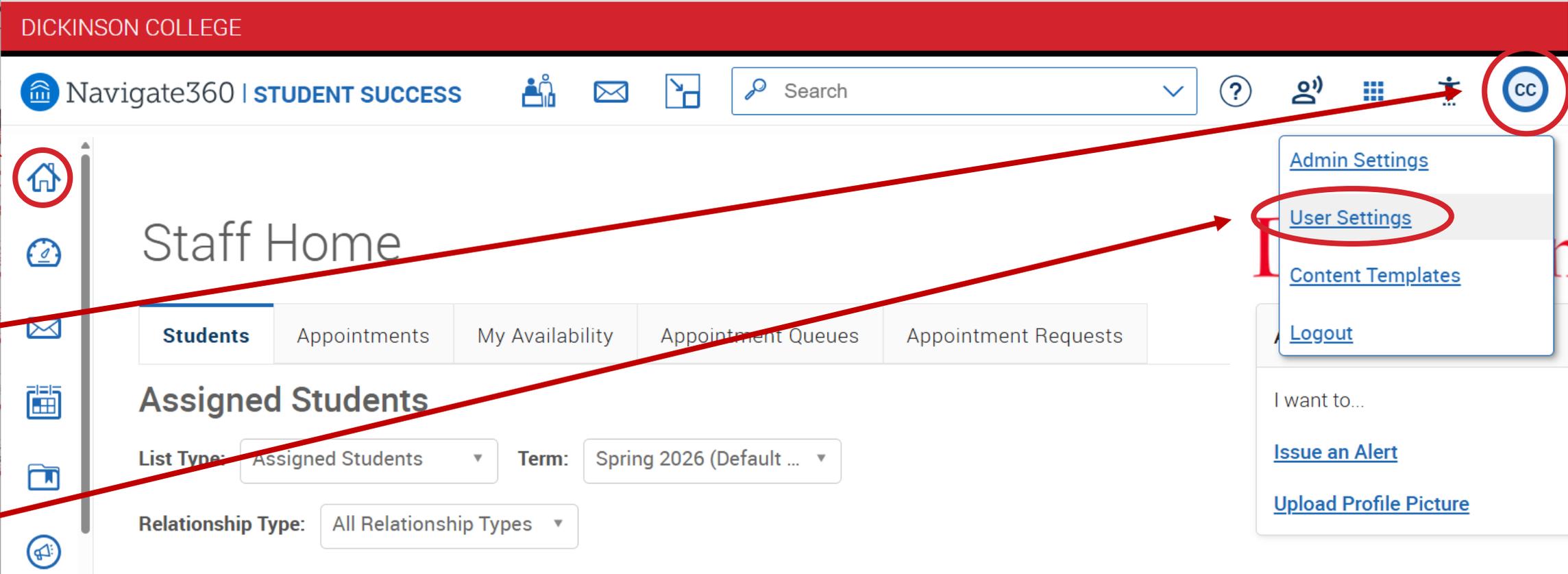


Dickinson

**Using Navigate360:
How to Use Content Templates &
Messaging Campaigns**

Set up your Email Signature

- 1. Go to **Home** (if not there already).
- 2. Click your initials in the top right corner.
- 3. Click **User Settings**.



Set up your Email Signature

4. Scroll down to **Email Signature**.
5. Copy and paste your email signature into the box. Format as needed.
6. Click **Save**.

The screenshot shows the Dickinson College Navigate360 Student Success interface. At the top, there is a red header with "DICKINSON COLLEGE" and a navigation bar with "Navigate360 | STUDENT SUCCESS" and various icons. The main content area is titled "Staff Home" and includes tabs for "Students", "Appointments", and "My Availability". Below these is the "Assigned Students" section with filters for "List Type" (Assigned Students) and "Term" (Spring 20). A table with columns "NAME", "ID", and "CUMULATIVE G" is partially visible. On the right side, the "Email Signature" editor is open, showing a rich text editor with a "Paragraph" dropdown and bold/italic buttons. The signature text is: "Caitlin Copus, MA (she/her/hers)", "Assistant Director of Student Success", "Dickinson College", "Student Success & Academic Advising", "Biddle House 103 | 717-245-1045", "P.O. Box 1773 | Carlisle, PA 17013-2896", and "[www.dickinson.edu](\"http://www.dickinson.edu\")". Below the signature is a note: "Students: To schedule an appointment with me, please visit my calendar in [Navigate!](\"#\")". At the bottom right of the editor, there are "Save" and "Cancel" buttons. Red arrows from the instructions point to the "Email Signature" section and the "Save" button.



