

This document should be used in conjunction with the U3A Beacon Management System User Guide which will provide additional detail on using the functionality described in this document. See section **4.10** for more information.

### **Roles, Privileges and Functions.**

This document describes the functionality to send E-mails to one or a number of Members. Some Roles will have privileges restricted to perform certain functions. Therefore, the privileges of any particular user of Beacon to use all or some of these functions will be determined by their role, which may restrict the functions that are available to a particular user.

### **Purpose:**

The purpose of this process is to describe how to use the email functionality in Beacon.

#### **1. Navigating to the E-mail function from the Members List.**

E-Mails may be sent from many places within Beacon. The Members List provides the ability to send emails to the whole membership or any part of it.

To access the email function from the Members List, select the member to whom an email will be sent by clicking on the box in the 'Select' column. (If a member shows an icon of a letter with a red line through it, then that member does not have an email address.)

At the bottom of the Members List the action box is set to '**Send E-mail**'. Click on the adjacent box '**Do with selected**'.

This will open the E-mail screen.

#### **2. Sending an E-mail**

The '**From**' address is taken from your member record.

The list of addressees is displayed under '**To**'.

Tick '**Tick to receive a copy**' if you wish to receive a copy.

If you wish to send one or more '**Attachments**', click on the '**Browse**' button next to 'Attachments' and select each file in turn.

Enter your '**Subject**' and then the text of the message in the box below.

#### **3. Tokens**

The message can be personalised by using '**Tokens**' which are listed on the right hand side of the email form. They are prefixed with the '#' symbol. When the message is sent these tokens will be replaced with the corresponding information for the member to whom the message is being sent.

#### **4. Standard Messages.**

If you send similar messages regularly, for example, reminders, they can be saved as 'Standard Messages' and recalled for use again at a later date.

To create a Standard Message enter the '**Subject**' and the '**Message**', including tokens, and click on '**Save as Standard Message**'.

You will be asked to give a message name. Note that only the message will be saved, not the recipients or attachments.

If you use a Standard Message you can amend or add to it and the revised text will be sent.

If a Standard Message has been selected, then there is an option to '**Delete Standard Message**'

#### **5. Website links**

To insert a website link into your message, position the cursor at the location in the message box where the link is to be inserted.

Click on the link icon which is two chain links in the tools box just above the message box.

You will now be asked to enter the full URL, including the http or https prefix, and the text to display.

Note the comments on the use of website links at the bottom of the E-mail screen.

Click '**Send**' to send the E-mail.

A confirmation message will be shown on the screen '**Send E-mail**' '**E-mail sent successfully**'

#### **6. More Information on Managing E-Mail through Beacon**

Please refer to the Beacon User Guide for more information on:

- Website Links, including editing URL's and using Link Lists for Membership applications and renewals on-line.
- Operational information on how E-mails are sent through Beacon
- Monitoring delivery of emails
- Spam reports.

**End**

Date 24/04/2017

Sending Email  
Status: Issued