

Inline Editing Contact Details

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Activating Edit Mode

Go to SearchRecently ViewedHelp

Smith, Jane

DetailsListCalendarAudit Trail

More Actions

Edit ModeOffOn

Help

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?

Active

Inactive

Additional Roles

Show Expired

☒

Delete

Contact Name

Expiration Date

X

25Live Publisher

Wed Dec 31 2025

X

Public Search User

Wed Dec 31 2025

Add New Contact

Work Contact Details

Work Email

jane.smith@myschool.edu

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

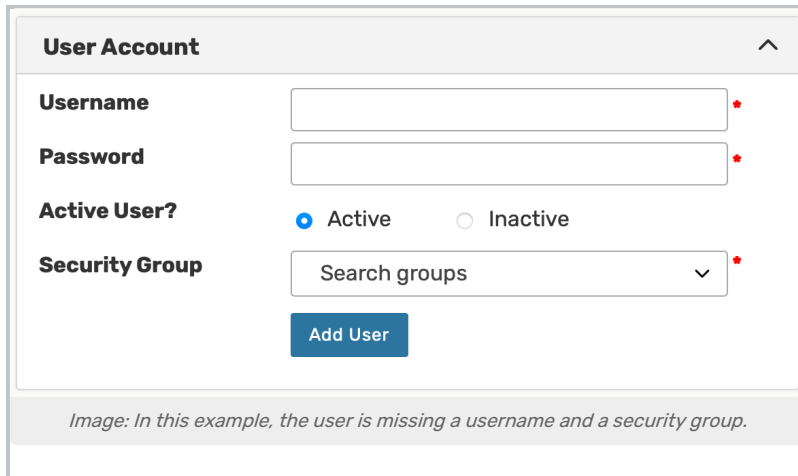
- Only Last Name and Work Email Address are required to add a contact
- If the contact you’re adding is a Series25 user, you also should add a security group
- Associate one or more organizations with the contact as needed in the details



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: Other Methods and Supported Characters

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

The at (@) symbol is allowed in usernames. The following characters are unsupported:

- !
- <
- >
- %
- ~
- ^

Changing a User's Username, Active Status, or Security Group

Find the **User Account** section to update a username, active status, or security group.

- Edit a username: Use the edit icon beside the user's current username and enter a new username. Then, press **Save**.
- Set user to active or inactive: Toggle the **Active User?** field to mark a user as active or inactive.
- Use the **Security Group** dropdown to update a user's security group. This task can also be completed in [Group Administration](#).



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

jane.smith

The following characters are unsupported for usernames: ! < > % ~ @ ^

Active User?

Active

Inactive

Security Group

Administrator - Functional

Image: The User Account section has fields for changing a user's username and security group, as well as the option to toggle the user between active and inactive.

Updating a Contact's Additional Roles

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

Additional Roles

Show Expired

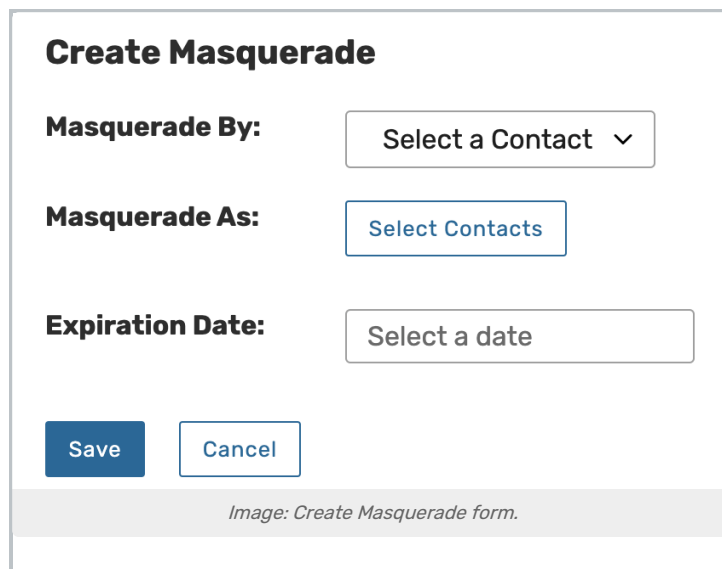
☒

Delete	Contact Name	Expiration Date
X	25Live Publisher	Wed Dec 31 2025
X	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:

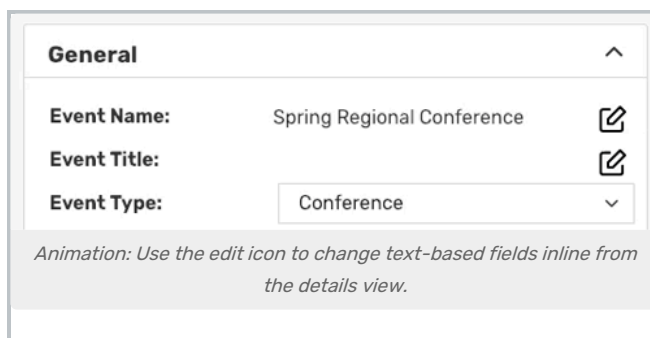
Masquerade As:

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

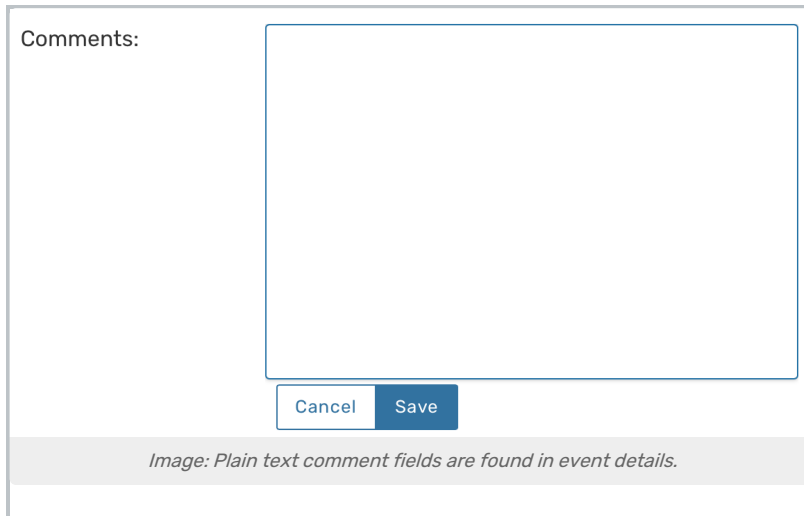
Save

Cancel

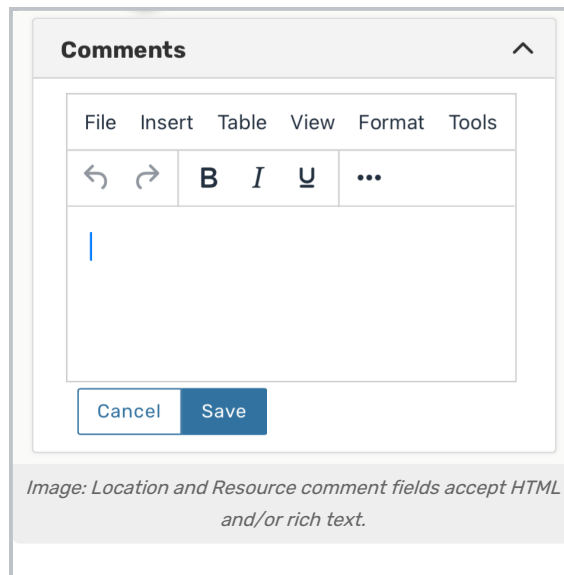
Image: Multi-line text fields can also be changed using the edit icon.

