

FuquaConnect Messaging Guide

This guide outlines the options you have for sending a message or newsletter to your club through FuquaConnect. We break down the key differences between the **Messaging** and **News** tool in FuquaConnect, then provide step-by-step instructions for using each tool. Last, we share best practices for using an external tool like Mailchimp for sharing your club newsletter.

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Messaging vs. News: Which should I use?

FuquaConnect has two options for sending a message to all members of your organization: the **Messaging** and **News** tools. This table breaks down the key differences in these tools so you can make the decision about which option serves your organization’s needs the best.

Question	Messaging Tool	News Tool
Who will the email message come from?	The email will come from the name of your organization in FuquaConnect.	The email will come from FuquaConnect with the title and summary of the News Post and a link the full article in FuquaConnect.
Can I customize who in my organization receives the message?	Yes. You can select specific positions within your Roster that you want to receive the message – e.g. Daytime 2020, Daytime 2021, your leadership cabinet, etc.	No. A news post can <i>only</i> be sent to ALL members of your organization in FuquaConnect. You <i>cannot</i> send your news post to a targeted group. You can customize visibility <i>within FuquaConnect</i> (meaning who is able to see that news post when they visit your page in FuquaConnect), but those options are only: <ul style="list-style-type: none"> • Public (anyone in the world) • Institution (all of the Fuqua) • Organization (your members) • Private (only administrators in your organization)
Can I format text or insert images into the message?	Yes. Because you will draft the content of your message in Outlook, you have the same ability to insert images, add text colors, hyperlink, or add other rich content as you would sending a normal email.	Yes and no. You cannot insert images into the body of a news post, but you can insert a header image at the top of your news post. You can bold, italicize or underline text, but your text customization is limited beyond that. You can also hyperlink to files or URLs.
Do I have the ability to save and edit my message and send later?	Yes. Because you draft the content of your message in Outlook, you can save it in your drafts as you work on it. However, you should wait to generate the relay address until you are ready to send your message (see detailed instructions in the Messaging section).	No. You MUST have the option to “Notify all members of this organization about this news article” checked when you click Create Article for the first time in order for the system to trigger an email (see detailed instructions in the News Post section).
Will a copy of my message be saved in FuquaConnect for later reference?	No. You will be able to see a record that your message was sent, but not the content of the message. The content of the message will be in your Sent folder on Outlook. We recommend saving your message as a PDF and uploading it to your club’s Documents section on FuquaConnect.	Yes, there will be a copy of your News post in your club’s News section on FuquaConnect.

Step-by-Step: Using the Messaging tool

- 1) Open a new email in Outlook (or any other email platform). Create a subject line for your message or newsletter and draft the content as you would any other email. **Be sure to remove your email signature if you don't want that incorporated at the end of your message.**
- 2) When you are ready to send the message, go to FuquaConnect and click the icon to **Switch Views** to the left of your profile circle in the top right menu. Click **Manage** from the drop down menu and click the name of your organization under **My Memberships**.
- 3) Expand the menu to access your organization's tools and click **Roster** from the drop down menu.
- 4) Click the first option in the top menu, **Messaging**.
- 5) From the **Relays** tab, click **Create Relay**.
- 6) Under **1) Select Recipients**, click **Edit** under **Send to members holding these Positions**. A pop up will appear with all available Positions in your organization. Check the boxes of all Positions you want to receive the message. To send to ALL members of your organization, click the **Member** position. Click **Close** at the bottom of the pop up once all Positions you want to receive the message are selected.
- 7) Copy and paste the subject line of the email message you drafted previously under **2) Enter Title. DO NOT skip this step, otherwise your message will be sent with a blank subject line.**
- 8) Click **Generate** under **3) Generate Relay Address**.
- 9) FuquaConnect has now generated a temporary email address that you can use to send your message. **Copy and paste the temporary relay address into the "To" field of the email you previously drafted.** The temporary relay address will start with "FuquaConnect" and end with "@relay.engage.campuslabs.com".
- 10) Hit **Send** on your email in Outlook. Because all emails from external systems must go through spam checks on Duke's servers, **your message may not be delivered immediately and may be delayed for up to 1 to 2 hours.** This makes the Messaging feature a good option for non-urgent messages like newsletters or general updates, but not for urgent messages about event cancellations or room changes.
- 11) You can return to the Messaging tool to check the status of any previous message. Click the icon for **Message Details** (under **Action** in the table) to view additional details about that message.

