



Lighthouse Guide 2: Managing Contacts

Contacts in Lighthouse are any people associated with the organisation that you're logged into. These can be current or former members & supporters, donors, volunteers and people signing up to online campaigns.

The party is working towards pushing people that you may want to target for membership, fundraising or volunteering into Lighthouse and giving you tools to engage with them meaningfully.

Knowing how to manage contacts is therefore extremely important - it's one of the areas of Lighthouse that you'll use the most.

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Permissions Required

	View	Edit	Create
View Contacts	✓		
Search for contacts	✓		
Edit Contacts		✓	
Create Contacts			✓

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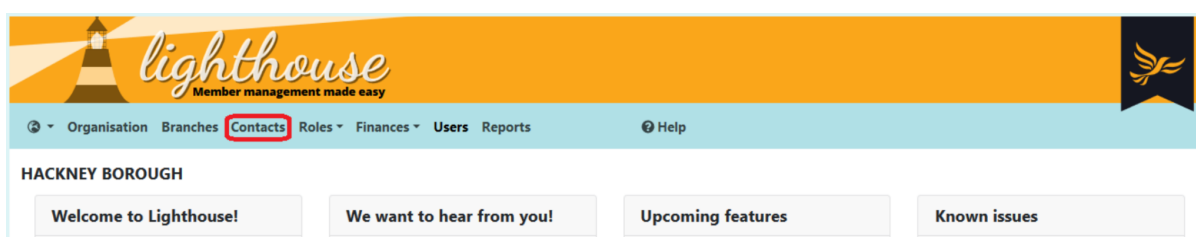
How to view and search for contacts

If you ever need to look up a specific person on Lighthouse, then you'll need to know how to view or search for a contact.

How to view your contacts

Step 1

Make sure that you're logged in to Lighthouse. Then, from the Dashboard page. Click on the "Contacts" tab in the blue menu at the top.



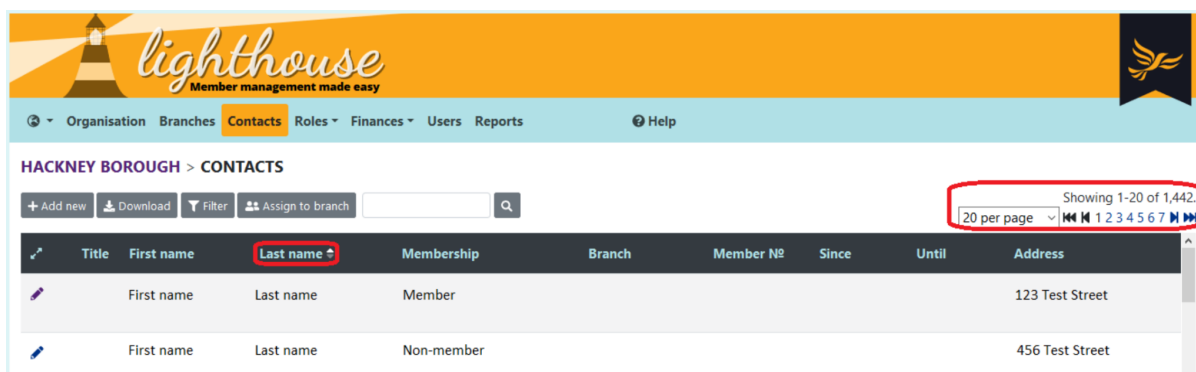
Step 2

This will then load the Contacts tab. In this tab, you can view a list of all contacts - that is, members, supporters, non-members (i.e. recently lapsed members) and donors - related to the organisation that you're logged in to..

As with most tabs or sub-tabs, you'll arrive on the List View. You can scroll down the list using the scroll bars to view more contacts, or click on one of the page numbers on the top right of the page to move through records. You can also scroll from side to side to view additional details for each contact.

You can display up to 100 contacts on a single list view page.

