

u3a Beacon

Beacon

– so you want to know more?

Consider these questions

Where is all your u3a's information kept?

Is it readily and widely available to use?

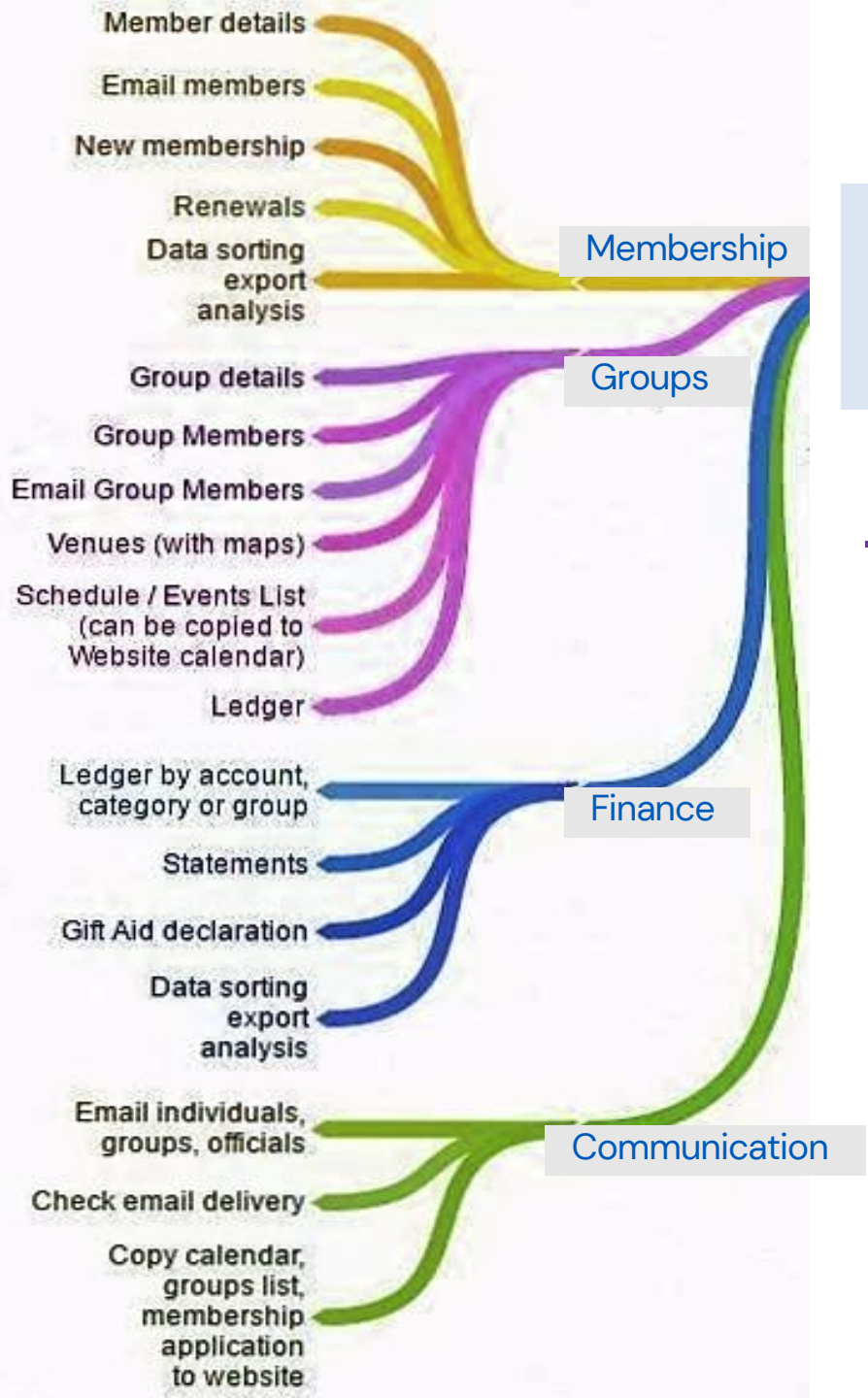
Are your roles easy to hand over?

