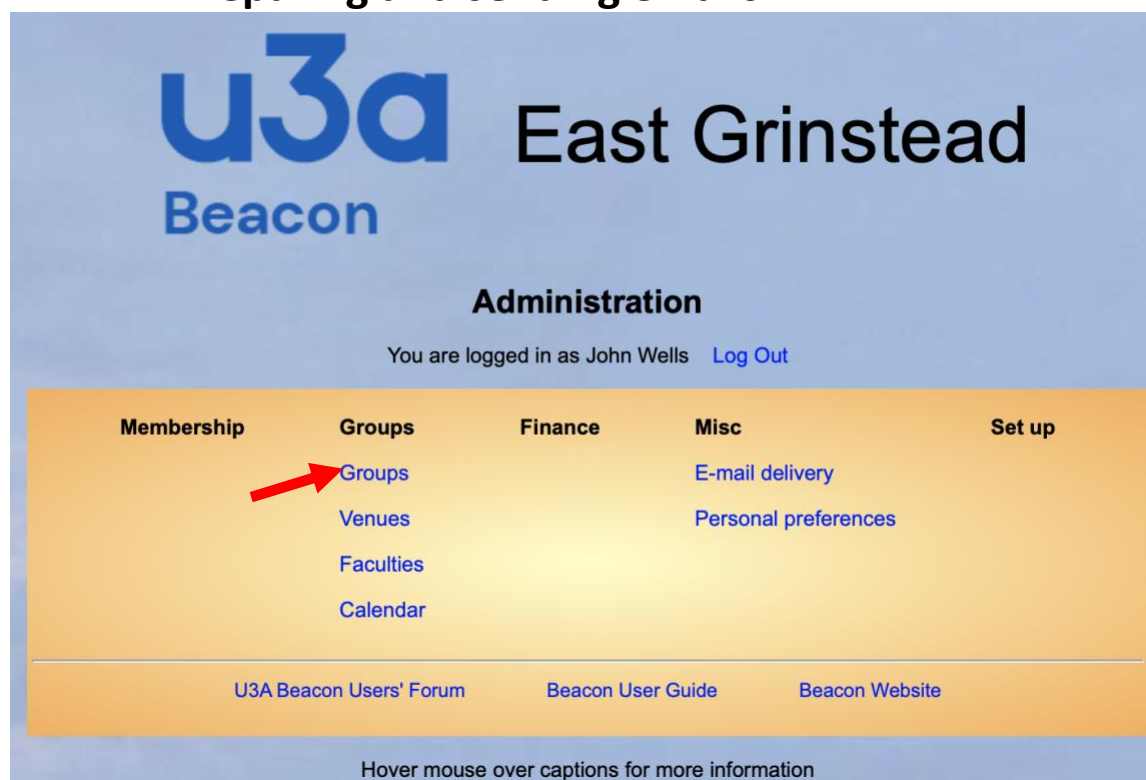# Getting started with Beacon – A HOW TO guide for group leaders in bite-sized steps

PART 4: Preparing and sending emails

Once logged in this is your MAIN MENU

As a GL you can use everything that is shown (in blue!) under the columns labelled GROUPS and MISC. You also have access to the three items shown below the line.

In PART 3 we focused on GROUPS

We will now look at emails in detail. By now you should be familiar with the list of members in your group, and the SELECT options. (If not, go back to PART 3 and revise)

There are several advantages of sending emails via Beacon:

1. The emails are always sent as blind copies, so no destinee sees other email destinee addresses. ***This means we comply fully with GDPR***
2. Each email can be personalised with the full details of the destinee
3. You can send hundreds of emails out at the push of a button, without them being treated as SPAM by the email distribution system
4. You can attach documents to your emails and also embed links to other sites
5. You can save standard email documents for reuse.
6. Remember that 93% of our members are on email

Preparing emails

Select	Member No.	Name	Address	Telephone	Mobile	Status			
☐	2021	Barbara Bird							remove - make leader
☐	1414	Paula Burrow							remove - make leader
☐	1033	Judith Evans							remove - make leader
☐	2334	Elizabeth Harrington							remove - make leader
☐	1193	Maureen Harris							remove - make leader
☐	2349	Nora Kempson							remove - make leader
		Waiting since 1st Nov 2021.	Join group						
☐	1550	Patt Lowe							remove - make leader
☐	1814	Diana Roud							remove - make leader
☐	1336	Valerie Wade							remove - make leader
☐	1182	John Wells	1 Tithe Orchard, Felbridge, RH19 2PH	01342 300960	07796 243446	Current	Leader	remove - cancel leader
		Emergency contact: Judith Wells 01342-300960 and 07766 794 869							
		Waiting since 5th Nov 2021.	Join group						
☐	1183	Judith Wells	1 Tithe Orchard, Felbridge, RH19 2PH	01342 300960	07766 794 869	Current	Leader	remove - cancel leader
		Emergency contact: John Wells 01342-300960 and 07796 243 446							
☐	1625	Helen Young							remove - make leader
Select	Member No.	Name	Address	Telephone	Mobile	Status			

Log into Beacon and select GROUPS➔Your group➔Members as in the above panel.

