

Group Coordinators – use of Beacon: basic notes

1. Please use Beacon as it ensures —
 - a. You can see which members have renewed or resigned
 - b. Data protection rules are upheld
2. Use the correct security credentials to log in as Group Coordinator. These are different from your security credentials as a member, and give you different access rights. Your device may autofill the wrong credentials, so check if you are having problems logging in.
 - a. Your Group Coordinator credentials will be supplied by Isabel, the Beacon Administrator, when your group is set up, and are likely to be your initials and a password she gives you, which you are asked to change. These credentials enable you to access the Group functions.
 - b. Your member credentials are your email address and the password you have created as a member. You use these to renew your membership.
3. Log in using the link on our public website, members tab, scroll down to Group coordinators/leaders. Or use this address: <https://u3abeacon.org.uk/password.php>. Keep this address in your Favourites, or pin it to your tab bar, so it is easy to find.
4. Once logged in, click on Groups, scroll down the list to your group and click on that. Your group will open, with four headings: Details, Schedule, Members, Ledger. For Details and Schedule, and adding members see below. To send emails to members proceed as follows:
5. Sending emails: Click on Members tab, then
 - a. on the Members page click on Select and choose recipients from the drop down menu (eg email only), or alternatively tick the box of the members you wish to include in the email. Scroll to the bottom and select 'Send email' then 'Do with selected'.
 - b. In the Send email page first select the correct 'From' email address, then type your email including the subject. You can personalise the email by clicking on the tokens at the side of the page, eg clicking on #FORENAME after typing 'Dear' will automatically fill in the appropriate name of the recipient.
 - c. Click in the 'Tick to receive copy' box if you are not among the chosen recipients.
 - d. Click on 'Send' at the bottom of the page.
 - e. To abort before sending, just click on 'Home' at the top of the page and everything will be deleted.
 - f. If you send a similar email out regularly, you can "Save as standard message" **before** you send the email. Create the basic email, then;
 - click on 'Save as standard message' (in blue at the bottom of the page)
 - give your message a name **always beginning with the name of your group**. This ensures you can find it easily and keeps all your standard messages together.
 - Next time you want to use the message click on the arrows next to 'Load standard message' and choose your message from the drop down list. Make any necessary amendments to dates etc.
6. To add members to your group, in your Group page click on Members tab:
 - At the bottom of the page under 'Add member by name' click on the arrow and select your member from the alphabetical list, then click on 'Add'.
7. It is assumed you have had help setting up the group in Beacon, but for details on how to complete or alter the Details and Schedule pages for your group, see [the Beacon User Guide, section 5: Groups](#). The User Guide has lots of helpful details, with excellent illustrations, on how to use Beacon. Ask the Groups Support Lead for any problems