Creating and Editing Email Templates

> **⚠ Security Note: These Settings Require Administrative Access**
>
> To access the System Settings views, your 25Live user must have administrative security permissions (be in the -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 allows 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

Image: The More menu in the top navigation bar has a link to the System Settings view.

After logging into 25Live as an administrator or user with permissions to access System Settings (-1), open the **More** menu in the top navigation bar.
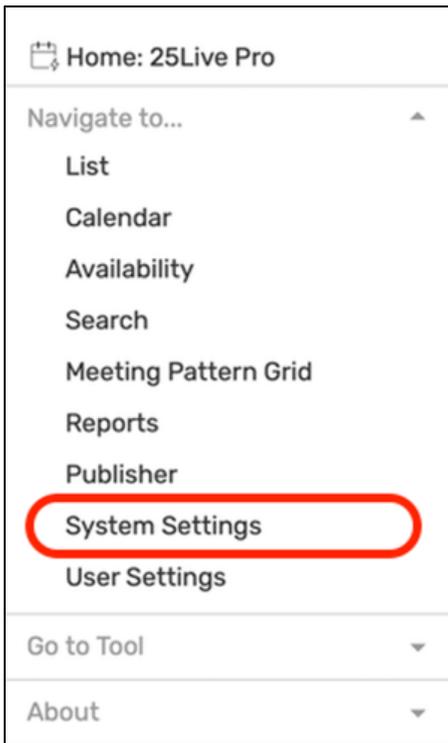

Image: The System Settings link is in the More menu.

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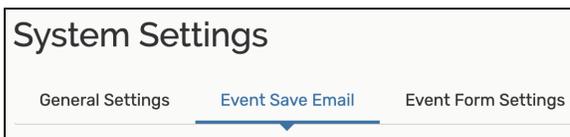

Image: Tap or click on Event Save Email to access the scenario and template settings.

2. Access Template Creation

Use the **Create Template** heading in the Event Save Email section.

25Live Pro Help

In This Topic

- How to Create Event Email Templates
- How To Edit or Delete Event Email Templates

Related Topics

- Creating and Editing Scenarios
- Template Variable Reference with Examples
- Using Manual Email Templates
- Viewing Event Details
- Emailing Event Details
- Finding Object IDs in 25Live
- Replacing Configuration Utility Emails With Event Save Emails *(Series25 Customer Resources login required)*

You can also access the button for creating new templates from within the views for creating or editing scenarios.

Image: You can create a template from within creating or editing a scenario.

3. Complete 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.
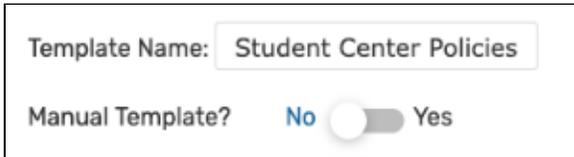

Image: The initial field and setting help identify your email template for use.

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.

4. Add Email Recipient Fields

Image: The first set of fields are similar to standard email fields.

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 (*uncommon)*

✅

5. Optionally Attach Reports
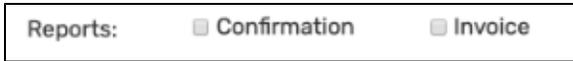
Reports: ☐ Confirmation   ☐ Invoice

Image: The Report field in the Event Email Template.

The **Report** field features convenient checkboxes to choose between available report attachments:

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

6. Add an Email Subject

Subject: Your Event Was Requeste

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

7. Add Content for the Email Body

Body:

File Insert Table View Format Tools

↶ ↷ **B** *I* U A ⌄ ✎ ⌄ System Font ⌄ 12pt ⌄ 🔗

Your event was requested successfully.

Event Info: {{$pro.vars.eventName}}, {{$pro.vars.dates.startDateTimeString}}, {{$pro.vars.locationsString}}

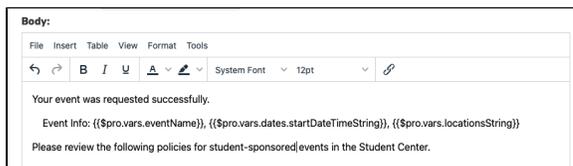Please review the following policies for student-sponsored|events in the Student Center.

