



Beacon

... so you want to know more?

Consider these questions

Where is all your U3A's information kept?

Is it readily and widely available to use?

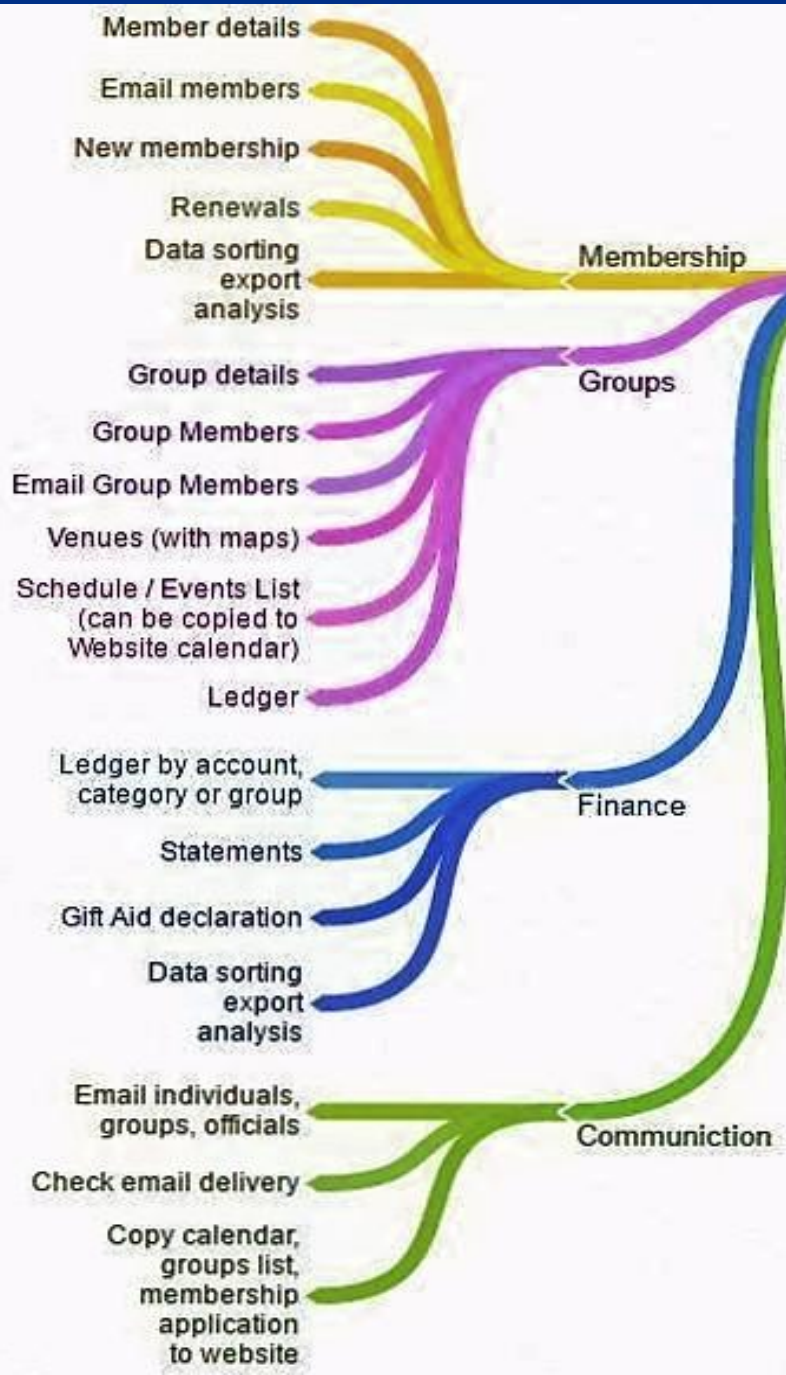
Are your roles easy to hand over?

Does everything comply with GDPR?

What if ...

- there was one simple way to pull all your data together
- that was easy to learn
- that required no IT skills to operate it
- that was easy to pass on
- that helped you comply with GDPR?





