

Content Templates across Navigate360



Help Center Manager

1 month ago Updated

What: Content Templates allow users to create a library of reusable templates that can be saved or shared for common frequent communications.

Modules: Enrollment Success, Advancement Success, Student Success

Where: Content Templates are available from the user menu in Navigate360 staff platform.

Who: Content Templates give **staff** and **faculty** reusable message templates for communications.

Conditions: To use Content Templates, staff and faculty must have the *Use Templates* permission to have access to public templates. To create and use their own templates, users must have the *Create, Edit, Delete Own Templates* permission.

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Feature Overview

Content Templates give users the ability to create a library of reusable templates that can be saved or shared. This helps users who have frequent types of messages, such as appointment instructions, to send communications to recipients more quickly without any glitches or errors caused by copying and pasting a template from another source.

Access Content Templates by going to **User Menu >> Content Templates**.

The screenshot shows the Navigate360 Administration interface. The top navigation bar includes the logo, 'STUDENT SUCCESS', a search bar, and a 'Groups' dropdown set to 'Whitehurst Unive...'. A user profile icon in the top right corner is highlighted with an orange box, and its dropdown menu is open, showing options: 'Admin Settings', 'Update Password', 'User Settings', 'Content Templates' (highlighted with an orange box), and 'Logout'. The main content area is titled 'Administration' and is divided into three columns: 'Site Configurations' (with links like Global Configuration, Group Configuration & Access, Care Units, Absence Email Templates, Alert Reasons, Case Outcomes, Custom Links, Important Information, and Announcements), 'User Management' (with links like Role Configuration & Access, Create a New User, Edit a User, Edit School-Wide Pronouns, Mass Edit of Students, Mass Edit of Users, and Mass Tagging by ID), and 'Imports and Exports' (with links like Manage Data Export Users, Change My User's API Key, View My User's API Key, Configure SFTP, Endpoint Configuration, Data Import, New Data Import, LMS Data Integration (Canvas Only), and Photo Import Logs).

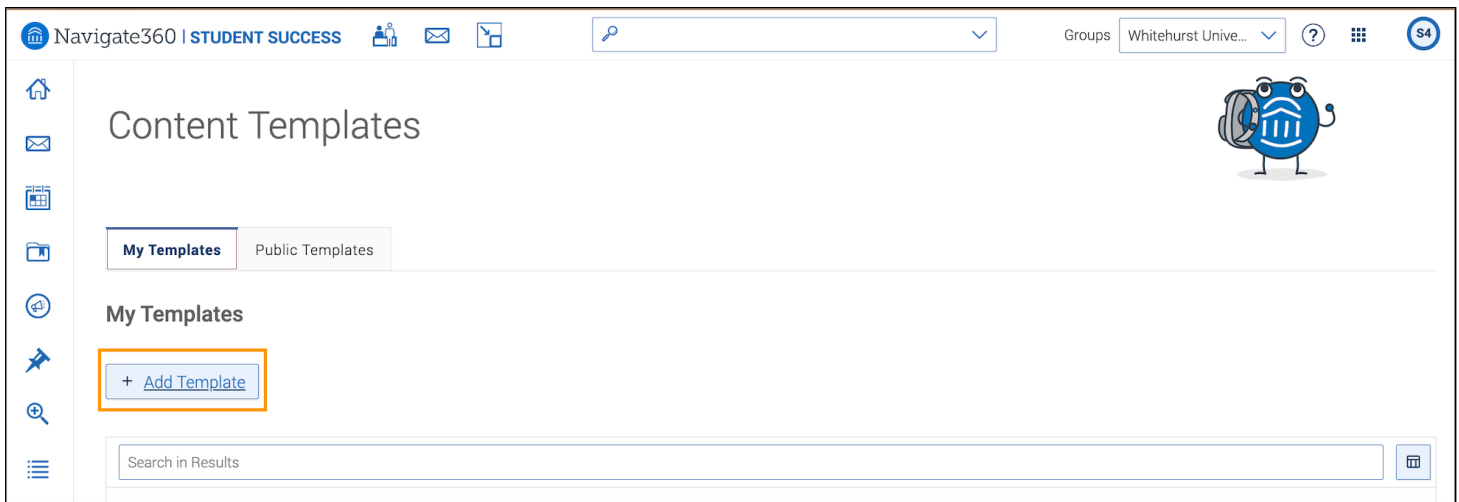
The Content Template page opens.

