

Inline Editing Contact Details

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Activating Edit Mode

Search: Go to Search | Recently Viewed | Help

Smith, Jane ☆

Details | List | Calendar | Audit Trail

Edit Mode: Off ☒ On

General

Contact Name	Smith, Jane	
First Name	Jane	
Middle Name		
Last Name	Smith	
Prefix		
Suffix		
Title		
Internal ID		

User Account

Username	Jane.Smith
Active User?	<input checked="" type="radio"/> Active <input type="radio"/> Inactive

Additional Roles

Show Expired ☒

Delete	Contact Name	Expiration Date
	25Live Publisher	Wed Dec 31 2025
	Public Search User	Wed Dec 31 2025

Add New Contact

Work Contact Details

Work Email	jane.smith@myschool.edu	
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Home Contact Details

Image: Details views feature a toggle to allow inline editing.

Use the **Edit Mode** toggle at the top of any event, location, resource, or organization details view to turn on or off the ability to edit fields inline. When the toggle is on, edit icons appear next to many fields. Turn the toggle off to protect fields from accidental edits.

Guidelines For Adding Contacts

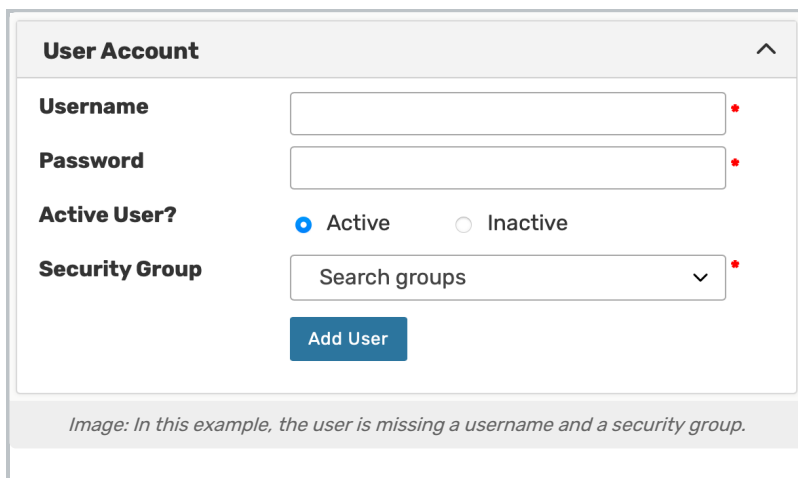
- Only Last Name and Work Email Address are required to add a contact
- If the contact you're adding is a Series25 user, you also should add a security group
- Associate one or more organizations with the contact as needed in the details



Warning

Editing the work email address of a 25Live user contact may break the connection between the user and your SSO. If you're unsure, check with your 25Live System Administrator.

Adding a Username, Password, and Security Group



User Account

Username *

Password *

Active User? ☒ Active ☐ Inactive

Security Group *

Add User

Image: In this example, the user is missing a username and a security group.

If you have a user in your Series25 database that is **missing** a username and/or security group setting, you can see those fields missing when viewing their contact details.

Administrators with permission can add a **Username**, **Password**, and **Security Group** for a user missing those fields. Use the **Add User** button to save changes.

For directions on editing your own password, please see [Working with User Settings](#)

For directions on updating an existing password on behalf of another user, please see [Editing a Password in Group Administration](#)



Tip

Contacts can also be created in Series25 Group Administration when [Adding Users to Security Groups or Creating Contacts](#).

Changing a User's Security Group

Find the **User Account** section, and use the **Security Group** search-select field to change a user's security group.



Warning: Be Very Careful Changing a User's Security Group

Changing a security group for a user has many consequences and could interrupt workflows. Only change the security group after double checking everything the user does in your Series25 applications.

User Account

Username

smithj

Active User?

☒ Active
 ☐ Inactive

Security Group

Administrator - System (-1)

▼

Image: The User Account section has fields for changing a user's security group as well as activating or inactivating a user.

Activating and Inactivating a User

In the **User Account** section, you can use the **Active User?** field to mark a user as active or inactive.

Updating a Contact's Additional Roles

These configurations control whether this user can [masquerade](#) as other users.

