

# Creating, Copying, and Editing To Do 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.

To Do templates are used by 25Live administrators in email [scenarios](#) to automatically create to do tasks using the rules within the scenario.

## How to Create To Do 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](#).



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Use the menu link to go to the **System Settings** view, then tap or click on **Event Save Email** to reveal the section.

## System Settings

General Settings

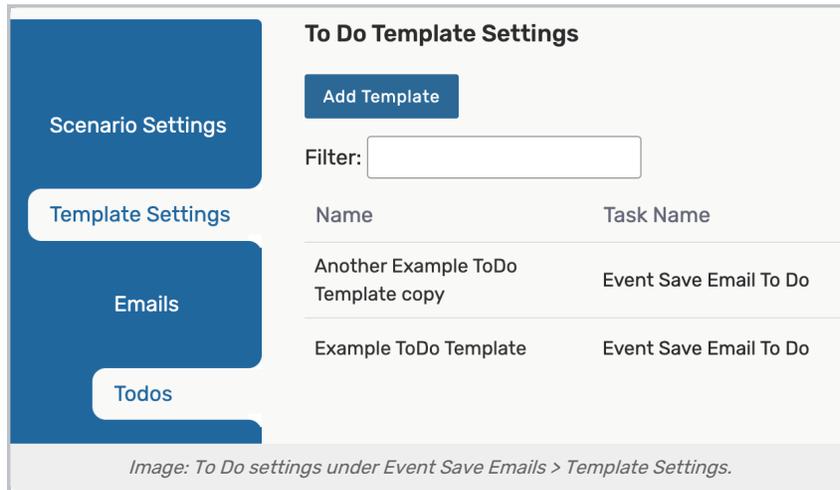
Event Save Email

Event Form Settings

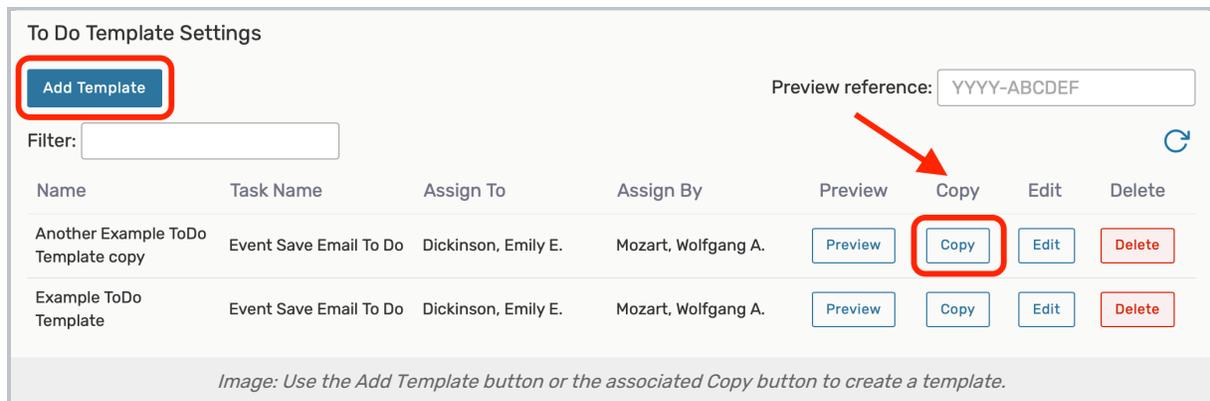
*Image: Tap or click on Event Save Email to access the scenario and template settings.*

## 2. Access Template Creation

Use the **To Do Template Settings** heading link in the Event Save Email section.

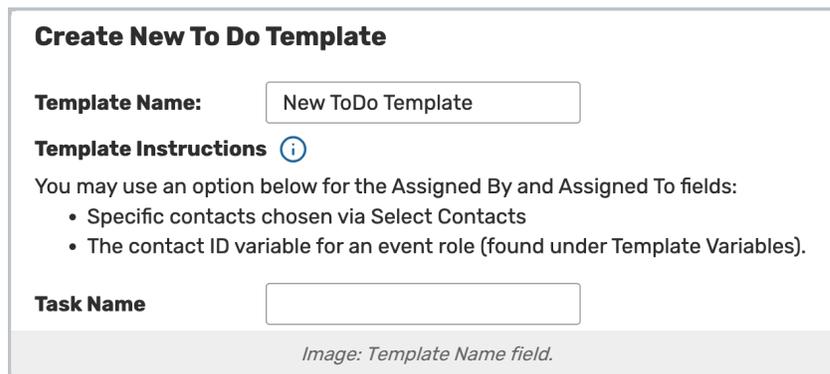


## 3. Choose to Create a new Template or Copy an Existing Template



If you'd like to use one of your existing to do 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, use the **Add Template** button to start from scratch.

## 4. Complete or Edit the Initial Setting and Names



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

Type or edit the **Task Name** that will display to other users.



**Tip**

The Task Name field accepts variables under 40 characters in length.

## 5. Add Task Assign Contacts and a Due Date

The screenshot shows a form with three rows. The first row is labeled 'Assigned By:' and has a text input field followed by a 'Select Contact' button. The second row is labeled 'Assigned To:' and has a text input field followed by a 'Select Contact' button. The third row is labeled 'Due Date:' and has a text input field containing '0' with a dropdown arrow on the right, followed by the text '(+/- days from the first occurrence)'. Below the form is a caption: 'Image: The assign fields and due date are next to complete.'

Complete the two fields for assigning the automatically created to do task:

- **Assigned By**
- **Assigned To**

Use the **Select Contacts** button to search and select specific contacts. You may also use the section below to generate template variables to copy the contact ID variable for an event role.

