

Beacon functions

This document describes the range of features within the Beacon system. The system is highly customisable to the needs of each U3A, and many of the features described can be enabled or disabled for a given U3A.

1 Membership

1.1 Storing members data

1.1.1 Data fields

Many fields are built-in, including name, address, phone number (mobile and/or home phone), email address, and ad-hoc notes. Up to four custom fields can be added. A U3A can add any number of custom “poll” fields. These are fields with only true/false values. For example: “Wants posted monthly newsletter.”

1.1.2 Sharing an address

A member can “share address with” one other member. Such members are described as “partners”.

1.1.3 Membership numbers

A membership number for each member is automatically assigned.

1.1.4 Membership status

Two status values: “Current” and “Lapsed” are built in and are used by various Beacon functions. In addition “Deceased” and “Resigned” are recommended, and other custom statuses can be added.

1.1.5 Membership classes

A U3A can define any number of membership classes in addition to the default class, “Individual”, each of which can have its own subscription rates. Classes are identified as either ‘single’ for single members or ‘family’ for one of two members who are partners. Such classes are often called Joint by the U3A, but the name does not matter to Beacon. **Note:** *Beacon does not enforce the rule that a member in a family class shares an address with another member nor do “partners” have to be in family classes. This can cause some confusion to users.*

1.1.6 Editing membership data

An authorised user can edit any member’s data. The online portal (see section 5) allows members to update their own data.

1.2 Membership subscriptions

1.2.1 Subscription rates

These are defined for each membership class and have values for both “renew” and “join”. The joining rate may be fixed or vary by month of joining.

1.2.2 Membership year

Either fixed or rolling. In the first case all membership subscriptions fall due at the same date (the first day of the start month of a membership year). For rolling year, each member's subscription is due for renewal on the anniversary of their join date.

1.2.3 Advanced renewals or extended joining periods.

These two features permit members who renew / join in a defined period before the start of the next membership year to have their subscription run to the end of the following membership year.

Note: *These periods are defined in weeks not months.*

1.2.4 Entering renewals and join payments

An authorised user can record renewals / joins and the method used for payment. The system calculates the correct subscription fee, and expiry date. A finance transaction is created for each subscription payment and linked to the relevant one or two members. These payments are assigned to the finance category called "Subscriptions". Overpayment is permitted and such amounts are treated as "Donations".

1.2.5 Gift-aid

If the U3A has chosen to enable gift-aid recording, the system will record the amount claimable for gift-aid. There is a finance function to output all these amounts in the exact format required by HMRC.

1.2.6 Membership cards

Each renewing or joining member is marked as needing a membership card for that year. An authorised user can print some or all such cards at any time. The format is fixed and is credit card sized. They can be printed on to A4 sheets designed to hold 10 cards per sheet.

Blank or replacement cards can also be printed.

1.3 Output functions

Lists of members are shown on screen, and these lists can be filtered in various ways, including by Status, Class, Poll, with/without Email, Recently Joined, Renewals Due or Overdue.

All, or a selected subset, of the members on such lists can be selected for a variety of outputs:

1. Send email via the Beacon email system.
2. Create letter and download for printing.
3. Download email address list, for use with a third party email system such as MailChimp.
4. Print address labels for selected members (one label for a pair of members sharing an address).
5. Download current member data in the spreadsheet format required for the U3A magazine Third Age Matters.
6. Download member data as a spreadsheet or PDF file for use outside Beacon.

The way that Beacon creates and sends emails and letters is described in section 4.

1.4 Handling non-current members

When a member's subscription has expired, after some grace period they should no longer be regarded as Current members. Beacon does not do this automatically, but provides a simple function for an authorised user to change the status of all such members to Lapsed, or to send them a warning email or letter, as a preliminary step.

The data of non-current members is normally retained in the system and there is a function to remove this data for members who have not been current for 7 years or more, consistent with data protection policy guidelines.

2 Finance

2.1 Accounts

Beacon provides book-keeping facilities for multiple accounts held by a U3A. Accounting is done on a "cash" basis and there is no built-in support for accrual accounting.

Two default accounts are set up, a Current account and a PayPal account (if PayPal is enabled for the U3A). Any number of additional accounts can be created.

A U3A can define its financial year, which need not be the same as its membership year. The online ledgers show the amounts in/out for an account for any selected financial year.

2.2 Transactions

Subscription payments and PayPal payments are automatically entered into the correct account by the system, and are linked to the members to which they relate. Other financial transactions can be entered manually by an authorised user.

The transaction details identify the payer/payee, the method of payment, e.g. cash, cheque, BACS transfer, etc. and the date of payment, and allow a textual description to be entered.

Optionally, a transaction can be assigned to a U3A Group, to allow items relating to that group to be listed separately.

A transfer of money between two accounts is handled as a pair of linked transactions, one for each of the accounts involved.

In addition each U3A Group can maintain its own ledger, completely separate from the main accounts, to allow a group leader to record income and expenditure which they are managing separately.

2.3 Categories

Each U3A can define any number of finance "categories" which are used to define the type or income or expenditure. A transaction can be assigned to a single category, or can be split between two or more categories.

There are three built-in categories, Subscriptions, Donations, and PayPal Commission and automatically entered transactions are correctly apportioned to these categories.

