

U3A Beacon Management System

User Guide

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Significant changes in this revision of the document are highlighted in yellow.

Note: minor changes to text or formatting and items that have been moved are not highlighted.

Some tips when using Beacon

A1 Links and buttons

- Words in blue are links which when clicked usually take you to a different page. This will usually replace the current page. However, if you hold down the **Ctrl** key when clicking a link or when pressing a button, the new page will appear in a new tab. **This is a very useful facility and can be used to look up or edit other information without closing the current page.**

For example: you may wish to examine a Member Record without closing the list of members. When you return to the first page (simply by clicking its tab) it will not have reloaded and therefore its position will not have changed making it easier to go to another member.

Note: In some pages data in the first page will be automatically updated to reflect edits made in the second page. However, in other pages this has not yet been implemented and changes will not be shown until the page is refreshed.

- If you are unsure what a link or button does, hover the mouse over it and a tooltip will often give you an explanation. After a while tooltips close themselves. You can speed this up by clicking on an empty part of the page.

A2 Page layout

- Links appear at the top of most pages and at the bottom of longer pages. Clicking one of these links takes you to a different page (or sometimes an empty record of the same type as the present page).
- Filters to change the data you see are usually near the top of a page, under the links.
- Operations on the current page are carried out through buttons near the end of the page, sometimes integrated into the end of a list.

A3 Table lists

- Many lists have the letters of the alphabet in a row above the list. Clicking on one of these letters will scroll the list to the first item in the main column (such as a member's surname or group name) starting with that letter.
- Large arrows in circles on the right side of some pages will also scroll to the bottom and top of the page.
- Many lists have some of the titles in the header row shown in blue. By clicking on these links, the list will be reordered, sorted by the selected column. However, a link in a **Select** column has a different function. Clicking on the link will either bring up a menu by which to select items (for example, members with or without email) or it will toggle the state of all the checkboxes in the column. The column tooltip will clarify the function.
- To select names in a table prior to choosing one of the options in a drop-down list below the table, you may either tick the boxes in the **Select** column individually or you may click the **Select** column header or footer to display the selection menu.

A4 Drop-down lists

- If a drop-down list is long, you can jump quickly to the first entry starting with any particular letter(s) by focusing the list (just click on it) and then pressing the letter(s) on the keyboard.
- Successive presses of the same letter will step through the list one entry at a time. This can sometimes be quicker than scrolling through the list.

A5 Calendar controls

- Calendar controls are provided to change date fields. Click in the field to display the calendar control.
- You select a date by clicking on the day number.
- You can change the month or year by selecting from the drop-down lists at the top of the control or by stepping through months using the small arrows on either side at the control top. After changing the month or year, you must click on the required day number in order to close the control and accept the selected date.
- If shown, you may use the **Today** button to move to the current month. You must still, however, click on the current day number which will be highlighted.

1 Introduction

U3A Beacon is an online facility for managing local U3As, particularly with regard to membership, finance and groups. It is located at <https://u3abeacon.org.uk> and is accessed by username and password, allocated by each U3A Site Administrator.

All U3As are co-hosted on the same server, with comprehensive security arrangements to ensure that the data of each U3A is effectively isolated from that of all others. Moreover, the encryption key used to encrypt sensitive data fields is different for every U3A.

The system is accessed by an internet browser and can therefore be used on most computers, tablets and smartphones. Recommended browsers are Firefox and Chrome but other browsers are also generally compatible.

There are 3 levels of access to Beacon which can be configured by the U3A's Site Administrator

- **Public Access**

Anyone can view webpages that show the public versions of the **Groups List** and **Calendar**. These just show basic information about **Groups** and **Meetings**. **Public Access** includes the ability to join online, if enabled.

- **Member Access**

Current U3A members may login via the **Members Portal** (see [10.2](#)) to view and edit their **Member Records**, view more comprehensive versions of the **Groups List** and **Calendar**, add themselves to **Groups** and renew their membership online (if enabled).

- **System User Access**

Group Leaders, Committee Members and other role holders may be given a log-in as a **System User** which enables them to access data held within some areas of the system, depending on the privileges that they have been assigned.

2 Logging in as a System User

Upon launching the system, a log-in screen is displayed. Select the U3A you require, enter your username and password and press **Enter**.

- You are allowed three attempts to log-in. If the third try fails, another log-in attempt will not be accepted for 15 minutes. You may avoid this delay by closing and reopening your browser. If you continue to be unable to log-in, seek the assistance of your **Site Administrator** who will confirm your username and may reset your password.
- Usernames and passwords are case-sensitive. Make sure that you are not inadvertently in Caps Lock mode.
- Passwords should be typed, not pasted. Correct verification will not take place for pasted passwords.
- If you have not used the system before, or if your password has been reset by a **Site Administrator**, you will have to change your password at first use. See [9.7](#).
- If you are using a private computer, you are recommended to tick the checkbox below the Enter button in order to make the system easier to use by storing local settings. However, if you are using a public or shared computer, you must not tick this checkbox to avoid a possible security breach. In this case, always make sure that you log out when you have finished using the system.
- If you have forgotten your username or password, use the **Click here** link. See [9.6](#).
- If you are logging in as a Site Administrator, you will be asked to supply an email address if you have not previously done so. Without this you will not be able to send emails.

3 Home Page

After normal log-in, you will find yourself in the home page from where all of Beacon's functionality may be accessed. Look out, too, for any site or system messages that may be displayed at the bottom of the page.

From any other page you can click on the **Home** link at the top of the page (and sometimes also at the bottom) to return to the home page.

The operations are grouped under **Membership, Groups, Finance, Misc** and **Set up**. However, you will only see those operations for which you have been assigned access rights. This may mean that for some users, some headings have no operations beneath them.

It is the case throughout Beacon that operations, links and buttons will be hidden if you do not have sufficient access rights to use them. If you feel that you do not have sufficient access rights to do what you need to do, contact your U3A Site Administrator.

4 Membership

Beacon supports the following membership classes:

- **Individual:** Full single membership
- **Joint:** 1 of 2 members living at the same address, satisfying the requirements for HMRC Family membership
- **Associate:** A reduced rate single subscription for members that pay a full subscription to another U3A
- **Joint Associate:** A reduced rate joint subscription for members that pay a full subscription to another U3A

Note: Two members that share an address may only qualify for joint memberships if they meet the HMRC requirements of Family membership (see [7.8](#))

Other types of membership class can be created (see [8.7](#)).

4.1 Members List

Select **Members** on the home page to display a list of members.

The filters at the top allow you to restrict the list by membership status (**Show**: one or more), **Poll**, membership **Class** or last **Payment type**. **Negate poll** can be used to show all members except those assigned to a particular poll. As you change the filters, the page will reload.

The **Quick Find** box at the top may be used to search quickly for full or partial matches in a member's name, 'known as', street, town, postcode, telephone or membership number. Enter the text or number you want to match and press **Search**. When you have finished searching, press **Cancel Search** to return to normal operation.

After selecting one or more members, the following operations are available by choosing from the drop-down list below the table and pressing **Do with selected**:-

- **Send email:** opens a form on which to compose an email (see [6.1](#)).
- **Send letter:** opens a form on which to compose a letter (see [6.2](#)).
- **Download Excel:** to generate an Excel file containing members' addresses, email addresses and phone numbers.
- **Download pdf:** to generate a pdf document containing members' addresses.
- **Download e-mail addresses:** to generate an Excel file containing email addresses.

- **Add to group:** presents a list of groups that members can be added to.
- **Add to poll:** presents a list of polls that members can be added to.

4.2 Member Record

Member Records can be accessed by clicking on a member's **Name** or membership **No** highlighted in blue in the **Members List** and elsewhere throughout Beacon.

The fields in the upper part of the record, including **Mobile**, relate to that member alone. The address fields at the bottom, including (landline) **Telephone**, may be shared with another member that lives at the same address.

The **Joined** and **Next renewal** dates are set automatically by the system and will not normally need to be touched. They may, however, be overridden manually.

An email may be sent to the member by pressing the Send button adjacent to their email address (see [6.1](#)).

Optionally, a **photo** may be uploaded for the member. Press the adjacent button (the style of which varies between browsers) and select an image file of type jpg, png, gif or bmp. Maximum size 2MB.

Photos should ideally be slightly taller than they are wide. If they are too tall the photo obscures some of the text on the Membership Card – photos about 1000 pixels wide by 1100 tall (or a similar ratio) seem to work well.

At the bottom of the Member Record page there are lists showing the groups to which the member belongs and the financial transactions that they are associated with. By clicking on the corresponding links, you may go directly to the group or transaction records.

After making any changes to a Member Record, press **Save** to commit them.

4.2.1 Record deletion

Although a **Delete** button is provided to remove a Member Record, this should only be used if a Member Record has been created inadvertently (perhaps there is already a record for the member). When you delete a Member Record, the membership number is not re-used.

In normal operation, Member Records should not be deleted but the status should be changed to **Lapsed** (see [4.6.1](#)) or some other non-current value such as **Resigned** or **Deceased** (see [8.8](#) for details of how to create a new status).

Member Records must be retained for up to 7 years to comply with HMRC regulations for their associated financial transactions. At the end of this period, expired records are removed through the **Non-renewals** option (see [4.6.2](#)).

Note: If duplicate Member Records are inadvertently created, it is recommended that the Membership Secretary reviews the duplication and amends / re-links as necessary to ensure that financial transactions and group memberships remain linked to the member being retained, before deleting the unwanted Membership Record.

4.3 Add New Member

If you have PayPal services enabled, members may join themselves online, which requires no manual intervention.

Before adding a new member manually, check that they are not already in the system as a current or former member*. This can be done by going to the Members list and ticking all the boxes in the Status row. This will display a full list of all current and past members in surname order.

Also check if there are any other U3A members living at the same address as the new member. This can be done by clicking on the blue Address heading at the top of the Members list. This will sort the table in address order making it easy to check if the new member's address is already on the system.

Alternatively you can search for a specific string using your browser search box (Ctrl+F).

** In theory these steps shouldn't be necessary, but experience has shown that applicants don't always fill in the Membership Application form in the expected way!*

(It is planned to introduce a system enhancement to automatically check for duplicate Member Records at some point in the future).

4.3.1 To add a new member

Click **Add new member** on the Home Page, Members List or an existing Member Record.

Work down the page from top to bottom. When you select the required type of membership, options further down the page may change. All fields with a caption in bold are mandatory.

- If left blank, the **Initials** field will be completed automatically from the members **Forename(s)**. However, the system will not override **Initials** set by the user.
- If the member **shares an address** with someone who is already a member, select that person from the drop-down list and the address details will be filled in automatically.
- If someone else with a shared address is joining at the same time click **share address with new partner** to open additional fields for adding the other person's details.
- At the bottom is shown the membership fee due. Enter the **Amount received**. Select the **Payment method** (and, optionally, enter a **Cheque no** where applicable) and the **Account** to be credited with the money received.
- If you enter an **Amount received** greater than the membership fee, the extra money will be accepted as a donation. If you enter too little money, you will be warned but can choose to disregard the warning if you have particular reason for doing so.