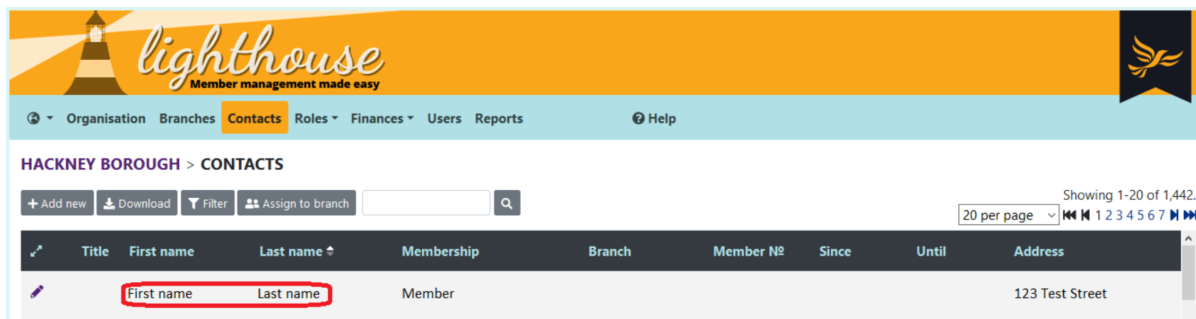
You can also sort contacts by clicking on any of the column titles in the Contacts view. For example, clicking on "Last name" will sort contacts alphabetically by surname.



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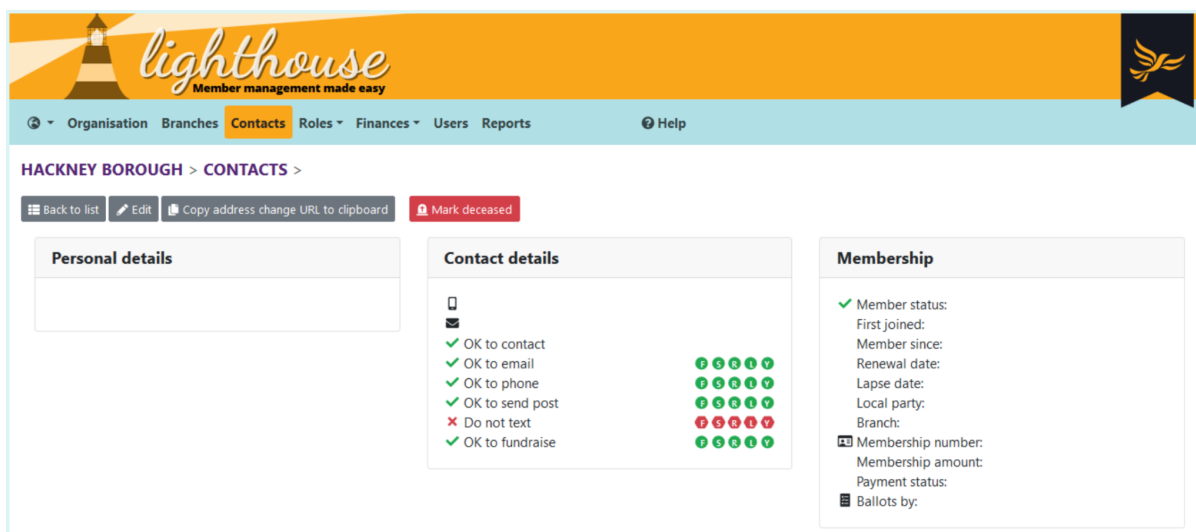
Step 3

To view more details about one of your contacts, click on either their first name or last name in the list. You can also click on the View link.



Step 4

You will be directed to a page showing contact details and membership information for your chosen contact.



How to search for contacts

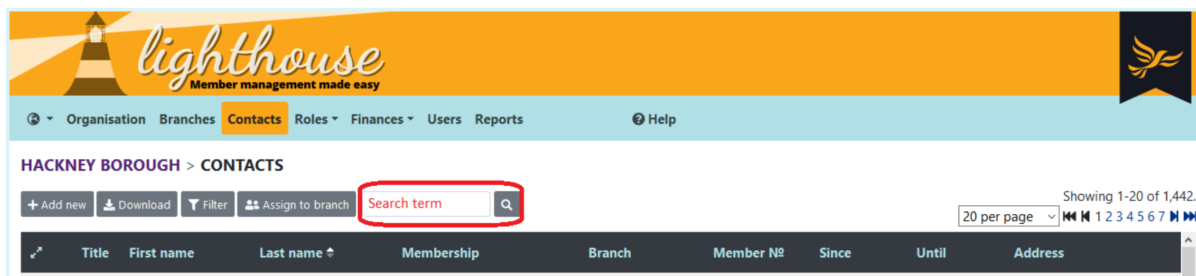
Step 1

Return to the Contacts List view.

