

# Group Leader Instructions for Beacon

(14/10/2024)

- 1) Register/Login - You will first need to register for your Beacon account as a Group Leader even if you already have an account as an officer of the committee.

You will be sent an email with your user name and a temporary password.

Go to <https://u3abeacon.org.uk/password.php> and use the username and password that was sent in the email to login to Beacon.

You will be asked to change the password to one of your own choosing.

Tip: save the login page in your favourites.

- 2) When you're logged in the first window you will see is the one below.



Click "Personal Preferences".



Most of this is self explanatory.

If you're using your own computer you can increase the 'Session timeout' to the maximum of 99 minutes.

This might be handy because once you have reached the time limit in that box you will be logged out. So if you've composed an email and hit send you will be taken back to the home screen and your email will not be sent.

Tip: make sure you complete the work and save in the time you have before your session times out.

If you're close to the end of your session time it's better to logout and log back in and then complete your work.

- 3) Clicking Calendar; there is not much to do or see in here.

- 4) Clicking Group will show a list of all Verwood u3a Groups. Please do nothing on this page except clicking the group/s in the list that you are a Leader for.

- 5) Once you have clicked your group you will see the details of the group. In this case it's the Ukulele Group.



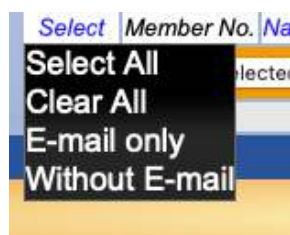
7) Clicking Groups in the Group Record window will take you to a list of your group members. If there are no members shown (other than your own details) you can add them by going to the 'Add member by name' section and click the ' - select member - ' button. You can then see all members of Verwood u3a, click on a name to add them to your group.

Or you can add members by their membership number. This way you can add more than one member at a time by separating member numbers with a comma.

Please make Sure to add only your group members.

**Adding members who are not a part of your group may result in access being terminated.**

8) Sending emails to your group. All emails will be sent using Bcc. This means that only the Leaders will see members email addresses.



Go to the bottom of your members list. Under the 'Tick Box' column click 'Select', you will now see a menu

Select All = All members are selected.

Clear All = Clears the selected.

E-mail only = All members with an email will be selected only

Without E-mail = Members without an email will be selected.



Once members are selected. If you want to send an email click 'Do with selected' button.

You can also download a member list by choosing this in the window on the right where 'Send E-mail' is now shown.

Email window:

**Personalise this e-mail using tokens. Click one to insert.**

Member		Member's Partner
#TITLE	Mr, Ms etc.	#P
#FORENAME	e.g. William	#P
#SURNAME		#P
#FAM	familiar name e.g. Will	#P
#MEMNO	membership number	#P
#EMAIL		#P
#TELEPHONE		#P
#TELEPHONE4	last 4 digits	#P
#MOBILE		#P
#MOBILE4	last 4 digits	#P
#EMERGENCY	emergency contact	#P
#AFFILIATION	home u3a	#P
#RENEW	renewal date.	#P
#LASTRENEW	last renewal date	#P
#FEE	renewal fee	#P
#LASTFEE	last renewal fee	#P
#MEMCLASS	membership class	#P
#GIFTAID	gift aid date	#P
#GROUPS	the member belongs to	#P
#ADDRESSH	address in 1 line	
#ADDRESSV	address over several lines	
#POSTCODE		
#POSTCODE3	last 3 characters	
#TODAY	today's date	
#U3ANAME	Beacon site name	

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

Links for on-line applications, renewals, calendar and groups are provided under 'Link List' in the tool

The email window is self explanatory and pretty much like most email apps. If you wanted to send a document to your members click "Chose Files' and navigate to the file on your computer.

The right hand column. By clicking the # you can insert members detail into the email.

For example, if you wanted to personalise the email to the individual member by adding their familiar name you would write

Hi #FAM so when they get the email they will see Hi Mick (or whatever their familiar name is).

Most of the list in the right hand column has a description.

#U3ANAME = Verwood u3a.

Tip: make sure you complete the email before your session timeout else you'll lose your email. Better to logout and log back in to start your session time again.

Tip: If you select the 'receive a copy tick box' you may get a copy of however many emails sent. If you send to 30 members you could receive a copy of each.