After entering all the Member Record information, press **Add member** to create a new Member Record and associated financial transaction. The Member Record will be displayed for confirmation and can be edited if required.

Notes:

After saving the Member Record a Map button will appear next to the Postcode field. This can be clicked to open a map as a check that the Post Code corresponds with the address.

*Additional information about how Beacon handles members with partners and joint membership is available in a separate document called **Members and Partners [8]** and extracts from the document are included in [Appendix D: Members and Partners](#).*

If an error occurs when adding a new member such that creation is aborted, the next membership number may already have been incremented. This may result in 'holes' in the membership number sequence. The same applies if an error occurs when someone attempts to join online.

4.4 Recent Members

Select **Recent members** on the Home Page to view a list of people who have become members recently, including those who have joined online.

The period for which new memberships are shown is set by the calendar controls at the top of the page.

After selecting one or more members, the following operations are available by choosing from the drop-down list below the table and pressing **Do with selected**:

- **Download names as a txt file**: generates a list of members as a string with the names separated by commas.
- **Send email**: opens a form on which to compose an email (see [6.1](#)).

- **Send letter:** opens a form on which to compose a letter (see [6.2](#))
- **Add to group:** presents a list of groups to add the members to.

4.5 Membership Renewals

Select **Membership renewals** on the Home Page. The membership Renewals page lists both Current and Lapsed members, as Beacon believes they are the members who might renew.

Note: Members with other status values cannot be renewed without first changing their status to Current or Lapsed.

For U3As with a fixed membership year, there are three options that can be selected using the radio buttons, all based on the "next renewal" date for the member in the system:

- **Next year:** those who have not renewed for next year. This option is only visible during the Advance Renewals period prior to the start of a new year.
- **Current year:** those who have not renewed for the current year, but did renew the previous year
- **Previous years:** those who didn't renew for either the current nor previous year.

For U3As with rolling membership years, all Current and Lapsed members are currently shown.

Note: A proposed future system enhancement is to provide two options using radio buttons:

- *Previous members who are due to renew or are up to 1 year overdue.*
- *Members who have not renewed for 2 or more years.*

After selecting one or more members, the following operations are available by choosing from the drop-down list below the table and pressing **Do with selected**:-

- **Send email:** opens a form on which to compose an email (see [6.1](#)).
- **Send letter:** opens a form on which to compose a letter (see [6.2](#))
- **Add to poll:** presents a list of polls to add the members to.
- **Renew Selected members:** (see 4.5.1)

4.5.1 To renew members

Note: If you have PayPal services enabled, members may also renew online which requires no manual intervention.

IMPORTANT

Members should only be renewed by this facility or online. Do not change the Member Record or enter a transaction directly.

If a member stops being eligible for Gift Aid, the "Gift Aid from" box on the Member Record must be blanked out BEFORE processing the renewal payment. Doing this does not affect the Gift Aid eligibility of Subscription Transactions already in the system.

Above the list of renewals, select the **Account** to be credited with the money received and the **Payment Method**. Renewals can only be made against one account and payment method at a time.

Then, for each member to be renewed:

- Locate the member in the list and check that their address and other details are still correct. If that is not the case, click on their name while holding down the **Ctrl** key to display (in a separate tab) their Member Record. Make the changes required, save and close the Member Record. The information in the renewals list (still open in its own tab) will be updated automatically.
- If the member has a partner at the same address, both may be renewed together. To do this, tick the checkbox in the **Incl Partner** column when both names will be grouped together and the expected renewal fee will be adjusted.
- Enter the amount received in the **Received** column. Any amount above the expected fee **Due** will be treated as a donation.
- Tick the checkbox in the **Select** column for the member.

When you have processed a number of renewals (it is recommended not to do too large a batch at a time in case an error occurs), select **Renew selected members** from the drop-down list and press **Do with selected** at the bottom of the list.

Note: Exercise caution if experimenting with this command – once *Renew selected members* has been pressed it is too late to go back.

If the payment method is by cheque, a confirmation page will be displayed of the renewals made. Here you may enter a **Cheque No** for each renewal. Press **Update** to save this. You do not need to press **Update** if you do not want to enter any cheque numbers.

4.6 Non-renewals

Select **Non-renewals** from the Home Page to show a list of members who have not renewed their membership.

This list operates in two modes, according to the option selected by the **Show** radio button at the top of the page.

- With the first option, people who were members during the last membership year but who have not renewed this year are shown, allowing for the defined grace period before they are considered not to have renewed. Members are considered to be Current until the end of any Grace period. They will remain shown as Current members until they are manually "lapsed". During this time and onwards, they will be shown in red in the Group members lists.
- With the second option, people who have not renewed for 7 years are shown. After this period there is no longer a requirement to keep financial records and the former members must be deleted completely from the system to comply with Data Protection Regulations.

After selecting one or more members in either of the two modes, the following operations are available by choosing from the drop-down list below the table and pressing **Do with selected**:-

- **Send email**: opens a form on which to compose an email (see [6.1](#)).
- **Send letter**: opens a form on which to compose a letter (see [6.2](#)).

4.6.1 To lapse members

Having first selected the **Show members who did not renew last year** option in the Non-renewals page, tick the members in the **Select** column. Then select **Lapse** from the drop-down list at the bottom of the page and press **Do with selected**. A confirmation dialog will be displayed. Press **Lapse** to proceed. The selected members will have their status changed from **Current** to **Lapsed**.

4.6.2 To delete long term non-renewals

Having first selected the **Show members who have not renewed for 7 years** option in the Non-renewals page, tick the members in the **Select** column. Then select **Delete** in the drop-down list below the table and press **Do with selected**. A confirmation dialog will be displayed. Press **Delete** to proceed with record deletion.

4.6.3 To change membership status

When it is known that a member will not be continuing their membership, their Membership Record should be updated to an appropriate **status** such as **Resigned** or **Deceased** (see [4.2](#)).

Notes:

- **Resigned** is used when a member has confirmed that they will not be continuing their membership, as opposed to **Lapsed** which is used when the member has not confirmed that they will not be renewing by the end of the grace renewals period. Experience has shown that lapsed members sometimes renew at a later date.
- If a **Deceased** member shared an address with another member, they should have their 'Share address with' changed to **<no-one>**.
- If a **Lapsed** or **Resigned** member shares an address with another member, it is recommended that you do not change the 'Share address with' to **<no-one>** – this link will be useful if the member re-joins (the Lapsed/Resigned member will not show up in an *Addresses Export of Current members*).

4.6.4 Removing members from groups

When a member has lapsed, resigned or died, their name will remain in any group list of which they were a member and they need to be removed.

Note: There is no mechanism by which the Group Leader is notified that their member has left. Therefore is probably best that whoever changes the member status also removes the member from any groups they belonged to (and notify the relevant group leader/s).

4.7 Membership Cards

Select **Membership cards** from the Home Page or the Membership Renewals confirmation page to see a list of members who have recently joined or renewed and who are therefore flagged as outstanding, in need of a membership card.

By selecting a different radio button near the top of the page, you may instead show members based on a poll, a combination of outstanding members and a poll, or all current members.

The following operations are available by choosing from the drop-down list below the table and pressing **Do with selected**:-

- **Send email**: opens a form on which to compose an email (see [6.1](#)).
- **Send letter**: opens a form on which to compose a letter (see [6.2](#))

Notes:

- *Beacon membership cards are designed to be printed onto standard 85 x 54mm business cards, 10 per A4 sheet. Every card numbers include C32011, C32026, C32070 and C32075.*
- *The colour of the band on membership cards should be changed each year to make current and old cards easily recognisable. This is set up by your Site Administrator (see [8.3](#)).*
- *The barcode on membership cards contains the membership number and can be read by barcode readers.*

4.7.1 To download membership cards

By default cards are printed for the current membership year. By ticking **Advance expiry to next membership year** you can print cards with the expiry date incremented by one year.

Cards are printed in the same order as displayed in the list, so to re-order the cards by (say) the membership number, first click the blue 'No' column heading to re-sort the list.

If you wish to print onto an already partly used printer card, you may change **Print cards from sheet position** from 1 to the required starting card. Cards are numbered left to right then top to bottom.

To download a pdf file of membership cards select **Download cards** in the drop-down list below the table and press **Do with selected**. You will be asked "Mark selected cards as printed? (or Skip)". If you press **Mark**, those members will not appear in a future list of outstanding membership cards for download.

Alternatively, to download a sheet of blank cards select **Print blank cards** in the drop-down list below the table and press **Do with selected**.

4.8 Addresses Export

Select **Addresses export** from the Home Page to generate a list of members' names and addresses,.

Near the top of the page, select the **Format** you require:

- **Third Age Matters:** for an Excel spreadsheet in the format for TAM distribution.
- **Labels:** for generating sheets of address labels.
- **Excel:** for an Excel spreadsheet containing member names and addresses.
- **CSV:** for a comma-separated-values file.
- **TSV:** for a tab-separated-values file.

There are three rows of filters which may be used to select the members to be exported. These comprise members statuses and classes, poll and group filters. By ticking **Negate poll**, members except those assigned to the poll will be selected.

Press the **Download** button at the bottom of the list to download the selected members.

If the **Labels** format has been selected, options are displayed for changing the number and size of the labels according to the printer stock to be used. If you press **Save as defaults**, then the choices you have made will be retained on the current computer (assuming you selected the **Local computer** option when logging in).

You may also select the first label to be printed by changing **Print from sheet position**.

4.9 Statistics

Select **Statistics** from the Home Page to display current totals of members by status and class. Also the male/female ratio of members and the number who have email.

Press **Download PDF** to download this information as a pdf file.

5 Groups

Note: The generic terms 'Group' and 'Group Leader' are used in this User Guide. Beacon may be customised to display alternative terms such as 'Course', 'Convenor' or 'Coordinator'.

5.1 Groups List

Click **Groups** on the Home Page to show a list of active groups. To include non-active groups, untick **Show active only**. To display groups assigned to a particular faculty, select the **Faculty** in the drop-down list.

Groups for which you are a Leader are highlighted blue.

After selecting one or more groups, the following operations are available by choosing from the drop-down list below the table and pressing **Do with selected**:

- **Send email to leaders**: opens a form on which to compose an email (see [6.1](#)).
- **Download groups**: to generate an Excel file showing the Group Leader, Meets, Venue & Details.

5.1.1 Group Record

A Group Record may be displayed by clicking on a group name in the list of groups, or elsewhere where group names are shown.

The Group Record comprises four sub-pages:

- **Details** (see [5.2](#))
- **Schedule** (see [5.3](#))
- **Members** (see [5.4](#))
- **Ledger** (see [5.5](#))

You can select between these on the row beneath the Group Record title. The active sub-page has its name in black.

After making any changes to a Group Record, press **Save** to commit them.

Press **Delete** to remove the Group Record (or consider changing the **Status to Inactive**).

5.2 Group Record: Details

This holds basic information about the group, including its **Faculty** (optional) and **Status**.

