

Creating, Copying, and Editing Email Templates



Security Note: These Settings Require Administrative Access

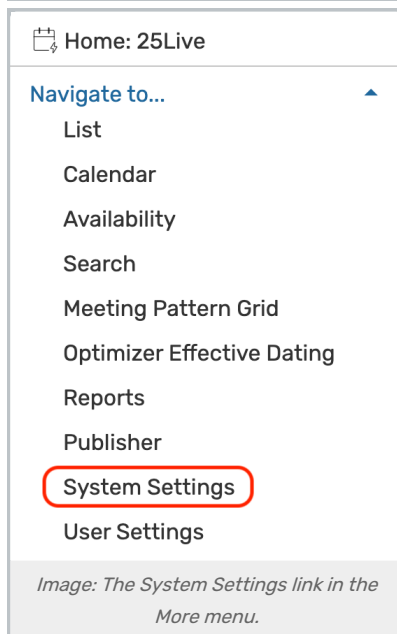
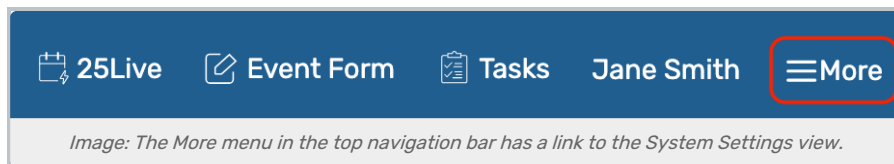
To access the System Settings views, your 25Live user must be in the System Administrator (-1) security group. If you would like any of the described settings changed for your instance of 25Live, contact your 25Live administrator.

Event Save Email templates allow 25Live administrators to set up email content to send manually or send automatically using [scenarios](#) outlining the rules under which custom emails will be sent.

How to Create Event Email Templates

1. Go to the System Settings View to Access Event Save Email

The **System Settings** section is accessible from the **More** menu in [the top navigation bar](#).



Tap or click on **Event Save Email** to reveal the section.

System Settings

General Settings

Event Save Email

Event Form Settings

Image: Tap or click on Event Save Email to access the scenario and template settings.

2. Access Template Creation

Use the **Template Settings** heading in the Event Save Email section and choose the **Emails** tab. You can also access the button for creating new templates from within the views for creating or editing scenarios.

Scenario Settings

Template Settings

Emails

To Dos

Template Settings

Add Template

Filter:

Name	Manual
Cancelled Athletic Spaces	Yes
Club Advisor Notification	No
Event Cancellation	No

Templates

Select Templates

Cancelled Athletic Spaces

Create New Email Template

Image: Template options within a scenario.

3. Choose to Create a new Template or Copy an Existing Template

Scenario Settings

Template Settings

Emails

To Dos

Help

Template Settings

Add Template

Filter:

Preview reference: YYYY-ABCDEF

Name	Manual	iCalFile	To	Tags	Preview	Copy	Edit	Delete
Cancelled Athletic Spaces	Yes	No	{{ \$pro.vars.requesterEmail }}	Add	Preview	Copy	Edit	Delete
Club Advisor Notification	No	No	{{ \$pro.vars.primaryOrganization.contacts.4.email }}	Add	Preview	Copy	Edit	Delete
Event Cancellation	No	No	{{ \$pro.vars.roleContactFirst.-1 }}	Add	Preview	Copy	Edit	Delete
Event Confirmation	Yes	No	{{ \$pro.vars.requesterEmail }}	Add	Preview	Copy	Edit	Delete
Food Prep - Required Waiver	No	No	{{ \$pro.vars.roleContactEmail.-1 }}	Add	Preview	Copy	Edit	Delete

Image: Use the Add Template button to create a new template or the Copy button to copy and edit an existing one.

If you'd like to use one of your existing templates as a base to create a new template, tap the **Copy** button associated with the template. The template information fields will populate for you to edit in your new copy. Otherwise, click the **Add Template** button to start from scratch.



Note: Tagging Templates

Currently, only manual templates are impacted by [system tag security](#). Use the **Tags** column to view existing template tags and add new ones.

4. Complete or Edit the Initial Name and Setting



Tip: Who is the Email Sender?

