Invoicing for Specific Occurrences in 25Live Pricing

🔒 **Security Note**

Functionality described here requires special permissions are setup in Group Administration.

- Basic Options: 4.0 *View Pricing on Events* = Yes

- Basic Options: 4.1 *Edit Pricing on Events* = Yes

- Basic Options: 5.0 *View Payments on Events* = Yes

- Basic Options: 5.1 *Manage Payments on Events* = Yes

- Event editing Object Security Permissions

25Live pricing allows you to specify which event occurrences to invoice for. For example, you may want to customize an invoice to...

- Bill for only one month in a long series of event occurrences

- Invoice only those occurrences that use specific locations or resources

- Make price adjustments for only some occurrences within related events

You can create additional, separate invoices for any set of occurrences.

⚠️ **Warning: Be Careful Deleting**

We don't recommend deleting custom invoice configurations unless you're *absolutely sure* they are not being used anywhere, as it can result in an "orphaned" invoice that is difficult to revisit or work with.

To Configure a New Custom Pricing Invoice

1. Go to the Event Details Pricing View

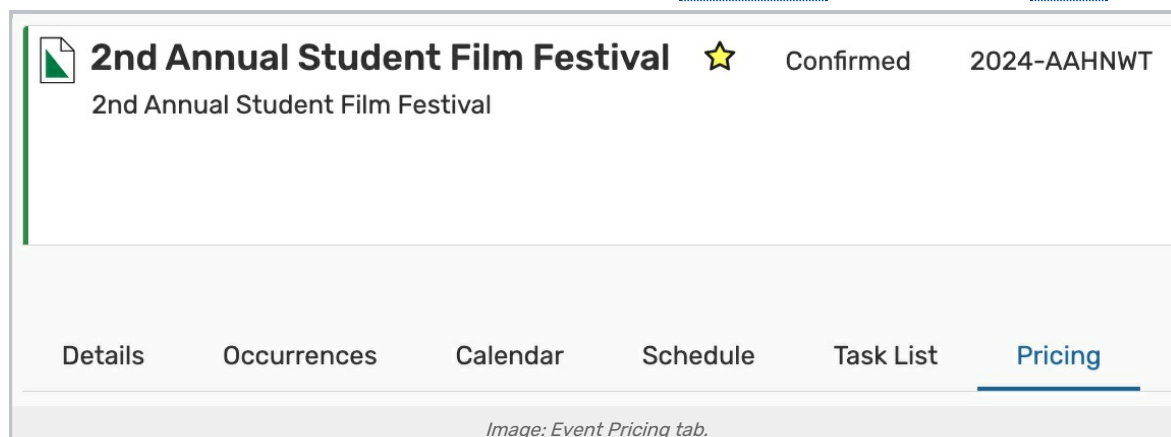- Tap or click on the event's name from any view to go to the Event Details, then choose the Pricing view.

Image: Event Pricing tab.

- If you created a new event, you could also choose to go to the **Event Details** immediately after saving the event.

✓ **Tip: Related Events Pricing**

You can also include [related events](#) and their occurrences when customizing your invoices.

2. Make Sure You Are in Payment Mode

You will need to have the **Pricing Mode** toggle set to **Payment** to create custom invoices.

Image: Make sure Pricing Mode is set to Payment. The Create Invoice button is below the Summary section.

3. Choose Options, and Use the Create Invoice Button

Depending on the event, you may have an option to limit by

- **Organization**

  using the dropdown selection.

- Use the **Create Invoice** button as shown in the image above.

3. Complete Basic Information and Choose Requirements

- Complete the **Name** field.

- Optionally, you can select the **Include Event Type** checkbox. Check this box if you want an event type with a custom formula to display on the invoice.

- Choose Requirements.

Create Invoice ✕

Name and Event Type

Name [_____] *   ☐ Include Event Type

Requirements (0/2 billed) ∧

0 of 2 rows selected

☐	Already Billed	Name
☐	No	Send to Campus Calendar
☐	No	Send to Student Events Calendar

Occurrences (1/2 billed) ∧

Date Range Applied

[None] [▾]

0 of 2 rows selected

☐	Already Billed	Name	Title	Start	End	Comment	Locations	Resources
	Yes	Student Film Festival	Student Film Festival	Fri May 09 2025 6:30 pm	Fri May 09 2025 10:00 pm		BCC Theater	AV - Extension Cords, AV - Laptop - Mac, AV - Microphone - Hand Held with Cord, AV - Overhead Projector, AV - Screen - 10', AV - Sound System, AV - Technician, AV - Power Strip, FS - Soda
☐	No	Student Film Festival	Student Film Festival	Sat May 10 2025 6:30 pm	Sat May 10 2025 10:00 pm			AV - Extension Cords, AV - Laptop - Mac, AV - Microphone - Hand Held with Cord, AV - Overhead Projector, AV - Screen - 10', AV - Sound System, AV - Technician, AV - Power Strip, FS - Soda

[Create Invoice]

Image: Create Invoice options.

4. Choose Occurrences

- All occurrences of the event will appear on a list. Use the checkboxes to select which occurrences to include in the custom invoice.
  - *Note: Each occurrence can only be assigned to one custom invoice.*

- Select the down arrow button under **Date Range Applied** to filter the occurrences that appear in the list by date range.

Image: Use the calendar picker to select the date range to filter by.