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

The body field accepts rich text editing and provides you with editing and styling controls. 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 Start Date and Time: {{$pro.vars.dates.startDateTimeString}}`

- `Event Location: {{$pro.vars.locationsString}}`

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).

ⓘ

> (i) **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.

8. Optionally Preview Your Template by Reference

Preview by Reference:	2019-AAZHZA	**Preview**

Image: The Preview option requires an Event Reference ID.

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

Four-digit year	Dash	Six uppercase letters
2021	-	AAZHZA

To: smith.john@school.edu
CC: scheduler.jane@school.edu
BCC:
Reports: confirmation
Subject: Your Event Was Requested Successfully

Body:
Your event was requested successfully.
    Event Info: ENG 103 Study Session, 2019-12-18 12:00 PM, Macadam Student Center – Meeting Room 102

Please review the following policies for student sponsored events in the Student Center.

Edit Template

Image: Example of an Event Save Email template preview.

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

9. Save the Template

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

If you were 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.

> ✓ **Best Practices: Converting Old Configuration Utility Emails**
>
> In our Customer Resources knowledgebase, we have outlined the best practices for Replacing the Emails from the Configuration Utility *(Series25 Customer Resources login required)*.

How To Edit or Delete Event Email Templates

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

Image: The More menu in the top navigation bar has a link to the System Settings view.

After logging into 25Live Pro as an administrator or user with permissions to access System Settings (-1), open the **More** menu in the top navigation bar.
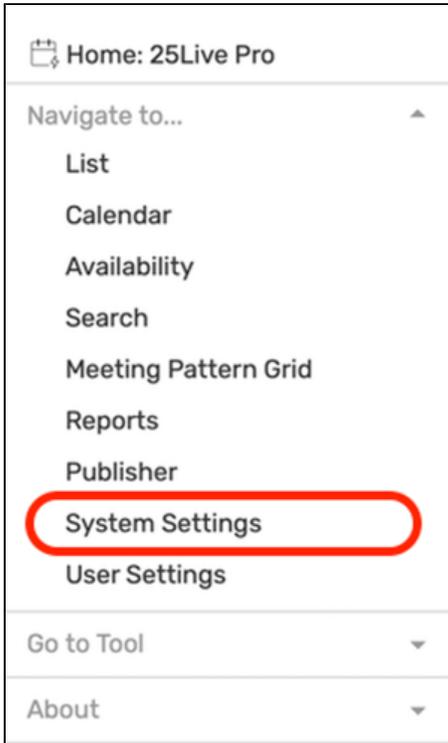

Image: The System Settings link is in the More menu.

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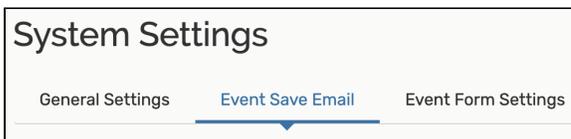

Image: Tap or click on Event Save Email to access the scenario and template settings.
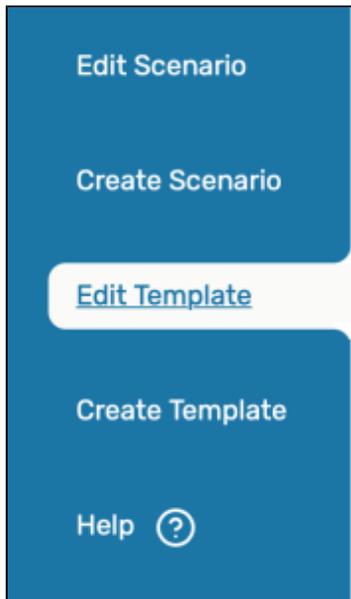
2. Access Template Editing

Image: The direct link to the Edit Template is within the Event Save Email section.

There is a direct **Edit Template** link just within the Event Save Email section.

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

Use the dropdown menu to choose an existing template from your library. Your previously created templates are in the dropdown menu displayed in alphabetical order. Specific templates may be restricted by security group in the Series25 Group Administration tool.

If editing, change and fields you wish, then **Save Template**. Saving will refresh the screen. You may choose to edit another template by using the **Edit Template** dropdown menu.

If deleting, use the **Delete Template** button.

> ⓘ **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.