The screenshot shows the 'Content Templates' page. At the top right is a cartoon character icon. Below the title 'Content Templates' are two tabs: 'My Templates' (selected) and 'Public Templates'. Under the 'My Templates' tab, there is a '+ Add Template' button. Below this is a search bar labeled 'Search in Results'. The main content area displays 'No Content Templates' with the message 'User has not added any message content templates'. At the bottom right, there is a pagination control showing '1 - 0 of 0' and a search box containing '100'.

The page has two tabs - **My Templates**, which is for any template the user has created, and **Public Templates** which is for any templates that have been shared for all Navigate360 users. The tables on each page are searchable so users can find the template they want.

Creating a Template

Select the **Add Template** button on the My Templates tab to create a new template.



Navigate360 | STUDENT SUCCESS

Content Templates

My Templates Public Templates

My Templates

+ Add Template

Search in Results

The **Compose Template** page opens.

Add Template

Enter your subject and content below

Compose Template

General Settings

Template Name *

General Outreach Message

☒ Template is Active

Template Description

☒ Make template public

Template Content

Template Type

☒ Email ☐ Text ☐ Landing Page ☐ Print

Branding Template * ⓘ

System Branding Templat X v

Update

Header



WOODLEY
UNIVERSITY

Subject

A quick update from Woodley University

Message

Paragraph v A v A v A[≡] v A↑ v B I | :

Hello [First Name],

We are reaching out to share an update that may be relevant to you.
This message is part of our ongoing effort to provide timely and
useful information based on your connection with [Institution Name].

[Insert main message content here. Keep this section focused on one

[insert main message content here. keep this section focused on one purpose, such as an update, reminder, or next step.]

If you have questions or would like additional information, you can reply to this message or use the contact details below.

Thank you,
[Sender Name]
[Title or Team Name]
[Institution Name]
[Contact Information]

✓ Enhance with AI ⓘ

Attachments

Drag & Drop your files or [Browse](#)

Footer

Save Template

Cancel

The following fields are available.

Template Name (Required)

Name of the template. Make this memorable and brief, especially if it is going to be public.

Template Is Active

Check this box to allow for users to select the template when composing email or text messages in the platform.

Template Description

A brief description of the template that can be used to find templates when searching results.

Make Template Public

Check this box to allow any Navigate360 user with the *Use Templates* permission to apply the content template to their email or text messages. If it is not checked, only the user who created the template can use it when composing email or text messages.

Template Type

Templates can be Email, Text, Landing Page, or Print. Text message templates are limited to 300 characters in the GSM-7 character set.

Branding Template

Select a header and footer for the content template from this menu.

Subject (email messages only)

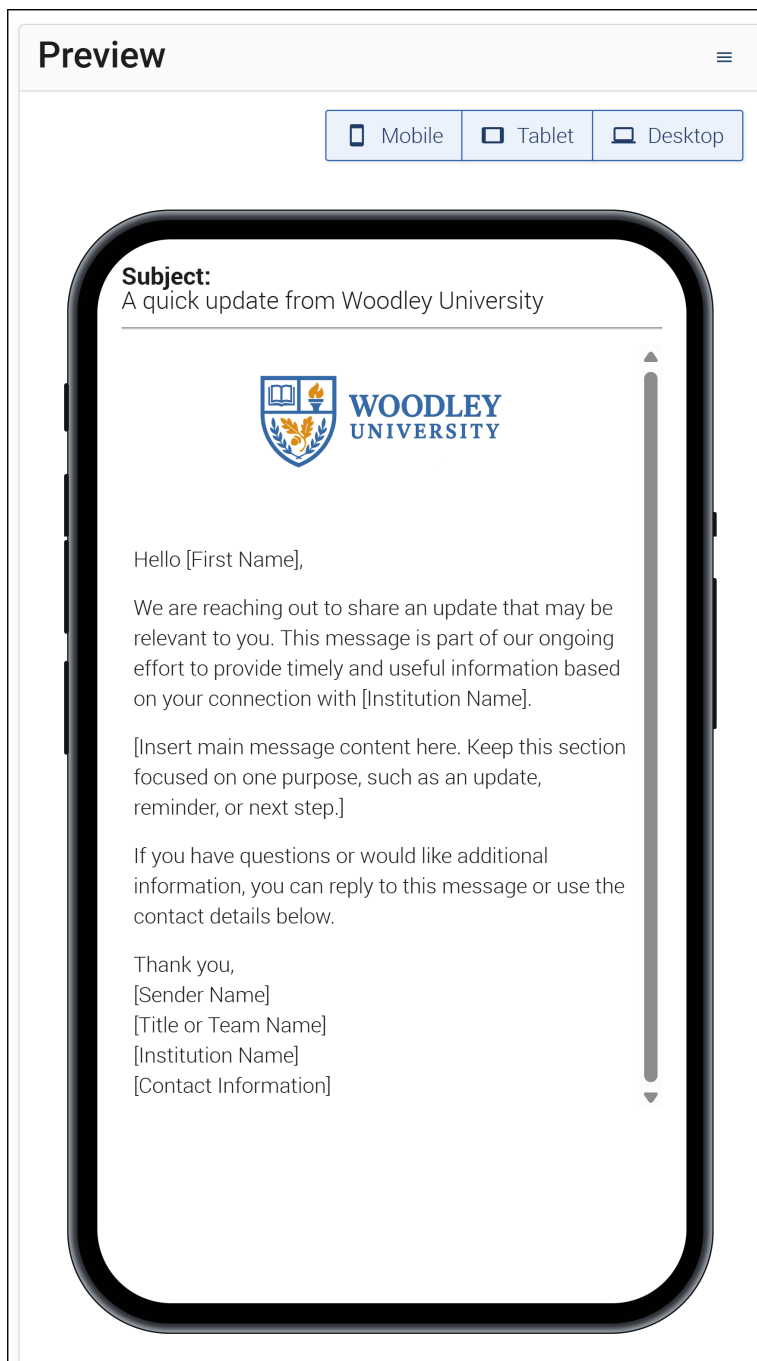
The subject line for the email message.