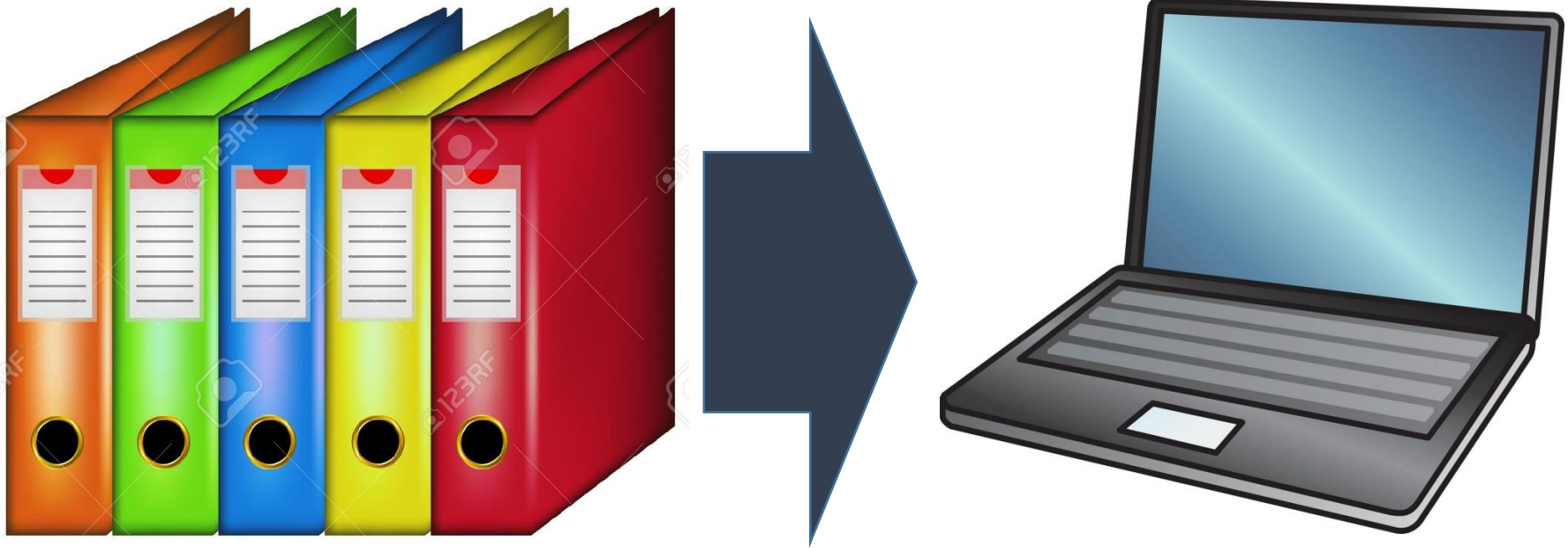
Beacon

- can do *all of this* for you.

It provides a single, safe and secure place that is easily accessible to store *everything*.

So what is Beacon?

- A website membership management system



- For which you will need a computer and internet access

What else would you need?

- One person to administer the site
- With committee agreement they would manage the individual access of all users
- They could help others learn how to use Beacon.



The benefits of Beacon

- No IT or technical skills needed more than general use of a laptop or tablet
- Always available to authorised users
- Security for your records
- Simple operation
- Reduced workload
- Easy continuity



It is an online website at www.u3abeacon.org.uk
so always available from anywhere.



Administration

U3A

Username

Password

Passwords are case sensitive

This is a private computer - tick to store local settings

If this is a public or shared computer, do NOT tick the checkbox and ensure that you log out when finished

Forgotten your username or password? [Click here.](#)

Admin has to be able to see everything



Reigate & Redhill

Administration

You are logged in as John Hopkins [Log Out](#)

Membership

- [Members](#)
- [Add new member](#)
- [Membership renewals](#)
- [Recent members](#)
- [Non-renewals](#)
- [Membership cards](#)
- [Addresses export](#)
- [Statistics](#)

Groups

- [Groups](#)
- [Venues](#)
- [Faculties](#)
- [Calendar](#)

