lighthouse
Member management made easy

Lighthouse User Guide

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- How to report problems on Lighthouse

Published and promoted by Mike Dixon on behalf of the Liberal Democrats, 8-10 Great George Street, London, SW1P 3AE

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- How to view electoral areas and candidates
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1 - Getting started

Last updated: August 2020

What you will learn in this chapter

- How to manage your account
- How to change your local party's details
- How to navigate around Lighthouse
- How to manage your dashboard

How to manage your account

What you will learn in this section

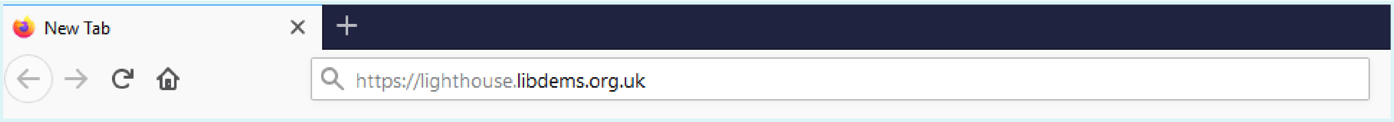
- How to log in to Lighthouse
- How to change your password
- How to connect an authenticator app

How to log in to Lighthouse

Step 1

Open your web browser. In the address bar at the top of the screen, enter the following URL, then press enter.

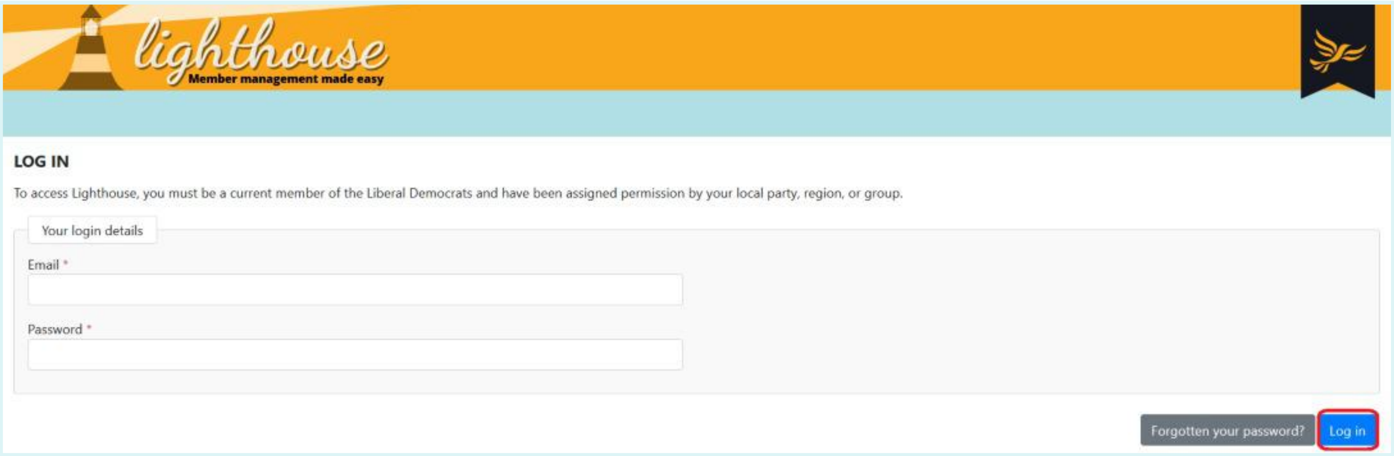
http://lighthouse.libdems.org.uk/



https://lighthouse.libdems.org.uk

Step 2

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

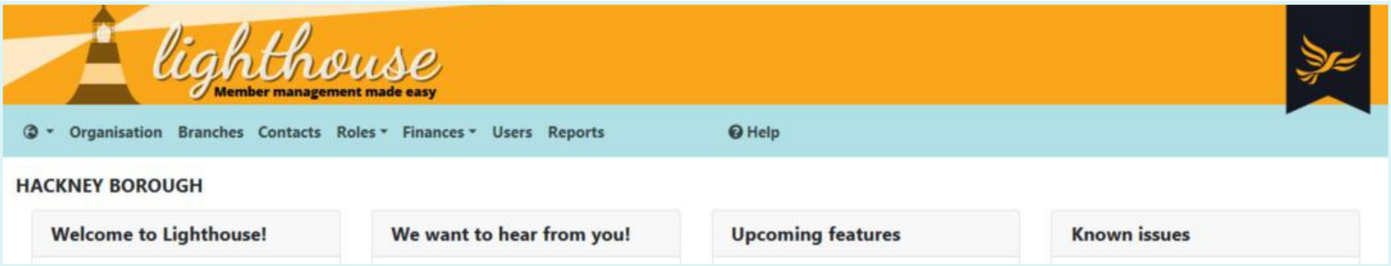


LOG IN

To access Lighthouse, you must be a current member of the Liberal Democrats and have been assigned permission by your local party, region, or group.

Step 3

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



HACKNEY BOROUGH

Welcome to Lighthouse!

We want to hear from you!

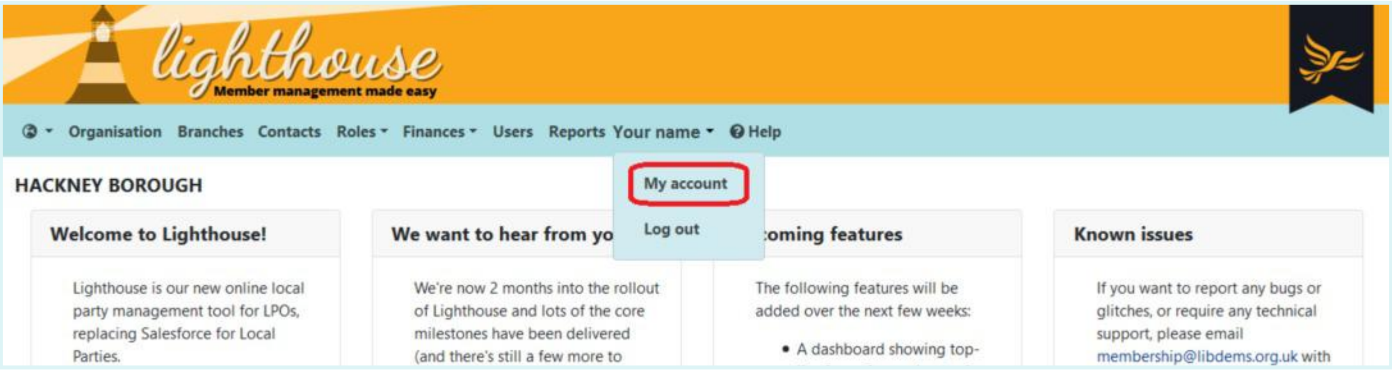
Upcoming features

Known issues

How to change your password

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”.



HACKNEY BOROUGH

Welcome to Lighthouse!

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

We want to hear from yo

We're now 2 months into the rollout of Lighthouse and lots of the core milestones have been delivered (and there's still a few more to

:oming features

The following features will be added over the next few weeks:

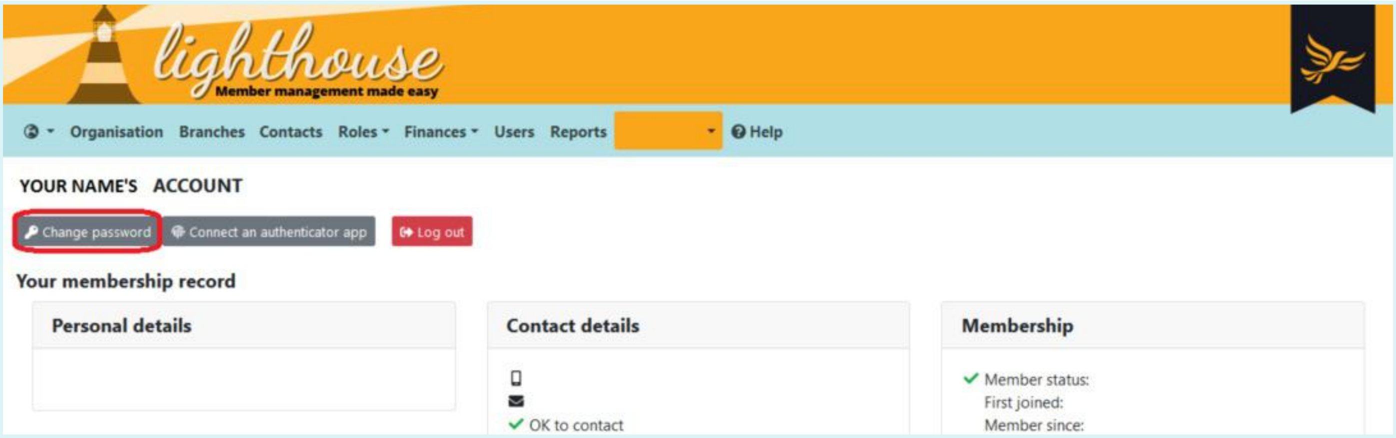
- A dashboard showing top-

Known issues

If you want to report any bugs or glitches, or require any technical support, please email membership@libdems.org.uk with

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.



YOUR NAME'S ACCOUNT

Your membership record

Personal details

Contact details

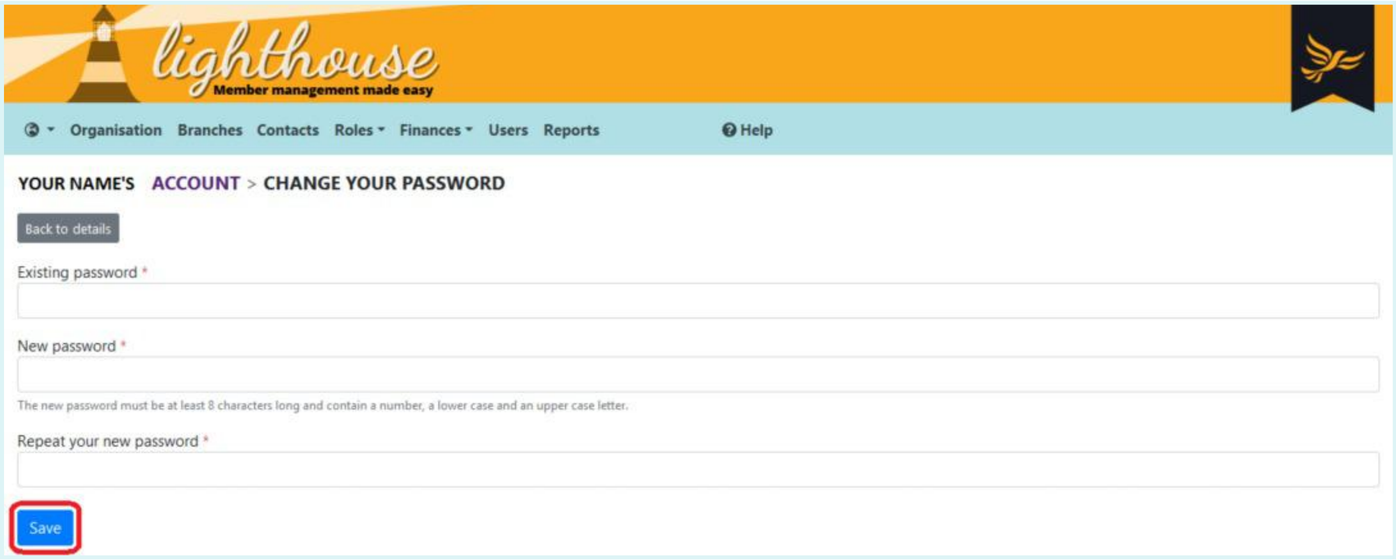
✓ OK to contact

Membership

✓ Member status:
First joined:
Member since:

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”.



YOUR NAME'S ACCOUNT > CHANGE YOUR PASSWORD

Existing password *

New password *

The new password must be at least 8 characters long and contain a number, a lower case and an upper case letter.

Repeat your new password *

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?

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

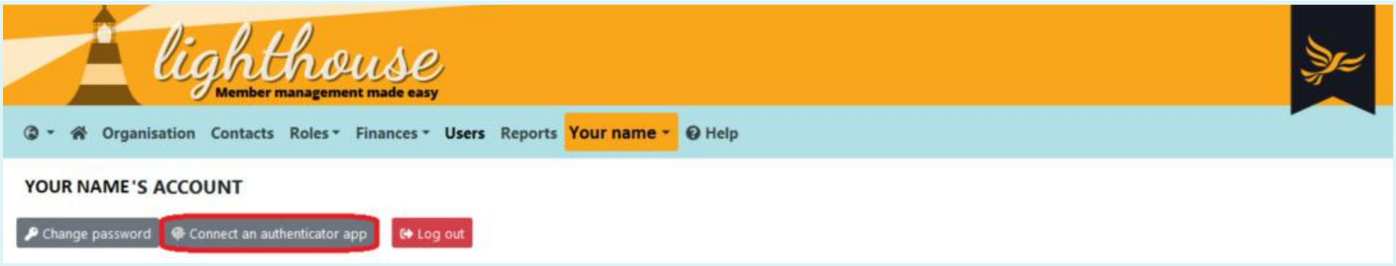
Read on to learn how to connect your authenticator app to Lighthouse.

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".

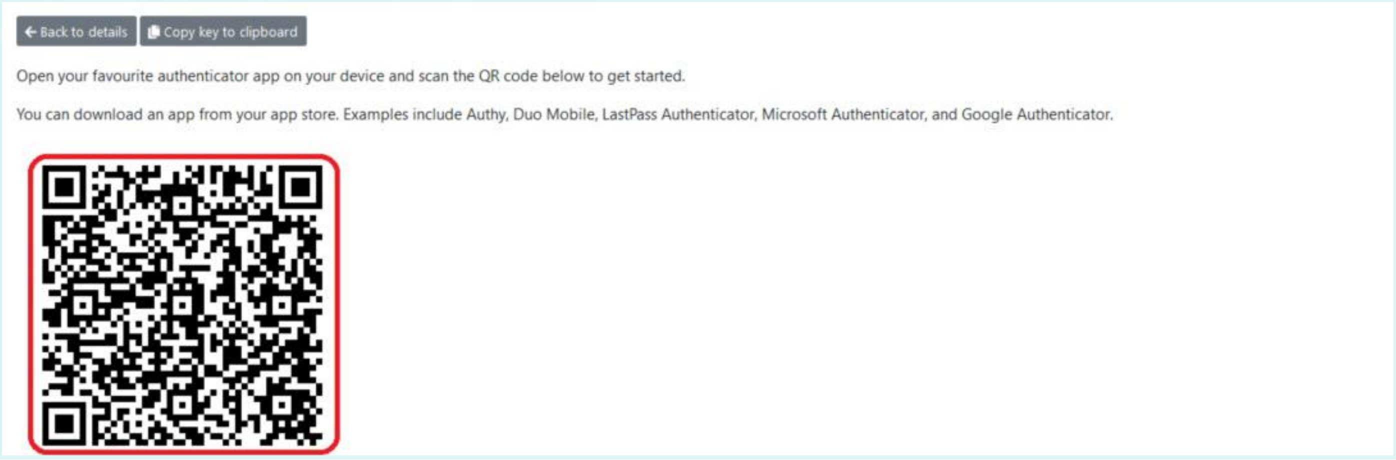
Step 2

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.



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.

Changing your local party’s details

What you will learn in this section

- How to change your local party’s details

Permissions needed

	View	Edit	
Organisation	✓	✓	

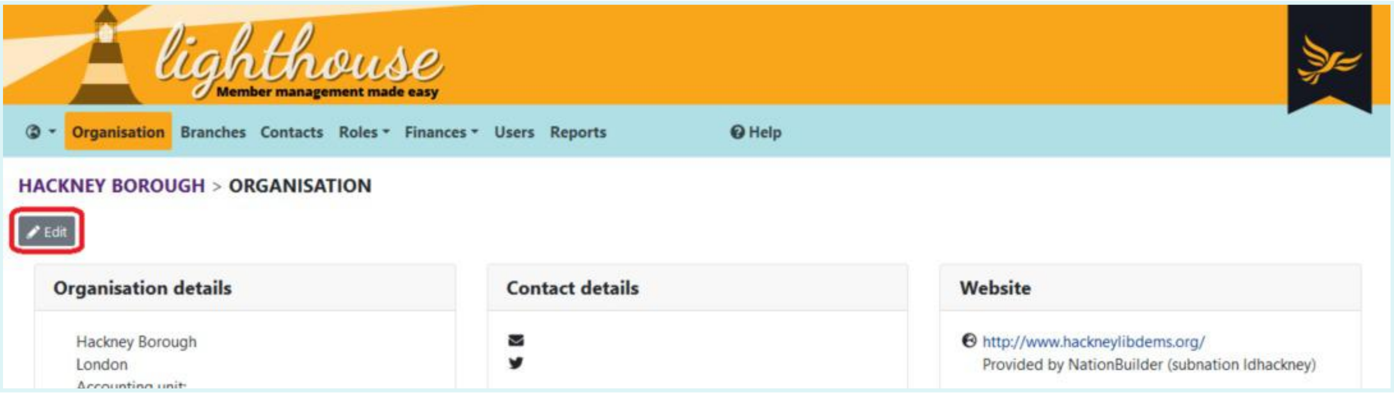
How to change your local party's details

Step 1

After logging into Lighthouse, you will be directed to the Dashboard page. Click on "Organisation" in the blue menu at the top.

Step 2

You will be directed to the Organisation page, 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.

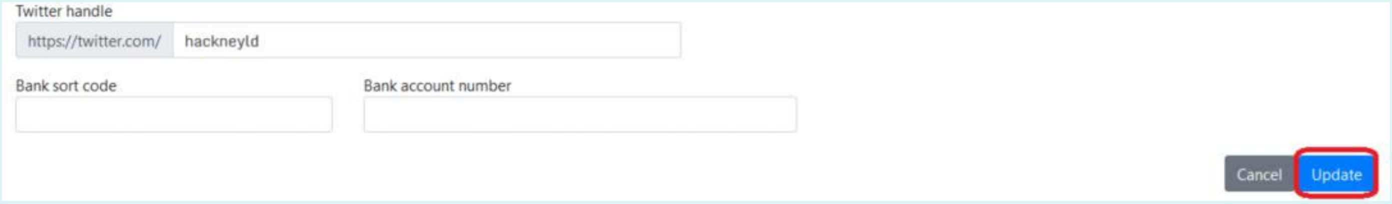


Hackney Borough
London

http://www.hackneylibdems.org/
Provided by NationBuilder (subnation ldhackney)

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.



Twitter handle
https://twitter.com/ hackneyld
Bank sort code
Bank account number

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

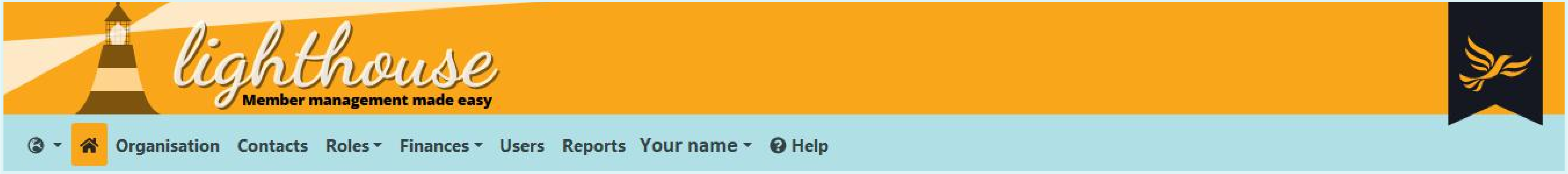
Navigating around Lighthouse

What you will learn in this section

- How to use the menu bar

How to use the menu bar

After logging into Lighthouse, you will see a variety of options in the blue menu bar at the top of the screen. Here is what each one does!



🌐 ▾

Choose a local party to view (permission required)

🏠

View your dashboard

Organisation

View and edit contact and bank details for your local party

Branches

View a list of your local branches

View membership data for your local branches

Add or edit branches and branch codes

Contacts

View local members, supporters and donors

Add contacts to branches

Create or edit contacts

Search and filter lists of contacts

Roles

View, create and edit current member roles

View previous years' member roles

View terms of office for member roles

Finances

View, create and edit donations, pledges and loans

Submit PPERA returns

Submit expenses

View details of local party rebates

Users

View a list of local Lighthouse users

Add new local Lighthouse users*

Edit user permission levels*

*Super Users only

Reports

View a list of your saved custom reports

Edit your saved custom reports

View a list of standard reports

Filter reports by type and creator

Your name

View your personal membership details

Change your password

Help

View more Lighthouse guides

Managing your dashboard

What you will learn in this section

Permissions needed

- What each dashboard component means

	View		
Dashboard	✓		

- How to arrange components on your dashboard
- How to add reports to your dashboard

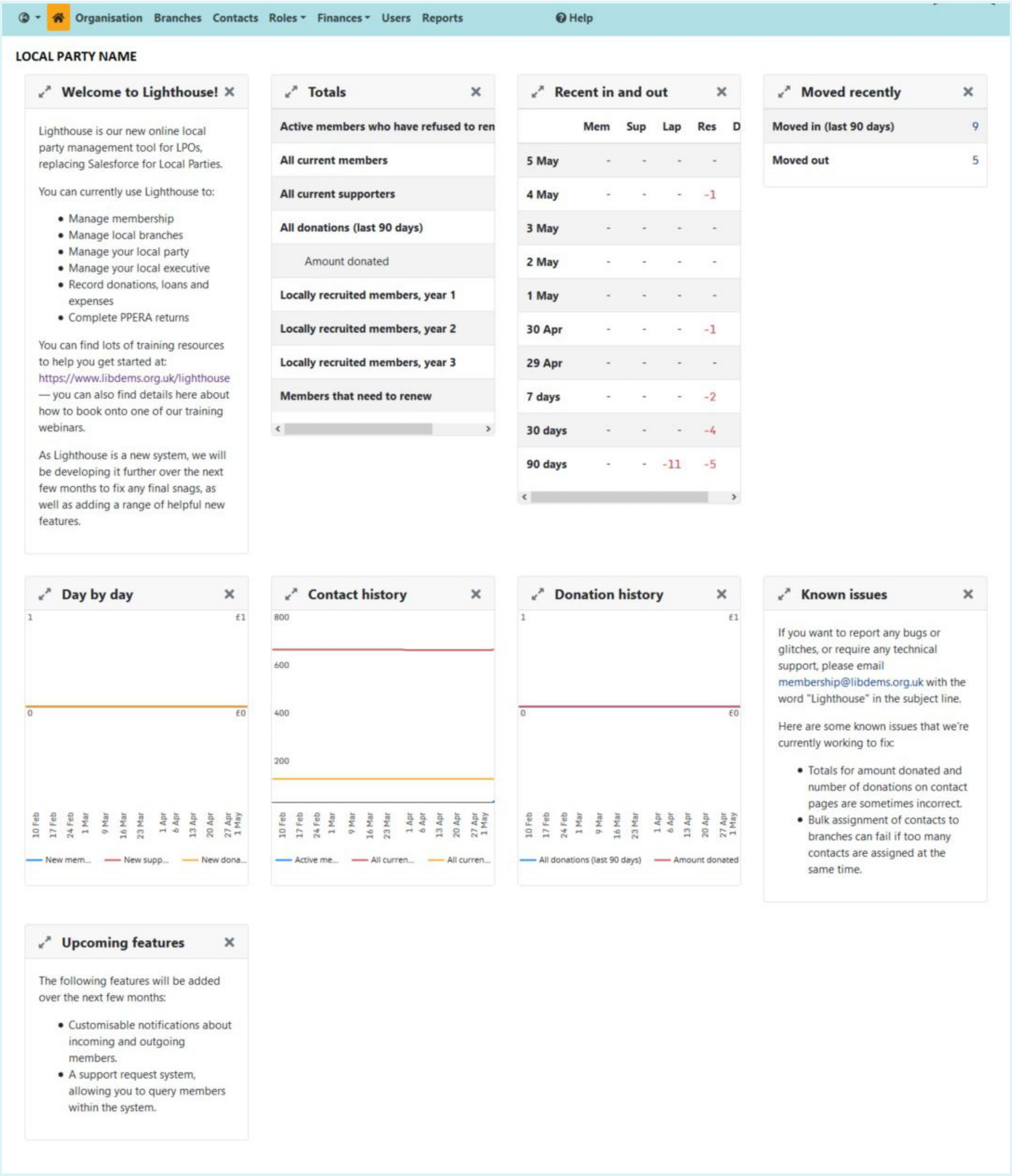
	View		
Dashboard	✓		
Data type used in report; e.g. contacts, donations, loans	✓		

- How to set up email alerts

	View		
Dashboard	✓		

What each dashboard component means

After logging into Lighthouse, you will be directed to the Dashboard page, as shown below:



LOCAL PARTY NAME

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	Res	D
5 May	-	-	-	-	
4 May	-	-	-	-1	
3 May	-	-	-	-	
2 May	-	-	-	-	
1 May	-	-	-	-	
30 Apr	-	-	-	-1	
29 Apr	-	-	-	-	
7 days	-	-	-	-2	
30 days	-	-	-	-4	
90 days	-	-	-11	-5	

Moved recently

Moved in (last 90 days)	9
Moved out	5

Day by day

Contact history

Donation history

Known issues

If you want to report any bugs or glitches, or require any technical support, please email membership@libdems.org.uk with the word "Lighthouse" in the subject line.

Here are some known issues that we're currently working to fix:

- Totals for amount donated and number of donations on contact pages are sometimes incorrect.
- Bulk assignment of contacts to branches can fail if too many contacts are assigned at the same time.

Upcoming features

The following features will be added over the next few months:

- Customisable notifications about incoming and outgoing members.
- A support request system, allowing you to query members within the system.

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

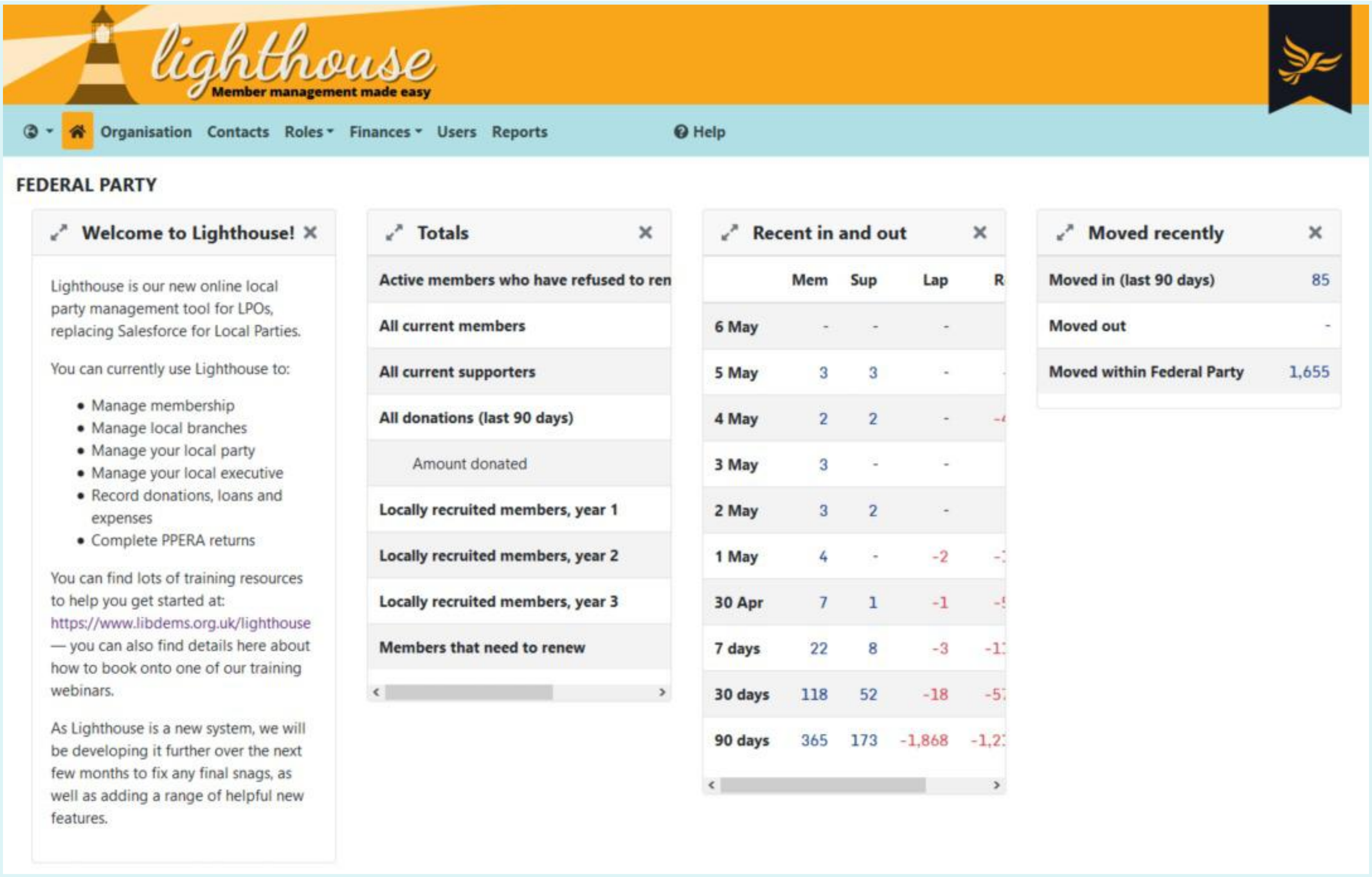
Component name	**Explanation**
Welcome to Lighthouse!	Introduction to Lighthouse and links to other useful Lighthouse guides
Totals	Live counts of current members and supporters, donations, locally recruited members; and any other report where "Show total on dashboard"* is checked.
Recent in and out	Daily counts of members and supporters joining or leaving your local party, as well as counts of lapsed, resigned and deceased members
Moved recently	Counts of how many members have moved into your local party from another one, and vice versa
Day by day	A graph showing numbers of new members and supporters, and amount donated each day
Contact history	A graph showing total numbers of members and supporters each day; and any metrics from other contact reports 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 where "Show history on dashboard"* is checked.
Known issues	A list of known technical issues with Lighthouse which the team are working to resolve, and contact information to report other bugs or glitches.
Upcoming features	A list of exciting new Lighthouse features which will be released 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.

* For more information on how to add report totals or history to your dashboard, click here.

** Donations are not the only type of report for which a history graph can be added to your dashboard. Each report type has its own dashboard graph showing a 90 day history, which can be added to the dashboard by selecting "Show history on dashboard" in the report settings.

How to arrange components on your dashboard

After logging into [Lighthouse](), you will be directed to the Dashboard page. Here you will see all your dashboard components arranged in a grid.



FEDERAL PARTY

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- Manage your local party
- Manage your local executive
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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	-
30 Apr	7	1	-1	-
7 days	22	8	-3	-1
30 days	118	52	-18	-5
90 days	365	173	-1,868	-1,2

Moved recently

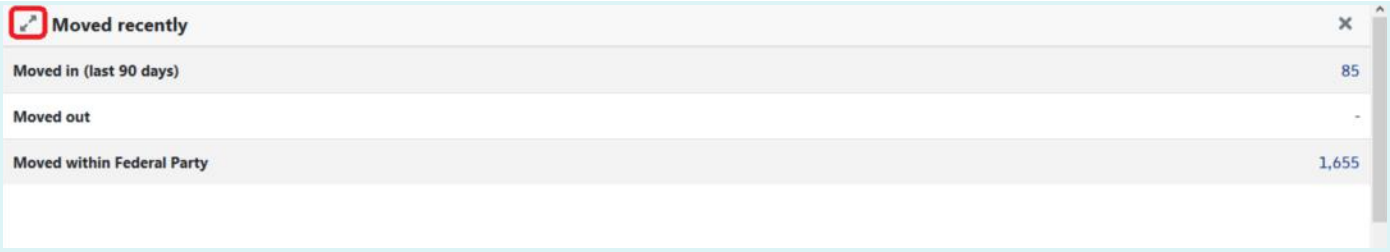
Moved in (last 90 days)	85
Moved out	-
Moved within Federal Party	1,655

How to expand a dashboard component

Moved recently

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

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.

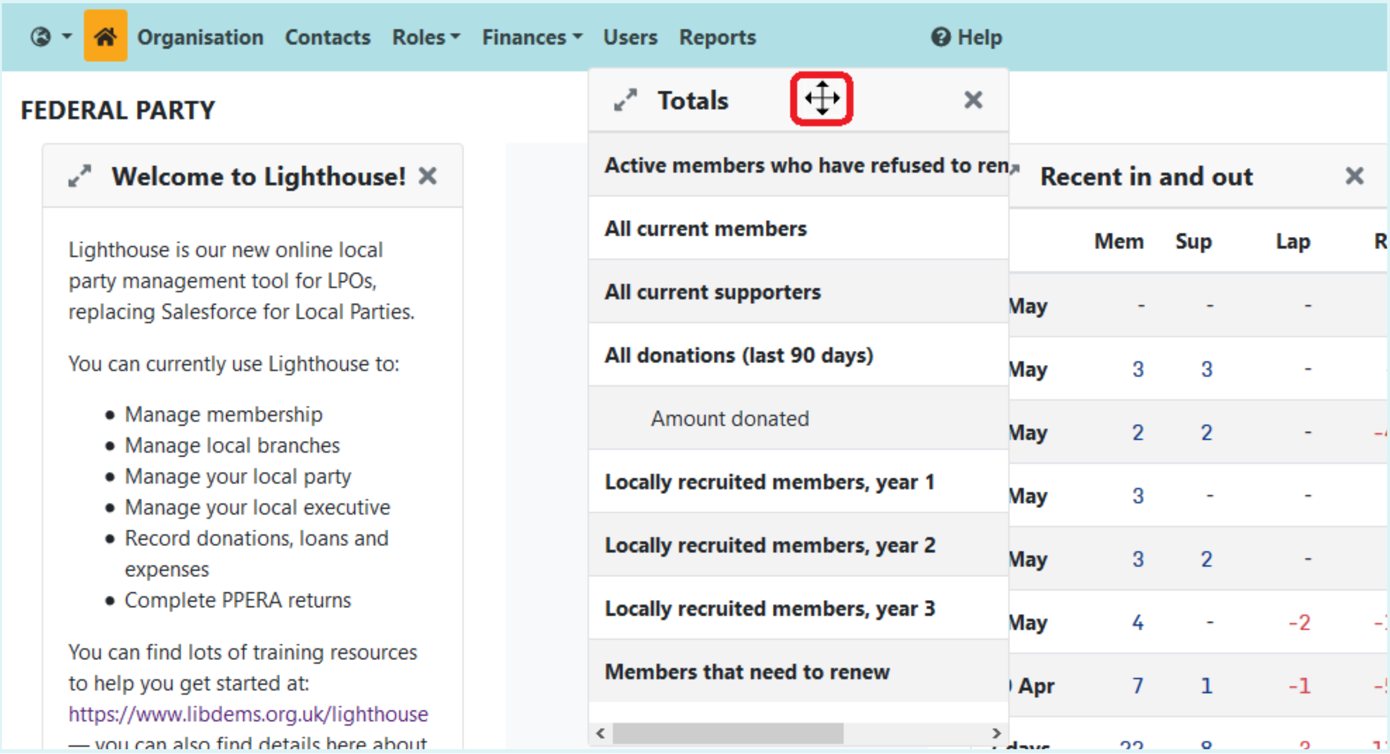


Moved recently

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.



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Totals

- Active members who have refused to ren
- All current members
- All current supporters
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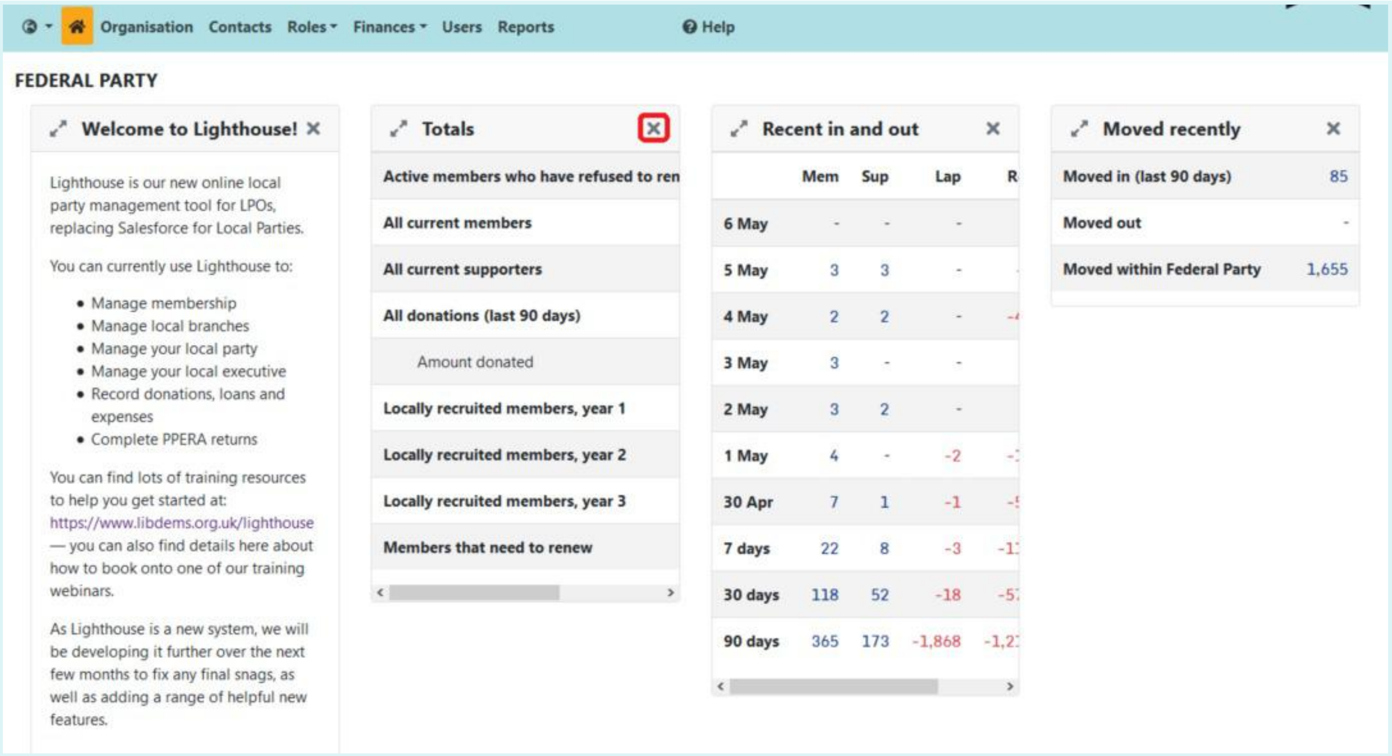
  - Amount donated
- Locally recruited members, year 1
- Locally recruited members, year 2
- Locally recruited members, year 3
- Members that need to renew

Recent in and out

	Mem	Sup	Lap	R
May	-	-	-	
May	3	3	-	
May	2	2	-	-
May	3	-	-	
May	3	2	-	
May	4	-	-2	-
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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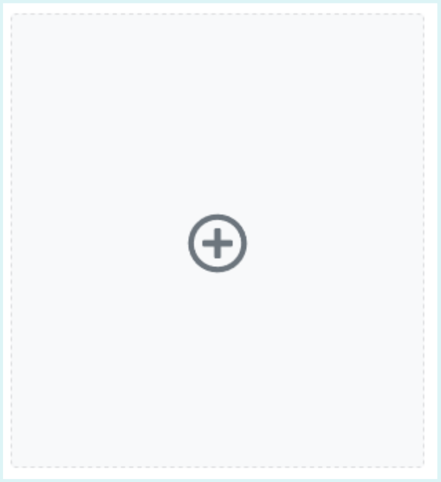
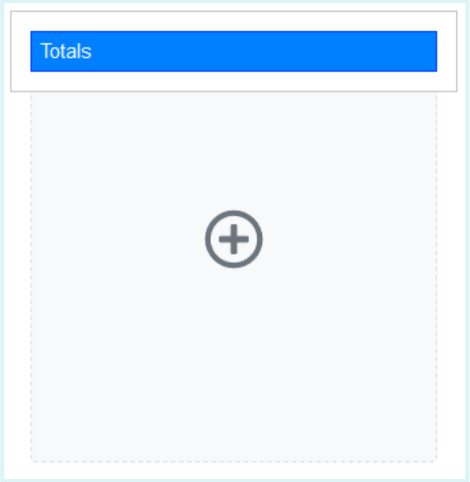
90 days	365	173	-1,868	-1,2

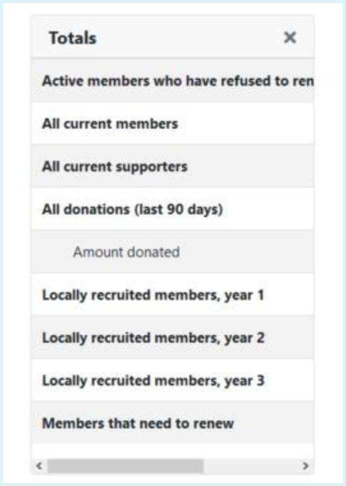
Moved recently

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

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Locally recruited members, year 3
Members that need to renew

How to add reports to your dashboard

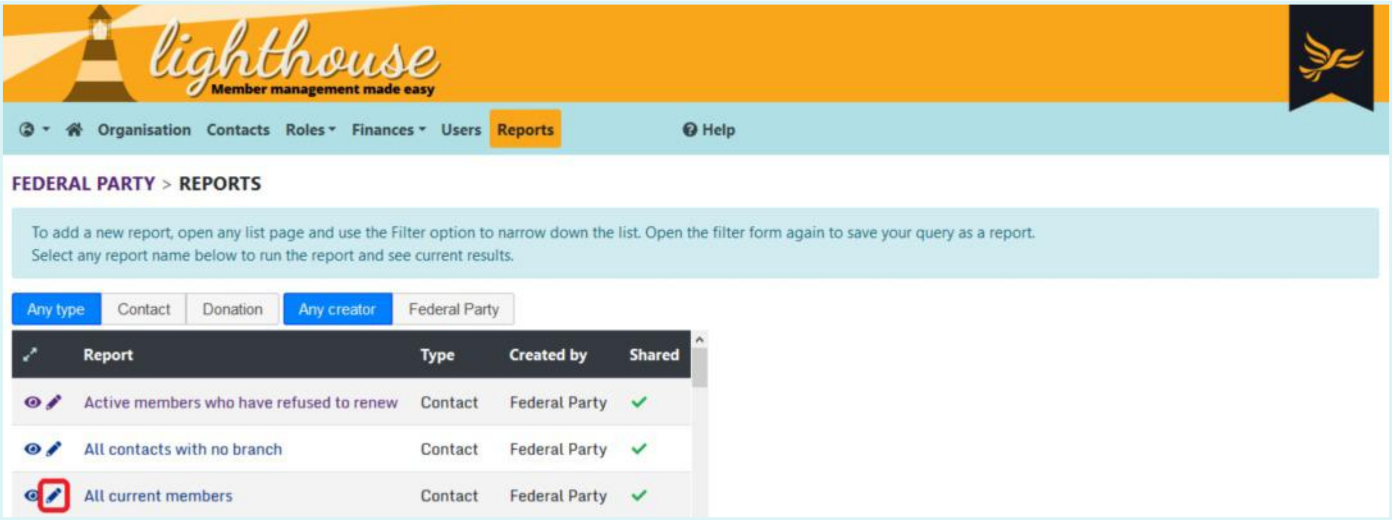
Please note that this guide covers the steps you need to follow to add data from an existing report to your dashboard. If you need help to create a report, click here.

