



Lighthouse Guide 1: Getting Started

Welcome to Lighthouse! Lighthouse is the party's tool to help you manage your local party.

Within it, you'll find data on members, supporters and donors, as well as roles people hold in the party, financial contributions and a whole raft of other important information and useful processes.

This guide covers how to use the system, including what everything is and where to find it and a few more useful hints and tips.

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- [How to change your organisation's details](#) (p 18-19)
- How to manage your account (p x-x)

Permissions Required

	View	Edit	Create
View Dashboard	✓ (Dashboard)		
Change organisation details		✓ (Organisation)	

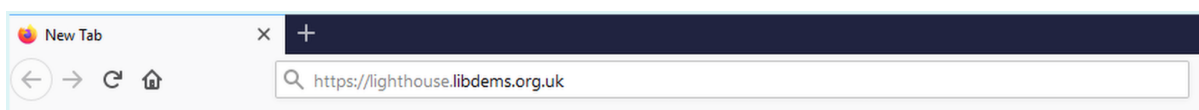
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How to log in to Lighthouse

Everything that we do in Lighthouse starts by being logged in! As data in Lighthouse needs to be kept secure, we use 2 factor authentication. This means the login process might be a bit longer than you're used to.

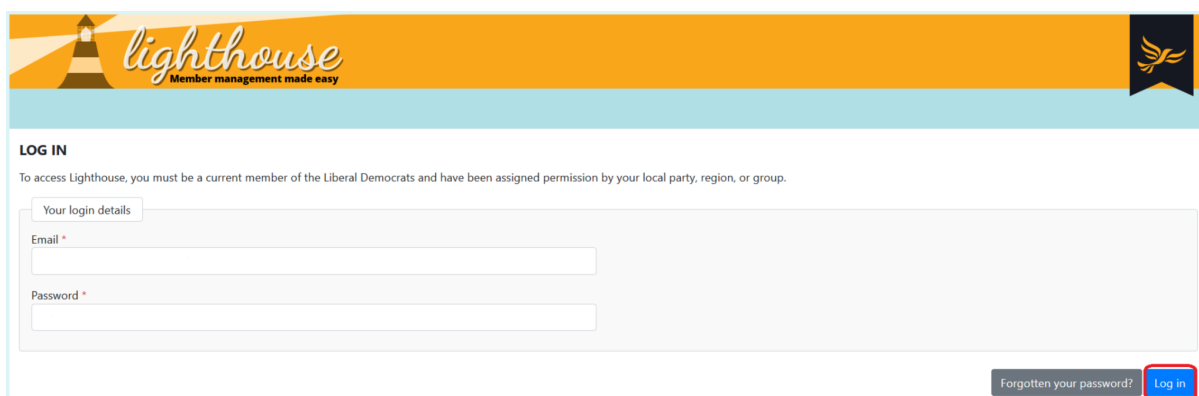
Step 1

Open your web browser. In the address bar at the top of the screen, enter the following URL, then press enter. - <http://lighthouse.libdems.org.uk/>



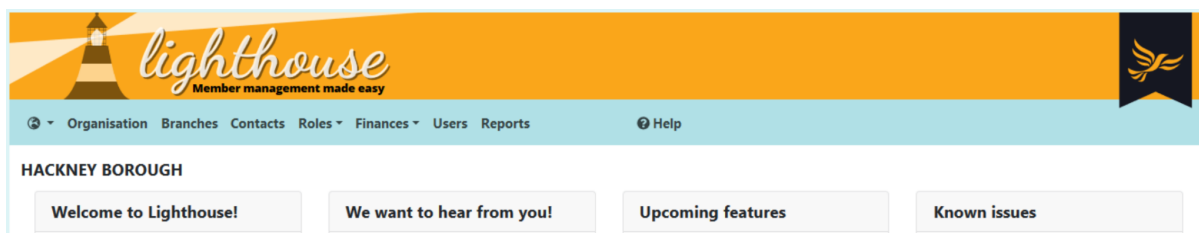
Step 2

You will be directed to the login page. Enter your email address and password, then click "Log in".



Step 3

You will be directed to the Dashboard page. Now you're ready to use Lighthouse!



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Navigating around Lighthouse

After logging into Lighthouse, you will see a variety of options in the blue menu bar at the top of the screen. These are tabs and sub-tabs.

Each Tab or Sub-tab contains a different type of information to the others. The access you have will depend on the user access that you've been given.

Switching Organisations

Data within Lighthouse is organised within organisations. These can be a local, regional or state party or even a party group. Organisations exist in a hierarchy, where organisations above you in a hierarchy can give your data, but you can't view theirs.

For example, if you're in a local party, you can see your data and your regional party can see your data, but you can't see regional data, or the data for other local parties in your region.

If you have access to more than one organisation you can switch between them quickly and easily by clicking on the globe icon in the top left of Lighthouse.