Finance

- [Ledger \(by account\)](#)
- [Ledger \(by category\)](#)
- [Ledger \(by group\)](#)
- [Add transaction](#)
- [Transfer money](#)
- [Credit batches](#)
- [Reconcile account](#)
- [Financial statement](#)
- [Groups statement](#)
- [Gift Aid declaration](#)

Misc

- [Audit log](#)
- [U3A officers](#)
- [Public links](#)
- [Data export & backup](#)
- [E-mail delivery](#)
- [E-mail unblocker](#)
- [Personal preferences](#)

Set up

- [System users](#)
- [Roles and privileges](#)
- [System settings](#)
- [System messages](#)
- [Finance accounts](#)
- [Finance categories](#)
- [Membership classes](#)
- [Member statuses](#)
- [Poll](#)

What the membership secretary can see



Demoton

Administration

You are logged in as John Hopkins [Log Out](#)

Membership	Groups	Finance	Misc	Set up
Members Add new member Membership renewals Recent members Non-renewals Membership cards Addresses export Statistics			Personal preferences	Membership classes Member statuses Poll
<p>Beacon allows you to restrict access only to the parts users need. This helps you comply with GDPR.</p>				
U3A Beacon Users' Forum		Beacon User's Guide		
Public website links	Join Demoton U3A now!	Members Portal	Public groups list	Public calendar
Documents	Demo Test Notes	Beacon use application form		

The membership list - this is the core of Beacon.
 It can be searched easily by e.g. name, part name, postcode or from the alphabet list.
 Clicking on a name opens up that member's full record card.
 This contains all contact details, groups they belong to and a subscriptions record.

[Home](#) - [Add New Member](#)

Members

Quick Find Search include criteria below

Status: Current Deceased Lapsed Resigned

Poll Negate poll Class Payment type

Use Quick Find or select filters above to customise list of members.
 Perform operations on list at bottom of page.

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Select	No	Name	Address	Telephone	Class	Status
		A				
<input type="checkbox"/>	1001	Fred Aardatt	29 High Street, Demoton, DM12 7RA	07070 786545	Individual	Current
<input type="checkbox"/>	1002	Brian Aardbatt	29 High Street, Demoton, DM12 7RA		Individual	Current
<input type="checkbox"/>	1003	Fred Aardcatt	12 High Street, Demoton, DM12 7RA	07070 987987	Individual	Current
<input type="checkbox"/>	1293	Brian Aardvark	23 Askwith Street, Carrington, Demotown, DE1 5RG	01659 321789	Joint	Current
<input type="checkbox"/>	1004	Alan Abbey	72 Toning Ave, Demoton, DM5 4TS	01 001 656 564	Individual	Current
<input type="checkbox"/>	1005	Patricia Abrahams	15 Some Street, Demoton, DM2 3XX		Individual	Current

What the groups coordinator can see



ETeam

[Home](#) - [Add New #Group](#)

#Groups

Faculty

Show active only



Operations at bottom of page

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

The GC can see all the groups: where and when they meet, the contact, the numbers in each and whether there are any spaces. A waiting list can be created for each group.

Select	#Group	Active	When	Where	#Leaders	Members	Max	Waiting
▲ ▼	A							
<input type="checkbox"/>	Art Appreciation	Y	3rd Thursday at 1:00pm	The Feelgood Centre	Fred Aardatt	1		
▲ ▼	B							
<input type="checkbox"/>	Bible Study	Y	3rd Sunday at 2:30pm	Friends Meeting House	Albert Atheist	1		
<input type="checkbox"/>	Bird Watching	Y	4th Tuesday at 9:00am	No Fixed Venue	Hilary Barker	1		
<input type="checkbox"/>	Book Club	Y	Fortnightly on Fridays at 11:00am	Library	John Black	1		
<input type="checkbox"/>	Bowls	Y	3rd Monday at 10:00am	Bowls Club	Jan Bradbury	1		
<input type="checkbox"/>	Bridge	Y	Fortnightly on Wednesdays at 2:00pm	Private House	Tricia Abrahams	1	12	
▲ ▼	C							
<input type="checkbox"/>	Coffee and Cake	Y	1st Thursday at 10:30am	Costa High St	Anne Bruce	1		
<input type="checkbox"/>	Computing - Tablets	Y	3rd Monday at 2:00pm	Library	David Barrett	1		

