



# Beacon Tutorial – for iU3A Group Coordinators

**May 2023**

**Rev. 03**



# Subjects Covered:

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## **Part A - Beacon For Group Coordinators**

1. Why Use Beacon?
2. How to Sign In
3. Select Your Group
4. Schedule
5. Group's Membership (Delete or Add)
6. Join a Group On-line
7. Emailing your Group Members
8. Standard Messages
9. Ongoing Support

## **If we have time:**

## **Part B - Beacon For Members**

1. How to Sign In (as a Member)
2. Update your personal details
3. Groups Schedule
4. Join a group
5. On-line Membership Renewal



## A1. Why Use Beacon?

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- Developed specifically for u3as. Over 500 u3as are using it. They all use it to varying degrees
- The main benefactors for the use of this database system is for the Membership Secretary and Groups Coordinator. However:
- Can be used for / by Treasurers
- Can be used by Group Coordinators
- Can be used by Members. But:
- How useful it is to Members is (partly) dependent on how much data Coordinators put into the system
- Therefore Coordinators are being asked to support the use of this System to maximise the benefits for all
- Members can access Beacon to: update their personal details; join groups; see the schedule of events for their groups.
- Benefits for Group Coordinators/Leaders are: covers them for GDPR, Insurance, ease of group management



## A2. How to sign in – Home Page

There are various ways to log in.

1. You can get to it through our iU3A website,

If you look at any of our main web pages, at the tabs along the top, you can see one called 'Members'. Click on that.





## A2. How to sign in – Home Page

This page will open. On the page you can see links for the Member log on:

& the Group Coordinators login (further down same page):

The screenshot shows the 'BEACON MEMBERS SYSTEM' home page. A red arrow points from the text 'On the page you can see links for the Member log on:' to the 'iU3A Members Login' section. Another red arrow points from the text '& the Group Coordinators login (further down same page):' to the 'Training for Group Coordinators' section. A blue cloud-shaped callout with the word 'here' is placed over the login link in the 'iU3A Members Login' section. Another blue cloud-shaped callout with the word 'here' is placed over the login link in the 'Training for Group Coordinators' section.

### BEACON MEMBERS SYSTEM

#### iU3A Members Login

If you are a current member of iU3A, you can click [here](#) to log in to the Members Portal.

You can use the Members' Portal to:

- Check and, if necessary, update your personal contact details. This includes addresses, telephone numbers, email addresses and emergency contact information. You are asked to do this whenever your information changes or at least once a year.
- View and/or download a personal calendar, showing your group meetings and iU3A's Monthly General Meetings.
- See the contact details for group coordinators.
- Enrol in a group online, providing the group coordinator allows this to be done

Editing access for the Administrators to all data fields.

#### Training for Group Coordinators

The login for Group Coordinators is found [here](#).

There is support for the Group Coordinators in their use of Beacon. A tutorial has been prepared and circulated but can also be reached [here](#). Face-to-face training is available through Mary Harris.

Further information for Coordinators is available [here](#). If you want to look up a particular aspect try the full User Manual [here](#).

If you have any IT queries on Beacon then you can use the following contact [here](#).

Coordinators guidance regarding GDPR can be viewed [here](#).



## A2. How to sign in – Home Page

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2. Or you can find it on the internet directly. Its address is:

<https://www.u3abeacon.org.uk/password.php>

Type this into your browser (or copy & paste) and it will open the following internet page (next slide):



## A2. How to sign in (as a Coordinator) – Home Page

1. Select Islington from drop down menu. Will probably remember this for you next time
2. Username: type in user name issued to you
3. Password: type in the one issued to you.
4. Hit the enter button

**NOTE: some browsers will save your credentials making log in even easier next time.**

**NOTE: the option at the bottom if you can't remember your details.**

u3a  
Beacon

**Administration**

U3A

Username

Password

Passwords are case sensitive

Forgotten your username or password? [Click here.](#)



## A2. Sign In – Then Select Your Option

The screenshot shows the u3a Islington Beacon Administration page. At the top, the logo 'u3a Islington Beacon' is displayed. Below it, the word 'Administration' is centered. A message states 'You are logged in as Derek Harwood' with a 'Log Out' link. The main content area is divided into five columns: Membership, Groups, Finance, Misc, and Set up. The Groups column contains links for Groups, Venues, Faculties, and Calendar. The Finance column contains links for Ledger (by account), Ledger (by category), Ledger (by group), Add transaction, Transfer money, Credit batches, Reconcile account, and Financial statement. The Misc column contains links for E-mail delivery and Personal preferences. The Set up column contains links for Finance accounts and Finance categories. Annotations include: a box on the left stating 'This is the HOME page. What option do you want now?'; a box on the right stating 'You should return to this page at the end of your session and log out' with an arrow pointing to the Log Out link; a box on the left stating 'Today only looking at 2 of the options:' with arrows pointing to the Groups and Calendar links; and a box on the right stating 'In your own time, have a look at these options.' with an arrow pointing to the Personal preferences link. At the bottom, there is a 'Help' button and three links: 'U3A Beacon Users' Forum', 'Beacon User Guide', and 'Beacon Website'.

