6.   Emails and Letters

6.1. Emails

Emails may be sent from many places within Beacon. When an email operation is selected, the **Send E-mail** page is displayed.

6.1.1. To send an email

- The **From** address is taken from your Member Record. Additionally, if you are assigned to an office (see 9.3), the office email address will also be shown and it will be the default. You should select the address that you want to use.

- The list of addressees is displayed under **To**. This is for information only, they cannot be changed here.

- Tick **Tick to receive copy** to receive a copy of the message.

- Enter a **Subject** for your message and then the message below.

- You may customise your message by inserting into the subject or message text any of the # tokens shown on the right. When the message is sent, these tokens will be replaced by the corresponding information for the member to whom the message is being sent. If the #FAM token is selected for a member who does not have a Familiar Name recorded their #FORENAME is used.

- If you wish to send one or more attachments with the message, press the button next to **Attachments** (the format will vary between browsers) and select each file in turn. The files will be listed under the button. To remove any file, click on the small **x** before the filename.

- To include a website link in your message, put the cursor at the position where the link is to be and press the **Link** button in the editor: In the dialog that appears, enter the full URL (including the http or https prefix) and the Text to Display.

- To avoid your email being suspected of being spam because of the way our mail agent encodes URLs, the text to display should be a meaningful description of the webpage you are linking to rather than a copy of the URL.

- By selecting from the Link List within the Link dialog, you can insert directly URLs for membership applications and renewals online. However, you will need to draft your own text to display.

- To edit a link, click on the link and then press the **Link** button.

After you have finished composing the email press **Send** to send the message.

Notes:
- All messages are sent to recipients individually. Therefore, no recipient can see who else the message is sent to.

- You can vary the line spacing in the message by using hard or soft returns:
A Hard Return (using Enter) gives a full line space before the next line of text.
A Soft Return (using Shift+Enter) will put the following words on a separate line immediately below the preceding text.

- When using Apple computers and some tablets, the Browse button is replaced by a text box containing a message such as "click in box" or "choose files".

- There is no practical limit to the number of attachments, 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.
- It is recommended that attached files don't have long names or names that contain special characters such as brackets because these can sometimes cause delivery problems.
- If the email browser 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 the Beacon email page (or put the text into an attachment).
- Sometimes when you send an email you will be presented with a CAPTCHA screen. This "**C**ompletely **A**utomated **P**ublic **T**uring test to tell **C**omputers and **H**umans **A**part" will ask you to tick a box to demonstrate that you are not a robot.

For additional recommendations about sending emails, refer to Appendix A.

6.1.2. Standard messages

If you send similar messages regularly they can be saved as standard message templates and recalled for use again later. In that way you do not have to compose them each time.

To create a standard message, compose the message and click on **Save as standard message**. You will be asked to give the message a name. Note that only the subject and message are saved, not the recipients or attachments.

To re-use a standard message, select the message by name from the **Load standard message** drop-down list. You may edit it, if necessary, before sending.

To remove a standard message, select it as above and then click **Delete standard message**.

6.1.3. Email delivery

Beacon uses a commercial email agent (SendGrid) to despatch messages and to provide details about progress. We have our own dedicated IP address so that our messages are not rejected because of misuse of the system by another party. However, all U3As using Beacon share this dedicated IP address, and a transgression by a user of one U3A could still affect everyone else.

We therefore require all U3As to ensure that the system is used responsibly and in particular to ensure that messages that could be construed as spam are not sent. **You MUST follow the guidelines shown in** Appendix A.

All messages sent by Beacon have a 'From' address of noreply@u3abeacon.org.uk and recipients will see them as having come from (for example) 'John Smith via MyTown U3A'. This is to circumvent problems with certain mail hosts, in particular AOL and Yahoo, whereby messages from users with email addresses of these hosts may be rejected when coming from third-parties such as our mail agent.

Ordinarily, recipients can still reply directly to the sender (such as by pressing a 'Reply' button) as the 'Reply-To' header in the email is set to the user's own address. However, a few mail programs may not do this.

The progress of messages can be monitored through **Email Delivery**. In addition, where messages are bounced, dropped or are the subject of spam reports, an email will be

> sent by Beacon to the sender and to the Site Administrator naming the offending email address and describing why the address has been blacklisted.
>
> **All message failure reports should be treated seriously**. Rejected email addresses should be verified, (most of them are simple spelling errors) and corrected or removed from Beacon as soon as possible if not proven to be valid.
>
> Rejected addresses are added by our mail agent to a blacklist and any further attempt to send to these addresses will be rejected (with a 'dropped' error). The Site Administrator may remove email addresses from the blacklist.

You can check upon the progress of emails sent, to see if they have been delivered. If the recipient views images in their emails, you can also see if and when the message was accessed by the recipient. You can see whether or not the recipient clicked on a website link within the message, such as to make a membership renewal.

Particularly when sending a message to many members, a check should be made that they have not bounced due to invalid email addresses.