Step 1

After logging into Lighthouse, you will be directed to the Dashboard page. Click on "Reports" in the blue menu at the top.

Step 2

You will be directed to the Reports page, 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.



FEDERAL PARTY > REPORTS

To add a new report, open any list page and use the Filter option to narrow down the list. Open the filter form again to save your query as a report.
Select any report name below to run the report and see current results.

Report	Type	Created by	Shared
Active members who have refused to renew	Contact	Federal Party	✓
All contacts with no branch	Contact	Federal Party	✓
All current members	Contact	Federal Party	✓

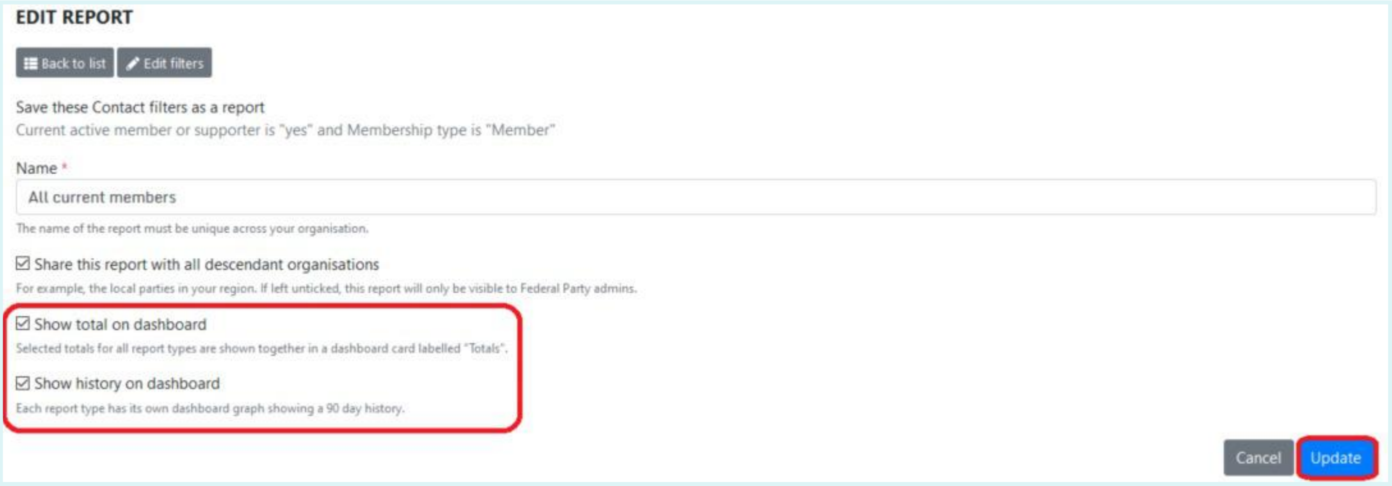
Step 3

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.

- 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

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.

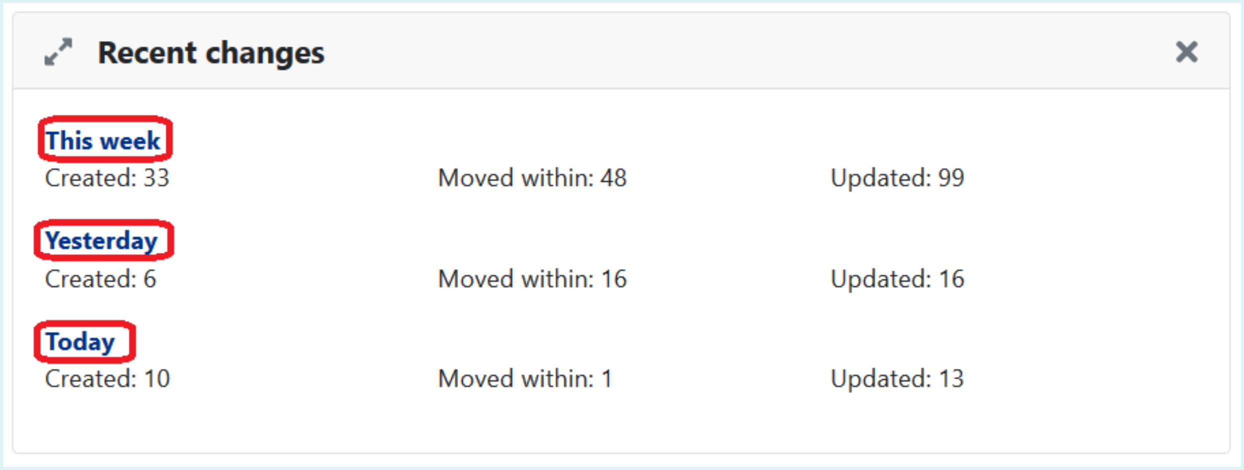
Once you are finished, click "Update" at the bottom right of the page. You will then be directed back to the reports page.

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.

Step 1

After logging into Lighthouse, you will be directed to the Dashboard page. Scroll down to the “Recent changes” dashboard component, and click on one of the blue links.



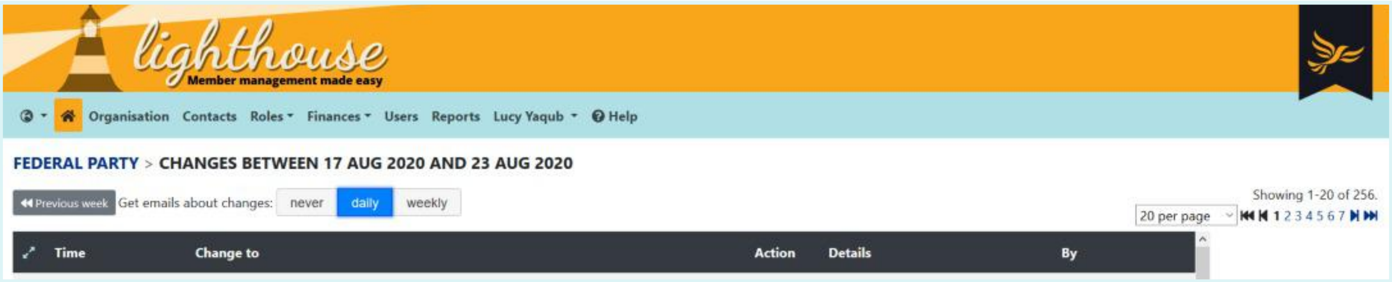
Recent changes

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

Step 2

You will be directed to the Recent Changes page, 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.



FEDERAL PARTY > CHANGES BETWEEN 17 AUG 2020 AND 23 AUG 2020

Get emails about changes: daily

Showing 1-20 of 256.

Time	Change to	Action	Details	By

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.

2 - Managing contacts

Last updated: May 2020

What you will learn in this chapter

- How to view and search for contacts
- How to edit and create contacts

Useful resources

- Membership types and statuses
- Contact preferences
- Refused to renew
- Address update link
- New member interests
- Marking contacts as deceased

How to view and search for contacts

What you will learn in this guide

- How to view your contacts

	View	Edit	Create
Contacts	✓		

- How to search for contacts

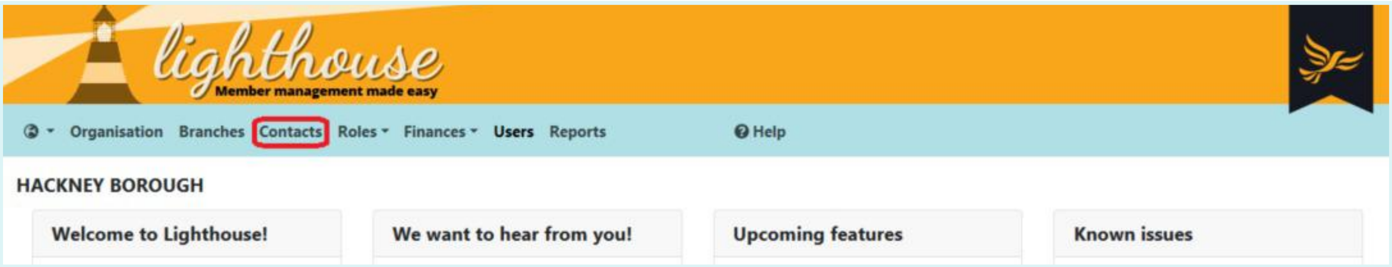
	View	Edit	Create
Contacts	✓		

Permissions needed

How to view your contacts

Step 1

After logging into Lighthouse, you will be directed to the Dashboard page. Click on “Contacts” in the blue menu at the top.

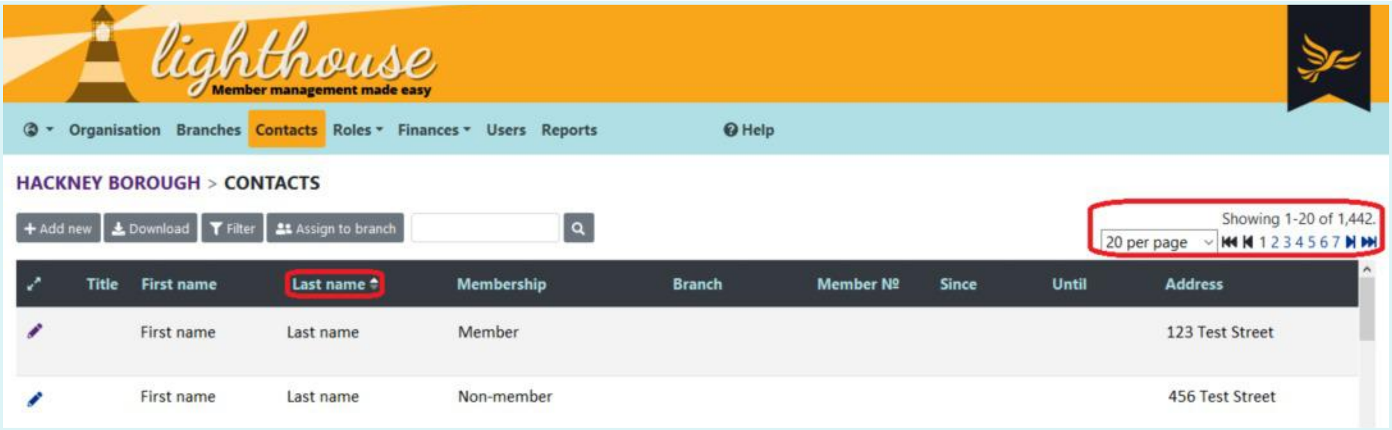


Step 2

You will be directed to the Contacts page. From here, you can view a list of all contacts - that is, members, supporters, non-members (i.e. recently lapsed members) and donors - for your local party.

Scroll down the list using the scroll bars to view more contacts, or click on one of the page numbers on the top right of the page. You can also scroll from side to side to view additional details for each contact.

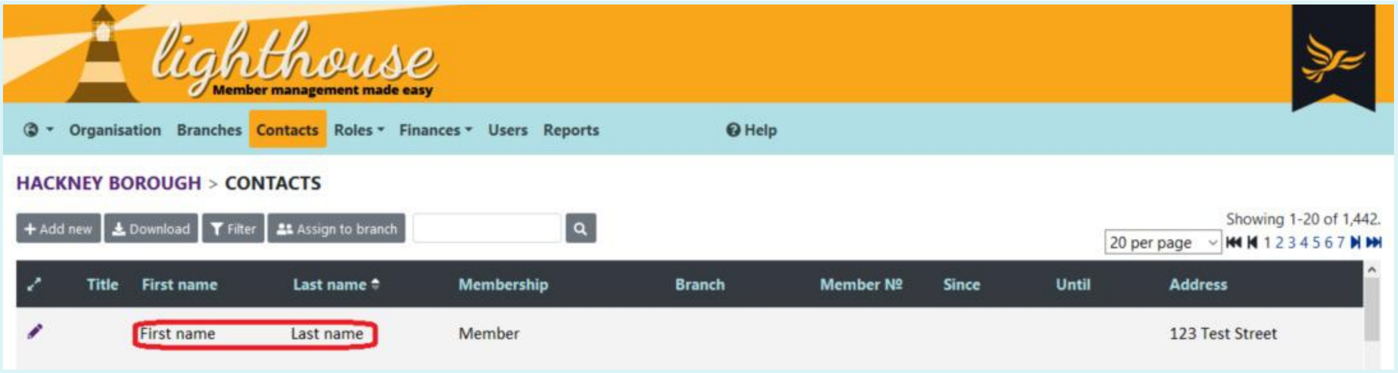
You can also sort contacts by clicking on any of the column titles in the Contacts view. For example, clicking on “Last name” will sort contacts alphabetically by surname.



Title	First name	Last name	Membership	Branch	Member №	Since	Until	Address
	First name	Last name	Member					123 Test Street
	First name	Last name	Non-member					456 Test Street

Step 3

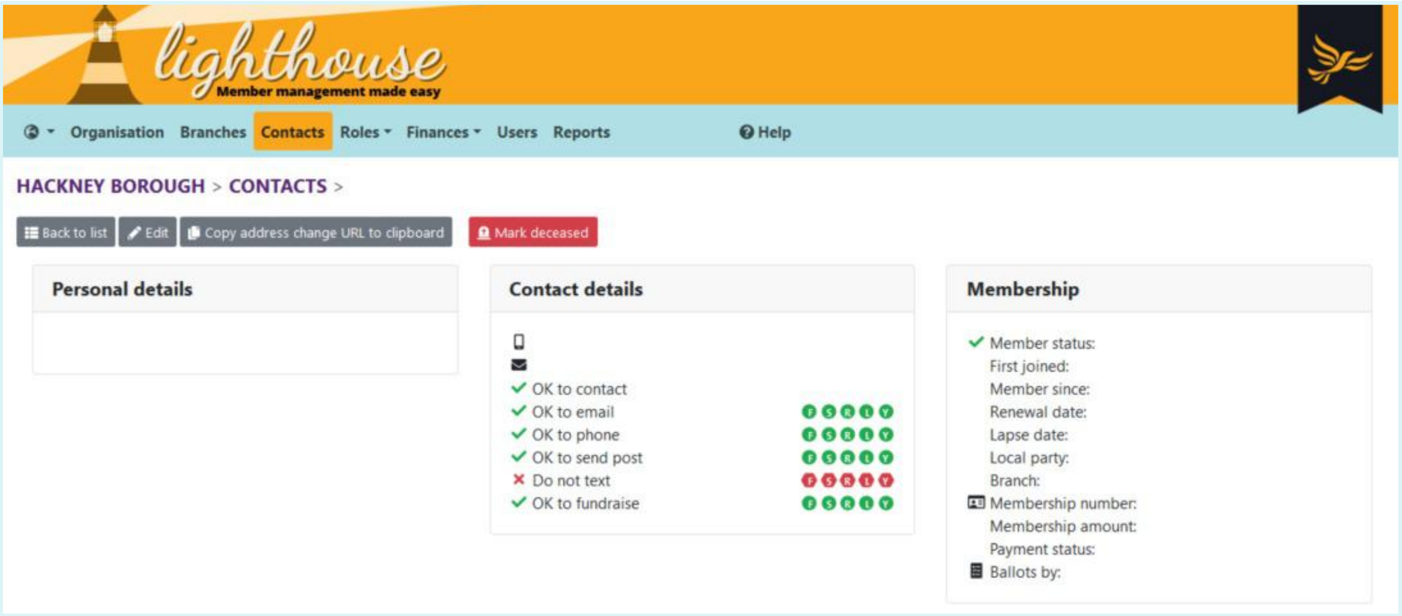
To view more details about one of your contacts, click on either their first name or last name in the list.



Title	First name	Last name	Membership	Branch	Member №	Since	Until	Address
	First name	Last name	Member					123 Test Street

Step 4

You will be directed to a page showing contact details and membership information for your chosen contact.



Personal details

Contact details

✓ OK to contact
✓ OK to email
✓ OK to phone
✓ OK to send post
✗ Do not text
✓ OK to fundraise

Membership

✓ Member status:
First joined:
Member since:
Renewal date:
Lapse date:
Local party:
Branch:
Membership number:
Membership amount:
Payment status:
Ballots by:

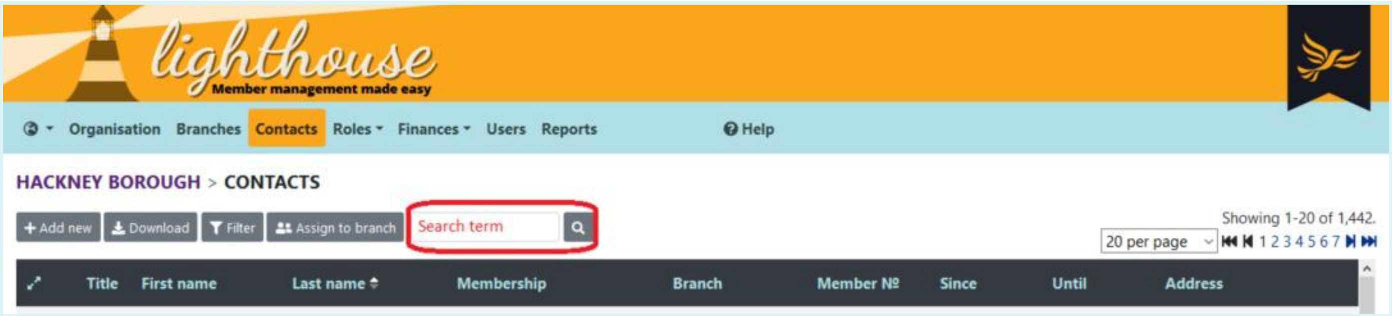
How to search for contacts

Step 1

After logging into Lighthouse, you will be directed to the Dashboard page. Click on “Contacts” in the blue menu at the top.

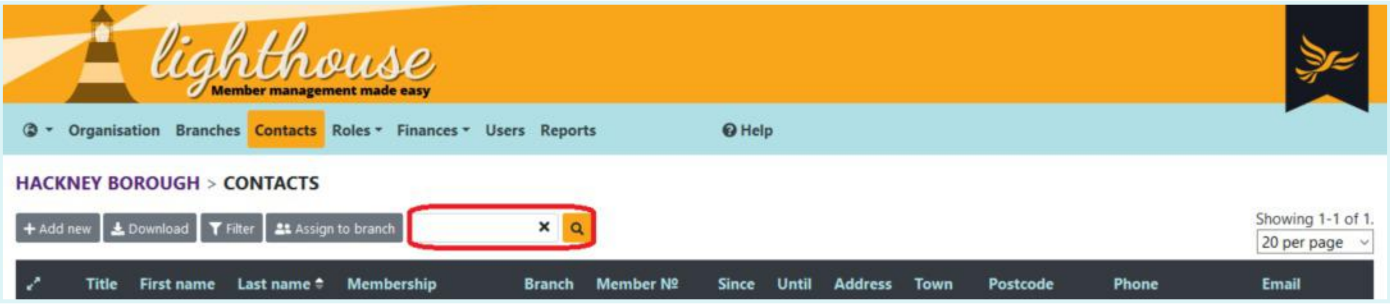
Step 2

You will be directed to the Contacts page. Type in the name of the contact you want to search for in the small white bar next to the “Assign to branch” button. Then either press enter or click on the magnifying glass icon next to the search bar.



Step 3

Contacts matching your search terms will appear on the screen. If you would like to view your full list of contacts again, click on the small cross which will have appeared at the right of the search bar.



How to edit and create contacts

What you will learn in this guide

- How to edit your contacts

	View	Edit	Create
Contacts	✓	✓	

- How to create new contacts

	View	Edit	Create
Contacts	✓	✓	✓

Permissions needed

How to edit your contacts

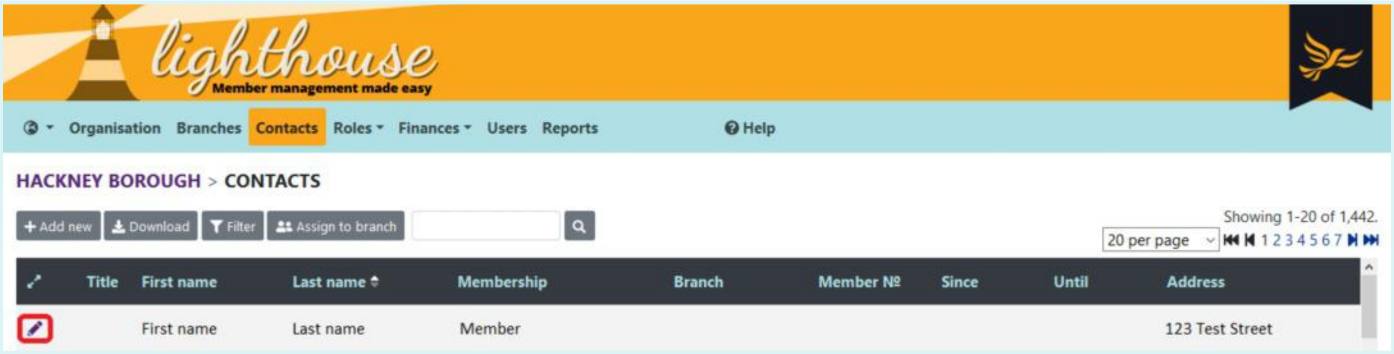
Step 1

After logging into Lighthouse, you will be directed to the Dashboard page. Click on “Contacts” in the blue menu at the top.

Step 2

You will be directed to the Contacts page. If you need support to find the contact you wish to edit, click here to learn more.

Once you have found the contact you would like to edit, click the pencil icon next to their name on the Contacts page.



HACKNEY BOROUGH > CONTACTS

Showing 1-20 of 1,442.

Title	First name	Last name	Membership	Branch	Member №	Since	Until	Address
	First name	Last name	Member					123 Test Street

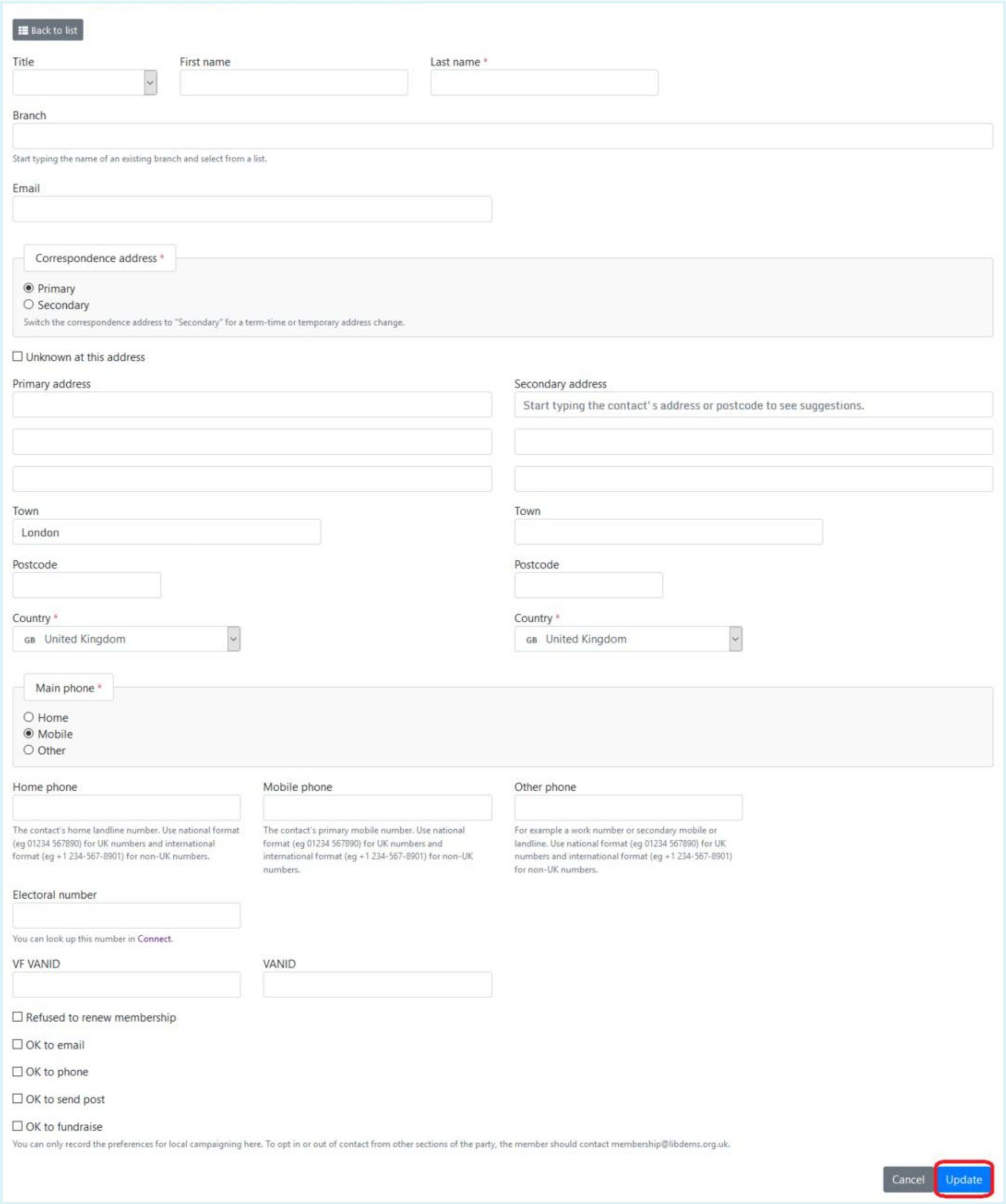
Alternatively, you can click on the name of the contact you wish to edit, and then click “Edit” at the top left of the details page for that contact.

Step 3

You will be directed to the “Edit contact” page. Update your contact’s details in the fields provided.

Remember that when you begin to type an address, Lighthouse will offer a list of suggestions. Selecting one of these will automatically fill in the correct information for you.

When you have finished editing your contact, click “Update” at the bottom of the page. You will be directed back to the Contacts page, where you can view your updated contact in the list.



Title

First name

Last name *

Branch

Start typing the name of an existing branch and select from a list.

Email

Correspondence address *

● Primary

○ Secondary

Switch the correspondence address to "Secondary" for a term-time or temporary address change.

☐ Unknown at this address

Primary address

Secondary address

Start typing the contact' s address or postcode to see suggestions.

Town: London

Town

Postcode

Postcode

Country *: GB United Kingdom

Country *: GB United Kingdom

Main phone *

○ Home

● Mobile

○ Other

Home phone

The contact's home landline number. Use national format (eg 01234 567890) for UK numbers and international format (eg +1 234-567-8901) for non-UK numbers.

Mobile phone

The contact's primary mobile number. Use national format (eg 01234 567890) for UK numbers and international format (eg +1 234-567-8901) for non-UK numbers.

Other phone

For example a work number or secondary mobile or landline. Use national format (eg 01234 567890) for UK numbers and international format (eg +1 234-567-8901) for non-UK numbers.

Electoral number

You can look up this number in Connect.

VF VANID

VANID

☐ Refused to renew membership

☐ OK to email

☐ OK to phone

☐ OK to send post

☐ OK to fundraise

You can only record the preferences for local campaigning here. To opt in or out of contact from other sections of the party, the member should contact membership@libdems.org.uk.

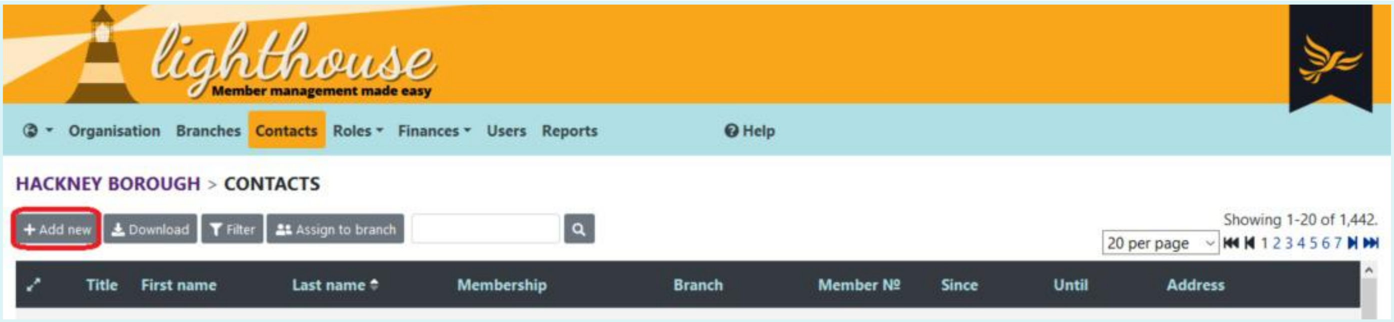
How to create new contacts

Step 1

After logging into Lighthouse, you will be directed to the Dashboard page. Click on “Contacts” in the blue menu at the top.

Step 2

You will be directed to the Contacts page. Click “Add new” to create a new contact.



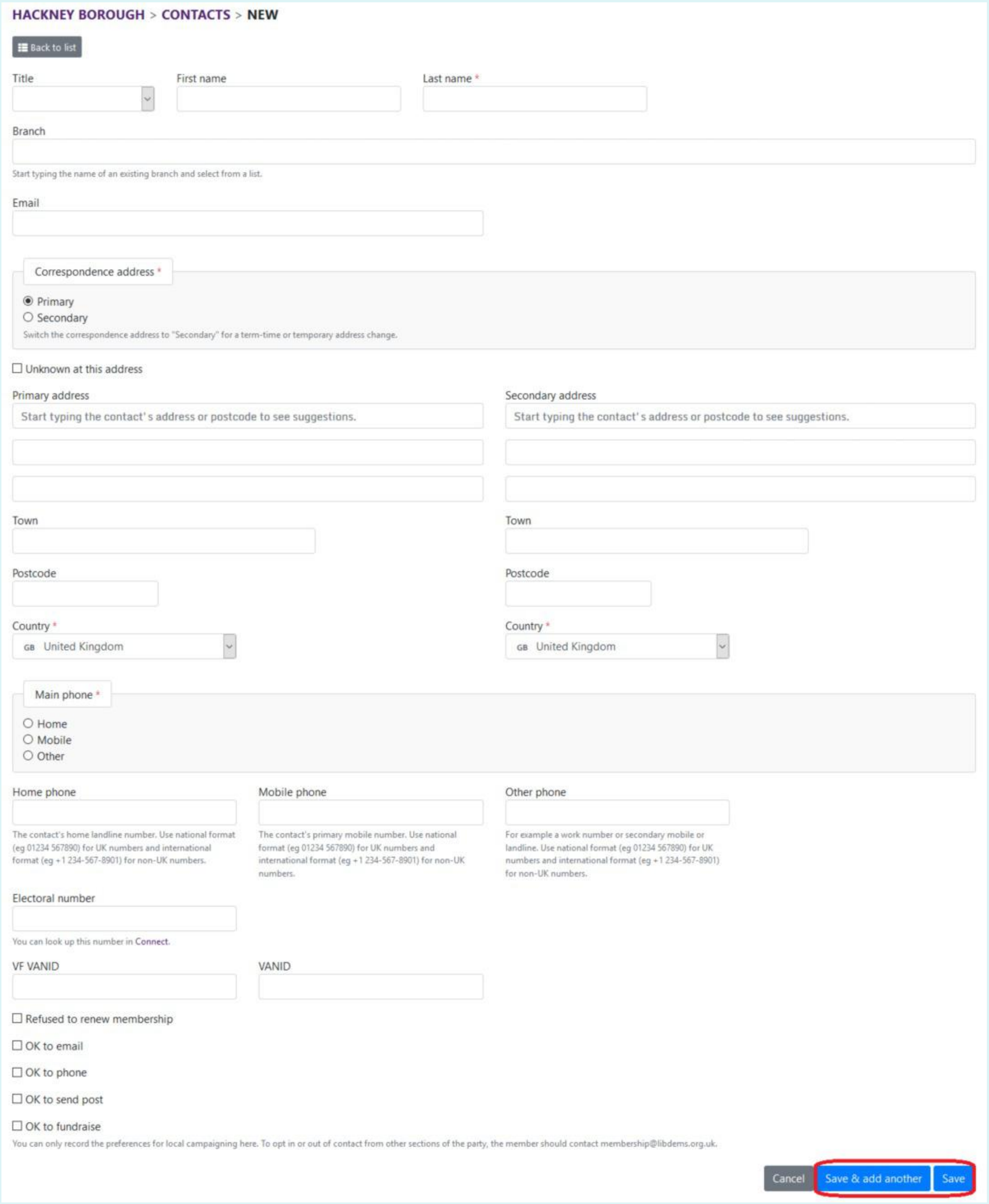
Step 3

You will be directed to the “New Contact” page. On this page you can enter information about your new contact, including their name, contact details, and branch.

Note that a list of suggestions will appear when you begin to type an address. When you click on on of these suggestions, it will automatically fill in the correct fields for you.

When you are finished, click “Save” at the bottom of the screen. You will be directed back to the Contacts page, where your new contact will appear in the list.

Alternatively, click “Save and add another” to create another new contact.



HACKNEY BOROUGH > **CONTACTS** > **NEW**

Back to list

Title
First name
Last name *

Branch

Start typing the name of an existing branch and select from a list.

Email

Correspondence address *

● Primary
○ Secondary

Switch the correspondence address to "Secondary" for a term-time or temporary address change.

☐ Unknown at this address

Primary address
Start typing the contact's address or postcode to see suggestions.
Town
Postcode
Country *
GB United Kingdom

Secondary address
Start typing the contact's address or postcode to see suggestions.
Town
Postcode
Country *
GB United Kingdom

Main phone *

○ Home
○ Mobile
○ Other

Home phone

The contact's home landline number. Use national format (eg 01234 567890) for UK numbers and international format (eg +1 234-567-8901) for non-UK numbers.

Mobile phone

The contact's primary mobile number. Use national format (eg 01234 567890) for UK numbers and international format (eg +1 234-567-8901) for non-UK numbers.

Other phone

For example a work number or secondary mobile or landline. Use national format (eg 01234 567890) for UK numbers and international format (eg +1 234-567-8901) for non-UK numbers.

Electoral number

You can look up this number in Connect.

VF VANID
VANID

☐ Refused to renew membership

☐ OK to email

☐ OK to phone

☐ OK to send post

☐ OK to fundraise

You can only record the preferences for local campaigning here. To opt in or out of contact from other sections of the party, the member should contact membership@libdems.org.uk.

3 - Managing branches

Last updated: August 2020

What you will learn in this chapter

- How to create and edit branches
- How to add contacts to a branch

How to create and edit branches

What you will learn in this guide

- How to create new branches
- How to edit existing branches

Permissions needed

	View	Edit	Create
Branches	✓	✓	✓

	View	Edit	Create
Branches	✓	✓	

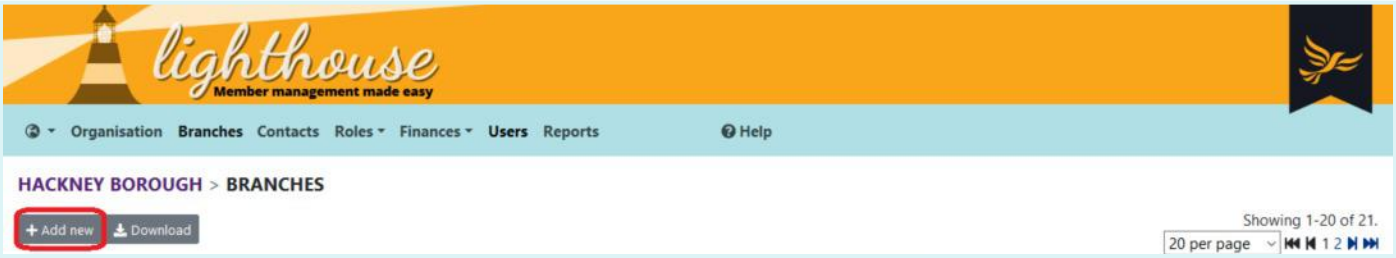
How to create new branches

Step 1

After logging into Lighthouse, you will be directed to the Dashboard page. Click on "Branches" in the blue menu at the top.

Step 2

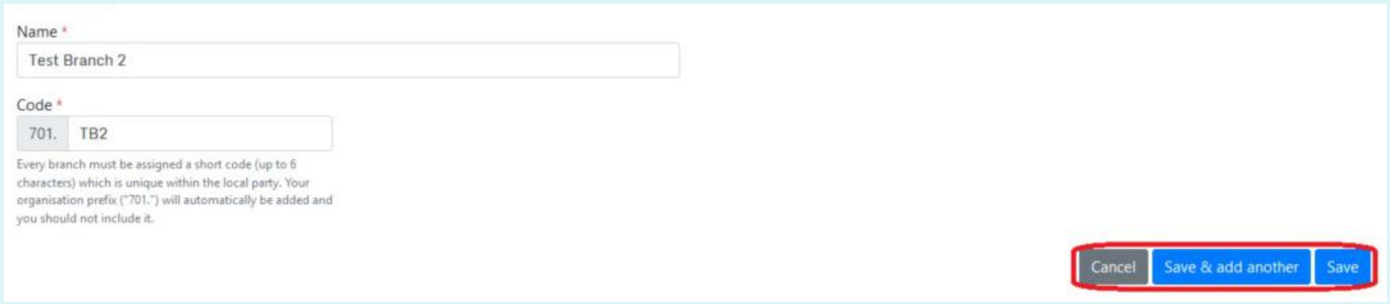
You will be directed to the Branches page, where your current branches will be shown in a list. To create a new branch, click “Add new”.



Step 3

Type in the name of the branch in the Name field, and a short code to identify the branch in the Code field. Each branch needs to have its own unique code of up to six characters, which is not shared by any other branch within your local party.

Then click “Save”, or “Save and add another” to create another new branch.



Name *
Test Branch 2

Code *
701. TB2

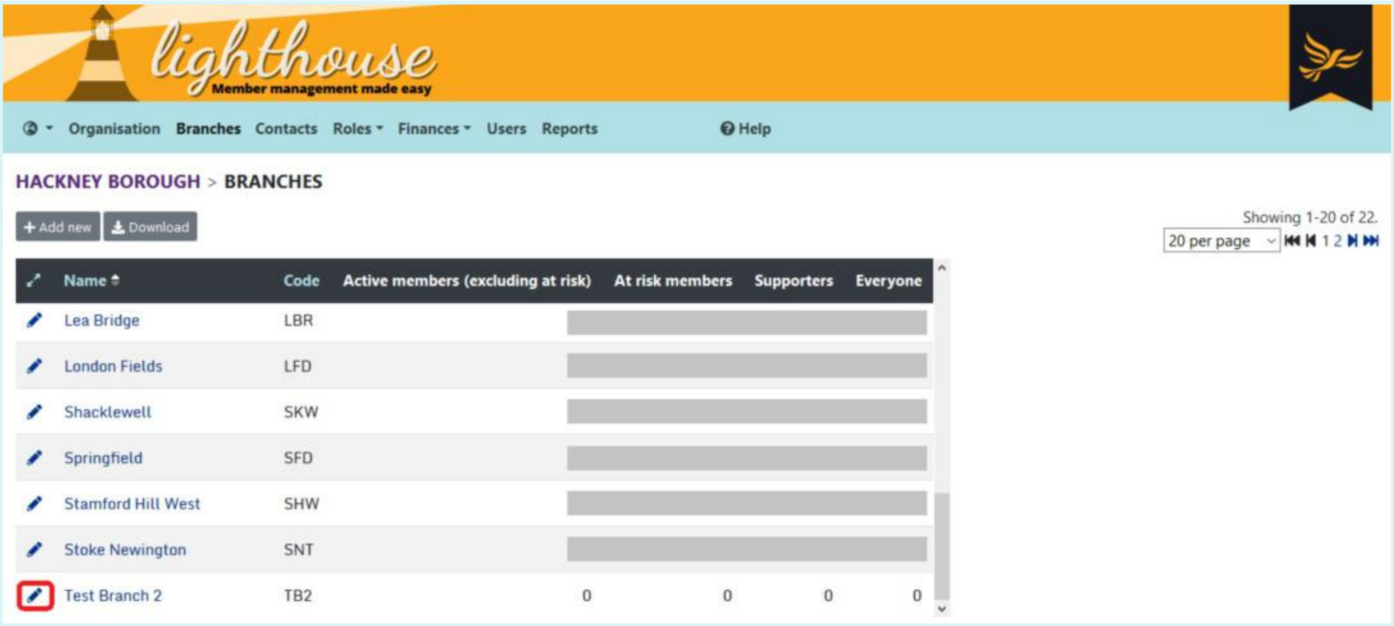
Every branch must be assigned a short code (up to 6 characters) which is unique within the local party. Your organisation prefix ("701.") will automatically be added and you should not include it.

You will be directed back to the Branches page, where your new branch will be shown in the list. To view details of a branch, click on the name of the branch from this list.

How to edit existing branches

Step 1

After logging into Lighthouse, you will be directed to the Dashboard page. Click on “Branches” in the blue menu at the top of the page to view your current branches in a list. To edit an existing branch, click on the pencil next to the name of the branch.



HACKNEY BOROUGH > BRANCHES

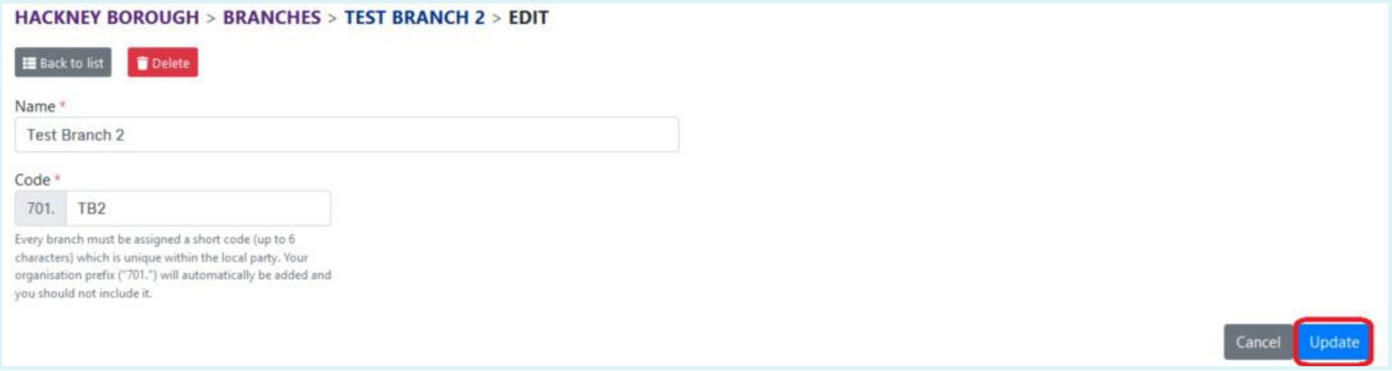
Showing 1-20 of 22.