**u3a Islington Beacon**

**Administration**

You are logged in as Derek Harwood [Log Out](#)

**Membership**

**Groups**

[Groups](#)

[Venues](#)

[Faculties](#)

[Calendar](#)

**Finance**

[Ledger \(by account\)](#)

[Ledger \(by category\)](#)

[Ledger \(by group\)](#)

[Add transaction](#)

[Transfer money](#)

[Credit batches](#)

[Reconcile account](#)

[Financial statement](#)

**Misc**

[E-mail delivery](#)

[Personal preferences](#)

**Set up**

[Finance accounts](#)

[Finance categories](#)

[Help](#)

[U3A Beacon Users' Forum](#) [Beacon User Guide](#) [Beacon Website](#)

Note also the functions at the bottom. A HELP function – to take you to parts of the Beacon User Guide; or a link to the Forum where you can post a query or read other posts; or a link to the 'Beacon Website' where you can find out more about Beacon in general.





## A3. Select Your Group (note how your Group appears)

Use the alphabetic index at the top or

scroll down to your group name. Your group will be highlighted in blue. Click on its title to open.

You'll only have access to your own group(s)

NOTE: Max group size is listed here, current group size & numbers on waiting list (ie new members)

u3a Beacon Islington

Home

Groups

Faculty - any or none - ☐ Show active only

Operations at bottom of page

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

	Active	When	Where	Coordinators	Members	Max	Waiting
in 21st Century	Y	1630 on Wednesdays every fortnight		Georgia Lepper	14		
				Vivek Nanda			
London	Y	Once per month	Not fixed	Denise Reardon	120	150	3
ad Painting & g	Y	Monday 10:30, every two weeks		Gill Hopkins	9	9	1
Art: Life Drawing	Y	Every Monday		Alison Shipton	20	22	
B							
Birdwatching	Y	Two visits per month	Not fixed	Janet Drake	96	500	
				Derek Harwood			
Book Group - German	Y	Monday at 10:00, approx every 6 weeks	Gay	Vivienne Gay	11	12	
Book Group - Rethink Economics	Y	Friday at 10:00, twice a month	Zoom	Valerie Iles	11		
Book Group - Science Fiction	Y	Friday at 14:00, every five or six weeks	Evans	Jenni Chan	7		
Book Group - Short Stories	Y	2nd Thursday of each month at 10:30	Morris	Gwen Morris	9	8	1
Book Group -Mid 20th Century 1	Y	2nd Thursday at 14.00	Canonbury Tavern	Liz Savage	6	10	
Book Group -Mid 20th Century 2	Y	2nd Friday at 11:00	Rochester Castle	Liz Simpson	6	9	

06/08/2023

9



## A3. Select Your Group – & Choose an Option Page

It will open on this page, the 'Details' page.

There are 4 Options/ Pages. Currently no iU3A group uses 'Ledger' so we won't look at that Option today.

We will look at:

- Details
- Schedule
- Members

Home - Groups List - Faculties - Venues

### Group Record for Birdwatching

Details Schedule Members Ledger

#### Group Details

atching

Status Active Max members 500

Allow members to join on-line ☒ Enable waiting list ☒ Notify coordinator of changes ☒

Visits per month

End time 16:30 Contact birdsui3a@gmail.com

venue Not fixed

Information

While we have over fifty signed up members, most of our visits we have about 6. So not too many to disturb the birds! We range from complete beginners to a few with some experience of birdwatching. New members are welcome, whatever their level of expertise. Group members share ideas they have for outings, and we do our best to follow up all of them. We try to have one local half day visit and one further afield longer day, per month.

Notes

No max set yet - monitor

Group record created 7 May 2017 19:27; last changed 8 Jun 2017 18:07

Save Record



## A3. Select Your Group – Details

You can change the info on this group Details page and ensure they are correct.