What a group leader might see



Demoton

Administration

You are logged in as John Hopkins [Log Out](#)

Membership

Groups

Finance

Misc

Set up

[Groups](#)

[Personal preferences](#)

[Venues](#)

[Faculties](#)

[Calendar](#)

[U3A Beacon Users' Forum](#)

[Beacon User's Guide](#)

Public website links

[Join Demoton U3A now!](#)

[Members Portal](#)

[Public groups list](#)

[Public calendar](#)

Documents

[Demo Test Notes](#)

[Beacon use application form](#)

Hover mouse over captions for more information

Every group has its own details page

[Home](#) - [Groups List](#) - [Faculties](#) - [Venues](#) - [Add New Group](#)

Group Record for Bee Keeping

Details

[Schedule](#)

[Members](#)

[Ledger](#)

Group Details

Group	<input type="text" value="Bee Keeping"/>		
Faculty	<input type="text" value="Walking & Outdoors"/> ▾	Status <input type="text" value="Active"/> ▾	Max members <input type="text" value="12"/> gkey: 6372
	<input checked="" type="checkbox"/> Allow members to join on-line	<input type="checkbox"/> Enable waiting list	<input checked="" type="checkbox"/> Notify leader of changes
When	<input type="text" value="1st Monday at 2:00pm"/>		
Normal start time	<input type="text" value="14:00"/>	End time <input type="text" value="16:00"/>	Contact <input type="text" value="Brian on 0123 555 2589"/>
Venue	<input type="text" value="College"/> ▾		
Information	<input type="text" value="Starter kit can be borrowed"/>		
Notes	<input type="text"/>		
Group record created 28 Feb 2019 16:52; last changed 28 Feb 2019 16:52			
<input type="button" value="Save Record"/>		<input type="button" value="Delete"/>	

What the treasurer might see

Administration

You are logged in as John Hopkins [Log Out](#)

Membership

Groups

Finance

Misc

Set up

Accounts and categories can be created locally by your U3A.

- Ledger (by account)
- Ledger (by category)
- Ledger (by group)
- Add transaction
- Transfer money
- Credit batches
- Reconcile account
- Financial statement
- Groups statement
- Gift Aid declaration

[Personal preferences](#)

- [Finance accounts](#)
- [Finance categories](#)

[U3A Beacon Users' Forum](#)

[Beacon User's Guide](#)

Public website links

[Join Demoton U3A now!](#)

[Members Portal](#)

[Public groups list](#)

[Public calendar](#)

Documents

[Demo Test Notes](#)

[Beacon use application form](#)

Current account

Whether you choose to use the finance module fully or not, Beacon will automatically record all subscriptions as they are paid.

