



# Brandeis

## How to Email and Print an Invoice/Confirmation Report in 25Live Pro

There are two ways to **email** an invoice and/or confirmation report in 25Live Pro:

- [While still in the event wizard, after just having creating the event](#)
- [In the event details after searching for and pulling up an existing event reservation](#)

There is one common way to **print** an invoice and/or confirmation report in 25Live Pro:

- [In the event details after searching for and pulling up an existing event reservation](#)



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## EMAIL METHOD 1:

After you have created your event reservation and are still in the event wizard, you are taken to a screen with the green banner that says “The event has been saved successfully”. Click on “Email” to email the event materials.

The screenshot displays a web interface with a green banner at the top stating "This event has been successfully saved." with a "Close" button. Below the banner is a "What's Next?" section with four buttons: "View Details", "Edit", "Copy", and "Email", each with a corresponding description. The "Event Tasks" section below shows "3 Active Notification Tasks".

Go to Search   Recently Viewed   Help

**This event has been successfully saved.** Close

**What's Next?**

- View Details** View the Event Details page for this event. The full range of actions are available to you from there.
- Edit** Need to make some more edits to this event? Click this button to start editing.
- Copy** Create a copy of this event with many event details duplicated. Go through each field of the new event to verify the details you want to retain and resolve any possible conflicts.
- Email** Email the details of this event to its stakeholders or anyone else.

**Event Tasks**

3 Active Notification Tasks



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In the pop-out window for the email settings:

Use the **left-hand side** to select email recipients from the list and indicate which documents you'd like to send them

- This list includes the requestor and scheduler for the event, the account user (self) as well as anyone with assigned tasks or notifications related to this event.
- You can also manually upload any additional documents you'd like to send.

**Email Event Details** [X]

Link to: Pro | Original 2SLive | Scheduling

Related Recipients	TO	CC	BCC
Self (Atkinson, Lindsay)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Requestor (Atkinson, Lindsay)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Scheduler (Atkinson, Lindsay)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Anyone with Assignment Tasks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Anyone with Notification Tasks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Event Owner	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Attach:  Event Summary (Full)  
 Custom Invoice Per Event  
 Custom Conf Detail Per Event  
 iCal File

Choose File No file chosen

Additional Recipients

TO:

CC:

BCC:

Separate multiple email addresses with commas. To choose from a list, click To, CC or BCC.

Subject: Test (2019-AARRPR)

Message Body  Check the checkbox to include Event Details. Add a custom message if desired.

Include event details in body of message

Cancel Send



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Use the **right-hand side** to manually add additional recipients as needed who should receive this email. Alternately, clicking on “To”, “CC” or “BCC” will give you the option of selecting from a list of users with accounts in 25Live Pro.

Note: Multiple email addresses should be separated by commas.

**Email Event Details** [X]

Link to: Pro Original 25Live Scheduling

**Related Recipients**

	TO	CC	BCC
<b>Self</b> (Atkinson, Lindsay)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Requestor</b> (Atkinson, Lindsay)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Scheduler</b> (Atkinson, Lindsay)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Anyone with Assignment</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Tasks</b>			
<b>Anyone with Notification</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Tasks</b>			
<b>Event Owner</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Attach:**  Event Summary (Full)  
 Custom Invoice Per Event  
 Custom Conf Detail Per Event  
 iCal File

No file chosen

**Subject:** Test (2019-AARRPR)

**Message Body**  Check the checkbox to include Event Details. Add a custom message if desired.

Include event details in body of message

**Additional Recipients**

TO

CC

BCC

Separate multiple email addresses with commas. To choose from a list, click To, CC or BCC.



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Use the **bottom** to modify the email subject and add text to the email body. Additionally, you can include the event details in the body of your email by checking the checkbox next to “Include event details in body of message”.

Once finished, click “Send” to send your message.

**Email Event Details** [X]

Link to: Pro Original 25Live Scheduling

**Related Recipients**

	TO	CC	BCC
<b>Self</b> (Atkinson, Lindsay)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Requestor</b> (Atkinson, Lindsay)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Scheduler</b> (Atkinson, Lindsay)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Anyone with Assignment Tasks</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Anyone with Notification Tasks</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Event Owner</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Attach:**

- Event Summary (Full)
- Custom Invoice Per Event
- Custom Conf Detail Per Event
- iCal File

Choose File No file chosen

**Additional Recipients**

TO:

CC:

BCC:

Separate multiple email addresses with commas. To choose from a list, click To, CC or BCC.

