

2.2: The Contact Details Tab

The Profile

Welcome to An Introduction to Profiles, video 2 of 4: The Contact Details Tab.

The profile is where to find all information about a person or organisation. This includes the details you've recorded about them, and records of what you do with them, including activities or services that you have provided.

As you can see, we're now looking at someone's profile.

You can, as always, see the Main Menu at the top of the page. Below this is the name of the profile, and a row of profile tabs.

The tab we'll look at first is the Contact Details tab, which is the one you'll see first in many systems. If it isn't in yours, click where it says 'Contact Details' to view it.

Contact Details

The Contact details tab is a standard tab, found in all systems. In yours, it could have been renamed, or may contain additional fields. A field is a box where you can enter information. To the right of the page, you'll see the 'Edit address' button. Clicking it will allow you to edit the address section of this tab. Let's do that now.

Here you can enter the address details of your client.

Postcode is first. Most systems perform postcode look-up, so if you enter a postcode you'll see street names appear. This is based on Ordnance Survey data, and is accurate in most locations, though you may occasionally need to make manual corrections. If you don't find it useful in your area, we can turn it off for you.

All the other fields here are text fields. The system will check the formatting in some, such as mobile number and email address—this is to help ensure your data entry is accurate. When you've finished, click the 'Save' button in the bottom-right-hand corner of the page.

If you're following along in your own system, why not pause the video, and take a moment to complete this tab in full? Remember to save it once you've finished.

Once you save, you'll see the information you entered.

There are a couple of useful extras in this view, in the form of links. The 'view map' button next to the postcode will open a new tab, showing that postcode in Google Maps. The 'send' button will open a new email to them in your default email programme if this has been set up on your computer. The 'visit' button will take you to their website.

Contact Permissions

When you have completed and saved the address details, you will need to click on the 'Contact details' tab again to reload it. Now when you scroll down, you'll see two other sections.

The 'Contact Permissions' section shows whether or not you have permission to contact the person or organisation. If 'Allow email' is set to 'No', then Lamplight will not send email to them, even if you have added them to a mailing list. You can edit this section using the 'edit' button on the right, and saving in the same way.

Profile Roles

The final section is 'Profile Roles'. These are the different roles a person can have in Lamplight, and they reflect the types we saw when we created the profile.

If you click 'Edit roles' over on the right, you'll see that a single profile can have more than one role. For example, a person can be a user, and a volunteer. A volunteer may also be a funder.

Once you have finished editing, click 'Save', which as always you can find over on the right.

I suggest pausing the video again and trying these out in your system. The next video will introduce custom tabs and fields in profiles. Thanks for watching!