

Viewing and Modifying Event Pricing



Security Note

The functionality described here requires special permissions to be set up in [Group Administration](#).

- Basic Options: 4.0 *View Pricing on Events* = Yes
- Basic Options: 4.1 *Edit Pricing on Events* = Yes
- Event editing Object Security Permissions

On the Pricing tab of an event, you can:

- Review and adjust the pricing values calculated automatically for the event and each of its occurrences
- Combine event pricing for related events
- [Generate an invoice](#)
- [Break up invoices by occurrence](#)
- [Add and request payments](#)
- [Access the 25Live Accounting tool](#) (if it's been set up for your institution) to create, review, edit, and send invoices for individual organization clients; to track payments and overall client activity; and to generate aging and other reports.

Item	List Price	Adjustments	Price	Taxes	Total	Charge To	Rate Schedule	Rate Group	Debit Account	Credit Account
AV - Extension Cords	\$0.00	+ Add	\$0.00		\$0.00	STUDENT CENTER		Co-Sponsor	CS .:	.
AV - Laptop - Mac	\$15.00	+ Add	\$15.00		\$15.00	STUDENT CENTER	Laptop Rental	Co-Sponsor	CS .:345678	.123456
AV - Microphone - Hand Held with Cord	\$20.00	+ Add	\$20.00		\$20.00	STUDENT CENTER	Microphone Equipment	Co-Sponsor	CS .:345678	.123456
AV - Overhead Projector	\$20.00	+ Add	\$20.00		\$20.00	STUDENT CENTER	Small AV Equipment	Co-Sponsor	CS .:345678	.123456
AV - Power Strip	\$0.00	+ Add	\$0.00		\$0.00	STUDENT CENTER		Co-Sponsor	CS .:	.
AV - Screen - 10'	\$20.00	+ Add	\$20.00		\$20.00	STUDENT CENTER	Small AV Equipment	Co-Sponsor	CS .:345678	.123456
AV - Sound System	\$35.00	+ Add	\$35.00		\$35.00	STUDENT CENTER	Large AV Equipment	Co-Sponsor	CS .:345678	.123456
AV - Technician	\$126.00	+ Add	\$126.00		\$126.00	STUDENT CENTER	Service Staff	Co-Sponsor	CS .:345678	.123456

Image: Example of a single event's pricing view.

Modifying Pricing



Note: Adjustments Made in One Pricing Mode Will Not be Reflected in the Other

If you've never used pricing before, please use **Payment mode**. If your institution uses Freshbooks integration for payments, we recommend **Standard mode**.

Pricing modifications can be made in both **Standard** and **Payment** mode, but payments can only be requested and updated in **Payment mode**. Switching between modes is **not** recommended, so you will need to decide which one suits your business practices more.


To set the **Pricing Mode** system-wide, please see [User Defaults](#).

You can take any of the following actions:

- **Refresh This Event's Pricing** - If changes have been made to the event since the pricing data was initially generated—such as adding new resources or removing locations—you can update the pricing information by clicking this button.
- **Pricing Date** - Use the text field or calendar to specify the latest date that can be used to select rate schedules to apply to event pricing.
(The [effective date of eligible rate schedules](#) must be the same or earlier than the event pricing date.)
 - Pricing values in the form may change depending on the date you specify here
 - You can't change the Pricing Date once an event sponsor organization has been invoiced via 25Live Accounting



Tip: Making Multiple Pricing Edits Quickly

If you make multiple updates to pricing too quickly for the system to be able to update data in the proper order, look for a warning message indicating that pricing may need to be updated, then update the pricing view using the Refresh  icon.

- **Rate Group** - Use the **Update All Items to Rate Group** dropdown menu to modify the rate group for the entire event. Only active rate groups will be selectable.
 - If you only need to modify the rate group for individual items, use dropdown menus in the **Rate Group** column of the table below.

Summary

Pricing Date: Mon Oct 14 2024

Print Invoice

Print Default Invoice

Update All Items to Rate Group:
Choose a Rate Group

Refresh this Event's Pricing

Line Item View
Occurrence View

STUDENT CENTER

Item	List Price	Adjustments	Price	Taxes	Total	Charge To	Rate Schedule	Rate Group	Debit Account	Credit Account
AV - Extension Cords	\$0.00	+ Add	\$0.00		\$0.00	STUDENT CENTER		Co-Sponsor	CS .:	.
AV - Laptop - Mac	\$15.00	+ Add	\$15.00		\$15.00	STUDENT CENTER	Laptop Rental	Co-Sponsor	CS .:345678	.123456
AV - Microphone - Hand Held with Cord	\$20.00	+ Add	\$20.00		\$20.00	STUDENT CENTER	Microphone Equipment	Co-Sponsor	CS .:345678	.123456

Image: You can change the rate group for the entire event or for individual items.

- Adjustments** - Tap or click **Add** in the Adjustments column for a line item to open the form where you can enter and save an adjustment to that list price. Adjustments can be made for the entire event from the **Line Item View** or on individual occurrences from the **Occurrence View**.
 - You can also change the rate schedule and rate group to apply to a line item when it's being adjusted. Click **Save** to complete your change
 - Use the edit icon to update any existing adjustments
 - Click **Delete** within the editing window to remove an adjustment from the event
 - See the expandable "Occurrence Line Item Amounts" section for specific items For example, a 50% discount may show up as a percentage off in the Line Item view or the dollar amount off in the lower portion of Occurrence View
 - Note:** Adjustments made in the Line Item View are applied to the entire item, while adjustments made in the Occurrence View are specific to the line item in that occurrence. This may cause adjustments to display differently in each view.
 - For example, a 50% discount may show up as a percentage off in the Line Item view or the dollar amount off in the lower portion of Occurrence View.



Tip: Make Adjustments on the Occurrence Level

If you're using occurrence-based pricing, it's recommended that you make adjustments on the occurrence level rather than the line item level.

- Charging to an Organization** - Use the dropdown in the Charge To column for a line item to change the client organization responsible for the charge, if multiple organizations have been attached to the event. Charge updates can be made for the entire event from the **Line Item View** or on individual occurrences from the **Occurrence View**
 - When you change the responsible organization in the Charge To column, the line item is moved to a separate section with pricing for that organization client
- Combine Related Events** - Select the **Combine Related Events** checkbox to merge the pricing lines of all related events into your table. Selecting this box will also add a Reference column to your pricing table which displays the event reference number associated with each line item



Tip: Hide Zero Dollar Line Items

Use the **Hide No-Charge Items** checkbox, above the Summary, to hide all items that have a total of \$0. Use the icon next to the line item name to hide only that item.

25Live Accounting

For information on the 25Live Accounting tool, see the articles on [25Live Accounting](#) (for Administrators).