### Group Record for Birdwatching

DetailsScheduleMembersLedger

#### Group Details

Group	Birdwatching		
Faculty	<div></div>	Status	Active
		Max members	500
	<div><input checked="" type="checkbox"/> Allow members to join on-line</div> <div><input checked="" type="checkbox"/> Enable waiting list</div> <div><input checked="" type="checkbox"/> Notify coordinator of changes</div>		
When	Two visits per month		
Normal start time	09:30	End time	16:30
Contact	birdsui3a@gmail.com		
Venue	Not fixed		
Information	While we have over fifty signed up members, most of our So not too many to disturb the birds! We range from comp with some experience of birdwatching. New members are w level of expertise. Group members share ideas they have our best to follow up all of them. We try to have one l one further afield longer day, per month.		
Notes	No max set yet - monitor		
Group record created 7 May 2017 19:27; last changed 8 Jun 2017 18:07			
Save Record			

Don't change:

- 'Group' (name), as this matches your Web Page & other listings

You can tick / change:

- Max group members
- the 'Allow members to join on-line'
- 'Enable waiting list'
- Notify Changes

Or any other other data fields.

Remember to 'save Record'



## 4. Schedule

**Details** **Schedule** **Members** **Ledger**

**Group Schedule**

☐ Show Detail

Date & Time	Until	Venue	Topic	Enquiries
Date & Time	Until	Venue	Topic	Enquiries

**Add Events**

First date and time  then every

Until ☒ Number of events  ☐ Not beyond

End time  ☐ Exclude from public calendar

Venue  Enquiries

Topic

Details

To add a single event, set Number of Events to 1

You should set up the details of your Group's visit.

If you use the same Venue then it will probably be on the drop down listing. If not you can request your location to be added to the standard list.

Other fields are free format.

The intention by completing this page is members can directly see where your next meeting or visit will be.



## A4. Schedule, continued

When you first enter this screen there will be no events entered (this example shows one added).

To add an event follow the stages described on the next page.

U3A THE UNIVERSITY OF THE THIRD AGE

Islington

Home - Groups List - Calendar

Group Record for Book group 2

Details Schedule Members Ledger

Group Schedule

☐ Show Detail

Date & Time	Until	Venue	Topic	Enquiries	
Wed 15 Mar 2017 10:30	12:00	Dickson - map	Stet by Diane Athill	Book2.iu3a@gmail.com	edit delete
Date & Time	Until	Venue	Topic	Enquiries	

Add Events

First date and time: 18/02/2017 10:30 then every 2 Weeks

Until: ☒ Number of events 1 ☐ Not beyond 30/9/2017

End time: 12:00 ☐ Exclude from public calendar

Venue: Dickson Enquiries: Book2.iu3a@gmail.com

Topic:

Details:

To add a single event, set Number of Events to 1

Add Events

Home - Groups List - Calendar





## A4. Schedule, continued

- The default date that will show on “First date and time”. You change this by left clicking. A dialogue box opens and you can pick the date of your first event. You can set the date and the start time (hour & minutes). Once done remember to click “Done”.
- Next set recurring frequency. See next slide for more info on this.
- You can add just one event. Or if you have a set frequency you can set up the whole Series. Click on either number or end date.

Mail - Derek Harwood - O... x iU3A Groups x Group Record x +

https://www.u3abeacon.org.uk/groupschedule.php?key=2701

**U3A** THE UNIVERSITY OF THE THIRD AGE **Islington**

Home - Groups List - Calendar

**Group Record for Book group 2**

Details Schedule Members Ledger

**Group Schedule**

☐ Show Detail

Date & Time	Until	Venue	Topic	Enquiries
Wed 15 Mar 2017 10:30	12:00	Dickson - map	Stet by Diane Athill	Book2 iu3a@gmail.com
Date & Time	Until	Venue	Topic	Enquiries

**Add Events**

First date and time: 18/02/2017 10:30 then every 2 Weeks

☒ Number of events: 1 ☐ Not beyond: 30/9/2017

End time: 12:00 ☐ Exclude from public calendar

Venue: Dickson Enquiries: Book2.iu3a@gmail.com

Topic:

Details:

To add a single event, set Number of Events to 1

Add Events

Home - Groups List - Calendar



## A4. Schedule, continued

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Recurring Frequency (allowing for 5 week months):

- If your group meets, say, once a month, then it's straight forward – select 1 then Months
- If your group meets, say, twice a month, then you have to set up the first one (eg the 1<sup>st</sup> week of every month) – pick the date for the 1<sup>st</sup> meeting- then select 1 - then Months
- Once you set these up (clicked on Add Event), you need to then add your second meeting – pick the date for your first second meeting (eg the 3<sup>rd</sup> week of every month) – then select 1 – then Months. Again save, ie click on Add Event.
- In summary you will now have a listing showing meetings in eg the 1<sup>st</sup> & 3<sup>rd</sup> week of every month (regardless if there are 4 or 5 weeks in that month).



