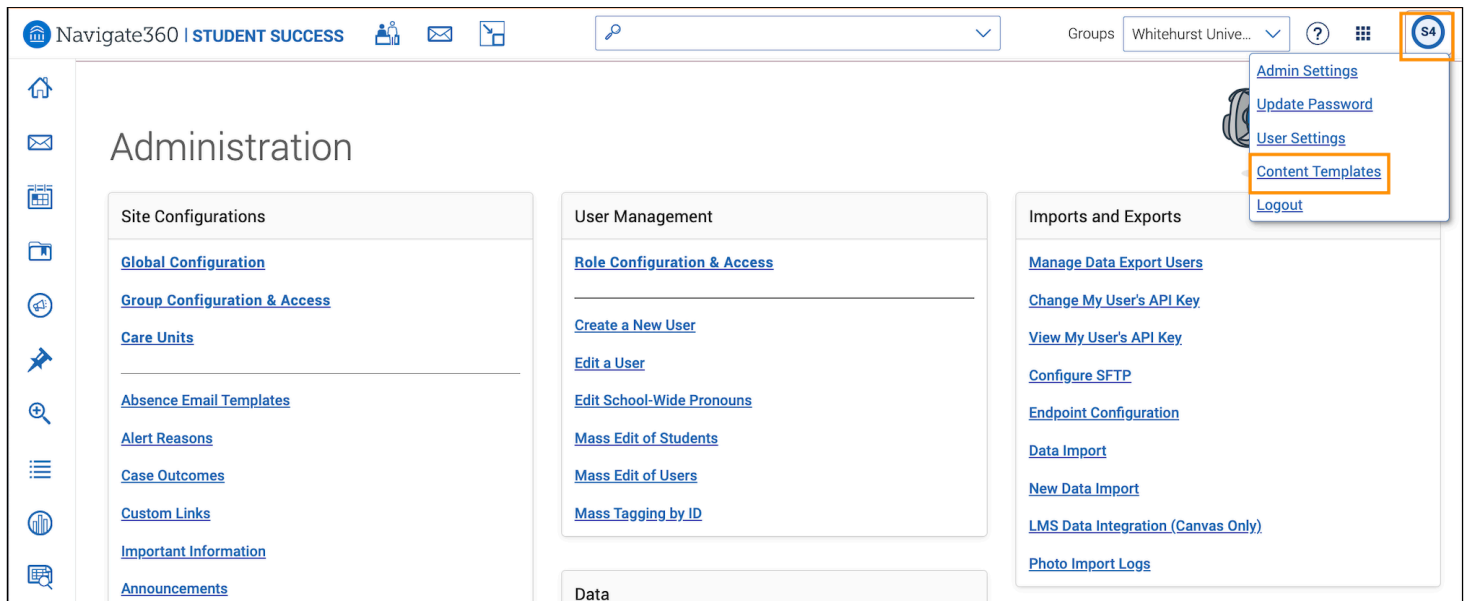


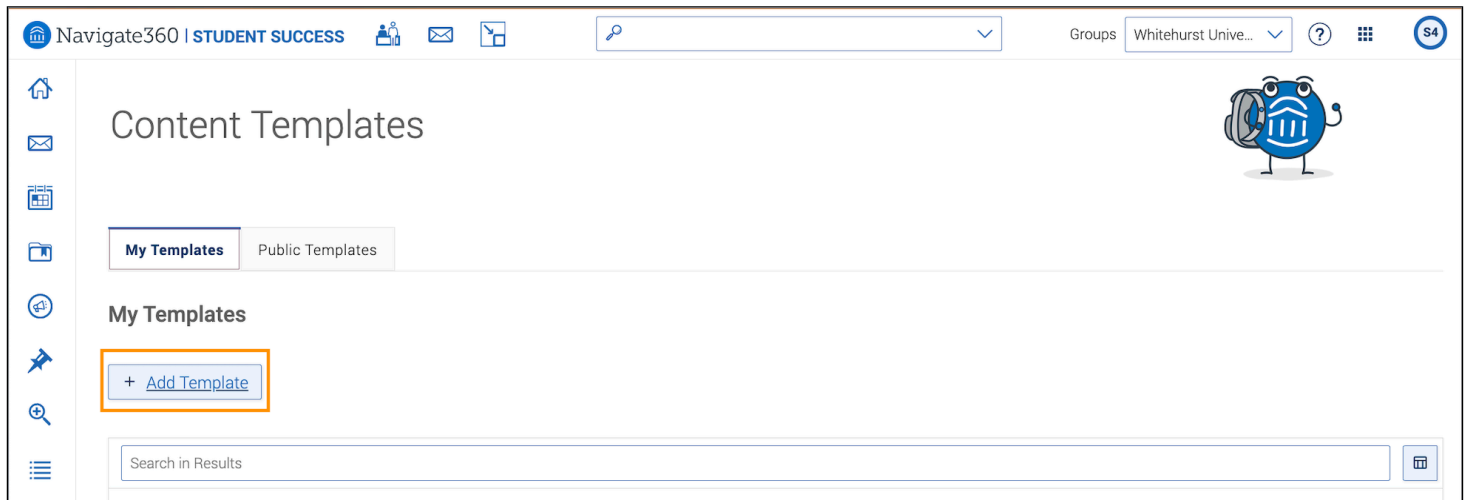
Email & Text Message Content Templates

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

Access content templates by going to User Settings >> Content Templates.



Click on "Add Template" to start working with a blank template.



Users will select applicable configurations and compose their content on the left-hand side of the page. Marking "Template is Active" will allow for the end user(s) to select the template when composing email or text messages throughout the Navigate360 platform. Marking "Make Template Public" will allow all users with appropriate permissions to see the content template when composing email or text messages. If this box is left unchecked, only the individual user who created the content template will be able to select it when composing email or text messages.

Email templates allow users to use updated Rich Text Formatting options and add attachments, while text message templates are limited to 300 characters (note: these characters must be within the GSM-7 character set).

Compose Template

General Settings

Template Name *

☒ Template is Active

Template Description

☐ Make template public

Template Content

Template Type ⓘ

☒ Email ☐ Text

Subject

Message

Paragraph ▾ **A** ▾ A ▾ A[≡] ▾ A₁ ▾ **B** *I* |   ▾  ▾ | ↶ ↷ |   ▾

✓ AI Auto Enhance ⓘ

✓ AI Message Assistant ⓘ

Attachments

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

On the right hand side of the page, a preview of the content is generated and can be viewed in the frame of a Mobile Device, Tablet, or Desktop.

Preview



Mobile



Tablet



Desktop

Subject: Important Dates: Payment Deadline and Late Fee Information



This is a reminder that the deadline to submit tuition payment for the [Term/Year] semester is approaching. Please ensure that your payment is made by [Payment Deadline Date] to avoid any late fees.

Key details:

- Tuition Payment Deadline: [Payment Deadline Date]
- Accepted Payment Methods: [Payment Methods Accepted]
- Late Fee Information: A late fee of [Amount] will be applied for payments received after the deadline.