Step 1

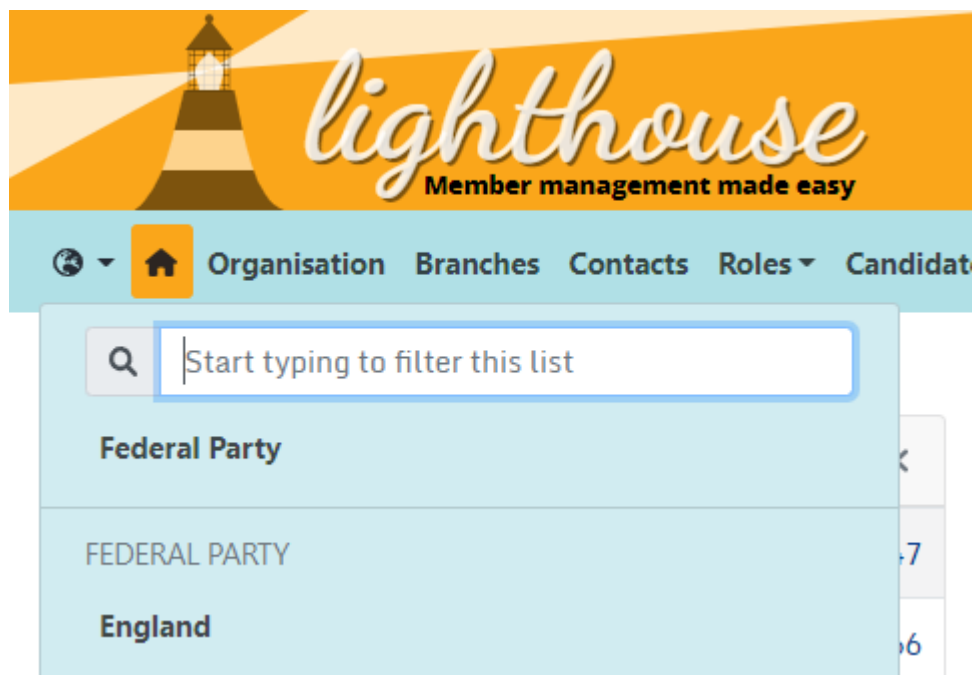
Click on the Globe icon in the top left of Lighthouse.



Step 2

Start typing the name of the organisation that you want to change to. When it appears, select the organisation from the drop-down.

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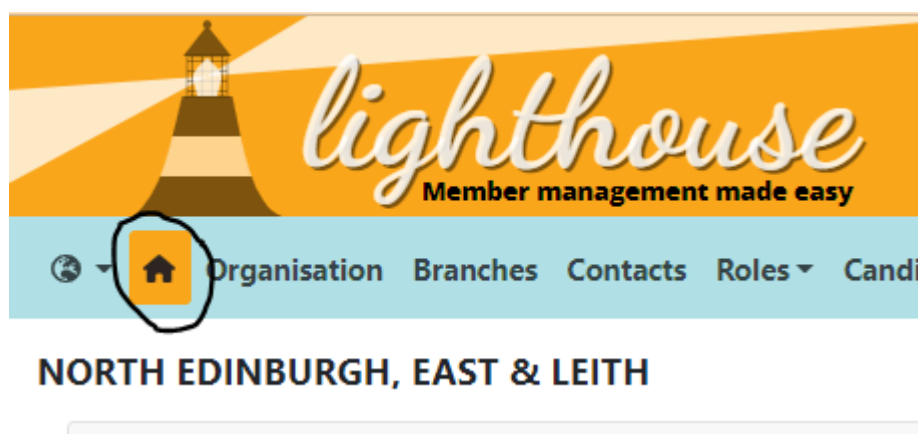


You'll then see the dashboard reload and you'll see the name of the organisation that you switched to appear in the top left of the Dashboard.

Home

Wherever you are in the system, you'll always have the home icon. Clicking this at any time will immediately bring you back to the Dashboard.

You can see the home icon in the screenshot below:



Tabs & Sub-tabs

Tabs and sub-tabs are how information is organised within an organisation. Each tab or sub-tab contains a specific type of information.

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A list of all tabs and sub-tabs can be found below, it also includes a list of all of the user permissions required to view that tab or sub-tab. You can find out more about user permissions [here](#).

Tab	Sub-Tab	What it contains	Permissions required
Dashboard	N/A	Statistics on how well your local party is doing	View Dashboard
Organisation	N/A	Information that HQ has about your organisation and its bank accounts	View Organisation View Banking
Branches	N/A	Information about branches and the members of those branches	View Branches
Contacts	N/A	Information about people in Lighthouse	View Contacts View Donations (for financial information)
Roles	Campaigners	Information on people who have signed up to party campaign information lists	View Roles
	Electoral	Information on elected representatives & agents	
	Federal Party	Information on roles created by the Federal Party	

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	Local Party	Information on roles created by the Local Party	
	System users	Information on who has access to party systems	
	Other	Any other party roles	
Candidates	Electoral Areas	Information on electoral roles that are in your organisation	View Candidates
	Elections	Information on elections being held in electoral areas in your organisation	
	Forms	Candidate application forms	
Finances	Donations	Information on donations being made to your organisation	View Donations
	Pledges	Information on donations you think might be made in the future	
	Loans	Information on loans made to your organisation and repayments on those loans	

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	Donation Returns	Your PPERA (or donation) returns	
	Membership Rebates	Information on payments to your organisation from HQ	
Training	Courses	Information on training courses your organisation or you can run	View Training
	Sessions	Information on sessions of training courses you can run	
	Attendances	Information on people attending those sessions	
	Accreditations	Information on people's accreditation to use party systems	
	Trainers	Information on who can provide training within your organisation	
Users	N/A	Information on users who have access to the system	
Reports	Reports	Custom filters that have been created for you to show specific types of	

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		data in the system	
	Demographics	Information on the demographic breakdown of your organisation versus the UK and local averages	
Tasks	Actions	Information on tasks you might want to take on as a volunteer	N/A
	Problems	Information on issues you've reported to HQ	N/A
Your name	N/A	Information about your membership and access	N/A
Help	N/A	All of the Lighthouse help documentation	N/A

List Views

Within a tab or sub-tab, the first page you come to will be the list-view page. This displays records in a list and gives you a brief overview of the information contained in the record.

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The screenshot shows the Lighthouse web application interface. At the top is a navigation bar with the Lighthouse logo and the tagline "Member management made easy". Below the navigation bar is a breadcrumb trail: "VIP > CONTACTS". A search bar contains the text "greg foster" and a search icon. Below the search bar is a table with the following columns: Title, First name, Last name, Membership, Branch, Member No, Since, Until, Address, Town, Postcode. The table contains one row for Greg Foster, with a red 'x' in the Membership column and "Non-Member VIP" below it. The Member No is 22031134743 and the Postcode is GB.

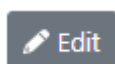
Record View

A record view then displays information about a specific record that you've accessed from a list view.