Does everything comply with GDPR?

What if ...

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





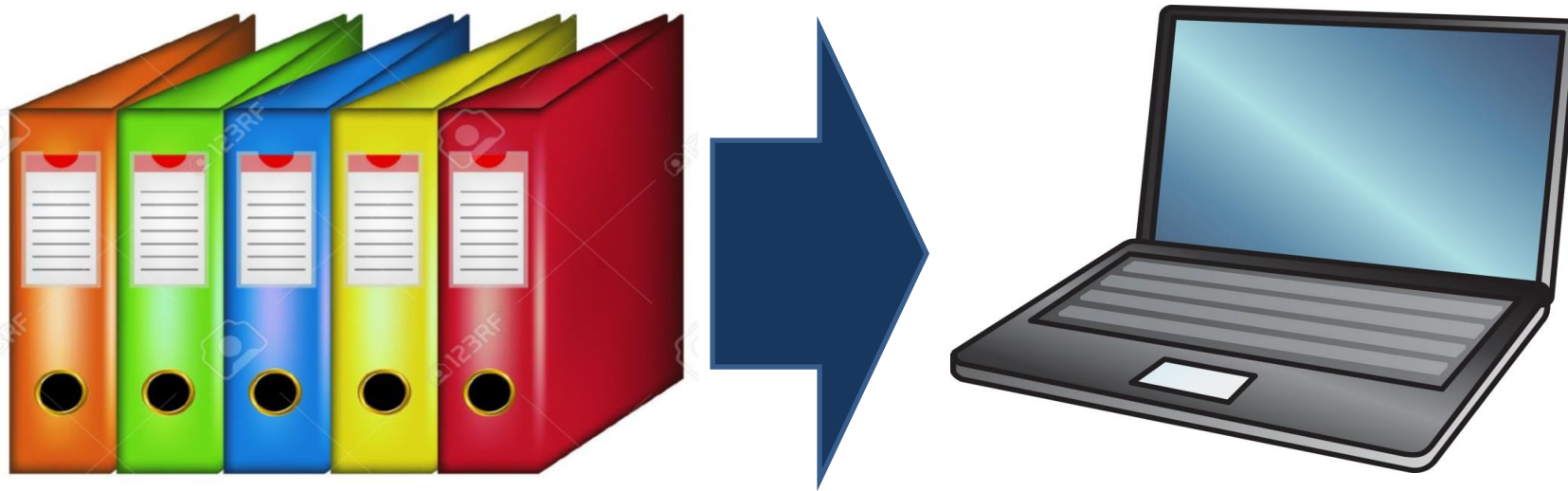
Beacon

- can do *all of this* for you.

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

So – what is Beacon?

- A website membership management system



- You will need a computer and internet access

What else would you need?

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



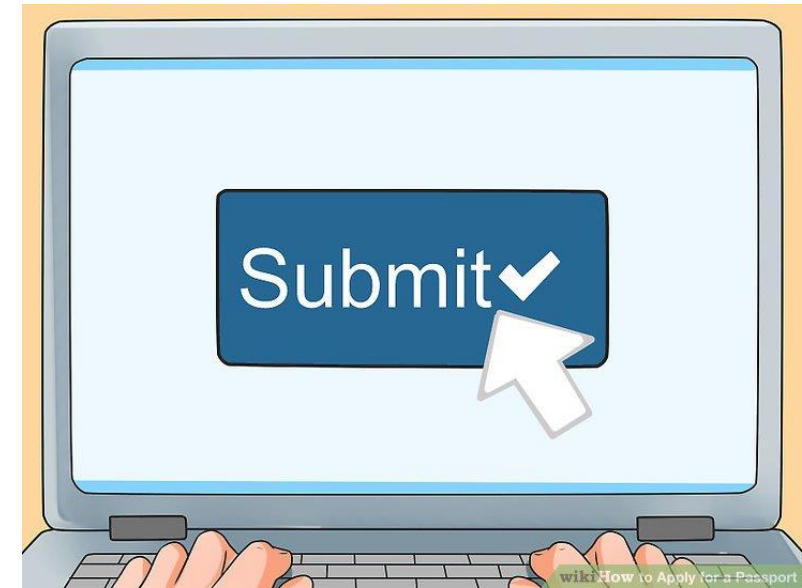
Benefits of Beacon

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



Anything special to do?