## A4. Schedule - Supplementary

The intention by completing this page is members can directly see where your next meeting or visit will be.

Note – another nice feature is 'Map' where Members can click on & see where the Venue actually is.



Islington

[Home](#) - [Groups List](#) - [Calendar](#)

Group Record for Book group 2

[Details](#) [Schedule](#) [Members](#) [Ledger](#)

Group Schedule

☐ Show Detail

Date & Time	Until	Venue	Topic	Enquiries	
Wed 15 Mar 2017 10:30	12:00	<a href="#">Dickson - map</a>	Stet by Diane Athill	Book2.iu3a@gmail.com	<a href="#">edit</a> <a href="#">delete</a>
Date & Time	Until	Venue	Topic	Enquiries	

Add Events

First date and time  then every

Until ☒ Number of events  ☐ Not beyond

End time  ☐ Exclude from public calendar

Venue  Enquiries

Topic

Details

To add a single event, set Number of Events to 1

[Add Events](#)

[Home](#) - [Groups List](#) - [Calendar](#)

Having set up a sequence, you can edit these individually at any time.

\*\*\*\*\*Then remember to click 'Add Events' when you've completed your update. \*\*\*\*\*





## A5. Group's Membership

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- One key purpose of Beacon is to ensure only paid up iU3A Members join Groups.
- When you select your Group it will list all the current group members (see next slide)
- Any showing in RED have not renewed and should be removed from your group (& advised they can no longer attend your group)
- This check will be particularly relevant around October/November each year when subscriptions are renewed
- There are two options if there is a iU3A member wishing to join your group:
  - initially (ie for now) you will become aware of this through other means (eg somebody sending you an email through your iU3A web page). You can then manually add this person to this list (see Slide 18)
  - Once members can access Beacon directly, and if you've ticked this option on your Beacon group home page (see slide 11), their name will appear in this list.
- If someone advises you they are dropping out of your group, you should remove their name from this list.
- Through this mechanism it will be known that only current iU3A members are members of groups, and at any time who is attending which groups



This lists all members.  
And their key data.  
You can tailor the list

## Schedule

## Members

## Ledger

☒ Joined members

☒ Waiting list

## Group Members

You can tailor  
the list

	No.	Name	Telephone	Mobile	Status		
<input type="checkbox"/>					Current		remove - make coordinator
<input type="checkbox"/>					Current		remove - make coordinator
<input type="checkbox"/>	16192				Current		remove - make coordinator
<input type="checkbox"/>		Emergency c					
<input type="checkbox"/>	15906				Current		remove - make coordinator
<input type="checkbox"/>		Emergency c					
<input type="checkbox"/>	16310				Current		remove - make coordinator
<input type="checkbox"/>	14337				Current		remove - make coordinator
<input type="checkbox"/>	16003				Current		remove - make coordinator
<input type="checkbox"/>	16347				Current		remove - make coordinator
<input type="checkbox"/>	13115				Current		remove - make coordinator
<input type="checkbox"/>	13006				Current		remove - make coordinator
<input type="checkbox"/>	16550				Current		remove - make coordinator

## Personal details blanked out for demo



## A5. Group's Membership - Check Membership

Personal details blanked out for demo

You can add new members here (only valid paid up members will show on the drop down list)

You can also remove members.

Members who've not paid their subscription fee will appear in red.

<input type="checkbox"/>	14409	Current	remove - make coordinator
<input type="checkbox"/>	13240	Current	remove - make coordinator
	gency		
	2	Current	remove - make coordinator
	9	Current	remove - make co
	gency		
	2	Current	remove - make co
	7	Current	remove - make co
	1	Current	remove - make co
	gency		
	4	Current	remove - make co
	4	Current	remove - make co
	gency		
	7	Current	remove - make co
	Emergency		
<input type="checkbox"/>	16065	Current	remove - make co
	Emergency		

Select

Member No.