The screenshot shows the Record View for Greg Foster. The breadcrumb trail is "VIP > CONTACTS > GREG FOSTER". Below the breadcrumb trail is a row of action buttons: "Back to list", "Edit", "Copy address change URL to clipboard", "Copy demographic update URL to clipboard", "Report problem", "Add action", and "Mark deceased". Below the action buttons are three panels: "Personal details", "Contact details", and "Membership". The "Personal details" panel shows "Greg Foster" and "Created: 3 Mar 2022". The "Contact details" panel shows a list of contact preferences: "OK to contact" (checked), "Do not email" (unchecked), "Do not phone" (unchecked), "Do not send post" (unchecked), "Do not text" (unchecked), and "Do not fundraise" (unchecked). The "Membership" panel shows "Member status: Non-Member", "Local party: VIP", "Membership number: 22031134743", and "Ballots by: Post".

Action Button

Action buttons are found at the top of list and record views. As the name suggests, they let you do things.



Edit is an example of a very common action button, which allows you to make changes to a record (you'll need at least edit permissions to that tab or sub-tab to view this action button!).

Quick Link

Quick links are found on list views and within records. They allow you to quickly move around the system.

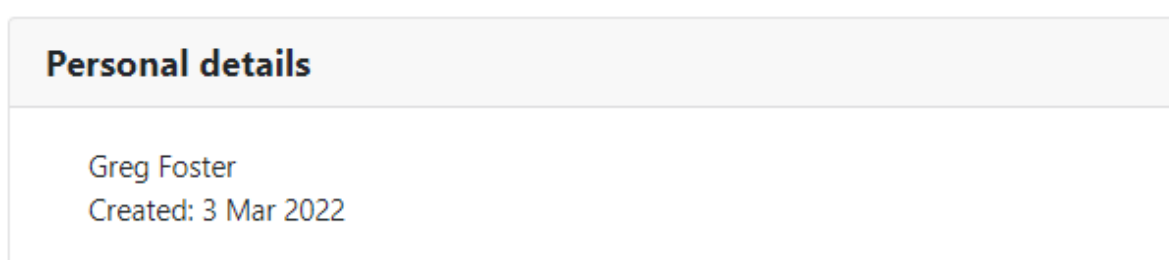
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The eye and pen icon above are examples of quick links. The eye takes you to a record view and the pen lets you edit the record.

Information Panel

Information panels are found within record views and help organise data relating to the record you're viewing.



Personal details is an example of an information panel. All information panels have a header which indicates what kind of data is stored there and then contains relevant information about the record.

How to use the Dashboard

The Dashboard gives you at-a-glance information about the health of your organisation, including key statistics, like how many members you have, graphs of performance over time, recent changes in the system and much more besides.

What each dashboard component means

There are a number of individual components to the dashboard and each one serves a specific function.

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The screenshot displays the Lighthouse software interface with a navigation bar at the top containing 'Organisation', 'Branches', 'Contacts', 'Roles', 'Finances', 'Users', 'Reports', and 'Help'. The main content area is titled 'LOCAL PARTY NAME' and contains several widgets:

- Welcome to Lighthouse!**: A text-based introduction explaining the system's purpose and providing a list of features like 'Manage membership', 'Manage local branches', and 'Record donations, loans and expenses'. It also includes a link to training resources.
- Totals**: A summary table showing key metrics such as 'Active members who have refused to ren', 'All current members', 'All current supporters', and 'All donations (last 90 days)'. It includes a scrollable list of 'Locally recruited members' for years 1, 2, and 3, and 'Members that need to renew'.
- Recent in and out**: A table tracking changes in membership categories (Mem, Sup, Lap, Res, D) over time, with entries for dates like 5 May, 4 May, 3 May, 2 May, 1 May, 30 Apr, 29 Apr, 7 days, 30 days, and 90 days.
- Moved recently**: A small table showing 'Moved in (last 90 days)' with a count of 9 and 'Moved out' with a count of 5.
- Day by day**: A line chart showing daily trends for 'New mem...', 'New supp...', and 'New dona...' from 10 Feb to 1 May.
- Contact history**: A line chart showing trends for 'Active me...', 'All curren...', and 'All curren...' from 10 Feb to 1 May.
- Donation history**: A line chart showing trends for 'All donations (last 90 days)' and 'Amount donated' from 10 Feb to 1 May.
- Known issues**: A text box providing instructions on how to report bugs and listing known issues such as 'Totals for amount donated and number of donations on contact pages are sometimes incorrect'.
- Upcoming features**: A text box listing features to be added, such as 'Customisable notifications about incoming and outgoing members' and 'A support request system'.

Here is an explanation of what information each of these components shows you.

Component	Explanation
Welcome to Lighthouse	Introduction to Lighthouse and links to useful Lighthouse guides. It will also tell you who the local administrators of the system are.

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Totals	Live counts of the current members, supporters, donations, locally recruited members and any other report where “Show total on dashboard” has been checked. Clicking on any of the numbers will open a filtered view of those people
Recent in and out	Daily counts of members and supporters joining or leaving your organisation, so you can understand what’s happening with your membership over time. Clicking on any of the numbers will open a filtered view of those people
Moved recently	Counts of how many members have moved into, out of, or within your organisation. Clicking on the blue links will take you to a list view with more details on movers.
Day by day	A graph showing numbers of new members, new supporters and amount donated each day, allowing you to track trends.
Contact History	A graph showing the total number of members and supporters each day as well as any metrics from other contacts where “show history on dashboard” is checked.
Donation History	A graph showing total numbers of donations and total amount donated each day and any metrics from other donation reports.
Known issues	A list of known technical issues with Lighthouse that the team are working to resolve and contact information to report other bugs and glitches
Upcoming features	A list of exciting new Lighthouse features that will be release in the near future
Recent changes	A summary of the number of contacts created, updated or moved within your local party today, yesterday and this week.