- The **When** field is free text and used only to give general information about when the group meets, e.g. "2nd Thursday at 2:00pm".
- The **Start time**, **End time** and **Venue** are optional and are used as defaults when meetings and events are created.
- The **Contact** field can be used to give a person's name, telephone number or email address for enquirers to make contact, e.g. "Jane on 0123 456 7890".
- **Max members** is used if there is a limit on the number of members that the group can accommodate.
- Ticking **Allow members to join online** lets members join via the Members Portal
- Ticking **Enable waiting list** lets members join a waiting list via the Members Portal if the Max members figure has been reached.
- If **Notify Leader** is ticked the Leader will be notified by email when a members joins the group or the waiting list.
- When populating the **Information** field, be aware that this information may be visible to U3A members or the public, depending on how the Public Links are configured (see [9.4](#)).
- The **Notes** field is for private notes that are not displayed to the public.

5.3 Group Record: Schedule

This shows future meetings or events of the group. To show extra detail about the meetings where this is available, tick **Show Detail**.

5.3.1 To add new meetings or events

In the **Add Events** panel in the **Group Schedule**, select the date and time for the first event. Then select the number and frequency of events in the controls to the right. One frequency option will be something like “*4th Sat of each month*”. The number and weekday will reflect the date selected for the first event.

In the **Until** row, you may select either a fixed number of events to be created, or to create events repeatedly up to a selected end date.

When you have completed the other fields (which are optional but you should seek to give as much information as possible), press **Add Events** to create the new events.

5.3.2 To change an event

Click **edit** at the row end for the required event in the **Group Schedule**.

Make the changes required and press **Update**.

5.3.3 To remove an event

Click **delete** at the row end for the required event in the **Group Schedule**.

Note: At present there is no facility to change or remove several events at a time.

5.4 Group Record: Members

This is used to record U3A members who are members of the selected group.

- If a member is not current, their name will be highlighted in red. They should be removed from the group if they do not renew.
- Members without email are denoted by an icon of a letter with a red diagonal line through it.

After selecting one or more members, the following operations are available by choosing from the drop-down list below the table and pressing **Do with selected**:-

- **Send email**: opens a form on which to compose an email (see [6.1](#)).
- **Download Excel**: to download a spreadsheet of member details. You will be asked to choose which fields to include (email, telephone, mobile, address, emergency contact).
- **Download pdf**: to download a pdf file of member details. You will be asked to choose which fields to include in the document (email, telephone, mobile, address, emergency contact, photo (if available)).

5.4.1 To add new members to a group

There are 2 ways to add members on the **Group Members** page:

- By selecting a member's name from the **Add member by name** drop-down list and pressing **Add**, or
- By entering the member's membership number under **Add member by membership number**. More than one member may be added by separating the numbers by commas. After pressing **Add** you will be prompted to confirm that the correct members have been selected.
- If the Max members value has been reached, any additional members are placed on a waiting list with a 'waiting since' date.
- Click **Join group** to make a waiting member an ordinary member of the group.

*Note: Members may also be added to a group from the **Members List** (see [4.1](#)) and **Recent Members list** (see [4.4](#)).*

5.4.2 To remove members from a group

There are 2 ways to remove members on the **Group Members** page:

- Individually by clicking **remove**, or
- Several at a time by ticking the members in the **Select** column, selecting **Remove Members** in the drop-down list below the table and pressing **Do with selected**.

5.4.3 To add a group leader

A group leader must first be added as a member of the group. Then click **make leader**. More than one leader may be assigned to any group.

5.4.4 To demote a group leader

Click **cancel leader**. The person will remain a member of the group.

5.5 Group Record: Ledger

This can be used as a basic facility to assist group leaders to account for monies paid and received. There is no connection between these ledgers and the main Treasurer's ledger.

On entry, all transactions are shown for the group between the selected dates (which default to the current financial year) together with the incremental current balance.

5.5.1 To add a new transaction

Under **Add transaction** enter the **Date**, **Payee** and **Detail** (the reason for the transaction). Then the amount, **In** or **Out**. Press **Save** to commit.

5.5.2 To edit or remove a transaction

For security reasons, transactions cannot be edited or removed. If an error has been made, add a new transaction but with reversed amount (**In** <> **Out**), to cancel the original.

5.6 Add New Group

Click **Add new group** in the list of groups or from an existing Group Record. At first only the **Details** sub-page is shown. Upon saving this, the other sub-pages will appear.

5.7 Group Venues

To display a list of current venues, click **Venues** on the Home Page.

To show a **Venue Record**, click on the venue name.

After making any changes to a Venue Record, press **Save** to commit them.

Press **Delete** to remove the Venue Record.

5.7.1 To create a new Venue Record

Click **Add new venue** from the list of venues or an existing Venue Record.

All fields in a Venue Record are optional except the venue name.

Private address should be ticked if the venue is a private residence or somewhere else for which the details should not be displayed in publicity (such as in online group information). **Accessible** may be ticked to indicate that the venue is fully accessible.

Buttons next to the **Postcode**, **E-mail** and **Website** fields may be used to view a map of the address, send an email or display the venue's website, respectively.

Press **Save record** to create the venue.

Note: Some groups and trips meet at one venue before travelling to a different location. To deal with this situation you may find it worthwhile creating 'meet at' venues, e.g. "Meet at the Station car park".

5.8 Faculties

Faculties may be used to group together similar groups. The list of current faculties is displayed by clicking **Faculties** on the Home Page.

Press **edit** to change a faculty name and **Delete** to remove the faculty.

5.8.1 To add a new faculty

Enter the faculty name under **Add new faculty** and press **Save**.

5.9 Calendar

The calendar is a chronological list of meetings and events. All group events are incorporated automatically into the calendar. In addition, it is possible to add general or open meetings.

The calendar shows events between the displayed dates, which defaults to the next 3 months. You may change the dates in the From and To fields.

At the top of the calendar you can choose to **Show all** events between the displayed dates, only those events for groups of which an individual is a **member** (select their name from the drop-down list) or only those events that take place at a selected venue.

By ticking **Show detail**, you will also see additional detail for events where this is available.

You may go directly to the event record (perhaps to edit it) by clicking the event's date/time in the list. You may go to the Group Record by clicking the group name. You may go to the Venue Record by clicking the venue name.

Where a venue's postcode is known, a **map** link will display a map of the location.

5.9.1 To download the calendar

Click **Download PDF** at the bottom of the calendar to download the displayed events.

5.9.2 To view or add open meetings


Click **Open Meetings** at the top of the page. A list of open meetings is displayed with a layout similar to that for group meetings (see [5.3](#)). You may add, edit and remove meetings in the same way as for group meetings.

6 Emails and Letters

6.1 Emails

Emails may be sent from many places within Beacon. When an email operation is selected, the **Send E-mail** page is displayed.

6.1.1 To send an email

- The **From** address is taken from your Member Record. Additionally, if you are assigned to an office (see [9.3](#)), the office email address will also be shown and it will be the default. You should select the address that you want to use.
- The list of addressees is displayed under **To**. This is for information only, they cannot be changed here.
- Tick **Tick to receive copy** to receive a copy of the message.
- Enter a **Subject** for your message and then the message below.
- You may customise your message by inserting into the subject or message text any of the # tokens shown on the right. When the message is sent, these tokens will be replaced by the corresponding information for the member to whom the message is being sent. **If the #FAM token is selected for a member who does not have a Familiar Name recorded their #FORENAME is used.**
- If you wish to send one or more attachments with the message, press the button next to **Attachments** (the format will vary between browsers) and select each file in turn. The files will be listed under the button. To remove any file, click on the small **x** before the filename.
- To include a website link in your message, put the cursor at the position where the link is to be and press the **Link** button in the editor: In the dialog that appears, enter the full URL (including the http or https prefix) and the Text to Display. 
- To avoid your email being suspected of being spam because of the way our mail agent encodes URLs, the text to display should be a meaningful description of the webpage you are linking to rather than a copy of the URL.
- By selecting from the Link List within the Link dialog, you can insert directly URLs for membership applications and renewals online. However, you will need to draft your own text to display.
- To edit a link, click on the link and then press the **Link** button.

After you have finished composing the email press **Send** to send the message.

Notes:

- *All messages are sent to recipients individually. Therefore, no recipient can see who else the message is sent to.*
- *You can vary the line spacing in the message by using hard or soft returns:
A Hard Return (using Enter) gives a full line space before the next line of text.
A Soft Return (using Shift+Enter) will put the following words on a separate line immediately below the preceding text.*
- *There is no practical limit to the number of attachments, but many email servers impose limits on the number or size of attachments that recipients can receive. It is wise, therefore, not to send more than a few attachments with any one message and to minimise attachment size.*
- *It is recommended that attached files don't have long names or names that contain special characters such as brackets because these can sometimes cause delivery problems.*

- *If the email browser is left open for a long time it may time out. Therefore long emails are best composed outside of Beacon before copy and pasting into Beacon (or put the text into an attachment).*
- *For additional recommendations about sending emails, refer to [Appendix A: Recommendations for using email](#).*

6.1.2 Standard messages

If you send similar messages regularly they can be saved as standard message templates and recalled for use again later. In that way you do not have to compose them each time.

To create a standard message, compose the message and click on **Save as standard message**. You will be asked to give the message a name. Note that only the subject and message are saved, not the recipients or attachments.

To re-use a standard message, select the message by name from the **Load standard message** drop-down list. You may edit it, if necessary, before sending.

To remove a standard message, select it as above and then click **Delete standard message**.

6.1.3 Email delivery

You can check upon the progress of emails sent, to see if they have been delivered. If the recipient views images in their emails, you can also see if and when the message was accessed by the recipient. You can see whether or not the recipient clicked on a website link within the message, such as to make a membership renewal.

Particularly when sending a message to many members, a check should be made that they have not bounced due to invalid email addresses.

To check **E-mail delivery**, select this option from the Home Page.

A list is displayed of messages sent in the last month by yourself. Click to check the status of an individual message. A list of all recipients will be displayed showing the message status for each of them. Message failures are shown in red.

Statuses are:

Despatched by Beacon

The message has been sent to our email agent.

Processed

The message has been received by our email agent but not yet forwarded on.

Deferred

Our email agent is unable to establish communication with the recipient's email provider in order to forward the message on. The sending of Deferred messages is automatically retried at intervals over a day or more until repeated failures cause the message to be rejected.

Dropped

The message has been rejected by our email agent. This is either because the email address was in an invalid format, or because a previous email to this address was Bounced or Reported as Spam. Such an email address is blocked by our email agent (we say it has been blacklisted), and can only be unblocked by the Beacon Support Team.

Delivered

The message has been accepted by the recipient's email provider, though it may have gone to the recipient's spam folder rather than their inbox. Note that some email providers may silently bin the email without delivering it to a spam folder if the software guesses it is probably spam. Hotmail is particularly fierce in this regard.

Bounced

The message has been rejected by the recipient's email provider, usually because the address is incorrect, disabled or no longer valid. The error message returned is displayed in red and should be examined. Invalid email addresses should be removed from Beacon.

Opened

The message has been received by the recipient who has downloaded it onto his/her computer. Note that the method by which our mail agent detects this is by the automatic inclusion of a tiny image in the message. If the user has a setting where they don't view images in emails this **Opened** status will not be set, even though the recipient has read the text of the message. Therefore more recipients will have opened an email than is indicated by this status.