Name

Telephone

Mobile

Status

Do with selected Send E-mail

96 members (0 selected)

Add member by name

- select member - Add

Add member by membership number

Separate numbers by commas

Add



## A5. Group's Membership – Add a member

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- Any member joining on line will be shown as 'Waiting' and you will get an email notification.
- You can then decide to let them into the group and change their listing status. See next slide



## A5. Group's Membership - Waiting

- Any member joining on line will be shown as 'Waiting' and you will get an email notification.
- You can then decide to let them into the group and change their listing status.

Shows as  
'waiting'

member joining on line will be shown as ‘Waiting’ and you will get on.

then decide to let them into the group and change their listing

<input type="checkbox"/>	Sandy Mifsud		Current	remove - make coordinator		
<input type="checkbox"/>	Alison Taggart		Current	remove - make coordinator		
<input type="checkbox"/>	Lindsay Topping		Current	remove - make coordinator		
<input type="checkbox"/>	Priscilla Trench		Current	remove - make coordinator		
<input type="checkbox"/>	Catherine Trillo		Current	remove - make coordinator		
<input type="checkbox"/>	Jeanette Tsang		Current	remove - make coordinator		
<input type="checkbox"/>	Molly Turner		Current	remove - make coordinator		
<input type="checkbox"/>	Margaret Versteeg		Current	remove - make coordinator		
<input type="checkbox"/>	Fran Walker		Current	remove - make coordinator		
<input type="checkbox"/>	Kate Wark		Current	remove - make coordinator		
<input type="checkbox"/>	Inge Weber-Newth	London, N1 2NN	020 7354 4613	07972 456266	Current	remove - make coordinator
	Waiting since 5th Mar 2017 <a href="#">Join group</a>					
<input type="checkbox"/>	Rosemary Weigand		Current	remove - make coordinator		
<input type="checkbox"/>	Robert Welsford		Current	remove - make coordinator		
<input type="checkbox"/>	Susan Welsford		Current	remove - make coordinator		
<input type="checkbox"/>	Anne Weyman		Current	remove - make coordinator		
<input type="checkbox"/>	Sylvia Whitehouse		Current	remove - make coordinator		
<input type="checkbox"/>	Michael Wright		Current	remove - make coordinator		
Select	Name	Address	Telephone	Mobile	Status	
	Do with selected	Send E-mail				
57 members (0 selected)						
Add member by name						
<div>- select member -</div> <div>Add</div>						
Add member by membership number						
<div></div> <div>Separate numbers by commas</div> <div>Add</div>						





## A6. Joining a Group On-line

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To allow on-line joining of your group you need to:

- sign in to Beacon as Coordinator, go to your page, it opens in 'Group Details'
- at the top tick:
  1. Allow Members To Join On-line',
  2. 'Enable Waiting List',
  3. 'Notify Coordinator of Changes'
- Re No. 3 above - gives you the email flag when someone signs up in Beacon
- Re No. 2 above – if you want to use this feature in the row above leave the 'Max Members' empty (see also Page 11). There is a bit of a glitch in the software so this is the way round it.
- Once you get the email notification that someone has signed up on-line you can, if you want to send them a standard welcome email (see later Slide).



## A6. Joining a Group On-line

**Group Record for Birdwatching**

**Details**   **Schedule**   **Members**   **Ledger**

**Group Details**

Group: Birdwatching

Faculty:  Status: Active  Max members: 500

☒ Allow members to join on-line   ☒ Enable waiting list   ☒ Notify coordinator of changes

When:

Normal start time:

Venue:

Information:

Notes:

**Save Record**

This is how to allow on line group membership, through Beacon.

Firstly the Group Coordinator needs to set the details as:

- Set the 'Max members' field
- Tick 'Allow members to join on line'
- Tick 'Enable waiting list'

Save the record



## A7. Emailing Your Group Members

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- If you need to contact a member by phone, eg because of a last minute change or cancellation, you will have access to this information in Beacon
- You can email all current group members (plus those on your waiting list) from Beacon (see next slide); select 'Members'
- All emails sent from Beacon are sent “blind” (same as the “bcc” option from your gmail group account). This ensures no release of personal data & compliance with our Privacy Policy
- When you select your Group it will list all the current group members with current email address and other details
- The Beacon email provider is more secure from hacking than using your own personal email account