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How to customise your dashboard

On the dashboard page, you have the ability to completely customise what components are shown and what order they're in. To customise your dashboard, either log in to Lighthouse or click the home icon from anywhere in the system.

FEDERAL PARTY

Welcome to Lighthouse!

Lighthouse is our new online local party management tool for LPOs, replacing Salesforce for Local Parties.

You can currently use Lighthouse to:

- Manage membership
- Manage local branches
- Manage your local party
- Manage your local executive
- Record donations, loans and expenses
- Complete PPERA returns

You can find lots of training resources to help you get started at: <https://www.libdems.org.uk/lighthouse> — you can also find details here about how to book onto one of our training webinars.

As Lighthouse is a new system, we will be developing it further over the next few months to fix any final snags, as well as adding a range of helpful new features.

Totals

Active members who have refused to ren

All current members

All current supporters

All donations (last 90 days)

Amount donated

Locally recruited members, year 1

Locally recruited members, year 2

Locally recruited members, year 3

Members that need to renew

Recent in and out

	Mem	Sup	Lap	R
6 May	-	-	-	-
5 May	3	3	-	-
4 May	2	2	-	-
3 May	3	-	-	-
2 May	3	2	-	-
1 May	4	-	-2	-1
30 Apr	7	1	-1	-5
7 days	22	8	-3	-17
30 days	118	52	-18	-57
90 days	365	173	-1,868	-1,270

Moved recently

Moved in (last 90 days) 85

Moved out -

Moved within Federal Party 1,655

How to expand a dashboard component

To view a dashboard component in more detail, click the icon with two arrows in the top-left corner of the component. The component will expand to fill the screen. To shrink the component back down and view the rest of your dashboard, click the arrows icon again.

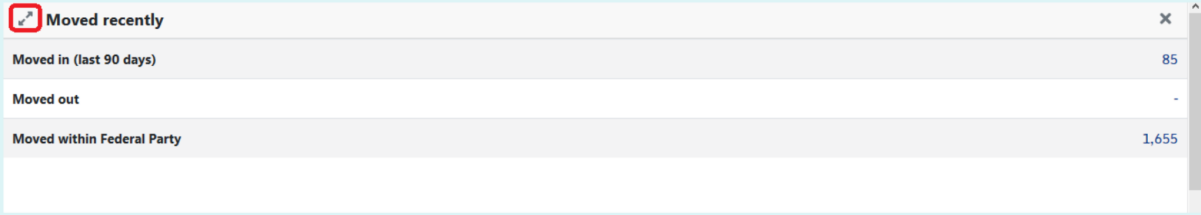
Moved recently

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Moved out -

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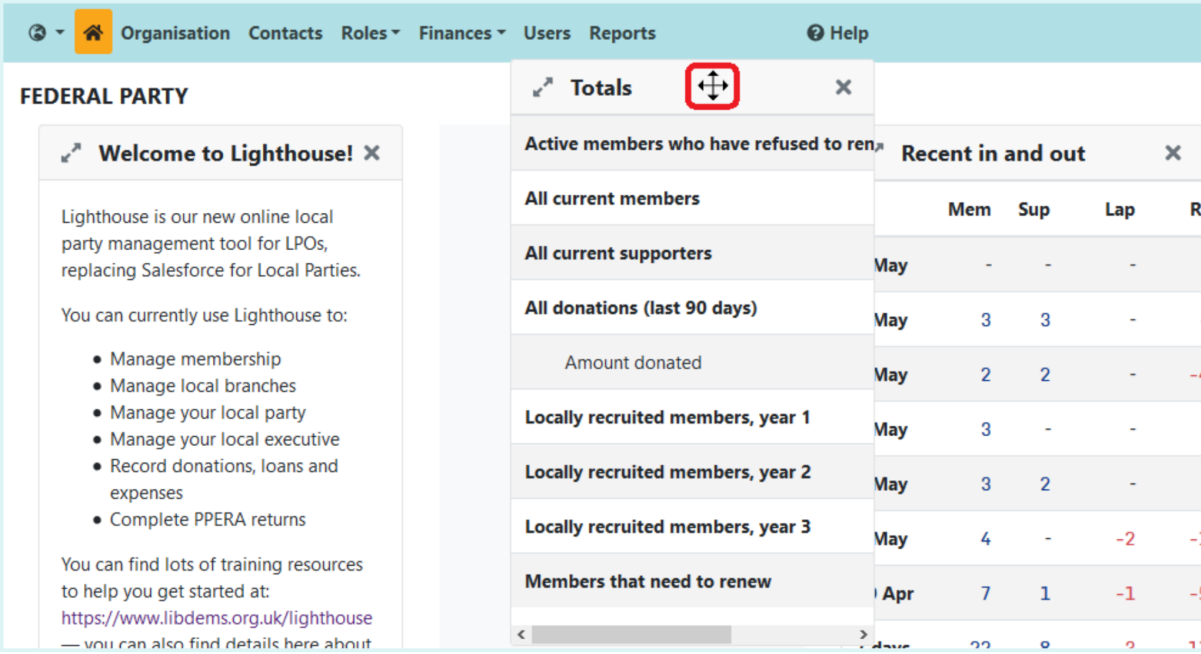
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Moved recently	
Moved in (last 90 days)	85
Moved out	-
Moved within Federal Party	1,655

How to rearrange your dashboard components

If you move your mouse over the title of a dashboard component, the cursor will change from a single arrow to a set of four arrows pointing away from each other. Once it has changed, click and drag the component around the dashboard. Once you have found a spot to move it to, release the click and the component will drop into its new location.