Clicked

A website link within the message has been clicked on by the recipient. The link clicked is indicated. In distinction to the above status the **Clicked** status should always be true if the user has clicked on the link in your message.

Spam report

The message (or perhaps an attachment associated with it) has been rejected as spam. This is a serious situation that should be investigated immediately. An isolated spam report is not a disaster but repeated spam reports will damage Beacon's reputation and could adversely affect all users.

Emails sent through Beacon

Beacon uses a commercial email agent (SendGrid) to despatch messages and to provide us with details about progress. We have our own dedicated IP address so that our messages are not rejected because of misuse of the system by another party. However, all U3As using Beacon share this dedicated IP address, and a transgression by a user of one U3A could still affect everyone else.

We therefore require all U3As to ensure that the system is used responsibly and in particular to ensure that messages that could be construed as spam are not sent. **You MUST follow the guidelines shown in [Appendix A: Recommendations for using email](#).**

All messages sent by Beacon have a 'From' address of noreply@u3abeacon.org.uk and recipients will see them as having come from (for example) 'John Smith via MyTown U3A'. This is to circumvent problems with certain mail hosts, in particular AOL and Yahoo, whereby messages from users with email addresses of these hosts may be rejected when coming from third-parties such as our mail agent.

Ordinarily, recipients can still reply directly to the sender (such as by pressing a 'Reply' button) as the 'Reply-To' header in the email is set to the user's own address. However, a few mail programs may not do this.

The progress of messages can be monitored through Email Delivery. In addition, where messages are bounced, dropped or are the subject of spam reports, an email will be sent by Beacon to the sender naming the offending email address and describing why the address has been blacklisted.

All message failure reports should be treated seriously. Rejected email addresses should be verified, (most of them are simple spelling errors) and corrected or removed from Beacon as soon as possible if not proven to be valid.

Rejected addresses are added by our mail agent to a blacklist and any further attempt to send to these addresses will be rejected (with a 'dropped' error). We clear the blacklists periodically but you cannot expect this to be a frequent operation. You may ask for a specific address to be removed from a blacklist but you must first confirm that it is valid by sending a message to it, and receive a reply, outside of Beacon. We cannot assist in investigating why specific addresses are rejected.

When asking for an address to be removed from the blacklist, it is extremely helpful if you can forward the notification email to make the de-blacklisting as easy as possible for the Beacon Support Team.

6.2 Letters

Letters are one page documents that are personalised with members' details (Name, Address, Membership number, etc.). A typical use is for personalised Membership Renewal forms for members to review their details before signing to indicate that they wish to renew.

Letters may be created from many places within Beacon. When a letter operation is selected, the **Send Letter** page is displayed.

6.2.1 To compose a letter

- The list of addressees is displayed under **To**. This is for information only, they cannot be changed here.
- The # tokens shown on the right side can be inserted to personalise the letter for each recipient. If the #FAM token is selected for a member who does not have a Familiar Name recorded their #FORENAME is used instead.
- Website links can be inserted as described in the email section (see 6.1).
- After you have finished composing the letter press **Download** to generate the letters in a pdf file.

Notes:

- *You can vary the line spacing in the letter by using hard or soft returns:
A Hard Return (using Enter) gives a full line space before the next line of text.
A Soft Return (using Shift+Enter) will put the following words on a separate line immediately below the preceding text.*
- *If the letter browser is left open for a long time it may time out. Therefore long letters are best composed outside of Beacon before copy and pasting into Beacon.*

6.2.2 Standard letters

If you create similar letters regularly they can be saved as standard letter templates and recalled for use again later. In that way you do not have to compose them each time.

To create a standard letter, enter the message (including tokens if required) and click on **Save as standard letter**. You will be asked to give the letter a name. Note that only the message is saved, not the recipients.

To re-use a standard letter, select the letter by name from the **Load standard letter** drop-down list. You may edit it, if necessary, before sending.

To remove a standard letter, select it as above and then click **Delete standard letter**.

7 Finance

Additional information about Beacon Finance operations is available in a separate document called **Financial Transactions in Beacon** [9] and extracts from the document are included in [Appendix E: Financial Transactions](#).

7.1 Financial ledger

Beacon's financial ledger is a collection of transactions showing all monies received or paid in any of the U3A's bank accounts. All transactions are assigned to one or more financial categories in order to group together similar expenditure and income for analysis and reporting.

The account/category design of the ledger inherently ensures robust bookkeeping practice that avoids discrepancies (except in relation to incorrect data entered by the user).

The **Ledger** may be displayed **by account**, **by category** or **by group**. Select the appropriate option on the Home Page.

Ledger by group shows all transactions within the main ledger that have been associated with a group. You may select to show the transactions for one or all groups. This option does *not* show the content of the separate group ledgers.

All options produce a similar listing. The **Account**, **Category** or **Group** is selected at the top of the page together with the financial Year. By default, the current year is shown.

7.1.1 To view a Transaction Record

Click on the **Transaction** number on the left side of the ledger. The Transaction record is displayed.

7.1.2 To view a Member Record

Where a transaction is associated with a member, the **Membership No** is displayed. Clicking on this will take you to the corresponding Member Record (see [4.2](#)).

7.1.3 To download the displayed ledger

Press **Download Excel** or **Download PDF** at the foot of the list.

7.1.4 To update the brought forward

When the financial year rolls over, a brought forward for each account is calculated automatically by Beacon. However, it may happen that by the end of a financial year not all of last year's transactions will have been entered, or it may be necessary subsequently to change one or more transactions.

To update the brought forward amount, press **Update B/F** at the top of the ledger by account.

Note: this button is only present when the current year's ledger is displayed. It is not possible to change the brought forward to any year except the present. Also the function operates only on the currently displayed account. To update other accounts, they must be displayed individually and updated.

7.2 Transaction Record

You may display a Transaction Record from a ledger and from certain other places where transaction numbers are displayed by clicking on the transaction number.

7.2.1 To add a new transaction

Click **Add transaction** on the Home Page or the ledger.

IMPORTANT: Transactions should not be entered directly for membership applications or renewals. Use the specific links on the Home Page for these operations.

At the top of a transaction you must choose whether it refers to **Money received** or a **payment**. Enter the person (or body) **From** whom the money has been received or **To** whom it has been paid. Then enter the **Amount** which should always be a positive figure.

Select the **Date** and enter a **Cheque No** or **Payment Method**. The latter is optional. Typical payment methods might be Cash, BACS, SO (standing order). Online is shown for automatic PayPal payments.

Detail should give a concise reason for the payment. The **Cleared** field (if present) is set by the system when reconciliation takes place.

Transactions can be linked to 1 or 2 members or a group by selecting from the **Associate transaction with** drop-down lists. This is done automatically for new member and renewal receipts (see 4.3 and 4.5 respectively).

On the right side is a list of defined financial **Categories**. You must assign the money paid or received to one or more categories such that the total of the categories equals the **Amount** field. You will not be able to save the transaction if this is not the case.

Normally categories should be entered as positive amounts for a payment or receipt. However, PayPal commission is shown as a negative amount (as it is deducted from the positive membership fee pre-receipt by the U3A) and this is correct.

When all is complete, press **Save** to commit the transaction. If you press **Save & Add Another**, a new transaction will be shown to enable a succession of transactions to be entered efficiently. Otherwise the saved transaction is redisplayed as confirmation.

If it is required to edit a transaction, make the changes and then press **Save**.

Note: if there is an error on a cleared transaction, an 'adjustment' transaction should be added to correct the error.

7.2.2 To delete a transaction

Ordinarily, for reasons of financial integrity, transactions should *not* be deleted. Instead a new transaction should be added that negates the original (a payment for a receipt and vice-versa).

However, if a genuine mistake has been made that is recognised straight away (a transaction being entered twice, for example) it may be deleted by pressing **Delete**.

Note: All changes to data throughout Beacon are audited (see 9.2).

Transactions that have been cleared cannot be deleted.

7.3 Transferring Money Between Accounts

It is sometimes necessary to transfer money between accounts. A common example for U3As with PayPal enabled will be to transfer funds from the PayPal account to their current account.

Select **Transfer money** from the Home Page or a ledger. This displays a simplified transaction form. Select or enter all fields, although Notes is optional. Press **Save** to commit.

7.4 Credit Batches

When several cheques **and cash** are paid into a bank at the same time, it is usual for a bank statement to record only the total amount, not each individual cheque. This can make it difficult to reconcile the statement against individual transactions.

Credit batches are a facility to make reconciliation simpler. All cheques **and cash** paid in at one time are assigned to a credit batch and the batch appears in the reconciliation listing. When the bank statement entry is reconciled against the credit batch, the component transactions are reconciled automatically.

Select **Credit batches** from the Home Page or a ledger. A list will be shown of all credit batches that are **Uncleared** (not yet reconciled). Alternatively, all batches **Since** a selected date may be viewed. The **Account** may also be changed.

7.4.1 To view a transaction

Click on the **Transaction Ref**. The Transaction Record will be displayed (see 7.2).

7.4.2 To create a new credit batch

Click on **Add credit batch**. (This may also be done directly from a ledger)

A list is displayed of all outstanding payments for the selected Account. Select the ones to be paid into a bank by ticking the corresponding checkboxes. Press **Create Batch** at the foot of the list. An **Optional reference** may be given to the batch.

7.5 Reconcile Account

Reconciliation is the process of ensuring that Beacon's ledger and your bank statements are synchronised, enabling any discrepancies to be identified.

Select **Reconcile account** from the Home Page or a ledger. Select the **Account** to be reconciled, enter the bank **Statement End Balance** and select the **Statement End Date**. Press **Show**.

A list of all uncleared (unreconciled) transactions for the account will be shown together with the **Balance Difference** between Beacon and the bank statement at the top of the list. The aim of reconciliation is to reduce the balance difference to zero **and to ensure that any difference is understood (e.g. caused by timing differences)**.

7.5.1 To reconcile the account

Go through the bank statement in order and identify matching entries in the reconciliation list. Tick the **Cleared** checkbox for each entry that agrees.

When complete, press **Reconcile Account** at the bottom of the list.

7.6 Financial statement

Click **Financial statement** on the Home Page to download a balance sheet of accounts and categories.

Select the financial **Year**. Indicate whether you want the **previous year's** statement to be included for comparison and whether or not a current membership count should be included. The membership count option is only available for a report of the current financial year and the figures given will relate to the current day.

Press **Download Excel or Download pdf** to proceed with the statement.

7.7 Groups Statement

Click **Groups statement** on the Home Page to show a summary of every group's accounts (as held in the Group Ledgers - see [5.5](#)) between the dates selected at the top.

To show individual transactions between the selected dates, tick **Show transactions**.

7.7.1 To download the Group Statement

Press **Download Excel** at the bottom of the statement. The statement will be downloaded in the format (with or without transactions) selected.

7.8 Gift Aid

As registered charities, U3As are eligible to claim Gift Aid relief on membership subscriptions and donations but only under tightly prescribed circumstances laid down by HMRC. As the operation of U3As differ greatly from one to another, it is not possible to generalise about whether or not any U3A may claim relief.

Beacon's approach is to determine the income that could be put forward for Gift Aid relief according to the rules of HMRC, *on the assumption that the user U3A is eligible to make such claims in the first place*.