Create a Messaging Campaign

1. Click **Campaigns & Events** (the megaphone on the left side menu).
2. Under **Messaging Campaigns** click **Add New**.

Campaigns & Events

Student Campaigns

Student Campaigns are campaigns that can be sent directly to the students to complete a specific action or to be notified at different times.

[Appointment Campaigns](#)

Allows staff to reach out to specific student populations and encourage them to schedule appointments. Appointment Campaigns are best deployed by staff members seeking to encourage students to meet with them for advising or other services.

[+ Add New](#)

[Messaging Campaigns](#)

Email or text a group of students on specified dates about certain things they may need to do or attend.

[+ Add New](#)

Create a Messaging Campaign

3. Enter a **Campaign Name**.

4. Select a **Campaign Launch Date**
(defaults to today, but you can select a future date).

5. Click **Continue**.

DICKINSON COLLEGE

Navigate360 | STUDENT SUCCESS

Search

Set up your campaign.

Campaign Information

Campaign Name *

Tracking URL ⓘ

Tracking URL Display Value ⓘ

Campaign Timing

Campaign Launch Date * ⓘ

Cancel Save and Exit

Create a Messaging Campaign

6. Use the filters to find the students you plan to send the messaging campaign to.

The screenshot shows the Dickinson College Navigate360 Student Success interface. At the top, a red header contains the text "DICKINSON COLLEGE". Below this, a navigation bar includes the "Navigate360 | STUDENT SUCCESS" logo, several icons (people, envelope, document), and a search box with the text "Search".

The main content area features a breadcrumb trail: "Define Campaign" (with a checkmark icon) — "Select Recipients" (highlighted in a blue box with a flag icon) — "Compose Nudges" — "Verify & S" (with a lock icon).

The central heading is "Add Recipients To Campaign". Below it, a sub-heading reads "Add Recipients to your campaign now, later, or through automation" with an information icon (i) to the right.

The primary focus is a "New Search" modal window. It has a dark header with "Saved Searches" and a dropdown arrow. The main area contains a text input field with the placeholder text "Keywords (First Name, Last Name, E-mail, Student ID)". Below the input field is a question mark icon and a white rectangular button.

A vertical sidebar on the left side of the interface contains several icons: a home icon, a clock, an envelope, a calendar, a folder, a megaphone, a pushpin, a magnifying glass with a plus sign, and a right-pointing chevron.

Create a Messaging Campaign

Assigned To

Student has relationship
Undeclared

[+ More Assignments](#)

Staff

✕ Copus, Caitlin (she/her/hers)

To filter by your advisees, use the **Assigned To** section. You must fill in both the **relationship type** (Academic Advisor, Major OR Undeclared) **AND** select your name in the **Staff** section.

Term Data Classification, Section Tag, Term GPA

Term ?
Spring 2026

Min. Credit Hours ?
0

Max. Credit Hours ?
999

Min. Term GPA ?
0.00

Max. Term GPA ?
5.00

Enrolled with Professor ?
All

Section Tagged With ?
All

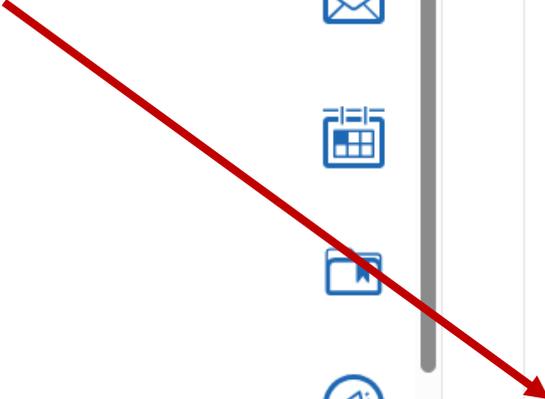
Classification (In Any of these) ?
✕ Freshman

Classification (In None of these) ?
All

To filter by class year, use the **Classification** filter, located in the **Term Data** section.