Step 2

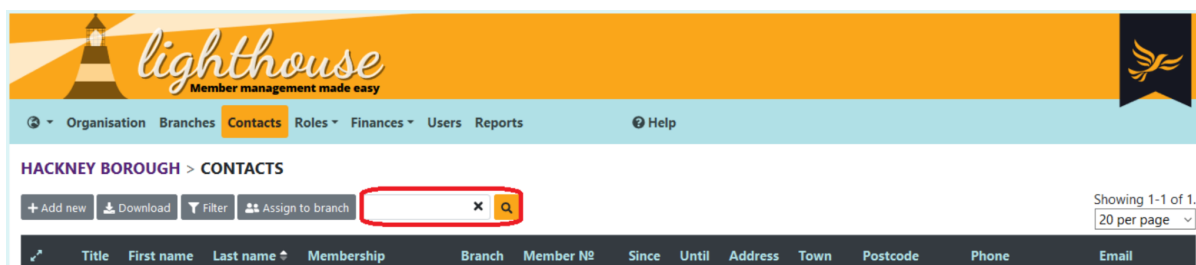
Type in the name of the contact you want to search for in the small white bar next to the "Assign to branch" button. Then either press enter or click on the magnifying glass icon next to the search bar.

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Step 3

Contacts matching your search terms will appear on the screen. If you would like to view your full list of contacts again, click on the small cross which will have appeared at the right of the search bar.



The search looks for exact matches to what you have entered - so if you mis-spell the name you're looking for, it's unlikely that the tool will find it.

How to edit and create contacts

Once we've found a contact, we can then edit them to update their details or fill in missing information. If you have a new person

How to edit your contacts

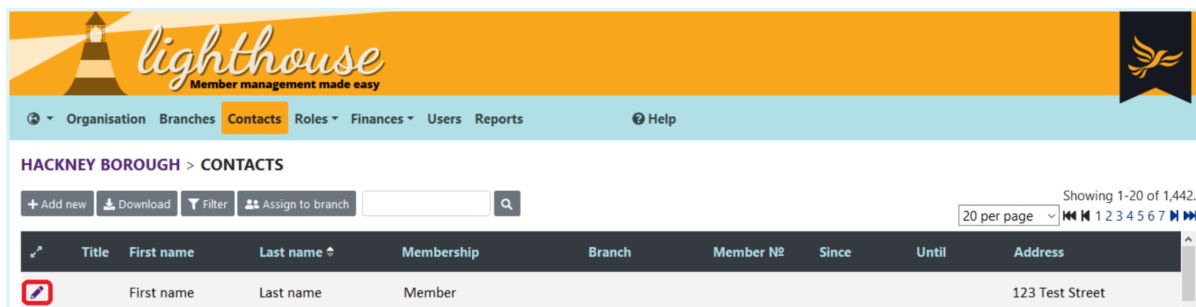
Step 1

Return to the Contacts tab.

Step 2

Locate the contact you want to edit - using the steps outlined in the last stage. Once you have found the contact you would like to edit, click the pencil icon next to their name on the Contacts page.

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Alternatively, you can click on the name of the contact you wish to edit, and then click “Edit” at the top left of the details page for that contact.

Step 3

You will be directed to the “Edit contact” page. You can now update your contact’s details in the fields provided.

Remember that when you begin to type an address, Lighthouse will offer a list of suggestions. Selecting one of these will automatically fill in the correct information for you.

When you have finished editing your contact, click “Update” at the bottom of the page. You will be directed back to the Contacts page, where you can view your updated contact in the list.

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Title First name Last name *

Branch

Start typing the name of an existing branch and select from a list.

Email

Correspondence address *

Primary
 Secondary

Switch the correspondence address to "Secondary" for a term-time or temporary address change.

