

Event Save Email Overview



Note: This Feature Was Previously a Part of BPEs

This feature is a partial replacement for the features that were included in business process extensions (BPEs), but with improved functionality and an easier, more convenient interface.

25Live allows administrators to automate messages using the Event Save Email section in [System Settings](#). These email can trigger when an event saves after:

- Event Creation
- Event Edit
- Both on Event Creation and Edit

First, an administrator creates a scenario that outlines the parameters for sending an email(s), then template(s) are created that specify the content of the email(s) using template variables.

Scenarios

Create Scenario

X

Scenario Name:

Active: No Yes

Scheduled: No Yes

Scenario Instructions ⓘ

When an event is saved or tasks page is triggered, 25Live checks the criteria below. A criteria matches if at least one of its "Include Any", and none of its "Include None" values match. If all criteria match, then email(s) and/or To Do task(s) will generate based on the selected templates. Be sure to preview your scenario before saving.

Create To Do: No Yes

Trigger Actions On:

Event Creation Event Edit Both

Trigger Template Actions When Saving From:

Event Form

Event State Dropdown

Express Scheduling

Tasks Page

Cancel Request

Image: Scenarios can be scheduled to be sent later or marked inactive to save indefinitely.

An administrator creates different scenarios for the circumstances under which an automated, custom email should be sent. Emails can be scheduled, sent only when a change occurs, or marked inactive. Criteria and pre criteria that can be specified includes:

- **Criteria** - *Correspond to the values saved after creation or edit:*
 - Event States *(includes inline editing from [Event Details](#))*
 - Event TypesLocations *(the event was requested for)*
 - Resources *(the event was requested with)*
 - Primary Organizations
 - Requirements
 - Security Groups *(of the user that will be taking the action when the email is triggered)*
 - Custom Attributes
 - Expected Headcount
 - Tasks
- **Pre Criteria** - *Correspond to the values in place before editing:*
 - Event States *(includes inline editing from [Event Details](#))*

- Event Types
- Locations (*the event was requested for*)
- Resources (the event was requested with)
- Primary Organizations
- Requirements
- Custom Attributes
- Expected Headcount

Additional options are available to adjust where email is triggered from, allow for [Silent Save](#) (which prevents all automated Event Save functionality from triggering, including emails and the creation of To Do tasks), and more.

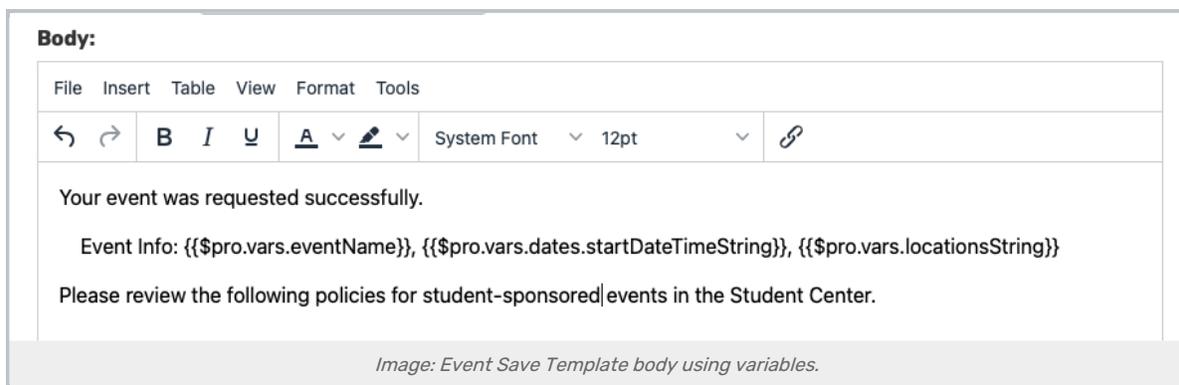
Scenarios send emails based on templates. Multiple email templates can be sent from one scenario, and templates can be used in more than one scenario.

See [Event Save Email: Creating, Copying, and Editing Scenarios](#) for step-by-step instructions and examples.