## A7. Emailing Your Members

1

Mail - Derek Harwood - O... x iU3A Groups x Group Record

https://www.u3abeacon.org.uk/groupmembers.php?gkey=2701

U3A THE UNIVERSITY OF THE THIRD AGE Islington

Home - Groups List

Group Record for Book group 2

Details Schedule Members Ledger

Select	Name	Address	Telephone	Mobile	Status		
<input type="checkbox"/>	Isabel Dickson				Current	Coordinator	remove - cancel coordinator
<input type="checkbox"/>	Eva Eberhardt				Current		remove - make coordinator
<input type="checkbox"/>	Ros Lowe				Current		remove - make coordinator
<input type="checkbox"/>	Jill McKeown				Current		remove - make coordinator
<input type="checkbox"/>	Therese Melville				Current		remove - make coordinator
<input type="checkbox"/>	David Pashley				Current		remove - make coordinator
<input type="checkbox"/>	Susan Welsford				Current		remove - make coordinator
<input type="checkbox"/>	Mary White				Current		remove - make coordinator
<input type="checkbox"/>	Paul Williams				Current		remove - make coordinator

Personal details blanked out for demo

Do with selected Send E-mail

9 members (0 selected)

Add member by name

- select member - Add

Add member by membership number

Separate numbers by commas

Add

Home - Groups List

Tick all the boxes you want.

Or, use the SELECT button

Leave as 'Send E-mail' if that's what you want to do (but note other options here on the drop down like exporting email addresses)

Next you have to click on 'Do with selected'.



## A7. Emailing Your Members

Note: you can make the System send from your own personal email address or from iU3A group email address. Use the drop down at 'From'.

Best to tick for receiving a copy

Then compose your email (as any email system) & click SEND

### Send E-mail

From

Derek Harwood<derek.harwood@live.co.uk>  
Derek Harwood<website.manager@islingtonu3a.org>  
Derek Harwood<birds.iu3a@gmail.com>  
Derek Harwood<iu3alongerwalks@gmail.com>  
Derek Harwood<leisurewalks.iu3a@gmail.com>  
Derek Harwood<wineapp1.iu3a@gmail.com>  
Derek Harwood<events@islingtonu3a.org>  
Derek Harwood<computerhelp.iu3a@gmail.com>  
Derek Harwood<amblers.iu3a@gmail.com>

To

Mary Adshead <maryadshead@hotmail.co.uk>  
Diane Austin <diane46@live.co.uk>  
Joy Bailey <joy.bailey.angel@gmail.com>  
Pamela Ball <peterpamball@hotmail.co.uk>  
Catherine Barral <cathbar22@yahoo.co.uk>

5 addressee/s

☐ Tick to receive copy

Load standard message

Attachments 

Browse...

 No files selected.

Subject

Formats ▾

**B** *I*

You may personalise the 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
- #ADDRESSV - address over several lines
- #POSTCODE
- Partner's details...
- #PTITLE
- #PFORENAME
- #PSURNAME
- #PFAM - familiar name
- #PMEMNO - partner membership number
- #TODAY - today's date



## A7. Emailing Your Members

### More benefits:

There are several features ('tokens') where you can use the data in the system to personalise or automate your email creation. This is through the use of 'tokens' as listed on the right hand side of the email screen.

The most popular of these is #FORENAME. The use of this token means the email received by each member carries his/her name making it feel a more personal direct approach.

If using this option remember the token must be typed exactly as shown on the right hand list, eg it must be all in capitals.

### Cautions:

Beacon has a limit of 150 email addresses for attachments. So if you have a group size of over 150 members, it's best not to try to send them an attachment. Better to use a link to the file. This will mean using Google Drive, or other Cloud storage system. Or putting it on the website.

#### 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



## A8. Standard Emails

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- If you want to keep a regular email that you send to your group members from Beacon you can create & save this within Beacon
- Just follow the process for emails as explained in the previous few slides
- You can see on that screen there is box called 'Load standard message'
- If you select this you will see a drop down with a variety of messages already saved (by other iU3A Coordinators or Committee Members).
- You can use one of these and tweak it for your need or create an email from scratch
- Once you've created your email – with your preferred title (**which should always include your Group's name**) - you will see at the bottom of the screen an option called 'Save as standard message', click on that
- Your standard message is now saved to the list of templates so you can find and use it in the future.
- Note: these standard messages are common for all of Beacon, all Groups. They are not saved just to your Group's area. So don't mess up someone else's standard message!
- Please delete any old ones you've previously created but don't need now.



## A9. Ongoing Support

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- You are never alone! Isabel Dickson is iU3As Beacon Administrator and for any query can be reached on: [info.iU3A@gmail.com](mailto:info.iU3A@gmail.com)
- This tutorial is on-line on the 'Members' web page, for future reference & to allow you, at your own pace to explore the use of Beacon
- House calls can be provided for one to one training at your convenience. Please contact Isabel or Judith if you would like further training.