



Managing branches

Last updated: August 2020

What you will learn in this chapter

- [How to create and edit branches](#)
- [How to add contacts to a branch](#)



How to create and edit branches

What you will learn in this guide

- [How to create new branches](#)

- [How to edit existing branches](#)

Permissions needed

	View	Edit	Create
Branches	✓	✓	✓

	View	Edit	Create
Branches	✓	✓	



How to create new branches

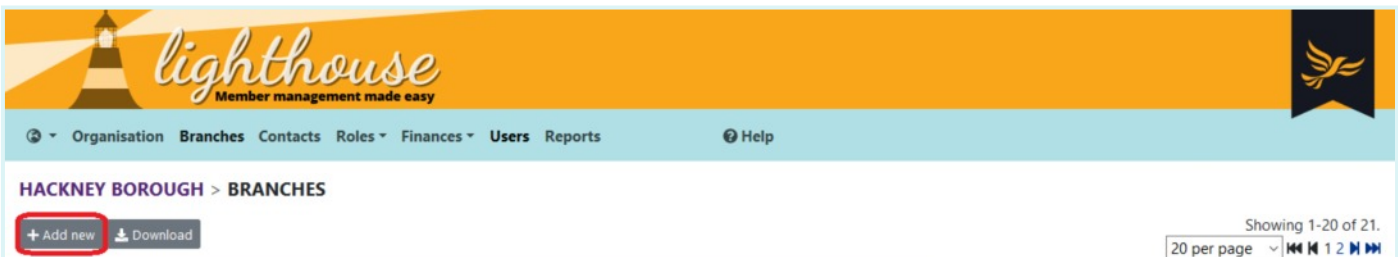
Step 1

After logging into [Lighthouse](#), you will be directed to the Dashboard page. Click on "Branches" in the blue menu at the top.



Step 2

You will be directed to the Branches page, where your current branches will be shown in a list. To create a new branch, click "Add new".



Step 3

Type in the name of the branch in the Name field, and a short code to identify the branch in the Code field. Each branch needs to have its own unique code of up to six characters, which is not shared by any other branch within your local party.

Then click "Save", or "Save and add another" to create another new branch.

The screenshot shows the Lighthouse branch creation form. It has two input fields: 'Name' with the value 'Test Branch 2' and 'Code' with the value '701. TB2'. Below the code field, there is a note: 'Every branch must be assigned a short code (up to 6 characters) which is unique within the local party. Your organisation prefix ("701.") will automatically be added and you should not include it.' At the bottom right, there are three buttons: 'Cancel', 'Save & add another' (highlighted with a red box), and 'Save'.

You will be directed back to the Branches page, where your new branch will be shown in the list. To view details of a branch, click on the name of the branch from this list.



How to edit existing branches

Step 1

After logging into [Lighthouse](#), you will be directed to the Dashboard page. Click on “Branches” in the blue menu at the top of the page to view your current branches in a list. To edit an existing branch, click on the pencil next to the name of the branch.

HACKNEY BOROUGH > BRANCHES

+ Add new Download

Showing 1-20 of 22
20 per page

Name	Code	Active members (excluding at risk)	At risk members	Supporters	Everyone
Lea Bridge	LBR				
London Fields	LFD				
Shacklewell	SKW				
Springfield	SFD				
Stamford Hill West	SHW				
Stoke Newington	SNT				
Test Branch 2	TB2	0	0	0	0

Note that you can also edit branches by clicking on the name of the branch in the list, and then clicking “Edit” at the top left of the screen.

Step 3

Type the updated branch name or code into the Name and Code fields, then click “Update” at the bottom of the page. Alternatively, to delete a branch, click “Delete” at the top of the page.

HACKNEY BOROUGH > BRANCHES > TEST BRANCH 2 > EDIT

Back to list Delete

Name *
Test Branch 2

Code *
701. TB2

Every branch must be assigned a short code (up to 6 characters) which is unique within the local party. Your organisation prefix (“701.”) will automatically be added and you should not include it.

Cancel Update

You will be directed to the Branches page, where your updated branch will be shown in the list.