Organisation				
FEDERAL PARTY				
Welcome to Lighthouse!				
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You can currently use Lighthouse to:				
<ul style="list-style-type: none">• Manage membership• Manage local branches• Manage your local party• Manage your local executive• Record donations, loans and expenses• Complete PPERA returns				
You can find lots of training resources to help you get started at: https://www.libdems.org.uk/lighthouse				
— you can also find details here about				
Totals		Recent in and out		
Active members who have refused to renew		Mem	Sup	Lap
All current members				R
All current supporters	May	-	-	-
All donations (last 90 days)	May	3	3	-
Amount donated	May	2	2	-
Locally recruited members, year 1	May	3	-	-
Locally recruited members, year 2	May	3	2	-
Locally recruited members, year 3	May	4	-	-2
Members that need to renew	Apr	7	1	-1

How to add or remove dashboard components

By default, all available dashboard components will be visible when you first open your dashboard. To remove a component, click the x icon at the top right of the component, and it will disappear.

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FEDERAL PARTY

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3 May	3	-	-	-
2 May	3	2	-	-
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Moved in (last 90 days) 85

Moved out -

Moved within Federal Party 1,655

If you have removed dashboard components, you can add them back in by scrolling to the bottom of the page. You will reach an empty component with a “plus” icon in, as shown below. Click on the plus icon and a drop-down menu will appear, showing a list of available components which you can add to the dashboard. Choose one from this list and it will take the place of the empty component.

Totals

Active members who have refused to ren

All current members

All current supporters

All donations (last 90 days)

Amount donated

Locally recruited members, year 1

Locally recruited members, year 2

Locally recruited members, year 3

Members that need to renew

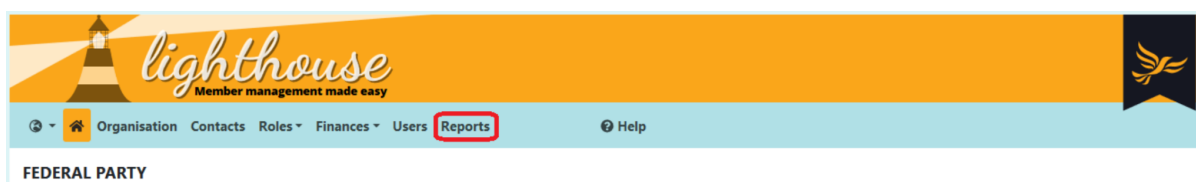
How to add reports to your dashboard

Please note that this guide covers the steps you need to follow to add data from an existing report to your dashboard. If you need help to create a report, [click here](#).

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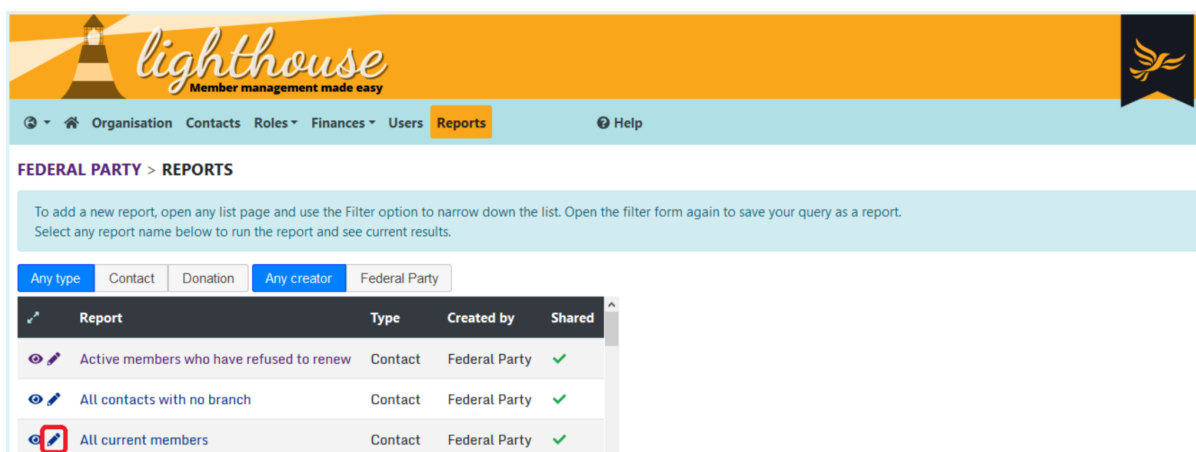
Step 1

Once logged in to Lighthouse, find the reports tab and click on it.



Step 2

The Reports page will now load, where you will see a list of all your standard reports as well as your saved custom reports. To get started, click the pencil icon next to a report to edit it.



Step 3

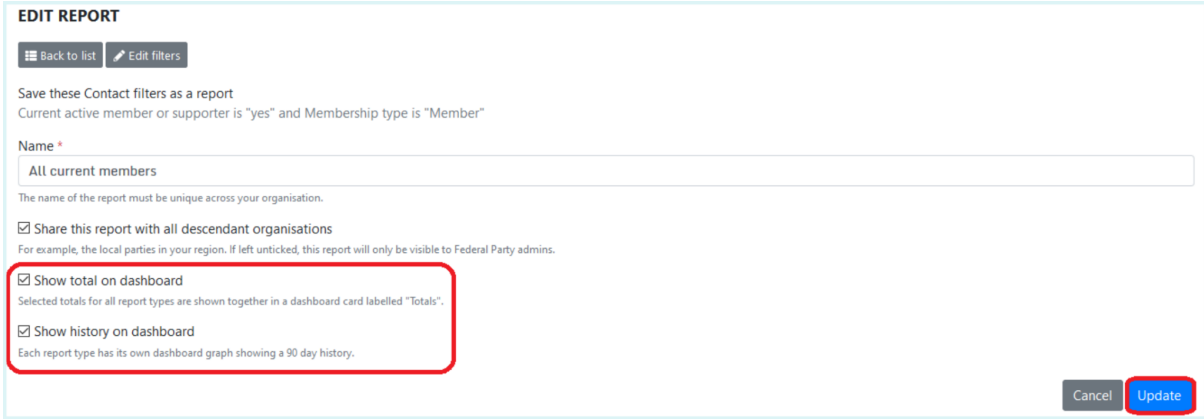
You will be directed to the Edit page for your chosen report. Here you will see options to edit your report filters and rename your report.