Responsibility for deciding whether or not Gift Aid claims should be made rests entirely with the U3A.

Under System Settings (see [8.3](#)), there is a checkbox labelled **Tick to enable Gift Aid operation**. Each U3A must decide whether or not to tick this checkbox and be responsible for the consequences of doing so.

If the checkbox is ticked, Beacon will determine the income that can be submitted to HMRC for Gift Aid relief.

If the checkbox is not ticked, all Gift Aid functionality within Beacon will be turned off (although the Member Records will still record whether a member is eligible for Gift Aid claims).

7.8.1 Determination of income eligible for Gift Aid claims

Beacon follows strictly the HMRC rules in deciding how much of a membership subscription or donation may be declared for Gift Aid relief.

Ordinarily, Gift Aid relief may be claimed from that part of a membership payment that relates to the payer alone and only if the payer meets the rules for paying tax (the Gift Aid field in the Member Record is set).

However, if a member and his/her partner both belong to a membership class with the Joint or Family attribute set (see [4.2](#)), then relief may be claimed on the full joint membership payment if the payer alone meets the rules for paying tax.

Thus to maximise their Gift Aid relief, U3As should have Joint or Family membership classes in addition to those for individuals. The membership fee corresponding to a non-tax paying partner cannot otherwise be declared for Gift Aid relief.

*Note: Additional information about how Beacon handles members with partners and joint membership is available in a separate document called **Members and Partners** [8] and extracts from the document are included in [Appendix D: Members and Partners](#).*

7.8.2 Downloading a Gift Aid declaration

To download a Gift Aid declaration, select **Gift Aid declaration** on the Home Page. This option is present only if Gift Aid operation is enabled.

By default, the current financial year is shown and excluded are payments for which a declaration has previously been made.

To download a declaration spreadsheet, select the payments to be included by ticking the **Select** column (by default all payments are ticked) and press **Download Excel**.

After downloading, you will be asked **Mark transactions as claimed?** If you press **Mark**, a Claimed date will be added to each transaction and they will not appear again in a Gift Aid declaration.

Note: Although the spreadsheet format is correct for submission to HMRC, it is without the required header rows. Therefore the contents must be copied and pasted into the official spreadsheet. It is intended to eliminate this step in a future update.

7.9 Working with PayPal

To accept payment online for members joining or renewing their membership, your U3A will need to set up its own PayPal account and register as a charity with PayPal. Information about doing this is available in a separate information sheet [10].

Note: Your U3A's site configuration must be set up by the Beacon Support Team to enable PayPal operation.

Beacon makes a direct connection with PayPal using the email address of your PayPal account. You enter this address into System Settings when you set up PayPal. When someone pays using PayPal with the online application or renewal form, the amount they have paid is transmitted to Beacon automatically. The amount is divided between that available to the U3A in its PayPal account and that retained by PayPal as commission.

In 2017 the reduced charity commission rate was 1.4% + 20p; e.g. on a membership fee of £10 you pay 34p commission and on a fee of £20 you pay 48p.

The net amount is posted to Beacon's PayPal Account, which should reflect the balance on your account with PayPal. The gross amount is categorised as membership income and the negative commission as a separate financial category. You will see the total PayPal commission paid in your Statement of Accounts.

From time to time your treasurer should transfer money from your account with PayPal to your bank account. A minimum of £50 should be transferred each time to avoid additional PayPal fees. This transfer must be reflected in the Beacon system using the "Transfer Money" facility to transfer the same amount between Beacon's PayPal and current accounts.

Note: Beacon does not have access to or store any card details or other financial information. These are all handled exclusively by PayPal.

The information provided to PayPal should match that of a member's bank account (including address, county and postcode). If payment is refused by PayPal, the member should make enquiries of their bank.

8 Set-up Operations

These operations establish the working environment of Beacon for your U3A. Most options will not need to be changed often, if at all, although all will need to be confirmed for a new installation.

There are other configuration options for your site that can only be changed by the Beacon Support Team. You should apply to them if you think a change is needed (support@u3abeacon.org.uk). These options include the starting date for the financial and membership years, PayPal enablement, custom membership fields and terminology aliases.

8.1 System Users

Click **System users** on the Home Page to view a list of the people who have access to Beacon within your U3A. Members who are not current are highlighted in red. You should ensure that where access is no longer required, users are deleted.

Click on a name to enter the System User Record. Pressing the button next to the member name will take you to their Member Record.

- All users (except the special case of the Site Administrator) must be current U3A members.
- Site Administrators who are not also selected as U3A members must provide an email address. If this is not done, they will not be able to send emails.

Press **Save user** to commit changes to these fields. Press **Delete user** to remove a user.

8.1.1 To add a new user

Click **Add New User** from the System User list or an existing System User Record. New users are automatically assigned a temporary password but must be assigned to a role.

8.1.2 To set a user's password

It is not possible to ascertain a user's password, so if a user forgets it the only option is to re-set the password. Users can do this themselves if they can satisfactorily identify themselves (see 9.6) and so can a user administrator. To reset a user's password, press **Set Temporary Password**. The user will have to change their password again on first use.

8.1.3 To assign a user to roles

Every user must be assigned to one or more roles in order to access Beacon. Select the roles required at the bottom of the User Record and press **Save Role Assignment**.

8.1.4 Site Administrator

Each U3A (known to Beacon as a site) has a special user, the **Site Administrator**, who is created when the site is created. This user is given the username **admin** and the Full Name **Administrator**. Although both the username and the Full Name of any user can be changed, it is recommended not to change the admin user names. The site administrator need not be associated with a Member Record, but can be. The site administrator has an email address, which is independent of the address of any member.

The site administrator has ALL privileges, which in future may include some functions deliberately NOT visible on the role privilege page.

At start-up various roles (e.g. Treasurer) are created with a likely useful set of privileges. One such role is "Administration", but unfortunately when a site is created Beacon gives this role no privileges whatsoever. The Site Administrator is assigned this role, but of course can do all things despite having no assigned privileges!

A software change is planned, probably sometime during the first half of 2018, to give the Administration role all privileges.

8.2 Roles and Privileges

Roles are the means by which privileges are assigned to users. Privileges determine which parts of Beacon a user may access and the tasks they may carry out.

Roles should be considered as being equivalent to 'jobs', whereas users are people. When the person carrying out a particular job changes, a new user will need to be assigned to the role but the role itself should not normally need to be changed.

Furthermore, while many roles will only be undertaken at any one time by one person, other roles may be assigned to many people (group leaders, for example). All the users assigned to the same role will have the same privileges, but their activities in using Beacon will be audited individually.

To display a list of roles, click **Roles and privileges** from the Home Page. From here you may click on any role name to access the Role Record.

A **Role Record** comprises the role name, optional notes and a checkbox to indicate whether the role holder is a member of the U3A committee. Press **Save Role** to commit changes and **Delete role** to remove a role from the system.

8.2.1 To add a new role

Click **Add Role** from the list of roles or an existing Role Record.

8.2.2 To assign privileges to a role

Under **Privileges** assign the privileges required for the role. For good security, always assign the minimum privileges necessary to carry out the functions of the role.

- Clicking on a row or column header will toggle all privileges in that row/column.
- To remove privileges, simply untick the corresponding checkboxes.

Press **Save Privileges** to commit the assignment made.

- Privileges refer to distinct parts of Beacon and are subdivided, as applicable, with separate access rights for viewing, creating new records, changing existing records and deleting records. Note that the privilege to view will be required for anyone who needs to create, change or delete a record.
- Separate privileges are assigned to operations such as downloading documents, sending emails, etc. Users will not be able to send emails from any part of Beacon if their roles are not assigned the **Email: Send** privilege.
- Most of the operations to which privileges are assigned should be self-explanatory, but others may be less so.
- Group operations sometimes apply separately to 'all', 'as leader' and 'as member'. Roles that are assigned 'all' privileges can access the records for all groups. Those assigned 'as leader' can only access the groups of which the user is a leader. Those assigned 'as member' can only access the groups of which the user is an individual member.
- Operations such as 'Member classes' refer to setting up membership classes, not the selection of classes in Member Records, for example. Operation names often correspond to similar names on the Home Page.

8.3 System Settings

Click **System settings** on the Home Page to set various parameters for the operation of Beacon, including online membership payments via PayPal (see [7.9](#)).

- The colour of the band on membership cards is set by clicking in the **Membership card colour** box.

- If you change the option to **E-mail membership cards**, you should also change the system messages (see [8.4](#)) that are sent when people join or renew online to reflect the fact that there is, or isn't, a membership card attached.
- It is important that the correct mode of operation for **Membership fees** is chosen together with the **Advance renewals** and **grace** periods if membership renewals are to operate correctly.
- Each U3A must decide whether or not to **Enable Gift Aid operation**. See [7.8](#).
- The default town, county and STD code fields provide defaults (if required) for new Membership Records. They can be overridden at the time of creating a new record. If a default STD code is left in place without the addition of the telephone number, it is automatically removed upon saving.

Press **Update** to commit changes to system settings.

8.3.1 Custom Fields

Up to 4 **Custom Fields** can be included on the Membership Record. They have to be set up by the Beacon Support Team. Typical uses for Custom Fields include:

- One U3A uses 2 custom fields, one for **Leaving Date** and the other for the **reason**.
- Another U3A uses two custom fields, one to indicate the delivery round for **hand posting** of the newsletter and the second to indicate the people who **deliver** the Newsletters to those rounds. This allows management of the system following downloading the data to Excel and link to Google maps.

8.4 System Messages

Select **System messages** on the Home Page and then click in the drop-down box **to see the following system messages**:

- **Email when member renews online**
- **Email when new member joins online**
- **Home page notices**

These are generated automatically by Beacon but may be customised.

Home page notices are displayed at the bottom of the Home Page and may be used to communicate to users when they log-in. Clear the message to remove.

Tokens (on the right side) and links (at the bottom) may be included in messages in a similar way to their use in emails (see [6.1](#)).

Press **Update** to save changes to system messages.

8.5 Finance Accounts

Click **Finance accounts** on the Home Page to create or edit accounts. Finance accounts should correspond one-to-one with bank accounts (including PayPal).

8.5.1 To add a new account

Enter the account name under **Add new account** and press **Save**.

8.5.2 To change an account name

Click **edit** next to the account name. Alter the name and press the adjacent **Save** button to commit.

8.5.3 To change whether an account is current

Tick or untick the **Active** checkbox for the account. Inactive accounts do not appear in the current ledger.

8.5.4 To remove an account

Click **delete** next to the account name. You will not be allowed to delete an account if there are transactions recorded against it. In which case, consider making it non-current instead.

Note: Some accounts are locked. You are not allowed to change these.

8.6 Finance Categories

Click **Finance categories** on the Home Page to create or edit categories.

8.6.1 To add a new category

Enter the category name under **Add new category** and press **Save**.

8.6.2 To change a category name

Click **edit** next to the category name. Alter the name and press the adjacent **Save** button to commit.

8.6.3 To change whether a category is current

Tick or untick the **Active** checkbox for the category. Inactive categories do not appear in new transactions.

8.6.4 To remove a category

Click **delete** next to the category name. You will not be allowed to delete a category if there are transactions recorded against it. In which case, consider making it non-current instead.