- If you decide to adopt Beacon your u3a will need to sign the Beacon Site Licence Form
- Complete an application form
- These are online
- This allows us to give you access to the software



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

u3a
Beacon

Administration

u3a

Username

Password

Passwords are case sensitive

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

Admin has to be able to see everything.

u3a AA Demo24 JH
Beacon

Administration

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

Membership	Groups	Finance	Misc	Set up
Members	Groups	Ledger (by account)	Audit log	System users
Add new member	Venues	Ledger (by category)	Gift aid log	Roles and privileges
Membership renewals	Faculties	Ledger (by group)	u3a Officers	System settings
Recent members	Calendar	Add transaction	Public links	System messages
Non-renewals		Transfer money	Data export & backup	Finance accounts
Membership cards		Credit batches	E-mail delivery	Finance categories
Addresses export		Reconcile account	E-mail unblocker	Membership classes
Statistics		Financial statement	Personal preferences	Member statuses
		Groups statement		Poll
		Gift Aid declaration		

[u3a Beacon Users' Forum](#) [Beacon User Guide](#) [Beacon Website](#)

Public website links [Join AA Demo24 JH u3a now!](#) [Members Portal](#) [Public groups list](#) [Public calendar](#)



What the membership secretary can see.

The screenshot shows the u3a Beacon Administration interface for AA Demo24 JH. The user is logged in as Jill Membership. The interface is divided into several sections: Membership, Groups, Finance, Misc, and Set up. The Membership section includes links for Members, Add new member, Membership renewals, Recent members, Non-renewals, Membership cards, Addresses export, and Statistics. The Groups section is currently empty. The Finance section is also empty. The Misc section includes Personal preferences. The Set up section includes Membership classes, Member statuses, and Poll. At the bottom, there are links for u3a Beacon Users' Forum, Beacon User Guide, and Beacon Website. A public website links section at the very bottom includes links for Join AA Demo24 JH u3a now!, Members Portal, Public groups list, and Public calendar.

u3a Beacon
AA Demo24 JH

Administration
You are logged in as Jill Membership [Log Out](#)

Membership	Groups	Finance	Misc	Set up
Members			Personal preferences	Membership classes
Add new member				Member statuses
Membership renewals				Poll
Recent members				
Non-renewals				
Membership cards				
Addresses export				
Statistics				

[u3a Beacon Users' Forum](#) [Beacon User Guide](#) [Beacon Website](#)

Public website links [Join AA Demo24 JH u3a now!](#) [Members Portal](#) [Public groups list](#) [Public calendar](#)

Beacon has a permission system that lets you limit the access of each user depending on what they need to fulfil their role.

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

Home - [Add New Member](#)

Members

Quick Find Search include criteria below

Status: Current Deceased Lapsed Resigned

Poll - any or none - Negate poll Class - any - Payment method - any -

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

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

Select	No	Name	Address	Telephone	Mobile	Class	Status
▲ ▼		A					
<input type="checkbox"/>	1002	Patricia Abrahams	15 Some Street, Demoton Village, DM13 6GG		0707 456 1005	Individual	Current
<input type="checkbox"/>	1055	Mary Accountant	27 Valley Lane, Lower Demoton, DM18 9MM	0123 456 1056	0707 456 1056	Individual	Current
<input type="checkbox"/>	1054	Jane Administrator	U3A High Street, Demoton, DM12 7RA			Individual	Current
<input type="checkbox"/>	1001	Isaac Asimov	72 Toning Ave, Demoton, DM5 4TS	0123 456 1004	0707 456 1004	Individual	Current
▲ ▼		B					
<input type="checkbox"/>	1005	David Barrett Browning	27 Kirkgate, North Demoton, DM9 2ZZ	0123 456 1029	0707 456 1030	Associate Joint	Current
<input type="checkbox"/>	1004	Elizabeth Barrett Browning	27 Kirkgate, North Demoton, DM9 2ZZ	0123 456 1029	0707 456 1029	Associate Joint	Current