If you have any questions regarding your tuition payment or need assistance with financial arrangements, please contact our Bursar's Office at [Bursar's Office Email] or [Bursar's Office Phone]. We are here to assist you and ensure a smooth start to the semester.



Navigate360

After a user selects "Save Template," their content template will display on their "My Templates" tab:

On the "Public Templates" Tab, users will see content templates that have been marked as a Public Template by other users (with appropriate permissions) at their institution, as well as a few EAB Starter Templates. These templates may be left for use by end users, edited, or deleted by the application administrator before granting end users permissions to use content templates.

Use the actions menu to edit, copy, preview, or delete existing content templates.

8/7/24, 11:25 AM

Staff Workflows & Automations - STC 24.13 Release Notes – Help Center

Navigate360 | STUDENT SUCCESS

Groups Whitehurst Unive... ? 54

Content Templates

My Templates

Public Templates

Public Templates

Search in Results

NAME	DESCRIPTION	TYPE	CREATED ON	CREATED BY
Deadline Approaching	EAB Starter Template - Registration Deadline	Email	07/23/2024	
Complete Your FAFSA b...	EAB Starter Template - FAFSA Completion	Email	07/23/2024	
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 5100K<1>>X

After one or more content templates have been made available to an end user, they will have the option to select an email or text message template when composing an email or text message throughout the Navigate360 platform:

Send A Message

Email

Text

To: David Johnson

Apply a Template

Note: Loading a template will overwrite any content you have entered.

Email Template

Select Message Content Template

Default

My Templates

Welcome to Whitehurst!

Public Templates

Course Registration Deadline Approaching

Financial Aid Reminder: Complete Your FAFSA by [DATE]

Update

AI Auto Enhance

AI Message Assistant

Add Attachment:

Drag & Drop your files or Browse

Send Additional E-mail Notifications To:

Send Message

Cancel

https://helpcenter.eab.com/hc/en-us/articles/24942172942999-Staff-Workflows-Automations-STC-24-13-Release-Notes

5/5