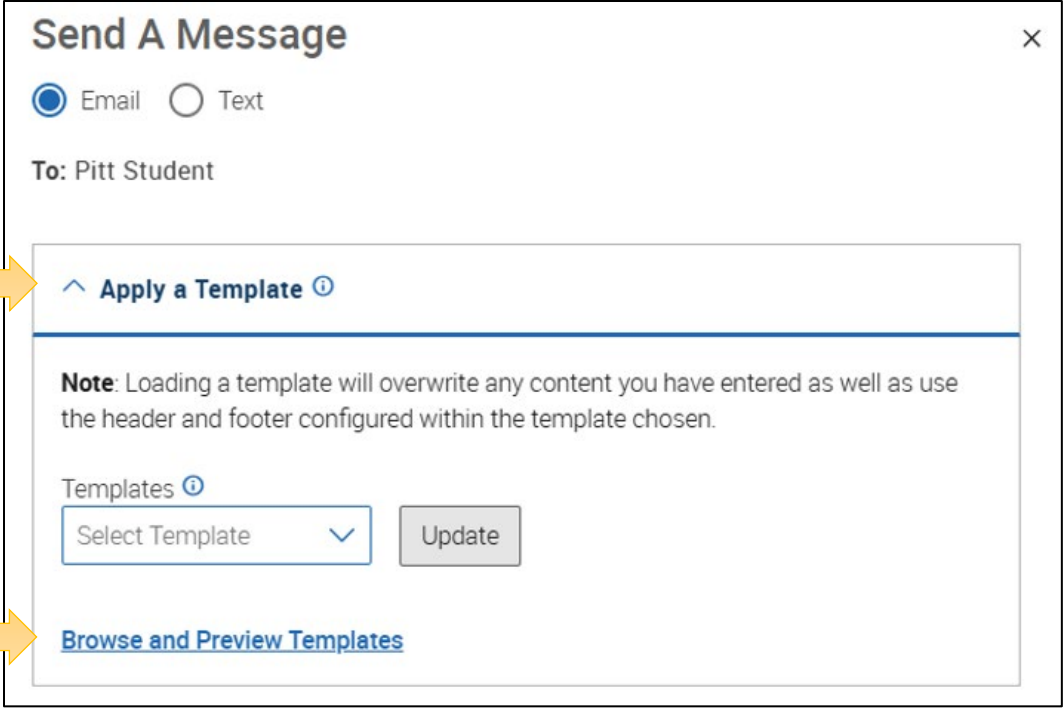


Creating and Using Content Templates

Pathways users can create and save templates to their account that can then be used in messages, campaigns and email communications, and edited as necessary.

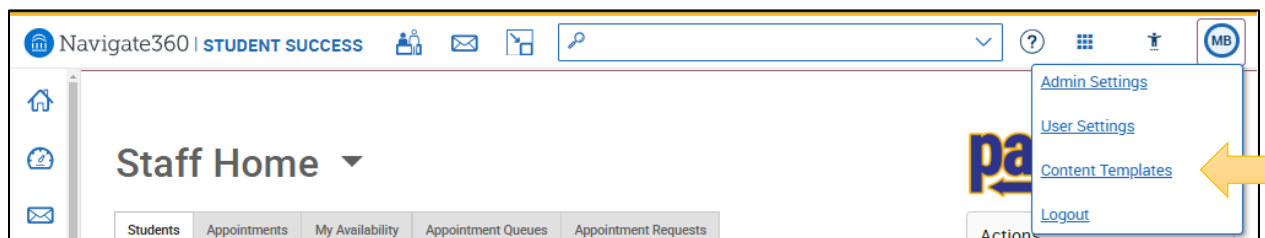
Templates can be applied when composing messages or emails. Select the **Apply a Template** option to access the drop-down menu of templates.

From here, clicking **Browse and Preview Templates** takes you to the Content Templates page where you can browse publicly available templates and create your own templates.



The screenshot shows a 'Send A Message' dialog box. At the top, there are radio buttons for 'Email' (selected) and 'Text'. Below this is the 'To: Pitt Student' field. A section titled 'Apply a Template' with an upward arrow icon contains a note: 'Note: Loading a template will overwrite any content you have entered as well as use the header and footer configured within the template chosen.' Below the note is a 'Templates' section with a dropdown menu labeled 'Select Template' and an 'Update' button. At the bottom of this section is a blue link labeled 'Browse and Preview Templates'. Two yellow arrows point to the 'Apply a Template' section header and the 'Browse and Preview Templates' link.

The Content Templates page can also be accessed by clicking your **initials** in the top right of any Pathways screen and selecting **Content Templates**.