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

Editing Large Text Fields

A screenshot of a web interface showing a comment field. The label "Comments:" is on the left. To its right is a large, empty rectangular text box. Below the text box are two buttons: "Cancel" and "Save". At the bottom of the interface, there is a grey bar 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 interface showing a rich text comment field. The title "Comments" is at the top with an upward arrow icon. Below the title is a toolbar with tabs: "File", "Insert", "Table", "View", "Format", and "Tools". Under the "Format" tab, there are icons for undo, redo, bold (B), italic (I), underline (U), and a more options menu (three dots). Below the toolbar is a large text area with a blue cursor. At the bottom are "Cancel" and "Save" buttons. A grey bar at the bottom contains 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.

Scheduler:

Mozart, Wolfgang ☆

Requestor:

Dickinson, Emily ☆

Q Search contacts

Dickinson, Emily (dickinson@yourschool.edu) ☆

Mozart, Wolfgang (mozart@yourschool.edu) ☆

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.

✕ Paid in Full

No ☒ Yes

✕ Payment Received

No ☒ Yes

✕ Rain Location

Search spaces

✕ Registration Form

✕ Special Needs

✕ Web Site

✕ Will alcohol be served?

No ☒ Yes

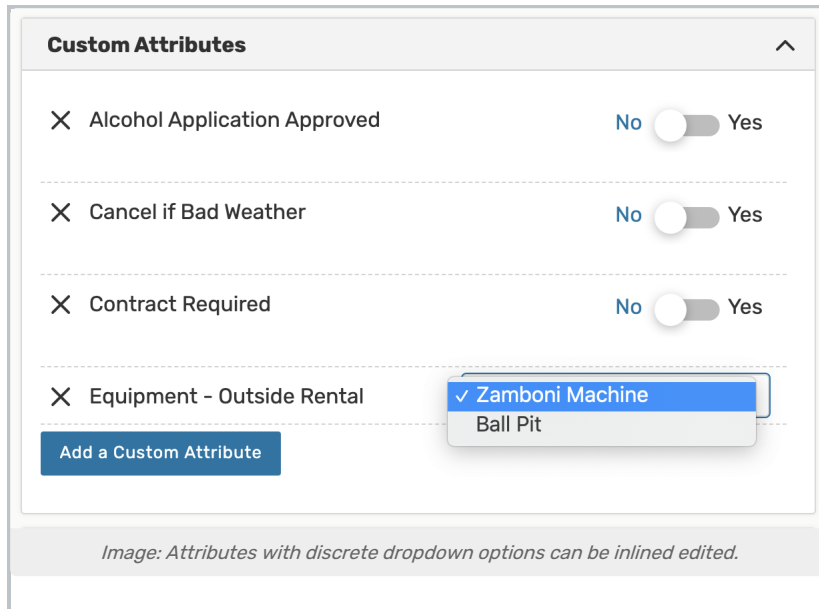
✕ Will outside food be brought in?

No ☒ Yes

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



Custom Attributes

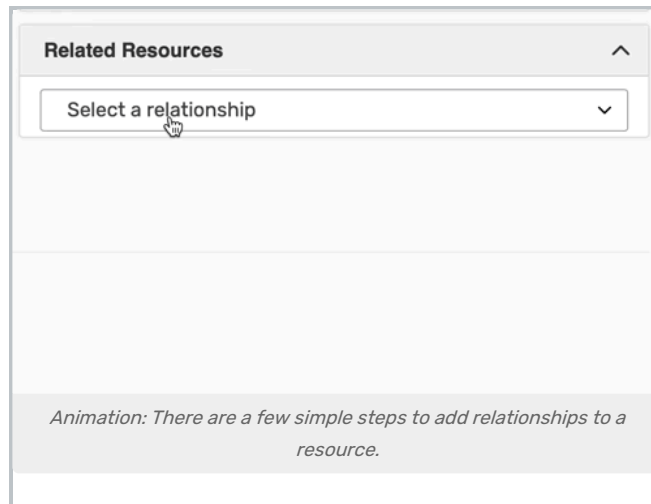
- ✕ Alcohol Application Approved No ☐ Yes
- ✕ Cancel if Bad Weather No ☐ Yes
- ✕ Contract Required No ☐ Yes
- ✕ Equipment - Outside Rental ✓ Zamboni Machine
Ball Pit