Message/Description (for Event Landing Pages)

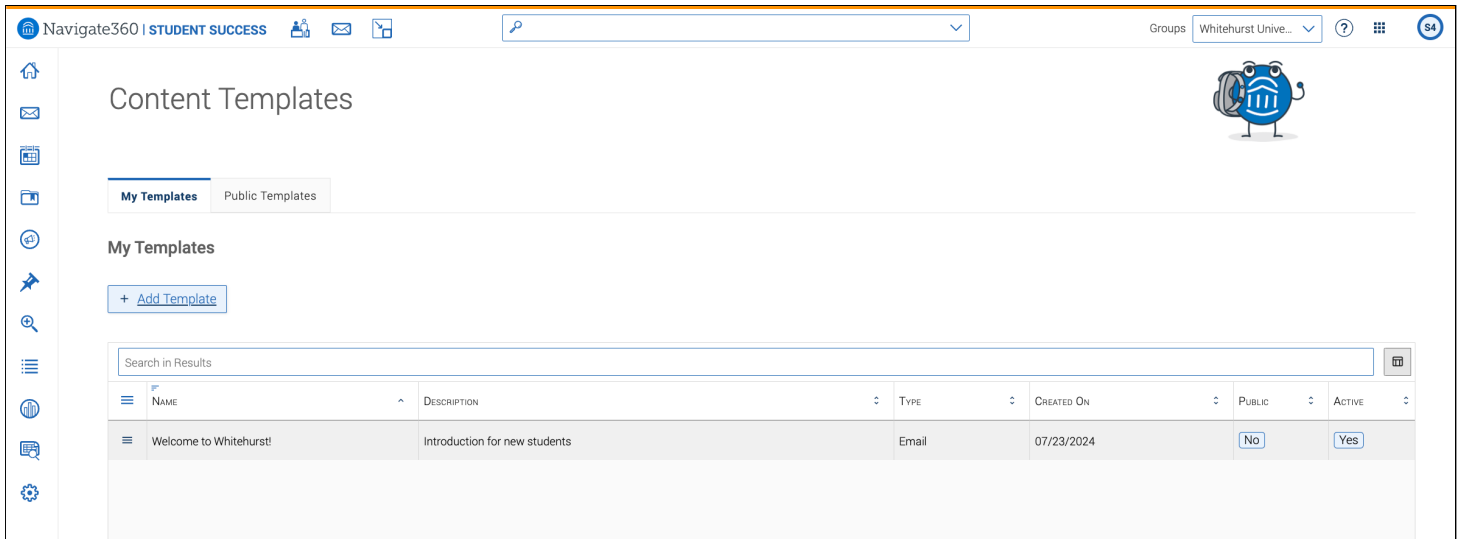
The template message or description. For emails and landing pages, rich text formatting is available, including links, images, lists, and tables. Text message templates are limited to 300 plain text characters. Email messages can also include attachments. If your institution has the Message Content Creator features, these are available beneath the message field for emails and texts.

For Email and Print templates, you can select and insert merge tags directly into the template content. Refer to [Merge Tags in Content Templates](#) below for details.