Create a Messaging Campaign

7. Click **Search**.



Navigate360 | STUDENT SUCCESS

Assigned To

Polls Questions, Choices?

Success Indicators Retention Vulnerability

Nav Info Milestone filters

Search Include Inactive My Students Only

Search

Create a Messaging Campaign

8. Check to see if your list looks like what you meant to pull. When you're ready, check the box at the top of the list to the left of the word name to select all students.

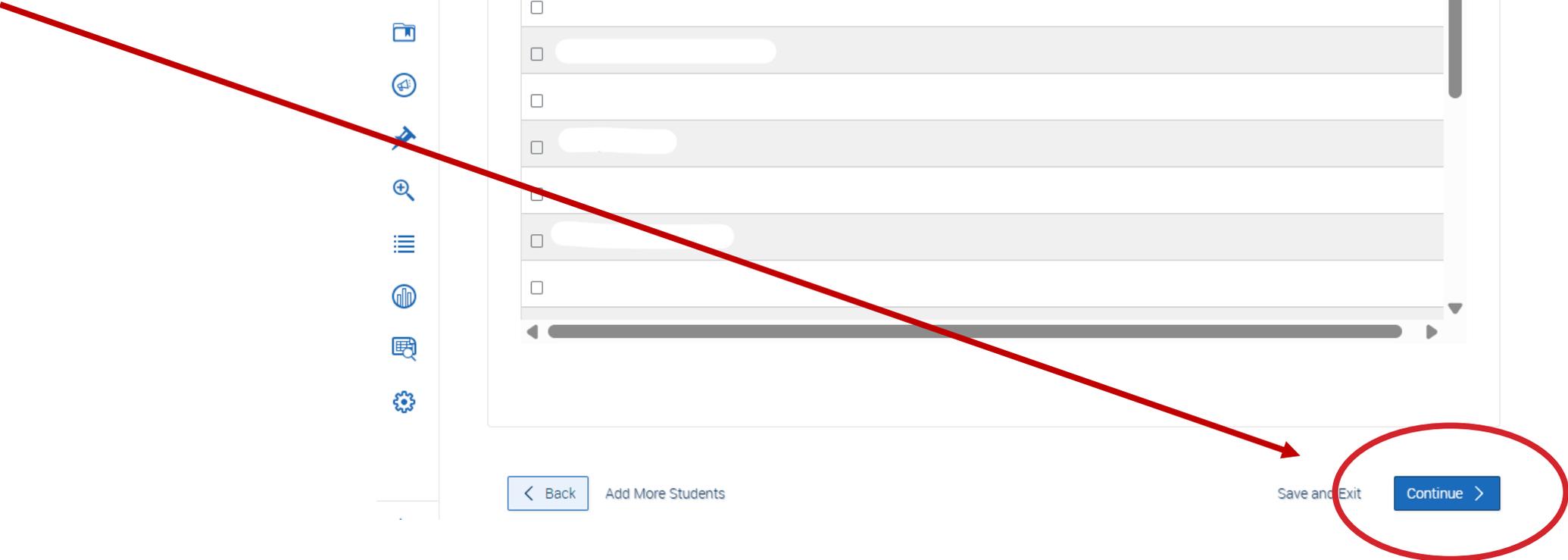
9. Click **Continue**.