How to add contacts to a branch

What you will learn in this guide

- [How to add individual contacts to a branch](#)
- [How to add batches of contacts to a branch](#)

Permissions needed

	View	Edit	Create
Contacts	✓	✓	

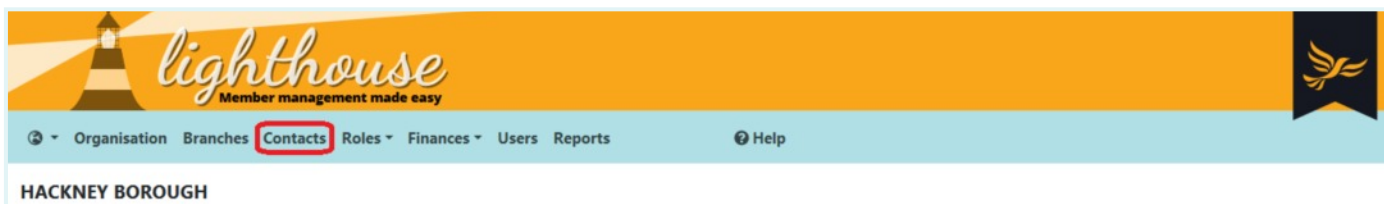
	View	Edit	Create
Contacts	✓	✓	



How to add individual contacts to a branch

Step 1

After logging into [Lighthouse](#), you will be directed to the Dashboard page. Click on "Contacts" in the menu bar at the top.

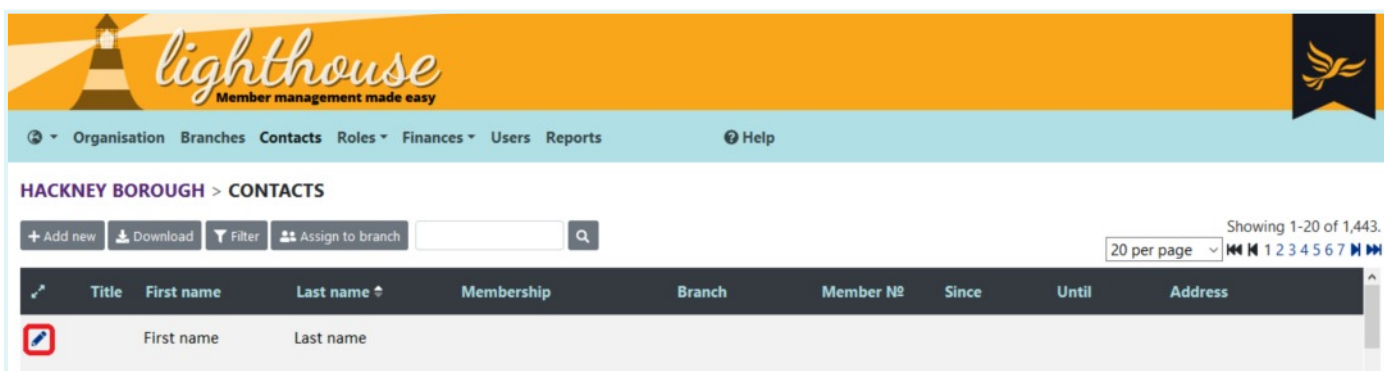


Step 2

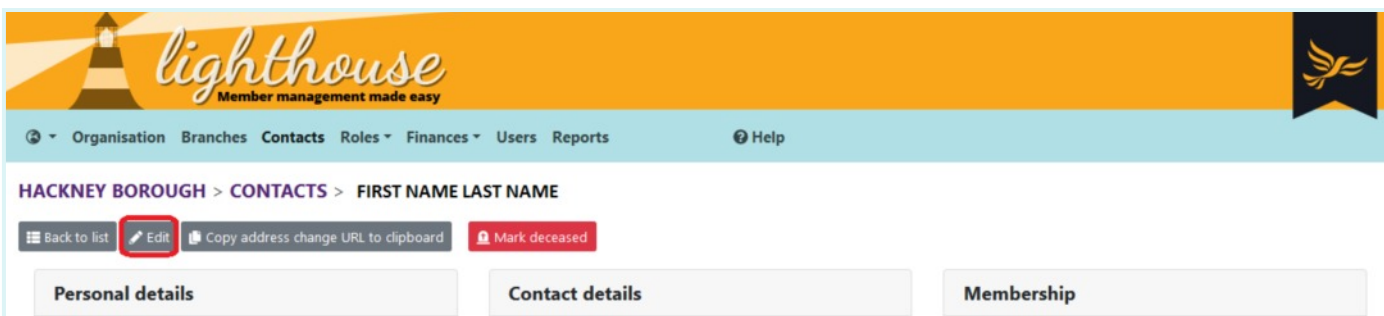
You will be directed to the Contacts page. From here, you can view a list of all contacts - that is, members, supporters, and donors - for your local party.

If you need support to create a new branch, [click here](#) to learn how to create new branches in Lighthouse.

To add a contact to a branch, either click the edit button in the main contact view...



... or click on the contact's name, and then click "Edit" at the top left of the screen.