Further down the page, you will see three check-boxes, the second and third of which control whether the report is visible on the dashboard. Check either or both of them depending on how you would like to view the report on your dashboard:

- Show total on dashboard - adds metrics to the "Totals" dashboard component, which updates in real time. For example, you can have live counts of members, supporters and subsections of these groups, such as members who do not belong to a branch or have refused to renew.

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- Show history on dashboard - adds metrics to the “[Type of report] history” graphs on the dashboard. Each report type has its own dashboard graph showing a 90 day history; e.g. “Contact history” and “Donation history”. These are useful for seeing trends over time.



EDIT REPORT

[Back to list](#) [Edit filters](#)

Save these Contact filters as a report
Current active member or supporter is "yes" and Membership type is "Member"

Name *

All current members

The name of the report must be unique across your organisation.

Share this report with all descendant organisations
For example, the local parties in your region. If left unticked, this report will only be visible to Federal Party admins.

Show total on dashboard
Selected totals for all report types are shown together in a dashboard card labelled "Totals".

Show history on dashboard
Each report type has its own dashboard graph showing a 90 day history.

[Cancel](#) [Update](#)

Once you are finished, click “Update” at the bottom right of the page. You will then be directed back to the reports page.

Step 4

Click on the home icon () in the blue menu bar to be taken back to your dashboard. The information from your chosen report will now be visible in the “Totals” or “[Type of report] history” dashboard components.

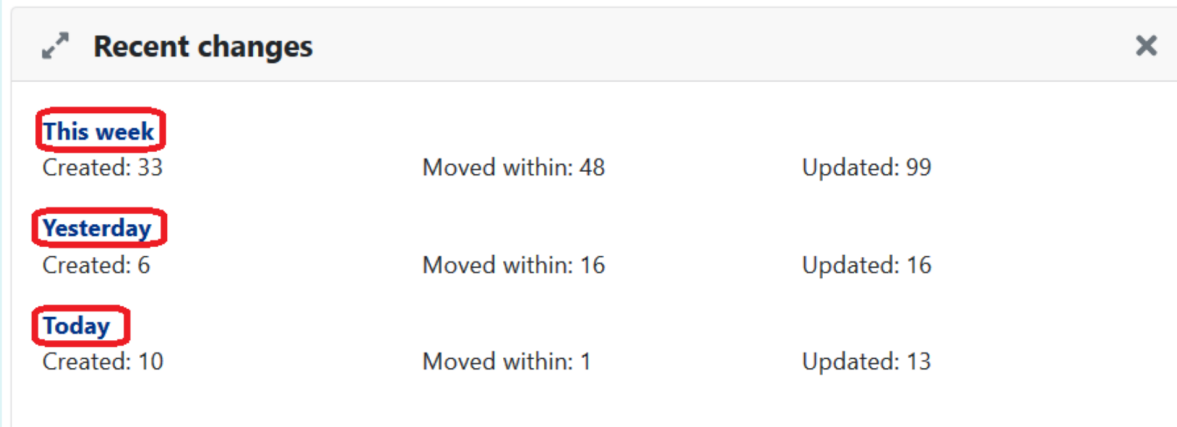
How to set up email alerts for changes

Lighthouse can also alert you by email when there are changes to records in Lighthouse that you might need to review. To set these email alerts up, you just have to follow the steps below.

Step 1

In Lighthouse, open up the Dashboard. Scroll down to the “Recent changes” dashboard component, and click on one of the blue links.

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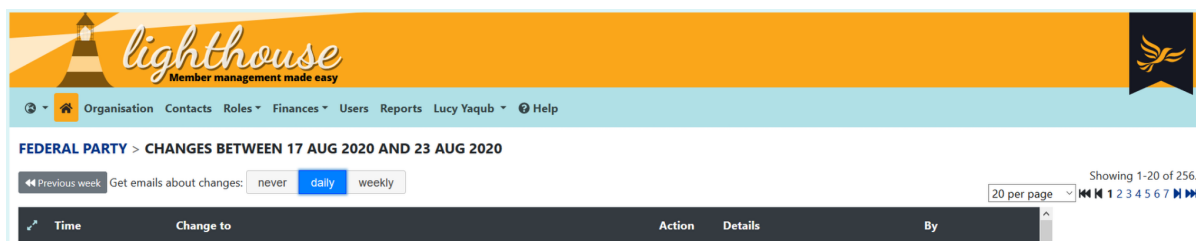


Time	Created	Moved within	Updated
This week	33	48	99
Yesterday	6	16	16
Today	10	1	13

Step 2

The Recent Changes page will now load, where you will see a list of all the recently created and edited contacts within your local party along with a description of any changes.

To set up email alerts, click either “Daily” or “Weekly” above the table of recent changes.



Email alerts contain a summary of the number of contacts created, edited, or who have moved within your local party over the previous day or week. Daily alerts will usually arrive before 6am, whilst weekly ones will arrive each Monday morning.

Changing your organisation’s details

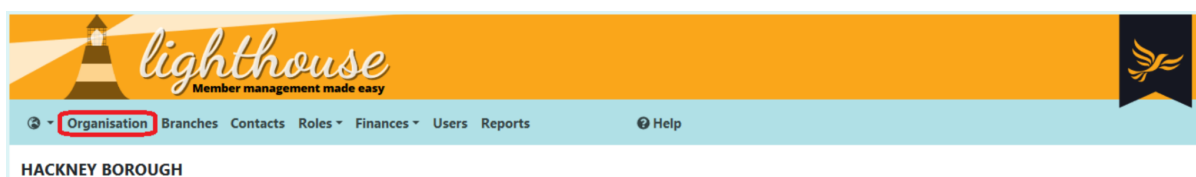
The Organisation tab on Lighthouse contains all of the information that the party knows about your organisation. It’s also where we’ll get information on how to contact you if a member of the public asks, or uses the In Your Area page on party websites.