Name	Code	Active members (excluding at risk)	At risk members	Supporters	Everyone
Lea Bridge	LBR	[redacted]	[redacted]	[redacted]	[redacted]
London Fields	LFD	[redacted]	[redacted]	[redacted]	[redacted]
Shacklewell	SKW	[redacted]	[redacted]	[redacted]	[redacted]
Springfield	SFD	[redacted]	[redacted]	[redacted]	[redacted]
Stamford Hill West	SHW	[redacted]	[redacted]	[redacted]	[redacted]
Stoke Newington	SNT	[redacted]	[redacted]	[redacted]	[redacted]
Test Branch 2	TB2	0	0	0	0

Note that you can also edit branches by clicking on the name of the branch in the list, and then clicking “Edit” at the top left of the screen.

Step 3

Type the updated branch name or code into the Name and Code fields, then click “Update” at the bottom of the page. Alternatively, to delete a branch, click “Delete” at the top of the page.



HACKNEY BOROUGH > BRANCHES > TEST BRANCH 2 > EDIT

Name *
Test Branch 2

Code *
701. TB2

Every branch must be assigned a short code (up to 6 characters) which is unique within the local party. Your organisation prefix ("701.") will automatically be added and you should not include it.

You will be directed to the Branches page, where your updated branch will be shown in the list.

How to add contacts to a branch

What you will learn in this guide

- How to add individual contacts to a branch

	View	Edit	Create
Contacts	✓	✓	

- How to add batches of contacts to a branch

	View	Edit	Create
Contacts	✓	✓	

Permissions needed

How to add individual contacts to a branch

Step 1

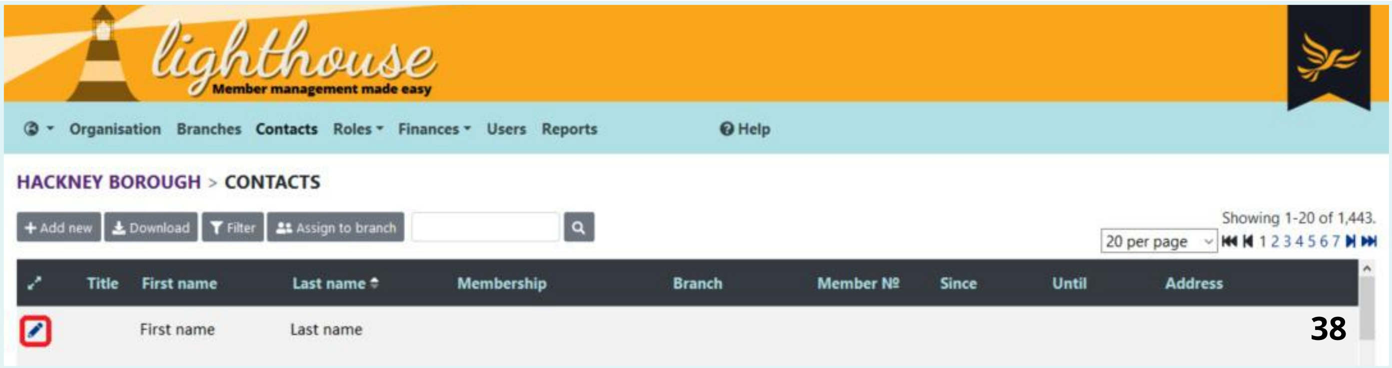
After logging into Lighthouse, you will be directed to the Dashboard page. Click on "Contacts" in the menu bar at the top.

Step 2

You will be directed to the Contacts page. From here, you can view a list of all contacts - that is, members, supporters, and donors - for your local party.

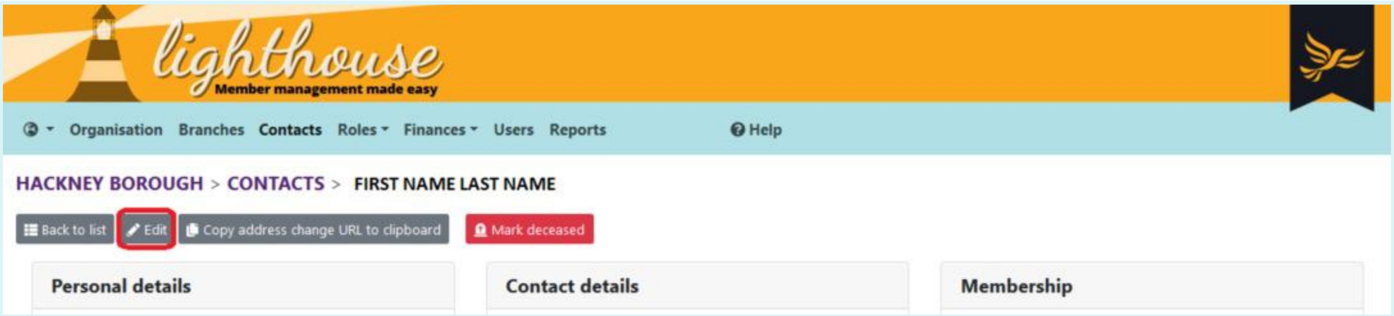
If you need support to create a new branch, click here to learn how to create new branches in Lighthouse.

To add a contact to a branch, either click the edit button in the main contact view...



	Title	First name	Last name	Membership	Branch	Member №	Since	Until	Address
✎		First name	Last name						38

... or click on the contact's name, and then click "Edit" at the top left of the screen.



Step 3

You will be directed to the “Edit contact” page. The option to add the contact to a branch can be found right underneath the “First name” and “Last name” fields.

Start typing in the name of the branch you want to add the contact to, and Lighthouse will suggest a list of branches to choose from. Click on the one you want to choose.

Start typing the name of an existing branch and select from a list.

Step 4

Once you have chosen the branch, click the “Update” button to save your changes.

☐ Refused to renew membership

☐ OK to email

☐ OK to phone

☐ OK to send post

☐ OK to fundraise

You can only record the preferences for local campaigning here. To opt in or out of contact from other sections of the party, the member should contact membership@libdems.org.uk.

How to add batches of contacts to a branch

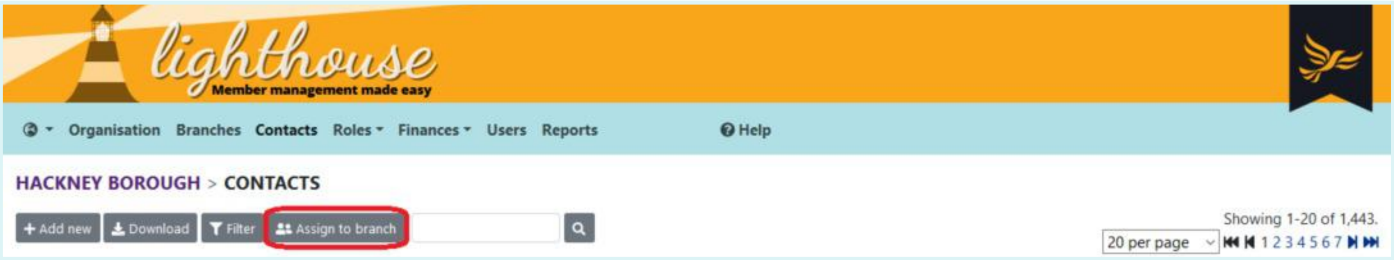
Step 1

After logging into [Lighthouse](), you will be directed to the Dashboard page. Click on "Contacts" in the menu bar at the top.

Step 2

You will be directed to the Contacts page. Before you start, make sure that the list of contacts shown here (including those on subsequent pages) matches the list of people you want to add to a branch.

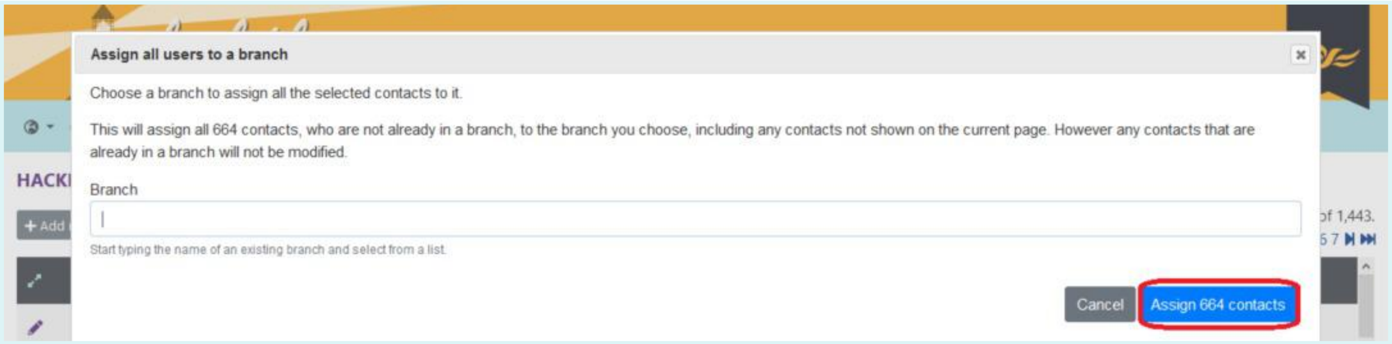
The Contact page lists all contacts by default, so you may wish to use the “Filter” button to narrow down your list - [click here]() for more information on how to do this. Once your list is ready, click “Assign to branch” to get started.



Step 3

A pop-up box will appear, telling you the number of contacts in your list who are not already assigned to a branch. Start typing in the name of the branch you want to assign these people to in the box, and click to choose from the list that appears underneath it.

Finally, click “Assign [number] contacts” to assign your selected contacts to the branch.



Assign all users to a branch

Choose a branch to assign all the selected contacts to it.

This will assign all 664 contacts, who are not already in a branch, to the branch you choose, including any contacts not shown on the current page. However any contacts that are already in a branch will not be modified.

Branch

Start typing the name of an existing branch and select from a list.

Please note that it is currently not possible to un-assign or reassign contacts to different branches in bulk. Should you need to do this, please [contact support]().

4 - Managing reports

Last updated: May 2020

What you will learn in this chapter

- How to create reports
- How to manage your reports
- How to download data from Lighthouse

Creating reports

What you will learn in this section

- How to create contact reports

- How to create other types of reports:
    - Member role reports
    - Donation reports
    - Loan reports
    - Pledge reports
    - Election expense reports

Permissions needed

	View	Edit	Create
Reports	✓	✓	✓
Contacts	✓		

	View	Edit	Create
Reports	✓	✓	✓
Member roles	✓		
Donations	✓		
Election expenses	✓		

How to create contact reports

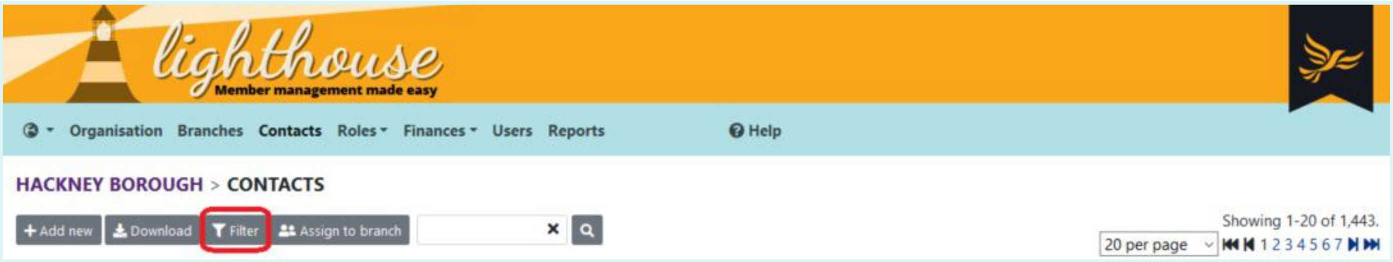
Step 1

After logging into [Lighthouse](), you will be directed to the Dashboard page. Click on "Contacts" in the blue menu at the top.

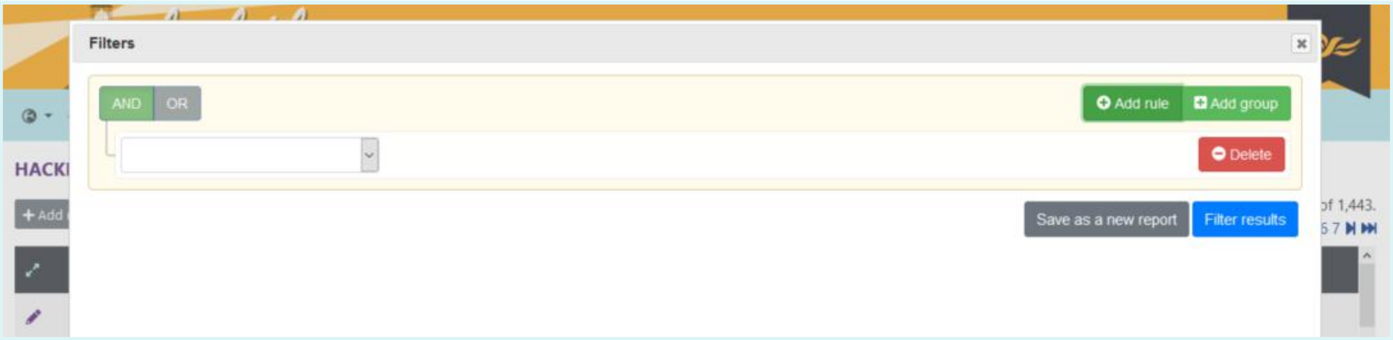
Step 2

You will be directed to the Contacts page. From here, you can view a list of all contacts - that is, members, supporters, and donors - for your local party.

To create a contact report, click the “Filter” button at the top left of the page.



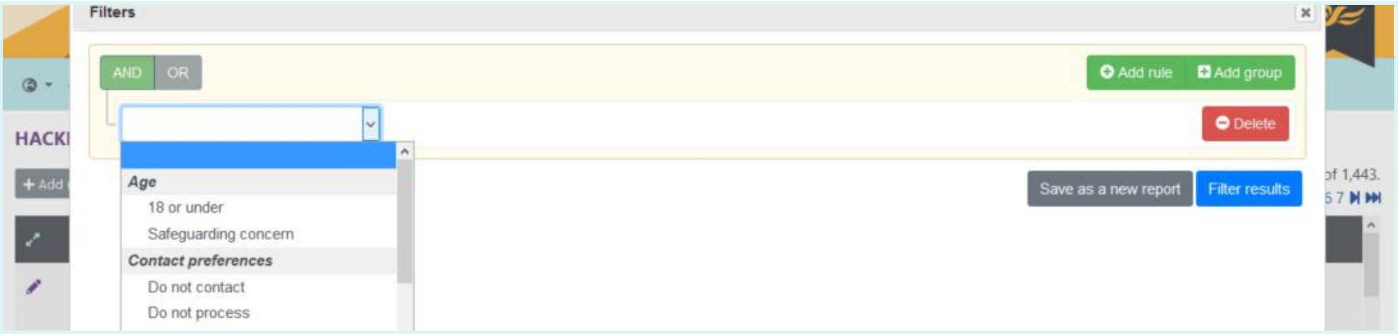
A pop-up window will appear:



Step 3

Next, you will need to create a series of “rules” for Lighthouse to follow, which allow it to select the correct people from your contact list.

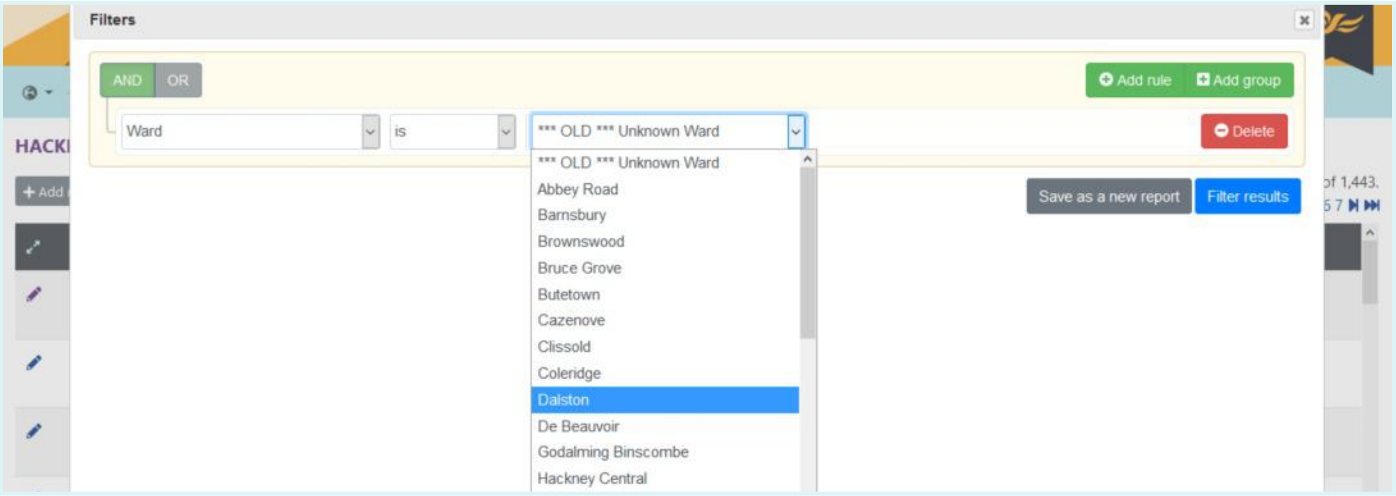
Click into the drop-down list (located underneath the green “AND / OR” buttons) and select a group of contacts you want to include in your contact report.



As an example, let’s say you want to make a report showing all contacts in Dalston ward.

Step 4

Select “Ward” from the first drop-down menu, then choose the ward from the drop-down menu which appears.



Step 5

If you want to make your report more specific, you can add additional rules by clicking “Add rule” or “Add group” at the top right of the screen and repeating the process in steps 3 and 4.

If you intend to contact the people listed in your report, make sure to add this rule:

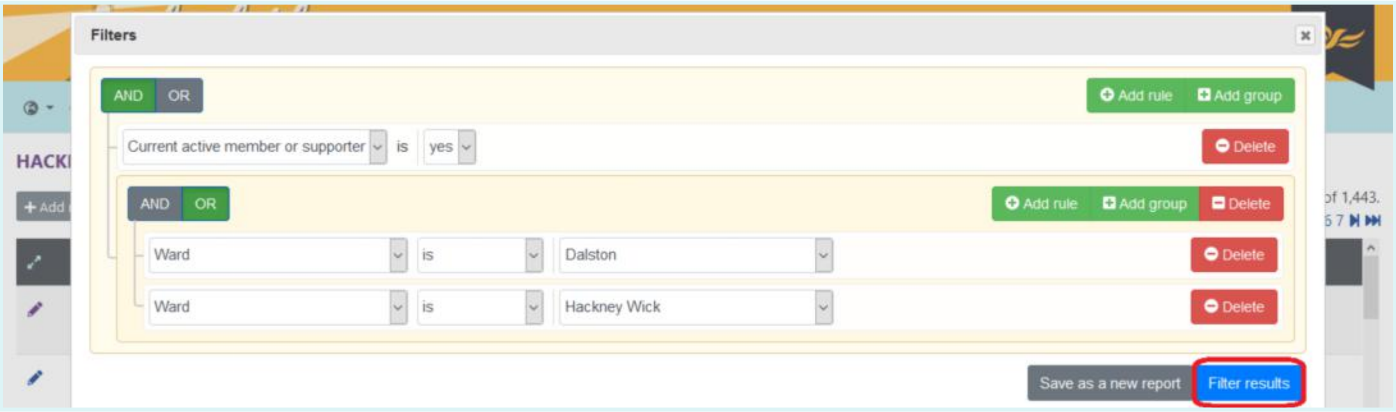
Do not contact is no

This ensures that you will only get in touch with people who have opted in to communications. For more information on opt-ins, see Geek Sheet 2.

For example, in the image below you can see the rules you would need to create a report of all active members in Dalston or Hackney Wick. This is telling Lighthouse to:

- Filter your contacts so that the report only shows the group of current active members
- Then filter that group so that it shows only those current active members living in Dalston or Hackney Wick

Remember to select the correct AND / OR options here - otherwise you may end up with no data in your report. In this example, a report of all current active members living in Dalston *and* Hackney Wick would be empty, as each contact can only live in one ward.



Current active member or supporter is yes

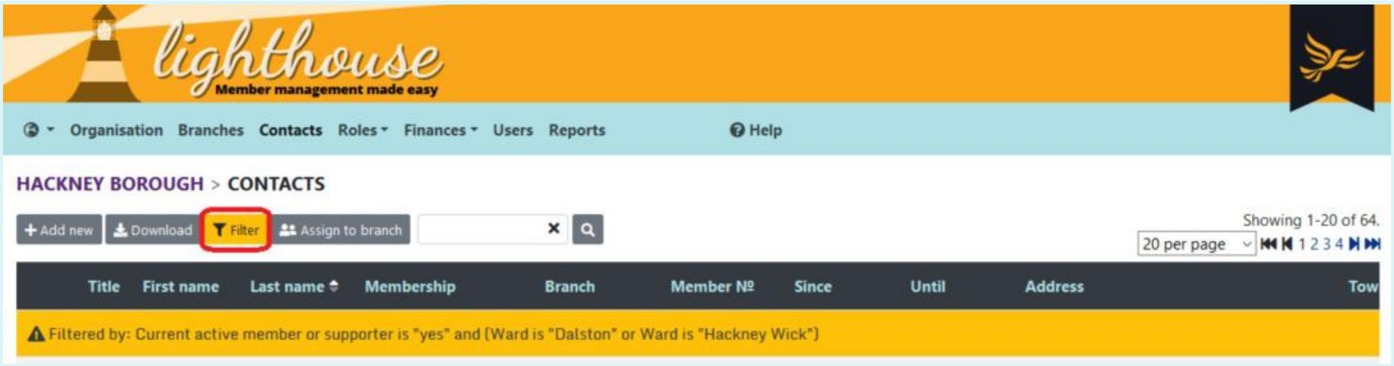
Ward is Dalston

Ward is Hackney Wick

When you are happy with your filters, click “Filter results”.

Step 6

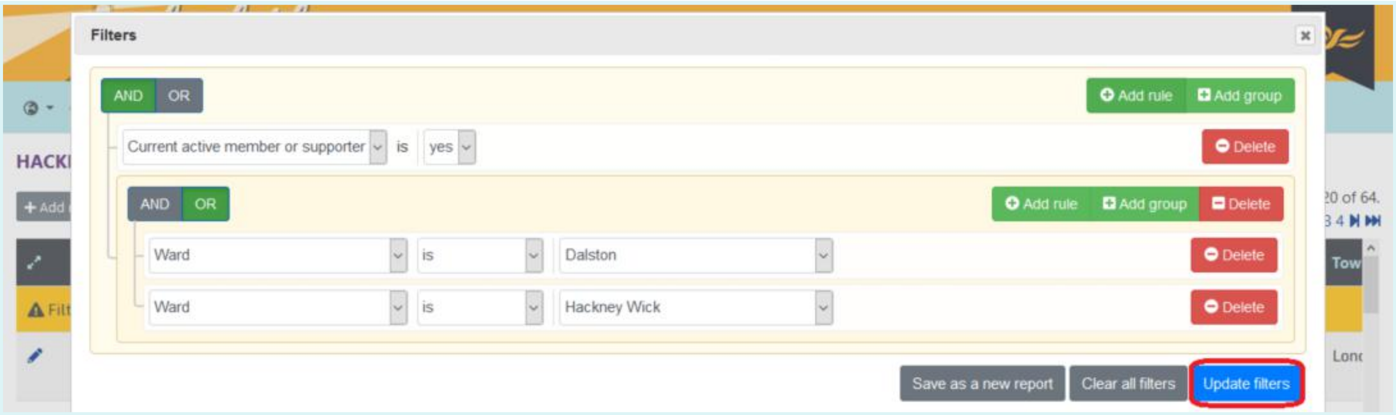
A filtered list of your contacts will appear. If you would like to change your filters, click again on the “Filter” button at the top of the screen. You can then edit your filters within the pop-up menu.



Filtered by: Current active member or supporter is "yes" and (Ward is "Dalston" or Ward is "Hackney Wick")

Step 7

Once you have finished updating your filters, click “Update filters” to view your contact report again.



Current active member or supporter is yes

Ward is Dalston

Ward is Hackney Wick

Step 8

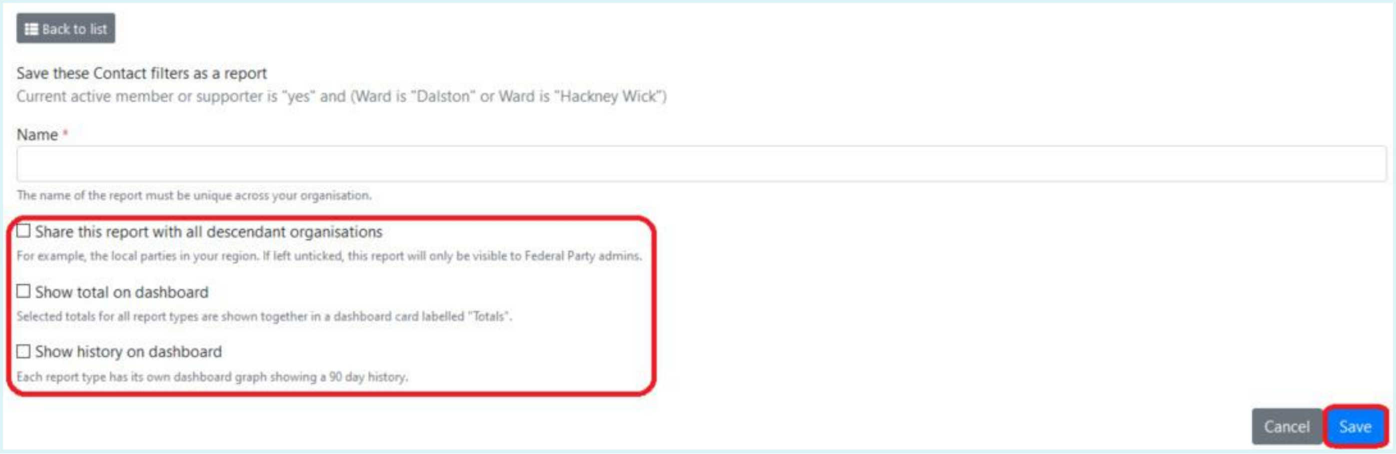
You can save your report in order to view it again at a later date. To do this, click “Save as a new report”.

Step 9

You will then need to type a name for your report. Depending on the type of data in your report, you may also be given three options to choose from:

- Share this report with all descendant organisations - gives access to all organisations below yours in the hierarchy, for example all the local parties in your region (if left unticked, your 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

For more information about adding report data to your dashboard, click here.



Save these Contact filters as a report

Current active member or supporter is "yes" and (Ward is "Dalston" or Ward is "Hackney Wick")

Name *

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.

Once you have completed all the relevant fields, click “Save”. You can view your saved reports in the Reports tab - click here to find out more.

How to create other types of reports

You can now use Lighthouse to create reports covering data other than your contacts. You can now create reports about:

- Member roles
- Donations
- Pledges
- Loans
- Election expenses

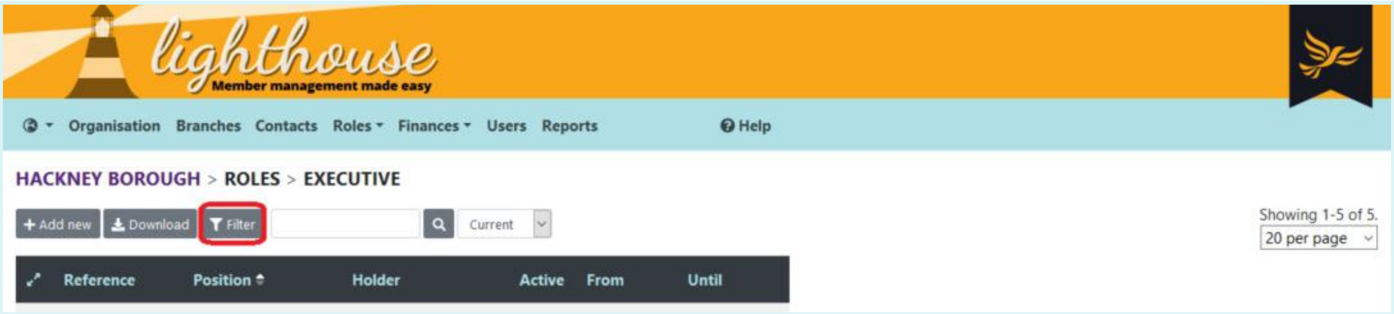
The process followed is identical to the one you would use to create contact reports, and is the same for all the types of reports listed above. For this example, we will make a report to show the current ordinary executive members for Hackney.

Step 1

After logging into Lighthouse, you will be directed to the Dashboard page. Click on “Roles” and select “Executive” from the drop-down menu.

Step 2

You will be directed to the Executive Roles page, where you can view a list of all current Executive-type roles and who holds them. To create a report, click “Filter”.

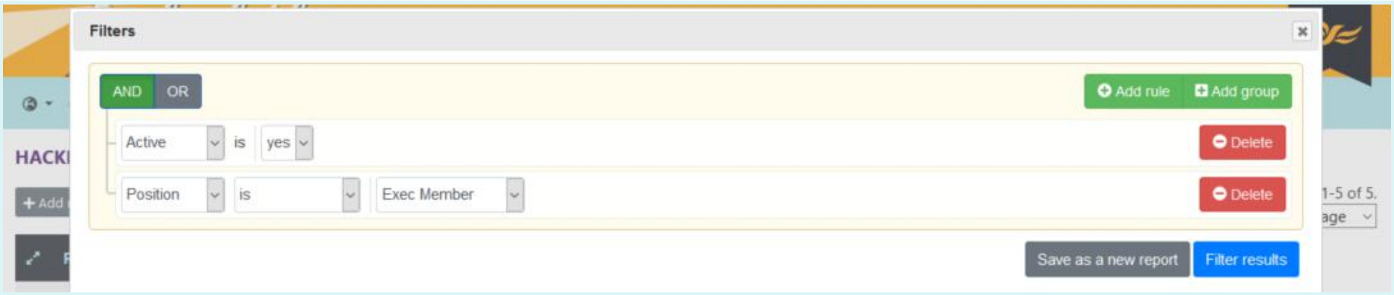


Step 3

A pop-up box will appear. You can add filters specifying:

- Whether a role is active
- The holder of a role
- The organisation associated with a role
- The name of a position

In this example, we would apply the filters below to view current ordinary executive members:

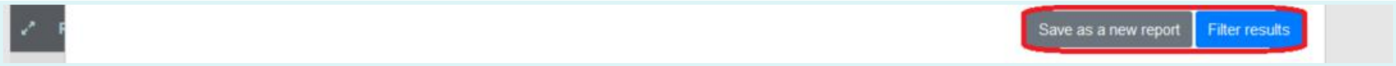


Active is yes

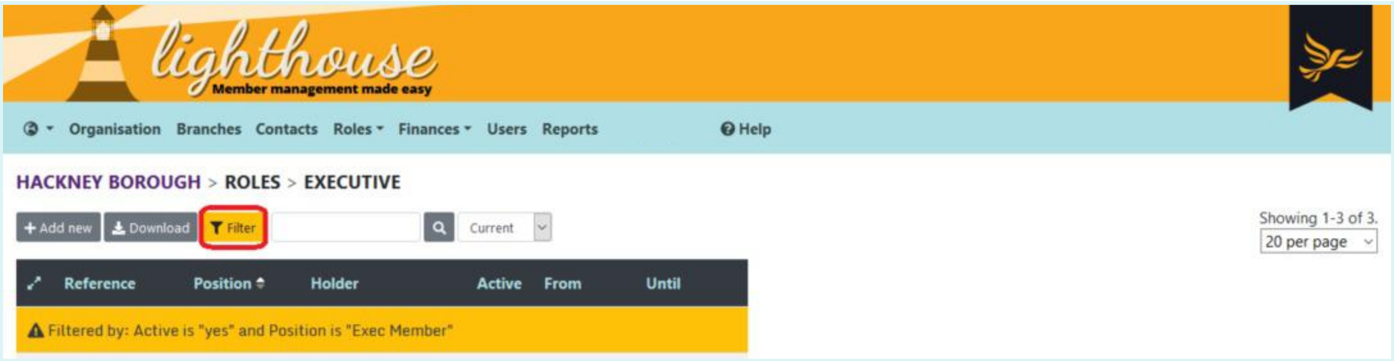
Position is Exec Member

Step 4

You can then view a filtered list of your member roles by clicking “filter results”, or save the report for later by clicking “Save as a new report”. You can view saved reports in the “Reports” tab - click here to find out more. You will then need to complete the same process outlined here to name your report and confirm its settings.



As with contact reports, if you decide after viewing your results that you would like to change your filters, click “Filter” at the top of the screen to edit the report.



Filtered by: Active is "yes" and Position is "Exec Member"

Managing your reports

What you will learn in this section

Permissions needed

- How to view your saved reports

	View	Edit	Create
Reports	✓		
Data types used in report	✓		

- How to edit your saved reports

	View	Edit	Create
Reports	✓	✓	
Data types used in reports	✓		

- How to filter your saved reports

	View	Edit	Create
Reports	✓		
Data types used in reports	✓		

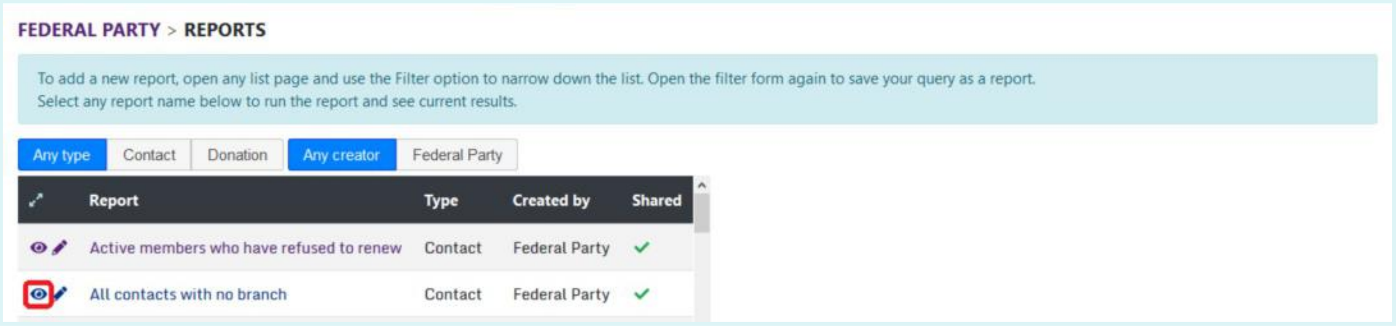
How to view your saved reports

Step 1

After logging into Lighthouse, you will be directed to the Dashboard page. Click on “Reports” in the blue menu at the top.

Step 2

You will be directed to the Reports page, where you will see a list of your saved reports. To view a report, click on the eye icon to the left of the report name.



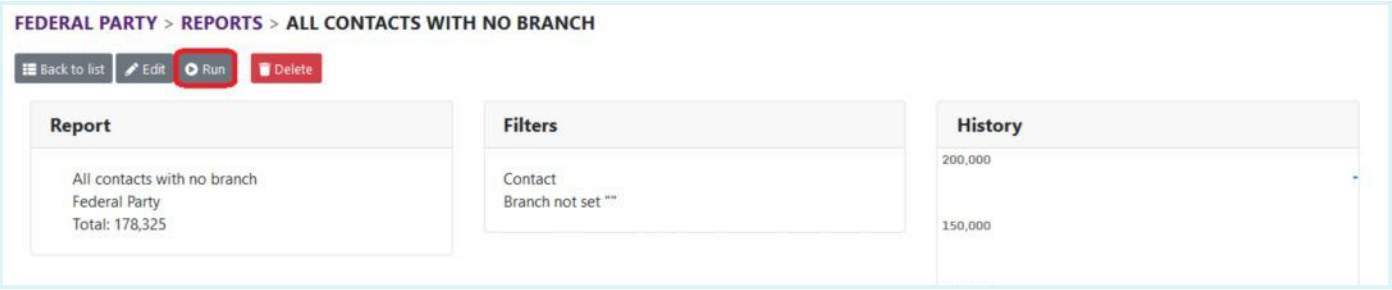
To add a new report, open any list page and use the Filter option to narrow down the list. Open the filter form again to save your query as a report.
Select any report name below to run the report and see current results.

	Report	Type	Created by	Shared
	Active members who have refused to renew	Contact	Federal Party	✓
	All contacts with no branch	Contact	Federal Party	✓

Step 3

You will be directed to the details page for your chosen report. Here you can view information about how many records appear in the report, what the filters are, and a history graph showing how the metrics in your report have changed over time.

To view the records in your chosen report, click “Run”. Your report will appear as a filtered list of contacts, member roles, donations, pledges, loans or election expenses.



Report

All contacts with no branch
Federal Party
Total: 178,325

Filters

Contact
Branch not set ""

History

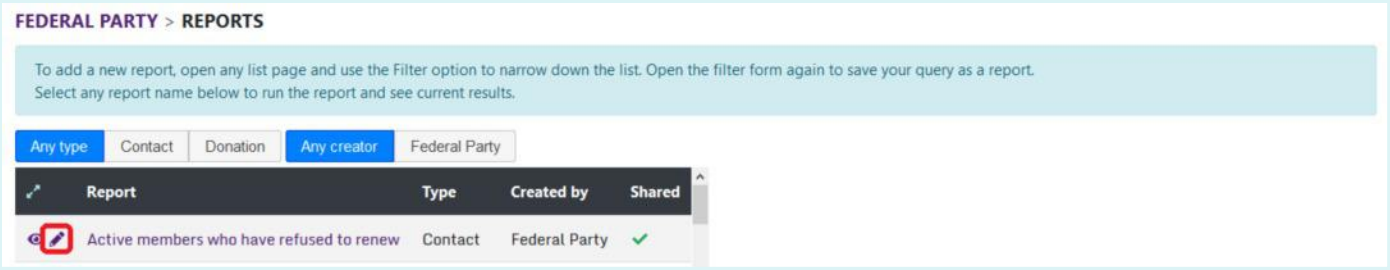
How to edit your saved reports

Step 1

After logging into Lighthouse, you will be directed to the Dashboard page. Click on “Reports” in the blue menu at the top.

Step 2

You will be directed to the Reports page, where you will see a list of your saved reports. To edit a report, click on the pencil icon to the left of the report name.



FEDERAL PARTY > REPORTS

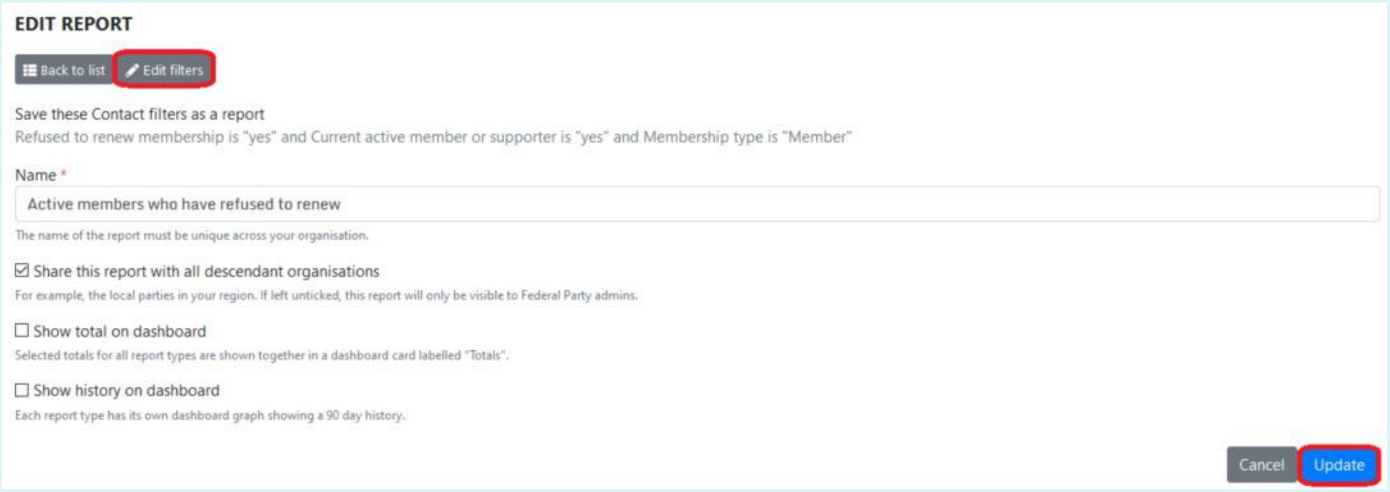
To add a new report, open any list page and use the Filter option to narrow down the list. Open the filter form again to save your query as a report.
Select any report name below to run the report and see current results.

Report	Type	Created by	Shared
Active members who have refused to renew	Contact	Federal Party	✓

Note that you can also edit a report by clicking on the eye icon to the left of the pencil icon. This will take you to the details page for your chosen report - click on “Edit” at the top-left of the page.

Step 3

You will be taken to the page where you can edit the name and settings for your chosen report. To edit the report filters themselves, click “Edit filters” and follow steps 3 - 5 set out here.



EDIT REPORT

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

Name *
Active members who have refused to renew
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.

When you have finished editing, click “Update report” and you will be directed to the details page for your chosen report.

How to filter your saved reports

Step 1

After logging into [Lighthouse](), you will be directed to the Dashboard page. Click on “Reports” in the blue menu at the top.