Additional Roles

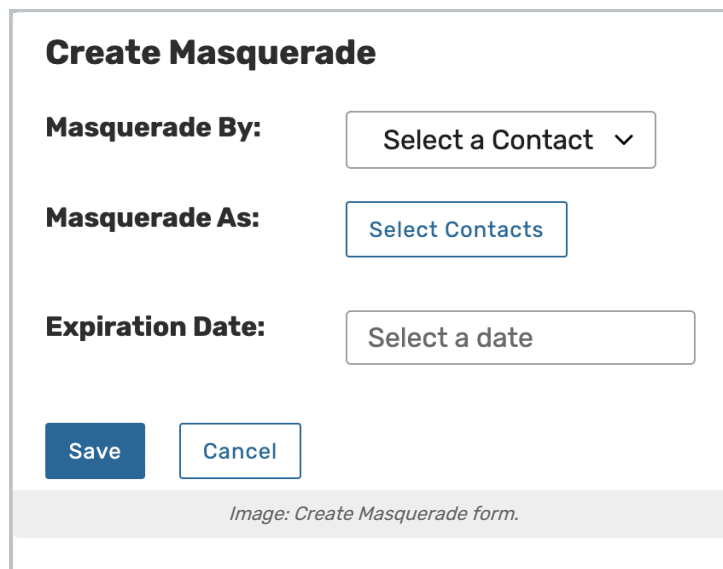
Show Expired ☒

Delete	Contact Name	Expiration Date
×	25Live Publisher	Wed Dec 31 2025
×	Public Search User	Wed Dec 31 2025

Add New Contact

Image: Additional Roles panel on the Contact Details page.

- Use the **Show Expired** checkbox to display past masquerade mapping for this user.
- Tap the date on a row to update it to a new expiration date.
- Use the **x** to delete a row.
- Select **Add New Contact** to select additional users for this contact to masquerade as.
 - Fill out the form and **Save**.



Create Masquerade

Masquerade By:

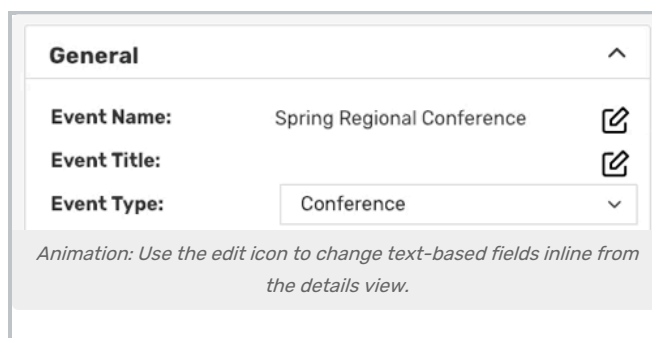
Masquerade As:

Expiration Date:

Image: Create Masquerade form.

Other Types of Fields

Text-Based Fields



General ^

Event Name: Spring Regional Conference

Event Title:

Event Type:

Animation: Use the edit icon to change text-based fields inline from the details view.

For text-based fields, use the edit icon to enter the editing mode, make changes, then use the **Save** button. The **Cancel** button is available to exit editing mode without saving changes.

Administrative Address

123 Street Ave.
Portland , OR 97205 U.S.
p: 555-555-1111

Billing Address

Street Address

805 SW Broadway, Suite 100

City

Portland

State / Province

OR

Zip

97205

Country

U.S.

Phone

503-555-2222

Fax

503-555-3333

Save

Cancel

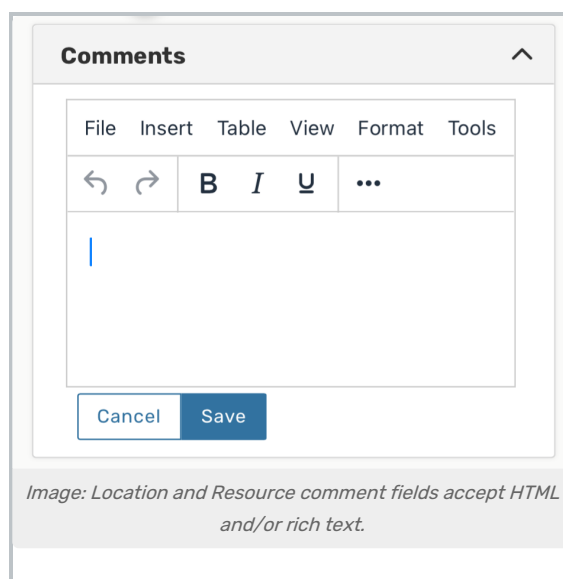
Image: Multi-line text fields can also be changed using the edit icon.