To check **Email delivery**, select this option from the Home Page.

A list is displayed of the last 50 messages sent by you (or by all users in the case of a Site Administrator). Earlier messages can be seen by clicking in the block of blue numbers or the list can be filtered between specific dates and times. Site Administrators may also search for emails sent to a specific email address.

Click to check the status of an individual message. A list of all recipients will be displayed showing the message status for each of them. Message failures are shown in red.

Statuses are:

Despatched by Beacon
The message has been sent to our email agent.

Processed
The message has been received by our email agent but not yet forwarded on.

Deferred
Our email agent is unable to establish communication with the recipient's email provider in order to forward the message on. The sending of Deferred messages is automatically retried at intervals over a day or more until repeated failures cause the message to be rejected.

Dropped
The message has been rejected by our email agent. This is either because the email address was in an invalid format, or because a previous email to this address was Bounced or Reported as Spam. Such an email address is blocked by our email agent (we say it has been blacklisted), and can only be unblocked by the Site Administrator or the Beacon Support Team.

Delivered
The message has been accepted by the recipient's email provider, though it may have gone to the recipient's spam folder rather than their inbox. Note that some email providers may silently bin the email without delivering it to a spam folder if the software guesses it is probably spam. Hotmail is particularly fierce in this regard.

Bounced
Our email agent distinguishes two sorts of delivery error. One it calls 'Bounced' and the other 'Blocked'.

Bounced means that the message has been rejected by the recipient's email provider, usually because the address is incorrect, disabled or no longer valid. The error message returned is displayed in red and should be examined. Invalid email addresses should be removed from Beacon.

If a blacklisted email address is verified as being genuine, it can be removed from the blacklist by the Site Administrator using the email unblocker (*see 6.1.4*).

Blocked

Also called "Soft Bounce" by many people. For example MailChimp says:

Soft bounces typically indicate a temporary delivery issue to an address and are handled differently than hard bounces. While there are many reasons an email address may soft bounce, below are some common reasons this could happen:

- Mailbox is full (over quota).
- Recipient email server is down or offline (an example is orange.net which is no longer an active mail system)
- Email message is too large.

Our email agent thinks that a 'Block' may be only temporary and does not add the recipient's address to the blacklist, so the email unblocker does not work these emails. Beacon doesn't email the sender and the Site Administrator about blocked emails but does flag them up in the email delivery log.

Opened

The message has been received by the recipient who has downloaded it onto his/her computer. Note that the method by which our mail agent detects this is by the automatic inclusion of a tiny image in the message. If the user has a setting where they don't view images in emails this **Opened** status will not be set, even though the recipient has read the text of the message. Therefore more recipients will have opened an email than is indicated by this status.

Clicked

A website link within the message has been clicked on by the recipient. The link clicked is indicated. In distinction to the 'opened' status the **Clicked** status should always be true if the user has clicked on the link in your message.

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. An isolated spam report is not a disaster but repeated spam reports will damage Beacon's reputation and could adversely affect all users.

If a blacklisted email address is verified as being genuine, it can be removed from the blacklist by the Site Administrator using the email unblocker (*see 6.1.4*).

6.1.4. Email unblocker

The email unblocker utility is accessible only to the **Site Administrator** (not to other users with the Administration role). It allows removal of the provided email address from SendGrid's bounce and spam lists. Please only use this if you know the provided email address is valid and has requested to be unblocked.

Enter the blocked email address and a confirmation message will be displayed to confirm that the email address has been unblocked.

6.2. Letters

Letters are one page documents that are personalised with members' details (Name, Address, Membership number, etc.). A typical use is for personalised Membership Renewal forms for members to review their details before signing to indicate that they wish to renew.

Letters may be created from many places within Beacon. When a letter operation is selected, the **Send Letter** page is displayed.

6.2.1.To compose a letter

- The list of addressees is displayed under **To**. This is for information only, they cannot be changed here.

- The # tokens shown on the right side can be inserted to personalise the letter for each recipient. If the #FAM token is selected for a member who does not have a Familiar Name recorded their #FORENAME is used instead.

- Website links can be inserted as described in the email section (see 6.1).

- After you have finished composing the letter press **Download** to generate the letters in a pdf file.

Notes:

- *You can vary the line spacing in the letter by using hard or soft returns:*
  A Hard Return (using Enter) gives a full line space before the next line of text.
  A Soft Return (using Shift+Enter) will put the following words on a separate line immediately below the preceding text.

- *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.*

6.2.2. Standard letters

If you create similar letters regularly they can be saved as standard letter templates and recalled for use again later. In that way you do not have to compose them each time.

To create a standard letter, enter the message (including tokens if required) and click on **Save as standard letter**. You will be asked to give the letter a name. Note that only the message is saved, not the recipients.

To re-use a standard letter, select the letter by name from the **Load standard letter** drop-down list. You may edit it, if necessary, before sending.

To remove a standard letter, select it as above and then click **Delete standard letter**.