What the Groups Coordinator can see

The GC can see all the groups: where and when they meet, the contact, numbers in each group, spaces and a waiting list.

Home - Add New Group

Groups

Faculty Show active only

Operations at bottom of page

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

Select	Group	Active	When	Where	Leaders	Members	Max	Waiting
	A							
<input type="checkbox"/>	Art Appreciation	Y	3rd Thursday at 1:00pm	The Feelgood Centre	Isaac Asimov	14	12	2
<input type="checkbox"/>					Walter Scott			
	B							
<input type="checkbox"/>	Bridge	Y	Fortnightly on Wednesdays at 2:00pm	Private House	David Barrett Browning	1	12	
	C							
<input type="checkbox"/>	Coffee and Cake	Y	1st Thursday at 10:30am	Costa High St	Mary Hawthorn	1	10	
<input type="checkbox"/>	Computing For Beginners	Y	1st Weds and 3rd Thurs at midday	Library	Eric Morecombe	4	10	
	F							
<input type="checkbox"/>	Family History	Y	2nd and 4th Mondays at 2:00pm	The Feelgood Centre	Dot Cotton	3	8	
<input type="checkbox"/>	Folk Dancing	Y	Every Tuesday at 10:00am	St Saviours Hall	Percy Wainwright	1	24	
	M							
<input type="checkbox"/>	Map Reading	Y	2nd Wednesday at 9:00am	No Fixed Venue	Sylvia Tolkein	1	40	

What a group leader might see.

The screenshot displays the 'Administration' page of the U3a Beacon system. At the top, it indicates the user is logged in as 'John Hopkins' with a 'Log Out' link. Below this is a navigation menu with five main categories: Membership, Groups, Finance, Misc, and Set up. The 'Groups' category is expanded, showing sub-links for Groups, Venues, Faculties, and Calendar. Below the navigation menu, there are several links: 'U3A Beacon Users' Forum' and 'Beacon User's Guide'. A section titled 'Public website links' contains 'Join Demoton U3A now!', 'Members Portal', 'Public groups list', and 'Public calendar'. A 'Documents' section lists 'Demo Test Notes' and 'Beacon use application form'. A footer note says 'Hover mouse over captions for more information'.

Administration				
You are logged in as John Hopkins Log Out				
Membership	Groups	Finance	Misc	Set up
	Groups		Personal preferences	
	Venues			
	Faculties			
	Calendar			
U3A Beacon Users' Forum		Beacon User's Guide		
Public website links	Join Demoton U3A now!	Members Portal	Public groups list	Public calendar
Documents	Demo Test Notes	Beacon use application form		

Hover mouse over captions for more information

Every group has its own details page.

Group Record for Bee Keeping

[Details](#) [Schedule](#) [Members](#) [Ledger](#)

Group Details

Group	<input type="text" value="Bee Keeping"/>		
Faculty	<input style="width: 100px;" type="text" value="Walking & Outdoors"/>	Status <input style="width: 50px;" type="text" value="Active"/>	Max members <input style="width: 40px;" type="text" value="12"/> gkey: 6372
	<input checked="" type="checkbox"/> Allow members to join on-line <input type="checkbox"/> Enable waiting list <input checked="" type="checkbox"/> Notify leader of changes		
When	<input type="text" value="1st Monday at 2:00pm"/>		
Normal start time	<input style="width: 60px;" type="text" value="14:00"/>	End time <input style="width: 60px;" type="text" value="16:00"/>	Contact <input style="width: 120px;" type="text" value="Brian on 0123 555 2589"/>
Venue	<input style="width: 150px;" type="text" value="College"/>		
Information	<div style="border: 1px solid black; padding: 5px; min-height: 100px;">Starter kit can be borrowed</div>		
Notes	<input style="width: 100%;" type="text"/>		

Group record created 28 Feb 2019 16:52; last changed 28 Feb 2019 16:52

What the treasurer might see.