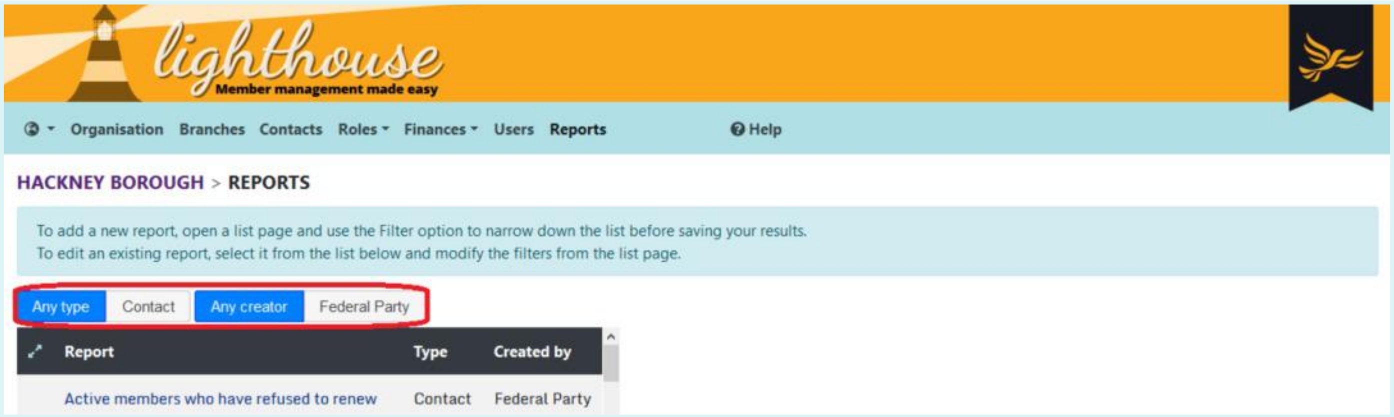
HACKNEY BOROUGH

Step 2

You will be directed to the Reports page, where you will see a list of your saved reports. You will see buttons above the list of reports, which enable you to filter the list. You can filter by:

- The type of report - e.g. contacts, member roles, donations, loans, election expenses
- The creator of the report - e.g. any creator, LDHQ, your local party

Click the buttons which correspond to the options you would like to choose. A filtered list will appear, from which you can view, edit or download reports as usual.



HACKNEY BOROUGH > REPORTS

To add a new report, open a list page and use the Filter option to narrow down the list before saving your results.
To edit an existing report, select it from the list below and modify the filters from the list page.

Report	Type	Created by
Active members who have refused to renew	Contact	Federal Party

Downloading data from Lighthouse

What you will learn in this section

- How to download data from Lighthouse

How to download data from Lighthouse

When you are using Lighthouse, you may notice that some pages offer the option to download the data shown on the screen.

The table below explains the types of information you can download. Note that all downloads will be in Excel and CSV format.

Page	Downloadable data
Branches	Local branches, including membership statistics for each one
Contacts	Members, supporters and donors, including contact and membership details
Roles	Local member roles, including their position and term of office
Donations	Donations you have received, including the source, amount and type of donation
Loans	Your local party's loans, including lender information and financial details
Donation returns	Your local party's PPERA returns, including donation details and declarations
Election expenses	Your local party's election expenses, including invoice and approval details
Membership rebates	Your local party's membership rebates and deductions
Users	Local Lighthouse users, including their user permission levels
Reports	Saved contact, member role, donation, loan and election expense reports

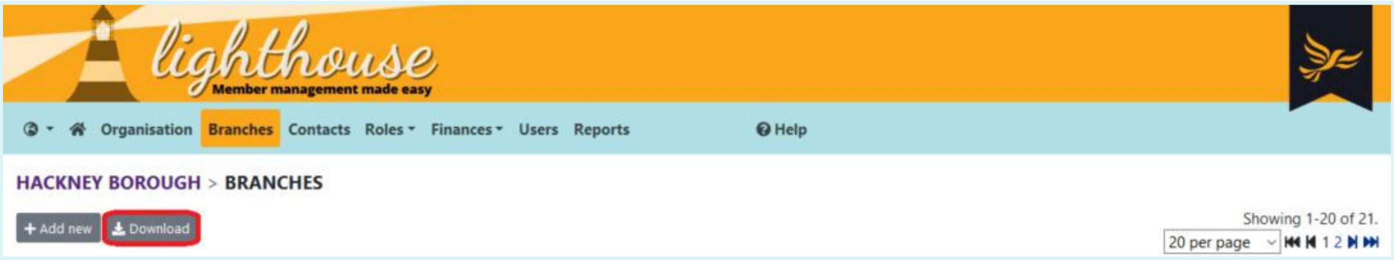
This guide will use a download of Branches data as an example. However, the process for downloading all the types of data listed above will be identical to this.

Step 1

After logging into Lighthouse, you will be directed to the Dashboard page. From here, click on "Branches" in the blue menu at the top.

Step 2

You will be directed to the Branches page. Here you can see a list of all your local branches, as well as membership statistics for each one. To download this information, click “Download” at the top left of the page. Note that you can download data any time you see this button in Lighthouse.



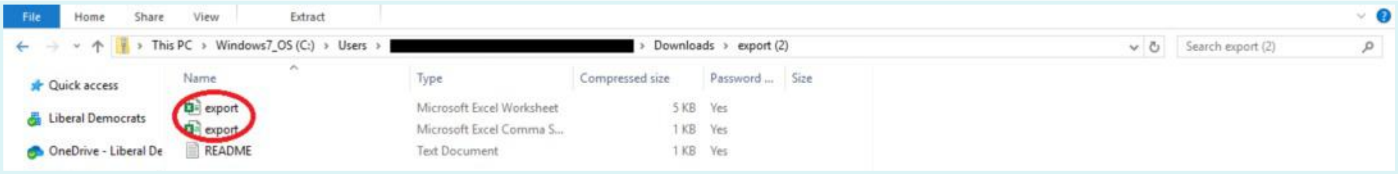
HACKNEY BOROUGH > BRANCHES

Showing 1-20 of 21.

Step 3

Locate the downloaded file in the file explorer on your computer. It is likely to have been downloaded to the “My Downloads” folder unless you have changed this option in your browser settings, and will be named “export.zip”.

Double click to open the zipped folder, and you will see three files - an Excel spreadsheet, a CSV file, and a text README file. Note that if your download contains a very large amount of data, you may not receive the Excel file.

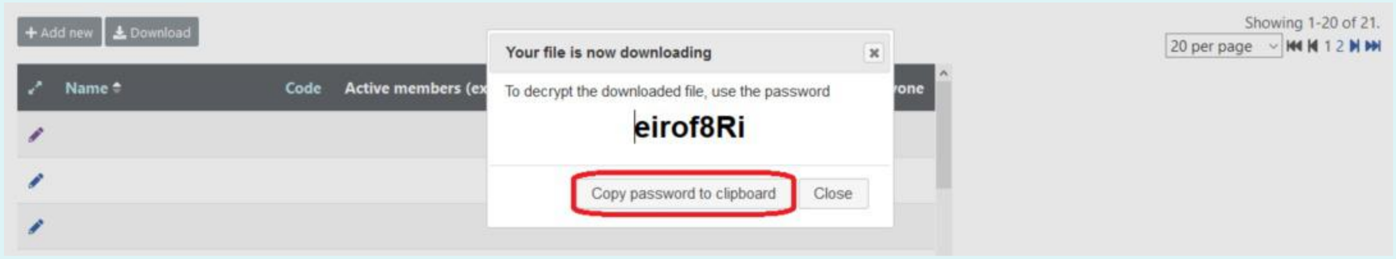


This PC > Windows7_OS (C:) > Users > [redacted] > Downloads > export (2)

Name	Type	Compressed size	Password ...	Size
export	Microsoft Excel Worksheet	5 KB	Yes	
export	Microsoft Excel Comma S...	1 KB	Yes	
README	Text Document	1 KB	Yes	

Step 4

Due to the personal nature of the data being handled by Lighthouse, you will be asked to enter a password when you open the data file. In order to find the password, return to your browser. The password for your files will have appeared in a pop-up box on the screen, along with a button to copy it. Paste the password when prompted and you will be able to view your downloaded data.



Showing 1-20 of 21.

Your file is now downloading

To decrypt the downloaded file, use the password

eirof8Ri

5 - Managing users

Last updated: May 2020

What you will learn in this chapter

- How to manage your local Lighthouse users

Useful resources

- User permissions

How to manage your local Lighthouse users

What you will learn in this guide

- How to view a list of your local Lighthouse users
- How to add new Lighthouse users
- How to edit your local Lighthouse users

Permissions needed

	View	Edit	Create
Users	✓		

	View	Edit	Create
Users	✓	✓	✓

	View	Edit	Create
Users	✓	✓	

How to view a list of your local Lighthouse users

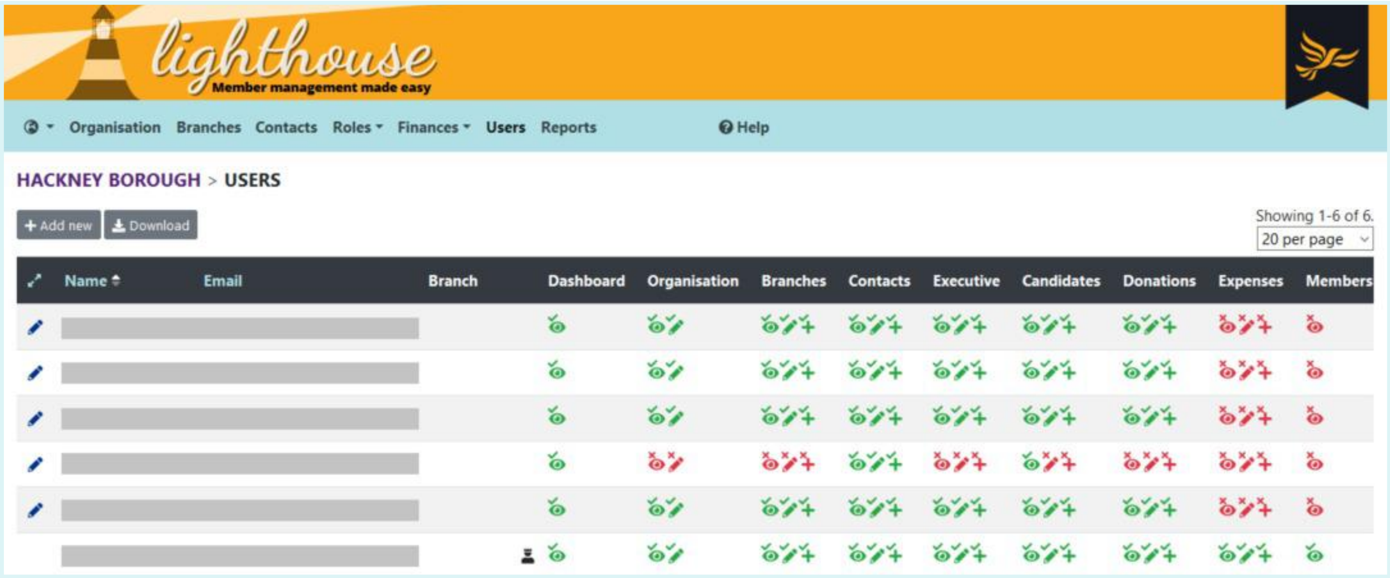
Step 1

After logging into Lighthouse, you will be directed to the Dashboard page. Click on “Users” in the blue menu at the top of the page.

Step 2

You will be directed to the Users page, where you can view a list of all Lighthouse users in your local party, as well as their permission levels - i.e. which areas of Lighthouse they can view, which records they can edit, and whether they can create contacts, branches or other types of records.

If you’d like to know more about what each of the different permission levels mean, and which levels are suggested for different types of Lighthouse users, click here.



⤢	Name	Email	Branch	Dashboard	Organisation	Branches	Contacts	Executive	Candidates	Donations	Expenses	Members
✎	[redacted]	[redacted]		👁✓	👁✓ ✎✓	👁✓ ✎✓ +✓	👁✓ ✎✓ +✓	👁✓ ✎✓ +✓	👁✓ ✎✓ +✓	👁✓ ✎✓ +✓	👁✗ ✎✗ +✗	👁✗
✎	[redacted]	[redacted]		👁✓	👁✓ ✎✓	👁✓ ✎✓ +✓	👁✓ ✎✓ +✓	👁✓ ✎✓ +✓	👁✓ ✎✓ +✓	👁✓ ✎✓ +✓	👁✗ ✎✗ +✗	👁✗
✎	[redacted]	[redacted]		👁✓	👁✓ ✎✓	👁✓ ✎✓ +✓	👁✓ ✎✓ +✓	👁✓ ✎✓ +✓	👁✓ ✎✓ +✓	👁✓ ✎✓ +✓	👁✗ ✎✗ +✗	👁✗
✎	[redacted]	[redacted]		👁✓	👁✗ ✎✗	👁✗ ✎✗ +✗	👁✓ ✎✓ +✓	👁✗ ✎✗ +✗	👁✓ ✎✗ +✗	👁✗ ✎✗ +✗	👁✗ ✎✗ +✗	👁✗
✎	[redacted]	[redacted]		👁✓	👁✓ ✎✓	👁✓ ✎✓ +✓	👁✓ ✎✓ +✓	👁✓ ✎✓ +✓	👁✓ ✎✓ +✓	👁✓ ✎✓ +✓	👁✗ ✎✗ +✗	👁✗
	[redacted]	[redacted]	👤	👁✓	👁✓ ✎✓	👁✓ ✎✓ +✓	👁✓ ✎✓ +✓	👁✓ ✎✓ +✓	👁✓ ✎✓ +✓	👁✓ ✎✓ +✓	👁✓ ✎✓ +✓	👁✓

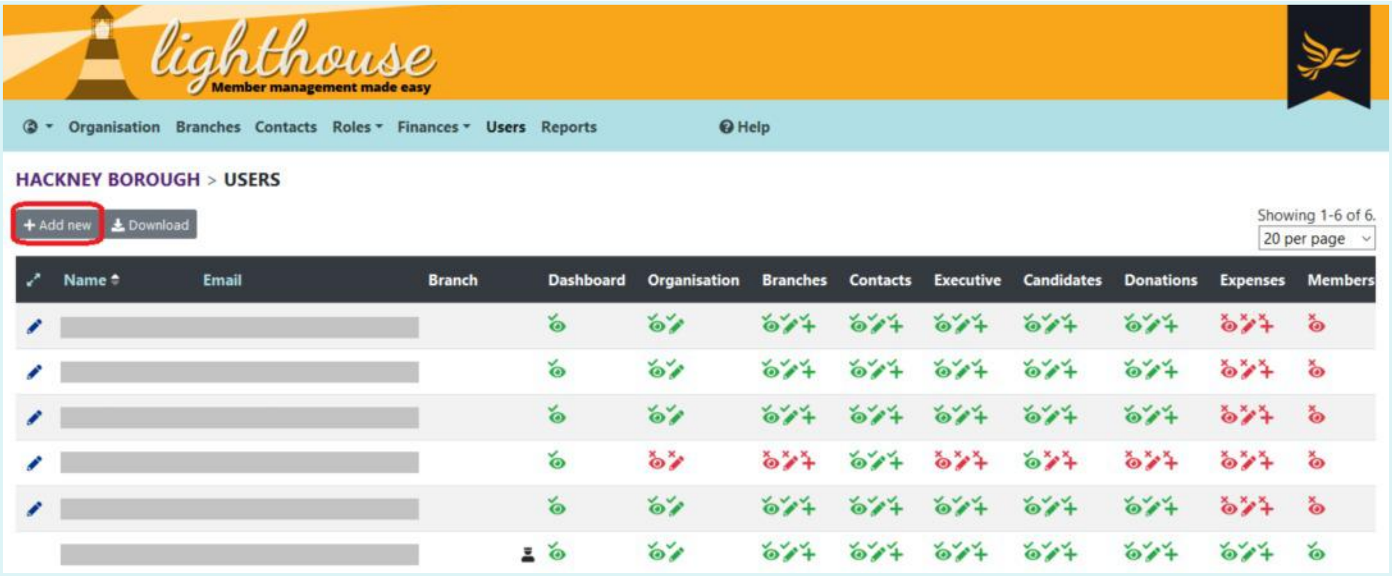
How to add new Lighthouse users

Step 1

After logging into Lighthouse, you will be directed to the Dashboard page. Click on "Users" in the blue menu to view a list of your current Lighthouse users.

Step 2

To add a new user, click "Add new" at the top-left of the page.

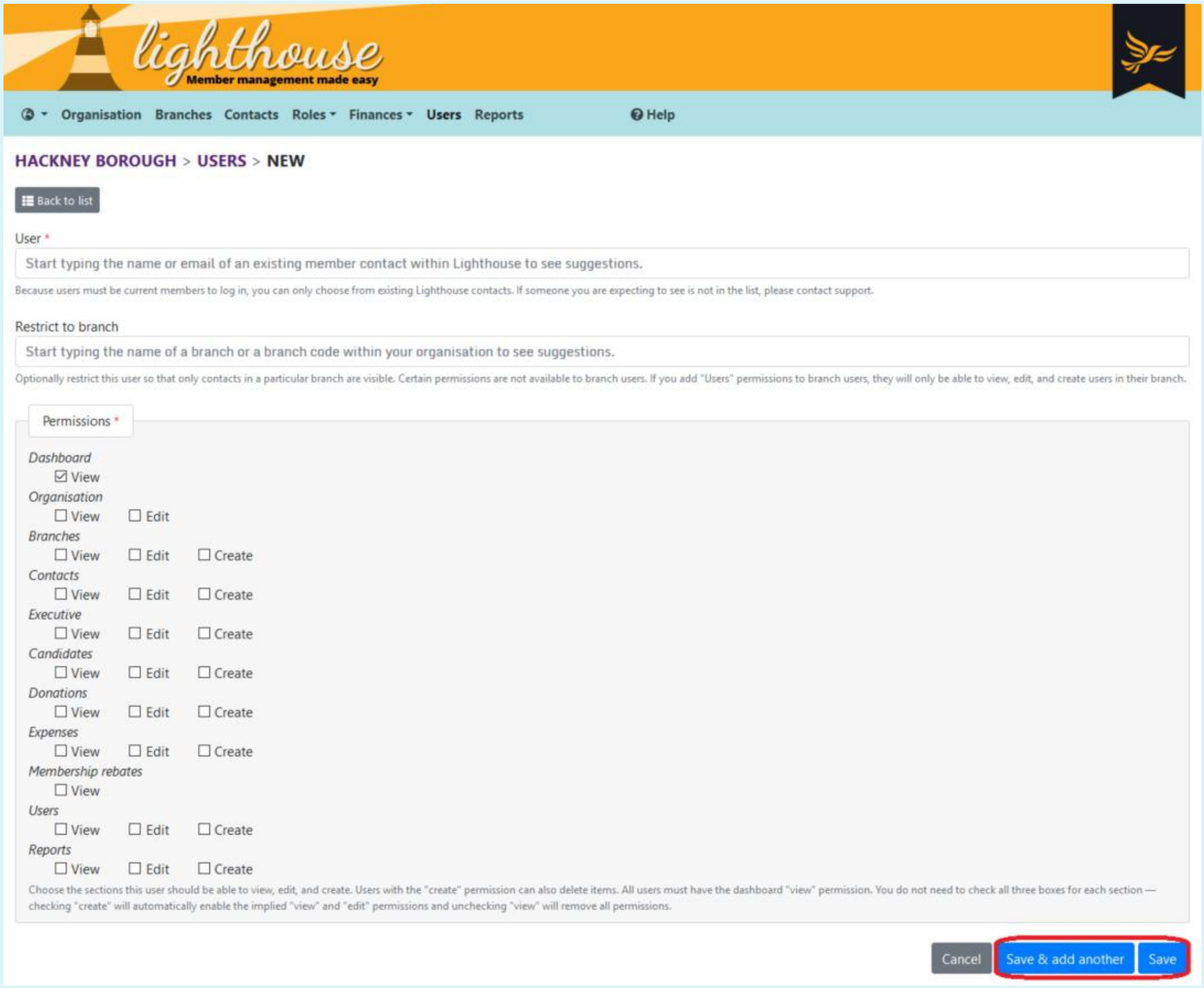


Step 3

You will be directed to the New User page. Start by typing in the name of the contact you want to add as a user into the first search box, and a list of options from your existing contacts will appear. Click on the correct contact, and their name, membership number and address will appear below the search box.

You can also follow this step to restrict the new user to viewing one or more branches. Type the name of the branch into the second search box, and click on the correct one.

You can then set the permissions for the new user using the checkboxes further down the page.



HACKNEY BOROUGH > USERS > NEW

User *

Start typing the name or email of an existing member contact within Lighthouse to see suggestions.

Because users must be current members to log in, you can only choose from existing Lighthouse contacts. If someone you are expecting to see is not in the list, please contact support.

Restrict to branch

Start typing the name of a branch or a branch code within your organisation to see suggestions.

Optionally restrict this user so that only contacts in a particular branch are visible. Certain permissions are not available to branch users. If you add "Users" permissions to branch users, they will only be able to view, edit, and create users in their branch.

Permissions *

Dashboard
☑ View
Organisation
☐ View ☐ Edit
Branches
☐ View ☐ Edit ☐ Create
Contacts
☐ View ☐ Edit ☐ Create
Executive
☐ View ☐ Edit ☐ Create
Candidates
☐ View ☐ Edit ☐ Create
Donations
☐ View ☐ Edit ☐ Create
Expenses
☐ View ☐ Edit ☐ Create
Membership rebates
☐ View
Users
☐ View ☐ Edit ☐ Create
Reports
☐ View ☐ Edit ☐ Create

Choose the sections this user should be able to view, edit, and create. Users with the "create" permission can also delete items. All users must have the dashboard "view" permission. You do not need to check all three boxes for each section — checking "create" will automatically enable the implied "view" and "edit" permissions and unchecking "view" will remove all permissions.

When you are finished, click “Save” at the bottom of the page.

Step 4

You will be returned to the Users page, where you can view your updated list. Your contact will soon receive an email welcoming them to Lighthouse and instructing them on how to log in.

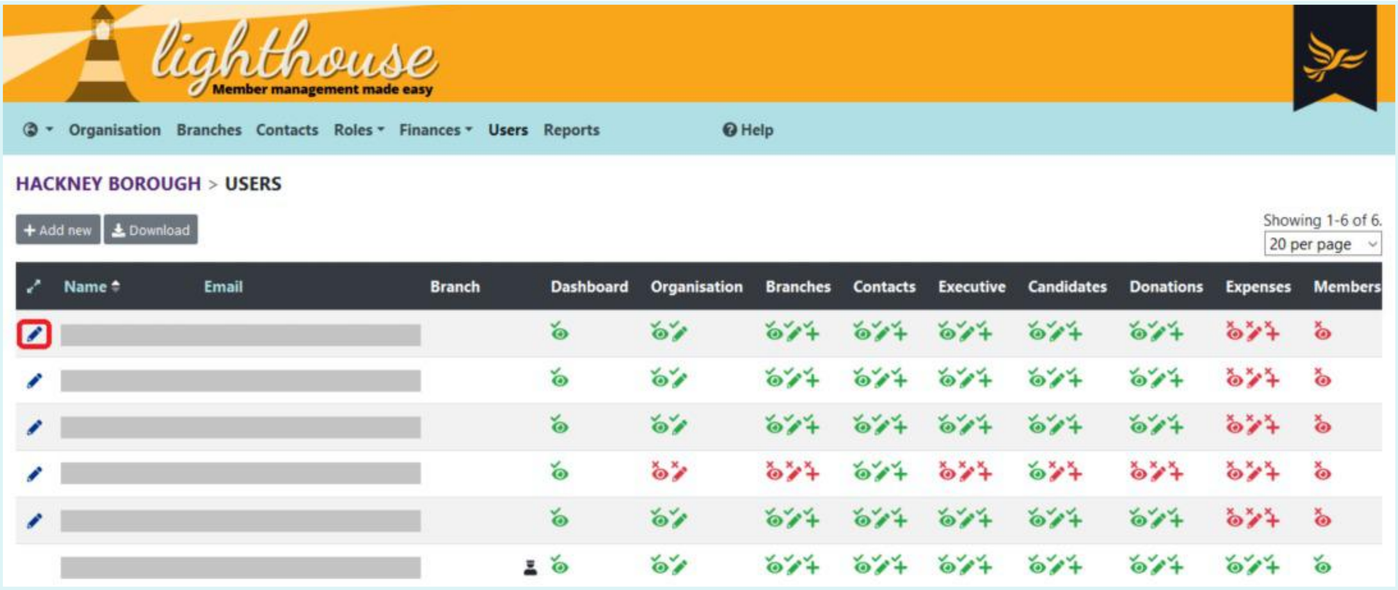
How to edit your local Lighthouse users

Step 1

After logging into Lighthouse, you will be directed to the Dashboard page. Click on “Users” in the blue menu to view a list of your current Lighthouse users.

Step 2

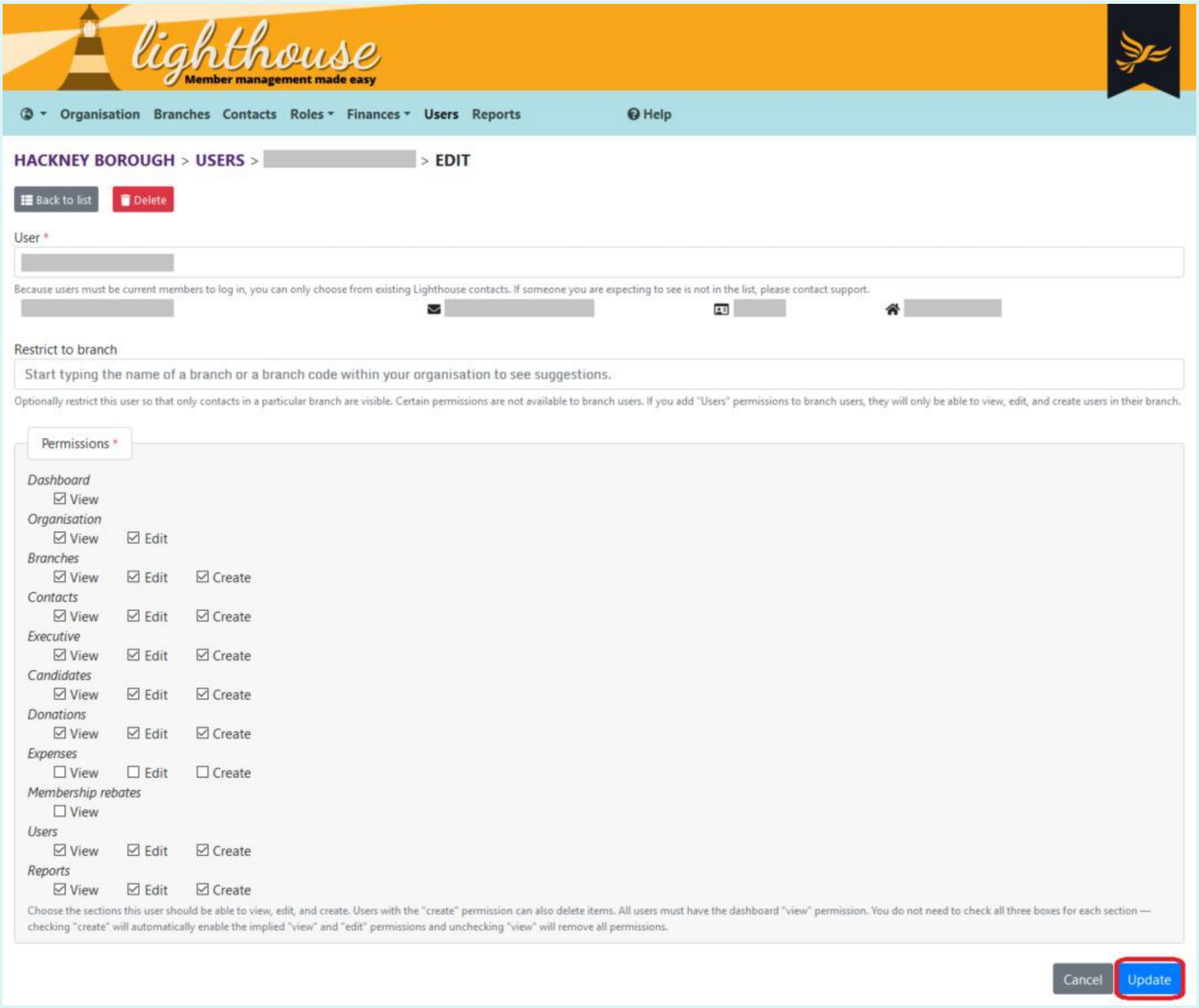
To edit an existing Lighthouse user, click the pencil icon next to their name in the list.



Note that you can also click on the name of the contact, and then click “Edit” at the top-left of the page.

Step 3

You will be directed to the Edit page, where you can restrict this user to a branch and amend their user positions.



User *

[redacted]

Because users must be current members to log in, you can only choose from existing Lighthouse contacts. If someone you are expecting to see is not in the list, please contact support.

[redacted] ✉ [redacted] [redacted] [redacted]

Restrict to branch

Start typing the name of a branch or a branch code within your organisation to see suggestions.

Optionally restrict this user so that only contacts in a particular branch are visible. Certain permissions are not available to branch users. If you add "Users" permissions to branch users, they will only be able to view, edit, and create users in their branch.

Permissions *

Dashboard
☑ View
Organisation
☑ View ☑ Edit
Branches
☑ View ☑ Edit ☑ Create
Contacts
☑ View ☑ Edit ☑ Create
Executive
☑ View ☑ Edit ☑ Create
Candidates
☑ View ☑ Edit ☑ Create
Donations
☑ View ☑ Edit ☑ Create
Expenses
☐ View ☐ Edit ☐ Create
Membership rebates
☐ View
Users
☑ View ☑ Edit ☑ Create
Reports
☑ View ☑ Edit ☑ Create

Choose the sections this user should be able to view, edit, and create. Users with the "create" permission can also delete items. All users must have the dashboard "view" permission. You do not need to check all three boxes for each section — checking "create" will automatically enable the implied "view" and "edit" permissions and unchecking "view" will remove all permissions.

Once you are happy with your changes, click "Update" at the bottom of the page. You will be directed back to the Users list.

6 - Managing member roles

Last updated: May 2020

What you will learn in this chapter

- How to view current and previous member roles
- How to create and edit member roles

Useful resources

- How to find candidates in Lighthouse

How to view current and previous member roles

What you will learn in this guide

- How to view current member roles

- How to view previous member roles

Permissions needed

	View	Edit	Create
Executive	✓		

	View	Edit	Create
Executive	✓		

How to view current member roles

Step 1

After logging into Lighthouse, you will be directed to the Dashboard page. Click on “Roles” in the blue menu bar at the top.

HACKNEY BOROUGH

Step 2

A drop-down menu will appear with three options - Executive, Officers and Other. Click on the one which reflects the types of roles you want to view.

The table below outlines which roles appear under each of these options.

Executive	**Officers**	**Other**
Events Officer	Chair / Convener	Constituency Organiser
Exec Member	Data Officer	Councillor
Fundraising Officer	Diversity Officer	Facebook Group Admin
Honorary President	Membership Development Officer	Lighthouse User
Parliamentary Spokesperson	Membership Secretary	Staff
Press Officer	Secretary	Trainer
Youth and Student Officer	Treasurer	(And many more)
	Vice-Chairperson	

Step 3

You will be directed to the Roles page, where a list of people holding your specified type of role will be displayed in a list.

How to view previous member roles

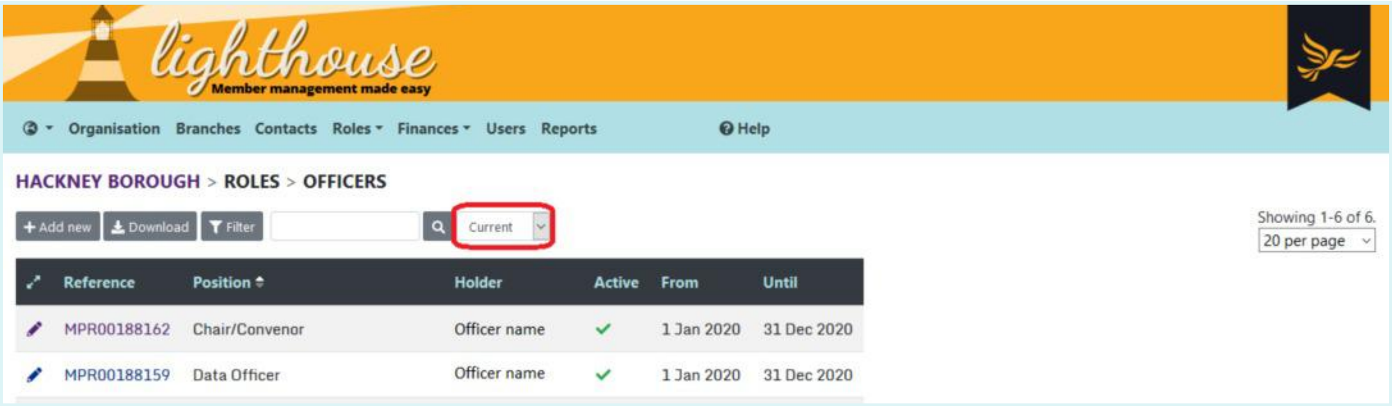
Step 1

After logging into Lighthouse, you will be directed to the Dashboard page. Click on “Roles” and follow the steps set out under How to view current member roles to choose the types of roles you would like to display.

Step 2

A list of the current members holding the selected type of role will appear. In the example shown below, you can see a list of current officers in the Hackney local party.

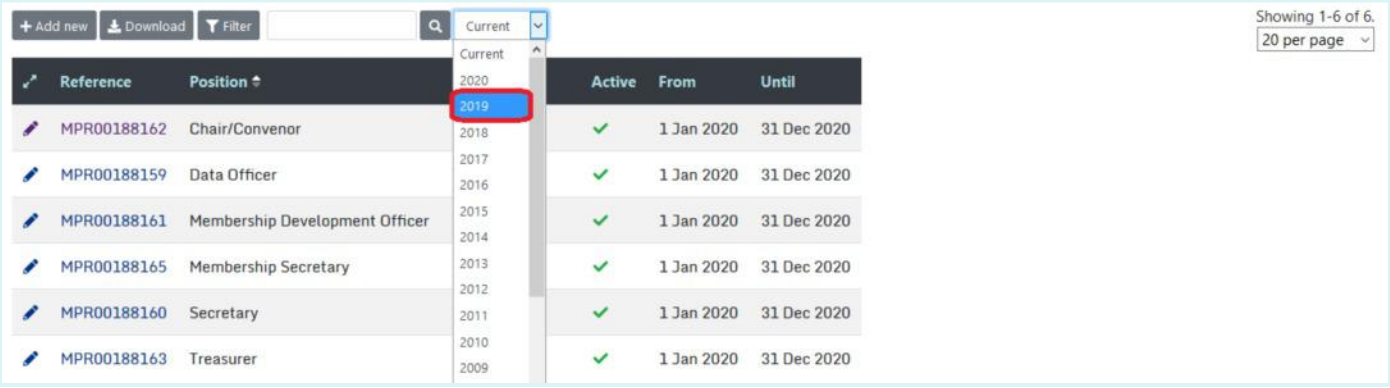
To view previous years’ officers, click on the button above the “Holder” column, which by default will be set to “Current”.



Reference	Position	Holder	Active	From	Until
MPR00188162	Chair/Convenor	Officer name	✓	1 Jan 2020	31 Dec 2020
MPR00188159	Data Officer	Officer name	✓	1 Jan 2020	31 Dec 2020

Step 3

A drop-down list of previous years will appear. Click on the year you would like to view.



Reference	Position	Active	From	Until
MPR00188162	Chair/Convenor	✓	1 Jan 2020	31 Dec 2020
MPR00188159	Data Officer	✓	1 Jan 2020	31 Dec 2020
MPR00188161	Membership Development Officer	✓	1 Jan 2020	31 Dec 2020
MPR00188165	Membership Secretary	✓	1 Jan 2020	31 Dec 2020
MPR00188160	Secretary	✓	1 Jan 2020	31 Dec 2020
MPR00188163	Treasurer	✓	1 Jan 2020	31 Dec 2020

A list of member roles for your chosen year will appear.

How to create and edit member roles

What you will learn in this guide

- How to create new member roles

	View	Edit	Create
Executive	✓	✓	✓

- How to edit current member roles

	View	Edit	Create
Executive	✓	✓	

Permissions needed

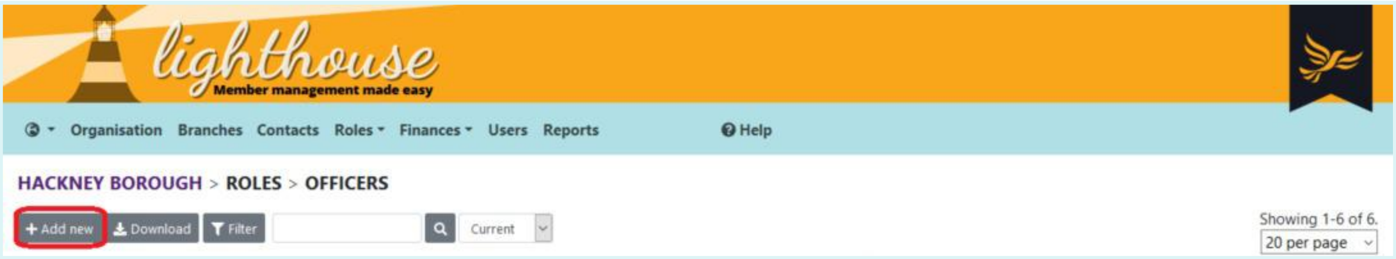
How to create new member roles

Step 1

After logging into Lighthouse, you will be directed to the Dashboard page. Click on “Roles” and follow the steps set out under How to view current member roles to choose the types of role you would like to create.

Step 2

A list of the current members holding the selected type of role will appear. To create a new member role, click “Add new” above the list.



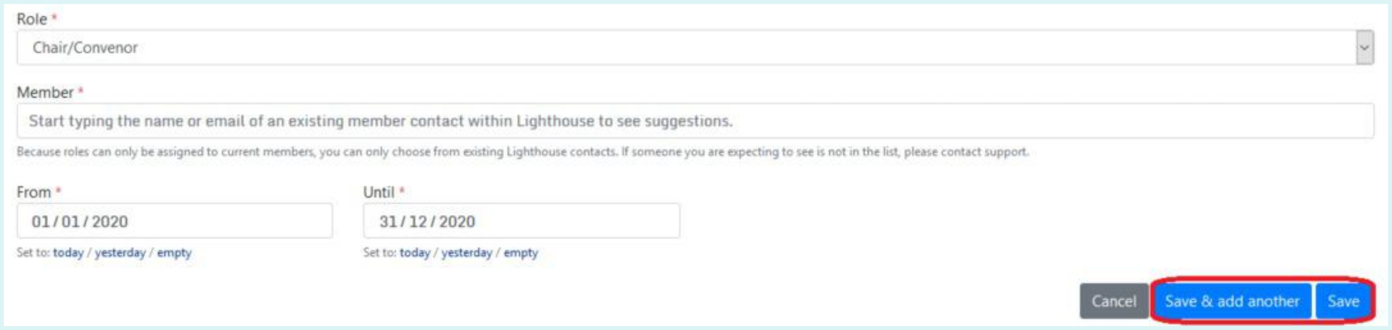
HACKNEY BOROUGH > ROLES > OFFICERS

Showing 1-6 of 6.

Step 3

You will be directed to the “New role” page. Click into the first drop-down menu to select the name of the role you are filling. Next, start typing the name of the new role-holder into the field next to “Contact”. Lighthouse will show a list of your current contacts as you type - click on one of these to select them.

Finally, type in the dates of their term of office into the “From” and “Until” fields. Alternatively, mouse over the two fields and click on the single downward arrow which appears at the far right end of the box to select a date from the calendar.



Role *
Chair/Convenor

Member *
Start typing the name or email of an existing member contact within Lighthouse to see suggestions.
Because roles can only be assigned to current members, you can only choose from existing Lighthouse contacts. If someone you are expecting to see is not in the list, please contact support.

From *
01 / 01 / 2020
Set to: today / yesterday / empty

Until *
31 / 12 / 2020
Set to: today / yesterday / empty

When you are finished, click “Save”. You will be directed back to the Roles page, where you can view your newly-added role. Alternatively, if you’d like to add another role, click “Save and add another”.

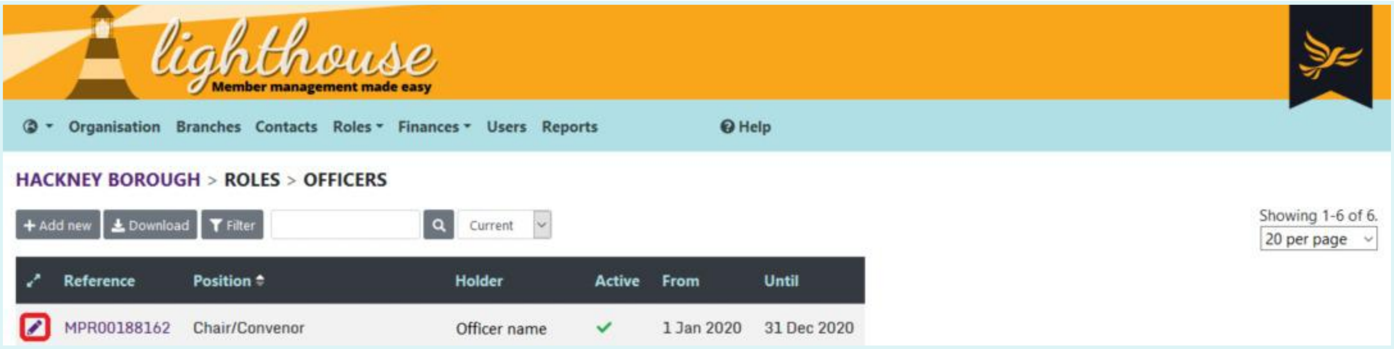
How to edit current member roles

Step 1

After logging into Lighthouse, you will be directed to the Dashboard page. Click on “Roles” and follow the steps set out under How to view current member roles to choose the types of roles you would like to display.

Step 2

A list of the current members holding the selected type of role will appear. To edit an existing member role, click on the pencil icon next to the member’s name.



HACKNEY BOROUGH > ROLES > OFFICERS

Showing 1-6 of 6.

Reference	Position	Holder	Active	From	Until
MPR00188162	Chair/Convenor	Officer name	✓	1 Jan 2020	31 Dec 2020

Step 3

You will be directed to the Edit page. Type in the new end date into the box on the left hand side of the screen, or alternatively click on the single downward facing icon at the far right end of the date field to select a new end date from the calendar.

When you are finished, click Update.

HACKNEY BOROUGH > ROLES > OFFICERS > MEMBER NAME > EDIT

Until *
31 / 12 / 2020
Set to: today / yesterday

You will be returned to the Roles page, where you can view the edited role in the list.