Templates

There are two types of templates that can be used in scenarios:

- Event Save Email Templates
- To Do Templates



Administrators can create templates for any custom emails that will be automatically triggered, scheduled, or [manually sent](#). Templates specify who the email will be sent to, a subject line, and body content for the email. Template variables can be used in any of these fields for dynamic content based on event information.

Templates can use HTML formatting and feature an advanced code view as well as an easy editor. Administrators can preview what the resulting email will look like with an event reference ID.

Create New To Do Template

✕

Template Name:

Template Instructions ⓘ

You may use an option below for the Assigned By and Assigned To fields:

- Specific contacts chosen via Select Contacts
- The contact ID variable for an event role (found under Template Variables).
- The "Assigned To" user will need at least Edit rights on the event in order for the To Do task to be assigned to them.

Task Name

Assigned By:

Assigned To:

Due Date: (+/- days from the first occurrence)

Comment:

Template Variables ▼

Advanced

Preview by Reference

Image: To Do templates are also used in scenarios

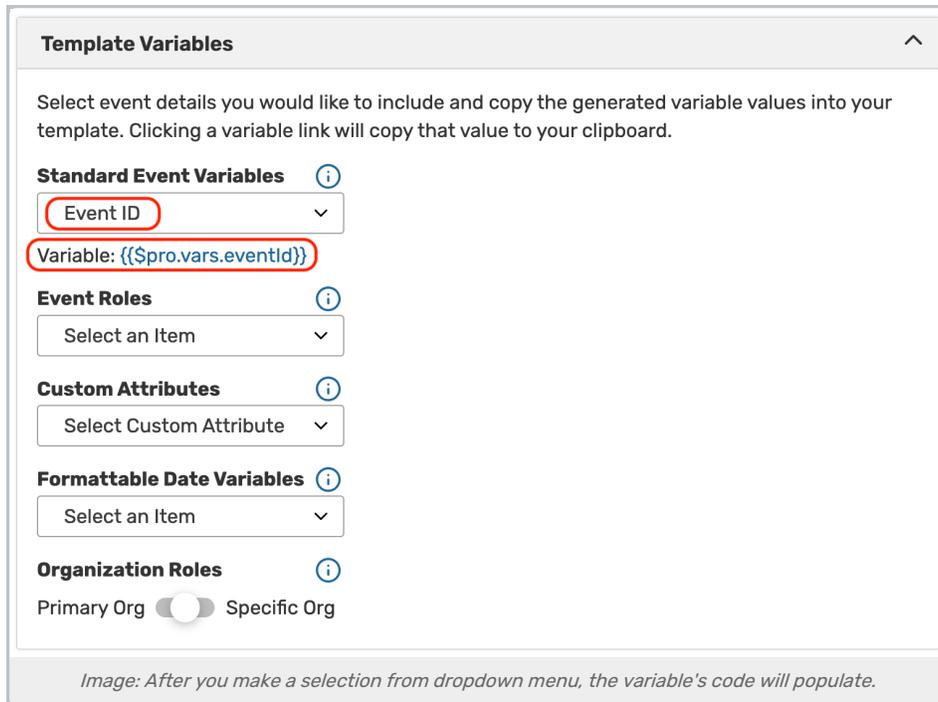
To Do Templates can include assignees, a due date, and comments that can use some template variables.

See [Creating, Copying, and Editing Email Templates](#) for step-by-step instructions and examples.

Also, see [Using Manual Email Templates](#) for another way to use templates.

Template Variables

Event Save Templates in 25Live can be built from a library of variables used to dynamically pull event information into content. Administrators can browse through all variables in a convenient interface while creating email templates, then copy them to paste into content fields.



Variable categories include:

- Standard Event Variables
 - Event detail variables
 - Contact and Organization variables
 - Date and time variables
 - Occurrence variables
 - Location and Resource variables
- Event Roles
- Custom Attributes
- Formattable Date Variables
- Table Builders
- List Builders

See [Event Save Email Template Variables - Reference and Examples](#) for more detail.

Also, see more on [Creating and Managing Custom Contract Documents](#) and [Utilizing Custom Contract Documents](#).