It’s therefore important to make sure that it’s up to date.

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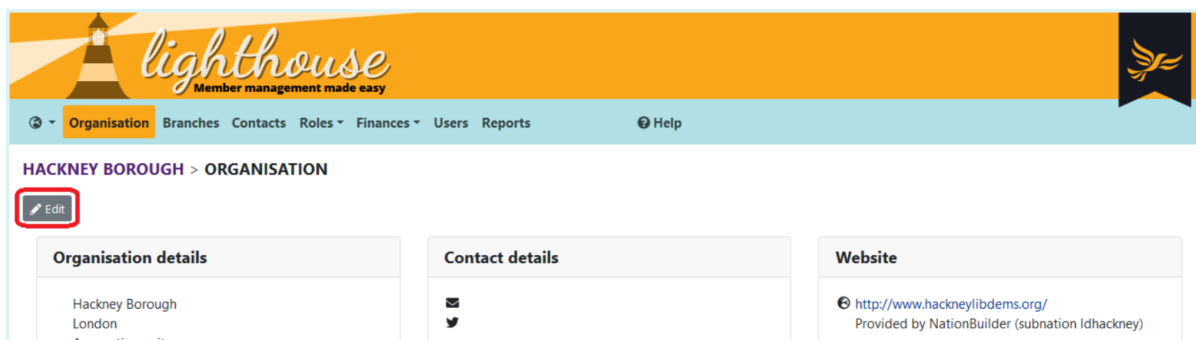
Step 1

Click on the "Organisation" tab in the blue menu at the top.



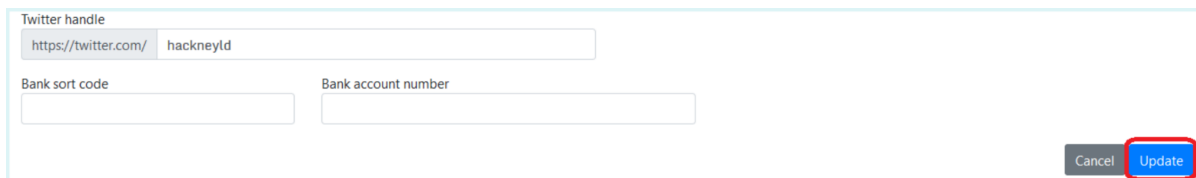
Step 2

The Organisation page will load, where you can view details for your local party including its contact information, address, and bank details. To change any of these, click "Edit" at the top-left of the page.



Step 3

You will be directed to the Edit page. Type your local party's updated details into the fields that appear on the screen, then click "Update" at the bottom of the page.



You will then be directed back to the Organisation page, where you can view your local party's updated details.

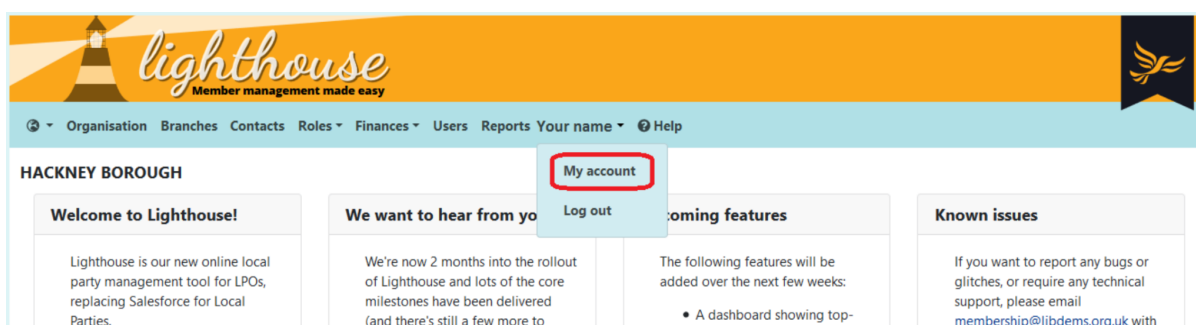
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How to manage your account

You can manage your own account at any time by clicking the tab with your name on it. This page allows you to view your own data as well as change your password and set up an authenticator app.

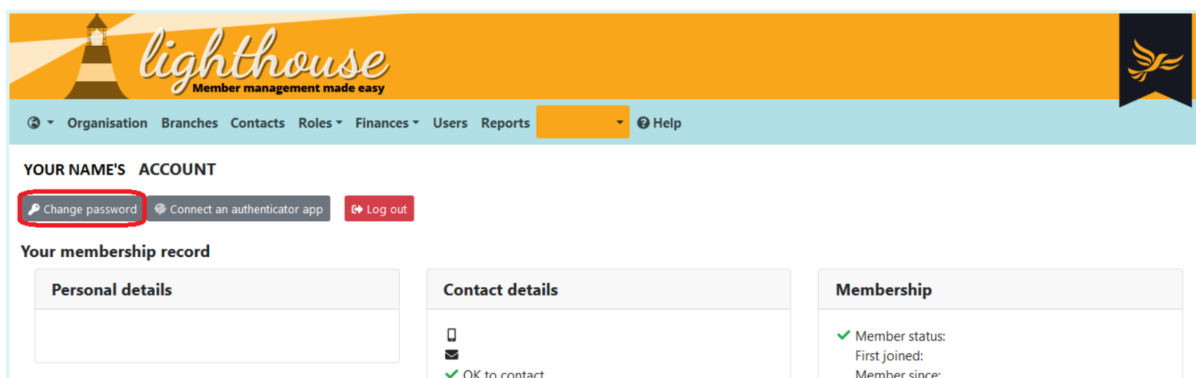
Step 1

After logging into Lighthouse, you will be directed to the Dashboard page. Click on your name in the blue menu at the top, and a drop-down menu will appear. Click on "My Account".