The same edit icon  appears next to multi-line fields, like addresses, to allow editing.

Editing Large Text Fields

A screenshot of a web form showing a 'Comments:' label next to a large, empty rectangular text input field. Below the input field are two buttons: 'Cancel' and 'Save'. At the bottom of the form, there is a greyed-out area with the text: 'Image: Plain text comment fields are found in event details.'

Some comment fields are large text fields and can only display plain text, such as those used in event details.

A screenshot of a web form showing a 'Comments' header with an upward arrow. Below the header is a rich text editor with a menu bar containing 'File', 'Insert', 'Table', 'View', 'Format', and 'Tools'. The menu bar has sub-menus for undo/redo, bold, italic, underline, and a more options menu. Below the menu is a large text input area with a blue cursor. At the bottom are 'Cancel' and 'Save' buttons. Below the form, there is a greyed-out area with the text: 'Image: Location and Resource comment fields accept HTML and/or rich text.'

Some comment fields use rich text editors for inline editing that can render styles, images, and some HTML (such as links or embedded elements). Examples of uses include adding emphasis to text, images of resources, or 360-degree views of locations. Look for the rich text menus and controls to tell if the field accepts styled elements.

Dropdown Menu Fields

To edit any fields in Details views displayed as a drop-down menu, simply tap or click on the menu then scroll to select a choice. Some fields, such as **Event Type**, contact roles such as the **Scheduler** and **Requestor**, and **Organization** use a search field to make selecting your choice easier.

The screenshot shows a form with two dropdown search fields. The first field, labeled "Scheduler:", has "Mozart, Wolfgang" selected with a star icon. The second field, labeled "Requestor:", has "Dickinson, Emily" selected with a star icon. Below the "Requestor:" field is a search bar with the placeholder text "Search contacts". Below the search bar are two search results: "Dickinson, Emily (dickinson@yourschool.edu)" with a star icon, and "Mozart, Wolfgang (mozart@yourschool.edu)" with a star icon. At the bottom of the form, there is a note: "Image: Some fields use a dropdown search field to allow inline editing."

Changes will be saved immediately upon closing the menu.

Multiple Selections (such as Categories)

Use the **Add** link in the Event Categories section to reveal a category list with checkboxes. Select as many as are needed then use the **Done** button to save your changes.

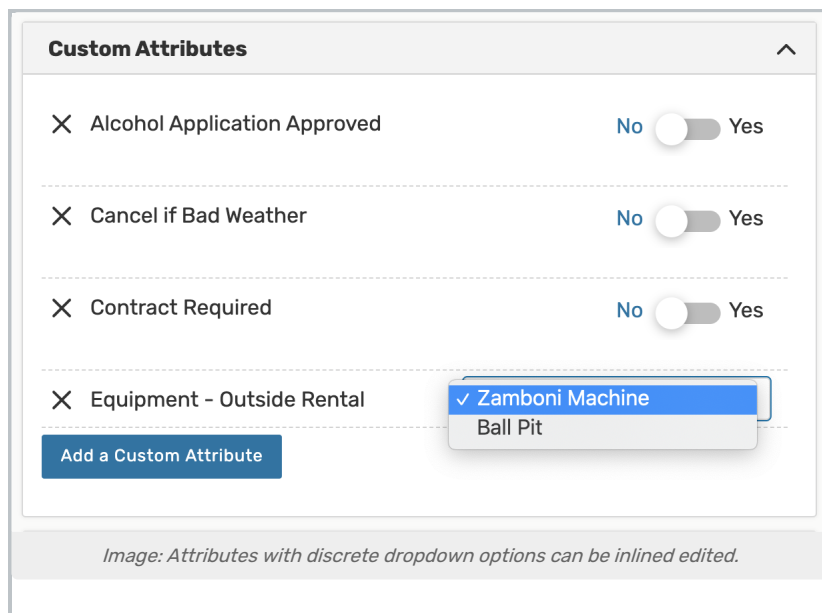
Toggled, Date-Based, Text, and Select Fields

Many fields have toggle or date controls, such as Custom Attributes.