7 - Managing finances

Last updated: April 2020

What you will learn in this chapter

- How to manage donations
- How to manage loans
- How to manage pledges
- How to submit PPERA returns
- How to submit election expenses

Useful resources

- Membership rebates

Managing donations

What you will learn in this section

- How to view your donations

	View	Edit	Create
Donations	✓		

- How to record new donations

	View	Edit	Create
Donations	✓	✓	✓
Contacts	✓	✓	✓

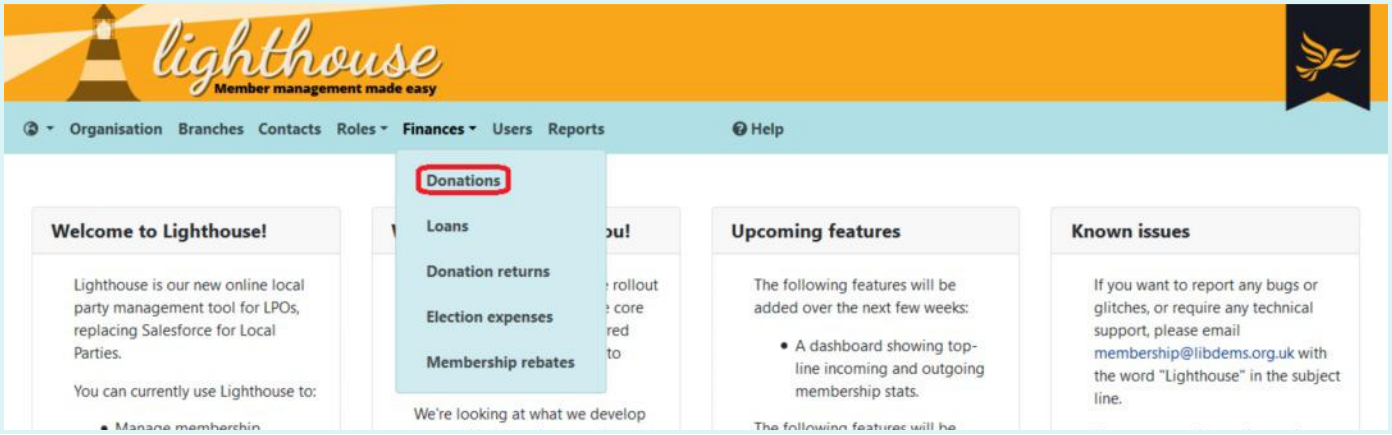
- How to edit existing donations

	View	Edit	Create
Donations	✓	✓	

How to view your donations

Step 1

After logging into Lighthouse, you will be directed to the Dashboard page. Click on “Finances” in the blue menu at the top; then select “Donations” from the drop-down menu which appears.



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

You can currently use Lighthouse to:

We're looking at what we develop

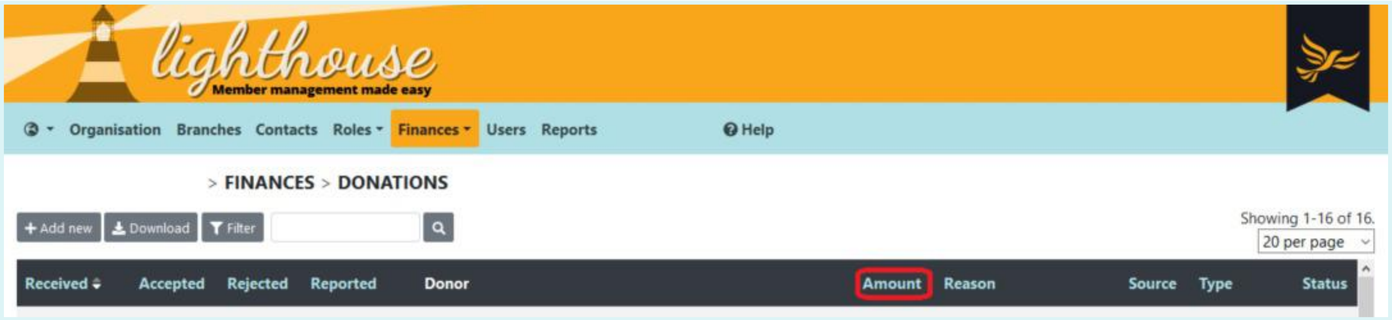
The following features will be added over the next few weeks:

- A dashboard showing top-line incoming and outgoing membership stats.

If you want to report any bugs or glitches, or require any technical support, please email membership@libdems.org.uk with the word "Lighthouse" in the subject line.

Step 2

You will be directed to the Donations page, where you can view a list of your donations in chronological order alongside details of the amount donated, source, reason, and status of the donation. Click on any of the blue column headers to sort the data according to that field. For example, you could sort your donations in order of size by clicking the “Amount” header.



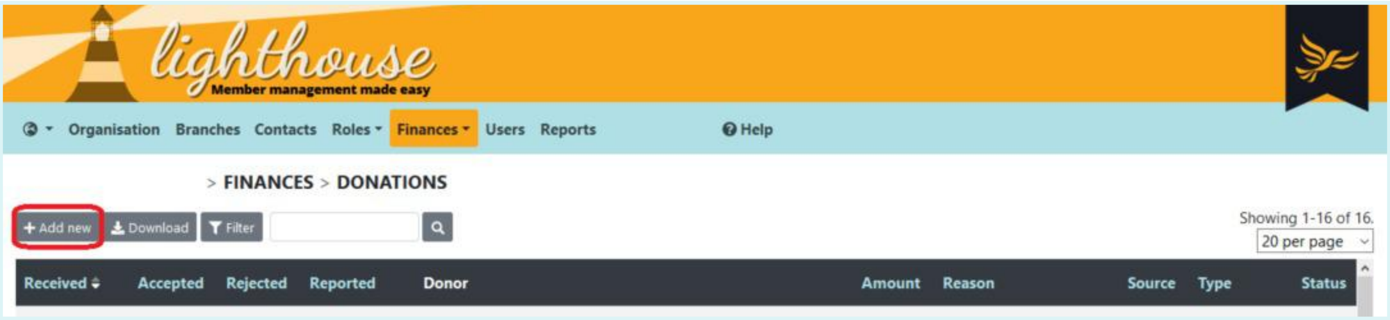
How to record new donations

Step 1

After logging into Lighthouse, you will be directed to the Dashboard page. Click on "Finances" in the blue menu at the top; then select "Donations" from the drop-down menu which appears.

Step 2

You will be directed to the Donations page. To add a new donation, click "Add new" at the top left of the screen.

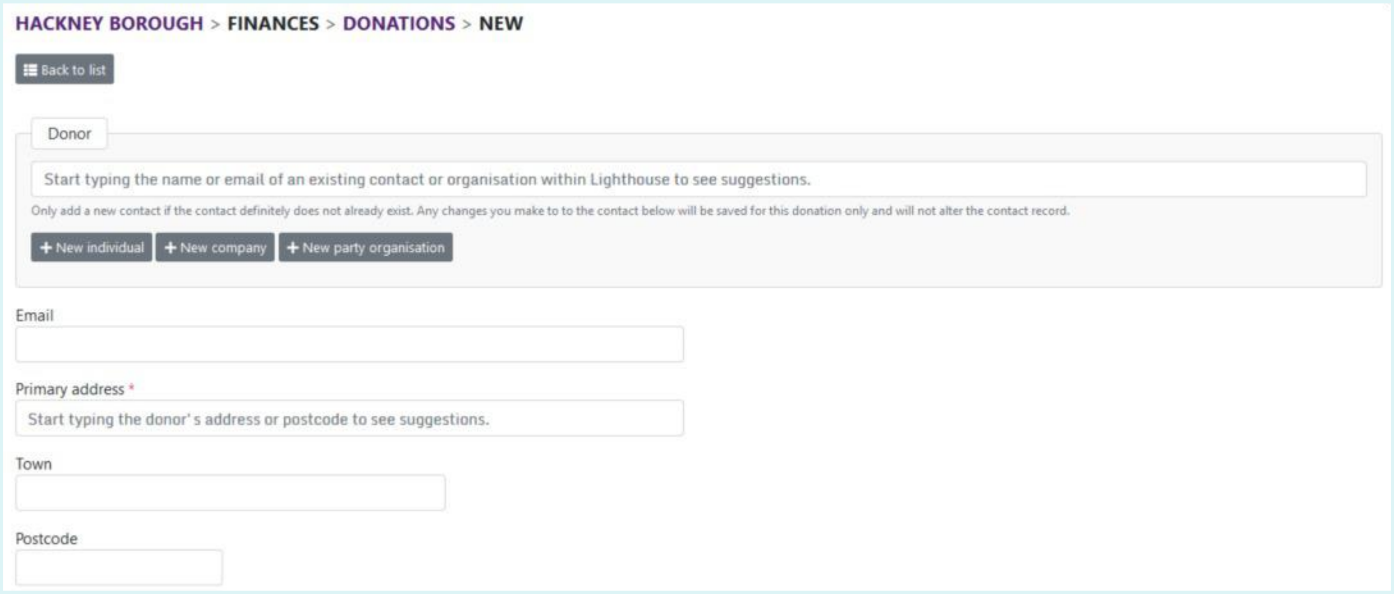


Step 3

You will be directed to the "New Donation" page. Here you will need to fill in some details to ensure the donation is recorded accurately.

To get started, begin typing the name of an individual, company or party organisation in the first field. If they are already a contact in Lighthouse, the name will appear automatically below the "name" field. Click on this to choose your donor, and their contact details will be automatically filled in in the fields below.

If the donor is not already a contact in Lighthouse, you can click on one of the three buttons below the "name" field to add a new individual, company or party organisation. Note that you will need contact details for the relevant individual to hand, and, in the case of company donations, the business' registration number as listed at Companies House.



HACKNEY BOROUGH > **FINANCES** > **DONATIONS** > **NEW**

Start typing the name or email of an existing contact or organisation within Lighthouse to see suggestions.

Only add a new contact if the contact definitely does not already exist. Any changes you make to to the contact below will be saved for this donation only and will not alter the contact record.

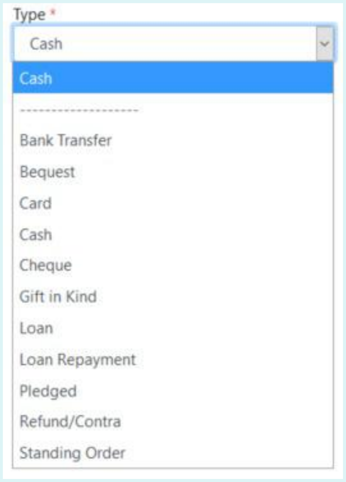
Start typing the donor' s address or postcode to see suggestions.

Step 4

Look up the donor’s electoral number (if applicable) in Connect, then copy and paste it in to the “Electoral number” field.

You can look up this number in Connect.

Step 5



Next, you will need to choose the type of donation you received. This is the form the donation took - such as cash, standing order, cheque, bank transfer or gift in kind. For PPERA donations you should only select cash, bequest or gift in kind.

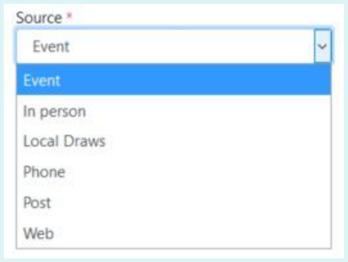
Make sure you do not choose one of the following options:

- Loan
- Loan repayment
- Pledged
- Refund / contra

Step 6

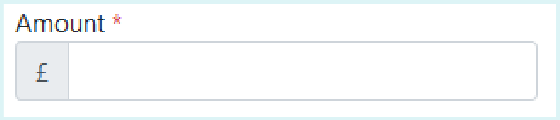
Next, you will need to choose the source of the donation.

This essentially means where the donation has come from, as you will see from the drop-down list that appears for this field.



Step 7

Next, input the amount of money - or approximate value in the case of a gift - in the “amount “ field.



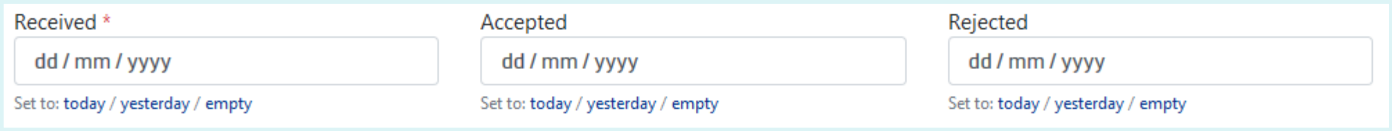
Step 8

Your next step is to note the dates the donation was received, whether it was approved or rejected, and when this took place. For “Date received”, simply type in (or choose from the drop-down calendar menu) the date on which the donation was received.

If you wish to accept the donation, type the date it was accepted in the box under “Accepted”. This might vary depending on the type of donation you’ve been given, for example:

- For cash or bank transfers, it will be the same date the donation was received
- For cheque payments, it will be the day that you cash the cheque
- For gifts in kind, it will be the date the gift was used - e.g. date an item was won in a raffle

If you wish to reject the donation, type the date it was accepted in the box under “Rejected”.

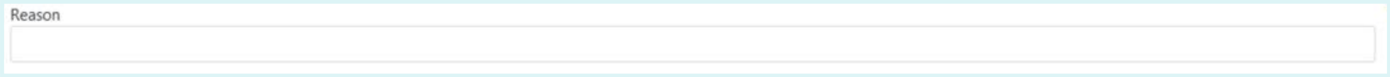


Be aware that whichever date you select for “Date accepted” will also represent the beginning of the 30 day period in which you must verify that the donation is valid.

Step 9

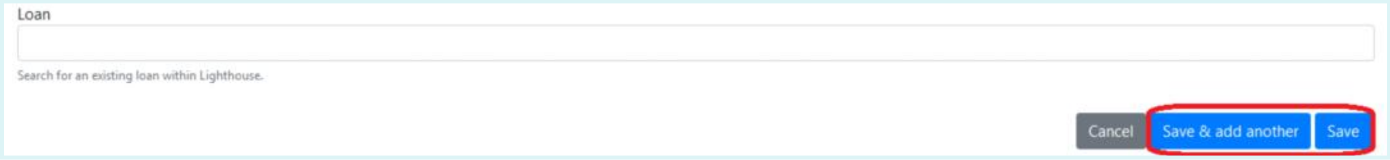
Next, note the reason for the donation. For example:

- If you received a monetary donation, which appeal or fundraising event generated it?
- If it was a gift in kind, what was the gift?


Reason

Finally, if the donation is to be put towards a loan repayment, begin typing the name of the loan into the final box on the page. This will allow you to search for and select the name of an existing loan in Lighthouse.

If you need more information about recording loans, [click here](#).


Loan

Search for an existing loan within Lighthouse.

Step 10

When you are finished, click “Save” at the bottom of the screen, or, if you have more donations to record, click “Save and add another”.

You will be returned to the Donations page. Your newly-recorded donation will not appear here straight away, as the system needs to perform a number of automated checks on the donation before displaying it. Check back in 15 minutes to view your new donation.

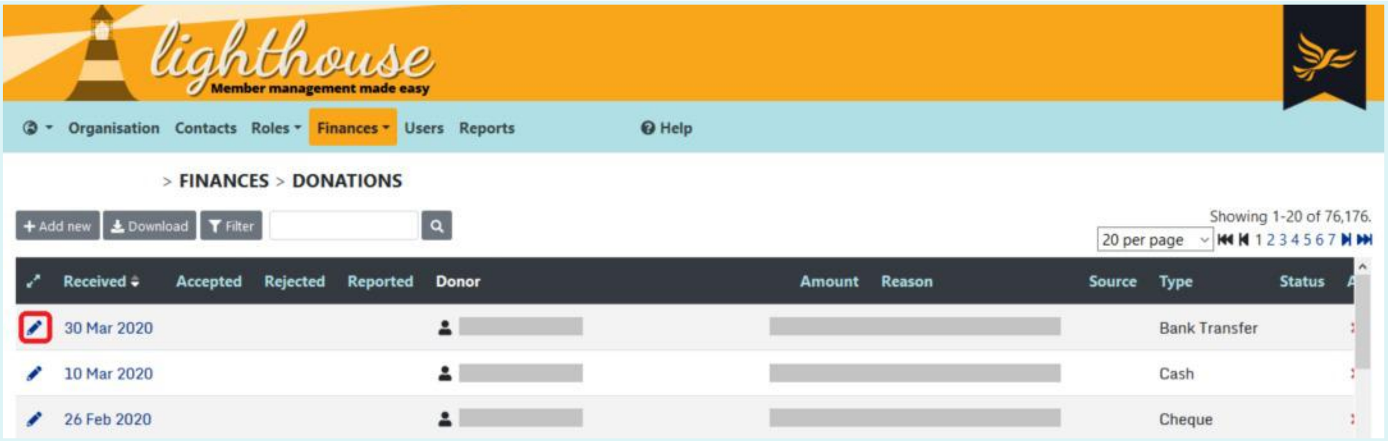
How to edit existing donations

Step 1

After logging into Lighthouse, you will be directed to the Dashboard page. Click on “Finances” in the blue menu at the top; then select “Donations” from the drop-down menu which appears.

Step 2

You will be directed to the Donations page. If you would like to edit an existing donation, click the pencil icon next to your chosen donation record in the list. You will then be able to update the details of that donation, using the same process (steps 3 - 10) as you would to record a new one.



	Received	Accepted	Rejected	Reported	Donor	Amount	Reason	Source	Type	Status
✎	30 Mar 2020				[redacted]	[redacted]			Bank Transfer	
✎	10 Mar 2020				[redacted]	[redacted]			Cash	
✎	26 Feb 2020				[redacted]	[redacted]			Cheque	

Managing loans

What you will learn in this section

Permissions needed

- How to view your loans

	View	Edit	Create
Donations	✓		

- How to record new loans

	View	Edit	Create
Donations	✓	✓	✓
Contacts	✓	✓	✓

- How to edit existing loans

	View	Edit	Create
Donations	✓	✓	

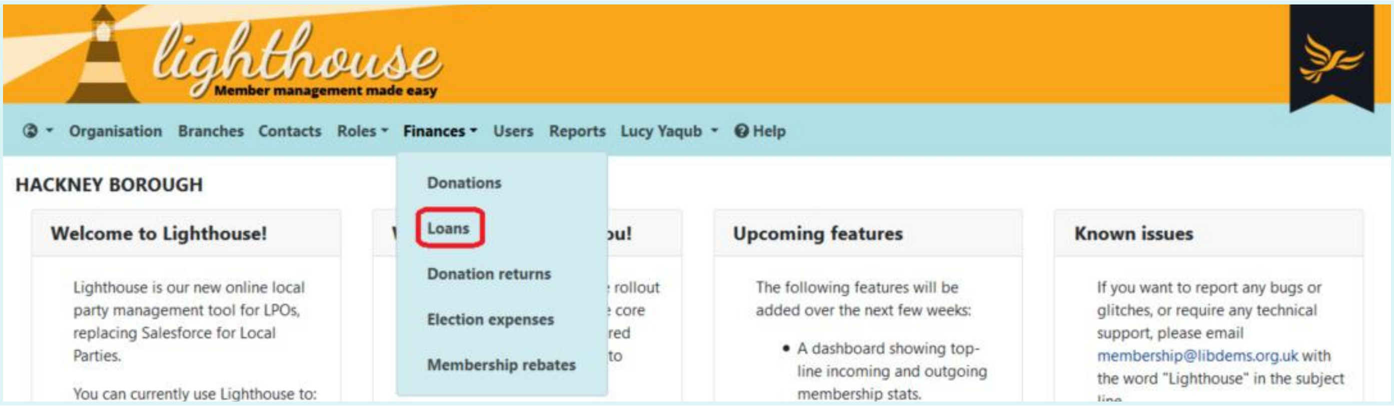
- How to record loan repayments

	View	Edit	Create
Donations	✓	✓	

How to view your loans

Step 1

After logging into Lighthouse, you will be directed to the Dashboard page. Click on “Finances” in the blue menu at the top; then select “Loans” from the drop-down menu which appears.



HACKNEY BOROUGH

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:

Upcoming features

The following features will be added over the next few weeks:

- A dashboard showing top-line incoming and outgoing membership stats.

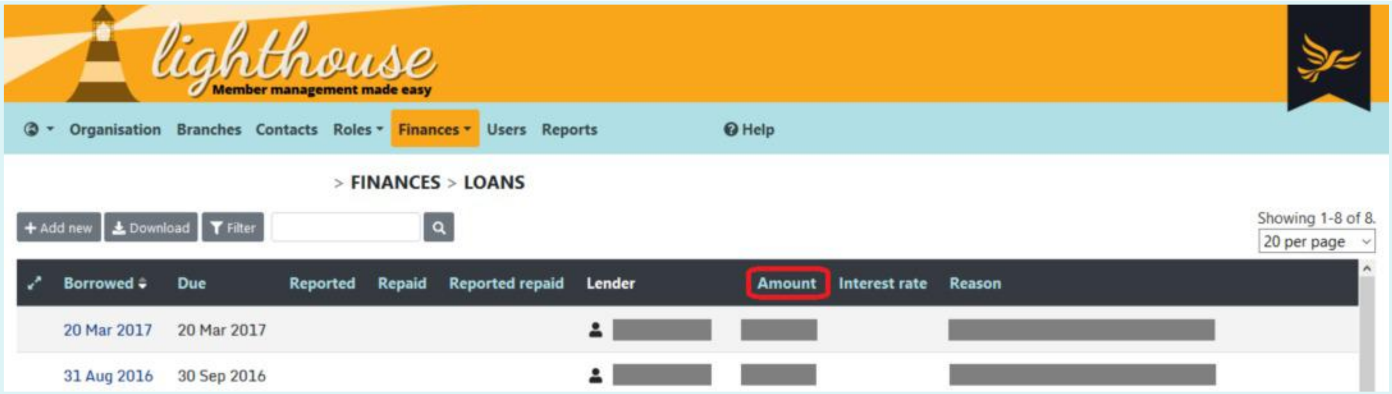
Known issues

If you want to report any bugs or glitches, or require any technical support, please email membership@libdems.org.uk with the word "Lighthouse" in the subject line.

Step 2

You will be directed to the Loans page, where you can view a list of the loans your local party has taken out. Here you can also see headline information such as the name of the business or individual who made the loan, the amount loan, the reason for the loan, and when it is due.

Click on any of the blue column headers to sort the data according to that field. For example, you could sort your loans in order of size by clicking the “Amount” header.



> FINANCES > LOANS

Showing 1-8 of 8.

20 per page

Borrowed	Due	Reported	Repaid	Reported repaid	Lender	Amount	Interest rate	Reason
20 Mar 2017	20 Mar 2017				👤 [redacted]	[redacted]		[redacted]
31 Aug 2016	30 Sep 2016				👤 [redacted]	[redacted]		[redacted]

How to record new loans

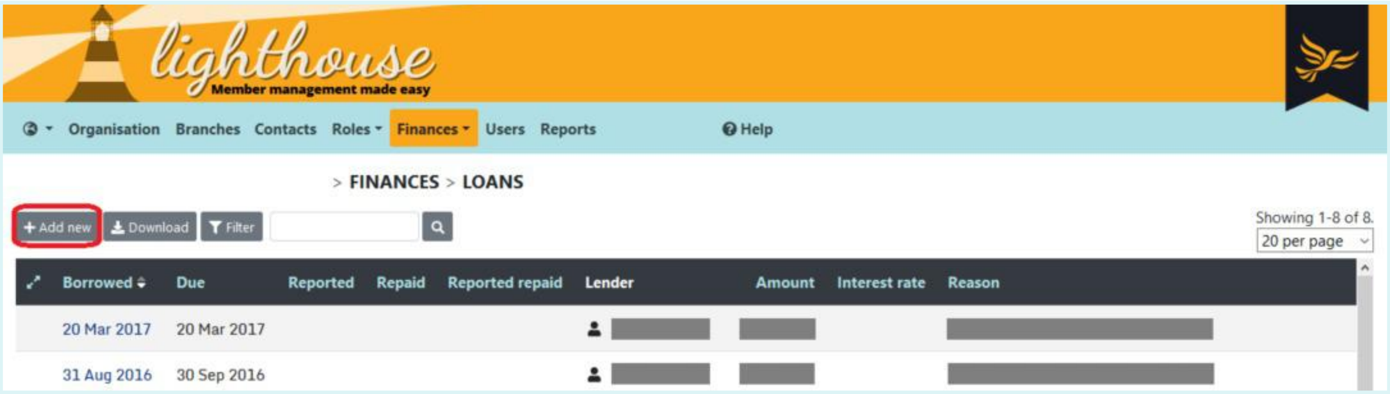
Step 1

After logging into Lighthouse, you will be directed to the Dashboard page. Click on “Finances” in the blue menu at the top; then select “Loans” from the drop-down menu which appears.

Step 2

You will be directed to the Loans page, where you can view a list of the loans your local party has taken out.

To add a new loan, click “Add new” at the top left of the screen.



Borrowed	Due	Reported	Repaid	Reported repaid	Lender	Amount	Interest rate	Reason
20 Mar 2017	20 Mar 2017				[redacted]	[redacted]		[redacted]
31 Aug 2016	30 Sep 2016				[redacted]	[redacted]		[redacted]

Step 3

You will be directed to the “New Loan” page. To get started, begin typing the name of an individual, company or party organisation in the first field. If they are already a contact in Lighthouse, the name will appear automatically below the “name” field. Click on this to choose your lender, then fill in their most up-to-date electoral number (for individual donations only), which you can find on Connect.

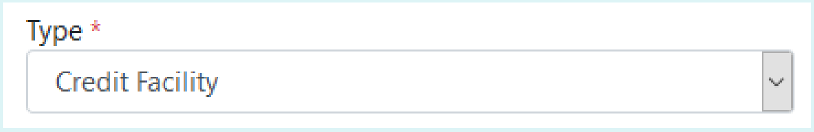
If the donor is not already a contact in Lighthouse, you can click on one of the three buttons below the “name” field to add a new individual, company or party organisation. Note that you will need contact details for the relevant individual to hand, and, in the case of company loans, the business’ registration number as listed at Companies House.

Start typing the name or email of an existing contact or organisation within Lighthouse to see suggestions.

Only add a new contact if the contact definitely does not already exist. Any changes you make to to the contact below will be saved for this donation only and will not alter the contact record.

Step 4

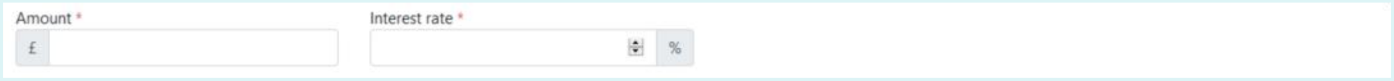
Next, choose the type of loan - credit facility, loan, or overdraft - from the drop-down box.



Type *
Credit Facility

Step 5

Type the amount of money borrowed in the “Amount” field, and the interest rate in the field next to that. Note that you do not need to type the percentage symbol into this box.



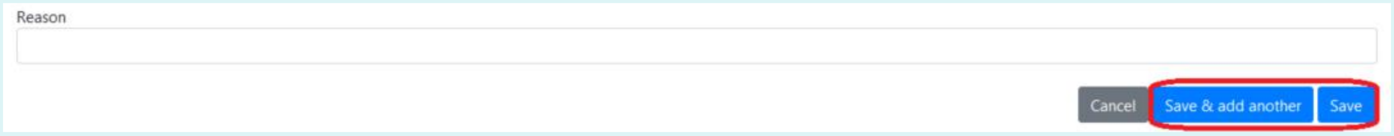
Step 6

Confirm the date of the loan and its due date using the next two fields. You can either do this by typing in the date, or by choosing the correct date from the calendar which appears when you click into one of the date fields.

Step 7

Finally, note the reason for the loan (if applicable) in the last field.

Once you are happy that the information you have entered is correct, click “Save” to save your loan, or click “Save and add another” to submit information about another loan.



If you clicked “Save”, you will be returned to the Loans page. Your newly-recorded loan will not appear here straight away, as the system needs to perform a number of automated checks on the loan before displaying it. Check back in 15 minutes to view your new loan.

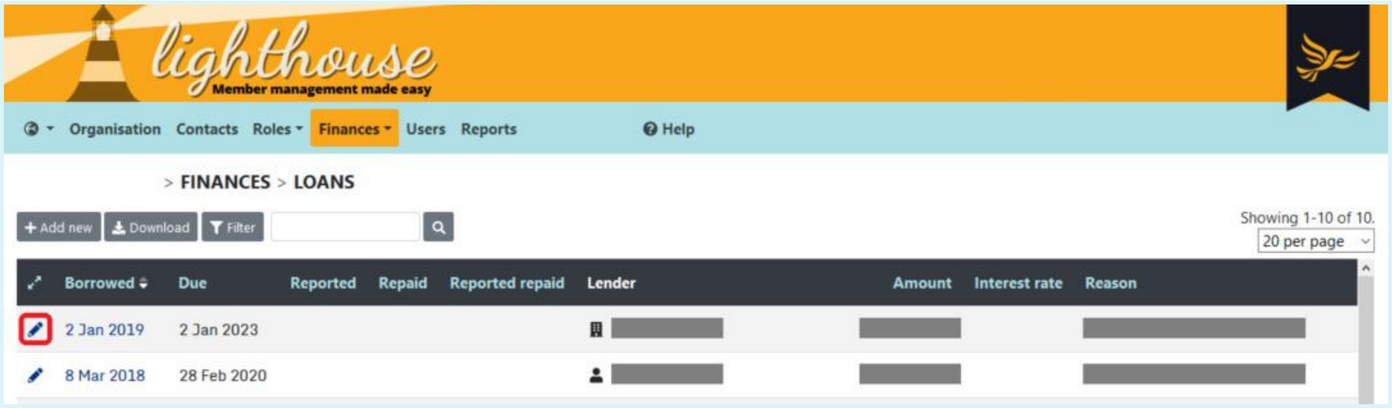
How to edit existing loans

Step 1

After logging into Lighthouse, you will be directed to the Dashboard page. Click on “Finances” in the blue menu at the top; then select “Loans” from the drop-down menu which appears.

Step 2

You will be directed to the Loans page. If you would like to edit an existing loan, click the pencil icon next to your chosen donation record in the list. You will then be able to update the details of that donation, using the same process (steps 3 - 7) as you would to record a new one.



Borrowed	Due	Reported	Repaid	Reported repaid	Lender	Amount	Interest rate	Reason
2 Jan 2019	2 Jan 2023				[redacted]	[redacted]		[redacted]
8 Mar 2018	28 Feb 2020				[redacted]	[redacted]		[redacted]

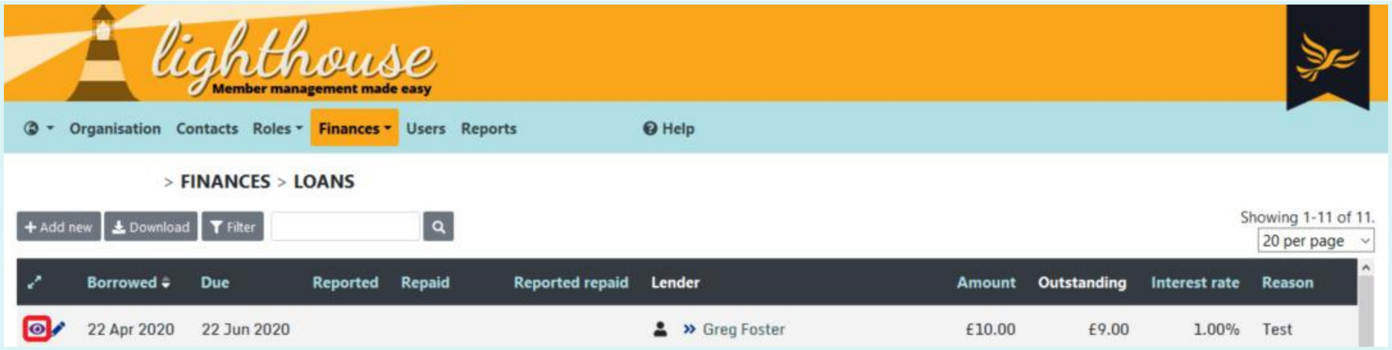
How to record loan repayments

Step 1

After logging into Lighthouse, you will be directed to the Dashboard page. Click on "Finances" in the blue menu at the top; then select "Loans" from the drop-down menu which appears.

Step 2

You will be directed to the Loans page. Chose the loan you would like to record a payment for from the list, and click on the eye icon next to the pencil on the left of the table.



	Borrowed	Due	Reported	Repaid	Reported repaid	Lender	Amount	Outstanding	Interest rate	Reason
	22 Apr 2020	22 Jun 2020				» Greg Foster	£10.00	£9.00	1.00%	Test

Step 3

You will be directed to the details page for your chosen loan, where you can see information about the amount borrowed, the lender, its due date and any previous repayments.

To record a new repayment, click "Add repayment" at the top-left of the page.

Loan

Reference: LOAN0000279
Test
£10.00 at 1.00%
Type: Loan

Dates

Borrowed: 22 Apr 2020
Due: 22 Jun 2020

Lender

Individual Loan
Greg Foster

Step 4

First, choose the type of repayment you would like to record - a cash repayment, a conversion of a loan to a donation, or a payment of interest added - from the drop-down menu.

Type *

Cash Repayment

Step 5

Next, select or type in the date of the repayment and the amount you will be repaying. Note that Lighthouse automatically tells you how much is still owing on the loan, excluding this payment,, underneath the “Amount repaid” field.

Date repaid *

dd / mm / yyyy

Set to: today / yesterday / empty

Amount repaid *

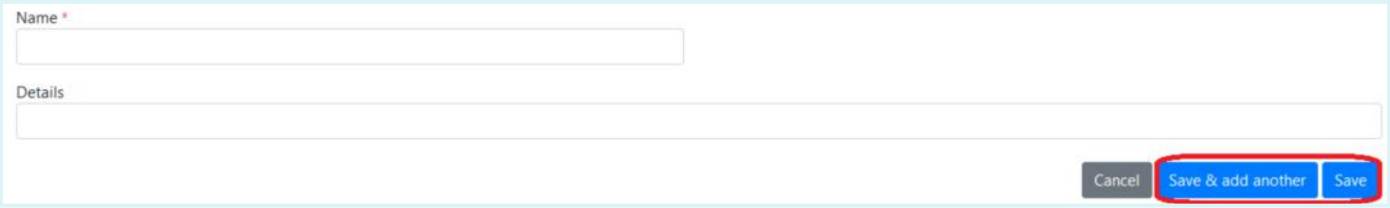
£ 9.00

The amount outstanding on this loan, excluding this repayment, is £9.00.

Step 6

Finally, type in the name of the person who made the repayment in the “Name” field, and any notes you would like to add in the “Details” field.

When you are finished, click “Save”, or “Save and add another” if you would like to record another loan repayment.



Name *

Details

Step 7

If you clicked “Save”, you will be directed back to the details page for your chosen loan, where the repayment will be noted in the list at the bottom of the page.

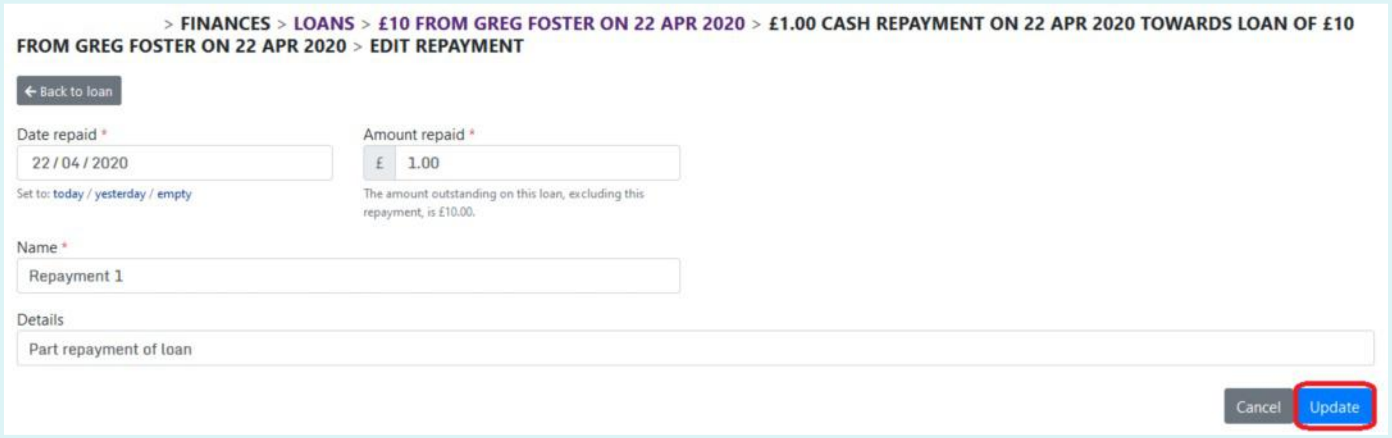
If you made a mistake in recording a loan repayment, click the pencil icon next to the date of the repayment.

Repayments

	Date	Type	Name	Details	Reported	Donation	Amount	Outstanding
	22 Apr 2020			*Loan opened*				£10.00
✎	22 Apr 2020	Cash Repayment	Repayment 1	Part repayment of loan			£1.00	£9.00

Step 8

You will be directed to the “Edit repayment” page, where you can change the date of the repayment, the amount repaid, the name of the repayment and any notes in the “Details” field. Note that you cannot change the type of repayment or the name of the person making it after it has been created.



> FINANCES > LOANS > £10 FROM GREG FOSTER ON 22 APR 2020 > £1.00 CASH REPAYMENT ON 22 APR 2020 TOWARDS LOAN OF £10 FROM GREG FOSTER ON 22 APR 2020 > EDIT REPAYMENT

Date repaid *: 22 / 04 / 2020

Set to: today / yesterday / empty

Amount repaid *: £ 1.00

The amount outstanding on this loan, excluding this repayment, is £10.00.

Name *: Repayment 1

Details: Part repayment of loan

When you are happy with your changes, click “Update”. You will be directed back to the details page for your chosen loan.

Managing pledges

What you will learn in this section

Permissions needed

- How to view your pledges

	View	Edit	Create
Donations	✓		

- How to record new pledges

	View	Edit	Create
Donations	✓	✓	✓
Contacts	✓	✓	✓

- How to edit existing pledges

	View	Edit	Create
Donations	✓	✓	

- How to convert a pledge into a donation

	View	Edit	Create
Donations	✓	✓	✓

How to view your pledges

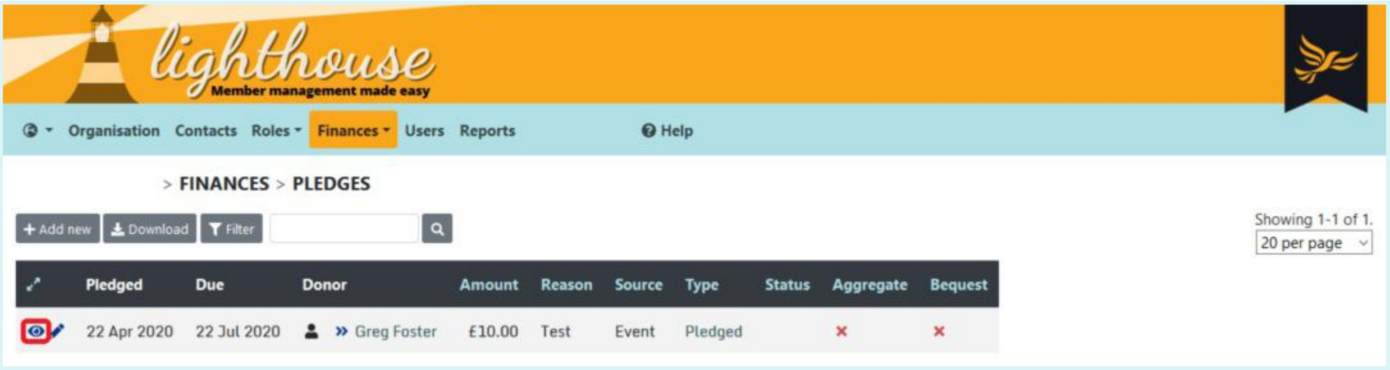
Step 1

After logging into Lighthouse, you will be directed to the Dashboard page. Click on “Finances” in the blue menu at the top; then select “Pledges” from the drop-down menu which appears.

Step 2

You will be directed to the Pledges page, where you can view a list of your pledges in chronological order alongside details of the amount pledged, the donor, reason, and source of the pledge. Click on any of the blue column headers to sort the data according to that field. For example, you could sort your pledges in order of size by clicking the “Amount” header.

To view more details of a specific pledge, click on the eye icon next to the pencil on the left of the table.



> FINANCES > PLEDGES

Showing 1-1 of 1.
20 per page

	Pledged	Due	Donor	Amount	Reason	Source	Type	Status	Aggregate	Bequest
	22 Apr 2020	22 Jul 2020	» Greg Foster	£10.00	Test	Event	Pledged		✗	✗

Step 3

You will be directed to the details page for your chosen pledge.

FINANCES > PLEDGES > £10 FROM GREG FOSTER PLEDGED ON 22 APR 2020 AND DUE ON 22 JUL 2020

Pledge

Reference: DON0626894
Test
£10.00
Source: Event
Type: Pledged

Dates

Pledged: 22 Apr 2020
Pledge due: 22 Jul 2020

Donor

Individual Donation
Greg Foster
Membership number: 10180363416
£10.00 raised from 21 donation(s)
Last donation: £1.00 on 30 Apr 2020
Largest donation: £12.00 on 30 Apr 2020

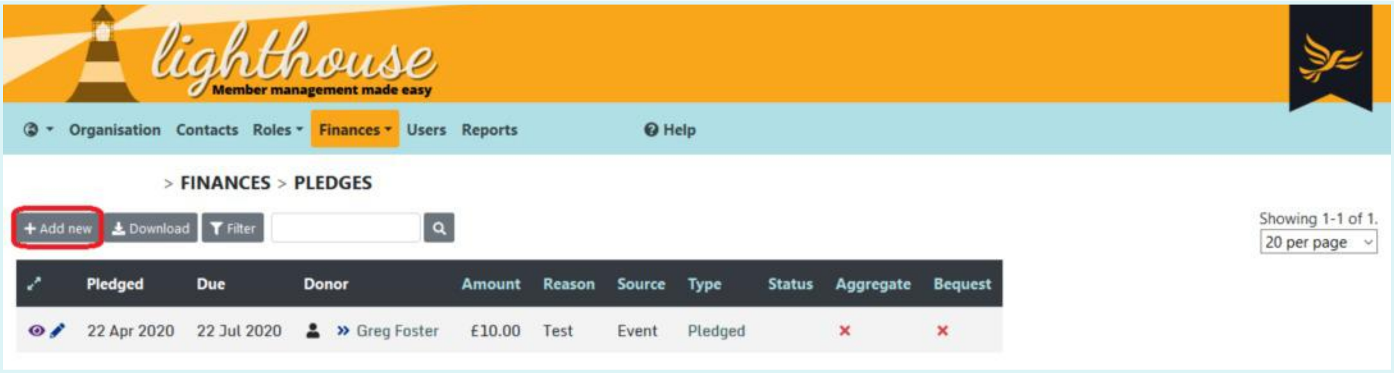
How to record new pledges

Step 1

After logging into Lighthouse, you will be directed to the Dashboard page. Click on “Finances” in the blue menu at the top; then select “Pledges” from the drop-down menu which appears.

Step 2

You will be directed to the Pledges page. To record a new pledge, click “Add new” at the top-left of the screen.