The user performing the action that sends an email using the current template will be listed as the sender of the email.

The screenshot shows a form with two main sections. The first section is labeled 'Template Name' and contains a text input field with the value 'Event Confirmation'. The second section is labeled 'Manual Template?' and contains a toggle switch set to 'No'. Below these fields is a caption: 'Image: The initial field and setting help identify your email template for use.'

Add or edit a unique name into the **Template Name** field. The name is not displayed anywhere in the resulting email but is only used for internal identification, such as when referenced in scenarios.

The **Manual Template** field sets this template as one to be used when [emailing event details](#) or other, non-automated uses.

5. Add or Edit Email Recipient Fields

Your contact's email address will be used as the "From" address unless you customize it. If you'd like to update the From address, toggle **Custom "From" Address** to **Yes** to populate the field.

The screenshot shows a form with several sections. At the top is a toggle switch for 'Custom "From" Address:' set to 'No'. Below this are three text input fields labeled 'To', 'CC', and 'BCC'. Under the 'Reports' section, there are two checkboxes: 'Confirmation' and 'Invoice', both of which are unchecked. Below these checkboxes is a button labeled 'Select Reports'. At the bottom of the form is a caption: 'Image: Use the toggle to add a From email field.'

Enter the desired values in each field. The fields correspond to standard email sending fields, and Template Variables ([see reference](#)) can be used. In addition, a number of special recipient shortcuts are available for use in

the **To** (*required*), **CC**, and **BCC** fields.

Shortcut	Recipient
object owner	Object owner
service providers	Any user with approval workflow (notifications)
assigners	Any user with assignment policy workflow
<event contact role name>	The email address associated with the contact in this role, eg "scheduler" or "emergency contact"
<custom attribute name>	The email address associated with the contact in this custom attribute (<i>uncommon</i>)



Tip: Separate Multiple Values with a Comma

Any multiple values, such as variables or email addresses (in the To, CC, or BCC fields) or reports values should be comma-separated.

No single or double quotes are needed.

6. Optionally Attach Reports

Reports
☐ Confirmation
 ☐ Invoice

Select Reports

iCal File

No ☒ Yes

Image: The Report field in the event email template.

The **Report** field features convenient checkboxes to choose between available report attachments as well as a button to select object-specific reports.

- **Confirmation:** Attaches the default event confirmation report
- **Invoice:** Check this box to attach the default invoice for the Event Type used

Toggle the **iCal File** button to **Yes** to attach an iCal file.

7. Add or Edit an Email Subject

Subject

Image: The subject field in the event email template.

You can freely type in the **Subject** field as well as use template variables to create a dynamic email subject.



Using Template Variables

Template variables are encoded values that will pull data dynamically into your resulting email, such as using the requestor's email in the To field, the scheduler's email in the CC field, and the event name in the subject.

[View List of Template Variable Examples](#)

8. Add or Edit Content for the Email Body

Your event {{ \$pro.vars.eventName }} has been confirmed.

Organization Name: {{ \$pro.vars.primaryOrganization.itemName }}

Event Time: {{ \$pro.vars.dates.eventStartDate | short }} - {{ \$pro.vars.dates.eventEndDate | short }}

Event Location: {{ \$pro.vars.locationsString }}

Image: Template variable can be used in the body of the email.

The body field accepts rich text editing and provides you with editing and styling controls. There's a very large allowance (2 gb) for the email body field. This limit accounts for the data space used for content formatting you use, such as bolding, italicized text, different font size/color, tables, etc. Any of those formatting features that go beyond plain text will increase the data amount in your template body.

You can use Template Variables throughout the text in this field. Any styling, such as bold or italics, applied to the variable will be applied to the output value. See **Using Template Variables** above. For example, if you want to confirm for the requestor that their event request was successfully sent, you could echo some of that information back to them:

Event Name: {{ \$pro.vars.eventName }}

Event Organization: {{ \$pro.vars.primaryOrganization.itemName }}

Event Start Date and Time: {{ \$pro.vars.dates.eventStartDate | short }}

Event End Date and Time: {{ \$pro.vars.dates.eventEndDate | short }}

Event Location: {{ \$pro.vars.locationsString }}



Note: Pre Variables

Variables with a "pre" prefix will display information from an event prior to edit (for example, information

from the previous state of an event before saving it as cancelled). This includes documents created in Document Management when they are sent through an Event Save Email.