Unknown at this address

Primary address

Secondary address
Start typing the contact's address or postcode to see suggestions.

Town London

Postcode

Country * gb United Kingdom

Town

Postcode

Country * gb United Kingdom

Main phone *

Home
 Mobile
 Other

Home phone
The contact's home landline number. Use national format (eg 01234 567890) for UK numbers and international format (eg +1 234-567-8901) for non-UK numbers.

Mobile phone
The contact's primary mobile number. Use national format (eg 01234 567890) for UK numbers and international format (eg +1 234-567-8901) for non-UK numbers.

Other phone
For example a work number or secondary mobile or landline. Use national format (eg 01234 567890) for UK numbers and international format (eg +1 234-567-8901) for non-UK numbers.

Electoral number
You can look up this number in Connect.

VF VANID

VANID

Refused to renew membership
 OK to email
 OK to phone
 OK to send post
 OK to fundraise

You can only record the preferences for local campaigning here. To opt in or out of contact from other sections of the party, the member should contact membership@libdems.org.uk.

How to create new contacts

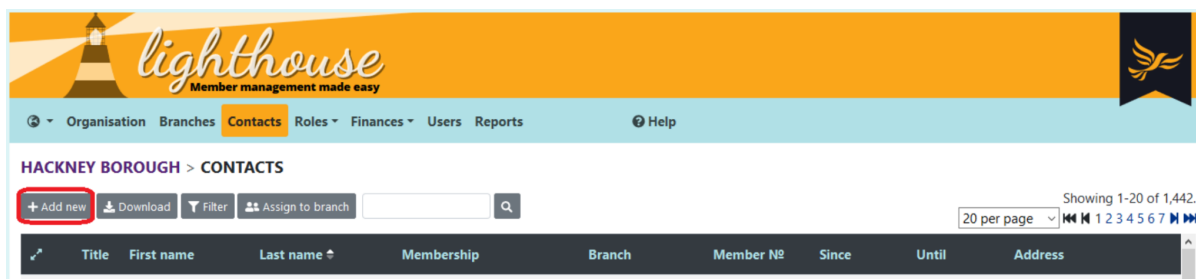
Step 1

Return to the Contact tab.

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Step 2

Click on the “Add new” action button to create a new contact.



Step 3

The “New Contact” page will now load. On this page you can enter information about your new contact, including their name, contact details, and branch.

Note that a list of suggestions will appear when you begin to type an address. When you click on one of these suggestions, it will automatically fill in the correct fields for you.

When you are finished, click “Save” at the bottom of the screen. You will be directed back to the Contacts page, where your new contact will appear in the list.

Alternatively, click “Save and add another” to create another new contact.

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HACKNEY BOROUGH > CONTACTS > NEW

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Title First name Last name *

Branch

Start typing the name of an existing branch and select from a list.

Email

Correspondence address *

Primary
 Secondary

Switch the correspondence address to "Secondary" for a term-time or temporary address change.

Unknown at this address

Primary address
Start typing the contact's address or postcode to see suggestions.

Secondary address
Start typing the contact's address or postcode to see suggestions.

Town

Postcode

Country *

Main phone *

Home
 Mobile
 Other

Home phone
The contact's home landline number. Use national format (eg 01234 567890) for UK numbers and international format (eg +1 234-567-8901) for non-UK numbers.

Mobile phone
The contact's primary mobile number. Use national format (eg 01234 567890) for UK numbers and international format (eg +1 234-567-8901) for non-UK numbers.

Other phone
For example a work number or secondary mobile or landline. Use national format (eg 01234 567890) for UK numbers and international format (eg +1 234-567-8901) for non-UK numbers.

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Related Guides & Geek Sheets

With contacts, we're really only just scratching the surface in this guide. There are loads more useful Guides and Geek Sheets to help you fully understand Contacts. These include:

- [Geek Sheet 1: Membership Information](#)
- [Geek Sheet 2: Contact preferences](#)
- [Geek Sheet 3: Refused to renew](#)
- [Geek Sheet 5: Update forms](#)
- [Geek Sheet 6: New member interests](#)
- [Geek Sheet 8: Marking contacts as deceased](#)