Step 3

You will be directed to the “Edit contact” page. The option to add the contact to a branch can be found right underneath the “First name” and “Last name” fields.

Start typing in the name of the branch you want to add the contact to, and Lighthouse will suggest a list of branches to choose from. Click on the one you want to choose.

Title	First name	Last name *
<input type="text"/>	<input type="text"/>	<input type="text"/>
Branch		
<input type="text"/>		
<small>Start typing the name of an existing branch and select from a list.</small>		

Step 4

Once you have chosen the branch, click the “Update” button to save your changes.

<input type="checkbox"/> Refused to renew membership
<input type="checkbox"/> OK to email
<input type="checkbox"/> OK to phone
<input type="checkbox"/> OK to send post
<input type="checkbox"/> OK to fundraise
<small>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.</small>
<input type="button" value="Cancel"/> <input type="button" value="Update"/>



How to add batches of contacts to a branch

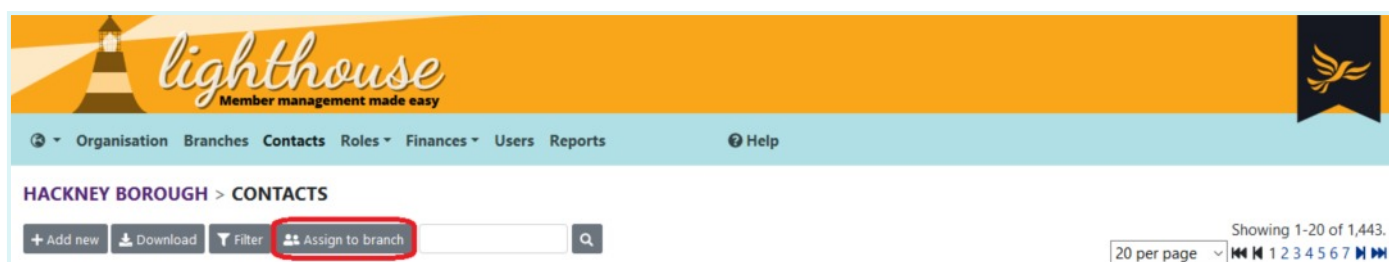
Step 1

After logging into [Lighthouse](#), you will be directed to the Dashboard page. Click on "Contacts" in the menu bar at the top.

Step 2

You will be directed to the Contacts page. Before you start, make sure that the list of contacts shown here (including those on subsequent pages) matches the list of people you want to add to a branch.

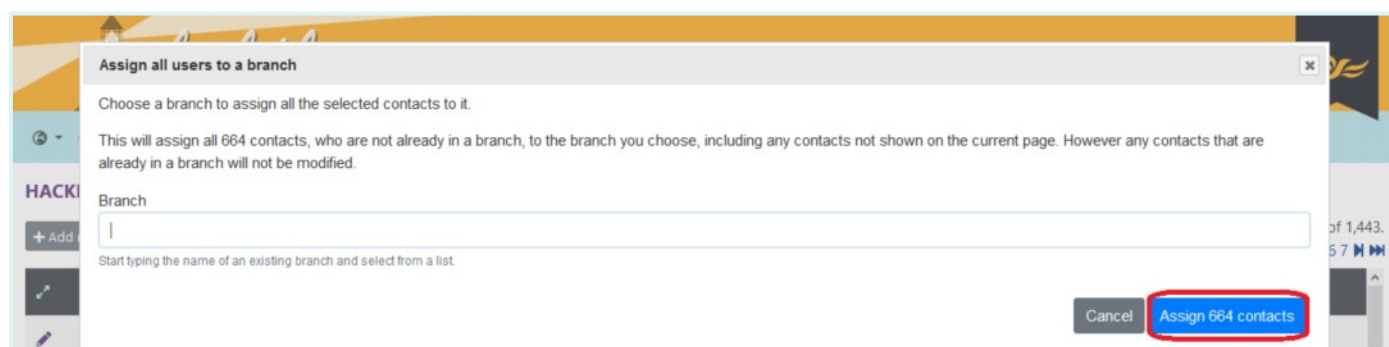
The Contact page lists all contacts by default, so you may wish to use the "Filter" button to narrow down your list - [click here](#) for more information on how to do this. Once your list is ready, click "Assign to branch" to get started.



Step 3

A pop-up box will appear, telling you the number of contacts in your list who are not already assigned to a branch. Start typing in the name of the branch you want to assign these people to in the box, and click to choose from the list that appears underneath it.

Finally, click "Assign [number] contacts" to assign your selected contacts to the branch.



Please note that it is currently not possible to un-assign or reassign contacts to different branches in bulk. Should you need to do this, please [contact support](#).