308	7 Mar 2019	Albert Anderson	1009	Membership	1001234	£ 12.00		£ 362.00	14 Mar 2019
309	7 Mar 2019	Sammy Anderson	1011	Membership	0091567	£ 11.00		£ 373.00	14 Mar 2019
310	8 Mar 2019	Janet Baker	1278	New membership		£ 12.00		£ 385.00	14 Mar 2019
311	8 Mar 2019	Lesley Mosley	1279	New membership		£ 12.00		£ 397.00	14 Mar 2019
312	8 Mar 2019	Susan Bunting	1280	New membership		£ 12.00		£ 409.00	14 Mar 2019
313	8 Mar 2019	Maria Zorro	1281	New membership	1004682	£ 18.00		£ 427.00	14 Mar 2019
314	8 Mar 2019	William Allen	1007	Membership		£ 24.00		£ 451.00	14 Mar 2019
315	11 Mar 2019	Susan Foster	1283	New membership	000123456	£ 12.00		£ 463.00	14 Mar 2019
320	12 Mar 2019	Bertie Beast	1284	New membership		£ 12.00		£ 475.00	14 Mar 2019
321	14 Mar 2019	Mark Adams	1285	New membership		£ 11.00		£ 486.00	14 Mar 2019
322	14 Mar 2019	Ann May	1286	New membership		£ 11.00		£ 497.00	14 Mar 2019
323	14 Mar 2019	Access Allareas	1006	Membership		£ 12.00		£ 509.00	14 Mar 2019
324	14 Mar 2019	Wil Alsop	1008	Membership		£ 12.00		£ 521.00	14 Mar 2019
325	14 Mar 2019	Johny Anderson	1010	Membership		£ 11.00		£ 532.00	14 Mar 2019
326	14 Mar 2019	Alfie Animal	1012	Membership		£ 12.00		£ 544.00	14 Mar 2019
327	14 Mar 2019	Fred Ashkenazy	1015	Membership		£ 12.00		£ 556.00	14 Mar 2019
328	14 Mar 2019	Sandi Williams	1263	Membership		£ 12.00		£ 568.00	14 Mar 2019
329	14 Mar 2019	Beebee Ashe	1014	Membership		£ 12.00		£ 580.00	14 Mar 2019
330	14 Mar 2019	Bowling group		Raffle		£ 36.00		£ 616.00	14 Mar 2019
341	15 Mar 2019	John Smith		Raffle prizes			£ 90.00	£ 526.00	26 Mar 2019
356	22 Mar 2019	[tfr to Social]		test transfer			£ 50.00	£ 476.00	
357	22 Mar 2019	Genghis Khan	1287	New membership		£ 12.00		£ 488.00	
359	25 Mar 2019	[tfr to Deposit]		TEST transfer			£ 15.00	£ 473.00	
Transaction	Date	Payee	Mem No	Detail	Cheque	In	Out	Balance	Cleared

Transactions

Transaction

All transactions have their own individual record.

Money received Payment
 Transaction No: 464 (tkey: 93024)

From: Amount £

Date:

Payment Method: Cheque No:

Detail:

Account: Cleared:

Remarks:

Associate transaction with

Members	<input type="text" value="Aardatt, Fred"/>	Gift aid eligible	<input type="text" value="£ 10"/>	Gift aid claimed	<input type="text"/>
	<input type="text" value="- none -"/>		<input type="text" value="£"/>		<input type="text"/>
Group	<input type="text" value="- none -"/>				

Categories

Bee Keeping	<input type="text"/>
Central Costs	<input type="text"/>
Central Income	<input type="text"/>
Committee Expenses	<input type="text"/>
Donations	<input type="text"/>
Group meeting subs	<input type="text"/>
Groups Income	<input type="text"/>
Individual Membership	<input type="text"/>
Membership	<input type="text" value="10.00"/>
PayPal commission	<input type="text"/>
Room Hire	<input type="text"/>
Social Expenditure	<input type="text"/>
Social Income	<input type="text"/>
The Centre	<input type="text"/>
Thir Age Trust	<input type="text"/>
Tools and equipment	<input type="text"/>
Total	£ 10.00

Finance

- It is a basic in and out record.
- Most U3As start from scratch in Beacon
- Financial and membership years are set to match your existing U3A years
- Create your own accounts
- Do Gift Aid declaration
- Create end of year statements
- It is easy to audit



E-mails

All addresses are seen here but they are sent singly so no-one sees anyone else's address.

Standard messages can be saved.
Mail can be used with mail merge.
Attachments can be added.

[Home](#)

Send E-mail

From:

To:

 7 addressee/s

Tick to receive copy

Super User: Show Master Messages

Load standard message:

Attachments:

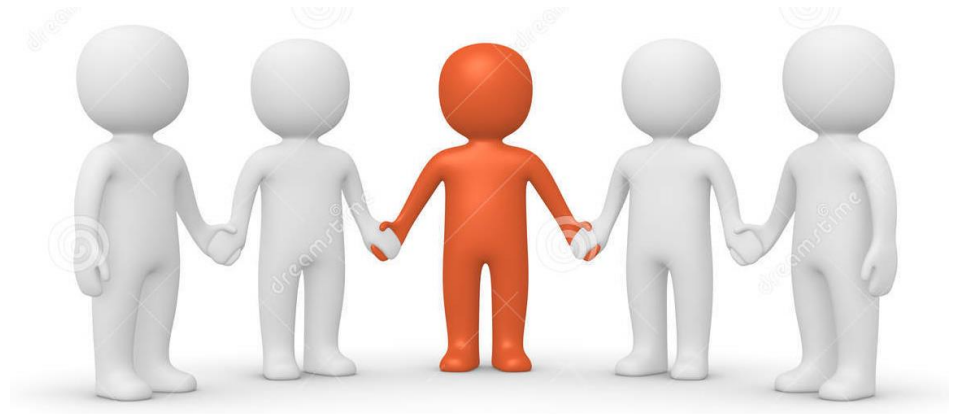
Subject:

You may personalise this message with the following tokens:

- #TITLE - member's details
- #FORENAME
- #SURNAME
- #FAM - familiar name
- #MEMNO - membership number
- #EMAIL
- #TELEPHONE
- #MOBILE
- #EMERGENCY - emergency contact
- #AFFILIATION
- #RENEW - renewal date
- #FEE - renewal fee
- #MEMCLASS - membership class
- #GIFTAID - gift aid date
- #ADDRESSH - address in 1 line
- #ADDRESSV - address over several lines
- #POSTCODE
- Partner's details...
- #PTITLE

A Useful Extra - Polls

- YES/NO questions to pick out special groups
- E.g.
- No TAM
- Committee members
- Group Leaders
- RUGS (Really Useful ...) Groups
- Wants email newsletter
- You create them
- You can have as many as you want



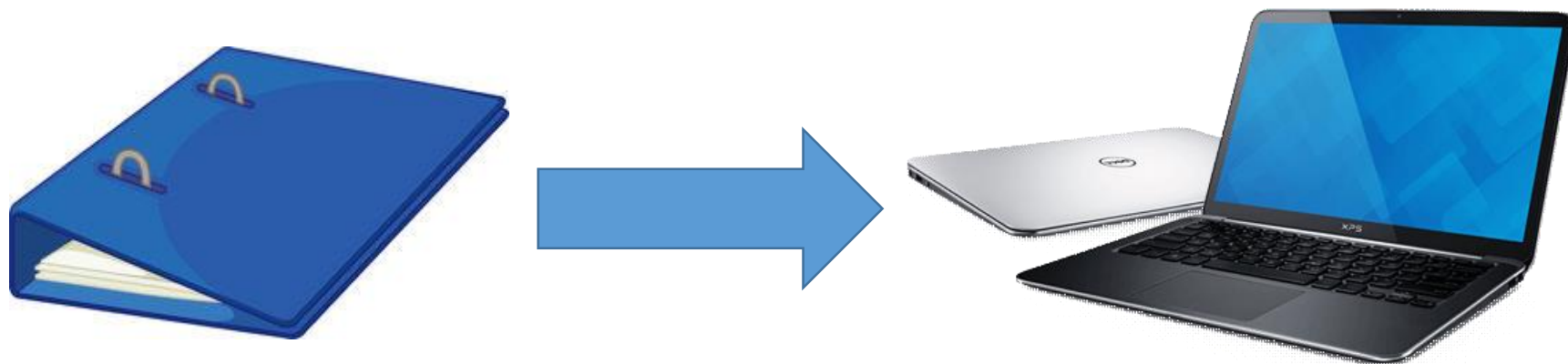
Support Teams

- Journey Team – initial explanation and encouragement through to set-up and implementation
- Migration Team – working with you to move your data into Beacon.
- Ongoing Help Team – for continued help after going live.