Note: Some categories are locked. You are not allowed to change these.

8.7 Membership Classes

Membership classes are the means of determining the fee to be paid for membership. They can also have consequences for the claiming of Gift Aid (see [7.8](#)).

Select **Membership classes** from the Home Page.

A list of current classes is shown. Click on the class name to edit the Class Record.

8.7.1 To create a new membership class

Click **Add New Membership Class** from the list of classes or an existing Class Record.

Current indicates that the class may be used for new memberships.

The **Explanation** field will appear online to inform potential members as to what class of membership they should choose. The explanation should be clear but concise.

For each class you should consider whether to tick one or more of the following options which will determine how Beacon processes memberships:

- 1 of 2 people at same address (meeting the HMRC requirements of Family membership – see [7.8](#))
- Full member of another U3A (i.e. Associate)
- **Show to members joining online**

To save changes to a Class Record, press **Save Record**.

To delete a record, press **Delete Record**. Some class records are locked against deletion.

8.7.2 To assign membership fees to a class

The Class Record differs according to the **Membership Fees** option selected under **System settings** (see [8.3](#)).

If fees are **rolling** or **same fees all year**, a single **Fee per person** field is included in the main Class Record. Enter the fee and save as above.

If fees can **vary by month of joining**, a panel is shown below the main Class Record with one field for each month of the year (starting with the configured membership start month) plus another for renewals. You must complete all fields before pressing **Save Fees** to commit;

If you enter the fees from left to right and **Auto-propagate** is ticked, then the fee you enter will be copied automatically to succeeding months. In this way you will only need to alter the fee in the month(s) when it changes.

IMPORTANT: All membership fees must be **per person**, even for a Joint membership.

8.8 Member Statuses

Click **Member statuses** on the Home Page to create new statuses.

Current and **Lapsed** are mandatory statuses and cannot be changed. Some U3As find it useful to have additional statuses such as Resigned and Deceased to ensure that communications no longer go to these people during the period when their membership records must be retained to meet HMRC requirements.

8.8.1 To add a new status

Enter the status name under **Add new status** and press **Save**.

8.8.2 To change a status name

Click **edit** next to the status name. Alter the name and press the adjacent **Save** button to commit.

8.8.3 To remove a status

Click **delete** next to the status name.

8.9 Poll

Click **Poll** on the Home Page to display a list of polls.

Polls are a way of grouping members by some particular characteristic that may be used when filtering lists.

Members may be assigned to one or more polls by ticking the poll boxes in the Member Record or by selecting **Add to poll** in the Members list.

To add a new poll, enter a name in the **Add new poll box** and press **Save**.

To change a poll name, click **edit** next to the poll name. Change the name and press the adjacent **Save** button.

To remove a poll, click **delete** next to the poll name.

To remove all members from a poll, click **clear all assignments** next to the poll name.

Note: Typical uses for a poll include:

- *Committee members*
- *Members who don't wish to receive the Third Age Matters magazine*
- *Members who receive paper copies of newsletters or AGM documents*
- *Members willing to assist at meetings and events*

9 Miscellaneous Options

9.1 Personal preferences

Click **Personal preferences** on the Home Page. The preferences set here apply to the current computer or current user only.

9.1.1 Drop-down name lists & Timeout

The appearance and sort order of drop-down lists may be changed to suit personal preference. It can be an advantage to show the surname first as it allows any given surname to be located quickly by typing its first letter while the list has focus. The list then jumps to the first surname starting with this letter. This choice does not apply to other types of list.

When Beacon has been inactive for a period of time, you are required to login again. This is an important security precaution to reduce the likelihood of someone else using your computer after you have logged in and then left the machine.

By default, Beacon times out after 20 minutes and you should not make the delay longer on a shared machine (it would be better to reduce it). However, if you find this period inconvenient on a computer to which no-one else has access, you may change the **Session timeout** duration here.

Press **Save Name Lists & Timeout** to save these settings which applies to any user of the current computer. Local settings must be enabled at log-in.

9.1.2 Change password

To change your password, enter a **New password** and then **Confirm**. Press **Change Password** to bring the new password into effect.

9.1.3 Change personal Q&A

To change your personal question and answer click in the **Question** box. You can accept the default **Question** or change it to something else. Make sure that the **Answer** is something that you will remember (including the format) but which is unlikely to be known to anyone else. Press **Update Q&A** to store the new phrases.

9.2 Audit Log

Click **Audit log** on the Home Page to view records of all actions by any user that change data and certain other actions too. **You may change the period for which records are displayed by changing the dates in the From and To fields.**

The format is technically-orientated to assist support personnel, but users may find it useful to look at the audit log if something has not gone as expected.

There is a button below the table which may be used to remove audit entries before a specified date.

9.3 U3A Officers

Click **U3A officers** on the Home Page to record details of all your U3A offices and post holders. You may associate with each office a non-personal office email address (such as treasurer@myu3a.org.uk).

9.3.1 To add a new office

Enter details in the controls at the bottom of the table. Select a post holder from the list of current members. If an office does not have a non-personal email address, you may enter a personal address but this will not be entered automatically. Press **Save**.

9.3.2 To change details for an office

Click on **edit** to the right of the office name. The row will change to editable controls. Make the changes you require and press **Save** at the end of the same row.

9.3.3 To delete an office

Click on **delete** to the right of the office name. You will be required to confirm deletion.

9.3.4 To send an email

Select the offices to which you wish to send an email using the checkboxes in the **Select** column. Alternatively, click on the **Select** column header to toggle all the checkboxes on or off. Press **Send E-mail** to open up a form to compose the email (see [6.1](#)).

9.4 Public Links

Select **Public links** from the Home Page.

The URLs (web addresses) shown may be incorporated into a U3A's public website to give access to online services. Membership services require PayPal to be enabled.

When using a URL, make sure that the entire link is included.

The options visible to members or the public are configured on this page.

See chapter [10](#) for more information about online services.

9.5 Data Export and Backup

This facility is provided to allow U3As to download their data for use in external applications, reporting tools, etc. and also so that they can keep backups of their own data locally if they wish to do so. Although Beacon data is backed up daily on the server, it is a good idea to have local backups as well.

Select **Data export & backup** from the Home Page.

Data can be downloaded in either of two formats: Excel or CSV. Select the option you require near the top of the page.

According to the format you select, a different list of downloads will be displayed. You can download the same data in either format, but whereas Excel can contain related data on different worksheets within the same spreadsheet, CSV files can only contain one kind of data. There are therefore more options when selecting CSV.

There is, however, one additional option under Excel: **Backup all data**. If this is selected, all the data that can be downloaded individually by the other options will be downloaded as a single spreadsheet. This is therefore the best option for backing up all data.

Click on the download you require. You will be asked where to save the file and the download will then take place.

Notes:

The 'keys' in the Excel files such as mkey (member), akey (address), gkey (group), etc. are unique identifiers that link data across data sets.

Refer to [Appendix B: File Downloads](#) for a full list of available downloads.

9.6 Recovering a forgotten Username or Password

If you have forgotten your username or password, you may be able to recover it. Use the **Click here** link on the log-in page and complete the requested information. Then press **Submit**.

If you are able to be identified, you will then be asked the answer to your personal question. Make sure that you type this in the same format as when it was originally set.

If your answer is correct, you will be sent an email with your username and a new temporary password, which will need to be changed at first log-in.

If this procedure fails, seek the assistance of your Site Administrator who can supply the information to you.

Note: you cannot recover a password for a Site Administrator by this means. If you cannot log in as a Site Administrator, you must contact the Beacon Support Team to re-set your password.

9.7 Temporary Passwords

All users are initially assigned temporary passwords. A temporary password is also assigned if your password has to be re-set for any reason. Temporary passwords must be changed at first log-in. In this way no-one should know your password except yourself. Keep it somewhere safe but well disguised so that it cannot be accessed by anyone else.

After logging in with a temporary password, the **Password Change** page is shown.

Enter a **New Password** and **Confirm** by entering it again. Abide by the guidance given as to the requirements for passwords.

Then enter a **personal question and answer**. You may answer the default question or you may replace this with something else. Make sure that the **Answer** is something that you will remember (including the format) but which is unlikely to be known to anyone else.

Press **Submit** to commit your new password and Q&A.

10 Online Services

These services are available for access by members or other people via your public U3A website. Click **Public links** on the Home Page to see the URLs (web addresses) that must be embedded in your website in order to access these services (see [9.4](#)). You should accompany these links with some explanation of their purpose.

10.1 New Member Applications

This service requires PayPal to be enabled.

The format is similar to when adding a new member manually (see [4.3](#)). However, instead of entering an amount already received, the user presses **Make Payment** and is taken to PayPal to make their payment there. If the payment is confirmed, PayPal notifies Beacon and the new membership and financial transaction are entered into the Beacon database.

There is no need for U3A officers to take any action to confirm new online members. However, the members who have joined may be viewed under **Recent members** (see [4.4](#)) and the transactions in the ledger.

When U3As create links from their website to online services, they should make it clear that the link for New Member Applications should not be used by members renewing. Renewals should be carried out only through the Members Portal. A message is displayed when New Member Applications is launched to confirm this.

10.2 Members Portal

This is a gateway to online services for existing members. They will need to identify themselves to enter, with their name, membership number, postcode and email address.

Which options appear can be configured under **Public Links** from the Home Page.

10.2.1 Membership renewals

This service requires PayPal to be enabled and the option will only appear if the member's renewal is due (in or beyond the advance renewals period).

Members can only renew with the same membership class as previously. Joint members must renew for both partners at the same time. Renewals involving any change of membership class cannot be made online. However, two people with individual (not joint) membership who share an address may choose to renew one or both members at the same time (assuming that renewals are due for both).

When the user presses **Make Payment**, they are taken to PayPal to make their payment. If the payment is confirmed, PayPal notifies Beacon and the membership is renewed.

- If members wish to change their membership class or if their personal details used for verification have changed, they cannot renew online.
- If a member has already renewed for the current year (or the following year if within the configured advance renewals period), they are informed of this and the procedure terminated.

10.2.2 Groups list

This option shows all current groups. By clicking on the arrowhead to the left of any group, the information about the group is expanded. This can include when the group meets; venue; contact; and general details. Which fields are displayed can be configured through **Public Links** from the Home Page.

The list may be downloaded as a pdf document by pressing the **Download** button at the bottom of the page. (This option is also configurable)

10.2.3 Calendar of meetings and events

Radio buttons at the top of the page enable the following options to be shown:

- All future meetings and events
- All future meetings and events for a specified group
- All future meetings and events for group to which the member belongs, plus open meetings.

By clicking on the arrowhead to the left of any event, the information about it is expanded. This can include the venue; contact for enquires; and general event details. Which fields are displayed can be configured through Public Links from the Home Page.

10.2.4 Change personal details

This option allows members to change most of their personal details: address, telephone number, email, photo, etc. It also includes a Personal Question and Answer which, if provided, will be used to further enhance login security.

Pressing **Update Personal Details** commits changes made. An email is sent to the member (at both old and new email addresses if this has been changed) to confirm that changes have been made.