The **Content Templates** page is below.

The screenshot shows the 'Content Templates' page in the Navigate360 system. The page has a top navigation bar with 'Navigate360 | STUDENT SUCCESS' and a search bar. A user menu is open in the top right, showing 'Admin Settings', 'User Settings', 'Content Templates' (highlighted with an orange arrow), and 'Logout'. The main content area has two tabs: 'My Templates' and 'Public Templates' (highlighted with an orange arrow). Below the tabs is a '+ Add Template' button (highlighted with an orange arrow). A table lists templates, with the first row 'Fall Term Check-in' highlighted. A context menu is open for this row, showing 'Edit', 'Copy', 'Preview', and 'Delete' (highlighted with an orange arrow). A text box explains that public templates can be copied and edited. Another text box explains that the stacked bar menu button is used to edit, copy, preview, or delete the selected template.

Access public templates that have been made available to you. You can copy a public template and then edit it to fit your specific communication needs.

Use the stacked bar menu button to edit, copy, preview or delete the selected template.

To create a content template of your own, press the blue **Add Template** button.

On the Add Template page, add the **Template Name** and **Template Description**. These will be visible on the Choose the Template Type. The Branding Template must be left as the default *System Branding Template*.

The screenshot shows the 'Compose Template' form. It has two main sections: 'General Settings' and 'Template Content'. In 'General Settings', the 'Template Name' field is filled with 'Fall Term Check-in' (highlighted with an orange arrow), and the 'Template Description' field is filled with 'Email to advisees for fall term check - in' (highlighted with an orange arrow). The 'Template is Active' checkbox is checked. In 'Template Content', the 'Template Type' is set to 'Email' (highlighted with an orange arrow). The 'Branding Template' is set to 'System Branding Template' with a dropdown arrow and an 'Update' button.

Compose Template

General Settings

Template Name *
Fall Term Check-in

☒ Template is Active

Template Description
Email to advisees for fall term check - in

Template Content

Template Type
☒ Email ☐ Text ☐ Landing Page

Branding Template *
System Branding Template x v Update

For email templates, add the **Subject** and **Message** text, and any attachments. For text message templates, just add the text. You can see a preview of your message at this time and also send yourself a sample message at this time, prior to saving your template.

*Note – **Merge Tags** cannot be added to the content templates at this time, but can be added later when applying the template to an email or other conversation message.*

The image displays the email template creation interface, divided into two main sections: the editor and the preview.

Editor Section (Left):

- Header:** Features the "pathways" logo.
- Subject:** A text input field containing "Schedule a check-in appointment today!".
- Message:** A rich text editor with a toolbar (Paragraph, Bold, Italic, Underline, Link, Bulleted List) and a text area containing two paragraphs of sample text.
- Attachments:** A section with a "Drag & Drop your files or Browse" button.
- Footer:** Contains the text "Questions? Please email PathwaysHelp@pitt.edu." and the "Navigate360" logo.

Preview Section (Right):

- Preview:** A header for the preview area.
- Device Selection:** Buttons for "Mobile", "Tablet", and "Desktop".
- Send Sample:** A button to send a sample message to oneself.
- Mobile Preview:** A large black-bordered box showing the template's appearance on a mobile device. It includes the subject, logo, message text, footer text, and logo.
- Save Template:** A blue circular button with a white checkmark icon, located at the bottom right of the mobile preview.

Click the blue Save Template button when you are finished.



Your template will now be available to apply when sending new messages or creating appointment or email campaigns.

To use a content template when sending a message or creating campaigns, select the **Apply a Template** option to access the drop-down menu of templates. After selecting your template, press the blue **Update** button.

Send A Message [X]

☒ Email ☐ Text

To: Pitt Student

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 ⓘ

Fall Term Check-in [X] [v] [Update]

[Browse and Preview Templates](#)

Subject:

Schedule a check-in appointment today!

Message:

Paragraph [v] [A] [A] [A] [A] [B] [I] [link] [list] [more]

I hope you had a great summer! Please schedule a meeting during the first few weeks

Note – At this point is when **Merge Tags** can be added to personalize the message.

Message:

Paragraph [v] [A] [A] [A] [A] [B] [I] [link] [list] [more]

Hi, {Recipient_name}

I hope you had a great summer! Please schedule a meeting during the first few weeks of the term to discuss anything from your fall term class schedule to

Below are some resources that might be helpful as you begin the term

{Semail_signature}

Merge Tags [v]

- Recipient Name
- Recipient First Name
- Recipient Last Name
- Personal Availability Link
- Email Signature

Edit and send your message just as your normally would.