**Subject:** Test (2019-AARRPR)

**Message Body** Check the checkbox to include Event Details. Add a custom message if desired.

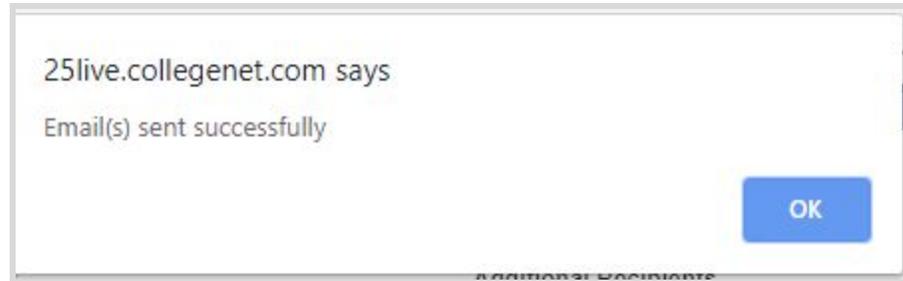
Include event details in body of message

Cancel Send



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A pop-out notification will appear confirming that the email has successfully sent out.





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## EMAIL METHOD 2:

After searching for or navigating into a “starred” or recently viewed event reservation, you will be taken to the Details page to view a high level overview of the event’s details. On the right, click on “More Actions” and select the “Email Event Details” option.

The screenshot displays the 'Details' page for an event. The interface includes a top navigation bar with tabs: Details, Occurrences, Calendar, Schedule, Task List, Pricing, and Audit Trail. The main content area is divided into several sections:

- General:** Event Name: ISSO training; Event Title: ISSO training; Event Type: Workshop; Organization: Library & Technology Services; Scheduler: Hibbler, Laura; Requestor: Hibbler, Laura; Head Count: expected (0) and registered (0); Description: ; Comments: .
- Event Categories:** (Empty)
- Custom Attributes:** (Empty)
- Event Info:** Event Owner: Hibbler, Laura; Creation Date: Fri Nov 30 2018; Reference: 2018-AARCXZ; Cabinet: Special Events FY'18-'19; Folder: LTS.

On the right side, there is an 'Edit Event' button and a 'More Actions' dropdown menu. The 'More Actions' menu is open, showing options: Add to Favorites, Edit Event, Copy Event, Manage Related Events, Manage Bindings, Delete Event, Create To Do Task, **Email Event Details** (highlighted with a red arrow), Send this Event to the 25Live Publisher, and Print a Report for this Event.



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In the pop-out window for the email settings:

Use the **left-hand side** to select email recipients from the list and indicate which documents you'd like to send them

- This list includes the requestor and scheduler for the event, the account user (self) as well as anyone with assigned tasks or notifications related to this event.
- You can also manually upload any additional documents you'd like to send.

**Email Event Details** X

Link to: Pro > Original 25Live > Scheduling

Related Recipients	TO	CC	BCC
<b>Self</b> (Atkinson, Lindsay)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Requestor</b> (Atkinson, Lindsay)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Scheduler</b> (Atkinson, Lindsay)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Anyone with Assignment Tasks</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Anyone with Notification Tasks</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Event Owner</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Attach:**

- Event Summary (Full)
- Custom Invoice Per Event
- Custom Conf Detail Per Event
- iCal File

Choose File No file chosen

**Additional Recipients**

TO:

CC:

BCC:

Separate multiple email addresses with commas. To choose from a list, click To, CC or BCC.

**Subject:** Test (2019-AARRPR)

**Message Body** Check the checkbox to include Event Details. Add a custom message if desired.

Include event details in body of message

Cancel Send



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Use the **right-hand side** to manually add additional recipients as needed who should receive this email. Alternately, clicking on “To”, “CC” or “BCC” will give you the option of selecting from a list of users with accounts in 25Live Pro.

Note: Multiple email addresses should be separated by commas.



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Use the **bottom** to modify the email subject and add text to the email body. Additionally, you can include the event details in the body of your email by checking the checkbox next to “Include event details in body of message”.

Once finished, click “Send” to send your message.

**Email Event Details** [X]

Link to:  Pro  Original 25Live  Scheduling

**Related Recipients**

	TO	CC	BCC
<b>Self</b> (Atkinson, Lindsay)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Requestor</b> (Atkinson, Lindsay)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Scheduler</b> (Atkinson, Lindsay)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Anyone with Assignment</b> Tasks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Anyone with Notification</b> Tasks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Event Owner</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Additional Recipients**

**TO:**

**CC:**

**BCC:**

Separate multiple email addresses with commas. To choose from a list, click To, CC or BCC.