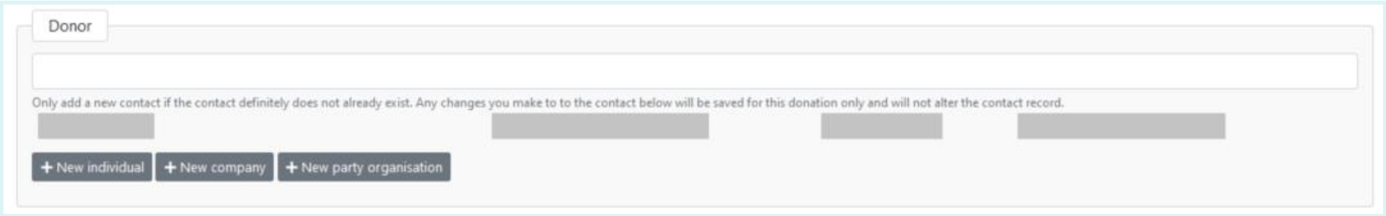


	Pledged	Due	Donor	Amount	Reason	Source	Type	Status	Aggregate	Bequest
	22 Apr 2020	22 Jul 2020	» Greg Foster	£10.00	Test	Event	Pledged		✗	✗

Step 3

You will be directed to the “New pledge” page. To get started, begin typing the name of an individual, company or party organisation in the first field. If they are already a contact in Lighthouse, the name will appear automatically below the “name” field. Click on this to choose your donor, and their contact details will be automatically filled in in the fields below.

If the donor is not already a contact in Lighthouse, you can click on one of the three buttons below the “name” field to add a new individual, company or party organisation. Note that you will need contact details for the relevant individual to hand, and, in the case of company donations, the business’ registration number as listed at Companies House.



Only add a new contact if the contact definitely does not already exist. Any changes you make to to the contact below will be saved for this donation only and will not alter the contact record.

Step 4

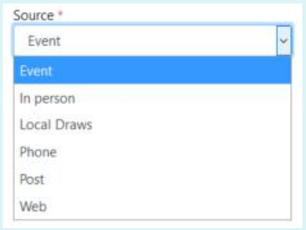
If you are recording a pledge from an individual, you will next need to type in their electoral number. You can find this by looking the contact up on Connect.

You can look up this number in Connect.

Step 5

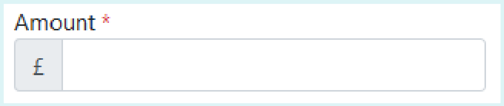
Next, you will need to choose the source of the pledge.

This essentially means where the pledge has come from, as you will see from the drop-down list that appears for this field.



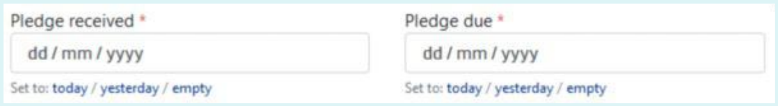
Step 6

Next, input the amount of money pledged in the “amount “ field.



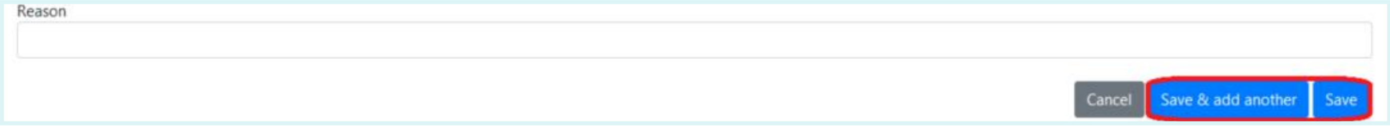
Step 7

Your next step is to note the dates the pledge was received, and the date the donor is expected to make the donation. Simply type in (or choose from the drop-down calendar menu) these dates in the “Pledge received” and “Pledge due” fields.



Step 8

Finally, note the reason for the pledge. For example, you could note the appeal or fundraising event which generated it.



When you are finished, click “Save”, or “Save and add another” to record another pledge. If you click “Save”, you will be directed back to the Pledges page, where you can you view your new pledge in the list.

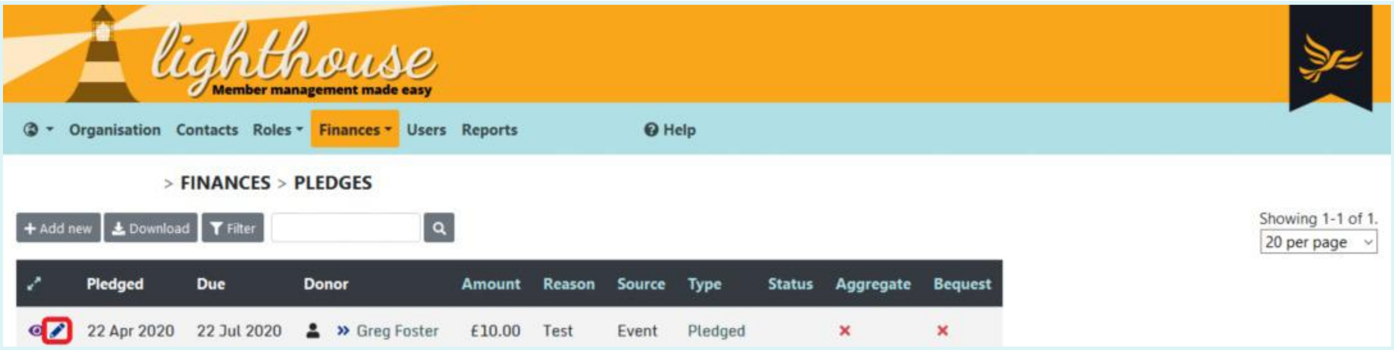
How to edit existing pledges

Step 1

After logging into Lighthouse, you will be directed to the Dashboard page. Click on “Finances” in the blue menu at the top; then select “Pledges” from the drop-down menu which appears.

Step 2

You will be directed to the Pledges page. To edit an existing pledge, locate it in the list and click the pencil icon (next to the eye icon) on the left side of the table.



	Pledged	Due	Donor	Amount	Reason	Source	Type	Status	Aggregate	Bequest
	22 Apr 2020	22 Jul 2020	» Greg Foster	£10.00	Test	Event	Pledged		×	×

Note that you can also edit a pledge by clicking on the icon to show full details for that pledge, and then clicking “Edit” at the top left of the screen.

Step 3

You will be directed to the “Edit pledge” page. You will then be able to update the details of that pledge, using the same process (steps 3 - 8) as you would to record a new one.

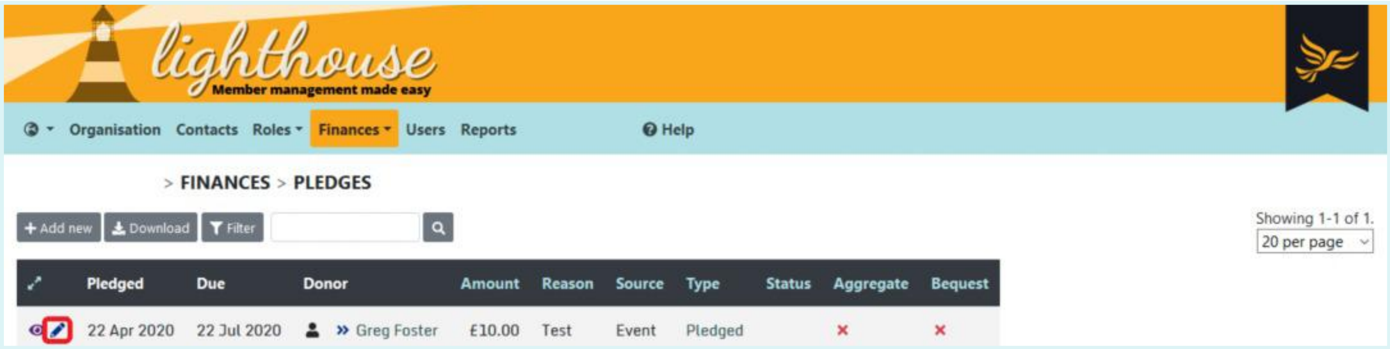
How to convert a pledge into a donation

Step 1

After logging into Lighthouse, you will be directed to the Dashboard page. Click on “Finances” in the blue menu at the top; then select “Pledges” from the drop-down menu which appears.

Step 2

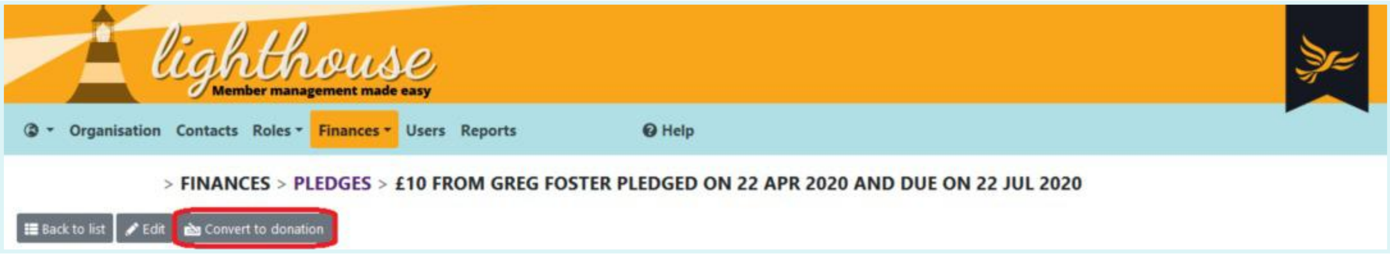
You will be directed to the Pledges page. Choose the pledge you would like to convert from the list, pledge, then click the pencil icon (next to the eye icon) on the left side of the table.



	Pledged	Due	Donor	Amount	Reason	Source	Type	Status	Aggregate	Bequest
	22 Apr 2020	22 Jul 2020	» Greg Foster	£10.00	Test	Event	Pledged		×	×

Step 3

You will be directed to the details page for your chosen pledge. To convert it into a donation, click “Convert to donation”.



Step 4

You will be directed to the “Convert to donation” page. Many of the fields on this page will already be completed using the information you recorded about the pledge.

If you need assistance completing the required information, the steps are the same as you would follow to record a new donation - click here to learn more.

When you are finished, click “Convert” at the bottom of the page. Your new donation will be visible on the Donations page, and the pledge will be removed from the Pledge page.

Submitting PPERA returns

What you will learn in this section

- How to submit PPERA returns

Permissions needed

	View	Edit	Create
Donations	✓	✓	✓
Contacts	✓	✓	✓

How to submit PPERA returns

If you have any questions regarding what should and should not be included in your PPERA return, then please contact in the first instance compliance@libdems.org.uk

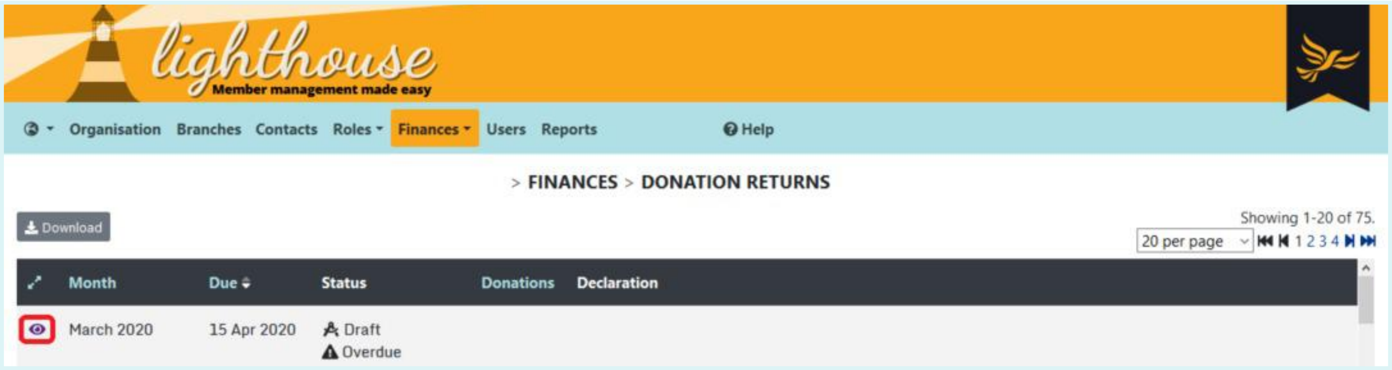
Before completing your PPERA return, please make sure you have added any donations necessary for the month you wish to create a return for. Please see our user guide on recording new donations for instructions on how to do this.

Step 1

After logging into Lighthouse, you will be directed to the Dashboard page. Click on “Finances” in the blue menu at the top; then select “Donation returns” from the drop-down menu which appears.

Step 2

You will be directed to the Returns page, where you will see a list of monthly PPERA returns arranged with the most recent months at the top. Find the return you need to submit from the list, and click on the eye in the left hand column.

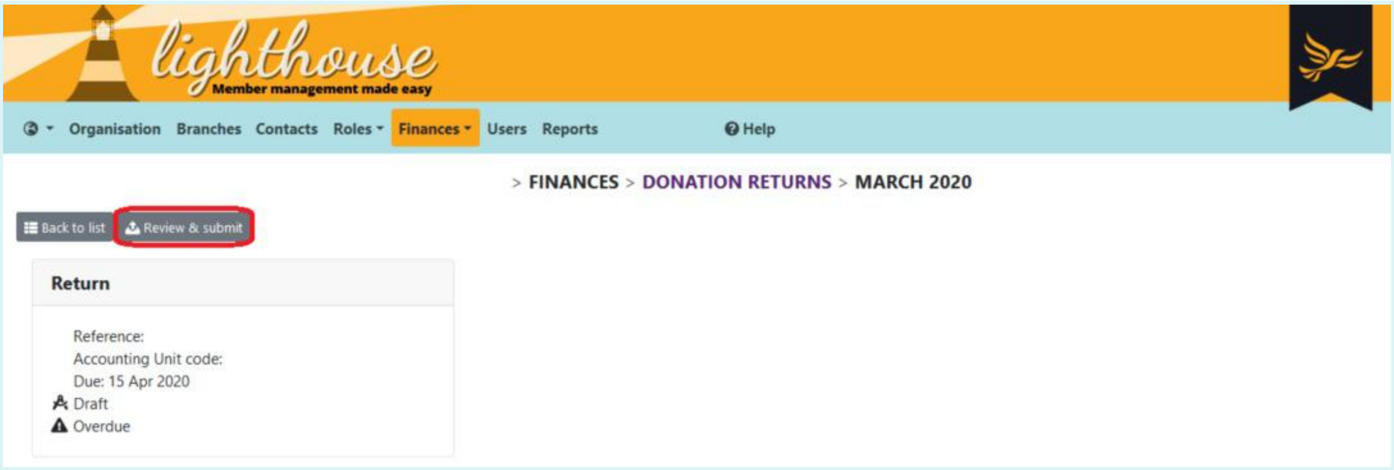


Month	Due	Status	Donations	Declaration
March 2020	15 Apr 2020	Draft Overdue		

Please note that the due date for any month’s return will always be the 15th of the following month, or the nearest preceding working day if this should fall on a weekend or bank holiday. For example, if completing the March 2020 return, the due date would be 15 April 2020.

Step 3

You will be directed to a page showing an overview of your chosen month's return. To start completing the return, click "Review and Submit" on the top left hand side of the page.



> FINANCES > DONATION RETURNS > MARCH 2020

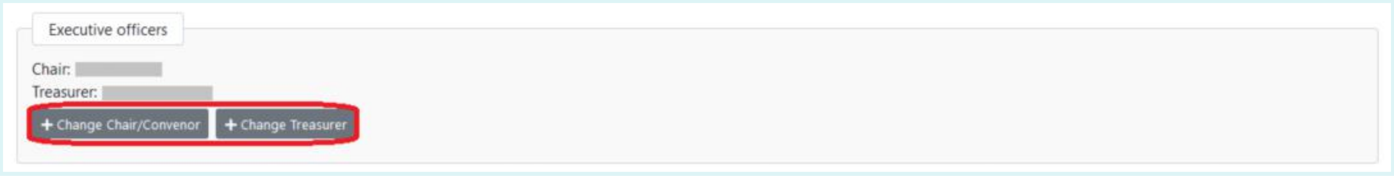
Return

Reference:
Accounting Unit code:
Due: 15 Apr 2020
Draft
Overdue

Step 4

You will be directed to the page where you can edit and submit your return. First, check that the details of your Chair and Treasurer are correct.

If the Chair and Treasurer details are not correct, make sure to click "Change Chair/Convener" or "Change Treasurer". A pop-up box will appear, into which you can search for and select your new Chair or Treasurer from a list of your existing members, and update their terms of office.



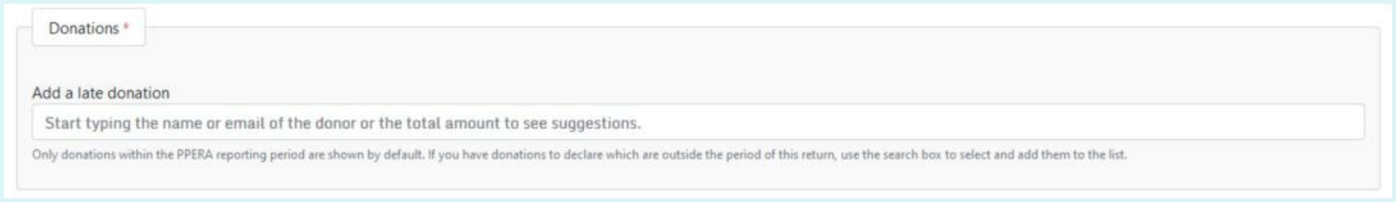
Chair: [redacted]
Treasurer: [redacted]

Step 5

You will next see a list of all the donations you logged in Lighthouse over the past month, including details of the amount, the donor, and the date the donation was accepted.

Make sure to click the checkbox next to all the donations to include them in your return.

If you have any donations to declare which are outside the period covered by the return, type the name of the donor into the box below the existing donations and select the donation you would like to include.



Add a late donation

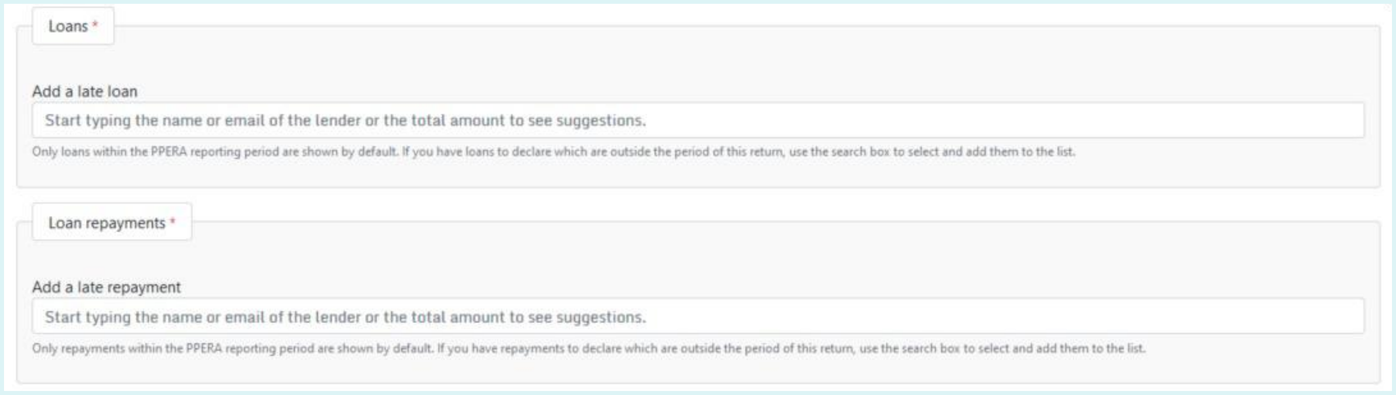
Start typing the name or email of the donor or the total amount to see suggestions.

Only donations within the PPERA reporting period are shown by default. If you have donations to declare which are outside the period of this return, use the search box to select and add them to the list.

If you have no donations or they are all below £500; please submit a nil return. To do this go straight to Step 7 and select the first tick-box to confirm a nil return.

Step 6

You will next see a list of all the loans and loan repayments you logged in Lighthouse over the past month. Follow the same process outlined in Step 5 to select the ones you would like to include in your return. As with donations, you can use the search box to look up loans or loan repayments outside the period covered by the return.



Add a late loan

Start typing the name or email of the lender or the total amount to see suggestions.

Only loans within the PPERA reporting period are shown by default. If you have loans to declare which are outside the period of this return, use the search box to select and add them to the list.

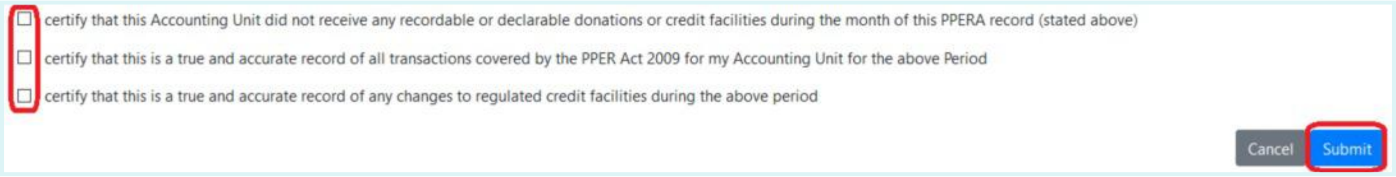
Add a late repayment

Start typing the name or email of the lender or the total amount to see suggestions.

Only repayments within the PPERA reporting period are shown by default. If you have repayments to declare which are outside the period of this return, use the search box to select and add them to the list.

Step 7

Finally, scroll to the bottom of the page and you will see three declarations along with tick-boxes for each one. When you are satisfied that the information and declarations are accurate, click “Submit” at the bottom right hand side of the page. Your status for this return should now be listed as “Submitted”.



☐ certify that this Accounting Unit did not receive any recordable or declarable donations or credit facilities during the month of this PPERA record (stated above)

☐ certify that this is a true and accurate record of all transactions covered by the PPER Act 2009 for my Accounting Unit for the above Period

☐ certify that this is a true and accurate record of any changes to regulated credit facilities during the above period

Submitting election expenses

What you will learn in this section

- How to submit election expenses

Permissions needed

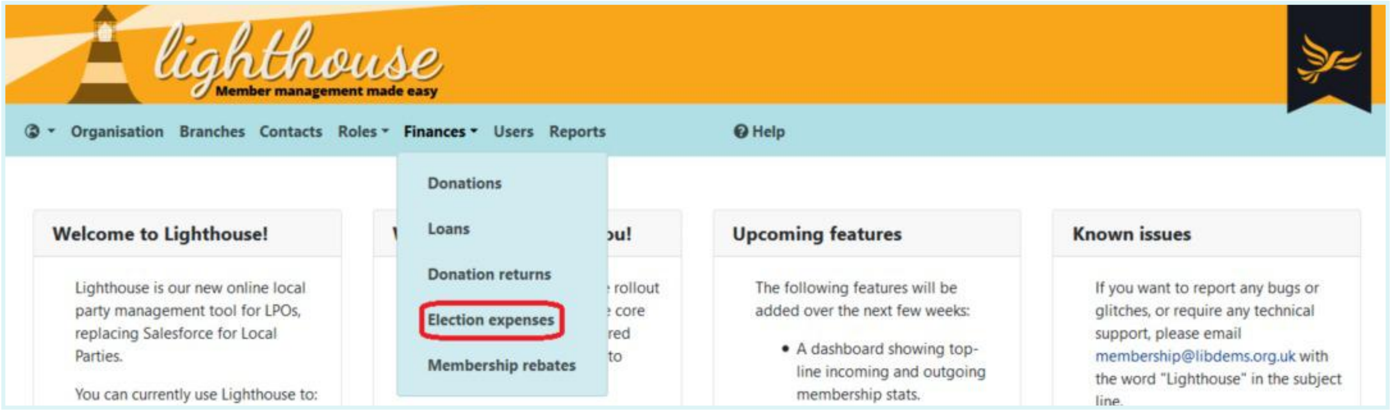
	View	Edit	Create
Expenses	✓	✓	✓

How to submit election expenses

Please note: this guidance is for local parties that need to submit itemised expenses. If you need to submit a nil return, please email compliance@libdems.org.uk to let them know.

Step 1

After logging into Lighthouse, you will be directed to the Dashboard page. Click on “Finances” in the blue menu at the top; then select “Election expenses” from the drop-down menu which appears.



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:

Upcoming features

The following features will be added over the next few weeks:

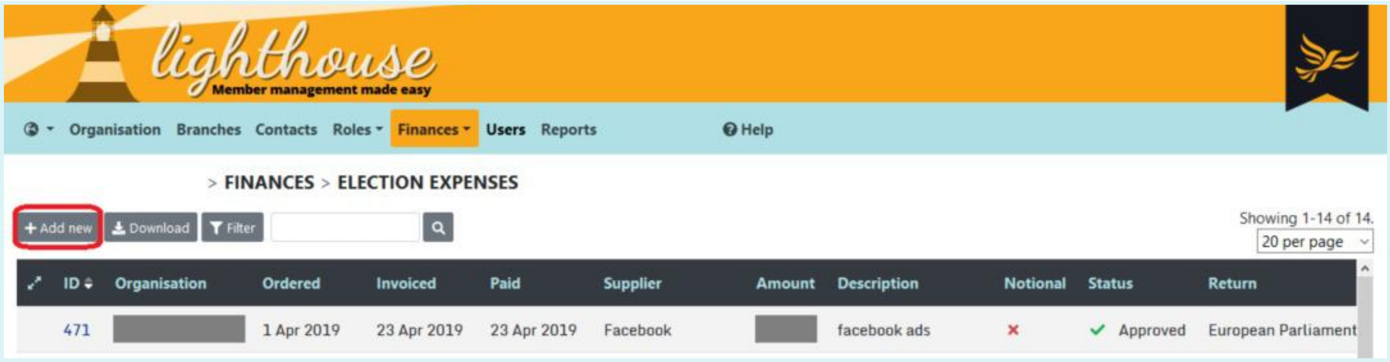
- A dashboard showing top-line incoming and outgoing membership stats.

Known issues

If you want to report any bugs or glitches, or require any technical support, please email membership@libdems.org.uk with the word "Lighthouse" in the subject line.

Step 2

You will be directed to the Election Expenses page. To submit a new expense, click “Add new” at the top left of the page.

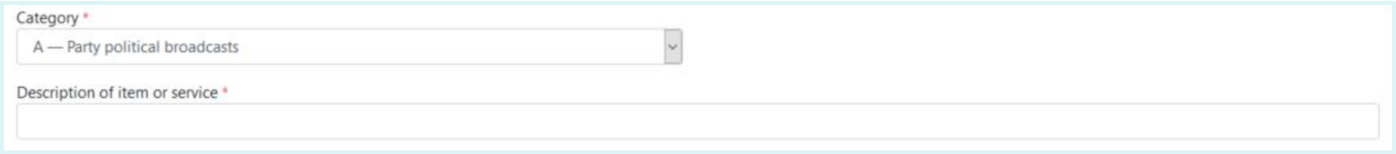


ID	Organisation	Ordered	Invoiced	Paid	Supplier	Amount	Description	Notional	Status	Return
471	[redacted]	1 Apr 2019	23 Apr 2019	23 Apr 2019	Facebook	[redacted]	facebook ads	✗	✓ Approved	European Parliament

Step 3

You will be directed to the New Expense page, where you can fill in details relating to your new submission. A red asterisk * denotes a compulsory field that you will need to complete in order to save your return.

Begin by choosing the category of spending your expense falls under, and type in a description of the item or service you paid for in the next box.



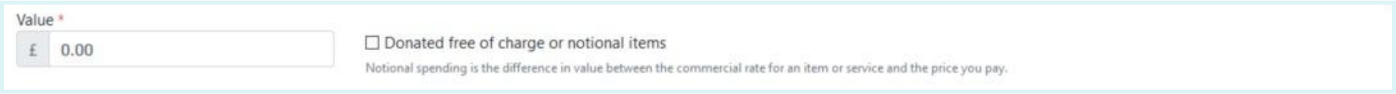
Category *

A — Party political broadcasts

Description of item or service *

Step 4

Next, type the value of the item or service into the "Value" field. If you did not pay full price for an item/service as it was donated or provided at a discounted rate, list the actual amount you paid (or £0.00 for a donated item) rather than the full price it would have cost, and tick the check box.



Value *

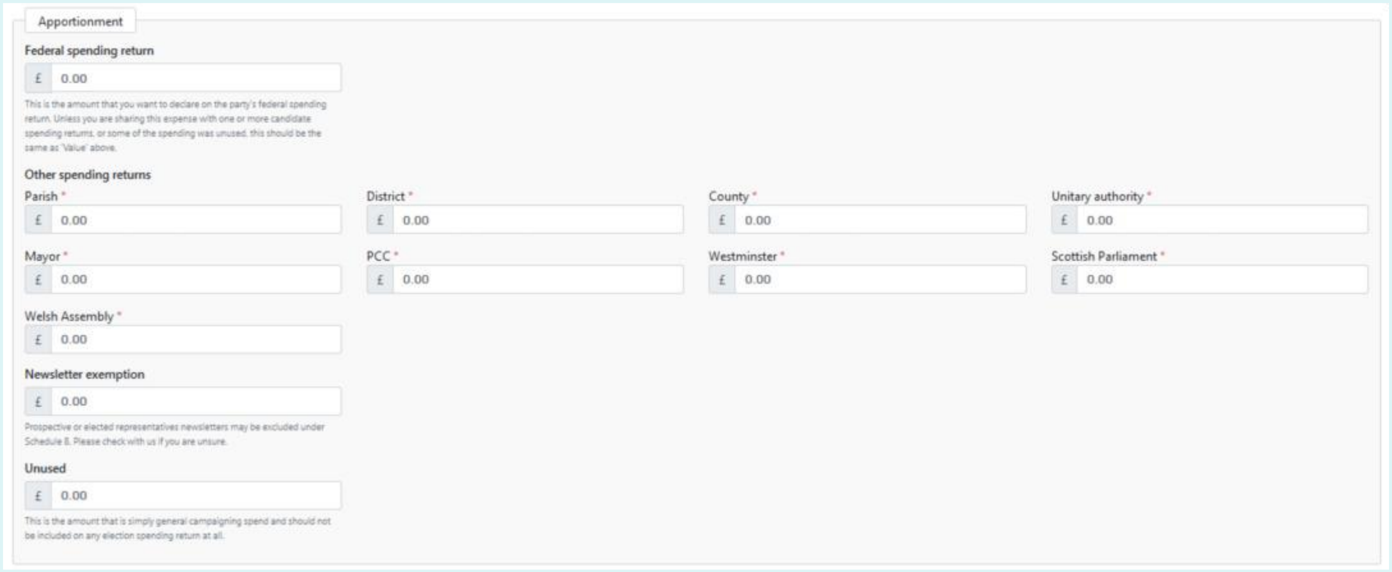
£ 0.00

☐ Donated free of charge or notional items

Notional spending is the difference in value between the commercial rate for an item or service and the price you pay.

Step 5

Next, complete the Apportionment section to specify what proportion of the expense will be submitted as part of the Federal Party's spending return. [Click here] to read more guidance on how to do this here, under "Completing your General Election 2019 spending return".



Apportionment

Federal spending return

£ 0.00

This is the amount that you want to declare on the party's federal spending return. Unless you are sharing this expense with one or more candidate spending returns, or some of the spending was unused, this should be the same as 'Value' above.

Other spending returns

Parish * £ 0.00

District * £ 0.00

County * £ 0.00

Unitary authority * £ 0.00

Mayor * £ 0.00

PCC * £ 0.00

Westminster * £ 0.00

Scottish Parliament * £ 0.00

Welsh Assembly * £ 0.00

Newsletter exemption

£ 0.00

Prospective or elected representatives newsletters may be excluded under Schedule 8. Please check with us if you are unsure.

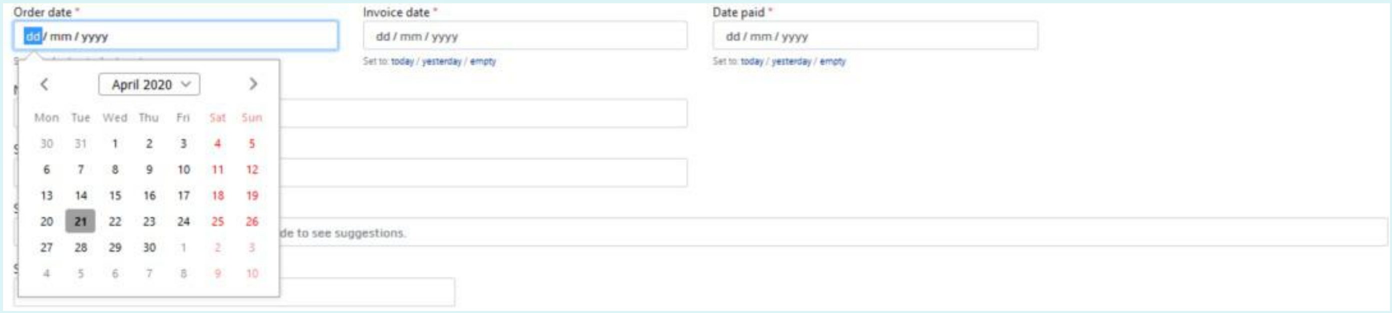
Unused

£ 0.00

This is the amount that is simply general campaigning spend and should not be included on any election spending return at all.

Step 6

Confirm the order date, invoice date and the payment date using the next three fields. You can either do this by typing in the date, or by choosing the correct date from the calendar which appears when you click into one of the date fields.



Order date * dd / mm / yyyy

Invoice date * dd / mm / yyyy

Set to: today / yesterday / empty

Date paid * dd / mm / yyyy

Set to: today / yesterday / empty

April 2020

Mon	Tue	Wed	Thu	Fri	Sat	Sun
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	1	2	3
4	5	6	7	8	9	10

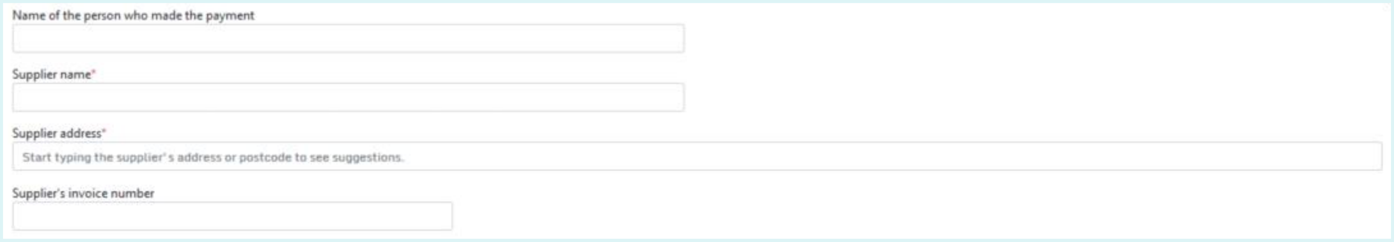
de to see suggestions.

Step 7

Note the name of the person who made the payment, then begin to type in the name of the supplier in the following field. This box contains a smart lookup, so the correct name and address in a standard format should appear as you start typing.

Click on the name of the supplier from the list of suggestions, and the name and address fields will populate automatically.

Then, type the invoice number into the “Supplier’s invoice number field.



Name of the person who made the payment

Supplier name*

Supplier address*

Start typing the supplier's address or postcode to see suggestions.

Supplier's invoice number

Step 8

At the bottom of the screen, you will be asked to upload an invoice or receipt, which must be submitted for every expense submitted. There is also the option to upload a copy of the item purchased, if this is a leaflet or other document. To do so, click on the Browse button to find the file you would like to upload (the file must be a PDF or an image file).

Upload a scan of the invoice or receipt *

Use PDF format or an image such as JPEG or PNG. This file MUST be an invoice or receipt and ideally a VAT invoice and it MUST contain the date, amount, supplier name and address. An order confirmation or payment advice is not sufficient.

Upload the item itself

For example, the leaflet that you paid to have printed. Use PDF format or an image such as JPEG or PNG

Step 9

When you're happy with all the details you've submitted, click "Save" at the very bottom of the page to complete the submission, or "Save and add another" to add another expense.

Please note: You will not be able to edit your expense once you've submitted it, so please double-check all the details before submitting.

You will then be directed back to the Election Expenses page, where your new submission will be shown in the list.

Reporting problems

Last updated: September 2020

What you will learn in this chapter

- How to report problems on Lighthouse

How to report problems on Lighthouse

What you will learn in this guide

- How to report problems on records

	View	Edit	Create
Data type of problem record	✓		

- How to view and update reported problems

	View	Edit	Create
Data type of problem record	✓		

Permissions needed

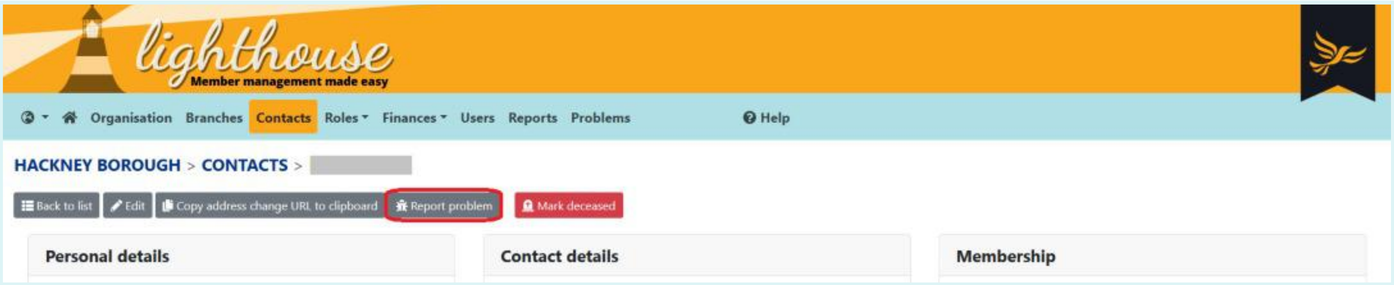
How to report problems on records

Whilst using Lighthouse, you may come across a record which contains errors - for example, a member with an incorrect birthday. Lighthouse now contains a “Report problem” button, which allows you to send a record and details of any errors to the team at HQ. This feature is supported on the following types of records:

- Contacts
- Roles
- Donations
- Pledges
- Loans

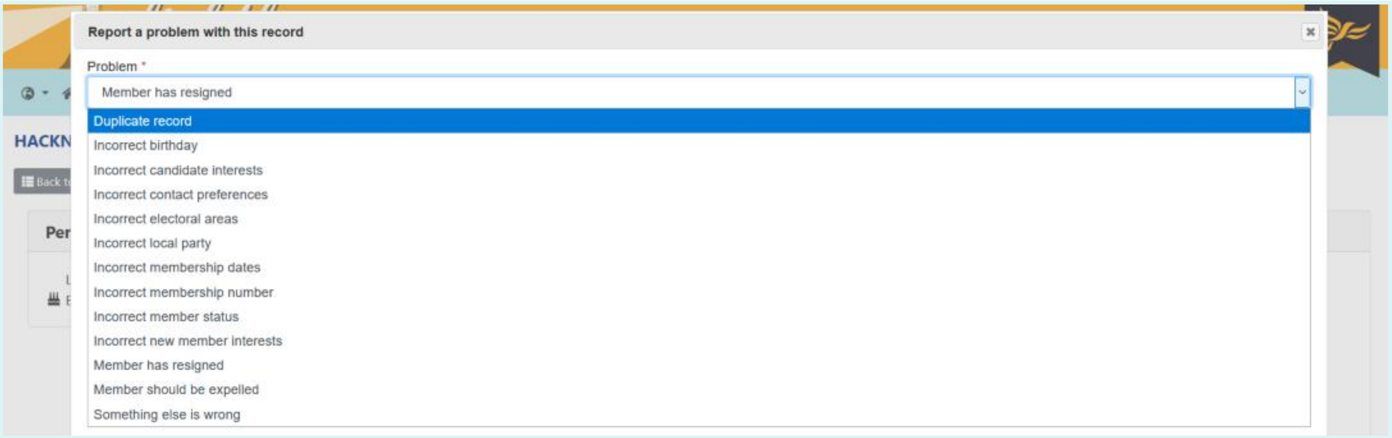
Step 1

If you come across a record which contains an error, click on the “Report problem” button at the top of the page.



Step 2

A pop-up menu will appear with a drop-down list of possible errors. Choose one from the list, or if nothing quite fits, select “Something else is wrong”.



Report a problem with this record

Problem *: Member has resigned

Step 3


Report a problem with this record

Problem *: Incorrect birthday

Please provide any relevant information which will help us to find or fix the problem here. You do not need to include the name or details of the record you are querying, as this will automatically be provided to the membership team based on the record you are currently viewing. If some aspect of this record is not correct, please provide the correct value here.

Please provide any relevant information which will help the HQ team to find or fix the problem. You do not need to include the name or details of the record you are querying, as this will automatically be provided. If some aspect of the record is not correct, please provide the correct value in the details box - you may see the details currently on the record appear beneath the drop-down menu.

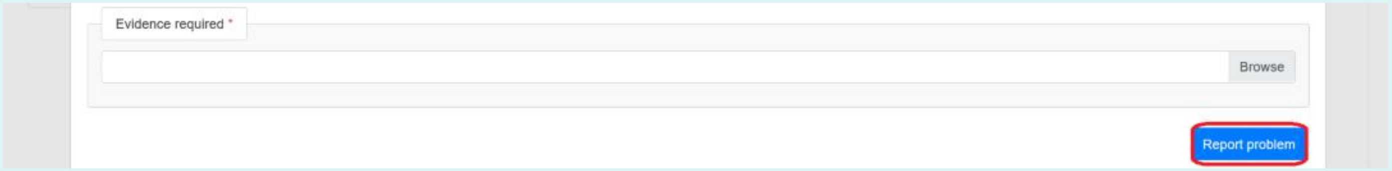
Step 3

For some types of errors, such as members who have resigned, you may be required to provide supporting evidence in PDF format. A third box will appear marked “Evidence”. To add evidence, click the button labelled “Browse” and select the file from your computer.


Please provide any relevant information which will help us to find or fix the problem here. You do not need to include the name or details of the record you are querying, as this will automatically be provided to the membership team based on the record you are currently viewing. If some aspect of this record is not correct, please provide the correct value here.

Step 4

When you are finished, click “Report problem” at the bottom of the pop-up box.
After you click this button, you will receive an email with details of the issue you have raised.

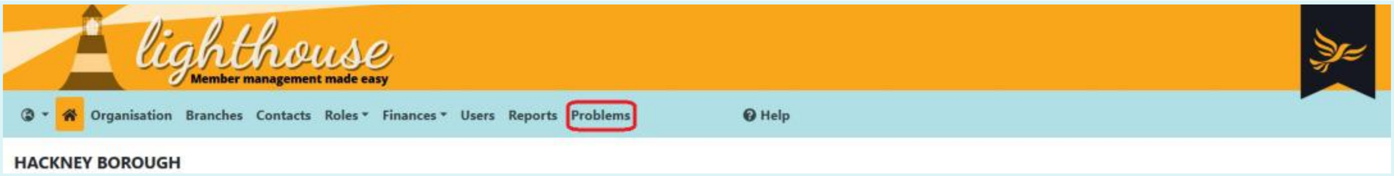


Please note that it may take a few seconds for your problem to appear on the “Problems” tab.