On the right side of the page, the content preview displays the message as it will appear to recipients. You can view the preview in a Mobile Device, Tablet, or Desktop frame. For templates intended for print, you can generate a PDF to download and review.



After configuring the template, click **Save Template**. Completed content templates display in the table on My Templates.



Content Templates

My Templates Public Templates

My Templates

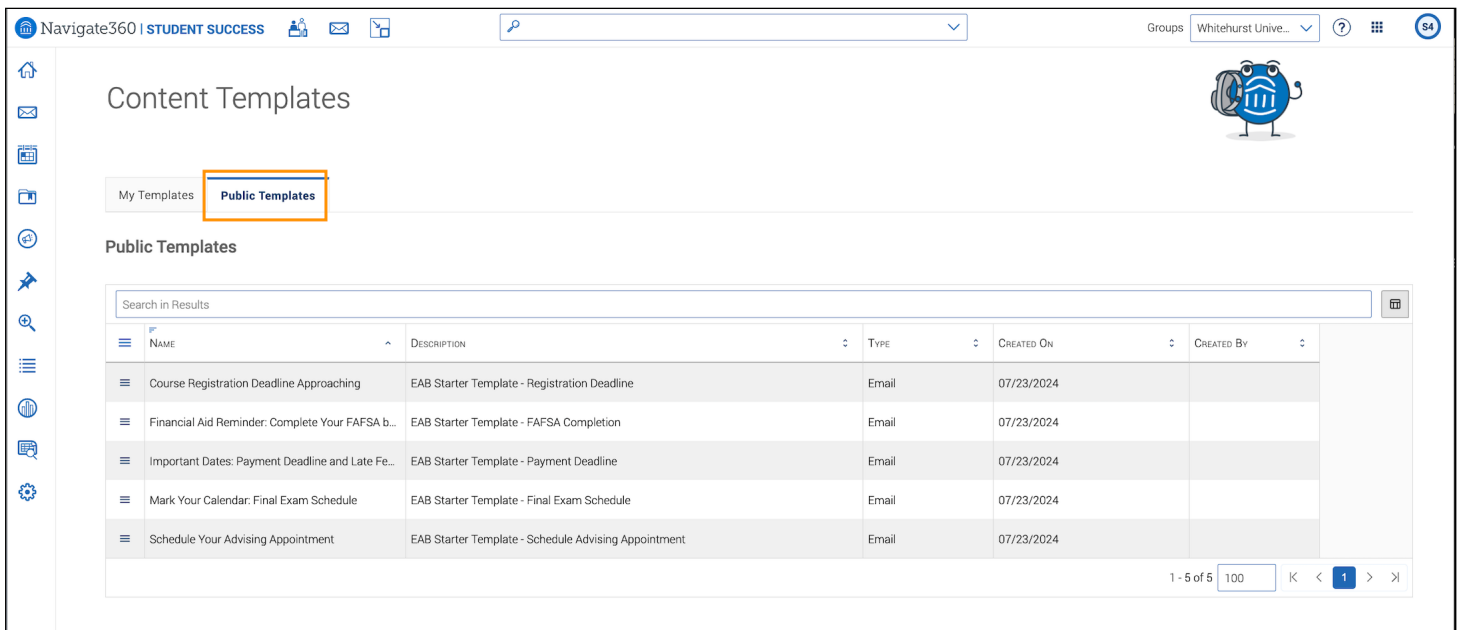
+ Add Template

Search in Results

NAME	DESCRIPTION	TYPE	CREATED ON	PUBLIC	ACTIVE
Welcome to Whitehurst!	Introduction for new students	Email	07/23/2024	No	Yes

Public Templates

Public templates allow users to share templates. For example, a tutoring office can use a public template so that all tutors can use the same intake form for students who need tutoring. Navigate360 also includes a few EAB starter templates for examples for your institution, though these can be deleted or edited by your app admin.



Content Templates

My Templates Public Templates

Public Templates

Search in Results

NAME	DESCRIPTION	TYPE	CREATED ON	CREATED BY
Course Registration Deadline Approaching	EAB Starter Template - Registration Deadline	Email	07/23/2024	
Financial Aid Reminder: Complete Your FAFSA b...	EAB Starter Template - FAFSA Completion	Email	07/23/2024	
Important Dates: Payment Deadline and Late Fe...	EAB Starter Template - Payment Deadline	Email	07/23/2024	
Mark Your Calendar: Final Exam Schedule	EAB Starter Template - Final Exam Schedule	Email	07/23/2024	
Schedule Your Advising Appointment	EAB Starter Template - Schedule Advising Appointment	Email	07/23/2024	

1 - 5 of 5 100 K 1 > >|

Each template has a row action menu for users with the *Edit and Delete Public Templates* permission that allows them to edit, copy, or delete existing public templates. Otherwise, users who can use public templates can preview the template from the table.

