



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

Permissions needed

	View	Edit	Create
Data type of problem record	√		
	View	Edit	Create
Data type of problem record	✓		

• <u>How to view and update reported</u> problems



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.

lighthouse Member management made easy). Jez
③ ▼ 🌴 Organisation Branches Contacts Roles ▼ Finances ▼ Users Reports Problems 💿 Help	
HACKNEY BOROUGH > CONTACTS >	
🧮 Back to list 🖋 Edit 👔 Copy address change URL to clipboard 🙀 Report problem 🔒 Mark deceased	
Personal details Contact details	Membership

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".





Step 3

		_	
	Report a problem with this record	×)=
	Problem *	_	
3 - 4	Incorrect birthday	~	
HACKN	Existing value		
E Back to	Details *		
Dee			
Per			
L			
₩ E			
		.d	
	Prease provide any relevant information which will help us to tind or fix the prodiem nere. 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.	are	

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.



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.

Browse	Evidence required *		
			Browse

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 <u>Lighthouse</u>, you will be directed to the Dashboard page. Click on "Problems" in the blue menu bar at the top.

lighthouse Member management made easy	
Organisation Branches Contacts Roles Tinances Users Reports Problems	
HACKNEY BOROUGH	

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.

Â	lighthous). e easy			
3 - 🎢 Orga	nisation Branches Contacts Role	s * Finances * Us	ers Reports Problems	🕜 Help	
HACKNEY BO	ROUGH > PROBLEMS				
	Q Filter by status: all ope	en closed			
🖌 About	Description	Status Report	ed by Reported at	Assigned to Last updated 🕏	Response due
	Something else is wrong	new	4 Sep 2020 17:3	9	

Step 3

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

ACKNEY BOROUGH > PROBLEMS	> SOMETHING ELSE
Problem details	
Something else is wrong	
Problem reported by	on 4 Sep 2020 at 17
This is a problem report from Lighth	ouse about the following



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.

Comment		
lease 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	unter con cale as a constant construction as an obtaining of any Alexandre second as a second	
only check this how if you now consider the pro-	blem resolved	