Contents

If you have downloaded this document, we suggest you check the Southwell U3A website from time to time to confirm that this is the latest version (the date of the last update is shown in the footer of each page).

A. Introduction

Emails
Emails may be sent from many places within Beacon, e.g. the main Members List, Group member lists, the U3A Offices page, etc. Emails can be personalised with the member's name, title, address, membership number, etc.

There is no practical limit to the number of attachments you can send with Beacon, but many email servers impose limits on the number or size of attachments that recipients can receive. It is wise, therefore, not to send more than a few attachments with any one message and to minimise attachment size. Also, to reduce the likelihood of emails being flagged as spam, it is recommended that attachments are not used when sending to a large number of recipients (over 50).
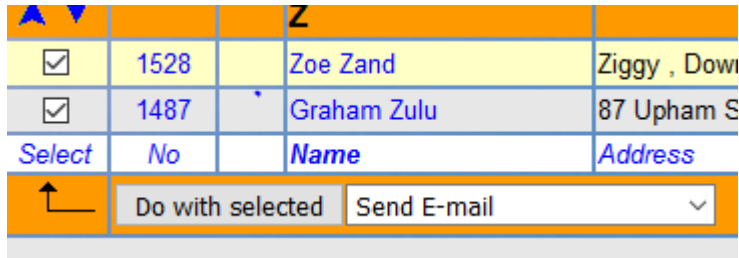
Notes:
- *Email recipients are blind copied, so they will not see the name or email address of the other recipients.*
- *There is a tick box where you can select to receive a copy of the email, although this is not necessary if you were one of the names selected in the list of members. A copy sent to self by ticking the box will not have the personalised details created from 'tokens' as described in Section [B]. Tokens are not available when sending an email from the U3A Officers page because the email addresses on that page are not linked to a Member Record (and may be different to the member's personal email address).*
- *When the recipients receive the email they can send a reply back to your email account.*
- *If you are not too familiar with using this facility it is worth sending a test email to yourself before sending it to the intended recipients.*

Letters
Personalised one page letters (or other documents) can also be produced. The functionality is similar to that for emails, except that the finished result is a pdf file containing individual letters/documents personalised for each of the selected members. A typical use is for generating a Membership Renewal application form for members that do not have email.

B. Email Messages

1. Locate a list of members and select the ones to whom you wish to send an email by ticking the box on the left hand side of the page against the appropriate names.

2. Choose **Send email** from the drop-down list below the table, followed by clicking on the '**Do with selected'**. box


3. Type the contents of the email in the message window that appears. Basic text formatting can be done using the buttons above the main body of the email.

    Note: if the email window is left open for a long time it may time out. Therefore long emails are best composed outside of Beacon before copy and pasting into Beacon.

4. The *tokens* listed on the right side of the browser can be used to personalise the email, e.g. typing **Dear #FAM** customises every email with the member's *Familiar Name*.

    Familiar Name is where a member is known by a different name to their forename (e.g. Bill instead of William). ***#FAM*** *should be used in emails, in preference to* ***#FORENAME.*** *If the Member's record does not detail a familiar name then Beacon defaults to using the usual forename***.**

5. Files can be attached by clicking the **Browse** button, selecting the file(s) from your computer followed by **Open**.

6. Clicking the chain-link icon enables links to **external websites** to be added. This is better than inserting the URL in the text because it reduces the likelihood of the email being flagged as spam.