The screenshot shows a form with several fields. The first two fields, "Paid in Full" and "Payment Received", each have a "No" label, a sliding toggle switch, and a "Yes" label. The third field, "Rain Location", has a "Search spaces" dropdown menu. The fourth field, "Registration Form", has a text input field and a link icon. The fifth field, "Special Needs", has a text input field and a dropdown arrow. The sixth field, "Web Site", has a text input field and a link icon. The seventh field, "Will alcohol be served?", has a "No" label, a sliding toggle switch, and a "Yes" label. The eighth field, "Will outside food be brought in?", has a "No" label, a sliding toggle switch, and a "Yes" label. At the bottom of the form, there is a note: "Animation: Use the Yes/No toggles to edit values, and use the date picker to change dates."

Fields with a yes/no choice can be set on or off using the sliding toggle. When adding a new custom attribute, you must set the toggle before the attribute is saved as added. Simply tap or click on a date to select a new date. Type values into text fields. Select from dropdown lists. Changes will be saved immediately.

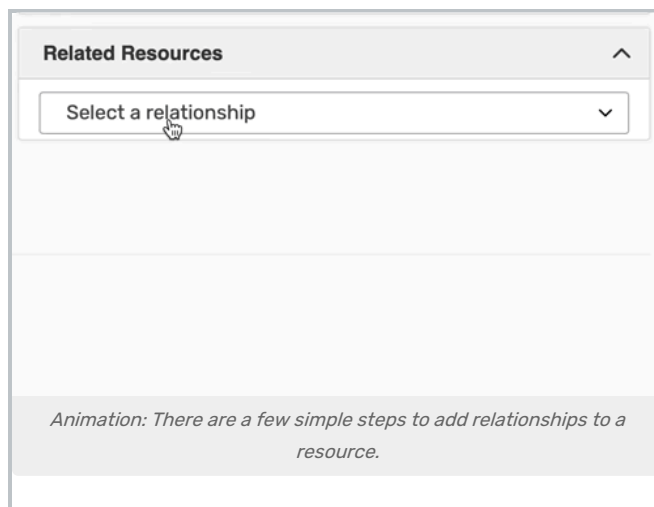
Custom Attribute with Discrete Dropdown Options



The screenshot shows a 'Custom Attributes' panel with a list of attributes. Each attribute has a toggle switch for 'No' and 'Yes'. The 'Equipment - Outside Rental' attribute has a dropdown menu open, showing 'Zamboni Machine' (selected) and 'Ball Pit'. Below the list is an 'Add a Custom Attribute' button. At the bottom, a note states: 'Image: Attributes with discrete dropdown options can be inlined edited.'