2.4 Annual financial statement

This can be produced. It shows data in a similar format to a formal annual financial statement.

2.5 Other output

The system allows an authorised user to download data by account, category or group to either an Excel spreadsheet or as a PDF file for printing.

In addition the system can download spreadsheet of GiftAid amounts that have not been previously claimed, in the format that can easily be pasted into the current HMRC official format.

2.6 Reconciliation with an external bank statement

An often onerous task is to check the Beacon transactions with those on a bank statement, and to mark those transactions that appear on the bank statement as “cleared”. Beacon provides a webpage to facilitate this.

In addition, subscriptions paid by cash or cheque are often paid into a bank together and show on the bank statement as one item. Beacon allows such transactions to be grouped together as a batch which shows as a single item on the reconciliation page and which can be “cleared” together.

3 Groups

There are various functions to describe a U3A’s groups and which can be used by a group leader. Different U3As have varying terminology for “group” and “leader” and they can set up their own terms to be used by Beacon.

3.1 Group information

This includes when (day, frequency and normal start and end times), where (from a list of venues), contact info for enquiries, and a textual description about the group. For display purposes groups can be assigned to a U3A defined “Faculty” e.g. “Science and IT”.

3.2 Venue information

Venues can be stored for future use. Details can be generic e.g. “A home in MyVillage” or fully detailed so that a map location can be displayed. Optional details include phone number, email, website, and contact name.

3.3 Group events

Events may be entered for a group. These can either be one-off events or one or more series of regular events with defined start and end dates and a selected frequency. Venue (default is the group’s normal venue), topic and free text details can be added for each event.

3.4 Group members

One or more group leaders should be assigned to each group. Other U3A members can then be added as members of the group. Any user with the

correct privileges can do this, but Beacon is designed to allow group leaders to do this themselves. As an aid, members whose membership subscription has expired are shown in red, but they are not automatically removed from the list of group members.

If a group has specified a maximum number of members, if more members are assigned to the group, they are placed on a waiting list.

If given the appropriate Beacon privilege, the group leader can select the group's members, or any subset of them, and send them an email via Beacon's email system. Alternatively a spreadsheet with their details can be downloaded, for use outside Beacon

3.5 Group Ledger

Each group can choose to operate a Group Ledger. This is a basic facility to assist group leaders to account for monies paid and received. There is at present no connection between these ledgers and the main Treasurer's ledger.

4 Email

4.1 Creating emails (and letters)

The content and use of emails and letters is entirely up to the user and each email or letter sent can be customised to each recipient by the use of a variety of "Tokens", e.g. #SURNAME will be replaced by the member's surname. Examples of possible usage are:

Welcome message sent to a member when they join.

Renewal overdue message sent to members whose renewal is overdue.

Notice of the U3A's monthly meeting sent to all current members

Bad-email-address letter sent to members who have supplied an invalid email address.

4.2 Standard emails (or letters)

Each U3A can save any email or letter as a standard for use whenever needed.

4.3 Sending emails

The system uses an industry renowned supplier, SendGrid, to deliver emails. This enables the system to keep a record of delivery status, report bounces and spam reports back to the user and their U3A so that the issue can be dealt with. When multiple emails are sent, the email addresses of other recipients are not exposed.

4.4 Sending letters

The system will create a single-page PDF file with separate pages for each recipient.

(The system should also create a matching set of address labels, but it doesn't.)

5 Online portal and public access

Various Beacon webpages are accessible without being a Beacon registered “user”. Some of these pages are designed to be for public access and others restricted to members of a given U3A, “the members’ portal”. All these pages can therefore be linked to from a U3A’s own website, or could be sent as a web address by email.

5.1 Public access pages

The following three public pages can be chosen by a U3A to be publicly available:

- 1) List of Groups, with details on each group
- 2) Calendar of group events

Which information is made available is highly customisable.

3) Joining the U3A: allows a person to subscribe to the U3A, paying their joining subscription online by credit/debit card. This uses PayPal, and so the U3A must set up a PayPal account.

5.2 Members’ Portal

Because members are unlikely to want to remember a password, members log-in to the portal by entering their membership number and a variety of other details to confirm their identity.

Within the portal there are four pages which can be made available:

- 1) List of Groups, with details on each group
- 2) Calendar of group events

Which information is made available is customisable, separately from the public pages.

3) Change my details

4) Renew membership, allows a member to renew their membership, paying their joining subscription online by credit/debit card. This uses PayPal, and so the U3A must set up a PayPal account.

6 Users, Audit, and Security

6.1 Users

Each U3A can create a number of Beacon users, and define the role or roles that each user has. A U3A can create its own roles or use Beacon built-in roles. Each role has a set of fine-grained privileges, which describe which features of Beacon the role has access to, and whether that access is for viewing only, or for adding/editing/deleting/downloading data relating to that feature.

6.2 Audit

Every change to the database is recorded in an audit log, which can be viewed by an authorised user. The audit log also records each log-in and failed log-in attempt.

6.3 Security

Beacon has several layers of security built-in to protect the access to the system and to its data.

These include strong password for log-in, automatic timeout, data entry validation, database encryption.

To ensure data will still be available in the event of some catastrophic failure there is a daily system back-up and off-site data back-up.