How to view and update reported problems

Step 1

After logging into Lighthouse, you will be directed to the Dashboard page. Click on “Problems” in the blue menu bar at the top.



Step 2

You will be directed to the “Problems” tab, where the problems reported by users in your local party can be viewed in a list. You can use the filter options at the top of this list to view all problems, unresolved (open) problems or solved (closed) problems.

To view the details of a problem you reported, click on the eye icon at the left hand side of the list - in the same row as the problem you wish to view.

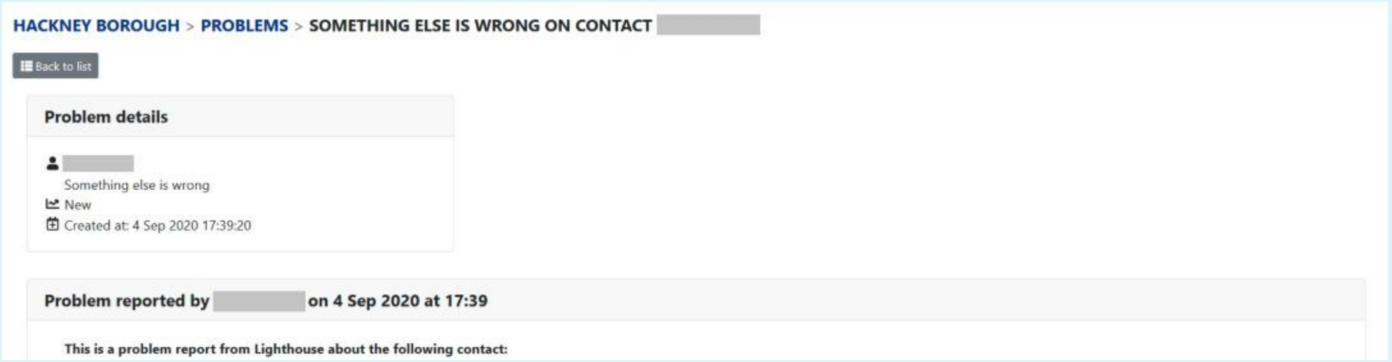
HACKNEY BOROUGH > PROBLEMS

Showing 1-1 of 1.

About	Description	Status	Reported by	Reported at	Assigned to	Last updated	Response due
[redacted]	Something else is wrong	new	[redacted]	4 Sep 2020 17:39			

Step 3

You will be directed to the details page, where you can view further information about the reported problem.



HACKNEY BOROUGH > PROBLEMS > SOMETHING ELSE IS WRONG ON CONTACT [redacted]

Problem details

[redacted]
Something else is wrong
New
Created at: 4 Sep 2020 17:39:20

Problem reported by [redacted] **on 4 Sep 2020 at 17:39**

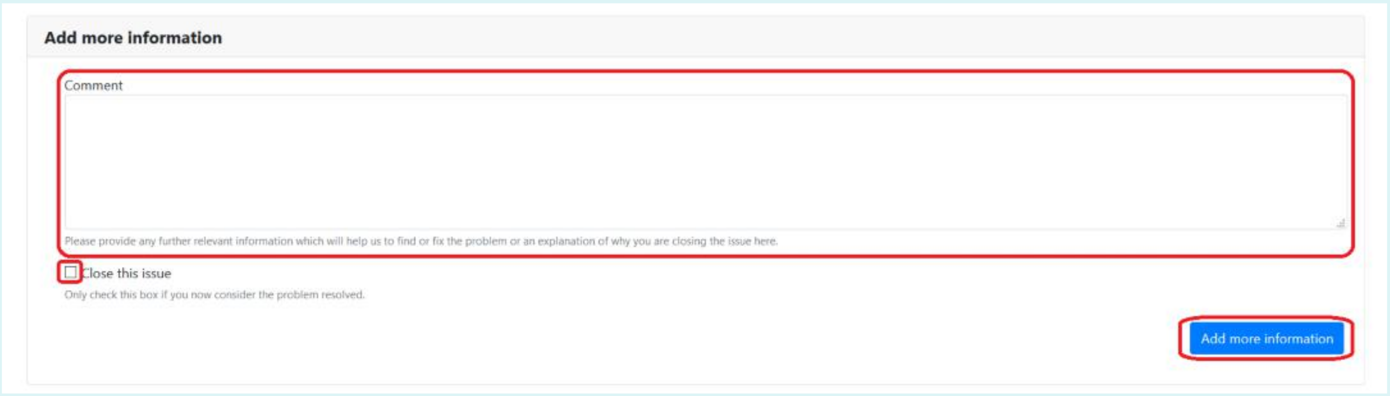
This is a problem report from Lighthouse about the following contact:

Step 4

If you would like to provide additional comments on the reported problem, scroll to the bottom of the details page.

You can type further information or updates into the “Comment” box, or chose to close the case by checking the “Solved” box. Please only check this box if you believe the issue has been resolved, and explain why you are closing the problem in the “Comment” section.

Once you are finished, click “Add more information”. You will receive an email to confirm your changes to the reported problem.



Add more information

Comment

Please provide any further relevant information which will help us to find or fix the problem or an explanation of why you are closing the issue here.

☐ Close this issue

Only check this box if you now consider the problem resolved.

Managing candidates

Last updated: March 2021

What you will learn in this chapter

- How to view electoral areas and candidates
- How to add a by-election
- How to manage a selection process

How to view electoral areas and candidates

What you will learn in this guide

- How to view electoral areas

	View	Edit	Create
Candidates	✓		

- How to view candidates

	View	Edit	Create
Candidates	✓		

Permissions needed

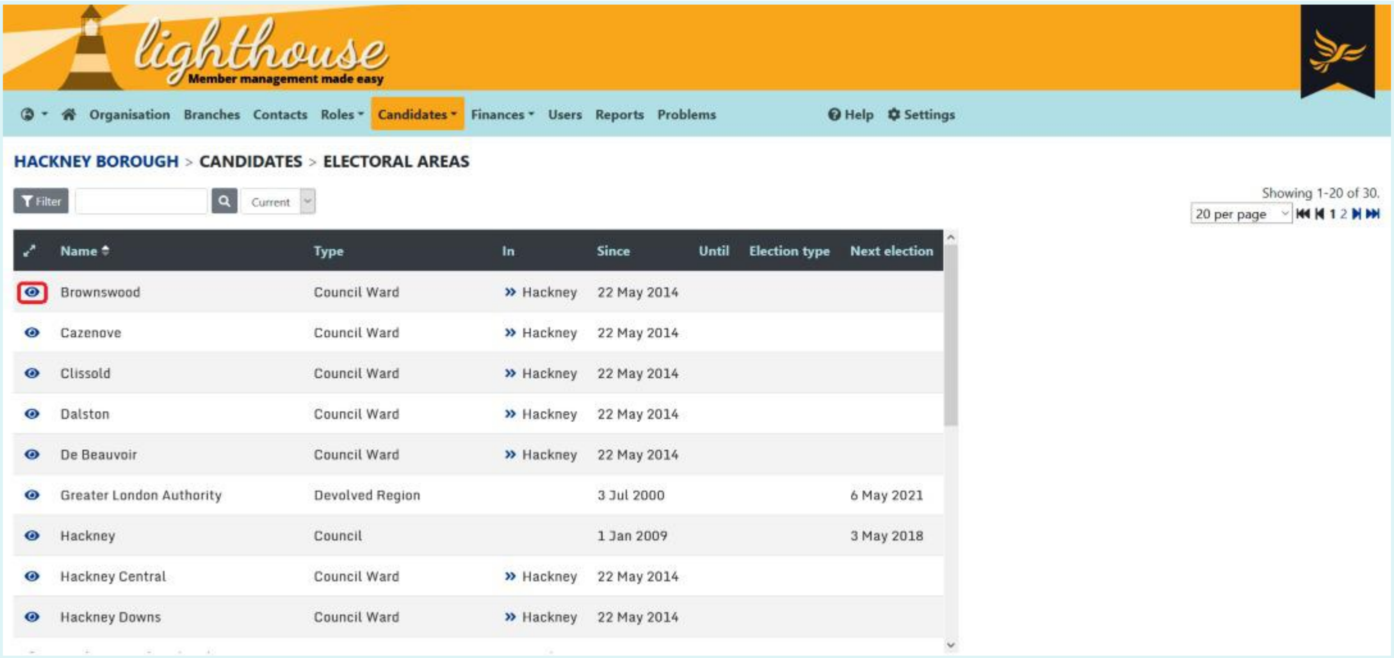
How to view electoral areas

Step 1

After logging into Lighthouse, you will be directed to the Dashboard page. Click on “Candidates” in the blue menu bar at the top; then select “Electoral Areas” from the drop-down menu which appears.

Step 2

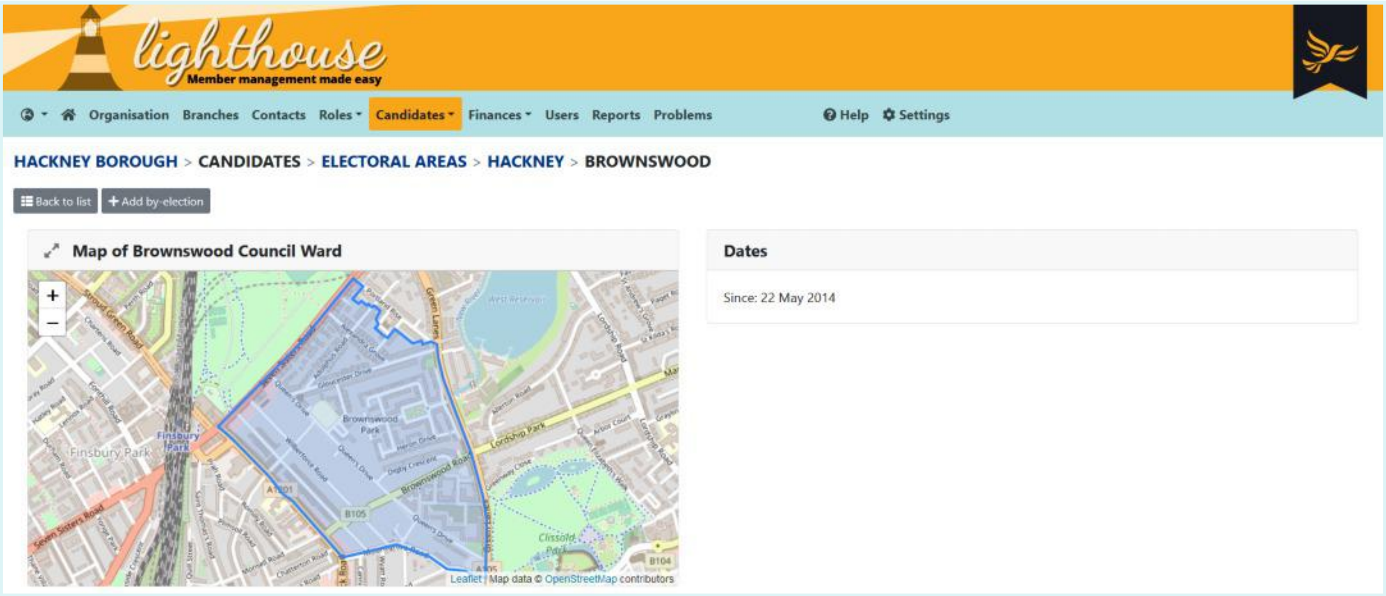
You will be directed to the Electoral Areas page, where you can see all the electoral areas in your local party. To view the boundaries of the electoral area and add an upcoming by election, click the eye icon on the left of the list.



Name	Type	In	Since	Until	Election type	Next election
Brownswood	Council Ward	» Hackney	22 May 2014			
Cazenove	Council Ward	» Hackney	22 May 2014			
Clissold	Council Ward	» Hackney	22 May 2014			
Dalston	Council Ward	» Hackney	22 May 2014			
De Beauvoir	Council Ward	» Hackney	22 May 2014			
Greater London Authority	Devolved Region		3 Jul 2000			6 May 2021
Hackney	Council		1 Jan 2009			3 May 2018
Hackney Central	Council Ward	» Hackney	22 May 2014			
Hackney Downs	Council Ward	» Hackney	22 May 2014			

Step 3

You will be directed to the page for that ward. These will show all the electoral areas, from council ward up to Westminster constituency. Here you can also see the dates when the area was created and the date of the next election for that area.



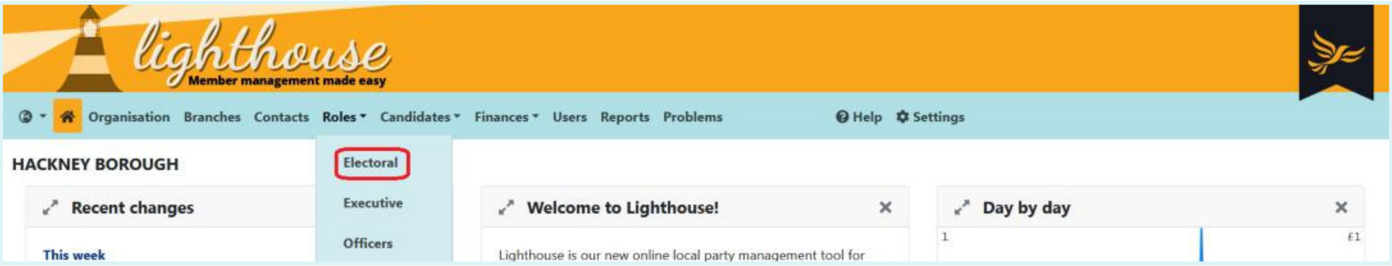
Since: 22 May 2014

If you would like to add a by-election for this ward, click "Add by-election" and follow the steps set out here.

Once your candidates have been selected, they will appear in the Candidates Tab.

Step 1

After logging into Lighthouse, you will be directed to the Dashboard page. Click on “Roles” in the blue menu bar at the top; then select “Electoral” from the drop-down menu which appears.



HACKNEY BOROUGH

Lighthouse is our new online local party management tool for

Step 2

You will be directed to a list of elected office holders, candidates and the upcoming elections they have been selected for. You can filter and download a list of selected candidates, by clicking “Download” or “Filter”.

HACKNEY BOROUGH > ROLES > ELECTORAL

Showing 1-15 of 15.

Reference	Position	Election		Constituency type	Holder	Email
MPR00237509	AM	Greater London Authority	London List - LONDON2016	Devolved Region	Caroline Pidgeon	[redacted]
MPR00238519	Prospective London Assembly Candidate	North East	GLA2021	Devolved Constituency	Kate Pothalingam	[redacted]
MPR00238544	Prospective London Assembly Candidate	Greater London Authority	London List GLA2021	Devolved Region	Caroline Pidgeon	[redacted]

How to add a by-election

What you will learn in this guide

- How to create a by-election

Permissions needed

	View	Edit	Create
Candidates	✓	✓	✓

How to create a by-election

All full elections will automatically be added to Lighthouse, but you will need to add the by-elections that are happening in your area. If you are a local user, you will only be able to add local by-elections; you will need to be a regional user or higher to add other by-elections.

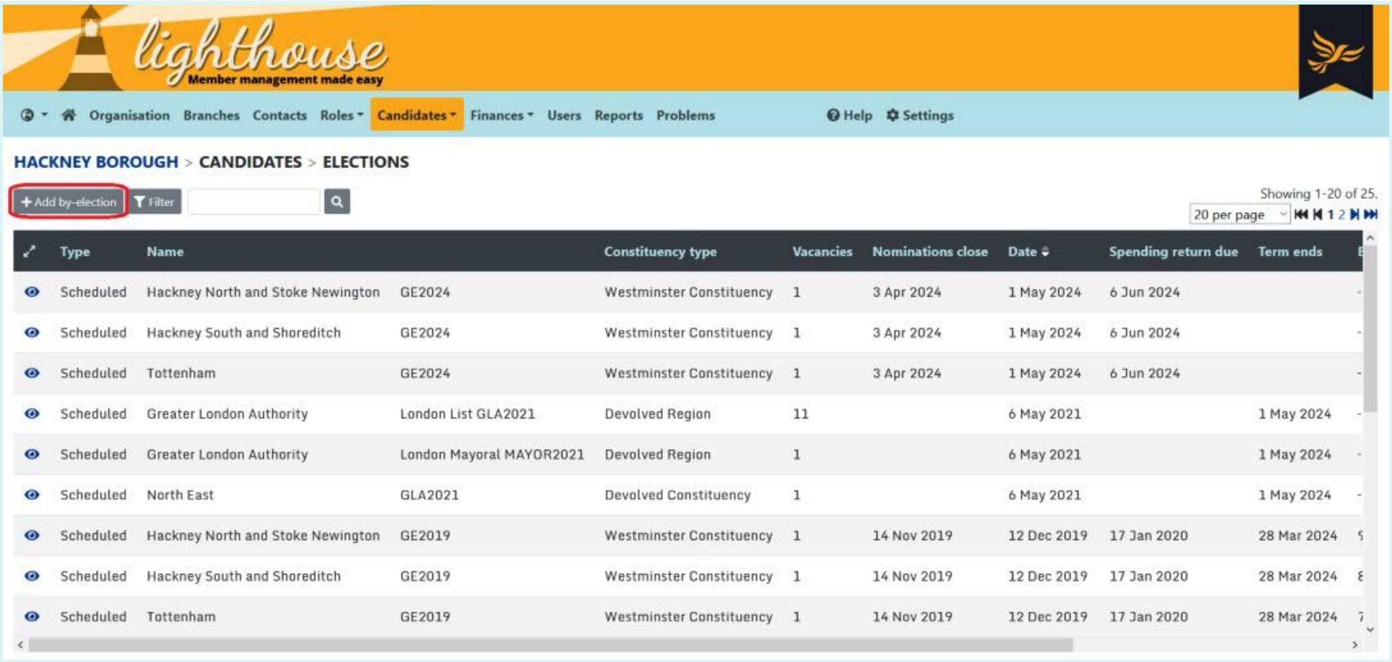
Step 1

After logging into Lighthouse, you will be directed to the Dashboard page. Click on "Candidates" in the blue menu bar at the top; then select "Elections" from the drop-down menu which appears.

thouse is our new online local party management tool for

Step 2

You will be directed to the Elections page, where you can see all the upcoming elections in your local area. To add a new by-election, click "Add by-election".



HACKNEY BOROUGH > CANDIDATES > ELECTIONS

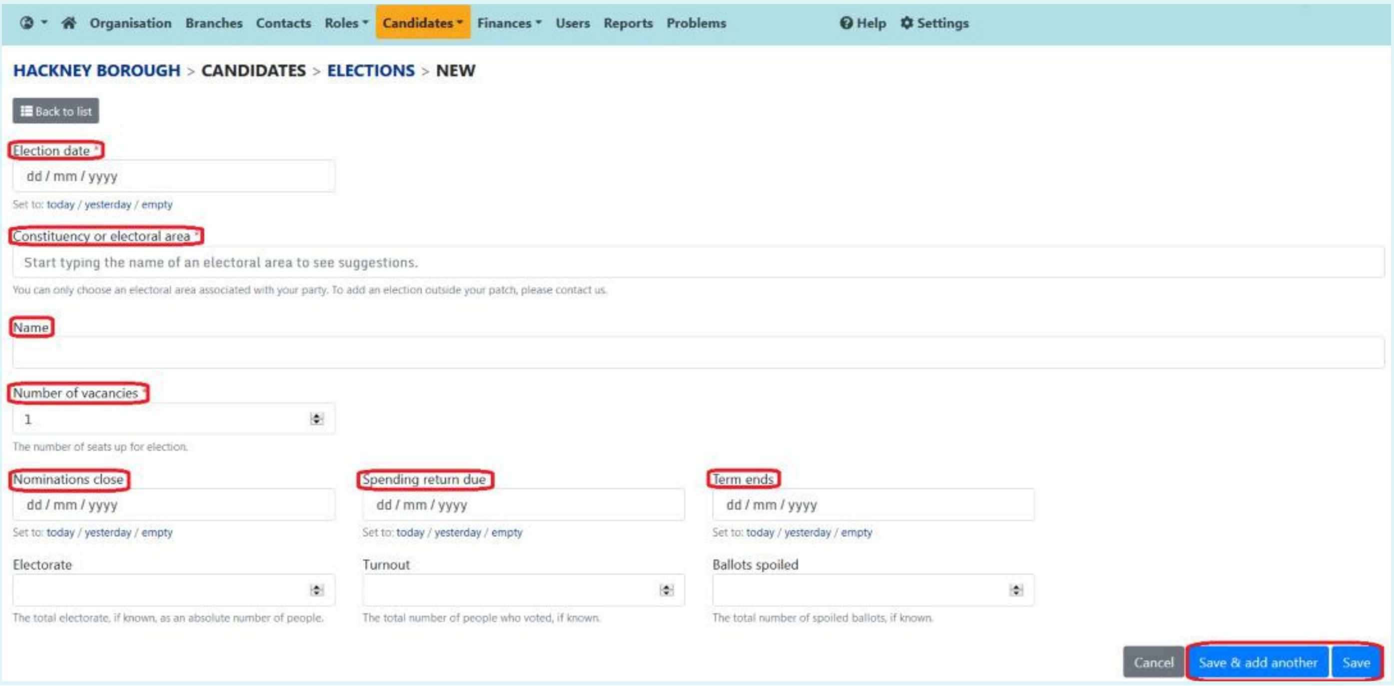
Showing 1-20 of 25.

	Type	Name		Constituency type	Vacancies	Nominations close	Date	Spending return due	Term ends
👁	Scheduled	Hackney North and Stoke Newington	GE2024	Westminster Constituency	1	3 Apr 2024	1 May 2024	6 Jun 2024	
👁	Scheduled	Hackney South and Shoreditch	GE2024	Westminster Constituency	1	3 Apr 2024	1 May 2024	6 Jun 2024	
👁	Scheduled	Tottenham	GE2024	Westminster Constituency	1	3 Apr 2024	1 May 2024	6 Jun 2024	
👁	Scheduled	Greater London Authority	London List GLA2021	Devolved Region	11		6 May 2021		1 May 2024
👁	Scheduled	Greater London Authority	London Mayoral MAYOR2021	Devolved Region	1		6 May 2021		1 May 2024
👁	Scheduled	North East	GLA2021	Devolved Constituency	1		6 May 2021		1 May 2024
👁	Scheduled	Hackney North and Stoke Newington	GE2019	Westminster Constituency	1	14 Nov 2019	12 Dec 2019	17 Jan 2020	28 Mar 2024
👁	Scheduled	Hackney South and Shoreditch	GE2019	Westminster Constituency	1	14 Nov 2019	12 Dec 2019	17 Jan 2020	28 Mar 2024
👁	Scheduled	Tottenham	GE2019	Westminster Constituency	1	14 Nov 2019	12 Dec 2019	17 Jan 2020	28 Mar 2024

Step 3

You will be directed to the new by-election page. You will need to work through each of the questions to add your by-election:

- Add the **election date**. You can do this either by typing the date in the box, or clicking the calendar icon and selecting the date.
- Select the **electoral area** for the by-election by typing its name into the box and selecting the correct one from the list of suggestions that appears. Note that if you have selected to add a by-election from a ward page (as seen here), this box will already be filled out for you.
- Add a **name** for the election, so you can easily identify it in the list of upcoming elections.
- Select the **number of vacancies** that need to be filled. This will usually be one, but if you have multiple councillors step down in a multi-member ward, you will need to change this.
- Add the key dates for the by-election, this includes the date **nominations close**, when the **spending return is due** and when the **term ends**. You can do this by typing in the dates, or selecting the dates by clicking the calendar icon.



HACKNEY BOROUGH > CANDIDATES > ELECTIONS > NEW

Election date *
dd / mm / yyyy
Set to: today / yesterday / empty

Constituency or electoral area *
Start typing the name of an electoral area to see suggestions.
You can only choose an electoral area associated with your party. To add an election outside your patch, please contact us.

Name

Number of vacancies *
1
The number of seats up for election.

Nominations close
dd / mm / yyyy
Set to: today / yesterday / empty

Spending return due
dd / mm / yyyy
Set to: today / yesterday / empty

Term ends
dd / mm / yyyy
Set to: today / yesterday / empty

Electorate
The total electorate, if known, as an absolute number of people.

Turnout
The total number of people who voted, if known.

Ballots spoiled
The total number of spoiled ballots, if known.

Once this is done, you will need to click ‘save’, or ‘save and add another’ if you have multiple upcoming by-elections

Once the by-election has happened, you will need to add key numbers for the election. This including the **size of the electorate**, the **turnout** and **ballots spoiled**. It is not a problem if you don't know this information, but it is useful to add if you do to track for future elections.

How to manage a selection process

What you will learn in this guide

Permissions needed

- How to create a selection process

	View	Edit	Create
Candidates	✓	✓	✓

- How to view and create application forms

	View	Edit	Create
Candidates	✓	✓	✓

- How to create a short listing committee

	View	Edit	Create
Candidates	✓	✓	✓

- How to create an applicant

	View	Edit	Create
Candidates	✓	✓	✓

- How to move applicants through a selection process

	View	Edit	Create
Candidates	✓	✓	

How to create a selection process

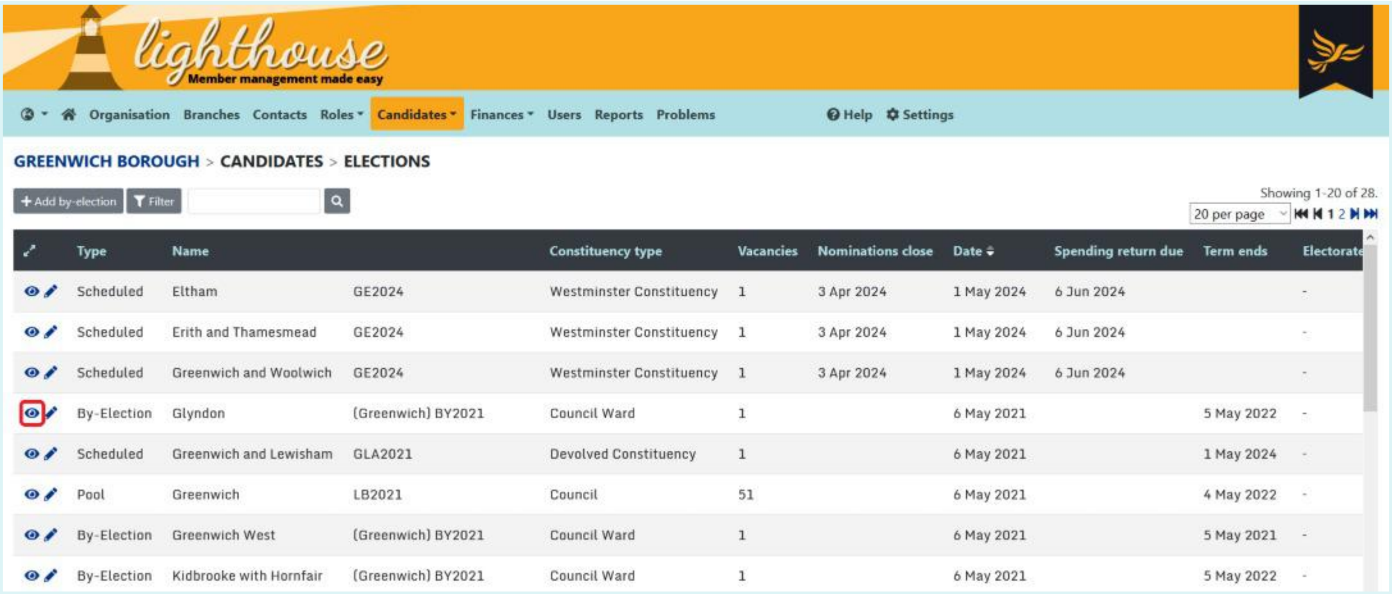
You can now add your selection processes to Lighthouse. If only you have access to a local party, you will only be able to add the selection process for local elections. If you have state or federal access, you will be able to add Westminster and Devolved Region selections as well. The process on Lighthouse is the same, regardless of the level of the selection.

Step 1

After logging into Lighthouse, you will be directed to the Dashboard page. Click on "Candidates" in the blue menu bar at the top; then select "Elections" from the drop-down menu which appears.

Step 2

You will be directed to the Elections page, where you can see all the upcoming elections in your local area, as well as the historic elections and their results. To add a new selection process for a local election or by-election, click on the eye icon on the left of the list for the election you want to add a selection for. As a local user, you will be able to view other types of upcoming elections, but you will not be able to add a selection process for them.



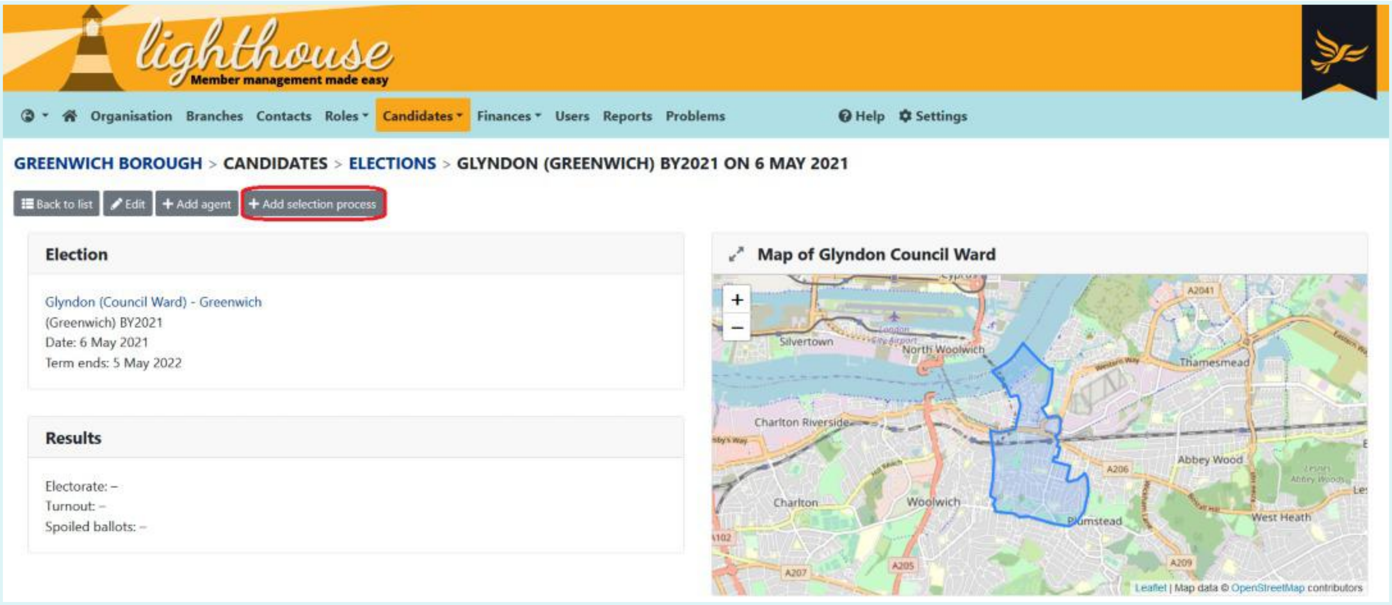
GREENWICH BOROUGH > CANDIDATES > ELECTIONS

Showing 1-20 of 28.

Type	Name		Constituency type	Vacancies	Nominations close	Date	Spending return due	Term ends	Electorate
Scheduled	Eltham	GE2024	Westminster Constituency	1	3 Apr 2024	1 May 2024	6 Jun 2024		-
Scheduled	Erith and Thamesmead	GE2024	Westminster Constituency	1	3 Apr 2024	1 May 2024	6 Jun 2024		-
Scheduled	Greenwich and Woolwich	GE2024	Westminster Constituency	1	3 Apr 2024	1 May 2024	6 Jun 2024		-
By-Election	Glyndon	(Greenwich) BY2021	Council Ward	1		6 May 2021		5 May 2022	-
Scheduled	Greenwich and Lewisham	GLA2021	Devolved Constituency	1		6 May 2021		1 May 2024	-
Pool	Greenwich	LB2021	Council	51		6 May 2021		4 May 2022	-
By-Election	Greenwich West	(Greenwich) BY2021	Council Ward	1		6 May 2021		5 May 2021	-
By-Election	Kidbrooke with Hornfair	(Greenwich) BY2021	Council Ward	1		6 May 2021		5 May 2022	-

Step 3

You will be directed to the detail page for the upcoming election you selected. Here you can view all the details for the upcoming election, including the boundaries, date of the election and the date the spending return is due by. Click 'Add new selection process' to begin creating your selection process.



GREENWICH BOROUGH > CANDIDATES > ELECTIONS > GLYNDON (GREENWICH) BY2021 ON 6 MAY 2021

Election

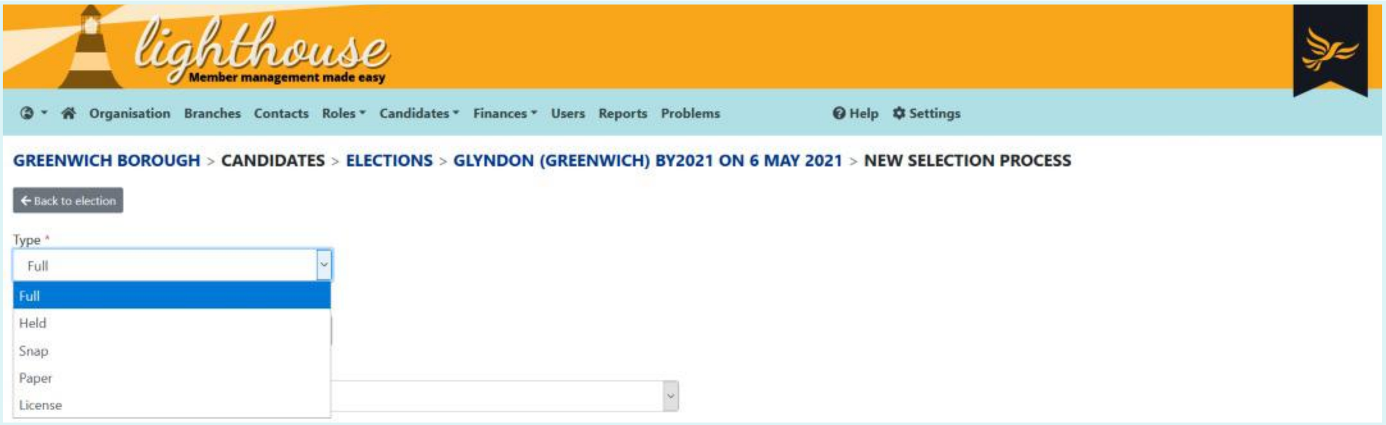
Glyndon (Council Ward) - Greenwich
(Greenwich) BY2021
Date: 6 May 2021
Term ends: 5 May 2022

Results

Electorate: –
Turnout: –
Spoiled ballots: –

Step 4

You will be directed to the new selection process page. To get started, choose what type of selection you are holding (full, held, snap, paper or license).



GREENWICH BOROUGH > CANDIDATES > ELECTIONS > GLYNDON (GREENWICH) BY2021 ON 6 MAY 2021 > NEW SELECTION PROCESS

Type *: Full

Step 5

Next, select the criteria you are using to select your candidates. Can all members apply, or is it only open for diversity lists?

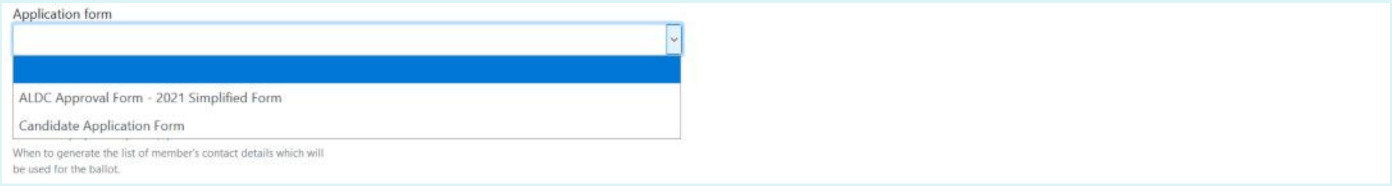
GREENWICH BOROUGH > CANDIDATES > ELECTIONS > GLYNDON (GREENWICH) BY2021 ON 6 MAY 2021 > NEW SELECTION PROCESS

Type *: Full

Method *: All Members

Step 6

Then select which form you will be asking the applicants to complete. There will be standard ones preloaded, but if you want to add your own, you can create one in forms. You can find guidance on how to do this [here.](here)

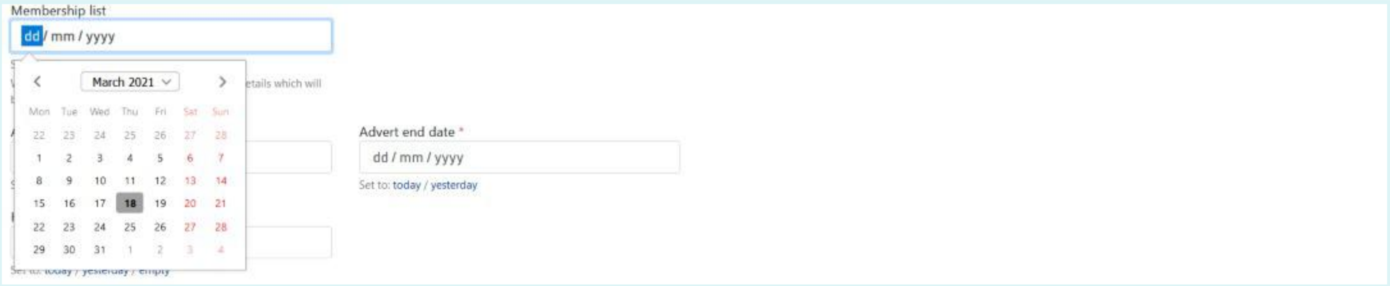


Application form

When to generate the list of member's contact details which will be used for the ballot.

Step 7

Choose the date you want to be the cut-off date for your membership list. This will be the date people will have to be members in the constituency to vote in the selection process. This should be the same date that your advert goes live.



Membership list: dd / mm / yyyy

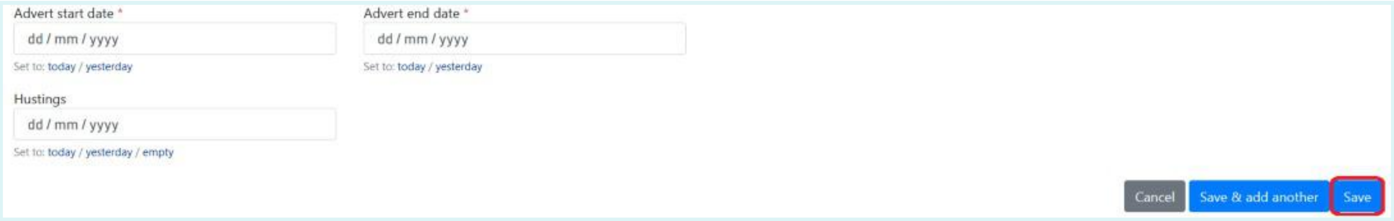
Advert end date *: dd / mm / yyyy

Set to: today / yesterday

Step 8

Select the date the advert goes live, and the date that it ends. Adverts are usually up for two to three weeks. **You must ensure these dates have been agreed with your returning officer.**

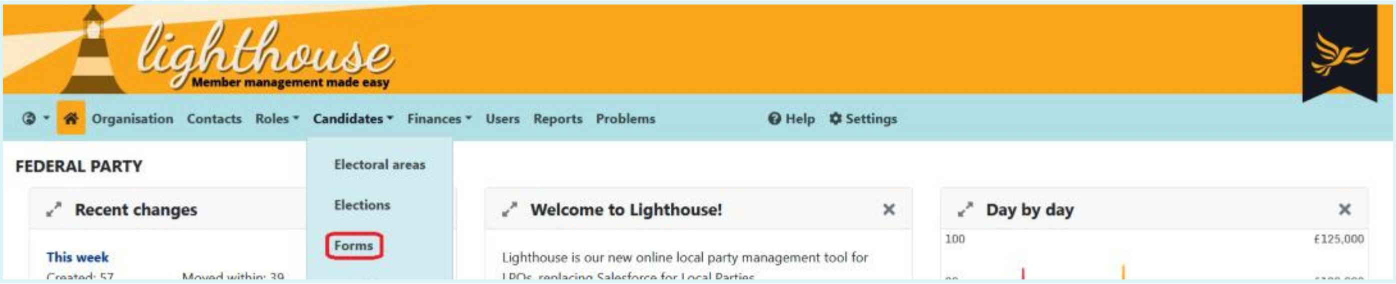
Next, enter the date of your hustings, then click “Save”. You will be taken back to the selection page, where you can view the details for the selection.



How to view and create application forms

Step 1

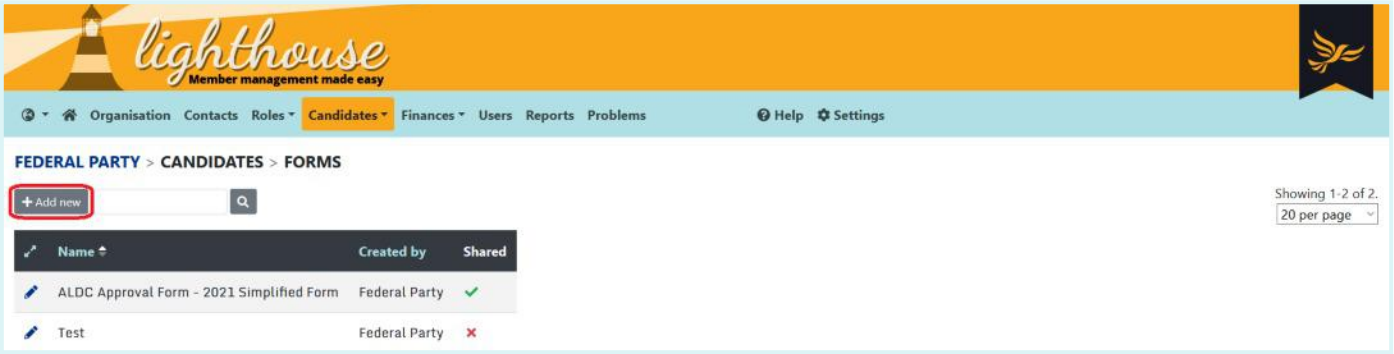
After logging into Lighthouse, you will be directed to the Dashboard page. Click on “Candidates” in the blue menu bar at the top; then select “Forms” from the drop-down menu which appears.