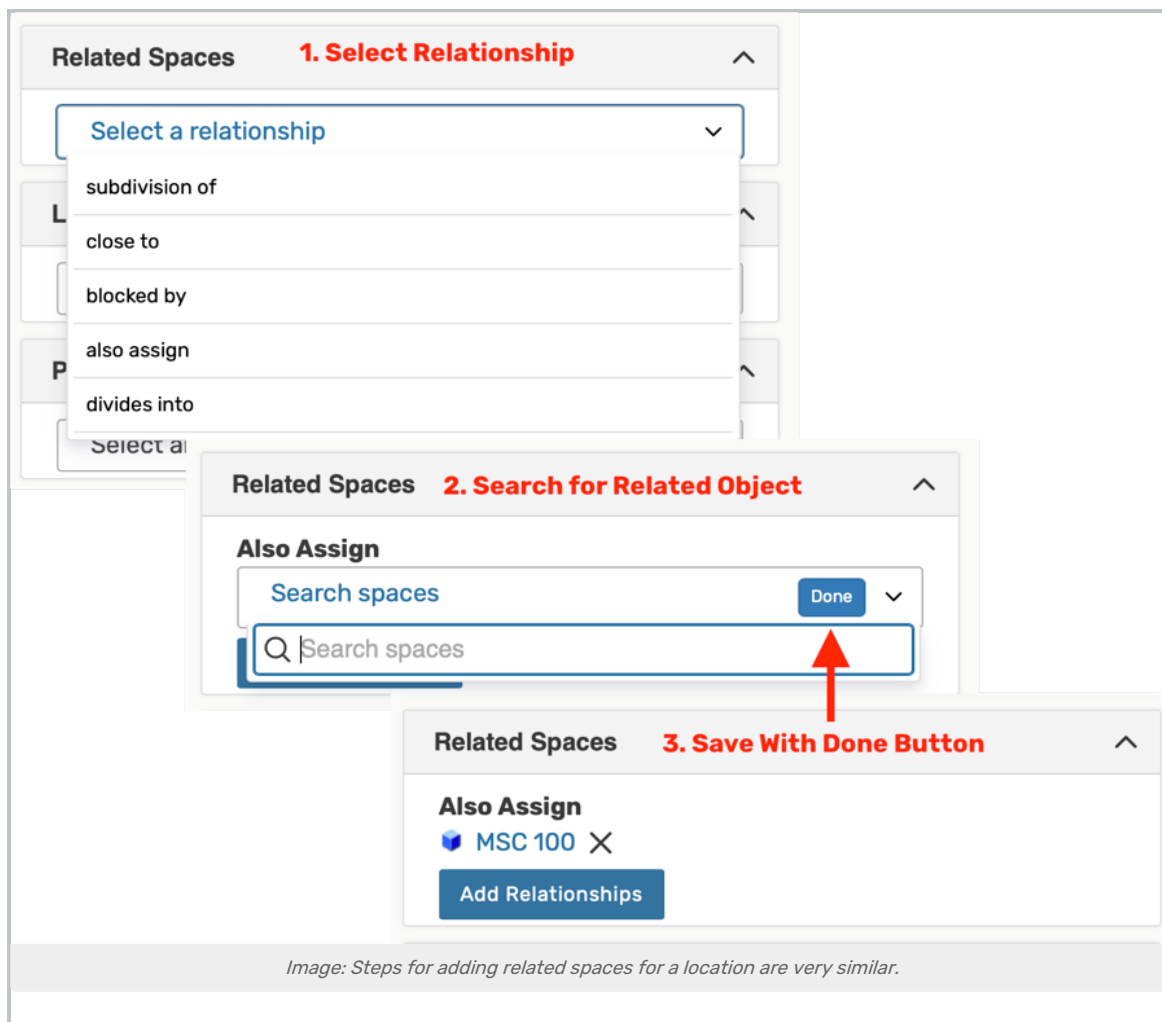
Administrators can [define discrete dropdown](#) options for user-defined event custom attributes of the text type in System Settings. To change options, choose from the list. Changes will be saved immediately.

Relationship Fields



The screenshot shows a 'Related Resources' panel with a dropdown menu labeled 'Select a relationship'. Below the dropdown is a large empty space. At the bottom, a note states: 'Animation: There are a few simple steps to add relationships to a resource.'

Locations and resources can have defined relationships to other locations and resources, which can be added through inline editing in details views.



Use the **Add Relationship** button to start. Select the relationship type, then search to find the related item. Save your choices with the **Done** button. To remove a relationship, use the **X** next to the related object.

Special Field Types for Contacts

Associated Organizations

Associated Organizations

X

MUSIC, DEPT OF

Choose a Role

Add Organization:

Search organizations

Q Search organizations

ALTERNATIVE FILM CLUB

ENGLISH, DEPT OF

STUDENT AFFAIRS

Image: You can add and remove organizations associated with a contact using inline editing.

Use the **Add Organization** dropdown to search for and select associated organizations.

Once selected, use the **Choose a Role** dropdown menu to search for and select a contact role for the organization.

To remove an organization, use the "X" icon.