Appendix A: Recommendations for using email

Sometimes Beacon emails are undeliverable. There are five ways that this may be shown:

- Bounced   Bounced as undeliverable
- SpamReport   Reported by the recipient or their mail software as spam
- Blocked/expired: Not been able to be delivered by our mail agent
- Dropped: Dropped by our mail agent
- Delivered: Silently dropped by the recipient's mail server as likely to be spam

The first four are reported back to Beacon and shown in red on the email delivery reports page, the fifth is undetectable and will be reported as delivered. Only the first two cause our mail agent, SendGrid, to "blacklist" (Beacon terminology) the recipient email address, and whilst blacklisted further emails to that address will be dropped by SendGrid.

In all four detectable undeliverable cases, Beacon will send an email message back to the sender and to the Site Administrator, explaining the type of error, and including the reporting system error code. The email will typically say:

The message to *[member name] [email address]* from U3A Beacon *[site name]* on date *"yyyy-mm-dd"* at time *"hh:mm:ss"* with subject "*xxxxx*" has been dropped by our mail agent.

The error report is:
'Spam Reporting Address'

A dropped error often indicates that the address is blacklisted due to a bounce or spam report rejection of an earlier email to this address. Your Beacon Site Administrator will have been notified of such rejections and is responsible for dealing with them.

Sending Emails from Beacon
There are a numbers of ways in which both the senders and recipients of emails can reduce the likelihood of emails not being delivered:

1. Minimise the frequency of sending emails to similar large lists (over 50) of recipients. It is better to delay until you have more information to put into a single email.

2. Avoid sending emails that the majority of recipients won't bother to open. It encourages the system to assume that messages from the sender are spam.

3. If you are sending an email to a large number of people, say over 50, please accept that your email will be processed by spam filters in the same way as mass marketing emails. Therefore you should follow the following industry guidelines for such mail.

   i. Avoid or minimise sending attachments when sending an email to large lists of recipients. It is tempting to do so, as Beacon and SendGrid enable you to do so, but it is recommended instead to put the files on to your website and to provide a weblink to let the user download the file if they want. You can alternatively use services such as Dropbox

   ii. When putting a link (URL) into an email, do NOT use the URL itself as the clickable visible text. Instead use some descriptive English text. Note that this is the opposite of Beacon's previous guidance and is due to the way SendGrid handles links, and you may need to change some of your standard email messages

iii. Maximum organisation visibility helps as well. Including your physical mailing address and phone number in your email footers helps mail providers recognize you as a legitimate organisation and sender of email. This also helps your recipients know that this message is indeed from you!

iv. Provide an explicit way for the recipient to unsubscribe from getting emails from you, even though you know they have said they want such emails. For example at the bottom of your email: *"To unsubscribe from these mails email Memsec@yourU3A with subject unsubscribe from emails."*

4. SendGrid and Beacon often cannot tell that an email has been opened. SendGrid, like other mailing agents, 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.

Receiving Emails from Beacon

Emails arriving in Spam or Junk folders can usually be dealt with by right clicking and picking from the available options like **Not spam** or **Never block sender**. This will add the sender's email address to a Safe Senders List and stop future emails from that sender going into Spam or Junk folders. Members should also check that the sender's email address is not on a Banned senders list.

The method of changing Junk/Spam settings varies depending on who the email provider is and whether it is accessed via a website or via an email application such as Microsoft Outlook. Details for some of the more commonly used email providers and applications are shown below.

Apple products

There are no junk mail settings on iPads, iPhones and Macs apps. Users need to log in via their email provider's website and adjust the settings there.

Outlook.com (including Hotmail)

Log in to Outlook.com and have a look in your **Junk mail folder**. If there are any U3A emails in there right-click the email and choose **Not junk**. The email will be moved to your inbox.

Click on the gear wheel icon (top right) to open the **Settings** menu and click **Options**. Under Junk email, click **Blocked senders**. If there are any U3A addresses in the list, select them and then click the dustbin icon to remove them from the Blocked Senders list.

Click **Safe Senders** (under Junk email). Type "noreply@u3abeacon.org.uk" in the box and click on the plus sign to add that email address to the Safe Senders list.

Sky/Yahoo Email

If an email arrives in the Spam folder, click **More** (or right click) followed by **Not spam**. This will move the email to the Inbox.

To check what is on your Banned Addresses list, click the gear (cog) icon, followed by **Settings** and then **Banned addresses**.

Microsoft Outlook

If an email arrives in in the Junk folder, right click and select **Junk,** followed by **Not Junk**. This will move the email to the inbox and advise you that "Outlook will not block future emails from noreply@u3abeacon.org.uk".

Alternatively, you can click the Junk icon in the top menu or right click the email and select either **Never block sender** or **Never block sender's domain**.

To add the U3A email address to your safe senders list, click the **Junk** icon in the top menu, followed by **Junk email options**. Click the **Add** button on the Safe senders tab and enter noreply@u3abeacon.org.uk in the box.