Step-by-Step: Using the News tool

- 1) Navigate to your organization's **Action Center** by clicking the icon to **Switch Views** to the left of your profile circle in the top right menu. Click **Manage** from the drop down menu and click the name of your organization under **My Memberships**.
- 2) Expand the menu to access your organization's tools and click **News** from the drop down menu.
- 3) All existing News Articles in your organization will be listed here. Click **Create Article** above any existing News Articles to create a new post.
- 4) Now you can customize the content of your News post. Enter what you want to appear in the subject line of your message in **Title**. The content in **Article Summary** will display in the email message your members receive, so think carefully about what you would like included there. The **Body** is the main meat of the News post. You can upload an **image** that will display as the header for your News post in FuquaConnect. Include a **caption** so that users who use screenreaders can comprehend the image. Last, set the **Visibility** for the article, e.g. who should be able to see your News post within the Fuqua community.

Note on Visibility: even if you set the Visibility to **Public** or **Institution**, the email will only be sent to members of your organization in FuquaConnect. However, public users or any member of the Fuqua community will be able to see the content of that News post when they visit your organization's page in FuquaConnect.

- 5) When you are ready to send, click the box at the bottom of the page to **Notify all members of this organization about this news article** and then click **Create Article**. **THE BOX TO NOTIFY MEMBERS MUST BE CHECKED BEFORE YOU CLICK CREATE ARTICLE FOR THE FIRST TIME TO TRIGGER AN EMAIL SEND**. If you click Create Article and do NOT have this box checked, you cannot go back and send it later.

Using an external tool for your newsletter

Many clubs use an external tool to send their newsletters. For example, the MBAA uses MailChimp to send **Fuqua This Week**. Using these tools allows for tracking engagement information like email open and click through rates, data that is not available through either tool provided by FuquaConnect.

Here are some best practices to consider if your organization opts to use an external tool to send your newsletter:

- 1) Fuqua Marketing/OSL does not specifically recommend any one newsletter or mailing tool. **MailChimp** is most commonly used because it offers a free plan that is robust enough to accommodate most club email needs.
- 2) As with any other tool or platform your organization uses, **don't forget to pass off administrative access to your new leadership during the transition in Spring 2!** Because you are opting to use an external tool instead of the tools supported by Fuqua, it is also your responsibility to provide adequate training on the tool to your new leadership.
- 3) Using an external tool will require that you are actively referencing your roster and updating your subscriber list within the tool. We recommend exporting a copy of your organization's FuquaConnect roster *at least bi-weekly (every other week)* and adding any new members to your subscriber list at that time. You may want to pull your roster more frequently during peak periods of the academic year, especially Fall 1.

To export your roster, follow the steps outlined in the [Messaging section of this document](#) to navigate to your Roster. Click **Export Roster** in the top menu on the far right. This will run a report and you will receive an email when the excel file is ready to download. You can also click your profile icon from the very top menu and click **Downloads** to view all the reports you've downloaded. Each member of your organization will have an entry in the roster for *each position they hold* (e.g. "Member" AND "Daytime 2021"), so you will need to filter out duplicates to get a scrubbed version of your roster.

- 4) Because FuquaConnect is your "official" online presence at Fuqua, it's a good idea to have your club's newsletters stored or saved there for the reference of new leadership or for new members of your organization to "catch up" on previous news. We recommend creating a folder in the **Documents** section of your FuquaConnect page and uploading PDF versions of all Newsletters. More information on using the Documents tool is available on [the CampusLabs \(developer of FuquaConnect\) support site](#).