[Add a Custom Attribute](#)

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

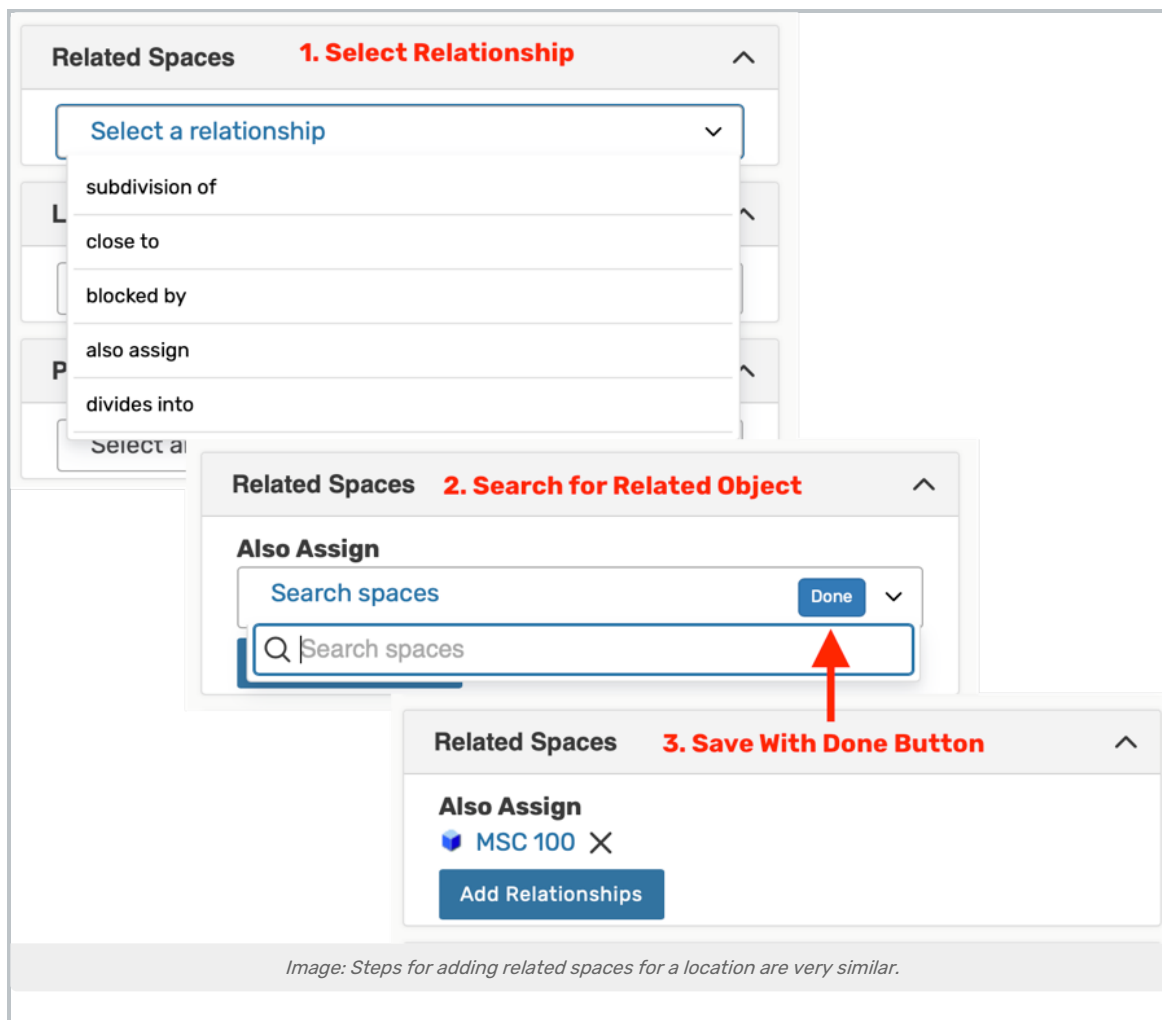


Related Resources

Select a relationship

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

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.