7. When the email is ready to go, click **Send**.
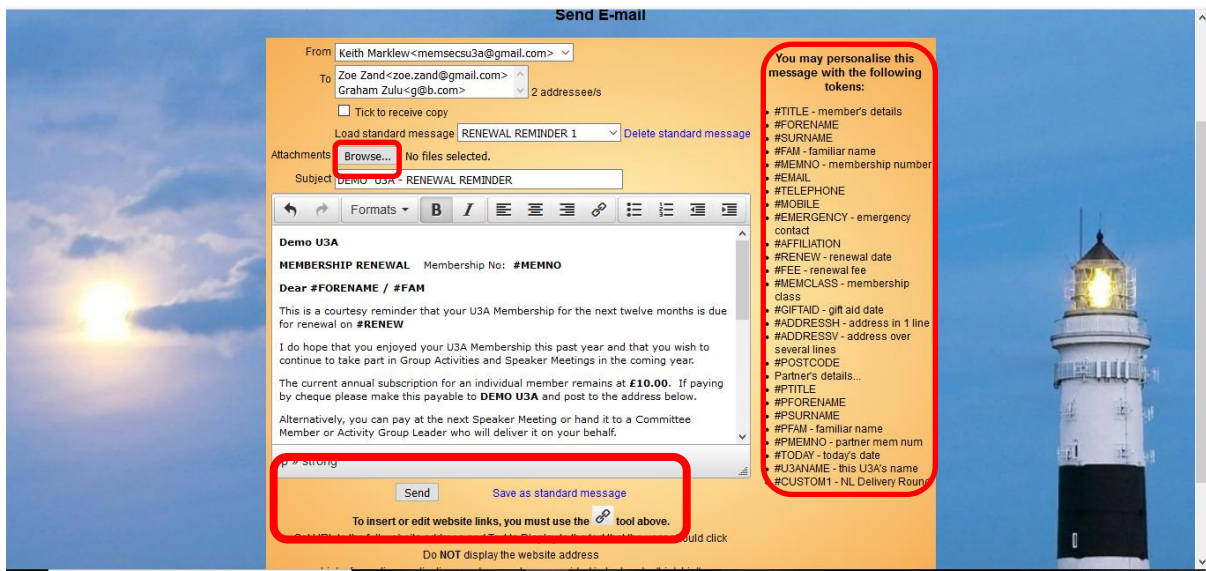
C. Standard Messages

1. To save an email as a template for future use, create the email as described above.

2. Click **Save as Standard Message**.
   New Standard messages should be named in a similar format to those below. If the message relates to a particular group, start with the name of the group followed by a dash.

Classical Music Study - Reminder
Classical Music Study - Welcome letter
Committee Meeting - Composite Document
Committee Meeting - Draft Minutes
Committee Meeting - Final Minutes
Committee Meeting - Report
Craft Group - Reminder
Cycling - Reminder
Grumpy Old Men - Next meeting
Membership - New Member Welcome
Membership - Records Update
Membership - Renewal Application
Membership - Renewal Confirmation
Membership - Renewal reminder for AGM
Newsletter - Deadline
Newsletter - Draft Calendar

3. To load a standard message, select it from the drop-down box at the top of the browser.
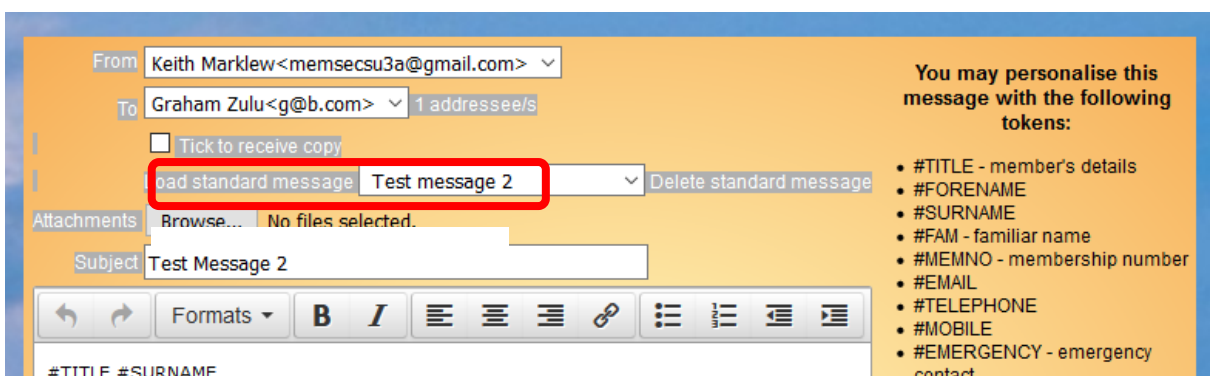
D. Email Delivery

To view the progress of your recently sent emails, click **Email Delivery** in the Home Page.