10.3 Public Groups List

This link is provided for public access. The information shown is similar to the groups list in the Members Portal (10.2.2) but the fields that are displayed are configured separately, allowing less information to be shown to the public than to members.

10.4 Public Calendar

This link is provided for public access. It is similar to the calendar in the Members Portal (10.2.3) but the fields that are displayed are configured separately, allowing less information to be shown to the public than to members. Unlike in the Members Portal, the public list cannot be personalised.

Note: It is possible to inhibit the display of any particular meeting or event in the public calendar.

11 U3A Beacon Users Forum

The Beacon Users Forum has been provided to support people using Beacon and to allow users to give feedback about possible bugs, usability issues and suggestions for new features.

The Forum is a peer-to-peer resource to enable users to help one another. It is monitored from time to time by the Beacon Support Team who may respond to unresolved issues. They will also take the feedback into account when deciding upon future changes.

11.1 Registering to use the Forum

Registration for the Forum is quite separate from the administration of Beacon itself. You may access the Forum at

<https://forum.u3abeacon.org.uk/>

or use the link from the Beacon Home Page.

To register as a new Forum user, use the **Need to register?** link towards the bottom right corner of the Forum log-in page. You will be sent an email with details of how to confirm your registration and this must be done before you can post to the Forum threads.

11.2 Using the Forum

When you log-in, you will see a list of current forums.

Click on the forum you wish to enter to see a list of the threads (a related series of messages) that are already present. Search the list to see if someone else has already created a thread relating to your enquiry. You can scroll through or use the 'Search this Forum' box on the right side near the bottom of the page. You should add to an existing thread where possible unless the thread is marked as 'Closed' or 'Resolved' so that all related postings are grouped together as a single resource and so that you gain from the experiences already posted. Your query may already have been answered!

To add to an existing thread, use the Quick Reply box at the bottom or press a New Reply button (on the right side). When you have completed your entry, press Update Post at the bottom.

To create a new thread, press Post Thread from the list of threads. When you have completed your entry, press Post Thread at the bottom.

When you create a Subject for a new thread, please give a succinct summary of the topic so that it will be meaningful to anyone else with a similar query.

Just above the Update Post or Post Thread buttons there are four radio buttons labelled 'Thread Subscription'. Select 'Subscribe and receive email notification of new replies' in order to be advised when someone responds to your message. If you don't do this, you will have to keep coming back to the forum to see if anyone has replied.

The forums are moderated. Inappropriate postings will be removed and others may be edited (especially the Subject) or moved to make them more useful to other people.

11.3 Keep up to date

Each time you come to the forum, click on View New Posts near the top of the page to see what's been added since you last visited.

To get back to the list of forums at any time, click on the 'U3A Beacon Users' Forum' link which is a little below the MyBB page heading.

For more help in using the forum, press the Help link in the top right corner of any page.

Appendix A: Recommendations for using email

Sometimes Beacon emails are undeliverable. There are five ways that this may be shown:

- Bounced Bounced as undeliverable
- SpamReport Reported by the recipient or their mail software as spam
- Blocked/expired: Not been able to be delivered by our mail agent
- Dropped: Dropped by our mail agent
- Delivered: Silently dropped by the recipient's mail server as likely to be spam

The first four are reported back to Beacon and shown in red on the email delivery reports page, the fifth is undetectable and will be reported as delivered. Only the first two cause our mail agent, SendGrid, to "blacklist" (Beacon terminology) the recipient email address, and whilst blacklisted further emails to that address will be dropped by SendGrid.

In all four detectable undeliverable cases, Beacon will send an email message back to the sender, explaining the type of error, and including the reporting system error code. These messages should be forwarded to your Site Administrator for investigation.

For errors of type 1 (Bounce) the email will say:

"The bounced address has been added to our mail agent's blacklist and further emails to this address will not be delivered, until the address is removed from the blacklist. You should verify, remove or correct this email address. Often the reason is an incorrectly spelled address. However, if you have verified the address by contacting the recipient by email outside Beacon, you can apply to support@u3abeacon.org.uk to have the address removed from the blacklist."

For errors of type 2 (SpamReport) the email will say:

"Their email address has been added to our mail agent's blacklist and further emails to this address will not be delivered, until the address is removed from the blacklist. It may be that they no longer wish to receive emails from your U3A. If so, remove their email address from their Member Record. If they confirm that they do wish to receive emails from your U3A via Beacon you can apply to support@u3abeacon.org.uk to have the address removed from the blacklist. It is also suggested that they add noreply@u3abeacon.org.uk to their email contact list, as this may prevent their email software from treating your emails as spam."

Sending Emails from Beacon

There are a numbers of ways in which both the senders and recipients of emails can reduce the likelihood of emails not being delivered:

1. Minimise the frequency of sending emails to similar large lists (over 50) of recipients. It is better to delay until you have more information to put into a single email.
2. Avoid sending emails that the majority of recipients won't bother to open. It encourages the system to assume that messages from the sender are spam.
3. If you are sending an email to a large number of people, say over 50, please accept that your email will be processed by spam filters in the same way as mass marketing emails. Therefore you should follow the following industry guidelines for such mail.
 - i. Avoid or minimise sending attachments when sending an email to large lists of recipients. It is tempting to do so, as Beacon and SendGrid enable you to do so, but it is recommended instead to put the files on to your website and to provide a weblink to let the user download the file if they want. You can alternatively use services such as Dropbox
 - ii. When putting a link (URL) into an email, do NOT use the URL itself as the clickable visible text. Instead use some descriptive English text. Note that this is the opposite of Beacon's previous guidance and is due to the way SendGrid handles links, and you may need to change some of your standard email messages
 - iii. Maximum organisation visibility helps as well. Including your physical mailing address and phone number in your email footers helps mail providers recognize you as a legitimate

organisation and sender of email. This also helps your recipients know that this message is indeed from you!

iv. Provide an explicit way for the recipient to unsubscribe from getting emails from you, even though you know they have said they want such emails. For example at the bottom of your email: *"To unsubscribe from these mails email Memsec@yourU3A with subject unsubscribe from emails."*

The Beacon Support Team will look to see if we can automate adding such a message to your email in future.

4. SendGrid and Beacon often cannot tell that an email has been opened. SendGrid, like other mailing agents, uses a hidden 1 pixel as its only means of detecting that an email has been opened. If a user switches off viewing images, as often is the case when reading an email in preview mode, then this detection method does not work.

Receiving Emails from Beacon

Emails arriving in Spam or Junk folders can usually be dealt with by right clicking and picking from the available options like **Not spam** or **Never block sender**. This will add the sender's email address to a Safe Senders List and stop future emails from that sender going into Spam or Junk folders. Members should also check that the sender's email address is not on a Banned senders list.

The method of changing Junk/Spam settings varies depending on who the email provider is and whether it is accessed via a website or via an email application such as Microsoft Outlook. Details for some of the more commonly used email providers and applications are shown below.

Apple products

There are no junk mail settings on iPads, iPhones and Macs apps. Users need to log in via their email provider's website and adjust the settings there.

Outlook.com (including Hotmail)

Log in to Outlook.com and have a look in your **Junk mail folder**. If there are any U3A emails in there right-click the email and choose **Not junk**. The email will be moved to your inbox.

Click on the gear wheel icon (top right) to open the **Settings** menu and click **Options**. Under Junk email, click **Blocked senders**. If there are any U3A addresses in the list, select them and then click the dustbin icon to remove them from the Blocked Senders list.

Click **Safe Senders** (under Junk email). Type "noreply@u3abeacon.org.uk" in the box and click on the plus sign to add that email address to the Safe Senders list.

Sky/Yahoo Email

If an email arrives in the Spam folder, click **More** (or right click) followed by **Not spam**. This will move the email to the Inbox.

To check what is on your Banned Addresses list, click the gear (cog) icon, followed by **Settings** and then **Banned addresses**.

Microsoft Outlook

If an email arrives in in the Junk folder, right click and select **Junk**, followed by **Not Junk**. This will move the email to the inbox and advise you that "Outlook will not block future emails from noreply@u3abeacon.org.uk".

Alternatively, you can click the Junk icon in the top menu or right click the email and select either **Never block sender** or **Never block sender's domain**.

To add the U3A email address to your safe senders list, click the **Junk** icon in the top menu, followed by **Junk email options**. Click the **Add** button on the Safe senders tab and enter noreply@u3abeacon.org.uk in the box.

Appendix B: File Downloads

The table below shows the Excel and PDF files that can be downloaded from various pages within Beacon.

A number in the first column indicates that a similar Excel worksheet can be generated from the **Data Export and backup** page as shown by the corresponding number in the table on the next page.

	Webpage	Excel	PDF
	Membership		
1	Members List (addresses)	✓	✓
	Members List (email addresses)	✓	
	Addresses Export (addresses)	✓	
	Addresses Export (TAM list)	✓	
	Addresses Export (labels)		✓
	Membership Cards		✓
	Statistics		✓
	Groups		
4	Groups List	✓	
5	Group Record: Members	✓	✓
9	Calendar		✓
	Finance		
	Ledger (by account)	✓	✓
	Ledger (by category)	✓	✓
	Ledger (by group)	✓	✓
	Groups statement (with or without transactions)	✓	
	Gift Aid declaration	✓	
	Financial statement	✓	✓

The table below lists the Excel worksheets available from the **Data Export and backup** page (see [9.5](#)).

When the **Excel** radio button is selected, the sheets shown in the 2nd column may be generated in one multi-tab Excel file by selecting **Backup all data**. Alternatively, smaller sets of related sheets may be generated by selecting one of the direct menu picks shown in the 3rd column.

Menu picks for generating the individual worksheets may be displayed by first selecting the **CSV format** radio button.

	'Backup all data' menu pick	Other picks from the 'Data Export & Backup' page
	Membership	
1	Members & addresses	Members & addresses
	Finance	
2	Finance ledger	Finance ledger with detail
3	Finance ledger details	
	Groups	
4	Groups	Groups with members, venues & faculties
5	Group members	
6	Venues	
7	Faculties	
8	Group ledgers	
9	Calendar	Calendar
	Set-up	
10	System users	System users, roles & privileges
11	Roles	
12	Privileges	
13	U3A offices	U3A offices
14	Site settings 1	Site settings & set up
15	Site settings 2	
16	Finance accounts	
17	Finance categories	
18	Membership classes	
19	Membership fees	
20	Membership statuses	
21	Polls	
22	Poll assignments	
23	System messages	

Appendix C: Reference Documents

The following documents, some of which are referenced in this user guide, provide additional information about Beacon and related topics. The documents will be available soon on the **Beacon for U3A's** website, which is currently undergoing a rebuild.