**Attach:**  Event Summary (Full)  
 Custom Invoice Per Event  
 Custom Conf Detail Per Event  
 iCal File

Choose File | No file chosen

**Subject:** Test (2019-AARRPR)

**Message Body** Check the checkbox to include Event Details. Add a custom message if desired.

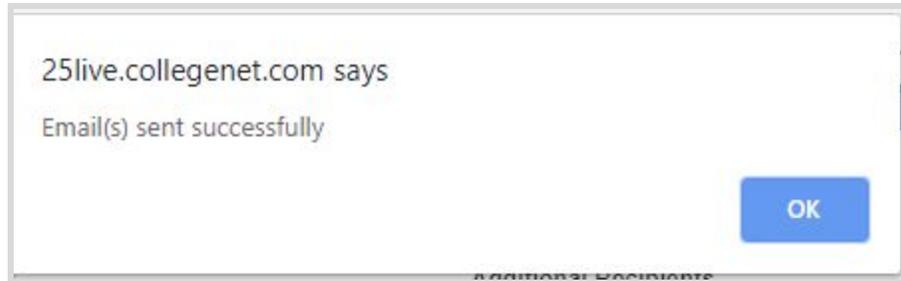
Include event details in body of message

Cancel Send



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A pop-out notification will appear confirming that the email has successfully sent out.





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## PRINT METHOD:

After searching for or navigating into a “starred” or recently viewed event reservation, you will be taken to the Details page to view a high level overview of the event’s details. On the right, click on “More Actions” and select the “Print a Report for this Event” option.

The screenshot displays the 'Details' page for an event reservation. The left sidebar contains the following information:

- General**
- Event Name: ISSO training
- Event Title: ISSO training
- Event Type: Workshop
- Organization: Library & Technology Services
- Scheduler: Hittler, Laura
- Requestor: Hittler, Laura
- Head Count: expected (0), registered (0)
- Description:
- Comments:

The main content area includes:

- Event Categories**
- Custom Attributes** (Add a Custom Attribute button)
- Event Info**
  - Event Owner: Hittler, Laura
  - Creation Date: Fri Nov 30 2018
  - Reference: 2018-ARRCKXZ
  - Cabinet: Special Events FY '18-'19
  - Folder: LTS

On the right side, there is an 'Edit Event' button and a 'More Actions' dropdown menu. The 'More Actions' menu is highlighted with a red box and contains the following options:

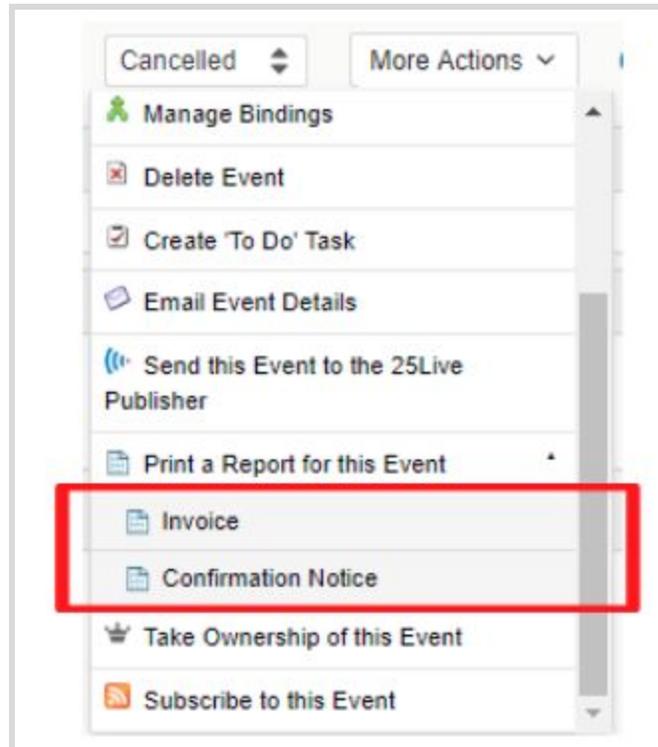
- Cancelled
- Add to Favorites
- Edit Event
- Copy Event
- Manage Related Events
- Manage Endings
- Delete Event
- Create To Do Task
- Email Event Details
- Send this Event to the 25Live Publisher
- Print a Report for this Event

A red arrow points from the 'Event Info' section to the 'Print a Report for this Event' option in the 'More Actions' menu.



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Two additional options will appear in the dropdown, “Invoice” and “Confirmation Notice”. Choose the one you’d like to print.





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A PDF of the document you've requested will be prepared and then downloaded locally to your computer. From here, you can open the PDF file and print to your local printer.