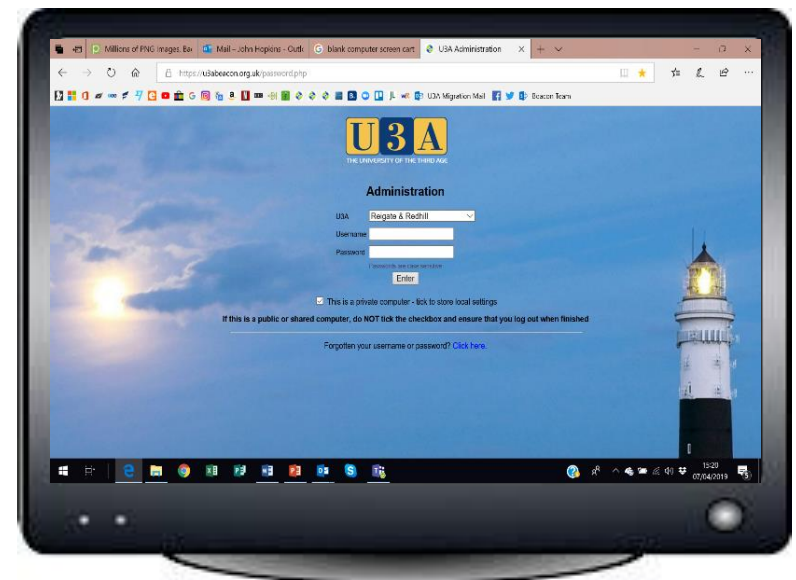
What do we do for you?

- Give you a demonstration
- Provide a supporter
- Provide your own U3A version of Demoton (a site with fictional data) for you to investigate
- Software check that your data is ready for migration



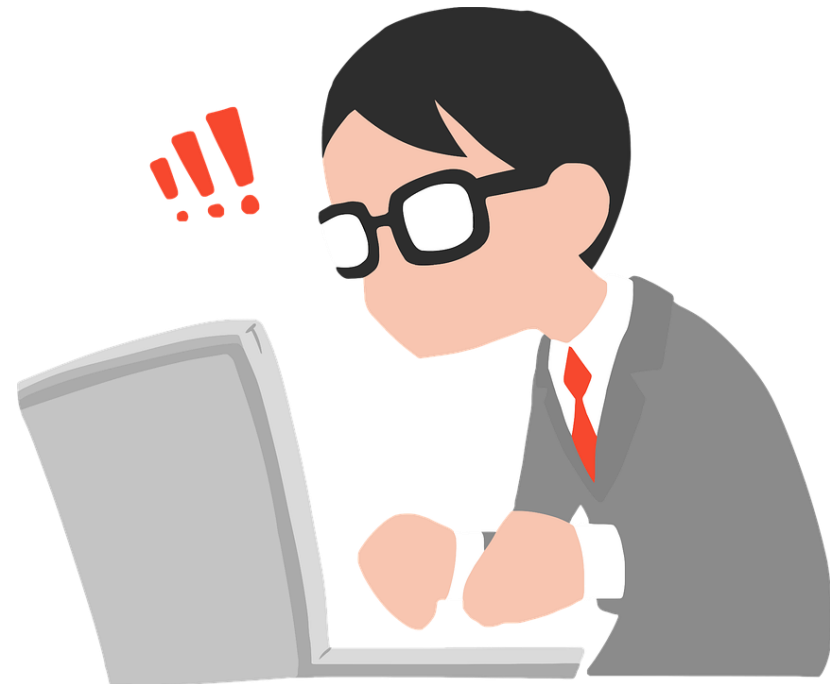
What else do we do for you?

- Our migration team can guide you through the data preparation and, if necessary, convert it for you.
- We create your own U3A Beacon website.



And afterwards?

- Detailed paperwork to help you set up
- Your supporter will continue to be available
- Access to the Beacon Forum via the website
- Access to the migrator for any technical issues
- Ongoing Help Team



What does it cost?

- Beacon costs £1 per member per year
- This is calculated by the Trust on March 31st
- The plan is that as more U3As use Beacon the price should come down.



Is your data safe?

- Security is our first responsibility
- Your data is backed up professionally every day to two physically separate sites.
- Every U3A's data is encrypted



Using Beacon

- If you would like more information on Beacon please contact us at
- info@beacon.u3a.org.uk

Thank you for the interest
you have shown.

Good Luck!