Ref.	Title	Description
[1]	A U3A's Beacon Migration Journey	The ten-step guide to 'going-live'
[2]	Your Beacon Migration Journey Record	A sheet to record your U3A's progress towards implementing Beacon
[3]	Beacon Setup Considerations For U3As	Guidance about the configuration settings to be included when completing the data preparation workbook after you have applied to use Beacon.
[4]	Beacon Data Prep Guide	A guide to preparing your Beacon migration data
[5]	Beacon Data Prep Template	An Excel file to be populated with your Beacon migration data
[6]	Terms And Conditions Of Use For The Beacon System	T&Cs' that all Beacon U3As have to agree to these before migration
[7]	Beacon Functions	Description of the range of features within the Beacon system which can be enabled or disabled for a given U3A
[8]	Members And Partners	Description of the two ways of recording that two members share an address and can be treated as partners. Extracts from this document are included in Appendix D.
[9]	Financial Transactions In Beacon	Description of how Beacon handles financial transactions from a user viewpoint and some software details as a guide to software developers. Extracts from this document are included in Appendix E.
[10]	Beacon Online Transactions	How to allow Members to use PayPal's Services to make payments to a U3A for new membership and renewal fees using either a credit or debit card or a PayPal account.

Appendix D: Members and Partners

The following text is based on information in the document *Members and Partners, v3 [8]*.

Beacon has two ways of recording that two members share an address and can be treated as partners.

- The first way is that each member does “share address with” the other (as shown on their Member Record). They share a single Address Record in the database.

It doesn't matter if some other member(s) happen to have an identical address, you can only “share address with” one other member, and they “share address with” you. Beacon often refers to such members as partners.

Note: It is true that if you try very hard you can get A to share address with B and B to share address with C a third person, and so on but that is only because Beacon doesn't trap that error.

- The second way is that some membership classes are a “sharing class”. This has nothing to do with whether the word Joint appears in the class name (though most U3As do use those names for the classes) but simply whether the box “1 of 2 people at the same address” has been ticked.

IMPORTANT

Beacon does not check if a member who is in a “sharing class” does “share address with” another member, nor does it offer to put members who “share address with” into “sharing classes”. So it is possible for one or both of partner members not to be in a “sharing” class.

It is important that you do set “share address with” as this is the way that Beacon identifies that they only need one a copy of TAM between the two members, and similarly with the printing of address labels.

How does all this affect paying subscriptions and qualifying for gift aid?

Does it differ whether the payment is done through the Members Portal or via the Add New Member webpage?

In principle there is no difference between a member joining online or being added by the Membership Secretary, but different software is involved and some cases were considered too complex to handle in the online Portal.

Renewing

At renewal, a member with a partner can either pay for only themselves or for themselves and their partner. Remember that “partner” means “share address with”. Beacon will ask if it is OK that the partner is in a different class, but that is allowed.

If paying for both the fee is the sum of the two fees appropriate to the class of member and partner.

If an over-payment is made, the excess is treated as a donation, as this is the most common reason for an over-payment. Over-payments cannot happen with PayPal.

Joining via the Add Member page

A new member may only join into a shared class if they “share address with” either a second new member or an existing member. If the new member is joining at the same time as the existing member is renewing, a precise procedure must be followed to get the right payments recorded. If you have Joint Membership or other “sharing classes”:-

1. The wise first step is to go the Member Record for the existing member and change their class to the appropriate sharing class. The process is possible but more tricky if you omit this step. Either way, **do not go to the Renewals page.**
2. Go to the **Add Member** page, enter the new member details and on the “share address with” line select their partner from the drop-down list of Current members. When you select one, a

tick box appears to the right of their name and the words “renew at £xx” where xx is their renewal fee.

3. Tick the box. This will probably be for them as an individual member, so if you have lower fees for Joint membership you need to change their membership class, using the following steps.
 - a) Do a Ctrl+click on the grey box with three dots next to the partner’s name – this will open the partner’s **Member Record** in a new tab without losing the data already added for the new member.
 - b) Change the existing member’s class and press **Save** to close that tab and return to the **Add New Member** page (which still shows the wrong fee).
 - c) At this point, you may be wishing you had changed the partner’s membership class first, but luckily there’s a trick. Temporarily, choose a different member as the partner and then change it back again. Now the renew fee for the partner shows the amount for their new membership class. You can now complete the form.

Joining via the Members Portal

Joining online as a partner of an existing member is not currently supported by Beacon. If a new member attempts to select a “sharing class” a warning message is displayed; *“Please contact the membership secretary if your partner is an existing member”*.

It is anticipated that a future system upgrade will enable new members with partners that are already members to join online.

Gift Aid

Provided a member says that they are eligible for Gift Aid, and the U3A has enabled Gift Aid, Beacon will compute the amount of a subscription that is eligible for Gift Aid. The computation rules are:

- a) The member’s subscription fee is included.
- b) Any over-payment is treated as a donation and is included.
- c) The partner’s subscription is included only if the member’s class is a “sharing class”.

Beacon applies the eligibility rules strictly, even if they do not seem to be in the spirit of Gift Aid. In particular if a payment is made by a member for their partner, it is only the member’s eligibility that is checked, **not that of their partner**. Thus if only one of two partner member is eligible for Gift Aid, the payment must be made by that partner (using that row on the Membership Renewals page).

Beacon checks the eligibility for Gift Aid at the time that the Subscription Transaction is created by seeing if there is a non-null date in the “Gift Aid from” box, or for a new member if there is a tick in the Gift Aid eligible box.

IMPORTANT

Therefore, if a member stops being eligible for Gift Aid, the “Gift Aid from” box on the Member Record must be blanked out **BEFORE** processing the renewal payment. Doing this does not affect the Gift Aid eligibility of Subscription Transactions already in the system.

With suitable privileges, a user can edit the Subscription Transaction (or any other financial transaction), changing the member and amount eligible for Gift Aid, **PROVIDED** that this Gift Aid has not been marked as already claimed. This is totally at the discretion of the user and they are responsible for the validity of any amounts claimed. No checks are made by Beacon.

Appendix E: Financial Transactions

The following text is based on information in the document *Financial Transactions in Beacon, v1 [9]*.

It describes how Beacon handles financial transactions from a user viewpoint.

The word “should” means that users must use the system as described, even though the current version of the software may not enforce what has been stated. Over time Beacon may be modified to enforce such rules.

Financial years

Each U3A can define when its financial year starts, it must be the first of a month. Beacon uses this to define each financial year and names each financial year by the calendar year at the start of the financial year. For example if a U3A starts its financial year on 1st April, then the Financial year which runs from 1 April 2015 to 31 March 2016 is known as “2015” by the software in Beacon.

The term year in the following text refers to financial years, not calendar years. The term “**this year**” is the year containing today’s date, the term “**last year**” refers to the year before this year, and “**earlier years**” are the years before last year. Continuing the previous example, on 12th February 2017, this year is the period 1 April 2016 to 31 March 2017 and it is the year “2016”. Last year is the period 1 April 2015 to 31 March 2016.

Data for this year and last year should be editable in Beacon, but all “earlier years” should be considered closed, and no transactions for such dates should be added/changed/deleted. Users can view and download data for earlier years for historical records. There may be a future function of Beacon to allow a user to delete financial data for years more than 7 years ago.

Transactions

Beacon supports each U3A having multiple accounts each of which can contain transactions. Each transaction belongs to one account and has a date, and that date defines which year it belongs to. The amount of a transaction is positive for amounts going into the account and negative for amounts going out of the account.

Transactions are normally dated with the date on which they were created, but this and most other details about a transaction can be edited by a user, including setting the date of the transaction in the future. Each transaction has a transaction number (unique within that U3A’s financial records) used for display but for software purpose’ the transaction has a “**tkey**” which is a unique identifier in the database. The field Payee is used to refer to where the money is from/to regardless of whether it is incoming or outgoing transaction.

A transaction may be marked “Cleared” with the date on which the transaction was deemed cleared. The transaction is not cleared if the cleared date is NULL in the database. The purpose of this mark is to match transactions in an account in Beacon with records in an external system, e.g. to mark that the transaction appears on a bank statement for that account. This is described in detail in the section on Reconciliation.

It should not be possible to edit/delete cleared transactions, except to mark them uncleared if they have been cleared in error.

There are two special types of transactions, **Transfers** and **Brought Forward**.

Transfers

These are used to record moving money from one account to another and are represented by a pair of transactions, one in each account. Each transaction has a “**transfer_tkey**” which holds the tkey of its paired transaction in the other account. Here is an example of such a pair of transactions:

tkey	t_date	account	amount	transfer_tkey	payee
1234567	2016-08-28	current	-2000	1234568	to savings
1234568	2016-08-28	savings	+2000	1234567	from current

Transfers can be edited, and the associated transactions are modified in the database as a pair.

Brought forward (B/F)

These are special Transaction Records in the database, always dated the first day of the year in which they belong, and represent the amount brought forward in that account from the previous year.

There should be one B/F record for each active account for each year, except possibly for the year with the earliest transactions, or for years before the U3A started to use Beacon.

For each active account, B/F is automatically calculated at the start of the year, within the rollover function. Note that the rollover function does various jobs and runs once a day, currently during the first log-in of a user for that U3A.

The B/F amount is the sum of the amounts of all the transactions in the previous year, including the B/F record for the start of the previous year.

There may be changes to the previous year, either because some payments are entered into Beacon late or because errors need to be corrected. Beacon does NOT automatically recalculate this year's B/F record when changes are made to last year's transactions for an account. Instead, a user may press **Update B/F** for this year's B/F record. The B/F record for last year cannot be updated, as earlier years are considered closed.

It is therefore important that the user does update this year's B/F before the end of the financial year if changes have been made to last year's data.

If, due either to a user's oversight or to a bug in Beacon, the B/F for this year is incorrect even after having been updated, the user should enter an adjustment transaction with some date in last year.

The software records B/F transactions in an ad-hoc way, by setting transfer_key to -200 which is a non-null invalid value. This leads to some unexpectedly complex SQL queries.

It is not possible for a user to modify a B/F record manually, except by use of the Update B/F button.

Batches

A user may group a number of un-cleared transactions within a single account into a batch, and a transaction can belong to at most one batch. Batches are principally to aid a treasurer in the reconciliation of an account in Beacon with an external account. Doubtless, some smart treasurers will use batches for other purposes, but their main role is in reconciliation and marking transactions as Cleared.

It should therefore not be possible to edit/delete a transaction which is in a batch, except to remove it from an un-cleared batch. All the transactions in a batch should be cleared/un-cleared together. This is complicated to ensure, as the transaction database record does not contain an explicit reference to the batch, and a batch is not represented by a single record in the database. There is currently no explicit mechanism within Beacon to un-clear a batch of transactions, nor to edit which transactions belong to a batch.

The underlying transactions making up the credit batch appear in the ledger, rather than the credit batch as a single entry. There are no details of credit batches available in the data export and backup downloads.

Reconciliation

The Reconciliation page for an account allows the user to match the account's transactions, or batches of transactions, with corresponding entries in a bank statement for that account, marking matching transactions as **Cleared**.

After entering the date and closing balance of the bank statement, the un-cleared transactions, and batches, are listed and the balance mismatch shown. The user can mark transactions as cleared and the final mismatch will be displayed. Mismatch will not be zero if banking transactions have not yet been recorded in Beacon and vice versa.

Revision History

Rev.	Date	Section	Changes
9	Feb 2016	4.7 4.10	Minor update to text <i>Emails sent through Beacon</i> section added
10.1	Mar 2017	All	General update
11	Dec 2017	All	General update of whole document. <i>Email & Letters</i> moved to chapter 6 Appendices B to E added. Cross reference links added.