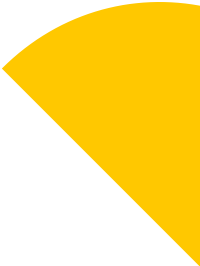
Administration
You are logged in as John Hopkins [Log Out](#)

Membership	Groups	Finance	Misc	Set up
		Ledger (by account)	Personal preferences	Finance accounts
		Ledger (by category)		Finance categories
		Ledger (by group)		
		Add transaction		
		Transfer money		
		Credit batches		
		Reconcile account		
		Financial statement		
		Groups statement		
		Gift Aid declaration		

[U3A Beacon Users' Forum](#) [Beacon User's Guide](#)

Public website links	Join Demoton U3A now!	Members Portal	Public groups list	Public calendar
Documents	Demo Test Notes	Beacon use application form		

Accounts and categories can be created locally by your u3a.



Current Account and Membership Account

Whether you choose to use the finance module or not, Beacon will automatically record all subscriptions as they are paid.
 You can create a Membership account solely for the subscriptions.

[Home](#) - [Ledger by category](#) - [Reconcile](#) - [Add Batch](#) - [Add Transaction](#) - [Transfer money](#)

Ledger - by account

Account Current Year 2024 1 Jan 2024 - 31 Dec 2024 Update B/F

Transaction	Date ▲	Batch No	Batch Ref	Payee/Payer	Mem No	Mem No 2	Detail	Payment Ref	Method	In	Out	Balance	Cleared
131	1 Jan 2024						Brought forward			£1,036.00		£1,036.00	31 Jan 2024
76	1 Jan 2024			Transfer subs to Current			Transfer subs to Current		BACS	£18.00		£1,054.00	
82	1 Jan 2024			Transfer subs to Current			Transfer subs to Current		BACS	£34.00		£1,088.00	
130	1 Jan 2024			Year end				Demo for De,oton 24	BACS	£1,072.00		£2,160.00	
96	4 Jan 2024			Peter Scott	1057		Folk Dancing 4-2-22		Cash	£12.00		£2,172.00	
97	4 Jan 2024			Peter Scott	1057		Folk Dancing 4-3-22		Cash	£15.00		£2,187.00	
99	5 Jan 2024			Sandra Cotton			Reimbursement for cost of refreshments 2020		Cheque		£120.00	£2,067.00	
103	7 Jan 2024			Peter Scott	1057		Folk Dancing 7-1-22		Cash	£10.00		£2,077.00	
106	11 Jan 2024			TATTL			Beacon licence for 55 members		BACS		£55.00	£2,022.00	
107	14 Jan 2024			TATTL			Beacon licence for 55 members		BACS		£55.00	£1,967.00	
108	14 Jan 2024			TATTL			TAM magazine distribution costs for 40 members		BACS		£140.00	£1,827.00	
110	15 Jan 2024			St Saviours Church			Folk Dancing 1-4-22		Cash		£12.00	£1,815.00	
116	18 Jan 2024			St Saviours Church			Folk Dancing 4-2-22		Cash		£12.00	£1,803.00	
117	18 Jan 2024			St Saviours Church			Folk Dancing 4-3-22		Cash		£12.00	£1,791.00	
121	21 Jan 2024			St Saviours Church			Folk Dancing 7-1-22		Cash		£12.00	£1,779.00	
123	24 Jan 2024			Jill Membership			4 quarterly newsletters to 10 non-email members		Cheque		£72.82	£1,706.18	
124	24 Jan 2024			TATTL			TAT membership fee for 55 members		BACS		£192.50	£1,513.68	
132	31 Jan 2024			Alfred Ingram	1020		Membership		BACS	£10.00		£1,523.68	
133	31 Jan 2024			Margaret Wales	1046		Membership		BACS	£8.00		£1,531.68	
135	19 Feb 2024			John Hopkins	1067		New membership		BACS	£10.00		£1,541.68	
136	28 Apr 2024			Joan Brown			Payment Hall Hire initial meeting possible Singing	Singing Group Trial	BACS	£28.67		£1,570.35	
137	28 Apr 2024			Methodist Hall			Hall Hire	Joan Brown	BACS		£28.67	£1,541.68	
138	6 May 2024			Martin Oaklee	1068		New membership		BACS	£10.00		£1,551.68	
139	16 Aug 2024			Michael Stone	1069		New membership		BACS	£10.00		£1,561.68	