Click the email to see the status against each recipient:-

|	
Dispatched	Sent to the Beacon email agent.
Processed	Received by the Beacon email agent, but not yet forwarded on
Dropped	Rejected. This may be because the email address was in an invalid format.
Delivered	Accepted by the recipient's email provider
Deferred	The Beacon email agent is unable to establish communication with the recipient's email provider yet.
Bounced	Rejected by the recipient's email provider
Opened *	Received by the recipient who has downloaded it onto his/her computer.
Clicked	A website link within the message has been clicked on by the recipient. The link clicked is indicated.
Spam report	The message (or perhaps an attachment associated with it) has been rejected as spam. This is a serious situation that should be investigated immediately. Repeated spam reports will damage Beacon's reputation and could adversely affect all users. Refer to section [G] for more information about spam.

* Note: the fact that the status list doesn't show a recipient as having opened an email doesn't necessarily mean that they haven't opened the email. It all depends which email application the recipient is using and how the email was opened.

Beacon's mail agent (SendGrid) uses a hidden 1 pixel as its only means of detecting that an email has been opened. If a user switches off viewing images, as often is the case when reading an email in preview mode, then this detection method does not work.

E. Letters

This function can be used to create multiple one page letters and other one page documents that are personalised with members' details (Name, Address, Membership number, etc.).

1. Locate a list of members and select the ones that you wish to send a letter to.

2. Choose **Send Letter** from the drop-down list below the table followed by **Do with selected**.
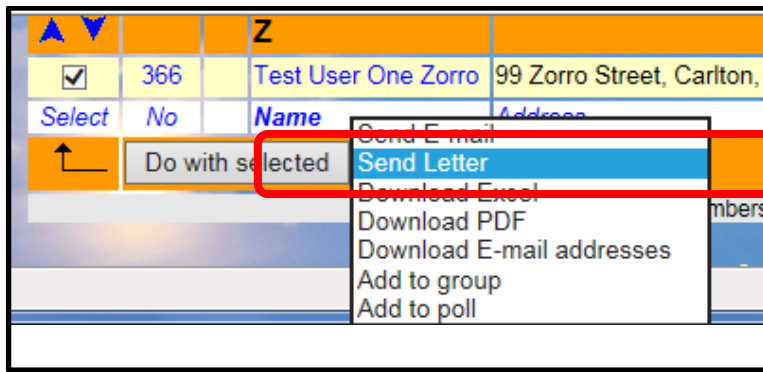
3. Type the contents of the letter in the browser. Basic text formatting can be done using the buttons above the main body of the letter.

   Note: if the letter browser is left open for a long time it may time out. Therefore long letters are best composed outside of Beacon before copy and pasting into Beacon.

4. The *tokens* listed on the right side of the browser can be used to personalise the letter, as described in Section **[B]**.

