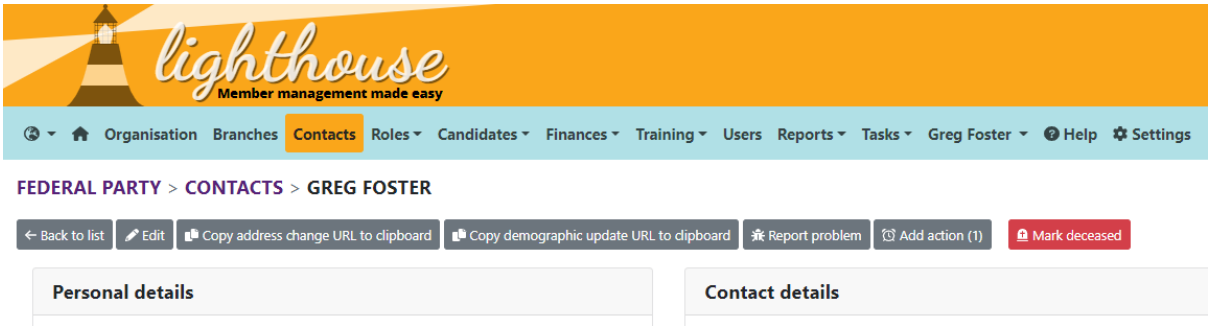
Address Update: which allows a user to update their own postal address by using a form that's unique to them.

Demographic Update: which allows them to update their demographic information and member profile, so you can get the Demographic Dashboard even more accurate.

And here's how we can use them.

Step 1

After logging in to Lighthouse, search for the contact you need to update, and click on their name to open their contact record.



Step 2

In the Action Button row, you'll see two larger grey buttons:

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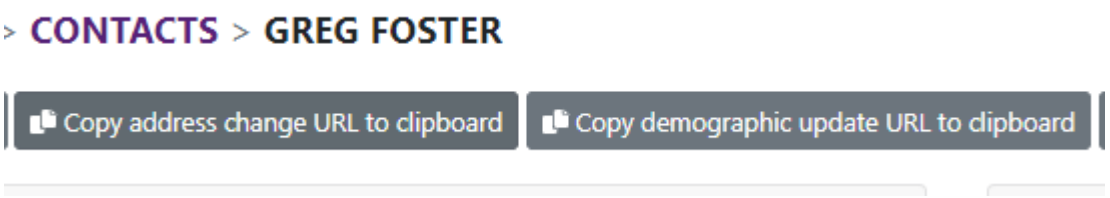

Clicking either of these will copy a a unique URL for the member whose contact record you have open to allow them to either update their address or their demographic information.

That means if you need to do this for more than one person, you will need to click this button on each of their contact records.

You can then paste this URL into an email or other message to the member in question.

After the member clicks on the URL you've sent them, they will be directed to an online form, in which they can fill out their new address details.

This will then automatically update their contact record in Lighthouse, meaning you do not need to do anything else!