[Download Excel](#) [Download PDF](#)

Transactions

All transactions have their own individual record.

Transaction

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

From Amount £

Date

Payment Method Cheque No

Detail

Account Cleared

Remarks

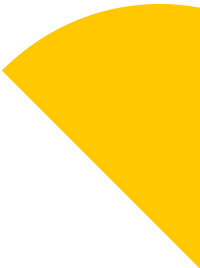
Associate transaction with

Members

Group

Categories

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



Finance

- It is a basic in and out record.
- Most u3as start from scratch in Beacon
- Finance and membership years are set to match your existing u3a years.
- Create your own accounts
- Do Gift Aid declarations
- Create end-of-year statements
- It is easy to audit



E-mails

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

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

Home

Send E-mail

From: John Hopkins <migration3@u3abeacon.org.uk>

To: Isaac Asimov <alan.abbey@demoton.com>
 David Barrett Browning <david.barrett@demoton.com>
 Attila Theeman <attila.theeman@demoton.com>
 Sylvia Tolkein <sylvia.testlady@demoton.com>
 Percy Wainwright <percy.wainwright@demoton.com>
 Mike Young <mike.young@demoton.com>
 Simone de Beauvoir <robert.barron@demoton.com> 7 addressee/s

Tick to receive copy
 Super User: Show Master Messages

Load standard message:

Add Attachments:

Subject:

Edit Insert Format Table

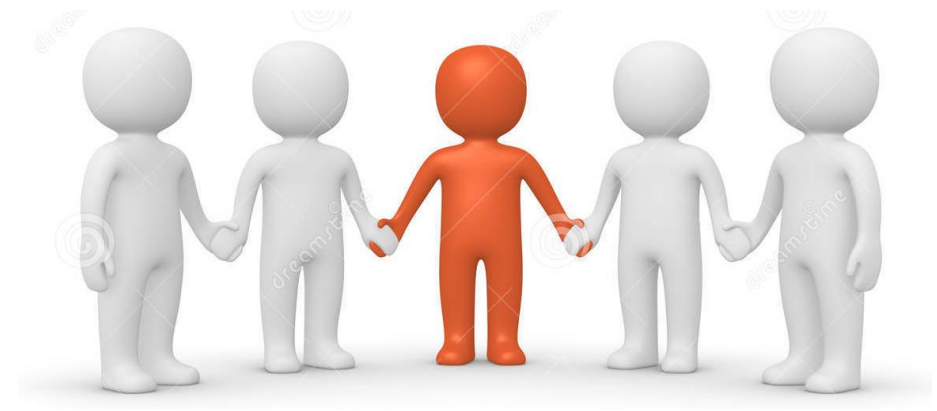
↶ ↷ Text **B** *I* ☰ ☱ ☲ ☳ ☴ ☵ ☶ ☷

Personalise this e-mail using tokens.
Click one to insert.