Note: For Experts, Advanced Editing Is Also Available With Source Code and Code View

Template editing provides two advanced options:

When editing the template body, you can use the **Tools** menu to view the **HTML Source Code**.

If you wish to work in JavaScript using the Code View.

- The **Convert to Code View** button e(revealed under the **Advanced** heading) will take any form input and convert it to JavaScript, overwriting any customized code already entered in code view.
- Using the **Switch to Code View** button will open the Code View without overwriting any code already entered.
- Two versions of any scenario or template can exist at any time, the Form View and the Code View. The system will use the version that was *last saved*.
- If you wish to go back, a **Back to Form View** button will be available.

Code View is available for technical experts who know how to write code. Troubleshooting these customizations in this advanced mode is beyond the scope of our technical support.

9. Optionally Preview Your Template by Reference

Preview by Reference

YYYY-ABCDEF

Preview

Save

Cancel

Image: Enter a reference ID into the Preview text box.

25Live gives you the opportunity to preview your template using an internal Event Reference ID, which is in the format of:

<i>Four-digit year</i>	<i>Dash</i>	<i>Six uppercase letters</i>
2024	-	AAGXQN

To: j.smith@yourschool.edu
CC: s.johnson@yourschool.edu
BCC:
Reports: Confirmation
Subject: Your event has been confirmed (2022-AAGXQN)
Body:
Your event New Faculty Welcome Lunch has been confirmed.

Organization Name: Faculty Senate
Event Time: 11/14/22, 12:00 PM - 11/14/22, 1:30 PM
Event Location:

Name	Formal Name
BJF 100	Bryan J. Fitterer Culinary Building - Room 100 - Cafeteria

Image: Example of an Event Save Email template preview.

When you preview a template, 25Live displays the email preview without checking any event criteria.

10. Save the Template

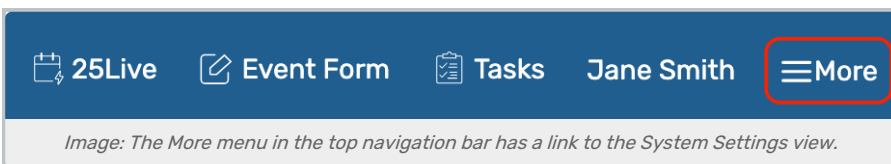
Use the **Save Template** button to save your completed Event Save Email Template.

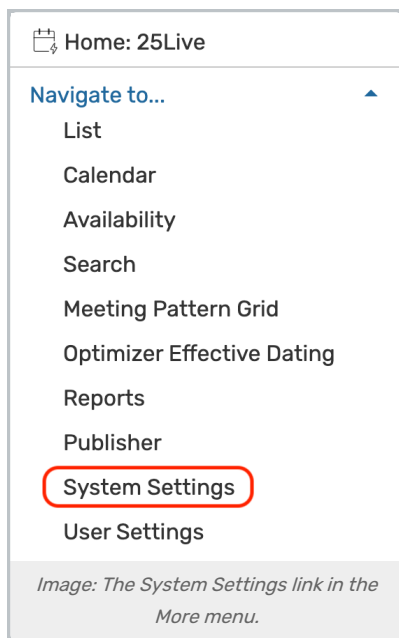
If you are creating a template from within creating or editing a scenario, saving will return you to the scenario settings where you can add or create as many templates as you need.

How To Edit or Delete Event Email Templates

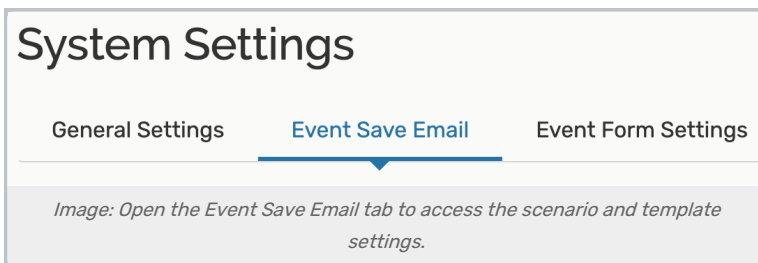
1. Go to the System Settings View, and Access the Event Save Email Section

The **System Settings** section is accessible from the **More** menu in [the top navigation bar](#).