The screenshot shows the Dickinson College Navigate360 interface. At the top, there is a red header with "DICKINSON COLLEGE" and a navigation bar with "Navigate360 | STUDENT SUCCESS" and a search bar. A sidebar on the left contains various icons. The main content area displays a table with a header row containing "NAME" and "ID". The "NAME" column has a checkbox next to it, which is circled in red. Below the header, there are eight rows of student data, each with a checkbox in the "NAME" column. A red arrow points from the text in step 8 to this checkbox. At the bottom of the table, there are "Previous", "1", and "Next" buttons. To the right of the table, it says "20 total results". At the bottom right of the interface, there is a blue "Continue" button with a right-pointing arrow, which is circled in red. A red arrow points from the text in step 9 to this button. A "Back" button is also visible at the bottom left of the interface.

	NAME	ID
1.	<input checked="" type="checkbox"/>	900992048
2.	<input checked="" type="checkbox"/>	900988216
3.	<input checked="" type="checkbox"/>	900990219
4.	<input checked="" type="checkbox"/>	900986553
5.	<input checked="" type="checkbox"/>	900975294
6.	<input checked="" type="checkbox"/>	900968482
7.	<input checked="" type="checkbox"/>	900985371
8.	<input checked="" type="checkbox"/>	900969531

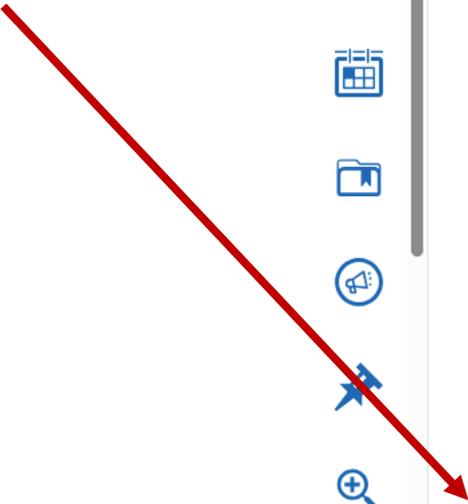
Create a Messaging Campaign

10. Click **Continue**.



Create a Messaging Campaign

11. Click **Add Welcome Message**.



The screenshot shows the Dickinson College Navigate360 interface. At the top, a red header contains 'DICKINSON COLLEGE'. Below it, a navigation bar includes 'Navigate360 | STUDENT SUCCESS', icons for people, mail, and a calendar, and a search box. A vertical sidebar on the left contains icons for home, clock, mail, calendar, folder, megaphone, and a plus sign. The main content area is titled 'Messaging Campaign: test' and features a progress bar with four steps: 'Define Campaign' (checked), 'Verify Recipients' (checked), 'Compose Nudges' (active, highlighted in blue), and 'Verify & Start' (locked). Below the progress bar, the 'Compose Nudges' section is displayed. It has a sub-header 'Nudges' and a descriptive paragraph: 'Add a nudge to send to the students you have selected on specific dates or relative time intervals. You can have as many nudges as you would like.' At the bottom of this section is a button labeled '+ Add Welcome Message', which is circled in red. A red arrow from the text on the left points to this button.

