Hello, it's Max from Lamplight. Welcome to part 2 of Basic Training: An Introduction to Profiles.

In this video I'll show you how to create a profile.

You can download a transcript of this video if it's helpful to read along. Pause the video at any time, to try things in your system or our test system. I encourage you to do this regularly. Practicing and building muscle memory are the best ways of learning.

A quick note before we start: some of the terms in your system may be different to those in this video. If you follow my actions on screen, you'll see where I'm clicking, and you should be able to locate the same function in your system even if it has a different name.

Introduction to People and Organisations

Lamplight is all about the people and organisations with whom you work.

Your profile types may have different names, but many organisations will have service users (or clients), staff members, contacts, funders, and volunteers. There may also be organisations, families or other types. Each type of profile contains different information.

Creating a New Profile

To create a new profile, click 'People' in the Main Menu, and then 'Add Person'. Your may have a drop-down list, showing the different profile types. If so, take a moment to look at the different types available, then choose the type you want to create. If clicking 'add person' takes you straight to the next screen, don't worry, you'll choose the profile type in a moment.

- enter a title (optional)
- enter their first name and surname
- You may have suffixes in your system. If so, choose one from the drop-down list if you need to.
- You can also enter an alternative name, or nickname, and these can be used as search criteria.

If you store anonymous profiles in your system, you can leave the details blank, and Lamplight will assign a profile ID number instead.

If, when you clicked on 'add person', you went straight to a page like this, you'll have a list of profile types at the bottom, from which to choose the right one.

Some systems will have additional fields. These have been determined to be essential for that type of profile and must be populated before you can create it.

If you have multiple projects in your system, you may need to choose a project-sharing policy. Ask your Project Administrator about this if you're uncertain. If you need to continue at this point, click 'no sharing', which can be updated later. If you don't see any of these, just carry on.

Once you've finished, you'll find the save button where it normally lives, in the bottom-right-hand corner of the page. Click it, and it will take you to the profile you've just created.

I suggest you take a short while to repeat what you've learnt, in your own system, referring to this video if you need to.

Keen to learn more about profiles, and how to use them? Continue to the next video to learn about entering profile information. Thanks for watching.