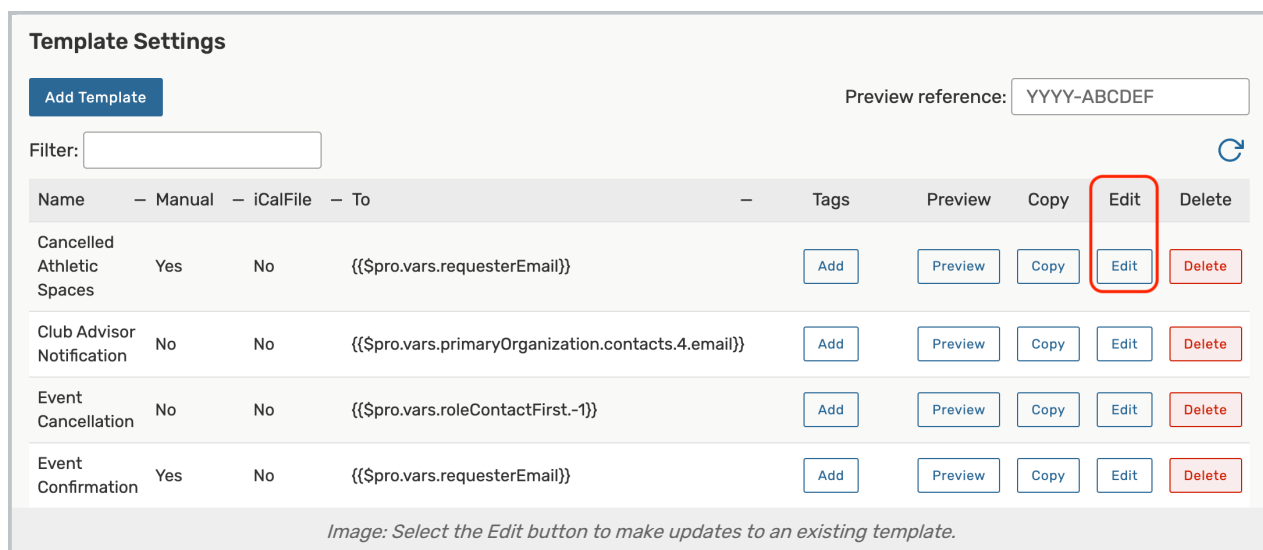




Tap or click on **Event Save Email** to reveal the section.



2. Access Template Editing



There is an **Edit** button for each template. Just as when creating a template, you can preview your changes using a reference number, as described in step 8 above.

3. Choose a Template to Edit or Delete

If editing, change any fields you wish, then **Save**. Saving will refresh the screen.

If deleting, use the **Delete** button, then select **Yes** to confirm.

Template Settings

Add Template

Preview reference: YYYY-ABCDEF

Filter:

Name	Manual	iCalFile	To	Tags	Preview	Copy	Edit	Delete
Cancelled Athletic Spaces	Yes	No	{{ \$pro.vars.requesterEmail }}	<div>Add</div>	<div>Preview</div>	<div>Copy</div>	<div>Edit</div>	<div>Delete</div>
Club Advisor Notification	No	No	{{ \$pro.vars.primaryOrganization.contacts.4.email }}	<div>Add</div>	<div>Preview</div>	<div>Copy</div>	<div>Edit</div>	<div>Delete</div>
Event Cancellation	No	No	{{ \$pro.vars.roleContactFirst.-1 }}	<div>Add</div>	<div>Preview</div>	<div>Copy</div>	<div>Edit</div>	<div>Delete</div>
Event Confirmation	Yes	No	{{ \$pro.vars.requesterEmail }}	<div>Add</div>	<div>Preview</div>	<div>Copy</div>	<div>Edit</div>	<div>Delete</div>

Image: Select the Delete button to permanently remove an existing template.



Note: Active Scenarios

If the scenario any template is attached to is marked as **Active**, it will begin to trigger emails as soon as you save your template.