Using Content Templates in Navigate360

Once users have access to at least one content template, the **Apply a Template** option appears when users are composing an email or text message throughout the Navigate360 platform.

Send Message ×

☒ Email
 ☐ Text

To: Mike Gowen

^ **Apply a Template** ⓘ

Note: Loading a template will overwrite any content you have entered as well as use the header and footer configured within the template chosen.

Templates ⓘ

Select Template ^

Default Header & Footer

My Templates

Course Registration
Deadline Tomorrow

Public Templates

Course Registration
Deadline
Approaching

Update

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Merge Fields

✓ Enhance with AI ⓘ

Attachments

Drag & Drop your files or [Browse](#)

Send Message

Preview Message

Send Sample ⓘ

Cancel

Content templates can be applied in the following areas:

- Send message dialogs
- Welcome messages, success messages, and nudges for Campaigns
- Invitations and reminders to RSVP, RSVP Confirmations, and Event Reminders for Events
- Email settings for Alert Reasons

For Print Mail, a predesigned template applies standardized content and formatting to the document. This option is available only for **Print Nudges**. Before generating the print job, you can generate a PDF to preview the final output.



Add Template

Enter your subject and content below

Compose Template

General Settings

Template Name *

☒ Template is Active

Template Description

☒ Make template public

Template Content

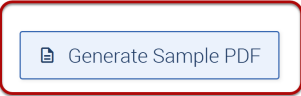
Template Type

☐ Email ☐ Text ☐ Landing Page ☒ Print

Branding Template * ⓘ

✕ ✓ Update

Preview



To preview this document, generate a sample PDF to download the print document.

For Landing Page templates, they are applied on the **Edit Registration Page** step.

Edit Registration Page

Set up your event registration page.

Event Description

Please include Event Information in Your Description ×

You may use the optional Event Information merge tag, or manually enter event information into the description, such as event name, date, time, location, and contact information into the body of your event description.

^ Apply a Template ⓘ

Note: Loading a template will overwrite any content you have entered as well as use the header and footer configured within the template chosen.

Templates ⓘ

Event Landing Page - Future × ▾

Update

[Browse and Preview Templates](#)

Description *

Paragraph



Registration Page Preview



Mobile



Tablet



Desktop

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This is a marketing event from EAB University, EAB University 2024.

Merge Tags in Content Templates

Administrators and staff can use merge tags in Email and Print content templates. When creating or editing a template, users can select and insert merge tags directly into the template content.

Update Template

Enter your subject and content below

Compose Template

General Settings

Template Name *

Course Registration Deadline Tomorrow



Template is Active

Template Description

Registration Deadline



Make template public

Template Content

Template Type



Email



Text



Landing Page



Print

Branding Template * ⓘ

System Branding Template Navigate360 Demo School 1



Update

Header



WOODLEY
UNIVERSITY

Subject

Course Registration Deadline Approaching

Message

Paragraph



We wanted to remind you that the deadline to register for courses for the upcoming semester is quickly approaching on [DATE]. Don't miss out on securing your preferred classes and building your schedule for a successful term. If you have any questions or need assistance with course selection, please don't hesitate to reach out to your academic advisor or the Registrar's Office.

Search merge fields

Students Report Fields

Student Name

First Name

Last Name

Email

Student ID

Alternate ID

Categories (Comma List Format)

Tags (Comma List Format)

Majors (Comma List Format)

Merge Fields

When a template containing merge tags is applied during campaign or event message composition, the merge tags are preserved and resolved at send time. After applying a template to a nudge, message, or invitation in a campaign or event, users can also insert merge tags directly when composing or editing that content, even if it did not start from a template.

Templates created using the HTML editor also support merge tags. When you select an HTML-based template, the message editor automatically switches to HTML mode and applies the template content, including merge tags, as-is.

Note. Merge tag support applies to Email and Print templates and nudges only. This feature is not available for Text (SMS) templates or nudges.

The merge tags available depend on the module you're working in. If a template contains a merge tag that isn't supported in the selected module, an error message lists the unsupported tags and blocks saving until the template content is corrected or a different template is selected. The unsupported tags are also highlighted in the message preview.