5. Click **Download** to open a pdf file containing customised letters addressed to each of the selected members.
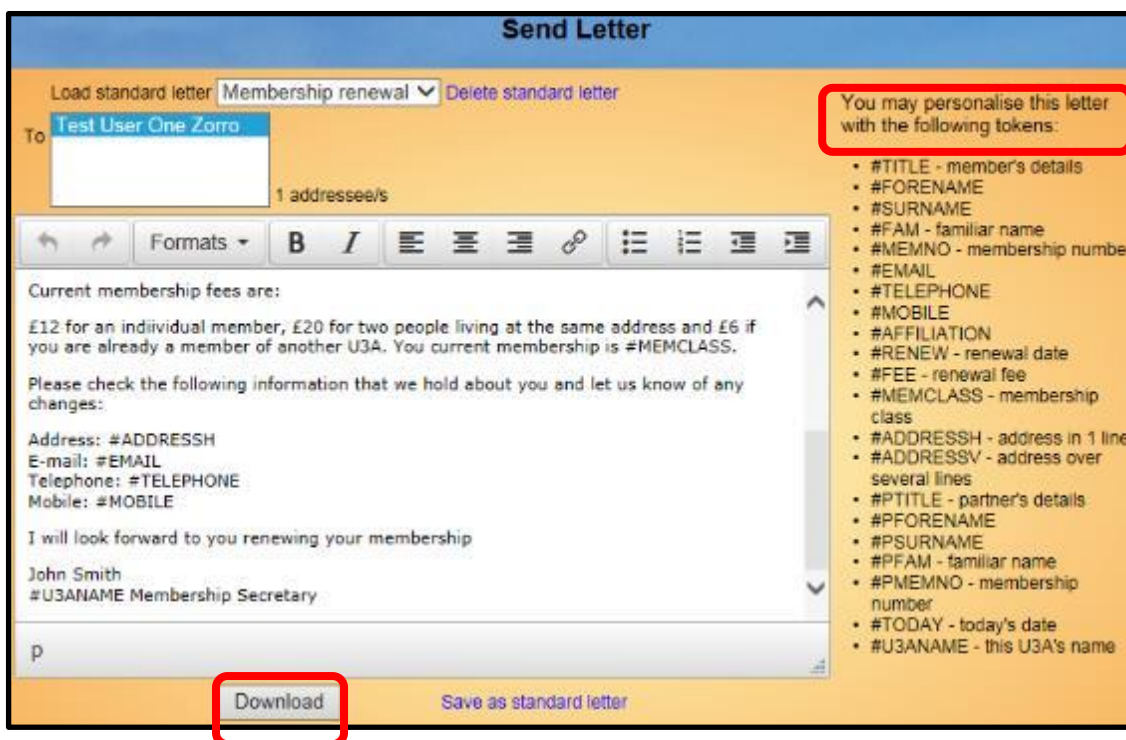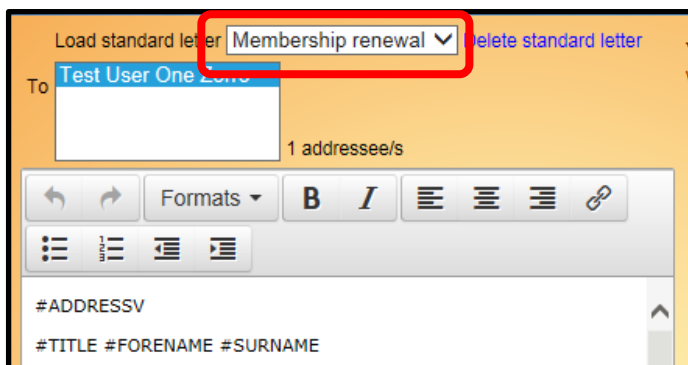

F. Standard Letters

1. To save a letter as a template for future use, create the letter as described above.

2. Click **Save as Standard Letter**.
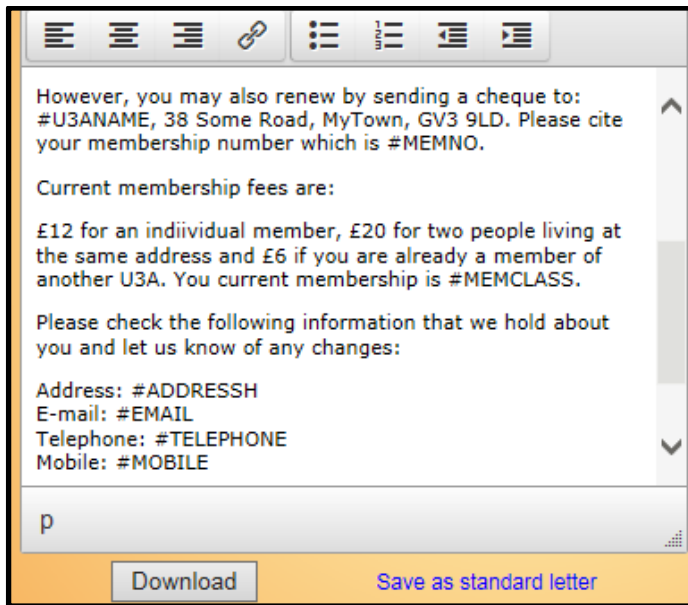
New Standard letters should be named in a similar format to that for standard emails shown in Section **[C].**

3. To load a standard message, select it from the drop-down box at the top of the browser.

G. Avoiding Spam

When sending emails to a large number of recipients there is a potential danger of the mail agent blocking the email because it suspects the email may be spam. This is especially likely with the Microsoft email applications - *Hotmail* and *Outlook.com*.

H. Revision Log

Rev.	Date	Section	Changes