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

Step 2

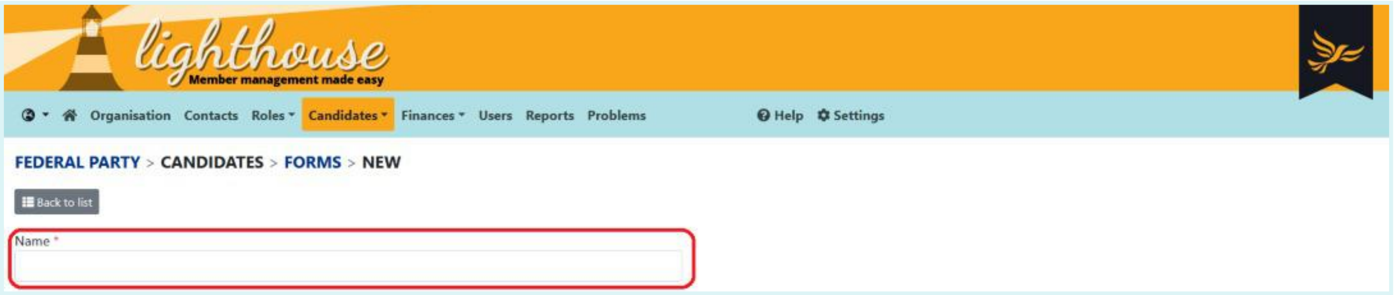
You will be directed to the Forms page, where you can see all your existing application forms. A series of standard forms will be preloaded into Lighthouse, so you can choose from those, depending on which form you want to use for your selection. To create a new application form, click “Add new”.



Name	Created by	Shared
ALDC Approval Form - 2021 Simplified Form	Federal Party	✓
Test	Federal Party	✗

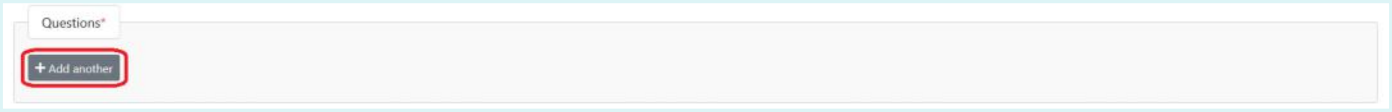
Step 3

First, type a name for your form into the “Name” field.

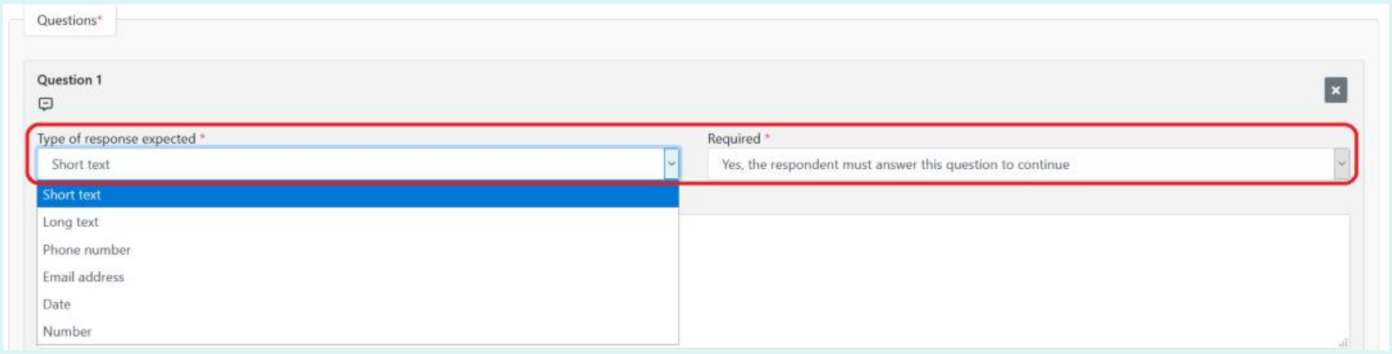


Step 4

To add questions to your form, click “Add another”.



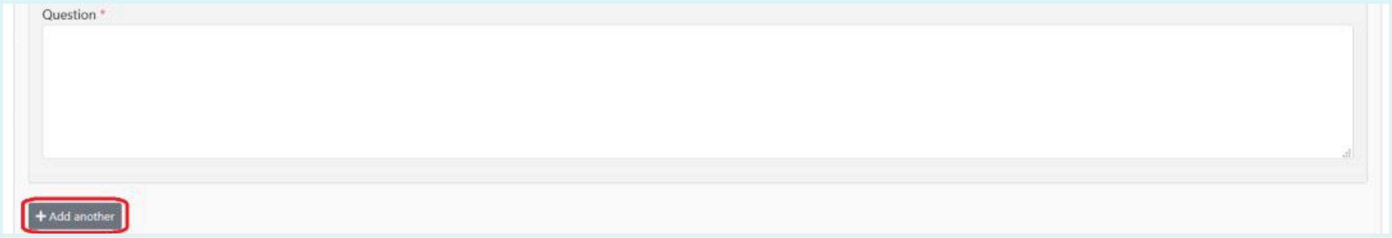
For each question, you will need to select a question type from the “Type of response expected” drop-down list, as well as whether or not it is required.



Type of response expected *: Short text

Required *: Yes, the respondent must answer this question to continue

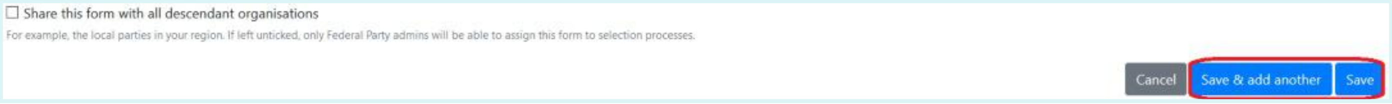
Type the question you want to ask into the “Question” box. To add more questions, click “Add another” again. To delete a question, click the “X” above the “Required” drop-down.



Step 5

If you are a Regional, State or Federal user, you can opt to share your new form with all the organisations below your own in the hierarchy (for example, all the local parties in your Region). Click “Share this form with all descendant organisations” to do so.

When your form is complete, click “Save” or “Save and add another” to create a new form.

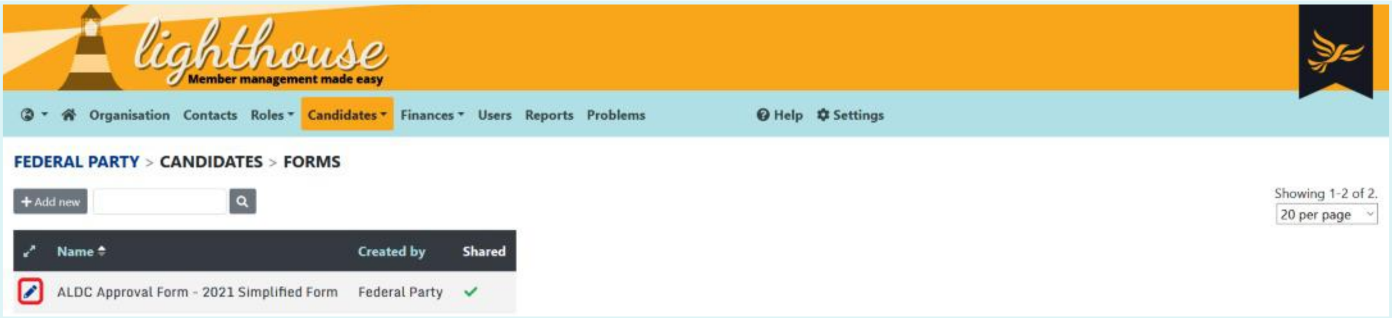


☐ Share this form with all descendant organisations

For example, the local parties in your region. If left unticked, only Federal Party admins will be able to assign this form to selection processes.

Step 6

You will be directed back to the Forms page. To edit a form, click the pencil icon next to the form's name in the table.



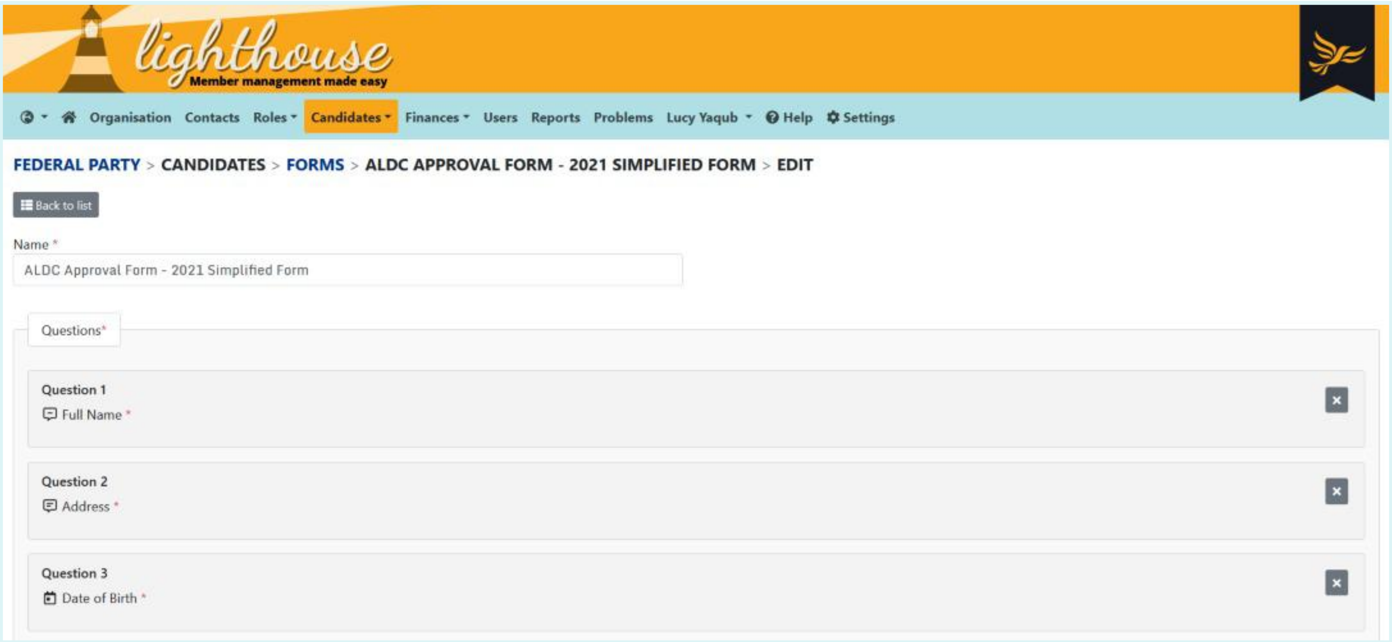
FEDERAL PARTY > CANDIDATES > FORMS

Showing 1-2 of 2.
20 per page

Name	Created by	Shared
ALDC Approval Form - 2021 Simplified Form	Federal Party	✓

Step 7

You will be directed to the edit page. To edit a question, click the grey box it is in.



FEDERAL PARTY > CANDIDATES > FORMS > ALDC APPROVAL FORM - 2021 SIMPLIFIED FORM > EDIT

Name *
ALDC Approval Form - 2021 Simplified Form

Questions*

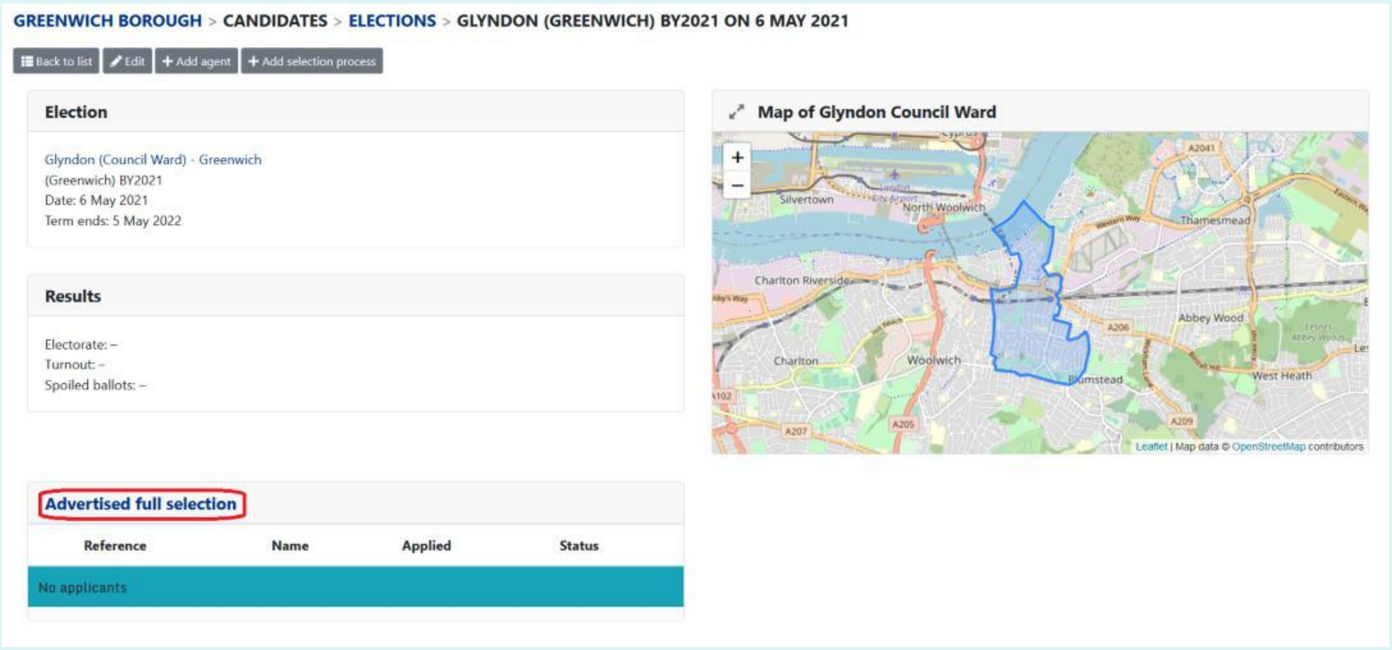
Question 1
Full Name *

Question 2
Address *

Question 3
Date of Birth *

Step 1

After creating your selection process, you will be returned to the detail page for the relevant local election. To create a short-listing committee, click on the selection process at the bottom of this page.



GREENWICH BOROUGH > CANDIDATES > ELECTIONS > GLYNDON (GREENWICH) BY2021 ON 6 MAY 2021

Election

Glyndon (Council Ward) - Greenwich (Greenwich) BY2021
Date: 6 May 2021
Term ends: 5 May 2022

Map of Glyndon Council Ward

Results

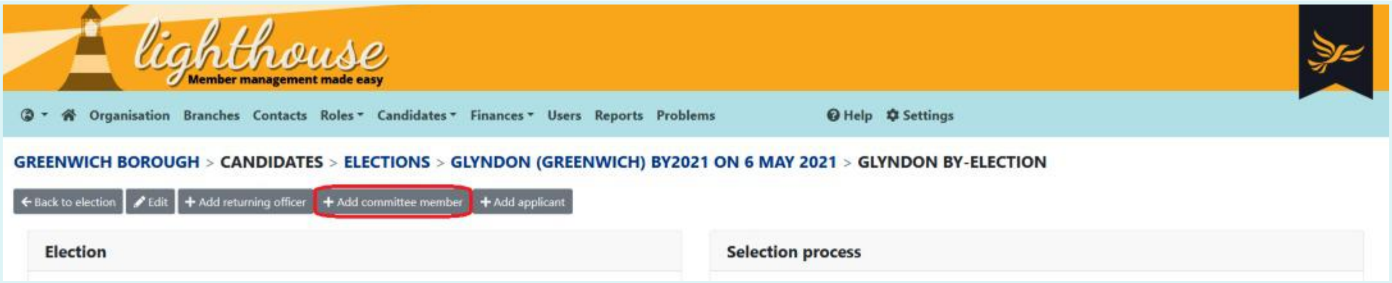
Electorate: –
Turnout: –
Spoiled ballots: –

Advertised full selection

Reference	Name	Applied	Status
No applicants			

Step 2

You will be directed to the selection process detail page. To add a member of the short-listing committee click ‘Add committee member’ at the top of the selections page.



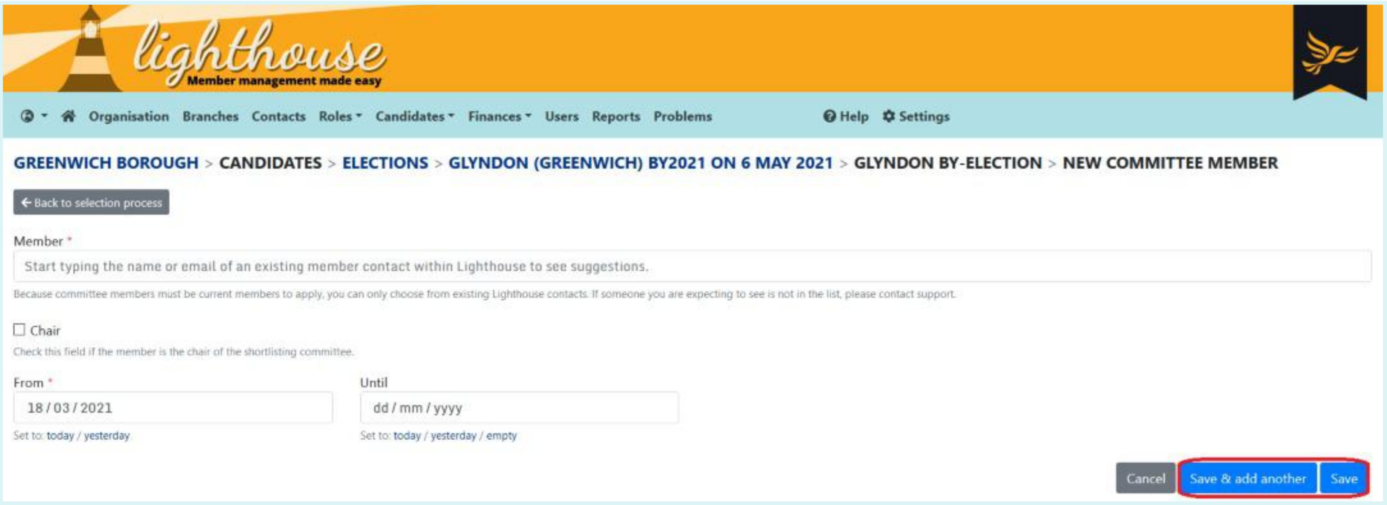
GREENWICH BOROUGH > CANDIDATES > ELECTIONS > GLYNDON (GREENWICH) BY2021 ON 6 MAY 2021 > GLYNDON BY-ELECTION

Election

Selection process

Step 3

You will be directed to the new committee member page. To add the member, type their name into the Member box. This will generate a list of members, from which you can select the correct person. Members within your local party will appear at the top of the list. If a member is not in your local party, you can still add them to your short-listing committee.



GREENWICH BOROUGH > CANDIDATES > ELECTIONS > GLYNDON (GREENWICH) BY2021 ON 6 MAY 2021 > GLYNDON BY-ELECTION > NEW COMMITTEE MEMBER

Member *
Start typing the name or email of an existing member contact within Lighthouse to see suggestions.
Because committee members must be current members to apply, you can only choose from existing Lighthouse contacts. If someone you are expecting to see is not in the list, please contact support.

☐ Chair
Check this field if the member is the chair of the shortlisting committee.

From *: 18 / 03 / 2021
Set to: today / yesterday

Until: dd / mm / yyyy
Set to: today / yesterday / empty

If the member you are adding is the Chair of the short-listing committee, you can tick the box that says ‘Chair’. You can only have one chair of each short-listing committee.

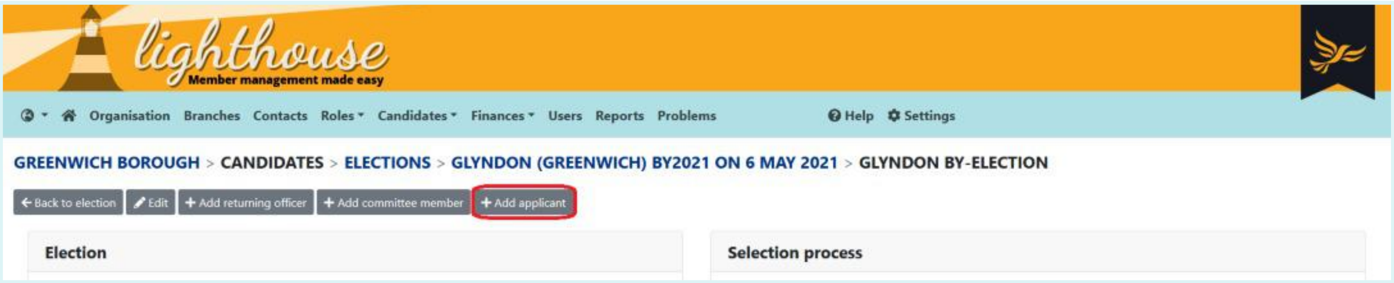
Select the start and end dates for the short-listing committee member to be in post. You can do this by typing in the date into the boxes, or by clicking the calendar icon.

Next, click “Save”, or “Save and add another” to add a new short-listing committee member.

How to create an applicant

Step 1

You can add applicants from the selection process detail page. To do so, click ‘Add applicant’ at the top of the selection page.



GREENWICH BOROUGH > CANDIDATES > ELECTIONS > GLYNDON (GREENWICH) BY2021 ON 6 MAY 2021 > GLYNDON BY-ELECTION

Election

Selection process

Step 2

You will be directed to the new applicant page. To add a member as an applicant, type their name into the Member box. This will generate a list of members, from which you can select the correct member.

Members within your local party will appear at the top of the list. If a member is not in your local party, you can still add them as an applicant.

GREENWICH BOROUGH > CANDIDATES > ELECTIONS > GLYNDON (GREENWICH) BY2021 ON 6 MAY 2021 > GLYNDON BY-ELECTION > NEW APPLICANT REQUEST

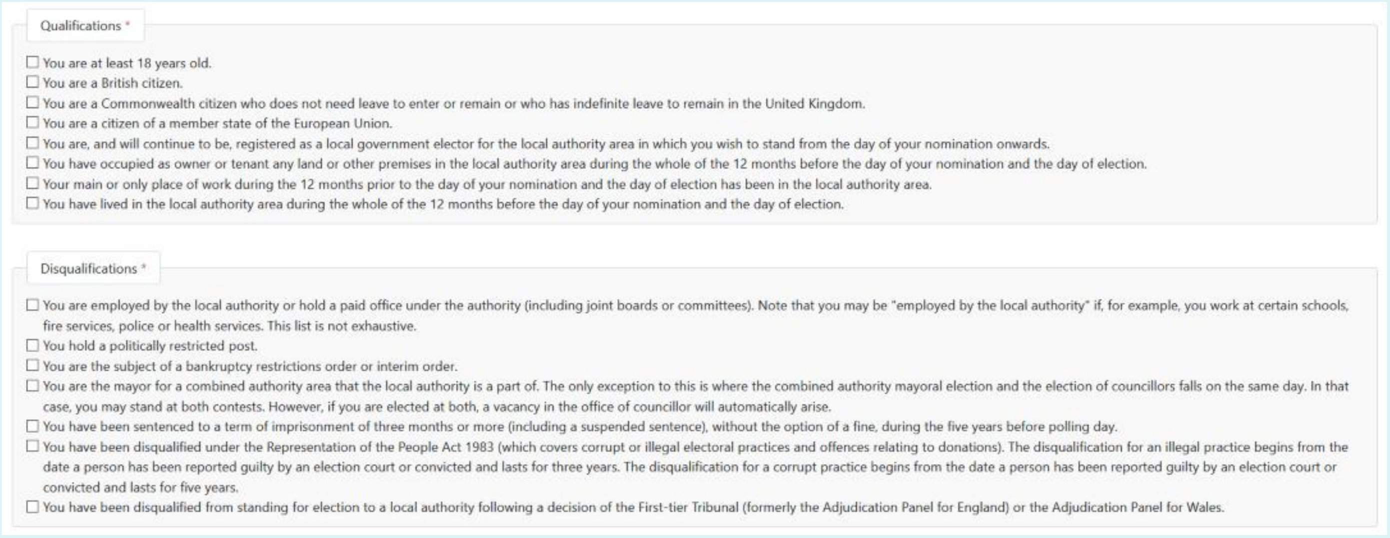
Member *

Start typing the name or email of an existing member contact within Lighthouse to see suggestions.

This selection process is open to . You can only choose from existing Lighthouse contacts. If someone you are expecting to see is not in the list, please contact support.

Step 3

Go through the lists of qualifications and disqualifications and tick any that are applicable. This will let you know if that member is eligible to stand in the selection. If they are not, a warning will appear to let you know they are ineligible. You will still be able to add them as an applicant, as they might be able to become eligible.



Qualifications *

☐ You are at least 18 years old.
☐ You are a British citizen.
☐ You are a Commonwealth citizen who does not need leave to enter or remain or who has indefinite leave to remain in the United Kingdom.
☐ You are a citizen of a member state of the European Union.
☐ You are, and will continue to be, registered as a local government elector for the local authority area in which you wish to stand from the day of your nomination onwards.
☐ You have occupied as owner or tenant any land or other premises in the local authority area during the whole of the 12 months before the day of your nomination and the day of election.
☐ Your main or only place of work during the 12 months prior to the day of your nomination and the day of election has been in the local authority area.
☐ You have lived in the local authority area during the whole of the 12 months before the day of your nomination and the day of election.

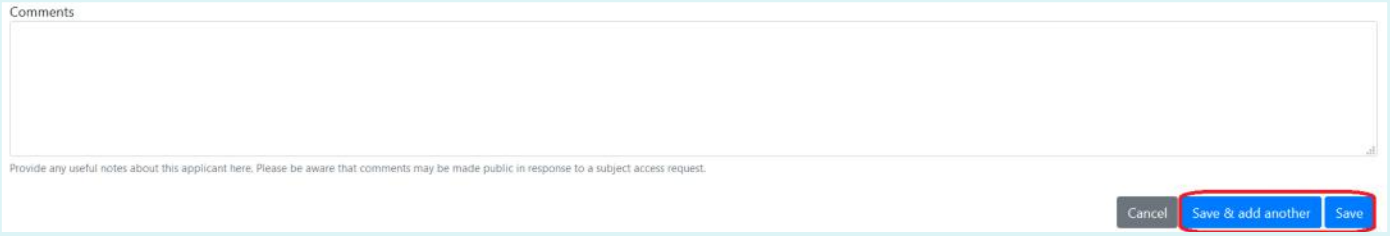
Disqualifications *

☐ You are employed by the local authority or hold a paid office under the authority (including joint boards or committees). Note that you may be "employed by the local authority" if, for example, you work at certain schools, fire services, police or health services. This list is not exhaustive.
☐ You hold a politically restricted post.
☐ You are the subject of a bankruptcy restrictions order or interim order.
☐ You are the mayor for a combined authority area that the local authority is a part of. The only exception to this is where the combined authority mayoral election and the election of councillors falls on the same day. In that case, you may stand at both contests. However, if you are elected at both, a vacancy in the office of councillor will automatically arise.
☐ You have been sentenced to a term of imprisonment of three months or more (including a suspended sentence), without the option of a fine, during the five years before polling day.
☐ You have been disqualified under the Representation of the People Act 1983 (which covers corrupt or illegal electoral practices and offences relating to donations). The disqualification for an illegal practice begins from the date a person has been reported guilty by an election court or convicted and lasts for three years. The disqualification for a corrupt practice begins from the date a person has been reported guilty by an election court or convicted and lasts for five years.
☐ You have been disqualified from standing for election to a local authority following a decision of the First-tier Tribunal (formerly the Adjudication Panel for England) or the Adjudication Panel for Wales.

Step 4

Next, add any comments in the box at the bottom of the page. Please be aware that these can be made public in response to a subject access request.

Once you are finished, click "Save", or "Save and add another" to add a new applicant.



Comments

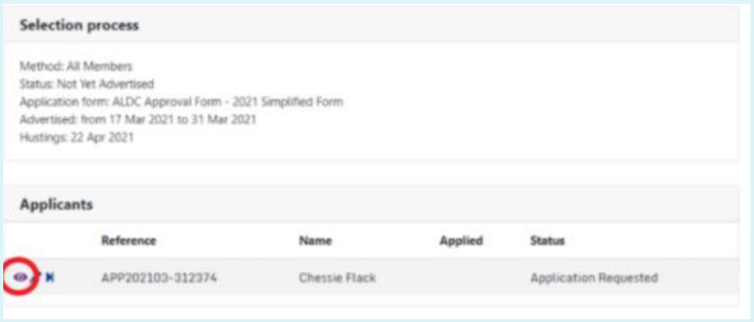
Provide any useful notes about this applicant here. Please be aware that comments may be made public in response to a subject access request.

How to move applicants through a selection process

Step 1

Once all the applicants and short-listing committee members have been added, you can move the applicants through the selection process. To do this, navigate to the selection process page.

To view the details of the applicant, and to move them through the selection process, click the eye icon next to their name, on the selection page.



Selection process

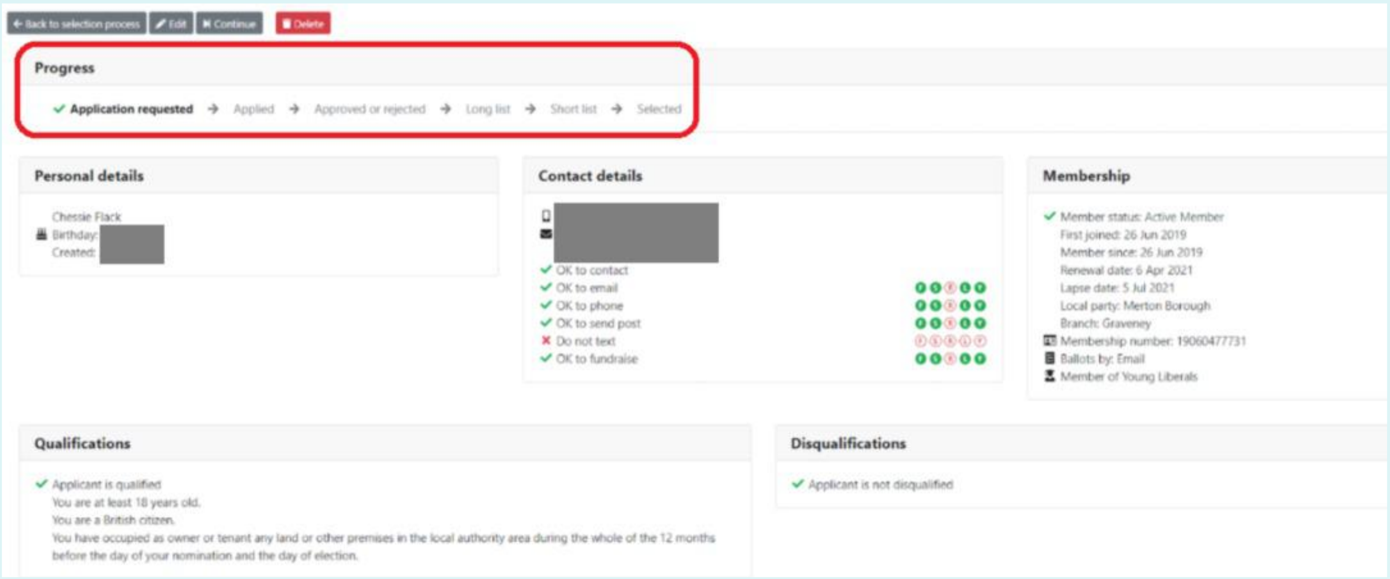
Method: All Members
Status: Not Yet Advertised
Application form: ALDC Approval Form - 2021 Simplified Form
Advertised: from 17 Mar 2021 to 31 Mar 2021
Hustings: 22 Apr 2021

Applicants

Reference	Name	Applied	Status
APP202103-312374	Chessie Flack		Application Requested

Step 2

You will be directed to the applicant page. You can see where the applicant is in the process in the bar across the top.



Progress

✓ **Application requested** → Applied → Approved or rejected → Long list → Short list → Selected

Personal details

Chessie Flack
Birthday: [redacted]
Created:

Contact details

[redacted]
✓ OK to contact
✓ OK to email
✓ OK to phone
✓ OK to send post
✗ Do not text
✓ OK to fundraise

Membership

✓ Member status: Active Member
First joined: 26 Jun 2019
Member since: 26 Jun 2019
Renewal date: 6 Apr 2021
Lapse date: 5 Jul 2021
Local party: Merton Borough
Branch: Graveney
Membership number: 19060477731
Ballots by: Email
Member of Young Liberals

Qualifications

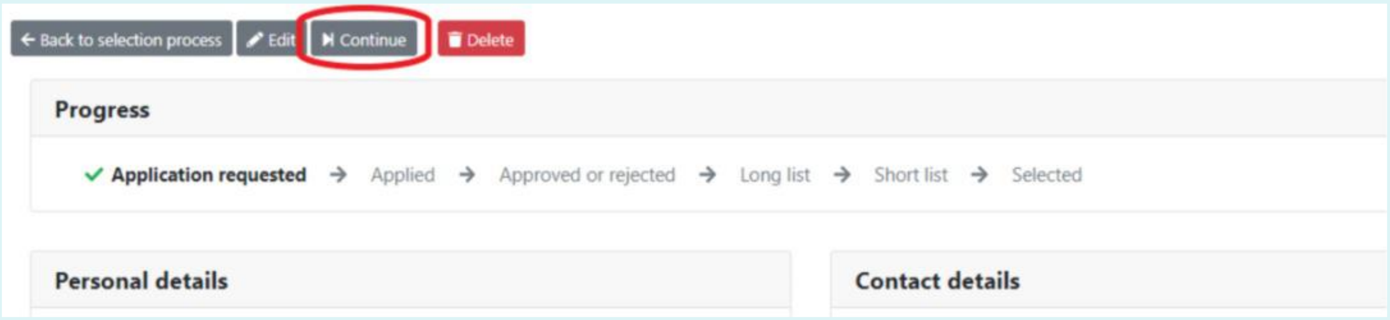
✓ Applicant is qualified
You are at least 18 years old.
You are a British citizen.
You have occupied as owner or tenant any land or other premises in the local authority area during the whole of the 12 months before the day of your nomination and the day of election.

Disqualifications

✓ Applicant is not disqualified

Step 3

Once you have received the application from the applicant, click ‘continue’.



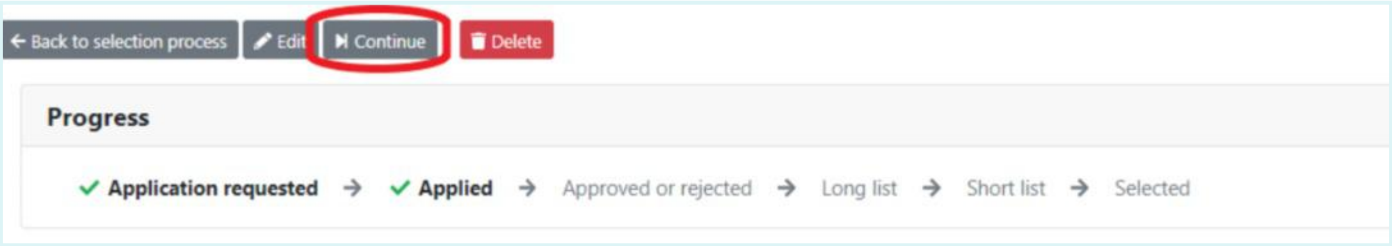
You will be directed to complete the application form. You can upload this as a PDF or copy the answers of the applicant into the form.

Click ‘Continue’ at the bottom of the page to add the completed form. You can add comments at each stage of the application.

Step 4

This will direct you back to the applicant page. You will be able to see the progress of the applicant in the bar across the top.

Click ‘Continue’ to add whether the application has been approved or rejected.



Step 5

Use the drop-down menu to indicate whether the applicant has been approved or rejected. If the applicant has been rejected, state why in the comments box. Please be aware that comments may be made public in response to a subject access request.

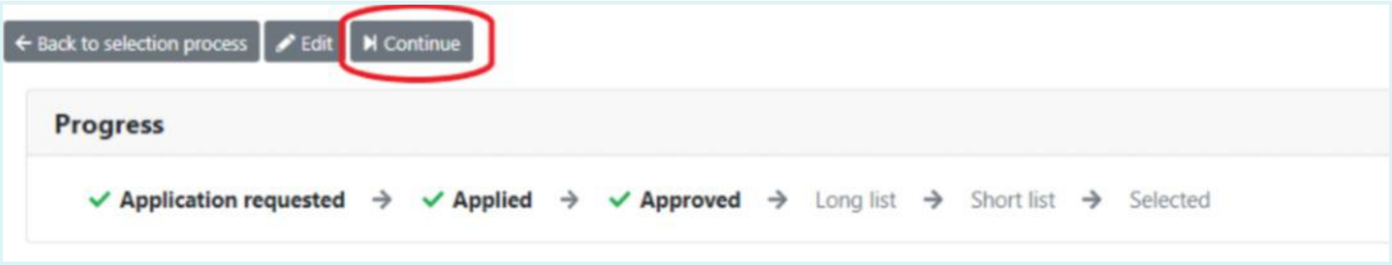
GREENWICH BOROUGH > CANDIDATES > ELECTIONS > GREENWICH WEST - BY2021 ON 6 MAY 2021 > GREENWICH WEST - BY2021 > CHESSIE FLACK > APPROVE OR REJECT APPLICANT

Approve or reject this applicant *: Approve

Click ‘Continue’ to go back to the applicant page.

Step 6

If the applicant has been approved, you will then be able to add the applicant to the long list, by clicking ‘Continue’. At this stage you can add any useful comments on the applicant. Click ‘Continue’ again to add the applicant to the long list and go back to the applicant page.



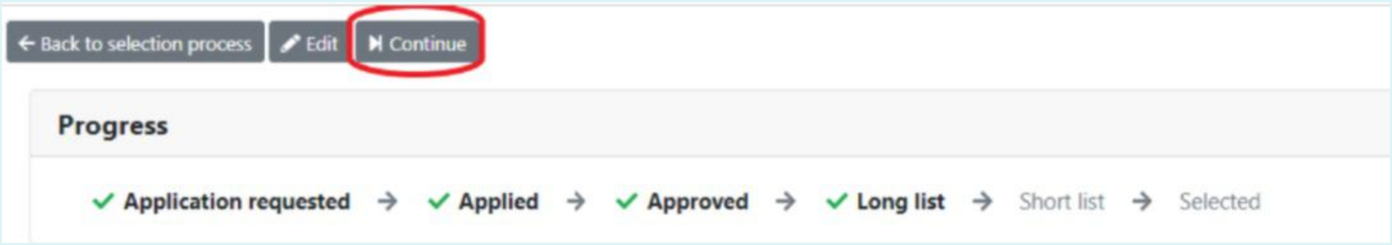
Progress

✓ Application requested → ✓ Applied → ✓ Approved → Long list → Short list → Selected

Step 7

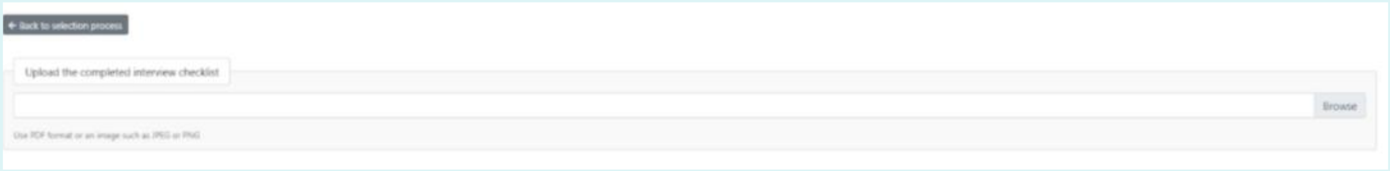
Once the applicant has made it to the long listing stage, they will have an interview conducted by the short-listing committee. If the applicant is successful in this interview click ‘continue’ on the applicant page.

If the candidate is not successful at the interview stage, leave the candidate as they are and do not click continue.



Step 8

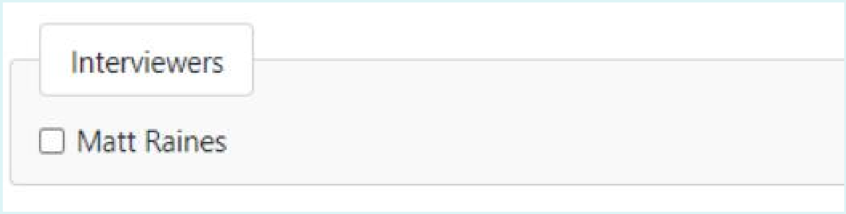
Upload a PDF of the completed interview checklist, so you can see if the applicant has been successful and any useful notes on the checklist.



Use PDF format or an image such as JPEG or PNG

Step 9

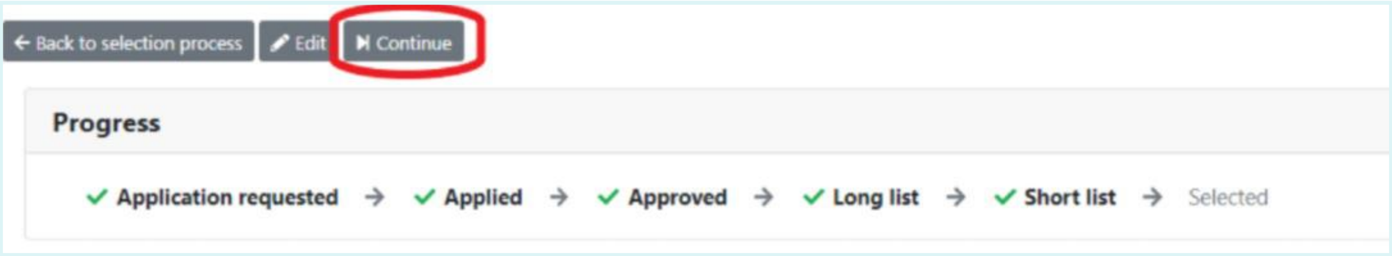
Select which members of the short-listing committee are on the interview panel. Only members of the short-listing committee should be interviewers.



Select 'Continue' if the applicant passed the short-listing interview, to add them to the shortlist.

Step 10

Once you have your list of short-listed applicants agreed with the Returning Officer and listed here, your RO will be able to open the selection to members to vote. When this has been completed, a winner has been declared, and any appeals are over, click 'continue' on the successful applicant.



Step 11

You will be directed to the page to confirm this applicant has been selected. Here you can add any comment about the successful applicant. Once you click 'Continue' here, this applicant will become the selected Candidate.


GREENWICH BOROUGH > CANDIDATES > ELECTIONS > GREENWICH WEST - BY2021 ON 6 MAY 2021 > GREENWICH WEST - BY2021 > CHESSIE FLACK > SELECT APPLICANT AS NEW CANDIDATE

Provide any useful notes about this applicant here. Please be aware that comments may be made public in response to a subject access request.

Step 12

If you make a mistake at any point, you can edit the applicant's information by clicking the pencil icon next to their name on the selection page.


Applicants

	Reference	Name	Applied	Status
	APP202103-312374	Chessie Flack		Application Requested

Alternatively, you can click 'Edit' on the applicant's page.