Select the target destinees either by checking individual records or by using the SELECT option at top LHS. Now click on "Do with selected" which will default to an email preparation screen as below. The main panel is where the email is written and there are the usual controls for formatting. Other features which are explained in detail overleaf include:

- Tokenisation to personalise emails
- Ensuring that you receive a copy of what was sent
- How to add links to other internet sites
- Attaching documents
- Creating, saving and retrieving standard emails

The email preparation screen
Once you have clicked on "Do with selected" you will see this screen

You can see that the email is going to be sent to 11 destinees. Leave the "Tick to receive a copy" box ticked to ensure that you get a copy sent to your own INBOX.
Now you can compose the email in the panel below.

Send E-mail

From   John Wells<groups@eastgrinsteadu3a.co.uk>

To   Barbara Bird <barbarabird20@gmail.com>
Paula Burrow <whitexthr@btinternet.com>
Judith Evans <j.evans664@btinternet.com>
Elizabeth Harrington <elizabethharrington13@yahoo.co.uk>
Maureen Harris <mahgeorgie@hotmail.com>
Nora Kempson <nora.kempson@hotmail.com>
Patricia Lowe <patt.lowe@btinternet.com>
Diana Roud <dianardee@yahoo.co.uk>

11 addressee/s

☑ Tick to receive copy

Load standard message

Attachments   Choose Files   no files selected

Subject

Formats ▾ **B** *I* ≡ ≡ ≡ 🔗 ≔ ≔ ⇤ ⇥

p

Send   Save as standard message

To insert or edit website links, you must use the 🔗 **tool above.**
Set URL to the full website address and Text to Display to the text that the user should click
Do **NOT** display the website address

You may personalise this message with the following tokens:

- #TITLE - member's details
- #FORENAME
- #SURNAME
- #FAM - familiar name
- #MEMNO - membership number
- #EMAIL
- #TELEPHONE
- #MOBILE
- #EMERGENCY - emergency contact
- #AFFILIATION
- #RENEW - renewal date
- #FEE - renewal fee
- #MEMCLASS - membership class
- #GIFTAID - gift aid date
- #ADDRESSH - address in 1 line
- #ADDRESSV - address over several lines
- #POSTCODE
- Partner's details...
- #PTITLE
- #PFORENAME
- #PSURNAME
- #PFAM - familiar name
- #PMEMNO - partner mem num
- #TODAY - today's date
- #U3ANAME - this U3A's name

- **Leave "Tick to receive a copy" checked** in order to send a copy to your own INBOX
- **The destinees you have chosen are listed in the "To" panel**
- **To attach one or more files, click on "Choose files"** and select files for attachment
- **Subject: Give your email a title.**
- **To include a link to another site you must NOT type it directly in the text.** First position your cursor at the insertion point. Then click on the arrowed chain symbol. Copy the URL of the site into the **TOP** line of the box that appears, and your text to be displayed in the **SECOND** line. The result will be the insertion of a link in the body of the email.
- **Personalise your email with any of the tokens listed on the RHS**. You must always type the token as listed. Thus typing **"#TITLE #FORENAME #SURNAME"** will result in an email to me being addressed as "Mr John Wells" or to Paula Burrow as "Mrs Paula Burrow"
- **HINT: If composing a lengthy email, test it first by selecting yourself as the destinee**, and SAVING it as a *standard message*. Press SEND and evaluate the resulting email which you will receive. If all is well, select the full list of destinees; load your saved standard email and SEND. If the standard email needed tweaking, first select your own email ID as destinee; recall the saved standard message; edit as necessary and SAVE again (don't forget to save!). SEND to yourself again. If all is well, repeat the exercise with the full list of destinees.)
- **Save standard messages that are to be kept with a title starting with the date in YYMMDD format.** Describe the email and add your initials, plus KEEP

Beacon for East Grinstead u3a – PART 4

Checking on delivery of emails

Use the Email delivery option from your main menu to check that all have been delivered. Any problems will be highlighted in RED. If an email ID signals that it is BLOCKED your Beacon ADMIN will know and will unblock it for you, once the reason for BLOCKING has been determined. But you will need to resend the email to the unblocked destinee.

You have now completed PART 4

Go to HOME and LOGOUT. You are now back at the Beacon login screen

Now use your browser BACK button to return to the page of links

Next step: PART 5 - Dealing with finances
Please continue with "Getting started with Beacon – PART 5"