In the **Due Date** field, type the number of days before or after the event's first occurrence that the automatically created to do task should be due. Use the +/- buttons to aid your entry. Negative numbers will create a due date before the first occurrence date.

## 6. Add To Do Task Comments

The screenshot shows a form with a 'Comment:' label above a text area. The text area contains the text 'Please check on the locations and resources for this event to be sure they are approved.' followed by a template variable '{{ \$pro.vars.locationsStringCSV }},'. Below the text area is a dropdown menu labeled 'Template Variables' with a downward arrow. Below the form is a caption: 'Image: The Report field in the Event Email Template.'

Use the **Comment** space to type in to do task comments that will be viewable to anyone with permission to view this task. You may use template variables in the text. Open the **Template Variables** section below the text area to choose and copy template variables to add.



**Tip: 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.

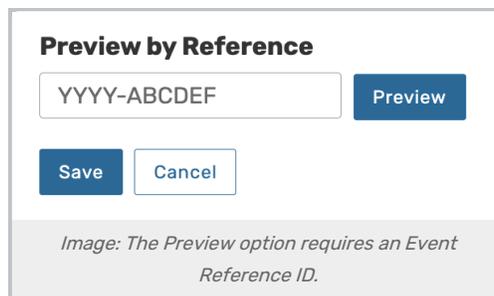
[View List of Template Variable Reference and Examples](#)

**However, be aware that not all template variables can be used in To Do template comments.** So, using the Template Variables section in your current view is the best way to ensure you're adding variables that will work.

## 9. Optionally Use the Advanced Code View or Preview

Expert users can use the **Code View** button under the **Advanced** heading to view the source code for this template.

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.



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

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

## 10. Save the Template



### Warning: Check Your Event Form Configuration Settings

To Do tasks setup in an Event Save Scenario will not be generated for any events where a user has chosen to Silent Save the event. This can happen if Allow Silent Save has been toggled to Yes in the [event form configurations](#).

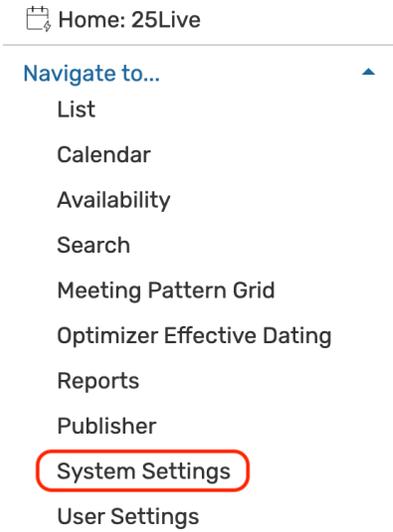
Use the **Save** button to save your completed To Do Template.

See [Event Save Email: Creating, Copying, and Editing Scenarios](#) for information on using your To Do Template.

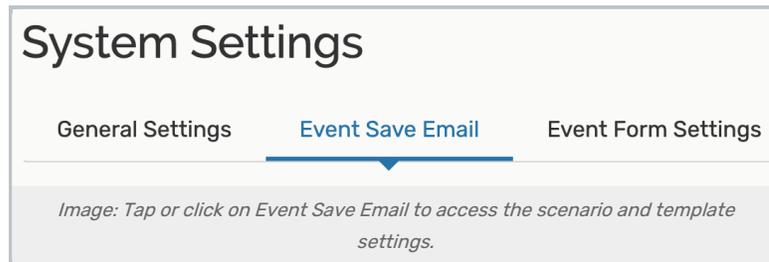
## How To Delete or Edit To Do Templates

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

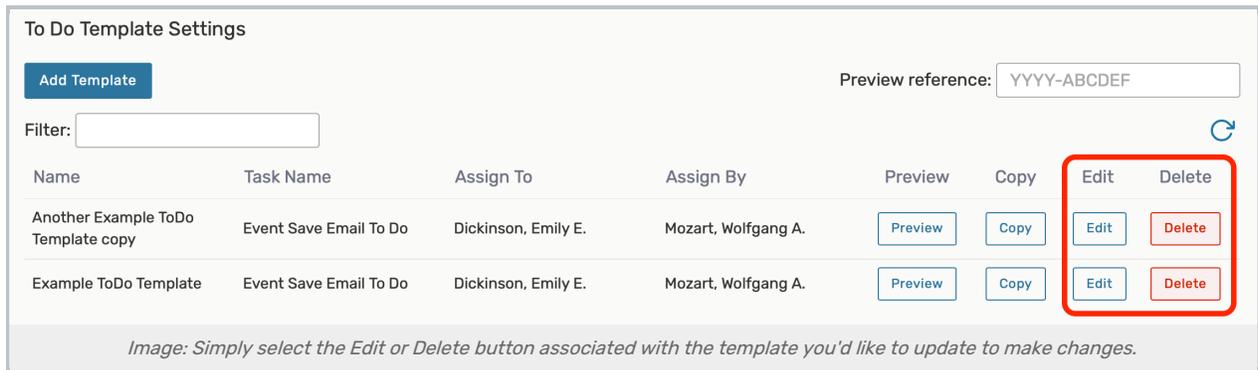
The **System Settings** section is accessible from the **More** menu in [the top navigation bar](#).



Use the menu link to go to the **System Settings** view, then tap or click on **Event Save Email** to reveal the section. Then access the **To Do Template Settings** section.



## 2. Choose a Template to Edit or Delete



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 above.

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.



**Note: Active Scenarios**

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