Step 2

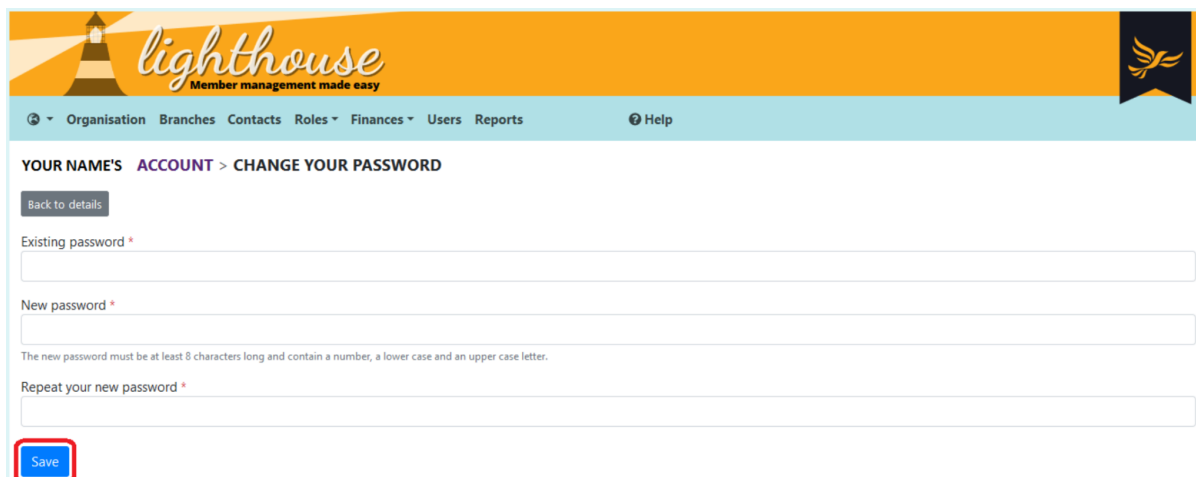
You will be directed to the Account page, where you can see all the details associated with your Lighthouse account. To change your password, click the "Change password" button at the top left of the screen.



Step 3

Type in your current password in the first box, then enter your new password in the second. Type it again in the final box to confirm the change, then click "Save".

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The screenshot shows the Lighthouse web application interface. At the top, there is a navigation bar with the Lighthouse logo and the tagline "Member management made easy". Below the navigation bar, there is a breadcrumb trail: "YOUR NAME'S ACCOUNT > CHANGE YOUR PASSWORD". The form contains three input fields: "Existing password *", "New password *", and "Repeat your new password *". A note below the "New password" field states: "The new password must be at least 8 characters long and contain a number, a lower case and an upper case letter." A "Save" button is located at the bottom left of the form.

Lighthouse will then confirm that your password was successfully changed.

How to connect an authenticator app

What is an authenticator app?

When you log into Lighthouse, you will notice that it sends you an email containing a one-time passcode in order to confirm your identity. This is known as two-factor authentication, and helps Lighthouse double-check that you are who you say you are, before allowing you access to the system.

Authenticator apps provide an alternative form of two-factor authentication, and allow you to generate the passcode on your phone instead. If you'd like to know more about two-factor authentication and why it's important, [click here](#).

How does it work?

When you set up an authenticator app with Lighthouse, the website generates a secret key in the form of a QR code. When you scan the code with the app, the key is then saved to your phone.

After you have done this, Lighthouse will ask you to check your authenticator app for a code when you log in. This code will be displayed on your phone for a short time, usually 30 seconds. When you type in the code, Lighthouse knows the right person is trying to sign in.

Where can I get an authenticator app?

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There are lots of authenticator apps to choose from in the Google and Apple app stores. You install them on your phone in the same way you would any other app.

Some examples of authenticator apps include:

- Google Authenticator
- Microsoft Authenticator
- Lastpass Authenticator
- Authy (used in the example below)

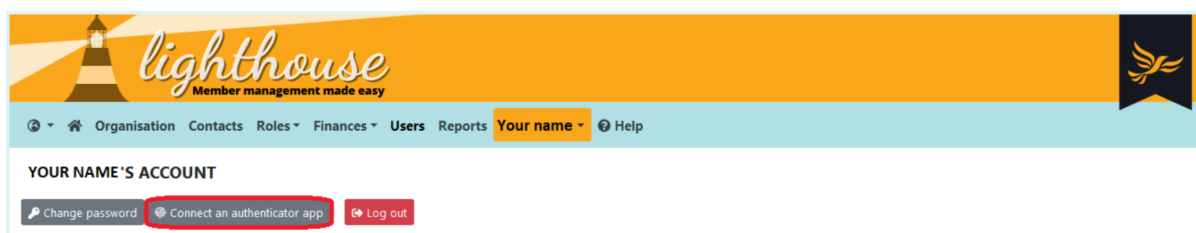
Read on to learn how to connect your authenticator app to Lighthouse.

Step 1

After logging into Lighthouse, you will be directed to the Dashboard page. Click on your name in the blue menu at the top, and a drop-down menu will appear. Click on “My Account”.

Step 2

You will be directed to the Account page, where you can see all the details associated with your Lighthouse account. To connect an authenticator app, click “Connect an authenticator app” at the top left of the page.



Step 3


You will be directed to the “Connect an authenticator app” page. Here you will see a large QR code on the screen, as shown below.

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Open your favourite authenticator app on your device and scan the QR code below to get started.

You can download an app from your app store. Examples include Authy, Duo Mobile, LastPass Authenticator, Microsoft Authenticator, and Google Authenticator.



Step 4

Open up the authenticator app on your phone, and select “Add account”. The app will prompt you to scan the QR code on your computer screen with your phone. You may also be asked to enter a name for the account - just type “Lighthouse”.

Step 5

The next time you log in to Lighthouse, you will be prompted to type in a code from your authenticator app. Open the app, and navigate to your saved “Lighthouse” account. The code will display on the screen for 30 seconds. Type this code into Lighthouse, and you will be allowed to log in.