

## Beacon instructions for Group convenors

- 1) Go to [u3abeacon.org.uk](http://u3abeacon.org.uk)
- 2) There's a drop down menu for the name of the u3a – select Wilmslow. Then enter your user name and password. When you first use Beacon, contact me and I will issue a user name and temporary password. On your first log in you will be prompted to choose your own password. If you forget either your user name or password, get back to me and I will refresh your memory!
- 3) On the home screen now you will see a list of places within Beacon where you can go. You may usually want to start with members – click on it and you will see a list of members. You can select individuals by clicking the box by their name or down at the bottom click select and you are offered some choices – usually you will click all with email.
- 4) You see a box labelled 'send email'. Now, if you want to send an email to the people you have selected, click 'Do with selected'.
- 5) An email window now appears. Complete it in the usual way. Please complete the 'subject' line, choose your own correct email address to send from if you have several. When your email is complete, click 'Send'.
- 6) You may want to add a person to your group. Select them as above, then click the down arrow on the 'Send email' box and you will see several choices. Click 'Add to group'
- 7) Now a new box appears labelled 'select group'. Click on the down arrow and a sub menu appears listing all the groups. Choose yours, and now click 'Do with selected'.
- 8) Now go back to the home page and click 'Groups' under 'Groups'. A list appears – choose yours.
- 9) Now a window opens with your group details. In the heading, you will see 'Members'. Click on it and you will see a list of members, including the one(s) you have just added. You can select all or individuals as from the main members list at 3) above.
- 10) In the window with details you will see various information about your group. You can edit it if you wish. When finished, click 'Save record'
- 11) You can do the same things with just your list of members as you could at 4) above. One of the useful things on the drop down menu (starting with send email) is 'Download Excel'. Click on 'Do with selected' and you will be prompted to select which information about the selected members you need – such as Name, email, phone and emergency contact.
- 12) Now click 'Download' and you will download an Excel file which you can use in any way you wish. Useful for your register.

Feel free to experiment!

My contact: [jrcookson@gmail.com](mailto:jrcookson@gmail.com). Please include u3a in your subject.

JRC 23/5/23