Member		Member's Partner
#TITLE	Mr, Ms etc.	#P
#FORENAME	e.g. William	#P
#SURNAME		#P
#FAM	familiar name e.g. Will	#P
#MEMNO	membership number	#P
#EMAIL		#P
#TELEPHONE		#P
#TELEPHONE4	last 4 digits	#P
#MOBILE		#P
#MOBILE4	last 4 digits	#P
#EMERGENCY	emergency contact	#P
#AFFILIATION	home u3a	#P
#RENEW	renewal date.	#P
#LASTRENEW	last renewal date	#P
#FEE	renewal fee	#P
#LASTFEE	last renewal fee	#P
#MEMCLASS	membership class	#P
#GIFTAID	gift aid date	#P

Polls – a useful filter.

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



Support Teams

- Supporters – someone assigned to your u3a to answer all your questions through to set-up and implementation.
- Migrators – helping you move your data to Beacon and making your live site.
- Trainers – putting on a series of specialist training courses.
- Ongoing help team



What can we do for you?

- Give you a demonstration
- Provide a supporter
- Provide your own Demo24 version of Beacon for you to learn on.
- Give you access via Demo24 and Beacon to the online User Guide



What else can we do for you?

- Our migration team can guide you through the data preparation and, if necessary, convert it for you.
- Software check that your data is ready for migration.
- Create your own u3a Beacon website



And afterwards?

- Detailed paperwork to help you set up.
- Your supporter still available for 3 months.
- Access to the Beacon Forum
- Access to the migrator for any technical issues.
- Online Help Desk



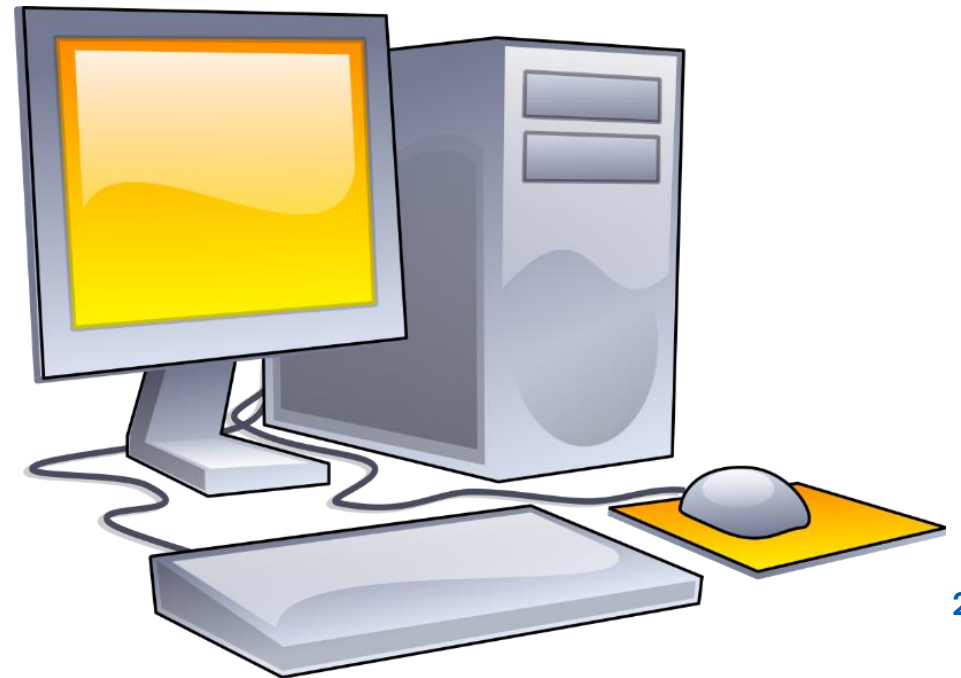
What does it cost?

- Beacon costs £1 per member per year
- This is calculated by the Trust on March 31st
- The price will not go up.
- The plan is that as more u3as use Beacon the price can come down.



Is your data safe?

- Security is our first responsibility.
- Your data is backed up professionally every day.
- Every u3a's data is encrypted.



Using Beacon

- If you would like to start the Beacon journey, please contact us at
- info@beacon.u3a.org.uk

Thank you for looking
and Good Luck!