Use a Template Message

Compose Email

12. Click **Apply a Template**.

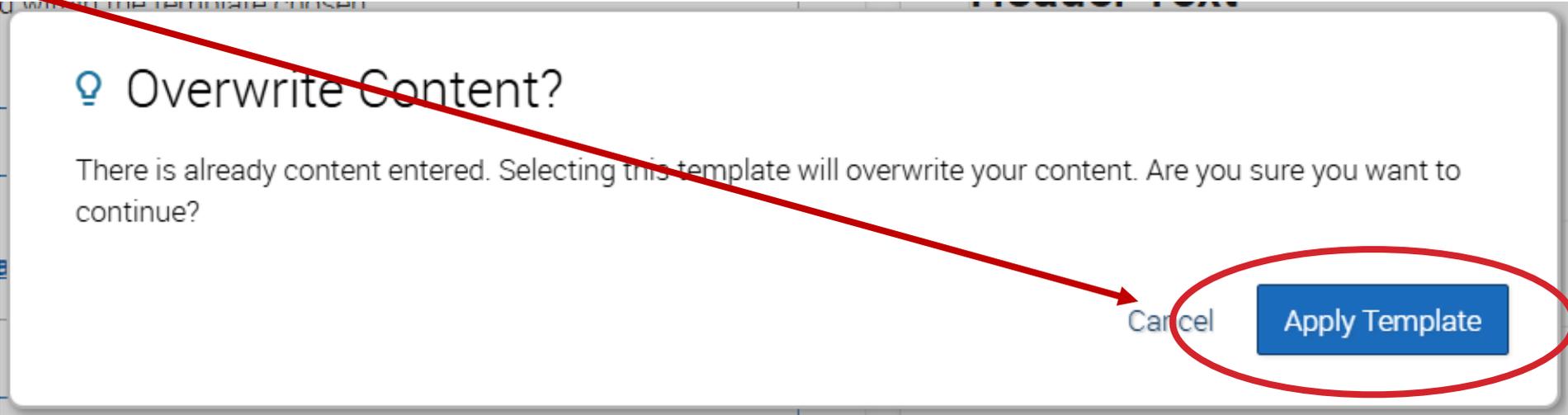
13. Select the appropriate template from the dropdown menu.

14. Click **Update**.

The screenshot shows the 'Compose Email' interface. At the top, there is a button labeled 'Apply a Template' with an information icon, which is circled in red. Below this is 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.' Underneath the note is a section titled 'Templates' with an information icon. It contains a search box labeled 'Select Template' and an 'Update' button, both circled in red. A dropdown menu is open below the search box, listing several templates: 'Template', 'First Year Touchpoint 1 - Welcome (Prior to Orientation)', 'First Year Touchpoint 2 - Continued Welcome (Second Week of Class)', and 'First Year Touchpoint 3 - Prep for Spring'. The first dropdown arrow is also circled in red. At the bottom of the interface, there is a rich text editor toolbar with icons for text color, background color, text color with background color, bold, italic, link, bulleted list, and a menu icon.

Use a Template Message

15. Click **Apply Template**.



Use a Template Message

16. Review the message in the preview section. Double check for any dates that may need updated in the template. Make any updates as needed.

17. Click **Save Welcome Message**.

Attachments

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

Welcome Message Date: 🕒 02/26/2026

Nudge Dates:

* Specific Dates:
N/A

* Relative intervals after added to campaign:
N/A



Finish the Messaging Campaign

18. Click **Continue**.

Nudges

Add a nudge to send to the students you have selected on specific dates or relative time intervals. You can have as many nudges as you would like.

+ Add Nudge

Welcome Message

Send Date: 02/26/2026 

Email Subject: Orientation is Almost Here!

Email Message: Hi {first_name}! I hope your bags are almost pa...

[Save and Exit](#) [Continue >](#)

Finish the Messaging Campaign

19. Click **Start Campaign**.

The screenshot shows the Dickinson College Navigate360 interface for configuring a messaging campaign. The page is titled "DICKINSON COLLEGE" and "Navigate360 | STUDENT SUCCESS". The main content area is divided into three sections: "Define Campaign", "Recipients", and "Welcome Message".

- Define Campaign:** Name: test; Tracking URL: (empty); Tracking URL Text: (empty).
- Recipients:** A "View Recipients" button is present.
- Welcome Message:** Send Date: Day added; Subject: Orientation is Almost Here!; Sender Name: Caitlin Copus (she/her/hers); No Reply Email Address: copusc@dickinson.edu; Reply-To Email Address: copusc@dickinson.edu; Email Preview: View Email button.

At the bottom of the page, there are three buttons: "Back", "Save and Exit", and "Start Campaign". The "Start Campaign" button is circled in red, and a red arrow points from the text "19. Click Start Campaign." to it. The footer includes the EAB logo, links for Privacy Policy, Legal Disclaimer, Terms of Use, and Download Acrobat Reader, along with copyright information and a page refresh timestamp.