5. Save Your New Configuration

Use the **Create Invoice** button to save your new custom invoice configuration.

6. (Optional) Print the Invoice

Use the **Select Invoice** dropdown and select an option to generate the custom invoice.

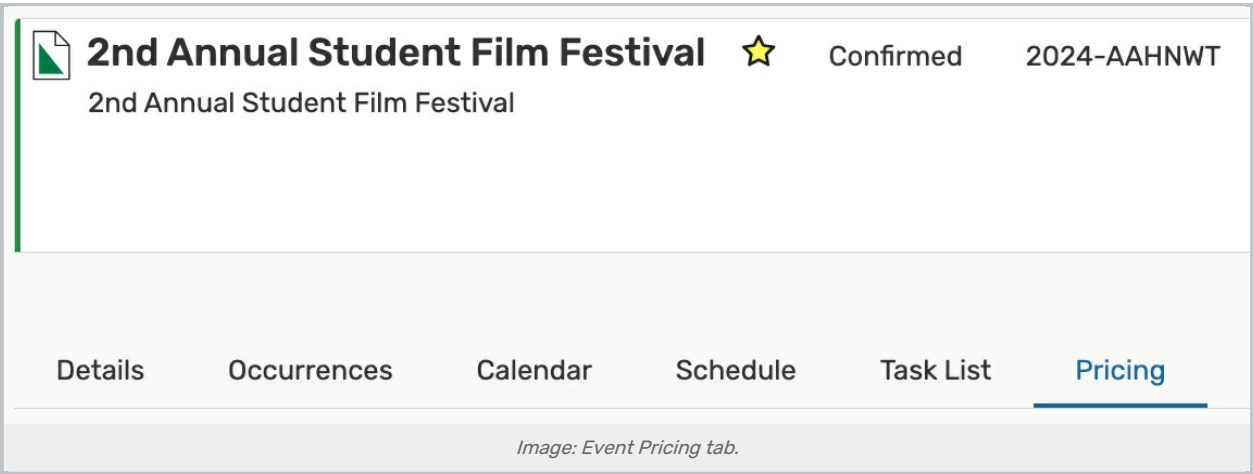# To Apply an Existing Customized Occurrence Configuration

> **Note**
>
> Customized occurrence invoices cannot be used for Draft events.

1. Go to the Event's Details Pricing View

- Tap or click on the event's name from any view to go to the Event Details, then choose the **Pricing** view.

Image: Event Pricing tab.

2. Set Pricing Mode to Payment

- **Pricing Mode** needs to be toggled to **Payment**.
  - *Note: Switching between modes is not recommended. Adjustments made in one mode will not be reflected in the other.*

  - *Image: Make sure your Pricing Mode is set to Payment.*
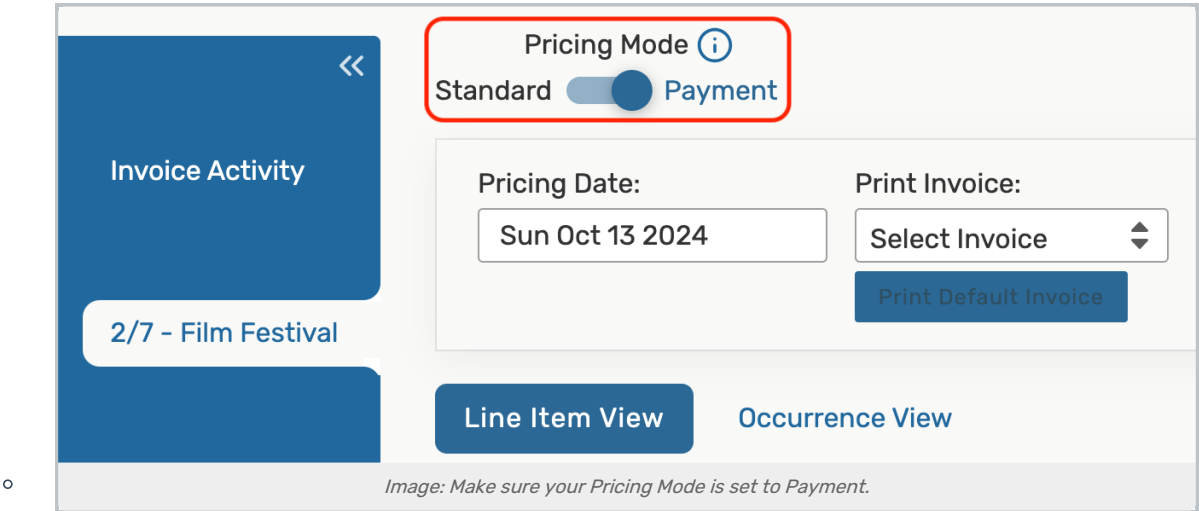
3. Select a Configuration

Once created, custom invoices will be displayed in the sidebar in their own tabs.

4. Take Actions or Delete the Custom Invoice Configurations

Image: Press the Delete Invoice button to remove an invoice from 25Live.

- You can print your invoice or manage payments. If you need to make adjustments, you will need to return to the **Standard** Pricing Mode.

- The **Invoice Lock** option can be toggled to prevent updates from reservation changes and formula changes. Once toggled on, the **Update All Items to Rate Group** dropdown and **Refresh this Event's Pricing** button will be hidden.

- Use the **Delete Invoice** button to remove existing custom invoice configurations and associated activity.